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# **How to better position Tunisia as an attractive holiday destination for European visitors and align the offer with their expectations?**

**Bachelor Project submitted for the degree of Bachelor of Science HES in International Business Management**

By

**Mehdi JABALLAH**

Bachelor Project Mentor:

**Nicolas DEPETRIS-CHAUVIN, Professor**

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## Executive summary

Small by its size but great by its history, Tunisia is a country that always aroused the covetousness of great powers. Its strategic geographical position, close enough to Europe to represent a gateway to Africa and the Arab world made it a very desired catch for the empires of all times. Tunisia successively suffered from the domination of the Roman empire, the early Arab Muslims, and the Ottoman Empire, before remaining a French protectorate until the middle of the 20<sup>th</sup> century. In reality, the country only gained full sovereignty about 75 years ago.

This rapid historical account provides some context and helps us better understand the trajectory taken by Tunisia since gaining independence in 1956. At that time, the need to build a self-sufficient economic system, resilient to crises and free from dependency on external powers was very pregnant. In that respect, the development of a domestic tourism sector was seen as a great opportunity.

More than sixty years passed since that period, but few changes have been made to adapt tourism policy to contemporary issues. Seaside tourism remains the country's flagship product, while other offers are described as subsidiary or complementary at best. However, Tunisia currently finds itself at a crossroads and needs to review its development strategy urgently. The major disruptions of the last decade (Jasmin revolution, terrorist attacks, Covid-19 pandemic) tremendously impacted tourism activity and stressed the importance of decisive actions to address the country's conjunctural, but also structural vulnerabilities.

In this report, we go beyond a mere analysis of tourism development and its impact on the domestic economy to look at changes that occurred over time on the demand side, in order to determine the reasons why the seaside-based model of development is not effective anymore. In particular, we emphasize the importance of diversification, but also listen to visitors' expectations, and eventually find a new positioning for the country so as to make it attractive for European visitors again.

The survey performed with 114 respondents (mostly Swiss residents) provides interesting insights into the perception of Tunisia as a holiday destination, but also shows the need to break off with the past, and envision a new development strategy for decades to come. In fact, not only has the number of tourists sharply declined over the last decade, but the visitors' origin also changed quite dramatically. Nowadays, a large share of visitors comes from Arab countries, while European tourists, who historically represented the overwhelming majority of visitors, have turned into a minority. Whether this recent evolution will lead to important transformations remains to be seen.

In addition to the survey, the following report includes an interview with a manager from the ONTT<sup>1</sup> based in a major European country. In his view, seaside tourism will remain at the center of the strategy in the future, while other forms of tourism will stay on the sideline. But what kind of seaside tourism are we talking about? The traditional model, which relies heavily on tour operators and focuses on all-inclusive packages in protected resorts? Or a more modern approach enriching the experience with additional possibilities? We don't really know as no long-term vision has been laid out by national authorities so far.

By contrast, neighboring countries such as Morocco have set up comprehensive strategies, taking into account visitors' needs, but also the concerns emblematic of our time such as sustainability and social well-being. Tunisia should take note of the policies implemented abroad to pave its way toward innovation and diversification in the field of tourism.

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<sup>1</sup> Tunisian National Tourism Board

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# 1. Introduction

Tourism in Tunisia took off after independence in 1956. Before that, the country successively suffered from the domination of the Roman empire, the early Arab Muslims, and the Ottoman Empire, before remaining a French protectorate until the middle of the 20<sup>th</sup> century. In this report, we will not only analyze the pivotal role played by tourism in Tunisia's economic development but also question the development model based almost exclusively on seaside tourism and try to understand why it is not effective anymore.

The ultimate objective will be to make sound recommendations to reform tourism policy in Tunisia and reinforce the attractiveness of the destination for Swiss and European visitors. Those recommendations will be based on both quantitative and qualitative data collected through a survey and an interview. Historically, tourism has played a significant role in supporting Tunisia's economic development. Therefore, it is strategically important for the country to reflect on its vision for the industry and stop its continuous decline encountered over the last decade.

More broadly, when talking about the current economic situation and the tremendous challenges faced by Tunisia, we have to keep in mind that the country only regained political, social, and economic control over its national territory less than 70 years ago. As a result, the implementation of economic policies was delayed compared to other Mediterranean countries. Moreover, Tunisia had to deal with major disruptions over the last decade such as the Jasmin Revolution, terrorist attacks as well as the Covid-19 pandemic.

In the following sections, we will begin by reviewing the existing literature and look at studies that have been conducted on tourism in Tunisia. We will also discuss papers written on neighboring countries that have also developed strong tourism industries (Morocco and Egypt) to identify differences in approach and the resulting outcomes.

Later on, we will make a more robust historical account and analyze the development model followed by the Tunisian authorities since independence. All those information will introduce the data collection part of the report, starting with a survey submitted to a representative sample of the Swiss population. Once the results will be gathered and studied, we will discuss them with a manager from the ONTT. The goal will be to evaluate the country's current positioning, before determining the critical changes to be made to establish a clear positioning for Tunisia in the highly competitive tourism industry of the 21<sup>st</sup> century.

After that, we will explore tourism development in Egypt and Morocco more in-depth and try to underline any noticeable differences with Tunisia. We will also see whether some policies adopted in those countries might represent sources of inspiration for Tunisia's decision-makers. Most importantly, whether those countries have been able to meet European tourists' expectations better than Tunisia will represent the major question we will try to address.

Finally, we will review the results and list the findings' limitations in the discussion section. Among other things, we will evaluate critically the methodological choices of the research. In the end, we will not only summarize the main takeaways from this work but also provide sound recommendations in line with the research.

**Table 1: Weight of tourism in the Tunisian economy**

Source: ONTT Units: billions of Tunisian Dinars

PRODUCTS	2004	2005	2006	2007	2008	2009	2010	2012	2013	2014	2015	2016	2017	2018
<b>Tourism</b>	2,290	2,611	2,825.2	3,077.3	3,390	3,471	3,522	3,175	3,221	3,625	2,414	2,373	2,831	4,141
<b>Oil</b>	1,150	1,757	2,017	3,137	4,079	2,093	2,979	2,928	2,838	2,433	1,240	1,210	1,237	1,386
<b>Olive oil</b>	708	476	828	696	759	533	444	593	820	490	1891	872	1009	2,125
<b>Phosphate</b>	24	34	35	71	180	54	81	19	3	18	1	0,6	2	0,3
<b>Phosphoric acid</b>	225	282	317	343	887	418	518	487	384	439	320	498	424	467
<b>Textile</b>	4,245	4,402	4,401	5,128	5,134	4,584	4,864	4,701	5,016	5,179	4,780	5,174	6,045	7,112
<b>Dates and citrus fruits</b>	119	145	133	224	234	259	307	360	398	410	468	511	578	766
<b>TOTAL EXPORTS (also include other products)</b>	16,47	18,67	20,76	25,46	30,76	26,47	30,87	34,15	35,29	36,32	33,94	35,74	42,08	51,44
<b>Tourism in % of export</b>	13.9%	13.98%	13.61%	12.09%	11.02%	13.11%	11.41%	9.3%	9.13%	6.65%	7.11%	6.64%	6.73%	8.05%

Source: ONTT 2018 report. Available from:

<https://www.ontt.tn/sites/default/files/inline-files/Tourisme%20en%20chiffres%202018.pdf>

*This table displays some of the most important exporting industries in the Tunisian economy, with an emphasis on tourism. As we can see, the weight of this industry in the exporting figures (expressed in % of the total) has declined since 2005, despite a noteworthy recovery in 2009 which did not last after the Revolution.*

## 2. Literature review

Between 1881 and 1956, Tunisia was occupied by France and part of the French colonial Empire. Before that, Tunisia was a mere province of the Ottoman Empire and governed by a representative chosen by the Sultan himself. The French were already ruling neighboring Algeria and were determined to engage in a massive modernization of the country. Infrastructures, industrial capacity, educational and health systems, as well as a national administration, were all developed during the French protectorate era that lasted 75 years (Perkins, 2014). This historical parenthesis is a necessary step to better understanding the challenges faced by the first leaders of independent Tunisia and the subsequent economic policies that led to the development of tourism.

Despite their apparent enthusiasm for the economic development of Tunisia, the French cared more about their interests and the prosperity of their businesses. In addition, they placed their men at the head of public corporations and controlled the administration. As a result, the country's new leaders faced a massive challenge when French civil servants left Tunisia after independence was granted in 1956. Driven by a strong anti-French sentiment, the 1<sup>st</sup> president Habib Bourguiba turned to the Soviet Union and adopted a socialist approach, with the support of the population. Interestingly enough, tourism was one of the only domains left to the private sector (Ayadi and Mattoussi, 2014).

Over the period 1962-2000, tourism grew at an average annual rate of 12 percent, making it a central component of the economy. In 2009, tourism employed 450.000 people, representing 12 percent of the working population. The golden age of the sector occurred in the 1980s and early 1990s when the structural adjustment program (SAP) was implemented, with the goal of better integrating Tunisia within the world economy (Chemingui and Sánchez, 2011). Nevertheless, tourism became less profitable from the late 1990s onwards, because of the emergence of services activities such as financial services, data processing, and telecommunications. At the same time, the electrical and mechanical industries also started to attract investors from abroad, especially from Europe, following the signature of the Association Agreement between the EU and the Republic of Tunisia (EURO-MEDITERRANEAN AGREEMENT, [1998]).

From the very beginning, Tunisia positioned itself as an attractive destination for European tourists belonging to the middle-class, eager to find good weather conditions near their borders at an affordable price point. In addition, historical sites such as Carthage, El Jem, Kairouan, and the impressive collection of ancient mosaics also contributed to capturing the interest of an alternative type of visitors, well-educated and interested in history. As early as 1962, the government selected a few places propitious to the development of the tourism industry.

Those locations and their surroundings, primarily located on the coastline, quickly became prosperous and more integrated into the world economy than the rest of the country. Up to this day, unemployment is still much lower in Tunis, Sousse, Hammamet, and Djerba compared to the rest of the country. The geographical fracture is a major issue that has not been tackled seriously since the 1960s. Most political figures come from richer areas and proper communication and transportation infrastructures are still lacking in landlocked regions.

In their paper called *Tackling Regional Inequalities in Tunisia*, Alfonso Medinilla Aldana and Sahra El Fassi denounce the gap between promises from successive governments to promote local-level development and the effective actions taken on this issue (Medinilla and Fassi, 2016). In their view, it is not surprising that the revolution started in Sidi Bouzid, one of the poorest cities in the country located 300 kilometers away from the capital and where people were profoundly impacted by inflation and the lack of support from the government. As we know, political stability and safety considerations are two major conditions for tourism to maintain its reputation. Without an ambitious agenda aimed at addressing social and spatial inequalities, those two conditions remain hard to meet.

All in all, the tourism development strategy followed by the Tunisian government did not evolve from the 1960s up to this day. The main target audience is still European citizens, and the offers proposed are quite limited: mostly all-inclusive packages in coastline areas, and to a lower extent thalassotherapy, excursions in the desert, and promotion of historical monuments. Nevertheless, the geopolitical transformations of the late 20<sup>th</sup> century and early 21<sup>st</sup> century did have an impact on Tunisia's positioning. For 15 years, the EU went from 15 to 27 member states. Tunisia's officials saw that evolution as an opportunity to attract citizens from Eastern Europe. Therefore, they initiated negotiations with the EU to strengthen the bilateral relationship and facilitate the circulation of goods, services, capital, and people. The association agreement was signed in 1998 as explained above, and it was followed by the goal to create a Common Aviation Area ten years later (Creation of a Common Aviation Area with Tunisia, [2008]).

However, the signature of those agreements merely indicates a rapprochement between both parties, rather than a plan to diversify the tourism offer from Tunisian officials. The most important question is to determine whether the existing offer, mostly unchanged since 1960, effectively aligns with the demand from European tourists. Before going any deeper in the analysis, we may express some doubt given the sharp activity decline encountered over the last decade, and the replacement of European visitors by tourists from Arab countries.

A case study published by Polish researchers in 2017 tried to address this question, even though the research method was far from perfect (Brzezińska-Wójcik and Widz, 2017). They asked Polish tourists to evaluate the quality of tourist packages proposed by tour operators in Tunisia and comment on their experience. Thanks to the opening of Tunisian borders for Europeans, Poles are now in fifth place (for European visitors only) when looking at the numbers of visitors in Tunisia, after the French, German, Italian, and British. Facilities proposing such packages are mostly 3 and 4-star hotels, so we can expect a certain level of exigence from people choosing to spend their holidays in such accommodation.

The results were mixed as the average assessment of the holiday package quality was 3.56 over 5. Improvements are necessary for almost all domains, and the importance of the human component appears to be neglected by hotel officials, as tourists expressed the feeling that their complaints were not taken seriously enough.

The last aspect to cover in this literature review and related to the research purpose is to analyze the policies and positioning approaches taken by the two main competitors of Tunisia in North Africa, namely Morocco and Egypt. In 2015, Morocco was Africa's most popular destination with more than 10.2 million tourists. The Moroccan case is interesting to analyze because tourism only became a major economic sector in the early 2000s when the new king

Mohammed VI integrated it among the key priorities of his large-scale development plan (Analysis of tourism policy in a developing country: the case of Morocco, 2018).

Tourism did exist in Morocco before that, but it was never considered a driver for economic development. As opposed to Tunisia, where tourism was one of the first sectors left to the private sector, even though in reality the state used to impose the main orientations, Moroccan authorities have remained in full control of tourism development at all times. Nevertheless, it would not be relevant to go over the whole history of tourism in Morocco, as it would take us away from the main subject of this work. Rather, it will be more appropriate to focus on recent development policies and try to find some inspiring ideas for Tunisia to consider. In his paper, Fernando Almeida-Garcia analyses strategic choices taken since the 1960s by Moroccan authorities, but only the last part is relevant for our study. In particular, the *Vision 2010 and 2020 Plan* will be interesting to look at as it details the ambition of the kingdom and its diversification strategy.

For Egypt, a study was made in 2011 to better grasp the determinants of international tourism demand in the country (Ibrahim, 2011). The Saudi researcher used annual panel data derived from them several possible explanatory variables for the country's attractiveness. This will be a valuable complement to the policy-oriented study presented above on Morocco's tourism strategy.

To sum up this review, it appears that well-documented and diverse research on Tunisia's tourism strategy, positioning, and historical development has been made over the last 10 years. In addition, the paper produced by Polish scholars complements the available evidence with a different approach, directly related to tourists' overall experience in Tunisia.

Since the 1960s, Morocco, Egypt, and Tunisia have been at the forefront of tourism development in North Africa. The three countries share roughly the same geographical characteristics (pleasant weather conditions all year round, several thousand kilometers of coastline, proximity to Europe), but have nevertheless chosen very different paths to develop their respective industries. At a time propitious to global reflection about the future of tourism, comparing the various approaches and finding inspiration for Tunisia's future positioning will be of particular interest.

Ultimately, the added value of this thesis will reside in the addition of a quantitative and qualitative dimension to the existing evidence. Through a survey conducted with Swiss residents as well as an interview with a professional from the field, the goal will be to go beyond a simple account of Tunisia's current positioning to propose ways to better align the offer with the demand, and ultimately make the country's industry more sustainable.

The Global Sustainable Tourism Council (GSTC) defines sustainable tourism as *"an aspiration to acknowledge all impacts of tourism, both positive and negative. It aims to minimize the negative impacts and maximize the positive ones"* (Global Sustainable Tourism Council, 2021). In Tunisia's case, it means taking into account the social and environmental damage caused by the traditional model of development followed up to this day and elaborating a new strategy that is in line with the major issues of the 21<sup>st</sup> century.

## 3. Empirical analysis

### **3.1 Tunisia's current positioning**

#### ***3.1.1 Historical account***

*Note: a map of Tunisia and its different regions (named governorates by the national administration) can be consulted in the appendices (page 86). It may serve as a useful reading aid.*

Before analyzing the survey data, it is essential to make a historical account of the evolution of tourism in Tunisia, the strategic choices made by the authorities, as well as the political motives behind tourism development leading to the country's current positioning. The central question we will try to answer at the end of the analysis will be to determine whether this positioning aligns with visitors' demands, and potentially make some relevant recommendations, based not only on the survey's results but also on the comparative analysis made with Morocco and Egypt.

In 1962, Tunisia was only independent for six years. The country was then in a fragile economic situation and just lost a critical battle against France in the city of Bizerte, where the French maintained a military base after Tunisia's independence. Desirous to deliver on its promise to bring prosperity and initiate a profound post-colonial transformation, president Habib Bourguiba designed a comprehensive development strategy (Camau and Geisser, 2004). One of the components of this strategy was the creation of a tourism industry, organized by the state but with operational management left to the private sector. This decisive choice was also guided by the lack of natural resources capable of accelerating economic development, as this was the case for neighboring Algeria and Libya.

**Figure 1: Majestic Hotel in Tunis**



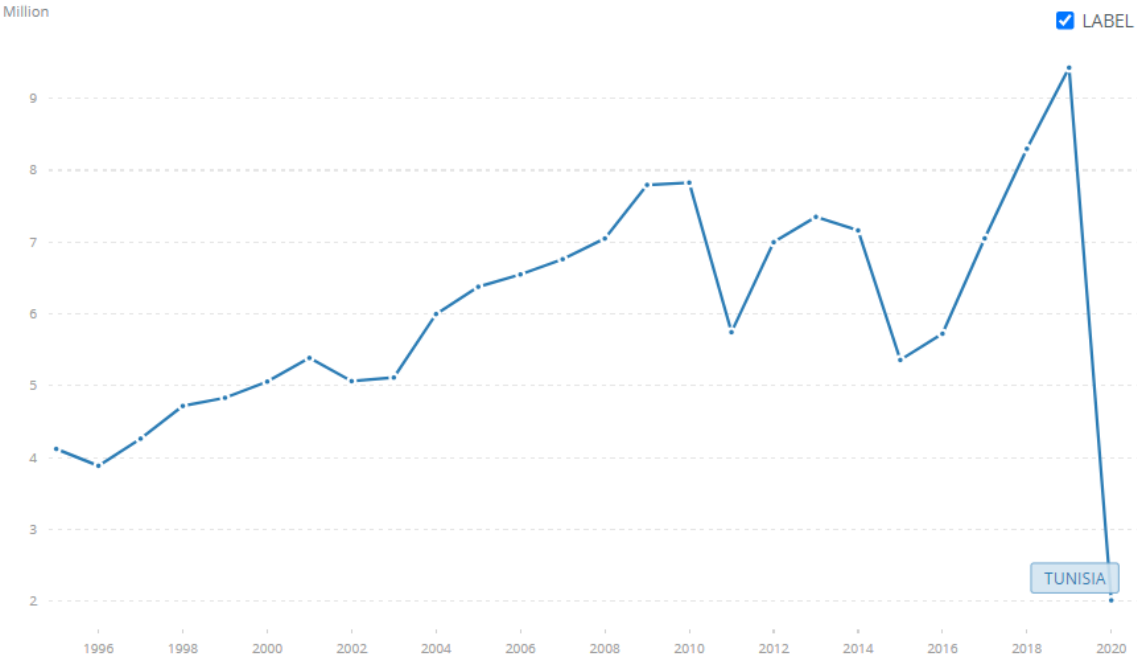
Source: Wikimedia. Available from:

<https://upload.wikimedia.org/wikipedia/commons/3/35/HotelMajesticTunisJuin2012.jpg>

Bourguiba wanted to take advantage of Tunisia’s proximity to Europe to target a mass market of middle-class visitors, eager to spend a few weeks in a sunny place but at a limited cost. The package tour concept was adopted and rapidly allowed the country to attract tourist groups composed of 5, 10, or 20 people. The visitors could choose between staying full time at the hotel or including trips to the desert as well as visits to monuments left from the Carthage era in their package.

In the 1970s and 1980s, the government promoted the construction of hotel resorts in specific places (Tunis, Hammamet, Sousse, and Djerba), while other regions were either dedicated to industrial manufacturing or left under-developed. Later on, President Ben Ali replaced Habib Bourguiba in 1987 with the ambition to strengthen the bilateral relationships with the European Community and the United States, while the previous president tended to align with the pan-Arabism ideology envisioned by President Nasser (Egypt). This change of approach resulted in the signature of an Association Agreement with the EU in 1998. Furthermore, Ben Ali announced the convertibility of the Tunisian dinar in 1992, to promote foreign investment and capital growth. All in all, the first few years of Ben Ali’s mandate were conducive to the development of tourism, as the number of visitors reached 3.5 million in 1992 (Poirier, 1995).

**Figure 2: Tourism Growth in Tunisia (1995-2019)**



Source: The World Bank. Available from:

<https://data.worldbank.org/indicator/ST.INT.ARVL?locations=TN>

### 3.1.2 Model of development

As stated in the literature review, Tunisia's strategic approach to tourism has always been quite straightforward. The authorities put their efforts into positioning Tunisia as a mass-market destination, with a particular focus on all-inclusive packages designed for groups. This also helps to explain why the government chose to concentrate the activities of the sector in a few, well-delimited locations, namely Tunis, Hammamet, Sousse, and Djerba. The logistics were much easier to manage that way. Compared to other African and Arabic countries, Tunisia initiated a process of secularization<sup>2</sup> early on in its history. Concretely, the independentist movement led by Habib Bourguiba was profoundly anti-Islamic and perceived religion as an impairment for the successful completion of its modernization agenda. As a result, Tunisian society was considered one of the most liberal in the Muslim world by Western scholars. This factor helped the country in its quest to position itself as an attractive destination for European visitors.

For them, Tunisia offered multiple advantages: geographical proximity, affordable prices, pleasant weather conditions all year round, ease of communication (especially for French speakers), feeling of safety, and the socio-cultural profile of the Tunisian society, more inclusive and less influenced by religious ideologies than neighboring countries.

Nevertheless, the mass-market strategy based on all-inclusive packages slowly reached its limits in the late 1990s. The sectoral growth attained a plateau, the demand stalled, and more worryingly, social unrest because of economic disparities between the coastal regions and the rest of the country began to alter Tunisia's reputation and stability. Aware of the issues, the government designed a new development plan, promoting the creation of "thematic tourism products", with a clear emphasis on desert tourism (Hazbun, 2007). In practice, this paved the way for the emergence of creative ideas, such as four-wheel-drive adventures and exotic excursions in the desert. Some traditional places were transformed to welcome visitors, and local communities protested against this evolution. A "disneylandisation" process took place, as described in Sylvie Brunel's book (Brunel, 2012).

The diversification strategy also implied the promotion of Tunisian crafts (carpets, ceramic, pottery) and agricultural products (olive oil, dates, fish, figs, oranges, watermelon). In addition, several movies were filmed in the southern region of Tatouine, including Steven Spielberg's famous *Star Wars: Episode IV*. For sure, this contributed to popularizing Tunisia differently on the international stage.

**Figure 3: Berber village in the Tatouine governorate**



Source: Dynamic Media. Available from:

<https://dynamic-media-cdn.tripadvisor.com/media/photo-o/16/5c/55/d6/cour-interieur-du-ksar.jpg?w=600&h=400&s=1>

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<sup>2</sup> The **secularization thesis** expresses the idea that as societies progress, particularly through modernization, rationalization, and advances in science and technology, religious authority diminishes in all aspects of social life and governance (Wikipedia definition).

Even though the initial prospects of the diversification strategy looked promising, it quickly appeared to be insufficient to represent a viable alternative to the traditional seaside model. Indeed, desert tourism is much more expensive, and by definition has only very limited capacity to absorb visitors because of transportation and accommodation issues. It may represent a good complement to coastal facilities while offering the opportunity to position Tunisia favorably in a niche market, but it does not lead to comparable revenue streams. It also requires consequent investments and may trigger conflicts with local communities, desirous to preserve their way of life.

For all those reasons, desert tourism never really took off and remained a small segment of the whole tourism sector with limited development prospects. Later in this report, we will compare the Tunisian development model with the one from competitors in North Africa, namely Morocco and Egypt. One key differentiator that we can underline at this point is the greater emphasis put on advertising alternative offers by Tunisia from the 1980s onwards.

Regarding desert tourism, a paper was published in 2010 by a researcher from the College of Management and Technology of Alexandria (Amara, 2010). In his case study, the author looks at the Siwa oasis and the potential of tourism as a tool of development in this area. In his conclusion, he argues that the location may be included in the national tourism development scheme, with an approach “*based on the principles of precaution and effectiveness at two levels; concerning the tourism activity itself, and concerning its role as a vehicle for developing desert destinations*”. In other words, desert tourism is an interesting segment to explore, but the strategy used for the development of seaside tourism cannot be replicated.

Local populations have to be closely associated in the process, something that has not been done properly in the past, neither in Tunisia nor in Egypt. In remote areas, investments in infrastructures must not only benefit visitors but local communities as well. According to the author, expertise in natural resources management is severely lacking in the Siwa region, and that represents a major impairment to tourism development. In addition, there is a continuous tension between private actors and state authorities when it comes to allocating responsibilities and enforcing regulations. Indeed, the laws on biodiversity and environmental protections are often breached and the state appears incapable to put in place prohibitive sanctions.

Overall, desert tourism has a place in the diversification equation faced by Tunisia. According to the available evidence, the current model, which relies heavily on seaside resorts for its survival, is unsustainable. All-inclusive packages in 3 or 4-star hotels, as well as promotional campaigns solely focusing on coastal destinations during the summer season, will remain important components of Tunisia’s positioning, but the development of alternatives has to be accelerated. Until now, desert tourism has remained a niche market, captured by private businesses and reserved for a privileged elite. The Siwa case shows that the democratization of such destinations is desirable if social and environmental considerations are seriously taken into account.

Another type of tourism that is already present in Tunisia, especially during the colder months is called “health tourism”, and is composed of two main sub-segments: curative medical tourism and short stays aiming at improving overall well-being (wellness-focused). This type of tourism can be presented as a valuable complement to seaside resorts, as it attracts a very different audience (mostly retired people) at different times of the year (typically November to March). In addition, visitors coming to Tunisia for such a purpose tend to remain loyal to a specific location they appreciate and like to come back to the same place year after year.

According to a journal article published in 2015, this type of tourism has not reached its full potential yet in Tunisia (Boulifa, 2015). Thalassotherapy is common along the coastline, but the southern and western parts of the country have been neglected once again. As a result, the territorial fracture, already marked by the concentration of economic activities in major cities such as Tunis, Hammamet, Sousse, Sfax, and Djerba is reinforced.

There is a clear imbalance between the different types of health tourism in today's Tunisia. While curative tourism (including thalassotherapy) is already well-developed, the opportunities opened by other activities (wellness-focused) have not been seized by political authorities. As explained by Boulifa in his article, the expansion of balneology in the southern region would be especially appropriate given its richness in geothermal waters.

Overall, thalassotherapy grew at a faster rate than tourism as a whole for the period 2000-2007. Indeed, the number of visitors has increased by 11.1%, while the industry as a whole only registered a growth rate of 7.7%. Nevertheless, figures derived from the ONTT and cited in the article show that thalassotherapy only concerned 2.2% of tourists coming to Tunisia to spend their holidays during the same period.

Now that we defined the existing tourism landscape in Tunisia and sketched some ideas to accelerate the development of alternatives to the traditional seaside model, we will explore and analyze the data related to the origin of tourists, the country's bed capacity and occupancy rate, as well as the various projects put forward by the ONTT to protect and strengthen Tunisia's position as an attractive holiday destination for Europeans.

A public agency called StatistiquesTunisie is responsible for gathering and publishing data related to visitors in Tunisia. The latest detailed data available concerned the year 2018 ([www.ins.tn](http://www.ins.tn), 2022). What we can say from the table shown at the top of the following page is that the flow of European and North American tourists has stagnated over the last decade, while the flow of visitors from other Maghreb countries has dramatically increased and represents today the overwhelming majority.

Over the last few years, there have been continuous negotiations between Tunisia and the EU Commission to facilitate air connections between the two parties. In this regard, the creation of a common aviation area was presented by the EU Commission as an important matter in a communication published in 2008 (EU Commission, 2008). According to their review, "the Common Aviation Area represents an excellent catalyst for regional integration and economic development". Moreover, Tunisia is recognized as "an essential partner for the European Union", and the need to strengthen cooperation in the transport sector is seen as a priority.

Unfortunately, those intentions have not been translated into actions until now. Tunisia is indeed emerging from a decade characterized by the repetition of disrupting events, but this does not justify the current deadlock. This point was also raised in the interview with the advertising manager of the ONTT. To attract and retain visitors from Europe, the prevalence, prices and administrative issues related to air travel have to be addressed.

Table 2: Visitors' origin

**NON-RESIDENT BORDER ARRIVALS BY COUNTRY OF ORIGIN**

Source: ONTT

Year: 2018

COUNTRY OF ORIGIN	2016	2017	2018	GAP IN % (2017 TO 2018)
<b>TOTAL</b>	<b>5,724,021</b>	<b>7,051,813</b>	<b>8,299,040</b>	<b>17.7%</b>
Total non-residents foreigners	4,525,762	5,742,639	6,921,242	20.5%
Tunisians living abroad	1,198,259	1,309,174	1,377,797	5.2%
<b>TOTAL EUROPEANS</b>	<b>1,415,334</b>	<b>1,698,381</b>	<b>2,412,306</b>	<b>42%</b>
French	390,684	570,518	781,709	37%
Germans	129,085	181,377	275,296	51.8%
English	23,428	27,956	123,585	342.1%
Italians	71,982	87,616	102,575	17.1%
Scandinavians	9,525	12,463	17,058	36.9%
Swiss	18,157	23,423	31,169	33.1%
Belgians	22,946	50,518	97,744	93.5%
Dutch	7,740	11,150	22,638	103%
Austrians	5,319	11,521	18,649	61.9%
Spaniards	11,904	15,835	19,788	25%
Russians	623,397	515,804	599,032	16.1%
Ukrainians	11,271	23,436	21,209	-9.5%
Czechs	30,586	61,862	93,883	51.8%
Poles	11,041	17,010	70,524	314.6%
Other	48,269	87,892	137,447	56.4%
<b>TOTAL NORTH AFRICANS</b>	<b>2,985,455</b>	<b>3,881,719</b>	<b>4,309,688</b>	<b>11%</b>
Algerians	1,808,315	2,497,788	2,728,011	9.2%
Libyans	1,117,007	1,318,956	1,504,018	14%
Other	60,133	64,975	77,659	19.5%
<b>TOTAL AMERICANS</b>	<b>25,388</b>	<b>32,776</b>	<b>42,433</b>	<b>29.5%</b>
Americans	15,286	18,659	23,165	24.1%
Canadians	8,929	12,253	17,067	39.3%
Brazilians	1,173	1,864	2,201	18.1%
<b>TOTAL ASIANS</b>	<b>9,934</b>	<b>22,273</b>	<b>33,397</b>	<b>49.9%</b>
Japanese	1,379	1,875	5,454	190.9%
Chinese	8,555	20,398	27,943	30%
<b>TOTAL OTHER</b>	<b>89,651</b>	<b>107,490</b>	<b>123,419</b>	<b>14.8%</b>
Middle-Easterners	37,414	43,917	48,177	9.7%
Africans	37,044	44,774	49,839	11.3%
Australians	1,117	1,830	1,847	0.9%
Other	14,076	16,969	23,556	38.8%

Source: ONTT 2018 report. Available from:

<https://www.ontt.tn/sites/default/files/inline-files/Tourisme%20en%20chiffres%202018.pdf>

**Figure 4: Syphax airlines**



Source: Tour Mag. Available from:

<https://www.tourmag.com/photo/art/grande/8251576-12902034.jpg?v=1441961195>

*Note: The Syphax airlines company was founded by the businessman Mohamed Frikha in 2011, driven by the ambition to challenge Tunisair's dominant position, with the help of the Open Sky Agreement negotiated with the EU. Unfortunately, the company went into financial trouble a few years later and is largely seen as a symbol of the deteriorating economic conditions prevailing in Tunisia since the Jasmin Revolution.*

**Table 3: Key statistics about tourism in Tunisia**

	2010	2018	2019	Gap in % 2019/2018
<b>Tourism revenues (in billions of Euros)</b>	18,57	1,324	1,170	29.2%
<b>Arrivals at the borders</b>	7,828,075	8,299,040	9,429,049	13.6%
<b>Total nights</b>	35,565,104	27,074,650	30,018,511	10.9%
<b>Nights by residents in local hotels</b>	3,429,478	5,862,175	5,714,063	-2.5%
<b>Occupation rate</b>	44.9%	40.9%	44.6%	3.7%
<b>Available capacity (number of beds)</b>	240,077	237,618	236,015	-0.7%
<b>Exploited capacity (number of beds)</b>	177,529	181,641	184,361	1.5%

Source: ONTT 2019 report. Available from:

<https://www.ontt.tn/sites/default/files/inline-files/rapport2019.pdf>

The data from the 2019 annual report of the ONTT indicate that bed capacity remained stable over the period 2010 to 2019. There are roughly 236,000 beds available for tourists in the country. The average occupancy rate in 2019 was 44.6% (ONTT, 2019). One section of the report is dedicated to the alternative forms of tourism as opposed to the dominant seaside resort model.

The ONTT explains that Tunisia developed an over-dependence on seaside tourism and initiated a diversification process to “respond to the desires of a younger, more mobile visitor profile, more sensitive to the cultural and ecological dimensions”. As part of this strategy, the ONTT supported several projects linked to alternative forms of tourism. Among them, there is one project aiming at protecting biodiversity and promoting ecotourism in three national parks located in desert areas.

To summarize this section of the report, we began by detailing the historical development of tourism in Tunisia after its independence from France was gained in 1958. The government has always remained a central actor in this sector, from the Bourguiba period up to this day. Today, the ONTT plays the role of a facilitator and represents Tunisian’s interests abroad.

We also analyzed the country’s positioning, offer, as well as the visitors’ profile to have a better understanding of the current situation. The dependency on the traditional model of all-inclusive packages in seaside resorts is widely recognized as a critical issue to be addressed by the ONTT. We explored alternatives to this type of tourism, which may play a greater role in the future.

We will now turn to the analysis of the data collected from 114 individuals. The main purpose of the analysis is to have a better understanding of the perception of Tunisia as a holiday destination by European (mostly Swiss) citizens. We will then compare the results with Tunisia’s positioning and the actions undertaken by the ONTT to determine whether the offer aligns with the demand.

## **3.2 Data analysis**

### **3.2.1 Survey introduction**

Before entering into the analysis, we will give some contextual information about the survey and the methodology. The survey was published on the 15<sup>th</sup> of March 2022 and the data were collected until early April. 108 answers from the French version of the survey were collected, while 6 responses were recorded through the English version. 15 people answered through social media, and 99 people answered with an anonymous link they received either by mail or private message.

The initial goal was to have a sample as representative as possible of the general population. Given that the respondents were recruited among people from the professional, familial, and academic network of the author, as well as people from the professional circle of close relatives, this objective cannot be said to have been completely achieved. This is particularly evident from the results to the question: *have you ever been to Tunisia?* Indeed, it is very unlikely that about half of the Swiss population visited the country. We should keep this in mind when analyzing the results.

In terms of demographics, 53 men and 34 women completed the questionnaire until the end. The other respondents were excluded earlier in the survey as they categorically rejected the prospect of going on holiday in Tunisia, hence they did not have an interest in answering the analytical part of the questionnaire.

35 people aged 25 years old or below were part of the sample group, as well as 23 people aged between 26 and 35 years old, 12 between 36 and 45, 7 between 46 and 55, 9 between 56 and 65, and only 1 above 65. Compared to the general population, the sample group is much younger, as the overwhelming majority has not reached 35 years old, while the median age in Switzerland was set at 42.7 years in 2020 (Office fédéral de la statistique, 2021).

One practical implication of this observation is the fact that most respondents do not have children. Indeed, only 28 of them indicated having one or more children. This is not necessarily problematic, but we will have to keep this consideration in mind when analyzing the results.

The next demographic question was related to the level of education. It appears that most of the sample went to university and got a bachelor's or a master's degree. 63 people are in this situation. The others are either still on their way to a bachelor's degree or chose another path, namely a professional qualification (CFC or specialized maturity).

Regarding their current professional status, most respondents are either students or employees. However, we still have a substantial minority of people either responsible for a team, manager, or entrepreneur. The final remark is related to the average monthly income. In this case, the answers are remarkably diverse. Apart from the 17 people who preferred not to answer, the rest of the sample is evenly distributed in each revenue bracket.

### **3.2.2 Results interpretation**

In total, the questionnaire was composed of 19 questions. In the section above, we presented the answers to the questions related to demographic factors, which were located at the end of the survey. We will now look at the results of the analytical questions asked right before the demographic ones we already discussed.

*Note: the pictures and comments made below are mostly linked to the French version of the survey, as most responses were recorded in this language.*

#### **What comes to your mind when you hear about Tunisia?**

The first question was entitled: what comes to your mind when you hear about Tunisia? This was an open question, and the goal was to identify answer patterns and begin the survey with spontaneous answers before the respondents become biased because of the questions asked.

Apart from the meaningless answers, 4 types of comments have been identified:

1. Beach, sea, sunshine, heat and seaside holidays atmosphere
2. History, recent events, and political turmoil
3. Geography, including landscapes and other natural characteristics (olive trees, desert)
4. Other comments encompassing several dimensions mentioned above and additional themes such as food, culture, and Tunisian sense of hospitality

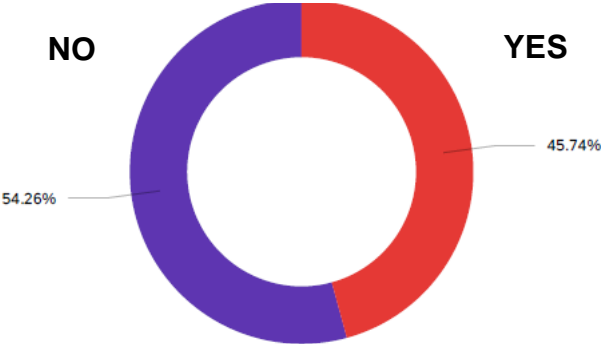
Generally speaking, the majority of the answers mentioned elements that can be linked to summer holidays (sun, beach, sea, heat). Quite surprisingly, the comments related to the events of the last decade, such as the 2011 revolution were rare. By contrast, there were more remarks on the geographical location of the country, which is both a member of the Arab world and very much linked to the West because of its history and its strategic position south of the Mediterranean Sea.

Finally, quite a few respondents talked about cultural features, such as food, souks, camels, and museums.

The fact that the respondents knew that the survey was about tourism in Tunisia beforehand by reading the introduction might have influenced their answers. Even in this case, the observation we can make is that Tunisia is largely perceived as a seaside destination, a place to visit during the summer season. It appears that the other attractions such as the desert, museums, and the monuments inherited from the Carthage period and the Islamic civilization are either unknown or secondary elements in the eyes of Swiss residents.

**Have you ever been to Tunisia? If yes, can you describe your experience in a few words? If not, would you be considering going on holiday there? Why?**

**Figure 5: Have you ever been to Tunisia?**

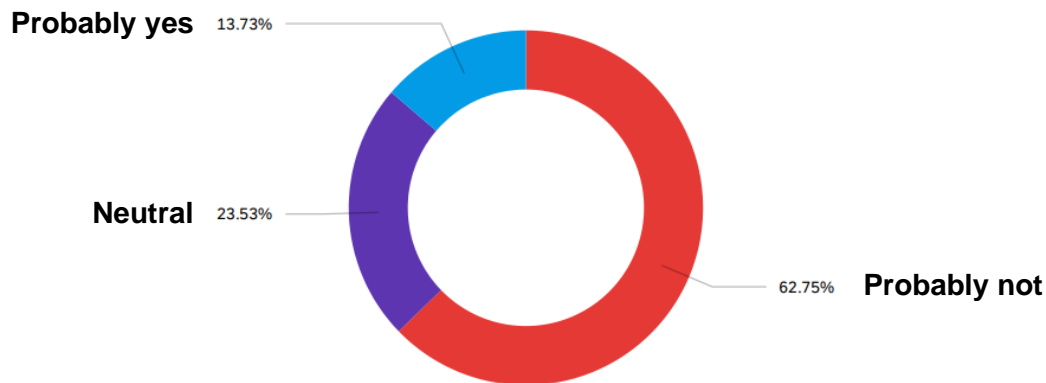


The purpose of question 2 was to divide the panel into two distinct groups people that have already been to Tunisia and those who have not visited the country yet. About half of the people answered “yes” to this question, while the other half answered “no”. The proportion of people who have already visited Tunisia is higher compared to the general population. Nevertheless, this is not a problem given that building a sample representative of the general population was not a major concern. Rather, we tried to get a fairly accurate representation of Tunisia’s perception among a diversified panel. Therefore, it is positive to have a substantial number of people in both groups. This strengthens the credibility of the results obtained through this survey.

People who answered positively to Q2 were asked to describe their experience in a few words. Unsurprisingly, the answers correlate strongly with the ones expressed in Q1. Most respondents highlighted their holiday memories in tourist places located along the coastline. The sense of hospitality was underlined by several respondents once again. Some of them also appreciated the possibility to speak in French with the staff working in hotels. It seems like the contact with local people was quite limited for most visitors. The hotels and their quality infrastructures seem to provide a safe environment, which is not so easy to escape. As explained in the introductory part, the whole tourism strategy envisioned for the European public and put forward in the 1970s and 1980s revolved around all-inclusive packages in high-standard residences. The effects of this approach are still felt to this day.

For people who answered “no” to the previous question, a sub-question was asked: *would you consider going on holiday to Tunisia?* The responses we got from this question are worrying. Indeed, about two-thirds of them said that Tunisia was not an appealing touristic destination for them. Interestingly, we notice a sharp contrast between people who already visited the country and those who did not. The overwhelming majority of the comments collected from visitors are positive. As analyzed earlier, Tunisia is seen by them as a welcoming place, offering a pleasant environment for summer vacations.

**Figure 6: Do you consider it a potential destination?**



To better understand why Tunisia is not considered a potential holiday destination by most people, we will have a look at the remarks left by respondents to support their answers. Indeed, people who said they feel attracted by the country were asked to justify their position. The responses can be classified into 3 main categories:

1. Insufficient knowledge about the country, fear of the unknown
2. Holiday destinations have to be carefully selected because of time constraints, and other countries appear higher on the list
3. Lack of interest, cultural barriers

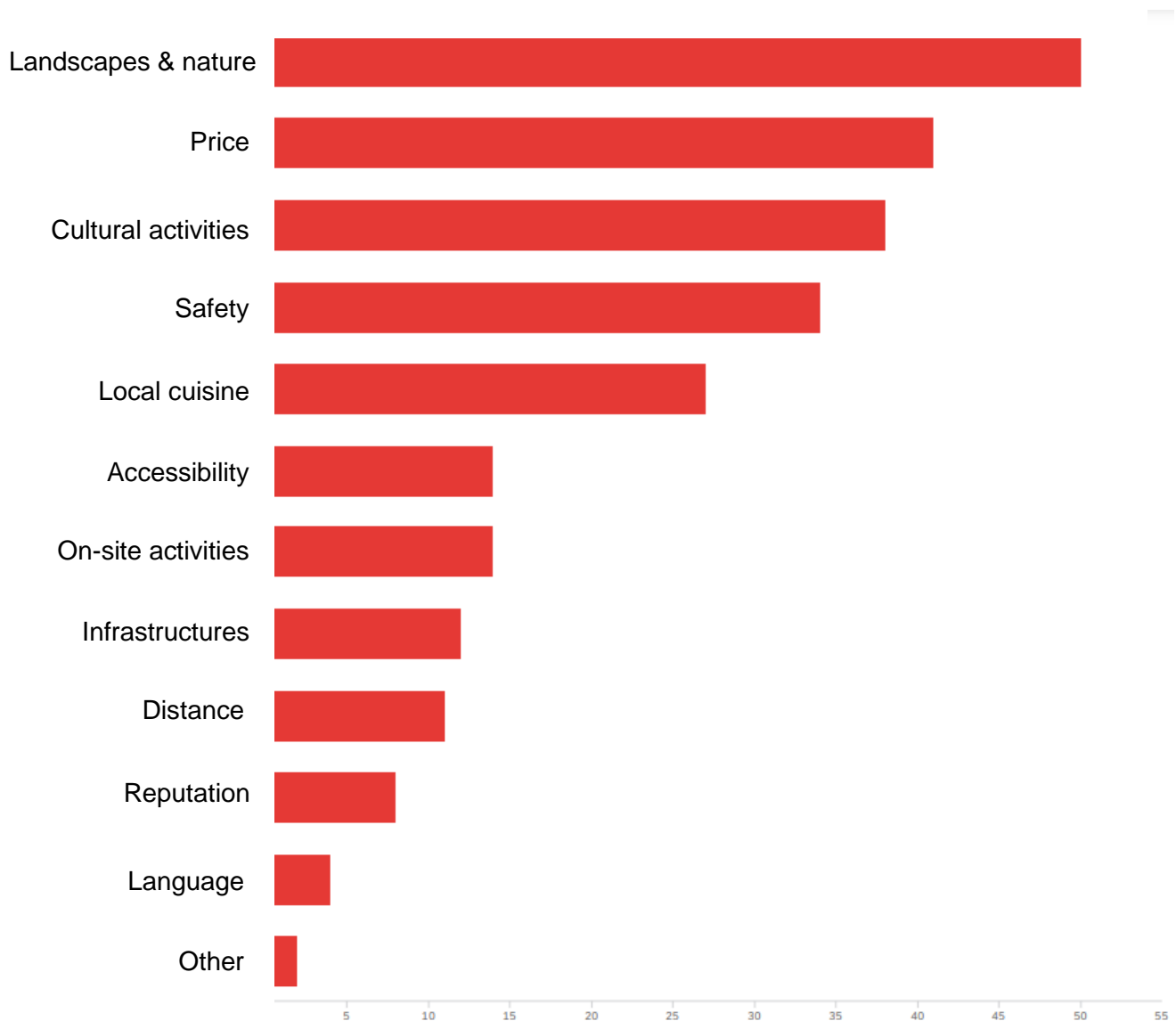
The main takeaway from this question is the fact that the tourism industry is very competitive and it is complicated for countries with limited resources to allocate for advertising purposes to position themselves among the most desirable destinations in the eyes of visitors from European countries. Nevertheless, one reassuring fact is that once the entry barrier is overcome, visitors are willing to come back as they mostly appear to have enjoyed their experience in Tunisia.

### **How often do you travel abroad for vacation?**

The following two questions were related to people's travel patterns. To begin with, we started by asking people about their traveling frequency habits. Then, we raised a question about the criteria that matter the most when choosing a holiday destination. We will use the answers to the first question later when we will make a cross-tabulated interpretation of the results to fine-tune the analysis. Such operation will allow us to test some hypotheses for instance whether Tunisia might appeal more to people traveling abroad several times per year. Indeed, we saw with the previous question that Tunisia was often not considered a potential holiday destination given the higher attractiveness of other countries. As such, the data collected here are not very helpful in providing clues to answer the research question.

## What criteria matter to you the most when considering a holiday destination?

**Figure 7: Important criteria when choosing a holiday destination**



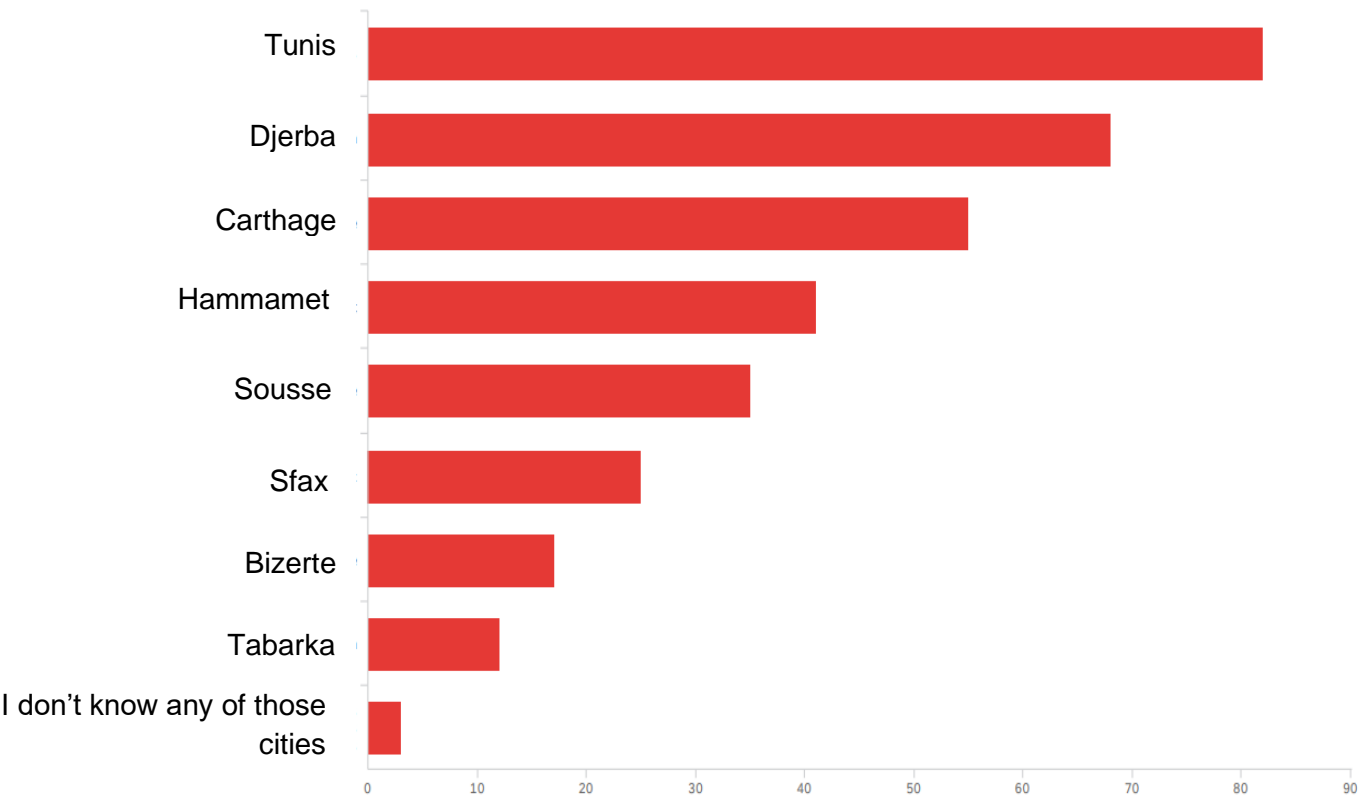
We will now turn to the question of the criteria looked upon when choosing a holiday destination. This was a multiple-choice question, as the purpose was to identify a few critical elements and try to determine Tunisia's position on each of them. Later on, we will also compare the results to this question with the ones related to the perceived competitive advantages of Tunisia asked at the end of the analytical section. In order of preference, here are the five most important criteria raised by the panel:

1. Landscapes & nature (53)
2. General price level (43)
3. Cultural activities (43)
4. Feeling of safety (34)
5. Local cuisine (29)

The other propositions, such as the diversity of activities, distance, accessibility, reputation, language barriers, and the quality of the infrastructures were mentioned less than 15 times. Those results may help political authorities define the main priorities when it comes to the conception of a long-term tourism development strategy. Nevertheless, we should keep in mind that decision-makers do not have so much control over some of the criteria listed above. For instance, the general price level depends on several factors that are not easily manageable. By contrast, the preservation and promotion of natural assets, the richness of the cultural offering, and the level of support to local gastronomy are factors that can be influenced by political decisions, with a potentially positive impact on tourism development.

**Which of these cities do you know by name?**

**Figure 8: List of Tunisian cities**



This question was entitled: *which of these cities do you know by name?* The proposed list included 8 cities with either a solid background in welcoming European tourists or playing a strategic role in the Tunisian economy because of the size of their population. Only four of the eight cities proposed are known by 40 respondents or more:

1. Tunis (88)
2. Djerba (69)
3. Carthage (60)
4. Hammamet (42)
5. Sousse (40)

The other cities (Sfax, Bizerte, and Tabarka) were cited 25 times or less. The case of Tabarka is particularly interesting to look at. This place, located on the border with Algeria, in the extreme northwest of Tunisia was supposed to become a new economic zone conducive to the development of tourism. In an article written in 2000 for the *Revue Tunisienne de Géographie*, the German scholar Andreas Kagermeier explained that a specific area located in the east of the city center was supposed to become a special hotel zone, like the one built in Port-el Kantaoui (near Sousse) in the 1970s and 1980s (Kagermeier, 2000).

According to Kagermeier, the initial plan of the authorities was to distinguish Tabarka from the other touristic areas by targeting in particular European visitors with a higher level of income. In reality, the hotels built in Tabarka were relatively similar to the ones in Hammamet, Port-el Kantaoui, or Djerba. Moreover, the weather conditions on the North coast are not as ideal as the ones in the East to develop seaside resorts. Finally, the infrastructure problems (tiny airports, poor road connections) complicated the matter further. As a result, Tabarka became one of the most popular holiday destinations for Tunisian people from higher social classes, as well as visitors from neighboring countries, but it remains largely unknown to European people as shown by the results of this survey.

### **What is your perception of Tunisia as a holiday destination?**

This was one of the most important questions of the questionnaire. It was an open- question directly linked to the main research question. The objective was to understand how Tunisia, as a holiday destination, was perceived by the panel. Overall, we can identify five types of answers:

1. Good destination to relax and spend time on the beach under sunny conditions
2. Good price/quality ratio
3. Hotels are seen as “tourist bubbles”, and it appears to be difficult to escape hotels and get in touch with locals
4. Real cultural potential, insufficiently exploited
5. Safety concerns, especially for women

As we can see, some of the answers are comparable to the ones expressed at the beginning of the survey. The most prevalent type of comment is once again related to the perception of Tunisia as a seaside destination. However, some respondents appear to regret that tourism has been constrained in dedicated areas, while large parts of the country remain hard to access. Others underlined the potential for the development of another form of tourism, around the cultural assets of the country.

In a recent article, the French newspaper *Le Monde* also expressed concerns about the current state of cultural tourism in Tunisia (Blaise, 2022). The case of the Bardo museum closed since President Saied’s decision to suspend parliamentary activities in the summer of 2021 was the object of the article. This place holds one of the largest collections of mosaics in the world, and attracted more than 1 million visitors every year before the events of the last decade, more than 10 percent of the total number of tourists that visited the country in 2019 (data.worldbank.org, 2021). In fact, the museum never really recovered from the 2015 terrorist attack that killed 22 people. Since then, no more than 40,000 tourists per year visited the place.

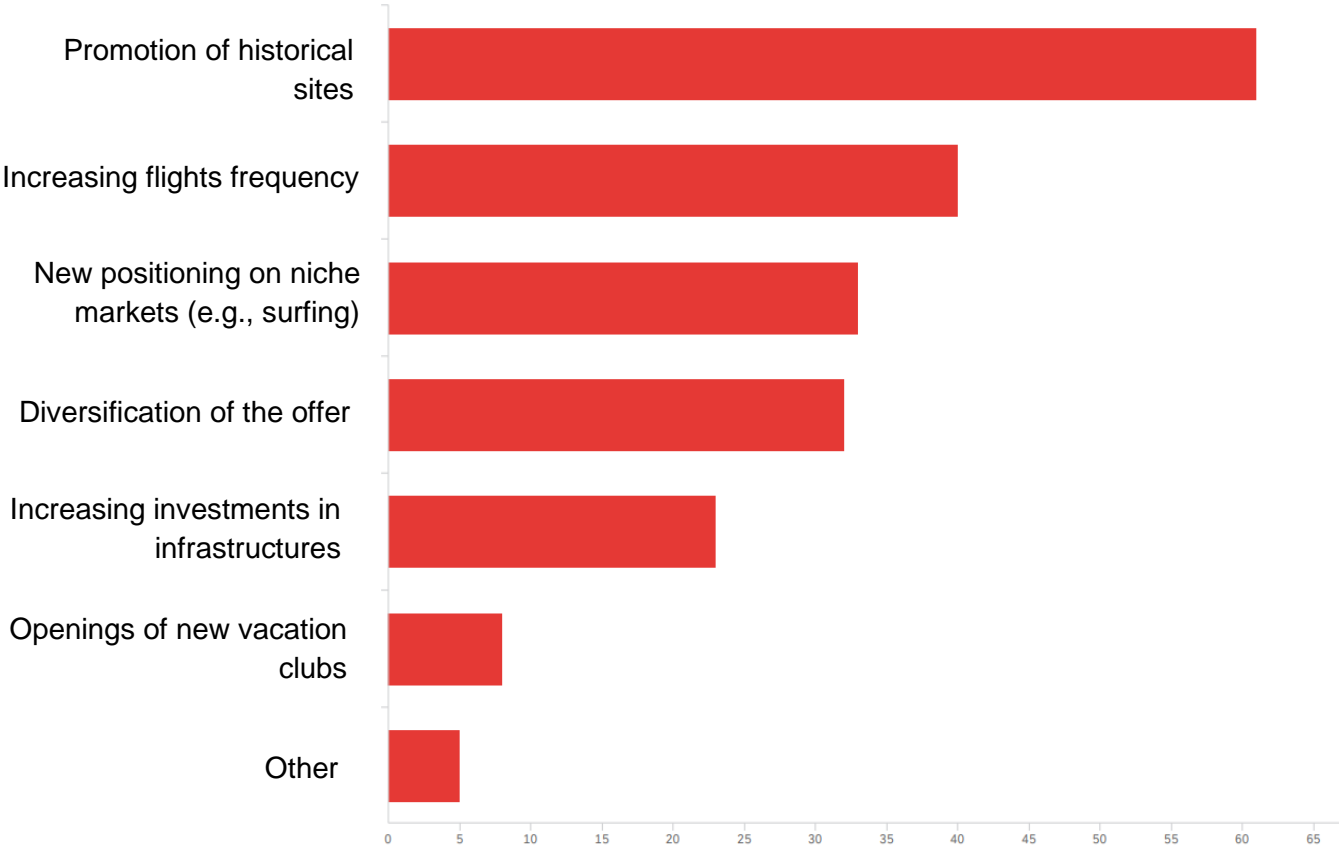
The last type of answer to this central question was related to safety concerns, a problem that is particularly difficult to solve, as it is linked to subjective feelings rather than objective measures. This issue is even more problematic for women, who fear for their integrity when traveling alone. In a 2017 survey on 19 megacities and relayed by the BBC (Cairo ‘most dangerous’ megacity for women - survey, 2017), Cairo was described as the “most dangerous” for women. Generally speaking, Muslim countries are seen as “less welcoming” compared to western ones for women.

Moreover, Tunisia was presented by the authorities as a model of political, economic, and social development under the rule of Ben Ali (Cavatorta and Haugbolle, 2012). Since 2011, the reputation acquired abroad was severely damaged, not only by the terrorist attacks but also by the arrival in power of the Islamic party *Ennahda* and the rise of more radical ideologies on the Islamic identity of Tunisia.

As a result, other countries with a large Muslim majority such as Morocco and Turkey put forward their attachment to the values of secularity, tolerance, and coexistence between religious communities. They appear today as more welcoming than Tunisia for a lot of visitors.

**In your opinion, which measures should be taken to make Tunisia more appealing to Swiss tourists?**

**Figure 9: Measures to be taken**



Now that we asked people about their perception of Tunisia as a holiday destination, and we have a rather solid understanding of the country's positioning, it is time to look out for solutions to the issues raised earlier.

Question 7 interrogated people about the most important measures that have to be taken shortly to reinforce Tunisia's attractiveness through a multiple-choice question. Respondents were allowed to select three answers from the list. Interestingly enough, we can identify a correlation between the results of this question and those expressed in the previous one. A greater emphasis should be put on the promotion of historical sites, such as Carthage, Djerba, El Jem, and Kairouan. This was by far the most popular option. The second choice was to improve the country's airline sector by increasing both the flight frequency between Europe and Tunisia and also making it more affordable.

The project of a common aviation area between Tunisia and the EU has been on the table for a very long time. In 2008, the Commission communicated on this topic and expressed the will to develop such an area with the countries located at its eastern and southern borders as part of its Neighborhood Policy (EU Commission, 2008b). Morocco was the first to join this sectoral common market by signing the first Euro-Mediterranean agreement in December 2006. In its communication paper, the EU Commission stresses the point that about 20% of international flights outside the Community are with neighboring countries. This represents roughly the same number of flights as those going to North America.

Regarding Tunisia, about 73% of the country's imports come from Europe and 31% of the country's exports go the other way. Overall, the total trade value reaches 16 billion euros. The Commission also put forward some figures for the tourism industry. Even if they are a little bit outdated, those figures provide an order of magnitude that is important to keep in mind:

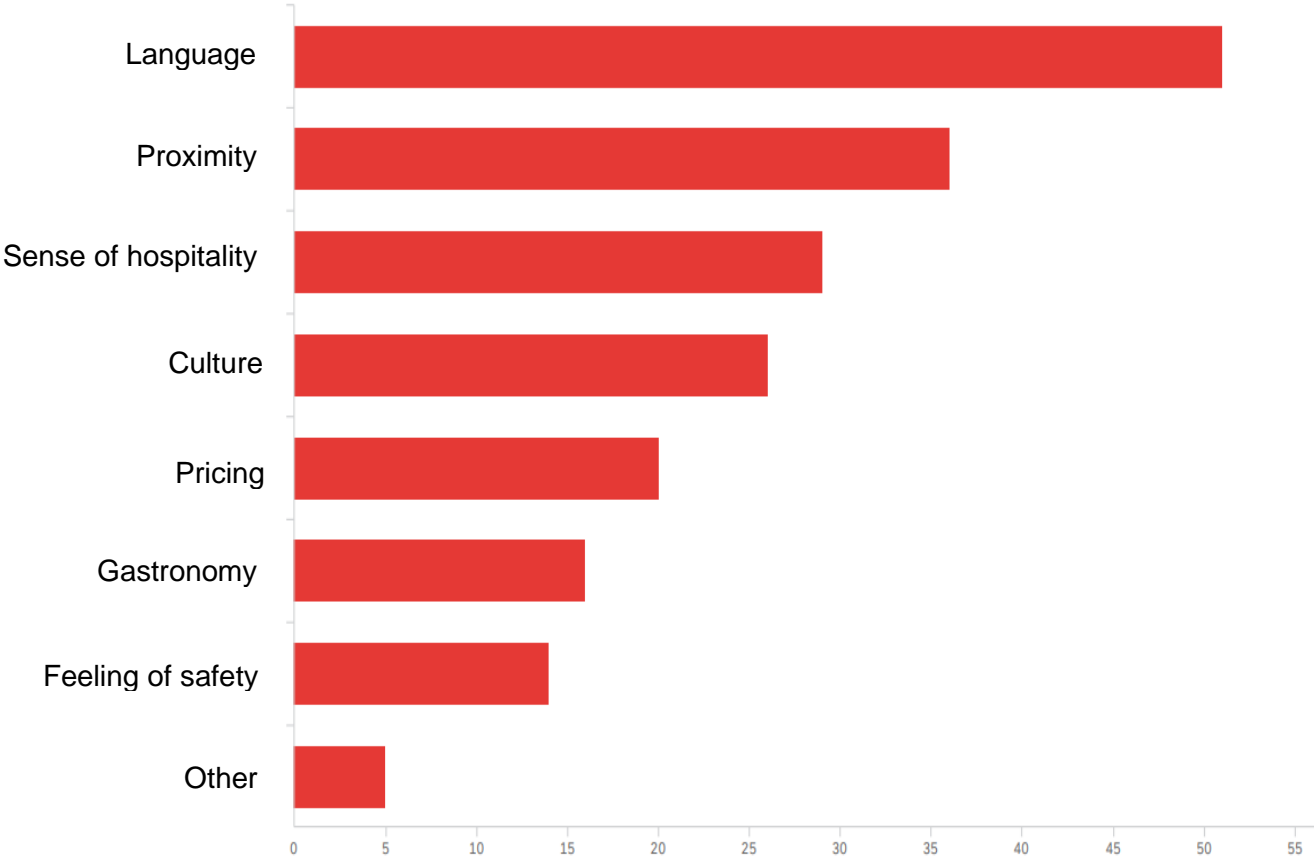
- 8.5 million passengers were carried between Tunisia and Europe in 2007
- 40% increase over ten years (1997-2007)
- Four main markets: France, Germany, Italy, and the UK
- Total number of international passengers carried to Tunisia in 2007: 10.5 million

According to the Commission, there is a huge potential for further development, if the constraints faced by foreign carriers trying to enter the Tunisian market are eased. Indeed, about 70% of the traffic is still operated by Tunisian companies, which do not always provide a level of service aligned with the price charged.

The other ideas that received a substantial level of support are related to the diversification of the tourism industry. More than 30 people agreed with the statements saying that Tunisia should imagine a 4-seasons tourism strategy and position itself on niche markets targeting a very specific public.

**In your opinion, what are the competitive advantages of Tunisia compared to other popular destinations in North Africa (Egypt, Morocco)?**

**Figure 10: Tunisia’s strengths compared to neighboring countries**



At this point of the analysis, we enter into the comparative section between Tunisia and other popular destinations in North Africa, which is the last part before the demographic question presented in the introduction to the results’ analysis. To begin with, we asked about the comparative advantages of Tunisia against its most serious competitors: Morocco and Egypt. The last question was presented in the form of a multiple-choice question with the possibility to select a maximum of three options. Naturally, the answers collected here and through the next question are not objective measures of Tunisia’s strengths in comparison to the other two countries, but rather subjective perceptions from people that have already visited the country or not.

The most prevalent answer by far was the ability to communicate in French with locals. This may seem quite logical, given that the teaching of French is not as developed in neither Morocco nor Egypt and that the survey was mainly conducted with French speakers living in Western Switzerland.

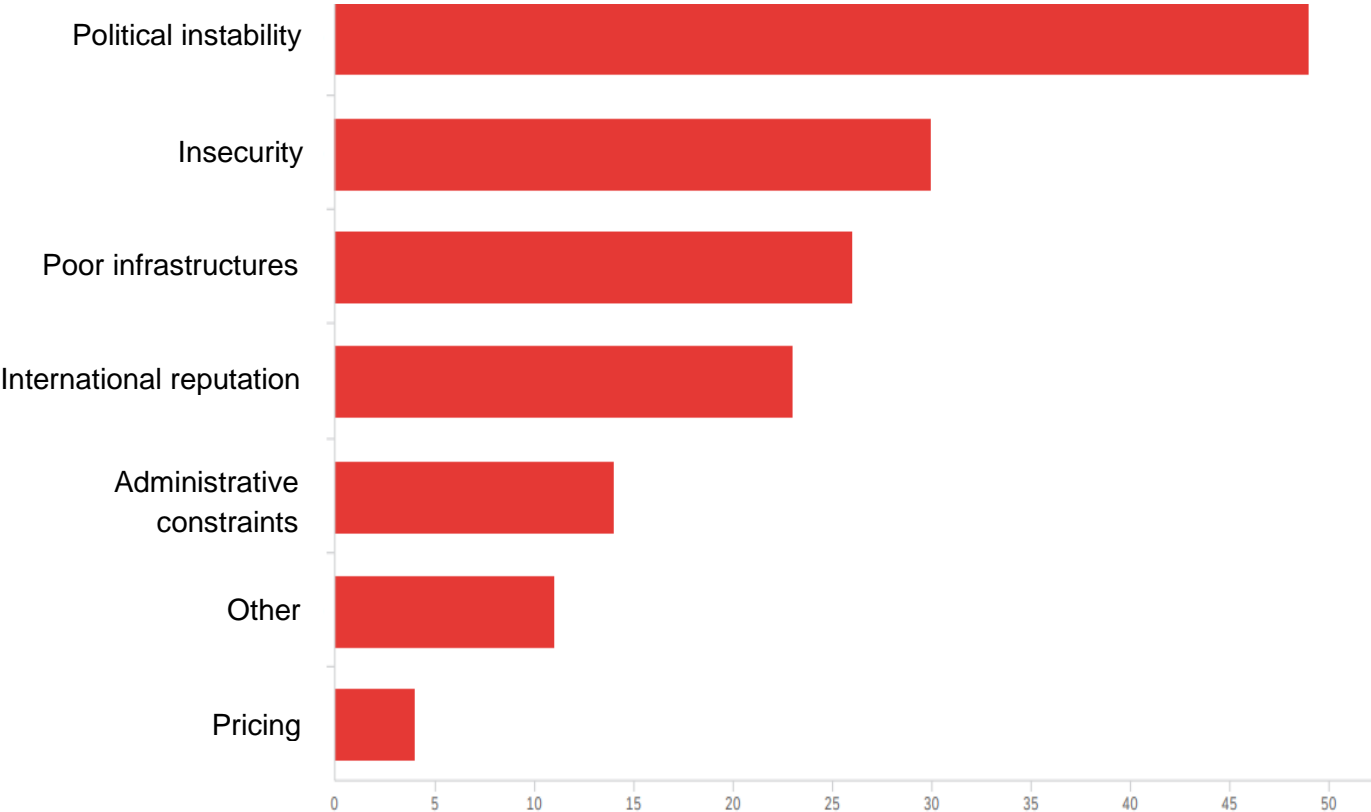
French is still the second official language of the country after Arabic. The national education system was reformed at the beginning of the 1990s. Nowadays, the elementary school curriculum lasts for a total of nine years. Primary school lasts for six years and secondary school for three years. In practice, most students continue for an additional four years in high school to get their baccalaureate, which paves the way for university (Ben Jemia, 1998).

The point here is that French is still the first foreign language taught to schoolers and it is possible to ask for public services to be delivered in this language. This reality is the result of history and the attachment of the authorities to preserve what is seen as a precious heritage.

Behind this factor, the geographic proximity, the welcoming nature of Tunisian people, and the rich cultural past of the region have all been among the most popular options chosen here.

**In your opinion, what are the weaknesses of Tunisia compared to Egypt and Morocco?**

**Figure 11: Tunisia’s weaknesses compared to neighboring countries**



A fair analysis not only has to look at the strengths but also the weaknesses. Therefore, we asked the reverse question and interrogated people about their perception of what may constitute weaknesses in comparison to the other two North African countries relying heavily on tourism for their economic prosperity.

The most recurrent answer by far was related to the unstable political climate prevailing in Tunisia since 2011. The second most selected option was the feeling of insecurity, which can be linked to unstable political conditions. Then, the poor state of the infrastructures as well as the country’s international reputation seems to play a role as well. The other options, such as the administrative constraints and the general price level do not appear to play a significant role.

Overall, the results emphasize the importance of political factors. This is not necessarily a negative observation, as those aspects are of a conjunctural rather than a structural nature. Proactive action from the government's side, and public-private partnerships represent potential ways to tackle the issue.

However, the political climate prevailing in Tunisia is far from being pacified, especially compared to Egypt and Morocco. Institutional stability remains a long-term objective.

### **3.2.3 Survey conclusion**

The purpose of this survey was to better understand the perception of Tunisia as a holiday destination from Swiss people that are not necessarily familiar with the country. Moreover, we wanted to explore the potential for further developments in the industry and confirm or reject our hypotheses, while elaborating new ones about the strategy that has to be adopted and implemented to strengthen Tunisia's positioning.

After ten years of huge disruptions at all levels (political, social, economic, security), the tourism industry has to reinvent itself to survive and continue its development. Even though the purpose of this survey was not to make a detailed comparison of the pre and post-revolution periods, it represents a good indicator to evaluate the country's current positioning, especially compared to its main competitors in the region.

Historically, Tunisia has always maintained strong ties with European countries, primarily the ones with which it shares geographical proximity (Italy and France). This reality was reflected in the proportion of tourists coming from the old continent. Indeed, as much as 82% of them were coming from Europe before the revolution, according to the figures of the EU Commission previously mentioned.

However, the events of the last decade have completely transformed the profile of the tourists visiting Tunisia. The last figures published by Statistiques Tunisie in 2020 demonstrate the gradual increase of visitors coming from the Maghreb. They represent nowadays a majority. Does this mean that tourism from Europe will ineluctably continue to decline?

This is highly unlikely, and the data collected from the survey tend to support a reasonably optimistic perspective on this topic. On the one hand, most respondents that have already visited the country reported a high level of satisfaction and seemed willing to renew the experience in the future. On the other hand, people that have never been to Tunisia and did not appear to be particularly enthusiastic at first reported a lack of knowledge about the country, a fear of the known, or the desire to visit other destinations before considering Tunisia in their list.

Those factors cannot be considered to be crippling. Rather, they are conjunctural elements that may be addressed with ambitious policies. The assets of the country are well-known, but its fragile situation remains a major barrier for people expressing safety concerns. The impressive development of the sector during the second half of the 20<sup>th</sup> century demonstrates the effectiveness of the strategy envisioned by political authorities and its implementation in collaboration with private actors.

Within two decades, Tunisia became a major seaside destination in the Mediterranean region. This rise coincided with the democratization of flights, and the emergence of a middle-class in Europe, with limited budgets to spend a week or two abroad during the summer. The country heavily relied on its natural assets and positioned itself as a budget-friendly, welcoming destination with a touch of exoticism. The all-inclusive, vacation club model quickly became the norm and is still the dominant form of tourism today. The industry now accounts for a significant part of the country's foreign trade balance.

But time has changed and people do not have the same expectations as before. As shown in the survey, they are looking for more authentic adventures, cultural offers, as well as the possibility to travel whenever they want and not only during the summer season.

### **3.3 Interview with a manager from the ONTT**

Now that the quantitative data have been both collected and analyzed, we will confront the results with the strategic approach taken by the National Office of Tunisian Tourism (ONTT). To begin with, the initial purpose of this section is to get to know how this institutional body works, what is its mission and how does it manage to accomplish it.

We also want to listen to their opinion about the current state of the tourism industry in Tunisia, and their ideas to bounce back after a decade characterized by major disruptions. This will allow us to compare their perspective with the results of the survey and identify potential nuances or more serious misalignments between the general European public and the body in charge of the elaboration and the practical implementation of the strategy.

For this section of the work, we had the privilege to conduct a phone interview with the marketing director of the ONTT office in charge of a major European market. The manager and his team participate in tourism fairs, organize promotional campaigns on social media and collaborate with tour operators. Only certain parts of the interview are reported here. The entire script of the interview can be found in the appendix.

#### ***What is your mission as a representative of the ONTT in Europe?***

*Our main mission is to stimulate the demand and to increase the number of European people going to Tunisia. Generally speaking, our action rests upon two major axes: traditional advertising campaigns completed by collaborations with tour operators and consistent participation in fairs and exhibitions of the tourism industry organized in Europe. In addition, we organize public relations activities, such as short stays in Tunisia with journalists.*

As we can see, the mission of a representative office of the ONTT located abroad is primarily to relay and adapt the message prepared by the ministry in Tunis. The establishment of strong partnerships with tour operators is of critical importance for them.

#### ***What are Tunisia's competitive advantages to succeed in the French market? How do you differentiate against competitors in North Africa?***

*Seaside tourism is and has always been the central pillar of our strategy. In addition to that, we have a unique desert offer, as well as a strong cultural offer, which is rich and diverse. Finally, tourism related to health care is very developed in Tunisia.*

Rather than explicitly mentioning the comparative advantages of Tunisia, the manager listed in his answer the most important products that constitute the country's positioning. His answer correlates with the initial analysis made at the beginning of the report and the results of the survey. Seaside tourism remains the flagship product, while the other types of tourism are presented as complementary to this offer.

**According to you, is there enough awareness of these offers, or is there still a lot of outreach work to be done?**

*The seaside offer indeed remains the easiest to promote, especially for tour operators. Attractive offers and discounted prices can be proposed, even more so at this time of the year (spring). The lack of flights from Europe to the south-western region (Tozeur) is a major impairment to the development of desert tourism. Also, the short stays we organize in Tunisia with journalists have to be restarted after the pandemic.*

From this answer, it appears to exist a fear of the unknown, in the sense that the attachment to a form of tourism revolving around seaside offers remains very strong, for historical, but also practical reasons. The existing infrastructures are designed for this type of tourism, and Tunisia is known for it. The ideas mentioned by the manager may help to set in motion a new dynamic for other segments of the offer, such as desert tourism.

Nevertheless, the objective is to put in place a model that is both coherent and complementary. Seaside tourism will remain the core product in the summer season, while the other products will help in the pursuit of the vision to position Tunisia as a truly 4-season destination.

**According to you, what are the expectations of the typical European tourists, and which elements represent Tunisia's most valuable assets?**

*Beyond seaside tourism, the European tourist wants to learn more about the country, in other words, place their stay under the seal of discovery. The geographical proximity, but also price competitiveness, as well as cultural and linguistic elements matter. The European tourist can communicate easily and does not feel lost in Tunisia. This is a major advantage for our destination.*

This response is aligned with the answers we got in question 8 of the survey. Linguistic facilities contribute to the attractiveness of Tunisia as a holiday destination for French tourists. The geographical proximity, also mentioned by the manager, was another point identified in the survey. The analysis tends to support a good comprehension of the competitive advantages of Tunisia by the ONTT.

**Do you think that the existing tourism offer is developed enough and can answer the needs of the public? Where do you identify the room for improvement?**

*Yes, I believe that our infrastructure is suitable to welcome the number of tourists we seek to attract. We provide solid services, we have a good price/quality ratio, and our hotels are well-equipped. In terms of infrastructural projects, it is vital to guarantee better flight connections in all parts of the country. The Open Sky solution, (which aims at opening the market to competition, as Tunisair currently exercises a monopoly in most connections between Europe and Tunisia) won't completely resolve the issue but may support the growth of the sector.*

The manager's words align with the reality of the situation. According to most people, Tunisair's prices do not match up with the level of service provided. The company takes advantage of its monopolistic position to over-price, hence slowing the development of tourism, by making it less attractive for Europeans. Recently, some Tunisian airports have been allowed to authorize European companies such as Transavia and EasyJet to operate. However, it does not apply to Tunisia's largest airport, the one located in Tunis.

As emphasized before, the need for the creation of a Common Aviation Area with Tunisia was clearly expressed by the EU Commission in a communication published in 2008. It seems clear that the lack of progress in this area also helps to explain the recent developments in tourists' profiles with a decline of visitors from Europe coinciding with a sharp rise in the number of tourists coming from neighboring countries.

## **3.4 Cross-country comparison**

In North Africa, the two other countries that have developed substantially their tourism industries are Egypt and Morocco. More broadly, North African countries represent the most popular region in Africa for visitors coming from all around the globe. Other countries in the continent that have developed their tourism industry are Kenya, Mauritius, Seychelles, South Africa, and to a lower extent Zimbabwe, Botswana, Namibia, Ghana, and Senegal.

According to a chapter extracted from a book concerned with sustainable human resource management in African tourism (Dieke, 2020), the popularity of North African destinations for European tourists can be explained by the geographical proximity between the two regions, but more importantly because of the strong economic and political ties that have been consolidated over a very long time. In addition, the settlement of foreign enterprises in those countries also facilitated exchanges, both from trade and human perspectives.

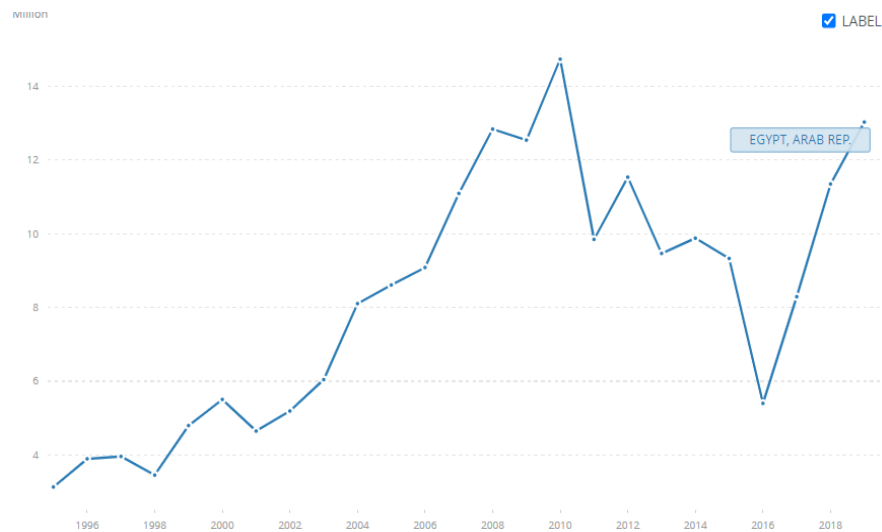
Based on the available evidence, there is a large consensus to admit that the potential for tourism in Africa is far from being exploited. Most countries lack a coherent strategy, coordinated at a state level. As a result, tourism cannot flourish as an independent economic sector but rather relies on the willingness of private actors to invest resources in that domain for its survival.

The purpose of this section of the report is to evaluate and compare the approaches to the tourism issue in the three main tourism destinations in North Africa, namely Egypt, Tunisia, and Morocco. The book's chapter mentioned above lists seven factors contributing significantly to tourism development: the three "As" (attractions, accommodation, and access), regional competition, capital investment, private sector involvement, environmental considerations, market demand, and education. In the following section, we will try to determine where the three countries we are concerned about stand on those dimensions.

### **3.4.1 Egypt**

The average annual growth rate of tourism in Egypt was set at an impressive 21.5% between 1990 and 2008, starting at 2.6 million to reaching 12.8 million three decades later. Revenues derived from tourism went from \$2.95 billion in 1995 to \$12.1 billion in 2008 according to data from the World Bank ([data.worldbank.org](http://data.worldbank.org), 2020). In 2010, the tourism sector accounted for 13% of GDP and about 11% of total employment. More importantly, tourism represented that year 22% of the country's total exports, making it the biggest exporting industry. As was the case for Tunisia before the revolution, most visitors going to Egypt come from Europe.

**Figure 12: Tourism growth in Egypt (1995-2019)**



Source: The World Bank. Available from:

<https://data.worldbank.org/indicator/ST.INT.ARVL?locations=EG>

*Note: tourism figures for Egypt for the year 2020 were still unavailable at the time of publication of this report. as opposed to figures for Tunisia and Morocco.*

In 2011, a study published in the *European Journal of Economics, Finance, and Administrative sciences* used panel data evidence to identify the determinants of international tourism demand for Egypt (Ibrahim, 2011). Based on their results, a few factors are playing a pivotal role in tourism development in Egypt. The sector appears to be very sensitive to prices, the real effective exchange rate, trade openness, GDP per capita, as well as the competitiveness of rival destinations. Those results largely support the observations from the chapter cited above.

This study isolated one of the variables mentioned above (market demand) and tried to find which other factors have the greatest influence on it. It seems that regional competition, capital investment, and private sector involvement do matter the most.

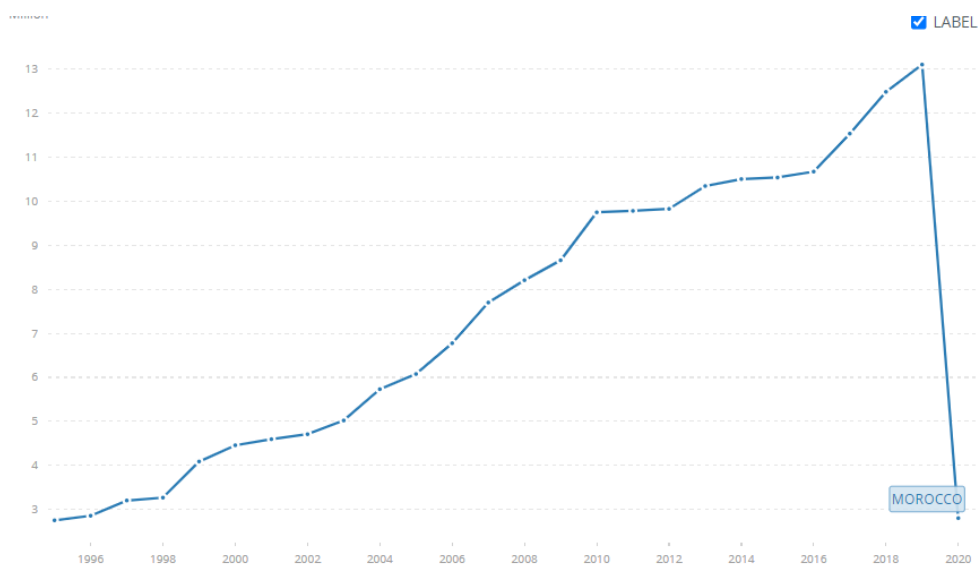
Regarding the other factors, Egypt benefits from outstanding natural attractions, and bigger accommodation compared to Tunisia or even Morocco, while ease of access is roughly the same for the average European tourist. Capital investments and private sector involvement both contributed massively to the rise of tourism over the last three decades, according to a 2008 study (Richter and Steiner, 2008). President Mubarak was at the forefront of this transformation, and tourism represented a great opportunity to offset the trade deficit.

Tourism development did not require substantial changes to the political regime. Similarities can be found in Tunisia, which engaged in the process two decades earlier. In both cases, the initial impulsion came from the government, which maintained a tight grip on the sector to capture the greatest share of revenues. Nevertheless, gradual liberalization led to the emergence of private actors and investments from abroad. Egypt leveraged its natural assets and extended the number of places conducive to tourism development.

### 3.4.2 Morocco

Morocco's tourism industry took off in the late 1960s and early 1970s about one decade after the country gained independence in 1956. Public investments in this domain went from 0.2% for the period 1958-1959 to 6.8% for the period 1968-1972 (Almeida-García, 2017). Under Hassan II (1961-1999), tourism policies were characterized by the absence of a long-term vision supported by a sound strategy. Early on, Morocco was deeply affected by external events, such as the Western Sahara issue and the effects of the Gulf War. However, the government put in place a holiday accommodation privatization scheme which encouraged private actors' involvement in the sector.

**Figure 13: Tourism growth in Morocco (1995-2019)**



Source: The World Bank. Available from:

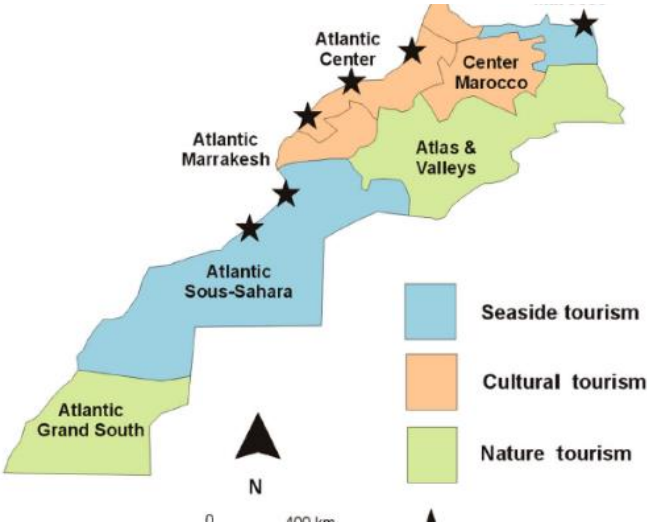
<https://data.worldbank.org/indicator/ST.INT.ARVL?locations=MA>

In his paper, Almeida-Garcia emphasized the fact that Hassan II quickly realized that the private sector was performing better and that the wisest choice to make was to support individual initiatives rather than imposing inefficient state policies. A major downside of this approach was the unequal geographical distribution in tourism development, with entire regions left behind, while others grew at a very fast pace (Agadir, Casablanca, Marrakech).

Later on, his son Mohamed VI (1999-present) changed gear and defined tourism as a driver to improve the standard of living of the population. Investments became more globalized than ever before, the state took participation in investment funds, agencies in charge of coordination were created and infrastructures were renovated to cope with the increasing demand. Even environmental considerations have been included in the reflection. In short, the state took a much more proactive stance instead of letting private actors do their own thing without any coordination.

The government’s objective is to generate and support the growth of tourism activity throughout the country. The Vision 2020 plan divides the tourism strategy into three main categories: seaside, cultural, and nature. Sustainable development is one of the five pillars of the plan, something that has been seen neither in Tunisia nor in Egypt. Also, the structural weaknesses of the industry are listed and solutions to address them are explicitly mentioned in the report from the ministry (Roudies, 2013). We can also notice from the table on the previous page that Morocco was not affected by the Arab spring and managed to sustain the growth of the industry. Whether a phenomenon of transfer of visitors to Morocco from Egypt and Tunisia occurred during this period is a question that deserves to be studied.

**Figure 14: Tourism areas in Morocco**



Source: Analysis of tourism policy in a developing country: the case of Morocco. Available from:

[https://www.researchgate.net/publication/316570266\\_Analysis\\_of\\_tourism\\_policy\\_in\\_a\\_developing\\_country\\_the\\_case\\_of\\_Morocco](https://www.researchgate.net/publication/316570266_Analysis_of_tourism_policy_in_a_developing_country_the_case_of_Morocco)

Now that we have a better understanding of the Moroccan development strategy, we can analyze them based on the factors cited in the preamble to this section. Regarding the three “As”, Morocco is working hard to promote its natural resources and make them more accessible. As we saw earlier, capital investments and private actors’ involvement are part of the strategy from the very beginning. The focus on environmental considerations and the regular reassessment of the offer to align with the demand clearly distinguish Morocco from the other two countries.

### 3.4.3 Assessment

In this tourism policy overview, we haven't spoken so far about the last factor identified by Dieke in his work cited in the introduction: education. In a 2020 work (A. H. Elamir, 2020), a researcher from the University of Bahrain performed a canonical correlation analysis to measure the relationship between two different groups of indicators. The idea was to analyze the relationship between higher education and labor market efficiency in Arabic countries using data from the World Economic Forum. To sustain its growth, tourism activity has to attract some talented workers who receive adequate training, while being as efficient as possible in terms of resource management. The results show that staff training, internet access, the overall quality of the education system, and the percentage of tertiary education involvement are among the most important factors when it comes to increasing labor market efficiency.

We could go further than merely mentioning this aspect by comparing the three countries over those dimensions but that would take us away from our main concern, which is to evaluate the three approaches and identify the factors that are the most critical when talking about tourism development.

On the one hand, there are undeniable policy similarities. Egypt, Tunisia, and Morocco all started to develop their tourism industry with an initial impulsion coming from the state. The liberalization process took some time in Egypt and Tunisia but was a reality in Morocco from an early stage. Moreover, they all attracted mainly visitors from the European continent until the 2010s. Given the recent social and political disruptions, the latest figures available showing an increased percentage of tourists from elsewhere do not reflect the evolution encountered over several decades. Finally, the geographical position of the three countries around the Mediterranean Sea means that time to access Europe stays roughly the same.

On the other hand, differences occur when we talk about positioning, attractions, and environmental considerations. Tunisia and Egypt still position themselves as mass-tourism destinations, with the emphasis being put on increasing accommodation capacity while building seaside resorts primarily active during the summer. By contrast, Morocco engaged in a diversification strategy, characterized by the willingness to promote the economic development of the country as a whole.

Naturally, the strategic decisions taken on the positioning have a great impact on the attractions proposed to tourists. As we saw earlier in this report, Tunisia neglected the cultural dimension to focus on maximizing seaside resort capacity instead. In Egypt, seaside destinations such as Charm el-Sheikh flourished, while investments in heritage preservation were recently described as "insufficient" (even though the disruptive events of the last decade surely played a role) (Franceinfo, 2017). In Morocco, the desire to increase revenues derived from tourism in all regions implied the adoption of a strategy highlighting the strengths of each of them. Instead of being the centerpiece of the strategy seaside tourism is only one component of it, along with the cultural and natural dimensions.

Finally, Morocco put a greater emphasis than its competitors on environmental considerations, as the 2020 Vision plan shows. Concretely, this translates into the establishment of specific criteria related to tourist density thresholds, water consumption, and maintenance of the cultural heritage. The explicit goal is to make *sustainability* "a distinguishing feature for Morocco".

In summary, this analysis provides interesting insights into the policy approaches taken by Tunisia's main competitors. The similarities with Egypt appear to be much more pregnant compared to Morocco. Indeed, while Egypt still relies on its rich cultural heritage to maintain its position, it heavily counts on seaside resorts to sustain its growth. By contrast, Morocco has engaged in an ambitious diversification strategy since Mohamed VI became king in 1999.

There are important lessons to draw from that. First of all, a more proactive policy approach would probably be beneficial. In addition to the publication of its annual report, the ONTT should lay out a 5-year or 10-year vision. This would eliminate some uncertainty and provide a certain level of predictability that will encourage investments. Also, the role of the state should be defined more clearly. Either it manages the entire sector by itself, as was the case in the early stages of development, or it plays the role of a facilitator, supporting investors and promoting the destination abroad. "

Second of all, diversification should be seen as an opportunity rather than a threat to the dominant, seaside-based model. The current state of tourism in Tunisia deepens regional inequalities instead of resorbing them. Every region possesses valuable resources, whether cultural, patrimonial, or material. Diversification also means less vulnerability to external events which put the industry in serious trouble over the last decade.

## 4. Discussion

In this section, we will evaluate the results from the data collection, as well as give meaning to the main conclusions from the cross-country comparison presented earlier. To begin with, we will come back to the research question and associate the central issue tackled by this research with the key findings. Then we will try to interpret the results and identify potential surprises in the outcome, we will connect them to the initial hypotheses and see whether alternative explanations are possible.

After that, the implications of the results and their alignment with the available evidence will be addressed. In this part, we will determine to what extent this research differentiates from the existing literature and whether it provides new insights into the issue at hand. Finally, we will acknowledge the limitations of the report before formulating recommendations in line with the observations and the results gathered during the research.

The purpose of this project is to evaluate the perception of Tunisia as a holiday destination by Swiss people and determine whether the offer aligns with their expectations. Beyond this rather broad description, the idea was to identify gaps, structural weaknesses, and points where Tunisia is lagging behind its main competitors in North Africa.

The survey performed with Swiss people familiar with traveling abroad provided some interesting answers to the research question. Indeed, it appears that the positioning put forward by the ONTT is largely understood by people who already visited the country as well as by people who are not familiar with it. Tunisia is described as a nearby seaside destination, offering affordable prices for the service provided. Since the emergence of tourism in the 1960s and 1970s, the model has remained the same. Tunisia still relies heavily on summer tourism, more precisely on the all-inclusive business model with the majority of the stay spent at the hotel.

Moreover, the results indicate that most cities are known only by a minority of people and that alternative offers are insufficiently exploited. Consequently, visitors looking for destinations where the cultural, social or adventure dimensions are well-developed tend to ignore Tunisia. Compared to Egypt and Morocco, Tunisia is perceived as a less secure choice. The current political situation also appears to restrain tourists from visiting the country. From a French perspective, the cultural, linguistic, and geographical proximity do represent strong competitive advantages.

The interview made with a manager of the ONTT based in Europe largely supported the results previously obtained. However, structural transformations to address the issues raised by the respondents do not seem to be on the agenda. We can reasonably think that financial constraints prevent the authorities from engaging in important reforms. However, it is undeniable that alternatives to the seaside suffer from a lack of support from the political sphere as well as a lack of capital investments.

Those results aligned with the literature written on the topic. The Tunisian model of tourism development has been studied and remains quite straightforward. Authors in this field identified early on the problems inherent to such a high reliance on seaside tourism and all-inclusive resorts located in coastal areas: regional inequalities, dependency on European support, vulnerability to external events, and underinvestment in patrimonial preservation, cultural promotion, and other activities unrelated to seaside tourism.

As a regular visitor to the country, I witnessed by myself the immobility of the authorities and the absence of a long-term vision. One surprising and rather positive observation is the replacement of European tourists with visitors coming from Arab countries. This phenomenon was particularly significant over the last decade. Historically, Tunisia has always maintained strong ties with Europe, but the collaboration is currently in a stagnating phase. Concretely, this means that the tourism policies decide for the decades to come will have to be less European-centric and have to take into account this trend.

Such discovery might change the list of factors essential to tourism development made by Dieke. Indeed, his assessment is based on a Western perspective where aspects such as capital investments, environmental considerations, or high-standard accommodation are central. In reality, the typical visitor from an Arab country may have very different expectations.

Regarding the implications of the results, they are mostly consistent with the findings of previous research made on this topic. Tourism is a volatile industry that is highly impacted by external events. The disruptions of the last decade in Tunisia correlate with a sharp decline in the number of visitors. Moreover, Tunisia would benefit greatly from the signature and application of trade agreements with the European Union. In particular, the aviation agreement and the Open Sky project related to it are perceived as a solution capable of reinforcing the country's attractiveness for European visitors. This point was also raised by the manager during the interview.

The data collected here represent a valuable contribution to the evaluation of the industry's current state and the possible trajectories that should be considered to ensure its long-term sustainability. The results suggest that a well-rounded diversification strategy should be envisioned as soon as possible. Morocco does represent a source of inspiration in that regard. Tunisia is at a crossroads and needs to take decisive action in the years to come. The country as a whole should be associated with the structural transformations of the tourism sector. Most certainly, every region possesses valuable resources to promote.

Concerning the research's limitations, the generalizability of the results is constrained by the fact that the survey was made in Switzerland with a sample that is not representative of the general population, let alone the visitor potentially interested in going to Tunisia. Moreover, an excessive portion of the sample already visited the country. It is beyond the scope of this study to propose precise policies and make projections about Tunisia's potential. The more modest objective is to evaluate where the country stands today while exploring future possible trajectories.

## 5. Conclusion

The main purpose of this report was to analyze the tourism industry in Tunisia and its development since independence, in order to make sound recommendations to reposition the country as an attractive destination for European visitors by taking into account what is being done abroad and listening to their expectations. It is undeniable that tourism contributed massively to Tunisia's rapid economic growth and the relative prosperity encountered after independence. President Bourguiba had a vision for his country and was committed to improving the standards of living of the population. Nevertheless, tourism did not solve all the country's problems and contributed to deepening inequalities in Tunisia.

In addition, the tourism sector, while much more developed compared to most African countries, remains vulnerable to external events, and the lack of investments, as well as the absence of alternatives to the traditional seaside model, are central issues that have not been addressed by the authorities for too long.

In other words, Tunisia finds itself at a crossroads. Either the disruptions of the last decade will be overcome and the country will emerge stronger, or instability will become the norm and the lack of perspectives will severely hinder its future development. The survey performed with 114 people gives us reason to remain relatively optimistic if decisive action is taken in the coming years. The results show that the country's positioning as an affordable seaside destination, offering good value at a reasonable price, is well-understood by Swiss residents. The merit of Tunisia's positioning lies in its remarkable consistency since the emergence of the industry shortly after independence.

Moreover, the strengths of the country were easily identified by the respondents: the sense of welcome of the population, high-standards hotel resorts, pleasant weather conditions year-round, beautiful coastline, and rich history associated with a remarkable architectural heritage. However, weaknesses such as political instability, insecurity, and the feeling of disconnection with the local population created by the "tourist bubbles" represented by hotels were cited as frequently as the strengths mentioned above.

If we are to maintain the optimistic approach that has characterized the critical assessment provided throughout this report, the conjunctural difficulties of the current period should be described as opportunities to engage in profound reforms aiming at reviving the sector in the long run.

For that vision to become a reality, a mindset shift has to occur in the years to come. The interview with a manager of the ONTT based in Europe gave me the feeling that the authorities are not yet ready to abandon their passive stance in favor of a more proactive one. In other words, they are waiting for the external conditions to evolve favorably instead of acting purposefully to address the chronic problems that have been largely documented.

Admittedly, financial resources are lacking and the priority of the moment is to protect the Tunisian people against the erosion of their purchasing power as well as the devaluation of the national currency. Nevertheless, it is rather worrying to notice that questioning the model that has brought success throughout the last few decades but is now showing its limits is not on the agenda.

In terms of recommendations, Morocco represents a valuable source of inspiration. Under Mohammed VI, the country began to walk away from the mass-tourism approach to include other considerations in their reflection. Among them, we can mention the desire to address regional inequalities through the inclusion of each region in the national development program, the focus on environmental concerns, and the active exploration of new opportunities with a long-term vision in mind. At the end of this paper, it is clear to me that Tunisia won't be able to ensure the prosperity of its tourism sector without the implementation of an ambitious diversification strategy.

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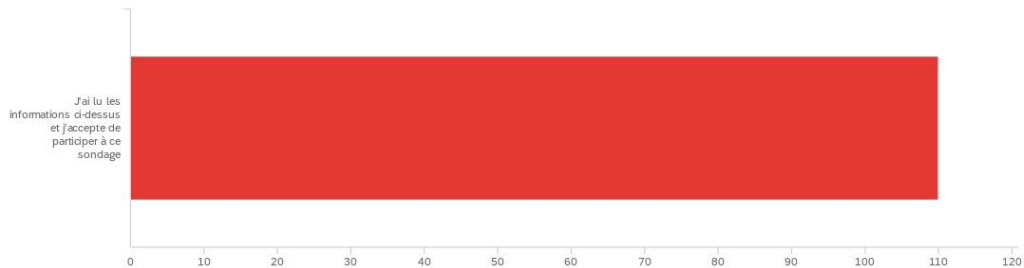
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# 7. Appendix 1: Survey report

## Default Report

Bachelor Thesis\_FR  
 June 1, 2022 3:36 PM MDT

Q1 - Bonjour et bienvenue sur mon sondage ! Tout d'abord, je tenais à vous remercier par avance de prendre le temps de répondre à mes questions. Ce questionnaire ne devrait pas vous prendre plus de 10 minutes à compléter. En cochant la case ci-dessous, vous confirmez que :- Vous avez lu et compris les informations ci-dessus- Vous avez plus de 18 ans - Vous êtes informé que les données collectées au travers de ce questionnaire seront traitées de manière anonymes et confidentielles. En cas de questions, n'hésitez à me contacter par email à l'adresse suivante : mehdi.jaballah@etu.hesge.ch



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Bonjour et bienvenue sur mon sondage ! Tout d'abord, je tenais à vous remercier par avance de prendre le temps de répondre à mes questions. Ce questionnaire ne devrait pas vous prendre plus de 10 minutes à compléter. En cochant la case ci-dessous, vous confirmez que :- Vous avez lu et compris les informations ci-dessus- Vous avez plus de 18 ans - Vous êtes informé que les données collectées au travers de ce questionnaire seront traitées de manière anonymes et confidentielles. En cas de questions, n'hésitez à me contacter par email à l'adresse suivante : mehdi.jaballah@etu.hesge.ch	1.00	1.00	1.00	0.00	0.00	110

#	Field	Choice Count
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#	Field	Choice Count
1	J'ai lu les informations ci-dessus et j'accepte de participer à ce sondage	100.00% 110

Showing rows 1 - 1 of 1

## Q2 - 1. Qu'est-ce qui vous vient à l'esprit quand vous entendez parler de la Tunisie ?

1. Qu'est-ce qui vous vient à l'esprit quand vous entendez parler de la Tun...

plage

Afrique

Les plages et le soleil. La chicha. Les vacances à la mer à djerba ou hamamet

Désert

sss

Mon ancien chef

Soleil, chaleur, sable, mer

Soleil, grands espaces désertiques, piscine, nourriture orientale

vacances et les plages

Sousse

Soleil Chaleur

Mer, soleil, chaleur, vacances

Les vacances

Vacances

Soleil

Le plus développé des pays d'Afrique

Soleil, plage, chameau, arabe, printemps arabe

Soleil, chaleur, thé, épices.

le soleil, la chaleur et un bon dépaysement

printemps arabe et ses conséquences jusqu'aujourd'hui tourisme

Carthage

O

1. Qu'est-ce qui vous vient à l'esprit quand vous entendez parler de la Tun...

Un pays chaleureux, avec une belle culture et des plats nationaux délicieux. Un pays qui fut très touristique et qui a été entaché par diverses dérives liées au terrorisme : conséquences indirectes du printemps arabe (?) C'est un pays qui bénéficie d'une industrie touristique forte.

Si j'omets la politique, je dirais vacances, soleil, chaleur absurde à faire pâlir le soleil napolitain.

Soleil, chaleur, plage, mer, couscous, chirurgie plastique

rien de particulier

Halal food

tajine

couscous, plages

Art Islamique, mosaïque romaine et la Médina

Fascinating culture, historical charm, sunny coastlines and tasty food.

Vacances

Plage et chaleur

Chameau

Vacances

La nourriture et la culture

Algerie

Rien

Plage, soleil

Révolution

Club Med

Thé à la menthe et dromadaire

Afrique, plage, plat traditionnel

Chameau, Souks

Soleil, insalubrité, insécurité, chaleureux

Dunes de sable, soleil, plage

1. Qu'est-ce qui vous vient à l'esprit quand vous entendez parler de la Tun...

Amazing beaches, colourful clothes, tasty food and camels

Couleurs

Moyen-orient

Paysage

chameau sable culture orientale souk

Sable, chaleur, détente, chameaux (cliché), nourriture

Erdogan

Drapeau

plage

Sj'djdj

Mer, soleil, plage, tourisme

Mer, Désert, des locaux chaleureux

La plage

Palmiers et plage. Grand hotels all inclusive.

La ville de Carthage, les magnifique tapis de pierre (les mosaïques), le musée du bardo et sans parler des plages et destination touristiques.

Soleil et sable des plages, nourriture épicée

Vacances et soleil

La chaleur et le soleil

Les bricks

Plage, médina, marché, paysage désertique, soleil Mais également insécurité et attentats

Pays parlant le français

Chaos, instabilité politique, migration

Pays chaud, mer, tourisme, vacances

Désert, mer et oasis !

1. Qu'est-ce qui vous vient à l'esprit quand vous entendez parler de la Tun...

Beau paysage Olivier Le chaud

++ tourisme ++ station balneaire -- printemps arabe -- benali

la mer, la chaleur, la gentillesse des tunisiens

Pays chaud, bonne nourriture, privilégié des vacanciers

Le soleil

Tunis

Au bord de la Méditerranée et à côté du Maroc

Tourisme, souk

Chaleur, plage, olives

Chaleur, femmes

Maghreb, Djerba, Tunis , plage

Les plages

Voyage, exotisme, situation politique

Soleil, visite de marchés, visite sites romains antiques, repos

Les souk, la nourriture, dromadaires, vacances

Découverte du patrimoine et de l'histoire

le désert

La chaleur

La plage, le soleil, la mer

pas cher

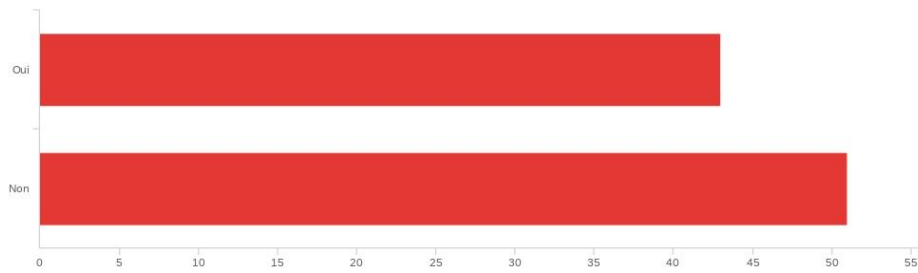
Un pays touristique qui a eu une révolution. Situation pas stable. Mais dans le passé: jolies plages, désert et une population accueillante.

ddd

La mer/le soleil

ggg

Q3 - 2. Êtes-vous déjà allé en Tunisie ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	2. Êtes-vous déjà allé en Tunisie ?	1.00	2.00	1.54	0.50	0.25	94

#	Field	Choice Count
1	Oui	45.74% 43
2	Non	54.26% 51

94

Showing rows 1 - 3 of 3

#### Q4 - Si oui, pouvez-vous résumer votre expérience en quelques mots ?

Si oui, pouvez-vous résumer votre expérience en quelques mots ?

J'étais petit, donc je n'ai que quelques souvenirs sur les balades en chameau, mais ce fut intéressant

de

Destinations: Sousse et Djerba. J'ai préféré Sousse avec sa ville et le marché à visiter. J'ai fait quelques activités dans les dunes au sud et du cheval sur la plage. J'ai bcp aimé

C'était dans un hôtel all inclusive quand j'étais petite, sur l'île de Djerba. Nous avons visité les alentours, j'en ai un bon souvenir.

J'ai eu beaucoup de plaisir, des paysages magnifiques et des gens sympas

Soleil,sable,farniente

Nous avons fait plusieurs voyages pour visiter la famille et passer des vacances. la majorité de nos voyages étaient positifs , malgré l'existence de plusieurs points à améliorer.

Souvenirs d'enfance, jeunesse, études, vacances, ...

1 Des gens très compétents, y compris en technologie, à Tunis 2 Des cadres engagés lorsque j'y suis allé pendant la période de transition 3. La majesté du désert dans le Grand Sud.

Vacances en famille à la plage, lorsque j'étais enfant.

super bien et intéressant, il faut dire que nous avons eu bcp de chance on avait un guide de qualité..... (papa jab)

Beau pays mais beaucoup de difficultés économiques et problèmes politiques...

Tu

J'y suis allé à de multiples reprises, lorsque j'étais enfant. 2x à Hammamet (2003 et 2011). 1x à Djerba (2004). Je n'ai malheureusement jamais pu me rendre à Tunis, la capitale, bien que je souhaitais visiter les nombreux musées qu'elle abrite. Mes souvenirs de Tunisie sont très positifs, je me rappelle que beaucoup de monde parlait français, et la météo était vraiment plaisante

Au début de années 90, cela devait être une expérience de découverte du pays, de ses richesses géologiques et historiques antiques. Le parcours choisi était du type sac à dos. En dehors des sentiers battus, le contact avec la population était très rude et cela nous a découragé de poursuivre notre périple. Pour finir, nous nous sommes réfugié dans un palace 5 étoiles et avons terminé la deuxième moitié de nos vacances sur une plage.

Quand j'étais petit je suis parti avec mes parents dans un ressort.

Profiter du soleil dans un environnement agréable et plein de vie

Vacances club Med, tour en bateau, plage, soleil, visites

Dépaysement, oriental, gentillesse

magnifique, les gens sont super sympathique, et le design des bâtiment blanc et bleu, c'est magnifique, j'adore l'architecture

Si oui, pouvez-vous résumer votre expérience en quelques mots ?

I've been there 2 times when I was younger, I don't remember much, but I remember the beaches, the incredible cities and colourful clothes.

Plein de culture et bonne nourriture

Aucun souvenir, trop jeune

Oui

Djshsjsh

De belles plages, beaucoup de chaleur, des découvertes et une richesse culturelle.

J'ai vécu en Tunisie pendant la plupart de ma jeunesse. La vie est très paisible en Tunisie. Les gens sont accueillants et chaleureux. Malgré le désordre dans certains aspect (trafic routier par exemple), la Tunisie est un pays à voir et à visiter.

Vacances familiales il y a 20 ans, mais beaux souvenirs des plages et plats typiques bien épicés.

Vacances touristiques en famille (visites de plusieurs lieux/monuments) et plage au bord de la mer.

Expérience très courte et peu représentative ; le contact était très agréable avec les gens sur place et donne envie d'en découvrir plus

des vacances au bord de mer, insouciantes et sympathiques

Voyage scolaire de fin d'année dans yne famille d'accueil aisé. Superbe decouverte avec balade dans médina, balade en dromadaires, dans villages troglodyte etc Yn excellent souvenir

C était il y a 10 ans, vu quelques sites (sidi ouh sais)mais déçu, expérience mal aisante : Directeur hôtel qui me réclamait des sous car soit disant sa fille faisait la collection.ou ballade en chameau à travers un village très pauvre...

Je suis allé à Djerba en automne pendant 1 semaine , c'était magnifique

Divers club de vacances

Belle semaine au bord de la plage: repos et visites touristiques. Très bon accueil

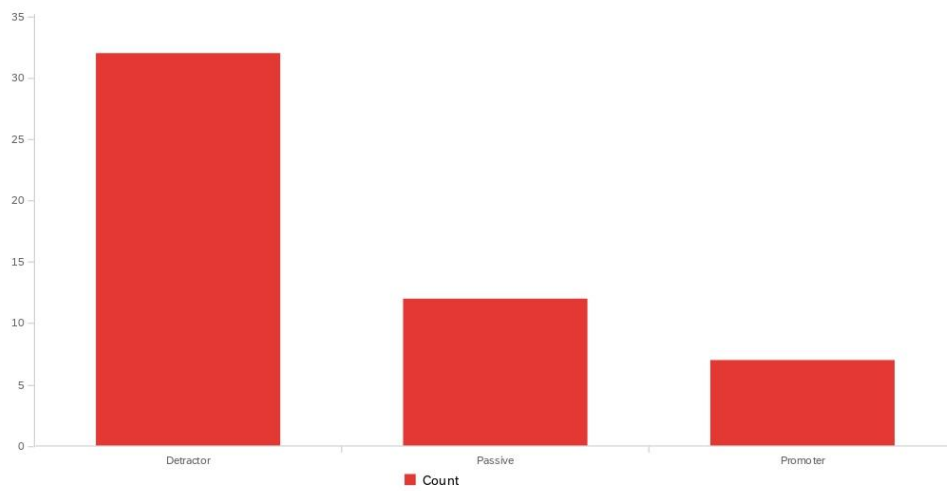
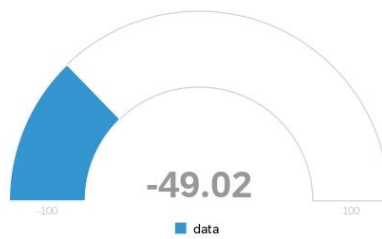
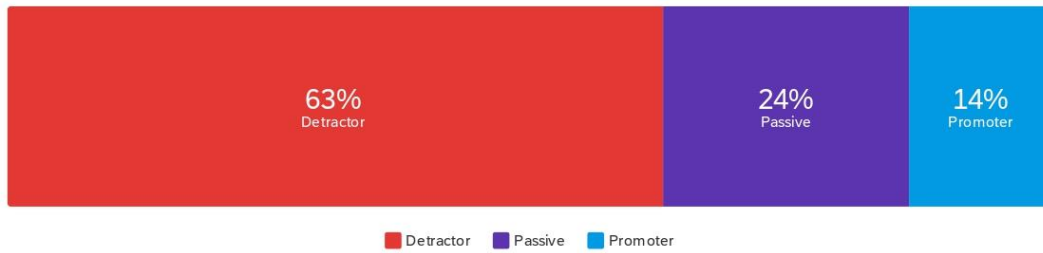
Gens très/trop accueillants, hôtels parfaits, gens un peu insistants

Soleil, jolis hôtels, bon accueil, pas cher

eee

Les hôtels soignés, confortables, le personnel pas toujours à l'écoute

Q5 - Si non, est-ce que vous considérez ce pays comme une destination potentielle pour un prochain voyage ?



## Q6 - Pourquoi ?

Pourquoi ?

Je n'aime pas voyager de base, et si je voyage, je préfère voyager dans un pays dont la culture je connais déjà un peu dessus.

Actuellement ça me paraît loin vu notre situation familiale -> brbe de 15 mois.

J'exclus tous les pays non démocratiques de mes destinations et pour le coup la Tunisie reste un des rares pays d'Afrique que j'aimerais visiter un jour, mais j'ai déjà beaucoup à en faire sur ma liste par rapport aux congés disponibles

Il ne fait pas partie du top de ma liste de pays que je souhaite visiter

Parce que je préfère aller à d'autres destinations avant

J'ai d'autres destinations à considérer avant la Tunisie .

ça ne m'attire pas plus que ça

Pas d'envie particulière

ça ne m'attire pas plus que ça

D'autres pays m'intéressent avant de considérer la Tunisie

Je préfère aller en Europe

Risque d'attentats

Je ne suis pas attiré par cette culture

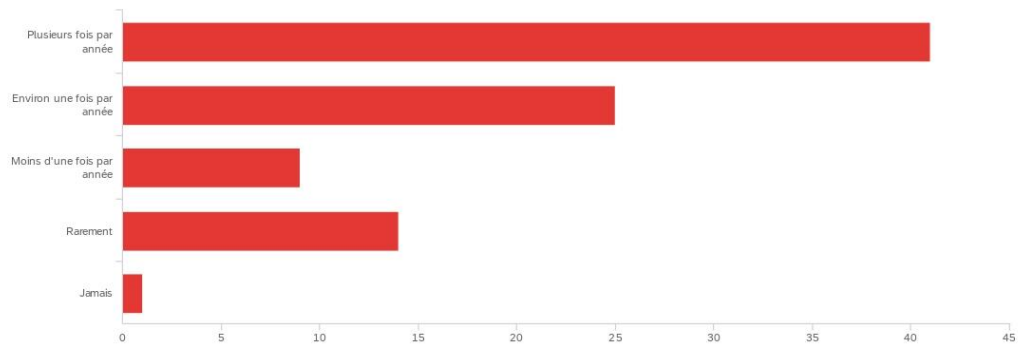
Par méconnaissance et je ne voyage jamais très loin

L'impression qu' hormis du désert et des stations balnéaires bétonnées, il n'y a rien à voir

Je n'y ai jamais pensé comme pays à visiter

J'ai d'autres pays sur ma liste à visiter avant

### Q7 - 3. A quelle fréquence voyagez-vous à l'étranger pour des vacances ?

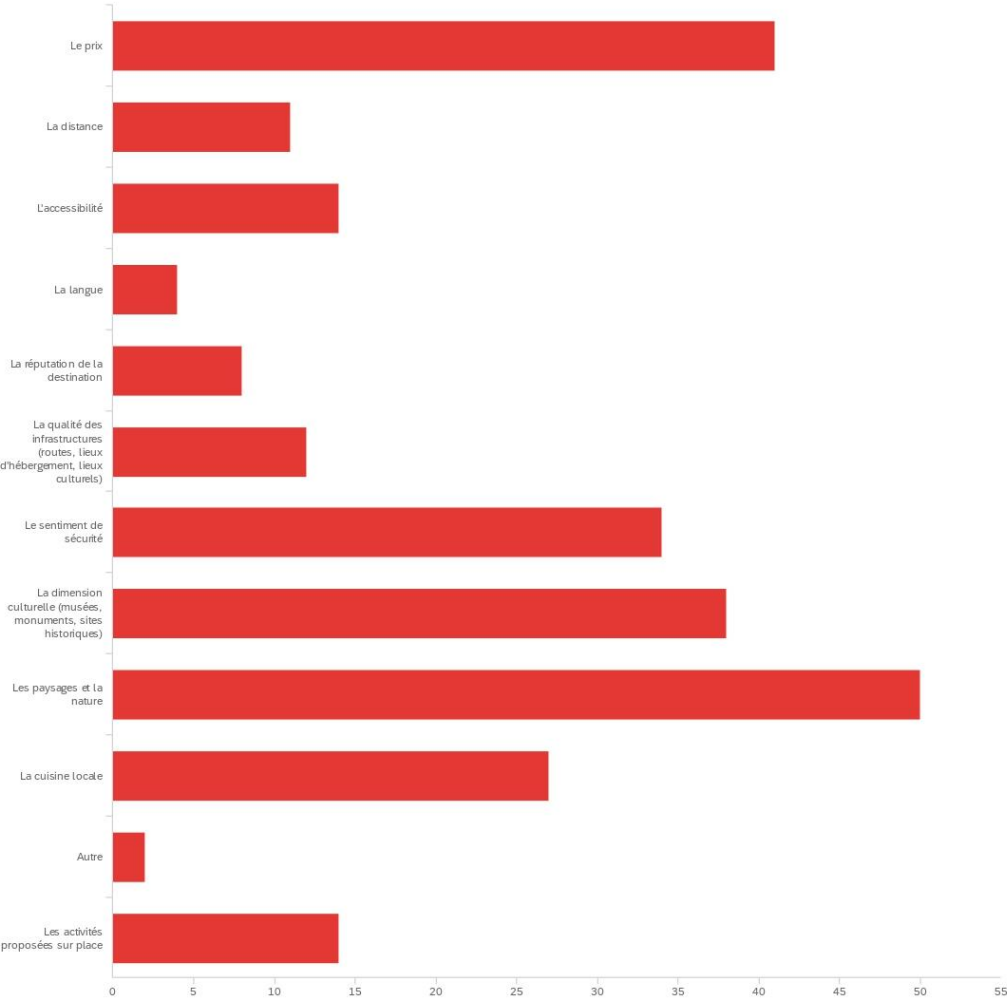


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	3. A quelle fréquence voyagez-vous à l'étranger pour des vacances ?	1.00	5.00	1.99	1.13	1.28	90

#	Field	Choice Count
1	Plusieurs fois par année	45.56% 41
2	Environ une fois par année	27.78% 25
3	Moins d'une fois par année	10.00% 9
4	Rarement	15.56% 14
5	Jamais	1.11% 1
		90

Showing rows 1 - 6 of 6

Q8 - 4. Quels sont les critères qui comptent le plus pour vous au moment de choisir une destination de vacances ? (Max. 3)



#	Field	Choice Count
9	Les paysages et la nature	19.61% 50
1	Le prix	16.08% 41
8	La dimension culturelle (musées, monuments, sites historiques)	14.90% 38

#	Field	Choice Count
7	Le sentiment de sécurité	13.33% 34
10	La cuisine locale	10.59% 27
3	L'accessibilité	5.49% 14
12	Les activités proposées sur place	5.49% 14
6	La qualité des infrastructures (routes, lieux d'hébergement, lieux culturels)	4.71% 12
2	La distance	4.31% 11
5	La réputation de la destination	3.14% 8
4	La langue	1.57% 4
11	Autre	0.78% 2

255

Showing rows 1 - 13 of 13

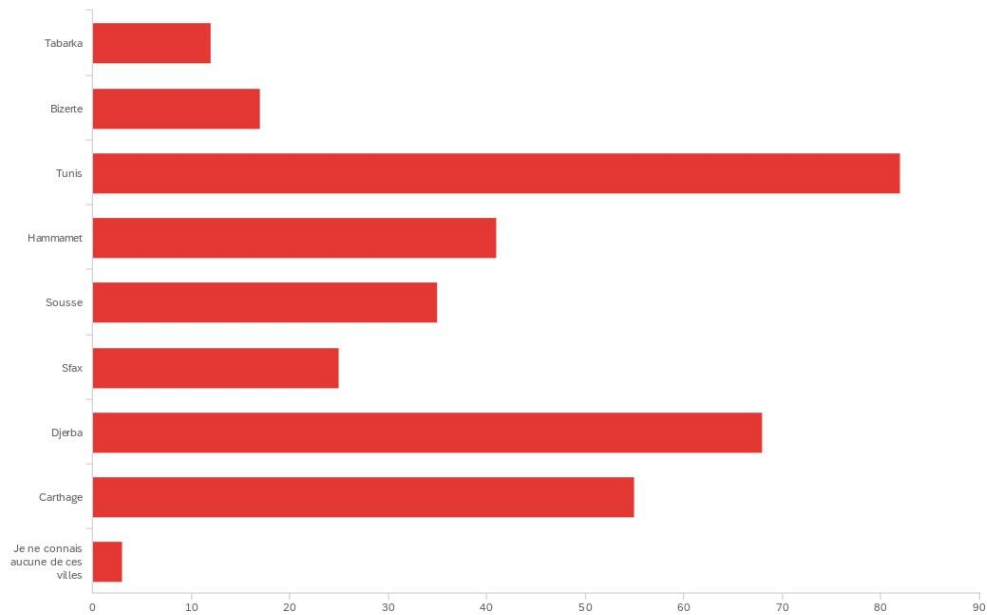
Q8\_11\_TEXT - Autre

Autre

Occasion d'y faire un marathon

Personne de contact (famille, ami etc)

Q9 - 5. Lesquelles de ces villes connaissez-vous de nom ?



#	Field	Choice	Count
3	Tunis	24.26%	82
7	Djerba	20.12%	68
8	Carthage	16.27%	55
4	Hammamet	12.13%	41
5	Sousse	10.36%	35
6	Sfax	7.40%	25
2	Bizerte	5.03%	17
1	Tabarka	3.55%	12
9	Je ne connais aucune de ces villes	0.89%	3
			338

Showing rows 1 - 10 of 10

## Q10 - 6. Quelle perception avez-vous de la Tunisie en tant que destination touristique ?

6. Quelle perception avez-vous de la Tunisie en tant que destination touris...

C'est difficile de d'avoir un perception d'un pays quand on connais rien dessus, mais je pense qu'il devrait avoir des endroits à visiter et des endroits à éviter.

eee

Plages, cuisine local et monuments

Pays accueillant et ensoleillé

Culture culinaire intéressante, très bon endroit pour "lézarder au soleil" avec des paysages intéressants, ambiance méditerranéene ( les gens sont chaleureux )

destination balnéaire

Accueillant.

Djerba est très touristique. C'est sympa

Rapport qualité/prix,avantageux et correct

la Tunisie est une destination balnéaire avec un bon rapport qualité/ prix

proche et pas cher

Bonne infrastructure et serviabilité souriante

Des hôtels all inclusive au bord de la mer

Préjugé peut-être mais pas très sécurisé pour les femmes de voyager seule ou entre elles si pas du pays.

très bonne

J'en ai une bonne image, pas de soucis particuliers par rapport à mes critères, peut-être le climat mais il faut juste que je trouve le meilleur mois pour visiter quand son tour viendra

J'aurais peur de me retrouver dans un de ces grands hôtels où je vivrais dans une boule touristique la totalité du voyage. Je préférerais y aller avec quelqu'un du coin qui me fasse vivre le pays un peu plus de l'intérieur.

Aucunes

-1- bonne capacité pour des vacances balnéaires et découverte de la nature -2- très beau potentiel culturel qui reste à parfaire / exploiter / sécuriser

il s'agit d'une destination à température chaude

bonne

6. Quelle perception avez-vous de la Tunisie en tant que destination touris...

Un joli pays. C'est l'une de destination idéale pour des vacances balnéaires.

Pour être honnête je ne connais pas vraiment la Tunisie, encore moins ses aspects touristiques

Very good tourism destination. Easily combined with a voyage in Egypt and Morocco.

Touristique, plage

Bon marché

Un pays chaud

Une destination qui a l'air intéressante du à mes amis originaire de Tunisie, peut être un peu dangereux mais ce n'est pas une raison qui m'empêcherai d'y aller

Pour affronter la calvitie, j'ai entendu que la Tunisie est une bonne destination

Plus positif, tous mes amis qui y sont allés ont apprécié

Endroit sympa pour des vacances pas trop cher

Pas cher, soleil

Très connu niveau touristique et bonne destination de voyage

Ensoleillement, moyen ment sécurisé pour une femme

Je perçois la Tunisie plus comme un lieu de détente à la plage, avec un peu de visite culturelle

Au début je me sentais en sécurité, mais plus maintenant, je pense pas y retourner

Pas mal de pub mais rien sortant de l'ordinaire

I think it is a great place to enjoy the see, the dishes and also to relax

Je n'avais pas vraiment pensé à la Tunisie auparavant

Accueillante

bon marché ouverture d'esprit

Sjsjdk

Un pays qui a bcp à offrir, mais qui, malheureusement, n'est pas très sûr ces temps-ci

La Tunisie est un pays de Plages et de Désert. La mer est parfaite, ni trop chaude ni trop froide. La nourriture locale est un régal.

Je ne sais pas

6. Quelle perception avez-vous de la Tunisie en tant que destination touris...

Très sympa

Un pays plein de chose a visiter, plein de destinations differents (plages, musees, site archeologiques), une exceptionel tradition culinaire et un pays qui offre un accueil impeccable.

Repos sur les plages et visites culturelles multiples.

Endroit très agréable et beau temps

Je n'ai pas d'avis car je ne suis pas suffisamment informé

Bonne

C'est un très beau pays, avec de multiples paysages naturels magnifiques à découvrir, les zones désertiques ou montagneuses m'attirent beaucoup, mais malheureusement ces régions ne sont pas trop conseillées pour des voyages touristiques

Bonne car pays nodéré

Plage, culture maghrébine

Destination agréable, accessible financière, découverte d'une culture et de traditions, évasion

Pas d'appréhension particulière. Je pense que cela pourrait être une très bonne destination pour des vacances !

Il y a quelques villes où il y a beaucoup de touriste comme Djerba mais le reste est tout de même beaucoup moins touristique.

Pays tres accueillant et chaleureux.

un grand atout pour l'industrie touristique

Plutot positive, je m'attends à un pays habitué à avoir des touristes et donc réceptive à l'idée d'en avoir.

Les pays d'Afrique du Nord ne sont pas mes destinations préférées

Bonne

Ville d'époque avec une météo agréable

Doit encore se développer

Attire pas mal de touristes

Plutôt bonne

Je pense que c'est un pays accueillant et qui semble intéressant à visiter.

Destination de vacances balnéaires

6. Quelle perception avez-vous de la Tunisie en tant que destination touris...

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Destination proche et facile d'accès pour changer complètement d'ambiance ( culturelle, alimentaire)

Perception positive, bonne cuisine, découvrir une autre culture, etc..

Soleil

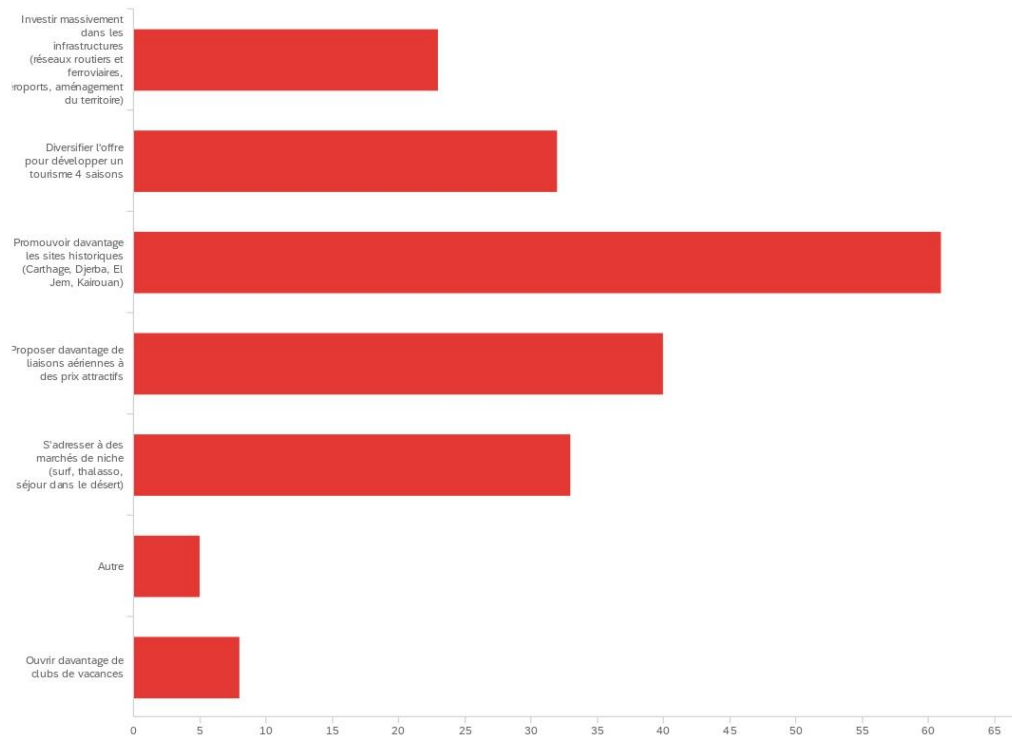
truc à touristes avec Djerba

Je pense aux clubs de vacances

Bonne

Tourisme classique: plage et hôtel.

Q11 - 7. A votre avis, quelles mesures devraient être prises pour renforcer l'attractivité de la Tunisie auprès des touristes suisses ? (Max. 3)



#	Field	Choice Count
1	Investir massivement dans les infrastructures (réseaux routiers et ferroviaires, aéroports, aménagement du territoire)	11.39% 23
2	Diversifier l'offre pour développer un tourisme 4 saisons	15.84% 32
3	Promouvoir davantage les sites historiques (Carthage, Djerba, El Jem, Kairouan)	30.20% 61
4	Proposer davantage de liaisons aériennes à des prix attractifs	19.80% 40
5	S'adresser à des marchés de niche (surf, thalasso, séjour dans le désert)	16.34% 33
6	Autre	2.48% 5
7	Ouvrir davantage de clubs de vacances	3.96% 8
		202

Showing rows 1 - 8 of 8

Q11\_6\_TEXT - Autre

Autre

Aucune idée

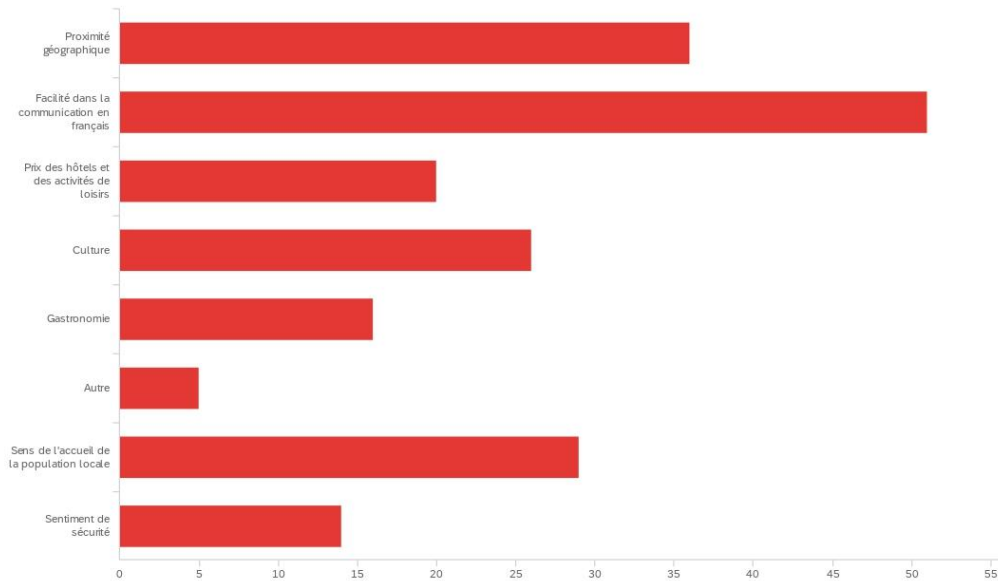
Je pense que la Tunisie est déjà connue comme destination de voyage par beaucoup de suisses.

Le train est a developé

La sécurité et la stabilité politique

Je sais pas

Q12 - 8. A votre avis, quels sont les avantages compétitifs de la Tunisie par rapport aux autres destinations populaires en Afrique du Nord (Maroc, Egypte) ? (Max. 3)



#	Field	Choice	Count
2	Facilité dans la communication en français	25.89%	51
1	Proximité géographique	18.27%	36
7	Sens de l'accueil de la population locale	14.72%	29
4	Culture	13.20%	26
3	Prix des hôtels et des activités de loisirs	10.15%	20
5	Gastronomie	8.12%	16
8	Sentiment de sécurité	7.11%	14
6	Autre	2.54%	5

197

Showing rows 1 - 9 of 9

Q12\_6\_TEXT - Autre

Autre

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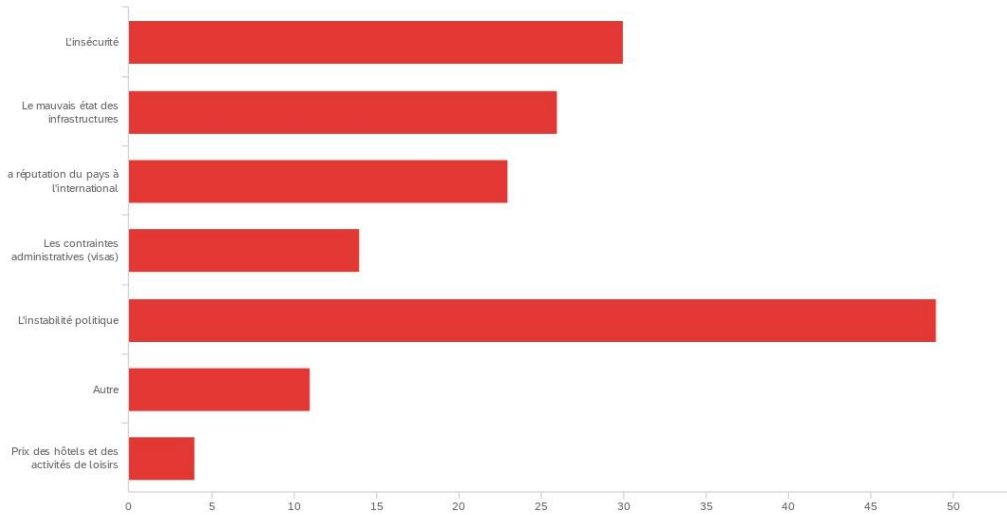
Jamais allé, difficile de dire

Je ne sais pas

Je sais pas

Je ne connais pas la Tunisie

Q13 - 9. A votre avis, quelles sont les faiblesses de la Tunisie par rapport aux autres destinations populaires en Afrique du Nord (Maroc, Egypte) ? (Max. 3)



#	Field	Choice	Count
5	L'instabilité politique	31.21%	49
1	L'insécurité	19.11%	30
2	Le mauvais état des infrastructures	16.56%	26
3	La réputation du pays à l'international	14.65%	23
4	Les contraintes administratives (visas)	8.92%	14
6	Autre	7.01%	11
7	Prix des hôtels et des activités de loisirs	2.55%	4
			157

Showing rows 1 - 8 of 8

Q13\_6\_TEXT - Autre

Autre

la visibilité culturelle

Autre

Jamais allé, difficile de dire

Je sais pas

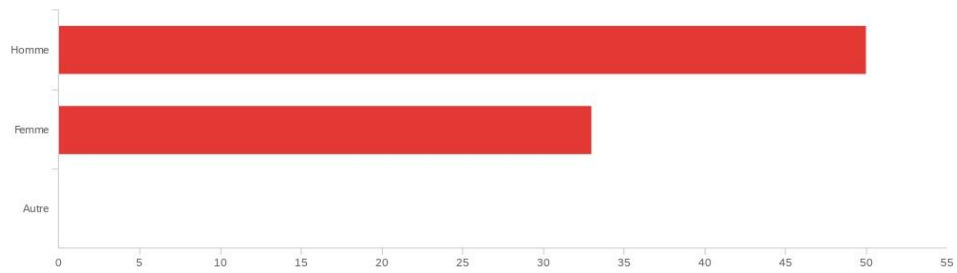
Je ne connais pas la Tunisie

Les monuments ou sites historiques à visiter sont moins connus

Aucune idée

Je ne connais pas assez le Maghreb pour juger

### Q14 - 10. Quel est votre genre?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	10. Quel est votre genre? - Selected Choice	1.00	2.00	1.40	0.49	0.24	83

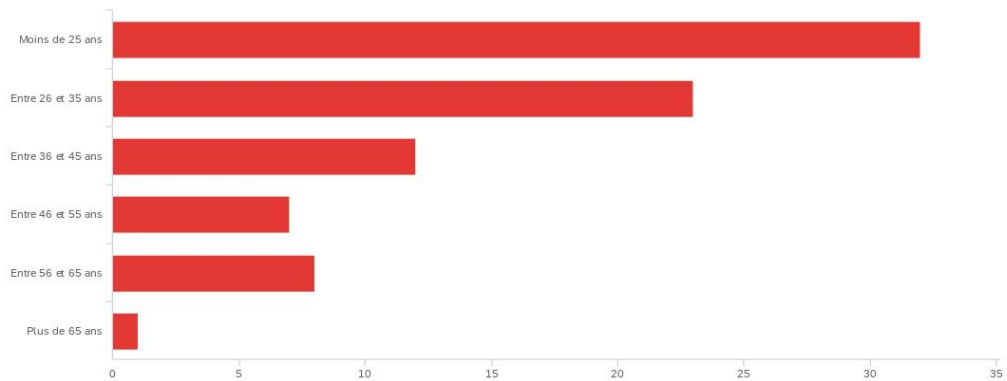
#	Field	Choice Count
1	Homme	60.24% 50
2	Femme	39.76% 33
3	Autre	0.00% 0
		83

Showing rows 1 - 4 of 4

Q14\_3\_TEXT - Autre

Autre

### Q15 - 11. Quel âge avez-vous ?



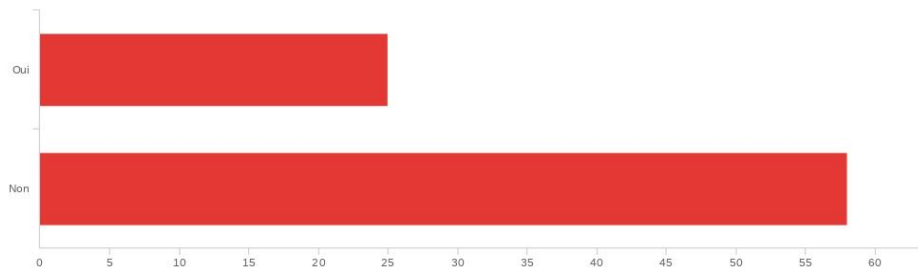
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	11. Quel âge avez-vous ?	1.00	6.00	2.27	1.36	1.86	83

#	Field	Choice Count
1	Moins de 25 ans	38.55% 32
2	Entre 26 et 35 ans	27.71% 23
3	Entre 36 et 45 ans	14.46% 12
4	Entre 46 et 55 ans	8.43% 7
5	Entre 56 et 65 ans	9.64% 8
6	Plus de 65 ans	1.20% 1

83

Showing rows 1 - 7 of 7

Q16 - 12. Avez-vous des enfants?



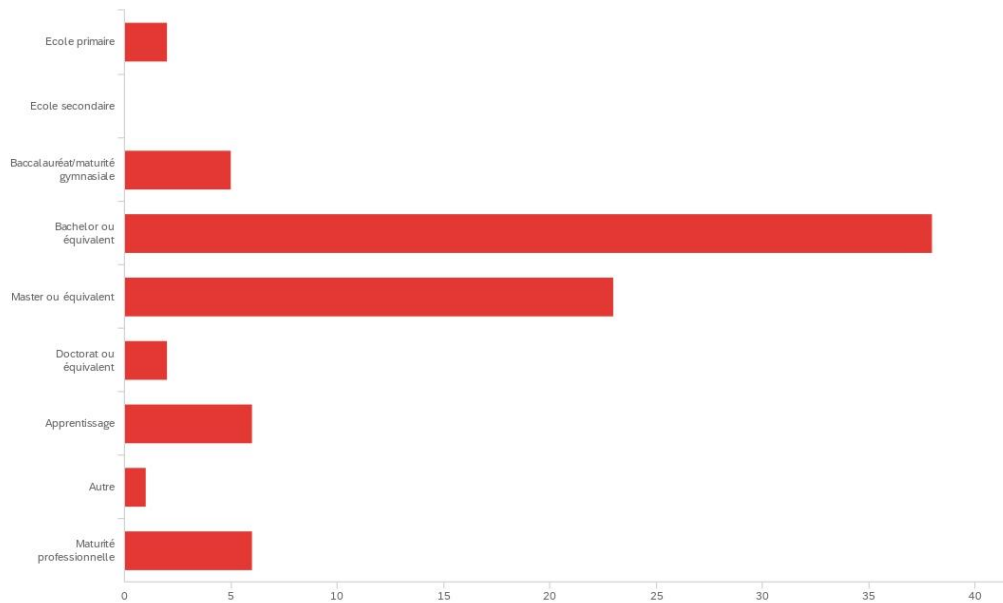
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	12. Avez-vous des enfants?	1.00	2.00	1.70	0.46	0.21	83

#	Field	Choice Count
1	Oui	30.12% 25
2	Non	69.88% 58

83

Showing rows 1 - 3 of 3

### Q17 - 13. Quel est votre plus haut niveau d'éducation ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	13. Quel est votre plus haut niveau d'éducation ? - Selected Choice	1.00	9.00	4.82	1.62	2.63	83

#	Field	Choice Count
1	Ecole primaire	2.41% 2
2	Ecole secondaire	0.00% 0
3	Baccalauréat/maturité gymnasiale	6.02% 5
4	Bachelor ou équivalent	45.78% 38
5	Master ou équivalent	27.71% 23
6	Doctorat ou équivalent	2.41% 2
7	Apprentissage	7.23% 6
8	Autre	1.20% 1

#	Field	Choice Count
9	Maturité professionnelle	7.23% 6
		83

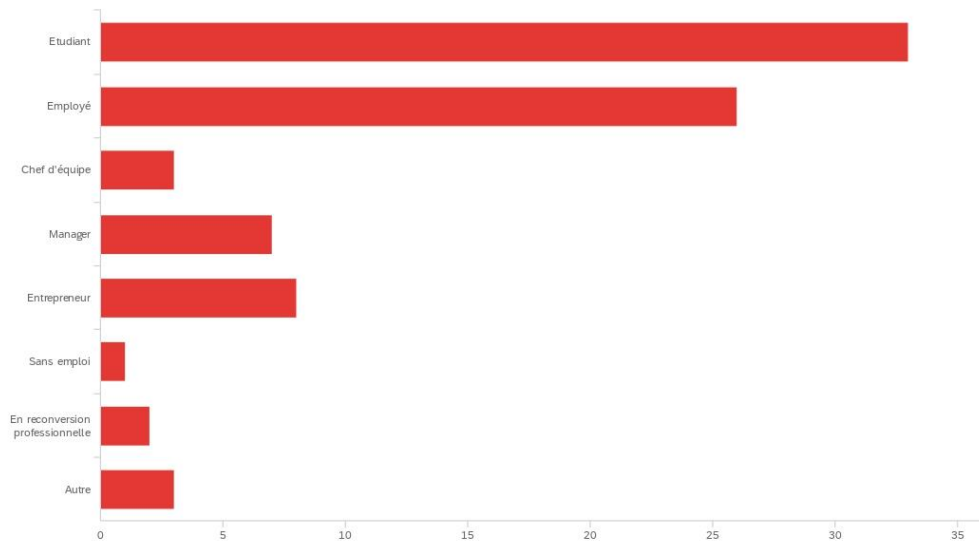
Showing rows 1 - 10 of 10

Q17\_8\_TEXT - Autre

Autre

Bts

### Q18 - 14. Quel est votre statut professionnel?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	14. Quel est votre statut professionnel? - Selected Choice	1.00	8.00	2.48	1.87	3.50	83

#	Field	Choice Count
1	Etudiant	39.76% 33
2	Employé	31.33% 26
3	Chef d'équipe	3.61% 3
4	Manager	8.43% 7
5	Entrepreneur	9.64% 8
6	Sans emploi	1.20% 1
7	En reconversion professionnelle	2.41% 2
8	Autre	3.61% 3

83

Showing rows 1 - 9 of 9

Q18\_8\_TEXT - Autre

Autre

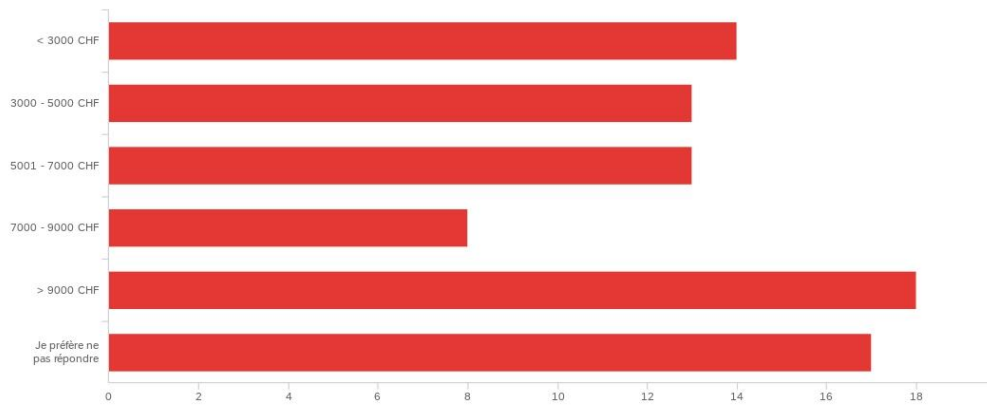
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Consultant Business Intelligence

retraité

Enseignante bénévole

Q19 - 15. Quel est le revenu mensuel moyen dans votre ménage ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	15. Quel est le revenu mensuel moyen dans votre ménage ?	1.00	6.00	3.65	1.79	3.22	83

#	Field	Choice Count
1	< 3000 CHF	16.87% 14
2	3000 - 5000 CHF	15.66% 13
3	5001 - 7000 CHF	15.66% 13
4	7000 - 9000 CHF	9.64% 8
5	> 9000 CHF	21.69% 18
6	Je préfère ne pas répondre	20.48% 17
		83

Showing rows 1 - 7 of 7

**End of Report**

## 8. Appendix 2: Interview with a manager from the ONTT

**Role:** Advertising director for the national tourism office in a major European country

This conversation was held on the 29<sup>th</sup> of April and lasted 19 minutes and 43 seconds. The audio file is available upon request. The phone conversation was done in French; therefore, the full transcript has been written in this language. Parts of the interview have been translated and directly inserted into the report.

### 1. En quoi consiste votre mission en tant que représentants de l'ONTT en Europe ?

Notre mission première est d'engendrer de la demande et de faire partir un maximum de Français en Tunisie. D'une manière générale, notre action repose sur deux axes principaux : tout d'abord une campagne publicitaire de nature institutionnelle, complétée par des actions conjointes avec nos partenaires voyagistes. Cet axe repose principalement sur la mise en avant de nos produits touristiques tout au long de l'année (offres balnéaires et culturelles, excursions dans le désert, tourisme de santé), tout cela au travers de campagnes de promotion dans les médias traditionnels. Les campagnes conjointes avec nos partenaires couvrent quant à elle la dimension commerciale de notre activité.

Le deuxième axe repose sur notre participation aux foires et autres salons touristiques partout en Europe. Il peut s'agir de grands salons dédiés à l'industrie touristique dans son ensemble, comme de plus petits événements qui ne couvrent qu'une sous-catégorie (salon du thermalisme par exemple). Bien entendu, les actions de relations publiques font aussi partie de notre mission. En temps normal, nous organisons environ un voyage par mois avec des journalistes et autres personnes travaillant dans le secteur des médias, mais ce rythme a été quelque peu perturbé par la pandémie.

En 2010, nous avons atteint pour la France 1,4 millions de clients, de qui représente notre plus haut historique. Le secteur du tourisme étant très sensible aux événements extérieurs, les dix dernières années ont été plus compliquées pour nous. Il est primordial qu'un touriste se sente en sécurité et prêt psychologiquement à visiter une destination.

### 2. Quels sont les points forts de la Tunisie pour réussir sur le marché européen ? Notamment par rapport aux autres pays d'Afrique du Nord ?

Je vous ai parlé tout à l'heure des produits que l'on met en avant, et clairement, le tourisme balnéaire représente le pilier principal de notre stratégie. Toutefois, cela ne veut pas dire que c'est notre seul et unique produit. La saison du tourisme balnéaire commence généralement en avril/mai et s'étend jusqu'en septembre/octobre.

Les autres produits que nous essayons de mettre en avant au travers de nos campagnes de promotion sont : le produit saharien, qui est très important, mais qui souffre depuis 2010 du manque de liaisons aériennes en direction de la région de Tozeur. Nous pouvons aussi parler de l'offre culturelle, très riche et diversifiée, du tourisme de santé, car nous représentons une destination très importante de thalassothérapie, aussi bien dans les hôtels que dans les centres spécialisés. Enfin, le tourisme de congrès prend de plus en plus d'importance car nous

disposons d'infrastructures de qualité. Tous ces produits secondaires sont complémentaires à l'offre balnéaire.

**3. Selon vous, est-ce que ces offres sont suffisamment connues, ou est-ce qu'un important travail de sensibilisation reste à effectuer ?**

Pour les tour-opérateurs, l'option balnéaire reste la plus simple à mettre en avant par le biais de produits d'appel et d'offres attractives, particulièrement à cette période de l'année (printemps). Néanmoins, il est évident que nous devons tout mettre en œuvre pour promouvoir ces produits complémentaires. A mes yeux, il faut impérativement relancer les liaisons aériennes en direction du sud-ouest, qui ont quasiment disparu.

Les campagnes publicitaires et commerciales sont bien évidemment centrales dans l'accomplissement de nos objectifs. Enfin, les voyages de presse jouent aussi un rôle dans ce travail de sensibilisation à notre offre touristique. Tous ces éléments comptent dans notre mission de relancer cette destination.

**4. Quels moyens avez-vous à disposition (humains, financiers) ? Recevez-vous des financements du ministère du tourisme ? Qu'en est-il des partenaires privés ?**

Nous sommes une société semi-étatique, tout est financé par le ministère, nous n'avons pas de partenaires externes. Nous disposons d'un budget de fonctionnement pour le bureau à gérer et nous avons 7-8 employés dans notre bureau de représentation.

En outre, nous disposons de moyens supplémentaires pour notre participation aux événements que j'ai cité tout à l'heure (foires, salons). Notre directeur est nommé par le siège en Tunisie et nous couvrons tout le marché français.

**5. Disposez-vous d'une certaine flexibilité dans vos orientations stratégiques pour cibler plus particulièrement le public européen ? Recevez-vous des consignes de la part du ministère à Tunis ?**

Les lignes directrices de la stratégie sont dictées par le siège. Néanmoins, chaque pays ayant ses spécificités, la campagne de publicité est élaborée par une agence externe. Une fois achevée, cette campagne doit être validée par le siège.

**6. Quelles sont les spécificités du marché européen ? Quelles sont les attentes du touriste européen moyen ?**

L'attente du touriste Européen est avant tout liée au tourisme balnéaire, qui représente notre fonds de commerce. Au-delà de ça, il souhaite placer son séjour sous le sceau de la découverte, d'où l'importance du produit culturelle. Aussi, le tourisme de santé, qui est particulièrement compétitif, et le développement durable font partie des points sur lesquelles le visiteur est sensible.

## **7. Pour vous, quels sont les atouts de la Tunisie sur ce marché ?**

La proximité géographique, la compétitivité au niveau du prix, les dimensions culturelles et linguistiques comptent aussi. Le touriste Français, bien que dépaysé, est dans son élément, il communique sans soucis avec la population. Cela représente un avantage pour nous, car il est particulièrement plaisant de pouvoir parler sa langue tout en étant à 2'000km de chez soi.

## **8. A vos yeux, est-ce que l'offre touristique existante est suffisante et répond aux besoins ? Quels sont les points d'amélioration possibles ? Quelles infrastructures sont à rénover en priorité pour renforcer l'attractivité de la Tunisie ?**

Ce que nous voulons mettre en évidence, c'est que notre infrastructure répond à la demande, il n'y a pas de soucis à ce niveau-là. La qualité de nos hôtels est réelle, le rapport qualité/prix en particulier est excellent.

La priorité aujourd'hui est de relancer l'industrie, en tenons compte du cœur de cible de notre positionnement qui reste l'offre balnéaire, tout en mettant en avant les produits complémentaires où il y a encore beaucoup de potentiel à exploiter hors-saison estivale.

En termes d'infrastructures, il est primordial de garantir une meilleure desserte aérienne dans l'ensemble du pays. La demande est là, mais l'offre aérienne est clairement insuffisante. La solution de l'Open Sky n'apportera pas une réponse à tous nos problèmes, mais représente une formidable opportunité de multiplier par 2 ou 3 la fréquentation de notre pays. La mise en application de cette idée est malheureusement remise à plus tard régulièrement, mais il va falloir y venir.

## 9. Appendix 3: Tunisia's map

