

TOURISM RESEARCH WEBINAR

*"Advancing Tourism Growth and Development through Research:
COVID-19 impacts and potential opportunities"*



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA



*“Advancing Tourism Growth and Development
through Research: COVID-19 impacts and
potential opportunities”*

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I. INTRODUCTION

The revised 2017 National Tourism Sector Strategy (NTSS) recognises research as one of the key success factors for sustainable competitiveness in destination management and emphasises the important role research plays to guide planning and decision making. The strategy highlights the need to build partnerships and collaboration to strengthen the context, use and dissemination of research findings in order to inform policy, planning and decision making. It is on this basis that the Department of Tourism strives to collaborate with institutions of higher learning to conduct tourism research.

In 2010, the Department initiated engagements with several universities to foster collaboration on tourism research and enhance capacity within the tourism sector. These engagements culminated in the Department signing Memoranda of Understanding (MoUs) with five (5) universities offering tourism qualifications in 2012. These universities were University of Pretoria (UP), University of Johannesburg (UJ), University of KwaZulu-Natal (UKZN), University of Venda (UNIVEN) and Cape Peninsula University of Technology (CPUT). The main aim of the MoUs was to foster collaboration, enhance research capacity within the tourism sector and provide financial support to post-graduate students pursuing tourism-related studies.

The collaboration with the universities produced quality research outputs which assisted to inform planning, policy, programmes and decision making to grow and develop the sector. The research outputs include reports, frameworks and models which were subjected to peer review and quality assurance by the Research Policy Expert Forum, a panel appointed by the Minister of Tourism to undertake this work. The research reports can be accessed on the Department's Tourism Knowledge Portal: <https://tkp.tourism.gov.za/Research/researchpapers/Pages/default.aspx>. In addition, several workshops were hosted to capacitate sector stakeholders on the implementation on some of the following research initiatives and frameworks:

- Standardised framework to measure and assess the impacts of events of different types and sizes in different localities.

- Customer satisfaction index for the accommodation subsector with a view to improve customer service satisfaction and service quality;
- Regional cross-border tourist guide training framework, which outlines aspects of a tourist guiding course/syllabus that can be used as a baseline across the Southern African region;
- Provincial competitiveness assessment model which measures demand and supply of tourism in a province against minimum levels required to obtain a competitive market position;
- Market analysis framework for destination development which can be used by different tourism stakeholders to inform product development, infrastructure development and investment facilitation;
- Framework to enhance the sustainability of rural tourism products in South Africa from both a demand and supply perspective;
- Framework to assess the economic impact of coastal and marine tourism; and
- Framework to assess the impact of mega trends on tourism.

To ensure that research findings are useful to address the needs of stakeholders, research seminars were held annually to disseminate the research findings and study recommendations, as well as to obtain constructive feedback from a wide range of tourism stakeholders. The research seminars further provided an opportunity for students who received financial support from the Department through the MoUs with the universities, to exhibit their research work and obtain valuable feedback from sector stakeholders. To date, the Department hosted seven (7) research seminars (from 2013 to 2019). The seminars succeeded in bringing together researchers, sector stakeholders, academics and other relevant government departments to network, share ideas and best practices.

With the declaration of the COVID-19 pandemic and subsequent international and national lockdowns as well as travel restrictions, the tourism sector has been hit hard from a socio-economic perspective. This has resulted in the Department undertaking research in order to understand the severity of the impact of COVID-19 with a view to inform interventions, plans, strategies and policy decisions required to recover the sector. As such, for the financial year 2020/21, the Department prioritised, among others, two (2) COVID-19 related studies and further appointed UJ and UP to conduct the studies as follows:

| No. | Institution | Research topic |
|-----|----------------------------|---------------------------------------------------------------------------|
| 1. | University of Johannesburg | The impact of COVID-19 on the tourism sector demand and supply |
| 2. | University of Pretoria | The impact of COVID-19 on the tourism-transport interface in South Africa |

Although the country has moved to alert level one (1) as of 01 March 2021, the lockdown level still prevents mass gatherings of more than one-hundred (100) people for indoor events of which physical seminars often attracts. The Department has thus embraced online platforms to host events and keep in touch with tourism stakeholders. As such, a research webinar was hosted on 30 October 2020. Similarly, another research webinar will be hosted on 17 March 2021, under the theme: *“Advancing Tourism Growth and Development through Research: COVID-19 impacts and potential opportunities”*. The aim of the webinar is to present findings and recommendations of two (2) COVID-19-related impact studies conducted in collaboration with UJ and UP.

2. PROGRAMME

TOURISM RESEARCH WEBINAR

“Advancing Tourism Growth and Development through Research: COVID-19 impacts and potential opportunities”

Date: 17 March 2021

Time: 11:00 - 13:30

| TIME | ITEM | LED BY |
|---------------|---------------------------------------------------------|-------------------------------------------------------------------------|
| 11:00 -11:10 | Welcoming and opening remarks Purpose of the webinar | Ms Anemé Malan, Department of Tourism |
| 11:10 - 11:35 | Keynote address Introduction of speakers | Dr Unathi Sonwabile Henama, Tshwane University of Technology |
| 11:35 -12:05 | Impact of COVID-19 on tourism sector demand and supply | Prof Chris Rogerson and Prof Jayne Rogerson, University of Johannesburg |
| 12:05 -12:35 | Impact of COVID-19 on tourism-transport interface | Prof Berendien Lubbe and Dr Joachim Vermooten, University of Pretoria |
| 12:35 -13:20 | Question & answer session | Dr Unathi Sonwabile Henama, Tshwane University of Technology |
| 13:20 -13:30 | Closing remarks | Ms Anemé Malan, Department of Tourism |

3. PROFILE OF MODERATOR

Dr Unathi Sonwabile Henama is a Tourism Lecturer at the Tshwane University of Technology. He has a Doctorate in Commerce in Tourism Management from Mid Sweden University, and holds a Masters from the University of the Free State. Dr Henama has presented conference papers at both local and international conferences, and has published extensively on matters related to tourism. He has contributed book chapters in various local and international books. He has contributed chapters in various books by Van Schaik Publishers, which are prescribed in several Higher Education Institutions in South Africa. He has further established himself as the leading tourism commentator in South Africa. His engagements in public discourse associated with tourism has seen him gracing news bulletins, writing newspapers articles locally and internationally and his commentary is sought after by print, radio and news outlets.

4. PROFILES OF PRESENTERS

4.1 University of Johannesburg - The impact of COVID-19 on the tourism sector demand and supply

Prof Christian Rogerson is a Research Professor attached to the School of Tourism & Hospitality. A human geographer by training, Chris obtained a BSc (Hons) from University College, London, MSc from University of Witwatersrand and a PhD from Queen's University, Kingston, Canada. His research interests straddle issues of local and regional development, small enterprise development and tourism in the global South. Current research foci involve variously unpacking business tourism in sub-Saharan Africa; transforming local spaces through innovation and tourism; inclusive tourism and local development; the informal economy and small business incubators; and finally the historical evolution of South Africa's tourism sector.

Prof Jayne Rogerson is an Associate Professor in the School of Tourism and Hospitality at the University of Johannesburg. Her research interests include the tourism accommodation sector, sustainable development and tourism histories. Jayne has published around 80 peer

reviewed Department of Higher Education and Training (DHET) approved publications. She has been a journal editor for four special issues and in 2020 co-edited a book published by Springer titled: *New Directions in South African Tourism Geographies*. Jayne is currently co-editing two more tourism books, one for Routledge on tourism change and another one for Springer on urban tourism. In addition, Jayne continues to supervise numerous masters and doctoral students.

4.2 University of Pretoria - The impact of COVID-19 on the tourism-transport interface in South Africa

Prof Berendien Lubbe is a Senior Research Associate in the Department of Historical and Heritage Studies at the University of Pretoria and researches on emerging tourism issues. She holds a doctorate in Communication Management which she did on South Africa's image as a tourist destination in Saudi Arabia. She is an NRF-rated researcher and has published in numerous internationally accredited journals. She has also contributed to international books with her latest chapters being on the Development of African Air Transport and the Use of ICTS in the Airline Industry. Her books on Tourism Distribution and Tourism Management in South Africa have been widely prescribed. She is a past recipient of a Laureate Award from the University of Pretoria for her contribution to educational innovation. She is also project leader and principal investigator in several research projects of national priority in the fields of tourism and consults widely to industry.

5. ABSTRACTS OF RESEARCH STUDIES

5.1 The impact of COVID-19 on the tourism sector demand and supply - *University of Johannesburg*

In common with the rest of the world, the tourism sector of South Africa experienced the radical impacts of COVID-19. The magnitude of the pandemic will reshape existing patterns of tourism demand and supply which need to be understood and researched for designing appropriate policy interventions. Little knowledge exists to understand how COVID-19 has affected the supply and demand of tourism products in South Africa. It is against the

background of the rolling COVID-19 pandemic, its devastating impacts for tourism and of initiatives for re-igniting demand focused on domestic tourism that this research was undertaken.

The aim of the study is to assess the impact of COVID-19 on the demand and supply of tourism products, with a view to propose interventions to meet the needs of tourists, particularly domestic tourists, post COVID-19 through an approach of undertaking case studies of local destinations offering a different mix of tourism products. The research involved a demand-side and supply-side analysis. The demand-side involved a desk-top review of existing international literature relating to COVID-19 and consumer travel intentions. Material from 23 countries was accessed to reveal several themes about risk perceptions and consumer travel intentions as well as of changing demand preferences in the context of the continuing COVID-19 crisis. The supply-side of the research was done through the approach/lens of undertaking case studies of local destinations each of which offers a differing mix of tourism products and thus of challenges/opportunities. Three locality case studies were undertaken of tourism product clusters focused on Bela-Bela, Limpopo, Bushbuckridge, Mpumalanga and Overstrand, Western Cape. Across these areas, 60 interviews were undertaken with key private sector tourism product owners. The interview schedule was designed to determine the issues of COVID-19 impacts including responses of enterprises, their challenges and potential support requirements/interventions to address any opportunities in relation to domestic tourism.

From the demand-side and supply-side analysis, the results from this investigation point to a total of 13 policy recommendations for the Department of Tourism in addressing the impact of COVID on changing tourism demand and supply. Overall, the analysis and research findings provide the foundations of an evidence base to inform the Department of Tourism of policy opportunities in order to shape the tourism sector's supply and demand for meeting the needs and changing demands of (especially) South African domestic tourists in the COVID-19 environment.

5.2 The impact of COVID-19 on the tourism-transport interface in South Africa - University of Pretoria

The overall aim of the study was to explore the impact of COVID-19 on the Tourism-Transport Interface in South Africa with a view to proposing a scenario where this relationship might create opportunities for tourism to prosper post COVID-19. The research followed a three-step process beginning with a systematic description, based on literature and secondary data, of the overall tourism/transport interface and the modes of transport, with particular reference to air and road transport. Thereafter, interviews with senior stakeholders in the airline, bus/coach and car rental industries were conducted, with these outcomes supplemented by available statistics, providing some insight into the impact of COVID-19 on the relevant sectors. The third step in the research method was to conduct scenario planning workshops with leaders in the aviation (completed), car rental (completed) and coach/bus travel (pending) sectors. The research underscores the integral nature of transport to tourism as the enabler of accessibility to, and connectivity within, South Africa as a tourist destination. The transport/tourism interface is shown to be a highly interdependent system influenced strongly by demand, policies, infrastructure and inter-modality. While history has had a strong influence on modal choice for tourism purposes in South Africa, current pre-COVID challenges in the transport sector such as consumer behavior, transport policies and regulations, infrastructure and resource limitations are affecting international, regional and domestic tourism. One of the biggest challenges in reporting on the impact of transport for tourism and vice versa is the lack of focused data which can reflect the true nature of the interdependence of tourism and transport. Taken from various primary and secondary sources and from an international, regional and domestic perspective, this study found that most transport modes used for tourism purposes have been under pressure with little to no growth over the past number of years (pre-COVID). Rail travel as an option for tourists has decreased substantially, both regionally and domestically, there has been no real growth in coach/bus travel and declining growth in the car rental market. Private motor vehicles remain the most used for domestic tourism, particularly for purposes of VFR but the shortcomings in focused research data remains problematic in drawing accurate conclusions on this market.

The pandemic and the consequences of the various and intermittent levels of lockdown has been catastrophic for the tourism transport sector, dramatically impacting air and surface

travel, with significant adverse effects cascading through all tourism-related industries. Domestic tourism has not yet recovered to pre-COVID levels, thus while the private motor vehicle remains the most used mode of transport for tourism, it remains less than before. Car rental companies have been seriously affected with a number closing their doors, with limited airport operations severely affecting their bottom line. Metered taxis, minibus taxis (for tourism purposes) and e-Hailing services all but stopped, as tourism came to a standstill. Long distance, intercity and cross-border coach travel has been severely affected with many operators having already closed down and/or retrenched employees or adopted utilisation on a pay-for-use basis. There has been little to no government assistance for most air and surface transport modes. The total ban on cruise ships at all South African ports are affecting downstream operations severely. The impact of COVID on domestic and international air traffic was determined, as well as the traffic volumes since its outbreak. The latest forecasts indicate a recovery of up to 38% of the 2019 passenger traffic volumes. The Scenario Planning Workshops, substantiated by statistical data, when available, showed that the transport/tourism sector is currently experiencing a worst-case scenario.

Unlike previous contagious diseases, which affected air travel and other modes and where recovery could be measured against stable sectoral economic conditions and policy certainty, COVID-19 pandemic mutations, and new 'waves' of outbreaks cause tremendous uncertainty. A wide range of future scenarios, each of uncertain duration, can be envisaged. Consumer behaviour will continue to be influenced by social distancing and developments in virtual electronic communication. There is, however, some evidence of pent-up demand for travel and tourism from consumers that have been isolated and locked down for various periods. The current uncertainty, coupled with a renewed demand, implies that industry players would have to adapt to new skills, including the agility to adapt to circumstances, rapid opportunistic and exploratory reaction with a somewhat conservative initial approach during the medium-term before policy and stable economic circumstances return. This uncertainty requires a shift in the regulatory policy approach towards a more flexible and open enabling environment, maximum economic freedom for the industry to respond to market opportunities (which may be transitional) to support the agility required under these circumstances. This is especially the case for subsectors with substantial regulatory or compliance requirements.

6. COMPLETED RESEARCH STUDIES: 2012/13 – 2019/20

The table below highlights the research studies that were previously conducted and completed in collaboration with the universities between 2012/13 and 2019/20.

| University | FY 2012/13 (research project title) | FY 2013/14 (research project title) | FY 2014/15 (research project title) | FY 2015/16 (research project title) | FY 2016/17 (research project title) | FY 2017/18 (research project title) | FY 2018/19 (research project title) | FY 2019/20 (research project title) | |
|------------------------------------------------------------------------|--------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| University of Pretoria - Department of Tourism Management | Analysis of the supply of tourism products for the five key domestic market segments | A model to measure South Africa's tourism competitiveness (phase one) | A model to measure South Africa's tourism competitiveness (phase two) | Regional competitiveness: an emerging domestic market segment perspective | | Destination development through understanding tourists' expectations and memorable tourist experiences at major tourist attractions | Demand and supply market analysis for destination development | An assessment of the impact of mega trends in the tourism sector (phase one) | An assessment of the impact of mega trends in the tourism sector (phase two) |
| University of Pretoria - Department of Historical and Heritage studies | Understanding the concept of cross-border guiding in Southern Africa | Harmonisation of tourist guiding training regulations and standards in Southern Africa (phase one) | Harmonisation of tourist guiding training standards in Southern Africa (phase two) | Harmonised tourist guiding in Southern Africa | | The potential of the creative industry for destination development in South Africa- film tourism as a case study | A policy review of the tourist guiding sector in South Africa | Indigenous Story Tellers: Northern Cape as a case study; and Cross-Border themed tourism routes in the Southern Africa region – practice and potential | |
| University of Venda | Socio-economic impact of sporting events on rural communities: a case study | The socio-economic impact of religious tourism on rural communities in Limpopo: a case study (phase one) | The socio-economic impact of religious tourism on local communities in Limpopo: a case study (phase two) | Local economic development: the case of tourism events | | Interventions and incentives needed to improve the number of enterprises, including state-owned tourism attractions that embrace responsible tourism management practices | Sustainability of rural tourism products in South Africa: A case study of selected tourism products | An analysis of socio-economic opportunities in the tourism value chain (phase one) | An analysis of the public sector expenditure in the tourism value chain (phase two) |

| University | FY 2012/13 (research project title) | FY 2013/14 (research project title) | FY 2014/15 (research project title) | FY 2015/16 (research project title) | FY 2016/17 (research project title) | FY 2017/18 (research project title) | FY 2018/19 (research project title) | FY 2019/20 (research project title) | |
|-----------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|----------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| University of Johannesburg | Customer service satisfaction levels of domestic tourists at accommodation establishments in South Africa | Customer service satisfaction levels at tourist attractions in South Africa (phase one) | Customer service satisfaction levels at tourist attractions in South Africa (phase two) | Customer service satisfaction index for the accommodation subsector in South Africa | | Tourism value chain and opportunities for transformation in South Africa | | Leveraging state-owned tourism assets for black Small, Medium and Micro Enterprises development: a case of state-owned parks, lodges and attractions (phase one) | Leveraging state-owned tourism assets for black Small, Medium and Micro Enterprises development: a case of state-owned parks, lodges and attractions (phase two) |
| Cape Peninsula University of Technology | Governance and regulation of subvention funds study | Development of a framework to measure the impact of events (phase one) | Development of a framework to measure the impact of events (phase two) | Development of a framework to measure the impact of events (phase three) | | Development of a framework to assess the economic impact of coastal and marine tourism in South Africa (phase one) | | | |
| University of Zululand (from 2012/13 to 2013/14) University of KwaZulu-Natal (from 2015/16 to 2016/17) | Socio-economic impact of rural tourism routes on adjacent communities: a case study | The planning, development and management of tourism resource facilities and activities in municipalities in three provinces | | The impact of community-based tourism projects on local communities in KwaZulu-Natal | | The governance and coordination involved in coastal and marine tourism: challenges and opportunities | Development of a framework to assess the economic impact of coastal and marine tourism in South Africa (phase two) | Development of a framework to assess the economic impact of coastal and marine tourism in South Africa (phase three) | |



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