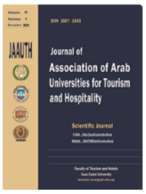

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THE FUTURE OF TOURISM POST COVID-19 PANDEMIC: FROM THE EGYPTIAN TOUR OPERATORS' PERSPECTIVES

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Abstract

The Covid-19 pandemic is the worst crisis the international tourism sector is facing, and UNWTO has revised its 2020 forecast. Full closure of borders led to a collapse in international tourism to Egypt with a loss in GDP and employment. UNWTO affirms that tourism will recover, but it won't be the same as before, which presents a gap to be filled. This paper aims to identify the changes in tourism industry components post COVID-19 pandemic as perceived by Egyptian Tour Operators. Survey data using questionnaires were collected from 373 employees. The results show that tourism will be more domestic, face mask and social distancing will become the new norm, tourist will choose hotels with an effective hygiene system, and health-check will be a must to enter airports and airplanes, which present a significant contribution to the understanding of the future of the tourism industry by policymakers, stakeholders and tourism researchers.

1. Introduction

The tourism industry is subject to a wide range of events that may happen at a specific destination, or neighbor destinations, or maybe in areas remote from either or both (Prideaux et al., 2003). In that context, international tourism demand is susceptible to security and health issues (Blake and Sinclair, 2003; Blake et al., 2003). On December 31, 2019, the WHO (World Health Organization) office in China had been informed about 41 patients with confirmed infections by COVID-19 in Wuhan city. Although the Chinese city had been put in lockdown, the global transportation had already carried the new virus to the rest of the world (Anderson et al., 2020; Huang et al., 2020). According to WHO update on May 25, 2020, the Coronavirus disease (COVID-19) outbreak's global situation showed 5,304,772 confirmed cases, 342,029 confirmed deaths, and 216 countries, areas, or territories with cases (WHO, 2020b).

Currently, tourism is one of the most affected sectors in the globe, and UNWTO has revised its 2020 forecast for international arrivals. The danger of falling into a deflationary trap cannot be dismissed for many important economies (UNWTO, 2020b).

UNWTO Secretary-General Zurab Pololikashvili said: "The World is facing an unprecedented health and economic crisis. Tourism has been hit hard, with millions of jobs at risk in one of the most labor-intensive sectors of the economy" (UNWTO, 2020e). The global economic impacts of the Covid-19 crisis are increasingly hitting low- and middle-income countries. The full or partial closure of businesses and international travel restrictions in Europe, North America, and Asia, have led to an unprecedented breakdown in international travel and are expected to reduce the flows of tourism remittances, which are relevant sources of employment and incomes for the poor (Breisinger et al., 2020).

Significant challenges remain ahead due to the indefinite duration of the Covid-19 pandemic, the international travel restrictions, and ensuing global economic stagnation. Countries are implementing a broad range of measures to alleviate the impact of the COVID-19 outbreak and to support the recovery of the tourism industry (UNWTO, 2020b). Hopefully, there will be new health safety protocols, which may be forthcoming. The digital identity and biometrics technologies have the potential to ensure trust for traveling again, and the government and tourism stakeholders need to plan tourism recovery in context with this new situation. Eventually, they will need to adapt to changing traveler behavior (WEF, 2020b).

The UNWTO Panel of Experts affirm that tourism has the potential to recover again and to establish itself as a key economic benefactor, and to promote sustainability at all levels. They emphasize that people will travel again, but it will not be the same as before the Corona pandemic (UNWTO, 2020d).

This paper aims to identify the changes in tourism industry components and expectations for the international tourism demand for Egypt post COVID-19 pandemic as perceived by the Egyptian Tour Operators by measuring their attitudes towards forthcoming changes. The findings may be a useful contribution to both policymakers, stakeholders, as well as to the tourism literature.

2. Literature Review

2.1. Tourism and Global Crises

Global tourism has faced many crises over the past two decades; starting with the September 11 terrorist attacks against the United States in 2001, then the acute respiratory syndrome (SARS) outbreak in 2003 affecting China, Canada, Mongolia, Philippines, Singapore, and Vietnam (WHO, 2020a). These crises got intermixed with the global economic crisis, which put the major industrial economies in a deep recession in 2008 and 2009 (UNWTO and ILO, 2013). Then came the Middle East Respiratory Syndrome (MERS) outbreak, which was reported first in Jordan and Saudi Arabia in 2012, and later the largest known outbreak of MERS in the Republic of Korea in 2015, which was linked with a tourist returning from the Arabian Peninsula (WHO, 2019 and CDC, 2020).

Although these crises affected international tourist arrivals, none of them caused a long-term decline in tourist arrivals. They had a slight effect, and the rate of decline did not exceed 0.4% at worst during the SARS crisis and the global economic crisis (World Bank, 2020), Then the tourism industry enjoyed ten years of continuous growth 2010-2019 (UNWTO, 2020a) as shown in Figure 1.

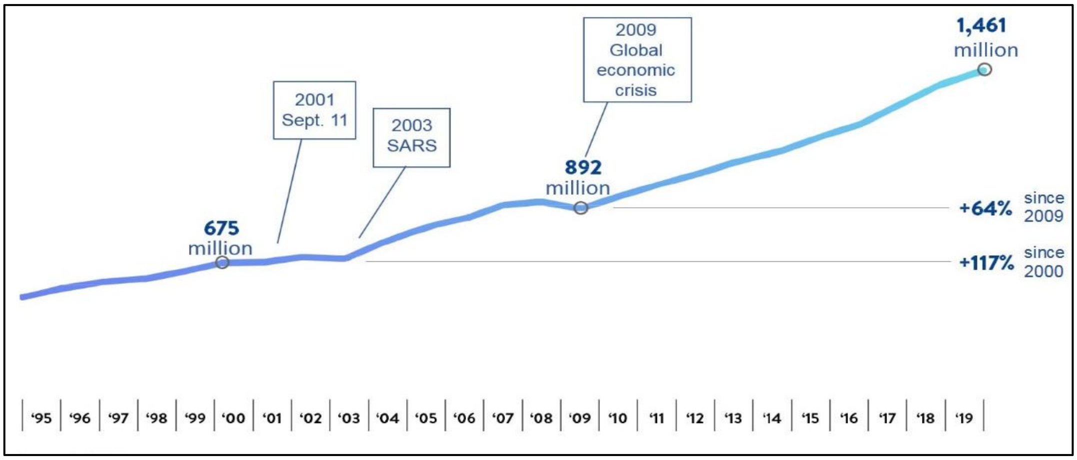

Figure.1. International Tourist Arrivals 1995-2019. Source: UNWTO, 2020a.

2.2. The Impact of COVID-19 on Tourism Industry

The UNWTO announced that Coronavirus (COVID-19) brought the worst crisis the tourism industry is facing and a tremendous blow to the tourism industry ever. It is among the most affected businesses with grounded airplanes, closed hotels, and unprecedented travel restrictions in practically all countries. The available data indicates a double-digit decrease of 22% in the first quarter of 2020, with tourist arrivals in March down by 57%. This translates tourism industry losses to 67 million international tourist arrivals and about USD 80 billion in receipts (UNWTO, 2020b).

The unprecedented COVID-19 pandemic blow to the tourism industry caused a high level of uncertainty, which led to the downgraded expectations for the tourism industry for the rest of the year 2020. UNWTO expects a decline of 58 to 78% in international tourist arrivals, until the end of 2020. This expectation is based on three possible scenarios: travel restrictions to be lifted and expectation that the national borders will open in early July (First Scenario: -58%), in early September (Second Scenario: -70%) or in early December (Third Scenario: -78%) (UNWTO, 2020b) Figure (2).

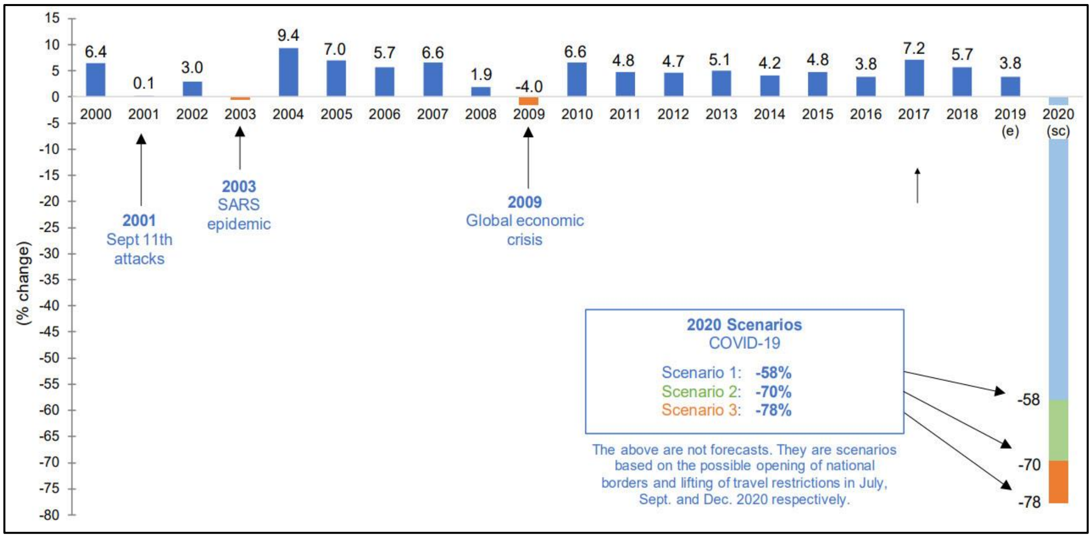

Figure.2. Scenarios of the impact of COVID-19 on International Tourist Arrivals till Dec 2020. Source: UNWTO, 2020b.

The latest projections show that the Coronavirus (COVID-19) will affect scheduled passenger traffic globally for 2020, with a decrease in seats offered by airlines by 32% to 59%. Compared to the originally planned baseline, the number of passengers will decrease by 1,815 to 3,213 million passengers and around USD 236 to 419 billion losses to the gross operating revenues of airlines. The overall air passenger traffic (international and domestic) in 2020 will amount to a reduction ranging from 35% to 65% compared to 2019 (ICAO, 2020).

The COVID-19 pandemic will cause unprecedented projected losses for the travel and tourism industry for 2020, with 100.8 million jobs (-31%), compared to 330 million jobs in 2019. The travel and tourism GDP in 2020 is predicted to decline to 2.7 trillion USD (-30%), compared to USD 8.9 trillion in 2019 (WTTC and Oxford Economics, 2020). Historically, by far, these are the worst figures for the international travel and tourism industry since 1950, which will put an unexpected end to tourisms' 10-year period of sustained growth since the 2009 financial crisis (UNWTO, 2020b).

2.3. Egypt Tourism Industry and COVID-19

The tourism industry constitutes one of the leading economic sectors in Egypt, which contributes 9.3% to national GDP. Also, the travel and tourism industry provides 2.49 million jobs, which represents 9.7% of the total employment in Egypt (WTTC,2020). The COVID-19 pandemic impacts the tourism industry in Egypt as all other countries over the world. The full closure of borders led to a collapse of the international travel and tourism to Egypt; the estimated losses in national GDP may reach 0.8% per month. The absence of tourists will cause monthly losses of USD 1.5 billion (Breisinger et al., 2020), while the governmental estimation for the loss is around USD 1 billion per month of income from tourism, which contributes to 12% of the national GDP.Also, 138,000 jobs in tourism are at risk. The negative impacts of the crisis are expected to impact further to at least 2.49 million people employed by the tourism industry, which represents around 10% of the total employment, the third-largest sector in Egypt (OECD, 2020; WTTC,2020).

2.4. Tourism Industry Post COVID-19 Pandemic

Sooner or later, countries will ease travel restrictions to enable tourism to restart and let economies move up; however, the main question is how and when the international borders will reopen and how tourism activities would resume. Some countries have already discussed and established "Travel Bubbles," whereby countries with a low rate of coronavirus infection will allow their citizens to enter freely among the group of countries. In contrast, quarantine restrictions will be imposed on those out of the bubble (WEF, 2020a).

The UNWTO created the Global Tourism Crisis Committee to advise the tourism sector as it responds to the crisis of the COVID-19 pandemic and to build the basis for future resilience and sustainable growth. Besides, the World Tourism Organization (UNWTO), this committee includes representation from the World Health Organization (WHO), International Maritime Organization (IMO), the International Civil Aviation Organization (ICAO), International Air Transport Association (IATA), Airports Council International (ACI), World Travel and Tourism Council (WTTC), and Cruise Lines International Association (CLIA) thereby ensuring representation of all vested parties

(UNWTO, 2020c). This committee announced a list of recommendations aimed at supporting governments, the private sectors in the tourism industry, and host communities to face unparalleled social and economic emergencies such as COVID-19 pandemic (UNWTO, 2020d).

The World Economic Forum rightly predicted that traveling post-pandemic crisis would be entirely different than before it. Most conspicuous will be a shift towards touchless traveling, and new health safety regimes sustained by digital techniques such as the "Known Traveller Digital Identity" initiative (WEF, 2020b).

3. Methodology

3.1. Population and Sample Size

According to the Egyptian Travel Agents Association, there are 2,283 travel agencies listed in the travel agent's directory (ETAA, 2020). The average number of employees at each agency is five, so the assumed population for this research is 11,415 members. To estimate the sample size for this research, the Stephen Sampson Equation was used.

$$n = \frac{N\ x\ p(1-p)}{[[N-1\ x\ (d^2 \div z^2)] + p(1-p)]}$$

Where, "n" is sample size; "N" is population size; "Z" is confidence level at 95% (standard value of 1.96); "E" is error proportion =0.05; and "p" is the probability (30% – 60%) or = 50%. The resultant minimum sample size for this study is 372.

3.2. Data collection

Secondary data were collected from the official reports and websites of the international organizations such as UNWTO, WHO, ICAO, OECD, WTTC, WEF, and World Bank, to ensure the reliability of the data. A close-ended questionnaire was used to collect primary data. A random sample method was employed to collect data from Egyptian tour operators, A pre-tested questionnaire was sent by e-mail to the sample population. A total of 390 questionnaires were sent out of which three hundred and seventy-nine questionnaires were received. Six surveys were excluded due to incompleteness, so the actual number of the usable questionnaires was 373, with a response rate of 96%. Authors got a high response rate due to their good relationship with many tour operators. The respondents were asked to identify the changes in tourism industry components post COVID-19 pandemic on a five-point Likert scale, where one indicated strongly disagree, and five refers to strongly agree. The classification of Cooper (2008) for tourism market components was used as a base for framing the questions, covering tourists, hotels (accommodation and food and beverage services), tour operators (travel packages, tours, events, transportation), Airlines/Airports (international transportation services).

The questionnaire consisted of six closed-ended questions, the first and second questions were MCQ type, the respondents were asked about their predicted date for tourism demand recovery to Egypt post COVID-19 pandemic and possible recovery date for demand from international markets. The other four questions were Likert scale type. Respondents were asked to identify how much they agree or disagree with particular statements about possible changes that may occur in tourism industry components post COVID-19 pandemic: Tourists (10 statements), Hotels (15 statements), Tour Operators/Travel Agencies (11 statements), and Airlines/Airports (10 statements).

3.3. Analytical Techniques

Data were analyzed using the statistical package SPSS, version 17 and Excel Spread Sheet in Office 2007, to measure the attitudes of Egyptian tour operators relating to the extent to which they agree or disagree with possible changes in the tourism industry post-COVID-19 pandemic, and assessing the cognitive and affective components of attitudes, by measuring the frequencies, percentages, means, standard deviation, and weighted means.

4. Results and Discussions

4.1. The expectation of Tourism Demand Recovery to Egypt

The respondents were asked to determine the expected date by which tourism demand to Egypt will recover post-COVID-19 pandemic selecting from five different periods, as shown in Figure 3.

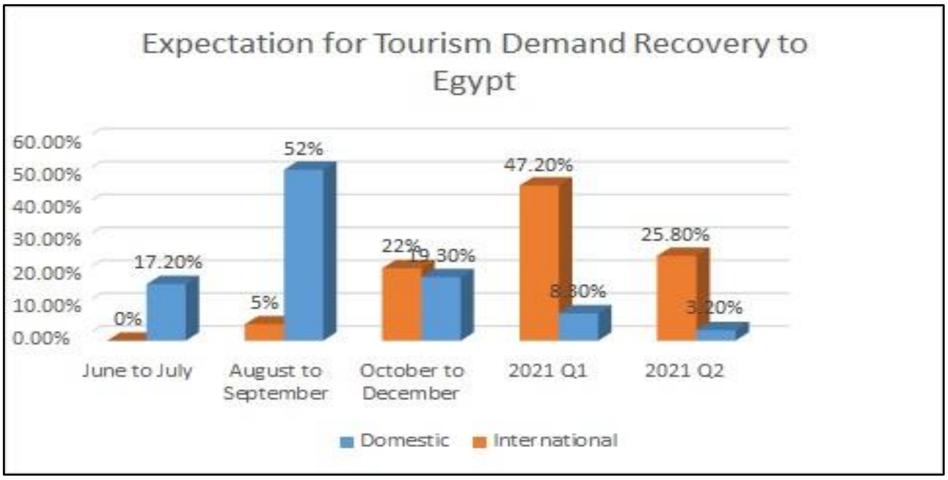

Figure.3. The expectation of Tourism Demand Recovery to Egypt.

As seen in Figure 3, the domestic tourism demand is expected to recover faster than the international demand, as the majority of respondents (52%) anticipated that domestic tourism in Egypt would improve between August to September period, followed by 17.2% of the respondents predicting improvement between June to July 2020 period. Their expectations for international tourism demand recovery to Egypt will extend to the first quarter of 2021 (Q1 2021) by 47.2%, followed by 22% of respondents, anticipating international tourism demand recovery from October to December 2020 period.

4.2. The expectation of Tourism Demand Recovery to Egypt by Market

The respondents were asked to determine their anticipations for the recovery date of tourism demand from each international market to Egypt. They were asked to choose the expected period of recovery from five different periods for each of the five international tourism markets, as shown in Figure 4.

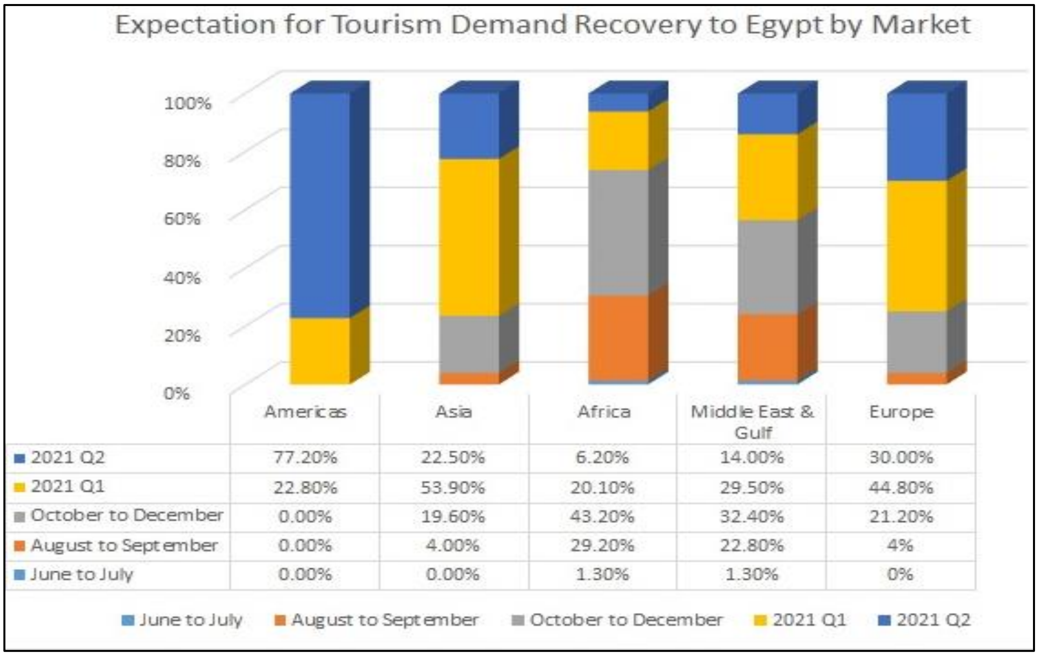

Figure.4. The expectation of Tourism Demand Recovery to Egypt by Market.

Figure 4 shows the expectations as expressed by the Egyptian tour operators for the recovery date of tourism demand for each of the international markets to Egypt. The majority of the respondents (77.2%) expected that Americas' Market (North and South) would recover during the second quarter of 2021 (Q2 2021). For the Asia Market, the majority of respondents (53.9%) anticipated that the demand would recover during the first quarter of 2021 (Q1 2021). While for Africa, the majority of respondents (43.2%) expected that the market would recover during the fourth quarter of 2020 (Q4 2020-October to December period). On the other hand, expectations for the Middle East and Gulf Markets were a little different, as the respondents' expectations differed in determining the expected period for the recovery. Their responses were in close proportions between the categories of the periods, with 32.4% selecting "October to December period - Q4 2020", while 29.5% anticipated recovery during the first quarter of 2021 (Q1 2021), and 22.8% expected that recovery would be during August to September period. For Europe Market, the majority of respondents (44.8%) expected that recovery would be during the first quarter of 2021 (Q1 2021).

4.3. Tourists' Behavior

To identify changes in tourists' behavior, and to measure the attitudes of Egyptian tour operators in terms of the extent to which they agree with changes in tourists' behavior post-COVID-19 pandemic, respondents were asked to rank their points of view towards ten different statements. The statements enquired what changes, if any, are expected in tourists' behavior post-COVID-19 pandemic, on a 5-point Likert scale, starting with strongly disagree as "1" to "5" as strongly agree." The results are presented in Table 1.

Table 1
Descriptive Statistics for Changes in Tourists' Behavior

Statements	No	Mini.*	Max.*	Mean	Std Deviation	Rank
1. Will book with known and trustworthy brands.	373	3	5	4.473	0.578	1
2. Will choose hotels that apply a strong hygiene system.	373	3	5	4.473	0.578	1
3. Will search for smaller properties that are centrally located.	373	1	4	2.923	0.652	7
4. Will spend less time on public transportation.	373	2	5	3.655	0.823	6
5. Will search for hotels that offer minimum touchpoints.	373	3	5	4.422	0.771	2
6. Will look to rent out private homes, bungalows, and villas.	373	1	4	2.923	0.652	7
7. Tourists will travel to nature instead of cities.	373	3	5	4.155	0.578	4
8. Less movement and stay longer in each destination.	373	2	5	4.188	0.652	3
9. Feeling safe before going on a trip will be a new norm after COVID-19.	373	2	5	3.933	0.909	5
10. For economic reasons, after the pandemic subsides, people are likely to be interested in low-cost travel.	373	1	4	2.923	0.652	7
Tourists' Behavior Weighted Mean				3.88		
Std. Deviation					0.682	

(*) Likert Scale (1 to 5), Starting with "1" = Strongly disagree to "5" = Strongly agree.

Table 1 shows descriptive statistics for changes in tourists' behavior post-COVID-19 pandemic as perceived by the Egyptian tour operators. Evidently, the highest average was for statements 1 and 2, "Will book with known and trustworthy brands," and "Will choose hotels which apply a strong hygiene system" with a mean of 4.473 and standard deviation of 0.578, The first two were followed by statement 5 "Will search for hotels that offer minimum touchpoints" with mean and standard deviation of 4.422 and 0.771 respectively. While the lowest average was for the statements 3 and 10, "Will search for smaller properties that are centrally located" and "For economic reasons, after the pandemic subsides, people are likely to be interested in low-cost travel" with mean of 2.923 and standard deviation of 0.652. The weighted average of changes in tourists' behavior was 3.88, with a standard deviation of 0.682, which indicates that the changes in tourists' behavior is in agreement as a general trend. This conclusion is based on the fact that 3.88 lies within the interval (3.40-5.00 according to a 5-point Likert scale, as shown in table 1. This value (3.88) is considered as a high level, according to the intervals of other levels: [Low level 1 – 2.59; Moderate Level 2.60 – 3.39; High level 3.40 – 5].

4.4. Hotels

To identify predicted post-COVID-19 pandemic changes in accommodation, food, and beverage services, the respondents were asked to rank their expectations. For this assessment, a 5-point Likert scale, with "1" as strongly disagree, and "5" as strongly agree, was used for responses to 15 different statements that explain possible changes as shown in Table 2.

Table 2

Descriptive Statistics for Changes in Accommodation, Food and Beverage Services

Statements	No	Mini.*	Max.*	Mean	Std Deviation	Rank
1. No more long lines at check-in and check-out.	373	3	5	4.655	0.578	1
2. Rooms' key cards should become a thing of the past.	373	3	5	4.244	0.567	3
3. No chance for crowded buffets.	373	3	5	4.655	0.578	1
4. High demand for boutique properties that are away from crowded cities.	373	2	5	3.933	0.823	6
5. Hotels should value sustainability, take care of its workers, and give back to its local community.	373	1	5	3.422	0.909	8
6. Hotels should offer wellness features that go beyond spa treatments.	373	2	4	2.946	0.628	10
7. Hotel chains will minimize spending money on business travel to attend conferences and tourism fairs.	373	2	4	3.163	0.578	9
8. Hotel management should provide hand sanitizer daily at rooms.	373	2	5	4.473	0.597	2
9. A digital thermometer is recommended in a hotel room to help guests to identify a fever and seek medical care when needed.	373	3	5	4.155	0.771	4
10. Luxury hotels may come cheaper.	373	3	5	4.146	0.567	5
11. Nile Cruises may be stopped for a while.	373	3	5	4.155	0.796	4
12. Hotels are likely to be more flexible towards postponements, cancellation, early check-ins, late check-outs, and special requests.	373	2	4	3.689	0.652	7
13. Hotels should adapt to offer 100% online and contactless payment options to tourists and locals.	373	2	5	4.244	0.578	3
14. The social distancing will become the new norm inside hotels and restaurants.	373	2	5	4.655	0.578	1
15. Face mask will be applied everywhere.	373	3	5	4.655	0.578	1
Hotels' Services Weighted Mean				4.079		
Std. Deviation					0.673	

(*) Likert Scale (1 to 5), Starting with "1" = Strongly disagree to "5" = Strongly agree.

Table 2 shows descriptive statistics for changes in accommodation, food and beverage services post COVID-19 pandemic as perceived by Egyptian tour operators, for which the highest averages were found for statements 1; 3; 14 and 15, "No more long lines at check-in and check-out"; "No chance for crowded buffets"; "The social distancing will become the new norm inside hotels and restaurants"; and "Face mask will be applied everywhere," with mean of 4.655 and standard deviation of 0.578, followed by statement 8 "Hotel management should provide hand sanitizer daily in rooms" with a mean of 4.473

and standard deviation of 0.597. While the lowest average was found for statement 6, "Hotels should offer wellness features that go beyond spa treatments" with a mean of 2.946 and standard deviation of 0.628.

The weighted average of Hotels' Services was 4.079 with standard deviation of 0.673, which indicate an expected changes in accommodation, food and beverage services as a general trend as measured by a 5-point Likert scale as shown in table 2, since 4.079 lies within the interval (3.40-5), which is considered a high level, according to the intervals of the level.

4.5. Tour Operators/Travel Agencies:

To identify changes in tour operators' services, and to measure the attitudes of Egyptian tour operators in terms of the extent to which they agree with changes in tour operators' services post COVID-19 pandemic a set of statements were used. Respondents were asked to rank their point of view towards 11 different statements that explain the changes that may occur in tour operators' services on a 5-point Likert scale, starting with strongly disagree "1" to strongly agree "5."

Table 3

Descriptive Statistics for Changes in Tour Operators' Services

Statements	No	Mini.*	Max.*	Mean	Std Deviation	Rank
1. Travel packages should shift towards more conscious travel.	373	3	5	4.244	0.567	2
2. Tours should be more sensitive and responsible for the environment and community.	373	3	5	4.244	0.567	2
3. Use of a plexiglass barrier that completely separates the driver.	373	3	5	4.473	0.597	1
4. A mandatory travel insurance that includes COVID-19, will be required.	373	3	5	4.473	0.597	1
5. Tour operators will minimize spending money on business travel to attend conferences and tourism fairs.	373	1	4	2.933	0.909	7
6. The meeting that is not necessary face to face will be replaced by technology such as video conferencing.	373	2	4	3.244	0.567	6
7. Travel budget for MICE trips will be reduced, and companies will depend on online meetings.	373	3	5	4.155	0.578	4
8. Mega events will become less attractive.	373	3	5	4.188	0.578	3
9. Tourism will be more domestic directed.	373	3	5	4.473	0.597	1
10. Tour Operator should adapt to offer 100% online and contactless payment options to tourists and locals.	373	2	4	3.689	0.652	5
11. Face mask will be a must during tours and inside museums.	373	3	5	4.473	0.597	1
Tour Operators' Services Weighted Mean				4.053		
Std. Deviation					0.613	

(*) Likert Scale (1 to 5), Starting with "1" = Strongly disagree to "5" = Strongly agree.

Table 3 shows descriptive statistics for changes post-COVID-19 pandemic as perceived by Egyptian tour operators. The highest averages were found for statements 3; 4; 9 and 11, which state "Use of a plexiglass barrier that completely separates the driver'; "A mandatory travel insurance that includes COVID-19, will be required"; "Tourism will be more domestic directed"; and "Face mask will be a must during tours and inside museums," with a mean of 4.473 and a standard deviation of 0.597. The averages for statements 1 and 2 "Travel packages should shift towards more conscious travel" and "Tours should be more sensitive and responsible towards environment and community," followed with a mean of 4.244 and standard deviation of 0.567. The lowest recorded average was for statement 5, "Tour operators will minimize spending on business travel to attend conferences and tourism fairs" with the mean of 2.933 and the standard deviation of 0.909.

The weighted average of tour operators' services was 4.053, with a standard deviation of 0.613, which indicates that the changes in tour operators services are in agreement, as a general trend. Based on the 5-point Likert scale, 4.053 lies within the interval (3.40-5), which is considered as a high level, according to the intervals of the levels.

4.6. Airlines and Airports

To identify possible changes in airlines' and airports' services, and to measure the attitudes of Egyptian tour operators in terms of the extent to which they agree with changes in the post-COVID-19 pandemic, respondents were asked to rank their points of view. Ten different statements that explain the changes that may occur to airlines' and airports' services post- COVID-19 pandemic were used using a 5-point Likert scale, with strongly disagree as "1" and strongly agree as"5".

Table 4

Descriptive Statistics for Changes in Airlines and Airports' Services

Statements	No	Mini.*	Max.*	Mean	Std Deviation	Rank
12. Passengers have to wear a face mask or cloth mask in order to enter the airplane.	373	3	5	4.655	0.578	1
13. Passengers should provide additional documentation regarding their personal health before flying and entering a country.	373	3	5	4.655	0.578	1
14. Air travel will become more expensive.	373	2	4	3.689	0.771	5
15. Health-checks may get added to check-in routines, enhancing the wait at airports.	373	3	5	4.655	0.578	1
16. Airlines are likely to be more flexible towards postponements, cancellation, and special requests.	373	3	5	4.244	0.567	3
17. If the virus remains active, and the COVID-19 vaccine is developed, travelers should be required to be vaccinated in the future.	373	3	5	4.473	0.578	2
18. The social distancing will become the new norm at airports and onboard airplanes.	373	3	5	4.655	0.578	1
19. Face mask will be applied everywhere inside airports.	373	3	5	4.655	0.578	1

continued

20. Cashless travel will look more appealing.	373	2	5	4.155	0.652	4
21. Digital health passports may be required.	373	2	5	4.244	0.567	3
Airlines and Airports' Services Weighted Mean				4.408		
Std. Deviation					0.602	

(*) Likert Scale (1 to 5), Starting with "1" = Strongly disagree to "5" = Strongly agree.

Table 4 shows descriptive statistics for changes in airlines' and airports' services post- COVID-19 pandemic as perceived by the Egyptian tour operators. The highest averages were found for statements 1; 2; 4; 7 and 8, "Passengers have to wear a face mask or cloth mask to enter airplane"; "Passengers should provide additional documentation regarding their personal health before flying and entering a country"; "Health-checks may get added to check-in routines, enhancing the wait at airports"; "The social distancing will become the new norm at airports and onboard airplanes"; and "Face mask will be applied everywhere inside airports," with a mean of 4.655 and a standard deviation of 0.578. While the lowest average was found for statement 3, "Air travel will become more expensive" with a mean of 3.689 and a standard deviation of 0.771, which is also near the level of "agreement," even with the lowest average of choices by tour operators.

The weighted average of expectations in Airlines' and Airports' services changes was 4.408, with a standard deviation of 0.602, which is the highest between all tourism industry components under study. It is indicative of expected trends in airlines and airports' services. As shown in table 4, there is agreement since 4.408 lies within the interval (3.40-5), on a 5-point Likert scale, it is considered as a high level, according to the intervals of the level.

5. Conclusion

Coronavirus pandemic is the worst crisis the tourism industry is facing after enjoying ten years of continuous growth since 2010-2019. The unprecedented COVID-19 pandemic's blow to the tourism industry caused a high level of uncertainty, which led to the downgraded expectations for the tourism industry all over the world for the rest of 2020. The COVID-19 pandemic adversely impacts the tourism industry in Egypt as well as for all other countries with tourist destinations in high demand. The complete closure of borders led to the collapse of international travel and tourism to Egypt, with a significant loss in GDP and employment. Experts from all international organizations affirm that tourism has the potential to recover again and that tourists will travel again. Still, it will not be the same as before the pandemic, and this presents a gap to fill in the near future by attracting more tourists.

This paper aims to identify the changes in tourism industry components post-COVID-19 pandemic as perceived by Egyptian tour operators, and their expectations for the recovery of the international tourism demand. A total of 373 responses were obtained from employees working as Egyptian tour operators, with a response rate of 96%. Data were analyzed with the aid of the statistical package SPSS to measure the attitudes of Egyptian tour operators. This paper offers a significant contribution to the understanding of the future of the tourism industry in the post-COVID-19 pandemic, to policymakers, stakeholders in Egypt, and to the tourism literature. It will help the Egyptian government and tourism stakeholders to plan for tourism recovery in context with the new situation and to adapt to changing traveler behavior. The main results are summarized as follows:

- Domestic tourism demand is expected to recover faster than international tourism demand for Egypt during the period August to September, while the international tourism demand to Egypt would start to recover during the first quarter of 2021 (Q1 2021).

- The Egyptian tour operators expect that the recovery of tourism demand to Egypt, from Europe Market and Asia Market, will be during the first quarter of 2021 (Q1 2021), the Americas Market (North and South) will recover during the second quarter of 2021 (Q2 2021), Africa Market will recover during the fourth quarter of 2020 (Q4 2020- October to December period) while expectations for the Middle East and Gulf Market were in close proximity between the categories of the periods "October to December period - Q4 2020", the first quarter of 2021 (Q1 2021), and August-September 2020 period.

- The Egyptian tour operators see that there will be changes in tourists' behavior post-COVID-19 pandemic, the most significant changes by the tourist will include booking with known and trustworthy brands, choosing hotels which use an effective hygiene system. They will be searching for hotels that offer minimum touchpoints. Also, there will be expected changes in the request for accommodation services, the most significant being preferring no long lines at check-in and check-out, no crowded buffets, and observing the social distancing will become the new norm within hotels and restaurants. In addition, the face mask will be required everywhere, and hotel operators would be expected to provide hand sanitizer in rooms.

- The Egyptian tour operators anticipate changes in tour operators' services post-COVID-19 pandemic, the most significant being the use of plexiglass barriers that separate the driver, mandatory travel insurance that includes COVID-19 protection, tourism will be more domestic, the face mask will be a must during tours, and inside the museums. Moreover, travel packages need to be directed towards more conscious travel. Tours should be more sensitive and responsible towards the environment and community. Also, there will be expected changes in airlines and airports' services post-COVID-19 pandemic, the most significant changes will include that the passengers wear a face mask or cloth mask in order to enter the airplane, passengers should provide additional documentation regarding their personal health before flying and entering a country, health-checks may get added to check-in routines, the social distancing will become the new norm at airports and on board in airplanes, and face mask will be applied everywhere inside airports.

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مستقبل السياحة بعد جائحة كوفيد-19: من وجهة نظر منظمى الرحلات المصريين

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معلومات المقالة

الكلمات المفتاحية

جائحة كوفيد-19؛ منظمى الرحلات السياحية المصرية؛ الطلب السياحى، تأثير كوفيد؛19، التغييرات بعد كوفيد-19.

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الملخص

تعد جائحة كوفيد-19 هي أسوأ أزمة يواجهها قطاع السياحة في تاريخ السياحة الدولية. فقد عدلت منظمة السياحة العالمية توقعاتها لعام 2020، والتي تظهر خسارة 67 مليون سائح وافد، و80 مليار دولار أمريكي في الإيرادات، و100.8 مليون وظيفة. أدى الإغلاق الكامل للحدود إلى انهيار السياحة الدولية إلى مصر مع خسارة في الناتج المحلي الإجمالي وفرص العمل. تؤكد منظمة السياحة العالمية أن السياحة لديها القدرة على الانتعاش، لكنها لن تكون كما كانت من قبل، وهذا يمثل فجوة يجب سدها، وهي كيف يمكن استئناف الأنشطة السياحية في المستقبل. تهدف هذه الورقة إلى تحديد التغييرات في مكونات صناعة السياحة وتوقعات الطلب على السياحة الدولية لمصر بعد جائحة كوفيد-19 كما يتصورها منظمو الرحلات السياحية المصريون. تم جمع بيانات المسح باستخدام استبانة مغلقة من ٣٧٣ موظفًا في منظمي الرحلات السياحية في مصر. تم تحليل البيانات بمساعدة الحزمة الإحصائية SPSS. تظهر النتائج أن السياحة ستكون أكثر محلية، وسيصبح أقنعة الوجه والتباعد الاجتماعي هو المعيار الجديد، وسيختار السائح الفنادق ذات نظام النظافة الفعال، وسيكون الفحص الصحى أمرًا ضروريًا لدخول المطارات والطائرات، والتي تقدم مساهمة كبيرة لفهم مستقبل صناعة السياحة من قبل صانعي السياسات وأصحاب المصلحة والباحثين في مجال السياحة.