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Changing the industry's dynamics Covid 19's reversible impacts on Pakistan's reviving tourism

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CHANGING THE INDUSTRY'S DYNAMICS
COVID 19'S REVERSIBLE IMPACTS ON PAKISTAN'S
REVIVING TOURISM

This Capstone Project is submitted to the Faculty of Business Administration as partial fulfillment of Master of Science in Journalism (MSJ) degree

by

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Supervised by

Kamal Haq Siddiqi

Director

Centre for Excellence in Journalism

Institute of Business Administration (IBA), Karachi

Fall Semester 2020

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Will Pakistan’s tourism industry face a revival after Covid-19?

Pakistan’s tourism industry, still in its infancy, has taken a major hit during the coronavirus pandemic. But experts say all is not lost yet and it may soon begin to thrive.

As March rolled in and the winter began to retreat, hotel and guest house owners in Pakistan’s scenic Gilgit-Baltistan region began to prepare for an influx of foreign and domestic visitors for spring-summer season. However, the coronavirus pandemic struck, bringing all travel to a halt and shuttering hospitality businesses across the world.

All of a sudden 30-year-old Zulfiqar Ali Shigri, who owns a one-star hotel and guest house in Shigar, lost his only source of income. “Before Covid-19 business was good as we had guests on a daily basis. But when the pandemic started, everything stopped and the tourism industry came to a halt, so we were out of work,” he said.

Shigri’s native region of Gilgit-Baltistan welcomes millions of tourists during the spring-summer season, but with the pandemic in full spring during peak travel season, his guest house along with hundreds of hospitality businesses across Pakistan remained shut for months causing millions in losses to the economy.

A year of unprecedented loss

With the WHO declaring the coronavirus outbreak a pandemic in March, many countries went into strict lockdowns to limit the virus’s spread. Employees were moved to working from home, all non-essential businesses such as restaurants, markets and leisure outlets were shut and only essential services such as pharmacies, petrol pumps and grocery stores were allowed to operate in a restricted capacity with strict new health protocols in place.

The United Nations, the World Trade Organization as well as the World Travel & Tourism Council (WTTC) estimate a 22% decline in international travel in the first quarter of 2020 while for remaining year, the decline was expected to fall between 58% and 78%. This results in an estimated loss of USD 910 billion to USD 1.2 trillion in export revenues from tourism worldwide. To make matters worse, the WTTC in its April 24, 2020 prediction forecast that 100.8 million jobs are at risk globally. A return to the pre-crisis employment levels in the sector are not expected to occur before 2022. (Organisation for Economic Co-operation and Development, 2020)

According to the website Trade for Development News (Vickers, Ali, & Ramsay, 2020), tourism is a vital source of income especially for least developed countries, accounting for 9.5% of their GDP. The measures introduced by the governments of these countries to halt the spread of the virus have plugged the cork on these revenues and subsequently livelihoods on many households.

The challenge for Pakistan

Just as things had started to pick up for Pakistan's tourism sector with Premier Imran Khan throwing his weight behind a lot of infrastructure and promotion initiatives, Covid-19 struck. For six decades, the country's primarily domestic tourism sector has struggled due to lack of focus and funding and the scourge of terrorism. This pandemic seemed to have sounded the death knell, initially grinding the industry to a halt, however potential reversals are coming to the fore which, may not be economically viable or friendly, but are set to revolutionize the country's tourism industry in an unprecedented manner in the coming years.

In Pakistan, the significant loss of tourism revenues has led the government to postpone, delay or revise several of its tourism initiatives. Before the onset of Covid-19, the country made headlines world over in several renowned travel publications like the American travel magazine Condé Nast Traveler, the British Backpacker's Society and Lonely Planet as one of the most promising destinations of 2020. This was driven by significant improvement in law and order, decline in terrorism, a successful counter militancy program and the government's priority to showcase Pakistan's untapped tourism potential.

The widely hailed micro-lockdown strategy in the country also helped rein in the pandemic during the first wave. Now, the challenge is how to re-open the tourism sector, revive confidence of stakeholders and generate revenue in the face of a potentially deadlier second wave.

With the reopening of tourist sites and an expected influx of tourists, the possibility of the virus's spread looms large because of violations of set SOPs and preventative measures. Crisis in one sector could have a ripple effect throughout the whole tourism industry chain due to the interdependency of services.

Director of Karachi-based Professional Institute of Hotel & Tourism Management (POHTM) Mansoor Iqbal Siddiqui explained: "On the whole, tourism has been affected a lot and has faced a major disturbance. We as a sector are now pretty down. The biggest damaging effect

that has come is that people have become jobless. Food outlets and many restaurants have shut down.”

Speaking about bookings for seasonal tourism opportunities, he said, “Everything has finished. Financially there has been a lot of loss for people who had made investments in their own projects, all those projects have run into losses.”

Atoofah Rehan, CEO of women-centric travel agency Travelsome said, “This year is very different because right now a lot of destinations are still closed off. So seasonal tourism for this year is not something that we can focus on for the moment due to the pandemic.” (Rehan, 2020)

It has been a tough year for the sector as a whole. The country’s hotel industry reported a loss of over Rs100 million in the month of February 2020 with bookings dropping from 95% to 40% from January to March 2020. (Tourism Recovery Action Committee (TRAC), 2020)

From the small guest houses and hotels in Gilgit-Baltistan and Galiyat and to the large international hotel chains in major cities, everyone has suffered.

For Zulfiqar Ali Shigri, a guest house owner in Gilgit-Baltistan’s Shigar town and sole provider for his family, it wasn’t his business alone that took on damage, but his health as well. “Covid-19 brought the tourism industry to a halt, which ultimately made us suffer a lot in our business. But, even psychologically, I had no peace of mind as I could not cover the needs of my family which ultimately affected my mental health.”

Uncertainty over the whole situation has left larger luxury hotels in a conundrum as well. The General Manager of Karachi-based Regent Plaza Khalid Ahmed Sheikh said, “During Covid-19, we cannot largely foresee what the coming months would be like, therefore there is a lot of uncertainty. The current situation of both travel and tourism, and its related hotel industry is in front of you.”

Speaking of a potential revival, he said business is not fully back yet, international travel has not resumed in full swing and many decisions regarding the travel and hospitality businesses are still pending, so for now it is difficult to predict what the industry could look like in coming months.

Speaking on behalf of the Managing Director of Pakistan’s Hotels Developers and Chairman of Pakistan Hotels’ Association Zubair Baweja, Sheikh strongly criticized the government for not providing relief packages for the hotel industry, especially Karachi’s hotels. He said, “Only the bigger groups have gotten some relief with regards to tax and licensing. The

government has supported the construction industry but not supported the hotels industry. It hasn't given any relief package to the hotel and tourism industry. None.”

Observing that some business has returned to the industry, Sheikh said, “Now occupancy has somewhat increased from 10% to 20%, otherwise the conditions were very bad. We had to close our hotel for more or less five months. So, during that there was no relief, nothing.”

He added that the government had announced that the hotel industry which had suffered badly could apply for loans to cover for their employees' salaries, but many hotels remained unable to avail such loans. Sheikh said, “They said you could apply to the State Bank or other banks for loans, but we couldn't even get that relief because they had such strict conditions.” He explained that to apply for loans you had to provide assurances that you would return it, but when hotels weren't getting any business and there was still uncertainty about future business, they were unable to give any such assurances.

He added that there has been a serious lack of policy making for the hotel industry on the part of the government during the pandemic. “Some things are not clear. Aside from instructions such as putting on masks, maintaining social distancing and implementing smart lockdowns, there hasn't been any clear policy or relief or support packages for the industry.”

According to Sheikh, the industry has suffered tremendously already and since Covid-19 is not going away any time soon, it's still too early to say if a revival is coming. He said, “We have only come to 20% occupancy. There are no international flights. Nothing can be said for now.”

On the other hand, despite all the economic shocks to the industry, travel agency operator Atoofah Rehan is optimistic about the future. She said, “I think there is going to be a boom in the travel industry next year, because people, not just in Pakistan, but across the world, are tired of sitting at home due to the lockdown. There is a lot of mental pressure on them because they just want to get out.”

She added: “Of course, right now it has been affected severely but as and when the destinations keep opening and countries begin opening their borders, people will just begin flocking to international destinations.”

She is of the view that the tourism and travel industry, especially of Pakistan, will experience a quick recovery phase after the pandemic recedes. According to Rehan, “It has already started. That is again because of the lockdown people are just sick and tired of staying at home and

they want to visit places and explore and go outside. So, I see a positive impact for the coming future.”

Rehan’s optimistic statements counteract some of the negative impacts that Siddiqi and Sheikh mentioned, especially Sheikh who said hotel rooms occupancy was hovering around the 10%-20% mark and lack of international flights meant fewer tourists.

Is a revival coming?

Due to the coronavirus pandemic, travel to and from Pakistan has dropped by 60-70%. The Asian Development Bank’s 2020 report (Hussain, 2020) is projecting a worst-case financial loss of USD5.8 million dollars for the country. (Hussain H. , 2020)

In March 2020, the Civil Aviation Authority reported losses of USD18 million and the Pakistan Association of Tour Operators has reported 100% cancellation of tour bookings for the spring season with losses of up to USD10 million (Tourism Recovery Action Committee (TRAC), 2020), coupled with the fear that Covid-19 will greatly reduce foreign tourist arrival by 90% for the remaining year. (Tourism Recovery Action Committee (TRAC), 2020)

After the nationwide lockdown and major restrictions were lifted during the summer after the first wave subsided, some domestic travel picked up in the country as tourist spots were reopened and hotels were allowed to have guests with restricted occupancy and strict SOPs in place. Although a second wave is ongoing where restrictions are largely loose, travel agencies are also gearing up for a peak in domestic and international bookings as people try to take advantage of loosening restrictions post second wave as well.

Despite the negative effects and bleak projections for Pakistan’s travel industry during the first wave of the pandemic, the second wave is bringing about a small, but significant, reversal in the industry’s fortune. Travel is gaining momentum. Global flight operations to and from Pakistan have resumed with strict preventive measures in place. Airlines around the world are pumping more money on sanitization and revised health protocols. They have also had to issue a large number of refunds thus stomaching a substantial revenue loss in order to win back customers.

Airlines like Pakistan’s national flag carrier PIA which was running up losses and even at a point filing for bankruptcy, are returning to some semblance of normalcy, but, in an altogether different scenario. Resumption of international travel will be an encouragement to further flight

operations to PIA and other airlines preventing them from going under.¹ Similarly, UAE carrier Emirates remains optimistic. Vice President of Emirates in Pakistan Mohammad Sarhan said, “Covid-19 has posed significant challenges to the global travel industry and as the world adjusts to the next phase of the pandemic, Emirates is optimistic this will bring some stability for travel demand to return and economies to begin recovering.”

Travel operator Atoofah Rehan is already looking past the pandemic. She said, “2020 is the year that has changed the travel industry dramatically. So right now, what we have seen in terms of airfare is that it has been reduced to let’s say half or even in some cases to one quarter of the prices that were being charged. Because people are still not comfortable traveling abroad, airlines and hotels are providing a lot of incentives for guests to travel and to stay at their resorts or use their airline, etc. In this way, tourism has become more affordable to a lot more people. However, people still have fear of the virus due to non-availability of the vaccine and people are still reluctant to travel. We do see a lot more requests of female travelers coming through especially for Pakistan, because Pakistan is one of the countries that has kept its borders open. So, our nationals are still able to travel abroad unlike our neighboring countries like India which still has its borders closed.” (Rehan, 2020)

However, there is still a lot of difference in the way travel and tourism is functioning in the COVID-19 era in Pakistan and the rest of the world in terms of how SoPs and preventive measures are being abided by.

POHTM Director Mansoor Iqbal Siddiqui said: “They are dealing in a professional way. They have the systems and the complete equipment. They have all the SoPs. In this we are lagging way behind.”

According to him, what sets the global industry and Pakistan apart during this era is their preparedness. “They are mature. They do every work 20 to 25 years earlier. Before this incident they give crisis management trainings,” he said. (Siddiqui, 2020)

The new normal

With travel largely regulated and restricted to a certain extent the concept of eco-friendly tourism is gaining ground in the country’s disrupted industry. According to Aftab ur Rehman Rana,

¹ Air Travel in The New Normal - <https://tribune.com.pk/story/2263835/air-travel-in-the-new-normal>

president of Sustainable Tourism Foundation Pakistan, “Covid-19 has been more harmful in terms of economic impacts not in terms of environmental impacts. Rather, it has provided a good break for natural sites to recover as the pressure of tourists decreased during the pandemic.”

He explained that with the constant influx of visitors, scenic sights like *Jheel Saiful Muluk*, and the hill resort of Murree were constantly dealing with littering, commercialization, deforestation, pollution, habitat loss for animals, while in Chitral’s Kalash valley the customs and cultural traditions of the indigenous peoples have been commodified for making profit.

Rana said, “The arrival of fewer tourists has impacted the local economy but at the same time the pressure of mass tourism, which creates negative impacts on the local culture and environment, has also reduced. Sustainable tourism and eco-tourism has enhanced the preservation of local culture of indigenous people such as the Kalash in Chitral.”

Eco-friendly and sustainable tourism are not the first step in the diversification of offerings of Pakistan’s tourism industry or a concept only introduced in the wake of Covid-19. As Rana said, “This concept is old and Covid-19 has only enhanced its importance now as compared to the past.”

Pakistan has a unique blend of history and bio-diversity for lovers of eco and sustainable tourism. The country, which had failed to exploit its huge tourism potential due to various factors and the current coronavirus pandemic, is expected to enter a new phase in its development. Green tourism, if emphasized, will give way to the “new normal” in the industry leading to an environmentally conscious populace.

Explaining what it is and how it benefits societies, Rana said, “Sustainable tourism development meets the needs of the present tourists and host communities while protecting and enhancing the opportunities for the future. Eco-tourism itself is a product and has its main focus on conservation and community wellbeing and educational aspects of tourism. As a result of Covid-19 people in the tourism industry have become more aware of both forms of tourism and have started taking steps to make the sector more sustainable. You could say that the pandemic is making people more conscious about the sustainability aspect of tourism.”

He further said that “In Pakistan, eco-tourism is a new phenomenon and only some work has been done by some NGOs like Sustainable Tourism Foundation.” (Rana, 2020)

However, there is a huge market for this kind of tourism and a number of individuals and organizations are stepping into this wide space which will help counter the downturn of the industry while also paving the way for revival through eco-tourism. A recent example is that of a

startup travel agency called the Root Network which is working to create a more sustainable tourism industry in Pakistan by encouraging responsible travel in the Covid-19 era.

Aneeqa Ali, co-founder of the Root Network, explained, “Restarting tourism in Pakistan is necessary for economic recovery, but precautions must be taken to ensure it is not at the expense of local communities’ health and safety.”

She explained that the company aims to provide meaningful opportunities for local communities by promoting their culture and heritage and advocating for the adoption of responsible and safe travel and tourism practices across the industry, which benefit both travelers and local communities. (Malik, 2020)

What will the “new normal” for the travel industry be due to the reversible impacts?

In relation to his own hospitality institute and others based in Karachi, POHTM’s Siddiqui said, “I believe that online tourism should be promoted. By online tourism, I meant that online [tourism and hospitality] courses should be introduced.”

Siddiqui plans to execute distant online hospitality courses for interested candidates since physical learning centers are still closed. He explained that he planned to launch a “one-year course which can be completed in six months because right now you can’t say what will happen in the future. So, we want to cover the maximum course, in the least amount of time.”

In response to the Covid-19 pandemic which has challenged the dynamics of the industry, Siddiqui said of his institute, “We have brought changes in the curriculum and although we do not sell our diploma, we sell this [industry challenges specific] course so that the students can understand the industry and its current challenges better. Soon, we will also add our diploma alongside this. Students will benefit more from this course.”

Siddiqui intends to use the electronic media and broadcast media to present revolutionary concepts of tourism to the general public. “It should be done. We all agree,” he exclaimed, but he also believes that there should be no compromise on professionalism in the process of commercialism. “I will not say that I’m not commercial-minded. I am commercial-minded. We are very commercial-minded. But alongside that we also have a profession. We have an upper-level profession which has its own standards. When we work, we have to work according to our standards.”

As a corporate trainer Siddiqi has given classes in Karachi on crisis management in relation to the tourism industry and more specifically the hospitality industry. Now, rather than shutting down his institute or limiting classes and faculty as the national policy dictates in this crisis hour, he is looking forward to employing what he learnt from his crisis management trainings and courses and implementing comprehensive programs in response to Covid-19.

The director of POHTM said that he was hopeful of dealing with the situation in an effective manner and dealing with whatever issues that may arise for the industry.

In lieu of the pandemic Siddiqi also wants to venture into the green tourism sector of the tourism industry as a supplement to traditional tourism but said that he is restrained due to various factors.

He explained, “The biggest issue you see is that I want to conduct a course on the environment. The environment is a very strong thing essentially like a perishable item. It is also a product just like a hotel’s environment is a product just like its food, beverages, rooms, halls, swimming pools and other facilities, it also needs to be maintained.”

In terms of seasonal tourism opportunities for the post pandemic era, Rehan’s agency Travelsome has to its credit a specific product offering which no travel agency in Pakistan has ventured into yet. She said, “For seasonal tourism, one opportunity that we are exploring right now is related to the New Year’s period that is coming up. Now, New Year’s activities or tours are something that a lot of other agencies are doing or are offering at the moment, however no agency is offering women’s only New Year’s tours. So that’s something we plan to enter and explore.”

Given that most individuals and organizations are forced to adapt to working from home full-time, future travelers will now also be digital nomads, meaning both internet savvy and willing to travel longer and farther. Elaborating on this, Rehan said, “I think tour operators will try to offer incentives to tourists to take those leaves and holidays, especially in 2021 so that they can give a boost to their economy.”

She said, “I think this won’t just be for women, but generally for all travelers, the situation will be the same. The main thing is that people need to get over their fear of traveling. At the moment the fear of catching the virus from high contact places like the airport, the airplane or during the journey itself is very high. So, I think that’s the main fear that people have, and hotels and airlines are trying to incentivize travelers so that they do take this step and take the journey.”

Rehan’s agency is working along the same lines as the Pakistan Tourism Development Corporation and its competitors in launching and expanding bookings via e-commerce platforms

and social media. She explained that on one hand, this saves customers the hassle of having to physically come to the agency's office for bookings, while on the other, it helps travel companies to reduce management overheads.

She said, "Yes, we are working on our website so that customers can book everything through our portal. That portal will include not just the tour packages; it would also include hotels. We are also looking into incorporating airline bookings in it as well." She further said that her agency is also looking forward to conducting virtual reality tours in the midst of the pandemic as has become the norm in many Western countries.

However, Regent Plaza's General Manager Khalid Ahmed Sheikh does not appear to share Rehan's optimism about the industry's revival, particularly when it comes to hotels. He said, "The hotel industry will go in a decline as there is no business. When there is no business there will be no movement of money. No betterment will come. There is no business, and when there is no business you can't foresee any positive."

Speaking in terms of the industry's revenue generation and as an experienced hotelier Sheikh lamented, "A lot has come this year. No positive as far as I know. We were comparing our last year of revenue with this year and so far, we haven't even reached close. I don't think that any positive activity will come before a year or a year and a half more. If you compare last year or even the year before last year, or even before that, I don't think you would have seen the hotels' rates reduce as much as they have now."

While reduced travel has definitely affected economies and industries world over, there have been some positive effects on the environment. With tourist hotspots shuttered during peak travel season, wildlife and flora has flourished in the absence of tourists and for a short while global carbon emissions had reduced. Now, in the new normal travel era, tour packages will be tailored replacing air travel with road and rail where possible, reducing carbon emissions and also perhaps giving travelers a more genuine experience.

Many hotels, motels and resorts will have to opt for cleaner, contact-less technology such as body wash and shampoo dispensers instead of throwaway single-use plastic bottles and soap bars. Less turnover in hotels, longer staying occupants such as digital nomads working remotely will allow services such as laundry to be done less frequently, thus saving water. Although industry pundits differ widely in their forecasts of the post pandemic scenario, the one certainty is that travelers and service providers shall have to settle into a new normal. This will

entail more digitization, redesign of tour and hospitality packages and an innovative national agenda to drive revival.

Help is still needed

Back in Shigar, Zulfiqar Ali Shigri is happy to finally be able to welcome some guests back to his guest house. Although, the number of visitors isn't large and he is nowhere near his competition, he is thankful to have his business up and running again.

He said, "As a guest house owner, we have a limited budget to make an investment as well as to maintain our standard of service, it's a great challenge where we have to meet the services of the better hotels and resorts in the other places. Although we don't directly compete with a five-star hotel but we have to meet the service expectation in our limited budget."

He has also had to implement SOPs which have no doubt added to his overheads. "We have changed our policy to only have a maximum of two persons in every room. We provide proper hand sanitizers and masks to our guests and we sanitize our property every now and then." Yet, he continues to face the same issues that very likely other establishments in the country are also facing, that is, people who don't abide by the rules. "The most important factor is people not following proper SoPs and helping the virus spread even more which ultimately effects everyone in the society." (Shigri, 2020)

Following in the footsteps of the hotel industry that is devising supportive packages for guests in the wake of the pandemic, Ali is jumping the bandwagon to capitalize on his guest house income by developing guest house specific packages. He said, "Yes indeed, we are planning on giving cost effective packages to our guests until the situation normalizes. Budgeted stays are what we planning on incorporating."

However, Ali like other guest house owners does not think of himself as a one-man show or someone who runs his business solely with next to none public and private sector involvement. He has expectations from the PTDC and the NTDC in terms of delivering to guesthouses like his in the region in the wake of the pandemic and following it.

He said, "We expect them to support us in this regard by letting tourists travel to our locations as well as support us by providing incentives." Foreseeing a bleak future for the industry and the need for requisite help from the concerned sections of the industry, Ali said, "To be honest, the

upcoming year doesn't seem so good so we expect some support from government sectors as well as from the private sector to keep us in running mode.”

Although some in the industry have pointed out the reversible impacts of the pandemic and its ensuing restrictions, such as the return of travelers, room occupancy and seasonal tourism opportunities, Ali is not sure that he has seen anything positive in his region. When asked if and what new positive changes he has seen in the industry in the current climate, with uncertainty in his voice, Ali simply said, **“I don't think so.”**

Ali runs a business in a far-off mountainous area that has limited internet facilities. Yet, he is no stranger to digital technologies and social media which are altering not only social landscapes but also the tourism and travel industry. He remains hopeful of using the internet for his benefit. “Yes, it's a great tool to reach out to customers, so I'll be utilizing it for sure.”

Ali said he is intent on marketing and promoting his guesthouse and other guesthouses in his region and taking full opportunity to reach out to his potential consumers in the current pandemic scenario. During the course of his business, he has learnt how to operate his guesthouse in the thick and thin of the pandemic by conducting a SWOT analysis of the current hospitality market situation affected by the pandemic.

On behalf of all guesthouses located in the Gilgit-Baltistan region, he said, “It has made us learn a lot in the past year as it has given us a lot of time to think over our weaknesses and convert them into our strengths.”

The coronavirus vaccine is not expected to be available in Pakistan till well into next year. Until then, travelers, hotel and guest house owners, hospitality business owners and others associated with the industry will have to contend with the current situation. They would have to operate maintaining strict SoPs and branch out into digital tourism and other exciting new avenues to stay afloat, which some such as Travelsome and the Roots Network have already begun exploring.

It won't be easy. However, with the right approach, mindset and policy in place, Pakistan may well enough ride out the pandemic with its tourism industry not just surviving but thriving.

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