Opportunities and Challenges in Applying the Concept of 'Mass-Customisation' to the Diversified Tourist Image of Egypt: The Supply Sector Perspective.

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Abstract : This paper examines the concept of mass-customisation from the tourism supply sector viewpoint. Although, mass customisation is a well identified concept as far as marketing of goods is concerned, it is still considered a less tapped concept in the field of services, particularly in the tourism sector. Hence, this paper is trying to redress this shortfall through examining how the concept of mass customisation could be applied to the new diversified tourist image of Egypt. Two sets of semi-structured in-depth interviews were conducted with key informants from the public and private tourism sectors in Egypt. Key findings emerged from these interviews revealed the opportunities and challenges of applying mass customisation in Egypt. Enhancing the competitive position of Egypt, increasing the tourist numbers and augmenting the sales for specialised tourist aspects represented key opportunities for mass customisation in Egypt. Whereas, limited segmentation strategies, financial constraints, as well as limited statistical information on the different tourist segments were major challenges for operationalising mass customisation in the destination. The paper finally suggest that the exchange of experience and managerial knowledge between the public and private tourism sectors in Egypt from one side; as well as with the international tourism trade, from the other side; through undertaking joint marketing and segmentation studies should be a core criterion for the successful application of mass customisation.

Key words: mass-customisation, personalisation, niche markets, image diversification, supply sector.

Introduction

Mass customisation is a new strategy for market segmentation (Pine, 1993). It is also called one-to-one marketing (Peppers and Rogers, 1993). This strategic approach requires tailoring the product differently for each and every customer while retaining the principles of mass production. The new trend in this approach lies in its ability to tailor a product to fit the

desires of consumers one by one yet do it in a mass production facility.

Other writers call mass customisation "finer segmentation" (Davis, 1996; Kara and Kaynak, 1997). This new concept sees each customer as a segment and treats each customer separately by fulfilling his/her unique needs and desires (Wiggins, 1995; Pine et al., 1995). As such, the concept of mass customisation can be defined according to Davis (1996: 177) as:

Mass customisation of markets means that the same large number of customers can be reached as in the mass market of the industrial economy, and simultaneously they can be treated individually as in the customised markets of pre-industrial economies... the ultimate logic of ever-finer differentiation of the market is markets of one, that is meeting the tailored needs of individual customers and doing so on a mass- basis.

Moreover, it is argued that the main reason for implementing mass customisation is due to the demand fragmentation in the market for goods. It is also argued that niche markets are becoming markets where power has shifted to buyers who demand higher quality goods that closely match their individual needs (Pine, 1993).

Mass customisation has also identified the dimensions along which customers differ in their needs rather focusing on homogenous market segments (Gilmore and Pine, 1997). Hence, the aim of mass customisation is to produce the exact products required by its targeted customers.

In the context of tourist destinations, mass customisation means the production and sale of large amounts of tailor-made services that will allow producers to supply flexible travel and tourism services so as to meet the demand of the new customers. Another advantage of mass customisation to tourist destinations is that it will allow producers to supply travel and related services at prices that are competitive with mass tourism services (Poon, 1997). Accordingly, the main focus of this research paper is to examine how the mass customisation concept can be applied to the new diversified tourist image of Egypt. This diversified image offers a product-mix that was designed primarily in order to satisfy multiple needs of each individual consumer. Hence this image has been augmented so as to offer

various tourist product(s) to its targeted segments in order to broaden the demand for other tourism services rather than focusing solely on its original cultural product.

The Egyptian public sector Authorities who were in charge of planning and implementing the diversification policy of the tourist product of Egypt were aiming in attracting an additional segment(s) of tourists to the destination- chief among them is the beach segment- in addition to its well established cultural niche market. Nonetheless, the steps or methods of implementation of this policy were not documented that would enable them to properly assess their intended targets. Hence, this research paper is mainly aiming at:

• Showing the salient elements of mass customisation when applied on destination images.

• Examining to what extent the elements of mass-customisation could be applied by the Egyptian public and private tourism sectors when promoting the new diversified tourist image of Egypt.

• Identifying the opportunities and challenges of mass-customising the new tourist image of Egypt.

The next section delineates the different elements and concepts of mass customisation and its interconnectedness with the tourist product. The following part explains the methodological approach employed by the researcher to identify the key obstacles that face the successful application of mass customisation in Egypt, as well as the possible opportunities that will facilitate its application. The major findings emerged from the interviews conducted with the key officials in the public and private tourism sectors in Egypt are listed in the subsequent part. The last section shows the conclusions and recommendations regarding the best practices suggested by the researcher for the successful application of mass customisation to the diversified tourist image of Egypt.

Types of Mass Customisation

Gilmore and Pine (1997) suggested four different approaches to achieve mass customisation. The first approach is called collaborative customisers.

This one involves a dialog with individual consumers; the aim of which is to discover their unique wants and needs, after which a customised product is created for them. The second approach is called adaptive customisers. This type offers a standard product that can be modified to some extent by its users. Cosmetic customisers is the third approach of mass customisation. It advocates for a standard product that is marketed differently to different customers. The final approach stands for transparent customisers. This approach provides individual customers with unique products without informing them that they have been customised for them. However, these approaches are designed for the marketing of goods rather than services. In the case of mass customisation services like the tourism services; special arrangements should be made in order to suit the nature of the tourist product. The following section discusses this idea in more details.

Mass Customisation And the Tourism Product

It has been argued that the basic premise of mass customisation is that customers can get the product exactly as they wanted. This can be done by eliminating unwanted attributes and hence not having to pay for them. Thus the ability of providing the exact product is deemed to be the major strength of mass customisation (Bardakci and Whitelock., 2004). In the case of the tourist product, it could be tailored by combining the requested needs of each individual customer or group of homogenous segments in the targeted market. For example, in the case of Egypt, it is currently offering a range of products within its new diversified image. The principal goal of diversifying its tourist image was to augment its product so as to appeal to as many tourist segments in its targeted markets. Hence it could be argued that the concept of mass customisation when applied to the case of Egypt could help the marketers to tailor this new diversified image by selecting certain attributes within a single product such as culture or beach products that could satisfy certain segments in their targeted markets. Consequently, the main problem of this current paper is to examine to what extent the marketers of the new diversified image of Egypt are capable of reselling the new image of the destination by including the mass customisation concept to their current marketing strategies.

Mass customisation or personalisation: is there a big difference?

Personalisation is perceived as a more comprehensive concept than mass customisation. This is due to the fact that it involves tailoring any or all aspects of the marketing strategy for each consumer (Goldsmith and Freiden, 2004). These strategic decisions could involve particular promotional activities such as advertising, distribution, pricing, as well as the product (Ibid.). Further, Goldsmith (1999) describes the evolution of the marketing strategy from the 4Ps associated with goods (product, promotion, price and place) to the 7Ps associated with services. Hence, he suggested that another strategic P will be added; that is personalisation. This new component will bring the marketing mix into the twenty first century by incorporating database marketing, relationship marketing and mass customisation (Pitta, 1998).

Moreover, it has been argued that personalisation is considered to be an important element in the overall marketing strategy. Thus, it should be addressed in conjunction with product development and as such decisions concerning the nature and degree of personalisation should help guide product development. In this context, managers undertaking product development should build into it the degree of personalisation they intend to offer to their targeted market. This policy could influence the way the product is manufactured through mass customisation (Anderson et al., 1997; Kelly, 1996; Oleson, 1998; Pine, 1993). In the context of tourist destinations, personalisation entails tourist planners and tourist promoters, to identify the important attributes in the image they project in their targeted markets based on individualised needs of their targeted customers. Hence, a regular follow up with the different segments in their intended markets through detailed consumer surveys will enable them to design the image that satisfy their potential customers' needs and expectations.

Another important feature of personalisation is that a firm that attempts to apply it could take its expertise in a personalised product in one category and expand into a new product category keeping the same brand name, but benefiting from the good reputation it has in its original category (Goldsmith, 1999). In the context of the case study of this research paper, tourist promoters of the new diversified image of Egypt has benefited from this

feature when they first projected the destination image by using the strong cultural attribute of the original image of the country in order to help selling the new product(s) that have been added to this attribute; chiefly among them is the beach product. This process of diversification was first initiated by the Egyptian public sector (the Egyptian development Authority) through the developmental scheme of beach tourism in the coastal areas of the Red Sea and South Sinai as early as 1982. Its intent was to spread tourism more evenly throughout the country. Accordingly the overseas tourist offices launched an advertising campaign bearing the slogan; 'Egypt is not only monuments' in an effort to shift visitors' attention to resort tourism over the Red Sea and South Sinai, and at the same time keeping the word monuments as the cultural product is the major attribute of the overall image of Egypt. (Moussa, 1993). Accordingly, the degree of personalisation or mass-customisation in the case of Egypt depends on the extent to which the Egyptian Tourist Authority has succeeded in offering a diversified destination image that offer a multiple product, so as to suit the individual needs of its targeted segments. However, the challenge of this approach lies in its ability to promote and sell these individual or tailor made products to larger segments of clients. The next section wi0ll discuss these concerns through employing a methodological approach that will aid the researcher in identifying the key threats as well as opportunities in applying the concept of mass customisation to the diversified tourist image of Egypt.

Methodology

The methodological framework of this paper was purely qualitative in nature. It was comprised of five semi-structured in-depth interviews with key responsible in the private and public tourism sectors in Egypt. The interviewing technique was selected in this paper in order to gain a thorough understanding from the private and public tourism stakeholders in Egypt on the possibilities of applying the concept of mass customisation to the diversified tourist product of the destination abroad. The interview method is also perceived as a tool that gives greater depth than other research techniques (Burgess, 1982). Further, the face to face interviewing method helped the researcher to gain an explanation of the different issues raised by the respondents. She was commonly able to get their cooperation, thereby

helping improve not only the volume of the data gathered, but also its trustworthiness or plausibility (Adams and Schvaneveldt, 1991).

A total of four in-depth interviews were conducted with four tourist professionals who are employed in two multi national tourism companies in Egypt. The planning manager and marketing director were selected from the first company; whereas the director of the Central Operation's Support department and the marketing director for Egypt were interviewed from the second company. The selection criteria of those key participant informants was based on their positions as seniors in two of the international tour operating companies in Egypt and as such, they adopt the major operational and marketing system of their mother companies abroad with the exception of some internal modifications which they alter in order to suit the Egyptian tourist product.

The second category of informants selected for this study represented a key official from the public sector. He was occupying a senior position as the general manager of Tourist Relations in the international tourism sector in the Egyptian Tourism Authority. This Authority represents the major official organisation for the promotion of the tourist image of Egypt in its generating tourism markets. The selection of this responsible was due to his post as he was a key information source for the devising and implementation of the major advertising campaign of Egypt in its tourist generating markets. Thus, the researcher was able to gather data from him concerning the policies adopted by the ETA regarding the Egyptian campaign and thus discussing the possibilities of mass customising the image of Egypt through this campaign.

A questionnaire was developed with selected key themes pertaining to the major research objectives mentioned in the first section of this paper. Two questionnaire designs were prepared for each category of key informants selected for this study. Questions designed for the first category of international tour operators were covering themes related to the tourist image of Egypt that is currently projected by those tour operators abroad; the market research undertaken by those tour operators in order to understand the attitudes and perceptions of targeted segments in their markets of origin; segmentation strategies for the new diversified image of Egypt; the

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competitive advantage of the Egyptian product over other destinations if those operators will apply mass customisation strategies to the new image of Egypt; the possible venues of cooperation with the public sector if mass customisation became a plausible strategy to be applied to the new diversified tourist image of Egypt and the strengths and weaknesses that could emerge as a result of the application of mass customisation to the new image of the destination.

The second questionnaire designed for the pubic sector informant comprised some analytical key themes such as the projection of the Egyptian image in its major advertising campaign abroad; who is responsible for the planning of this campaign in terms of its design and assessment; who is conducting the market research that help in feeding and directing the advertising campaign; what is the framework of the promotion strategies adopted by the ETA in its tourist generating markets overseas and the last theme was discussing the segmentation strategies adopted by the ETA in its advertising campaign and how it could be harnessed to apply mass customisation for the Egyptian product abroad.

The main aim of conducting these interviews with those key informants was to gather data through a highly interactive analytical approach. Their views and thoughts of the feasibility of applying the concept of mass customisation to the new diversified tourist image of Egypt constituted a reliable information base for this investigation due to their long experience in marketing the Egyptian tourism product overseas. The duration of each interview used for this study ranged between 45 and one and half hour. All the interviews were tape recorded (after gaining the interviewees' consent), transcribed and translated with the exception of one interview that was not translated as the interviewee was from the foreign workforce in one of the selected companies.

The researcher used thematic analysis to analyse the data produced by the different respondents interviewed in this study. These were divided according to the topics discussed in each interview. Similar topics were grouped together and emergent themes (Veal, 2006) out of these topics were selected. These themes were chosen due to their importance in terms of their analytical implications and relevance to the major study objectives.

The researcher were guided by each objective in this study in order to select the themes related to this objective and hence, extracting it from the cluster of data, putting it aside and then collecting all similar themes so as to compare them. Comparisons between similar themes helped the researcher in pulling off the major results of this study. The themes were presented in the form of verbatim (transcripts) of what was mentioned by the different respondents on each of the topics discussed during the course of the interviews. This technique of qualitative data analysis was used in order to mirror the feelings and reflections of each respondent, hence giving more depth into the analysis. The next section shows a detailed description of the analysis of the interviews used in this study together with its results.

Study Findings

The key themes presented in the questionnaire of this study were covering the three major objectives stated in the first section of this paper. Accordingly, the findings of this study will be elicited out of the answers provided by the selected key informants interviewed by the researcher on these major themes. The following section will list each of these objectives followed by the key findings pertinent to it.

Objective One: identifying the salient elements of mass customisation when applied on destination images.

The key findings elicited out of the themes related to this objective are as follows:

Finding One: Very Diluted Promotional Message for the Image of Egypt Abroad.

One of the key informants in this study declared that the projection of the image of Egypt abroad via its major promotional campaign executed by the ETA displays a very diluted image for the image of the destination. He expressed his opinion in the following quote:

When I would look at or see the ETA commercials on TV, what I am exposed to as a consumer? Or when I look at the website or whatever, I always get the feeling that they are basically trying to appeal to everybody. The message is very diluted. Its like we have beaches, we have horses, we have camels, we have pyramids, we have safaris. There is nothing we don't have. So come on down and enjoy everything we have...

The respondent in the previous excerpt shows that the planning of the new diversified image of Egypt is not targeting a particular segment of customers. Rather it is trying to display a multiple product that caters for different consumer needs. It is as if there is no segmentation of this new image done by the ETA. The promotional message is trying to attract the largest number of customers on the expense of targeting a particular segment or segments as the aforementioned quotation reflects. The same respondent accentuated his opinion in another instance:

In the promotion campaign of Egypt, I see girls riding horses on the beach and then pyramids and one minute someone jumping into a pool and then someone swinging a golf club... I definitely do appreciate that we have an enormous amount of tourist products to offer, perhaps more than other countries, but at sometimes wonder whether or not it's just becomes a bit too much for a tourist to digest...

The absence of a clear specialised campaign for the new tourist image of Egypt is what the above quote trying to echo. The key informant seems not in favour of an all encompassing promotional campaign for the new diversified image of Egypt without undertaking proper segmentation strategies for this image. He was trying to convey to the researcher that the ETA instead of showing everything related to the new product-mix of Egypt in a single campaign, should rather trying to concentrate its efforts in targeting a particular segment of tourists via displaying a single product like the beach product or the cultural product in its major promotional campaign and making the other products as subsidiary products for Egypt for other tourist segments. To cross analyse the opinion of this key informant, the researcher looked at the content of the major promotion campaign of Egypt that is currently broadcasts in the tourist generating markets of the destination. The analysis of this campaign is illustrated in the following section.

The Promotion Campaign of Egypt

Description:

The international advertising campaign of Egypt featured in its major

tourist generating markets was bearing the slogan *"Nothing Compares to Egypt"*. Its main promotional message was Egypt has it all. For example it shows most of the tourism products that the destination currently offers with the main cultural product dominating the scene as it was the sole tourist product of the country for almost two hundred years. Instances of it in the ad was represented in views of the Nile, the temple of Abu-Simbel in Aswan, smiling locals and waiters catering to tourists on Nile cruises, feluccas on the Nile and Camels touring the desert of Egypt. The ad then turns to show some tourists playing Golf while enjoying the sun, then a big scene of the Red sea with children playing football on the beach followed by some nice fishes swimming under water. The ad then shows some tourists walking in a row in the desert in a safari tour. Then the Egyptian countryside was depicted with its green fields, the ad particularly was spotting one of the locals picking an orange fruit and handing it to a tourist. Then the Egyptian bazaars were shown at night with tourists touring inside it and finally the citadel and sound and light shows illustrated the main tourist attractions in Cairo.

Analysis

As described above, the ETA in its planning of the major advertising campaign of Egypt was trying to appeal to many tourist segments. The advertising campaign shows many tourism products that Egypt is offering. These products are culture tourism, golf tourism, recreation tourism, safari/ desert tourism. This accentuates what the key informant was expressing in the preceding quotations that the ETA is trying to make Egypt appeals to many tourism segments without focusing on a particular segment and planning a specialised campaign for it. In the context of the main research problem of this paper which is the viability of mass customising the new tourist product of Egypt, the current approach of the ETA for showing all the attributes of its tourist product will not work. This is due to the fact that the concept of mass customisation stands for the finer segmentation of a single tourist product. This means that the ETA should think about segmenting each of its tourist products by creating new uses for this product and hence maximizing the opportunities of selling this modified product to more tourists. As argued in the first section of this paper that mass customisation within

the context of the tourist products means the production and sale of large amounts of tailor-made services that will allow producers to supply flexible travel and tourism services so as to meet the demand of the new customers(Poon, 1997). Therefore, the issue of segmenting each tourist product is a core element when planning for mass customising tourist products. This issue is further debated in the following section.

Finding Two: More Segmentation Strategies needed for the Egyptian Tourist Product-Mix

All the informants in this study agreed on the shortage of segmentation strategies undertaken by the ETA for promoting the new diversified image of Egypt. One of these informants expressed his opinion in this issue:

What the ETA is actually doing is that displaying the image of Egypt in its advertising campaign. This ad was offering you a cruise or doing activity on the beach or doing some horse riding. The question now is when I first come and show this advert with these different aspects of tourism; did I really know who exactly I am selling these products to?? Or know who is interested in these aspects of tourism that I am intending to show in my campaign and started to do proper segmentation to target these new segments before conducting my campaign? The answer actually is No. what actually the ETA did was that they displayed an advert without targeting a particular segment and that's it. This ends in showing a vague image of Egypt; by which they connected the image of Egypt with the pyramids, the Nile, the beaches and that's it.

This informant agreed with the previous one on the absence of proper segmentation strategies undertaken by the ETA for the new product-mix of Egypt. The new image of Egypt is shown multiple tourist products whish although look attractive, but at the same time they seem raw or not efficiently worked on as far as segmentation strategies are concerned. In this concern, Seaton and Woodward (2007:22) suggest that:

The typical pattern is for NTOs to inventory the tourist segments they are targeting, assert their attractiveness in terms of their numbers, financial potential and growth possibilities, and then indicate the marketing and promotional activities that will be directed to

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influence and stimulate the segments.

This means that the typical pattern of NTO promotional framework is to study the tourist segments they plan to target before planning their promotional campaigns. This should be done via conducting detailed market researches in each of its tourist generating markets so as to possess a vivid and to some extent a reliable picture on what these segments really want in order to tailor make their products to fit with the exact desires and needs of these particular segments. Pike (2008) endorse this opinion when he argued that segmentation can be undertaken by a priori means where the criterion variable for dividing the market is already known. This means that the NTOs generally should understand the needs and wants of their target segments, and hence be more capable of targeting them via proper means of promotion which should be the base of planning their promotional campaigns. In this context Seaton and Woodward (2007:26) added:

Perhaps most importantly, all 'segmentation-based' NTOs claim to target their chosen segments in their promotional materials. In other words, they are taking segmentation seriously and developing focused campaigns/strategies rather than relying on 'generic' campaigns in the hope that their chosen segments will respond to broad-brush messages about their destinations.

Hence, it could be understood from the aforementioned quotes that any NTO before embarking on its promotional campaign should have an in-depth understanding of the detailed needs of their target segments in their tourism generating markets. Hence be in a much better position to target them efficiently and effectively. However in the case of Egypt, this seems to be missing from the ETA agenda at the present time as claimed by the respondents of this research paper. Therefore, if there is no proper segmentation strategies undertaken by the ETA for the new tourist image of Egypt, the possibility of doing finer segmentation to achieve mass customisation; that is not only segmenting the overall image of the destination, but also doing a further step of undertaking more segmentation within each single product of Egypt would be remote at this current stage.

The methodology of implementing segmentation strategies is to conduct market studies on each of the major generating markets of Egypt as referred to earlier to understand the needs of the different target markets from one

side, as well as to get a more informed picture on other competitive destinations that compete with Egypt from the other side. One of the informants interviewed in this study proposed some of the ways that should be adopted by the ETA staff to help them understand the ever changing needs of their target tourists in a fiercely competitive industry like the tourism industry, and hence be in a better position to mass customise the new tourist product of Egypt. This issue is discussed in details in the following section.

Finding Three: The Importance of Conducting Detailed Market Research for the New tourist Image of Egypt.

To be able to position the current tourist image of Egypt in the international tourism market, the ETA ought to research the needs of its target groups via conducting market studies. This will enable her to better understand these needs, thus be capable of positioning Egypt among other competitive destinations that offer similar tourist products. An informant in this study expressed his views on this issue when he declared:

If I am in charge of promoting Egypt in the ETA, I would say: ok, let me go and inspect the destinations which my target groups have selected. Let me watch very carefully what these people are doing? How they spend their time? What really matter to them? Interview them in the resort like sit on the beach and say to them; why did you come here and not go to Egypt? I think you would find remarkable answers... But you see I think what happens is again it gets right back down to we kind of know best or we don't need to go that deep. Hence, what I see is that Egypt isolated itself from the world of tourism and we were just trying to target this group of people that we don't really know much about when it comes to selection of holidays. We think the fact that we have everything is enough.

The respondent in the aforementioned quote do not see that the Egyptian Authorities are doing enough in so far as the consumer profiles and needs are concerned. In his view these new consumers need to be carefully studied by the ETA staff in order to be able to understand what they need and therefore be more capable to target them with the appropriate tools. In this concern, Seaton and Woodward (2007) noted that primary research data is

collected by NTOs through a range of methodologies. Those which were used frequently included focus groups, telephone/questionnaire surveys, visitor satisfaction surveys, hotel occupancy studies and in-depth interviews. They added that other supplementary techniques mentioned by NTOs include desk research, mind mapping, unobtrusive observation, scenario planning, data mining, special interest media research, Tourism Satellite Accounts analysis, economic impact studies, tour operator information, Foreign Office research, customer feedback/complaints, brand and advertising tracking surveys, tourism barometers and perceptual mapping.

Accordingly, there is a wide array of methodologies adopted by the NTOs worldwide that enable it to gauge the actual needs and profiles of their targeted groups. In the case of Egypt, the researcher has obtained some documents of a research project sponsored by the Egyptian Tourism Economic Committee which commissioned a market research group in the UK. This group conducted a three phase research project that was designed primarily to guide strategy and message development of promoting tourism in Egypt. The first phase of this project was giving a background review of secondary, publicly available data on tourism trend around the world. Whereas, the second phase consisted of focus groups in a variety of target markets of Egypt like Germany, Russia, France, Italy, The Unites States, Unites Arab Emirates and the Kingdom of Saudi Arabia. Themes discussed in these focus groups included issues related to top of mind views of Egypt, positive and negative images of Egypt, most important factors in deciding to go on holiday to Egypt, satisfaction with experience in Egypt, Egypt's main attractions and what Egypt could do to encourage tourists to visit it. The third and last phase consisted of telephone surveys of leisure travellers, business travellers, as well as travel professionals in Europe, Russia and the Middle East. However, it was not clear how the results shown in those three phase research project were reflected in the promotional strategy of Egypt devised by the ETA. This topic will be discussed further with the themes related to the second objective of this study.

Finding Four: The need for a reliable statistical base for tourism trends in Egypt

The same respondent also highlighted a very important factor that should be carefully thought about if the ETA wants to mass customise its new

tourist product. This is the need for the existence of a reliable statistical information base that encompass the exact numbers and expenditure patterns of the different tourist segments and nationalities that visit Egypt annually. In this respect he said:

This is where Egypt has to actually have accurate statistics. This is because without having accurate statistics, she will not be able to pattern her success or failure and you won't be able to motivate yourself when you have the appropriate success. So you've got to have systems in place from the beginning. So again I think what's happening now is a waste of energy and money. It's just like shooting in the dark.

The key informant stressed the importance of having a good statistical base in order to measure and hence be able to evaluate the promotional effort undertaken by the ETA. For example, if the ETA wants to mass customise its beach product. This mission will be really a very hard task without the presence of reliable statistical information that could provide it with exact numbers of tourists who have visited the beaches over a number of years and what activities did they perform or services they wish to have during their visits. However, it seems that Egypt is not the only country that suffers from a lack of robust statistical base for its inbound tourism trends as Seaton and Woodward (2007) noted while collecting data from a number of NTOs worldwide:

International tourism statistics vary tremendously, in terms of their reliability, depending upon their source. Some countries have extremely robust 'inbound' and 'outbound' tourist figures based on large sample border surveys while others do with ad hoc and/or statistically inferior surveys. Some countries make details of their tourism statistics publicly available while others treat them as confidential.

Accordingly, the issue of having a reliable statistical base for tourism activities in a country depends mainly on a number of factors. Among them are the existence of good financial resources that can help in conducting the numerous and complicated surveys needed for the compilation of these statistics. Another factor which determines the existence of a reliable

statistical base in a destination is the presence of trained human resources who can operationalise a well developed statistical database based on scientific criteria and studied methodological framework. The issue of the level of professionalism of the local workforce in the tourism sector in Egypt is discussed further in the following part.

Finding Five: The level of professionalism needed to mass customise the new tourist product of Egypt

Another very important issue raised by one of the key informants of this study. That is the level of professionalism needed either from the public or private tourism sectors to mass customise the tourist product of Egypt. The problems highlighted in the previous section were about the strategies and methodologies needed that will help the ETA to plan and implement mass customisation effectively and efficiently in Egypt. However, the pendulum turns now to the human resources who should be in charge of this process. The question now is: Are they prepared to execute these strategies at this current stage? This means that if the segmentation strategies and the market surveys do exist; who is going to implement them? Or to put it clearly who is qualified to understand the mechanism of these studies and thus is able to operationalise them in a professional way. The opinion of the key informant on this issue is expressed in the following excerpt:

The future of Egypt's tourism is greatly sitting in the hands of not just tour operators but people. People with all different motives in life and in a minute I have seen somebody comes up with a new strategy for Egypt or another destination and the whole fail; it just changes overnight. So unless we are actually interfacing with these European tour operators, not just at the level of selling components to them, but participating in packaging the components together with a strategy if it is going to be mass customisation; if that's a strategy and getting them to understand and we both are working together but they (foreign tour operators) will not listen to us if we arrive at the table with no level of intelligence.

The key informant above was wondering on the possibility of the local human workforce in the tourism sector in Egypt to implement mass customisation. he views that the Egyptian tour operators sell only components

of the tourist product of Egypt. This is represented in hotel rooms, excursions, transportation, etc. while the foreign operator take these parts and package them together and finally sell them to his clients. It seems as if there is no ingenuity among the local operators in the selling and packaging of these trips. In other words, the whole selling process of the Egyptian tourist product is not guided by a strategy that clearly identifies the different components of the tour package, how it is going to be sold, to whom and for how much? If the destination wanted to go for mass customisation; which advocates for more in-depth segmentation into each of its tourist products like the cultural product or the beach product. Hence, it should be guided by an informed strategy that can identifies the add-on services that should be supplemented with each of these products and to whom it is going to be sold or who is going to benefit most from them. However, according to the respondent he couldn't see that this is happening at this current stage, as long as the foreign operator still has the final say about the success or failure of the Egyptian tourist product abroad.

In summary, the previous section delineated and discussed the salient elements that should be existed if the ETA wants to apply mass customisation successfully in Egypt from the viewpoint of some tourist professionals in the destination. Four major elements raised by the above key informants; these are:

First: effective segmentation strategies for the new tourist product of Egypt;

Second: the necessity of conducting market studies in the different generating tourist markets of the country;

Third: the level of professionalism that should be available for the successful implementation of mass customisation in Egypt; and

Fourth: The importance of having reliable statistical base for inbound tourism.

The next part shows the important themes raised by the interviewed respondents that are pertinent to the above elements and hence constitute the key findings of the second objective in this paper.

Objective Two: Examining to what extent the elements of mass-

customisation could be applied by the Egyptian public and private tourism sectors when promoting the new diversified tourist image of Egypt.

When the researcher was discussing further the previous elements which represent the core elements of mass-customisation if it is going to be successfully implemented in the destination with her two categories of key informants from the public and private tourism sectors in Egypt, they came up with the following findings.

First: Regarding the segmentation strategies that should be adopted by the ETA if they are planning for mass customising the Egyptian tourist product. The public sector respondent interviewed in this study mentioned:

We actually adopt a new trend in marketing now which is the e-marketing or marketing via the Internet. We have an Internet site now dedicated for this process. In this site you will find so many links that give you information about everything in Egypt. You can actually organise your whole trip to Egypt via this site. We also made additional units to complement this website. For example, we designed a unit for diving; another one for wellness tourism; a third one for desert tourism. This is our new trend in promotion; where we can segment our tourism product into many sub products like we created units for conference tourism, businessmen tourism, diving tourism, desert tourism, wellness tourism, etc..

The respondent in the above quote gave a very general description of the segmentation strategy or trend as he called it in the promotion policy of the destination. In his opinion the segmentation policy which the country adopts now is mainly confined into adding more tourist products like conference tourism, diving, desert tourism, etc. into the main cultural product of Egypt. this takes the form of providing the potential tourist with information on how to book for it and how much that will cost and so on. However, he didn't give the researcher any idea about if there is a specific strategy adopted or implemented for segmenting the new tourist product of Egypt. Instances of this could be how do they select their target groups? In other words, what are their selection criteria for these new groups? Is it their level of income, age, general interests, etc..

By cross-analysing what the previous respondent has said with the tourist professionals interviewed in this study, they came up with the following themes.

Finding One: The ETA should plan for a single campaign for each tourism product

One of the private sector respondents gave the researcher a very good example on how the ETA should go about mass customising its tourism products. From his experience in working as an international travel professional for almost 20 years, as well as working in Egypt for about 10 years. he expressed to the researcher his personal professional view if he is in charge of planning the advertising campaign of the ETA. He said that he would have opted to go for a special campaign for a single product like the conference product if he wanted to position the new image of Egypt in the international tourism market. His opinion is reflected in the following quotation.

The advertising campaign conducted by the ETA now actually looks like where the famous saying: "a jack of all trades master of none". I am not saying that this is the case but I am thinking that for example, incentive and conference travel. What I believe is that Egypt has enormous potential for that. There was a big ad for this type of tourism published in a trade magazine in Europe since 8 or 9 years ago; where they said: "Incentive and conference travel is more than just a smile" and the reference was made to Egypt and then through the article it started to go on about infrastructure, about efficiencies, and on and on about what would be required. That always stuck in my mind and I am concerned that may be till this day, it is still in another's people's mind globally. This hasn't been updated since, because we do have facilities here today. Look at the hotels that have been built during the last 10 years in the resorts and in Cairo, the conference centre in Cairo. Definitely, we've got what it takes to put on a decent incentive and conference campaign. Besides, the pre and post of what we have to offer for conference is incredible compared to other countries. But, we have not positioned ourselves in that market strong.

The informant highlighted what the ETA should do if they want to compete with other tourist destinations in so far as their new tourism product-mix is concerned. In his opinion, Egypt has got many points of attractions. It is represented in its wide array of products like culture tourism, beach or diving tourism, conference tourism, safari tourism, etc. However, this doesn't mean that the ETA should put them all in one bundle and sell them to tourists. This will never work in this very general method. What should be done from his view is to sell this augmented product separately, by cutting it into its single constituent aspects and then designing a particular campaign for each of these aspects and selling it to its target group. This should be preceded by detailed segmentation studies on the different segments of tourists globally and who could be interested in each of these particular aspects and so on. If the ETA adopted this methodology, the respondent claims mass-customisation will have a high opportunity of success. He exemplified his view in a campaign executed by the ETA for conference tourism for almost a decade ago which actually had a very positive impact as he declared; but nonetheless wasn't repeated again by the Egyptian public tourism sector despite its success.

Another informant echoed this opinion in more detail in another instance: **The ETA doesn't know anything about the specific needs of our customers. They have to bring the product a little bit closer to the clients. We have got too many products that we can mass customise to our customers. For example you can market your cuisine to tourists. We can do carnivals to our customers like what happened in Aswan for example. There was once something called 'Tea with the Nubians'. This product is actually to get tourist to talk with the Nubians and know about their history and culture through sitting with them have tea and taste their hospitality. Thus, actually I can sell each destination within Egypt separately because each governorate has its own tourist product. This is the diversification I am talking about. So briefly speaking we have to bring all the components of the Egyptian product and see what we can sell and what we cannot sell to our target markets.**

The key informant stressed the importance of going for specific products for specific customers if the ETA wants to implement mass customisation

in the destination. These specific products should be promoted through single campaigns. He believes that to better position Egypt in a highly competitive market like the tourism market is to go for specific audiences. Egypt has got a lot of potential but it lacks the managerial perspective that could plan for it so as to understand its positive tourist aspects and put it in its right place. Hence, market studies, particularly segmentation studies should be regularly undertaken in order to understand the ever changing needs and trends of the current international tourist market.

Seaton and Woodward (2007) asserted the opinion of the previous two respondents when they noted that there are two types of segmentation. These are called A priori and A posteriori type of segmentation. The first type of segmentation is where the base for segmenting a market is specified in advance by observation, experience or judgement of tourist behaviour patterns rather than on who they are e.g. purchasers of a particular product package, length of stay, etc. . Whereas, the other type of segmentation or A posteriori avoids the tendency towards premature market selection. The basis of this type of segmentation - the writers note- is that it is not determined beforehand, but rather emerges from the results of research surveys in which many tourist variables have been included for e.g. visitor surveys. In the case of Egypt, both types of segmentation have been undertaken by the international market research group in the UK to study the image of Egypt held by visitors in some selected international markets like Russia, Germany, France, Italy, The United States, Unites Arab Emirates and the Kingdom of Saudi Arabia. The research group conducted focus group interviews with a total of 14 groups of visitors in total from the selected 7 tourist markets. In each of these markets, one group was held with leisure travellers who have not been to Egypt (A priori segmentation), while the other group was held with leisure travellers who have been to Egypt (A posteriori segmentation). However it is not clear how the results provided by those surveys have been used by the ETA in order to modify or change its promotional policies according to these emerging results. Nevertheless, the researcher has attempted to analyse the promotional strategy devised by the ETA for its major tourism generating markets. This is discussed in more detail in the following section.

• **Promotional strategy of the ETA**

The promotion strategy of Egypt for the year 2007-2008 has devised some general objectives. Among them are:

• Increasing the rate of tourism growth from the main generating countries to Egypt such as Germany, UK, Russia, Italy and France, as well as the promising markets like China, India, Korea and Australia, in addition to the strongly developing markets like Eastern Europe.

• Developing the Egyptian tourism product in terms of undertaking ongoing diversification through adding more tourist products to its original cultural product such as desert tourism, yacht tourism, golf tourism, as well as spa tourism.

• Targeting new tourist segments particularly those who are characterised with high spending; and lastly

• Promoting Egypt as an all year round destination.

In order to achieve these objectives, the ETA has set up some core steps in terms of promotion, marketing studies, marketing strategies, as well as steps for updating the traditional promotional tools like the printed materials such as maps, travel guides and the different ads on the Internet.

• Regarding the promotion steps, the ETA has planned to continue in executing an integrated promotional campaign that targets a total of 24 generating tourism markets. The tools used in these campaigns include Internet campaigns, printed promotional materials, in addition to specific campaigns directed to the travel trade, public relations campaigns in the different generating markets of Egypt. The selection and timing of the use of these different tools is based on market studies of the international tourism trends.

• Concerning the marketing studies, it has depended mainly on conducting some studies executed by specialist international market research companies (like the study referred to earlier in this paper). These studies used as a starting point for an all encompassing marketing strategy for the new tourism product-mix of Egypt. This strategy will include different studies on consumer profile surveys, competitors' reviews, image and perception surveys, post test for the impact of the international promotion campaign of Egypt, as well as studying the profile of the different generating markets of the destination.

• Whereas other marketing strategies planned by the ETA were directed for certain tourism aspects such as the diving product, spa and wellness tourism, desert tourism, and golf tourism. These strategies based on some criteria. They were represented in conducting more detailed studies on the target markets, as well as the selected Egyptian tourism product; activating the cooperation with the Egyptian tourism representatives in Egypt, in addition to the directors of the Egyptian NTOs abroad, as well as with some specialised institutions for promoting certain aspects of tourism like spa and health tourism. Other criteria included using comprehensive marketing plans that contain all the promotional tools suitable for each of the tourist products on offer such as attending trade exhibitions, newspaper ads, specialised conferences, as well as contributing with the international travel trade in their printed promotional material for Egypt (ETA, 2007).

These were the major steps of the latest tourism promotion plan of Egypt. Although, there seems to be an effort exerted by the ETA in terms of modernising its traditional promotional tools in order to be able to compete with the latest techniques and tools used in the international tourism arena, operationalising these tools or knowing how exactly the outcomes of these tools will be used is still not clear. The plan was stating all the tools and strategies and criteria devised by the ETA so as to make the new tourist image of Egypt looks more attractive and thus more competitive with other tourist destinations. Bearing in mind, the fierce competition of the tourist products worldwide, the ETA seemed to be very keen in making Egypt try to catch the potential tourist eye and offer him all what he needs. Nonetheless, there is no steps mentioned that can indentify how the impact of each of these tools will be measured in terms of the number of tourists it will attract, from what segments, and how exactly it will influence their decisions to choose Egypt over other competing destinations. Seaton and Mathews (2003) in their review of the evaluation methodologies undertaken by the different international NTOs to measure the impact of their promotional activities stated that there are five basic phases for the process of evaluation. These are:

• Clearly defining the objectives for specific marketing activities, such as increased tourism revenue or increased awareness of a destination.

• Monitoring inputs i.e. the resource invested in specific marketing activities.

• Monitoring outputs i.e. the reaction to specific marketing activities such as the number of responses to an advertising campaign.

• Measuring impact i.e. quantifying the benefits of the activity and the degree to which objectives have been met, such as the amount of tourist expenditure in a destination that is directly attributable to the specific marketing activities.

• Measuring impact relative to input i.e. the benefits achieved in relation to the costs (Return on Investment) of specific marketing activities.

They further added that one of the robust techniques that can be used by the NTOs to measure the effectiveness of their marketing activities is called the conversion studies. These studies strive to measure the number of incremental trips, bookings or revenue generated through NTO activities such as a brochure, advertisement, broadcast commercial or NTO customer information service. It also depend upon a response mechanism or call to action being built into the activity e.g. a coded reply coupon in press adverts or a toll-free number for broadcast campaigns. To facilitate the measuring process; the names and addresses of enquirers are recorded (data capture) and a random sample is later re-contacted through a survey to find out whether or not they actually undertook trips on the strength of the information received, or planned to do so in the future.

This level of detail for measuring the real impact of the promotional and marketing effort undertaken by the ETA is still not clear in any of their written documents. Hence, it is difficult to decide whether the number of tourists that come to Egypt annually are actually the real outcome of the major promotional campaign conducted by the state or it was due to other reasons. Even the studies conducted by the research group in the UK discussed earlier in this paper were concerned about understanding the perceptions of certain tourists on some aspects in Egypt such as the satisfaction levels of their visits, Egypt's main attractions, most important factors in deciding to visit the destination, popular activities in Egypt and so on. The research group has actually arrived at very useful results but it is still lacking the tracking of these results with the same respondents whom they interviewed. For e.g. whether the ETA has altered its promotional activities according to these views? And have these consumers felt that change? And what were their reactions regarding these changes if they

have actually occurred? Without the ETA providing the real answers to these core questions, it deemed very hard to assess the impacts of all the promotional activities undertaken by them.

Nevertheless, it seems to the researcher that a lot of effort is executed for improving the exposition of the new tourist image of Egypt abroad but these efforts are disjoined or they are executed separately without any kind of follow up to its different phases. If the ETA wants to compete with other international tourism destinations, all these promotional efforts should be well co-ordinated with the travel trade either local or international from one side, as well as the ultimate user who are the real consumers of their products from the other side. This will lead us to the second theme mentioned in the previous section related to the Importance of Conducting Detailed Market Research for the new tourist image of Egypt. This theme is discussed further in the following part.

Second: Concerning the market research that should be undertaken by the ETA for the new tourist image of Egypt; one of the tourist professionals interviewed in this study mentioned his opinion in this regard which lead the researcher to the second finding pertinent to the second objective of this study. This is discussed further below.

Finding Two: The need for coordinating efforts between the ETA and the travel trade via research

The tourist professionals interviewed in this study mentioned to the researcher that the new image of Egypt now is missing a proper market research that can clearly identify the trends in the international tourism market. In this respect, one of them stated:

You know what we need is we have the ETA that does all this glitzy advertising and you have got the ETA with the money. What is missing in between all of that? It is the Research to guide the ETA and to guide the advertising company. This is because what I think is happening; let's face it. The advertising companies are businesses and they are slick businesses with very slick people working in them. Ok. They could come in and do amazing presentations if that wow you in a minute, especially at the

government level. What I think needs to be in the middle of that is a consultancy team that actually can go and understand the competitive countries and come back and realistically make statements to the Ministry or the ETA.

What is stated by the respondent in the above quote is actually happening as discussed earlier. An international research group does really exist and it did three phases of surveys and focus groups in order to understand the international tourist perceptions of Egypt as a tourist destination. However, due to the lack of communication between the ETA and the travel trade either local or international on the outcomes of this process, as well as the absence of any documentation that can demonstrate how the findings of these three phases of research have helped the ETA in measuring the impact of its promotional efforts, nothing will be acknowledged or felt as indicated by the above respondent.

Another respondent highlighted this issue further in another occasion:

There are good facilities provided with the new tourism product-mix of Egypt. But, I have to let sales people know about the product in order to go and sell it abroad. These details are not there for those people to go and get it and work on it. So it is still done individually, by which each tour operator is depending on himself to get this information and start to sell this product to the international operator. The ETA does not help in this matter.

According to the above excerpt, results of the promotion campaign and the market research done by the ETA through its international research group are not channelled properly to the local tour operators who are actually considered to be the sales team of the Egyptian tourism product abroad. However, before sending these results to the local operators, it need to be further analysed and worked on through setting proper evaluation mechanism that can accurately assess its outcomes and consequently be able to monitor the degree of its level of success. However, the researcher think that one of the key challenges that deter an integrated process of evaluation which need a full integration from all the tourism sectors concerned is the level of professionalism among the local tourism workforce in Egypt either in the public or private sectors. This might explain why the results of the surveys and focus groups conducted by the UK research group where not used

effectively by the ETA. It is due to the absence of trained personnel in the Egyptian tourism sector that can efficiently process the results of the market research and thus be able to monitor and assess its results. This important reason constitutes the third finding related to the current research objective. It is the view of the key respondents of this study to the core reasons which influences the level of professionalism needed for the effective application of the mass-customisation concept in Egypt. This issue is elaborated further in the following part.

Third: By asking the respondents about how to improve the level of professionalism needed for the personnel in the Egyptian tourism sector either public or private in order to be capable for the efficient application of the mass-customisation strategy in Egypt, they came up with the following finding.

Finding Three: The importance of conducting training courses among the human workforce in the Egyptian tourism sector.

One of the key informants of this study expressed his opinion in this issue:

They do miss the know-how. Hence, you need to work on these internal problems first before working on your promotion campaign and segmentation strategies. For example, the ETA should bring all those sales people who work in the industry and conduct training courses for them in order to raise their awareness on the important information they should know on the different types of tourism in Egypt such as the bird watching, the infrastructure that is provided for this type of tourism and so on. Parallel to these courses, they should conduct other courses for the staff at the ETA itself to also raise their awareness to important information they should know on the different tourist aspects in Egypt. Hence, both tourism sectors in Egypt will be able to speak the same language. But to work separately from each other, we are not going to achieve much.

Lack of coordination and integration in terms of the details of the tourism facilities that are currently offered by the Egyptian tourism sector is one of the crucial elements that deter the whole process of promoting tourism in Egypt as the above quote refers. This is due to the fact that whatever work or effort is done as far as promoting the new types of tourism in Egypt is

concerned; it will not be translated into successful outcomes without the full cooperation and integration of all the sectors involved. Without the existence of this integration mechanism, all the work will take the form of individual initiatives characterised by lack of integrity, disjoined actions, which will ultimately influence the decision-making process, and hence the overall image of the destination. Therefore, there is a need for conducting specialised training courses for all the staff either in the public or private tourism sector ?as the previous respondent advises?. These courses should take different levels. For example, preliminary level should be on general information needed by tourists on the different aspects of tourism in Egypt such as selecting a sample of principal hotels with their recorded capacities, important sightseeing and tourism sites, the different facilities offered at each site and so on. These courses should be directed to staff who have direct contact with tourists such as transfer men, tour guides, as well as tour leaders. The second level of training courses should be more advanced as it would encompass more specialised courses directed at the managerial level such as tour operators and the heads of the different departments such as research and monitoring department at the ETA. The contents of these courses would include applications on the latest tourism market research techniques in terms of different quantitative and qualitative methodologies, as well as evaluation mechanisms of the promotional campaigns conducted by the ETA abroad. If the ETA succeeded in conducting these courses at the destination, there is a high possibility of success for the effective application of mass-customisation in the destination.

Finding Four: The need for a mixed team of Egyptian and foreign staff to work together for the ETA for the effective exposure of the new tourist image of Egypt abroad.

Another key respondent mentioned his view when discussing the level of professionalism needed for the promotion of the new tourist image of Egypt and thus the tendency for the application of mass customisation in the destination:

I think you need a combination of Egyptians and foreigners to work on the major advertising campaign of Egypt. Or they have to take that campaign and move it to their agency in France or London

or Brussels and test it with their colleagues at the advertising agency over there. Not just do it here locally as Egyptians because most of these advertising companies here are going to be I would say probably 100% Egyptians.

The respondent above advocates for the foreign advertising company to work with the Egyptian staff at the ETA regarding the design and direction of the major promotion campaign of Egypt abroad. He sees that the Egyptian staff need the input of the foreign tourist professionals to better understand what the ultimate user needs from the tourist product of Egypt. Although the ETA hire foreign advertising company in its major generating markets aboard but this is in terms of deciding the good timing for the exposure of the different promotional material of Egypt and where to expose them but not sharing them the designing of the contents of these ads. Hence, the foreign staff could help the ETA in terms of conducting brain storming sessions with selected high officials from the ETA concerning choosing the suitable shots for the different ads of Egypt, how to be presented and to whom. This will enable the ETA personnel in getting closer to potential consumers in the international tourism market, thus understand their needs and consequently position the right product for the right segment.

Fourth: Regarding the absence of reliable statistical base based on scientific criteria that can give indicators into the growth percentages of the different tourist nationalities in Egypt. One of the interviewed respondents reflected this issue in the following finding.

Finding Five: Availability of reliable statistical base is a key factor for the success of mass-customisation in Egypt.

One of the challenges that you have actually and Egypt need to think about this; if Egypt cannot really produce reliable tourist statistics and share them on a regular basis with the ground handlers here, because we've become spokes people for these tour operators abroad, and as well we can pass these data over to those tour operators abroad to be able to plan the product; then those risks of the product developments will be based more on a gut feeling as opposed to that pure hard facts. Thus, it will be hard to convince your manager in the UK that I would like to put three pages in a

**brochure for a safari in a new brochure when it is going to cost him
I don't know how much money and it is not going to be based on
actual figures?? That's not going to apply...**

A key factor for the success of mass customisation in Egypt as the
above respondent expresses is the existence of a strong statistical database
for tourism in Egypt. This will act as an important information source for
the process of segmentation which is one of the key elements of mass
customisation. In this respect, Seaton and Woodward (2007) argue that the
foundation for good segmentation is based on the collection of robust tourism
statistical data. They added that tourism visitor surveys would provide the
most successful source of identifying the different tourism segments that
visit the host destination. The most common factors on statistical collection
identified by the NTOs they interviewed were activities undertaken during
the trip(e.g. skiing, diving, golf, culture, etc.), booking mechanism, contact
with the NTO, demographic data(e.g. age, occupation, income, education,
family, etc.), motivations(e.g. recreation, culture, adventure, sun-seeking,
etc.), purpose of visit (e.g. business, VFR, leisure, education, special events,
etc.), sources of information when planning a visit to a country and type of
accommodation used.

These are some of the data that should be available with the destination
public sector Authorities for the proper segmentation of their target markets
as the above writers claim. However, to solve this statistical shortage at the
destination, there was an important initiative adopted by the Egyptian
Development Authority (one of the authorities that belong to the Egyptian
Ministry of Tourism and entrusted with the planning and development of
tourist projects at new developing areas) in collaboration with the Central
Agency for Public Mobilisation and Statistics in Egypt. This initiative has
resulted in the production of a sample survey aiming at developing the
statistical system in Egypt in order to be able to estimate the total tourism
expenditure in the destination. This survey was conducted during the years
of 1990, 1992, 1994 and 1996. The methodology of this survey was based
on grouping visitors according to their nationalities, and then distributing
questionnaires on them in the different airports during their arrival and
departure. This method was considered to be the best method in terms of
its accuracy as it depends on asking tourists directly on their average length

of stay, which will then lead to determining an average expenditure for each nationality. This rate will be used as a base to calculate the total expenditure of tourists coming from each country. However this method had suffered from some disadvantages. Chief among them is the limited size of the sample which represented only 1.2% of the overall selected sample. In addition it didn't cover all the principal tourist departure points. The survey also was missing some important statistical data such as statistics on domestic tourism in Egypt, as well as statistics on outbound tourism, as well as numerical clarification of the actual contribution of the tourism sector to the overall Egyptian economy through the independent sectorial relations (Higazy and Abdelrahman, 2007). Nevertheless, the researcher views that these surveys were a very good initiative adopted by the Egyptian public tourism sector to establish an accurate statistical base in Egypt based on scientific criteria and actual rather than hypothetical data.

These were the solutions mentioned by the different key informants in this study which reflected their personal views on the possibility of the application of the key elements of mass-customisation in Egypt. These solutions are represented in:

• First: The ETA should plan for a single campaign for each tourism product.

• Second: The importance of establishing coordinating efforts between the ETA and the travel trade via research and consultancy.

• Third: The need for training courses for the human workforce in the Egyptian tourism sector, as well as sharing knowledge and expertise through hiring foreign staff to work with the ETA staff particularly concerning the execution of the major advertising campaign of Egypt in its major overseas tourist markets.

• Fourth: The importance of having a reliable statistical base for the success of mass-customisation in Egypt based on actual tourist performance.

The next section will draw the findings related to the third and final objective in this study.

Objective Three: Identifying the opportunities and challenges of mass-customising the new tourist image of Egypt.

The previous sections delineated the findings pertinent to the first and second objective of this study. The findings of the first objective represent the core elements that should exist ? from the private sector professionals' viewpoint ? if the ETA considers mass customising the new tourist image of Egypt. However those core elements represent a challenge for the ETA at the present stage as their application is hindered by many factors; chief among them are the human and financial resources which act as major obstacles towards the effective application of mass customisation in Egypt. Nonetheless, as this research suggests after the analysis of the different stakeholders from the public and private tourism sectors who participated in this study, there are some solutions proposed for each of these challenges. These represent the findings of the second objective of this paper.

On the other hand, if the ETA succeeded in the application of mass customisation in the destination after the consideration of the above stated solutions, there are going to be good opportunities for the effective positioning of Egypt in the international tourism market. The important findings related to these opportunities are listed in the following part.

Finding One: Mass-Customisation will give Egypt a good competitive edge among other destinations.

All respondents from the private sector who were interviewed for this study agreed on the many benefits that Egypt could gain through mass customisation. Chief among them is the good competitive position for Egypt if it successfully applied mass customisation. His view is reflected in the following quotation:

Market research is indicating that people are so well travelled now; they don't want to be herded around in large groups and if they have a little bit more money, they are prepared to be what they perceive as an independent traveller; which could be mass customisation. Its how you positioned it to them. So there is recognition of this in Europe now. Everybody moved towards mass. Hence, if Egypt could do this mass customisation successfully, this will offer her a good competitive position.

As the above respondent notes, if the ETA could implement mass customisation successfully through offering more facilities into its different

products like the beach product for example. This would give her a high competitive position over other destinations who offer the similar products.

Finding Two: Mass customisation will bring increased tourist numbers into the destination

Another advantage mass customisation could offer is it will increase the overall tourist numbers in the destination as a result of selling the products to high numbers of tourists. This is given in the following excerpt:

If we do apply mass customisation properly in Egypt, it will have great advantages actually. The tourist numbers will increase. I will sell more trips or more than one product to each segment. The confidence in our product will definitely increase. This is because you have reached a certain level of details about your product that do not exist anywhere. It will have endless advantages for Egypt as a tourist destination.

The new combinations of products that will be offered through mass customisation to tourists after undertaking careful studies into the needs and trends of the international tourist segments will lead to increased volumes of tourists to the destination which will lead to more revenues.

Finding Three: Mass customisation will boost the selling for some specialised aspects of tourism in Egypt

Mass customisation could actually help Egypt by increasing the selling of some aspects that are characterised by low demand. An example of these products is spa tourism. A key respondent said about this:

We do have spa treatments in some 5 stars hotels in Egypt. But when I come to talk about treatment, it exists in certain sites like hammamat Pharaon and Oyoun Moussa that possess sulphur spots for treating skin diseases. But still these places are lacking enough information available about the number of hotels close to these sites for the tourists to stay in after finishing their treatment courses. There must be something written for these services that could be used as references for all the concerned stakeholders who work in this type of tourism. Therefore, Egypt could have a high opportunity of mass customising this type of tourism by planning an integrated campaign under one type of tourism which is spa tourism.

Mass customisation would allow the ETA to augment the selling for its

individual tourism aspects, particularly those that are characterised with small numbers like spa tourism as mentioned in the above extract. If the ETA provided the needed facilitates into each of these tourist aspects and then planned a good advertising campaign for it that could inform the potential tourists of these facilities and how it could be used, there will be a high potential for increasing sales for these specialised tourist products.

The following table summarises the opportunities and challenges of mass customisation in Egypt that could also be applied at any tourist destination.

Opportunities of mass customisation in Egypt

Challenges of mass customisation in Egypt	
• High competitive position. • Increased tourist numbers. • Augmenting sales for specialised tourist products. • Limited training for human resources. • Limited statistical information on the different tourist segments.	• Limited segmentation studies. • Lack of coordinated efforts between the public and private tourism sectors. • Financial constraints.

Conclusions, Recommendations and Future Research

This research paper represents an initiative for the application of the mass customisation concept in Egypt, as well as any other tourist destination that offer similar tourist products. The major results of this paper suggest that effective segmentation strategies; detailed market studies in the different generating tourist markets; high level of professionalism among human resources; possessing reliable statistical base for inbound tourism are key elements that should be available at any destination attempts to mass customise its tourism assets. However in the current case of Egypt, these elements represent somehow a challenge from the tourism stakeholders' viewpoint at this stage in the destination. Accordingly, they suggest some solutions that should be taken into consideration by the ETA, if it is seriously thinking about mass-customising the new tourist image of Egypt. These are:

- The ETA should focus its promotional campaigns on some facets of the Egyptian tourist product such as beach tourism or conference tourism in order to highlight its special facilities and create new ones so as to its satisfy new targeted specialised segments.

- There should be an exchange of experience and managerial knowledge between the public and private tourism sectors in Egypt; as well as with the international tourism trade through undertaking joint marketing and segmentation studies.

- To achieve the above recommendation; the level of professionalism of the public and private sector personnel in Egypt should be raised through the execution of highly specialised training courses, particularly concerning the implementation of the major advertising campaign of Egypt in its major overseas tourist markets.

- The necessity of resuming the attempt initiated by the state in the early nineties for establishing reliable statistical base in the destination.

- Nonetheless, the concept of mass customisation is considered to be a relatively new concept as far as tourism products are concerned. It has always been confined to the field of marketing goods rather than services. This is due to the relative ease associated with the marketing of goods represented in the possibility of trying the goods intended for purchase before its real purchase. This might make the application of mass customisation in the domain of services an expensive and rather a risky option for tourist managers. However, this paper stimulates further research in this less researched area of marketing services through providing a workable framework of mass customising tourist services.

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