THE IMPACT OF COVID-19 PANDEMIC ON THE EAC TOURISM AND HOSPITALITY INDUSTRY

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Abstract

Worldwide, the COVID-19 epidemic has impacted all economies. The study examines the impact of the pandemic on the tourism and hospitality industry in East African Community member nations. This study is a systematic review of Covid19's influence on the tourist and hospitality industries. The analysis is based on 54 publications collected from the Web of Science and Scopus databases. The current study was motivated by an extensive review of literature. According to these studies, the spread of COVID-19 disease to workers in the tourism industry has put the sector in jeopardy; travel restrictions and tourism guidance have made tourism and hospitality industry suffer from severe reduction of revenues. All these studies however do not clarify how, the pandemic has impacted tourism and hospitality industry in terms of national park visitors, hotel occupancy, and unemployment in particular. Therefore, the current study assesses the impact of COVID-19's on tourism and hospitality in the EAC Partner States by using such indicators as the number of international tourists, receipts and tourism jobs generated, visitors to the parks and the rates of hotel occupancy.

The study's findings show that the EAC Partner States lost USD 4.8 billion in foreign tourist earnings and two million jobs in the tourism sector due to COVID-19. The numbers of visitors to the National parks decreased by 65 percent, hotels in the region had an average occupancy rate of less than 30 per cent, which had a substantial impact on their operations. The study recommends to actors in tourism destinations, to have pandemic preparedness and risk management plans.

Keywords: COVID-19, Tourism, Hospitality, East Africa Community

1.0 INTRODUCTION

Tourism and hospitality industries are thought as the fastest growing sectors globally (Chuo, 2007). However, the sectors have become extremely vulnerable due to a variety of pandemic and infectious diseases (De Sausmarez, 2004; Zhang et al., 2020). The new COVID-19's outbreak has caused significant shortfalls in the tourism and hospitality industries globally in recent years (Lagos, et al, 2021). The discovery of China's novel coronavirus in Wuhan province in December 2019 triggered an international health emergency (WHO, 2020). COVID-19 such a highly infectious diseases that it quickly spread to nearly 195 countries, resulting in approximately 328,341,638 cases up to February 2, 2022 worldwide (Worldometer, 2022). As the number of cases increased, a total lockout was imposed in all countries that had been severely affected by the COVID-19 pandemic.

In the context of more than 30 new diseases in the world in the last 30 years, the 2020 witnessed an alarming and devastating outbreaks of new pandemic diseases (Nkengasong, 2020). The previous SARS outbreak, which was more or less similar to COVID 19, was widely publicized and resulted in World Health Organization travel advisories (Chuo, 2007). Travel restrictions and tourism guidance have rendered tourism and hospitality industries as risk factors to tourists (De Sausmarez, 2004). Travel restrictions have been in force in many countries around the world as a result of the pandemic. Thus, travel and trade restrictions, border closures, action restrictions, quarantines, and other control measures to the spread of the diseases have put tourism and hospitality sectors in jeopardy (Gossling et al., 2020).

The COVID-19 epidemic has occurred at the time when hotel business has been increasingly important to the global economy. The hotel business involves a large number of players including both national and foreign customers

subjecting hotel staff and travellers to a considerable social exposure thus significantly increasing the risk of infection and transmission. (Leung & Lam, 2004). Prior studies on the impact of COVID-19 crises on national welfare concentrated on the effect of the pandemic on the national economies generally rather than on the welfare of hospitality and tourism industries in particular (Mair et al., 2014; Jian et al., 2017).

According to schorls (Lepp & Gibson 2003; Taylor & Toohey, 2006) personal and physical security impressions impact negatively people's intent to go to the destinations where security problems exist, and these impressions are generated in part by the media, friends, and family members (Murphy et al., 2007; Gitelson & Kerstetter, 1995), (Kozak et al., 2007). Countries which were severely affected by the COVID-19 outbreak went to the extent of closing their borders (Tanne et al., 2020). In 2020, travel restrictions were implemented globally, resulting in an unparalleled economic disasters (Tanne et al., 2020; Fernandes, 2020)

Following the outbreak of the COVID-19 pandemic, the United Nations World Tourism Organization UNWTO forecasts that the tourism sector would experience its deepest and biggest crisis on record in 2020, (WHO, 2020). As a result of severe limitations on travel, international tourist arrivals, overnight visitors fell by 74 per cent in 2020 compared to the year 2019 globally (D'souza, 2020). Since the 2019's global economic crisis, income from global export fell by an estimated USD 1.3 trillion, which is 11 times more than that of 2009.

Travel and tourism in 2019 contributed to an average of 9.5 per cent of the GDP of the EAC Partner States. Compared to the cross national average, Tanzania had the highest percentage contribution of 17.1 per cent, Rwanda had the lowest percentage of 10.0, and Kenya had a slightly higher percentage of 9.7. Currently, with Tanzania having 26 per cent, Rwanda (21.0 %) and Kenya (17.2 %), tourism industry contributes significantly more to the EAC's overall exports trade (18.1 percent) (EABC,2021)

Uganda and Burundi, on the other hand, had a 16.6 and a 4 per cent respectively of the share of export revenues from tourism in the EAC (EAC, 2020).

The Deloitte Report, published shortly after the COVID-19 epidemic was one of the most insightful economic effect analyses conducted worldwide and within the East African Region in May 2020. The pandemic was expected to affect a wide range of industries, including those in the tourist and hospitality industry. According to the report, airline passenger revenues fell by USD 314 billion in 2020 compared to 2019. Global airline ticket revenue fell by 55 percent; approximately 100 million jobs were lost in the tourism sector, with a quarter of them in the G20 countries; and the GDP was affected by USD 2.7 trillion. The survey also predicted a beneficial influence on other businesses, such as online merchants and a rise in the demand for clean and dry goods, chilled, and frozen food. Physical stores, on the other hand, were badly affected. It was also revealed that the growing unemployment had a negative impact on the economy (Deloitte, 2020). COVID-19 has caused unprecedented damage to the hotel industry (Deloitte, 2020). Massive cancellations of flights, excursions, and other events, as well as hotel reservations, have resulted in substantial drops in hotel occupancy rates and a drop to the average room prices, resulting in historic low profit margins in the hotel industry (Mensah, I 2020).

Before the COVID-19 pandemic, Africa's tourist industry employed 24 million people, but by the year 2020, that figure had fallen by 51 per cent (12.4 million) (Statistica, 2021). The global trend of travel and tourism revenue due to COVID-19 by country 2019-2020 Hotel and restaurant operations was halted indefinitely, as have those of travel companies, airlines, and cruise ships. Businesses in the lodging and food service subsector face an extremely challenging business climate, which has a significant influence on job chances.

According to the hospitality analytics firm, it will not be until 2022 for hotel occupancy rates to recover to the pre-crisis levels (Statista,2020).

The current study was motivated by an extensive review of literature. A study by Gossling et al., 2020 revealed that COVID-19 has put the tourism industry in jeopardy but the study did not clarify how the disease affected national park visitors, hotel occupancy, and unemployment in the tourism and hospitality industry in particular. Leung and Lam (2003) study fused on the spread of the

COVID-19 diseases to workers in the tourism industry, but the study did not show how the infectious diseases impacted the industry from the perspective of national park visitors or hotel occupancy. A study by De Sausmarez (2004) looked at travel restrictions and tourism guidance causing severe damage to tourism and hospitality industries. However, the study did not indicate how travel restrictions caused by COVID-19 have affected the tourist and hospitality businesses in terms of tourists arrival to the National Parks in East Africa Partner States. Delloite (2020) published a report on economic impact analyses globally and within the East African Region. The report states how the pandemic was expected to affect a wide range of industries economically, including those in the tourist and hospitality sectors. The COVID-19 cause unprecedented damage to the welfare of the hotel industry, but the report did not specify what parts of the tourism and hospitality industries were affected by the COVID-19. Therefore, the current study assesses the impact of COVID-19's on tourism and hospitality in the EAC Partner States by using such indicators as the number of international tourists, receipts and tourism jobs generated, visitors to the parks and the rates of hotel occupancy
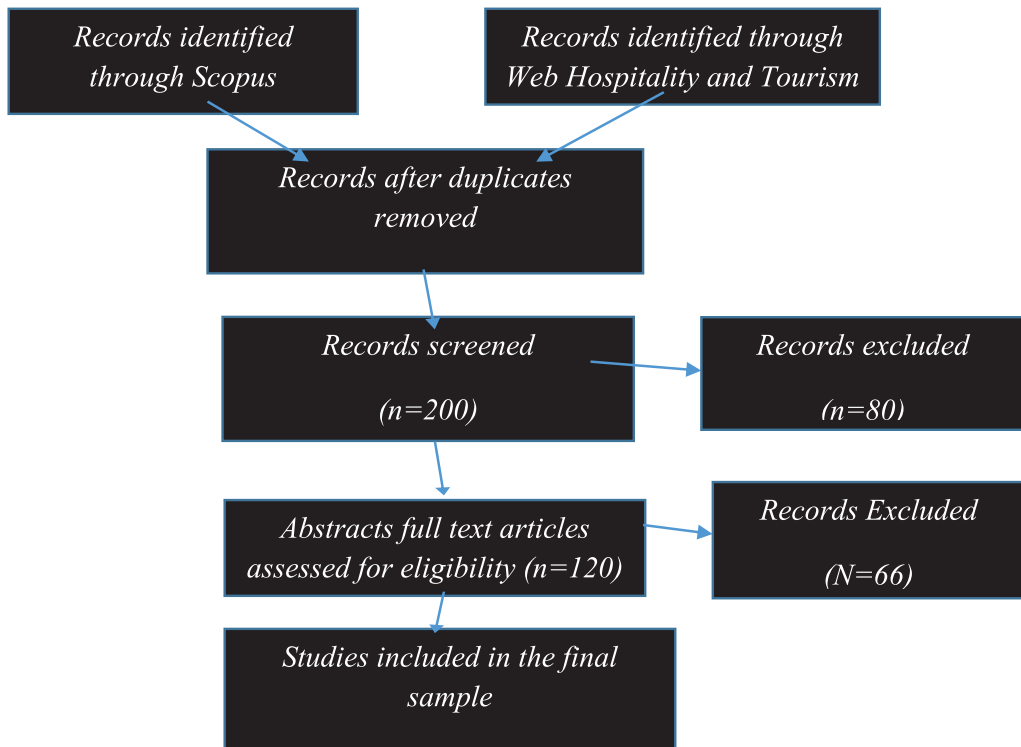
2.0 METHODOLOGY

This study is a systematic review based on objective and rigorous standards that allow for transparency and replication by other researchers. A systematic review differs from a literature review, which is author biased (Tranfield et al., 2003). The three primary parts of our systematic literature reviews include defining the sample of articles to be evaluated and making descriptive and qualitative description and analysis. Each step is then discussed. The authors reviewed and corroborate data from hundreds of published and documents as reflected in the reference list, such as academic journals, working papers government websites, local and international media stories and other global online sources. The study was deemed relevant because COVID-19 was initially announced by WHO as a global health emergency. Thus, investigating its effect on tourism and hospitality industry in East Africa was a crucial endeavour. East Africa was chosen because these countries are endowed with tourist attractions. Tanzania for example, has twenty-two (22) national Parks including Serengeti, Katavi, Sadaan, Ngorongoro, and Mikumi. The country

has the highest mountain in Africa , the Mount Kilimanjaro. For Kenya on the other hand, has twenty four (24) National Parks including the Masai Mara, Amboseli, Lake Nakuru, and Ol donyo Sabuk National parks. Uganda has ten (10) National Parks including Queen Elizabeth, Lake Mburo, Murchison Falls, Kidepo Valley, Kibale, Mount Elgon, Rwenzori Mountains, Semuliki, Mgahinga Gorilla, and Bwindi Impenetrable National Parks. Rwanda has four (4) national parks, several protected wildlife reserves and ecosystems. These include the Akagera National Park, Nyungwe National Park, Gishwati-Mukura National Park and the Volcanoes National Park. Burundi the "Heart of Africa", is blessed with three (3) major national parks such as Kibira, Ruvubu, and Rusizi National Parks. These parks display the best sceneries in East Africa, thus the industry contributes significant revenues to the National Income as well as creating employment to millions of people in the EAC.

Publications that meet the following criteria were included, Scopus databases: directly connected to Covid19: (covid19 OR coronavirus) in the title, abstract, or keywords; (ii) indirectly related to Covid19: (covid19 OR coronavirus) in the title, abstract, or keywords;and

(ii)tourism and hospitality issues: in the title or keywords, look for (national park visitors* OR hotel occupancy OR revenue OR job loss). Furthermore, only papers written in English and categorized as "article" or "review" and published in 2020 were considered.

A search in the ISI Web of Science was used to define the sample for the systematic literature review. The PRISMA protocol (Moher et al., 2015) advised that the article selection procedure be done in phases (Figure1). Following the removal of duplicate entries, an initial screening was conducted based on article titles and abstracts to identify papers in which Covid19 and tourism and hospitality were not the primary topics. An external file containing a photograph, illustration, or other image.

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│ through Scopus      │        │ through Web Hospitality │
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Articles with religious biases, articles on the general impact of COVID -19 without mentioning the impact on tourism and hospitality; articles on the general impact of COVID -19 without mentioning tourism and hospitality.

To limit the risk of bias, the screening and eligibility processes were carried out by two authors who reviewed the papers separately. Publications that were rejected by both authors were eliminated from the study sample. In the event of a discrepancy, the item was accepted for the next phase. The two authors disagreed on 66 articles at the eligibility phase, which was resolved after a discussion with the two authors. A total of 54 articles were included in the final sample.

The sample was evaluated in the second step based on its metadata. MS Excel was used to identify the most frequently referenced journals and publications. The VOSviewer program was then used to create the journal cogitation and keyword networks (van Eck & Waltman, 2010). To get the initial picture of the sample, each type of data was evaluated. The keyword network was very useful

for identifying topic clusters, which were important for the next study phase, which focused on classification and qualitative analysis of the articles.

The substance of the papers was investigated in the third step of the systematic review. Two readers separately read the abstract and discussion parts of the papers and arranged them on an MS Excel sheet. As a result, the content of each article was extracted and divided into two categories: tourism and hospitality (e.g., effects on jobs in tourism sector, national park visitors, occupancy rates etc.).

Keyword network analysis and qualitative analysis of the publications were used to define the features of tourism. Divergences in the definition were resolved through consensus between the two readers. The two-dimensional categorization allowed for the identification of groups of articles that discussed comparable subjects. It was feasible to grasp what has been written regarding the influence of Covid19 on tourism and hospitality by extracting and accumulating information from each group.

3.0 RESULTS AND DISCUSSIONS

3.1 The Pandemic and detonation of Tourism and Hospitality Industry

By March 24, 2020, the world travel revenue was impacted by 98 per cent by extreme restrictions such as passengers quarantine upon arrival, partial travel bans, and border closures. To make matters worse, several airlines and aviation companies stopped their operations. In the midst of the COVID-19 pandemic, air travel restrictions were imposed as a means of protection and survival whereby the pursuits of pleasure and pleasurable retreats became sharply reduced (Nicola et al., 2020: Ranasinghe et al., 2020).

The COVID-19 epidemic has had a devastating effect on the tourist and hotel industry leading to the reduction of visitors to Hotels and National Parks due to a series of measures which were taken by all East African countries toward the end of March 2020.These included a ban on all flights into and out of the countries, school closures, lockdowns in the most important cities, restrictions on movements, restrictions on business that required direct contacts between

people and a strong emphasis on masking, social distancing and regular washing of hands. It is worth noting that EAC Partner States employed a variety of strategies to mitigate negative effects of COVID-19 on the travel and tourist industry.

3.2 The impact of COVID-19 on International Tourist Arrivals, Receipts and Tourism Jobs

The International Arrivals and receipts/Revenues on East Africa Community states

Table 2: Key tourism indicators in EAC region by Partner States

Country	Year	International Arrivals	% Change in Arrivals	International Receipts (USD Millions)	% Change in Receipts	Tourism Jobs	% Change In Tourism Jobs
Burundi	2018	286,518		4			
	2019	300,000	4.7	6	51.3	69,500	
	2020	90,000	- 70.0	1	-80.0	34,750	-50.0
Kenya	2018	2,025,206		1,528			
	2019	2,048,834	1.2	1,897	24.1	1,579,500	
	2020	567,848	-72.3	531	-72.0	789,750	-50.0
Rwanda	2018	1,711,000		374			
	2019	1,632,000	-4.6	549	46.8	331,200	
	2020	494,000	-69.7	110	-80.0	165,600	-50.0
Tanzania	2018	1,505,702		2,412			
	2019	1,527,230	0.3	2,667	10.6	1,550,100	
	2020	536,491	- 64.9	1,067	-60.0	930,060	-40.0
Uganda	2018	1,505,669		1,027			
	2019	1,542,620	1.4	1,000	-2.6	536,600	
	2020	473,085	-69.3	200	-70.0	268,300	-50.0
Total EAC	2018	7,034,125					
	2019	7,050,684	0.0	6,119	26.0	4,066,900	
	2020	2,161,424	-69.3	1,887	- 69.2	2,188,460	-48.0

Source: WTTC 2021 and Updated National Statistical Reports

The EAC Secretariat estimated that in 2020 visitor arrivals would fall by 67 per cent in the region, by 72.3 percent in Kenya and by 64.9 per cent in Tanzania. Kenya's tourism sector began to deteriorate where international visitor arrivals fell by 72 per cent between January and October 2020 as opposed to the previous year. This caused an estimated USD$ 1.1 billion loses in direct tourism income and an estimated $ 0.73 billion in indirect income between January and March 2020 resulting from a decline in the number of tourists. Many airlines sent the majority of their employees on unpaid leave and the management teams and the CEO received salary cuts of 75 and 80 per cent respectively. According to predictions, the Ministry of Tourism and Wildlife and Kenya's tourism-related firms, , were predicted to face job losses, staff redundancies, and temporary closures in the short future. As a result, the Kenyan Government shifted its focus to the local market in order to jumpstart the tourist business.

Most locations lowered visitor user fees and levies in order to increase visitors. As part of the efforts to ensure speedy recovery for the sector, the EAC citizens would reap the benefits of the community by been charged local rates while entering public tourist sites such as national parks and natural reserves that are located across the region. Such measures were taken by Rwanda by cutting park fees, particularly for mountain gorilla trekking, from USD$ 1500 to USD$ 500 for international residents and to $200 for Rwandans and EAC citizens to mitigate the negative effects of COVID 19 to tourism and boost domestic and regional tourism. Also, Kenya Wildlife Service (KWS) lowered admission fees for national parks and reserves by 50 per cent and imposed a one-year embargo on rent payments to lodge owners within its parks and reserves and promoted multi-destination tourism packages that encourage visitors to travel to more than one EAC Partner State in a single trip.

Tanzania's tourist arrivals decreased by 76 per cent , and roughly 437,000 jobs were lost resulting in a revenue loss of more than 80 per cent. Uganda hotel bookings decreased by 92.1 and 99.8 percent, respectively, among tour operators and travel brokers by June 2020. In the 2020/2021 financial year, Uganda estimated a loss of US$ 1 million tourists and International travel began only in the third quarter of COVID-19 after Uganda's borders were reopened in September 2020. Uganda lost 1 million visitors and US$1 billion

in the 2020/2021 fiscal year. International travel resumed in the third quarter of COVID-19, following the reopening of Uganda's borders in September 2020. Burundi's internal lock-downs are said to have impacted 70 per cent of international visitor arrivals. EAC region had a 69.3 percent decline in foreign visitor arrivals.

3.3. The pandemic effect on Visitors to Parks in East African Countries

Table 3 indicates the impact of COVID 19 on the number of National park visitors on each partner state in the East Africa region.

Table 3: Number of National Park Visitors in EAC region by Partner State

Country	Year	Number of Visitors in Parks	Percentage Change
Tanzania	2019	4,000,000	
	2020	1,500,00	-61
Rwanda	2019	43,083	
	2020	36,000	-67
Kenya	2019		
	2020	2,250,000	-61

Compared to 2019, the number of visitors to national parks and reserves in the four EAC Partner States of Kenya, Rwanda, Tanzania, and Uganda was expected to fall by an average of 64.6 per cent in 2020. There was a fluctuation in the rate of decline in these member states.

Visitors to Kenya's national parks declined by 61 per cent in 2019 to 2,250,000. The visitors to Rwanda's national parks declined from 43,083 in 2019 to 36,000 in 2020. Visitors to Tanzania's national parks was expected to decline from 4,000,000 in 2019 to 1,500,000 in 2020. The greatest declines in park visits occurred in Uganda and Rwanda, by 68.7 and 67.5 percent, respectively. In Tanzania, visitors declined by 61.8 per cent and in Kenya by 60.3 per cent .

The variation in the decline was attributed to an increased engagement of Kenyan and Tanzanian domestic visitors. Additionally, Tanzania was reported to have encouraged foreign tourism in the second part of the year, which may have prevented a larger fall in visitors to Parks. The loss of funding from Park admission fees and concessions has far-reaching consequences for animal conservation efforts due to a decrease in visitors to the national parks.

3.4 Pandemic impact on Hotel Occupancy Rates in EAC States

The East African Business Council (EABC) conducted a study with the African Economic Research Consortium (AERC) and the Bill and Melinda Gates Foundation to assess the impact of COVID-19 on the tourism and hospitality industries, as well as policy options to protect sector players from future pandemics and disruptions caused by COVID-19. According to the report, tourism was one of the most impacted sectors in the region, accounting for an average of 9.5 percent of GDP in 2019 and 17.2 percent of total EAC exports. This was reflected in significant decreases in foreign tourist arrivals, revenues, jobs, park visits, and hotel occupancy rates.

The hotel subsector in the EAC Partner States, like everywhere in the globe, was ravaged by the epidemic as a result of large cancellations in March and April. Hotel occupancy rates were low in EAC Partner States from April to December 2020, owing to the low level of foreign visitation. In Uganda, the hotel occupancy rate fell from an average of 51.9 percent in 2019 to 20 percent in 2019.

In March 2020, the Central Bank of Kenya conducted a study of hotels in Kenya, which found that hotels had an annual average of 27.6 percent bed occupancy in 2020. Hotels in Kenya appeared to be operating well in the first two months of 2020, as evidenced by January 2020, the monthly average bed occupancy was 64 per cent, rising to 65 per cent in February. It then declined dramatically in the months of March by 39 per cent, April by 7 per cent, May by 6 per cent and June by 9 per cent. The occupancy rate improved slightly in the second half of the year, culminating in the previously mentioned 27.6 per cent yearly average. Hotel occupancy rates in Kenya remained low at 26.3 percent in the first quarter of 2021.

4.0 CONCLUSIONS AND RECOMMENDATIONS

COVID 19 had a negative effect on East Africa Partner states in tourism and hospitality industry. The magnitude of this crisis and its devastating effects on the National Parks, Visitors, Hotels, and employees are unrivalled compared to other crises. Whereby two million jobs were lost during the pandemic, National parks visitors decreased by sixty-five percent in East Africa states, hotel occupancy decreased by thirty percent and the revenue collection from tourism industry declined by US$ 4.8 Billion during the pandemic. Particularly, the Kenya's tourism sector began to deteriorate whereby international visitor arrivals fell by 72 per cent between January and October 2020, compared to the previous year. This produced an estimated USD$ 1.1 billion loses in direct tourism income and an estimated $ 0.73 billion in indirect income between January and March 2020 as a result of fewer customers.

Tanzania's tourist arrivals decreased by 76 per cent, and roughly 437,000 jobs were lost resulting in a revenue loss of more than 80 per cent. Uganda hotel bookings decreased by 92.1 and 99.8 percent among tour operators and travel brokers, respectively, by June 2020. In the 2020/2021 financial year, Uganda estimates a loss of US$ 1 million tourists and International travel began only in the third quarter of COVID-19 after Uganda's borders were reopened in September 2020. Uganda lost 1 million visitors and US$1 billion in the 2020/2021 fiscal year.

Compared to 2019, the number of people visiting national parks and reserves in the four EAC Partner States of Kenya, Rwanda, Tanzania, and Uganda was expected to fall by an average of 64.6 per cent in 2020. There was a fluctuation in the rate of decline in these member states.

The hotel subsector in the EAC Partner States, like everywhere in the globe, was ravaged by the epidemic as a result of large flight cancellations in March and April. Hotel occupancy rates were low in EAC Partner States from April to December 2020, owing to the low level of foreign visitation. In Uganda, the hotel occupancy rate fell from an average of 51.9 percent in 2019 to 20 percent in 2019.

There is a need for tourism destinations to have pandemic preparedness and risk management plans and secure the nation against threats. The industry is quickly adopting a digital space while hospitality industry is slowly recovering, while the COVID-19 crisis continues to exert profound impacts on the operations of hospitality businesses. Hospitality businesses are expected to make significant development to their operations in the COVID-19 business environment in order to ensure employees' and customers' health and safety, and enhance customers' willingness to patronize their business. The EAC states should prioritize tourism in their recovery efforts by exchanging tourism data within the area, and by implementing COVID-19 immunity passports and certificates.

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