An Analytical Reading of the Omani Tourism and Hospitality Industry Figures (2019-2022)

By Masooma Al-Balushi[*] & Tamer Atef[±]

Studies on the effect of COVID-19 pandemic worldwide indicate significant decreases in revenues and job losses in the tourism and hospitality industry. To what extent is this the case in the Sultanate of Oman? The current study tries to answer this question and much more; therefore, this study aims to assess the impact of COVID-19 pandemic on the Omani tourism and hospitality industry. The study analyzed and interpreted the Omani Ministry of Heritage and Tourism, the Omani National Center for Statistics and Information (NCSI), and the United Nations World Tourism Organization (UNWTO) reports, statistics, and figures. The acquired secondary data were classified, summarized, tabulated. Frequencies and percentages were used in rankings, evaluations, comparisons, and analysis. This study provides scholars, policy makers, and industry affiliates with a scientific overview of the Omani tourism and hospitality industry performance during the COVID-19 pandemic.

Keywords: *COVID-19 pandemic, employment, hospitality, Oman, tourism, UNWTO*

Introduction

The Sultanate of Oman is located on the south-eastern tip of the Arabian Peninsula. It is bordered by the Gulf of Oman and the Arabian Sea and has borders with the United Arab Emirates, Kingdom of Saudi Arabia and Yemen. It is the third largest country in the peninsula, with an area of 309,500 km², and a population of almost 2.804 million Omanis of which 50.4% are males and 49.6% are females and 1.723 million non-Omanis of which 78.3% are males and 21.7% are females (Al Balushi 2018, National Center for Statistics and Information 2022a, Omanuna 2022).

Oman's economy is highly dependent on oil, which represented 73.6% of the total actual revenues by the end of 2021 (Kutty 2022). Because of economic and demographic factors, the government has adopted a plan that focuses on economic diversification, with the objective of reducing dependence on the oil sector and creating more jobs to employ the increasing numbers of Omanis entering the labour market. Tourism is one of the major pillars upon which the government depends to achieve its developmental strategies (Ali et al. 2017) being a major worldwide employer as one out of every ten jobs is directly related to tourism and hospitality (UNWTO 2020).

[*]Assistant Professor, Tourism Department, College of Arts and Social Sciences, Sultan Qaboos University, Sultanate of Oman.
[±]Associate Professor, Hotel Studies Department, Faculty of Tourism and Hotels, University of Sadat City, Egypt.

Tourism in Oman has a long history, dating back to the ancient trading routes and seafaring activities. However, the modern tourism industry in Oman started in the 1980s when the country opened up to foreign tourists. Since then, Oman has been investing heavily in promoting its tourism industry and developing the necessary infrastructure to attract more tourists (Al Balushi and Atef 2019, Ministry of Heritage and Tourism 2021). Oman has a diverse landscape, which provides tourists with a variety of activities such as hiking, camping, beach sports, and wildlife observation. In addition to plenty of cultural attractions, including historic forts, museums, and traditional markets (Ministry of Heritage and Tourism 2021). Unfortunately, the tourism and hospitality sector contribution to employment is still very low at 6% and with a workforce that is highly dominated by expatriates (Al Nahdi 2016). In 2019, the tourism sector accounted for about 2.5% of the gross domestic product (GDP), the Omani government aspires for a higher contribution, the target is to reach 6% to 10% by 2040 (THR Innovative Tourism Consultants 2016).

The tourism and hospitality industry provides total interactive memorable experiences to its patrons, the COVID-19 pandemic has paralyzed the industry due to the unprecedented restrictions on mobility, and since tourism as an industry is known to be labour intensive, the pandemic has had a negative impact on tourism and hospitality employment (Rastegar et al. 2021, Seyfi et al. 2020, Sobaih et al. 2021), it has affected several employment categories and levels, especially those with low education credentials and skills (UNWTO 2022a). Furthermore, the minute-by-minute media coverage of countries' different responses and countermeasures taken during the pandemic has negatively affected many destinations' image and future travel plans (Gössling et al. 2020, Neuburger and Egger 2020).

The situation was not different in the Sultanate of Oman, the tourism and hospitality sector was shaken, severe economic drawbacks were recorded, for example: significant decreases in tourists arrival figures and in occupancy rates have been registered. There is a need for academics, analysts, and specialists to analyze and interpret the exact ramifications of the COVID-19 pandemic on the Omani tourism and hospitality industry (Al Hasni 2021).
The current study poses some critical questions and tries to answer them:

1. How was the effect of COVID-19 pandemic on the Omani tourism and hospitality industry?
2. What are the statistics on industry related registered activities?
3. What are the industry related registered activities?
4. What is the industry employment structure/figures?

Therefore, the study aims to assess the impact of COVID-19 pandemic on the Omani tourism and hospitality industry through the following study objectives:

1. To analyze the Omani tourism and hospitality industry figures (2019-2022).
2. To analyze the statistics on industry related registered activities (2019-2022).

3. To analyze industry related registered activities nature and types (2019-2022).
4. To analyze industry employment structure/figures (2019-2022).

This study provides scientific knowledge to scholars, policy makers, and industry affiliates of the Omani tourism and hospitality industry and the unprecedented situation it faced as a result of the COVID-19 pandemic.

Literature Review

Labour Market and the Localization Plans in the Gulf Cooperation Council (GCC)

While unemployment of citizens is one of the biggest challenges in the Gulf Cooperation Council (GCC: Kingdom of Bahrain, Kingdom of Saudi Arabia, Kuwait, Qatar, Sultanate of Oman, and United Arab Emirates) region, the Gulf states have the largest share of migrant workers in the world. This is a dilemma, on one hand unemployment between citizens is a pressing issue while on the other hand the workforce is dependent on expats to a large extent (Atef and Al Balushi 2015, Metwally 2003, Zerovec and Bontenbal 2011).

Oman's population is growing, resulting in a society with 60% of its population below the age of twenty-five (Ali et al. 2017). To face the unemployment pressing situation among citizens (See Table 1) and to lessen the dependence on non-Omani workforce, the Omani government is supporting entrepreneurship and putting in action the localization (Omanization) policy/plan (Atef and Al Balushi 2017).

Table 1. *Unemployment Rate in Oman (2017-2021)*

Year	Unemployment Rate	Change (+/-)
2017	2.57%	0.70% decline
2018	1.80%	0.77% decline
2019	1.85%	0.05% increase
2020	2.94%	1.09% increase
2021	3.12%	0.18% increase

Adapted from: The World Bank (2022).

Localizing (Omanizing) the workforce is the process of training and developing Omanis skills and competences, aiming to decrease dependence on non-Omani workforce and eventually replacement with Omani personnel. The Omanization plan has its roots back to 1988. Similar labour nationalization plans are being executed in the Gulf region, including the Emiratization in the United Arab Emirates and the Saudization in Saudi Arabia (Atef and Al Balushi 2017, Law et al. 2004, Wong and Law 1999).

The Economic and Strategic Importance of Tourism

The tourism industry can accommodate different categories of job seeker with varying skills and educational levels, it can even employ persons with no previous work experiences (Liu and Wall 2006, Pan 2015). Taking the hospitality industry as an example, for every created hotel room one job opportunity becomes available, another three indirectly related job opportunities are created in activities pertaining to travel agencies, transportation, retail stores, and activities and entertainment (MacFeely and O'Brien 2009).

The Omani government has taken remarkable steps to develop and promote tourism to help achieve economic diversification and accomplish the aspired Omanization plans (Pujol and Forster 2007). The total number of classified hotels reached 630 in 2022 (Ministry of Heritage and Tourism 2022a). A total of seventy-four registered tourism activities were recorded by the Omani Ministry of Heritage and Tourism during the period from 2019 till end of March 2022. Tourism registered activities are the operations/businesses registered at the Omani Ministry of Labour and fall under the umbrella of tourism and hospitality (Ministry of Heritage and Tourism 2022b). The more the tourism products/ activities offered by destinations/countries the more the ability of the industry to supply the labour market with various job categories and levels (Dorta-González and González-Betancor 2021).

The Omani Tourism Strategy 2040, developed by THR Innovative Tourism Consultants together with the Omani Ministry of Heritage and Tourism focuses on fourteen areas as potential tourism complexes. The Strategy Implementation Plan is divided into three phases: The first phase (2016-2020) includes developing more than 5,620 new hotel rooms and creating more than 76,384 new direct jobs. The second phase (till 2030) includes adding more than 15,419 new hotel rooms and creating more than 126,900 direct jobs. The third phase (2031-2040) includes adding more than 29,596 new hotel rooms and creating more than 242,990 new direct jobs. The Omani Tourism Strategy 2040 aims to achieve several benefits by the end of 2040 (THR Innovative Tourism Consultants 2016):

- Providing more than 500,000 jobs.
- Increase hotel rooms, as well as tourism units with hospitality services, camping sites and villas, to a total number of 80,000 tourism units.
- In 2019, the tourism sector accounted for about 2.5% of the gross domestic product (GDP) in the Sultanate of Oman, and the target is to reach 6% to 10% by 2040.
- The number of Small and Medium Enterprises (SMEs) is planned to be 1200.

Tourism was the third largest major export category in the world after fuels and chemicals before the COVID-19 pandemic. Based on the fact that tourism creates jobs and elevates economies, the sector's recovery is anticipated to drive growth all over the world. After a global setback of 3.4% in 2020 and a recovery of 5.5% in 2021, the world economy is estimated to grow by 4% in 2022 followed by another improvement of 3.5% in 2023 (UNWTO 2022a).

The COVID-19 Pandemic Effect on Tourism and the Recovery Plans

Global tourism suffered significantly in 2020, with international arrivals dropping by 74% according to the data from the United Nations World Tourism Organization (UNWTO). Destinations worldwide suffered a decrease of one billion in international tourists' arrivals in 2020 than in the previous year. The downfall in international travel represents a loss of nearly USD 1.3 trillion in export revenues. The crisis has put at risk between 100 and 120 million direct tourism jobs, many of them in small and medium-sized enterprises (SMEs) (World Travel and Tourism Council (WTTC), 2020; United Nations World Tourism Organization (UNWTO), 2021). Despite the fact that small and medium-sized enterprises (SMEs) have a high degree of resilience and flexibility that could help them survive the COVID-19 pandemic and beyond (Branicki et al. 2018, Eggers 2020, Kuckertz et al. 2020, Pal et al. 2014) the ramifications of the pandemic on social life, mobility, as well as consumption patterns, left no space for maneuverability leading to a radical decrease of business and consequently, loss of revenues (Bae and Chang 2020, Baum and Hai 2020, Clark et al. 2021, Romagosa 2020, Wen et al. 2021).

Oman's tourism sector suffered the COVID-19 pandemic repercussions which included the loss of revenues, the reduction in hotel occupancy rates, and the unfortunate job losses (Al Hasni 2021). Small and Medium Enterprises (SMEs) in the tourism sector had to cut employee pays. High employee turnover resulted due to the inability to secure staff salaries/payments (Al Hanai and Matriano 2021).

The ultimate goal of all tourism dependent governments and destinations is to put the industry back on the right track and achieve the pre-pandemic tourists' figures and revenues. This endeavor requires the collective efforts of governments, international organizations, policy and decision makers, marketeers, and media to mitigate the travel risk perceptions created as a result of the pandemic (Kim et al. 2021, Matiza 2020). Encouraging and motivating tourists and travelers to start planning for tourism and seek hotels and restaurants services is a challenge, an equally important challenge is to help those organizations that suffered financially because of the pandemic to resume their operations and to encourage investors to invest in the sector once more, not only immediate governmental financial remunerations are needed but also the creation of a crisis recovery fund scheme to face any future incidents (Frye et al. 2020, Kumar 2020, Rivera et al. 2021).

The COVID-19 pandemic has made it evident that the role of governments and policy makers is crucial to the survival of tourism and hospitality related businesses (Kuscer et al. 2022). The closures and movements restrictions have severely affected these businesses (Sharma et al. 2022, Sigala 2020), during such periods, many governments offered financial support and assistance but were not enough for the survival nor for the recovery from the pandemic effects (Khalid et al., 2021). More needs to be systematically offered to support tourism and hospitality stakeholders and heal the sector (OECD 2020).

As the tourism and hospitality industry continues to grapple with the effects of the COVID-19 pandemic, it is imperative for all stakeholders to take proactive

measures that will help revive the sector to full recovery (Frye et al. 2020, Jones 2022, Kim et al. 2021, Kuscer et al. 2022, Matiza 2020, OECD 2020, Rivera et al. 2021, Sigala 2020): Firstly, it is essential to create comprehensive health and safety protocols that will ensure the safety of tourists and hospitality workers. This can be achieved through training employees in proper hygiene practices in hotels, restaurants, and tourist attractions. Secondly, it is crucial to encourage domestic tourism by promoting and highlighting local tourist attractions and experiences. This strategy will help businesses to generate revenues while also allowing residents to experience the beauty of their own country. Thirdly, stakeholders in the industry should consider developing creative marketing campaigns that will attract tourists to their destinations. This could include providing discounts, offers, and packages to lure travelers. Finally, it is essential to remain flexible and adaptable. This implies being open to adjusting strategies and protocols to accommodate future incidents.

The government of the Sultanate of Oman approved a recovery plan that included six pillars to help overcome the repercussions of the COVID-19 pandemic for a period of three years. It included (UNWTO CME 2022, p. 11):

1. Maintaining safety and precautionary measures to protect tourists and workers, as well as human capital sustainability.
2. Supporting local communities to control the impact of the COVID-19 pandemic.
3. Developing tourism programs to accommodate the aspirations of tourists and the changes that occurred after the COVID-19 pandemic.
4. Focusing efforts on marketing the Sultanate of Oman as a tourist destination in the target markets.
5. Supporting investment in the tourism sector through approving a set of investment incentives for Omani SMEs, or even foreign investors wishing to invest in the Sultanate of Oman in the tourism sector.
6. Exempting the nationals of 103 countries from visa requirements before visiting the Sultanate of Oman, which is expected to have a positive role in the return of tourism momentum and movement to the country.

Tourism Activities and Statistical Analysis

Data and statistical analysis help to create knowledge, which is fundamental to providing and expanding perceptions. The performance of the tourism industry is measured and monitored through statistical figures such as: tourists' flow and revenues generated. In some cases, tourism statistics suffer fallacies because of ambiguity of the used tourism terminology and/or the use of unverified date collection schemes, among others. Official tourism statistics are the most reliable source upon which economists, officials and many tourism industry affiliates depend in their businesses management and strategic planning (Kotlinski 2003, Perera 2017, Van Truong et al. 2022, Volo and Giambalvo 2008, Wöber 2000).

To standardize economic reporting and statistical analysis of productive activities, the International Standard Industrial Classification of All Economic

Activities (ISIC) was created by the United Nations Economic and Social Council. It is the international reference classification of productive activities. Since the adoption of the original version of ISIC in 1948, the majority of countries around the world have utilized it in developing national activity classifications and has become an important tool for economic statistical data comparisons at the international level (UN 2008). At its twenty-seventh session, in 1993, the Statistical Commission following recommendations in the United Nations World Tourism Organization (UNWTO) report on tourism statistics; adopted the Standard International Classification of Tourism Activities (SICTA) as a referential classification for use by countries (United Nations (UN) & United Nations World Tourism Organization (UNWTO), 1994). SICTA details both the characteristic activities that comprise the tourism industries and other tourism related activities. In addition to providing a framework for tourism services data collection practices (UNWTO 2000). The Tourism Satellite Account (TSA) is the second international standard on tourism statistics aiming to promote the consistency and comparability of national and international tourism statistics and analysis (United Nations (UN), & United Nations World Tourism Organization (UNWTO), 2008). TSA defines tourism industries as all establishments whose principal productive activity is a tourism characteristic activity (TCA). Tourism Characteristic Activities can be identified as those productive activities which principal output is characteristic of tourism, in other words, they are the activities that typically produce tourism characteristic products (TCP) (See Table 2) (UN 2008).

Table 2. *Characteristic Products and Characteristic Activities for the TSA*

Tourism Characteristic Products (TSA/TCP)	Tourism Characteristics Activities (TSA/TCA)
1 Accommodation services *1.1 Hotels and other lodging services* *1.2 Second homes services on own account or for free*	1 Hotels and similar
2 Food and beverage serving services	2 Second home ownership
3 Passenger transport services *3.1 Interurban railway transport services* *3.2 Road transport services* *3.3 Water transport services* *3.4 Air transport services* *3.5 Supporting passengers transport services* *3.6 Passenger transport equipment rental* *3.7 Maintenance and repair services of passenger transport equipment*	3 Restaurants and similar
4 Travel agency, tour operator and tourist guide services *4.1 Travel agency services* *4.2 Tour operator services* *4.3 Tourist information and tourist guide services*	4 Railway passenger transport services
5 Cultural services *5.1 Performing arts* *5.2 Museum and other cultural services*	5 Road passenger transport services
6 Recreation and other entertainment services *6.1 Sports and recreational sport services* *6.2 Other amusement and recreational services*	6 Water passenger transport services

7 Miscellaneous tourism services *7.1 Financial and insurance services* *7.2 Other good rental services* *7.3 Other tourism services*	7 Air passenger transport services
	8 Transport supporting services
	9 Transport equipment rental
	10 Travel agencies and similar
	11 Cultural services
	12 Sporting and other recreational services

Adapted from: UNWTO (2000).

Methodology

In tourism research, the aim of searching for figures and data followed by statistical analysis is to create interpretive information to understand nature, society, relations, inform the decision-making process and generate predictive models for future events (Latham and Edwards 2003, Smith 1988, Volo 2018). Secondary data analysis is the processing of data that were collected to be used for other primary purposes (Johnston 2014). It is the reanalysis of previously collected data, which is widely used in social science research (Punch 2005). How the researcher collects, analyses, and interprets the data constitutes the study research method (Creswell 2009). With regard to the current study, it started in June 2022 to investigate the situation before, during, and after the COVID-19 pandemic (2019 till 2022 available data). This study is based on secondary data analysis which were acquired/collected from the reports, statistics, and figures of the following national and international entities/organizations:

1. **The Omani Ministry of Heritage and Tourism**
    - Number of hotels 2011 - until March 2022 (Ministry of Heritage and Tourism 2022a).
    - Data of the national and expatriate workforce in the tourism sector in various activities and professions under the sector (2019-2022) (Ministry of Heritage and Tourism 2022b).

The Ministry reports, statistics, and figures were used based on the fact that this entity is the main official authority responsible for the sector strategies, plans, and development within the context of the Omani Tourism Law and the country's legislations and Laws. Article 1 of Oman's tourism law, decree No. 33/2002, states: "This law aims to encourage, promote and develop tourism in Oman and develop its resources and investments to increase its contribution to the national economy by regulating the establishment and utilization of the country's tourism resources and creating the administrative regulations and manpower necessary to encourage and promote tourism activity in order to support cultural and intellectual communication between the citizens of Oman and other peoples of other countries" (Royal Decrees 2002).

2. The Omani National Center for Statistics and Information
- Electronic census of population, housing, and establishments (End of December 2021) (NCSI 2022a).
- Monthly tourism index report (March 2022) (NCSI 2022b).
- Monthly tourism index report (April 2022) (NCSI 2022c).
- Monthly tourism index report (May 2022) (NCSI 2022d).
- Monthly tourism index report (June 2022) (NCSI 2022e).

The National Center for Statistics and Information was established by the Royal Decree No. 31/2012, 2012. The center follows the Supreme Council for Planning. The center has a legal personality and financial and administrative independence (Royal Decrees 2012). Its mission is: "To satisfy the government's need of official statistics and reliable information to be used in setting policies and programs on local, regional, and international levels; taking into consideration the accelerating economic and social variables. We also seek to satisfy the needs of all authorities in acquiring data in all areas of development" (NCSI 2019). The National Center for Statistics and Information data were used as it is the authority assigned with the mission of providing official statistics and reliable information to be used by the Omani officials in setting policies and programs on local, regional, and international levels, as indicated in its mission statement and as intended by its establishment decree.

3. The United Nations World Tourism Organization (UNWTO)
- 145 key tourism statistics (Bulk Data) (UNWTO 2022b).

The United Nations World Tourism Organization (UNWTO) is a specialized agency of the United Nations (UN). The UNWTO data were used for their reliability and validity as the organization's published data are directly collected from countries through a series of yearly questionnaires that are in line with the standard led by UNWTO and approved by the UN (UN 2010).

The used reports, statistics, and figures were classified, summarized, tabulated. Frequencies and percentages were used in rankings, evaluations, comparisons, and analysis, all of which were interpreted allowing the current study to offer clear implications and precise courses of actions. These utilized reports, statistics, and figures answered the study questions and achieved its objectives as follows:

- **Question:** How was the effect of COVID-19 pandemic on the Omani tourism and hospitality industry?
- **Objective:** To analyze the Omani tourism and hospitality industry figures (2019-2022)
- **Reports, Statistics, and Figures**
  - Number of hotels 2011 - until March 2022.
  - Electronic census of population, housing, and establishments (End of December 2021).

- Monthly tourism index reports (March 2022 - April 2022 - May 2022 - June 2022).
- 145 key tourism statistics (Bulk Data).

- **Question:** What are the statistics on industry related registered activities?
- **Objective:** To analyze the statistics on industry related registered activities (2019-2022)
- **Reports, Statistics, and Figures**
  - Data of the national and expatriate workforce in the tourism sector in various activities and professions under the sector (2019-2022).

- **Question:** What are the industry related registered activities?
- **Objective:** To analyze industry related registered activities nature and types (2019-2022)
- **Reports, Statistics, and Figures**
  - Data of the national and expatriate workforce in the tourism sector in various activities and professions under the sector (2019-2022).

- **Question:** What is the industry employment structure/figures?
- **Objective:** To analyze industry employment structure/figures (2019-2022)
- **Reports, Statistics, and Figures**
  - Data of the national and expatriate workforce in the tourism sector in various activities and professions under the sector (2019-2022).
  - Electronic census of population, housing, and establishments (End of December 2021).

Additionally, the literature reviewed allowed to check the tourism registered activities against the Standard International Classification of Tourism Activities (SICTA) and the Tourism Satellite Account (TSA) created by the UNWTO to verify the structure of the industry and to validate the related statistics.

Results and Discussion

The Omani Tourism Industry Performance Indicators

By reviewing tourists arrival figures to Oman from 2016 till 2020 (See Table 3) it is clear that the figures (arrivals and revenues) reached a peak in 2019 then drastically decreased in 2020 this is clearly attributed to the precautionary measures taken all over the world due to the COVID-19 pandemic and what followed of borders closing and the emergency halt of all movements between countries which consequently affected all tourism related activities and decreased tourism receipts. The effect of the COVID-19 pandemic on the Omani tourism and hospitality industry revenues and employment was disastrous as suggested by the literature reviewed (Al Hasni 2021).

Table 3. *Total Tourists Arrival Figures to Oman (2016-2020)*

Year	2016	2017	2018	2019	2020
Total arrivals	3.21 m	3.18 m	3.24 m	3.51 m	869,000
Tourism Expenditure in the Country	2.32 bn $	2.63 bn $	2.87 bn $	3.08 bn $	669.00 m $

Adapted from: United Nations World Tourism Organization (UNWTO) (2022b); m=Million, bn=Billion, $=Dollars.

The monthly tourists arrival figures to Oman during 2022 started to gradually increase reaching a total of 1,026,865 by the end of June. A huge difference when compared to the same period of year 2021 which was only 122,835 (National Center for Statistics and Information 2022b, 2022c, 2022d, 2022e), indicating that the six-pillar recovery plan adopted by the Omani government to overcome the repercussions of the COVID-19 pandemic is effective (See Table 4).

Table 4. *Tourists Arrival Figures to Oman for the First Six Months of Year 2021 vs. Year 2022 Figures*

Month/Year	2021	2022
January	39,398	106,614
February	23,001	125,070
March	31,115	183,048
April	13,363	162,688
May	6,036	216,348
June	9,922	233,097
Total	**122,835**	**1,026,865**

Adapted from: National Center for Statistics and Information 2022b, 2022c, 2022d, 2022e).

Remarkably the number of classified hotels increased in 2022 to reach a total of 630 property/unit (See Table 5) with an increase of 18 property/unit of the previous year 2021 (612 property/unit). In 2022 all accommodation categories increased or remained the same, except for the four-star category, which decreased by one, the highest increase number-wise was the "Guest Houses" and the "Green Lodge" categories which increased by 6 units each. The highest increase percentage-wise was the "Heritage Lodge" category, by a 40% increase of the previous year 2021 (5 property/unit). A closer look at the total number of the classified hotels figures would indicate that the total number in 2022 is higher than the total number in 2019 which is just before the COVID-19 pandemic, by138 property/unit, translated to an increase of 28%.

Table 5. *Number of Classified Hotels 2019-2022 (End of March)*

Classification	2019	2020	2021	2022
5 Star	26	28	27	28
4 Star	23	26	28	27
3 Star	38	44	55	56
2 Star	55	62	62	64
1 Star	80	81	88	88
Chalet and Rest houses	33	35	37	37
Guest Houses	41	53	77	83
Green Lodge	25	37	53	59
Heritage Lodge	4	5	5	7
Hotel Apartments	145	153	158	159
Tourism Camp	22	23	22	22
Total	**492**	**547**	**612**	**630**

Adapted from: Ministry of Heritage and Tourism (2022a).

The increase in the number of hotels and types is based on and follows the Omani Tourism Strategy 2040 preset expansion plans. The development pace and figures follow the strategy phases and depend on the assessed tourism demand and industry needs. The Oman Tourism Strategy 2040 first phase (2016-2020) aims to develop more than 5,620 new hotel rooms. Table 6 proves that the planned figures were exceeded, the number in 2015 totaled to 16,691 rooms which has risen in 2020 to reach 26,733 rooms, which is more than 10,000 added rooms during the first phase of the strategy. These increases during a global crisis indicate that the plans were followed despite the pandemic, which is commendable, it is worth mentioning that the construction of a hotel property takes years requiring investments/costs be already allocated and secured by means of binding national and international agreements. What if the pandemic lasted longer? Would these investments be in vain? Should all tourism plans be put on hold till the circumstances change? Or should all plans be followed in order to be ready for the post-pandemic era? The answer to these questions depends on: The decision maker experience/discretion, funds availability, and nature of the crisis at hand.

Table 6. *Total Number of Hotel Rooms in Oman (2016-2021)*

Year	Number of Hotel Rooms
2015	16,691
2016	18,420
2017	19,520
2018	22,182
2019	25,408
2020	26,733
2021	29,056

Adapted from: Ministry of Heritage and Tourism (2022a).

Tourism Registered Activities and Employment Figures

Tourism Registered Activities

Tourism registered activities are the operations/businesses registered at the Omani Ministry of Labour and fall under the umbrella of tourism and hospitality, each activity has two identifiers: "Name" and "Code".

Tourism entails services and industries such as: Accommodation, food and beverage, transportation, retail stores, activities, and entertainment that together form memorable experiences for persons traveling away from their regular place of residence (Goeldner and Ritchie 2012, Kasavana 2013, Leiper 1990). In Table 7, the Omani tourism registered activities were classified under the previously mentioned tourism related services/industries then tabulated and ordered. The majority of the registered activities fall under the "Activities & Entertainment" category, which comprises 29 registered activities.

The study included the analysis of years 2019, 2020, 2021, and 2022 (till end of March) registered tourism activities. A total of 74 activities were seen over the study years. Table 8 demonstrates by years the licenced activities number, and names the activities not included out of the total 74 activities available throughout the study years. A slight variation is seen over the study years, year 2021 shows the highest number of registered activities with 73 activities.

Tourism industries and its activities have to conform to the definitions and criteria indicated in the Standard International Classification of Tourism Activities (SICTA) and the Tourism Satellite Account (TSA) created by the United Nations World Tourism Organization (UNWTO) which define tourism industries as all establishments whose principal productive activity is a tourism characteristic activity (TCA). Tourism Characteristic Activities are the activities that typically produce tourism characteristic products (TCP). Tourism characteristic products are those that fulfil the following: The product share of the total tourism expenditure is significant, and/or the product would fail to exist without tourists (UN and UNWTO 1994, UNWTO 2000, UN 2008, UN and UNWTO 2008).

In its current status the "Food and Beverage" category components of the "Registered Tourism Activities" are questionable, implying that the list needs to be reviewed and filtered. According to Oman's tourism law implementing regulations issued by the Ministry of Tourism in 2016 by the Ministerial Decision No. 39/ 2016, (In 2016 The Ministry was still called "Ministry of Tourism" without the Heritage responsibilities) in Article 1: "Classified Restaurants are: Restaurants licensed by the concerned authority and classified according to the requirements of the Ministry's classification system". And in Article 50: "A restaurant is considered classified if it obtains the classification level plate from the Ministry, and the classification is valid for 1 (one) year". Furthermore, according to Annex 1 of the same regulatory act there is a classification fee of 200 Omani Riyals required for the application processing besides the fulfilment of some requirements and the submission of the needed documentations which are mentioned in Article 49: "A restaurant licensed by the assigned municipality may apply for a classification from the Ministry in accordance with the following requirements: 1. The restaurant must have been in existence for a period of no less than a year. 2. Passing the requirements and standards of the approved restaurant classification system in terms of facilities, service, and quality".

Table 7. *Registered Activities Categorization Based on 2019 (End of December) till 2022 (End of March) Registerer*

s/n	Accommodation	Food and Beverage	Transportation	Retail Stores	Activities & Entertainment
1	chalets and rest houses	bars	airport passenger land transport services	botanical gardens and flowers operation	acting activities
2	green lodges	cafés that mainly serve drinks	in-city land transport of passengers (busses - scheduled)	operating and marketing duty free shops	activities of independent journalists
3	guest houses	cafés that serve meals mainly	in-city rail transport of passengers	retail in specialized pottery and handicraft stores	beach buggy rental
4	heritage lodges	catering companies	land transport of passengers (busses - non-scheduled)	retail in specialized souvenir, antique and painting stores	bicycle rental
5	hotel apartments	fast food stores	marine transport of passengers (sea and coastal water transport)	retail in specialty silverware and gift stores	diving tool rental
6	hotels, motels, and resorts	fish and seafood grill shops	marine transport of passengers (internal water transport)	retail in specialty stores for Omani daggers	entertainment and gaming city activities
7	other activities for camp areas and theme parks that offer a place for cars and parks that offer a place for trailers	grilled meat shops	other activities for other types of land transport of passengers		entertainment games activities and electronic simulation systems
8	other activities for other accommodation facilities	ice cream shops	passenger air transport		hosting artistic bands
9	other activities for short-term accommodation activities	juice shops	rental of land means of transport of goods (without driver)		medical coordination offices
10	tourist camps	other activities for beverage activities	rental of land means of transport of passengers (with driver)		mobile entertainment games activities
11		other activities for other food service activities	rental of land means of transport of passengers (without driver)		motorcycle rental
12		other activities for restaurant activities and mobile food services	rental of mobile caravans		museums operation of all kinds
13		restaurants	transport of pilgrims		operation and preservation of historic sites and buildings
14		restaurants and canteens of public facilities			operation of ski lifts
15		selling corn			organizing parties
16		shisha café			organizing sports events
17					other activities for creative, arts and entertainment activities
18					other activities for other entertainment activities that are not classified elsewhere
19					other activities for other sports activities
20					rental of boats
21					rental of leisure and sports tools and equipment

22					stable activities
23					theme park and beach activities
24					ticket sales activities for entertainment events
25					ticket sales activities for theatrical events
26					tour operator activities
27					tourism promotion activities (marketing of domestic tourism)
28					tourist adventures
29					travel agency activities

Adapted from: Ministry of Heritage and Tourism (2022b).

Table 8. *Registered Activities Availability/Continuity 2019 (End of December) till 2022 (End of March)*

S/N	Registered Activities (End of December 2019)		Registered Activities (End of December 2020)		Registered Activities (End of December 2021)		Registered Activities (End of March 2022)	
	Available	Missing	Available	Missing	Available	Missing	Available	Missing
1		hosting artistic bands						
2		in-city rail transport of passengers						in-city rail transport of passengers
3	70		71	marine transport of passengers (internal water transport)	73	marine transport of passengers (internal water transport)	70	marine transport of passengers (internal water transport)
4		operation of ski lifts						operation of ski lifts
5		other activities for other accommodation facilities		other activities for other accommodation facilities				other activities for other accommodation facilities
6				rental of mobile caravans				

Adapted from: Ministry of Heritage and Tourism (2022b).

Referring to SICTA and the TSA in addition to Oman's tourism law implementing regulations, the ice cream, corn, and juice selling shops besides the rest of the "Food and Beverage" category list do not fulfil the conditions nor adhere to the standards, they should be removed from the "Registered Tourism Activities", their inclusion affects the validity of the tourism statistics with regard to revenues, employment figures, and consequently, the Omanization percentages. This issue was stressed in research, some countries who receive a significant number of tourists have statistical reporting systems that needs to be scientifically updated to better reflect the actual status, size, and market share (Volo 2020).

Employment Figures

Oman's tourism sector suffered severely of the COVID-19 pandemic outcomes. Many SMEs in the sector were unable to secure staff salaries/payments which resulted in high employee turnover and the unfortunate loss of jobs (Al Hanai and Matriano 2021, Al Hasni 2021). Analysis of the tourism workforce figures in Oman shows a gradual decrease from year 2019, throughout years 2020 and 2021, then ends up with a slight increase in year 2022 (end of March) but still far from year 2019 (See Table 9). The decrease in the Omani workforce reached its maximum in year 2021, the industry lost 2,365 Omani employees during the COVID-19 pandemic, which is nearly 14% of the Omani workforce. The same decrease and gradual increase happened with the non-Omani workforce. The decrease in the non-Omani workforce reached its maximum in year 2021, the industry lost 23,964 non-Omani employees, which is nearly 17% of the non-Omani workforce. The overall decrease in the tourism workforce, which reached its maximum in 2021, was 26,329 employees (Omani and Non-Omani), which is nearly 16.7% of the total workforce. The economic and social benefits generated by the tourism and hospitality sector is undeniable, as an employer it can provide several opportunities to a wide spectrum of job seekers, people of different ages, educational background and physical capabilities (Baum and Szivas 2008), but

the fact that tourism is highly affected by the slightest of incidents that happen worldwide makes its contributions somehow precarious (Blake and Sinclair 2003, Lee et al. 2015, McDowell et al. 2009, Robinson et al. 2019). In fact, the tourism and hospitality industry is a vulnerable economic sector that can support countries' economic growth and social development till a crisis happens anywhere in the world even though not related to tourism and hospitality (De Bruyn et al. 2018).

As a role of thumb, all statistics that deal with employment and manpower In the Sultanate of Oman have an additional column (Omanization %), Omanization (Localization) of the workforce is the process of training and developing Omanis skills and competences, aiming to decrease dependence on non-Omani workforce and eventually replacement with Omani personnel (Atef and Al Balushi 2017, Law et al. 2004, Wong and Law 1999). Noticeably, year 2021 registered an Omanization percentage of 10.8 which is higher than the percentage registered in 2019 (the year with the highest Omani workforce figure of the study years), and so close to year 2020 (10.9%) (the year with the second highest Omani workforce figure of the study years), although year 2022 (end of March) showed an increase in the Omani workforce, it still registered a lower Omanization percentage (10.5%) than year 2021.

Table 9. *Tourism Workforce 2019 (End of December) till 2022 (End of March)*

Year	Omani Workforce			Non-Omani Workforce			Overall Total	Omanization
	Male	Female	Total	Male	Female	Total		
2019 (End of December)	11781	4669	16450	134572	6205	140777	157227	10.5%
2020 (End of December)	11272	4251	15523	121410	5314	126724	142247	10.9%
2021 (End of December)	10160	3925	14085	111941	4872	116813	130898	10.8%
2022 (End of March)	10280	4098	14378	116812	5109	121921	136299	10.5%

Adapted from: Ministry of Heritage and Tourism (2022b).

Overall, the Omanization figures are nearly frozen and have not significantly changed/increased over a period of four years. There is a pressing need to accelerate the Omanization process and increase the number of citizens joining the industry sectors. There are several factors that hinder Omanis from joining the industry, some of them are related to the image of the industry as perceived by the society and some are related to the industry nature and work environment. Although the industry provides several employment opportunities, the citizens are not motivated to make use of such opportunities. A dilemma that needs further study and analysis to reach the proper course of action.

Throughout the study years the top 10 licenced activities by Omanization percentage revolved around 15 activities (See Table 10).

But, when these 15 registered activities are classified under the tourism related services/industries involved in the tourism experience creation (Accommodation - Food and Beverage - Transportation - Retail Stores - Activities and Entertainment) the "Food and Beverage" category has no presence in the top 10 licenced activities by Omanization percentage:

- **Accommodation**
    1. Other activities for camp areas and theme parks that offer a place for cars and parks that offer a place for trailers
    2. Other activities for other accommodation facilities
- **Food and Beverage**
    o NONE
- **Transportation**
    3. Airport passenger land transport services
    4. In-city land transport of passengers (busses - scheduled)
    5. In-city rail transport of passengers
    6. Land transport of passengers (busses - non-scheduled)
    7. Passenger air transport
    8. Rental of land means of transport of goods (without driver)
    9. Rental of land means of transport of passengers (without driver)
- **Retail Stores**
    10. Operating and marketing duty free shops
- **Activities and Entertainment**
    11. Activities of independent journalists
    12. Mobile entertainment games activities
    13. Museums operation of all kinds
    14. Operation and preservation of historic sites and buildings
    15. Theme Park and beach activities

The registered activity with the highest number of Omanis throughout the study years was "Catering Companies" (See Table 11), but when the Omanization percentage is considered, surprisingly this registered activity does not exceed 16.4% at most, which was reached in year 2020. There is no relationship between how large the number of employed Omanis is and the Omanization percentage, the activity workforce size differs from one activity to the other, affecting the Omanization percentage. Percentages are tricky when considered without the actual figures.

It could be noticed that some activities can accommodate more Omani employees than the others, offering a window for the unemployed to find job opportunities. The "Accommodation" and the "Food and Beverage" categories which in other words is the Hospitality industry, offered more employment opportunities to Omanis than any of the other industry categories, followed by the "Transportation" category.

Taking a look at the Omani male employment in the sector, figures indicate that the "Hospitality Industry", "Transportation", and "Travel Agencies" are the top employers (See Table 12). Which is also the case with the Omani female employment in the sector (See Table 13).

Table 10. *The Top 10 Registered Activities by Omanization Percentages 2019 (End of December) till 2022 (End of March)*

S/N	Registered Activities (End of December 2019)	Omanization %	Registered Activities (End of December 2020)	Omanization %	Registered Activities (End of December 2021)	Omanization %	Registered Activities (End of March 2022)	Omanization %
1	other activities for camp areas and theme parks that offer a place for cars and parks that offer a place for trailers	100.0%	in-city rail transport of passengers	100.0%	in-city rail transport of passengers	100.0%	other activities for camp areas and theme parks that offer a place for cars and parks that offer a place for trailers	100.0%
2	land transport of passengers (busses - non-scheduled)	90.0%	other activities for camp areas and theme parks that offer a place for cars and parks that offer a place for trailers	100.0%	other activities for camp areas and theme parks that offer a place for cars and parks that offer a place for trailers	100.0%	land transport of passengers (busses - non-scheduled)	97.0%
3	in-city land transport of passengers (busses - scheduled)	89.3%	land transport of passengers (busses - non-scheduled)	95.8%	in-city land transport of passengers (busses - scheduled)	91.2%	in-city land transport of passengers (busses - scheduled)	91.9%
4	theme park and beach activities	76.3%	in-city land transport of passengers (busses - scheduled)	91.3%	land transport of passengers (busses - non-scheduled)	85.7%	rental of land means of transport of goods (without driver)	86.0%
5	museums operation of all kinds	75.0%	museums operation of all kinds	79.4%	museums operation of all kinds	80.6%	theme park and beach activities	82.5%
6	rental of land means of transport of passengers (without driver)	70.5%	theme park and beach activities	76.8%	theme park and beach activities	79.5%	museums operation of all kinds	80.6%
7	operating and marketing duty free shops	58.1%	rental of land means of transport of passengers (without driver)	72.1%	operation and preservation of historic sites and buildings	77.8%	airport passenger land transport services	80.0%
8	passenger air transport	57.4%	passenger air transport	66.7%	other activities for other accommodation facilities	77.8%	passenger air transport	74.1%
9	activities of independent journalists	50.0%	operating and marketing duty free shops	60.0%	passenger air transport	73.3%	rental of land means of transport of passengers (without driver)	70.0%
10	mobile entertainment games activities	50.0%	activities of independent journalists	50.0%	rental of land means of transport of goods (without driver)	71.7%	operation and preservation of historic sites and buildings	68.2%

Adapted from: Ministry of Heritage and Tourism (2022b).

Table 11. *The Top 10 Registered Activities by Omanis Employment Figures 2019 (End of December) till 2022 (End of March)*

S/N	Registered Activities (End of December 2019)	Employees Number	Omanization %	Registered Activities (End of December 2020)	Employees Number	Omanization %	Registered Activities (End of December 2021)	Employees Number	Omanization %	Registered Activities (End of March 2022)	Employees Number	Omanization %
1	catering companies	3537	15.4%	catering companies	3358	16.4%	catering companies	2952	15.0%	catering companies	3064	15.1%
2	hotels, motels, and resorts	3297	29.5%	passenger air transport	3214	66.7%	hotels, motels, and resorts	2868	33.1%	hotels, motels, and resorts	2920	32.3%
3	passenger air transport	3201	57.4%	hotels, motels, and resorts	3110	31.8%	passenger air transport	2758	73.3%	passenger air transport	2739	74.1%
4	restaurants	1644	3.2%	restaurants	1484	3.3%	restaurants	1342	3.4%	restaurants	1376	3.4%
5	in-city land transport of passengers (busses - scheduled)	1405	89.3%	in-city land transport of passengers (busses - scheduled)	1357	91.3%	in-city land transport of passengers (busses - scheduled)	1212	91.2%	in-city land transport of passengers (busses - scheduled)	1195	91.9%
6	travel agency activities	1002	26.5%	travel agency activities	839	25.1%	travel agency activities	672	22.9%	travel agency activities	670	23.6%
7	rental of land means of transport of passengers (without driver)	394	70.5%	rental of land means of transport of passengers (without driver)	379	72.1%	rental of land means of transport of passengers (without driver)	353	69.2%	rental of land means of transport of passengers (without driver)	367	70.0%
8	cafés that serve meals mainly	282	1.4%	cafés that serve meals mainly	247	1.1%	cafés that serve meals mainly	303	1.2%	cafés that serve meals mainly	315	1.1%
9	cafés that mainly serve drinks	243	0.9%	theme park and beach activities	222	76.8%	cafés that mainly serve drinks	264	1.4%	cafés that mainly serve drinks	275	1.5%
10	hotel apartments	236	17.7%	cafés that mainly serve drinks	220	1.0%	theme park and beach activities	209	79.5%	theme park and beach activities	208	82.5%

Adapted from: Ministry of Heritage and Tourism (2022b).

Table 12. *The Top 10 Registered Activities by Omani Male Employment Figures 2019 (End of December) till 2022 (End of March)*

S/N	Registered Activities (End of December 2019)	Employees Number	Registered Activities (End of December 2020)	Employees Number	Registered Activities (End of December 2021)	Employees Number	Registered Activities (End of March 2022)	Employees Number
1	hotels, motels, and resorts	2685	passenger air transport	2605	hotels, motels, and resorts	2304	hotels, motels, and resorts	2346
2	passenger air transport	2579	hotels, motels, and resorts	2528	passenger air transport	2271	passenger air transport	2249
3	catering companies	2423	catering companies	2331	catering companies	2054	catering companies	2109
4	in-city land transport of passengers (busses - scheduled)	1334	in-city land transport of passengers (busses - scheduled)	1286	in-city land transport of passengers (busses - scheduled)	1146	in-city land transport of passengers (busses - scheduled)	1127
5	restaurants	766	restaurants	717	restaurants	620	restaurants	609
6	travel agency activities	485	travel agency activities	420	travel agency activities	334	travel agency activities	338
7	rental of land means of transport of passengers (without driver)	322	rental of land means of transport of passengers (without driver)	310	rental of land means of transport of passengers (without driver)	289	rental of land means of transport of passengers (without driver)	308
8	theme park and beach activities	170	theme park and beach activities	165	theme park and beach activities	156	theme park and beach activities	155
9	hotel apartments	162	hotel apartments	133	cafés that mainly serve drinks	138	cafés that mainly serve drinks	145
10	tour operator activities	122	cafés that mainly serve drinks	105	cafés that serve meals mainly	120	cafés that serve meals mainly	122

Adapted from: Ministry of Heritage and Tourism (2022b).

Table 13. *The Top 10 Registered Activities by Omani Female Employment Figures 2019 (End of December) till 2022 (End of March)*

S/N	Registered Activities (End of December 2019)	Employees Number	Registered Activities (End of December 2020)	Employees Number	Registered Activities (End of December 2021)	Employees Number	Registered Activities (End of March 2022)	Employees Number
1	catering companies	1114	catering companies	1027	catering companies	898	catering companies	955
2	restaurants	878	restaurants	767	restaurants	722	restaurants	767
3	passenger air transport	622	passenger air transport	609	hotels, motels, and resorts	564	hotels, motels, and resorts	574
4	hotels, motels, and resorts	612	hotels, motels, and resorts	582	passenger air transport	487	passenger air transport	490
5	travel agency activities	517	travel agency activities	419	travel agency activities	338	travel agency activities	332
6	cafés that serve meals mainly	162	cafés that serve meals mainly	145	cafés that serve meals mainly	183	cafés that serve meals mainly	193
7	cafés that mainly serve drinks	124	cafés that mainly serve drinks	115	cafés that mainly serve drinks	126	cafés that mainly serve drinks	130
8	hotel apartments	74	in-city land transport of passengers (busses - scheduled)	71	hotel apartments	67	hotel apartments	72
9	rental of land means of transport of passengers (without driver)	72	rental of land means of transport of passengers (without driver)	69	in-city land transport of passengers (busses - scheduled)	66	in-city land transport of passengers (busses - scheduled)	68
10	in-city land transport of passengers (busses - scheduled)	71	hotel apartments	63	rental of land means of transport of passengers (without driver)	64	rental of land means of transport of passengers (without driver)	59

Adapted from: Ministry of Heritage and Tourism (2022b).

Table 14 represents the top 25 posts according to Omanization percentages (End of March 2022). It is worth noting that 207 posts are available to Omanis only (non-Omani are not allowed to be employed in these jobs) under Article 1 of the new Labour Law (Ministry of Labour 2022). The posts mentioned in Table 14 are among the 207 exclusive posts, for this reason there is no representation of the non-Omani workforce within the top 25 posts by Omanization percentage, and an Omanization percentage of 100 is the result shown for these mentioned posts.

The following Table (15) is a representation of the Top 25 posts by Omanis employment figures (End of March 2022). The top post is working as "Air Host/Hostess", aviation is a huge sector, so it comes as no surprise that it employs that much of Omanis among other nationalities. Gender-wise, The same result was reached in Table 16 that shows the top 25 Posts by Omani male employment figures (End of March 2022), travelling seems to attract Omani males, while Table 17 that shows the top 25 Posts by Omani female employment figures for the same time period surprisingly indicate that "Food Waiter" was the post with the highest female employment figure despite the hard and demanding nature of the waitering duties, followed by "Cleaning Worker", it is noticeable that the majority of the hospitality industry housekeeping and cleaning posts are occupied by females who excel in doing the required tasks, a trend that is also assured by industry figures in Oman.

Table 14. *Top 25 Posts by Omanization Percentages (End of March 2022)*

s/n	Activity	Post	Omani Workforce			Non-Omani Workforce			Overall Total			Omanization %
			Male	Female	Total	Male	Female	Total	Male	Female	Total	
1	in-city land transport of passengers (busses - scheduled)	bus driver	508	0	508	0	0	0	508	0	508	**100.0%**
2	in-city land transport of passengers (busses - scheduled)	driver of all vehicles	320	0	320	0	0	0	320	0	320	**100.0%**
3	hotels, motels, and resorts	reception clerk (hotel)	190	101	291	0	0	0	190	101	291	**100.0%**
4	hotels, motels, and resorts	guard	260	12	272	0	0	0	260	12	272	**100.0%**
5	catering companies	driver of all vehicles	266	0	266	0	0	0	266	0	266	**100.0%**
6	hotels, motels, and resorts	security guard	234	13	247	0	0	0	234	13	247	**100.0%**
7	rental of land means of transport of passengers (without driver)	driver of all vehicles	170	0	170	0	0	0	170	0	170	**100.0%**
8	restaurants	public relations clerk	63	107	170	0	0	0	63	107	170	**100.0%**
9	passenger air transport	tickets clerk	81	66	147	0	0	0	81	66	147	**100.0%**
10	passenger air transport	passenger services clerk	92	48	140	0	0	0	92	48	140	**100.0%**
11	hotels, motels, and resorts	driver of all vehicles	126	0	126	0	0	0	126	0	126	**100.0%**
12	restaurants	cashier	55	70	125	0	0	0	55	70	125	**100.0%**
13	passenger air transport	administrative clerk (general)	68	28	96	0	0	0	68	28	96	**100.0%**
14	catering companies	administrative clerk (general)	15	67	82	0	0	0	15	67	82	**100.0%**
15	catering companies	guard	77	0	77	0	0	0	77	0	77	**100.0%**
16	hotels, motels, and resorts	reception clerk (general)	55	22	77	0	0	0	55	22	77	**100.0%**
17	catering companies	reception clerk (general)	36	41	77	0	0	0	36	41	77	**100.0%**
18	cafés that serve meals mainly	public relations clerk	29	47	76	0	0	0	29	47	76	**100.0%**
19	restaurants	administrative clerk (general)	13	55	68	0	0	0	13	55	68	**100.0%**
20	passenger air transport	training pilot	58	0	58	0	0	0	58	0	58	**100.0%**

21	hotels, motels, and resorts	public relations clerk	52	6	58	0	0	0	52	6	58	**100.0%**
22	land transport of passengers (busses - non-scheduled)	driver of all vehicles	57	0	57	0	0	0	57	0	57	**100.0%**
23	catering companies	public relations clerk	35	22	57	0	0	0	35	22	57	**100.0%**
24	passenger air transport	administrative coordinator	27	29	56	0	0	0	27	29	56	**100.0%**
25	passenger air transport	telephone communications clerk	34	19	53	0	0	0	34	19	53	**100.0%**

Adapted from: Ministry of Heritage and Tourism (2022b).

Table 15. *Top 25 Posts by Omanis Employment Figures (End of March 2022)*

s/n	Activity	Post	Omani Workforce			Non-Omani Workforce			Overall Total			Omanization %
			Male	Female	Total	Male	Female	Total	Male	Female	Total	
1	passenger air transport	air host/hostess	657	121	**778**	4	706	710	661	827	1488	52.3%
2	catering companies	cleaning worker/ public buildings	460	150	**610**	1588	13	1601	2048	163	2211	27.6%
3	in-city land transport of passengers (busses - scheduled)	bus driver	508	0	**508**	0	0	0	508	0	508	100.0%
4	catering companies	food waiter	183	231	**414**	2768	310	3078	2951	541	3492	11.9%
5	passenger air transport	commercial pilot	400	10	**410**	71	3	74	471	13	484	84.7%
6	in-city land transport of passengers (busses - scheduled)	driver of all vehicles	320	0	**320**	0	0	0	320	0	320	100.0%
7	hotels, motels, and resorts	reception clerk (hotel)	190	101	**291**	0	0	0	190	101	291	100.0%
8	hotels, motels, and resorts	guard	260	12	**272**	0	0	0	260	12	272	100.0%
9	catering companies	driver of all vehicles	266	0	**266**	0	0	0	266	0	266	100.0%
10	passenger air transport	jet maintenance technician	260	6	**266**	32	0	32	292	6	298	89.3%
11	hotels, motels, and resorts	security guard	234	13	**247**	0	0	0	234	13	247	100.0%
12	catering companies	cleaning worker/hotel rooms	240	4	**244**	42	2	44	282	6	288	84.7%
13	restaurants	food waiter	121	70	**191**	10099	510	10609	10220	580	10800	1.8%
14	hotels, motels, and resorts	chef (general)	108	80	**188**	641	52	693	749	132	881	21.3%

15	hotels, motels, and resorts	food waiter	159	15	**174**	835	325	1160	994	340	1334	13.0%
16	rental of land means of transport of passengers (without driver)	driver of all vehicles	170	0	**170**	0	0	0	170	0	170	100.0%
17	restaurants	public relations clerk	63	107	**170**	0	0	0	63	107	170	100.0%
18	catering companies	utensils cleaner	144	11	**155**	2332	2	2334	2476	13	2489	6.2%
19	passenger air transport	tickets clerk	81	66	**147**	0	0	0	81	66	147	100.0%
20	hotels, motels, and resorts	cleaning worker/hotel rooms	128	13	**141**	868	93	961	996	106	1102	12.8%
21	travel agency activities	tickets clerk	39	102	**141**	2	1	3	41	103	144	97.9%
22	passenger air transport	passenger services clerk	92	48	**140**	0	0	0	92	48	140	100.0%
23	hotels, motels, and resorts	driver of all vehicles	126	0	**126**	0	0	0	126	0	126	100.0%
24	restaurants	cashier	55	70	**125**	0	0	0	55	70	125	100.0%
25	catering companies	chef (general)	83	20	**103**	3230	4	3234	3313	24	3337	3.1%

Adapted from: Ministry of Heritage and Tourism (2022b).

Table 16. *Top 25 Posts by Omani Male Employment Figures (End of March 2022)*

s/n	Activity	Post	Omani Workforce			Non-Omani Workforce			Overall Total			Omanization %
			Male	**Female**	**Total**	**Male**	**Female**	**Total**	**Male**	**Female**	**Total**	
1	passenger air transport	air host/hostess	**657**	121	778	4	706	710	661	827	1488	52.3%
2	in-city land transport of passengers (busses - scheduled)	bus driver	**508**	0	508	0	0	0	508	0	508	100.0%
3	catering companies	cleaning worker/ public buildings	**460**	150	610	1588	13	1601	2048	163	2211	27.6%
4	passenger air transport	commercial pilot	**400**	10	410	71	3	74	471	13	484	84.7%
5	in-city land transport of passengers (busses - scheduled)	driver of all vehicles	**320**	0	320	0	0	0	320	0	320	100.0%
6	catering companies	driver of all vehicles	**266**	0	266	0	0	0	266	0	266	100.0%
7	hotels, motels, and resorts	guard	**260**	12	272	0	0	0	260	12	272	100.0%
8	passenger air transport	jet maintenance technician	**260**	6	266	32	0	32	292	6	298	89.3%

9	catering companies	cleaning worker/hotel rooms	**240**	4	244	42	2	44	282	6	288	84.7%
10	hotels, motels, and resorts	security guard	**234**	13	247	0	0	0	234	13	247	100.0%
11	hotels, motels, and resorts	reception clerk (hotel)	**190**	101	291	0	0	0	190	101	291	100.0%
12	catering companies	food waiter	**183**	231	414	2768	310	3078	2951	541	3492	11.9%
13	rental of land means of transport of passengers (without driver)	driver of all vehicles	**170**	0	170	0	0	0	170	0	170	100.0%
14	hotels, motels, and resorts	food waiter	**159**	15	174	835	325	1160	994	340	1334	13.0%
15	catering companies	utensils cleaner	**144**	11	155	2332	2	2334	2476	13	2489	6.2%
16	hotels, motels, and resorts	cleaning worker/hotel rooms	**128**	13	141	868	93	961	996	106	1102	12.8%
17	hotels, motels, and resorts	driver of all vehicles	**126**	0	126	0	0	0	126	0	126	100.0%
18	restaurants	food waiter	**121**	70	191	10099	510	10609	10220	580	10800	1.8%
19	hotels, motels, and resorts	chef (general)	**108**	80	188	641	52	693	749	132	881	21.3%
20	passenger air transport	passenger services clerk	**92**	48	140	0	0	0	92	48	140	100.0%
21	catering companies	chef (general)	**83**	20	103	3230	4	3234	3313	24	3337	3.1%
22	hotels, motels, and resorts	utensils cleaner	**82**	4	86	159	3	162	241	7	248	34.7%
23	passenger air transport	tickets clerk	**81**	66	147	0	0	0	81	66	147	100.0%
24	cafés that mainly serve drinks	coffee shop waiter	**81**	15	96	4001	137	4138	4082	152	4234	2.3%
25	catering companies	guard	**77**	0	77	0	0	0	77	0	77	100.0%

Adapted from: Ministry of Heritage and Tourism (2022b).

Table 17. *Top 25 Posts by Omani Female Employment Figures (End of March 2022)*

s/n	Activity	Post	Omani Workforce			Non-Omani Workforce			Overall Total			Omanization %
			Male	Female	Total	Male	Female	Total	Male	Female	Total	
1	catering companies	food waiter	183	**231**	414	2768	310	3078	2951	541	3492	11.9%
2	catering companies	cleaning worker/ public buildings	460	**150**	610	1588	13	1601	2048	163	2211	27.6%
3	passenger air transport	air host/hostess	657	**121**	778	4	706	710	661	827	1488	52.3%
4	restaurants	public relations clerk	63	**107**	170	0	0	0	63	107	170	100.0%
5	travel agency activities	tickets clerk	39	**102**	141	2	1	3	41	103	144	97.9%
6	hotels, motels, and resorts	reception clerk (hotel)	190	**101**	291	0	0	0	190	101	291	100.0%
7	catering companies	hospital cleaning worker	15	**82**	97	50	1	51	65	83	148	65.5%
8	hotels, motels, and resorts	chef (general)	108	**80**	188	641	52	693	749	132	881	21.3%
9	restaurants	cashier	55	**70**	125	0	0	0	55	70	125	100.0%
10	restaurants	food waiter	121	**70**	191	10099	510	10609	10220	580	10800	1.8%
11	catering companies	administrative clerk/general	15	**67**	82	0	0	0	15	67	82	100.0%
12	passenger air transport	tickets clerk	81	**66**	147	0	0	0	81	66	147	100.0%
13	restaurants	administrative clerk/general	13	**55**	68	0	0	0	13	55	68	100.0%
14	passenger air transport	passenger services clerk	92	**48**	140	0	0	0	92	48	140	100.0%
15	cafés that serve meals mainly	public relations clerk	29	**47**	76	0	0	0	29	47	76	100.0%
16	restaurants	coordinator	3	**42**	45	0	0	0	3	42	45	100.0%
17	catering companies	food services supervisor	50	**42**	92	1296	29	1325	1346	71	1417	6.5%
18	catering companies	reception clerk (general)	36	**41**	77	0	0	0	36	41	77	100.0%
19	restaurants	public accountant	12	**37**	49	18	0	18	30	37	67	73.1%
20	travel agency activities	travel agent	8	**37**	45	964	98	1062	972	135	1107	4.1%

21	restaurants	food services supervisor	20	**34**	54	2303	164	2467	2323	198	2521	2.1%
22	restaurants	reception clerk (general)	4	**31**	35	0	0	0	4	31	35	100.0%
23	passenger air transport	administrative coordinator	27	**29**	56	0	0	0	27	29	56	100.0%
24	passenger air transport	administrative clerk/general	68	**28**	96	0	0	0	68	28	96	100.0%
25	cafés that mainly serve drinks	public relations clerk	13	**26**	39	0	0	0	13	26	39	100.0%

Adapted from: Ministry of Heritage and Tourism (2022b).

The population figures and the Omani tourism workforce figures were tabulated and cross compared to indicate the contribution of Omanis to the industry and the industry attractiveness as an employment option. In general, according to year 2021 population and tourism workforce figures, the tourism workforce represent 2.9% of the total population of Oman (Omani and Non-Omani). The Total Omanis working in the field out of the total Omani population (Omanis only) does not exceed 0.5%. Out of the total Omani males population 0.72% work in tourism, and only 0.28% of the total Omani females work in the sector (See Table 18).

Table 18. *End of December 2021 Tourism Workforce Vs Country's Population*

End of December 2021 Statistics	Omani Workforce			Non-Omani Workforce			Overall Total
	Male	**Female**	**Total**	**Male**	**Female**	**Total**	**Total**
Population	1,412,508	1,391,609	2,804,117	1,348,646	374,683	1,723,329	4,527,446
Tourism Workforce	10160	3925	14085	111941	4872	116813	130898
Percentage of Tourism Workforce/Gender/ Population	0.72%	0.28%	0.50%	8.3%	1.3%	6.8%	2.9%

Adapted from: National Center for Statistics and Information (2022a); Ministry of Heritage and Tourism (2022b).

Conclusions and Implications of the Study

Conclusions

The study revealed some important facts based on the analysis of the official figures about the Omani tourism and hospitality industry just before, during, and after the COVID-19 pandemic.

The effect of the COVID-19 pandemic on the Omani tourism and hospitality industry revenues and employment was enormous. Massive decrease in tourists arrivals, loss of revenues, and sever job losses. The Small and Medium Enterprises (SMEs) in the tourism sector were unable to cope and had to cut employee pays. The ramifications of the pandemic left no space for maneuverability leading to a radical decrease of business and consequently, loss of revenues.

There needs to be a systematic offer of support to tourism and hospitality stakeholders to heal the sector. The creation of a government/industry crisis recovery fund scheme to face any future incidents should be considered.

Tracking and analyzing the industry employment figures (End of December 2019 till end of March 2022) led us to understand the COVID-19 pandemic negative effect on the industry workforce size. The overall number of employees who migrated the tourism workforce, which reached its maximum in 2021, was 26,329 employees (Omani and Non-Omani), which is nearly 16.7% of the total workforce. The industry lost 2,365 Omani employees during the COVID-19 pandemic, which is nearly 14% of the Omani workforce and lost 23,964 non-Omani employees, which is nearly 17% of the non-Omani workforce. The decrease in the industry employment figures in general and that of the Omanis was affected by the COVID-19 pandemic but other factors could have a significant effect as well: Employment law (some jobs are only available to Omanis and non-

Omanis are not allowed to join them), retirement schemes, movement of personnel towards other industries, and the attractiveness of government and military employments to Omanis leading to industry abandonment.

Some industry activities/positions have more Omani employments than the others. Gender comparisons revealed discrepancies between Omani male and female employment figures in favor of males. Analysis of the statistics also allowed to realize which activities/positions have the highest Omani male and female employments. Nationality (Omani - Non-Omani) comparisons were conducted that revealed the dominance of expats employment in the different industry sectors/activities. The Omanization figures for the studied time period (End of December 2019 till end of March 2022) are between 10.5-10.9 % of the total industry workforce size. Figures of Omanis employed in the tourism and hospitality industry (End of December 2021) out of the whole Omani population for the same period is small (0.5%). There is a pressing need to accelerate the Omanization process and increase the number of citizens joining the industry sectors. The factors that hinder Omanis from joining the industry need to be studied and resolved.

The tourism and hospitality registered activities reached 74 in total (End of December 2019 till end of March 2022). Some tourism and hospitality registered activities were present in some years and missing in others. Some of the tourism and hospitality registered activities do not belong to the tourism and hospitality sector nor those relating to it. Not all operations/businesses registered at the Omani Ministry of Labour and related to food and beverage should be registered as "Tourism Activities". In view of the Standard International Classification of Tourism Activities (SICTA) the list of tourism and hospitality registered activities should be reviewed and filtered to better reflect the actual industry performance.

The Omani Tourism Strategy 2040 needs to be revised to assure the validity of the planned goals and figures, after the pandemic, there might be a need for updates and amendments to assure that the strategy is still on the right track.

Theoretical Implications

This study provides an informed scientific overview to scholars, policy makers, and industry affiliates of the turbulent situation faced by the Omani tourism and hospitality industry because of the COVID-19 pandemic. It also demonstrates the pandemic recovery strategies adopted by the Government of the Sultanate of Oman to revive the industry.

The study demonstrates the concept of "Omanization" within the context of tourism and hospitality, gives a general perspective of the Omani Tourism Strategy 2040 and the related expansion plans in the tourism and hospitality sector to increase its contribution to citizens employment plans.

The study contributes to the efforts made to study crises. It demonstrates a study model with methods adopted, analysis techniques applied, interpretations, and implications that might serve as guidelines for other research projects.

Furthermore, the paper contributes to the literature on the Omani tourism and hospitality sector, explains its resources, structure, and employment patterns. It

provides some basic knowledge of the Omani tourism law and the law implementing regulations.

Managerial Implications

The current study sheds light on the Omani tourism and hospitality industry performance and stature before, during, and after the COVID-19 pandemic. Policy makers, scholars, and stakeholder would find a thorough analysis of the figures pertaining to different aspects of the industry that would inform decision making for current/future plans and developmental actions.

The results of the study contributes to understanding the industry related issues that should be targeted and solved by Oman as a tourism destination to overcome any future crises. Policy and decision makers would benefit from the analysis and facts reached on the nature and composition of the industry employment structure.

According to the study, the Omanization policies should be reviewed and accelerated. Although the industry provides several employment opportunities, the citizens are not motivated to make use of such opportunities. A dilemma that needs further study and analysis to reach the proper course of action.

The methodology adopted to generate industry statistics should be corrected and improved, industry related registered activities and employment figures should be filtered, the actual filtered figures might decrease Omanization percentages or revenues generated and consequently the industry contribution to the gross domestic product (GDP) but would allow for better planning and management of the sector. The current status leads only to a vulnerable industry structure that cannot overcome any hurdles or unfavorable circumstances.

Limitations and Future Research Agenda

This study is based on secondary data analysis which were acquired/collected from the reports, statistics, and figures of the Omani Ministry of Heritage and Tourism, the NCSI, and the UNWTO.

Study figures show the number of industry affiliates who migrated their jobs because of the COVID-19 pandemic, the significant decrease in tourists' arrivals, and consequently revenues, but no study has yet attempted to assess the costs needed to revive back the Omani tourism industry sectors to the full capacity.

It is not within the scope of the current study to assess the reasons that hinder Omanis from joining the tourism and hospitality industry workforce; but based on the current study analysis and reached facts a thorough study of the push and pull factors that affect Omanis participation in the industry is needed.

A study is proposed to be conducted on the Omani tourism and hospitality academic and professional training institutions in order to discover whether their intake/graduates' figures are in alignment with the planned Omani Tourism Strategy 2040 expansions, and whether they would be able to supply the current and future industry manpower demand or not. The inability to fulfill the industry

required manpower demand would increase the dependence on the non-Omani workforce, a consequence that would negatively affect the aspired Omanization plans of the sector.

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