A4 TOURISM DEMAND

A4.1 VISITOR ARRIVALS[1]

Basic characteristics the trends in visitor arrivals are explained in this section.

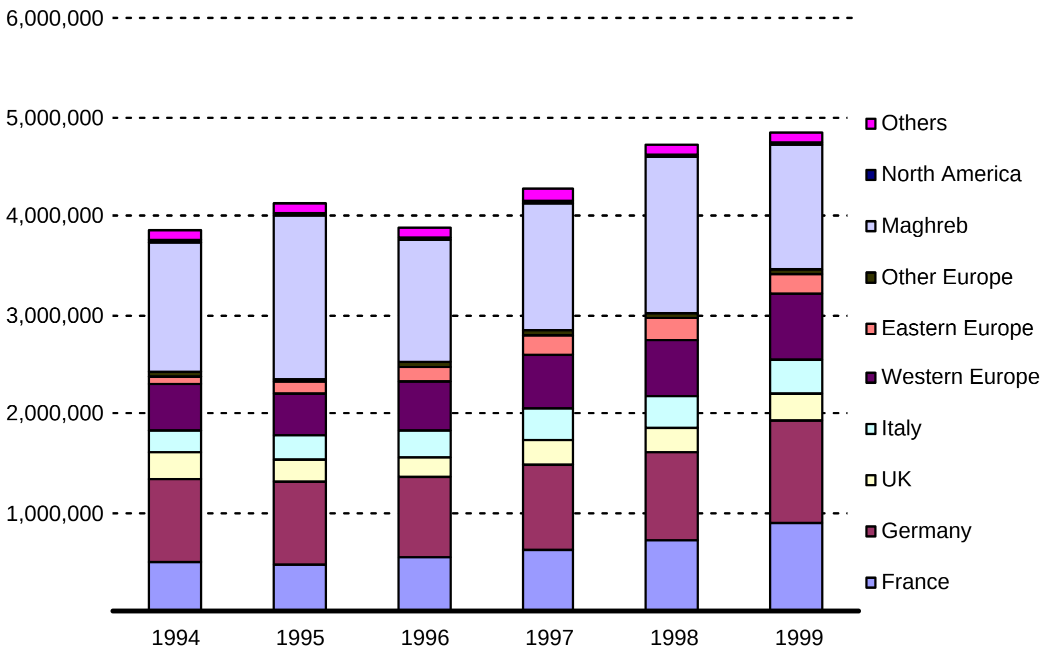
(1) Source Markets

In 1999, Tunisia received 4.8 million foreign visitors.[2] (total arrivals). The visitors from European countries reached 3.4 million in 1999, which was approximately 72% of the total arrivals. While, visitors from neighboring Maghreb counties represented 1.2 million in the same year, which was approximately 26% of the total arrivals.

Visitors from these two source regions account for almost 98% of the total arrivals, and there are comparatively few visitors from other regions of the world (e.g., North America and East Asia which are also huge tourist generating markets).

Figure A4.1.1 shows the recent trends of foreign visitor arrivals.

Figure A4.1.1 Trends of Visitor Arrivals 1994-1999



Note: Eastern Europe includes Poland, Czech, Slovakia, Hungary, Bulgaria and Russia. Western Europe includes Scandinavian, Switzerland, Belgium, Netherlands, Austria, Spain, Luxembourg,, Greece and Ireland.

Source: ONTT, Le Tourisme Tunisien en Chiffres, various years

[1] Tourism statistics in Tunisia use different definition of tourists from that of WTO. The number of arrivals at the frontier immigration offices includes not only tourists but also transit visitors who stay less than 24 hours. The word "visitor" in this Study includes all those who entered Tunisia with immigration records, including the Tourist visitors.

[2] If the count of Tunisians residing abroad is included, the count rises to 5.9 million.

Among the European countries, the major source countries in 1999 are Germany (1,036 thousand), France (894 thousand), Italy (355 thousand) and the UK (262 thousand). The arrivals from France and Germany reached over 1.9 million accounting for approximately 40% of the total visitors, and those of the above four major source countries accounted for more than a half of the total visitor arrivals. Details of the visitor arrivals in recent years are shown in Table A4.1.1.

Table A4.1.1 Trends of Visitor Arrivals 1994-1999

	Number of Visitors						AAGR
	1994	1995	1996	1997	1998	1999	1994-99
Germany	852,591	837,116	808,478	858,302	883,944	1,036,262	4.0%
France	484,837	465,103	541,878	619,891	709,023	893,664	13.0%
Italy	229,811	245,933	270,110	314,042	328,256	354,616	9.1%
UK	267,223	239,567	206,068	248,010	263,798	261,877	-0.4%
Scandinavian	61,732	59,663	88,352	80,408	56,201	64,699	0.9%
Austria	71,624	65,036	90,314	114,363	106,174	138,261	14.1%
Belgium	78,132	74,198	87,442	102,659	114,922	132,361	11.1%
Netherlands	80,364	70,507	71,798	67,347	68,116	69,147	-2.9%
Switzerland	76,407	74,539	75,478	86,609	84,247	110,202	7.6%
Spain	43,071	33,289	43,350	54,422	68,105	86,857	15.1%
Western Europe Total	2,287,092	2,207,103	2,321,627	2,589,160	2,739,929	3,202,020	7.0%
Poland	13,726	19,772	34,617	52,649	87,332	77,135	41.2%
Czech	25,117	32,749	42,598	54,551	50,913	59,733	18.9%
Hungary	21,693	19,687	18,603	16,979	17,172	23,281	1.4%
Russia	9,039	12,967	31,610	37,823	26,045	22,067	19.5%
Eastern Europe Total	83,425	105,205	147,819	190,302	212,754	211,336	20.4%
Other Europe	45,173	44,934	53,447	66,490	58,700	47,501	1.0%
Europe Total	2,415,690	2,357,242	2,522,893	2,845,952	3,011,383	3,460,857	7.5%
Algeria	672,446	988,608	669,933	605,383	684,221	616,447	-1.7%
Libya	543,973	618,746	526,146	626,393	834,473	603,074	2.1%
Morocco	99,994	26,689	30,881	42,847	45,111	37,785	-17.7%
Mauritania	6,995	6,367	5,945	6,675	5,744	5,382	-5.1%
Maghreb Total	1,323,408	1,640,410	1,232,905	1,281,298	1,569,549	1,262,688	-0.9%
USA	11,683	11,499	12,775	12,722	12,470	13,627	3.1%
Canada	12,592	13,318	14,170	13,967	15,361	13,423	1.3%
North America Total	24,275	24,817	26,945	26,689	27,831	27,050	2.2%
Japan	4,008	3,738	4,706	5,506	8,354	9,314	18.4%
Others Total	92,173	97,378	101,850	109,168	108,942	81,063	-2.5%
Foreign Total	3,855,546	4,119,847	3,884,593	4,263,107	4,717,705	4,831,658	4.6%

Note: Eastern Europe includes Poland, Czech, Slovakia, Hungary, Bulgaria and Russia. Western Europe includes Germany, France the UK, Italy, Scandinavian, Switzerland, Belgium, Netherlands, Austria, Spain, Luxembourg, Greece and Ireland.

AAGR: Average Anual Growth Rate

Source: ONTT, Le Tourisme Tunisien en Chifferes

(2) Growth Rate

As shown in Table A4.1.1, the overall average growth rate of visitor arrivals per annum between 1994 and 1999 was 4.6%, which was much higher than the world average during 1994 through 1998 (3.4%[3]). The number of visitors to Tunisia seems to be steadily increasing after a sharp drop of tourism during the Gulf War in 1991.

The growth rates of the major source countries during the same period were: Germany 4.0%, France 13.0%, Italy 9.1%, the UK -0.4%, Maghreb countries -0.9%. The rates for the UK and Maghreb countries suffered slight decreases in spite of the generally favorable growth of most countries.

Meanwhile, remarkable growth rates were recorded by East European countries[4] (20.4%) especially by Poland (41.2%), by Japan (18.4%) and by Spain (15.1%) during the same period. These countries can be considered as successful emerging source markets. However, the real numbers of visitors from these countries are still small.

The numbers of visitors from Netherlands and Scandinavian countries experienced also decreases despite favorable increases in the other source countries.

[3] WTO (1999), Yearbook of Tourism Statistics: Figure of 1998 is preliminary estimates.
[4] It can largely be attributed to promotional activities started in 1995.

A4.2 VISITOR STAY

Accurate length-of-stay statistics for all visitors to Tunisia on the basis of immigration records is not tabulated at present in Tunisia. However, ONTT tracks the numbers of visitors and visitor-nights spent in officially registered accommodation, which consists mainly of the classified hotels and some other types of commercial lodging. Hotel management submits statistical information regularly to ONTT on the profile of their registered guests. This ONTT information includes the following data according to the source country of visitors:

1 Place of stay,
2 Length of each stay in hotels.

The Study Team analyzed the information in order to clarify the programmatic and geographical behavior of visitors to Tunisia.

A4.2.1 Trend of Visitor-Nights

Table A4.2.1 shows the recent trend of visitor-nights in hotels according to the major source market.

The overall visitor-nights spent by foreign visitors have averaged a 6.1% rate since 1994. With the exception of the dip in 1995, the visitor-nights count has been growing in each year in accordance with the increase in number of visitors.

In 1999, the total visitor-nights spent by foreign visitors reached 33.1 million nights, which resulted the average length of stay by the overall foreign visitors as 6.9 nights. There are many visitors who do not stay even one night; particularly those from neighboring Maghreb countries, and the average length of stay by those are very short. Visitors from most European countries who visit Tunisia for their holiday purpose and tend to stay longer (10 to 20 days or even more).

Table A4.2.1 Trend of Visitor-Nights in Hotels

	Number of Visitor-Nights						AAGR
	1994	1995	1996	1997	1998	1999	1994-99
Germany	10,689,547	10,282,862	9,626,019	10,372,738	10,366,531	12,092,699	2.5%
France	3,809,339	3,546,073	4,038,486	4,796,444	5,353,048	6,767,897	12.2%
Italy	1,880,919	1,860,574	1,945,867	2,301,531	2,354,086	2,620,586	6.9%
UK	2,672,307	2,303,954	1,914,045	2,246,266	2,480,819	2,637,481	-0.3%
Scandinavia	508,153	478,839	704,234	703,152	445,902	541,411	1.3%
Austria	612,652	480,437	637,772	898,194	886,069	1,186,971	14.1%
Belgium	761,017	654,794	772,307	984,213	1,047,402	1,253,099	10.5%
Netherlands	757,804	640,413	615,432	574,977	590,028	579,418	-5.2%
Switzerland	722,925	700,424	699,988	819,403	845,377	1,025,070	7.2%
Spain	336,300	232,448	306,460	416,989	504,142	640,671	13.8%
Western Europe Total	22,926,993	21,380,111	21,481,819	24,341,937	25,164,971	29,666,743	5.3%
Poland	75,507	136,937	283,222	491,754	885,961	752,349	58.4%
Czech	226,765	322,677	404,434	579,044	537,911	636,609	22.9%
Hungary	N/A	110,641	129,759	116,434	93,759	111,352	N/A
Russia	48,701	88,409	259,951	371,438	266,228	202,601	33.0%
Eastern Europe Total	350,973	686,852	1,117,978	1,639,763	1,871,851	1,826,464	39.1%
Other Europe	218,575	141,230	210,211	254,253	244,979	226,042	0.7%
Europe Total	23,496,541	22,208,193	22,810,008	26,235,953	27,281,801	31,719,249	6.2%
Algeria	398,405	592,398	543,331	514,997	521,519	445,761	2.3%
Libya	190,821	179,511	210,818	254,613	262,250	198,843	0.8%
Morocco	76,269	50,952	53,687	66,653	64,297	58,387	-5.2%
Maghreb Total	665,495	822,861	807,836	836,263	848,066	702,991	1.1%
USA	65,046	63,406	60,274	53,136	68,819	49,081	-5.5%
Canada	72,485	88,961	90,961	89,014	110,088	130,420	12.5%
North America Total	137,531	152,367	151,235	142,150	178,907	179,501	5.5%
Japan	20,726	20,395	24,274	28,991	39,491	53,941	21.1%
Others Total	381,648	330,984	360,881	469,759	478,728	548,989	7.5%
Foreign Total	24,681,215	23,514,405	24,129,960	27,684,125	28,787,502	33,150,730	6.1%

Note: Eastern Europe includes Poland, Czech, Slovakia, Hungary, Bulgaria and Russia. Western Europe includes Germany, France the UK, Italy, Scandinavian, Switzerland, Belgium, Netherlands, Austria, Spain, Luxembourg, Greece and Ireland.

AAGR: Average Anual Growth Rate

Source: ONTT, Le Tourisme Tunisien en Chifferes

A4.2.2 Length of Stay

Table A4.2.2 shows recent trend of average length of stay in registered hotels, according to the major source market. As indicated in the table, the average length of stay seems stable, however, that of visitors form European countries is slightly decreasing. The reasons for this result are considered to be:

- Multiple and shorter vacations,
- Fiercer competition among tourist destinations,
- Increased variety of tour purposes such as cultural tourism, incentive or seminar participants, etc. that require shorter stay, and
- New trend of week-end travels in Europe, etc.

Table A4.2.2 Trend of Length of Stay in Hotels

	Average Length of Stay						AAGR
	1994	1995	1996	1997	1998	1999	1994-99
Germany	12.5	12.3	11.9	12.1	11.7	11.7	-1.42%
France	7.9	7.6	7.5	7.7	7.5	7.6	-0.73%
Italy	8.2	7.6	7.2	7.3	7.2	7.4	-2.02%
UK	10.0	9.6	9.3	9.1	9.4	10.1	+0.14%
Scandinavia	8.2	8.0	8.0	8.7	7.9	8.4	+0.33%
Austria	8.6	7.4	7.1	7.9	8.3	8.6	+0.07%
Belgium	9.7	8.8	8.8	9.6	9.1	9.5	-0.57%
Netherlands	9.4	9.1	8.6	8.5	8.7	8.4	-2.33%
Switzerland	9.5	9.4	9.3	9.5	10.0	9.3	-0.34%
Spain	7.8	7.0	7.1	7.7	7.4	7.4	-1.13%
Poland	5.5	6.9	8.2	9.3	10.1	9.8	+12.14%
Czech	9.0	9.9	9.5	10.6	10.6	10.7	+3.37%
Hungary	N/A	5.6	7.0	6.9	5.5	4.8	N/A
Russia	5.4	6.8	8.2	9.8	10.2	9.2	+11.25%
Europe Total	9.7	9.4	9.0	9.2	9.1	9.2	-1.18%
Algeria	0.6	0.6	0.8	0.9	0.8	0.7	+4.07%
Libya	0.4	0.3	0.4	0.4	0.3	0.3	-1.23%
Morocco	0.8	1.9	1.7	1.6	1.4	1.5	+15.17%
Maghreb Total	0.5	0.5	0.7	0.7	0.5	0.6	+2.06%
USA	5.6	5.5	4.7	4.2	5.5	3.6	-8.34%
Canada	5.8	6.7	6.4	6.4	7.2	9.7	+11.04%
North America	5.7	6.1	5.6	5.3	6.4	6.6	+3.21%
Middle East	2.5	2.3	2.3	2.7	2.8	3.6	+7.33%
African	5.3	3.1	2.7	3.0	3.2	4.3	-4.19%
Japan	5.2	5.5	5.2	5.3	4.7	5.8	+2.29%
Others	5.2	4.5	5.0	6.8	6.6	11.7	+17.71%
Others Total	4.1	3.4	3.5	4.3	4.4	6.8	+10.34%
Foreign Total	6.4	5.7	6.2	6.5	6.1	6.9	+1.04%

Note: Eastern Europe includes Poland, Czech, Slovakia, Hungary, Bulgaria and Russia. Western Europe includes Germany, France the UK, Italy, Scandinavian, Switzerland, Belgium, Netherlands, Austria, Spain, Luxembourg, Greece and Ireland.

AAGR: Average Anual Growth Rate

Source: ONTT, Le Tourisme Tunisien en Chifferes

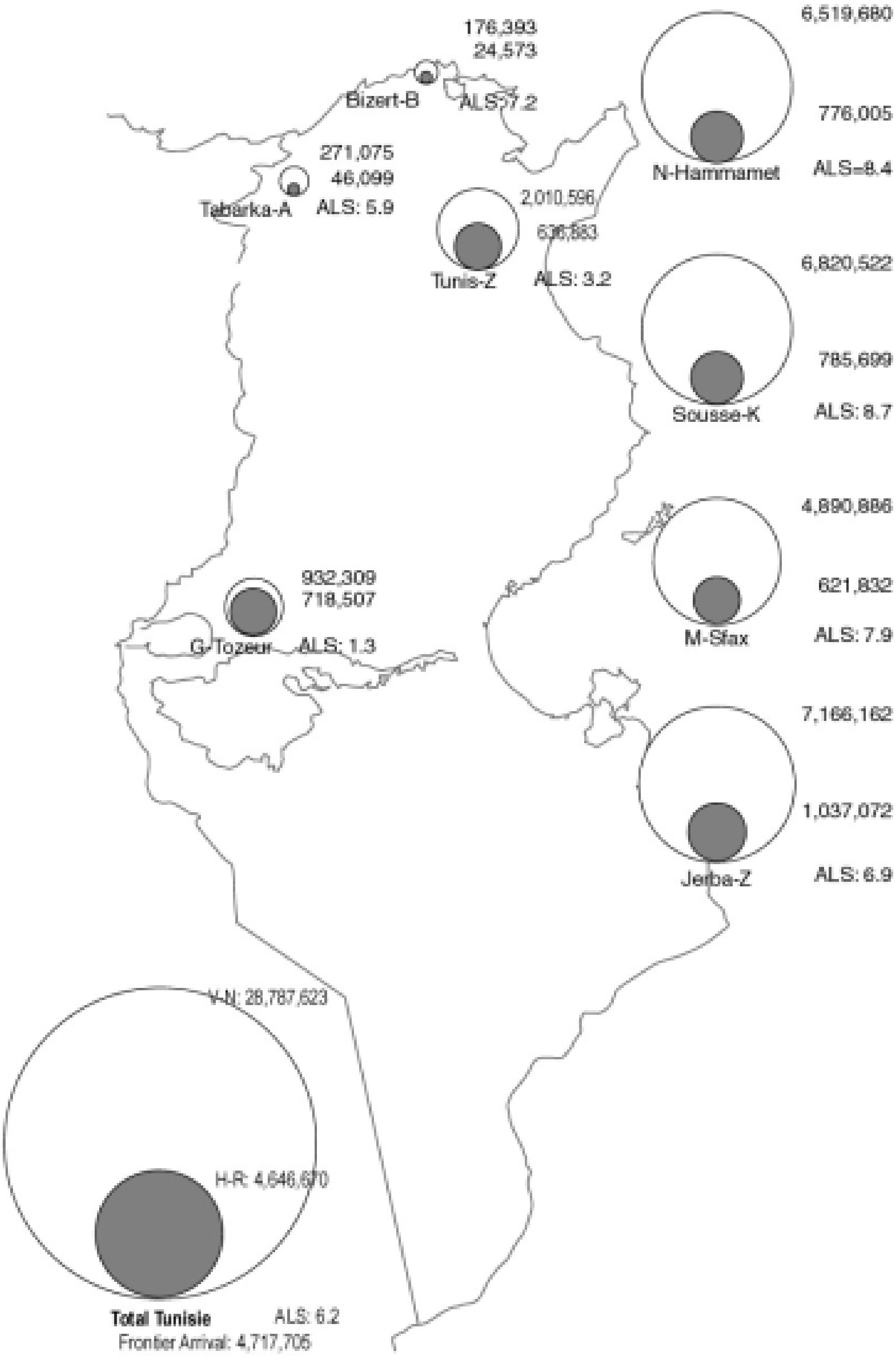
A4.2.3 Visitor-Nights by Region and Source Market

(1) Geographical Distribution of Overall Visitor Stays

Figure A4.2.1 shows the geographical distribution of numbers of visitors and visitor-nights of overall foreign visitors in 1998 according to the eight tourism regions defined by ONTT.

The difference between the size of the circles representing the number of visitors and visitor-nights respectively is understood as the effect of multiple nights spent by the visitors. An estimate of the average length of stay for each region is calculated by dividing the visitor-nights by the number of visitors registered in hotels. The different regional figures indicate diversity of tourist behavior according to the different tourism regions.

Figure A4.2.1 Geographical Distribution of Overall Visitor Stay 1998



Note: H-R: hotel registration, V-N: visitor night, ALS: average length of stay

Source: ONTT, Le Tourisme Tunisien en Chifferes, 1998, JICA Study Team

Table A4.2.3 shows the recent five-year trends of the number of visitors registered in hotels, visitor-nights and average length of stay according to the ONTT tourism regions. Very small changes were observed in the percentages of each tourism region through 1994-1998.

Table A4.2.3 Trends of Visitors and Visitor-Nights by Tourism Region

Tourism Region	1994		1995		1996		1997		1998			
	V-N (,000)	Ratio (%)	V-N (,000)	Ratio (%)	V-N (,000)	Ratio (%)	V-N (,000)	Ratio (%)	V-N (,000)	Ratio (%)	Hotel Registrations	ALS
Tunis-Z	1,857	7.5	1,686	7.2	1,592	6.6	1,860	6.7	2,011	7.0	636,883	3.16
N-Hammamet	6,596	26.7	5,897	25.1	5,693	23.6	6,567	23.7	6,520	22.6	776,005	8.40
Sousse-K	6,000	24.3	5,872	25.0	6,124	25.4	6,766	24.4	6,821	23.7	785,699	8.68
Monastir-S	3,581	14.5	3,524	15.0	3,887	16.1	4,749	17.2	4,891	17.0	621,832	7.87
Jerba-Z	5,443	22.1	5,416	23.0	5,692	23.6	6,443	23.3	7,166	24.9	1,037,072	6.91
G-Tozeur	748	3.0	699	3.0	755	3.1	864	3.1	932	3.2	718,507	1.30
Bizerte-B	187	0.8	152	0.6	159	0.7	167	0.6	176	0.6	24,573	7.18
Tabarka-A	268	1.1	270	1.1	227	0.9	268	1.0	271	0.9	46,099	5.88
Total	24,681	100.0	23,514	100.0	24,130	100.0	27,684	100.0	28,788	100.0	4,646,670	6.20

ALS: Average Length of Stay

Source: ONTT, Le Tourisme Tunisien en Chifferes

(2) Geographical Distribution of Visitor Stay by Source Market

The Study Team subsequently analyzed the geographical distribution of visitor stay according to the source market. The following Figures A4.2.2 show the results for the major and emerging source markets of Tunisian tourism: Germany, France, Italy, the UK, Algeria, Libya, East European countries, Spain, the USA and Japan. And Table A4.2.4 shows the comparison of visitor-nights in 1994 and in 1998 for the above source markets except for the two Maghreb countries.

The figures and table indicate different preferences or behavior among the source markets. This difference in visitor stay may be due to various factors of visitors. The Study Team will analyze these factors later in this Chapter.

Major characteristics observed for each source market are:

a) Germany

- All of the four major beach regions, Sousse-K, Jerba-Z, N-Hammamet and Monstir-S are almost equally visited,
- Germans stay more in Tabarka-A region than other European visitors do, and
- The majority stays at one fixed place and perhaps do not make a lot of excursions.

b) France

- Among beach regions, N-Hammamet and Jerba-Z are the most visited,

- Fewer visits in Sousse-K,
- Large number of visitors in G-Tozeur (Sahara region), and
- Relatively many itinerant visitors.

c) Italy

- Among beach regions, Jerba-Z is the most visited, and
- The majority stays at one fixed place.

d) UK

- Sousse-K region is the most visited, and
- The majority stay at one fixed place.

e) Algeria

- The total number of hotel registrations is one third of visitor arrivals, and the majority do not stay in hotels.
- Concentration in Tunis-Z region is probably because of the business nature of their visits.

f) Libya

- Few visitors stay in hotels,
- Concentration in Tunis-Z and Jerba-Z regions probably because of their business visits and transit.

g) Eastern Europe

- Among beach regions, N-Hammamet and Sousse-K are the most visited, followed by Monastir-S and Jerba-Z regions, and
- The majority stay at one fixed place.

h) Spain

- Sousse-K and G-Tozeur regions are most visited, and
- The majority are itinerant visitors.

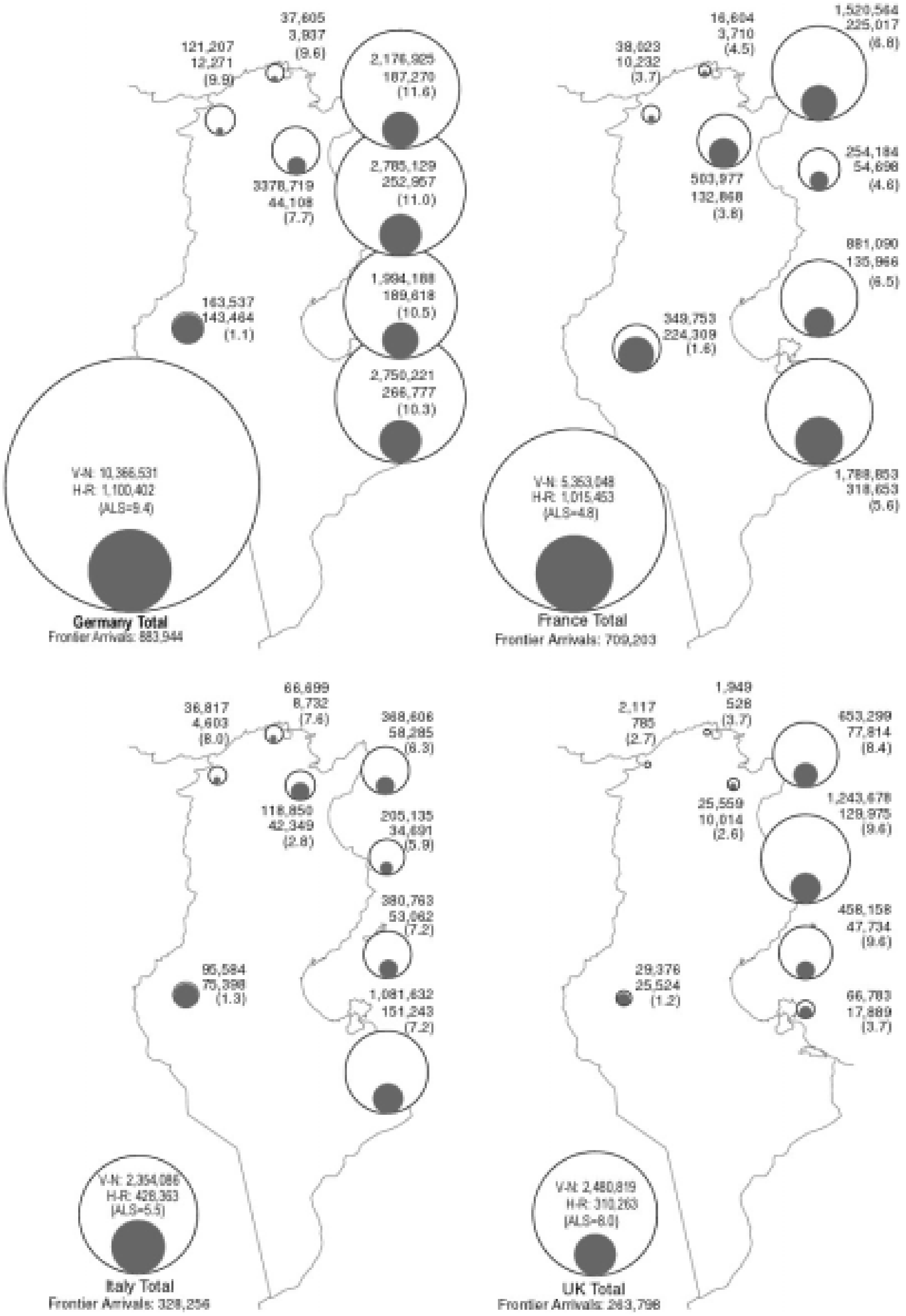
i) USA

- N-Hammamet and Monastir-S regions are the most visited, relatively many stay in G-Tozeur region, and
- The total number of visitors is comparatively very small.

j) Japan

- Sousse-K, Jerba-Z and G-Tozeur regions are equally visited,
- The majority are itinerant visitors.

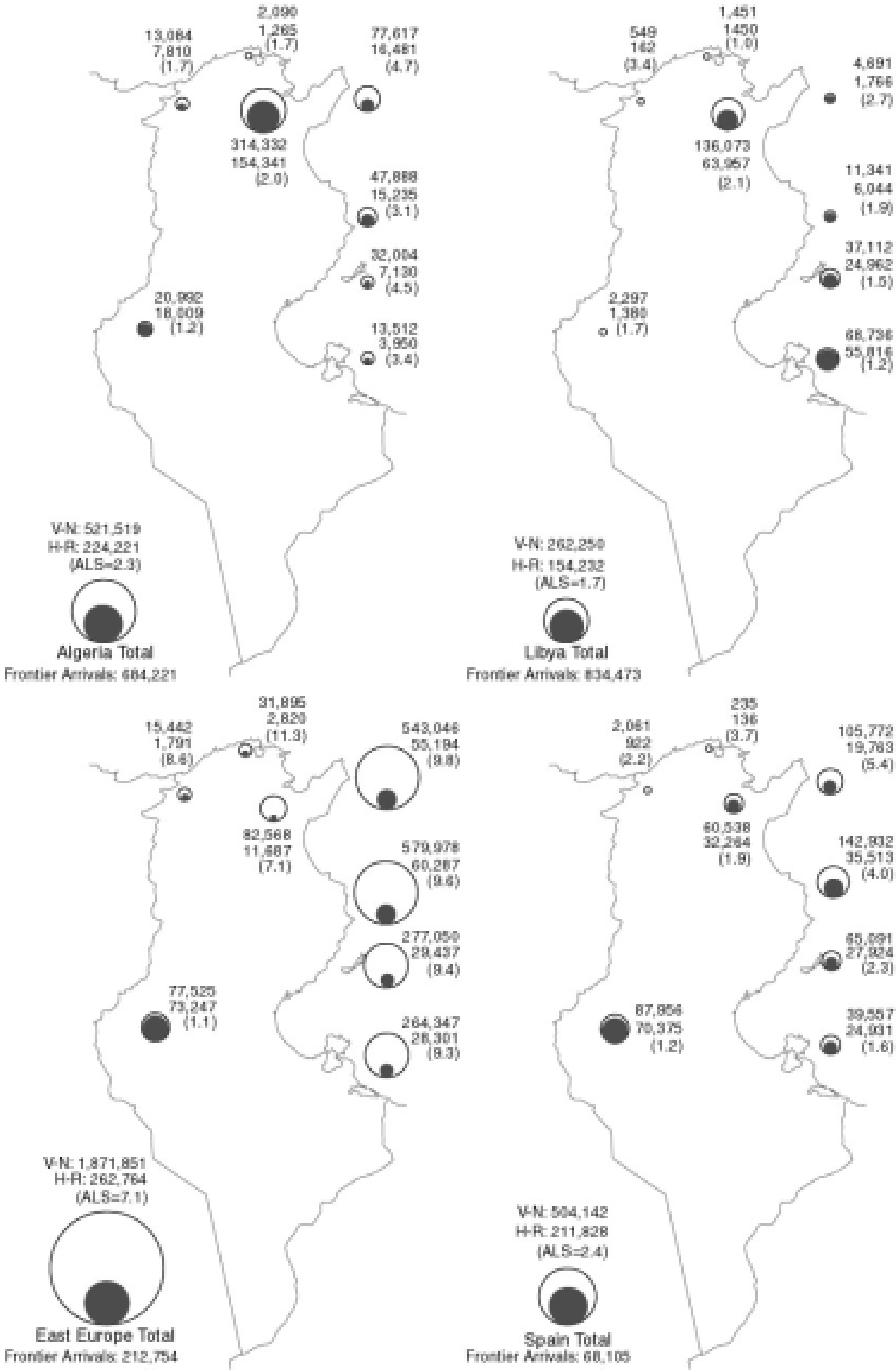
Figure A4.2.2 Geographical Distribution of Visitor Stays 1998 (1/3)



Note: H-R: hotel registration, V-N: visitor night, ALS: average length of stay

Source: ONTT, Le Tourisme Tunisien en Chifferes, 1998, JICA Study Team

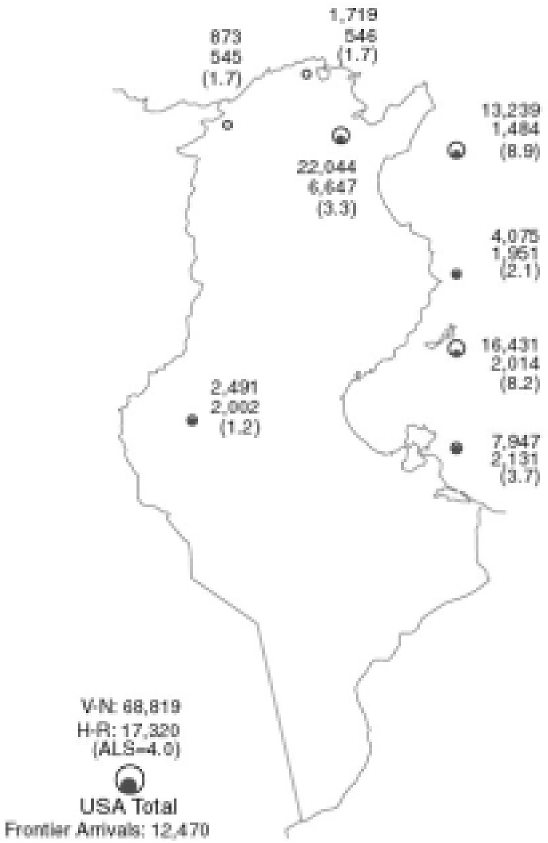
Figure A4.2.2 Geographical Distribution of Visitor Stays 1998 (2/3)



Note: H-R: hotel registration, V-N: visitor night, ALS: average length of stay

Source: ONTT, Le Tourisme Tunisien en Chifferes, 1998, JICA Study Team

Figure A4.2.2 Geographical Distribution of Visitor Stays 1998 (3/3)



Note: H-R: hotel registration, V-N: visitor night, ALS: average length of stay

Source: ONTT, Le Tourisme Tunisien en Chifferes, 1998, JICA Study Team

Table A4.2.4 Visitor-Nights by Tourism Region and Market in 1994 and 1998

	Tunis-Z		N-Hammamet		Sousse-K		Monastir-S	
	1994	1998	1994	1998	1994	1998	1994	1998
French	345,277	503,977	1,019,861	1,520,564	261,433	254,184	805,243	881,090
German	415,892	337,719	2,779,021	2,176,925	2,970,397	2,785,129	1,384,210	1,994,188
English	26,973	25,559	1,141,358	653,299	827,862	1,243,678	610,315	458,058
Italian	108,046	118,850	418,255	368,606	189,985	205,135	235,914	380,763
Spanish	43,861	60,538	88,741	105,772	86,784	142,932	36,991	65,091
American	23,384	22,044	8,102	13,239	14,384	4,075	6,187	16,431
Japanese	9,555	15,224	1,351	1,866	3,210	7,379	1,227	2,114
TOTAL	1,857,038	2,010,596	6,596,429	6,519,680	6,000,499	6,820,522	3,580,933	4,890,886

	Jerba-Z		G-Tozeur		Bizerte-B		Tabarka-A	
	1994	1998	1994	1998	1994	1998	1994	1998
French	1,152,094	1,788,853	185,176	349,753	17,004	16,604	23,251	38,023
German	2,678,935	2,750,221	259,467	163,537	49,098	37,605	152,527	121,207
English	38,575	66,783	24,767	29,376	1,469	1,949	988	2,117
Italian	730,391	1,081,632	107,033	95,584	63,627	66,699	27,668	36,817
Spanish	25,602	39,557	52,267	87,956	409	235	1,645	2,061
American	3,959	7,947	2,521	2,491	5,024	1,719	1,485	873
Japanese	2,799	6,246	1,984	6,064	506	105	94	493
TOTAL	5,443,373	7,166,162	747,835	932,309	187,199	176,393	267,909	271,075

Source: ONTT, Le Tourisme Tunisien en Chifferes

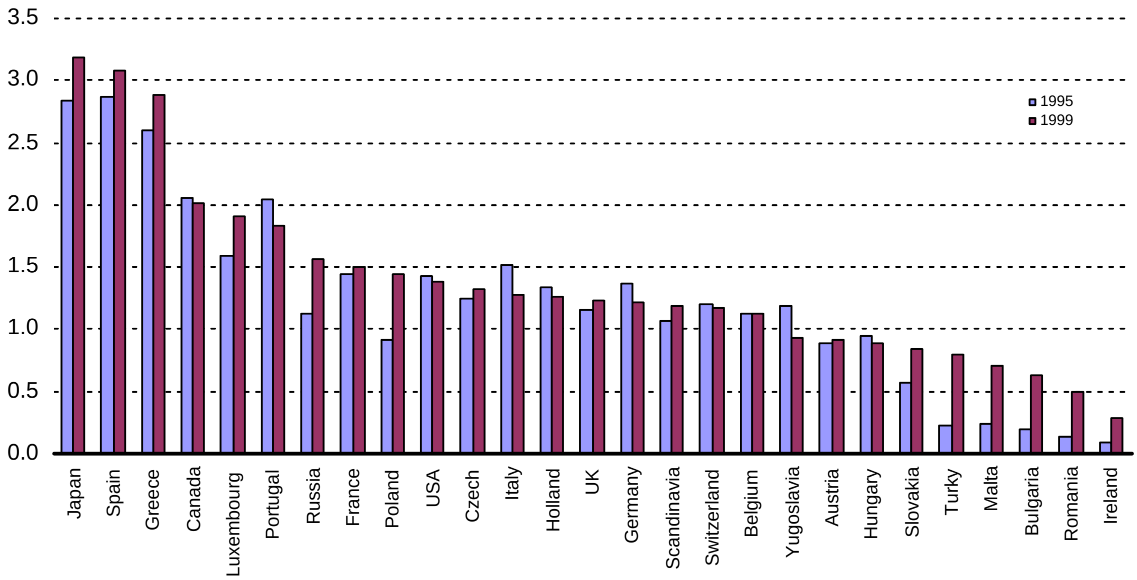
A4.2.4 Mobility of Visitor Stay

According to the preceding Figure A4.2.2, the stability or mobility of visitors inside Tunisian was calculated. This tendency varies among source markets and can be defined as the “Mobility Coefficient (MC)” of visitors:

Mobility Coefficient (MC)
=[Total number of visitors registered in hotels] / [Number of visitor arrivals]

For example, as for German visitors, the number of visitors registered in hotels in 1999 was 1,258 thousand, while the number of German visitors entering Tunisia was 1,036 thousand, then MC is calculated at 1.2. The Study Team carried out this calculation for all source countries for the case of 1995 and 1999, and the result is shown in Figure A4.2.3.

Figure A4.2.3 Mobility of Stay by Selected Source Countries



Source: ONTT, Le Tourisme Tunisien en Chifferes, 1995 and 1999

This coefficient, to some extent, reflects the characteristics or types of visitor activities in Tunis, which will be later utilized for the analytical purpose.

A4.2.5 Seasonal Fluctuation of Visitor Stay

Figure A4.2.4 shows the seasonal fluctuation of the number of visitors registered in hotels according to the ONTT tourism regions.

In general, August is the highest season and January is the lowest. However, with careful examination, the eight tourism regions may be classified into four different groups in terms of seasonal demand patterns:

a) N-Hamammet, Sousse-K, Jerba-Z and Monastir-S regions

This group exhibits very high concentration in summer between July and September. June and October are the “shoulder” season. There is another small peak in April. Jerba-Z region, which is the southern most region among them, receives the most visitors at this small peak season. Their difference in number of visitors in the highest month and in the lowest vary between 3.2 to 4.5 times.

Monastir-S region, which is also located in the south, receives the least number of visitors through the year. This may be due to the region’s characteristics which will be clarified in the following Chapter.

It should be noted that, even in the winter, each of these region receives much more visitors than the other regions in summer except for the case of Tunis-Z region.

b) Tunis-Z region

Tunisi-Z region exposes similar tendency as the above group, however the concentration in summer is absolutely lesser. The monthly numbers of visitors through May to October seem relatively stable.

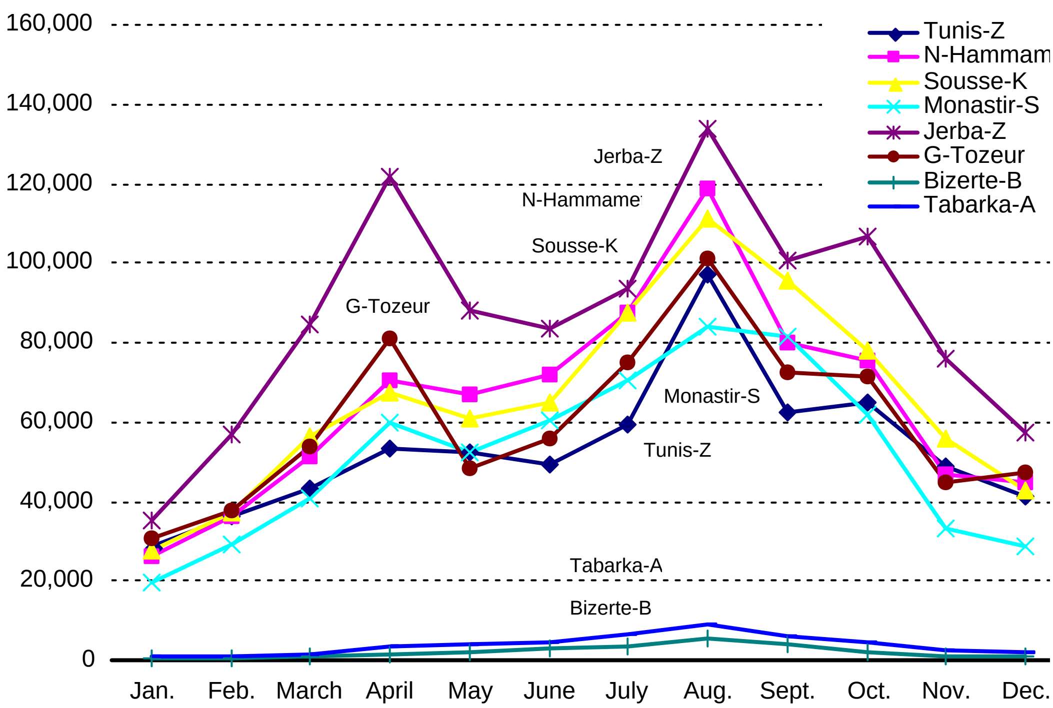
c) G-Tozeur region

G-Tozeur region was the only tourism region located entirely inland before the new partition was applied in 2000. Low season is between May and July

d) Bizerte-B and Tabarka-A regions

These regions are located in the north and are rather newly developed areas for tourism. The number of visitors to these regions is still small throughout the year. Especially, very low volume is observed in winter.

Figure A4.2.4 Seasonality of Visitors by Tourism Region in 1998



Source: ONTT, Le Tourisme Tunisien en Chifferes, 1998

A4.3 PURPOSE OF VISIT

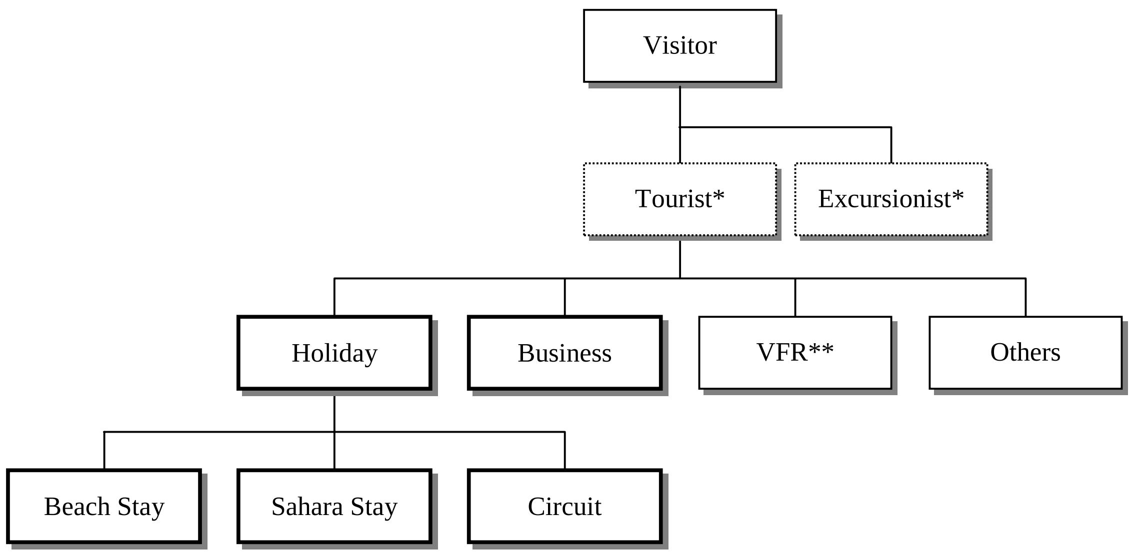
A4.3.1 Types of Visitors

In order to get a more complete understanding of the dynamics of tourism in Tunisia, the Study Team tries to examine the different types of visitors and their composition. All the findings in the precedent section related to the visitors' behavior: place of stay, length of stay, season, will help understand the demand structure of Tunisian tourism.

(1) Definition of Visitor Types

Figure A4.3.1 shows key behavioral definitions for which statistics are typically produced by many national tourism organizations. The Study Team added a small modification on the ordinary definition, taking into consideration the specific characteristics of Tunisian tourism.

Figure A4.3.1 Visitor Types in Tunisia



Note *: The classification of "Tourist" who stays longer than 24 hours and "Excursionist" who stays shorter than 24 hours, which is defined by WTO, can not be applied in Tunisia due to the lack of information.

Note **: VFR means visitors "visiting friends and relatives".

Note ***: Squares with thick lines are generally conceived as higher spending visitors.

Source: WTO, JICA Study Team

(2) Analysis of the Visitor Types

The Study Team conducted the structural analysis of the visitors to Tunisia taking into consideration the behavioral characteristics of each visitor type and by applying the following methodology and assumptions:

a) VFR Visitors and Others

For certain nationalities, if the total number of visitors registered in hotels is smaller than the visitor arrivals to Tunisia, the number of visitors without hotel registration is regarded as “VFR” including “Others” category. This case corresponds to the neighboring Maghreb countries which is understandable, and to some East Mediterranean countries.

b) Business Visitors

All “Business” visitors are assumed to enter Tunisia via Tunis and stay at least one night in Tunis. This is due to the difficulty to distinguish visitors of business purpose in other tourism regions. In these cases, the number of visitors of “Business” was defined by applying the following assumed percentages to the number of visitors registered in hotels in Tunis-Zaghouan region, taking into account the level of business relationship between Tunisia and the subject country.

- 20% for Maghreb countries and Mediterranean countries,
- 10% for European countries, and
- 5% for other countries.

c) Holiday-Beach

Visitors under this category are assumed to stay at one fixed place in the tourism region where beach is available, except for limited excursions. The respective mobility coefficient (MC) was considered to determine the percentage of visitors under this category.

- MC < 1.1: All visitors except above two cases (VFR and Business) are classified as “Holiday-Beach” or “Holiday-Sahara” (Holiday-Sahara will be reduced according to the method explained later);
- MC > 3.0: All visitors are regarded as “Holiday-Circuit” visitors;
- 1.1 < MC <3.0: the number of visitors under this category are decided proportionally.

The application of 1.1 and 3.0 for the above definition was decided taking into account the following:

- 1.1: Even “Holiday-Beach” visitors make limited excursions to various tourist sites accompanied by one night stop. The ratio 0.1 was added to include this phenomenon. This ratio is decreased to be appropriate in view of the results of tourist interview surveys carried out under the Study;
- 3.0: As explained later, “Holiday-Circuit” visitors are assumed to stay at least three places in order to visit different tourist sites.

d) Holiday-Sahara

Among the visitors classified as “Holiday-Beach” or “Holiday-Sahara” according to the above operation, 13.8% of the number of visitors registered in hotels in Gafsa-Tozeur region for each source country was assumed as "Holiday-Sahara" type. This percentage was also derived from the results of the tourist interview survey, and the ratio of visitors staying more than 4 nights. The rest was considered as excursion visitors of "Holiday-Beach" type or "Holiday-Circuit" type.

e) Holiday-Circuit

The "Holiday-Circuit" visitors are assumed to stay at more than three locations. Therefore, visitors having a MC larger than 3.0 are regarded as "Holiday-Circuit" except for "Business" type that is derived from the definition above.

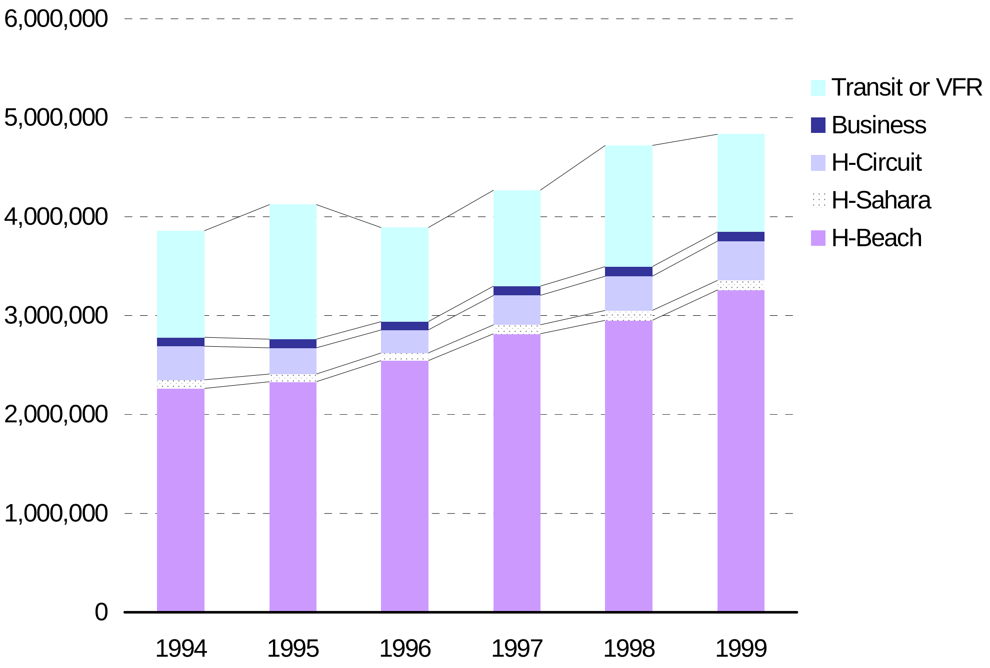
A4.3.2 Visitor Arrivals by Estimated Purpose

The result of this analysis is shown in Figure A4.3.2 and Table A4.3.1. Assuming this result represents roughly the real structure of tourists visiting Tunisia, the following observations were identified:

- "Holiday-Beach" is the dominant group with approximately 63% of total visitors through 1994 to 1999,
- "VFR" (including "Others") shares approximately 25% of total visitors and is very common among visitors from neighboring Maghreb countries,
- "Holiday-Sahara" shares approximately 2% of total visitors, which is still very small,
- "Holiday-Circuit" shares approximately 8% of total visitors, which is steadily increasing.

In order for the future tourism development in Tunisia to meet the expectation of visitors, it is essential to understand how the visitors spend their stay, what their purposes are and what they expect to do.

Figure A4.3.2 Estimated Trend of Visitor Arrivals by Purpose



Source: JICA Study Team

Table A4.3.1 Estimated Number of Visitor by Purpose

	H-Beach		H-Sahara		H-Circuit		Business		Transit or VFR		TOTAL
1994	2,261	58.7%	87	2.3%	339	8.8%	95	2.5%	1,074,	27.9%	3,856
1995	2,329	56.5%	77	1.9%	265	6.4%	87	2.1%	1,363	33.1%	4,120
1996	2,543	65.5%	76	2.0%	235	6.0%	86	2.2%	950	24.4%	3,885
1997	2,816	66.0%	92	2.1%	296	6.9%	94	2.2%	969	22.7%	4,263
1998	2,953	62.6%	99	2.1%	344	7.3%	98	2.1%	1,224	25.9%	4,718
1999	3,257	67.4%	99	2.1%	395	8.2%	98	2.0%	984	20.4%	4,832
Av. %	62.9%		2.1%		7.3%		2.2%		25.6%-		100%
AAGR	+7.57%		+2.57%		+3.12%		+0.63%		-1.75%		-

Unit: thousand Visitors

AAGR: Average Annual Growth Rate

Source: JICA Study Team

A4.4 TYPES OF EUROPEAN OUTBOUND TRAVELERS

Outbound international travelers from Europe, by far the most important source region for Tunisian tourism, were examined in terms of the types of travelers, thereby enabling the comparison of visitors to Tunisia with the global picture of European travelers.

Table 4.4.1 shows the estimates of outbound international travelers from major European countries by purpose of trip. These seven countries account for 82% of all the European visitors to Tunisia in 1999, and 79% of all the visitors to Tunisia excluding those from the Maghreb countries.

Table A4.4.1 Estimated Outbound Travelers from Major European Countries

Country	Total outbound travelers		Holiday		Business		Other types of leisure	
	(thousand)	(%)	(thousand)	(%)	(thousand)	(%)	(thousand)	(%)
Germany	78,932	100%	63,146	80%	8,683	11%	7,104	9%
France	23,628	100%	15,122	64%	2,835	12%	5,671	24%
Italy	18,588	100%	13,569	73%	3,346	18%	1,673	9%
UK	52,726	100%	40,072	76%	7,909	15%	4,745	9%
Belgium	12,734	100%	10,442	82%	1,146	9%	1,146	9%
Netherlands	24,848	100%	20,624	83%	2,485	10%	1,739	7%
Spain	13,685	100%	8,485	62%	3,421	25%	1,779	13%
Total	225,141	100%	171,459	76%	29,825	13%	23,857	11%

Note: The number of travelers by purpose was calculated from the number of total outbound travelers and the proportion by purpose of trip. The data by purpose of trip cited in the WTO publication below are originally from IPK International – World Travel Monitor 1998.

Source: WTO, Tourism Generating Markets, 1999; WTO database.

Table A4.4.2 shows the size of outbound travelers from these European countries by type of holiday. While the composition varies across countries, it is important to note that travelers for city holiday and touring (as well as those for sun and beach) hold a significant portion of all the European holidaymakers. Touring is considered to be, for the most part, cultural circuit touring and touring for nature discovery.

Table A4.4.2 Types of Holiday for Outbound Tourists from Major European Countries

Country	Sun + beach	City holiday	Touring	Country-side	Mountain	Event	Cruise	Sub-total
Germany	32%	16%	13%	11%	-	-	-	72%
France	26%	25%	32%	-	-	-	4%	87%
Italy	25%	11%	41%	-	-	5%	-	82%
UK	46%	12%	15%	9%	-	-	-	82%
Belgium	35%	16%	13%	17%	-	-	-	81%
Netherlands	27%	10%	13%	10%	13%	-	-	73%
Spain	20%	33%	16%	-	-	9%	-	78%

Note: in % of travelers for holiday. These data cited in the WTO publication below are originally from IPK International – World Travel Monitor 1998. These are the proportions of "main" types of holiday, thus not adding up to 100%, with the rest being various other types.

Source: WTO, Tourism Generating Markets, 1999

Based on the statistics above, the numbers of outbound travelers by type of holiday were estimated as shown in Table A4.4.3. The total for these countries indicates that the travelers for city holiday and touring combined are approximately equal to those for sun and beach. In addition, the number of travelers staying in the countryside abroad is fairly large, about 25% of those for sun and beach.

Table A4.4.3 Estimated Numbers of Outbound Tourists from Major European Countries

Country	Sun + beach	City holiday	Touring	Country-side	Mountain	Event	Cruise	Sub-total
Germany	20,207	10,103	8,209	6,946	-	-	-	45,465
France	3,932	3,780	4,839	-	-	-	605	13,156
Italy	3,392	1,493	5,563	-	-	678	-	11,127
UK	18,433	4,809	6,011	3,606	-	-	-	32,859
Belgium	3,655	1,671	1,357	1,775	-	-	-	8,458
Netherlands	5,568	2,062	2,681	2,062	2,681	-	-	15,055
Spain	1,697	2,800	1,358	-	-	764	-	6,618
Total	56,884	26,718	30,018	14,390	2,681	1,442	605	132,738

Note: These figures were calculated from the numbers of outbound travelers for holiday and the proportions by type of holiday, both shown in the previous tables.

Source: WTO, Tourism Generating Markets, 1999; WTO database

The estimated composition of outbound travelers from these European countries is summarized in Table A4.4.4.

Table A4.4.4 Summary of Outbound Travelers from Major European Countries

Holiday						Business	Other types of leisure
Sun + Beach	City holiday	Touring	Countryside	All others	Total		
25%	12%	13%	6%	19%	76%	13%	11%

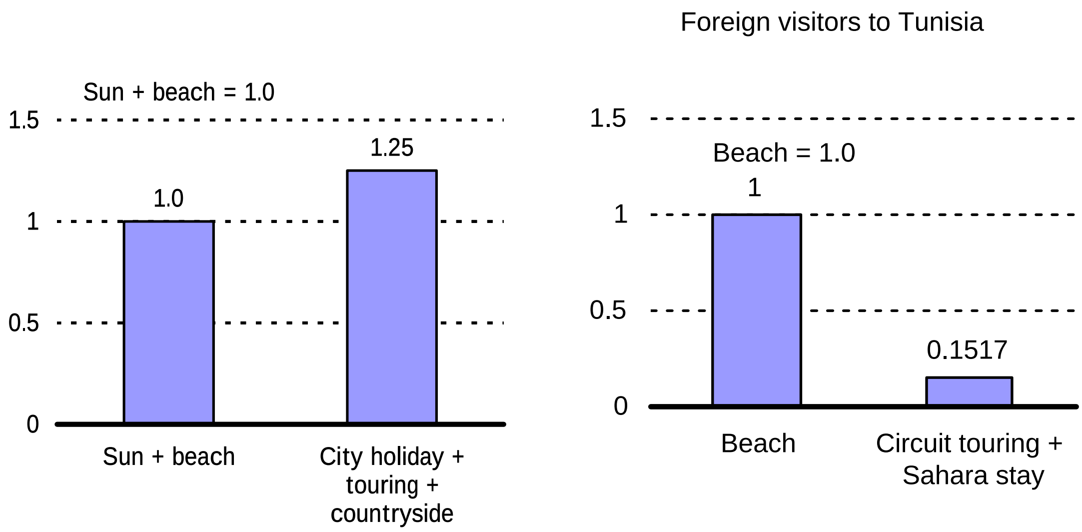
Note: These percentages were obtained from the statistics on the seven European countries shown in the previous tables.

Source: WTO, Tourism Generating Markets, 1999; WTO database.

In sum, it is true that the type of holiday most preferred by Europeans is sun and beach. At the same time, it is important to note that more tourists than those for sun and beach are traveling abroad for discovering the world (e.g., city discovery, cultural circuit touring, nature discovery, staying in the countryside, etc.).

This provides a significant implication for the future of Tunisian tourism that currently focuses heavily on beach products. Figure A4.4.1 highlights the difference in the types of tourists between European outbound travelers and foreign visitors to Tunisia.

Figure A4.4.1 Comparison of European Outbound Travelers and Visitors to Tunisia



Source: JICA Study Team, WTO, ONTT

A4.5 RESULT OF TOURIST SURVEY

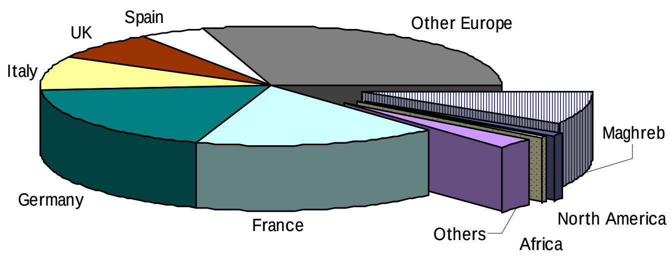
The questionnaire survey of tourists was conducted in July and August 2000 at the departure lounges of airports of Tunis, Jerba, Monastir, and Tozeur. A total of 3,601 effective questionnaires were collected.

(1) Respondents Attributes

Male and female share was almost equal (48% and 50% respectively). Their age groups were 26-35 (31%), under 25 (30%), and 36-45 (21%).

Europeans were dominant as the (86%), with Germany (19%), France (17%), Italy (9%), UK (7%) and Spain (5%).

Figure A4.5.1 Composition of Nationality



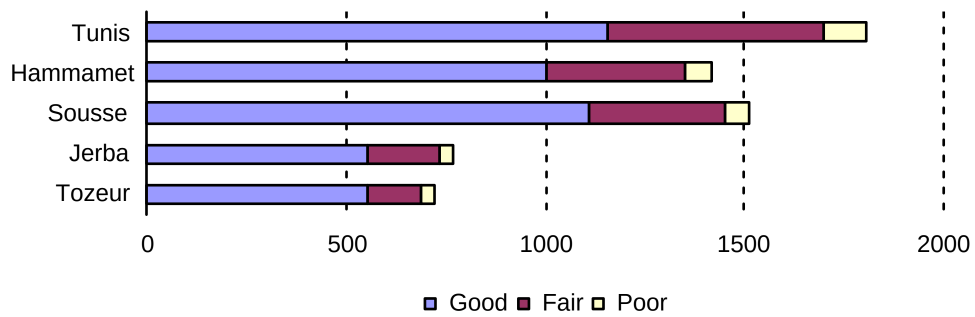
Source: JICA Tourist Survey

(2) Natural and Cultural Tourism Development

a) Tourist Regions

Tunis was visited by a half of respondents. Sousse and Hammamet were about 40%. Much smaller number visited Tozeur and Jerba. A quality rating of "Good" was reported in Tozeur (77%), Sousse (73%), Jerba (72%), and Hammamet (71%).

Figure A4.5.2 Evaluation of Visited Tourism Region



Source: JICA Tourist Survey

b) Cultural Sites

The cultural sites in question were Bardo Museum, Carthage and Sidi Bou Said, Dougga, El Jem, Medinas, Kairouan, Douz, Tozeur, and others.

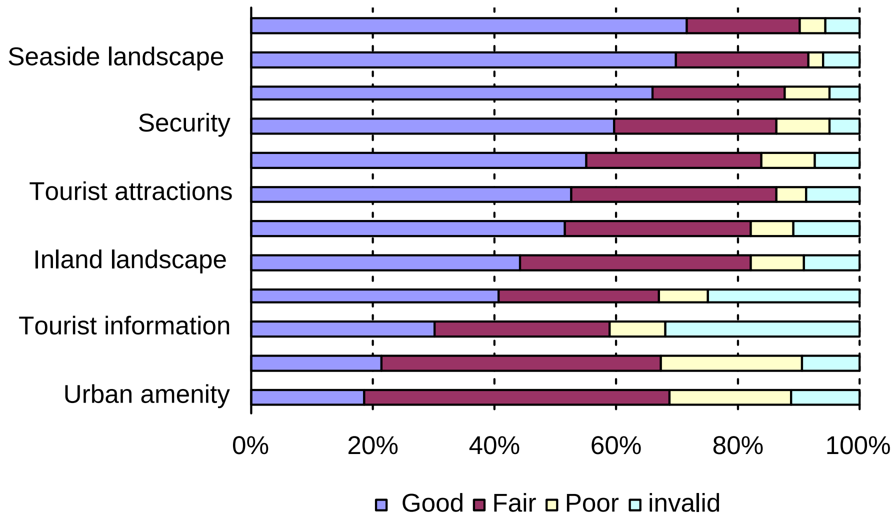
Medinas, Carthage and Sidi Bou Said were visited by about a half of the respondents. These sites are favorable to other sites in terms of their location near Tunis. Inland sites such as El Jem, Kairouan, Douz, Tozeur were visited by much smaller number of respondents than Tunis regions' sites.

A "Good" was given by majority of visitors (74%). The rating for "Interpretation" and "Signage/Facility" was low at 4.8%. Only French tourists gave relatively "Good" for "Signage/Facility" than others due to the widely used French.

c) Rating of Tunisian Tourism

A "Good" rating was given for two main factors of Tunisian tourism; "Seaside landscape (72%)" and "Security (62%). "Good" decreases in the rating for "Custom / Immigration (55%)", "Tourist Attraction (53%)", and "Tourist Transport (52%)". Most alarming was the very low rating for "Urban Amenity (21%) and "Sanitation Condition (18%)".

Figure A4.5.3 Rating of Tunisian Tourism



Source: JICA Tourist Survey

d) Satisfaction

28% of respondents answered "Very Satisfied" and 53% "Satisfied". Most alarming was a rather high percentage of "Very Dissatisfied (6%)" and "Dissatisfied (11%)".

(3) Service Industry Management

a) Accommodation

More than a half of respondents answered "Good" for most of items. "Rooms" received the relatively higher rating (59%), followed by the "Service (55%)" and "Facilities (51%)", while "Meals" received lowest rating (49%).

b) Restaurants and Souvenirs

Among 62% of respondents who tried the restaurants outside hotels, majority of them answered that "Food", "Price", and "Waiter/Waitress" were "Good". "Poor" rating was highest for "Hygiene Condition (15%)", with "Fair (37%) and "Good (48%)".

The Majority of respondents (83%) purchased souvenirs in Tunisia. The most popular souvenir was the "Handicraft of Brass, Copper, and Ceramic (58%)". "Jewelry", "Handicraft of Fabric", and "Handicraft of Wood", were purchased by around 30% of the respondents. More than a half of purchasing respondents answered "Quality" and "Price" were "Good". Meanwhile, the rating for "Shop attendant" was low at only 38%.

(4) Market Segmentation and Promotion

a) Tour type

More than half respondents (60%) visited Tunisia on package tours. Among the major European countries, more than 80% of Spanish and British used package tours. This was followed by 75% of Italian and 68% of German tourists. Only 38% of French tourists were on packages due most probably to the close French / Tunisian cultural and economic relations.

b) Purpose

"Holiday" dominates at 86%. The rest was divided into less than 10% for other purposes such as "Business", "Official", "Holiday-business combined", and "Visiting friends or relatives".

c) Traveling companion

"With family" tops the list as 36% followed by "With spouse" at 25%, and "With friends" at 21%.

d) Number of nights

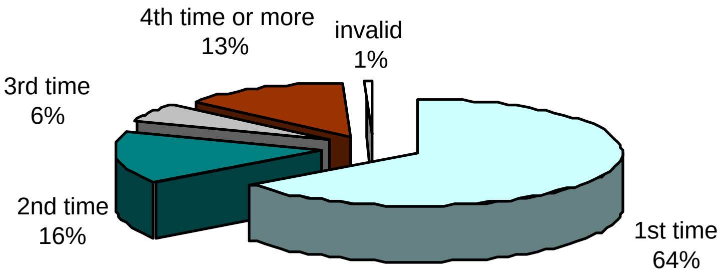
"7 to 14 nights" occupies majority at 64%, "Less than 7 nights" at 18% and "More than 14 nights" at 15%.

e) Frequency of Tunisia visit

The first time visitors were the majority of respondents (65%). 16% of respondents are "2nd time", 13% for "4th time or more", and 7% for "3rd time" visitors. The first time visitors dominated among Spanish tourists

(91%) and British tourists (75%). While, a half of the French tourists were repeat visitors and 22% of them visited Tunisia more than 4 times, attesting to the dominance of business / professional visitors.

Figure A4.5.4 Frequency of Visit

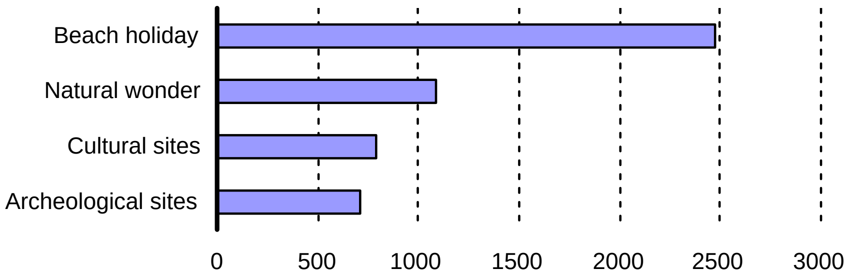


Source: JICA Tourist Survey

f) Reasons of choosing Tunisia

"Beach holiday" hold a majority share of 69%, followed by "Natural Wonder (30%)", "Cultural sites (22%), and "Archeological sites (20%)".

Figure A4.5.5 Reasons of Choosing Tunisia

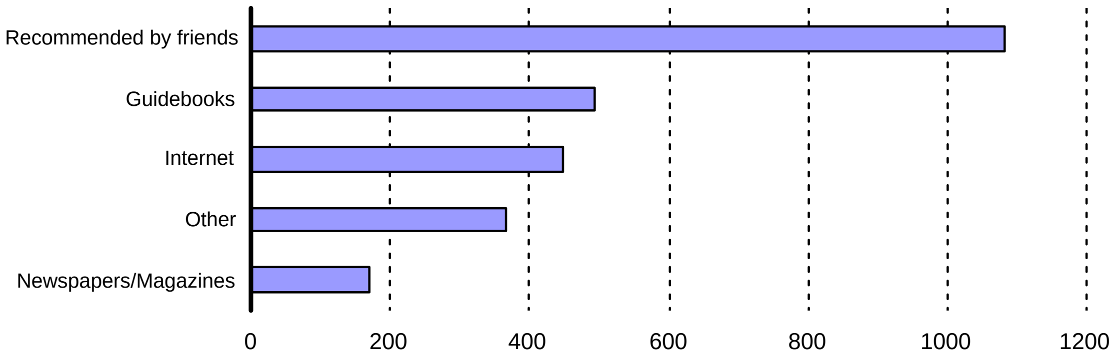


Source: JICA Tourist Survey

g) Information Sources

The most frequently referred source was “Tour Brochures (51%)”, followed by “Recommended by friends (30%)”. Other sources such as “Guidebooks”, “Internet”, and “Newspapers/Magazines” remained low. As the majority of respondents were on the package tour, the tour brochures took the significant role in information dissemination.

Figure A4.5.6 Information Source



Source: JICA Tourist Survey

h) Information Needed

Higher needs for information is registered for “Tourists sites (31%)” and “City amusement (25%)”. These are followed by “Hotels (20%)”, “Tunisian Culture (17%)”, “Transport (12%)”, “Maps (11%), and “Restaurants (11%)”.

A5 TOURISM RESOURCES AND PRODUCTS

In this section the key types of resources and products that serve as attractions for international tourism are reviewed. The focus is on the products that attract foreign visitors to Tunisia for their enjoyment. They are discussed in three broad groups, seaside tourism, cultural tourism and MICE tourism. Facilities operating mainly for recreational purposes of the local population are not reviewed if they are not significant for international tourism.

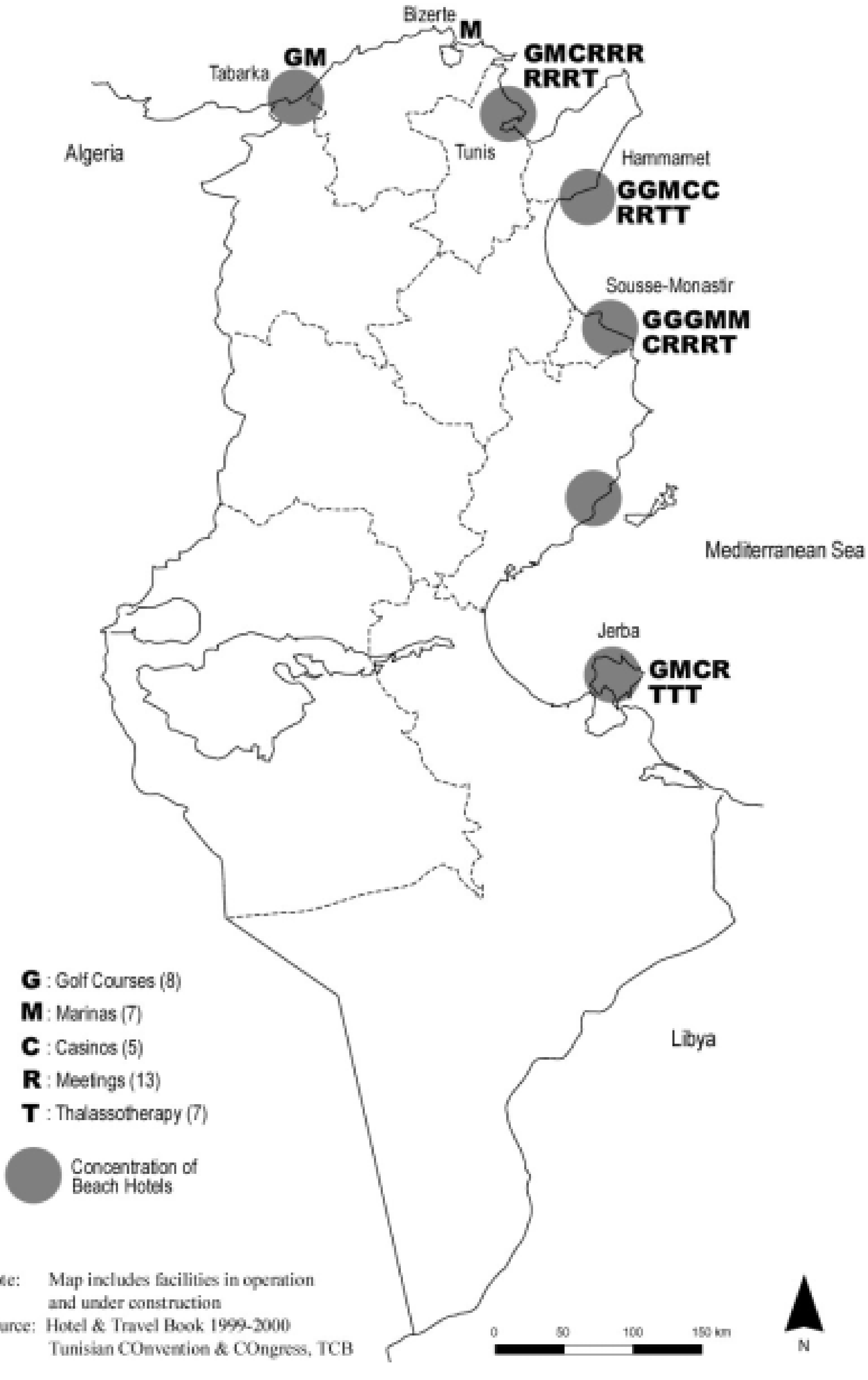
A5.1 SEASIDE TOURISM

The number one product that the country offers today is the beach holiday product. The key resources for it include the coastline, the beaches and the mild climate. As a result Tunisia's tourism infrastructure especially the hotel capacity, is heavily concentrated along the coastlines. This is apparent from the map of the selected resources and products (Figure A5.1.1 below) depicting the key resources including golf courses, marinas, casinos, facilities for meetings and seawater therapy centers. In general, there is a fairly good variety of both cultural and natural resources appealing to foreign tourists having different preferences for activities. Another observation is that there is significant foreign ownership and involvement in the management of some of the resources such as hotels, spas, golf courses and casinos, which is a positive factor in raising the quality of the tourism products, essential for the industry's *globalization*.

A5.1.1 Coastal Environment

The coastline of Tunisia, along with its mild environment, constitutes its key resource for tourism and the basis of its core product, the beach holiday. Of the total of 1,300 km less than 200 km have been developed for tourism purposes, which is a logical and efficient pattern of development. Other sections of this report will detail the geographic distribution of the 100,000-room capacity across the country, primarily along this coastline. The key pockets of hotel development are clearly Tunis-Z, N-Hammamet, Monastir-S (Sahel Metropolis), and Jerba-Z regions. At no point does the pattern of development extend on a continuous basis very far inward from the coastline. Most of the country's infrastructure of facilities for entertainment and activities is similarly focused in these same areas. Key types of products are reviewed below.

Figure A5.1.1 Map of Selected Products for International Tourism



Note: Map includes facilities in operation and under construction
Source: Hotel & Travel Book 1999-2000
Tunisian COnvention & COngress, TCB

A5.1.2 Golf Courses

There are 8 courses in operation, located in Tabarka, Tunis, 2 in Hammamet, Kantaoui, 2 in Monastir and one in Jerba. They are privately operated. Some have been designed by well-known foreign designers, and some offer seaside views, a feature highly appealing to foreigners. Golfing is a major secondary activity for visitors on beach holidays, on business or attending meetings or other types of events. Golfing is promoted as a major recreational activity for visitors of middle and older ages, and some of the courses offer circuits at different levels of difficulty. Tunisia will attract more serious golfers on golfing packages as it creates more courses in close proximity enabling play at several nearby courses. This is now possible in the Hammamet-Monastir area where five clubs are located within a maximum 75-minute drive of one another.

Table A5.1.1 Key Golf Courses

Tabarka Golf Course	Tabarka-Montaza	18+9 holes, sea views
Golf de Carthage	Tunis-La Soukra	18 holes, inland site
Citrus Golf	Hammamet	(18+18+9) 45 holes, inland site
Yasmine Golf Course	Hammamet	18+9 holes, inland site, Magic Life management
El Kantaoui	Hammam-Sousse	27 holes (9-hole addition) seaside
Flamingo Golf	Monastir	18 holes, sea views
Palm Links	Monastir-Edkhila	18+9 holes, inland site
Jerba Golf Club	Midoun Jerba	27 holes, seaside

Source: Hotel and Travel Book 1999-2000; Tunisia Convention and Congress

A5.1.3 Marinas for Pleasure Boating

Table A5.1.2 lists existing marinas for pleasure boats and yachts, located in Tabarka, Bizerte, Sidi Bou Said, Kantaoui and Monastir. These ports handle yachts and boats for personal use as well as commercial vessels for rent and used for excursions along the coastlines, to islands and for underwater diving or fishing.

Marinas can play a crucial role of recreational amenity adding value to the surrounding urban environment as a favored site for recreational and leisure activities for both Tunisians and foreign tourists. The marina at Sidi Bou Said being the only one in the Tunis-Z region, is reported to be saturated with its nearly 400 berths heavily used. Port El Kantaoui was developed from its design as an integrated port and urban project and is believed to be an example of successful new town planning with a marina environment.

There is some use of these marinas by boat-owners visiting by sea from Italy and France on individual trips and in competitive sailing regattas. At a recent seminar on boating the observation was made that the clearing process for the vessels and the persons on them of the Tunisian authorities is burdensome and needs to be simplified if Tunisia is to encourage pleasure boating by foreign operators.

Table A5.1.2 Key Marinas in Operation or Under Construction

Cap Tabarka, Montazah Tabarka	100 berths
Cap Bizerte, Bizerte	120 berths
Sidi Bou Said, north of Tunis	380 berths
Port El Kantaoui, north of Hammam-Sousse	360 berths
Cap Monastir, Monastir	400 berths, full service
Yasmin Hammamet	(under construction)
Jerba Houmt Souk	(under construction)

Source: Hotel & Travel Book 1999-2000; Tunisia Convention & Congress.

Full service marinas are being built at two of Tunisia top tourism resort areas, Hammamet South and Jerba. These are being integrated into urban environments and will function as strong urban amenities for relaxation and entertainment, serving as departure points for different kinds of marine activities.

There is also a possible strategy for Tunisia to promote its marina facilities to boat owners in France and Italy to visit Tunisia and even to store their boats for the winter season at costs far below costs in the French and Italian marinas. Proponents assert that this is a business opportunity for Tunisia's marinas, to serve as an interesting port-of-call for touring and fishing, and to serve as an inexpensive winter boat storage option. There is a need for harmonization of Tunisia's standards and procedures if it is to encourage growing volumes of pleasure boats and yachts from Europe.

A5.1.4 Casinos

Casino gambling is another complementary activity, a form of amusement, in which some foreign visitors will participate. It can serve as a complement to any kind of visit. At present there are two casinos in Hammamet and one in each of Sousse and Jerba (Table A5.1.3). The Tunis area will get one as soon as the Hotel Le Palace is completed in the hotel zone of Gammarth. Some foreign groups have been hired to manage the casinos based on their experience in other countries. Some of the units offer dining and entertainment facilities, and facilities for meetings and events unrelated to casino gambling.

Table A5.1.3 Casinos in Operation or Under Construction

Grand Casino de Hammamet Occidental Hammamet Hotel	Hammamet	Groupe Lucien Barrière
Cléopatra	Hammamet	Groupe International Cléopatra
Caraïbes	Sousse	500-seat theater
Pasino	Jerba	Groupe Partouche of France
Hôtel Le Palace	Gammarth (under construction)	Groupe International Cléopatra

Source: Tourisme Profession: Tunisia Convention and Congress.

The completion in late 2000 of the casino in the Hotel Le Palace in Gammarth will bring casino gambling to the Côtes de Carthage area one of the main concentrations of hotel capacity in the country. The opening of this casino will increase the offering of recreational activities available to tourists in the Greater

Tunis area and should represent a limited promotional benefit for tourism in that area.

A5.1.5 Thalassotherapy

Another activity that serves as an attractive complement to the basic products of Tunisia’s tourism is seawater therapy which includes not only seawater bathing and showering but also self improvement options such as massage, seaweed treatments, mud treatments, and other beauty and well-being services. Some French firms have developed elaborate programs for these kinds of services and are involved in operating some of the facilities in Tunisia. They tend to be high-cost, luxury services affordable for a tourist’s budget only, and these centers are located mainly in the upscale hotels. They are not government operated as this is a private sector activity. Over half of the centers are located in the Jerba-Z region. The following table lists the main centers for thalassotherapy.

Table A5.1.4 Key Centers for Thalassotherapy

Thalassoleil The Residence, Hôtel The Résidence	Gammarth
Bio Azur Thalasso, Hotel Royal Azur Et Solazur	Hammamet
Hotel Hasdrubal Palace, Hammamet Yasmine	Hammamet
Hotel Abu Nawas Boujaafar	Sousse
Athénée Thalasso, Hotel Athénée Thalasso	Jerba
Vital Center Thalgo Dar Jerba, 4 hotels	Jerba
Vital Center Thalgo Marina Beach	Jerba
Hasdrubal Thalassa	Jerba
Odyssée, Hotel Odyssée Resort	Zarzis
Yadis Jerba, Hotel Yadis Jerba	Jerba

Source: Hotel and Travel Book 1999-2000

A5.2 RESOURCES FOR CULTURAL TOURISM

This very broad category is used to refer to a range of man-made and natural resources of different kinds including:

- Archeological sites: Carthage, Utica, Dougga and Bulla Reggia are examples.
- Historic urban districts or Medinas: Tunis, Kairouan, Sousse and Tozeur are examples of Islamic urban developments in both coastal and desert environments.
- Museums: The Bardo, the museums of Carthage, El Jem and Sousse are examples.
- Berber sites: Mainly located in desert environments, Matmata, Chenini and the Ksour villages are examples.
- Desert life: oasis villages such as Chebika and Tamerza, barren landscapes and scenic fields of dunes.

Basic information about some of the identified locations is provided later in this section. The World Bank study described in section 2.4 has assessed many of the cultural resources thoroughly from the standpoint of international appeal and tourism. It is these resources that can enable Tunisian tourism to distinguish itself by providing unique, high quality, memorable experiences to tourists staying in beach hotels but seeking new, entertaining and even for some, educational experiences. There is great interest and curiosity in the civilizations of the desert environment, in the classical civilizations preceding Islam, in the Islamic culture, and even in the relatively recent French colonial period which also has left a definite imprint particularly in Tunis. The country offers an interesting mixture of cultural resources that contain fascinating aspects for foreign visitor.

The desert environment of Tunisia’s south holds a particularly powerful appeal for tourists from the temperate climates for several reasons. The natural landscapes represent a stark and intriguing contrast to the green environments of Europe. The way the desert peoples have adapted architecture and economic activities to this environment is a source of fascination to the visitor. Tunisia’s tour operators need to devise circuits and experiences that will convey to the visitor the meaning behind the ways of the desert peoples.

There is a general weakness in Tunisia in the presentation of its cultural resources for the enjoyment and education of visitors to the cultural sites. The availability of interesting and substantive interpretive texts posted at the sites providing the basic background on their historical significance is at most locations very lacking, and often totally lacking in any foreign languages. This is the situation in the archeological sites and in the Medinas. In the key museums the provision of information is very uneven even from one section of the same museum to the next. This is an area where different agencies are acting to improve the information and educational content at these resources for both Tunisians as well as for foreign visitors.

It is worth stressing that the archeological sites can serve actively as fine present-day venues for cultural events and performances. The amphitheater of Carthage and the Coliseum of El Jem are sites for different types of performances and are used to host cultural events. These two sites are examples of sustainable uses of ancient resources of great interest to both the Tunisian public as well as to international tourism. The INP and AMVPPC are working on ways to sustainably permit other public uses of cultural sites.

An additional type of culturally motivated tourism is educational tourism consisting of the young and less young seeking instruction in Arab and Berber languages, Islamic traditions and even in some of the traditional arts and crafts from North African and Arab culture. Universities and institutes in the Tunis and Hammamet areas are serving this kind of tourism, which typically requires a long stay, dormitory housing for many and low daily expenditure. In view of the rising interest in Europe in the Arab world, Tunisia is ideally suited to serve as a host and educator and must not overlook the good will that this type of visitor can generate for the country.

Table A5.2.1 shows comparison of various sites in Tunisia evaluated by good guidebooks in the world; Guides Blues (French), Lonely Planet (English) and Aruki-Kata (Japanese). Figure A5.2.1 illustrates the distribution of cultural interest sites.

Table A5.2.1 Evaluation of Major Resources for Cultural Tourism by Tour Guidebooks

Cultural Sites	Guides Blues (France)	Lonely Planet (Australia, UK, etc.)	Aruki-Kata (Japan)
Carthage	3	21	10
Jerba	3	9	21
Tunis Medina	3	18+R	5
Kairouan	3	14	6
Sousse	3	12	8
Bardo Museum	3	5+R	3
Dougga	3	8+R	4
Berber	2	3+R	5
Tozeur	3	9+R	6
Sbeitla	2	8+R	3
Sfax	1	6	4
Bizerte	1	6+R	1
Le Kef	1	8+R	2
Monastir	1	8	4
Mahdia	1	6+R	3
El Jem	2	8+R	2
Bulla Regia	1	8	3
Gabes	1	6	3
Hammamet	2	5+R	4
Nabeul	1	8	2
Nefta	2	5	3
Makthar	1	5	0
Thuburbo Majus	2	5	2
Matmata	1	5	3
Douz	1	6	4
Gafsa	1	2	3
Kerkennah	1	3	2
Sidi Bou Saïd	2	3	3
Tabarka	2	0	3
Tamerza	1	0	4
Zaghouan	1	2	1
Chemtou	0	0	0
Ain Drahim	0	0	1

Note: Guides Blues: 3=exceptional, 2=very interesting, 1=interesting;
Lonely Planet: "Number of pages"+R (in case recommended)
Aruki-Kata: Number of pages

Source: Guides Blues Tunisie, Hachette, 2000; Lonely Planet Tunisia 1st edition, July 1998; Aruki-Kata, Diamond Big, December 1998

Figure A5.2.1 Locations of Cultural Interest

Source: Ministry of Culture
JICA Study Team

A5.3 MICE TOURISM[1]

Little tourism is based in the cities and towns. Some of the culturally motivated tourism stays in the cities but generally is on circuits originating in Tunis or at the coastal resort areas with short stays at each stop. The cruise passengers generally make quick visits to the attractions in the greater Tunis area for several hours before returning to the ships for evening departures. It is the participants in meetings and conventions that constitute the lucrative segment of *business tourism*, which favors city hotels and facilities. The larger hotels are managing most of the capacity for functions, which is usually contained on their own premises. The more recently built hotels are equipped with related features such as breakout rooms, good telecommunications, attractive public areas and extensive offerings of equipment needed for most internationally attended events.

Most of the nation's capacity for functions is located in the Greater Tunis area and only limited capacity is available at hotels in N-Hammamet and Sousse-K regions. It is noteworthy that the hotels of the Jerba-Z region has somewhat limited capacity for large events drawing 500 to 1,000 persons or more. There are additional facilities belonging to political parties or trade unions in Tunis-Z region, but the facilities that are managed and marketed to international standards include Parc du Kram as well as the major hotels.

Table A5.3.1 Key Meeting Facilities

Meeting Facility		capacity of largest room (persons)
Parc du Kram, Tunis area	Greater Tunis	3,000 persons
Hotel Abu Nawas, Tunis	Tunis	1,000
Palais de Congrès, downtown Tunis	Tunis	2,500
Centre International de Foires et Commerces	Tunis	
Bourse du Travail, downtown Tunis	Tunis	600
Orangers Groupe	Hammamet	700
Riviera Hotel	Kantaoui	800
Riadh Palm Hotel	Sousse	1,000
Amir Hotel	Mahdia	1,000
Pasino Casino	Jerba	1,200
Palais de Congrès, Hotel Miramar Carthage Palace, Gammarth (under construction)	Greater Tunis	1,200; also Aqualand & Thalassotherapy centers.
Meeting hall (proposed)	Kantaoui	1,200
Hammamet Yasmine (under construction)	Hammamet	2,000

Source: Tunisian Convention Bureau

Tunisia's flagship exhibition facility is the Parc du Kram located on the lake in the coastal village of Le Kram, a convenient 15-minute drive from the downtown area of Tunis. It can accommodate events of up to 3,000 persons, but is scheduling a few future events of up to 5,000 persons.

Some of the hotels are affiliated with foreign hotel companies, which will be instrumental in marketing the hotels to the international business community for

[1] MICE tourism stands for the tourism related to "Meetings, Incentives, Conventions and Exhibitions" and includes relevant tourism activities such as excursion, leisure and shopping, etc.

events. The Côtes de Carthage vicinity contains an excellent combination of resources suited for the MICE markets (Meetings, Incentives, Conventions and Exhibitions). The key benefits of this crucial vicinity include:

- Tunisia's main focus of meeting facilities including the Parc du Kram and several of the hotels.
- International standard hotel capacity extending from Gammarth on the north to Le Kram on the south, plus hotels in Tunis.
- Easy proximity to all hotels, businesses and government offices of Greater Tunis.
- Easy proximity to the prestigious, garden suburbs of Carthage, Sidi Bou Said and La Marsa.
- Numerous recreational activities: restaurants, a golf course, thalassotherapy centers, night clubs, museums and archeological sites.
- Close proximity to the international airport.

The construction of new hotels in Gammarth equipped with meeting facilities will further improve the Côtes de Carthage vicinity for meetings and events drawing an international participation. This region will function as a full-service, well-rounded venue for internationally attended events. The main project is the Hotel Miramar Carthage Palace which will have its own center for functions as well as a thalassotherapy center and water-oriented amusement park. The new hotels will be equipped not only with modern facilities for meetings but also for important secondary activities for sports, recreation, nightlife, cultural pursuits and the like.

A favorable recent development is the creation of the Tunisia Convention Bureau, which is functioning as a promotional body to draw meetings and other types of events to Tunisia. It is a small private sector entity working on a fee basis and is operating internationally to benefit its shareholder companies as well as the industry generally. If it works well, it will use a cohesive approach to improve Tunisia's outreach to international corporations, associations and organizations.

A5.4 NATURAL RESOURCES

A5.4.1 Spa Resorts

Three such resorts have been operating for some years and are under government management, The Office National du Thermalisme. They are located at the following sites:

1. Centre Thermal de Korbous: A 4.5-km drive east of Tunis in Cap Bon on an outstanding scenic seaside location overlooking the Gulf of Tunis, with 8 sources.
2. Centre Thermal de Jebel Oust: At a countryside location 35 km west of Tunis, with 2 hotels adjacent.
3. Centre Thermal de Hammam Bourguiba: Near the Algerian border west of Ain Draham, in a remote location one-hour's drive south of Tabarka.

These facilities offer hotel lodging, food and drink, and other health-related services for skin and other types of ailments. The clientele is nearly exclusively local, and the services are primarily for prescribed treatment of ailments as diagnosed by physicians. The costs are affordable for the Tunisian budget. All three have scenic locations, and the Korbous facility's location in a mountainside hamlet overlooking the Gulf of Tunis is a very beautiful location, a tourist attraction in itself for its natural beauty.

The government policy is to privatize these facilities and the Korbous facility is already under private management, with a second one in process of privatization. The standard of the facilities is not up to international levels and they are not actively promoted to tourists as a complementary activity. In summary, they are currently bypassed by international tourism, although they have some potential.

A5.4.2 National Parks and Reserves

There are eight protected areas given national park status in Tunisia, and over 15 additional areas designated as reserves for the protection of species of flora and fauna. These resources are described in Section 2.3 on environmental resources and issues. There is no particular area of outstanding distinction or renown that is drawing international tourism in significant visitor flows. These areas serve other objectives of environmental and bio-diversity preservation, and the recreational and leisure time needs of the local population. However, some locations have special undeveloped features such as hot springs or archeological sites that could be prepared in the future for use by the visiting public. The visitor facilities in the parks are generally very limited.

Active forms of tourism such as horse-back riding, camel-back riding, hiking and camping are possible in many of these areas, but there is no one area or park that is outstanding for such activities. Many of the tourist excursions by camelback for example occur in desert areas that are not included in any park or reserve.

A5.4.3 Marine Parks

Of interest to pleasure boating enthusiasts, to general tourists and to underwater divers, the islands of Zembra, Zembretta and Galiton have park or reserve status. It is possible that in the future if they are equipped with basic visitor facilities, they will attract a low volume of nature-based tourist activity interested in observing the natural environments underwater and on land. At present these islands do not attract major flows of foreign tourists since they are not equipped to do so.

A5.5 VISITOR FACILITATION

A5.5.1 On-Site Visitor Facilities[2]

The Study Team assessed the conditions of on-site visitor facilities provided at major cultural heritage sites, with the results presented in Table A5.5.1 These sites are those attracting a larger number of visitors as well as treated extensively in several tourist guidebooks. The facilities assessed include directional signs and parking (serving the transport to the sites), and on-site facilities that can be categorized as presentation facilities (describing the sites and navigating visitors within the sites), and amenities (serving the peripheral needs of visitors to the sites). Primary findings follow below.

The sites assessed are those under the AMVPPC’s responsibility, except for the aqueduct of Zaghouan and Berber heritages. In general the standard of the sites with respect to presentation value, safety and environmental protection is needs improvement.

[2] This topic has been substantially covered by the World Bank study on Cultural Heritage Sites. It covers both the content of heritage sites as well as adequacy of the visitor facilities and accessibility at each of the country’s main sites. Nevertheless a number of needs observed by team members are highly relevant to this JICA study and are identified in this report.

Table A5.5.1 Assessment of on-site Facilities

Site	Direction Signs	Parking	Museum	Site Interpretation			Amenities	
				Signage	Explanation	Language Availability	Toilet	Kiosk
Archeological Sites								
El Jem	limited	average	NONE	NONE	NONE	NONE	average	average
Park of Carthage	limited	average	good	limited	NONE	average	average	average
Sbeitla	limited	good	average	average	average	limited	good	good
Kerkouan	limited	average	*	NONE	NONE	NONE	average	*
Dougga	limited	average	NONE	average	NONE	NONE	average	NONE
Boulla Regia	limited	limited	limited	limited	NONE	NONE	limited**	limited**
Chemtou	limited	average	good	NONE	NONE	NONE	good	limited
Zaghouan	NONE	NONE	NONE	NONE	-	-	NONE	NONE
Medinas								
Kairouan	limited	limited	limited	NONE	NONE	-	limited	-
Sousse	limited	average	average	NONE	NONE	-		-
Tunis	limited	NONE	limited	limited	limited	-	limited	-
Jerba	limited	limited		limited	NONE	-	limited	-
Tozeur	limited	limited	limited	limited	NONE	-	NONE	-
Berber Heritage								
Matmata	average	limited	NONE	NONE	NONE	NONE	limited	limited
Tamerza	limited	limited	NONE	NONE	NONE	NONE	NONE	limited
Chenini	limited	average		NONE	NONE	NONE	limited	limited
Museums								
Bardo	limited	good	-	limited	limited	limited	good	average
Cartage	limited	average	-	good	good	average	average	average
Sousse	limited	limited	-	average	average	limited	average	limited

Note: 1) Sites are listed by order of visitor volume except for Berber heritage.
2) Blank cells indicate areas where surveys have not yet been conducted.
* impossible to assess due to reconstruction. ** currently under construction

Source: JICA Study Team

(1) Archeological Sites

- Most of the major archeological sites lack in adequate presentation,
- On-site museums are generally limited to a simple display of primary archeological objects found there,
- Explanation is generally not provided in several languages, and
- Route signs are not adequately provided.

One notable exception, however, is the recently opened museum at Chemtou, which functions as a visitor center for the archeological site with modern techniques in site interpretation facilities to effectively provide visitors with the historical background of the site and its original images.

(2) Medinas

Many *Medinas* lack in adequate navigation sign boards, and tourists often find difficulty finding the spots they intend to visit.

(3) Berber Sites

They include cave houses in Matmata, *ksars* around Tataouine, and villages in Tamerza, etc. These sites are partly studied for restoration by INP but not for valorization as tourist sites, therefore actually they are outside of the responsibility of AMVPPC. In general, they are not well preserved or maintained, and materials used for the architectures are largely fragile. Adequate preservation would be needed for visitors' safety as well as from an archeological standpoint.

(4) Museums

Major museums are relatively well provided with parking, ticket offices, and toilets. However, they lack in signage to guide visitors as well as effective interpretative materials providing information to help visitors' understanding (e.g., brochures, maps and explanation texts). The languages used are mostly Arabic, French, and sometimes German as well, but not English.

A5.5.2 Directional Signs and Parking

Roadside signage at key road intersections in the vicinity of the country's main archeological sites is often totally absent or posted only in the Arabic language. Foreign motorists may have difficulty finding some of the key sites, and group tourists also cannot find out their actual location.

Parking lots are generally spacious enough except for at *Medinas*, but some are difficult for full-sized motor coaches to maneuver into because of steep grading, or because of the small-sized access roads.

A5.5.3 Tourist Amenities

Tourist destinations should have also pleasant, entertaining and convenient environment around lodging facilities and major tourist spots in order to enhance the attractiveness and convenience of the area as a whole. Tourists' satisfaction can be greatly influenced by such surrounding environment and amenity facilities that may be composed of a variety of elements such as shopping venues for crafts and artwork, public parks, formal promenades, public toilets, and resting areas.

In Tunisia, these environment and amenities of good quality are provided only for a very limited number of major tourist spots.[3] Many of the tourist destinations lack not only in entertaining environment, but also in facilities to meet basic needs. A notable example is the shortage of well-maintained public toilets, which is one of the major complaints among foreign tourists. Although APPC provides and maintains toilet facilities at major cultural tourist sites, their sanitary conditions still remain among the important issues.

The department of environment and culture of ONTT is currently conducting a nationwide study on the provision of multi-purpose amenity facilities in several tourist sites, which are planned to accommodate public toilets, café stands, public phones, and kiosks. Their construction is to be undertaken by municipalities or local governments concerned, although the major hindrance to implementation is

[3] Good examples include Sidi Bou Said (near Tunis), Port El Kantaoui (near Sousse), and the city center of Tabarka.

a lack of staff to operate and maintain these facilities. For this reason, ONTT is seeking the possibility of private sector participation in their operation and maintenance.

A5.5.4 Visitor Centers

The ONTT maintains tourist information centers at the airports and in major cities where the CRTs dispense literature and provide advice to walk-in visitors at the information counters. In some cities the centers' locations are not the most convenient from the standpoint of accessibility and visibility for the visitors. In general they do not contain some of the services that visitors seek such as wall-mounted multi-lingual practical information, public telephones, ATM machines, transportation schedules, airport bus service, clean toilet facilities, or audio-visual aids or diagrams in foreign languages describing the main points of interest in the local vicinity. Establishing of these facilities enhances tourist motivation, and one of the ways to settle the location problem.

A5.6 TOURIST ZONE DEVELOPMENT

A5.6.1 Past Development of Tourist Zones

The country’s tourism development has been largely focused on beaches, with the primary approach employed being the development of tourist zones. This approach dates back to the 1950s in which their development began in Jerba and Hammamet. In 1975, the Government decided to develop five tourist zones including those in Tunis, Hammamet, Sousse, Monastir, and Jerba-Z. The development of these zones was undertaken with the assistance from the World Bank. In 1985, the Government emphasized the need for re-evaluating these zones, leading to their re-development particularly for increasing their capacity. In the mid-1980s, the Government also started to study the development of new tourist zones, eventually leading to the creation of several additional zones.

Currently, there are 17 tourist zones across the country, mostly located in the coastal areas, with only a few zones having been developed in the interior regions. Figure A5.6.1 shows the locations of the existing tourist zones, as well as those currently under planning which will be described later.

In developing the existing tourist zones, AFT has played a major role, drawing up a zone plan, undertaking land and infrastructure development, and marketing and selling serviced lots to developers of hotels, other types of accommodations, and entertainment and other commercial facilities. In recent years, however, the Government has shifted toward more active use of the private sector force in the development of tourist zones particularly in terms of the financing of their development. Accordingly, the AFT’s budget for land and infrastructure development has declined substantially during the 1990s, although it is still responsible for planning of tourist zones.

AFT has contributed particularly to the capacity expansion of beach tourist destinations, although there are several issues recognized by the tourism administration and industry leaders regarding the existing tourist zones. One important issue is that the tourist zone development has excessively focused on the provision of hotel units, while making light of the provision of basic tourist amenity (including shelters, awnings, benches, trees, and lavatories), and pleasant landscaping. In addition, many of the zones lack in entertainment activities, restaurants, and bars outside of hotels, making the area as a whole less attractive for tourists. Moreover, the tourist zones generally lack in variety of hotel units with their relatively monotonous aesthetic features and physical structures, as those of low cost apartment buildings.

A5.6.2 Private Sector Involvement in Tourist Zone Development

As stated in the 9th Development Plan for the tourism sector, the Tunisian Government began using private sector funds for tourist zone development. For this purpose, two companies were established with the public-private partnership approach, one for the development of a zone in the Hammamet area, called Hammamet South (or Yasmine Hammamet), and the other for a zone in Tabarka. Hammamet South provides a good example of this approach as the land and infrastructure development was completed (except for the marina which was still under construction as of year 2000), and several hotels have already been in operation.

For the development of Hammamet South, the company, called Société d'Etudes et de Développement de Hammamet Sud (S.E.D. Hammamet Sud), was established jointly by public and private entities including AFT, state-owned development banks (BNDT, BDET, BTKD, and others), commercial banks, and other private concerns. Based on the zone plan prepared by AFT, this company developed the land, installed infrastructure, and sold the serviced lots to developers of hotels, residential units, and entertainment and commercial facilities. Part of the land developed by the company (in addition to the land purchased from AFT that originally acquired much of the land) was the property of existing landowners, who were later provided, in exchange, serviced (but smaller) plots in the residential zone after the development works were completed.

The zone is to consist of 40 hotel units, several entertainment and commercial centers, a marina, a Médina, a park, and residential areas. Figure A5.6.2 shows the layout of the zone. The total land area (excluding the marina[4]) developed by S.E.D. Hammamet Sud is about 280 ha, with the total cost for land and infrastructure development of TD36 million (before tax and excluding land acquisition and compensation).

While this development provided additional capacity to the Hammamet area, the zone's development pattern is largely characterized by high density and monotone. In addition, there is a fairly long distance to the seaside even from the front row of the hotel zone, let alone, from the second row (compared with the standard beach resorts), forcing visitors to walk all the way from their lodging to the seaside, which is apparently a feature disappointing to foreign tourists.

One reason for this high-density development was the participation of private

[4] The marina has been developed by another company (Société d'Etude and d'Aménagement "La Marina Hammamet Sud") established in the same fashion as S.E.D. Hammamet Sud, jointly by AFT, state-owned development banks (including BNDT, BDET, BTKD, and others), S.E.D. Hammament Sud, commercial banks, and other private concerns. In addition to the marina, the development will include apartment houses, villas, commercial areas, and a convention center. The planned total investment cost is about TD120 million (TD50 million for the marina with the rest for others). The total capitalization of the company (equity plus debts) is about TD34 million, and much of the investment is to be funded by the upfront revenues to be gained from the sales of apartment houses, villas and the marina. The project has been delayed mainly because the sales have been behind the planned schedule.

investors in the project, willing to secure a reasonable level of return on investment. In addition, hotel investment demand for this zone was so high that the planned capacity was revised upwardly.

A5.6.3 New Tourist Zones

AFT has been preparing plans of new tourist zones to be developed during the 10th and 11th Plan periods (and possibly in later years as well). Table A5.6.1 shows the list of the new tourist zones under planning, and brief description of each plan is presented in Table A5.6.2. Many of them are to be developed as beach resorts,[5] with some of them planned for eco-tourism and its sort to provide various products using the sea and other natural resources. Exceptionally, one zone is planned for cultural tourism (Sbeitla). AFT intends to complete all of the planning work by the end of 2001

[5] While the primary reason for focusing on coasts is to meet growing demand for foreign beach vacationers, it is also relatively easier to acquire land at coastal areas where large chunk of land is owned by the state.

Figure A5.6.1 Locations of the Existing and Planned Tourist Zones

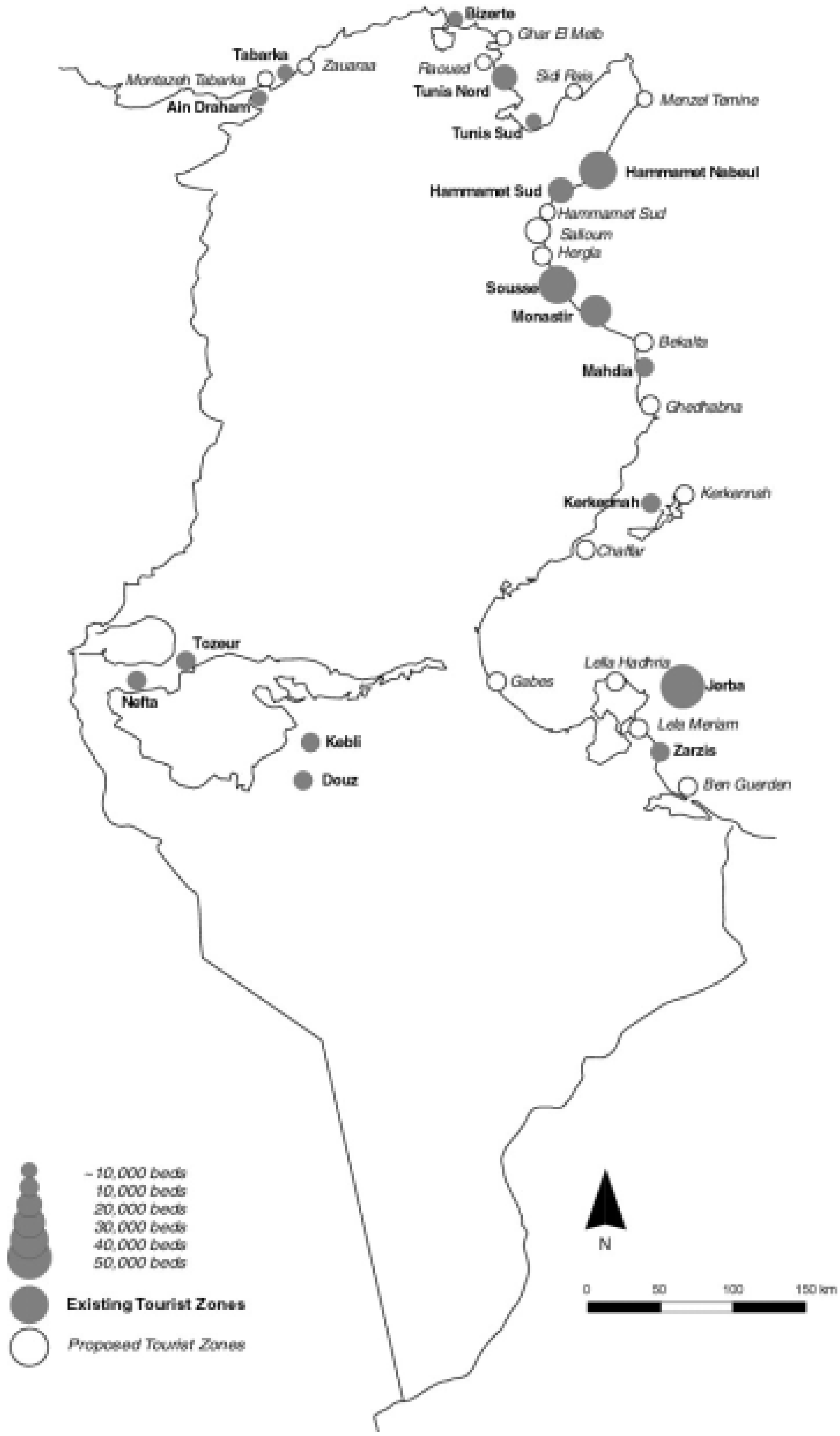
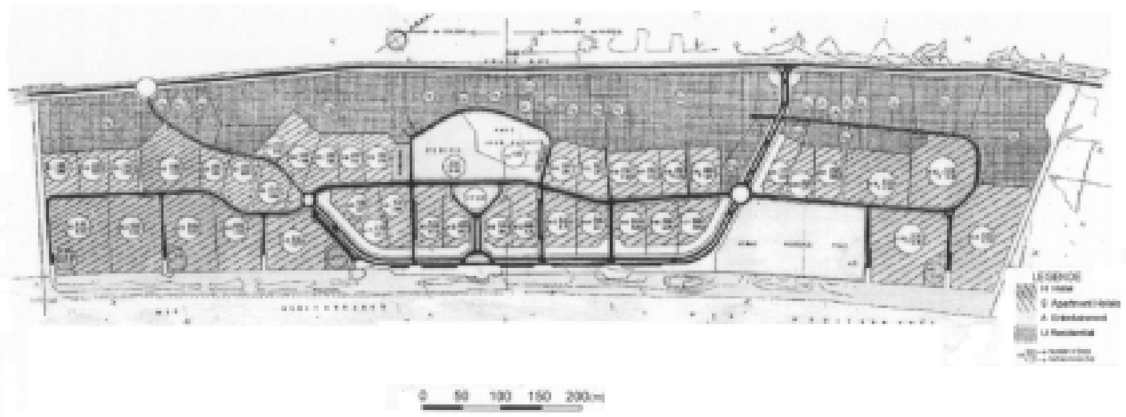


Figure A5.6.2 Layout of “S.E.D. Hammamet Sud” Tourist Zone



Source: AFT

Table A5.6.1 List of New Tourist Zones

Type	Zone	Location	Area (ha)	Planned number of beds
Beach	Cap Gammarth	northern Tunis	73	5,000
	Selloum	between Hammamet south and Hergla	710	18,000
	Hergla	between Selloum and north of Sousse	400	6,000
	Bekalta	between Monastir and Mahdia	100	Phase 1: 1,500 Phase 2: 3,500
	Guedhabna	between Mahdia and Chebba	350	20,000
	Gabès	Gabes	200	10,000
	Lella Hadhria	on Jerba Island	220	4,000
Ecological	Sidi Foukhal	on Kerkennar Island	90	3,000
	Zouaraa	extension of the Tabarka area	100	2,000
Cultural	Sbeitla	Sbeitla	7	N.A.
Interior (Some are still close to seaside.)	Chaffar	at Sfax	30	1,500
	Roued	north of Tunis	12	1,000
	Sidi Rais	east of Tunis	30	2,500
	Kalaat El Andalous	north of Tunis	30	1,500

Note: These are the information updated from AFT, Les Nouvelles Zones Touristiques Point de Situation, April 2000, based on the interviews with AFT officials.

Source: AFT

Table A5.6.2 Plans of New Tourist Zones

Zone	Description of the plan
Cap Gammarth (northern Tunis)	upper-class hotels a marina (700 annulus) a convention center (2000 seats) an integrated leisure and entertainment center a national park (140 ha)
Selloum (between Hammamet south and Hergla)	hotels and residential units entertainment and leisure facilities a golf course green area
Hergla (between Selloum and north of Sousse)	hotels and residential units a yachting resort a golf course green zones
Bekalta (between Monastir and Mahdia)	hotels tourism products in accordance to the local population's wishes and satisfying the customers' needs
Guedhabna (between Mahdia and Chebba)	hotels a marina and yachting resort a cultural center with an archeological site, an open-air theater, a museum, and art galleries
Gabès	N.A.
Lella Hadhria (on Jerba Island)	hotels and residential units artificial Médina and entertainment facilities protection of environmentally sensitive areas a golf course water supply
Sidi Foukhal (on Kerkennar Island)	hotels (with architecture matching the natural environment) three large-scale entertainment and leisure centers adapted to the natural resources (sea and nature) socio-cultural, aquatic, play, sports, and commercial facilities
Zouaraa (extension of the Tabarka area)	hotels and chalets deluxe high standard seaside products for tourists with preference to healthy and natural environment and relief parks, entertainment and sports facilities, and natural spaces (arboretum, horse riding clubs, flower parks, etc.)
Sbeitla	N.A.
Chaffar (at Sfax)	hotels and residential units a golf course entertainment and seaside leisure activities, and commercial facilities
Roued (north of Tunis)	hotels, residential units, and bungalows (mainly for Tunisians) areas for entertainment, leisure and commercial activities
Sidi Rais (east of Tunis)	accommodations incl. residential units (mainly for Tunisians) areas for sports and commercial activities with green spaces camping areas
Kalaat El Andalous (north of Tunis)	N.A.

Note: These plans are subject to change depending on the results of the studies currently undergoing for many of these zones.

Source: AFT, JICA Study Team

According to AFT, the top three priority zones are Cap Gammarth, Selloum, and Hergla. Planning work has been undergoing for these three zones. The development of Cap Gammarth is planned to include a marina, a convention center, and a national park as well as several upper-class hotels. Near the development site, there is also an area reserved for the development of official residences for the Maghreb states. Apparently, this zone targets the up-market of foreign beach vacationers as well as the MICE market, which is a sensible strategy in view of the natural and man-made resources existing in and around the area (including beautiful beaches and the coastline, terrain with ups and downs, Carthage, Sidi Bou Said, and the proximity to Tunis and the international airport). Currently, road construction and improvement is undergoing in the Gammarth area.

The developments of Selloum and Hergla are closely linked to the construction of a new airport to be located near Hergla. This new airport is planned to be opened by the end of 2004 in order to provide capacity to meet traffic growth beyond the capacities of the Tunis and Monastir airports that will be no longer expanded in the future. These zones can also be viewed as an extension of the existing beach resorts including Hammamet and Sousse. Particularly, Selloum is fairly close to Hammamet-south where large-scale development has been undergoing.

For Selloum, a zone plan is currently prepared by AFT with the assistance of a local consulting firm, revising the old plan that was made in 1990.[6] This current plan is for an area of about 120 ha with accommodations of nearly 6,000 beds. In the north of this zone, there is still another area that the private sector is willing to develop as a beach resort with 8,000-10,000 beds.

For Hergla, the existing plan was prepared in 1991, and needs to be revised due to the construction of the new airport to be located very closely, possibly affecting the northern part of the zone. The original plan included building a canal to create an inlet where a marina is to be constructed; currently, this area forms a swamp, possibly requiring some sort of protection measures. The total development cost as of 1990 (including land and infrastructure development, the canal, and the inlet, but excluding the marina) was TD95 million at 1990 prices, which should be significantly higher at current prices. The plan, however, may have to be scaled down to avoid the adverse effect of the planned airport (particularly, noise pollution). In addition, master planning has been undertaken since 1994 (and is still undergoing) for the whole area including this zone and its surrounding areas.

[6] The zone plan was scaled down from the 1990 plan, retreating the front line of the zone by about 100 meters from the one in the original plan due to the effect of the tide in winter. The boundary of the zone on the other side was also moved closer to the coastline because of the swamp located on the west of the zone. In addition, the development of a marina that was part of the 1990 plan is no longer included in the current plan. As of July 2000, AFT is in the process of deciding the land use plan based on the alternatives prepared by a consulting firm. Once decided, a more detailed plan including infrastructure planning and cost estimates will be made.

A5.7 KEY ISSUES

A5.7.1 Tourism Resources

Major issues of Tourism resources are mentioned as the strength and weakness of product by type of tourism in the Table A5.7.1.

Table A5.7.1 Strengths & Weaknesses of Tunisia's Product by Type of Tourism

Strengths	Weaknesses
General Tourism and Beach Holiday Tourism	
- Proximity to Europe with growing air links - Security & peace in Tunisia - Attractive beaches with services/facilities - Low competitive price level - Familiarity of Tunisians with Europeans & mastery of French language - Mild winter climate - Good airport, rail & road infrastructure - Traditional hospitality of Tunisian people	- Persistent problem of substandard quality of basic services [lodging, food, tours] including poor physical upkeep of hotels - Disinclination of trade leaders to closely track strategy, conditions of competitive destinations - Lack of well-directed promotion in target markets - Lack of collaboration among agencies - Limited offer of entertainment-sports-cultural activities
Cultural Tourism	
- Exceptional mix of heritage: classical, berber, arab, French colonial legacies - Fascination for Westerners with the civilizations of North Africa	- Absence of star attractions to differentiate image - Lack of posted multilingual interpretive information or well-trained tour guides at museums, archeological sites & other points of interest
Meeting-Incentives-Conventions-Exhibitions [MICE]	
- Location at the gateway to Africa - Expanding hotel capacity at Tunis, Gammarth, Hammamet - Growing availability of secondary activities [golf, spas, casinos, et cetera]	- Limited venues for events drawing over 1,000 persons - Poor operation and substandard condition of the public meeting halls in Tunis, Monastir, Bizerte
Sahara/Desert Tourism	
- Fascination of the Westerners with the desert environment, architecture, and traditions	- Poor presentation of the natural attractions [guides, signage, visitor services] - Long, uninteresting road trips between points of interest

Source: JICA Study Team

A5.7.2 Visitor Facilitation

(1) Lack of variety in entertainment activities and amenities

In some key tourist areas the options for night-time relaxation are limited, with respect to the variety of types of restaurants, night clubs, shopping venues for crafts and artwork, cultural performances, art galleries, public parks and formal promenades. It appears that in some locations there is no space available for entrepreneurs to develop such businesses. In addition, many of the major tourist destinations lack in amenity facilities, particularly well-maintained public toilets, with their improvement needed to better serve tourists.

(2) Poor interpretation at cultural and archeological sites

The educational value that most of the sites offer to both foreign visitors as well as to Tunisians is quite low at most sites and the natural curiosity that most visitors have is not satisfied at the archeological sites and museums. Measures are needed to increase the educational interest of at least a small number of the main sites and to make them safer and easier for visitors of all ages to navigate through and thoroughly enjoy.

A5.7.3 Tourist Zones

Major issues on the tourist zone development include:

- A lack of basic tourist amenity (including shelters, awnings, benches, trees, and lavatories),
- A lack of pleasant landscaping,
- A lack of variety in hotel units with their relatively monotonous aesthetic features and physical structures, and
- A lack of entertainment activities, restaurants, and bars outside of hotels.

For the newly developed zones, particularly Hammamet South, the layout or land use pattern of the zone lacks in measures to enhance the attractiveness of the place, focusing excessively on the provision of capacity with the high-density development, which appears to have resulted largely from the pursuit of investment efficiency through achieving the economies of scale. These issues are well recognized by relevant ONTT and AFT officials

In developing tourist zones, it is extremely important to provide products that will meet the needs of the market, particularly for the development of beach resorts that face fierce competition against a number of destinations across the world. It is necessary to study and assess the market carefully including the preferences of tourists, the degree of their satisfaction, and the product offerings at competing destinations (those successful and unsuccessful). Based on these studies, clear strategies should be devised in planning each tourist zone; the actual planning should be undertaken in line with these strategies and to provide the products that will possibly meet the needs of the target market; and clear direction or guidance should be provided for potential investors in order to actually create the built and natural environment planned, possibly with efforts to exploit the available international expertise. However, the Study Team observes that the current planning and investment approval practices regarding the tourist zone development generally lack in each of these aspects, with much of the attention being paid to increasing capacity.