Post Covid-19 Tourism: Promoting the Holy Family Trail as a Niche Religious Tourism Destination/
الترويج ل مسار العائلة: COVID-السياحة بعد 19 المقدسة كوجهة للسياحة الدينية

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A Policy Paper

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June 2021
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“The opinions in the paper are those of the authors and do not reflect AUC policies or views. They are published to stimulate further dialogue on issues and challenges facing Egypt in an attempt to expose graduate students to practical policy solutions.”
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<th>Abbreviation</th>
<th>Description</th>
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<tbody>
<tr>
<td>CBT</td>
<td>Community-Based Tourism</td>
</tr>
<tr>
<td>GoE</td>
<td>Government of Egypt</td>
</tr>
<tr>
<td>HFT</td>
<td>Holy Family Trail</td>
</tr>
<tr>
<td>MICE</td>
<td>Meetings, Incentives, Conferencing and Exhibitions</td>
</tr>
<tr>
<td>MoETE</td>
<td>Ministry of Education and Technical Education</td>
</tr>
<tr>
<td>MoLD</td>
<td>Ministry of Local Development</td>
</tr>
<tr>
<td>MoPED</td>
<td>Ministry of Planning and Economic Development</td>
</tr>
<tr>
<td>MoTA</td>
<td>Ministry of Tourism and Antiquities</td>
</tr>
<tr>
<td>OBG</td>
<td>Oxford Business Group</td>
</tr>
<tr>
<td>OECD</td>
<td>Organization of Economic Cooperation and Development</td>
</tr>
<tr>
<td>TALCM</td>
<td>Tourism Area Life Cycle Model</td>
</tr>
<tr>
<td>TTCI</td>
<td>Travel and Tourism Competitiveness Index</td>
</tr>
<tr>
<td>TVET</td>
<td>Technical Vocational Education and Training</td>
</tr>
<tr>
<td>UE</td>
<td>Upper Egypt</td>
</tr>
<tr>
<td>WTTC</td>
<td>World Tourism and Travel Council</td>
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</table>
The tourism sector constitutes a significant importance for the Egyptian economy, with a contribution of 11.9% to the GDP and a total employment of 2.49 million in 2018. The sector comprises different tourism segments including both mass tourism and niche tourism, where Egypt is heavily dependent on the former. Over the past years, the sector was hit by different internal and external shocks that left the sector struggling with instabilities in its revenues, and hence a decline in foreign currency reserves. In addition, COVID-19 has introduced a new global norm that hinders the mobility of mass tourist groups and the functionality of the sector as it used to be.

In light of that, there is a need to shift orientation towards a niche tourism sector based on Butler’s (1980) Tourism Area Life Cycle Model (TALCM). The religious tourism sector was identified as a potential niche segment since it has been the focus of the government over the past 5 years. The Holy Family Trail (HFT) is selected as the unique product of focus given Robinson and Novelli’s (2005) approach for niche tourism product prioritization.

The promotion and development of the Holy Family Trail must primarily address the structural challenges in the sector, mainly the lack of sufficient tourism services such as accommodation and transportation outside the touristic cities. In addition, it should also focus on the re-orientation of marketing of Egypt as a religious tourism destination with targeted marketing towards Christian pilgrims to promote the HFT.

Building on the current and past policies adopted by the Egyptian government to promote the HFT, 3 policy alternatives were suggested and assessed based on economic and technical criteria. The 3 policy alternatives are:

1. **Introducing the Holy Family Trail as a “product destination”**
2. **Introducing the Holy Family Trail as a “culturally meaningful destination”**
3. **Introducing the Holy Family Trail as a ‘place’s narrative’**

The culturally meaningful destination is recommended as the most fitting policy framework since it would address the particularly unique nature of the destinations across the selected areas in UE across the HFT and appeal to the target audience of spiritual devotees among Christian pilgrims worldwide. The reason behind the selection of this model is the belief that tourism should be reintroduced as a full-fledged package that aims at introducing tourists not only with the tangible heritage of the place they visit, but also with the intangible one behind its foundation.

A set of policies under this framework is proposed and an implementation plan outlining the recommended policy option is suggested, where objective indicators, milestones, key activities, a suggested timeline, and relevant stakeholders are presented.

### 1. Overview of the Egyptian Tourism Sector

Egypt has been a tourism destination since the pharaonic era, where travel for educational and recreational purposes by privileged families have been documented (Gyr, 2010). However, the 19th century marked the main factors for the development of tourism as an economic sector in Egypt (Novelli, 2020). These factors included the discovery of the Rosetta Stone (Hagar Rasheed) and the publishing of Description of Egypt Encyclopedia.

The 19th century as well witnessed the early seeds of organized tourism in Egypt, with the promotion of transit tourism through constructing the “Overland Route” in 1840, a mail delivery route between India and England that passes through Egypt (Novelli, 2020). The same period has witnessed an increase in special facilities for tourists, which include Turkish baths and hotels.
In addition, the 19th century witnessed the shift of tourism from a western phenomenon to a Middle Eastern one with the launching of Thomas Cook & Sons excursions, the first mass tourism and travel agency (Hunter, 2004). This resulted in an increase in the number of tourists, as they organized tours for the wealthy and upper middle classes, and the number of tourists doubled to reach 67,772 tourists in 1872 (Novelli, 2020).

During the 20th century, the sector continued to develop with the promotion of different products of cultural tourism despite the different interruptions between 1952 and 1973. The last 50 years have witnessed the evolution of the tourism sector as we know it today. This started with the establishment of the Ministry of Tourism and Antiquities (MoTA) in 1964 followed by providing it with full control over the tourism sector in 1973 (Gray, 1998). In 1975, the ease of visa restrictions was introduced for different western countries. In 1976, the tourism sector became central for the government of Egypt (GoE), where 12% of the national budget was allocated for the development of the sector with a focus on related services and infrastructure. The 1980s and 1990s witnessed the development of beach tourism in Egypt and the involvement of the private sector in investments in the sector in general and Sinai Peninsula in particular (Gray, 1998).

Between 1992 and 2007, 557 tourist projects with a total investment of EGP 9.7 billion were established. In 2006, the GoE started a tourism development program extending till 2011 with the aim of attracting EGP 8 billion investments in the sectors and it launched “Gift of the Sun Campaign”. The payoff of these efforts accumulated, and the sector reached its peak in 2010, where international arrivals reached 14.7 million in 2010. (Index mundi, n.d.).

Post 2010, the sector has experienced different shocks that left it struggling to recover to its peak point. This policy paper addresses the challenges of the tourism sector accumulating over the past 10 years with the objective of proposing policy solutions that also factor for the new world post COVID-19.

1. Overview of the Egyptian Tourism Sector

1.1 The Significance of the Tourism Sector to the National Economy

The tourism sector constitutes a significant importance to the Egyptian Economy; the sector contributed 9.3% to the country’s GDP and 26.2% to its total exports in 2018 (WTTC, 2020). Moreover, it represents a main source of employment and foreign currency.

It is one of the most labor-intensive sectors in the economy, as it employs a labor population of about 2.49 million, representing 9.7% percent of the total employment in all sectors (WTTC, 2020). In addition, it constitutes the third largest source of foreign currency for the national economy after remittances and non-oil exports (OECD, 2020).
1. Overview of the Egyptian Tourism Sector

The significance of the tourism sector to the national economy is reflected by its rising direct and overall contribution to both employment and GDP indicated in figures 1 and 2, respectively.

1.2 The Tourism Sector Supply and Demand Side Analysis

1.2.1 The Tourism Sector Supply Side Analysis: Mass Tourism Vs. Niche Tourism

The Egyptian tourism sector has a diversified portfolio of different tourism segments targeting both mass and niche tourism sectors. This includes recreational tourism, cultural tourism, eco-based tourism, community-based tourism (CBT), religious tourism, health tourism, gastro-tourism, sports tourism and MICE tourism, which stands for meetings, incentive, conventions and exhibitions tourism.

Both recreational and cultural tourism, characterized by tour groups and all-inclusive packages, constitute the mass tourism sector in Egypt. Recreational tourism is based on beach resorts across the Red Sea and Mediterranean in addition to Nile Cruises. Cultural tourism, on the other hand, is based on the archaeological sites in Cairo, Luxor and Aswan.

The other segments constitute the niche tourism sector, an umbrella term that refers to different types and forms of tourism that are done in small groups, as opposed to mass tourism (Stainton, 2020, November 9). Eco-based tourism has developed since the 1980s, where it is based on 13 different natural reserves in Egypt. CBT has become a global millennial trend, where it is based on the involvement of local community, particularly rural ones, to ensure the tourism benefits outreach to locals. CBT is developing across Sinai, Giza and Minya.

Religious tourism is associated with pilgrimage trips and sacred sites seeing. It has mainly been exercised as part of cultural tourism sightseeing since Egypt hosts various Islamic, Christian and Jewish archaeological sites. In addition to that, Egypt possesses different scared sites that place it as a destination for pilgrimage and worship purposes, such as the Holy Family Trail “HFT”.

1 Eco tourism destinations include: the Ras Muhammad Reserve, Nabq Reserve, St. Catherine Reserve, Taba Reserve in Sinai, Jabal Elba Reserve in Halayeb, Wadi Elhitan and Wadi El Rayan and Lake Qarun in Fayoum, Elba Protected Area in Halayeb, Petrified Forest in Cairo, Alexandria Aquarium, etc. (Elnagar & Derbali, 2020).
Health Tourism is associated with both medical and wellness tourism. Egypt has several internationally accredited hospitals and clinics that provide medical treatment at affordable prices compared to other destinations (EG-GATE, n.a.a). In addition, the ecological environment in Egypt attracts many tourists who come to enjoy mineral water springs and sand dunes that treat incurable skin and rheumatic diseases. The estimated number of springs all over Egypt reached 1356, in addition to deserts and oases areas (SIS, 2017, March 23).

Gastro Tourism is a form of niche tourism that involves experiencing local food either as the main purpose of the journey or at least among its main components. This tourism segment is not yet full-fledged. However, some individualistic efforts emerged including “Bellies En-Route” a culinary tourism start-up, “Visit Badrashin” a development program/initiative and “Cairo Bites” which is one of the biggest food festivals (Elmoghazy & Omar, 2016).

Sports tourism is associated with big sports events, where the segment boomed over the last 3 years as Egypt hosted 7 international sports events in 2019 alone. Similarly, MICE tourism is associated with international business events and cultural festivals, where different events have been hosted over the past 5 years. More detailed description of the different niche tourism segments and their current development status in Egypt is provided in Appendix 1.

Despite the presence of different forms of niche tourism that can be offered, the sector is biased towards mass tourism since it has proven to be more rewarding. Such bias is reflected through the different marketing campaigns such as “This is Egypt” and “People to People”, where they focus on the mainstream tourism segments and address the profile of organized mass tourists. However, it is worth noting that there is a lack of published statistics on niche vs. mass tourism consumption in Egypt to support this argument.

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2 The African Cup of Nations for football, the World Squash Cup, as well as the World Cup for Diving, the Beach Volleyball World Cup, the Junior Women Volleyball Championship, the Mediterranean Handball Championship, and finally the Arab Golf Championship (Masrawy, 2019, June 20).

3 This includes Cairo International ICT Conference, Luxor African Film Festival, Cairo International Film Festival, World Youth Forums, Egypt Economic Development Conference.
Niche tourism is an umbrella term that refers to different types and forms of tourism that are done in small groups, as opposed to mass tourism (Stainton, 2020, November 9).

**Niche tourism is usually contrasted with mass tourism in different aspects:**

- **Organization of the travel:** Niche tourism leans towards supporting solo travel, whereas mass tourism is usually large-scale group organized holidays that gather large numbers of people together in one place at the same time for recreational purposes (Naumov & Green, 2015).

- **Saturation level of a travel’s destination:** Stainton (2020, November 9) pointed out that a tourist destination could be considered as a niche as long as it does not attract too many tourists that can have negative implications on the site by over tourism.

- **Psychographic typology of tourists:** whether they are driven towards discovering novel places and trends (Venturers) or merely spending leisure time in traditional formats and activities (Dependables) (Plog, 2001).

- **Nature of a tourist attraction:** niche tourism compromises many diversified activities that range from eco-based tourism, community-based tourism, rural tourism, zorbing tourism (referring to risky sports activities), dark tourism (referring to attractions related to ancient tombs), etc. Each of these types seems to appeal to specific types of individuals with specific interests, needs, desires and priorities. Mass tourism, on the contrary, is affiliated with traditional recreational activities that usually attract a wide range of individuals (Marson, 2011).

According to an interview with a sector expert, the total revenues of mass tourism segments is usually higher than the niche segments as mass tourists outnumber niche ones. However, the sustainability of such an approach is questionable given the current COVID-19 situation. Moreover, there is an untapped potential for Egypt to expand at least two segments of its niche tourism given the rising demand. On one hand, global medical tourism is expected to grow up to $273.72 billion by 2027, especially amid COVID-19 (Allied Market Research, 2020). On the other hand, 450 million tourists travelled for religious and faith purposes accounting for 1/3 of global tourists’ movements in 2018 (CBI, 2020).

### 1.2.2 Demand Analysis: International Vs. Domestic Tourists

The demand side of tourism sector is represented by both international and domestic tourists. While international tourists constitute the main source of revenues and foreign currency, domestic tourists have always been the haven for the tourism sector in times of crises and when international flights refrained from Egypt.
1. Overview of the Egyptian Tourism Sector

The international demand on Egyptian tourism is dominated by European countries, which account for 61% of total tourists coming to Egypt. This share is led by Germany, Russia, the UK, and Italy. In the second place comes the Arab countries (27%), followed by other countries (8%), then the USA (4%) (CAPMAS, 2019; ECES, 2020). Prior to the 2016 Russian plane crash, Russia had the lion share of tourism arrivals in Egypt as indicated in figure 3, where they accounted for almost 25% of visitors. Russia was followed by Germany and the UK. Post 2016, the scene has changed and become dominated by Germany, followed by Ukraine and Saudi Arabia. Comparing 2014 and 2018 international arrivals, both Russia and the UK shares significantly declined, falling by 95% and 50%, respectively.

As for the domestic tourism flow, it exhibited a steady increase in the tourists’ flow reaching 2 million tourists in 2015, as shown in figure 4. Nevertheless, there is a potential for growth in the domestic tourism market share. Although the development of domestic tourism does not substitute for international tourism, its development constitutes a resilient safety net for the sector that can provide the stability for employment and income generation during shocks and crises.

![Figure 3: Number of arrivals in thousands by top 7 nationalities 2014-2018; Source: Constructed by Author based on UNWTO Database](image)

![Figure 4: Domestic Tourists flow (2015-2010). Source (MoLD, 2020)](image)
1. Overview of the Egyptian Tourism Sector

1.3 The Tourism Sector Structural Challenges

According to the Travel and Tourism Competitiveness Index (TTCI), the Egyptian tourism sector faces structural challenges in multiple aspects. Egypt is lagging behind most countries in some crucial aspects of the industry as shown in figure 5. For instance, Egypt's rank lies in the last quartile in international openness dimension (124) and safety and security dimension (112). In addition, Egypt occupies a relatively poor rank in some other important dimensions such as tourist services infrastructure (95), health and hygiene (90), human resource and labor (89), ICT readiness (86) and business environment (70).

There is a lack of sufficient infrastructure for serving tourists except for cities that are classified by the government as tourism-based. For instance, Egypt has the second highest number of major hotels in Africa. Nonetheless, some governorates in Upper Egypt (UE) have less than 10 functioning tourism accommodations. This is mainly because they are not classified by the government as tourist-destination cities despite possessing touristic sites and attractions that are not commonly known or promoted (ULDEP, 2020). For instance, there is a huge disparity between the number and categories of hotels in governorates like Qena and Minya compared to Luxor and Aswan, as indicated in the below table.

---

4 TTCI benchmarks the travel and tourism competitiveness of 140 economies and measures “the set of factors and policies that enable the sustainable development of the Travel & Tourism (T&T) sector, which in turn, contributes to the development and competitiveness of a country” (TTCI, 2019, P. IX). The index assesses the factors and policies that enhance the competitiveness of the sector in a country. This is done through the examination of 3 sub-indices: regulatory framework, business environment and infrastructure and human, cultural, and natural resources subindex. These frameworks measure Policy rules and regulations, Environmental sustainability, safety and security, Health and hygiene, Prioritization of travel & tourism, Air transport infrastructure, Ground transport infrastructure, Tourism infrastructure, ICT infrastructure, Price competitiveness in the T&T industry, Human resources, Affinity for travel & tourism, Natural resources, and Cultural resources (TTCI, 2019).

5 The quartile measurement is based on dividing the 140 countries into 4 quartiles per dimension, so each quartile has 35 countries ranked ascendingly according to their scores.
Moreover, there is a persistent skill gap between the labor supply, represented by TVET and demanded skills by the labor market. This gap impacts the quality of services that tourists experience in the country and affects the overall experience. Additionally, the business environment for the tourism sector in Egypt is complicated, with dispersion of some of the main tourists’ services provided through the informal sector and the ununified regulatory framework for regulating these services (ILO, 2019).

### 1.4 The Egyptian Tourism Sector Resilience

Over the period (1995-2019), the Egyptian tourism sector witnessed many internal and external crises that negatively impacted its performance. As indicated in figure 6, the tourism sector exhibited positive annual growth rates unless a crisis, internal or external, happened. Both internal and external crises did not seem to have a long-term negative impact on the sector, validated by the positive growth rate of both measures in the year that directly follows each crisis. Except for COVID-19, internal shocks tended to have a stronger impact on the sector than external ones. For instance, the decline in the growth rate of total arrivals ranged from 12.8% to 27.3% for internal shocks, referred to in the grey color in figure 6, while it ranged from 2.33% to 2.87% for external shocks, referred to in red (UNWTO, 2020a).

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*For instance, there is a dual regulatory framework governing the restaurants in Egypt, where one is regulated only by the MoTA in terms of license and quality control, while the other is regulated by the governorate in terms of licensing and Ministry of Health and Ministry of Supplies for quality control. This example is also valid in the case of hotels (ILO, 2019).*

*Tourism performance is estimated by the total international arrivals and total expenditure spent within the country by international tourists.*

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**Table 1: Comparison between the Number of Accommodations Lodging across UE in 2015. Source: (MoLD, 2020)**

<table>
<thead>
<tr>
<th>Classification</th>
<th>Qena</th>
<th>Sohag</th>
<th>Assiut</th>
<th>Minya</th>
<th>Aswan</th>
<th>Luxor</th>
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<td></td>
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<td>Beds</td>
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<td>0</td>
<td>0</td>
<td>445</td>
<td>1,190</td>
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<tr>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>327</td>
<td>605</td>
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<td>501</td>
<td>26</td>
<td>54</td>
<td>238</td>
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<tr>
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<td>80</td>
<td>40</td>
<td>71</td>
<td>40</td>
<td>92</td>
</tr>
<tr>
<td>1-star</td>
<td>60</td>
<td>120</td>
<td>0</td>
<td>0</td>
<td>239</td>
<td>515</td>
</tr>
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<td>Local &amp; under evaluation</td>
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<td>397</td>
<td>341</td>
<td>654</td>
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<td>768</td>
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<tr>
<td>TOTAL</td>
<td>239</td>
<td>517</td>
<td>421</td>
<td>847</td>
<td>621</td>
<td>1269</td>
</tr>
</tbody>
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Post COVID19- Tourism: Promoting the Holy Family Trail as a Niche Religious Tourism Destination
The resilience of the tourism sector can be attributed to the sector being a priority for the GoE, given its strategic importance to the economy. Different policies and reform programs were adopted since the mid-1970s when Egypt became an open economy. Until the late 1990s, most policies were addressed toward industry development. Since the 1997 Luxor massacre, policies have been diverted not only towards addressing the industry development but also towards crisis management to address the internal and external shocks of the sector. Until 2010, the implemented policies have shown effectiveness reflected by the increase in tourists' number from 5.1 million visitors in 2000 to almost 14.7 million in 2010, the peak of the tourism sector in Egypt (Index mundi, n.d).

The implemented policies during these 10 years have mainly focused on the promotion of Egypt as a mass tourism destination for leisure tourism with a focus on beach and cultural tourism. The promotion efforts relied on direct marketing by having direct tourism attaché offices in different Egyptian embassies and consulates around the world. This is in addition to the participation of tourism agencies and operators in international tourism exhibitions to directly access mass tourists. Moreover, attracting FDI to touristic destinations to support infrastructure development was among the main tools adopted by the GoE.

After 2010, a shift in policies approach was required to meet up the challenge imposed by 3 internal shocks in a span of 5 years (2011-2016) in addition to the rising global competition from different tourist destinations. Such policy programs, adopted by the Ministry of Tourism and Antiquities (MoTA), focused on addressing the structural challenges in the sector and repositioning Egypt on the global tourism map.

Such focuses were reflected on “Egypt Mid Term Development Plan (2018-2022)” and “The Egyptian Tourism Structural Reform Program”. The former rested upon five main pillars to revive tourism: enhancement of the quality of tourism products, diversification of tourism products beyond beach and cultural tourism, expansion and appealing to different markets, skills development, and increasing awareness of the importance of maintaining tourism hubs and locations (MoPED, n.d.).
The latter rested upon institutional reforms, legislative reforms, promotion and marketing, infrastructure, tourism development, and adopting global tourism trends (MoTA, September 2019).

These policies paid off as Egypt’s TTCI rank improved considerably from 85 in 2013 to 65 in 2019 (out of 140 countries). This improvement makes Egypt occupy the 6th rank among the MENA region (out of 15 countries) and the 1st rank among the North African countries. Egypt has its highest rank in price competitiveness (3), followed by cultural resources and business travel (22), then in prioritization of travel and environmental sustainability (31 each) (WEF, 2019).

Despite such improvements, the number of tourists’ arrival has not yet recovered to the same peak as 2010, as illustrated in figure 7, where it declined from 14 million in 2010, with a total expenditure of $13.6 billion and barely went back to 13 million in 2019 with a total expenditure of $14.3 billion (WDI, 2020).

Not only did the number of tourists not reach the past peak, but also the increase in the expenditures is masked by the inflation of prices as it is calculated based on nominal prices. This implies that the tourism sector has not fully recovered over the past years to retain its 2010 position, where it can be on the path of realizing its untapped potential.

1.4.1 The Impact of COVID-19 on the Tourism Sector

The outbreak of the Covid-19 pandemic in China since December 31, 2019 has led to tremendous negative repercussions on the tourism industry all over the world in general and Egypt in particular. International travel restrictions in response to the spread of Covid-19 pandemic have led to a sharp decline in international tourist arrivals. International tourist arrivals all over the world declined sharply by 70% during the period (January 2020 - August 2020) compared to the same period of the preceding year (UNWTO, 2020c).

As part of the global economy, the Egyptian tourism sector has been hit sharply by Covid-19 crisis. Egypt announced the first case of Covid-19 on February 14th, and the impact of the crisis started to reflect on the tourism sector starting from March 2020 (Medhat & El Kassas, 2020).

Figure 7: Tourists Arrivals in Millions and Tourists’ Expenditures in Billions USD 2019-2010. Source: Constructed by Author using World Atlas Data
As reported by the UNWTO Global Tourism Dashboard, the total number of international arrivals declined by 64% in March compared to the same month of the previous year. This decline jumped to 100% from April to June due to the suspension of air flights to Egypt, starting from March 19th till June 31st. After resuming flights on July 1st, the decline rate showed a slight recovery and reached 93% in July and 82% in August, respectively. Consequently, international tourism receipts showed a decline by 11% and 90% during the first and the second quarters of year 2020, respectively, compared to the same quarters of the previous year (UNWTO, 2020b). Figures 9 and 10 show the total number of tourists’ arrivals and nights spent over the period (Aug 2019-Aug 2020).

The Covid-19 crisis differs from the other crises in two ways:

- The crisis has a global impact that does not differentiate between developed and developing countries, and its impact is not expected to be short-term.

- The crisis had hit both international and domestic tourism, eliminating the haven for Egyptian tourism sector during times of instability.

Both the Pre- and Post- COVID-19 challenges facing the tourism sector call for innovative approaches to address the challenges surrounding the sector. Although innovation has been part of the MoTA approach since 2018, a need for re-focus and prioritization is inevitable. This is particularly needed to account for the new normal situation and to consider the complex nature of the sector.
2. Problem Statement

Even though Egypt’s tourism product portfolio is diversified and comprises a wide range of tourism products, Egypt relies heavily on both segments of mass tourism: recreational and cultural. Given the increasing competition that characterizes the marketplace of the world mass tourism sector, in addition to the new normal dictated by COVID-19, there is a need to identify unique niche tourism segments and products by focusing on the needs and preferences that have not been addressed yet and introduce them to the sector, thereby increasing its competitiveness and sustaining its revenues.

The identified niche segments and products must be promoted and developed while addressing the structural challenges in the sector, mainly the lack of sufficient tourism services infrastructure in non-touristic cities such as accommodation and transportation. Moreover, a need for reorientation of marketing campaigns towards niche segments and niche tourists’ profiles is inevitable.

In this policy paper, religious tourism is selected as a niche tourism segment with particular focus on the HFT. The selection followed a funnel approach moving from the tourism sector to niche tourism, the religious one, till one product is selected: HFT. The rationale for the selection of each layer under tourism sector is illustrated in the below sections.

2.1 Rationale for Niche Tourism

According to the Tourism Area Life Cycle Model (TALCM), the tourism products of the destinations that are at their latter stages of development should be repositioned and rejuvenated with alternative niche products to expand their life cycle. The establishment of such niches will empower small tourism operators, enable them to compete and maintain their market share in a highly competitive marketplace, and motivate entrepreneurship at the destinations (Knight, 2011).

Niche tourism has also become appealing to policy makers because it is less damaging, more sustainable, and able to generate higher revenues to policy makers compared to mass tourism. Many have referred to the environmental, social, and economic threats associated with the dependency on mass tourism. Mass tourism brings many environmental problems to the hosting destinations, such as littering, damage, depletion of resources, displacement of animals, pollution, etc. Also, the persistent gathering of tourists in large numbers in a given destination could cause major social and cultural problems to both the tourists and locals (Marson, 2011).
2. Problem Statement

In addition, mass tourism is usually associated with a very high cost of sustainability. The continuous flow of tourists in large numbers to a specific destination drains its capacities and decreases its attractiveness to future tourists.

Even though many policies could be implemented to increase the sustainability of mass tourism (e.g., controlling the flow of tourists, regular maintenance of touristic sites, etc.), these policies come with very high financial and administrative costs (Stainton, 2020, October 10).

Niche tourism on the other hand is driven by a special sense of care about the environment, community-driven responses towards cultural heritages, and even a desire for self-improvement. Moreover, niche tourists often spend more in comparison to traditional tourists and thereby guaranteeing more revenues to the places they are visiting. This can be attributed to the fact that niche tourists often have a lust to engage and invest in new and non-traditional activities (Knight, 2011).

Text Box 2: Tourism Area Life Cycle Model (TALC)

Butler (1980) introduced the concept of the Tourism Area Life Cycle Model (TALC Model) which is adapted from the concept of the Product Life-cycle Model in marketing studies. According to this model, any tourism area passes through six main stages in its development, from the exploration stage to post-stagnation stage, as shown in the below figure. These stages are determined based on the evolution of the number of tourists visiting this area. He argues that a tourism area continues to develop until the number of tourists reaches the highest level. After this level, the tourism area will start to experience the negative consequences associated with over tourism (Hazmi, Omar, Mohamed, & Mohammed, 2012).

2.2 Overview of Religious Tourism in Egypt and the HFT

The UNWTO distributed religious tourists according to their purpose of travel into two groups. The first type is aiming to visit the sacred sites of holiness and veneration to complete their pilgrimage. The second type is targeting the traditional and archaeologically sightseeing of sacred edifices for cultural or educational purposes (Abu El Enain & Yahia, 2015).
2. Problem Statement

Egypt's plethora of historical religious sites throughout its monuments and sanctuaries has attracted followers of the world's three monotheistic faiths for millennia (Gaál, 2005). Egypt has many significant and historical mosques, where each one of these mosques refers to a different era of the Islamic era in Egypt such as Al-Azhar Mosque, Hussein Mosque, Ibn Tulun Mosque, etc. Moreover, there is a wide range of Jewish temples, such as the Synagogue of Ben Ezra and the Shaare Shamayim synagogue in Cairo (El-Beltagui, 2011).

Egypt also has many monuments marking the Holy Family's thirty-month journey into Egyptian territory to escape from the oppression of the Romans. These monuments constitute the 25 stops along the 3500 KM HFT from Northern Sinai to Assuit, a unique tourism product to Egypt that targets both pilgrims and standard tourists. The HFT map is provided in the figure below, illustrating the path and stops of the Holy Family.

Figure 11: HFT Map Description. Source (SIS, July 2018).

2.3 Rationale for the HFT

The scope of this policy paper is confined to religious tourism in general and the HFT project in particular. The reason behind the selection of religious tourism is the fact that it has an additional advantage of being resilient to political instability, which makes it a more secure and stable source of tourism than the leisure one. In addition, over the past 5 years, the Egyptian government has exerted unremitting efforts to position Egypt as a religious tourism hub. By adopting Robinson and Novelli's (2005) selection criteria to prioritize niche tourism sectors, the HFT meets the 3 criteria: geographical and demographic criterion, product-related criterion, and customer-related criterion.
2. Problem Statement

Geographical and Demographic Criterion

This criterion depends on the relevance of the niche to the geographical and demographical characteristics of the location. The Holy Family started their journey in Egypt from Northern Sinai and passed through many sites in the Delta, Wadi El Natrun, Greater Cairo and Upper Egypt (EG-GATE, n.a.b). This makes the locations of the HFT fit, by nature, the idea of making this trail a unique destination for religious tourism in Egypt.

Product-related Criterion

This criterion depends on the presence of activities, attractions, settlements, food and other amenities that meet the tourists’ needs. The journey of the Holy Family left behind many churches, monasteries and tombs of great historical importance that coexist along with Egyptian arts in Pharaonic times and Greco-Roman times on the one hand and the Islamic times on the other (El-Beltagui, 2011). However, the trail of the Holy Family incorporates many areas that are remote, less developed and less invested in local economic development. These areas, particularly in the middle of UE, have suffered for many years from marginalization and insufficient lodging supply despite the precious heritage and monuments they possess (MoLD, 2020). Hence, the continuous development of this unique niche will open a great room for the local development of these marginalized areas, especially with the fact that the development of these areas as tourism destinations is currently on the top priority of policy makers. Also, the development of the trail can contribute to the development of other micro niches that could contribute further to their development.

Customer-related Criterion

This criterion places a large weight on tourists’ preferences and expectations from a particular niche in order to make it appealing to them. The development of the HFT is directed to target preliminary 2.4 billion Christian pilgrims globally as well as other traditional tourists. Although the expected market for such emerging niche is large, many efforts still need to be done for marketing it as a niche tourism destination.

Figure 12: Rationale for the HFT Selection as a Priority Niche Tourism Product. Source: Adopted from Robinson and Novelli (2005)
### 3. Assessment of the HFT

#### 3.1 Stakeholders Analysis

<table>
<thead>
<tr>
<th>1. Policy Makers</th>
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</thead>
<tbody>
<tr>
<td><strong>Ministry of Tourism and Antiquities:</strong> The ministry is responsible for: (1) all tangible heritage related to this trail, (2) the selection of the areas and sites to start with, (3) the renovation of archaeological sites and buildings, (4) the promotion of the trail as an emerging niche product that targets mainly Christian pilgrims, and (5) convening the area along the trail with accommodations, attractions, restaurants and other related services.</td>
</tr>
<tr>
<td><strong>Ministry of Culture:</strong> The ministry is responsible for all intangible heritage related to the trail.</td>
</tr>
<tr>
<td><strong>Ministry of Local Development:</strong> The ministry is responsible for the coordination between the governorates where the areas and sites of the Holy Family Trail exist.</td>
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<table>
<thead>
<tr>
<th>2. Private Sector</th>
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<tbody>
<tr>
<td>The private sector can play an important role in the development of the trail through its investment. Given the fact that the Holy Family Trail covers significant areas in Egypt and that most of the areas are remote and underdeveloped, there is a strong need for its participation. The private sector needs to be engaged during different implementation stages of the project and investment facilities and incentives are needed to be introduced from the side of the government.</td>
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<th>3. Local and International Religious Leaders</th>
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<tbody>
<tr>
<td>Domestic and international local religious leaderships are expected to play an important role in consulting with policy makers concerning: (1) the organization of related events and activities that attract tourists, and (2) the content to emphasize on in the marketing of the Holy Family Trail and its timing. They also could be engaged in providing the necessary training for the personnel staff who are going to work in such project (e.g. tour guides, services providers in the sites, etc.).</td>
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<tr>
<th>4. Tourists</th>
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<tbody>
<tr>
<td><strong>Main Audience:</strong> Domestic and international Christian pilgrims whose main purpose is worship and pilgrimage. These tourists are expected to target the place per se and are not expected to come for any other reasons.</td>
</tr>
<tr>
<td><strong>Secondary Audience:</strong> Domestic and international tourists from other religions who believe in Jesus Christ and Virgin Mary. These tourists are less likely to solely target the place and usually come for religious purposes along with other purposes (e.g. exploring history and culture, leisure, etc.).</td>
</tr>
<tr>
<td><strong>Others:</strong> Domestic and international tourists interested mainly in other places but might come to the place to explore different cultures and religions and spend part of their leisure time.</td>
</tr>
</tbody>
</table>
3.2 International Practices

3.2.1 Palestine

One of the best practices in promoting religious tourism in Palestine and in implementing an eco-tourism component was the Abraham’s Path “Masar Ibrahim Al Khalil”. Its implementation approach succeeded in grabbing international tourism. This path has an attractive website that describes itself as “a trail of community-based tourism that follows the footsteps of prophet Ibrahim through the Middle East (Isaac, 2016)." 

According to the official website of the trail, it is a long-distance walking trail following prophet Ibrahim’s path across the Middle East from his birthplace in Urfa, Turkey, south through Syria and Palestine to Beer-sheba. “It is a journey which celebrates not only the countryside through which it passes but also the cultures, antiquities and hospitality along the way”.

The project has been implemented and funded by the World Bank for three years to make substantial improvements to a segment of the trail, from Jenin south through Sebastia to Nablus. The project is a joint effort by an initiative called Abraham Path and the Masar Ibrahim Al Khalil organization. Experts claimed that the key success factors to the project are:

1. Competent and experienced local guides must be selected, trained (including GIS training) and then tested on weekly walks with locals.
2. Existence and development of hospitality services along the trail.

3.2.2 Jordan

Religious tourism constitutes an important segment of tourism for Jordan. In 2005, almost 1/6 of tourists visited holy places. Madaba city is a religious tourism hub in Jordan, where the total number of visitors reached 220,976 in 2017 (MoTA, 2017). To capitalize on the existing demand, the Jordanian Ministry of Tourism has identified the Christian Pilgrimage route that passes through the city of Madaba by listing the religious tourist sites in the city within the tourist route aiming to extend the duration of the tourists’ stay, increase profits, attracting more investment and creating job opportunities for the people of the governorate (Alrawadieh, 2010).

Jordan designed and implemented a religious tourism strategy focusing on promotion, advertisement, sales stimulating, and personal selling to activate Christian religious tourism in Madaba and to have an impact on the local community, national economy and consequently boost the prospects of sustainable development (Al-makhadmah, 2019).

Moreover, Jordan has been in collaboration with many entities to launch a new route which is the Abraham Path in Jordan, following the footsteps of prophet Abraham through the Middle East and capitalizing on the established path and efforts in Palestine. The main aim of this project is “to reinforce the dialogue between the three monotheistic religions and to promote the cultural heritage in the region” (Badr and Hopfinger, 2012).

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8 http://masaribrahim.ps/en/
9 The Christian Pilgrimage route: one of the longest routes in Madaba Governorate, which is 70 km length, starts from Makawar through Jebel Nebo to Al-Maghtas, to be one of the most important historical religious pathways in Jordan (Alrawadieh, 2010). The route is a path for religious, cultural and heritage tourism and meditation (Al-makhadmah, 2019).
3.3 Current Policies on Religious tourism and the HFT

The Egyptian government has been promoting religious sites and attractions over the past 20 years. Nevertheless, these efforts were under the umbrella of cultural tourism promotion and development rather than a standalone focus on positioning religious tourism as a separate segment offered by Egypt. It is also worth noting that these efforts were more themed as initiatives rather than structured policies, programs, and projects.

Over the past 5 years, however, there have been consistent efforts and political will to position Egypt as a religious tourism hub. In 2014, the MoTA announced its willingness to develop and promote the HFT with attractions, services, and amenities along the way. The main objective of this development is to achieve a full urban development with focus on poor areas in Delta and UE. In addition, it will create new paths and areas that will be added to the different archeological sites in Egypt. An additional objective entails encouraging new products of tourism that will result in an increase in the number of nights spent and consequently increase in the total expenditures per night.

3.3.1 Main Activities

Aiming to target the 2.4 billion Christians globally, the MoTA has allocated EGP 60 million through the Tourism and Antiques fund for a project/program to revive this trail, where key activities were carried out by the relevant stakeholders. The key activities can be classified into 3 categories: planning, renovation and development, promotion, and marketing.

3.3.1.1 Planning

1. In 2017, a joint ministerial committee was established to supervise the development of the HFT in Egypt and to select the sites and areas on the trail to be developed and then offered as a new tourism experience especially for Christian pilgrims.

2. The Tourism Development Authority has put down the plan for the development provisions and rehabilitation of the areas and sites of the HFT in cooperation with the Ministry of Local Development (MoLD) and the Civilization Coordination Agency. The plan includes:
   • The development of services surrounding the sites including the improvement of the roads leading to the Holy sites, creation of infrastructure, new roads to pave the entry of tourist cars and buses and guiding signposts.
   • An investment scheme for projects that need to be developed to serve the trail including ecolodge accommodation, bazars, cafes, and restaurants. In addition, the plan included the training of local communities of the different sites.

3.3.1.2 Renovation and Development

1. The Supreme Council of Antiques started the renovation of different religious archeological sites along the Holy Trail. “The Hanging Church” in Old Cairo, followed by the “Church of The Blessed Virgin Mary” and the “Martyr Saint Abanoub” in Samnoud in Gharbiya had their renovation completed and they are now reopened. This is in addition to completing the renovation of different parts of the 4 monasteries in Wadi El Natrun in Beheira.

2. In March 2020, 41 million EGP were redirected to the MoLD to complete the development of the different sites of the Sacred Family Trail.
3.3.1.3 Marketing and Promotion

1. Marking the 1st of June as the beginning of the sacred family trail, in coordination with the orthodox church in Egypt.

2. Establishing a ministerial national committee of experts to document the HFT to have it enlisted by UNESCO as an intangible heritage in addition to the four monasteries as tangible heritage sites. In March 2020, the file was handed to the national committee in Paris.

3. In 2017, a protocol between Egypt and the Vatican City was signed to declare and enlist the Holy Trail in Egypt in the Vatican Pilgrimage Catalogue. In May 2018, the Holy Trail in Egypt became officially enlisted.

4. In 2020, on the Sacred Family Trail anniversary, the MoTA released a digital tour of “St Sergius and St Bacchus Church” in Old Cairo.

5. The MoTA printed a brochure on the Holy Trail in 9 languages. The ministry has also organized different introductory trips for different international delegations from religious institutes such as the National Organization for Christian Pilgrimage in France.

3.3.2 Policy Assessment

To position itself globally on the religious tourism map, Egypt has prioritized the focus on the Holy Trail, which is a politically and economically strategic move. Politically, it sends a global message on Egypt's religious tolerance and openness. Economically, it capitalizes on Egypt's competitive advantage due to the uniqueness of this trail.

It is too early to assess the effectiveness of these policies as the project is in its early stage and any potential tourism activities are hindered by the travel restrictions due to the COVID19 pandemic. However, the “Reviving of the Holy Trail” project has gained international recognition as a best practice by the international organization United Cities and Local Governments (UCLG) in Mexico City Conference.

Nevertheless, the marketing and promotion activities were made on a macro-level with countries and religious representatives rather than focusing on individuals through direct marketing campaigns as “This is Egypt” and “People to People”. Particularly, these two campaigns did not address the Holy Trail or position Egypt as Religious Tourism. Moreover, the current promotional activities have focused on organizations in Western Europe: France and the Vatican, and none of these activities addressed the Americas, where almost %25 of the world Christian population are clustered in 3 countries in them: United States, Mexico, and Brazil.
Lichrou, M., Malley, L., and Patterson, M. (2008) differentiated between three main potential alternative approaches for introducing a new tourism destination. According to their analysis, the selected approach should be identified before designating policies for destinations’ development. These approaches are as follows:

- **The “places as products”** approach. This approach treats a destination as a product per se, that comprises a set of sub-products and services available for tourists' consumption (e.g., services, attractions, infrastructures, activities, environmental resources, and other amenities). Here, the main focus is paid to the tangible heritage; whereas the intangible one (e.g., cultural, historical, intellectual, social, etc.) is considered as merely the destination’s resources that could be employed to create an appealing atmosphere for tourism consumption of the physical/tangible product itself.

- **The “places as culturally meaningful entities”** approach. This approach places importance not only on the destination as a physical place, but also on the social context behind its existence. It treats a destination as a result of an integrated set of meanings that have been developed in a dynamic process throughout the destination's history that led to its existence in reality. Here, the focus is not only on the tangible heritage of the destination, but, more importantly, on the intangible one behind it.

- **The “places as narratives”** approach. This approach could be considered as a more developed form of the second one in the sense that it utilizes the power of narratives in highlighting the importance of the intangible aspect of the destination. These places' narratives could be created through appropriate marketing policies.

In the following lines, we provide a conceptualization of how the HFT could be addressed according to the above alternative approaches. In addition, under each approach we propose relevant policies that could be designated in a way that handles the three main dimensions that require further efforts for the development of the Holy Family Trail in Egypt: **accommodation, transportation, and marketing.**
This is mainly due to the fact that most areas along the trail, especially in UE, are remote and underdeveloped in addition to the lack of necessary amenities for attracting tourists, mainly accommodation and transportation. There is a need for increasing lodging supply coverage along the HFT and maintaining the quality of their services. Also, transportation quality is crucial to the success of the full experience offered to religious tourists visiting the HFT. Even though some elements already exist, such as an airport in Assiut and existing railway infrastructure to the main cities in UE, further enhancement and development of specific routes are needed.

In addition, the current marketing initiatives for tourism focus mainly on branding Egypt as a mass tourism destination, and no specific campaigns have been directed so far towards branding religious tourism and the HFT as a unique tourism destination.

<table>
<thead>
<tr>
<th>Policy Alternative (1): Introducing the Holy Family Trail as a ‘Product Destination’</th>
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<tbody>
<tr>
<td><strong>Brief Description</strong></td>
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</table>
| **Advantages** | A. It is a traditional approach and does not require out-of-the-box solutions to be implemented.  
B. It tries to make the product appealing to a large base of tourists and this could be associated with low risk, high revenues, and low cost of providing tourist services due to economies of scale associated with mass production. |
| **Disadvantages** | A. It treats the cultural, historical, and religious background of the HFT as resources that make the trail appealing without focusing on how the society values and experiences them or how they have contributed to the existence of the place throughout time.  
B. It focuses only on using communities’ resources to maximize tourists’ satisfaction and increase revenues without focusing on the needs of the local communities along the trail. This could lead to an overconsumption of existing resources and a reduction in the destination’s sustainability and attractiveness.  
C. It makes the place subject to intensive competition, given the wide variety of other Christian sites and monuments all over the world.  
D. It attracts consumers who are not too loyal to the place they visit, which makes revenues prone to economic ups and downs. |
4. Policy Alternatives and Recommendations

**For marketing:**
Given that this approach treats the intangible heritage of the place as a means for maximizing tourists’ satisfaction rather than an end in itself, this approach could be seen as based on the idea that religious tourism, including the HFT, is not confined to visitors who seek pilgrimage and worship but also includes visitors who come for cultural exploration or even for leisure. Continuing with mass marketing policies is relevant here as they aim mainly to make a specific product satisfactory to many people, even if not all of them are strongly and emotionally connected to it (Sert, 2017). However, there is a need to make them more consistent and focused on branding the HFT as a religious tourism destination.

**For accommodation:**
Expanding the coverage and improving services quality of traditional hotels along the HFT, especially in the middle of UE (Minya and Asuit), to cater for the HFT tourists’ needs and support the resilience of the tourism sector. Such policies are crucial as the number of hotels in these areas is minimal, and most of them have a low quality of services (local and still under evaluation or lower than 5 stars) (MoLD, 2020). Traditional hotels are relevant to this approach as they act as a means of amenities rather than a way to simulate specific culture and tradition or to expose certain environments, which are not the main objectives in this approach. The GoE can also identify models for development (lighthouses) where successful service quality is implemented and offer them incentives to oversee the implementation/enhancement of new/existing hotels (e.g. Steigenberger hotels as leading in exquisite service and green quality.)

**For transportation:**
Transportation policies also need to fit the objective of reaching the destination in a comfortable way. This could be done by raising the quality of existing roads leading to the HFT’s areas and investing in new roads to reduce congestion. In addition to that, high quality transportation modes (e.g., premium train lines, busses, and Nile cruises) with high quality services during the journey, need to be introduced to promote the positive experience that tourists would gain from their visit. These policies are very crucial especially in less advantaged areas like UE, where the current local transportation is not so reliable, and some tourists may be reluctant to risk experiencing it. They also need collaborative initiatives between the Ministries of Tourism, Local Development, and Transportation.

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**For marketing:**
A. Given the very competitive marketplace, there is a need for consistent promotional campaigns to attract consumers and this would depend on the availability of funds.
B. The attractiveness of the place would not last for too long, as indicated in the TALCM discussed earlier.

**For accommodation and transportation:**
A. Businessmen can be reluctant to risk investing in areas in UE other than Luxor and Aswan unless propitious incentives are provided.
B. Security arrangements for foreigners visiting local areas in UE can jeopardize the process, thus, due coordination for simpler procedures with the Ministry of Interior needs to be attained.
C. Investments and partnerships with relevant stakeholders can reach a deadlock if no win-win situations were guaranteed.
D. The proximity from the locations of accommodation and transportation services to the HFT locations is not guaranteed.
4. Policy Alternatives and Recommendations

**Political Feasibility**
It has high feasibility given the current focus on infrastructure investment in Egypt, the focus on mass marketing in promotion strategies, and the primary intentions of continuing the development of the HFT project. However, this would depend on the availability of necessary funds and the success of collaborative initiatives, especially with the private sector.

**Policy Alternative (2): Introducing the Holy Family Trail as a ‘Culturally Meaningful Destination’**

**Brief Description**
This alternative could be considered as a fully integrated framework for branding the HFT as a niche tourist destination, incorporating both material practices and symbolic meaning. This approach places more weight on the intangible heritage behind the existence of the HFT, along with the tangible one, and considers it as an end in itself available for consumption, rather than just an input for increasing its appeal to tourists.

**Advantages**
A. It places a large weight on the cultural, historical, and religious backgrounds of the HFT that are the main factors behind its existence and could be consumed by tourists on their own. Emphasizing this intangible heritage acts as an instrument for setting up the place in tourists’ mind.
B. It is driven with a special sense of care about the environment, community-driven responses towards cultural heritages, and even a desire for self-improvement.
C. It increases the awareness of local communities about their history and heritage, enables them to see themselves in a more potent way, and enhances their involvement in tourism policies.
D. Relying on the fact that the intangible heritage is more likely to be more unique than the tangible one, this approach exposes the tourism sector to less competition, as it is based on the idea that the place is unique and distinct by nature. Hence, less resources need to be devoted to consistent marketing.
E. It attracts consumers who are too loyal and emotionally connected to the place they visit, which makes tourism to this place resilient to economic ups and downs and enables policy makers to serve their needs better.

**Disadvantages**
A. It usually targets only a small market segment, which is more likely to be connected to the place. This makes it relatively risky, especially at the early stages of its implementation.
B. It misses the economies of scale due to its limited focus.
4. Policy Alternatives and Recommendations

**For marketing:**
Given that this approach places a large weight on the intangible heritage and targets tourists who are strongly connected to the place, it could be seen as based on the idea that the visitors of the HFT come mainly for pilgrimage and worship purposes. In this case, marketing policies need to be designed in a way that increases the international awareness of the spiritual and historical value of the place. Here, the adoption of niche marketing policies tailored to brand the HFT as a unique niche destination, mainly for Christian pilgrims is relevant. This is because niche marketing policies aim at creating a base of loyal customers by making a niche product highly appealing to a specific group of people whose needs have not yet been met (Sert, 2017).

**For accommodation**
Ecolodges' supply could be introduced along the HFT. Such policy is considered as a tool for implementing a comprehensive niche tourism model where different and relevant types can coexist along the trail, especially in culturally rich areas in UE that lack the necessary accommodation. This idea could be sponsored by interested businessmen or individual entrepreneurs, and with the technical support of the World Bank. Such policy is also relevant here as ecolodges are sustainable and responsible to local communities' culture and resources. An example of this is the New Hermopolis in Tunah Al Jabal in Minya, founded and owned by Dr. Mervat Nasser. Her New Hermopolis incorporates pesticide-free farming, ecological architecture and hospitality, tangible and intangible heritage, cultural activities and festivals, handicrafts and personnel staff totally employed from Tuna Al Jabal. Moreover, the establishment of ecolodges in UE areas across the HFT can incorporate the agriculture and featuring of local food. More than 400 products of 8 different categories were identified as Egyptian Terroir food products. Almost 3/1 of these food products are in UE governorates, where almost %75 of them are distributed in governorates other than Luxor and Aswan (UNIDO, 2020).

**For transportation**
Same transportation policies as the first approach are applicable here. However, the way they are implemented should ensure that they enable tourists to expose unique transport experiences, added-value experience, or intrinsic attraction of transport itself (Haaal, 2005). This highly depends on the proximity of transportation to the locations of the HFT areas, the suitability of the environment in which the transportation lines would pass through, and to what extent services provided during the journey support the spiritual nature of the place (e.g., types of food provided, music played, etc.).

**For marketing:**
Niche marketing requires the destination to be fully developed in terms of accommodation, infrastructure, transportation, etc. Government policies need to be designated to stimulate private investments along the HFT, particularly in UE. It requires great investment in know-how for securing the destination's brand and its uniqueness and requires also a highly trained personnel staff.

**For accommodation and transportation:**
Same constraints as the first approach are applicable.

It depends on the availability of funds needed for investing in the development of the areas along the HFT, especially with the current situation of the COVID19- pandemic and its repercussions. It also depends on the willingness and incentives provided to the private sector and individual entrepreneurs in investing in such ecolodges and the relevant transportation modes. However, if these funds were available, this investment would come with great benefits in the long run, after the branding of the HFT is accomplished.
## 4. Policy Alternatives and Recommendations

### Policy Alternative (3): Introducing the Holy Family Trail as a ‘Place’s Narratives’

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<tr>
<th>Brief Description</th>
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<tbody>
<tr>
<td>Same description as the second approach is applicable. However, the link between the tangible and intangible heritage of the HFT would be developed mainly through the power of narratives of place, people, and culture, created and circulated through proper marketing tools.</td>
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<table>
<thead>
<tr>
<th>Advantages</th>
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</table>
| In addition to the advantages of the second approach, this approach  
A. Appreciates the dynamic nature of the intangible heritage that is constructed over time by means of the shared language and symbolic meaning.  
B. Helps understand the cultural background of the place and enhances the local heritage starting from the lived space shared by the dwellers.  
C. Has a great power in forming the meaning and value of the place in the mind of both the local communities and tourists and turning the place into a unique tourism destination.  
D. Relates the marketing of a place to the consumption experience (e.g., narratives generated from tourists who experienced the place could encourage more tourists to visit it). | |

<table>
<thead>
<tr>
<th>Disadvantages</th>
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<tbody>
<tr>
<td>Disadvantages of the second approach are applicable here as well.</td>
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<table>
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<tr>
<th>Related Policies</th>
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| **For marketing:**  
Same policies as the second approach are relevant. However, the focus should be on spoken and visual media (e.g., TV advertisements with relevant pictures, online guided tours, highly trained tourist guides on place telling, adoption of place telling tools like PlacetellingR in Cape Verde, and indirect marketing through stories shared by former tourists), along with the written ones (e.g., documents, brochures etc.). These tools could be employed to provide tourists with narratives on different aspects of the Holy Family journey, emphasizing the meanings and values relevant to branding the place as a unique religious destination. |  |

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<thead>
<tr>
<th>Constraints</th>
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</thead>
</table>
| A. Considerable investments in human capital are needed in order to qualify tourists and other relevant workers to act as narrators of places and culture in relevant areas along the HFT. This could be done by organizing intensive training courses and workshops and inviting international experts in this field to lecture in them.  
B. Considerable investment is also required in the fields of know-how and communication and information technology. | |

<table>
<thead>
<tr>
<th>Political Feasibility</th>
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</thead>
<tbody>
<tr>
<td>Feasible as long as such funds are available.</td>
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</table>
4. Policy Alternatives and Recommendations

4.2 Assessment of Policy Alternatives

Below is the scoring of the suggested alternatives based on economic and technical criteria.

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<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Economic Criteria</td>
<td>Costs</td>
<td>Direct and indirect costs expected to be incurred by the government</td>
<td>25%</td>
<td>7</td>
<td>175</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Benefits</td>
<td>Long-term revenues expected on the economy</td>
<td>25%</td>
<td>7</td>
<td>175</td>
<td>8</td>
</tr>
<tr>
<td>Technical Criteria</td>
<td>Effectiveness</td>
<td>Extent to which suggested policy alternatives interventions likely to solve the imbedded challenges hindering tourism sustainability in Egypt</td>
<td>25%</td>
<td>6</td>
<td>150</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Technical Feasibility</td>
<td>Whether resources and technical know-how are required for the implementation of the policy alternative exist</td>
<td>25%</td>
<td>6</td>
<td>175</td>
<td>6</td>
</tr>
<tr>
<td>Total Score</td>
<td></td>
<td></td>
<td>100%</td>
<td>675</td>
<td>700</td>
<td>650</td>
</tr>
</tbody>
</table>

Table 2: Policy Alternatives Scoring. Source: By authors

4.3 Policy Recommendations

Building on the above analysis of policy alternatives, the culturally meaningful destination is the most fitting policy framework given that it would address the particularly unique nature of destinations across selected areas in UE across the HFT appealing to the target audience of spiritual devotees among Christian pilgrims from all over the world. At the same time, many efforts are needed to enhance the development of such an integrated tourism model, so that narrative-based marketing tools could be implemented. The reason behind the selection of this model is the belief that tourism should be reintroduced as an integrated package that aims at introducing tourists not only to the tangible heritage of the place they visit, but also with the intangible one behind its foundation.

10 On a scale from 10-1, where 10 is the highest.
4. Policy Alternatives and Recommendations

Based on the selected approach, the following policies are recommended in the aspects of marketing, accommodation, and transportation. Particularly, these policies aim to transform the areas along the trail to fully-fledged developed areas that can convene tourists and make them strongly attached to the place:

A. Given the fact that the policies of the development of the Holy Family Trail have started to take place recently, since 2014, this trail could be considered a relatively new niche tourism product in Egypt. In addition, Egypt mainly targets Christian pilgrims all over the world to this trail. Building on these two points, marketing strategies need to be tailored to make Christians introduced to this specific niche product, which makes a niche marketing approach more reasonable. However, intensive efforts are needed to transform the areas along the trail to fully-fledged developed areas that are able to gather tourists and make them strongly attached to the place. In addition, marketing policies need also to target establishing the brand of the HFT in tourists’ mind by the narratives-based marketing tools discussed earlier. Nevertheless, the development of such tools might need some time as it requires large investments in know-how and human capital.

B. Incentives need to be provided to the private sector, local communities, and individual entrepreneurs in order to increase the ecotourism supply coverage along the HFT. In addition, transportation policies need to be implemented in a way that ensures that they enable tourists to expose unique transport experiences, added-value experience, or intrinsic attraction of transport itself.

C. Finally, the focus on Minya to Assiut governorates could potentially take an advantage of the abundant monuments in the region, while also balancing the demand at Aswan and Luxor and other leisure tourism regions spots at Southern Sinai, Cairo, and Alexandria.

It is worth mentioning that such policies will help not only to attract Christian pilgrims but also attract further segments such as the ‘off the path cultural aficionado’ (cultural tourists with special interests in tangible and intangible aspects at tourism destinations), special interest adventurers, who have a passion for discovering unknown cultures, local escapists who often have budget constraints to meet but are open to discovering new areas, and female explorers, who are financially independent but would like to have the experience of a lifetime provided safety aspects are well-met) (MoLD, 2020).

To ensure that these policies are adopted in an effective and innovative approach, it is recommended to:

A. Adopt cooperation rather than traditional service agreements with the private sector, via technically sound distribution of responsibilities between main parties. This approach is cost friendly and allows for a participatory technical consultation where the government can also still steer the process but encourage a higher technical and financial support from the development partners and the private sector.

B. Design tailored programs to address the skills gap in the tourism services sector will remain crucial, with the objective of having tourism education graduates with skills matching the labor market demand in the services sector at UE. This calls in introducing a partnership agreement with institutions/countries in hotel and service management. The model of applied technological schools currently implemented in some firms as in-house learning environments can be of good reference, for the short run. On the long run, collaboration with the Ministry of Education and Technical Education needs to be analyzed to agree on the objectives for tourism schools’ graduates.
4. Policy Alternatives and Recommendations

An implementation plan per recommended policy option is suggested in the below table, where objective indicators, milestones, key activities, suggested timeline, and relevant stakeholders are presented.

### 4.3.1 Implementation Plan

<table>
<thead>
<tr>
<th>Objective Indicator</th>
<th>Milestone</th>
<th>Main Activity Packages</th>
<th>To be completed by</th>
<th>Responsible Stakeholders</th>
<th>Supported by</th>
<th>Available Resources</th>
</tr>
</thead>
<tbody>
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<td></td>
<td>Establish a taskforce of interested international development and national owners on establishing a joint reform strategy and plan (World Bank, MoTA, MoLD &amp; other relevant experts on the topic).</td>
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<td>Identify business associations interested in investing in establishing a chain of ecodges across the Holy Family Trail in UE.</td>
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<td></td>
<td></td>
<td>Identify financial incentives for the attraction of investors.</td>
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<tr>
<td></td>
<td></td>
<td>Design attractive touristic packages that compile aspects of gastro, community, cultural/heritage and agro-based tourism.</td>
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<td></td>
<td>Design a map for the potential spots where introduction of eco-based lodges would be suitable.</td>
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<tr>
<td></td>
<td></td>
<td>Form a taskforce with interested parties including (Ministry of Transportation including, private bus companies such as Go Bus, Blue Bus, SWVL, travel associations offering prime Nile cruise trips, religious tourism experts, marketing personnel,</td>
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<tr>
<td></td>
<td></td>
<td>Formulate a clear mini operational plan, with varying options matching middle- and upper-income citizens, locally and internationally.</td>
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<tr>
<td></td>
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<td>Formulate a clear mini operational plan, with varying options matching middle- and upper-income citizens, locally and internationally.</td>
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</tbody>
</table>

**Milestone**
- To be completed by June 21-Dec 22

**Available Resources**
- Existing model on ecodges in Minya
- Technical staff at MoLD and MoTA
- Potential cooperation funds from development partners

---

Post COVID19- Tourism: Promoting the Holy Family Trail as a Niche Religious Tourism Destination
### 4. Policy Alternatives and Recommendations

<table>
<thead>
<tr>
<th>Tailored Marketing and promotion plan for selected areas across the HFT in UE as a culturally meaningful destination has been identified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formulate a partnership agreement with the selected transportation company, with clear funding and technical responsibilities.</td>
</tr>
<tr>
<td>Forming a specialized taskforce to assess the current situation of the areas and the archeological sites along the Holy Family Trail.</td>
</tr>
<tr>
<td>Prioritizing the areas to start with in UE between Minya and Assiut.</td>
</tr>
<tr>
<td>Ensuring the necessary funds for their development and renovation.</td>
</tr>
<tr>
<td>Selecting a marketing agency for the assignment.</td>
</tr>
<tr>
<td>Identifying the main and the potential targeted tourists (domestically and internationally).</td>
</tr>
<tr>
<td>Conducting an intensive market research to identify their needs and preferences.</td>
</tr>
<tr>
<td>Kicking off the branding of the Holy Family Trail and increasing the awareness of its unique value as a culturally meaningful destination domestically then internationally.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tourism Promotion Authority</th>
<th>MoTA</th>
<th>MoLD</th>
</tr>
</thead>
</table>

Assiut and Minya Governorates and local municipalities
Marketing experts
Religious tourism experts
National and international tourism influencers

Table 3: Proposed Implementation Plan. Source: By authors


Afifi, Y. (2020, June 1). 60 million pounds ... Learn about the latest details of developing the sites of the Holy Family Path in Egypt. Masrawy. Retrieved from: https://www.masrawy.com/news/news_egypt/details/2020/6/1/1799513/-60-%D9%85%D9%84%D9%8A%D9%88%D9%86-%D8%AC%D9%86%D9%8A%D9%87-%D8%AA%D8%B9%D8%B1%D9%81-%D8%B9%D9%84%D9%89-%D8%A3%D8%AD%D8%AF%D8%AB-%D8%AA%D9%81%D8%A7%D8%B5%D9%8A%D9%84-%D8%AA%D8%B7%D9%88%D9%8A


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Contribution-of-travel-and-tourism-to-employment


Direct-contribution-of-travel-and-tourism-to-employment


References


Interviews:
Ragab, A. (2020, December 29). Dr. (P. P. Team, Interviewer)
# Appendix

## Appendix 1: Types of Niche Tourism in Egypt

<table>
<thead>
<tr>
<th>Segment</th>
<th>Description</th>
<th>Current Development Status in Egypt</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ecotourism</strong></td>
<td>Eco-Tourism is one type of tourism that aims to focus on enjoying the natural environment in the sea, mountains, and deserts. Egypt has several rare environmental sites that attract visitors all over the world. Natural reserves or protected areas have been developed in Egypt since the 1980's.</td>
<td>Natural reserves or protected areas have been developed in Egypt since the 1980's, where they are all subject to the supervision of the Ministry of Environment. Among the most famous of these are Ras Muhammad Reserve, Nabq Reserve, St. Catherine Reserve, Tabah Reserve in Sinai, Jabal Elba Reserve in Halayeb, Wadi El Rayan and Lake Qarun in Fayoum, Elba Protected Area in Halayeb, Petrified Forest in Cairo, Alexandria Aquarium, etc. (Elnagar &amp; Derbali, 2020). Recently, the Ministry of Environment in collaboration with the Ministries of Tourism and Antiquities and Mass Media launched the first ecotourism promotion campaign “ECO Egypt” last September from Ras Muhammad Reserve to support ecotourism in Egypt. This campaign aims to promote 13 natural reserves in Egypt for introducing them as eco-friendly tourism destinations and is expected to last for two years, according to Dr. Yasmine Fouad, the Minister of Environment, in her interview with Al-Gomhourya Newspaper in Jan 7th, 2021.</td>
</tr>
<tr>
<td><strong>Health Tourism</strong></td>
<td>It entails both medical tourism, which addresses poor health, and wellness tourism, which addresses extending lifestyle wellness. Egypt has several internationally accredited hospitals and clinics that provide medical treatment at affordable prices compared to other destinations (EG-GATE, n.a.a). Also, Egypt possesses the required ecological environment. The estimated number of springs all over Egypt reached 1356, in addition to deserts and oases areas (SIS, 2017, March 23).</td>
<td>For medical tourism, Egypt has many constituents that enable it to compete as a medical tourism destination; however, it has below 0.7% of the world share (Zaki, 2017). Currently, Egypt hosts around 150,000 tourists seeking medical treatment every year from all over the world, mainly patients from Arab and African countries, European countries, and East Asian countries (SIS, 2017, March 23). On top of possessing the required competencies, the Egyptian governorate has launched different initiatives to promote medical tourism. This includes “Tour n Cure” campaign focusing on Hepatitis C, acknowledged by WHO, where it offered tourists an affordable tourist package that covered their travel costs and a one-week stay, out of the 3 months' worth of treatment, at a five-star hotel, while touring in the country’s landmarks (Bower, July 2017).</td>
</tr>
<tr>
<td><strong>Religious Tourism</strong></td>
<td>Many tourists come to Egypt to enjoy its Jewish, Coptic, and Islamic sites that are spread throughout its monuments and sanctuaries.</td>
<td>The Egyptian government has exerted diverse efforts to promote religious tourism in the past 20 years. Both the ministry of tourism and ministry of culture have begun restoring several historical religious sites since 2000 (Galal, 2005). The government launched a tourism initiative to promote the tourism of the Holy Family in Egypt, carrying out extensive renovations in old Cairo. Moreover, the ministry of tourism initiated a program targeted at Shia pilgrimage, where they have also spent EGP 12 million on a walking tour</td>
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</tbody>
</table>
### Post COVID-19 - Tourism: Promoting the Holy Family Trail as a Niche Religious Tourism Destination

<table>
<thead>
<tr>
<th><strong>Appendix</strong></th>
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<tbody>
<tr>
<td><strong>MICE Tourism</strong></td>
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<tr>
<td><strong>Community Based tourism (CBT)</strong></td>
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</tbody>
</table>
Other initiatives have been introduced either from local communities to promote CBT or entrepreneurs.

- In 2015, the local Bedouin tribes in Sinai launched the Sinai Trail that aimed at attracting tourists to hike in Sinai and changing the common stereotype that Sinai is a danger zone for tourists (Abdulalaal, 2020, July 19).
- In 2007, The New Hermopolis, an entrepreneurial natural lodging founded at Tunah Al Jabal in Minya in 2007. The motivation behind it is to reinforce tourism as a full-fledged package that aims at introducing tourists not only with the tangible heritage of the place they visit, but also with the intangible one behind its foundation (e.g., intellectual, historical, traditional, and social heritage, etc.).

<table>
<thead>
<tr>
<th>Gastro Tourism</th>
<th>It is a form of niche tourism that involves experiencing local food either as the main purpose of the journey or at least among its main components</th>
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<tbody>
<tr>
<td></td>
<td>Egypt has more than typical (Terroir) food products excluding recipes, where almost 1/3 of Egyptian typical food products are found in UE governorates (UNIDO, 2020). This tourism segment is not yet full-fledged. However, some individualistic efforts emerged including “Bellies En-Route” a culinary tourism start-up, “Visit Badrashin” a development program/initiative and “Cairo Bites” which is one of the biggest food festivals (Elmoghazy &amp; Omar, 2016).</td>
</tr>
</tbody>
</table>

Table 4: Details on Niche Tourism Segments in Egypt. Source: By authors
The Public Policy HUB is an initiative that was developed at the School of Global Affairs and Public Policy (GAPP) in October 2017. It was designed to fill in the policy research gap in Egypt. It provides the mechanism by which the good ideas, plausible answers, and meaningful solutions to Egypt’s chronic and acute policy dilemmas that are proposed by the country’s best minds, the experienced and the creative from different age brackets, can be nurtured, discussed, debated, refined, tested and presented to policymakers in a format that is systematic, highly-visible and most likely to have a lasting impact.

It is designed to develop a cadre of well-informed and seasoned policy developers and advocates, while simultaneously fostering and promoting creative solutions to the challenges facing Egypt today. The project provides a processing unit or hub where policy teams are formed on a regular basis, combining experienced policy scholars/mentors with young creative policy analysts, provide them with the needed resources, training, exposure, space, tools, networks, knowledge and contacts to enable them to come up with sound, rigorous and yet creative policy solutions that have a greater potential to be effectively advocated and communicated to the relevant policymakers and to the general public.

Since its establishment, the Public Policy HUB has been supported by Carnegie Corporation of New York, UNICEF Egypt, and Oxfam. The Hub had partnerships with different ministries and governmental institutions like the Ministry of Social Solidarity, Ministry of Planning, Ministry of Health, Ministry of Trade and Industry, Ministry of Local Development, Ministry of Education, Ministry of Environment, National Council for Childhood and Motherhood, National Population Council, and General Authority For Transportation Projects Planning.

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