

Evaluation of the performance of the tourism sector in Algeria. An Analytical study of indicators for the period: 2015-2020

تقييم أداء قطاع السياحة في الجزائر " دراسة تحليلية للمؤشرات للفترة: 2015 – 2020 "

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Abstract:

This study starts with Algerian various tourism potentials with reference to the volume of tourism investment and the most important indicators related to the tourism sector related to the period 2015-2020. Through our study, we conclude that Algeria is a rich country with diverse tourism potentials in terms of natural resources, multiple cultural heritage, biological diversity, vast area, strategic location...etc., and this is what qualifies it to be a leading country in the field of tourism industry globally.

Keywords: Tourism; Algeria; Performance; Tourism components; Indicators.

Jel Classification Codes : E0 ; Z3

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Introduction:

The tourism sector is considered one of the most important economic sectors relied upon in the development process, especially for oil-producing countries seeking complementary economic sectors to the hydrocarbon sector. Algeria is among these countries that are working diligently to build a strong economy based on strategic sectors to ensure the sustainability of the development process, especially considering Algeria's diverse tourism qualifications and resources, including natural, human, geographical, and cultural aspects, among others. Therefore, it was necessary to focus on this sector and leverage these resources to enhance it. Algeria aims to enter the competitive market to become one of the foremost tourist attractions, through the implementation of a wise, ambitious, and effective strategy. Despite the efforts made by the government, which has made the tourism sector one of the main pillars of the economic growth program alongside agriculture, industry, and renewable energies, the reality of tourism in Algeria does not inspire optimism. This sector has not reached the required level to achieve the desired goals.

A-Problem of the study

The problem of the study revolves around the increasing global interest in the tourism industry and the competitiveness among nations. Considering tourism as a vital sector for driving the national economy and reducing dependency on the hydrocarbon sector, Algeria has focused on revitalizing and enhancing its performance. Based on this premise, the research question is formulated as follows:

"How can the available potentials and resources be utilized to develop the tourism sector and enhance its performance?"

B- Hypotheses of the research

Hypothesis: Given the available resources, Algeria possesses a distinguished tourism sector in terms of performance and effectiveness.

C- Importance of the study:

The study gains its importance from several points, which can be summarized as follows:

- The significance of the tourism sector and the active role it plays in the national economy.
- Examining the extent of differences between the available resources and capabilities and the achieved results.
- The necessity of focusing on the tourism sector as an alternative sector contributing to reducing dependency on the hydrocarbon sector.
- Clarity of vision regarding the continuous indicators related to the performance of the tourism sector and its contribution to the Gross Domestic Product.
- The importance of revitalizing the tourism sector in Algeria as a driving sector for development in the country.

D- Study Objectives

This research aims to:

- Evaluate the performance of the tourism sector in Algeria through an analytical study of indicators from the period 2015-2020.
- Examine the activity of the tourism sector in Algeria.
- Highlight some tourism indicators in Algeria.
- Identify the gap between tourism resources and existing tourism activity in Algeria.
- Propose suggestions to enhance and promote the tourism sector in Algeria.

E- Study Methodology:

Given the nature of the topic, a descriptive methodology was adopted, focusing on tourism and its importance. This includes addressing the tourism resources and assets Algeria possesses for the development of the tourism sector. The study relies on an analytical approach, involving the

evaluation and analysis of various data, statistics, and tables related to the performance and trends of tourism activity in Algeria.

F- Sections of the study

First section: pillar of the development of the tourism sector in Algeria

Second section: Analysis of Tourism Sector Indicators for the Period 2015-2020

I-Pillars of the development of the tourism sector in Algeria:

Algeria possesses significant tourism potentials, as noted particularly by numerous foreign authors who have visited the country. Among the most important qualifications and features that enable Algeria to be an outstanding tourist destination are:

I-1-Natural, Geographic, and Human Characteristics:

Algeria is located in the southwestern shore of the Mediterranean basin and occupies a pivotal position in the Arab Maghreb, Africa, and the Mediterranean Sea. This is due to its geographical, economic, social, and cultural features, in addition to its diverse and authentic nature and multiple resources. Its coastline extends approximately 1644 kilometers. Algeria is one of the largest African and Arab countries in terms of area, estimated at 2,381,741 square kilometers, with a population of approximately 44 million, and over 65% of whom are young. Algeria has two distinct regions:

- The Northern Region: comprising mountainous areas, plains, and the coastal strip.
- The Southern Saharan Region: characterized by three main features: the ground plateaus, known as the "Hamada" and "Droughts"; the second feature is focused on the veins, including the Western Large Vein, the Eastern Large Vein, and the Shash Vein. The third is the "Hoggar" region, which hosts the highest peak in Algeria, the "Tahat" peak at 3003 meters. (Chellali, May 11-12, 2010, p. 03).

Tourist areas in Algeria can be categorized according to geographic diversity as follows:

- The Coastal Regions, Northern Plains, and Northern Atlas Plains: This area is characterized by its long beaches and a large number of archaeological sites dating back to the Roman and Muslim Arab eras, as well as prehistoric times.

-The Atlas Mountain Range: This area hosts the highest mountain peak in the north, "LallaKhedidja," at 2308 meters. It also includes the Aurès Mountains, Ouenza, and a range of mountains parallel to the coast with significant potential for the development of various types of tourism, such as winter sports activities like skiing, climbing, and hunting, among others (Kwache, 2004, p. 222).

-The Desert Region: It stretches over an area exceeding 2,000 square kilometers and can be divided into 5 regions:

-Ghardaia 'M'zab': This region's architectural, cultural, and historical landmarks have been classified as UNESCO World Heritage Sites. Its most important cities include BeniIsguen, and it contains a significant number of palm groves.

-Adrar: This region is known for its diverse cultural history and the presence of ancient castles.

-Illizi: The TassiliN'Ajjer, located in the far southeast, is known for its national sanctuary, which has been classified as a UNESCO World Heritage Site since 1982. It contains all the natural, historical, and cultural elements that make it an exceptional tourist area, serving as an open-air natural museum with over 1500 rock drawings and engravings.

-Tindouf: Extending over an area of 168,000 square kilometers with a population density of approximately 2,300 inhabitants distributed among the ancient palaces, it serves as a semi-open-air museum.

-Tamanrasset 'Ahaggar': The national sanctuary of Ahaggar, established in 1987, is characterized by its topography, flora, fauna, and rock engravings, which constitute real assets for tourism.

The diversity of tourist regions and climates in Algeria contributes to the development of various types of tourism, ensuring that tourist activities are not concentrated in one region and cover different periods, thus contributing to the sustainability of tourism throughout the year (eliminating seasonality).

I-2- The strategic plan for tourism development:

Investments in Algeria are directed towards addressing the shortfall in accommodation, which remains far from meeting the demand in this aspect due to the increasing popularity of tourism. These investments fall within the framework of the national strategy for the development of the tourism sector by 2030, as an integral part of the national plan for regional development, aiming to create a type of coherence and harmony in the implementation of various projects.

This plan serves as the strategic and reference framework for implementing the development strategy of the tourism sector in Algeria by 2030, aiming to capitalize the available potentials and put them in the service of tourism. It also addresses the recorded shortfall, especially in the field of accommodation, which currently has a capacity of only 80,000 beds nationwide, with only 10% meeting international standards.

Under this plan, investment objectives have been set for both the short and medium term, consisting of the completion of seven tourist poles by 2030, in addition to the construction of 20 tourist villages and ecological parks with a tourism dimension distributed across the national territory. These serve as tourist models that allow the structuring of the region and the improvement of Algeria's tourist destination. They include a collection of exceptional tourist villages with various facilities, accommodation facilities, and various activities, in harmony with the regional development project. These poles respond to the cultural and commercial needs of the population. The strategic development plan for tourism aims to implement a new policy (www.andt.dz.org,2022):

- Promoting an alternative economy to fossil fuels.
- Enhancing the image of Algeria and making it a premier tourist destination.
- Activating major balances and reflecting them on major sectors.
- Capitalizing on historical and cultural heritage while considering the specificities of each national territory.
- Continuous documentation between tourism promotion and the environment.

The tourism development plan aims to promote and develop tourist hubs, and it primarily consists of:

- The first hub encompasses areas located in the northeast of the country, including the states of Annaba, El Tarf, Skikda, Jijel, Guelma, Souk Ahras, and Tebessa. It is characterized by over 300 km of coastline and 874,000 hectares of forests. Serving as a focal point and a catalyst for regional tourism development, this hub has significant potential for mountain tourism.

-The second hub is situated in the north-central region and includes Algiers, Tipaza, Boumerdes, Blida, Chlef, AinDefla, Medea, Bouira, TiziOuzou, and Bejaia. Positioned in the heart of the country and along the Mediterranean Sea coast, it spans 615 km, representing 51% of the Algerian coastline. It serves the infrastructure, which forms the basis of development, and provides

exceptional facilities at the national and international levels, offering diverse services for industrial activities and attracting tourists.

-The third hub encompasses the states located in the northwest of the country, including Mostaganem, Oran, AinTemouchent, Tlemcen, Mascara, SidiBel Abbas, and Relizane. This hub boasts a strategic geographic location, located less than two hours from the main market for European tourists (Spain). Covering an area of 35,000 square kilometers, it offers diverse infrastructure, considerable equipment at the national and international levels, services, heavy industry, and various archaeological assets, encouraging greater attractiveness and unexplored opportunities for some tourist spaces.

-The distinguished southeast tourist hub (Ghardaia, Biskra, OuledDjellal, Ouargla, etc.) covers an area estimated at 160,000 square kilometers and has a population of about 1.5 million people. Additionally, it serves as a major center and gateway to the desert.

-The distinguished southwest tourist hub (Adrar, Timimoun, Bechar) covers an area estimated at 603,000 square kilometers. "Tuat – Gourara" is a heritage hub with global significance, featuring a dynamic new space (the border region).

-The distinguished major tourist hub primarily located in the state of Illizi covers an area estimated at about 284,618 square kilometers. It boasts natural, cultural, and archaeological treasures representing three main assets contributing to future tourism development. The vast areas in this distinguished hub include cave paintings that reflect their high historical value. This cultural heritage is protected by the National Reserve (Tassili National Reserve) and was classified as a World Heritage Site by UNESCO in 1981.

-The major distinguished tourist hub (Ahaggar) covers an area estimated at about 456,200 square kilometers of national territory. This hub is surrounded by the state of Tamanrasset and is a vast region rich in natural and cultural resources. It can be considered a strategic hub, with an increased value in tourism development in the region.

The archaeological, natural, and cultural heritage represented by Ahaggar is worthy of exploitation not only in the tourism sector but also in the economic and social sectors.

I-3-Integrated Model for Economic Growth

The most important macroeconomic indicators indicate the presence of a solid and stimulating foundation to achieve this, foremost among them being stability in the economic growth rate within the range of 3.2% on average in recent years, with an expected annual rise of 4% in the medium term. In addition, there has been an improvement in the Gross Domestic Product (GDP) estimated at about \$168 billion in 2022. Foreign exchange reserves reached \$46.5 billion in 2020 and increased to \$60 billion by the end of 2022. On the other hand, the burden of external debt has recovered, not exceeding \$3 billion.

In light of these indicators reflecting a relatively stable and stimulating economic situation, especially with the adoption of a new investment law characterized by flexibility and enhancing the partnership between the public and private sectors (Executive Decree No. 22-302 dated September 8, 2022, regarding the investment law that approves a special system aimed at structured investments, high-capacity investments for wealth creation and job creation, which enhances the attractiveness of the region and serves as a driving force for economic activity towards sustainable, economic, social, and regional development, particularly contributing to import substitution, export diversification, integration into global and regional value chains, technology acquisition, and performance improvement), which also aligns with the Algerian government's action program based on 05 strategic sectors prioritized to support the development path and achieve economic diversification. The tourism sector is considered one of these priority developmental sectors that can be presented as follows:

Industry in its various types, covering 13 productive sectors with a focus on improving handling.

-Tourism: The new concept of tourism is linked to current trends in global tourism and focuses on available natural resources and potentials. Seven tourism areas requiring enhancement have been identified: domestic tourism, desert tourism, coastal tourism, urban tourism based on various integrated sub-sectors such as entertainment and shopping in city surroundings, business tourism, exploring the depths of cities, thermal and wellness tourism, cultural tourism related to organizing conferences and events, specialized tourism comprising modern activities such as diving, fishing, climbing, raiding, and marathons.

-Agriculture: Mainly focused on constant reinforcement of food security and development of rural areas.

-Renewable energy sector: Aimed at installing a capacity of 22,000 megawatts by 2030, with 4,500 megawatts achieved in 2019. This program includes solar and thermal energy as well as wind energy.

-Information and Communication Technology (ICT) sector: Involves the development of the digital economy, technological hubs, introduction of electronic banking services, information security systems, and databases, etc.

II-Analysis of Tourism Sector Indicators for the Period 2015-2020:

Through this axis, we aim to examine the most important tourism indicators in Algeria for the period 2015-2020, in order to assess the extent to which these tourism assets have been utilized. This will be achieved through the following elements:

II-1- Summer Season:

The summer season in Algeria witnessed fluctuations during the period from 2015 to 2020, as illustrated in the following table:

Table n°1: Summer Season in Algeria for the Period 2005-2020

Years	2015	2016	2017	2018	2019	2020
Total number of beaches	579	590	608	611	581	565
The number of licensed beaches for tourism	382	382	398	404	426	362
The number of beaches not licensed for tourism.	65	208	210	207	155	203
Visits to the beaches (million)	121.5	119.5	132	108	95	39

Source: Ministry of Tourism and Traditional Industries, Accessed: 15/11/2022

See: <https://www.mta.gov.dz>

From the table above, we notice a decline in the number of licensed beaches for swimming during the period 2016-2020. In 2019, there was an increase of 426 beaches, reaching a peak, and then it decreased to 362 beaches in 2020. It is noteworthy that the number of beachgoers peaked in 2017 at 132 million visitors and reached its lowest point in 2020 with 39 million visitors. This decrease can be attributed to the increase in the number of beaches not licensed for tourism during this period, reaching 203 beaches in 2020. The significant decrease in the number of unlicensed beaches is largely due to the COVID-19 pandemic, as the Algerian government implemented a series of measures, including the closure of beaches, to prevent the spread of the virus.

II-2- Desert Tourism:

The desert tourism season during the period 2015-2020 can be highlighted through the following table:

Table n°2: Desert Tourism Season in Algeria for the Period 2015-2020

year	2015	2016	2017	2018	2019	2020
Residents	373218	597132	837112	143300	240927	418127
Foreigners	50416	5067	50217	87125	23501	85712
total	423634	602199	887329	230425	264428	503839

Source: Ministry of Tourism and Traditional Industries, Accessed: 15/11/2022

See: <https://www.mta.gov.dz>

The table indicates that desert tourism witnessed an increase and inclination from both residents and foreigners. For residents, it increased from 373,218 in 2015 to 418,127 in 2020. As for foreigners, it increased from 5,067 in 2016 to 85,712 in 2020. This suggests an improvement in the status of desert tourism in Algeria during this period. Despite this development, desert tourism remains distant compared to the existing potentials.

II-3-Investment

During the period 2015-2020, the state of tourism investment in Algeria can be highlighted as follows:

Table n°3: Status of investment projects for the Period 2005-2020

year	2015	2016	2017	2018	2019	2020
Projects in progress	504	584	764	799	889	804
Suspended projects	101	119	147	181	239	308
Projects not initiated	607	793	928	1631	1220	3801
Completed projects	58	106	107	67	107	87
Total	1270	1602	1946	2210	2455	2579

Source: Ministry of Tourism and Traditional Industries, Accessed: 15/11/2022

See: <https://www.mta.gov.dz>

During the period 2015-2020, tourism investment projects experienced a sort of stagnation. Despite the development in the number of ongoing projects, the total number of projects increased from 101 in 2015 to 308 in 2020. Similarly, non-launched projects witnessed an increase from 607 projects in 2015 to 3,801 non-launched projects in 2020.

This trend can be explained as a result of the fluctuations in oil prices and the austerity policy adopted by the government to manage this challenging period in order to maintain economic stability and fiscal balance. On the other hand, relatively few projects were completed despite the

improvement in their number during this period, moving from 58 completed projects in 2015 to 87 completed projects in 2020.

As a result of this stagnation, Algeria was classified within the Global Tourism Competitiveness Index as one of the lagging countries, ranking 116 out of 140 countries in 2019. The country also faced similar delays in the Business Environment Index, Tourism Policy Index, and Suitable Conditions Index, ranking 132nd in tourism priorities in 2019. It also ranked 139th in the International Openness Index, which is second to last.

All of this poses a significant challenge in light of the focus on enhancing the role of the tourism sector in supporting economic growth accompanying development. It makes it a priority for the government to give a strong push to tourism investment in all its forms, as it provides the infrastructure on which the sector relies as one of the most important complementary attractions to other elements.

II-4- Tourism Revenues and Expenditures:

Tourism revenues and expenditures during the period from 2015 to 2020 can be highlighted through the following table:

Table n°4: Balance of Payments (Travel Item) for the Period 2015-2020 (Unit: Million US Dollars)

year	2015	2016	2017	2018	2019	2020
Revenues	304	209	140.5	169	165	42.9
Expenses	677	475	580	494	500	232.6

Source: National Office of Statistics, Accessed: 16/11/2022 See:

https://www.ons.dz/spip.php?rubrique395&debut_articles=0#pagination_articles

The previous table indicates that the amount spent by citizens in foreign currency abroad is higher than the volume of foreign currencies resulting from non-resident tourist flows within the country. It is worth noting that tourism revenues do not encompass all tourism income because most exchange transactions occur in the parallel currency market, especially by Algerians residing abroad.

II-5-Tourism Sector's Share in Gross Domestic Product

The share of the tourism sector in the gross domestic product (hotels, cafes, restaurants sector excluding the fuel sector) remains very limited and has approximately ranged around 2% during the study period. This is illustrated by the following table:

Table n°5: Evolution of Tourism Sector's Share in Gross Domestic Product (Hotels, Cafes, Restaurants Sector)

year	2015	2016	2017	2018	2019	2020
The share of tourism in the gross domestic product (GDP).	1.3	1.4	1.6	1.7	1.8	1.1

Source: National Office of Statistics, Accessed: 16/11/2022 See:

https://www.ons.dz/spip.php?rubrique395&debut_articles=0#pagination_articles

We note that the share of tourism in the gross domestic product (GDP) declined in 2020 compared to previous years, indicating a slump in tourism during that year and its ineffectiveness and contribution to the national economy. The main reason for the decline in the tourism sector can be

attributed to the various measures taken by the Algerian government to curb the COVID-19 pandemic in 2019, including restrictions on movement and travel and the closure of public spaces.

II-6-Employment in the Tourism Sector:

The following table indicates the evolution of employment in the tourism sector during the period 2015-2020.

Table n°6: Employment in the Tourism Sector (Hotels, Cafes, Restaurants Sector)

year	2015	2016	2017	2018	2019
Number of employees	265803	270317	300000	308027	320000

Source: Ministry of Tourism and Traditional Industries, Accessed: 17/11/2022

See: <https://www.mta.gov.dz>

From the above table, it becomes apparent that employment in the tourism sector has seen an improvement during the period. The number of workers in the tourism sector was estimated at 265,803 employees in 2015, and then the number continued to increase to reach 320,000 employees in 2019, with a total increase of 54,197 employees during the period 2015-2019.

II-6-Results

The study has concluded with a set of key findings, including:

- There is underutilization of the tourism sector in Algeria despite the abundant potential and resources it possesses.
- There is a weakness in the number of foreign tourists visiting Algeria.
- The share of tourism in the gross domestic product remains very weak, representing only 1.1% in 2020.
- Investment projects during the study period of 2015-2020 experienced a kind of stagnation. Despite the development of some projects and the continuity of work in others, there was an increase in stalled projects by 207 projects during the period of 2015-2020. Additionally, non-launched projects increased from 607 projects in 2015 to 3,801 non-launched projects. Meanwhile, completed projects during this period were few, with 58 completed projects in 2015 increasing to 87 completed projects in 2020. This low number calls for continued efforts to complete projects.
- There has been an improvement in employment in the tourism sector in Algeria during this period. The number of workers in the sector was 265,803 employees in 2015, increasing to 320,000 employees in 2019, representing an increase of 54,197 employees.

Conclusion:

The tourism sector has become an integrated industry that contributes to achieving added value supporting economic growth and development in a country, especially when it is associated with optimal utilization of available resources. For Algeria, it possesses significant tourism assets that surpass many countries worldwide. Through these resources, it can attract tourists and develop the tourism sector better than its current state.

Our study concludes that the indicators of the tourism sector in Algeria still lag behind the value and importance of the resources available. This leads us to the urgent need to reconsider the evaluation of the strategy adopted for tourism sector development in order to maximize its benefits. Tourism in Algeria should be a supportive sector for economic growth and a guarantor of sustainable development. Therefore, there is a need to focus on sustainability and responsible planning, encouraging both domestic and foreign tourism investments, considering tourism as a competitive industry and a key driver for other sectors and activities.

Algeria possesses tourism qualifications and natural, geographical, and human resources that make it a leading tourist destination. To achieve this, it is necessary to learn from successful experiences, programs, and plans of other countries in the tourism sector to draw up a tourism policy that allows Algeria to take its natural place within the global tourism market.

Suggestions:

- Algeria possesses significant tourism assets; however, the tourism activity does not fully reflect these assets. Therefore, there is a need to optimally utilize the available resources, taking into account the preferences and culture of Algerian society, including its heritage, customs, and traditions.
- Investment projects should be closely monitored, with an emphasis on the importance of sustainability and continuity in project completion.
- The development of desert tourism should be promoted, given its vast potential in terms of heritage, history, and expansive desert regions.
- Clear and long-term policies should be established to enhance the tourism sector, ensuring the continuity of these policies.
- Those involved in the tourism sector must realize that tourism is a competitive field with a global market. Therefore, efforts should focus on providing quality services at competitive prices compared to other countries.
- The Algerian government should work on enhancing the country's infrastructure to ensure the presence of advanced and suitable infrastructure to enhance the competitiveness of the sector.
- Learning from the experiences of leading countries in the tourism industry and sustainable tourism practices is essential.

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