



Presentation on Tunisian Tourism

*Current Situation & Perspectives of
Development*

Index

I. Presentation of the TNTO

II. General Information about Tunisia

III. Economical Indicators

IV. The importance of Tourism in the Tunisian Economy

V. The Tunisian Tourism before the Revolution

VI. Actual Situation of the Sector

VII. Reasons of the Decline (compared to 2010)

VIII. Plan of Action

IX. The Tunisian Touristic Offer

X. Development Perspectives

I. Presentation of the TNTO

1. Legal Form :

The TNTO is a public establishment with a non administrative aspect having the civil personality and the financial autonomy. It is under the Ministry of Tourism's tutoring .

2. Administrative Organization :

The TNTO is administered by an entreprise council and chaired by the Director General

I. Presentation of the TNTO

3. Mission :

The main purpose of the TNTO is to implement the State Strategy in Tourism Sector. The 977 decree of 11th of November 1976 determines the operating procedures of the TNTO, sets its mission and confers the following assignments :

- Develop the tourism sector
- Regulate and control the tourist activity
- Promote the Product
- Ensure the hotel and tourism training

I. Presentation of the TNTO

4. Structures :

General Department.

- 4 Central Departments.
- 17 Departments in which 5 of them are attached to the General Department and 12 of the others spread over the Central Departments.
- 4 Units.
- 17 Regional Tourist Offices and 26 information desks
- 20 Tunisian National Tourist Offices abroad
- 8 Establishments of professional training

Index

I. Presentation of the TNTO

II. General Information about Tunisia

III. Economical Indicators

IV. The importance of Tourism in the Tunisian
Economy

V. The Tunisian Tourism before the Revolution

VI. Actual Situation of the Sector

VII. Reasons of the decline (compared to 2010)

VIII. Plan of Action

IX. The Tunisian Touristic Offer

X. Development Perspectives

II. General information about Tunisia



- **Area** : 164.000 Km²
- **Coastline** : 1.300 Km
- **Population** : 10.629.186
- **Growth rate** : 4,8 %*
- **Airports** : Tunis-Carthage, Monastir, Djerba, Tozeur, Tabarka, Sfax and Gafsa
- **Sea ports** : Tunis-Goulette, Radés, Bizerte, Sousse, Sfax, Gabès and Zarzis

* For the first 3 months of 2012 According to NSI
(National Statistics Institute)

I. General information about Tunisia



- **Currency :**
 - 1 EUR = 2.00 TND (2012)
 - 1 USD = 1.59 TND (2012)

Index

- I. Presentation of the TNTO
- II. General Information about Tunisia
- III. Economical Indicators**
- IV. The importance of Tourism in the Tunisian Economy
- V. The Tunisian Tourism before the Revolution
- VI. Actual Situation of the Sector
- VII. Reasons of the Decline (compared to 2010)
- VIII. Plan of Action
- IX. The Tunisian Touristic Offer
- X. Development Perspectives

III. Economical Indicators (figures 2011)



- **GNP** : 62.210,9 million Dinars
- **National Income**: 65.373,4 million Dinars
- **NR/ Inhabitant**: 6.127,4 Dinars
- **GDP/ Inhabitant** : 6.129,9 Dinars
- **Exports** : 25.091,9 million Dinars
- **Imports** : 33.695,4 million Dinars
- **FDI** : 1.711,3 million Dinars
- **Share of FDI Tourism/total FDI**: is about 1% .

Index

- I. Presentation of the TNTO
- II. General information about Tunisia
- III. Economical indicators
- IV. The Importance of Tourism in the Tunisian Economy**
- V. The Tunisian Tourism before the Revolution
- VI. Actual Situation of the Sector
- VII. Reasons of the Decline (compared to 2010)
- VIII. Plan of Action
- IX. The Tunisian Touristic Offer
- X. Development Perspectives

IV. The Importance of Tourism in the Tunisian Economy



- Contributes to 7% of GDP
- Represents 5.2% of the exports of goods and services
- Covers 56% of the commercial balance deficit.
- provides 19% of the income in currency

IV. The Importance of Tourism in the Tunisian Economy



- Ensures nearly 400.000 direct and indirect jobs representing 12% of the active population.

Index

- I. Presentation of the TNTO
- II. General Information about Tunisia
- III. Economical Indicators
- IV. The Importance of Tourism in the Tunisian Economy
- V. The Tunisian Tourism before the Revolution**
- VI. Actual Situation of the Sector
- VII. Reasons of the Decline (compared to 2010)
- VIII. Plan of Action
- IX. The Tunisian Touristic Offer
- X. Development Perspectives

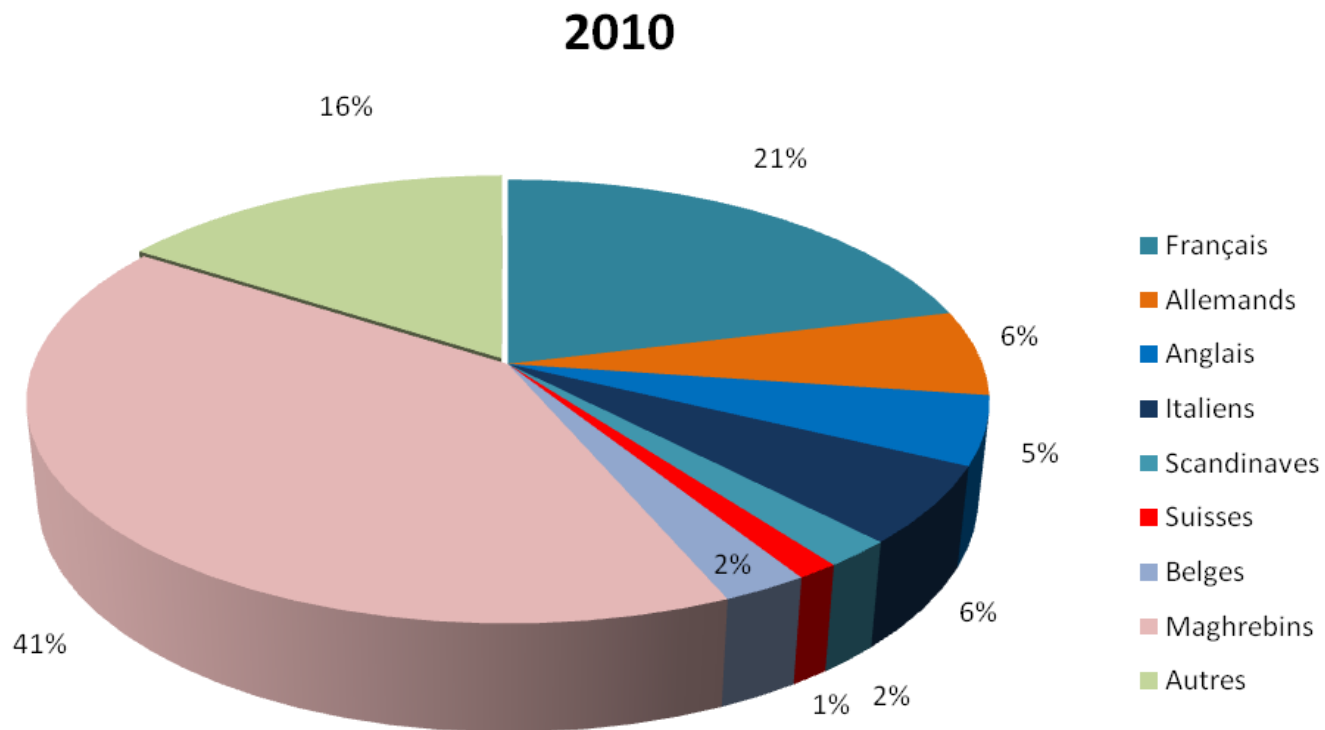
V. The Tunisian Tourism before the Revolution

Despite the impact of the world economical and financial crisis, Tunisia has recorded during 2010 the same performances as 2009 :

- **Arrivals at frontiers** : 6.902.304 (0,00%)
- **Global nights** : 35.565.104 (2,7%)
- **Touristic income** : 3522,5 millions DT (1,5%)
- **Available capacity** : 241.528 (0,7%)
- **Exploited capacity** : 192.048 (1,6)
- **Average length of stay** : 4,7 (0,1%)

V. The Tunisian Tourism before the Revolution

Share of main nationalities (Arrivals of non-residents at frontiers) : from the 1st of January to 31st of December 2010



Index

- I. Presentation of the TNTO
- II. General Information about Tunisia
- III. Economical Indicators
- IV. The Importance of Tourism in the Tunisian Economy
- V. The Tunisian Tourism before the Revolution
- VI. Actual Situation of the Sector**
- VII. Reasons of the Decline (compared to 2010)
- VIII. Plan of Action
- IX. The Tunisian Touristic Offer
- X. Development Perspectives

VI. Current Situation of the Sector

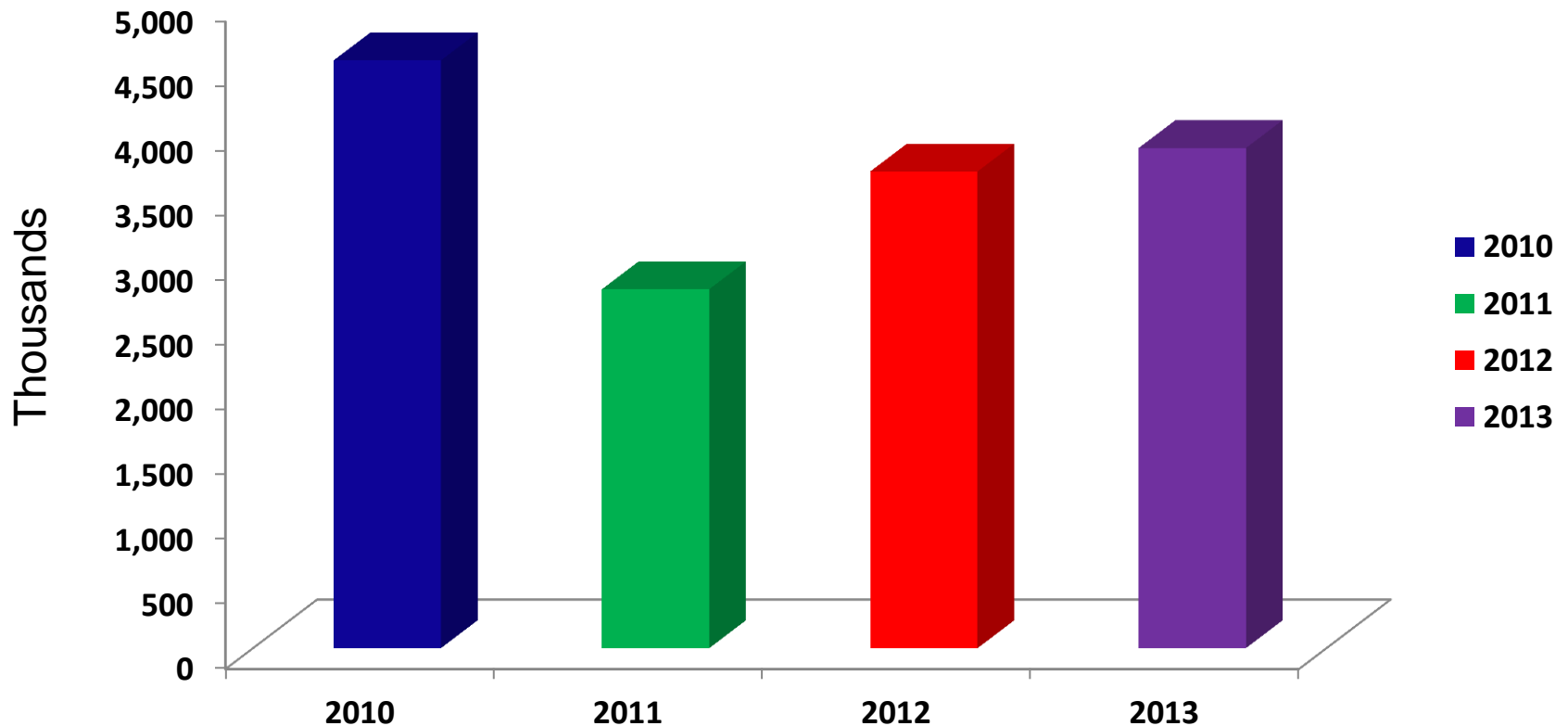
Until the 20th of August 2013, there is generally a slight rebound at all touristic indicators* :

- **Arrivals at frontiers** : 3.861.693 (+4,9%)*
- **Global nights** : 18.398.734 (-2,4%)*
- **Touristic income** : 1878,3 millions TND (+1,9%)*
- **Exploited capacity** : 181.138 (+3%)*

* Compared to same period in **2012**

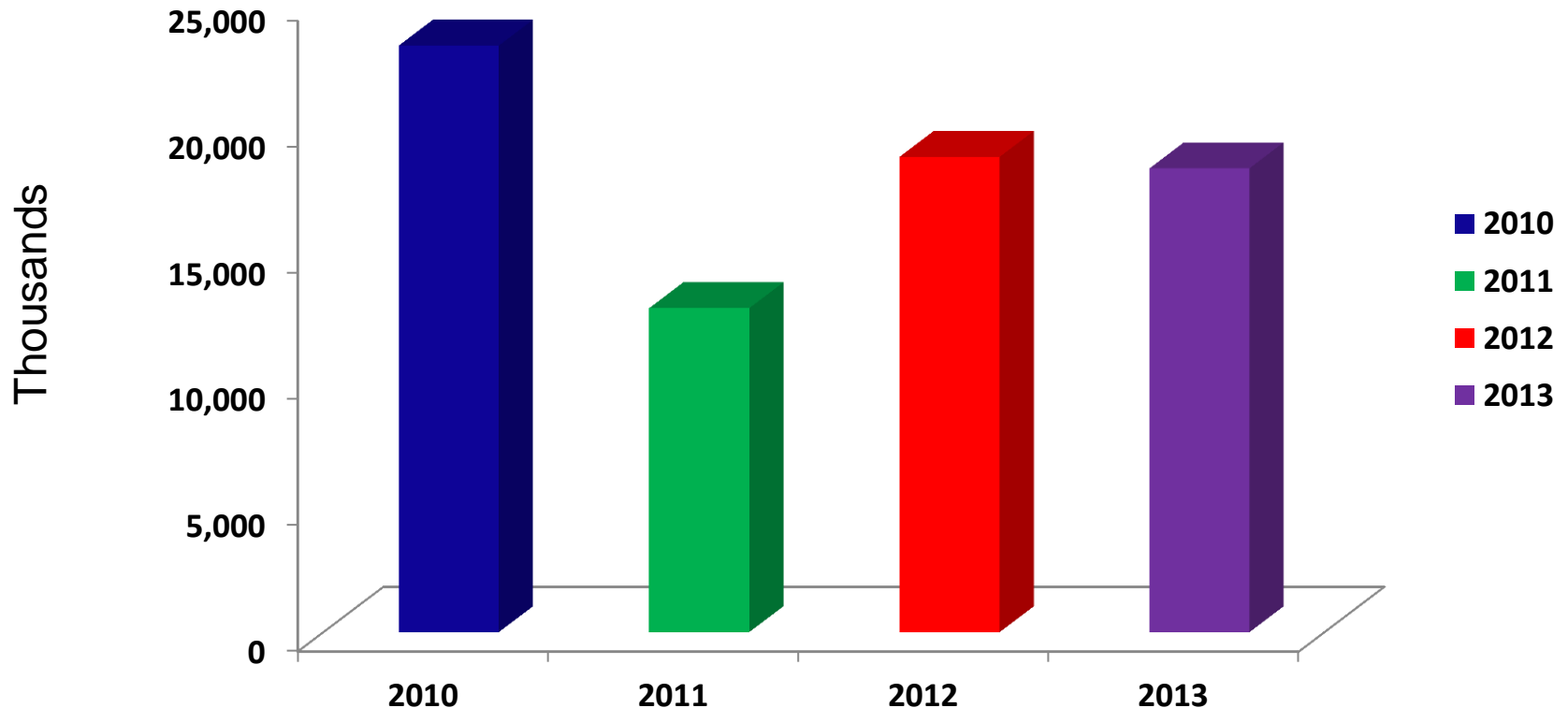
VI. Current situation of the Sector

**Arrivals at frontiers (same periods)
to August 20th, 2013**



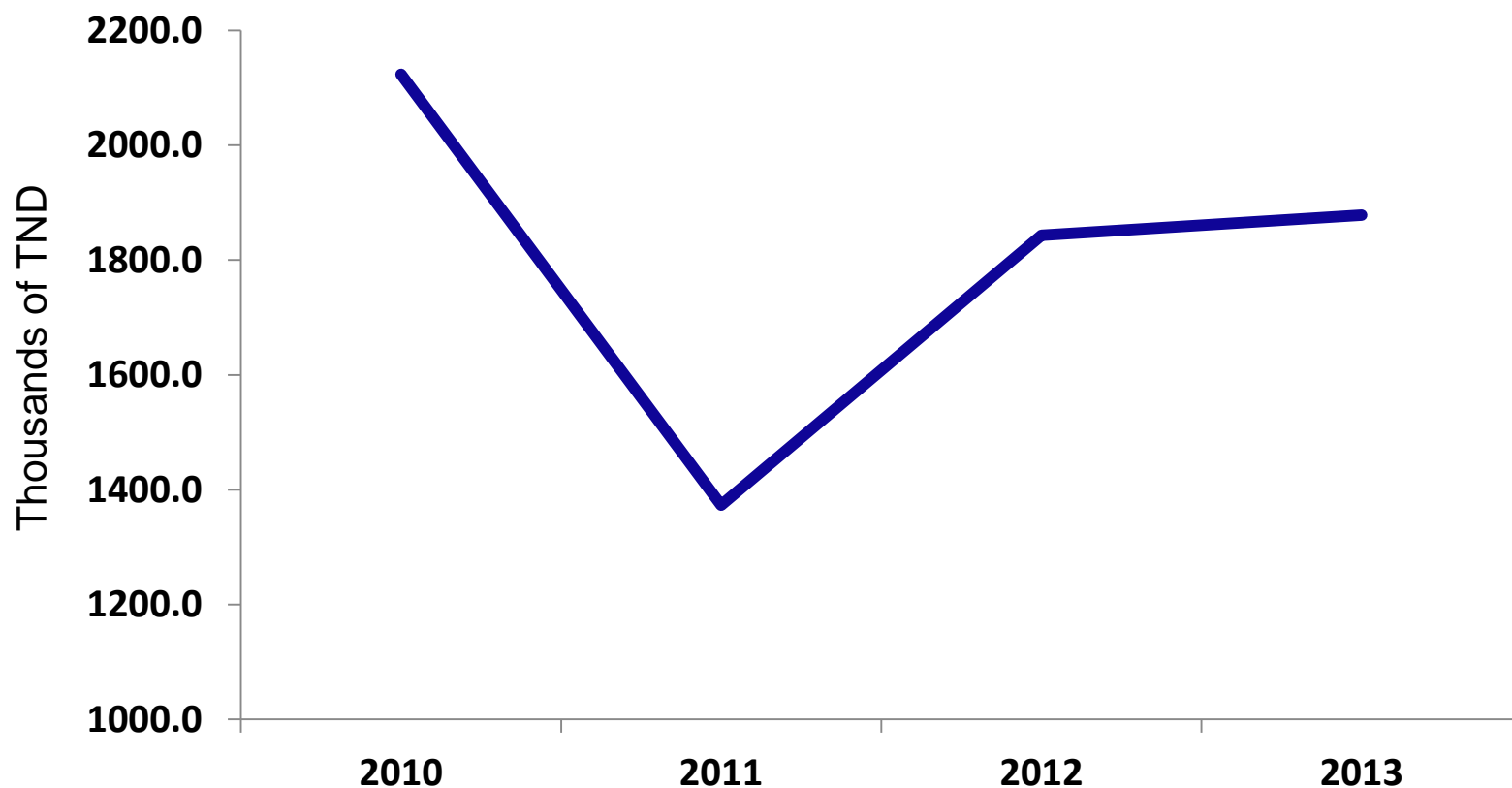
VI. Current situation of the Sector

**Global Nights (same periods)
to August 20th, 2013**



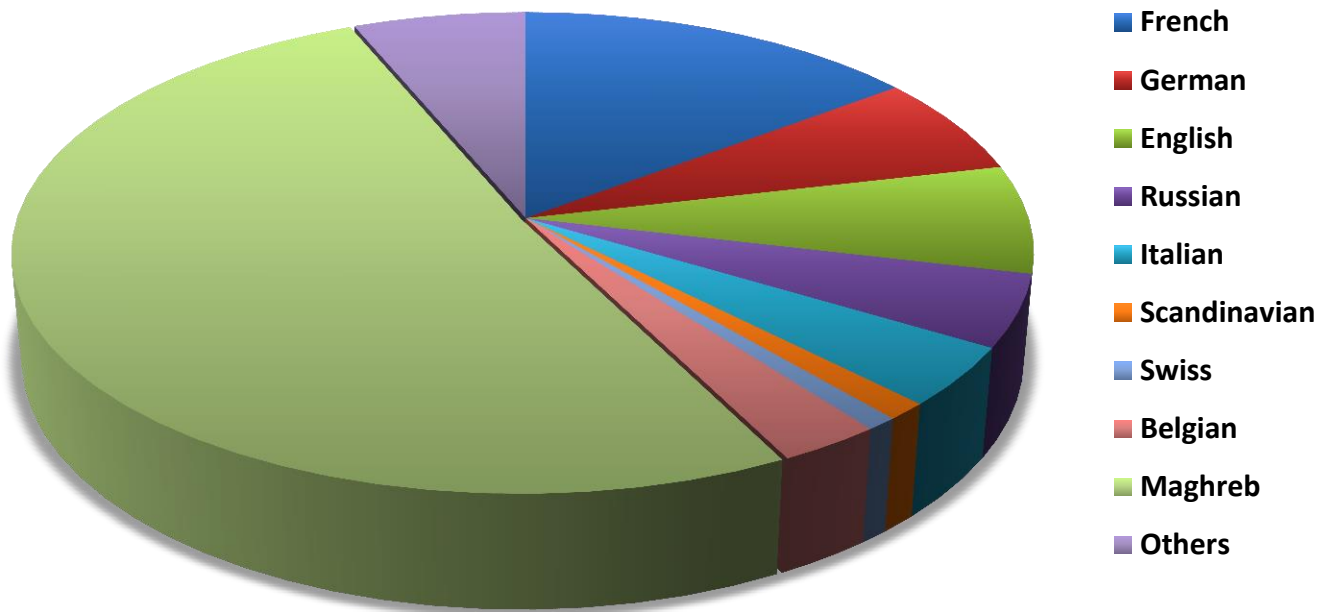
VI. Current situation of the Sector

**Touristic Income (same periods)
to August 20th, 2013**



V. Current situation of the sector

Share of main nationalities (arrivals of non- residents at frontiers): From 1st of January to 20th of August 2013



Index

- I. Presentation of the TNTO
- II. General Information about Tunisia
- III. Economical Indicators
- IV. The Importance of Tourism in the Tunisian Economy
- V. The Tunisian Tourism before the Revolution
- VI. Actual Situation of the Sector
- VII. Reasons of the Decline (compared to 2010)**
- VIII. Plan of Action
- IX. The Tunisian Touristic Offer
- X. Development Perspectives

VII. The Reasons of the Decline

- The Revolution of 14 January
- The Arab Revolutions (Egyptian, Syrian...)
- The Excessive mediatisation of the negative effects of the Revolution
- The political instability

Index

- I. Presentation of TNTO
- II. General Information about Tunisia
- III. Economic Indicators
- IV. The Importance of Tourism in the Tunisian Economy
- V. The Tunisian Tourism before the Revolution
- VI. The Actual Situation of the Sector
- VII. The Reasons of the Decline (compared to 2010)
- VIII. Plan of Action**
- IX. Tunisian Touristic Offer
- X. Development Perspectives

VIII. Plan of Action

In order to face this situation and to boost the touristic activity, TNTO has taken multiple measures which are:

- Substantial increase of budget for the promotional operations of great importance
- Subsidy of air transport for the first time in order to maintain flights for the destination.
- Supporting the Tour -Operators featuring Tunisia to stimulate the sales.

VIII. Plan of Action

These actions have been beneficial to:

- Regain the confidence of the consumers
- Appease the decline of the number of tourists

Index

- I. Presentation of TNTO
- II. General Information about Tunisia
- III. Economic Indicators
- IV. The Importance of Tourism in the Tunisian Economy
- V. Tunisian Economy before the Revolution
- VI. The Actual Situation of the Sector
- VII. The Reasons of the Decline (compared to 2010)
- VIII. Plan of Action
- IX. Tunisian Touristic Offer**
- X. Development Perspectives

IX. Tunisian Touristic Offer

1. Image and Notoriety:

- Strategic Situation in the middle of the Mediterranean
- Geographic proximity to Europe
- Coastline extending over 1300 kilometers and a modern and diverse hotel infrastructure
- A good relation Quality/Price
- Good reception and hospitality
- Total serenity
- Great diversity of natural landscapes

IX. Tunisian Touristic Offer

2. Product Diversity:

Tunisia offers a diverse and rich product:

- Beach
- Tourism of Health and Well Being
- Golf
- Tourism of Congress and Incentives
- Cultural Tourism
- Saharan Tourism
- **Ecological Tourism**

IX. Tunisian Touristic Offer

a. Beach:



- It represents the most important product of tunisian tourism thanks to beautiful beaches and a modern hotel infrastructure
- Over 1.300 Km of coastline, only 7% are exploited



IX. Tunisian Touristic Offer

a. Beach:



- 850 hotels, 80 % of which are on the coast
- A hotel capacity of 240.000 beds, 190.000 beds of which are exploited

IX. Tunisian Touristic Offer

b. Tourism of Health and Well Being:



- Thalasso

- ✓ Tunisia : 2nd world destination after France with 49 centres of thalassotherapy spread over the different touristic regions
- ✓ Total number of clients : 152.051 (2007)

IX. Tunisian Touristic Offer



- Thermalism

- ✓ Hundreds of hot springs which are well known for their therapeutical virtues since the roman period

- Medical Tourism

- ✓ Based on excellent private clinics with a worldwide high level medical staff
- ✓ Tunisia is known for general and aesthetical surgery



IX. Tunisian Touristic Offer

c. Golf Tourism :



- Tunisia is endowed with 10 golf courses which are already exploited, 2 courses under construction, 3 other projects will be used in the nearest future and 5 others under study.
- A unique worldwide course edging the desert.

IX. Tunisian Touristic Offer

c. Golf Tourism:



- Nearly 70.000 golfers each year
- Figures of green fees 2010 : 215.224
- Achievements of green fees for the last years are nearly: 233.390

IX. Tunisian Touristic Offer

d. Saharan Tourism:



- Great diversity of landscapes, sand dunes, oasis of hills, maritime oasis chott (salt lakes), berber villages, troglodyte villages.



- Very comfortable charm hotels with good quality services

IX. Tunisian Touristic Offer

e. Cultural Tourism:



- Tunisia has known during these 3000 years of history many great civilizations which have contributed to the richness of the cultural heritage of the country :

- ✓ Libyc-berber (the first inhabitants of the country)
- ✓ Punic/Carthaginian
- ✓ Roman
- ✓ Byzantine
- ✓ Arab-muslim

IX. Tunisian Touristic Offer

e. Cultural Tourism :



- Tunisia is the country of Carthage and the homeland of HANNIBAL
- **Seven sites** are classified by UNESCO **human heritage** :
 - ✓ Amphitheater of El Jem (1979)
 - ✓ Punic City of Kerkouane and its necropolis (1985)
 - ✓ Dougga (1997)
 - ✓ Kairouan (1988)
 - ✓ Medina of Sousse (1988)
 - ✓ Medina of Tunis (1979)
 - ✓ Archeological site of Carthage

VIII. Tunisian Touristic Offer

f. Tourism of congress and incentives:



- Most of our 4 and 5 star hotels are endowed with necessary equipments for this activity



- Better relation
exotism/distance for the
organization of incentive
trips

IX. Tunisia Touristic Offer

j. Ecological Tourism:



- ✓ Respectful and durable development of the environment.
- ✓ A big number of natural parks and reserves to satisfy the curiosity of the visitors such as Ichkeul National Parc which is listed as a world heritage since 1980.
- ✓ Tunisia is known as the heaven of a big number of immigrant birds.

Index

- I. Presentation of TNTO
- II. General Information about Tunisia
- III. Economic Context
- IV. The Importance of Tourism in the Tunisian Economy
- V. Tunisian Tourism before the revolution
- VI. Actual situation of the sector
- VII. The reasons of the decline (compared to 2010)
- VIII. Plan of action
- IX. Tunisian Touristic Offer
- X. Development Perspectives**

X. Development Perspectives

The plan of action for the future of tourism in Tunisia for the next years is based on the following 4 axes:

A) Reinforcement of attractiveness of Tunisia

- To highlight the quality of offer and services
- New positioning(emotion and discovery)

B) Creation of the value and increase of touristic income

- Products : Wellness, golf, saharan tourism, tourism of incentives

X. Development Perspectives

C) Reducing the seasonality and multiplication of opportunities

- Niche products and encouragement of short stay

D) Conquest of new markets and new segments of clients

- Distant markets (China, Japan, Canada, USA...)
- Seniors and youth (FR, GER, UK)

Selection of Visuals of Institutional Campaign Year 2013

Une journée en Tunisie

Matin : Golf à Carthage

Soir : Thalasso 5 étoiles à Hammamet



Une journée en Tunisie

Matin : Golf de Monastir

Après-midi : Visite de l'amphithéâtre d'El Jem



Une journée en Tunisie

Matin : Plage à Djerba

Soir : Visite des ksour de Tataouine



Une journée en Tunisie

Matin : Découverte du Sahara à Douz

Après-midi : Sports nautiques à Djerba



Une journée en Tunisie

Matin : Trekking à Tamerza

Soir : Spa à Tozeur



Tunisian National Tourist Office



Thank You