

Tourist Well-Being and Health Emergencies

Tunisian scale





Analysis of Threats and Enabling Factors for Sustainable Tourism at Pilot Scale

Tourist well-being and health emergencies Tunisian scale



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OVERVIEW

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REVIEW

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Index

Index	iv
List of figures	v
List of tables	vi
List of abbreviations	vii
I. Tunisia in the world's leading tourist region	1
II. Well-Preserved tourist Well-Being	4
II.1. Favorable characteristics for tourist well-being	4
II.2. Towards a generalization of travel medicine	5
III. Tourism and health risks: Effects of Covid-19	7
III.1. An unprecedented pandemic	7
III.2. Proven risks for international tourists	10
IV. General containment and its consequences	11
V. Tourism: Challenges and Mitigation Measures	13
V.1. Declining indicators	13
V.2. Various difficulties	15
VI. Deserted seaside resorts in summer 2020	20
VI.1. Aspects of crisis	20
VI.2. Some rescue attempts	22
VII. Prospects for the development of Tunisian tourism in the light of the lessons learned for the Coronavirus crisis	32
VIII. Conclusions	34
IX. References	35

List of figures

Figure 1. Increasing hotel capacity in Tunisia (ONTT, 2019)	2
Figure 2. Distribution of Natural sites along the Tunisian coasts	5
Figure 3. Number of Covid-19 cases registered by governorate in Tunisia, 24 January 2021 (JHU CSSE COVID-19 Data, 2021)	9
Figure 4. The fall (%) of European arrivals by nationality between 2019 and 2020 (ONTT, 2021)	16

List of tables

Table 1. Tourist arrivals and receipts recorded in Tunisia and in Mediterranean countries in 2018 (Organisation Mondiale de Tourisme, 2019)	2
Table 2. Epidemiological situation of Covid-19 in Tunisia and in some Mediterranean countries (23/10/2020) (European Centre for Disease Prevention and control, 2020)	8
Table 3. Falling GDP growth in Tunisia and in Mediterranean tourist countries in 2020 (World Bank, 2020)	12
Table 4. The fall in Maghreb arrivals in Tunisia according to nationality between 2019 and 2020 (ONTT, 2021)	16
Table 5. Evolution of the occupancy rate between 2019 and 2020 in the hotels opened in the seaside resort of Skanes-Monastir in Tunisia (ONTT, 2021)	22
Table 6. Date of reopening of the borders of Mediterranean tourist countries	31

List of abbreviations

HIA	Hotel Industry Association
ITA	International Tourist Arrivals
ADB	African Development Bank
CBT	Central Bank of Tunisia
UNCTD	United Nations Conference on Trade and Development
DEPF	Financial Studies and Forecasting Department
TFTA	Tunisian Federation of Travel Agencies
GEM	Grand Egyptian Museum
IATA	International Air Transport Association
INS	Institut National de la Statistique
INSEE	Institut National de la Statistique et des Etudes Economiques
WTO	World Tourism Organization
WHO	World Health Organization
ONTT	Office National de Tourisme Tunisien
PCR	Polymerase Chain Reaction
GDP	Gross Domestic Product
HIA	Hotel Industry Association
ITA	International Tourist Arrivals
ADB	African Development Bank
UNWTO	United Nation World Tourism Organization
OMT	Organisation Mondiale de Tourisme
ICAO	International Civil Aviation Organization

I. Tunisia in the world's leading tourist region

As the world's leading tourist destination, the Mediterranean basin hosts nearly 314 million ITAs per year, representing 30% of the total number of tourists in the world in 2014 (UNWTO, 2016). Prospects predict that ITAs will reach 500 million in 2030. Half of these arrivals are registered on the coasts of the Mediterranean countries. Tourism is a main pillar of the Mediterranean economies as it represents a permanent source of employment (11.5% of the total number of jobs in 2014) and economic growth (11.3% of the region's GDP) (WTTC, 2014).

For several Mediterranean countries, tourism is a strategic sector, a locomotive of economic and social development. This justifies the excessive installation of tourist resorts, the strengthening of infrastructure and logistical facilities to promote a promising activity. Given the importance of the possibilities for growth, the riparian countries are in strong competition with each other to attract a clientele of diverse geographical origins (especially from Europe) which is becoming increasingly demanding. Over the decades, the Mediterranean region has seen the number of its countries taking part in this strategic choice increasing and the number of its tourist products growing. This growth covered the fields of leisure, sports, health, business, culture, nature, and cruises.

Moreover, tourist activity is strongly contrasted between the riparian countries. Indeed, the Mediterranean basin can be divided into four distinct geographical areas:

- The countries of the North-Western Mediterranean such as France, Spain, Malta, Italy, and Monaco have long since experienced the development of tourist activity. It is currently solid and mature. The ITAs recorded in these countries exceed half of the total ITAs of the Mediterranean countries.
- The North-Eastern Mediterranean countries such as Slovenia, Croatia, Greece, Albania, and Cyprus are experiencing a more recent increase in tourist activity and the emergence of new destinations.
- The countries of the South-Western Mediterranean such as Tunisia, Morocco and Algeria are experiencing different contexts of tourism development. Tunisia is in the process of recovering its tourist markets; Morocco maintains a permanent growth of its tourist activity; Algeria still hesitates to present itself as a tourist destination in the Mediterranean basin.
- The countries of the South-Eastern Mediterranean such as Lebanon, Syria and Egypt have experienced internal instability for several years which has strongly affected tourist activity. Conversely, Turkey has recorded a clear and regular boosting.

In Tunisia, the country on the southern shore of the Mediterranean, tourism represents a main pillar of the national economy. This importance of tourism is justified by its share in the GDP (7% in 2018), the generation of foreign currency (\$1.713 million) and employment (400,000 jobs including 85,000 direct jobs).

Table 1. Tourist arrivals and receipts recorded in Tunisia and in Mediterranean countries in 2018 (Organisation Mondiale de Tourisme, 2019)

Country	International tourist arrivals (in thousands)	Revenues (\$millions USD)
Egypt	11,346	11,615
Spain	82,773	73,765
Italy	62,146	49,262
France	89,400	67,370
Croatia	16,645	11,831
Morocco	12,289	7,775
Greece	30,123	19,029
Turkey	45,768	25,220
Tunisia	8,299	1,713

Tourism in Tunisia has a knock-on effect on other economic activities such as trade, transport, and crafts. The development of tourism in Tunisia dates to the 1960s thanks to the cooperation between the State and private investors. Since then, the number of accommodation establishments, hotel capacity, international tourist arrivals and the revenue generated has not ceased to increase. For example, hotel capacity has increased from 56,000 beds in 1974 to 237618 beds in 2018 (Fig.1).

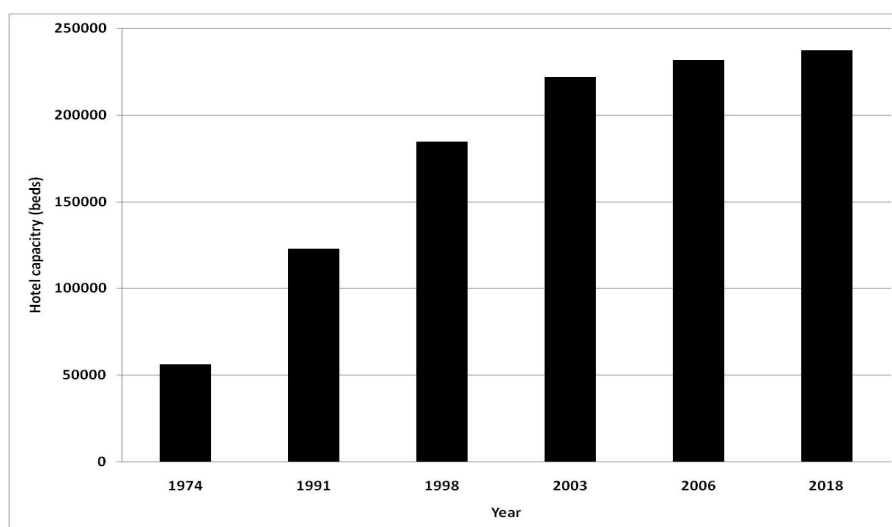


Figure 1. Increasing hotel capacity in Tunisia (ONTT, 2019)

The number of hotel establishments has increased from 692 establishments in 1998 to 868 establishments in 2018 (ONTT, 2019). The numbers of international arrivals as well as the number of tourist nights are subject to acute fluctuations due to the events that the country has experienced since the revolution of January 2011. After the decline in tourist activity in 2011, the following years were marked by political instability and the preponderance of terrorist threats.

Under such a situation, tourism could not rise properly. It was only in 2016, and thanks to the strengthening of security, that the tourist sector experienced a real recovery which lasted until 2018, the year in which the country recorded the entry of 8,299 million international tourists and 21,212 million overnight stays (ONTT, 2019). However, the establishment of a tourist sector was based first on a favorable natural configuration. Indeed, Tunisia has benefited from its geographical position between the two western and eastern basins of the Mediterranean Sea, the length of its coasts and its favorable climate for a perennial tourist activity.

II. Well-Preserved tourist Well-Being

II.1. Favorable characteristics for tourist well-being

Tunisia is characterized by a temperate climate with mild temperatures throughout the year, making it ideal for any tourist activity. Enormous sunshine potential, regulating effect of the Mediterranean Sea on the air temperature in winter and summer and little disturbed weather are among the favorable natural conditions for a permanent tourist activity. The extension of the coastline over nearly 1.300 km to the north and east of the country, with its beautiful and predominantly sandy beaches, has for decades encouraged the State as well as the private capital, to invest in the installation of seaside tourist resorts and offer a product based on three essential elements: sea, sun, and sand. This is why relaxation continued to be the motto of various seaside resorts, based on the 3S model (Sea, Sand and Sun). In addition to these specific climatic characteristics, the wealth of natural and cultural resources is the basis for other sustainable tourism products (ecological and cultural) which magnify the natural diversity and heritage of the country (Fig. 2).

Tunisia, like the entire Mediterranean region, is geographically accessible by all international tourist flows. It is close to the European, African, and Asian markets. Consequently, the inconveniences to the well-being of tourists caused by long journeys only arise very rarely. In addition, the 3S model has been enriched by other services offered by hotels or other leisure facilities in resorts, such as swimming pools, thalassotherapy, amusement parks, golf courses and water sports. This creates a pleasure that sublimates well-being and health as the avowed motives of tourism. The state of well-being is independent on leisure experienced and felt and a sign of health in a consumer society that prefers hedonism (Perreault, 2005).

In sum, and without carrying out an inventory of the tourist products offered in Tunisia and the advantages of relaxation, and a change of scenery offered to tourists, tourist well-being is a major priority and is part of the brand image of tourist activity in the country. This well-being of tourists does not only mean its protection against all threats and physical aggression, but the safeguarding of their health against intoxication and infection.

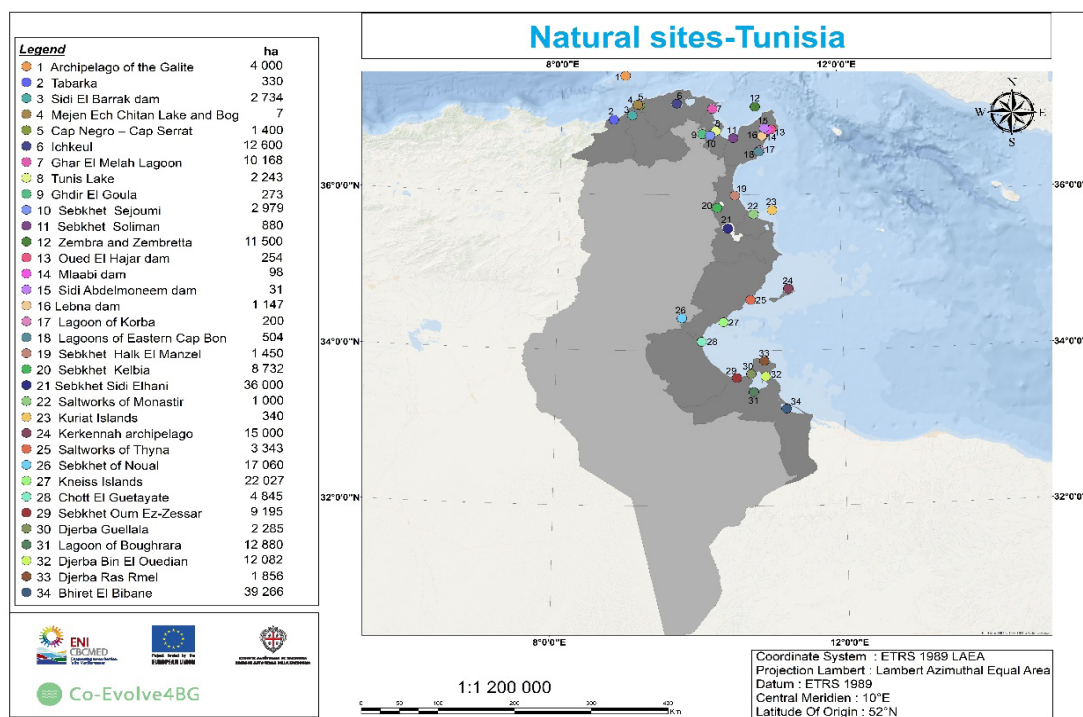


Figure 2. Distribution of Natural sites along the Tunisian coasts

II.2. Towards a generalization of travel medicine

Concerns about a possible deterioration in the well-being or even health of tourists in certain tourist destinations have made it necessary to take drastic precautions before the trip. This is the case for tropical destinations which require specific preparations in terms of medical care before and after the trip. A recent medical specialty has emerged, called travel medicine. It was created in response to the increasing frequency of international travel and health problems, particularly in tropical areas. There are several reasons for the fears towards these areas, such as the weakness or even absence of an efficient sanitary infrastructure and the proliferation of pathogenic agents (viruses, bacteria, fungi, and parasites) favoring the widespread of transmissible diseases. The task of the occupational physician is purely preventive, aiming at safeguarding the health of the traveler through certain measures. These include making travelers aware of the risks incurred in the host country, preparing their trip, especially regarding jet lag and motion sickness, applying certain preventive measures such as vaccination and checking travelers after their return if they show signs of illness (Bouchaudet *al.* 2009).

The existence of such a medical specialty reflects an awareness of the risks to the well-being and health of individuals in some parts of the world. While this approach has been rigorously applied to all intentions to stay in tropical countries, its generalization to all regions of the world is currently proving to be indispensable given the multiplicity of health risks. The appearance of the recent version of the new coronavirus or Covid-19 in Asia, and more precisely in China in 2019 initially imposed a series of restrictions

which have become stricter over time in line with its rapid spread. The closure of country borders for health reasons led to the stopping of travel, including travel for tourism, which was considered a potential vector for the spread of the pandemic. Like all countries of the world, Tunisia has applied bottom-up measures in line with the worsening of the world epidemiological situation by achieving the total closure of borders and general containment.

III. Tourism and health risks: Effects of Covid-19

III.1. An unprecedented pandemic

Before analyzing the pandemic aspects of the coronavirus, it is useful to define it to know its typology and understand its transmission mechanisms. Indeed, coronavirus 2019 or Covid-19 disease (SARS-COV-2) is an infectious disease of viral zoonosis type. It is due to a recent version of coronavirus discovered in China on 17 November 2019. Recalling that the world, particularly East Asia, has experienced two previous coronavirus epidemics in 2000-2003 and 2012 (WHO, 2020). The symptoms of Covid-19 are varied: fever, cough, fatigue and breathing difficulties. In the elderly or chronically ill, more serious symptoms are potentially common, such as acute respiratory distress which can lead to death. The loss of the sense of smell and/or taste is more or less frequent signs of the disease and is considered as indicators of Covid-19 infection (WHO, 2020). Symptoms may appear in the affected subject within an average of 5 days, although it might take up to 15 days for the symptoms to develop.

The spatial extent and rapidity of the spread of the coronavirus throughout the world and, above all, the proven risks it represents for the lives of individuals have placed humanity in an unprecedented dilemma. Indeed, there were no vaccines or specific drugs for this new virus that appeared in China in November 2019. Because of its high contagiousness, the Covid-19 virus has conquered every continent within a few months, and a catastrophic pandemic situation has developed on a global scale. The epidemiological situation has worsened worldwide, particularly in Europe (Italy, France, and Spain), Asia (Iran and India), Latin America (Brazil, Argentina and Colombia) and the United States. This has been seen in the frightening daily increase in the number of infected cases and deaths. Most countries have faced an unprecedented health crisis that has far exceeded the capacity of their health care systems. As of 23 October 2020, the world has registered more than 42 million Covid-19 cases and 1,140,759 million deaths. Today, the United States is the first country most affected by Covid-19 as it has registered 8,498,283 infected cases, 75,064 new cases per day and 223,490 deaths (European Center for Disease Prevention and Control, 2020).

To curb the highly rapid spread of the Covid-19 epidemic, countries successively closed their borders and applied a general containment during the spring of 2020. The economic cost and social impact of such a solution are different and depend on the wealth and resilience of the countries. However, the global economy has been strongly affected and a fall in economic growth was a common feature throughout the world. While developed countries have coped better with the health crisis and its socio-economic fallouts, developing countries have seen their socio-economic situation worsen and threats of total collapse have increased. In Tunisia, the strategic and steering sector, which is tourism, representing in several countries the first source of foreign currency, has been seriously affected. They found in debt a solution to remedy their situation and revive their badly damaged economies.

Following the rapid spread of the epidemic and to limit the contagion and safeguard the lives of tourists and companies, tourist displacement is the first to be stopped in destination countries. In Tunisia, prohibiting the entry of tourists and even their communities residing abroad has been a matter of national security. Under the effect of fear, public opinion was in favor and strongly supportive of such an initiative.

Table 2. Epidemiological situation of Covid-19 in Tunisia and in some Mediterranean countries (23/10/2020) (European Centre for Disease Prevention and control, 2020)

Country	Total number of cases	Number of new cases / day	Total number of deaths
Spain	1,026,281	20,986	34,521
France	1,007,026	41,575	33,939
Italy	465,726	16,078	36,968
Turkey	355,528	2,102	9,584
Morocco	186,731	4,151	3,232
Egypt	106,060	177	6,166
Lebanon	67,027	1,450	552
Tunisia	45,892	1,524	740
Croatia	29,850	1,563	406
Greece	28,216	882	549

Since its first appearance in China in November 2019, the first case of the new coronavirus was discovered on 2 March 2020. Since that date, the virus has spread in the country, which recorded 998 cases in April 2020. However, the government measures applied (*e.g.*, health protocols, border closures, general and targeted containment) were effective in controlling the rate of contamination and succeeded in curbing it on 10 May 2020, when no new cases of Covid-19 were recorded.

The reopening of the borders on 27 June 2020 and the failure of individuals to comply with the rules of prevention have contributed intensely to the resumption of a relentless pace of coronavirus contamination. The number of cases reached 197,373 and 6,234 deaths as of 24 January 2021 in Tunisia (European Center for Disease Prevention and Control, 2020).

The daily number of new cases of Covid-19 as well as the number of people who are still infected is of the order of 6,635 cases registered in the national territory (JHU CSSE COVID-19 Data, 2021). All governorates of the country have been affected by the epidemic, but the distribution of the daily number of Covid-19 cases is characterized by spatial variability. This number varies from 1,044 cases in Gabès to 14 cases in Tozeur (Fig.3).

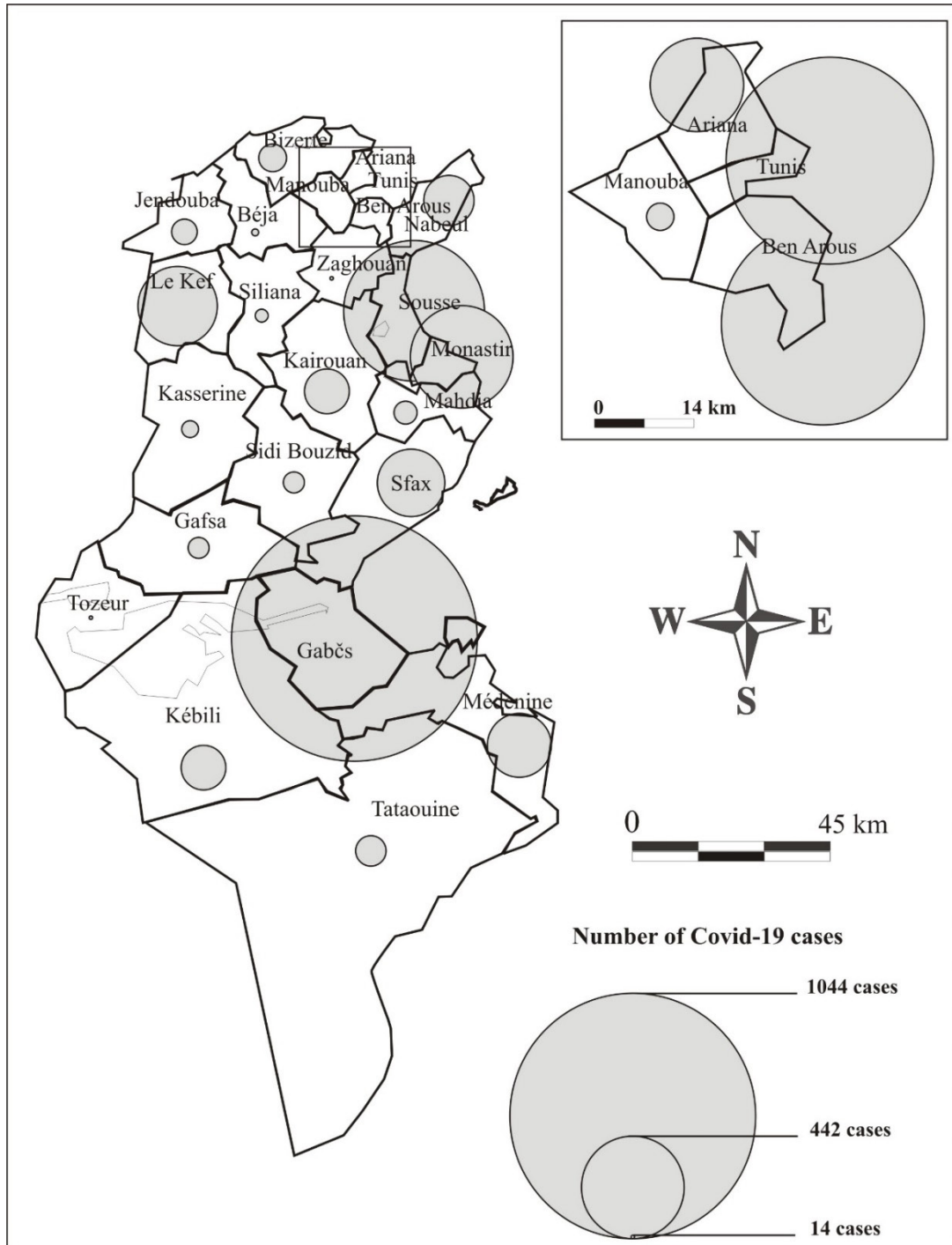


Figure 3. Number of Covid-19 cases registered by governorate in Tunisia, 24 January 2021 (JHU CSSE COVID-19 Data, 2021)

III.2. Proven risks for international tourists

The brutal spread of the Covid-19 virus and the high levels of mortality it has caused around the world have created a state of panic and fear about an invisible and potentially deadly disease. The lack of an effective vaccine or treatment against this re-emerging virus, as well as the media coverage of its news, has heightened feelings of uncertainty and lack of confidence in an ambiguous future. Among the essential determinants of tourist well-being is confidence in a safe and pleasant stay in the destination country. In the absence of such safety and the intensification of risks that may affect the well-being and put the health and lives of tourists at risk, the cancellation of all tourist trips has become a major necessity. This has been seen in the gradual regression of such cancellations and the tightening of restrictions on travel of all types since the appearance of Covid-19.

The closure of borders, the reduction and then cessation of air traffic and the application of general containment in virtually all countries reflect the catastrophic nature of the Covid-19 crisis worldwide. Thousands of deaths registered every day around the world, disrupted health systems unable to respond to the unprecedented rise in demand for intensive care, particularly resuscitation and assisted ventilation and a medical and paramedical corps heavily affected by the corona virus. All these have contributed to a tense and stressful atmosphere for individuals already at home. The pandemic has raised a wealth of uncertainty in all aspects of daily life, including tourism with several questions pertaining to individual health and well-being, including: Given such a situation, would it make sense to continue welcoming tourists? Will tourists from the pandemic countries be carriers of the virus and responsible for widespread contamination in the destination countries? In the event of illness during their tourist stay, will they be covered by insurance companies? And who will guarantee their access to care in countries where the health system suffers from thorny problems, such as in developing countries?

These questions show that the safety of tourists is a major priority, and this is reflected in the evacuation campaigns launched by various governments to repatriate their fellow citizens who have sometimes been stranded in countries where the epidemiological situation has rapidly deteriorated. In many cases, the abrupt halt of air links between countries has put many tourists in difficult situations, spending days stranded in airports (UN, 2020). Under the effect of the rapid collapse of the epidemiological situation in the world, Tunisia experienced a massive departure movement of European tourists who cut their stays short to return to their countries and repatriation campaigns for foreigners who feared being blocked following the closure of the borders of their countries of origin.

IV. General containment and its consequences

Given the high contagiousness of the Covid-19 virus, the scientific medical commission in Tunisia has recommended restrictions on human contact and travel. This decision, which was validated by the governments, was taken after the failure of an initial policy that was based entirely on the conscience, responsibility, and cooperation of the citizens. This first policy was based on a health campaign that recommended certain hygienic measures, physical distancing and the closure of public spaces that were not essential for the lives of the inhabitants. In the face of the epidemic expansion, the morbidity that has accelerated at very high rates and the limited effect of the application of preventive barrier gestures, the announced general containment was the last solution to limit the spread of such a catastrophic pandemic situation. The objective of the general containment is to limit the increase in serious cases and guarantee the continued efficiency of the healthcare system. According to a study established in March 2020, if it will be impossible to keep the population confined for more than 18 months. Thus, the estimated time needed for the discovery of an effective vaccine against Covid-19, a three-month containment accompanied by hygienic measures will be highly useful. Its application will be beneficial in that it will reduce the number of deaths by 50%, reduce the number of infected people by 2/3 and avoid the collapse of the health care system (Ferguson *et al.* 2020).

From mid-March 2020, several Mediterranean countries such as France (17 March 2019), entered a general containment to restrict the movement of populations and slow the rate of contagion by Covid-19. Tunisia announced the general containment on 20 March 2020. This measure means that, with its entry into force, the population must stay at home and leave only for very specific reasons (work, shopping, health, and family emergencies) and avoid gatherings. Individuals who find themselves outside their homes must present the law enforcement authorities with an authorization justifying the need to move.

The detailed consequences of such a measure on the pandemic situation not being the subject of the current report, certain socio-economic impacts on Tunisia, which differ in comparison with some Mediterranean countries, are noteworthy due to the contrasts linked in turn to the highly unbalanced economic power, between the countries on the northern and southern shores of the Mediterranean.

As a result of the Covid-19 pandemic, the world economy has plunged into a serious recession. According to the World Bank forecasts, world GDP will fall by 5.2% in 2020. More than \$12 trillion of losses will be generated by coronavirus and contractions will be suffered by several developed, emerging, and developing countries (www.Banquemonde.fr). The contraction of GDP is enormous in the countries on the northern and southern shores of the Mediterranean in 2020. The fall is staggering for France (-12.5%), Italy and Spain (-12.8%), Turkey (-9.9%), Tunisia (-8%), Morocco (-6.3%) and Lebanon (-12%).

The various economic sectors have been strongly affected by the health crisis and total containment. The air transport sector was the first to suffer heavy losses in terms of passenger numbers and revenues. At the beginning of the crisis, traffic gradually decreased, in particular with travel restrictions until it came to a complete halt with the closure of borders. The IATA has indicated that airlines will lose \$84.3 billion for a net profit margin of -20% in 2020. For each day, these companies were losing \$230 million (www.IATA.org). For example, after a hundred days of suspension of flights in mid-June 2020, the Tunisian airline company “Tunisair” recorded a financial loss of 400 million TND (\$140.9 million). These losses did not consider the costs of keeping aircraft on the ground during the period of suspension of activity (ICAO, 2020). [This situation forced the air company to ask for state aid to cover its expenses and avoid bankruptcy.](#)

Table 3. Falling GDP growth in Tunisia and in Mediterranean tourist countries in 2020
(World Bank, 2020)

Country	GDP growth
France	-12.5%
Spain	-12.8%
Italy	-12.8%
Greece	-8.2%
Turkey	-9.9%
Tunisia	-8%
Morocco	-6.3%
Egypt	-5.6%
Lebanon	-12%

V. Tourism: Challenges and Mitigation Measures

V.1. Declining indicators

A diagnosis of the global and regional situation proves to be indispensable to understand the difficult context in which Tunisian tourism has been plunged under the effect of the universal health crisis linked to the coronavirus. The severe effect of Covid-19 on tourism was manifested by a frightening 93% drop in international tourist arrivals in June 2020 compared to the same month in 2019. According to the UNWTO, international tourist travel decreased by 65% over the period January-June 2020. This resulted in a loss of 440 million international tourist arrivals and a drop in revenue of about USD 460 billion (international tourism exports). This fall in revenue represents five times the losses recorded during the economic and financial crisis of 2009 (OMT, 2020). According to the United Nations Conference on Trade and Development (UNCTAD), the global tourism sector, which accounts for about 330 million jobs (direct and indirect) worldwide, will experience losses of at least \$1.2 trillion by the end of the year 2020, or 1.5% of global GDP (United Nations Conference on Trade and Development, 2020).

This situation characterizes other larger and more powerful Mediterranean airlines. The airline Air France-KLM recorded an unprecedented 83% decline in turnover to €1.182 billion, an operating loss of €1.5 billion and a net loss of €2.6 billion in the second quarter of 2020, as activity was virtually nil in April and May. The number of passengers also fell by 95.6% in the second quarter of 2020 compared with the previous year (Suau-Sanchez *et al.* 2020).

In Tunisia, manufacturing and non-manufacturing industries recorded, in the second half of 2020, a decline of -27% and -20.8%, respectively. Tourism also showed a considerable fall with a rate of -77.5% and transport with a rate of -51.4% in the second half of 2020. Conversely, the agricultural sector recorded growth in the first two semesters of 2020, respectively by 7.1% and 3.6% (INS, 2020).

Despite the gradual de-containment or targeted containment applied in May 2020, the economy has entered a recessionary phase indicating that the repercussions of the health crisis linked to Covid-19 will persist for a significant period of time.

Tunisian tourism has been heavily damaged by the coronavirus pandemic. The massive cancellation of tourist bookings by international clients resulted in a significant drop in the sector's activity indicators. Until September 2020, a fall of 75% in international tourist arrivals, 60% in receipts and 80% in overall overnight stays was recorded in Tunisia. As an example, over the period January-August 2020, the destination Tunisia recorded the entry of 1,661,843 tourists against 6,295,072 tourists during the same period of the year 2019, *i.e.*, a drop of 73.6%. The Central Bank of Tunisia (BCT) has pointed out that tourist receipts recorded up to August 2020 were 1.3 billion dinars against 3.3 billion dinars during the same period of the year 2019 (BCT, 2020). The various figures indicate a disastrous situation that is soon to impact the economic and social life in the country. Moreover, this upheaval in the tourist sector and its various economic repercussions affects all countries on the northern and southern shores of

the Mediterranean basin. Studies of certain aspects of this crisis in certain developed and developing countries are being undertaken to understand the effects of the pandemic on the regional area in which Tunisia is located.

The decline in activity concerns all types of tourism, mass or others. Restrictions on the movement of individuals or even its prohibition in the framework of total containment have contributed to the fall in the visits of tourist regions throughout the world. While the countries on the northern shore of the Mediterranean whose tourism relies on various products (seaside, ecological, cultural, and business) are less vulnerable to the effects of such a fall, the tourist destinations on the southern shore have suffered heavy losses. A predominantly mass tourism sector (especially seaside) is proving vulnerable to such a thorny crisis in the developing countries of the southern shore of the Mediterranean (Karabulut *et al.* 2020).

On a regional level, Europe represents the second most affected region since it recorded a 60% drop in tourist arrivals during the first half of 2020. Africa and the Middle East, many countries of which are Mediterranean, also experienced a 57% drop in their international tourist arrivals. More specifically, Southern Mediterranean Europe has suffered greatly from this fall, recording the second lowest rate of decline (-72%) in the world after North-East Asia (-83%) (OMT, 2020).

The indicators of tourist activity recorded in summer 2020 reflect a catastrophic situation in the Mediterranean countries. In April 2020, the tourist bookings recorded indicate a considerable fall in the countries on the northern shore of the Mediterranean: -57.5% for Italy, -56.7% for Spain, and -54% for France.

In France, tourist consumption has fallen sharply due to the Covid-19 crisis. First, according to the Banque de France, tourist receipts recorded €12.3 billion during the period January-June 2020 against €25.5 billion during the first half of 2019; a fall of 51.9%. Moreover, forecasts of potential losses in overall tourism receipts for the year 2020 are estimated at €50 to €60 billion; a fall of 30% to 35% in annual tourism consumption (OECD, 2020).

In Spain, the world's second largest tourist destination, the forecasts are dramatic for the Spanish tourism sector, according to the international organization Exceltur. In fact, foreseeable losses are estimated at more than 100 billion euros in 2020 because of the Covid-19 pandemic. This means a tragic regression to the level of activity in 1995 (Gil-Alana and Poza, 2020). Another indicator of the seriousness of the crisis in the Spanish tourist sector is the massive sale of thousands of hotels. In fact, the price of a hotel room has fallen considerably from an average of €400,000 before the health crisis to €100,000 in 2020. This collapse has been considered a stock market crash when shares become insignificant in price.

In Italy, the European country open to the Mediterranean, tourism is a vital sector for the Italian economy since it contributes 13% of the country's GDP. Italy was among the first countries to experience the appearance of the coronavirus in Europe, and more precisely in Rome since two Chinese tourists affected by Covid-19 were discovered on 31 January 2020. Since then, the coronavirus spread to Lombardy where 16 confirmed

cases were recorded on 21 February 2020 and 60 other cases were detected the following day, as well as the recording of the first deaths caused by Covid-19 in Italy (De Natale *et al.* 2020). According to a survey by the Centre for Tourist Studies in Florence, carried out among 1975 tourist enterprises, a massive drop (-65.9%) was recorded in the arrivals of international tourists. Moreover, a drop of 65 million overnight stays and a 37.5% drop in turnover were estimated for the summer of 2020 compared to the year 2019 (United Nations Conference on Trade and Development, 2020).

On the southern shore of the Mediterranean, developing countries have seen their economic situation worsen since the onset of the Covid-19 pandemic crisis and with the measures undertaken to deal with it. Certain economies which rely on tourism (Tunisia, Morocco, and Egypt) have suffered greatly because of the weakness of tourist receipts. According to the ADB, the coronavirus pandemic will be at the origin of losses which vary between \$10.6 billion and \$21.1 billion at the level of receipts in the tourist destinations in North Africa (Tunisia, Morocco, and Egypt). In Morocco, the tourism sector has been severely impacted by the coronavirus crisis. Losses have reached 18.3 billion dirhams over the period January-July 2020, a regression of 44.1% at the level of tourist receipts according to the Directorate of Financial Studies and Forecasts (DEPF). According to this same Directorate, the foreseeable drop for the year 2020 is 69% for international tourist arrivals, 60% for foreign exchange earnings and 50% for jobs. For example, the fall in tourist receipts is of the order of 90.1% in July 2020 and arrivals and nights spent in classified accommodation establishments have fallen by 63.5% and 59.1% respectively in June 2020 (Boumahdjet *et al.* 2020). In Egypt, the coronavirus pandemic has strongly impacted the tourism sector. Against 13 million international tourists registered in 2019, the number of tourist arrivals is estimated at 3.4 million in 2020, *i.e.*, a fall of 73.5%. The drop in tourism receipts is estimated at 72.6% between 2019 and 2020. Losses in Egyptian tourism have been estimated at \$1 billion each month and three million people working in the sector are strongly threatened by an uncertain future (Breisinger *et al.* 2020).

From this analysis of the regional situation, it appears that no country was spared from the impacts of the Covid-19 health crisis on tourism. Tunisia is not the only country which is strongly impacted by an unprecedented crisis which has upset developed economies and tourist destinations occupying the first ranks in the world (France and Spain). However, the repercussions of such a crisis on the tourist sector and the economy in general are much more serious in Tunisia and other countries on the southern shore of the Mediterranean than elsewhere.

V.2. Various difficulties

The general indicators quoted above show the difficult situation experienced by the tourism sectors. In this part, through examples, certain aspects were analyzed illustrating the difficulties and which finally help to understand the seriousness of the coronavirus pandemic on an activity which was booming in Tunisia as in certain Mediterranean tourist countries.

Given the economic fragility of the tourist countries on the southern shore of the Mediterranean, the difficulties encountered are multiple, hampering any possible revival of tourist activity. In Tunisia, the overall fall in international arrivals is of the order of -87.7%. It is considerable at the level of the classic European tourist market: the French (-65%), the German (-89.3%), the Italian (-87%) and the English (-94.5%; Fig.3).

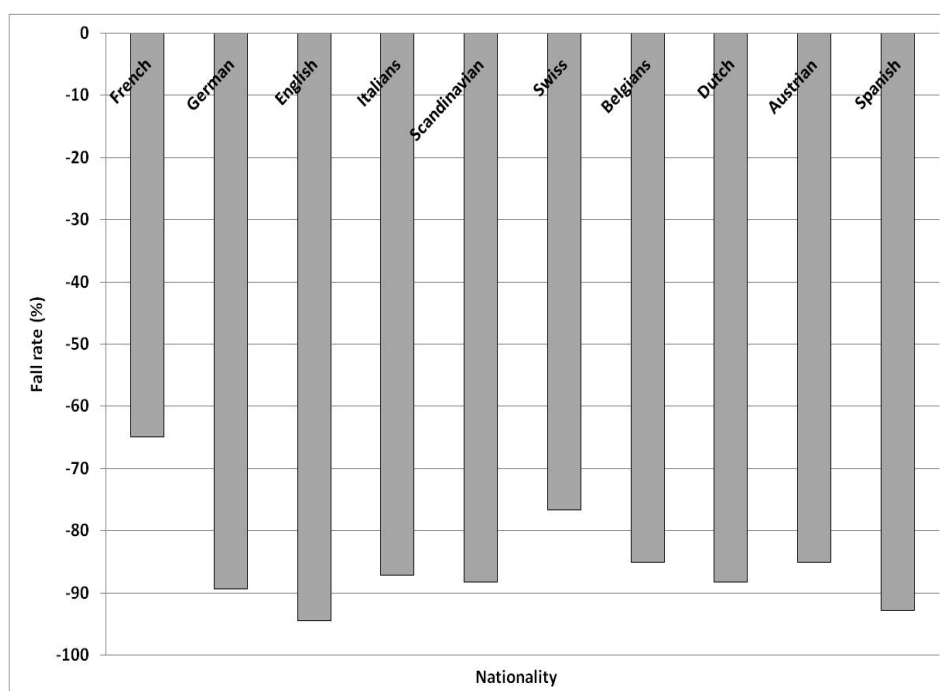


Figure 4. The fall (%) of European arrivals by nationality between 2019 and 2020 (ONTT, 2021)

The Maghreb market has also recorded a strong overall drop (-90%), particularly among the Algerians (-99.8) and the Libyans (-66%; Table 4). This drop in tourist numbers had repercussions on the players in the Tunisian tourist industry. A survey by the Quantylix firm, conducted over the period of 22-27 June 2020 among members of the Interprofessional Federation of Tunisian Tourism (Fi2T), measured the impacts of the pandemic during and after the containment.

Table 4. The fall in Maghreb arrivals in Tunisia according to nationality between 2019 and 2020 (ONTT, 2021)

	2019	2020	Fall rate (%)
Algerians	444,309	878	-99.8
Libyans	180,954	61,735	-66
Moroccan	6,262	550	-91.2
Mauritanians	1,512	583	-61.4
Total	633,037	63,746	-90

First, the average loss of turnover was estimated at 83% during containment. After the containment, the sector sacrificed 32% of its workforce. Establishments in difficulty made an average of 71% of their staff redundant, 80% of the staff working in the thalassotherapy centers made redundant, travel agencies made 50% of their staff redundant, while 70% of members continued their activities with negative cash flow and flagrant debt. According to these members, the forecasts for a rapid recovery are pessimistic since 89% of companies estimate that this crisis will last for months and may last up to a year (PNUD, 2020).

According to the Fi2T, the risk of bankruptcy of hundreds of tourist businesses has been growing, because they can no longer bear the losses and expenses due to a lack of income. This concerns hotels, restaurants, travel agencies, craftsmen, professional guides, car rental agencies, among others. The social repercussions of such a situation are also heavy since tens of thousands of employees in the sector find themselves unemployed.

Given the economic similarities from the point of view of the strategic importance of the tourist sector between, on the one hand, Tunisia and, on the other hand, Morocco and Egypt, analysis of the aspects of the fall of an important source of foreign currency and a major component of GDP are useful. In Morocco, there is no lack of signs of deterioration in tourism. The fall in international tourist arrivals has put 3,500 tourist accommodation companies, 500 restaurants, 1,450 travel agencies, 1,500 tourist transport companies and 1,500 car rental companies in an unprecedented crisis. The president of the Hotel Industry Association of Casablanca and Region (AIH) has affirmed the closure of nearly 90% of hotels by mid-April 2020 in the Casablanca-Settat region (OECD, 2020). The impact of the pandemic crisis is expected to be very severe for the country. Official estimates predict the loss of nearly 10 million tourists in 2020. This represents a very heavy blow for a sector generating, in addition to the direct jobs in the hotel and catering sector, two million indirect jobs such as craftsmen, suppliers, guides, taxi drivers and thousands of informal workers. For example, in Marrakech, the tourism capital, looks like a dead city. After a record year 2019 in terms of international tourist arrivals with 13 million tourists visiting Marrakech and Agadir, the city of Marrakech, deprived of its many visitors, is today suffering from socio-economic upsets. Several aspects show it: restaurants are closed and the square of Jeema-El-Fna, which is usually saturated with tourists, is now deserted (Boumahdjet *al.* 2020).

In Egypt, 11% of the GDP depends on tourism, which is why the blow is hard for the Egyptian economy. The impacts of the coronavirus pandemic are heavy on the tourist sector which risks collapsing: all reservations were cancelled, and all the hotels were closed. Estimates of the losses caused by the Covid-19 pandemic are of the order of €4.4 billion in 2020. The seaside resorts situated on the Red Sea and the Mediterranean have been deserted under the effect of the absence of the tourists. The world's most famous archaeological sites such as the pyramids of Giza, the temple of Karnak or the tomb of Tutankhamun have also been closed. In addition to the precariousness of the salaried, contract and seasonal employees of the sector, the indirect jobs (transport, handicrafts, guiding) as well as the informal workers (photographer, seller of souvenir

articles, trainers) who live entirely on the money spent by tourists during their visits to tourist sites, have become without income. The coronavirus has strongly affected the Nile River cruise activity. The occupation on the boats sailing between the cities of Luxor and Aswan has fallen sharply. In February, it was 90%, but when the first cases of Covid-19 (45 cases) were discovered on board one of the ships, occupation had dropped to 10% due to flight cancellations and reservations and thus the absence of foreign customers (OECD, 2020).

On the other northern shores of the Mediterranean, the aspects of the collapse were multiple. The financial losses were enormous and the repercussions on employment were catastrophic. Certain aspects of this collapse could be analyzed through examples from France, Italy, and Spain to determine the extent of the health crisis linked to Covid-19, in a developed economic context different from that of Tunisia. In France, the number of visitors recorded in June 2020 was very low. Indeed, 5.8 million overnight stays were spent, which represented a 73% drop in hotel occupancy in June 2020. Nights spent by residents recorded a drop of 61% compared to June 2019. During the containment period in April and May 2020, the number of hotels remaining open was limited. They were frequented by certain specific categories of people: confined persons, those staying for social reasons, staff working in the public health sector, and people whose professions require them to stay in hotels such as road agents and law enforcement officers. During these two months of containment, hotel occupancy represented 4% and 8% of that recorded in April and May 2019, respectively (INSEE, 2020). The French top-of-the-range hotels (4- and 5-star categories) have recorded a massive loss of clientele. Indeed, the number of overnight stays fell by 83% between June 2020 and June 2019. These hotels, which represented 27% of the total number of overnight stays in June 2019, only participated by 17% in June 2020. In the Côte d'Azur region, the turnover of tourist activities has fallen by 46% and the total shortfall in terms of tourist receipts is estimated at €2.5 billion in 2020. In Paris, the number of visitors to the Eiffel Tower has fallen by 80% compared to 2019 and the turnover by 70%. The loss was heavy since 2,500 sightseers visit this monument, even though it can accommodate 25,000 visitors a day (Folinas and Metaxas, 2020).

In Italy, the most severe consequences of the coronavirus pandemic hit the employment sector, since 1.3 million jobs in the tourism were threatened. During the first six months of 2020, 80% for seasonal employment contracts and 60% for fixed-term contracts were cancelled. From March to May 2020, several hotels were able to remain open, but due to the absence of customers, many had to close. The fragility of employment is reflected in the fact that 40.2% of employees in the tourism sector are temporary or seasonal contract workers. It is therefore certain that these categories of employees will become vulnerable to the effects of the Covid-19 crisis since they will be the first to lose their jobs (Camilli, 2020). Another activity, the cruise industry, which is of major importance in the Italian tourism sector, has been heavily hit by the coronavirus crisis. Italy had suspended its cruises in March due to the rapid spread of Covid-19. According to the International Association of Cruise Lines, the cruise industry is worth €14.5 billion and provides 53,000 jobs in Italy. The suspension of the cruise activity was mandatory

in the face of the massive contamination of passengers by coronavirus on board international ships that were stuck at sea because the local authorities in Japan, the United States and Italy decided to prohibit them from docking in their ports.

In Spain, which is the second largest tourist destination in the world, the hotel and catering sector has received a severe blow because of the coronavirus pandemic. Such a sector, which represents 6% of GDP and 9% of employment, has suffered devastating effects from the health crisis. This can be seen in the permanent closure of nearly 13% of hotel and catering establishments, *i.e.*, 40000 cafés, bars, restaurants, and hotels. It is estimated that 65000 establishments, *i.e.*, 20% of the total workforce, are expected to close. The repercussions of such a situation are serious on employment, since between 900,000 and 1.1 million direct and indirect jobs are threatened by the fall in demand for hotels and restaurants. July and August were disastrous for Spain, since the number of international arrivals plummeted by 75% and 76%, respectively, according to the National Statistics Institute (Perles-Ribes *et al.* 2020).

VI. Deserted seaside resorts in summer 2020

VI.1. Aspects of crisis

Although they form part of the brand image of tourist destinations in the Mediterranean and have beneficial effects on the well-being of tourists, the seaside resorts could not resist the effects of the Covid-19 pandemic. As a result of the state of panic that accompanied the rapid spread of the coronavirus epidemic around the world, individuals planning to make tourist stays in one of the Mediterranean destinations in the summer cancelled their reservations. This cancellation movement was massive and had particularly affected countries on the southern shore of the Mediterranean with fragile economies. The closure of borders and fears of a possible spillover of the pandemic situation have led to seaside resorts marked by low numbers of international tourists.

The seaside resorts on the southern shore of the Mediterranean have suffered greatly from the absence of international tourists. Despite the opening of the borders and the gradual resumption of air links at the beginning of the summer season in June 2020, at least the closest (European) emitting markets have retreated. Thus, the Europeans have appeared cautious about travelling to and staying in one of the seaside destinations in North Africa. This is explained by fears of a dubious virus that can cause death. As a result, almost all foreign customers of beach tourism have preferred to stay at home and spend their summer holidays in their own countries. In Tunisia, the hoteliers in the various seaside resorts of Hammamet, Djerba and Sousse speak of “zero foreign reservations” and “zero foreign tourists”. They pointed out that the usual clients from France, Germany, Italy, Belgium, and Switzerland who are attracted by Tunisia did not come this season. They also added that most of the resorts in 2019 were overbooked. They attributed this catastrophic recession to the effects of the Covid-19 pandemic, but also to the failure to revive the sector that began with the reopening of borders on 27 June 2020. They pointed out that Tunisia’s success in controlling the coronavirus epidemic had no positive effects on the marketing of Tunisia as a safe and secure tourist destination. It was expected that tourists would “conquer” the seaside resorts during the summer season of 2020, but it appeared that this Tunisian success in the domain of the fight against the coronavirus was not enough to incite the foreign players in tourism to renew confidence in Tunisia as a destination. Here, the tour operators did not take the risk of transporting tourists to Tunisia and other Arab and African destinations, also considering the increase in insurance.

The aspects showing the crisis caused by the Covid-19 pandemic in Tunisian seaside resorts are multiple. In the seaside area of Skanes-Monastir, the definitive closure of the hotels or because of the low season or the health crisis had the effect of reducing the capacity put into operation to 6386 beds, 25.3% of the total capacity in March 2020. During the coronavirus crisis, closed hotels were transferred to Covid-19 centers to accommodate patients and expat citizens subject to compulsory containment (Hellaï, 2020). The crisis that has hit seaside tourism in the resort of Skanes-Monastir is manifested in the collapse of occupancy rates in hotels compared to the figures recorded in 2019. Indeed, the occupancy rate dropped from -0.8% in March to -8.3% in May and -101% in July (ONTT, 2021).

In the seaside resort of Hammamet, many hotels were closed, and other units were converted into bars. Some hotels operating thanks to local tourism have reduced up to 60% of their staff, sacrificing animation programs and stopping the extension and renovation work initiated on the eve of the coronavirus pandemic (Khazamiet *al.* 2020). Thus, the impact of such a difficult context has been extensive on the employees in the tourist sector as well as the neighborhood activities such as catering, trade, and transportation which collapsed due to the absence of foreign customers.

The situation in Morocco and Egypt did not differ from that of Tunisia from the point of view of the notable absence of the foreign tourist clientele and its impacts on the operation of the seaside resorts. The revival of the tourist sector in these countries after the de-containment was very slow in such a way as to miss the summer season (the months of July and August). Summer is the high season and the pillar of seaside tourism, in the southern shores of the Mediterranean.

If the tourist countries on the southern shores of the Mediterranean have suffered greatly from the absence of tourists during the high summer season, the tourist resorts on the northern shore have experienced low foreign visits; a phenomenon which confirms the universal scale of the health crisis. Despite the progressive de-containment, the French Mediterranean coast, whether in Nice, Cannes, Palavas-les-Flots or Argelès-sur-Mer, has experienced a predominantly local visitors controlled by a series of preventive measures. The reopening of beaches in French seaside resorts was cautious, gradually easing the restrictions and evaluating the results in each region. However, the low level of international tourist arrivals in French, Italian and Spanish seaside resorts has strongly influenced the local economic dynamism in these regions. In the Côte d'Azur, the indicators recorded in July-August show the seriousness of the crisis. First, there was a loss of income of €600 million and a reduction of nearly 50% in the number of tourists stays (6 million tourist stays in summer 2020 against 12 million in summer 2019). As a result of the absence of international clientele, hotels and tourist residences have seen their occupancy rates fall to 68% and 78% respectively (*i.e.*, -15% and -7%, respectively, compared with the period July-August 2019). Average visitor spending also fell by 13% in July-August to €63 (INSEE, 2020). In Corsica, despite the gradual resumption of air and sea traffic on the island in June 2020, the flow of travelers remained very low, with less than 25% of the June 2019 volume. This weakness in terms of tourist frequentation had a heavy impact on tourist accommodation and catering. This sector, the usual driving force behind employment growth, recorded the greatest loss (-5.7%) with 570 jobs lost. The closure of hotels was prolonged and the establishments that kept their doors open recorded low occupancy rates in June 2020 (INSEE, 2020).

In the Spanish archipelago of the Balearic Islands, calm prevails on the island of Ibiza, which is usually lively with famous music groups and “Discs Jockey” (DJs) from different parts of the world. It should be remembered that tourism is the main pillar of the local economy on the island of Ibiza, accounting for 90% of the GDP. Even if the Balearic archipelago is little affected by the coronavirus pandemic, the quarantine applied by the United Kingdom since the end of July 2020 on tourists returning from Spain, has strongly aborted the signs of recovery of tourist activity in summer. The structures of

the hotel and restaurant business as well as the activities indirectly linked to tourism (transport, guiding and trade) were plunged into an unprecedented crisis due to the fall in tourist demand. The United Kingdom is not the only country to have imposed restrictions on travel to Spain. Belgium has recommended to its citizens to avoid non-essential travel to Spanish Mediterranean regions such as Barcelona, Lleida, and Valencia (Couto *et al.* 2020).

Table 5. Evolution of the occupancy rate between 2019 and 2020 in the hotels opened in the seaside resort of Skanes-Monastir in Tunisia (ONTT, 2021)

Country	Date of reopening of the borders
France	01 July 2020
Greece	01 July 2020
Italy	03 June 2020
Spain	01 July 2020
Tunisia	27 June 2020
Morocco	06 September 2020
Egypt	01 July 2020

VI.2. Some rescue attempts

VI.2.1. The de-containment and associated stimulus measures

As the world's leading tourist region, the Mediterranean has seen the opening of borders gradually in line with the notable deceleration in the spread of coronavirus and the relative improvement in the pandemic situation at the beginning of the summer season. Always considered as host and holiday destinations, the Mediterranean countries were the first to reopen the borders and resume activity. In the countries on the southern shore as well as the other countries on the northern shore, the reopening of borders was essential after more than two months of containment. This is to remedy the catastrophic economic situation and the lack of visibility regarding the persistence of the Covid-19 pandemic, especially with the absence of a specific vaccine and/or treatment. De-containment was therefore inevitable and cohabitation with the coronavirus became the slogan of this phase that was marked by a fierce race in the search for an effective vaccine to prevent humanity from this virus. The de-containment was, indeed, much more urgent to avoid economic collapse in the developing tourist countries on the southern shore of the Mediterranean. These countries were already in a fragile economic situation before the occurrence of the Covid-19 pandemic.

Tunisia, which was only slightly affected by the coronavirus pandemic, wanted to exploit its image as a safe destination to save the tourist season in summer 2020. The control

of the coronavirus pandemic and the improvement of the health situation have earned Tunisia the confidence of the WHO and the WTO, which have enabled tourists to travel to the country where the risk of contamination was very minimal. However, the measures aimed at consolidating the resilience of the tourism sector in the face of the health crisis began on the eve of the declaration of general containment. In March 2020, the government devoted a support fund of 500 million dinars to prevent the collapse of the tourism sector. However, for various and sometimes unknown reasons, the professionals of the tourist sector have expressed their dissatisfaction and anger because of the delay in releasing this fund. A delay which they considered catastrophic for their businesses and the jobs it generates. Other measures have been taken for the payment of contributions to social security funds by granting extensions as well as the postponement of the payment of monthly instalments on their loans to banks. Moreover, the preparation for the opening of borders on 27 June 2020 for the reception of tourists and Tunisians residing abroad has materialized by the regular revision of the classification of countries according to the risk of the spread of the Covid-19 epidemic (red = high risk; orange = medium risk; green = low risk) and the elaboration of a specific health protocol for Tunisian anti-Covid-19 tourism. The relevant document was prepared by the ONTT and experts from the Ministry of Public Health. From 04 June 2020, the resumption of tourist activity stipulated a rigorous compliance with the 250 measures published in this health protocol, which is binding to all players, including hotels, tourist restaurants, travel agencies and entertainment centers. This protocol was published in French and English and recommended all measures that must be applied to guarantee the safety of visitors. For hotels, the control of the temperature of resident tourists and employees on a regular basis, the reduction of the hotel occupancy rate to 50% of the accommodation capacity to avoid congestion and to respect the principle of distance in common areas such as restaurants, swimming pools and beaches were among the recommended measures. The protocols insisted on the obligation to devote isolation rooms for suspicious cases in each hotel establishment as well as a space for disinfecting luggage. The measures also included those concerning common areas which should be cleaned and disinfected intensively and rooms which should also be disinfected and left unoccupied for 48 hours (Ministère de Tourisme, 2020). In the same context of preparing for the resumption of tourist activity, the national airline Tunisair has presented its ability to ensure safe flights by complying with the required protection and prevention standards, operating with a load factor not exceeding 40% of aircraft to combat contamination on board. To revitalize the tourist sector, and in line with the lifting of travel restrictions between governorates, Tunisair Express has resumed its activity with the scheduling of two daily Tunis-Djerba flights and two weekly Tunis-Tozeur flights.

Despite the elaboration of the health protocols, the opening of the borders, and the advertising campaign of the Tunisian tourist potential and the safety of this Mediterranean destination to reassure the foreign clientele, the various tourist resorts have not recorded the expected foreign visitors. The crisis in the sector has persisted and worsened with the fall in tourist receipts of 27% in May 2020 and 47% at the end of June 2020 compared with May and June 2019. Since the reopening of the borders, tourist bookings became rare and the few flights from France, Italy and Switzerland became very limited

to allow a real expected recovery. Faced with this situation, it is the local tourism that has become the focus to remedy the toll of the heavy losses.

Keeping the borders closed and prolonging the general containment for a long period has been detrimental to countries whatever their economic power. The planned de-containment and reopening of Tunisia, a small country with modest resources, has been legitimated to save its economy and benefit from its success in controlling the pandemic situation. Other European countries do not have resisted the repercussions of the health crisis despite their more comfortable economic situation before the pandemic. Some aspects showing the efforts to revive a stricken sector in some tourist countries on the northern shore of the Mediterranean were analyzed.

On 3 June 2020, Italy, which has recorded the heaviest loss of human life with more than 33,000 deaths in three months due to Covid-19, opened its borders after a month of de-containment to save its economy from a catastrophic fate. Given the importance of the tourist sector, which represents 15% of the GDP in this country on the northern shore of the Mediterranean, the de-containment and then the opening of the borders had the urgent objective of reactivating tourism and taking advantage of the summer season to guarantee a good recovery. That is why all the Italian airports and ports have been opened and European citizens do not have to pay the fees of quarantine when entering Italy. International flights have resumed in Venice, Florence and Naples and have been speeding up in Rome and Milan. This reopening of international borders was accompanied by the return of free movement between the 20 Italian regions; a measure eagerly waited for by the inhabitants that led to road congestion, airport congestion (e.g., when boarding and leaving Sicily) as well as railway congestion (e.g., rail stations of Milan and Rome). While these measures directly influenced freedom of movement for the native population and foreign visitors, others were taken to boost a tourism sector in a state of recession. The Italian government reacted quickly at the beginning of the crisis by granting financial aid to the tourism sector through the suspension of social security payments, tax levies for all companies and access to the guarantee fund for small businesses to support them in dealing with liquidity problems (UNCTD, 2020).

Moreover, while Italy has taken the initiative to open its borders, its neighboring countries have appeared skeptical about such a step. Their doubt was justified by the fact that they are concerned about a possible resumption of the pandemic from Lombardy, the European center for the spread of coronavirus. This is why Switzerland and Austria have kept their borders closed with Italy, which has expressed its dissatisfaction with such a decision. However, Italy has been pushing for its bordering countries to open their borders to save its strangled tourism. Despite this effort, Italian tourist cities were empty of international tourists; this forced the government to address citizens by encouraging them financially to spend their holidays in Italy (Uzumer and Ghosh, 2020).

Heavily affected by the Covid-19 pandemic (more than 26,000 deaths by June 2020), Spain, as the world's second largest tourist destination, opened its borders to international tourists on 1 July 2020. Representing 12% of the country's GDP, the resumption of tourism was a major priority for the Spanish authorities because of the catastrophic damage caused by the suspension of activity since March 2020. Despite

state aid and support for professionals in the tourism sector, marketing campaigns for a safe destination to reassure customers and the introduction of drastic health protocols, Spain has not been able to guarantee a rapid recovery of the tourism sector. In this effort to reassure foreign tourist clients, the Spanish hotel group Room Mate offered to systematically test its clients free of charge in Madrid and Barcelona, the regions that suffered the most serious damage to hotel infrastructure. Guests were tested as soon as they arrived at the hotel and then every three days in the event of an extended stay. The number of tourists was below expectations, since in August 2020, Spain recorded the arrival of 2.4 million international tourists, down 75.4% compared to August 2019. Tourists were first and foremost from France's neighbors, who made up 34.4% of the total number of tourists, but who recorded a fall of 57.2% compared to August 2019. Next were tourists from Germany and the United Kingdom, whose numbers fell by 73.6% and 88.2%, respectively (Rodriguez-Anton and Alonso-Almeida, 2020).

In France, the preparation for the opening of the borders on 15 June 2020 was preceded by the development of a plan to support the tourist sector, which was heavily damaged by the Covid-19 pandemic. Three areas were the subject of this plan, namely health measures and visitor safety, material support for businesses linked to tourism, sporting, and cultural events by granting a budget of €18 billion and by the preparation of a contract for the revival and transformation of tourism. Up to mid-May 2020, the tourism sector has benefited from €1.26 billion in state-guaranteed loans. Despite the measures taken to help the sector cope with the repercussions of the Covid-19 pandemic crisis, the massive cancellations of bookings and the loss of income during the spring period have strongly influenced the financial stability of the millions of professionals who have been in uncertainty since mid-March 2020. New measures aimed at supporting the tourist industry have been taken and have revolved around the authorization of partial activity for tourism and event companies until the end of 2020, access to the solidarity fund for tourist café, hotel and restaurant businesses and its extension until the end of September 2020, the stimulation of demand by increasing the daily ceiling for restaurant tickets from 19 to €38 and their authorization also during weekends, holidays and until the end of 2020. Regarding employers' social security contributions, the exemption for tourist businesses has been extended in line with their closure (Marques Santos *et al.* 2020).

The reopening of the French borders was cautious and gradual. It concerned the European neighbors except for Spain and the United Kingdom. To prevent any possible contaminations linked to the visits of Spanish and British tourists, the French authorities have planned for them to stay in France for about 14 days before entering the French territory. For other countries outside the Schengen area, the crossing of French borders was authorized from 1 July 2020. In view of the worsening pandemic situation, in several countries, and to anticipate a possible relapse in France, the State has requested from 1 August 2020 for air passengers from certain countries such as Brazil, India, Algeria, Madagascar, Turkey, Peru and Qatar to present the results of a PCR test carried out less than 72 hours before the flight.

VI.2.2. Other alternatives: local tourism in time

Faced with an unprecedented situation, caused by a dangerous virus, the tourist sector in the Mediterranean countries, particularly on the southern shore, has collapsed. As a source of foreign currency for developing countries, any health- or geopolitical event hindering the attendance of international tourist risks plunging their economies into a thorny crisis. Faced with the recession in international tourism, the Mediterranean tourist countries, each according to the severity of their losses, considered alternatives with the goal of saving their tourism sectors from collapse.

In the developing countries on the southern shore of the Mediterranean, the alternatives applied were diversified according to the context of each country and its way of dealing with the Covid-19. The ADB has estimated the losses in tourism due to the coronavirus pandemic at between \$10.6 billion and \$21.1 billion in tourism revenues in North African countries. In Tunisia, preparations for the reopening of the borders were preceded by the adoption of measures to ease entry into the country. The National Observatory for New and Emerging Diseases has been responsible for monitoring the pandemic situation in the world in terms of spread of the coronavirus, and for drawing up a list, regularly updated every week, of countries that have completed the mandatory quarantine period and have begun to open their borders. This ranking was based on internationally available and approved scientific and epidemiological standards published on the website of the Ministry of Public Health. The classification adopted divides the countries into two groups: the first group (green color), with a low prevalence of the pandemic and therefore people from these countries are not subject to special preventive measures. The second group (orange color), with a medium epidemic and therefore individuals are compulsorily requested to undergo a laboratory analysis (RT-PCR) 72 hours prior to travel providing that the date on which the analysis is carried out does not exceed 120 hours on arrival. The measures for entry into Tunisia are described as light and flexible since, for example, France, which has had a heavy toll in terms of the number of cases and deaths caused by Covid-19, has been classified as a green zone. This means that Tunisians residing in France as well as French tourists can enter Tunisia without being checked at the borders and during their stay in Tunisia. This measure has been designed to attract international customers.

The massive cancellation of reservations for foreign tourists' stays in Tunisia during the spring and their rarity after the opening of the borders in the summer, as well as the reduced number of flights by registered tourists have enabled local tourism to be counted on as a lifeline for a severely disaster-stricken sector. The old experiences show that local or domestic tourism was the life jacket of the tourist sector which suffered from the repercussions of exogenous factors (*e.g.*, revolutions and terrorist attacks). Usually, Maghreb tourism and in particular tourists from Algeria come to the rescue in the event of a recession in the European market. However, the overflow of the pandemic situation in Algeria and the continued closure of its borders with Tunisia aggravated the situation of Tunisian tourism in summer 2020 (Madani *et al.* 2020). The 4- and 5-star hotels in Hammamet, Sousse and Monastir or even Djerba adopted attractive prices starting from 44 dinars per night on half board in the high season. Such

offers were unimaginable even in normal situations and intended to attract Tunisians to spend their holidays in hotels despite the risks of Covid-19 contamination. The TFTA has underlined the importance of the flow of Tunisian tourists and their role in the crisis phases when it announced that certain hotel units, particularly in Djerba and Sousse, were fully booked thanks to domestic tourism. Some professionals in the sector considered that tourism was partly saved by local tourism. Moreover, two facts put this positive contribution of local tourism into perspective to save the tourist season in Tunisia. The first consisted in the fact that Tunisians usually represent only 20% of the total number of tourists. In 2020 several Tunisian families have seen their income and days off melt away during the containment of spring and therefore it was impossible for them to spend their holidays in hotels. The second lied in the fact that hotels in several tourist resorts in Hammamet, Djerba and Sousse have preferred to close their doors and caused the loss of hundreds of jobs instead of welcoming Tunisian tourists. This is justified by the fact that the 20% share of local tourism is very small and does not cover the hotelkeepers' expenses.

Knowledge of the measures undertaken in other Mediterranean tourist countries is very useful to better judge the relevance of that applied in Tunisia in terms of promoting local tourism to alleviate an already difficult situation.

In Morocco, the context of the revival of tourism was different from that of Tunisia. The pandemic situation was more complicated in Morocco and the coronavirus has spread rapidly in the kingdom. After a slackening of the rhythm of the contamination during the period June to July, several large Moroccan cities such as Marrakech, Tangiers and Casablanca have been re-contained to combat the deterioration of the pandemic situation and the outbreak of contamination by Covid-19. This re-containment was drastic with extreme measures such as banning people from moving outside their homes (except for extreme necessity), quarantining certain neighborhoods with a high rate of coronavirus contamination, closing beaches, implementing serious restrictions (restricting the duration of opening hours) for restaurants, cafés, shops, and public parks. These measures have been aimed at containing the contamination that threatens to collapse the capacity of health facilities. All this happened in August 2020 and meant that the summer season is over for the Moroccan seaside tourist resorts (Bouanani El Idrissi and Ladraa, 2020).

The reopening of the borders was late, since 06 September 2020, but under conditions, such as the presentation of a hotel reservation and a negative PCR test carried out 48 before departure, for tourists wishing to enter the Moroccan territory. Countries which constituted the main emitting markets for tourists in Morocco were France, Germany, Italy, Portugal, Canada, the United States and Turkey. This conditioned reopening reflects the warning policy applied by the State which intended to control a fragile pandemic situation. Furthermore, a preparation for the reopening of tourist accommodation structures to the reception of international tourists has been undertaken by the launch by the Moroccan Ministry of Tourism of the "Welcome Safely" label. The objective of the launch of this label was to maintain the competitiveness of the tourist sector in the context of the world coronavirus pandemic. It defines the recommendations

which should be respected by tourist accommodation establishments. This label aims at the prevention and management of the risk of contamination and the maintenance of confidence in the destination Morocco. The granting of the “Welcome Safely” label to tourist establishments was carried out based on respect for the health safety framework and staff training (Berriane, 2020).

The program contract for the revival of tourist activity 2020-2022 aimed at boosting the tourism sector in the post-Covid-19 phase. This program-contract, which was signed on 6 August 2020, has been drawn up by public and private players and includes 21 measures which will enable the tourist sector to preserve the economic fabric, reduce the weight of the informal sector, stimulate investment, and lay the foundations for a sustainable transformation of Moroccan tourism. The introduction of this program, which presents the main lines of the post-coronavirus tourism policy, is considered recognition of the reduced room for maneuver for a resumption of activity in summer 2020. The pandemic situation has not improved in the summer 2020, and several Moroccan cities have re-contained themselves which means that Morocco has turned the page on the tourist year 2020.

In Egypt, tourism has been strongly impacted by the coronavirus pandemic. This was manifested by the fall in international tourist arrivals and revenues in 2020. Flights to and from Egypt were suspended on 19 March 2020. Other measures have been taken, such as the closure of hotels, restaurants, and cafés, which have led to the complete cessation of tourism-related activities. Egypt was preparing for the delicate decision of reopening of borders on 01 July 2020 to save its badly affected economy and in particular its stricken tourist sector. Indeed, as of 21 June 2020, the number of people infected by Covid-19 reached 55233 cases and the number of deaths was of the order of 2193 cases. Doubts and criticisms have been expressed about these figures, which have been widely accused of underestimating the health reality, since Egypt, with a population of more than 104 million and a weak health system, must have registered levels of morbidity and mortality caused by Covid-19 much higher than the published data (UN, 2020).

Concerning the measures aimed at the revival of tourist activity, they were of early interest to local tourism. This type of tourism has been able to resume since mid-May 2020 in certain Egyptian regions and under certain drastic conditions. Tourists were authorized to stay in certified hotels. Out of the 178 hotels that have requested reopening, only 73 have been authorized. The permitted occupancy rate does not exceed 25% of total capacity. This state-sanctioned occupancy rate increased to 50% in July 2020. To take advantage of the summer season to support tourist activity, it was decided to reopen the Red Sea and Mediterranean Sea resorts to the west of Alexandria, followed by the opening of the pyramids of Giza, the temple of Karnak and the tomb of Tutankhamun. A rule has been implemented for entry to these archaeological sites which minimizes the number of visitors to 10 people at a time (UN Egypt, 2020). Hotels have taken sanitary measures such as the provision of masks and disinfectant gels, regular disinfection of common areas and the use of 50% of the capacity of the lifts. Egypt will count on the expected support of a structure which is currently being finalized

and which will consolidate its tourist product. Although its inauguration at the end of 2020 has been postponed, the tourism sector will see the opening next year of the Grand Egyptian Museum (GEM) which is situated near the pyramids of Giza. This museum will be an asset for Egyptian tourism and should attract curious tourists and cultural tourism enthusiasts.

With households less affected by the effects of the health crisis and the sanctification of the tradition of going on summer holidays, local tourism is taking on another dimension in the countries on the northern shore of the Mediterranean. A great surge of solidarity with the tourist sector is presented by European companies. The analyses of certain aspects show certain peculiarities, which differ from the Tunisian context.

In France, if the absence of the international clientele could not have been compensated for, alternatives have been adopted to minimize the loss of earnings. Following a strong promotion campaign of France as a safe destination, France inaugurated on 19 June 2020 the tourist season with the main slogan “This summer, I’m visiting France”. A campaign and a slogan, resulting from a strong mobilization of the local market, have finally led to a significant proportion of the French tourists, as much as 94%, spending their holidays on their territory (INSEE, 2020). This is mainly based on the diversity of the French tourist product since almost all the domestic destinations have attracted customers for various potentialities such as nature, new spaces, and leisure activities. According to the INSEE, the number of overnight stays recorded in July 2020 was comparable to that of June 2019, whether in classic accommodation (e.g., hotels, campsites, tourist residences and holiday villages) or specific accommodation (e.g., second homes, with family or friends). This is explained by the increase in the number of nights spent in specific types of accommodation, which increased significantly from 60 million nights in July to more than 105 million nights in August 2020 (INSEE, 2020).

All in all, outdoor activities, coastal and rural destinations have attracted tourists. It should also be noted that this health crisis has contributed to a change in behavior towards local frequentation, the choice of short stays, last-minute bookings, and the search for wide open spaces. The offer of diversified accommodation was an asset, since tourists went to homes, guest houses and furnished establishments. Finally, the arrival of tourists from Germany, Belgium and the Netherlands contributed to the creation of certain dynamism for the French tourist areas.

French departments were part of a campaign to save the tourist industry. They have implemented several measures aimed at attracting tourists by refunding part of their stay or by offering holiday vouchers that can be used in tourist structures (hotels and restaurants) and activities in their territory. The purpose of these allowances was to encourage individuals to spend more than expected. The amounts are different and vary from €50 in the Bouches-du-Rhône to €100 in Charente and €150 in the Lands. Within this same framework of support for local tourism, from 1 July 2020, 1,100 accommodation providers in Doubs have distributed 150,000 “Doubs tickets” to their customers. This ticket offers either free access to the 16 partner tourist sites (e.g., Parc Dino-Zoo and Musée Courbet), or a discount on an activity or a boat trip. To attract customers who are keen on short stays, Doubs Tourism has adapted its “Doubs

Séjours” offer. Until 31 December 2020, 300 all-inclusive packages at €80 for two people have been put on sale. They included one night’s accommodation (in bed and breakfast formula at hotels and holiday village, bed, and breakfast), evening meals, breakfasts, and visits to two tourist sites of your choice. In Roanne, certain conditions must be met to benefit from the “Destination Roanne” offer set up by Roannais Agglomeration: stay at least two consecutive nights in tourist accommodation, have a meal in a traditional restaurant and justify at least €200 of expenditure during a stay between 04 July and 30 August 2020. The subsidy is around 50% of the expenses, *i.e.*, within the limit of €100 reserved (UNWTO, 2020).

In the same context of encouraging domestic tourism, Italy has financially supported this alternative aimed at alleviating the tragic impacts of the coronavirus crisis on the tourism sector. In fact, the Italian government has implemented a financial aid called “Holiday Bonus”, aimed at families with an annual income of less than €40 k to encourage Italians to spend their holidays in their country. This allowance varies according to the number of people in the family: a person living alone receives €150 while a couple receives €300, and a large family receives €500. The holiday bonus was valid until 31 December 2020 and for all types of tourist accommodation. To finance this measure, the Italian state has released €2.4 billion (Marques Santos *et al.* 2020). Certainly, this measure will not compensate for the enormous losses of tourism professionals but has helped to ensure the minimum of activities in summer.

In Spain, a survey of extra-hotel occupancy revealed that attendance at specific tourist accommodation facilities was high, and that the Spanish population was widely aware of the critical state of the tourism sector in their country, the reason why Spanish citizens preferred to spend their holidays in their own country. The diversity of the tourist products in their country encouraged them to make this choice. The high demand for non-hotel accommodation (tourist flats, campsites, rural tourism accommodation and youth hostels) was reflected in the increase in their number from 127,553 establishments in July to 141,372 establishments in August 2020. However, this number is 30% lower than that recorded in August 2019. More than 3 million travelers, 87% of whom were residents of Spain, stayed in non-hotel accommodation in August. They spent 14.7 million nights there, 41.8% less than in August 2019. Campsites were the most popular type of accommodation in August 2020, with over 1.5 million travelers and more than 550 million passengers in Catalonia. On the other hand, rural tourism establishments have recorded the highest occupancy rates. More than 75% of the accommodation rooms located on the Gipuzkoa coast, in the Oyambre nature reserve, in the Picos de Europa National Park and the Costa Verde, were occupied. The number of nights spent by Spanish women in this type of rural accommodation has increased by 6.8% compared to August 2019. In terms of tourist flats, almost one million people occupied them. The highest occupancy rates were recorded in the north of the country, in Cantabria, the Principado de Asturias. In the period January-August 2020, accommodation in tourist flats recorded 40.9 million overnight stays, 56.4% less than in the same period in 2019 (Moreno *et al.* 2020).

Among the solutions followed by some Spanish hotel chains was the search for alternative lines of business to try to relatively compensate for the spectacular drop in the number of customers. These hotels have taken advantage of the boom in teleworking to make their rooms and other facilities available as “day offices” to guests. The aim was to attract workers who could not have gotten to the office, those who were housebound and needed a quiet place during the day to work, without having to share space with others in large rooms and coworking, thus avoiding the risk of being infected with coronavirus.

Table 6. Date of reopening of the borders of Mediterranean tourist countries

Country	Date of reopening of the borders
France	01 July 2020
Greece	01 July 2020
Italy	03 June 2020
Spain	01 July 2020
Tunisia	27 June 2020
Morocco	06 September 2020
Egypt	01 July 2020

VII. Prospects for the development of Tunisian tourism in the light of the lessons learned for the Coronavirus crisis

The crisis caused by the coronavirus, which has strongly impacted the world economy, has shown certain aspects of the fragility of the Mediterranean tourist sector. Mass beach tourism, particularly in the developing countries of the southern shore, was proven to be vulnerable not only to geopolitical factors, but also to health disasters. This is the example of Morocco, Egypt and above all Tunisia which have invested heavily in the seaside tourism since their independence. Conversely, the countries which have diversified their tourist sector have been able to withstand, to a certain degree, the disastrous effects of the Covid-19 pandemic and limit their losses. Concentrating tourists in hotels and on beaches without respecting the distance is highly risky and accentuates the contagion. However, the diversification of tourist regions in a country and the authentic products offered (*e.g.*, nature, leisure, and culture) to international or local tourists help minimize the risks of the collapse of a tourist sector based on a single product which is the seaside resort. France has succeeded in lightening the balance sheet of its losses in terms of tourist receipts by mobilizing its population to frequent its innumerable tourist regions with their different products and save the sector from a thorny crisis. In this case, local tourism has created an important dynamism in the different regions, but this has been favored by a wealth of tourist products and the encouragement of local actors. In Tunisia, the rescue by means of local tourism has targeted exclusively the seaside resorts. In the absence of a foreign clientele, local tourists will replace it to generate income. The fate of potential tourism and its associated activities, such as natural, rural, cultural, or have remained largely unaccounted for in building a strategic national diversified tourism. It is time for Tunisia to leave the hegemony of the seaside resort to allow a permanent and non-seasonal activity of its tourism. Several regions await the enhancement of their natural and cultural potential, as well as their integration into the present tourist circuits and the creation of others. The projects are numerous, and the support of the State has been insufficient in developing and improving the logistics and transportation infrastructures in several regions of the country.

Among the lessons learned from the Covid-19 crisis is the change in the tourist behavior of individuals. Such a change was imposed by a dangerous virus that limited the freedom of movement of individuals between countries. Local tourism became the refuge to unwind after months of containment at home. A great opportunity for the discovery of new products and original experiences, such as campsites, guest houses and self-catering cottages, has presented itself and could offer an alternative to the hegemony of hotel establishments and seaside resorts that are sometimes isolated. Well-being could be better sought after in open and natural spaces.

Finally, the resumption of tourist activity will depend exclusively on the improvement of the pandemic situation, at local, national, regional, and global scales. Travel restrictions will persist for regions at high risk of contamination. The severe impacts of the health crisis make it necessary to reflect on new ways of maintaining the resilience of the tourist sector, in Tunisia and in the Mediterranean in general, to limit the socio-economic repercussions. Thinking about investing in sustainable tourism products and making them accessible to all social categories (domestic tourism) would offer an alternative route for the recovery of the tourism sector in Tunisia.

VIII. Conclusions

Tunisia is of the world's leading tourist destination. This means the advantages of the geographical location and the opening onto the Mediterranean basin, which presents itself as a tourist haven, in relation to the crossing of the tourist flows of departure and arrival. Tunisia has invested a lot in tourism since its independence. This has become a strategic sector which generates foreign currency and boosts economic life. Tourism is a hinge sector of other economic sectors in the country. In 2019, tourism almost recorded the number of international arrivals reached in 2010, the reference year for assessing the state of tourism in a country which has experienced a general context of disruption during the decade 2010-2020. Although the coronavirus pandemic has strongly paralyzed the world, it could represent an opportunity to boost the Tunisian tourism and the economy in general.

The health crisis of Covid-19 proved that seaside tourism, which dominates the tourism in the Mediterranean basin in general, especially in the case of Tunisia, is a product that is very vulnerable to crises. The containment procedures have been catastrophic for the tourism sector, including but not limited to the closure of tourist structures, the management difficulties, the indebtedness, and the rise in unemployment. A success at the level of the interception of the first wave of the coronavirus epidemic during the first half of the year 2020 has not enabled Tunisian tourism to attract foreign customers once again. The balance sheet of losses is heavy according to the indicators of tourist activity and the figures communicated by the Central Bank of Tunisia. The analyses show that the tourist sector remains very fragile in the face of crises, especially health crises. The reopening of the borders and the adoption of a health protocol have not changed the situation if travel applicants are not reassured. All the newspapers linked to tourism, air transport, catering have recorded alarming falls in visitor numbers.

However, the analyses of the tourist situation in the countries on the northern shore of the Mediterranean show that other sustainable tourist products are proving to be less affected by the effects of the Covid-19 pandemic. Rural tourism sectors have recorded in Spain, for example, an increase of 6%, if social distancing imposed by Covid-19 was respected. Thus, this confirms the need to diversify the Tunisian tourist product by exploiting the natural and cultural potentialities of the various regions of the country to maintain the resilience of the sector in the face of this unprecedented universal crisis.

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