

THE EARLY IMPACT OF COVID-19 ON TOURISM INDUSTRY: ASSESSMENT OF EGYPTIAN TOURISM SUPPLY CHAIN

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ABSTRACT

This paper discusses the effect of COVID-19 on tourism industry in general and on Egypt in particular and review the emerging literature to better understand, manage and valorize both the tourism impacts and transformational affordance of COVID-19 and to stimulate knowledge development in the tourism sector. This paper is based on an overview of the relevant literature on travel and tourism industry as well as hospitality service trends. To achieve purpose of this paper, first, the paper discusses the impact of COVID-19 as an international tourism disruption by investigating the circumstances of different tourism sectors affected by the pandemic. The paper continues by discussing the major impacts, behaviors and experiences of COVID-19 on selected tourism supply chain members in Egypt. Then, the paper provides a rapid assessment of the reported procedures of the three major tourism stakeholders in Egyptian tourism (namely tourism demand, supply and government and policy makers) during three COVID-19 mitigation stages (response, recovery and restart).through to the end of March 2020. Finally summarizing the early resilient practices to the tourism industry in over 2020 and beyond. This paper provides an overview of the COVID-19 tourism impacts and implications and suggest mitigation strategies for tourism research. Despite the sector's resilience in response to previous crises, the sheer depth and breadth of COVID-19-related impacts on tourism and economy means a quick recovery is unlikely.

Keywords: Covid 19, Egypt, Hospitality industry, Tourism supply chain

1. INTRODUCTION

By year-end 2018, the growing importance of tourism has been globally acknowledged from an economic, socio-cultural and pro-environmental perspective (Reddy, Boyd and Nica, 2020). However, tourism is a highly vulnerable industry to numerous environmental, political,

socio-economic risks (e.g. terrorism, earthquakes, Ebola, SARS, Zika) (Novelli, Gussing Burgess, Jones, & Ritchie, 2018), it used to and has become resilient in bouncing back from various crises and outbreaks. The COVID-19 (declared as a pandemic by WHO, 12 March 2020) significantly impacts the global economic, political, socio-cultural systems. However, the resilient nature, the unprecedented impacts and circumstances of the COVID-19, demonstrate signs that this crisis can have deep and long-term transformational and structural changes to tourism as socio-economic industry. Health communication strategies and measures (e.g. social distancing, travel and mobility bans, community lockdowns, stay at home campaigns, self- or mandatory-quarantine, curbs on crowding) have halted global travel and tourism which severely cause damages to national and global economies.

The direct and indirect economic consequences and damages associated with COVID-19 are expected to vary across sectors. Those sectors and activities involving face-to-face interactions are likely to be disproportionately affected including hotels and restaurants, air travel and tourism services.

The COVID-19 give impact on the demand and supply of the products worldwide. The domestic consumers demand in most countries probable to drop sharply.(Bakar and Rosbi, 2020). Demand would fall due to factors such as foreign buyers delaying or withdrawing orders; tourists, both local and foreign, cancelling trips; and the declines in the stock market (Khan and Yasmine Khan, 2020). On the supply side, there are also probable to be disruptions in developing countries, as there may be shortages of imported raw materials and spare parts (Khan and Yasmine Khan, 2020). Being one of the most important global employers (1 in10 jobs are directly related to tourism, UNWTO, 2020) and the major GDP contributor for several countries, tourism and COVID-19 are the epicenter of all international discussions and economies. Moreover, within the growing industry discussions and research about tourism and COVID-19, there is a universal call to see and use the pandemic as a transformative opportunity (Mair, 2020). Industry should not only recover but also reform and reimagine the next normal and economic order (McKinsey, 2020),

Egypt has been a rising star among emerging economies in recent years. As a sign of increased stability, the tourism sector recorded its highest revenues in 2018/19. Continued efforts aimed at improving Egypt's business climate were expected to lead to even stronger private sector growth and economic diversification in 2020 and beyond.(Breisinger *et al.*, 2020). Egypt's recent economic success and on-going reform efforts will almost certainly be interrupted by the COVID-19 pandemic. While the government is taking actions to contain the spread of the virus, international travel restrictions are already limiting tourism to the country.(Breisinger *et al.*, 2020)

Therefore, the purpose of this paper will focus on the effect of COVID-19 into tourism industry in general and on Egyptian tourism in particular.

2. LITERATURE REVIEW

This paper is based on an overview of the relevant literature on travel and tourism industry as well as hospitality service trends. To achieve purpose of this paper, first, the paper discusses the impact of COVID-19 as an international tourism disruption by investigating the circumstances of different tourism sectors affected by the pandemic. The paper continues by discussing the major impacts, behaviors and experiences of COVID-19 on selected tourism supply chain members in Egypt. Then, the paper provides a rapid assessment of the reported procedures of the three major tourism stakeholders in Egyptian tourism (namely tourism demand, supply and government and policy makers) during three COVID-19 mitigation stages (response, recovery and restart) through to the end of March 2020. Finally summarizing the early resilient practices to the tourism industry over 2020 and beyond.

2.1. COVID 19 as an international tourism disruption

Research investigating the COVID-19 tourism impacts is important in order to draft, eliminate 'casualties', monitor and improve response strategies (i.e. you cannot manage what you cannot measure) (Sigala, 2020). COVID 19 could be categorized as a combination of a natural disaster, a socio-political, economic and a tourism demand crisis (Zenker and Kock, 2020). Event categorization might be helpful to understand and derive conclusions from previous research. Not all aspects of Covid-19 are novel to us: Tourism studies on SARS, the bird-flu, Ebola and influenza pandemics show comparable patterns on smaller scales (Gössling, Scott and Hall, 2020; Zenker and Kock, 2020). Also, there are similarities between coronavirus-induced economic crisis and 2008 economic crisis, and between The political aspect of the coronavirus pandemic and tourism research during the Arabic Spring uprising and the refugee-crisis (Brown *et al.*, 2017; Rights, 2017; Pappas, 2018).

COVID-19 tourism impacts are uneven in time and space, early estimates show an enormous and international economic impact: international tourist arrivals are estimated to drop to 78% causing a loss of US\$ 1.2 trillion in export revenues from tourism and 120 million direct tourism job cuts representing seven times the impact of September 11, and the largest decline in the history (UNWTO, 2020). The last time the global tourism economy contracted was immediately following the financial crisis in 2008 when international arrivals decreased by 3.9%. Travel restrictions as well as business closure across many countries of the world have left many people unemployed. These economic consequences are expected to vary across countries, depending on the spread and intensity of the pandemic and associated government responses (Abay, Tafere and Woldemichael, 2020). The World Travel and Tourism Council (WTTC), meanwhile, forecast on 24 April that 100.8 million jobs are at risk globally. An ILO sectoral policy brief has identified tourism as one of the most vulnerable sectors that is extremely likely to witness a drastic fall in jobs as a result of the COVID-19 crisis (International Labour Organization, 2020)(*OECD Tourism Trends and Policies*, 2020)

Within countries, the virus affected virtually all parts of the hospitality value chain. The impact of cancelled events, closed accommodations, and shut down attractions became immediately felt in other parts of the supply chain, such as catering, laundry services and restaurants. In addition to, all the sectors on which tourism has important multiplier effects, including civil aviation, handicrafts, and food and beverage provision, have been profoundly affected (Era and Rosario, 2020; Jiang and Wen, 2020). In some sectors, the impact is expected to be as follows:

- Airlines: The International Air Transport Association (IATA) has published an analysis reporting that airlines may lose around 55 billion euros in bookings up to 30 June 2020, with a net quarterly loss of 35.4 billion euros. This situation is mainly due to the 38% drop in demand compared to 2019 and the drop in passenger revenue, which falls 229 billion euros (IATA, 2020).
- Cruise Industry: According to the Bloomberg agency, the three largest cruise operators have lost more than half of their market value in less than two months, equivalent to more than \$42 billion.
- Hotels: Globally, hotels have reported having extremely low occupancy rates, or have experienced closures on a massive scale. Big hotel chains have seen their stock price plunge as a result. For example, in February 2020, revenue-per- available-room (RevPAR) at Marriott hotels fell by nearly 90% in Greater China and declined by 25% in other parts of the Asia-Pacific region compared with the same period last year. In Europe it was estimated

that 76% of hotels were closed. According to STR, in the first week of May many countries had an average occupancy rate lower than 30%. It is predicted that RevPAR in the U.S., Europe, and Asia will continue to decline as leisure and business travel is delayed or cancelled due to fear of COVID-19.

2.2. Tourism in Egypt

Tourism is a major sector in Egypt with strong linkages to many parts of the economy (BMI, 2018). In 2018/19, revenues from tourism contributed USD 12.6 billion (4.2 percent of GDP) to the Egyptian economy (CBE, 2020). In 2018, total revenue from tourism reached EGP 174.1 billion, a 124% increase from the previous year, representing 15% of the country's GDP. The tourism sector is one of the largest employers in Egypt, providing 3.1 million jobs or 9.5% of the total workforce (World Travel and Tourism Council, 2018)

In 2018, Egypt recorded 9.8 million international arrivals, an increase of 48% compared to the previous year. The majority of international tourist arrivals were from European countries (59%), with most arrivals from Germany, Ukraine and the United Kingdom, the Middle East (22%), with most arrivals from Saudi Arabia and Jordan and African countries (7%), with Sudan being the key market. The average stay in 2018 was 10.8 nights, up from 7.9 nights the previous year (BMI, 2018). According to the Organisation for Economic Co-operation and Development (OECD) (2020) tourism budget of Egypt for the 2018/19 fiscal year is EGP 1.8 billion, up from EGP 1.6 billion the previous year. About half of tourism expenditure is on accommodation and in the food and beverages sectors, including restaurants; a third is for transportation; while the rest is spent on other expenses, such as museums and monuments and buying handicrafts. At the beginning of the year 2020, the UN World Tourism Organization (UNWTO) reported that Egypt's tourism sector had flourished in 2019, recording a 21% jump in growth, with more than 13.5 million tourists. Egypt even topped several "best tourist destination" lists for 2020, including one by the US business magazine *Forbes* (Lewis Sanders IV, 2020)

As in other countries, tourism has always been subject to periodic downturns. Egyptian tourism has been exposed to a wide range of crises in the past (Figure 2). Between 2000 and 2017, major disruptive events include the September 11 terrorist attacks (2001), the severe acute respiratory syndrome (SARS) outbreak (2003), the global economic crisis in 2008/2009, The Arab Spring revolution (2011), the Middle East Respiratory Syndrome (MERS) outbreak and the crash of the Russian plane (2015), EgyptAir MS804 crash into the Mediterranean (2016). The following figure 3 shows the impact of crisis events on Egyptian tourism.

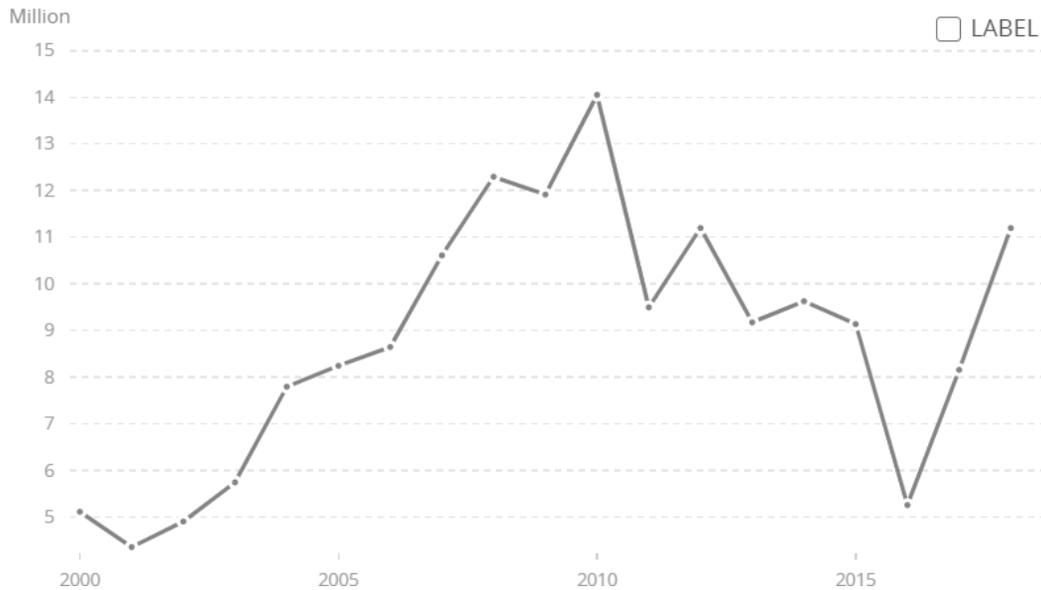


Figure 1: Impact of major crisis events on Egyptian tourism (World Bank, 2020)

2.3. COVID-19 and the Egyptian tourism industry

The first official case of COVID-19 in Egypt was reported on 14 February during a Nile cruise. The confirmed case of an American tourist aboard the cruise led to others also being confirmed as COVID-19 positive. The first death linked to the virus was a German tourist who had already travelled from Luxor to Hurghada; a popular coastal destination for Europeans (Tuite *et al.*, 2020). In March 2020, with COVID-19 beginning to spread in Europe, tourism declined sharply in Egypt between 70 and 80 percent of hotel bookings being cancelled (Abay, Tafere and Woldemichael, 2020; ECES, 2020). The situation continues to worsen as international travel has been further restricted around the world. Such reduction is more pronounced immediately after the government of Egypt closed hotels, restaurants, and nightclubs on 18 March (ECES, 2020). Figure 2 shows the declined share of tourism as percentage of GDP, in total exports and the absent share of international guests

Country	Tourism as % of GDP	Tourism as % in total exports	Share of international guests
Jordan	12 %	72 %	72 %
Egypt	4 %	25 %	
Qatar	4 %	15 %	
Oman	3 %	6 %	
Saudi Arabia	2 %	5 %	26 %

Figure 2: Tourism (direct) as share of GDP (UNWTO, 2020)

According to Tourism and Antiquities Minister, Khaled el-Anani, Egypt was looking to lose approximately US\$1 billion every month due to travel restrictions in and out of the country (News, 2020). Total-lockdown and curfews in some cities such as Luxor have created a

risky business climate for those who venture in hospitality and tourism, like, restaurants, cafes, bars and other businesses dependent on guests remain closed, including those that offer Nile cruise expeditions and travel packages. The following tables 1 shows the impact of COVID-19 on selected tourism supply chain (TSC) members.

Table 1: Impact of COVID-19 on selected tourism Supply Chain members

SC member	Effect
<i>Accommodation</i>	<ul style="list-style-type: none"> • 70 and 80 percent of hotel bookings being cancelled (Abay, Tafere and Woldemichael, 2020;ECES, 2020). • The government has cleared all hotels according to the recommendations of the World Health Organization • Shared accommodation in many regions are paused. • Refunds cancelled reservations
<i>Transportation</i>	<ul style="list-style-type: none"> • The government has grounded flights coming in and out of the country as it grapples with the global pandemic.
<i>Travel Agents and tour operators</i>	<ul style="list-style-type: none"> • Several Nile tour operators have COVID-19 infections (Tuite <i>et al.</i>, 2020) • Egyptian authorities on Thursday ordered to oblige travel agencies organizing Umrah pilgrimage or visits to the Prophet's Mosque refund fees of bookings to their customers. • Online travel agencies and online booking platforms are also being hit by the crisis due to the significant slowdown in transactions.(Abay, Tafere and Woldemichael, 2020)
<i>Restaurants and food supply</i>	<ul style="list-style-type: none"> • Food and catering service providers had initially been required to increase social spacing in eating establishments, limit their activity to delivery only in some instances, or entirely shut down activities. • Restaurants and coffee shops closes from 7 p.m. to 6 a.m. daily until March 31 to combat the spread of the virus.
<i>Tourism business (touristic sites, shopping centers, craft producers)</i>	<ul style="list-style-type: none"> • Government cleared all tourist areas and closed touristic sites. • Museums and cultural event organisers are facing huge financial losses as facilities shut down, and events have been cancelled. • Cancellation of major events including Luxor African film festival

It is widely accepted that crisis management needs to be implemented before, during and after a crisis. Table 2 provides some flash information on tourism-specific initiatives introduced by Egypt to respond to the COVID-19 crisis. The table provides an overview of the implications and impacts of COVID-19 on three major stakeholders (tourism demand, tourism operators, government and policy makers) under three stages representing the respond, recovery and restart stage from the pandemic to demonstrate a transformational stage envisioned in the post COVID-19 era.

Table 2: Impact of covid-19 on Egyptian tourism stakeholder

	Respond	Recover	Restart
Tourism Demand	<p>Tourists' affected by COVID-19 experiences</p> <ul style="list-style-type: none"> • Trip cancelations • Loss of money paid for travel-tourism • Trip disruptions • Loss of travel loyalty benefits and points • Quarantines and social distancing / lockdowns • Use of technology for crisis alerts and communication • Panic buying and stockpiling • Tour operators have reduced or halted operations • EgyptAir change reservation policy(MCA, 2020) • Restaurants focus their services on drive through or delivery offers • shopping centers and craft producers shifted to online shopping • (Lewis Sanders IV, 2020; MCA, 2020; Negida, 2020) 	<ul style="list-style-type: none"> • Excess use of technology (apps) for contactless services: Shopping, working and information updates • Multi-functional homes: remote working, virtual social behaviors: <ul style="list-style-type: none"> ○ Virtual entertainment ○ Virtual parties ○ Virtual events/festivals ○ Virtual dining ○ Virtual visitation of destinations and Attractions <p>Ensure Business Continuity</p> <ul style="list-style-type: none"> • Major archaeological sites slowly reopen with restrictions while monitoring the health of incoming visitors (Lewis Sanders IV, 2020) • Hotels receive local guests with a limit of a 25% occupancy • Hospitality establishments operate with a maximum of 50% of their total workforce • Trained and educated employees on symptoms and preventive measures of COVID-19. • Certified hotels and resorts located in coastal governorates receive inbound tourism with 	<p>Experiencing a new tourism service:</p> <ul style="list-style-type: none"> • digital health passport and Certifications • Digital identity apps • Travelers' mobility tracing apps • Crowd and social distancing technology solutions and restrictions • Contact free travellers' journey management solutions • New hygiene standards • Social distancing redefining service etiquettes. <p>Building Resilience</p> <ul style="list-style-type: none"> • Restoring traveler's confidence and stimulating demand with new safe and clean labels for the sector • Information apps for visitors and domestic tourism promotion campaigns.(OECD,2020) • EGYPTAIR has issued new options offering the flexibility to fly again till the end of the suspension period. • Aggressive pricing promotion, • Engaging customers through latest social media, targeting the younger segment (ECES, 2020; Hassany <i>et al.</i>, 2020; Lewis Sanders IV, 2020; OECD, 2020)

		<p>maximum occupancy rates of 50%.</p> <ul style="list-style-type: none"> • Tourist groups not exceed 25 people • Means of Transportation for Tourists (Bus, Limousine, Golf Cars) operating with a maximum of 50% capacity 	
Government and Policy Makers	<p>The priority is to ensure health, safety and security of all tourists as well as staff working in the tourism sector</p> <ul style="list-style-type: none"> • Unified effective communications and recommendations between Egyptian Ministries of Tourism and Antiquities, Health and Population, Civil Aviation, the Egyptian Tourism Federation together addressing strict instructions to the tourism industry • Crisis Management Committee is formed which involves all stakeholders from both public and private sectors. • Screening at airports included body temperature and clinical assessment and the use of a rapid diagnostic test (Hassany <i>et al.</i>, 2020) • Travelers arriving from countries declared by the (WHO) as severely infected with COVID- 19 are required to submit a recent PCR test result <p>Rent payments are suspended for tourism and food service businesses at state-controlled landmarks.(ILO, 2020)</p>	<ul style="list-style-type: none"> • Government has promoted a "coexistence plan" to maintain anti-coronavirus measures while resuming activities. • Inspecting hotels in resort cities • 10 - 15 visitors inside any pyramid or tomb (depending on its dimensions). • The Government extended an existing cash transfer program to cover 100,000 families. This program benefits informal workers, including many in the tourism sector. • Setting a hotline for tourism sector workers to register any infected case. • The Ministry of Tourism and Antiquities calls on citizens and tourism companies to restrict dealing to hotels that have obtained a health safety certificate, and not any others 	<ul style="list-style-type: none"> • Government has announced a stimulus package with 50 billion Egyptian pounds earmarked for the tourism industry. It aims to keep hotels running during the crisis(ILO, 2020) • the introduction of a new initiative promoting travel to upper Egypt during summer months (June, July and August) by offering discounts on entry fees to archeological sites in Qena, Luxor and Aswan. • Reduction of visa fees upon arrival at Luxor and Aswan Airports. • Online campaign on websites and social media platforms under the title “Experience Egypt from Home”, posting virtual tours and guided tours inside some of Egypt’s museums and archeological sites every day at 8 pm. • The Egyptian Cabinet has approved on March 11, 2020 a number of measures facilitating travel to Egypt • Tourists arriving onboard Egypt Air and Air Cairo will enjoy a 20% discount on entry ticket prices to all archaeological sites and museums of the Supreme council of Antiquities. • The continuation of the aviation incentive program granted to airlines flying to the tourism destinations until October 2020 to strengthen market competitiveness and to promote inbound tourism from various source markets. • The President has requested the Central Bank of Egypt (CBE) to offer tourism facilities low-interest funds, particularly for payment of salaries of employees.

3. RESULTS AND DISCUSSION: COVID 19 AND TOURISM RESILIENCE PRACTICES

Resilience has emerged as an important concept in the tourism industry (Dahles & Susilowati, 2015). Resilience is a critical ability for a tourism system since crisis and disruptions, impact the image of a destination significantly and for longer periods of time. They affect the capacity of tourism destinations to adapt to changes and ‘bounce-back’ from crises (Reddy, Boyd and Nica, 2020).

The tourism sector is one of the most vulnerable industries caused by this pandemic with countries closing their borders, imposing travel bans from international visitors resulting in massive cancellation of flights.(Era and Rosario, 2020). Tourism is a significant part of many national economies, and the immediate and huge blow to the tourism sector resulting from the pandemic is affecting the wider economy. While tourism has been heavily impacted by the pandemic, and the measures put in place to contain the virus, tourism flows are also a potential vector for spreading the virus. While the delay in re-opening and continued uncertainty creates further challenges for the sector, moving too quickly risks further dampening government and consumer confidence in getting the sector up and running for the longer term. For this reason, opening up the sector is going to be more difficult than shutting it down, and will require a balanced measured approach.

Many countries are now entering a new phase in fighting the virus while at the same time managing the re-opening of the tourism economy. This is a complex and challenging task and quantifying the impact on the tourism economy is difficult. As governments around the world have introduced restrictions on travel, business operations and people-to-people interactions and the unprecedented measures to contain the virus, have brought the tourism economy to a standstill.

Recovery is now expected to start later and be slower than previously forecasted. Travel restrictions and containment measures are likely to be in place for longer, and are expected to be lifted only gradually, with the possibility of reversal should new waves occur(Donthu and Gustafsson, 2020). Even when TSC start to function again, businesses will be operating at restricted capacity due to new health protocols. Demand-side recovery will also take some time, while consumer confidence and travel behavior will be more deeply impacted the longer the pandemic goes on (OECD, 2020)

Tourism businesses are already preparing to improve health screening and hygiene measures which will need to be fully actionable by small and micro-businesses. Also, government has a role to play in working with peak national industry bodies to support these businesses. Businesses will also need to take steps to protect workers, who are at the front line in delivering tourism services. While, Governments have been quick to put in place policies to support SMEs and acknowledge the specific circumstances of them, with policy responses frequently followed this sequence of measures: health measures, measures to address liquidity by deferring payments, measures to supply extra credit to strengthen SME resilience, measures to avoid the consequences of unorganized lay-offs (Era and Rosario, 2020)

Domestic tourism is expected to play a significant role in leading the initial recovery phase, given the uncertain outlook for international travel. Countries where domestic tourism already represents a significant portion of the tourism economy are thus likely to see recovery in the sector more rapidly than countries that are heavily dependent on international tourism flows.(OECD, 2020)

Due to the COVID-19 outbreak, travelers will likely support hotels that offer reassuring

lodging services and accommodation products in terms of hygiene and cleanliness. To this end, hotels should implement regular hygiene surveillance at facilities via manual (i.e., staff rounds) and automated (e.g., robot-based) practices. Given that cleaning robots nowadays are endowed with sensors measuring the quantity of dust in a specific area of a hotel and either work more on that area or generate data that can be useful for the cleaning teams,(Jiang and Wen, 2020)

In Egypt, the expectation is that domestic tourism offers the main chance for driving recovery and supporting the tourism sector. Domestic tourism flows have also been heavily affected by restrictions on the movement of people but are expected to recover more quickly once control measures are lifted. The crisis presents an opportunity to rethink the tourism system in Egypt for a more sustainable and resilient future. Covid-19's response can become the catalyst for reinventing the supply chain in the tourism industry. The aim is to preserve those elements of the current struggle in the short term that can serve as a basis for a more reactive and flexible operation in the future.

4. CONCLUSION

Tourism is one of the most directly affected sectors in this current crisis and this calls for immediate and long-term responses. With international aviation at a virtual standstill since March, the closure of tourism sites and attractions, the cancellation or postponement of major festivals and events, and restrictions on public gatherings (indoor and outdoor) in many countries, the impact of COVID-19 on global tourism has been overwhelming and immediate. Tourism businesses were among the first to be shut down following the introduction of measures to contain the virus. Tourism activities are also likely to be among the last to restart, and on a phased basis. Even when these businesses do open, it will be under new operating procedures. The pandemic is also likely to have an impact on tourist behavior, impacting the resumption and recover of domestic and international tourism.

Furthermore, despite the sector's resilience in response to previous crises, the sheer depth and breadth of COVID-19-related impacts on tourism and economy means a quick recovery is unlikely. Reflecting the urgency of the situation, national efforts to mitigate the impact of the pandemic, are committing work together to provide support to support a sustainable and inclusive recovery of the tourism sector.

5. LIMITATIONS AND FUTURE RESEARCH

As the phenomenon being studied is ongoing, most of the references on Egyptian situation come from the mass media and not from scientific articles published in journals, because there are not yet a significant number of papers about the impact of coronavirus on global tourism in general and Egypt in particular. Future studies could extend this paper by empirically analyzing the effect of Covid-19 on tourism supply chain quantitatively or by conducting qualitative case studies with tourism and hospitality different supply chain partners in Egypt.

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