The new territories of tourism in Egypt: a local-global frontier?

Entre local et global: les nouveaux territoires du tourisme en Égypte

Leïla Vignal

Electronic version
URL: http://journals.openedition.org/cybergeo/23324
DOI: 10.4000/cybergeo.23324
ISSN: 1278-3366

Publisher
UMR 8504 Géographie-cités

Electronic reference

This text was automatically generated on 2 May 2019.
The new territories of tourism in Egypt: a local-global frontier?

Entre local et global: les nouveaux territoires du tourisme en Égypte

Leïla Vignal

AUTHOR'S NOTE

Article written while holding a Marie Curie Fellowship, funded by the European Commission, at the Middle East Centre, St Antony’s College, Oxford University.

Introduction

1 Political studies and theories of globalisation have often equated globalisation with a process where space and locality are eroded by economic transnational networks and are, to some extent, considered as no longer relevant as an analytical framework – this is the case in particular for the territories defined by national boundaries. On the other hand, many social scientists have emphasized the importance of place, scale, and nation in the process of globalisation, in particular through the analysis of cities in the global economy (SASSEN, 1991, 2006; VELTZ, 1996). Globalisation is here understood as a process which not only engages international scales of action and specific domains of activity (the economy for instance), but also engages the whole range of social interactions on all the different geographic scales (LEVY, 1999).

2 Furthermore, scholars have insisted on the importance of place and territories in the process of globalisation, as well as on their increasing relevance and role in globalisation (SHORT, 2001; SCOTT, 2008). Place and territories offer unique and specific combinations of strategic resources. They are also social and spatial configurations, whose relative position is redefined by globalisation. Space is far from being globalisation’s biggest loser: it is at the same time its product and its engine (LEVY, 1999, p. 338).
This essay, which makes use of the theoretical paradigm of global studies, takes the example of tourism in Egypt to argue that globalisation is also a process of territorial creation. Indeed, the Upper Valley of the Nile, the shrine of the archaeological sites, is not Egypt's first destination any longer: for an overwhelming majority of tourists, the transparent waters of the Red Sea – and, to a lesser extent, of the Mediterranean Sea – offer new temptations, which are advertised and packaged by companies working for the global market. This territorial shift has taken place over less than twenty years, since Egypt's first tourism destinations were mere deserted beaches at the end of the 1980s. But this territorial creation does not only take place on the local or national scale: it puts Egypt firmly on the global maps of tourism, as part of an emerging global frontier.

In the context of the massive growth in the number of tourists and of the activity of tourism from the 1990s onwards, in tune with a process of economic liberalization and opening, this article first demonstrates how the emergence of Egypt on the maps of global tourism has translated into the creation and development of new territories of tourism. It argues that this process leads to a complete inversion of the former maps of tourism in Egypt. Secondly, it analyses the system of actors that supports this territorial inversion, as it exemplifies the local-global nexus at the heart of global processes. This system articulates the tourist, the State, the national tourism industry, and the actors of global tourism – focusing on the hotel sector.

Twenty years of the Revolution of Tourism in Egypt: from the 1990s onwards

Egypt has long been visited by foreign travellers. The reputation of Egypt as one of the haut-lieux (landmarks) of world tourism stretches back to the last third of the nineteenth century, when the visit to its archaeological sites became, in the suitcases of Thomas Cook and in the wagons of British rule, part of the Grand Tour for an English gentleman - or gentlewoman.

But the magnitude of the changes that have taken place since the end of the twentieth century makes the former figures pale in comparison: Egypt has not only became, in the space of two decades, a world-tourism destination, but it has transformed from an archaeological-focused and selective touristic destination to one of supplier of leisure-orientated mass-tourism.

This transformation has to be put into a historical perspective. The growth of international tourism in the world goes back to the mid-nineteenth century: international tourism flows represented 25 millions entries of tourists in 1950, 285 millions in 1980. The trend has accelerated in the last decades: from 457 millions in 1990, they have nearly doubled to reach 919 million in 2008. This does not affect all the regions of the world similarly as tourism flows are highly polarised towards and within a few regions. However, new destinations have emerged, following higher demand coming from developed as well as emerging countries, globalisation of the tourism industry (hotels, tour operators), and cheaper access to air transport.

In this context, Egypt displays a remarkable picture (Figure 1). On the shores of the Mediterranean, and in spite of its reputation as a core destination for cultural tourism, until the 1990s only 2 to 3 million tourists at best would visit Egypt each year, or 0.4% of world tourism. Twenty years later, the picture has changed dramatically: the symbolic
threshold of 10 million visitors was crossed in 2007, and in 2008 the numbers amounted to 12.8 million. Not only has Egypt asserted its place as a global tourism destination (1.4% of the world share) but between 1990 and 2008, the number of visitors grew by 76%, which is substantially faster than the world average (+ 50%).

Figure 1: Steady growth in the number of visitors (millions per year, 1990-2008)
Source: Time Series, Central Bank of Egypt

The boom in the numbers of visitors goes hand in hand with the rapid expansion of the hotel industry (Figure 2). In the early 1990s, tourists were accommodated in a mere 50,000 rooms. After nearly two decades of intense building activity, Egypt could boast more than 1,031 hotels, totalling 171,288 rooms (2008). This trend is unlikely to slow down: in 2008, 521 projects were under construction (among which 41 floating hotels), for 139,611 rooms (among which 2,661 for floating hotels), nearly a doubling of the 2008 capacity.
The rapid development of Egypt’s hotel industry is first and foremost related to the opening of the sector to private investment, after decades of tight public control. The relative youth of the market suggests a certain immaturity, such as the over-representation of 4 and 5-star hotels by comparison with international averages. Between 1997 and 2008, the share of 4 and 5-star hotels expanded from 11% and 15% of the total number of hotels to 16% and 21%. But this imbalance in favour of upper segment hotels is also the result of the recent arrival in the country of many international hotels that cater mainly for the upper segment of the tourism market. From a few international flagships on the main tourist sites (Cairo, Luxor, and Aswan) until the 1990s, their numbers have dramatically risen to reach nearly 200 in 2008 (198), a 20% share of all Egypt’s or Egyptian hotels. However, 3-star hotels are catching up with the pace, especially in the Sinai and the Red Sea, reflecting the diversification of tourism markets in Egypt and the positioning of the country as an affordable beach holiday destination, especially for European customers.

With this formidable activity, gone are the days when a tourist’s standard itinerary would include Cairo, the archaeological sites of Upper Egypt, and perhaps Alexandria. Upper Egypt is still an important destination for international and national tourism and, in the general context of tourism expansion, it has experienced a constant growth of visitors. It has also received substantial investment from the private sector (construction of hotels). Public investment has mainly targeted the extension or upgrading of transport infrastructures (roads, bridges, upgrading and extension of Luxor airport in cooperation with the World Bank) and the beautification of the banks of the Nile, as well as the displacement of populations living on archaeological sites.

But Upper Egypt, in relative terms as well as in sound numbers of tourists, of hotel nights, of hotels, of infrastructures, of transportation and investments, is now clearly outnumbered by the newly-built coastal leisure resorts. The new orientation of Egypt towards the mass-tourism industry has fuelled the emergence of completely new tourism territories on its edge, along the Mediterranean Sea and the Red Sea, which has in turn introduced a new vocabulary of tourist landscapes.

**Building the Desert Shores: the ‘Inversion’ of Egypt’s Tourism Territories**

Until the 1990s, the sandy shores of Egypt were left bare to the winds, with the exception of the villas of the Egyptian bourgeoisie in the vicinity of Alexandria, the hotels left by the Israelis after their withdrawal from the Sinai in 1982, a few fishermen villages and scuba-diving spots on the coast of the Red Sea.

These new territories have since become Egypt’s first tourist destinations (Figure 3), with the tip of the peninsula of the Sinai and the Red Sea competing for the first place. Cairo maintains a third position as Egypt’s only air transportation hub. Upper Egypt receives 6% only of the tourists and counts for a mere 3% of the total of nights spent by tourists in the hotels of the country.
The opening of the seashores as a new destination for tourism, domestic or international, has led to the building *ex nihilo* of hotels, tourist villages and resorts on the Red Sea, the Sinai coast and, to a lesser extent, on the northern Mediterranean Coast (West of Alexandria). Figure 4 shows the construction boom of hotels in Egypt (+109% in ten years), mostly located along the three main seashores of the country. With growth rates above 300%, Sinai and the Red Sea Coast are leading the race.

<table>
<thead>
<tr>
<th>Location</th>
<th>1997</th>
<th>2008</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>units</td>
<td>share (%)</td>
<td>units</td>
</tr>
<tr>
<td>Red Sea</td>
<td>61</td>
<td>14</td>
<td>296</td>
</tr>
<tr>
<td>Sinai</td>
<td>69</td>
<td>16</td>
<td>278</td>
</tr>
<tr>
<td>Cairo</td>
<td>142</td>
<td>32</td>
<td>169</td>
</tr>
<tr>
<td>Upper Egypt</td>
<td>60</td>
<td>14</td>
<td>72</td>
</tr>
<tr>
<td>Alexandria</td>
<td>59</td>
<td>14</td>
<td>50</td>
</tr>
<tr>
<td>North Coast</td>
<td>24</td>
<td>5</td>
<td>34</td>
</tr>
<tr>
<td>Suez Canal</td>
<td>22</td>
<td>5</td>
<td>17</td>
</tr>
<tr>
<td>Total</td>
<td>437</td>
<td>100</td>
<td>916</td>
</tr>
<tr>
<td>Floating hotels</td>
<td>no data available</td>
<td>272 units</td>
<td></td>
</tr>
</tbody>
</table>
These impressive growth rates must be contrasted with the fact that, twenty years ago, the Egyptian shores were mere deserts. However, the deep shift in the spatial distribution of hotels translates in absolute terms as well. In 2008, two thirds of Egypt’s hotels are concentrated in the Sinai Peninsula and along the Red Sea Coast. With a comparatively modest growth rate (+14%), Cairo comes here too in third position. It is followed by the classic destinations of Upper Egypt, Aswan and Luxor that account for 8% of the total of hotels. This modest number has to be accrued with the float of 272 cruise boats, an important number although they only offer 17,308 rooms.

Although it displays the third highest growth rate of the decade, the Mediterranean coast appears in sixth position nationally in terms of numbers of hotels (34 hotels, 4% of the national total). Investment in hotels in the Mediterranean has indeed picked up later than in the all year-round sunny Red Sea region. However, the modest position of the North coast in Table 2 does not account for the massive investment that has taken place there since the 1990s. The difference stems from the fact that investments on the Mediterranean coast have mainly translated into a boom in second home real estate projects. In 2010, the coastline from Alexandria to the western city of Marsa Matrouh is almost continuously built. It forms a narrow ribbon of holiday accommodation - mainly gated compounds of villas or small flat buildings spread among gardens and swimming pools - where Egyptian nationals (and a small share of Arab tourists) spend the summer months. In this regard, the recent taking off in hotel investment signals an interest from some investors for developing international tourism on the North coast. However, the pick-up of international tourism on the Mediterranean coast is contingent upon the development of airport capacity. In this regard, the international Mövenpick group has suspended its decision to open a 5-star hotel in al Alamain until the new airport was in operation. The Alamein airport as been built under a B.O.T. scheme, and it operated its first charters flights from United Kingdom in April 2005.

The decades of the 1990s and the 2000s have led, in terms of the development of tourism, to an inversion of the territories of tourism in Egypt, to use the analysis offered by Marc Côte (COTE, 1988) (Figure 5).
Nowadays, the maritime edges of the national territory attract tourists, investments, and direct job opportunities, and this is where the most important share of tourism revenues is generated. This process of inversion is all the more remarkable in that these coastal regions were neither exploited nor valued twenty years ago and that they are still underpopulated: in 1996, the Red Sea governorate\(^\text{13}\) amounted to 157,315 inhabitants (60,085 in Hurghada, its main city); the population of South Sinai was 53,026 inhabitants (7,419 in Sharm el Sheikh)\(^\text{14}\). Even the employees of the hotels are not settled there; they commute from the Nile Valley for shifts of 8 to 12 weeks, with a week back home in the middle. On the maritime edges of the country, those new territories of tourism, which are hyper-specialized in one activity, can be analysed as functioning as mere offshore places.

### A New Vocabulary of Forms and Architecture

In these new territories, at the local level, a new vocabulary of forms and architecture was introduced\(^\text{15}\), creating three main types of spatial entities, of different structures, shapes, and sizes (figure 6).
The local scale

21 First type: Large resorts, like Hurghada and Sharm al Sheikh. They are proper agglomerations that combines governorate administrative functions, public services (hospitals) as well as a variety of intermediate services such as branches of banks, transport and tourism companies etc. They are also the main transport hubs of both region: Sharm and Hurghada airports come second and third both in numbers of flights and of passengers. Sharm el Sheikh, whose foundation as a resort dates back to the Israeli occupation of the Sinai, has developed international conferences facilities too, that are very much used by the Egyptian government. The urban fabric of both is made out of a juxtaposition of hotels of all types and size, gated resorts, leisure places, shopping malls and restaurants. Present on the books of all international travel agency, these two resorts attract most of the hotel investments, especially in high-end categories where international brands are most active. Sharm and Hurghada contain the highest number of hotels in Egypt (respectively 182 and 177 hotels in 2008\(^4\)). The share of 5 and 4-star hotels there is also well above the national average (Table 1): 24% and 32% for Sharm el Sheikh (56% of Sharm’s hotels), 15% and 29% for Hurghada (44% of Hurghada’s hotels).

22 On the North Coast, near al Alamain, the resort of Marina, can, in many respects, be associated with Sharm and Hurghada. It extends over 20 kms of coastline and associates many different types of tourism structures: private compounds (Marina 1, 2 etc.), a golf course, entertainment centres and shopping areas. Since the opening of the private development of Porto Marina in 2005, it even offers a large shopping mall (The Venice...
Canal mall, featuring canals and gondolieri), a marina for 500 boats and a luxury hotel. However, compared to the Red Sea and Sinai resorts, Marina is less diversified in its services and infrastructures, and it is strongly affected by seasonality: the place is bursting with people in the summer – mainly middle and upper-class Egyptians – but remains empty during the winter months.

23 **Second type**: Integrated tourist villages, generally gated, or semi-gated, offering on the same spot residential facilities and leisure activities, and generally, direct access to the sea. They combine several hotels, leisure activities and, for the largest, a real estate programme, all managed under the umbrella of one investor or group of investors. The biggest projects, ambitious to become private seaside cities of Egypt matching world-class standards, are *el Gouna* (north Hurghada); *Taba Heights* (North of the Gulf of Aqaba, near the Israeli border); and *Port-Ghalib* (in Marsa Alam, south Red Sea).

24 The most famous integrated village is the private city of *el Gouna*, developed by the Egyptian group Orascom Hotels & Development (Orascom Holding), is located 20 kms north of Hurghada. The development stretches along 10 kms of the coastline, and is built over 11 million sq meters. Under many aspects, it could be associated to the first type as it offers hotel facilities (14 hotels), a real estate programme, a private airport, a hospital, a school, a church and a mosque. According to Orascom, *el Gouna* hosts nowadays about 15 000 permanent residents living in villas and flats (2 500 residential units have been sold so far). High-end leisure offers include an 18-hole Championship Golf Course, two spas, with the (now usual) swimming pools as well as 100 restaurants, bars or eateries.

25 The second biggest integrated village is *Taba Heights*, which spreads over a surface of 4.5 million sqm and accommodates 4 5-star international hotels and one 4-star Egyptian brand hotel (Sofitel, Hyatt, Marriott, Intercontinental). *Taba Heights* displays the same kind of world-class amenities as the two previous projects: a 18-hole international golf course, a marina, swimming pools, spas etc. However, the real estate development that was part of the original project has been scrapped.

26 The third integrated village – and Egypt’s biggest - is *Port-Ghalib*, located in Marsa Alam, in the southern part of the Red Sea (260 m south of Hurghada). The first stages of the project go back to the beginning of the 2000s, with the first B.O.T. agreement awarded to the Kuwaiti Kharafi group to build and operate Marsa Alam international airport. *Port-Ghalib* is a private tourism resort project, stretching along 18 kms of coastline, with hotels, a real estate programme, a marina for 1000 boats, 22 restaurants, 65 coffee shops and shops, a casino, a proper city centre with all amenities and services, a 18-hole golf course, and an international conference centre.

27 Along the North Sea Coast, there were 120 active tourist villages in 2006: they are the main feature of this burgeoning new territory of tourism. Following the example of *Hacienda* or the three *Diplomatic Villages*, they are mainly private, exclusive compounds commanding separate access to the beach for the residents of the compound - and in some of them for day dwellers against a high entrance fee.

28 **Third type**: Stand-alone hotels (small scale projects), generally gated and with a swimming pool. They are mostly present in the Sinai and the Red Sea. Sometimes, several hotels of this type, when they are in the same neighbourhood (for instance lying side by side around a bay like Makadi Bay, south of Hurghada), pull together in order to rationalise the provision of certain services and infrastructures, or to gain more weight in
negotiations with the Tourism Development Authority, the governorates, or other public authorities.

Second and third types are subsets of the first one. They generally have several features in common: they are all gated, or separated from the outside by a more or less symbolic fence; they all have a swimming pool and, when they offer direct access to the beach, the buildings are developed along curvy lines facing the sea; their master plan mixes greenery and residential buildings; the more upmarket integrated tourist villages offer many leisure activities including, for some of them, a golf course or a spa. Their architecture, which is usually described on the promotion leaflets or the websites as a “hybrid” of Mediterranean and international styles, introduces a new kind of kitsch into Egypt (Le Grand, 1996).

These three types (resorts, integrated villages, stand alone hotels) are the result of private investment, whether it be from a single investor, like in most cases of stand-alone hotels and of some of the integrated villages, or from a group of investors, as in most of the cases of the integrated villages and resorts, although public provisions are part of the investment in large resorts (type 1). These private investments benefit from State incentives - mainly low purchase price of the bare ground, tax holidays, and the provision of basic infrastructures.

The “Old Places of Tourism”: The Upper Valley and Cairo

The new places of tourism very much differ from the structure of tourism in the old places of tourism. In the Upper Valley, there is an urban environment: tourism did not invent Luxor and Aswan. There, functions and activities of tourism are developed within a limited part of the city, and cohabit within it. These “city-resorts” (Figure 6) mix different economic and social urban functions. The tourism industry plays a central but not exclusive part in the social and spatial economy of these cities, unlike in the new beach resorts. At the regional scale, they are the central nodes of a network of tourism places that stretches from the north of Luxor (Abydos Temple) to the south of Aswan (Lake Nasser and Abu Simbel).

The situation of Cairo is markedly different. Spatially, international tourism is confined to some very limited areas of the agglomeration: the Pyramids area, the city centre with the Egyptian museum and the medieval Islamic city. Hotels are mainly to be found in the Pyramids/6th of October area, the central area of the agglomeration near the Nile River, and the Northeast areas of Heliopolis and Ma'dinat Nasr (business and proximity of the airport). Tourism is only one of the many economic activities of the capital, and it does not affect the overall urban organisation.

The Regional Scale: New Territories of Tourism

At the regional scale, one can observe two types of territories of tourism. First, districts that are territories composed of various places and sites connected in networks and polarised by a centre in which tourism plays an important but not exclusive role. These districts of tourism are characteristic of the ‘old’ territories of tourism in Egypt, in Upper Egypt (Luxor, Aswan) and to a certain extent in Cairo.

The second type is represented by the ‘new’ territories of tourism industry and translates into a new type of territorial organisation: nearly continuous conurbations of tourism
places (resorts, integrated villages, hotels), exemplified in Egypt along the coastline of the Red Sea, the Sinai Peninsula and the Mediterranean Coast. The conurbation of the Mediterranean Coast is nearly completed whereas in the Sinai and the Red Sea the gaps between built-in sections are numerous but narrowing, as more constructible sites are regularly included onto the map of the Tourism Development Authority (TDA), the governmental agency in charge with the designing of the zones open to tourism investment. In the three main seaside regions, the same relatively simple structure is on display: a narrow ribbon of constructions squeezed between the shore and a parallel main road that gives access to gated stand-alone hotels, tourist villages, or compounds of holiday homes.

However, the process of ex nihilo creation of a new type of Riviera is not to be read on a national scale only. In attracting a fraction of global tourism, Egypt's tourism industry has placed the Red Sea and the Sinai coasts on the global maps of international tourism. The new geography of tourism in Egypt can therefore be read as the product of a system of actors interacting on different scales, illustrating the close weaving of different threads in the local-global nexus.

A Four-Way Game: the Tourist, the State, the Egyptian Entrepreneur, and the Global Tourism Industry

The new geography of tourism in Egypt is based on a game with four actors: the tourist, the State, the national tourism industry, and the global industry of tourism.

The Tourist

Numerous studies of tourism have analysed, in anthropological, socio-political and in economic terms the unfolding of a 'civilization of leisure' and the expansion of mass-global tourism since the Second World War.

As for contemporary Egypt, the industry has clearly benefited from the increasing world demand for recreational, leisure and beach tourism. The numbers of foreign arrivals have jumped over the last twenty years. The bulk of the international demand originates from the EU (50%), the Middle East, and Russia (11%, nearly one million tourist entries in 2006) (Figure 7).

<table>
<thead>
<tr>
<th>Origin</th>
<th>Entries</th>
<th>in %</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU-27</td>
<td>4 552 883</td>
<td>50</td>
</tr>
<tr>
<td>Middle East</td>
<td>1 263 226</td>
<td>14</td>
</tr>
<tr>
<td>Russian Federation</td>
<td>998 149</td>
<td>11</td>
</tr>
<tr>
<td>Africa</td>
<td>745 063</td>
<td>8</td>
</tr>
<tr>
<td>East Asia &amp; Pacific</td>
<td>469 805</td>
<td>5</td>
</tr>
<tr>
<td>Others</td>
<td>711 115</td>
<td>8</td>
</tr>
</tbody>
</table>
The European and the Russian demand for beach holidays has been efficiently channelled by the global industry of tour and charter companies into one- or two-week packages that fit the four- to five-week paid holidays that are the rule in most industrial countries. Being close to Europe (4 to 5 hours by plane), with a good sun-rate all year-round, the Red Sea and the Sinai shores have come to be a relatively cheap and easily accessible new destination (Equipe MIT, 2002).

Indeed, the growth of Russian tourism in Egypt (+ 161% visitors between 2002 and 2006) reflects a cultural and socio-economic turn witnessed in many former socialist countries since the 2000s. In 2010, the Russian Federation has even become the first single-country of origin of tourists, a shift that is reflected in the spread of the Cyrillic alphabet in the hotels of the Red Sea and Sinai. However, the boom of Russian tourism is equally part of a major transformation of the pattern of Egypt’s tourism, with an important diversification of the origin of its tourists, as exemplified by the equally massive growth of the UK’s share of tourists in the 2000s (+ 189% between 2002 and 2006). Russians, Britons and Germans form the top league of the visitors entering Egypt each year (more than a million respectively) and aim mainly at its sunny shores. This diversification in the origin of tourists relies heavily on the building of a new offer of affordable and quickly accessible seaside leisure for European tourism, alongside the traditional archaeological tour.

However, the diversification of Egypt’s tourism offer reverberates on other clienteles as well, as is reflected in Figure 8, which is based on hotel occupancy figures in the five main touristic regions (Cairo, Alexandria, Red Sea, Sinai, Upper Egypt). The shift towards the new territories of tourism appears clearly – although differently - in each group of tourists (from Egypt, Arab countries, Americas, Europe, Asia and Pacific countries), a trend that has amplified over the 2000s.
Arab visitors from the Peninsula, with an important purchasing power, have been coming to Egypt in larger numbers, among which the Saudis come first (32% of visitors from the Middle East). It is indeed one of the side effects of the terrorist attacks of 09/11/2001 in New York, which have deterred a lot of Arab nationals from travelling to the USA or to Europe. But it is equally the result of the larger tourism offer available in the country. Indeed, Arabs, who used to spend the summer months in Cairo, possibly in Alexandria, include more and more beach holidays in their Egyptian tour. They buy or rent flats and villas in the Gulf of Suez or in the tourist compounds of the North Coast, but they also descend upon the new high-end hotels that have burgeoned during the last two decades in the main resorts of the Red Sea.

Domestic tourism in the new territories of tourism has also increased, although it is less visible in the sources. Egyptian tourists are indeed underrepresented in most data, which are based on international entries to the country. They are underrepresented in hotels too, as they are more likely to be accommodated by families or friends when they travel in the country, or to descend upon private residencies, either let or owned. The development of the North coast reflects the growth in holiday homes demand and it is fuelled mostly by Egyptian tourism. However, even when one is to look at hotel occupancy, national tourists came as the second tourist group according to one study published in 2005\textsuperscript{19}. Figure 3, based on this study, indicates that Egyptians too have embraced new habits of holidaying in hotels in new destinations: more than 60% of the total of nights spent by Egyptians in hotels in Egypt take place in the Red Sea and Sinai.

The State

The development of the industry of tourism and of the shores of Egypt is to be linked to decisive steps taken by the government from the mid-1980s through the 1990s.
First, the opening of the coastal areas to civil projects and private investors in the mid-1980s has been paramount. Previously, the coastal areas were shut as they were the domain (and the property) of the army. Sinai, especially, was considered as a strategic military ‘glacis’ for the protection of the Suez Canal and, further west, of the Nile Valley. After the signature of the Egyptian-Israeli Peace Agreement of Camp David (1979) and the withdrawal of the Israeli army (1983), the reconversion of Sinai into a tourist destination could start, based on the tourism infrastructures left by the Israelis.

Secondly, at the end of the 1980s, the government labelled the coastal governorates “priority zones for demographic development”. The objective was to diversify the economy of regions that were until then solely exploited for their mineral resources and their proximity to the off-shore oil-fields of the Gulf of Suez. The point was also to master the demographic growth and to redirect part of Egypt’s population towards those empty areas (SANMARTIN, SEGUIN, 1995). The project soon collapsed, not least because, with the policy of economic liberalisation launched at the beginning of the 1990s, it rapidly became clear that the development of tourism would bring in more revenues. As early as the mid-1980s, the turn in favour of tourism had been taken, but with neither strategic vision, implementation instruments nor macro-economic domestic environment to support this strategic turn. The Minister for Tourism of the time, Fuad Sultan, set the objective and the geographical frame of the future growth: a 40% increase in hotel capacity in ten years along the Mediterranean coast (from Alexandria to Marsa Matroh) and the coasts of Sinai and the Red Sea.

The third decisive step was the near-complete withdrawal of the State from direct involvement in the sector of tourism. Most of its assets were sold through privatization in the 1990s. Nowadays, it only retains full ownership of a few “jewels” in tourism landmark sites (famous hotels like the former Nile Hilton in Cairo, the Winter Palace in Luxor and the Old Cataract in Aswan) through its holding EGOTH (Egyptian General Organisation for Tourism and Hotels). It is also present, as a majority or minority shareholder in joint-ventures, in a small number of tourism projects, mainly hotels that are part of its legacy (the Swiss Inn Hotel in Luxor for instance). Public ownership of (a few) tourism projects is also held through public agencies, public banks, ministries or governorates: The Mercure Luxor Hotel in Luxor is the property of Misr Travel, the national travel company; the Grand Seas resort Hostmark Hotel in Hurghada, operated by Hostmark Hotels & Resorts, is the property of the Ministry of Interior; the Beach Albatros Sharm hotel, managed by the Pick Albatros Management Group, is the property of the South Sinai Governorate.

However, the State shifted to the role of planner, in designing priority areas and delivering building permits through the TDA, the public agency set up in 1991. It also undertook to develop transportation infrastructures, especially improving access to the new seashore sites: construction of roads and of airports, the latter being financed through international aid or loans, private investments (Marsa Alam airport, Red Sea coast, south Hurghada), or B.O.T. agreements (Bûrg al-Arab airport, Mediterranean coast). Airlines rules have been relaxed, allowing charter services to operate more freely and directly to the coastal areas (Open Sky policy) – although not to Cairo.

Finally, tourism is one of Egypt’s economic sectors that has clearly benefited from the different reforms of economic liberalisation since the 1990s. One of the most important ones, as far as private investment is concerned, is Law 8/1997 (Investment Guarantees and Incentives law adopted in 1997), which unified and upgraded the incentives to private investment, be it national or international (Gray, 1998; Hazbun, 2004; Steiner, 2006).
was followed in 2005 by Law 8/2005, aiming at upgrading it in substituting one of its core dispositions (10 years of tax holidays) with a slashed-tax rate of 20%.

As a result, over the last two decades, tourism has become a key sector of Egypt’s “new” economy. At the macro economic level, according to official figures, the direct economic impact of the tourism industry jumped from $ 315 million in 1985 to nearly $14 billion in 2010 and 13% of the GDP ($ 26.7 bn if one is to take into account the indirect impacts)\(^\text{20}\), which amounts to the first foreign currency source of the country\(^\text{21}\).

**The Egyptian Investor**

The Egyptian private sector started to invest in the tourism industry as soon as the first signs of a political and economic favourable shift were perceivable, and it has been its main player ever since. Official figures\(^\text{22}\) indicate that a total of 3383 private tourism establishments were set up from 1970 to 2007, accounting for $ 17.8 billion in capital. This represents the second largest domain of investment in the service sector over the period. 80% of this investment is under nominal Egyptian ownership. However, foreign capital is often present in those projects through joint-venture arrangements.

Two main types of establishments can be distinguished: first, the companies constructing or owning the hotels/villages; second, the companies managing them – one company possibly doing both. However, in Egypt, the main share of private investment has gone to the construction of hotels and tourist villages; hotel management activities come only second\(^\text{23}\).

Egyptian investors from all different walks of business can be found. Most of the tourism projects are small to medium scale projects, ranging from stand-alone hotels to groups owning a portfolio of different assets (hotels and/or cruises) located in different areas, often run by the same management and under the same brand. Stand-alone hotels are usually owned and managed by the same group, mainly tour operators that wish to provide for their clientele, groups of small investors pulling together, or family groups with one or few assets. It is for instance the case of the Red Sea Oasis group that owns the Fort Arabesque Hotel, located in Makady Bay (south of Hurghada) whose clientele is mainly generated by agreements with tourism agencies in Italy, Germany and the U.K. The group owns as well two floating hotels cruising on the Nile River (Presidential Cruise group)\(^\text{24}\).

After the flurry of projects of the 1990s, medium-size groups seem to emerge as a central feature of Egypt’s domestic hospitality industry. These groups tend to specialize in one activity. It is for instance the case of the Sunrise Resorts & Cruise group that operates a total of 9 hotels located in the Sharm el-Sheikh area (5) and the Hurghada area (4) (one being located in Makady Bay alongside Fort Arabesque) and 4 floating hotels based in Luxor under the Sunrise Resort brand. However, none of these hotels and cruise boats belongs to the Sunrise group, but each to a different owner. On the other hand, companies have specialised in the ownership of hotels.

However, major Egyptian groups, holdings with vast and diversified portfolios of activities, dominate the tourism industry sector though four main types of operations. Firstly, they launch single projects, as exemplified by el-Gouna, Orascom Hotels & Development (OHD) flagship project. OHD is one of the groups of the family-owned Orascom Holding (Sawiris family), believed to be Egypt’s most powerful group and whose operations extend to many strategic activities, from tourism management and ownership
to real estate, construction, telecommunications and IT. Secondly, big players sometimes pull together under the umbrella of large developments such as Taba Heights, near the Israeli border, in the Gulf of Aqaba. When it was launched in 1990, Taba Heights was a project aiming at the development of this borderland region and entailed an important participation of the State through public banks and public insurance companies. The financing of the project then evolved: the public participation is now small and the project is headed by a consortium of private investors in which a number of Egypt’s big players are present, like the main investor, OHD, which holds a 44% share of Taba Heights.

Thirdly, big Egyptian real estate groups are mainly active as owners. Finally, they can take shares in other groups’ projects. The example of OHD is relevant in all those activities: in addition to el Gouna, Tala Bay Aqaba in Jordan, and Taba Heights, the group’s hotel portfolio includes 31 hotels, managed under different brands (many of them international, such as Hyatt Regency, Mövenpick, Sheraton, Marriott, Club Méditerranée, Sofitel, Intercontinental) and offers Egypt’s largest pool of rooms (6 559). In addition, OHD directly operates some of el Gouna’s hotels, and since 2007, it has been operating there the international brand Steigenberger, through a licence agreement.

The Global Industry

56 Alongside Egyptian investors, the global tourism industry has also stepped into Egypt’s booming market, and it helps to shape some of its current features.

57 Between 1970 and 2007, Foreign Direct Investment (FDI) amounted to a rough 20% of the overall investments in tourism. However, it is mostly since the end of the 1990s that FDI in tourism have been on the rise. The largest share of FDI is to be found in the construction and infrastructure sectors. This foreign capital, mainly invested through joint-venture schemes with Egyptian partners, is paramount to the success of many medium-range projects. However, the largest share of FDIs in the 2000s has been channelled into large-scale projects financed, planned and operated by some of the Gulf’s most powerful residential and commercial real estate groups – one of many activities for some of them. These investments reflect the geographic diversification strategy chosen by many Gulf groups in the 2000s in order to develop their business, secure a dominant position in the emerging (and underdeveloped) real estate, tourism and commercial markets mainly in the Middle East and North Africa, and to reinvest a share of the booming oil revenues of the time.

58 In Egypt, the two main Arab investors are the Kuwaiti group Kharafi and the UAE group Emaar. The Gulf Kharafi develops Egypt’s largest private resort (17 million sqm) Port-Ghalib in Marsa Alam. In the mid-2000s, the total investment planned amounted $ 1.2 bn, which is the largest private investment in a single commercial project ever in Egypt. Emaar is a powerful Dubai-developer group that is expanding its activity throughout the Middle East and North Africa. It has been present in Egypt since the 2000s, developing major private cities on the edges of Cairo. Since 2007, Emaar has taken full property of Emaar Misr, the joint venture company it had first set up with Egyptian partners. Emaar Misr’s next project, Marassi, moves the focus of the company from urban dwellings to tourism: Marassi is advertised as a fully integrated private resort of 6.25 millions sqm on the shores of the North Mediterranean coast.

59 The internationalisation of Egypt’s tourism landscape is also made very visible through the growing presence of the international brands of hotels – more visible although
capital-intensive. From the few international hotels clustered in Cairo and Upper Egypt in 1990, the numbers jumped to 68 in the first half of the 2000s and to 169 in 2008 (Figure 9). In 2008, they totalled 42 different brands (although some brands belong to the same group, like Le Méridien and Sheraton to the Starwood Group), to be compared to a mere 11 less than ten years before.

<table>
<thead>
<tr>
<th>The big players</th>
<th>Four hotels</th>
<th>Two hotels</th>
<th>One hotel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accor (Sofitel, Novotel): 19</td>
<td>Le Méridien (Starwood Group)</td>
<td>Baron Hotels &amp; Resorts</td>
<td>Savoy</td>
</tr>
<tr>
<td>Hilton: 18</td>
<td>Four Seasons</td>
<td>Prima Life (Jaz Group)</td>
<td>Holiday Inn</td>
</tr>
<tr>
<td>Iberotel (Jaz group): 14</td>
<td>Martini Hotel - Reisendienst GMBH</td>
<td>Club Méditerranée</td>
<td>Cascades Hotel</td>
</tr>
<tr>
<td>Sol Y Mar (Jaz Group): 11</td>
<td>Steigenberger (Jaz Group)</td>
<td>Oberoi</td>
<td>Robinson Club</td>
</tr>
<tr>
<td>Mövenpick: 10</td>
<td>Helnan</td>
<td>Ritz Carlton</td>
<td>Park Inn</td>
</tr>
<tr>
<td>Intercontinental: 9</td>
<td>Rotana</td>
<td>Prima sol</td>
<td>Golden Tulip</td>
</tr>
<tr>
<td>Marriott: 7</td>
<td>Radisson</td>
<td>Hyatt International</td>
<td>Domina</td>
</tr>
<tr>
<td>Sheraton (Starwood Group): 7</td>
<td>Swiss Inn</td>
<td>Amaraanse JJW</td>
<td>Crowne Plaza Resorts</td>
</tr>
<tr>
<td>Sonesta International: 7</td>
<td>Sol Melia</td>
<td>Fairmont</td>
<td>Emaar Hospitality</td>
</tr>
<tr>
<td>Jaz Resorts (Jaz Group): 5</td>
<td>Three hotels</td>
<td>Ramada</td>
<td></td>
</tr>
<tr>
<td>(107 hotels, 63%)</td>
<td>Safir hotels</td>
<td>Conrad (Hilton Group)</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>169</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 9: The main international hotels brands in Egypt (2008)**

*Source: Author’s own calculations based on The Egyptian Hotel Guide 2008/2009.*

60 The 35 new brands are to be separated into two groups: the brands that operate a relatively small number of hotels (from 1 to 4) and the “big players”, among which the Jaz Group (36 hotels divided between four brands: Steigenberger, Jaz Resorts, Sol Y Mar, Prima Life), the Accor group (19 hotels divided among two brands, Novotel and Sofitel), or Hilton (18 hotels).

61 All of the ‘historical’ brands (present since at least the 1980s) still operate hotels. They remain implemented in Cairo and Upper Egypt, where some hotels have acquired an urban landmark image, like the Nile Hilton on Tahrir Square, next to the Egyptian Museum. But most of the recent expansion of these historical brands has taken place in the new territories of tourism: in the Red Sea and in South Sinai. It is in these two new territories of tourism as well that most of the global brands of the second half of the 2000s have opened units. Many of them completely neglect the Nile Valley in their implementation strategy.

62 This shift towards the Red Sea and the Sinai has fuelled the hotel boom illustrated in Figure 4, and is clearly demonstrated in Figure 10:
### Share by destination (in %)

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>South Sinai</td>
<td>35</td>
</tr>
<tr>
<td>Red Sea</td>
<td>27</td>
</tr>
<tr>
<td>Cairo</td>
<td>20</td>
</tr>
<tr>
<td>Upper Egypt</td>
<td>7</td>
</tr>
<tr>
<td>Alexandria</td>
<td>5</td>
</tr>
<tr>
<td>Central Valley</td>
<td>2</td>
</tr>
<tr>
<td>North Coast</td>
<td>2</td>
</tr>
<tr>
<td>Suez Canal</td>
<td>2</td>
</tr>
<tr>
<td>North Sinai (al-Arish)</td>
<td>1</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

**Figure 10: Geographic repartition of the main international hotels in Egypt (2008)**

*Source: Author’s own calculations based on The Egyptian Hotel Guide 2008.*

Two types of strategies are here at play. First, the strategy of global brands, part of powerful groups with global outreach like Accor, Hilton, Sheraton, Intercontinental, that aim at securing a world-wide market made of a mixed clientele of business and leisure world-wide. Theses brands are most exclusively luxury brands (5 and 4-Stars). In Egypt, their hotels are both on the tourism map of “old” and “new” territories and on the economic map (Cairo mainly, then Alexandria, then less serviced areas).

The second strategy is the one of hotel brands that specialise in seaside-oriented leisure tourism, and therefore focus generally on markets that are close geographically (in Egypt’s case, first Europe, then the Middle East) and economically diverse. In this sense, those brands can be labelled as more regional than global. This is particularly well-illustrated by the four brands operated by the Jaz Group that has recently entered Egypt’s tourism market: 53% of its 36 hotels are located in the Red Sea and 31% in the South Sinai, clearly aiming at servicing Europe’s demand for seaside holidays and catering for different segments of clienteles (from 3-star to 5-star hotels). Interestingly, aside from Cairo (one hotel) and Upper Egypt (two hotels), the Jaz brands are pioneers in the still underdeveloped hotel market of the North Coast (they have opened a Jaz Resort Hotel in Marsa Matrouh) and they are the first to have set an hotel in two of the western desert oases which until now have been the preserve of backpack-type tourists. This may well become one of the next frontiers for the global thirst for adventure or eco-tourism in the twenty-first century.
Whatever the business strategy, Egypt offers two main attractions for international/global brands: first, the country is an excellent destination for the growing demand for affordable and easily accessible recreational seaside/sunny tourism, especially from European clienteles. Secondly, for global brands especially, being present in Egypt adds an important asset to their strategy of global presence: the way to secure their activity is indeed to have an ubiquitous implementation policy, so that they can cater for their clients wherever they are in the world. In that sense, for such world players as international hotel groups, having a foothold in all the important tourist destinations worldwide is part of a long-term strategy to secure a market share of the global market as a whole.

In order to develop these worldwide networks, most of the international brands (Hilton, Sheraton etc.) are run through management contracts, when the ownership of the building remains in other (generally domestic) hands. The hotel group can therefore focus on the delivery of a service rather than on the ownership of a portfolio of properties. This operating mode holds for Egypt to.

However, the company that manages an international brand in a country is not necessarily its mother company. Indeed, nowadays an important number of brands are operated under franchise agreements: the hotels of the brand are run by another management company in exchange for an annual fee paid to the mother company. These ‘second-level’ companies hold the licence of exploitation of the brand for one or several countries. In the Middle East, powerful Gulf groups generally hold regional licences (covering several countries). It is for instance the case with the Four Seasons Hotels regional licence, which is the property of Kingdom Hotels Investments (KHI), a Saudi group that belongs to Prince Talal Ibn Talal; thus KHI operates the four hotels of the Four Seasons brand in Egypt.

Finally, globalisation of the business strategies can lead to even more complex organisations when it comes to the diffusion of international brands. One of Egypt’s most powerful leisure groups of the beginning of the 2010s, Travco, a former tour operator and travel agency company that has diversified its portfolio since the liberalization of the tourism sector, hold the licence of the 36 Jaz Group hotels. Moreover, it acquired in 2009 the full ownership of the Germany-based Steingenberger Group (one of the 4 brands of the Jaz Group), a move that allows Travco to expand its activity not only in Egypt but also on the European market as well.

Conclusion: The Global-Local Nexus and the Construction of Maps

The example of Egypt’s new geography of tourism illustrates how territorial creation may be triggered by globalisation. On the one hand, Egypt offers a good case study to remind us that globalisation is always very much embedded in a given political economy. On the other hand, Egypt’s emergence as a global destination is part of a process that leads to a deeper level of interactions and interdependence at the world level. In this sense, Egypt is now part of the globalisation frontier.

Indeed, Egypt’s new territories of tourism, which are physically detached from “main” Egypt (the Nile Valley) and which sell a glamorous image in conformity with transnational archetypes (architecture, leisure, consumption and lifestyle), could be seen
as “extra-territorial” – a successful shop-window for the world. But how do they relate to Egypt’s economic and territorial development?

One question lies in the long-term sustainability of the exploitation of tourism in the coastal regions. First, those territories are, under many respects, “off-shore”: their growth relies on “outside” players (the tourist, the investor, the global industry, the State) that can be threatened by unfavourable international, regional or national conjuncture. Their success does not even translate into a diversified and long term development: they are highly specialized territories dependent on ‘core’ Egypt for their work force, goods and basic resources (water, electricity, food etc.). Second, the development of the seaside is correlated to a rapid degradation of the environment. The risk of over-building is present and the ongoing destruction of the fragile marine ecosystem of the Red Sea could lead in the long run to the disaffection of the tourists.

A second question relates to Egypt’s political economy itself. The ever-growing revenues of tourism since the 1990s have been partly channelled into a system that has renewed the ways and means of relationships of patronage, rents and privileges, between the State and the new private sector. Under the cover of free-market policies, the interpenetration of the interests of the political and economic spheres has even been described as “crony capitalism” (HENRY, SPRINGBORG, 2001, 134-167). The new territories of tourism can be seen as the spatial transcription of this situation. First, they are the jewels in the crown that remain under close supervision from the State, through its regulatory and planning role. Second, the main shares of the benefits they generate go back to the economic and political central nodes of Egypt. One can therefore question the efficiency of the current development of tourism as a genuine instrument for encompassing economic development. Indeed, the trickling down of the wealth generated by tourism through the expansion of a new labour force, and its effect on related industries (industry of construction or of furniture etc.), is still limited. This is in part due to the de facto control of the State, which decides who is allowed to invest in the new Eldorado-s of tourism, thanks to its planning role. It can also be related to the fact that the new tourism economy is dominated by a handful of powerful private actors. In that sense, the new territories of tourism sustains what Christian Steiner (2006) describes as a “semi-rentier” State.

If one is to develop further these two sets of questions, the emergence and the rapid growth of the new territories of tourism can be analysed as an ongoing privatisation of the Egyptian seaside. Borrowing Saskia Sassen’s analysis of territoriality (SASSEN, 2006), Egypt’s new territories of tourism may be said to be part of a multi-level logic that ‘de-frames’ Egypt’s seaside from its national context and ‘re-frames’ it into other contexts, in this case into the maps of global ‘consumables’. This process benefits three main actors: first, the global tourist, in whose name the commodification process of the seaside is led; second, the global industry, which needs to expend its maps in order to sustain its activity worldwide; third, the new tycoons, the big private groups of the likes of the Orascom Holding that are the clear winners of Egypt’s recent economic liberalization process. The juxtaposition of different scales of action, logics and actors, amounts to a territorial system of exclusive places servicing the construction of new local and global tourism maps.
BIBLIOGRAPHY

Sources


CAPMAS, 1996, *Census of the population*, Cairo: CAPMAS.


UNWTO, “World Tourism Barometer”, April 2010 (www.unwto.org)

**NOTES**

1. On these aspects, see Hazbun (2004).
2. Source: Dehorne, Saffache, Tattar, 2008, p. 3.
4. The data used by the Ministry of Tourism is based on the computation of the Department of Passports, Emigration and Nationality, part of the Ministry of Interior Affairs, Egypt. These figures relate to all foreign arrivals into the country, regardless of whether people enter the country on tourism grounds or for other purposes (work, refugees, same day visitors etc.). This explains the distortion of some figures (for instance, the important growth of Palestinian ‘tourism’ in Egypt in the 2000s) or the lack of acknowledgement of the important number of Egyptian domestic tourism.
6. In addition, there are 272 (20%) floating hotels, mainly located on the Nile River between Luxor and Aswan. However big this number is, it represents only 17 308 rooms, which is 9% of Egypt’s total capacity.
7. Projects that have applied for the necessary licences to begin construction.
9. The floating hotels have not been included in this figure, as the numbers are not available for 1998.
10. This figure does not include cruise ships
11. More recent data is not available.
12. See note 6.
13. The governorate (*muhafazza*) is the largest administrative unit in Egypt.
15. These new urban and architectural structures, based on an international vocabulary, are also very much present in the middle and upper new residential suburbs of Cairo, where a market for residence in private compounds has been developing since the late 1990s at a very rapid pace (VIGNAL, 2003, 2010).
18. More recent data from the Ministry of Tourism is not available.
21. Yet, these figures can only be indicative: as demonstrated in a recent study (MASSoud, SAKR & SAKR, 2009), neither the official figures, nor the evaluation of the impact of this macro-economic success story on economic development (with a specific focus on indirect economic effects and the labour market) can be taken at face value, as the data used is very often flawed.

22. The same precaution has to be used with these figures as with the macro-economic ones cited above.


24. Source: Interview with J.-M. Kabalan, CEO and owner of Red Sea Oasis and Presidential Cruise groups, 3 January 2010, Cairo.


27. Kharafi group has many other activities, including food processing (the Americana company), and it is active in a total of 25 countries.


30. However, after 50 years, this is about to change as the 50-year lease Hilton had contracted with Misr Hotels, the public company owner of the building, expired in 2009. The hotel is due to reopen under the Fairmont Brand.

31. The Accor Group (France) has for instance 5 hotels in Cairo for both tourism and business clients, 2 hotels in Alexandria mainly for business clients, as well as the one (recently opened) in Minia (the first international hotel in a region, between Cairo and Upper Egypt, that has been characterised by troubles since the 1990s and that is closed to tourism – but the region has a business community) or the one in Ismaileyya (Suez Canal). Tourism demand is accommodated too, with 4 hotels in Upper Egypt (among which the historical « jewels » of the Old Cataract Hotel in Aswan and the Winter Palace in Luxor), 4 hotels in South Sinai, 1 hotel in the Red Sea.

32. The Accor Group is one of the rare exceptions, as it owns as well several of its Egyptian hotels.

33. A smaller share goes back to the financial and economic networks of the world economy and, of course, many direct and indirect revenues trickle down into the Egyptian society through tourism-related industries, outsourcing and labour.

34. The close knitting of private and public interest reflected by the composition of the Supreme Council for Tourism that pilots the strategy of the Ministry of Tourism, and where all the big names of the sector have secured a seat, including Mr. Hamed El Chiaty, founder and CEO of Travco, elected in 2009.

ABSTRACTS

The transformation of Egypt as a destination for mass tourism has profoundly reshaped the national territory. This article examines how the revolution of Egyptian tourism has led to the development of previously desert areas – the shores of the Red Sea and of the Mediterranean Sea – in an inversion of the previously Nile Valley-centred tourism maps. It shows that those new...
tourism territories are produced by a combination of processes acting on different geographical scales, from the local to the global. The article examines in particular the combined role of four players: the tourist, the state, the local entrepreneur, and the global tourism industry.


INDEX

geographyun 903, 912, 818

Mots-clés: État, globalisation, hôtels, industrie, marques internationales, mondialisation, territoire, tourisme

Keywords: hotel, industry, international brands, state, globalization, territory, tourism

AUTHOR

LEïLA VIGNAL
Maître de conférences en Géographie. Chaire d’excellence “Métropolisation et intégration européenne”, Université de Rennes-2/ESO-Rennes, France
leila.vignal@univ-rennes2.fr