

Egypt - Travel & Tourism: Government initiatives to revive growth (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

In terms of the volume of guests checking into hotels, Egypt recorded substantial growth during the review period (2012-2016). Luxury was the most popular hotel category and accounted for 58.2% of all check-ins registered in 2016. The number of rental car bookings posted a review-period CAGR of 1.4%, rising from 0.54 million in 2012 to 0.57 million in 2016.

In the passenger airlines segment, the number of seats available declined at a CAGR of -0.9%, falling from 42.3 million in 2012 to 40.7 million in 2016. This was due to recurrent terror attacks and a consequent decline in inbound tourism. However, the total number of seats sold rose at a review-period CAGR of 0.2%, from 30.5 million in 2012 to 34.7 million in 2016.

MarketLine Premium's industry reports provides a comprehensive overview and include sections on risk and reward, key industry trends and drivers, SWOT analysis, industry benchmarking, competitive landscape, industry innovation, deals and key developments.

KEY HIGHLIGHTS

Increase in demand to drive revenue growth

Revenue generated by passenger airlines declined at review-period CAGR of -10.9%, from US\$5.6 billion in 2012 to US\$3.5 billion in 2016. The decline is attributed to a decrease in demand for air travel following the suspension of flights from major European countries. Full-service airlines accounted for 56.7% of total passenger airline revenue in 2016 and will continue to lead the market over the forecast period (2017-2021).

Increase in the number of tourists to drive the size of car rental fleets

The number of cars available to rent in Egypt rose at a review-period CAGR of 1.7%, from 11,171 in 2012 to 11,968 in 2016. It will post a forecast-period CAGR of 1.1% to reach 12,523 in 2021. Egypt has a smaller fleet size than Saudi Arabia, the UAE and South Africa due to its poor road infrastructure, due to which the demand for cars is somewhat lacking.

Revenue per available room to increase over the forecast period

Total revenue per available room declined at a CAGR of -10.8%, from US\$156.3 in 2012 to US\$98.9 in 2016 due to a fall in the volume of tourists on the back of terror-related incidents. However, revenue will post a forecast-period CAGR of 1.8% to reach US\$59.6 in 2021 as the market recovers. Revenue per available room was the highest for luxury hotels, which accounted for a 40.6% share of the total value in 2016, but recorded a review-period CAGR of -10.7%, falling from US\$63.2 in 2012 to US\$40.1 in 2016. It is expected to post a forecast-period CAGR of 2.3% to reach US\$24.6 in 2021.

SCOPE

Risk & Reward Index - The Risk & Reward Index compares the lucrativeness of the Egyptian travel and tourism industry with other countries in the region via a set of specific risk and reward parameters.

Industry Snapshot and Industry View - Key travel and tourism industry statistics, including revenue and expenditure in key segments and trends driving market performance.

Industry SWOT Analysis - Discover the strengths, weaknesses, opportunities and threats impacting market performance.

Industry Benchmarking - Benchmarks the Egyptian travel and tourism industry's performance against regional and global peers in terms of car rental fleet size, car rental revenue, number of hotels, hotel revenue, passenger airline revenue, seats available and seats sold, travel intermediary revenue, and tourism expenditure growth.

Competitive Landscape - Overview of players in the Egyptian travel and tourism industry, specifically airlines, hotels and car rental companies split by category and compared against their peers across a set of relevant industry indicators.

REASONS TO BUY

How is the market performing in terms of indicators such as total tourist visits, passenger airline seats sold, seats sold by purpose of visit such as leisure, revenue, room nights available, room nights occupied, hotel revenue, car rental days among others.

How risky is it to invest in the Egyptians travel and tourism industry compared to other countries in the Middle East and Africa?

What is driving the performance of key industry segments such as passenger airlines, accommodation and car rentals?

Who are the leading players in the Egyptians travel and tourism industry and their overview and product portfolio?

What trends are being witnessed within the Egyptians travel and tourism industry?

What are the Egyptians travel and tourism industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Egyptians travel and tourism industry?

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