tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

FINAL REPORT

RE-EXAMINING PERSPECTIVES ON THE RECOVERY OF SOUTH AFRICA'S DOMESTIC TOURISM IN A COVID-19 ENVIRONMENT

DEFINITIONS

Domestic tourism: entails residents of a country travelling in the same country for tourism purposes (see definition of tourism below)

Recovery plan: documents and provides guidelines (including strategic directions and interventions) on how processes and activities have been negatively disrupted (unplanned).

Resilience: the ability/ capacity to adapt to changes as well as recover from or deal with challenges, difficulties and risks.

Sustainability: is a complex phenomenon of engaging in human activities that balances social, economic and environmental needs; without compromising the rights and needs of future generations, and ensuring that negative impacts are minimised.

Tourism: ‘the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited’ (UNWTO, cited in Statistics South Africa, 2019a: 4).

Tourism service providers: include all businesses and organisations, irrespective of size, that offer tourism experiences and services to prospective/ potential and active tourism consumers. Examples of tourism service providers include accommodation and restaurant establishments, tourism transportation services, travel agencies, tourism marketing agencies, tour operator services, tourism organisations/ associations, etc.

Transformation: refers to a change in the tourism sector that improves the ability to adapt and adjust to market demands and supply changes, as well as respond to sustainability obligations and imperatives, and technological/ digital advancements.

Abbreviations

CC	Carrying capacity
COVID-19	Coronavirus Disease 2019
CSR	Corporate Social Responsibility
DM	Demand management
DMO	Demand management organisation
DPSIR	Drivers, Pressures, State, Impact and Response
DUNC	Development of the United Nations Educational, Scientific and Cultural Organisation [UNESCO] Natural and Cultural assets
GDP	Gross Domestic Product
IATA	International Air Transport Association
ICT	Information and Communication Technologies
ILO	International Labour Office
OECD	Organisation for Economic Co-operation and Development
IRMSA	Institute of Risk Management South Africa
MGE	Mzansi Golden Economy
MICE	Meetings, Incentives, Conventions and Exhibition
NDT	National Department of Tourism
NPC	National Planning Commission
NTSS	National Tourism Sector Strategy
PMG	Parliamentary Monitoring Group
PoPIA	Protection of Personal Information Act
PPE	personal protective equipment
SADC	South African Development Community
SD	Smart destinations
SM	Seasonality management
SMMEs	small, medium and micro enterprises
SPSS	Statistical Package for the Social Sciences
STS	Social Tourism Scheme
TE	Tourism experience
TERS	Temporary-Employee Relief Scheme
TPB	Theory of Planned Behaviour
UKZN	University of KwaZulu-Natal
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UIF	Unemployment Insurance Fund
UP	University of Pretoria
UNWTO	United Nations World Tourism Organisation
VFR	visiting friends and relatives

TERS	Temporary-Employee Relief Scheme
WTTC	World Travel and Tourism Council

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1. Summary

The report provides the context of the study, stipulating the aim, objectives and research questions. In relation to the rationale and purpose of the research, the importance of domestic tourism globally and in South Africa specifically is highlighted. Furthermore, domestic tourism's role in the tourism sector's recovery post the devastating impacts of the COVID-19 pandemic is underscored. The theoretical/ conceptual framework that informs the research is the sustainable tourism development approach, embedded in an ecosystem-based operational model, that permits an examination of complex systems and phenomena (such as tourism) that have multi-dimensional aspects and impacts influenced by environmental, political, economic, and social factors. The importance of focusing on examining internal and external aspects, tourist and destination domains as well as demand and supply-side factors also frame the research. Issues pertaining to tourism demand, carrying capacity, sustainability and resiliency also emerge as being key to consider. In terms of the research methodology, a mixed methods approach was planned using both quantitative (tourism service provider and general public surveys) and qualitative key informant interviews (undertaken by the University of Pretoria - UP). At the time of submitting this report, the key informant interviews were not completed for inclusion in this study because of challenges UP faced. Online and face-to-face interviews were conducted. In total, 406 tourism service providers and 1 034 general public survey results are used for the primary data analysis. The literature review focused on key thematic areas: domestic tourism and the COVID-19 pandemic context and trends, domestic tourism responses to the pandemic, challenges for reigniting domestic tourism, innovative responses that are emerging and recommendations that are evident.

The primary data results echo the consensus in the literature that given the devastating impacts of the COVID-19 pandemic on the tourism sector and the continued travel disruptions and unpredictability (especially at the international level), domestic tourism is central to positioning the tourism sector on a pathway to recovery and, more importantly,

to make the sector more resilient to cope with future disruptions. South Africa has numerous well-established tourism destinations, products and resources available to rebuild a viable and strong domestic tourism sector; including internationally recognised coastal and marine, nature conservation sites and cultural tourism products. Additionally, while most South Africans generally have little, if any, disposable income; there is a sufficient proportion of the population who have discretionary income and many South African residents in this study exhibit a desire to participate in tourism activities. Thus, effective targeted marketing and providing incentives/ packages to promote domestic tourism will be critical to unlocking the potential to encourage travel and pent up demand. In terms of the latter, there are persons who have wanted and have the financial ability to travel but restrictions have prevented them from doing so. The desire to 'getaway' is also evident in the increase in staycations. There are differences in tourism service provider impacts linked to type of tourism activities involved in, number of years operational, number of employees, turnover and provincial location. In relation to travel preferences, key influential factors are population group, age, income level, employment status, educational level, household size and the location of place of residence.

The SWOT analysis in this study details the strengths and opportunities as well as the weaknesses and threats that need attention. This includes impacts across the tourism value chain with severe impacts on tourism businesses. The results indicate that tourism service providers involved in customer-dependent activities located in Gauteng and KwaZulu-Natal with lower turnovers, a smaller number of employees and operational for fewer years are more vulnerable to pandemic impacts and are likely to take longer to fully recover. Domestic tourism will be a key vehicle to increase demand and consumption, thereby reducing negative economic and employment impacts.

A more concerted effort and strategic orientation is needed to promote domestic travel in South Africa to address the impacts of the COVID-19 pandemic and change the current patterns of travel as well as address concerns/ fears of potential travellers. This needs to be done in a manner that simultaneously develops affordable and quality tourism products/ packages and services for local consumption while transitioning the tourism sector to be sustainable and resilient to deal with future disruptions. This cannot be achieved by the sector alone but needs to include government and the private sector, and requires transitioning the sector from the current industrial business operating model to an ecosystem-based operating model. The framework for this ecosystem operating model presented highlights four key steps (re-evaluate, reconfigure, respond and stimulate domestic tourism demand) that could help place the domestic tourism sector on a pathway to sustainability and increased resilience. This systematic approach to reigniting the domestic tourism section, called for in the framework, demands relevant and timely research with appropriate monitoring and evaluation to assess performance/ progress and inform learnings for adjustments and improvements in interventions/ support programmes. In this regard, a monitoring and evaluation framework is presented as well to be expanded on and finalised during Phase 2 of the project.

2. Introduction and background

The Coronavirus Disease 2019 (COVID-19) pandemic has and is having devastating impacts on tourist activities and businesses both locally and internationally, placing many parts of the sector at risk of collapse due to travel bans across the world (Dube et al., 2020; Gössling et al., 2020; Nan, 2020; Strielkowski, 2020). Given that reigniting the tourism sector will form a key part of South Africa's COVID-19 recovery plan, this study has been conceived at the ideal time. In South Africa, the tourism industry has been making an important contribution to the Gross Domestic Product (GDP). Tourism is regarded as a critically important sector with substantial potential to contribute to the GDP, generate direct and indirect job creation and income opportunities, increase foreign exchange earnings, and enable economic diversification and resilience (Mitchell, 2019; Mutimucuio and Meyer, 2011).

Domestic tourism plays a crucial role in the economy and has many benefits such as job creation and boosting of the GDP. The impact of COVID-19 has had severe impacts on increases in tourism trends. While all sectors have been affected by COVID-19, the tourism industry has been heavily impacted and suffered serious losses (Gössling et al., 2020). In any case, the tourism industry in South Africa is one of the industries most affected by the pandemic due to the magnitude and influence that the tourism industry has on the economy and the incidence of COVID-19 in the country where the lockdown is now exceeding a year. Ritchie and Jiang (2019) argue that when countries are faced with crises situations such as COVID-19, tourism industries are forced to change their operating strategies. Such changes generate high levels of uncertainty and usually require quick responses in facing negative impacts.

Whilst interventions made by both the public and private sector during the pandemic have helped the South African domestic tourism sector recover to some extent, the pandemic continues to reveal the weaknesses of the sector's operating model, its lack of resilience and unsustainable design. On this point it is instructive for us to consider the distinction between an operating and business model: a business model describes how an organisation or in this case business sector creates, delivers and captures value and sustains itself in the process, while an operating model looks specifically at the delivery element of the business model (Zott et al., 2011). The term operating model has traditionally been used to describe relationships among businesses in a corporation's portfolio and the process governing investments among them (Lynch et al., 2009) but it can be applied to understanding a sector as a whole. In fact, calls for the use of the operating model framework for rendering a sector such as tourism more sustainable by shifting from the traditional industrial (production and consumption) to alternative, more sustainable, models started to emerge close to a decade ago (Pollock, 2012; Selen and Ogulin, 2015). This type of model shift may be necessary to reignite South African domestic tourism by moving it from a position of recovery to one of resilience, placing it on a pathway to sustainability.

3. Rationale of the study

Given the tourism sector's ability to be resilient and recover from shocks and recessions (Cheng and Zhang, 2020; Roy et al., 2016; Strielkowski, 2020), tourism trends will resume on an upward trajectory once the pandemic is brought under control. The United Nations World Tourism Organisation (UNWTO, 2016) states that the tourism sector is one of a few that has consistently shown growth and expansion as well as flexibility despite past economic shocks and challenges, which bodes well for the tourism sector once the COVID-19 pandemic is brought under control. According to Dogru and Bulut (2018) and Kabote et al. (2017), domestic tourism markets, in particular, is viewed as being vital to offset drops in international tourism arrivals during crises and off-peak periods. Thus, reigniting domestic tourism is central to South Africa's tourism sector's COVID-19 pandemic recovery strategy. This study examines key demand and supply-side aspects to assess the effects of the COVID-19 pandemic on the domestic tourism sector, current and potential strategies to respond to the crises, and how to build resilience in the future. Thus, this study also provides an opportunity to critically examine challenges experienced in relation to domestic tourism prior to the COVID-19 pandemic. As UNWTO (2020d) indicates, the current crisis offers an opportunity for countries to re-evaluate their domestic tourism and implement policies that encourage domestic travel. An important aspect to consider is that the tourism sector in South Africa has substantial unlocked potential in many areas where growth is constrained as a result of several persistent challenges, including continued and widespread poverty, infrastructural backlogs and inadequacies, spatial inequalities and the slow pace of transformation.

Reigniting domestic tourism also requires radical changes in the manner in which future disruptions are anticipated and how the sector can respond and recover. The COVID-19 pandemic disruptions have exposed the vulnerabilities of the tourism sector which was anticipated in the National Development Plan, which stated that "the outbreak of a pandemic that could disrupt travel, tourism, trade, financial markets, and domestic and regional order" (National Planning Commission - NPC, 2013: 79). However, while anticipated, preparations and plans were not fully developed and developing a framework to reignite domestic tourism will contribute substantially to developing a disaster preparedness strategy for the tourism sector. Roelf (2020) states that restarting local travel is central to rebuilding the tourism sector in South Africa which resonates with the assertions presented earlier, but cautions that the pandemic has had severe economic impacts on the populace who are cash-strapped. An important area that this study also focuses on is to disaggregate the impacts of COVID-19 on domestic tourism by examining which sub-sectors were in demand during the pandemic, as the economy re-opened and, most importantly, what are the long-term impacts of the COVID-19 pandemic on how travel preferences and patterns are likely to change, and what are the expectations at destinations and in relation to services provided. Thus, from a research perspective, the COVID-19 pandemic disruptions provide an opportunity to examine impacts, relook at business practices and tourism products, and centralise domestic tourism in future strategies and plans. Additionally, given that the pandemic has had global impacts, lessons can be drawn from other countries to examine how other countries, especially those similar to South Africa in relation to socio-economic levels and tourism offerings, have been and are responding to the pandemic, and longer-term strategies being used to support and reignite domestic tourism.

4. Problem statement

The COVID-19 pandemic has had devastating impacts on the tourism sector generally and on domestic tourism specifically. The sector has exhibited clear difficulties in sustaining itself by diversifying its offerings and responding to changes in tourism patterns brought about by the pandemic. This is largely due to the mainstream of domestic tourism in the country being based on an industrial model of production and consumption but with a reduced demand during the pandemic, a trend that is likely to be exacerbated when international tourism resume, it has produced diminishing returns for large parts of the sector. Domestic tourism, however, has substantial potential to contribute economically, if it were to shift to a more sustainable and resilient model, and is the first point of call in an overall tourism recovery strategy since international tourism recovery is likely to take longer. It is, therefore, imperative that domestic travel intentions, behaviour during and post-pandemic are well understood to develop a strategy for reigniting domestic tourism. Additionally, there is an urgent need to identify approaches to enhance the ability of tourism service providers to respond to changes in demands and travel patterns. This requires both supply and demand-side aspects to be sufficiently considered. Thus, it is necessary to undertake research to examine the public's travel patterns, perceptions and future intentions (willingness to travel), critically assess current strategies and interventions to promote domestic tourism, and draw on international responses to identify best practices that inform the development of an overarching domestic tourism recovery framework.

5. Purpose of the study

The purpose of the study, as articulated in the Department of Tourism's Call for proposals, is to examine how domestic tourism in South Africa can be reignited as part of the sector's recovery plan during and post COVID-19. This particular study re-examines perspectives of the public (in relation to their travel behaviours and future patterns) and tourism service providers on domestic tourism's recovery in South Africa in a COVID-19 environment. This component adopts a quantitative survey-based methodological approach. Additionally, key stakeholder perspectives were intended to be examined as part of a mixed methods approach to integrate a qualitative component of the research. It was agreed that the University of Pretoria (UP) would focus on this component of the research and inputs for the key informant interview schedule were submitted. However, at the time of compiling this report key informant interviews were not undertaken due to challenges experienced by the UP team. Importantly, the survey data together with the literature reviewed is used to develop a framework/ model to guide how domestic tourism in South Africa can be reignited as part of the sector's recovery plan during and post COVID-19. Recommendations are also made on how this framework/ model can be implemented as well as monitored and evaluated.

6. Research questions

The research questions for the study are:

- How have other countries reignited domestic tourism? What are the best practices mechanisms that are relevant to the South African context? What are the challenges experienced, and how have these been addressed?
- What are key factors that are required to reignite domestic tourism in South Africa as part of the sector's recovery plan during and post COVID-19 in relation to key areas, such as:
    - Current domestic tourism travel patterns and future intentions/ willingness to travel?
    - Readiness of tourism service providers to support domestic tourism?
    - Government support for reigniting domestic tourism?
    - Effectiveness of marketing and communication/ awareness strategies?
- What are the challenges and opportunities for leveraging domestic tourism as part of the sector's recovery plan during and post COVID -19? How are the challenges currently being addressed, if at all, and how are opportunities being leveraged?
- What practical, innovative interventions are required to reignite domestic tourism as part of the sector's recovery plan during and post COVID-19, which includes assessing the feasibility of implementing such interventions?
- What are the key elements in a framework/ model to guide how domestic tourism in South Africa can be reignited as part of the sector's recovery plan during and post COVID-19? How can the framework/ model be implemented, and monitored and evaluated?

7. Objectives of the study

The main objectives of the study are to:

- Determine best practice mechanisms applied in other countries to reignite domestic tourism.
- Identify key factors identified by stakeholders (including the general public as the domestic tourism market and tourism service providers) that are required to reignite domestic tourism in South Africa as part of the sector's recovery plan during and post COVID-19.
- Determine challenges and opportunities for leveraging domestic tourism as part of the sector's recovery plan during and post COVID-19, especially in relation to current and future travel behaviour as well as the readiness of tourism service providers.
- To identify practical, innovative interventions (identified by stakeholders and evident from best practices) required to reignite domestic tourism as part of the sector's recovery plan during and post COVID-19.
- Develop a national framework to guide how domestic tourism in South Africa can be reignited as part of the sector's recovery plan during and post COVID-19.
- As part of the national framework, to develop a monitoring and evaluation indicator toolkit that can be used by the Department of Tourism to assess the implementation of the proposed framework/ model, which can also be used to revise the framework/ model as needed.

Selected proposed interventions and the national framework, especially the monitoring and evaluation indicator toolkit, can be operationalised and piloted if the project is extended for a second year.

8. Theoretical Background

According to Svinicki (2010: 5), conceptual frameworks "serve as the basis for understanding the causal or correlational patterns of interconnections across events, ideas, observations, concepts, knowledge, interpretations and other components of experience". For complex systems, such as tourism, wherein concepts are interrelated and often embedded, the use of single conceptual/ theoretical approaches may not permit robust and holistic understandings. Since tourism remains a multi-dimensional phenomenon influenced by environmental, political, economic, and social factors, this research being undertaken is based on multi-concept theoretical frameworks. The conceptual framework for tourism proposed by Wall and Mathieson (2006) underscore the importance of evaluating the tourist and destination domains as the main drivers of the process (Figure 1). This research aims to unpack each of these domains to highlight the key areas of focus to reignite the South African domestic tourism sector during and post COVID-19.

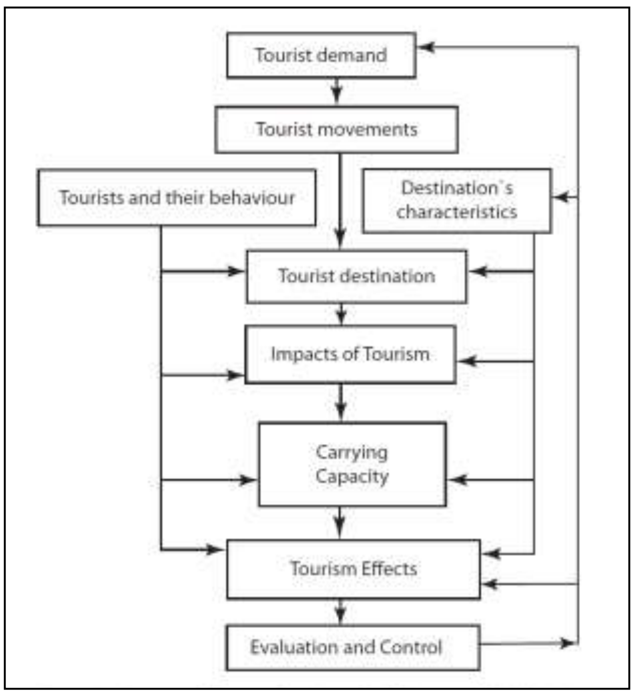


Figure 1: Conceptual framework for tourism (Wall and Mathieson, 2006)

It is widely established that tourists' decision to travel is determined by a host of factors that ultimately influence their behaviour. Croucamp and Hind (2014) show that the decision to visit a particular destination starts with personal features and preferences. The extant tourism literature indicates that travel motivations underlie travellers' decision-making processes and are key triggers of purchasing behaviours (Donaldson and Ferreira, 2009; Floyd et al., 2004). In this regard, the Theory of Planned Behaviour (TPB - previously referred to as the Theory of Reasoned Action) (Ajzen, 2011) will be used to examine tourist behaviours. The theory describes behaviour as an outcome based on several factors. For example, Allen and Yap (2009) show that income and tourism prices influenced domestic tourism demand in Australia. Scholtz et al.'s (2015: 24) approach to identify internal (visitors) and external (destination-specific attributes) influential factors that influence travel choices and length of stay are useful:

Internal

- Socio-demographics (age, gender, occupation, level of income, family composition, etc.)
- Behaviour (preferred activities, accommodation, mode of transport, group size, etc.)
- Motives for visiting

External

- Destination image (including environmental quality and scenery, perceptions of service levels, and safety and security)
- Location and/ or distance to travel
- Services and amenities on offer
- Climate and/ or season

Undoubtedly, COVID-19 regulations, social distancing, and risk of exposure have significantly influenced and influences tourist behaviour. Attempts to reignite the domestic tourism markets must be cognisant of these aspects. Travellers' perceptions of risk are shaped by factors such as first-hand experiences; impressions, and opinions of the host environment; interaction with colleagues, friends and family; perceptions about the governments' ability to provide safety; and the extent to which the tourists feel helpless against risks (Institute of Risk Management South Africa [IRMSA] Risk Report, 2015). The examination of risk in this context is crucially important since the decision to travel will be influenced by perceptions of safety, health and hygiene, especially in relation to

COVID-19 regulations and preparedness. Examining how tourists conceive these tourism products and destinations may be vital to planning and development in the domestic sector going forward.

Consequently, the demand and supply factors that characterise tourism destinations are equally important. In this regard, consumer behaviour theory will be used in conjunction with tourism demand and supply models to characterise tourism destinations and products. Given the current development challenges plaguing South Africa, the theory of sustainable development will be the basis for the proposed conceptual model to enhance aspects such as the equitable distribution of benefits that can be leveraged from domestic tourism markets and alignment with environmental standards and protection efforts.

Adillón (2019) in proposing the diamond model as a theoretical framework for the sustainable development of tourism, outlines the evolution of a tourism area (Figure 2). Adillón (2019) also indicates that endogenous and exogenous factors influence the growth trajectory of a tourist area. It is important to note that a disruption of the scope and scale of the COVID-19 pandemic has not been experienced previously. Different tourist areas as well as specific tourism products/ services, types and enterprises have experienced immediate (and pronounced) decline, with high levels of unpredictability as regions and the world responds to waves in infections and variants being detected. To change the trajectory of decline, external interventions are often required. It is also important to focus on the relationships between supply and demand which, Adillón (2019) argues are linked to people's perceptions, expectations, attitudes and values. It is also important to identify and respond accordingly to tourism businesses and destinations that are in a state of inertia versus those that have demonstrated dynamism in terms of their responsiveness.

Lessons emanating from Adillón's (2019) assessment of tourism impacts after extraordinary events (focusing on the September 11 terrorism attacks) are pertinent to the COVID-19 pandemic. Adillón (2019) cautions that some destinations may experience over tourism and exceeding carrying capacity can undermine the quality and sustainability of the tourism destination as well as result in tourism aversion where local residents undermine tourism development. Congestion problems in these areas can also result in increased exposure to COVID-19. Concerns about over tourism are also raised by Noorashid and Chin (2021) who state that the demands of consumers in the thriving industry of domestic tourism may result in over domestic tourism which could involve both the overflowing of domestic tourists and overpromotion of products and services. They further argue that this could lead to an uncontrollable market due to the perpetuation of domestic tourism campaigns and COVID-19 travel restrictions. Adillón (2019) further identifies that the main types of tourism destinations likely to be affected by tourism congestion are natural tourism destinations, cultural and heritage-orientated destinations, urban tourism and consolidated coastal tourism destinations. These are key types of tourism in South Africa and, therefore, from a sustainable tourism perspective, it is critical that the effects of over-tourism in these destinations are considered.

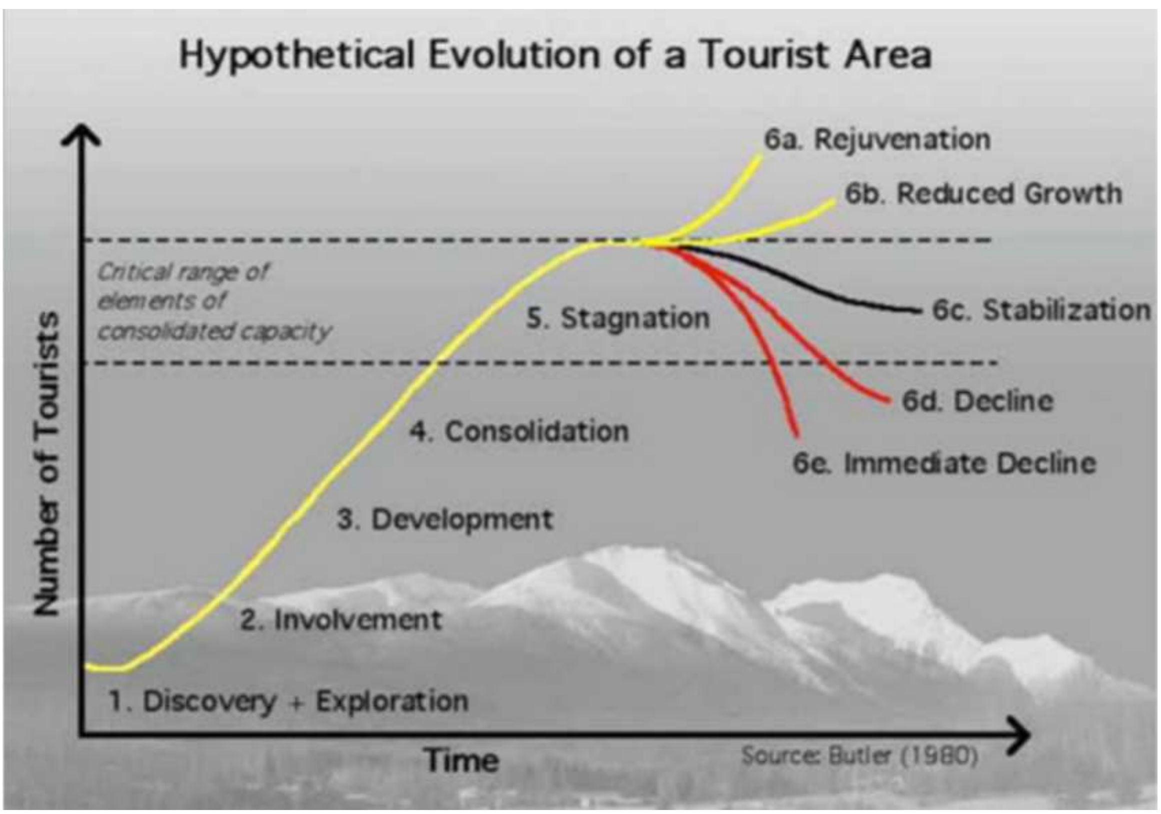


Figure 2: Evolution of a tourism area (Adillón, 2019: 12)

In the diamond model proposed by Adillón (2019) in Figure 3, demand management (DM), destination management organisation (DMO) and local communities are higher level aspects that need to be considered. The key influential factors that inform sustainable tourism development are smart destinations (SD), seasonality management (SM), tourist experience (TE) and carrying capacity (CC). The carrying capacity assessment proposed by Adillón (2019) incorporates the drivers, pressures, state, impact and response (DPSIR) framework, which are critical aspects to consider in relation to sustainable tourism.

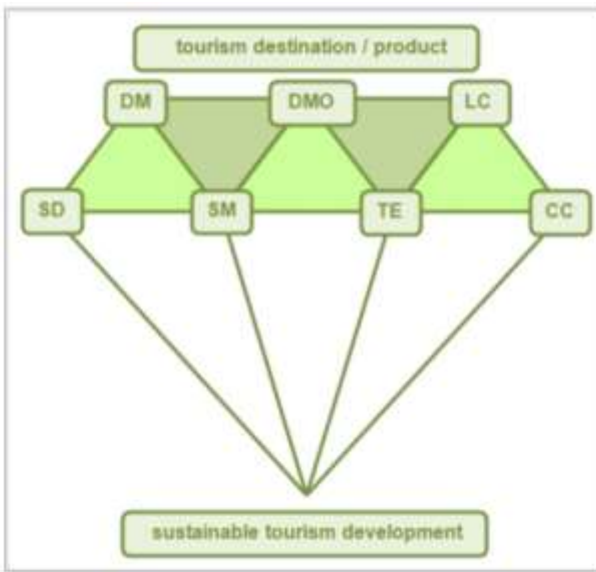


Figure 3: Diamond: a sustainable tourism model (Adillón, 2019: 16)

9. Research methodology

The inception meeting with the Department of Tourism to discuss the scope of the assignment in more detail and to finalise the methodological approach was useful to delineate the focus of the University of KwaZulu-Natal (UKZN) and UP's projects, and discuss how the two projects could complement each other. In terms of the methodological approach, UKZN focused on the quantitative component (specifically the public and tourism service provider surveys). The public survey targeted adult citizens/ persons who reside in South Africa. This is the potential domestic tourism market. The draft surveys were shared with the Department of Tourism and UP for their inputs and UKZN provided inputs in relation to the key informant schedule developed by UP. As indicated earlier, the key informant interviews were not completed and therefore not incorporated in this study.

9.1. Data collection

The quantitative method included online surveys among the general public (the domestic tourism market) to examine past, current and future travel patterns, intentions and perceptions. Thus, the public survey aimed to better understand demand-side perspectives. Online/ electronic (including telephonic) and face-to-face interviews were conducted with targeted tourism service providers (including the accommodation sectors, tour operations, tourism establishments, etc.) to examine their readiness and willingness to reignite domestic tourism, and their perceptions of challenges and opportunities. Where possible, existing networks were being used to undertake face-to-face surveys with tourism service providers to increase the response rate and ensure that different types of service providers in different localities were sufficiently included. Additionally, face-to-face surveys were prioritised when it became evident that the online responses were extremely low. Specifically, the current team complement (including postgraduate students) focused on completing face-to-face interviews in Cape Town, Durban, St Lucia, Kimberley and Johannesburg. The public and service provider surveys were undertaken concurrently. A more detailed discussion of each of the approaches used follows in relation to the phased approach adopted.

Phase 1: Desktop study

The desktop study included reviewing relevant literature (presented in this interim report), drawing on national and international perspectives to identify best practices and current trends in relation to reigniting domestic tourism during and post the COVID-19 pandemic. Thus, Phase 1 entailed a systematic literature and policy review. Different best practices were analysed and assessed in relation to the South African context. Key factors/ indicators were considered to develop the framework/ model. The information for the desktop study was sourced primarily via the internet focusing on policy and position paper documents, journal articles, books, conference papers, newspaper articles, magazines and studies conducted by tourism organisations and other relevant bodies. This review was based on literature searches using the following databases for relevant publications from 2010 onwards: Pub Med, Web of Science, ScienceDirect, and Google Scholar. The search was based on a set of keywords and symbols that were used to avoid duplication. More general internet searches were also used to source relevant policies, frameworks, guidelines, case studies, etc. Popular articles and publications as well as high level reports produced by relevant and appropriate stakeholders were also considered as part of this review. The desktop study informed strengthening the theoretical framework presented earlier and literature review presented next to identify best practices and permit comparisons to be made during the data analysis stage. The desktop study also assisted to develop the data collection tools (quantitative surveys), and contributed to the development of the framework/ model.

Phase 2: Quantitative online surveys

Online surveys were administered to solicit views and perceptions from the broader public (as current and potential domestic tourists) and tourism service providers (including businesses) via the use of electronic approaches as well as face-to-face surveys, where possible. Online surveys are a cost-effective and increasingly popular way of undertaking survey-based research, especially in the context of COVID-19 restrictions and social distancing protocols. In terms of the tourism service provider survey, key aspects that were covered included:

- Profile of the tourism service provider
- Perceptions of the broader impacts of the COVID-19 pandemic on domestic tourism in South Africa and on their specific business/ organisation
- Impacts and responses/ strategies adopted to address the COVID-19 disruptions in the tourism sector (underscoring any that focused on promoting domestic tourism)
- Perceptions of the challenges and opportunities that exist at different levels to reignite domestic tourism
- Perceptions of what should be done to reignite domestic tourism, how this should be done and who should be responsible (including the service provider).

In terms of sampling for the tourism service providers, various databases (including that of the Department of Tourism and tourism organisations) were used to compile a list of tourism service providers. Additionally, research assistants undertook internet searches to complement information derived from existing sources. The lists were used to approach the service providers to participate in the study. Organisations, including the Department of Tourism, were approached to also host the survey invitation links to increase overall participation in the survey. Additionally, a form of snowball sampling approach was used whereby persons who receive the invite were asked to forward the invitation to other tourism service providers they know. Furthermore, in selected locations as indicated earlier, face-to-face surveys were conducted to complement the online survey exercise. Attention was paid to ensure that different tourism sub-sectors were represented and that there was spatial representation. The target sample size was 400 to enable s trend analyses to be undertaken. In total, 406 tourism service provider surveys were completed.

In terms of the public survey, key aspects that are covered include:

- Demographic profile of the respondent in relation to age, gender, population group, educational level, occupation, place of residence, etc.
- Past, current and future (post-COVID-19) domestic tourism travel patterns
- Willingness to travel domestically and tourism consumption preferences (including reasons thereof such as location, cost and safety considerations)
- Challenges experienced to engage in domestic tourism (include risk perception concerns)
- Perceptions of the broader impacts of the COVID-19 pandemic on domestic tourism in South Africa
- Knowledge/ awareness and perceptions of responses/ strategies adopted to address COVID-19 disruptions on domestic tourism
- Perceptions of what should be done to reignite domestic tourism, and especially to create conditions for the respondent to travel.

For the public online survey, the target population was the general public. Invitations to participate various networks (including institutions). Similar to the tourism service provider survey, a form of snowball sampling approach was used whereby persons who received the invite were asked to forward the invitation to others in their network. Furthermore, similarly to the tourism service provider survey, in selected locations face-to-face surveys were conducted to increase the response rate. The target sample size was 1 000 which enables trend analyses to be undertaken, based on similar studies being conducted nationally to assess demand and perception in other sectors. In total, 1 034 public travel behaviour surveys were completed.

The platform to host the online surveys was Google Forms. Since the surveys were mainly being self-administered (respondents to complete), the surveys included mainly closed-ended and Lickert scale questions for ease of completion and analysis.

For both the tourism service provider and public surveys, it is important to note that the use of online and snowball sampling as well as face-to-face interviews at purposively selected cities and locations to increase the response rate implies that a non-probability sampling approach was adopted, although targeted sample sizes were met. The inclusion of different locations and types of tourism service providers as well as individuals from the general public were intended to increase representation in terms of ideas, opinions, experiences and perceptions to inform the trends analyses undertaken.

Phase 3: Development of framework/ model

The information emerging from the desktop study together with the data emanating from the primary data collection undertaken is used to inform the development of a framework/ model to guide how domestic tourism in South Africa can be reignited as part of the sector's recovery plan during and post COVID-19. As indicated earlier, this includes the framework for the reignition of domestic tourism as well as a monitoring and evaluation indicator toolkit that, when developed fully as a Phase 2 part of the project, can be used by the Department of Tourism to assess the implementation of the proposed framework/ model, which can also be used to revise the framework/ model as needed.

9.2. Data analysis

The quantitative data (from the tourism service provider and public surveys) was subjected to a thematic analysis, aligned to the research questions and objectives, by means of descriptive and inferential statistics using the Statistical Package for the Social Sciences (SPSS). Findings are presented in Tables and are critically analysed, integrating the literature reviewed and extracting information pertinent to the development of the framework/ model. Furthermore, cross-tabulations and chi-square tests, comparing the means of the variables (with P values less than 0.05 indicating a statistically significant association), were used to establish whether there were relationships between selected variables. In terms of the presentation of the results, because of the rounding off of percentages to one decimal point, in some cases, the total percentage figures do not add up to 100%.

9.3. Ethical considerations

Ethical compliance was being adhered to. Online surveys include a covering letter that indicates the purpose of the study, underscoring that this is a Department of Tourism commissioned study, providing contact details of the Project Leader and the Department of Tourism, and assuring respondents that their participation in the study was voluntary and the confidentiality and anonymity of respondents will be respected. They could also withdraw from the study at any time. For the online surveys, a question that asks the person responding that they agree to participate in the study was included. The online survey was configured in a way that if this question was not answered in the affirmative, the survey could not be accessed for completion. Thus, online informed consent was adhered to. All information is anonymous (no personal details were collected) and confidential. An ethical application was submitted to the Human and Social Sciences Ethics Committee at UKZN (which is nationally accredited) and full ethical approval has been granted.

9.4. Challenges

The target sample size for the tourism service provider and public surveys were initially 600 and 2 000, respectively, and were revised to 400 and 1 000, respectively, after consultation with the Department of Tourism. There is clearly only survey fatigue being experienced and a decision was taken to conduct more face-to-face interviews. Concern was also raised that if the team continued to rely on online surveys based on personal and professional networks (especially in relation to academic biases), the sample would not reflect South African society. During the consultation meeting on the 10th December 2021, it was agreed that the online general public survey would be complemented to face-to-face interviews during the Lockdown Level 1 which permitted research of this nature to be conducted and as per the approved methodological approach outlined in the ethical application. Fieldworkers who had experience with these types of interviews were identified in purposively selected locations (Cape Town, Durban and Johannesburg). Interviews were conducted at selected public venues such as malls and recreational spaces. Fieldworkers were trained to limit bias and ensure representation when choosing who to interview. The lack of existing tourism service provider databases also posed challenges, which was addressed by increasing the number of face-to-face interviews at selected cities as detailed earlier.

10. Literature review

The COVID-19 pandemic has and is having devastating impacts on tourist activities and businesses both locally and internationally, placing many parts of the sector at risk of collapse due to travel bans across the world (Dube et al., 2020; Gössling et al., 2020; Strielkowski, 2020). Given that reigniting the tourism sector will form a key part of countries' COVID-19 recovery plan, this study is conceived at the ideal time. The development of a framework to form the basis of a recovery plan for the domestic tourism sector is the main outcome of this research. The focus is also on building resilience in the longer term to respond to future disruptions. The literature review examined key concepts and thematic areas.

10.1. Domestic tourism and the COVID-19 pandemic context and trends

The COVID-19 pandemic had and continues to have devastating effects which have been characterised by alarmingly high levels of economic uncertainty and unemployment (International Labour Organisation [ILO], 2020) and predictions that the world's chances of attaining the United Nations Sustainable Development Goals by 2030 are unlikely (Sumner et al., 2020). The predicted effects on Africa are particularly worrying (Ataguba, 2020), given its disproportionate burden of poverty and disease, high levels of unemployment, poorly developed infrastructure, lack and, in some cases, absence of safety nets, and under-resourced healthcare systems (Gouda et al., 2019; O'Hare, 2015; McIntyre et al., 2018). South Africa represents a particular concern in that it had the highest number of confirmed cases in Africa as at 25 July 2020 and was struck by the pandemic at a point when its economy was already struggling (Alenda-Demoutiez and Mügge, 2020). Concerns of high rates of infections and the country entering subsequent waves remain.

The tourism industry is among the largest industries creating direct and indirect employment, mostly for the local people who live in the communities around a tourism destination, generating business opportunities for other industries. In South Africa, the tourism industry has been making an important contribution to the GDP. Specifically, South African Tourism (2019a) states that the World Travel and Tourism Council (WTTC) estimated that, in 2018, the economic impact of tourism in South Africa (measured through tourism's total contribution to GDP) was R425 billion (8.6% of the total economy). WTTC (2018) estimated that in 2017 domestic tourism accounted for 73% of travel and tourism spending, thus being the key driver of the tourism sector. Furthermore, Statistics South Africa (2019b) indicates that South Africa enjoys a positive tourism trade balance compared to the rest of the world, with non-resident visitors spending more money than South Africans who travel abroad. This is also indicative of the economic value of tourism in South Africa, with the country earning more foreign currency from tourism-related activities than it spends in other countries (Statistics South Africa, 2019b). Tourism is regarded as a critically important sector with substantial potential to contribute to the GDP, generate direct and indirect job creation and income opportunities, increase foreign exchange earnings, and enable economic diversification and resilience (Mitchell, 2019; Mutimucuio and Meyer, 2011). Globally, the World Economic Forum (WEF, 2020) states that the tourism industry accounts for 10% of the GDP. UNWTO (2020a) asserts that 1.5 billion people travelled globally in 2019, and it is expected that by 2030 1.8 billion people would be travelling. Businesswire (2021) indicates that globally the domestic tourism market size was valued at $1,226.1 billion in 2020 and is estimated to reach $6,736.1

billion by 2030, which equates to a Compound Annual Growth Rate of 13.4 from 2021 to 2030. This projection, which considers the impacts of the COVID-19 pandemic, illustrates that there are high levels of confidence that domestic tourism will recover from the downturns and disruptions experienced. The sector, therefore, has major impacts on employment, livelihoods and economic growth.

Domestic tourism plays a crucial role in the economy and has many benefits such as job creation and boosting of the GDP. Domestic tourists contributed R29.5 billion in the year 2018/2019 globally, a growth of 35.7% over the R21.7 billion in 2017/18 (South African Tourism, 2019a). Furthermore, a Domestic Tourism Survey undertaken by Statistics South Africa (2019b), focusing on Quarter 1 and Quarter 2 trends in 2019, reveal that provincial travel trends differed from Quarter to Quarter, specifically in Quarter 1 in 2019 most domestic overnight trips were to Limpopo, Eastern Cape and Gauteng in Quarter 1 while in Quarter 2 in 2019 most day trips were to Limpopo, KwaZulu-Natal and the Western Cape. Furthermore, Statistics South Africa (2019b) found that overnight expenditure increased from R16.2 billion in Quarter 1 to R17.6 billion in Quarter 2, with most domestic tourism visitor spend being on transport (with cars and taxis being the most frequently used modes of transport), shopping, accommodation, and food and beverages. The number of overnight trips increased from 14.1 million in Quarter 1 to 17 million in Quarter 2. The main reasons for overnight domestic trips were visiting friends and relatives followed by funeral attendance as well as leisure and religious purposes (Statistics South Africa, 2019b). The impact of COVID-19 has had severe impacts on increases in tourism trends prior to the pandemic. While all sectors have been affected by COVID-19, the tourism industry has been heavily impacted and suffered serious losses (Gössling et al., 2020). In any case, the tourism industry in South Africa is one of the industries most affected by the pandemic due to the magnitude and influence that the tourism industry has on the economy and the incidence of COVID-19 in the country where the lockdown is now exceeding a year. Ritchie and Jiang (2019) argue that when countries are faced with crises situations such as COVID-19, tourism industries are forced to change their operating strategies. Such changes generate high levels of uncertainty and usually require quick responses in facing negative impacts. In this broader context, as detailed in the rationale for the study, reigniting domestic tourism is critically important to move the sector to recover from the pandemic impacts as well as place it on a pathway to sustainability and resilience.

It cannot be ignored that the COVID-19 pandemic has resulted in severe disruptions globally, as shown by Hoque et al. (2020), Nhamo et al. (2020), Rogerson and Rogerson (2020), the UNWTO (2020a, 2020b, 2020c) and the WEF (2020). Given the tourism sector's ability to be resilient and recover from shocks and recessions (Cheng and Zhang, 2020; Roy et al., 2016; Strielkowski, 2020), tourism trends will resume on an upward trajectory once the pandemic is brought under control. In South Africa, the National Department of Tourism (NDT, 2020 – now Department of Tourism) states that prior to COVID-19, in February 2020, the performance and optimism around South Africa's tourism economy were generally positive, with 40% of responding firms claiming that they were growing and 32% indicating a performance at a constant level. Given that the WTTC (cited in WEF, 2020) speculates that about 50 million jobs, globally, associated with the travel and tourism sector are at risk (decrease of 12-14%), the unprecedented impacts of the COVID-19 pandemic cannot be overlooked and need to be integrated into tourism research and recovery efforts.

The UNWTO (2016) states, however, that the tourism sector is one of a few that has consistently shown growth and expansion as well as flexibility despite past economic shocks and challenges, which bodes well for the tourism sector once the COVID-19 pandemic is brought under control. According to Dogru and Bulut (2018) and Kabote et al. (2017), domestic tourism markets, in particular, are viewed as being vital to offset drops in international tourism arrivals during crises and off-peak periods. Thus, reigniting domestic tourism is central to South Africa's tourism sector's COVID-19 pandemic recovery strategy. This study will examine key demand and supply-side aspects to assess the effects of the COVID-19 pandemic on the domestic tourism sector, current and potential strategies to respond to the crises, and how to build resilience in the future.

Thus, this study also provides an opportunity to critically examine challenges experienced in relation to domestic tourism prior to the COVID-19 pandemic. As UNWTO (2020a) indicates, the current crisis offers an opportunity for countries to re-evaluate their domestic tourism and implement policies that encourage domestic travel.

An important aspect to consider is that the tourism sector in South Africa has substantial unlocked potential in many areas where growth is constrained as a result of several persistent challenges, including continued and widespread poverty, infrastructural backlogs and inadequacies, spatial inequalities and the slow pace of transformation. For example, the National Tourism Sector Strategy (NTSS) (NDT, 2017) notes that heritage and cultural tourism products are the fastest emerging competitive niche or product within international and, most importantly, domestic markets. The Mzansi Golden Economy (MGE) highlights explicitly the economic (and related job creation) potential of the arts, culture and heritage sector; with cultural and heritage tourism (including events and festivals) being a key component. Similarly, nature-based tourism or ecotourism products and activities are vast, with considerable potential in the domestic tourism market. Reigniting domestic tourism requires an innovative rethink of how to better unlock both the demand-side and supply-side constraints within the South African economy, a focus of this study.

Reigniting domestic tourism also requires radical changes in the manner in which future disruptions are anticipated and how the sector can respond and recover. The COVID-19 pandemic disruptions have exposed the vulnerabilities of the tourism sector which was anticipated in the NDP, which stated that "the outbreak of a pandemic that could disrupt travel, tourism, trade, financial markets, and domestic and regional order" (NPC, 2013: 79). However, while anticipated, preparations and plans were not fully developed and developing a framework to reignite domestic tourism will contribute substantially to developing a disaster preparedness strategy for the tourism sector. Roelf (2020) states that restarting local travel is central to rebuilding the tourism sector in South Africa which resonates with the assertions presented earlier, but cautions that the pandemic has had severe economic impacts on the populace who are cash-strapped. An important area that this study also focuses on is to disaggregate the impacts of COVID-19 on domestic tourism by examining which sub-sectors were in demand during the pandemic, as the economy re-opened and, most importantly, what are the long-term impacts of the COVID-19 pandemic on how travel preferences and patterns are likely to change, and what are the expectations at destinations and in relation to services provided. For example, as elaborated on in the literature review, staycations are an important emerging phenomenon in domestic travel. Thus, from a research perspective, the COVID-19 pandemic disruptions provide an opportunity to examine impacts, relook at business practices and tourism products, and centralise domestic tourism in future strategies and plans.

10.2. Domestic tourism responses to the COVID-19 pandemic

Ndlovu et al. (2011) state that domestic tourism accounts for approximately 60% of the total tourist revenue that is generated in developed countries. Domestic tourism is the leading form of tourism in many countries. Since domestic tourism is largely determined by local cultural and natural resources, many underdeveloped regions depend on this form of tourism for income generation, poverty alleviation as well as overall economic growth and development (Li et al., 2016; Makhaola and Proches, 2017; Ndlovu et al., 2011; Saayman et al., 2001). Cornelissen (2005) and Makhaola and Proches (2017) further stress that domestic tourism is essential since, unlike international tourism which is controlled by peak and off-peak seasons, it occurs throughout the year. Similar sentiments are expressed by WTTC (2018) who asserts that domestic travel helps address seasonality within regions, while also dispersing tourists to less visit rural areas which tend to be overlooked by international travellers. Notably, the domestic tourism industry, in it being consistently running throughout the year, sustains the operation of related businesses (Makhaola and Proches, 2017) which in turn leads to a growth in employment and, subsequently, improved standards of living in the host area as well as the development of attractions (Ndlovu et al., 2011). Specifically, Pillay (2017) states that restaurants, accommodation, attractions and recreational activities, as well as transport services and travel agencies, play a crucial role in the domestic tourism sector.

Llorca-Rodríguez et al. (2020: 198) state that the current domestic tourism research focuses primarily on economic aspects, which "causes of the scarcity of information on domestic tourism flows". Page and Connell (2020) indicate that there are different types of tourists (such as domestic or international, business or leisure, visiting friends and relatives (VFR), and inbound or outbound). They, together with Camilleri (2018), identify different forms of tourism, for example, cultural and heritage, coastal and marine, nature-based/ ecotourism, sports, events/ festival, rural, medical/ health, culinary, educational, religious, adventure and business tourism (meetings, incentives, conferences and events). These different types of tourism also result in biases when examining travel motivations and behaviours, which highlighted in the theoretical framework presented earlier, is key to understanding demand-side factors that should be considered in domestic tourism marketing strategies and, in the context of COVID-19, recovery strategies.

Dupeyras et al. (2020) emphasise the importance of restoring tourists' confidence and stimulating demand through the use of approaches aimed at highlighting those activities and establishments that comply with COVID-19 hygiene and safety rules and requirements. According to the UNWTO (2020a), countries, mainly around Asia, Europe and the Pacific, are prioritising domestic tourism with the initiation of health and sanitary procedures as well as certifications and indications for safe and hygienic establishments as a step to help restore confidence and trust amongst tourists. Moreover, marketing and promotional movements, special discounts, vouchers, and product development initiatives have emerged (UNWTO, 2020a). Countries such as China have reportedly used market intelligence to forecast domestic tourism's proportion within the country's tourism demand (UNWTO, 2020a). Additionally, Dupeyras et al. (2020) state that New Zealand has established a Tourism Transition Programme to support businesses in market broadening by advising and supporting businesses to pivot towards domestic markets. Arbulú et al. (2021) report that in Spain, under the assumption that 50% of outbound tourism can be reoriented to domestic tourism, this sector can still make approximately 33% of the pre-crisis overnight stays during the COVID-19 pandemic. To stimulate demand, Japan introduced an emergency economic package that offered discounts and vouchers to consumers to support tourism and related activities (transport, food services, and event businesses) with the aim to fast-track post-pandemic recovery (Dupeyras et al., 2020). Chan (2021) states that in Malaysia, the Malaysian Ministry of Tourism channelled its focus on domestic tourism and marketing the country as a safe holiday destination to revive the tourism industry. They further launched a campaign for domestic tourism which introduced various discounts and incentives to encourage people to explore their own country and restore confidence in tourism (Chan, 2021). Africa has also implemented strategies to attract the local market. Products repackaging and discounts initiatives are observed in some of the tourism businesses across South Africa (Sanderson, 2021).

The initiatives highlighted above are aimed at providing special circumstances and support to domestic tourists, tour operators, travel and tourism agents and businesses in order to encourage demand within the sector. For instance, Foo et al. (2020) state that domestic tourism is being used to offset the decrease in international tourists. In this regard, and to help boost domestic tourism, measures such as digital vouchers are being offered for domestic flights, rail travel as well as hotel accommodations (Foo et al., 2020). Similarly, governments in Italy, the Republic of Korea, Iceland and Lithuania also offered travel vouchers to families to spend on domestic travelling (UNWTO, 2020a). Foo et al. (2020) further add that personal income tax relief valued up to RM1000 for domestic travel has also been offered in Malaysia. Moreover, the UNWTO (2020a) gives the instance of Turkey, where the Value Added Tax on domestic airline flights was reduced from 18% to 1% for a 3 month period. In similar efforts, Costa Rica moved all 2020 and 2021 holidays to Mondays so that citizens can use the long weekends for extended domestic travel (UNWTO, 2020b). The UNWTO (2020b) continues to state that Thailand will be subsidising 5 million nights of hotel accommodation at a rate of 40% of the normal rates for a maximum of 5 nights in efforts to encourage domestic tourism.

Businesswire (2021) asserts that the domestic tourism industry globally has helped to mitigate some of the impacts of the COVID-19 pandemic, arguing that governments (and the industry itself) have adopted strategy measures to rebuild and revitalize the sector as well as protect jobs and businesses. Businesswire (2021) further indicates that countries are focusing on creating a more sustainable tourism economy going forward. Some of the measures identified by Businesswire (2021) are increased attention to the impact of social media on the tourism industry, the increase in the popularity of agrotourism and ecotourism (which is important in the South African context where ecotourism is well established and agrotourism has pockets of excellence such as wine tourism with substantial unlocked potential), and the rise in technological advancements. The growth in popularity of rural and nature-based tourism is, according to Businesswire (2021), associated with shifts in preferences to travel to sparsely populated areas to reduce exposure to COVID-19. Businesswire (2021) examines trends in South Korea and Thailand, concluding that rural tourism in many countries can be further developed in relation to prominent areas such as agricultural tourism, gastronomic tourism and health tourism. Businesswire (2021) further asserts that the surge in demand for rural tourism is likely to increase the growth of domestic tourism. This is important in the South African context where growing rural tourism will contribute to the alleviation of poverty and create jobs in these areas.

10.3. Challenges for reigniting domestic tourism

According to the Parliamentary Monitoring Group (PMG, 2015), the main challenges around domestic tourism include establishing an economic and socio-political case that can steer the establishment of a culture of travel among all South African citizens while also encouraging regular travel throughout the year and, secondly, for the travel to be spread across broader geographic barriers. Additionally, the PMG (2018) stresses that issues such as crime, the recession as well as petrol prices in South Africa play a large role in people not travelling. Similarly, the findings of a domestic survey done by the South African Tourism also revealed that the most reported reasons for not travelling domestically were time constraints, unemployment/ lack of income, dislike travelling, cannot afford to travel and no reason to travel (PMG, 2015). The PMG (2015) further asserts these findings by also reporting that the perception that travel is not affordable, lack of understanding of the value and benefit of travel, the belief that international travel is better than domestic and the general lack of disposable income are some barriers to domestic tourism. The lack of discretionary income was also confirmed in a study conducted by Hussain and Fusté-Forné (2021) in New Zealand that revealed that the domestic travel market is impacted negatively by a weak economy which puts pressure on disposable incomes. The PMG (2018) adds that the lack of infrastructure is one of the greatest challenges to promoting domestic tourism. In this regard, PMG (2018) elaborates that well-maintained infrastructure is a priority for people to appreciate inexpensive local travel. This is mainly because the majority of domestic tourists travel by road.

To address the challenges faced by domestic tourism, the 2012 Domestic Growth Strategy adopted the following strategic objectives (NDT, 2018: 1):

- Increase domestic tourism expenditure (revenue);
- Increase domestic tourism volume;
- Enhance measures and efforts aimed at addressing seasonality and equitable geographical spread; and
- Enhance the level of the culture of tourism/ travel among South Africans.

Statistics South Africa (2019a) indicates that the number of domestic tourists in South Africa is growing slightly annually, with 11 961 401 domestic travellers in 2018 compared to 11 508 449 in 2017, mainly to visit friends and relatives, holiday purposes and religious motives with the coastline being key tourist destinations. However, NDT (2018) noted declines in domestic tourism trips in 2015, especially the number of South Africans travelling to visit friends and relatives, which makes up the highest proportion of domestic travellers. Roelf (2020) also raises concern about domestic tourism trends, although still being more than international tourism, and notes that international tourists spend substantially more, on average, than domestic travellers. How to innovatively encourage domestic spending in South Africa needs specific attention since research (Makhaola and Proches, 2017; Pillay, 2017) shows that:

- Domestic tourists spend less on accommodation, with many VFR or opting for lower-priced accommodation such as guesthouses, bed and breakfast and Airbnb establishments.
- Domestic tourists have more flexible travel times and travel throughout the year, which helps deal with seasonality.
- Domestic tourists enjoy travelling during winter (especially travellers from Gauteng, South Africa’s largest domestic tourism market) to KwaZulu-Natal, South Africa’s leading domestic tourism destination). According to Fitchett and Hoogendoorn (2018), the weather is an important aspect to consider concerning tourism, arguing that an improved understanding of the climatic sensitivity of specific tourist groups (including domestic tourists) contributes to improved marketing and the provision of appropriate facilities, infrastructure, services and experiences.
- There are several tourist attractions and products that are underutilised, and there is the potential to unlock further untapped tourist attractions and products.
- Technological advancements have contributed to promoting domestic tourism, especially the widespread use of social media.

Domestic tourists generally participate in multiple activities and, therefore, product mixes/ portfolios and offerings need to be considered. Additionally, in the South African context (as is the case in many developing contexts), domestic tourism is strongly associated with VFR. Pillay (2017) states that converting VFR tourists into bigger revenue streams serve as an opportunity for improvement in the sector, as approximately 70% of domestic travellers travel to visit friends and relatives. Rogerson (2015) adds that the dominance of domestic VFR travellers may be attributed to the historical role and establishments of Bantustans where tourists take trips to rural homes. The rising middle and high-income groups (in numbers and not necessarily in proportion to the total population), especially among previously disadvantaged groups in South Africa, bodes well for domestic tourism, with more persons having disposable incomes. However, understanding the changing profiles of these groups in relation to population groups, gender, spend patterns, interests, and preferences are important for effective marketing. Zátori et al. (2019) in their study revealed that the challenge with VFR tourists is that they are rather passive during a visit and focus on social acts and bonding with minimal spending on tourism products. In addition, VFRs are said to experience a higher incidence of travel-related infectious diseases due to various reasons including the lack of awareness of risk and last-minute travel plans, longer trips, and travel to higher-risk destinations (Backer and Ritchie, 2017; Monge-Maillo et al., 2014). It is important to increase awareness among VFR travellers regarding their unique risks for travel-related infections.

The PMG (2018) states that based on the outcome of the NDT's Domestic Tourism Growth Strategy Review (2016/17), the Department acknowledged the need to develop a Social Tourism Scheme (STS) to allow people with modest incomes to participate in travel and tourism as well as to develop a framework to support tour operators (especially those from previously disadvantaged groups) to facilitate domestic tourism. This makes the promotion of domestic tourism vital in order to ensure that different groups of people are incorporated. In this regard, Ndlovu et al. (2011) found that initiatives such as offering discounts are the most important incentive that can be used to lure domestic tourists. Moreover, tourism marketing campaigns have been initiated by South African Tourism (PMG, 2018). Specifically, TourismTattler.com (2017) also refers to campaigns such as the #Tourismforall which is aimed at empowering South Africans to explore and enjoy travel opportunities in the country. This campaign is centred around universal accessibility in establishments for persons with disabilities and also people of different socio-economic backgrounds (Tourism Tattler.com, 2017). Moreover, the Gogos on Tour initiative by

South African Tourism is another initiative designed to expose the elderly community of the country to travel to local destinations (Tourism Tattler.com, 2017).

The Organisation for Economic Cooperation and Development (OECD, 2020) states that COVID-19 has had an effect on tourism behaviour in general, which has also posed impacts on the recovery and resumption of domestic tourism. Domestic tourism is, however, expected to return quicker and sturdier than international tourism (UNWTO, 2020b). This is anticipated to help economies and protect people’s jobs, and thus, livelihoods (UNWTO, 2020b). Domestic tourism has been detrimentally impacted by COVID-19 and the restrictions thereof, however, the sector is still anticipated to recuperate quickly as restriction measures are steadily lifted (Dizdar, 2020; OECD, 2020). Thus, domestic tourism has the potential to act as an indicator of security and health in many regions in the short-term (Dizdar, 2020; Panashe, 2020). Panashe (2020) shows that the situation is no different in South Africa as domestic tourism is said to present opportunities to help achieve greater and more comprehensive sector growth and job creation. It should be noted that domestic tourism is not expected to make up for international travel in South Africa, but rather, it is expected to bring much-anticipated revenue to the sector (Panashe, 2020). In this regard, Panashe (2020) recommends that initiatives such as discounts, special incentives, rewards for travel across the country and preferential charges be considered to expand and in turn sustain demand to the sector.

According to Woyo (2021), the feasibility of using domestic tourism for the retrieval and resilience of the domestic industry is reliant mainly on the attractiveness and affordability of the tourism product. In this light, there have been challenges and concerns related to the initiatives aimed at supporting and encouraging domestic tourism. For instance, although Malaysia has established measures and incentives to help boost domestic tourism (as outlined above), information on how people can claim or access these incentives had not been released/ communicated at the time of publication of the article (Foo et al., 2020). In New Zealand, Hussain and Fusté-Forné (2021) note that such initiatives incur risks related to achieving the correct product-pricing mix to address domestic demand which are the lack of stakeholder buy-in, resourcing and institutional arrangements. Furthermore, Woyo (2021) states that in Zimbabwe, tourism recovery using domestic tourism will most likely be stagnated by factors including the readiness of domestic tourists to pay, the affordability of the tourism products, the implementation of technologies as well as the performance of the economy. According to Dizdar (2020), a lot of people employed within the labour-intensive tourism sector lost jobs or had to take income cuts due to the COVID-19 pandemic. The plight of these individuals needs to be focused on, including skilling and support to re-enter the tourism sector as recovery takes place.

In addition, the fear of risk might be a challenge for reviving domestic tourism in South Africa. Domestic tourists are more sensitive to risk and are likely to rely more on traveller testimonials than marketing campaigns (WTTC, 2020a). Bama and Nyikana (2021) are of the view that domestic travel will depend on how people perceive this pandemic which cannot be guaranteed. For example, Luo and Lam (2020) found changes in psychological attitudes relating to engaging in socialisation in the hospitality industry among Hong Kong travellers which influenced domestic tourism. The fact that COVID-19 has hit the industry travelling would become expensive, creates a limitation and discourages domestic travellers, in particular (Makhaola and Proches, 2017). Reigniting domestic tourism might be challenged by the long-existing characteristics of lack of daily-organised trips for domestic tourists and high prices over peak seasons which domestic tourists cannot afford (Makhaola and Proches, 2017).

Staycations (staying at home and exploring destinations/ tourists sited where or close to where one is residing) are also becoming prevalent (Chesson, 2020; Davison, 2012), especially during the COVID-19 pandemic. Hess (2020) notes how the president of Singapore encouraged residents to have ‘staycations’ in hotels in the city to assist the accommodation sector to recover during the COVID-19 pandemic. The COVID-19 pandemic resulted in an abrupt halt to the tourism sector, with lockdown regulations and the closure of borders (Roelf, 2020). In light of the COVID-19 pandemic, domestic tourism has become the hope of the tourism industry as it is expected that it has the potential to guide the industry into recovery post COVID-19 (Roelf, 2020; Smith, 2020). In this regard, South Africans are encouraged to explore and enjoy South Africa through staycations (Roelf, 2020; Sawubona, 2020). Specifically, Sawubona (2020) highlights that people could explore their cities, try neighbourhood restaurants and get to know the history of their cities while in turn supporting small businesses. For instance, people in or around Cape Town could explore historical sites such as Table Mountain, which is over 260 million years old and the churches and mosques which are some of the oldest in the country (Sawubona, 2020). Discounted rates and targeted packages are needed. This requires engaging with various supply-side stakeholders such as the accommodation sector, tour agencies and operators, tourism service providers, etc. New forms of travel and consumption should be encouraged, and staycations, in particular, should be studied, both in terms of current patterns and willingness to participate and pay for staycations. Additionally, virtual tourism is growing globally as shown by Griffin et al. (2017) and Njerekai (2020), especially with technological advancements and with COVID-19 pandemic disruptions.

From a research perspective, to understand changing trends and preferences, it is important to systematically and consistently examine domestic tourism market segmentation in relation to key aspects identified by Businesswire (2021):

- Locations and destinations (local or regional travel)
- Mode of booking (online travel agency or direct booking)
- Tour type (conference/ meetings, getaways, adventure tours, organised tours, holiday trips, etc.)

It is important to note that there are already indications that younger age groups are travelling more than older groups, which is understandable given that higher COVID-19 health vulnerabilities are associated with the elderly. The OECD (2020) indicates that tourism businesses are making use of three strategies: ensuring physical distancing and enhancing hygiene, aggressive pricing promotion and engaging customers through social media, and targeting the younger segment.

10.4. Innovative responses that are emerging

The OECD (2020) stresses the need for innovative and transformative strategies within the tourism sector, especially by governments, to equip the sector in light of the new normal presented by the COVID-19 pandemic. Additionally. Akhtar (2021) and Kwok and Koh (2021) postulate that innovations in technology present advantages for the tourism sector in that they are able to offer sustainability for the long run. Gössling (2020) stresses the important role that technology, specifically, Information and Communication Technologies (ICT) has had on tourism. Xiang et al. (2021) add that technology is the only solution for the economy during this pandemic. Moreover, Sharma et al. (2021) state that people who are increasingly trusting technology are ready to connect and are more willing to change any negative point of view towards technology. Businesswire (2021) also note the importance of technological advancements, identifying the increasing and critical role of artificial intelligence, business analytics and smartphones to improve user experiences and efficiencies such as booking tourism packages and making payments. An important aspect for the domestic tourism industry to consider is that social media, according to Businesswire, is becoming a pseudo-travel agent, with reviews and opinions shared on sites influencing travel decisions and choices.

In attempts to resuscitate the sector, destinations and businesses have started offering travellers virtual experiences (WTTC, 2020b). In this regard, Chirisa et al. (2020) state that virtual tourism is able to reach a very large audience. Moreover, virtual tourism also helps tourism abide by social distancing regulations or for those who do not want to travel under the current circumstances but do want to get away (Xiang et al., 2021). Aminy (2020) adds that, in this regard, technology in light of the COVID-19 pandemic has allowed for the use of virtual reality for tourism activities helping countries globally offset the negative impacts of the pandemic while also maintaining the interest of tourists. This has the potential to help the tourism sector within many countries, including African countries, keep income flowing in as well as maintain stability during the COVID-19 pandemic (Chirisa et al., 2020). This is because many organisations have used digital platforms to ensure that exploring and learning may proceed despite the COVID-19 pandemic (Development of the United Nations Educational, Scientific and Cultural Organisation [UNESCO] Natural and Cultural assets [DUNC], 2020). Evidently, a digital revolution holds the key to the continued sustainability of the tourism sector (Dizdar, 2020). For example, Springwise (2020) shows that the Faroe Islands in Denmark have initiated remote-controlled virtual tour guides which allow tourists from across the globe to go on self-guided tours of the archipelago. This is made possible by camera-wearing locals who respond to sight-seeing commands from tourists at home which allows these tourists to virtually control their own routes using a free app that allows them 2 minutes of control of the guide who additionally provides a commentary (Springwise, 2020). Moreover, Springwise (2020) states that the Stadt hotel located in Lidkoping, Sweden has opened up rooms to be used as private restaurants for people to be able to go out to eat while adhering to social distancing regulations by using a private room where orders are placed telephonically.

In South Africa, a long-distance relationship-themed campaign “We are worth waiting for” was created by Cape Town tourism where initiatives such as postcards, historical information, video and vision board were created and shared on social media so as to keep the city on the minds of tourists while the COVID-19 regulations are in place (Fröhlich, 2020; Nkanjeni, 2020; Springwise, 2020). Nkanjeni (2020) adds that the campaign uses social media to encourage people to adhere to COVID-19 regulations such as social distancing to help flatten the pandemic curve so that travel may be possible again. These features were also aimed at broadening people’s virtual knowledge of Cape Town and the vision board was aimed at inspiring visitors for future travel through images they could pin on the official website that they can then save on Pinterest (Springwise, 2020).

African safari organisations from various parts of the continent also joined the movement towards virtual tours (Billock, 2020; Fröhlich, 2020; Sallent, 2020). These range from recorded safari videos featuring a live host to real-time streams on social media (Billock, 2020). Specifically, a virtual tour live stream campaign was initiated in Kenya under the hashtag #MagicAwaits (Fröhlich, 2020; Sallent, 2020). In this regard, Sallent (2020) states that this campaign was an effort by the Kenya Tourism Board to showcase the game safaris in the country. These Livestream videos as well as other attractions in Kenya are available on social media under the handle 'Magic Kenya' (Sallent, 2020). In South Africa, Billock (2020) reports that Singita offers live virtual game drives through the Sabi Sand Game Reserve. During these game drives, the viewers are able to use Instagram to watch the Livestream and interact with the tour guide (Billock, 2020). Similarly, Tswalu Kalahari, which is the biggest privately owned reserve in South Africa, offers live show game drives (Billock, 2020). Billock (2020) adds that these Livestreams are called EcoLive and are streamed on the Tswalu website twice daily.

The OECD (2020) and WTTC (2020a) note key trends that need to be considered when addressing any recovery strategy:

- Demand evolution (the shift in traveller behaviours and adaptations among tourism businesses)
- Health and hygiene (the focus on personal experiences, trust for health and safety, business readiness to practice during and post COVID-19)
- Innovation and digitisation (the use of innovative platforms and technologies as well as enhancing the tourism knowledge model and developing new observation methods and indicators)
- Sustainability (attempts to examine widespread unemployment, racism, environmental well-being and protection)

Baratti (2021) and the WTTC (2020b) state that to reduce physical contact, consumers are now relying more on innovations such as contactless technologies. This includes the adoption of the use of contactless payments, biometrics as well as e-gates at airports (Garcia, 2020; WTTC, 2021b). Businesses have also had to fast track the process of digitisation. In this regard, key players in the tourism sector, including hospitality and transportation providers, have worked towards improving or initiating contactless services (Baratti, 2021). For instance, several establishments like airports, hotels and theme parks have introduced mobile applications for the convenience of consumers (Baratti, 2021).

Initiatives such as replacing a physical passport with a digital identity for travellers have been noted as important developments to minimise the touchpoints that travellers have to go through (Garcia, 2020; WTTC, 2020b). Garcia (2020) reports on the One ID initiative by the International Air Transport Association (IATA) which is aimed at switching from paper passports to biometric identification as one such initiative. In this instance, biometric identification systems such as a facial scanner, fingerprints and palm scan serve as the basis of the One ID project (Garcia, 2020). Romano (2018) shows that airports such as the Hongqiao Airport in Shanghai have already introduced a face scan check-in system to fast track the check-in process.

Research shows that thermal video screening technology has been adopted by certain players in the tourism sector to measure the body temperature of individuals (Baratti, 2021). Within the travel sector, this technology has particularly been useful in spaces such as airports as one of the COVID-19 screening methods (Baratti, 2021). Similarly, hotel practitioners are also using artificial intelligence for services that include temperature checks as well as facial check-in and check-out for guests (Lau, 2020). According to Lau (2020), various hotels in Guangzhou, northwest of Hong Kong, have adopted these systems for non-contact body temperature measures as well as facial recognition to decrease the crowding of people in these spaces as well as to decrease the cross-infection risks.

Simon (2020) reports on the contactless check-in system that has been introduced by Canary Technologies to be used by hotels for their guests. Canary Technologies, a hospitality innovator in Silicon Valley, launched this system to assist hotels to welcome their guests safely and efficiently (Hospitality Net, 2020). This mobile method allows guests to check in while avoiding physical contact (Hospitality Net, 2020; Simon, 2020). Hospitality Net (2020) and Simon (2020) add that the hotel staff provide the guest with a link that they are able to use to check-in by following a few steps. This link allows for the guests to verify their identity and serve as a means of payment.

Baratti (2021) highlights the adoption of the digital key initiative using the Hilton Hotel as an example. Specifically, this initiative allows guests to unlock their hotel rooms through their phones using the Hilton Honours Programme application. Furthermore, Lau (2020) elaborates that hotels in Guangzhou have also started using robots to fulfil the roles of hotel staff as fewer staff members are physically at work. According to Lau (2020), these robots are used in the food and beverage departments for room dining services, delivering housekeeping material, assisting the waiting staff as well as distributing hand sanitiser and face masks.

The enhancement of digital and social media platforms is imperative for the tourism sector, especially for marketing purposes (Akhtar, 2021). According to Lau (2020), live streaming through social media platforms has been used by various resorts and hotels for live promotions. Here, these establishments are able to work with public figures who make these videos as tour guides, taking viewers around the establishment virtually as a marketing strategy (Lau, 2020). Akhtar (2021) and Lau (2020) state that this method allows viewers to engage with the content, sharing ideas and communicating with the establishment. In South Africa, Maylie (2020) reports that for tourism businesses like Buja Tours and Safaris, it has been crucial to keep in constant communication with clients. To achieve this, social media has been key as the business consistently sends WhatsApp text messages to key clients around the world so as to encourage them to keep South Africa in mind for future visits (Maylie, 2020).

Live-stream conferences have also reportedly taken over face-to-face conferences (Lau, 2020). Moreover, the increased use of web conferencing has been well received by the events industry (WTTC, 2020b). This is also because the virtual route has increased exposure and thus, strengthened the events industry through the acquisition of new audiences (WTTC, 2020b). Virtual conferences present opportunities and advantages for both the organisers and the attendees (Lau, 2020). Specifically, Lau (2020) states that attendees are able to attend events from the comfort of their homes which reduces money spent, time used to travel as well as any negative health impacts. For organisers, they are able to enhance the means of content delivery, better networking opportunities and extended sponsorship alternatives (Lau, 2020). In South Africa, tourism businesses such as Zulu Nomad have also taken advantage of this adaptive strategy by hosting webinars (Maylie, 2020). In this regard, Maylie (2020) states that Zulu Nomad runs these webinars for other tourism establishments in an attempt to equip the players in this sector for a digital future.

Needless to say, cyber threats have increased with the shift to relying more on technology (Kwok and Koh, 2021; WTTC, 2020b). In this regard, Lau (2020) stresses the importance of making sure that people's privacy is protected. Thus, establishments have had to take serious cybersecurity measures towards guarding consumer data against breaches (WTTC, 2020b). This includes having to adhere to improved legislation like the Protection of Personal Information Act (PoPIA) in South Africa, which is aimed at protecting consumers' personal data (WTTC, 2020b).

11. Primary data analysis

11.1. Tourism service provider survey results

11.1.1. Profile of tourism service provider

Respondents were asked which part of the sector is the main activity the organisation/ business is involved in as well as other type/s of tourism services or activities. Table 1 reflects the wide ranging activities and services that are part of the tourism sector and also indicates that the methodological approach adopted for this research was appropriate to attain responses from diverse tourism-related businesses and organisations. It is important to note that most businesses/ organisations that participated in the study engaged in multiple activities. The main activities that businesses/ organisations were involved in with more than 5% of responses were restaurants (22.4%), accommodation facility (21.7%), retail of goods targeting tourism (8.4%), transport provision (7.6%), cultural tourism (6.2%), tour guiding (6.2%), tourism agency (5.9%), tour operators (5.7%) and tourism activities/ experiences (such as safaris, horse riding, deep sea fishing, etc.) (5.2%). The other activities that businesses/ organisations were involved in with more than 5% of responses were restaurants (19.5%), accommodation facility (11.6%), transport provision (9.9%), cultural tourism (9.9%), tour guiding (9.4%), tourism activities/ experiences (such as safaris, horse riding, deep sea fishing, etc.) (9.4%), retail of goods targeting tourism (8.1%), Meetings, Incentives, Conventions and Exhibition (MICE) segment (6.9%), business tourism (including MICE) (6.7%) and tour operators (6.2%). Several other services and products are provided by tourism service providers. The diverse and multiple activities that tourism service providers are involved in reinforce concerns highlighted in the literature that the disruptions associated with the COVID-19 pandemic have wide ranging impacts and implications. It is also important to note that many of the businesses and organisations utilise goods and services from other service providers (such as the food and beverages sector and financial services). Thus, impacts were and will be felt across the tourism value chain beyond the establishments that were the focus of this study.

Table 1: Tourism subsector that us the <u>main</u> activity of the organisation/ business and <u>other</u> type/s of tourism services or sectors the organisation/ business is involved in (n=406)

	Main		Other (Multiple responses)	
	Frequency	Percent	Frequency	Percent
Tour operators	23	5.7	25	6.2
Tourism agency	24	5.9	11	2.7
Tour guiding	25	6.2	38	9.4
Tourism activities/ experiences (such as safaris, horse riding, deep sea fishing, etc.)	21	5.2	38	9.4
Meetings, Incentives, Conventions and Exhibition (MICE) segment	4	1.0	28	6.9
Business tourism (including MICE)	5	1.2	27	6.7
Nature-based/ ecotourism (conservancies, reserves, coastal/ beach, etc.)	12	3.0	17	4.2
Sport tourism	8	2.0	9	2.2
Cultural tourism	25	6.2	40	9.9
Accommodation	88	21.7	47	11.6
Transport	31	7.6	40	9.9
Restaurant	91	22.4	79	19.5
Retail of goods targeting tourism	34	8.4	33	8.1
Eventing	-	-	3	.7
Financial services	2	.5	-	-
General retail at tourism destination	2	.5	-	-
Photography	2	.5	3	.7
Providing tourism-related information	1	.2	-	-
Local Government (tourism destination marketing and management mandate)	1	.2	-	-
Marketing agency	1	.2	-	-
Destination Management Organisation	1	.2	1	.2
Art gallery	1	.2	-	-
Caterer	1	.2	-	-
Cinema	1	.2	-	-
Community Tourism Organisation	1	.2	-	-
Tourism training	1	.2	-	-
Laundromat	-	-	1	.2
Nightclub	-	-	1	.2
Sale of food items	-	-	1	.2
Truth Telling experience of Apartheid - Dark tourism	-	-	1	.2

Table 2 shows the provinces where the businesses and organisations were located in relation to the type of area. The dominance of specific provinces and town/ urban areas correlates with the spatial concentration of tourism activities in South Africa as well as the methodological approach adopted since online surveys rely on internet connectivity and the face-to-face interviews were concentrated in KwaZulu-Natal (Durban and St Lucia specifically) as well as the Western Cape (Cape Town), Gauteng (Johannesburg) and the Northern Cape (Kimberley). While the responses are not proportionate to the population distribution in South Africa, as indicated earlier, the different types of tourism businesses and organisations and a national spread permit trends analyses to be undertaken.

Table 2: Province in which business/ organisation is located in relation to type of area (n=406, in %)

	Town/ urban area (not township)	Township	Rural
Eastern Cape	.7	-	1.5
Free State	.5	-	-
Gauteng	14.8	5.2	.7
KwaZulu-Natal	45.1	.2	.7
Limpopo	.2	-	.5
Mpumalanga	-	.2	.2
Northern Cape	6.9	.5	-
Western Cape	20.0	.5	1.2

Specifically, in terms of the province in which the businesses and organisations were located, Figure 4 indicates that most were in KwaZulu-Natal (46.1%) followed by the Western Cape (21.7%), Gauteng (20.7%) and the Northern Cape (7.4%) where data collection was concentrated. The high number of responses in KwaZulu-Natal is attributed to a focus on this province because it is the main domestic tourism destination in South Africa and two locations were targeted for face-to-face interviews: Durban as the main tourism destination and St Lucia as a key nature-based tourism town.

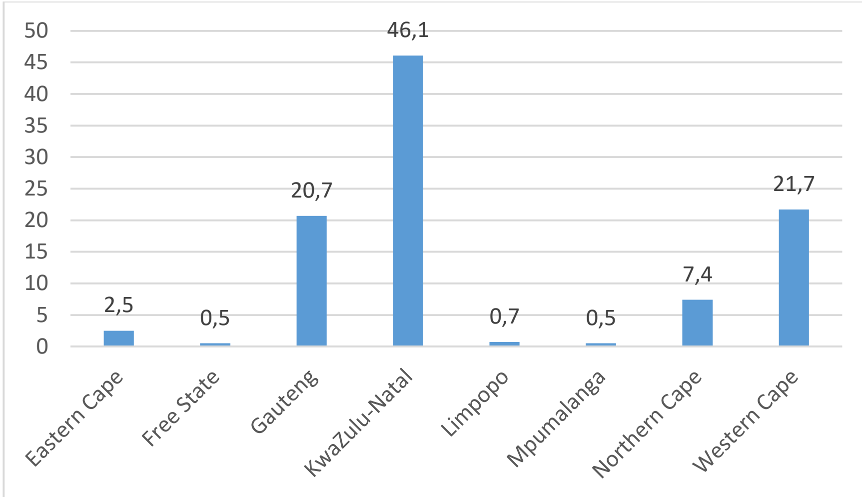


Figure 4: Province in which business/ organisation is located (n=406, in %)

Table 3 indicates that most of the businesses and organisations interviewed were located in urban centres or towns (88.4%) followed by townships (8.1%). The lowest proportion of interviews (3.4%) were in rural areas. This reflects the urban dominance of tourism, as indicated earlier.

Table 3: Type of area in which business/ organisation is located (n=406)

	Frequency	Percent
Urban/ town	359	88.4
Rural	14	3.4
Township	33	8.1

In terms of the employment trends, respondents were asked how many people (including self and excluding volunteers) were employed on a permanent or temporary/ casual basis prior to the COVID-19 pandemic and at the time of the interview. A volunteer is defined as an individual who assists an organisation or business to do certain job/s for a small stipend, in-kind benefit (for example, a free lunch) or without any financial or non-financial remuneration. In relation to the number of persons employed prior to the pandemic, Figure 5 shows that in terms of permanent staff, most organisations/ businesses stated between 1 and 10 (micro enterprises) (47.3%) and between 11 and 50 (small enterprises) (41.9%) people. Fewer respondents stated between 51 and 250 (medium enterprises) (3.9%) and more than 250 (large enterprises) (0.7%) people. A few respondents (6.2%)

did not respond. Additionally, 43.8% of the organisations/ businesses employed 1-10 persons on a temporary/ casual staff prior to the pandemic. Furthermore, 7.1% employed 11-50, 1.5% employed 51-250 and 0.2% employed more than 250 persons on a temporary/ casual. Close to half of the respondents (47.3%) indicated that the business/ organisation did not employ persons on a temporary/ casual basis. The results, which correlate to the turnover figures, show that a large proportion of businesses/ organisations in the tourism-related sector are individual, micro and small enterprises. These types of businesses are also likely to be more vulnerable and less resilient to cope with disruptions such as the COVID-19 pandemic.

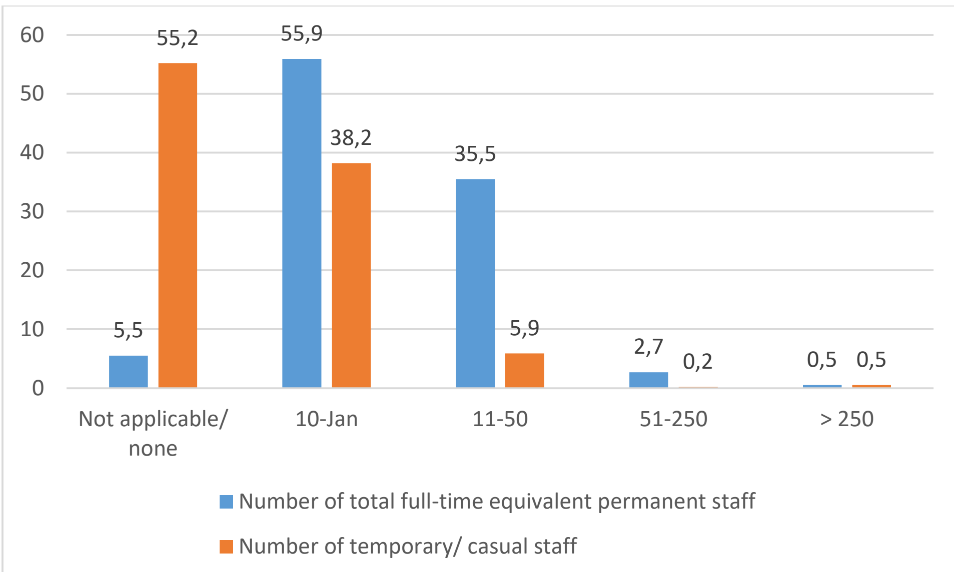


Figure 5: Number of people the organisation/ business employed on a permanent or temporary/ casual basis prior to the COVID-19 pandemic, excluding volunteers (n=406, in %)

In relation to the number of persons employed at the time of the interview, Figure 6 shows that in terms of permanent staff, most organisations/ businesses stated between 1 and 10 (micro enterprises) (55.9%) and between 11 and 50 (small enterprises) (35.5%) people. Fewer respondents stated between 51 and 250 (medium enterprises) (2.7%) and more than 250 (large enterprises) (0.5%) people. A few respondents (5.4%) did not respond. Additionally, 38.2% of the organisations/ businesses employed 1-10 persons on a temporary/ casual staff prior to the pandemic. Furthermore, 7.1% employed 11-50, 1.5% employed 51-250 and 0.2% employed more than 250 persons on a temporary/ casual. Slightly more than half of the respondents (55.2%) indicated that the business/ organisation did not employ persons on a temporary/ casual basis. The results, when compared to pre-COVID figures, indicate a trend that fewer persons were employed by businesses/ organisations and that more businesses/ organisations employed persons on a casual/ temporary basis. The loss of jobs and employment disruptions are highlighted in the literature with dire socio-economic consequences, especially given that the tourism sector is a major employer and contributor to the GDP.

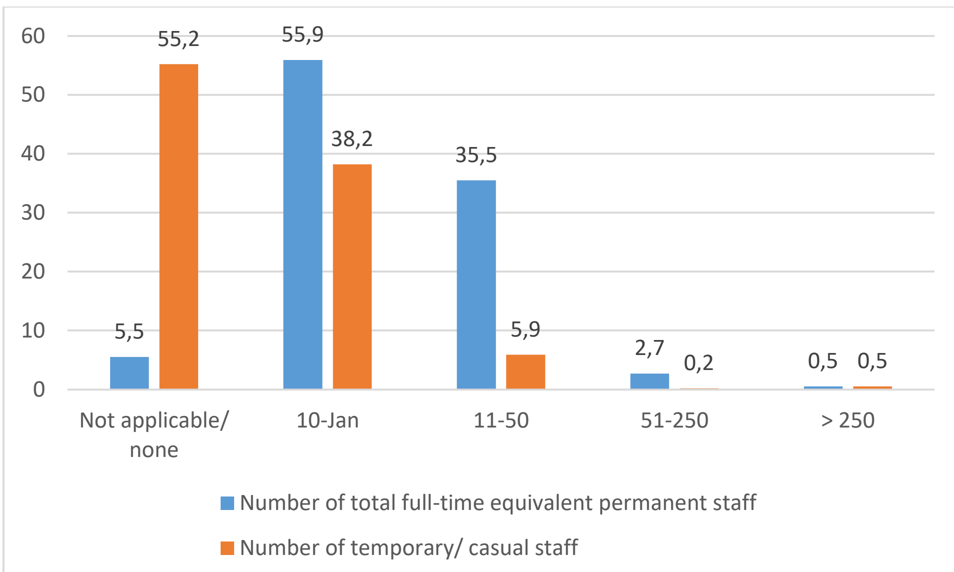


Figure 6: Number of people the organisation/ business employed on a permanent or temporary/ casual basis at the time of the interview, excluding volunteers (n=406, in %)

The Table below indicates the number of years businesses/ organisations were operational. A few of the respondents (1.2%) did not respond or indicated not sure. More than half of the businesses/ organisations (56.4%) were fairly well established, being operational for more than 10 years. Specifically, 34% of the respondents stated more than 20 years, 12.8% indicated more than 15 to 20 years and 9.6% noted more than 10 to 15 years. Twenty percent of the respondents indicated that businesses/ organisations were operational more than 5 to 10 years while 14.8% stated 2 to 5 years. The lowest proportion (7.6%) was for less than 2 years. Some businesses have started in the last five years and are more likely to be vulnerable to such severe and widespread disruptions.

Table 4: How long the organisation/ business has been operational (in years) (n=406)

	Frequency	Percent
No response/ not sure	5	1.2
Less than 2	31	7.6
2 to 5	60	14.8
More than 5 to 10	81	20.0
More than 10 to 15	39	9.6
More than 15 to 20	52	12.8
More than 20	138	34.0

Respondents were asked to state the average annual turnover category for the business/ organisation, if applicable, prior to the COVID-19 pandemic and currently (that is, at the time of the interview). Turnover refers to the total value of sales or revenue generated by the business/ organisation in the last financial year or gross income, which is the total takings before expenses and taxes are deducted. The results indicate that 8.1% of the respondents did not respond, did not know or regarded the information as confidential (Table 5). A further 8.9% and 5.4% of the respondents indicated not applicable (does not generate an income) prior to the pandemic and at the time of the interview, respectively, since this study included tourism service providers that are not businesses. It is interesting to note that some of the organisations that did not generate an income prior to the pandemic have transitioned to generating revenues given the higher percentage prior to the pandemic (8.9%) compared to at the time of the interview (5.4%). A few respondents indicated not applicable since they were not operational prior to the pandemic (1.2%) and at the time of the interview (2.2%). Though slight, the increase in the number of businesses/ organisations that are not operating is of concern and is highlighted in the literature as well.

The results show that businesses/ organisations in the tourism sector vary in turnover. This also reflects that methodologically different types of businesses/ organisations participated in the study. Among the businesses/ organisations that did indicate turnover categories prior to the pandemic and at the time of the interview (close to two years into the pandemic), a discernible trend is that more businesses/ organisations had higher turnovers prior to the pandemic which has now dropped. This is specifically discernible in the following categories:

- R201 000 – R500 000 (11.8% prior to the pandemic and 10.6% at the time of the interview)
- R1 000 001 – R5 000 000 (22.7% prior to the pandemic and 15.3% at the time of the interview)
- R5 000 001 – R15 000 000 (11.8% prior to the pandemic and 4.9% at the time of the interview)
- R15 000 001 – R40 000 000 (2.7% prior to the pandemic and 2% at the time of the interview)
- More than R40 000 000 (2% prior to the pandemic and 0.5% at the time of the interview)

Only one (R500 001 – R1 000 000) more than R200 000 category showed an increase from 10.8% prior to the pandemic to 13.3% at the time of the interview.

On the other hand, lower turnover categories showed an increase from prior to the pandemic to the time of when the interview was held, specifically:

- < R50 000 (6.7% prior to the pandemic and 15% at the time of the interview)
- R50 000 – R100 000 (6.2% prior to the pandemic and 13.1% at the time of the interview)
- R101 000 – R200 000 (7.1% prior to the pandemic and 9.6% at the time of the interview)

This study included tourism organisations who, although are not typical businesses in relation to turnover, can leverage resources, funding and disseminate information for the sector and were, therefore, included. These organisations are also likely to have indicated not applicable (that is, not generating an income) (8.9% prior to the pandemic and 5.4% at the time of the interview). They often play an important role in supporting the sector and representing the views of tourism stakeholders.

Table 5: Business/ organisation's overall annual (for a year) average income prior to the COVID-19 pandemic and at the time of the interview (currently) (n=406, in %)

	Prior to the COVID-19 pandemic	Currently
Don't know/ No response/ Confidential	8.1	8.1
Not applicable (does not generate an income)	8.9	5.4
Not applicable (no longer operational)	1.2	2.2
< R50 000	6.7	15.0
R50 000 – R100 000	6.2	13.1
R101 000 – R200 000	7.1	9.6
R201 000 – R500 000	11.8	10.6
R500 001 – R1 000 000	10.8	13.3
R1 000 001 – R5 000 000	22.7	15.3
R5 000 001 – R15 000 000	11.8	4.9
R15 000 001 – R40 000 000	2.7	2.0
More than R40 000 000	2.0	.5

The decline in turnover reflects a change in income status. The changes from turnover prior to the pandemic to at the time of the interview were further categorised into no change/ remained in the same category, increased or decreased. As Figure 7 shows, more than half of the businesses/ organisations (54.4%) experienced a decline in turnover over the last two years, denoting the severe impact of the pandemic on the tourism sector. For 24.6% of the businesses/ organisations, the turnover category remained the same. Given that each category has a large range, it is possible that many of these businesses/ organisations experienced a decline in turnover that was not recorded in relation to how the question was posed. Only 7.1% of the businesses/ organisations experienced an increase in turnover from one category to another. The results also show that while businesses/ organisations in the tourism sector vary in turnover, a substantial proportion have an annual turnover of less than R1 million or less per year (42.6% prior to the pandemic and 61.6% at the time of the interview), which makes them more vulnerable and less able to leverage resources to deal with the severe changes in the economy and disruptions that are associated with the COVID-19 pandemic.

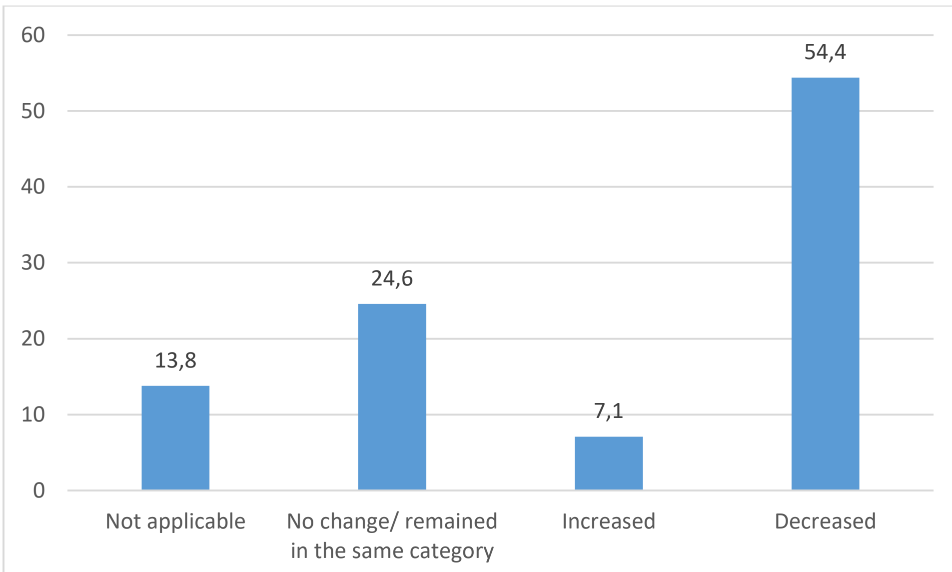


Figure 7: Change in income status (n=406, in %)

The chi-square test results from cross-tabulations examining the associations between selected business profile (the main activity the tourism service provider is involved in, provincial location of tourism service provider, number of persons employed at the time of the interview and number of years business was operational) variables and change in income status are presented in Table 6. For most profile variables, associations were noted with P values being less than .05 for change in income (highlighted in yellow). An examination of the cross-tabulation results indicates that in relation to the main type of tourism business, a decrease in income from prior to the pandemic to at the time of the interview was mainly noted among accommodation establishments, cultural tourism, restaurants, retail establishments, tour guides and tour operators. In terms of provincial location, more businesses in KwaZulu-Natal and Gauteng experienced a higher decrease in income which could be related to the social unrest experienced. In terms of turnover, more of the tourism service providers with lower turnovers, experienced decreases in income. This reiterates assertions in the literature that economically less established tourism businesses (and service providers more general) were more vulnerable. Tourism service providers that were more established (operating for more than 10 years) had an increase in income.

Table 6: P values of chi-square test results examining associations between selected business profile variables and change in income as well as if operational at the time of the interview

	Change in income status from prior to the pandemic to the time of the interview
Main activity tourism service provider involved in	.002
Provincial location of tourism service provider	.000
Turnover at the time of the interview	.000
Number of persons employed at the time of the interview	.025
Number of years operational	.001

Table 7 indicates the status of business/ organisational activities prior to the March 2020 Level 5 lockdown, at January 2021, at the time of the interview (currently) and when the COVID-19 virus is contained/ under control in relation to the COVID-19 crisis. Prior to the March 2020 lockdown, most of the businesses/ organisations (80%) were fully operational (continuing with most business activities) with only a few not operating at the time (11.8%), closed (cancelled or indefinitely postponed work) (4.9%) or operating with 60% - 80% of normal business activities (2.5%). One business/ organisation was operating with about half (50%) of normal business activities and two were operating less than half (50%) of normal business activities. The situation changed from the time of the March 2020 lockdown and at January 2021 almost all the businesses were not fully operational, with only 3.4% being fully operational. Given that South Africa had a Level 5 lockdown, it was assumed that all tourism businesses and organisations would be impacted and, therefore, the question focused on the status at January 2021. Most of the businesses/ organisations (69.9%) were either operating with about half (50%) of normal business activities (31%) or less than half (50%) of normal business activities (38.9%). Furthermore, 10.8% of the businesses/ organisations were operating with 60% - 80% of normal business activities. Additionally, 7.1% were closed (cancelled or indefinitely postponed work) and 4.7% were not operational at the time. The results indicate that at the time of the interview (November and December 2021), some level of recovery is underway. Specifically, 45.6% of the businesses/ organisations were fully operational (continuing with most business activities) or operating with 60% - 80% of normal business activities (32%). Substantially fewer businesses were either operating with about half (50%) of normal business activities (10.8%), less than half (50%) of normal business activities (5.9%), were not operational (1.7%) or were closed (1.2%).

The respondents anticipated the recovery trend to continue with 72.9% stating that their businesses/ organisations will be fully operational (continuing with most business activities). It is important to note that this is slightly lower than the pre-COVID responses. A further 12.3% of the businesses/ organisation expect to be operating with 60% - 80% of normal business activities. Only a few respondents stated that the business/ organisation will be operating with about half (50%) of normal business activities (3%), less than half (1%) of normal business activities (5.9%), not operational (2%) or will be closed (1.7%). While a slight increase, it is interesting to note that 1.7% (more than the response at the time of the interview) indicated that they will be closed when the COVID-19 virus is under control, reinforcing concerns raised in the literature that some businesses will not recover and are likely to exit the tourism sector.

The responses reveal that tourism businesses/ organisations have experienced substantial changes in the last two years: prior to and during the pandemic as well as perceptions related to when the virus is under control. The trends reveal that most tourism service providers are on a pathway to recovery, which bodes well for the sector as a whole. From a domestic tourism perspective, it is important to establish the extent to which domestic tourism is contributing to this recovery and what can be done to support quicker recovery. More importantly, the role of domestic tourism to support those service providers who are unlikely to fully recover may leave the tourism sector or who have already left the tourism sector should be focused on. Furthermore, it is important to support initiatives taken by the tourism service providers and more critically examine which external support mechanisms (such as funding) has aided in the recovery of tourism service providers.

Table 7: Status of the business/ organisational activities prior to the March 2020 Level 5 lockdown, at January 2021, at the time of the interview (currently) and when the COVID-19 virus is contained/ under control in relation to the COVID-19 crisis (n=406, in %)

	Prior to the March 2020 Level 5 lockdown	At January 2021	Currently	When the COVID-19 virus is contained/ under control
No response	-	3.9	2.7	7.1
Not applicable (was not operational at that time)	11.8	4.7	1.7	2.0
Fully operational (continue with most business activities)	80.0	3.4	45.6	72.9
Operating with 60% - 80% of normal business activities	2.5	10.8	32.0	12.3
Operating with about half (50%) of normal business activities	.2	31.0	10.8	3.0
Operating less than half (50%) of normal business activities	.5	38.9	5.9	1.0
Closed (cancelled or indefinitely postponed work)	4.9	7.1	1.2	1.7

The chi-square test results from cross-tabulations examining the associations between selected business profile (the main activity the tourism service provider is involved in, provincial location of tourism service provider, number of persons employed at the time of the interview and number of years business was operational) variables and the status of the service provider activities prior to the March 2020 Level 5 lockdown, at January 2021, at the time of the interview and when the COVID-19 virus is contained/ under control are presented in Table 8. For most profile variables, associations were noted with P values being less than .05 for all periods under examination (highlighted in yellow). Cross-tabulation results in relation to the status of the tourism service provider prior to the March 2020 lockdown show that more restaurants, retail and transport service providers were not operational with more KwaZulu-Natal service providers being fully operational. No associations were noted for turnover at the time of the interview and the number of persons employed at the time of the interview. In relation to the number of years operational, tourism service providers who have been operational for longer were more likely to be fully operational. In terms of the status of the tourism service providers at January 2021, accommodation, cultural tourism, restaurants, retail establishments and tour guides/ operators were more likely to be operating less than 50%. This is unsurprising given that these are customer-dependent tourism service providers. More KwaZulu-Natal and Gauteng tourism service providers with lower turnovers and a smaller number of employers that were operational for less than 10 years were more likely to be operating with less than 60% activities.

In relation to the status at the time of the interview and when the COVID-19 virus is contained/ under control, with no association discernible in relation to the main activity of the tourism service provider. More tourism service providers located in KwaZulu-Natal and Gauteng were operating at less than 60% capacity at the time of the interview and more tourism service providers in KwaZulu-Natal anticipate being fully operational post the COVID-19 pandemic. Tourism service providers with lower turnovers, a smaller number of employees and have been operational for less than 10 years were more likely to be operating less than 60% of activities at the time of the interview while those with higher turnovers, a higher number of employees and have been operational for longer expect to be fully operational post the pandemic. The results indicate that tourism service providers involved in customer-dependent activities located in Gauteng and KwaZulu-Natal with lower turnovers, a smaller number of employees and operational for fewer years are more vulnerable to pandemic impacts and are likely to take longer to fully recover.

Table 8: P values of chi-square test results examining associations between selected business profile variables and the status of the tourism service provider prior to the March 2020 Level 5 lockdown, at January 2021, at the time of the interview and when the COVID-19 virus is contained/ under control

	Status prior to the March 2020 lockdown	Status at January 2021	Status at time of the interview	Status post the COVID-19 pandemic
Main activity tourism service provider involved in	.002	.000	.132	.932
Provincial location of tourism service provider	.000	.000	.000	.000
Turnover at the time of the interview	.156	.000	.000	.000
Number of persons employed at the time of the interview	.571	.009	.000	.000
Number of years operational	.000	.000	.000	.001

11.1.2. COVID-19 pandemic impacts on domestic tourism in South Africa

The focus of this study is on reigniting domestic tourism. Tourism service providers were asked to share their perceptions in relation to domestic tourism in South Africa. The businesses'/ organisations' perceptions echo those expressed in the literature that domestic tourism has been severely impacted by the COVID-19 pandemic disruptions. Specifically, Table 9 shows that most respondents indicated declines in the number of customers/ clients during high season (79.8%), cash flow available to domestic tourism service providers (78.1%), number of customers/ clients during off/ low season (75.4%) and sales/ demand for domestic tourism goods and services (66.7%). Close to half of the respondents (51.2%) stated that the supply of goods and services to domestic tourism service providers/ businesses declined with 19.7% of respondents noting that the supply of goods and services remained the same.

The economic disruptions associated with the pandemic are evident. However, in relation to the ability of domestic tourism service providers to access financial support such as loans and grants, only 28.1% indicated that this has increased while 36.2% stated decreased. A few (12.8%) stated remained the same and 22.9% did not know. This suggests that while financial impacts were widespread, financial support was limited.

Table 9: Extent to which domestic tourism generally in South Africa was impacted in relation to the aspects below as a result of the COVID-19 pandemic (n=406, in %)

	Increased	Decreased	Remained the same/ no change	Not applicable/ don't know
Sales/ demand for domestic tourism goods and services	28.1	66.7	3.2	2.0
Cash flow availability to domestic tourism service providers	2.5	78.1	9.9	9.6
Ability of domestic tourism service providers to access financial support such as loans and grants	28.1	36.2	12.8	22.9
Supply of goods and services to domestic tourism service providers/ businesses interrupted	12.8	51.2	19.7	16.3
Number of domestic travellers in South Africa	14.8	72.4	6.4	6.4
Number of customers/ clients during off/ low season	11.6	75.4	7.4	5.7
Number of customers/ clients during high season	7.4	79.8	5.7	7.1

In relation to the length of time that respondents think it will take for domestic tourism to fully recover from the negative impacts of the COVID-19 pandemic, Figure 8 shows that the majority of the respondents (74.9%) stated one year to less than two years (31.8%) and two years to less than five years (43.1%). Only a few respondents (6.2%) stated less than one year, five years to less than ten years (9.6%) and ten years and more (2.7%). Additionally, 6.7% of the respondents stated that they did not know. The responses show that most respondents perceived the recovery period as being between 2 to 5 years, which is a lengthy period for tourism businesses, in particular, to financially cope.

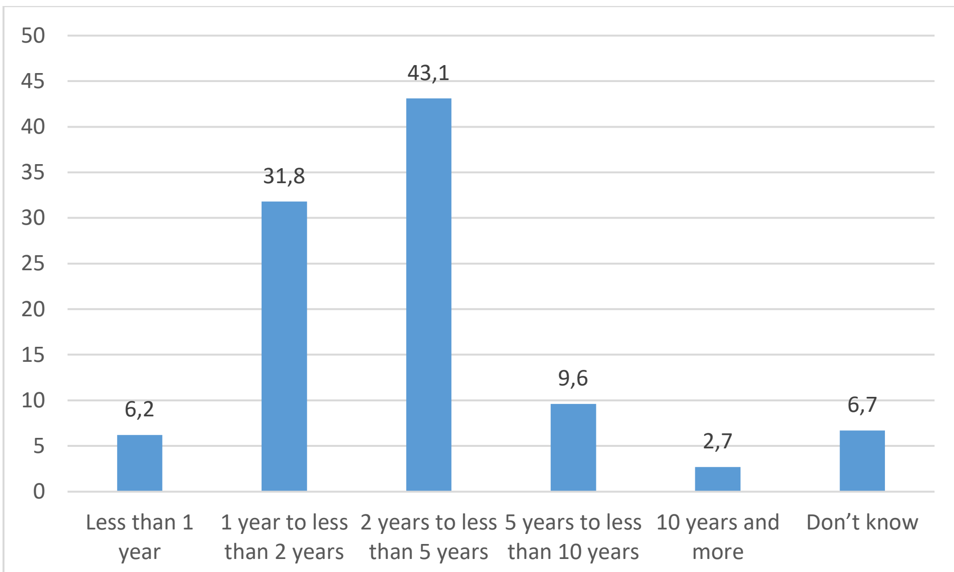


Figure 8: How long it will take for domestic tourism in South Africa to fully recover from the negative impacts of the COVID-19 pandemic after the COVID-19 pandemic has been brought under control (n=406, in %)

The chi-square test results from cross-tabulations examining the associations between selected business profile (the main activity the tourism service provider is involved in, provincial location of tourism service provider, number of persons employed at the time of the interview and number of years business was operational) variables and length of time it will take for the domestic tourism sector to fully recover after the COVID-19 pandemic has been brought under control are presented in Table 10. Associations were noted with P values being less than .05 for three profile variables while no associations were noted for the provincial location of tourism service providers and the number of persons employed at the time of the interview. Accommodation, cultural tourism, tour guides and tour operators were more likely to note longer recovery times (more than 2 years), linked to the reliance on tourists to recover. Tourism service providers with lower turnovers and operating for fewer years were also more likely to anticipate a longer recovery period.

Table 10: P values of chi-square test results examining associations between selected tourism service provider profile variables and length of time it will take for domestic tourism to fully recover after the COVID-19 pandemic has been brought under control

	Length of time it will take for domestic tourism in South Africa to recover
Main activity tourism service provider involved in	.004
Provincial location of tourism service provider	.422
Turnover at the time of the interview	.000
Number of persons employed at the time of the interview	.331
Number of years operational	.000

Although most respondents indicated that domestic tourism will fully recover when the COVID-19 pandemic is under control, Table 11 indicates that only a few respondents (15%) stated that the pandemic is unlikely to change the operations of domestic tourism in the long-term/ after the COVID-19 pandemic has been brought under control, that is, there will be no impact and domestic tourism will revert to business as usual. The rest of the respondents indicated that the pandemic is likely to change the operations of domestic tourism in the long-term in relation to having stricter controls to ensure adherence to improved health practices in terms of hygiene (74.6%), use more online/ virtual platforms (35%) and change the type of business in (different from the tourism sector) (16.3%). The results suggest that health concerns will be here to stay, especially with travellers fearing another virus. Technological influences also emerge as a key consideration. Of concern is that some respondents perceive that some tourism businesses are likely to move out of the tourism sector, which is unsurprising given that the sector is one with the highest levels of disruptions.

Table 11: How the pandemic is likely to change the operations of domestic tourism in the long-term/ after the COVID-19 pandemic has been brought under control (n=406) (Multiple responses)

	Frequency	Percent
No impact – will go back to business as usual	61	15.0
Have stricter controls to ensure adherence to improved health practices in terms of hygiene	303	74.6
Change the type of business in (different from tourism sector)	66	16.3
Use online/ virtual platforms more	142	35.0

In relation to other responses, noteworthy aspects raised related to being 'aware of the value of domestic tourism, visitors and management', the need to 'focus more on increasing domestic tourism which benefits businesses at large'. Hesitancy to start tourism businesses was identified by a respondent and reinforces views that some businesses will exit the tourism sector is likely to have long-term impacts. A key issue was the increased reliance on technology and how this disadvantages businesses that cannot operate online. The importance of embracing technology was highlighted by one of the respondents who stated 'repurpose operations and adopt the use of technology'. A few respondents stated that businesses will close and not be able to recover. Transport preference for Uber was also indicated.

11.1.3. Strategies and responses to address COVID-19 disruptions to promote domestic tourism

Respondents were asked to indicate which specific strategies were being used by tourism service providers (including their own business/ organisation) in South Africa to deal with the COVID-19 disruptions and promote domestic tourism in South Africa. Multiple strategies were identified that were thematically grouped into employee changes (Table 12), business/ organisational adjustments (Table 13) and financial changes (Table 14). The main employee-related strategies identified were reduced employment time/ working hours (77.1%) and reduced salaries/ wages (72.9%). Other key employee changes were ending the employment of employees/ retrenchments (42.4%) and granting leave to employees/ furloughed staff (39.7%). Fewer respondents indicated upskilling or training self and employees (26.4%) and flexibility of work from home/ limiting physical contact among employees (24.1%). The low response in terms of flexibility to work from home is a result of most tourism-related activities and businesses being contact-based. A few respondents (7.6%) stated none. The impacts of the decreased demand for tourism goods and services are clearly evident in relation to employee alterations, especially ending employment, reducing time and reductions in salaries. The severe impacts of the pandemic that required major forms of adjustments are evident. Domestic tourism will be a key vehicle to increase demand and consumption, thereby reducing negative employment impacts.

Table 12: Employee changes (if business/ establishment has employees) to reduce costs, if staff employed, being used by tourism service providers (including own business/ organisation) in South Africa to deal with the COVID-19 disruptions and promote domestic tourism in South Africa (n=406) (Multiple responses)

	Frequency	Percent
None	31	7.6
Granting leave to employees/ furloughed staff	161	39.7
Ending the employment of employees/ retrenchments	172	42.4
Flexibility of work from home/ limiting physical contact among employees	98	24.1
Reduced employment time/ working hours	313	77.1
Reduced salaries/ wages	296	72.9
Upskilling or training self and employees	107	26.4

The main business/ organisational adjustments identified were ensuring health protocols were in place such as the provision of personal protective equipment (PPE), ensuring social distancing, sanitising and cleaning protocols, etc. (68.5%) and adjusting marketing strategies (such as lowering prices, special deals, targeting domestic tourism, etc.) (61.6%). Other strategies (with between 30% to 50% responses) were suspending tourism business activities not to incur costs (46.6%), starting or changing to new business/ organisational venture/s (34.7%) and changing refunding/ cancellation policies (30.8%). Less than 30% of the respondents stated moving domestic tourism activities (such as MICE) to online/ virtual platforms, refunding domestic tourism clients/ customers (24.1%), agreeing with domestic tourism clients/ customers to postpone (but not cancel) activities until a future date (23.9%), encouraging staycations (exploring destinations/ tourism sites where or close to where one is residing and/ or staying in accommodation establishments in city/ area where home is located) (22.7%), planning domestic tourism activities/ events that can be done at a later date after the crisis (20.4%), changing domestic tourism offering/ products/ services (19.2%) and introducing alternative domestic tourism services/ products (17.5%). Compliance with protocols emerges as a key response together with changing marketing strategies and engaging in activities to reduce costs (cost-cutting measures). New forms of external drivers on domestic tourism are also evident, including the use of online/ virtual platforms and encouraging staycations. While staycations are technically not considered to be tourism, it is playing a major role to ensure that tourism-related businesses are supported. The responses collectively reflect the responsiveness of tourism service providers.

Table 13: Business/ organisational adjustments being used by tourism service providers (including own business/ organisation) in South Africa to deal with the COVID-19 disruptions and promote domestic tourism in South Africa (n=406) (Multiple responses)

	Frequency	Percent
Starting or changing to new business/ organisational venture/s	141	34.7
Suspending tourism business activities not to incur costs	189	46.6
Refunding domestic tourism clients/ customers	98	24.1
Agreeing with domestic tourism clients/ customers to postpone (but not cancel) activities until a future date	97	23.9
Changing refunding/ cancellation policies	125	30.8
Planning domestic tourism activities/ events that can be done at a later date after the crisis	83	20.4

Adjusting marketing strategies (such as lowering prices, special deals, targeting domestic tourism, etc.)	250	61.6
Changing domestic tourism offering/ products/ services	78	19.2
Introducing alternative domestic tourism services/ products	71	17.5
Moving domestic tourism activities (such as Meetings, Incentives, Conventions and Exhibitions – MICE) to online/ virtual platforms	101	24.9
Encouraging staycations (exploring destinations/ tourism sites where or close to where one is residing and/ or staying in accommodation establishments in city/ area where home is located)	92	22.7
Ensuring health protocols in place such as provision of personal protective equipment (PPE), ensuring social distancing, sanitising and cleaning protocols, etc.	278	68.5

The main financial changes identified were using business reserves or savings (75.9%) and using personal (including support from family) reserves or saving (50.7%). Other financial changes included getting relief funding from government sources/ applying for government funding (34%), applying for a new loan, or an extension of a current loan (28.8%), asking landlords and service providers for reduced rates or waivers on payments (23.9%), applying for relief resources from non-government sources (20.4%), cancelling renovations, expansion, upgrades and/ or improvements (10.5%), seeking donations/ crowdfunding from the public (10.8%) and selling/ vacating business premises (8.1%). Again, the financial impacts are dire (although some financial sources from both government and non-government sources are noted). Domestic tourism will play a key role in ensuring income streams/ revenues are sustained that will assist tourism service providers considerably.

Table 14: Financial changes being used by tourism service providers (including own business/ organisation) in South Africa to deal with the COVID-19 disruptions and promote domestic tourism in South Africa (n=406) (Multiple responses)

	Frequency	Percent
None	31	7.6
Using business reserves or savings	308	75.9
Using personal (including support from family) reserves or savings	206	50.7
Applying for a new loan, or an extension of a current loan	117	28.8

Asking landlords and service providers for reduced rates or waivers on payments	97	23.9
Getting relief funding from government sources/ applying for government funding	138	34.0
Applying for relief resources from non-government sources	83	20.4
Seeking donations/ crowdfunding from the public	44	10.8
Cancelled renovations, expansion, upgrades and/ or improvements	79	19.5
Sell/ vacate business premises	33	8.1

Some of the respondents identified additional strategies used including shifting the focus of marketing services (for example, from weddings to funerals), advertising online to increase visibility, especially in the context of the increasing popularity of online usage associated with the COVID-19 pandemic. As one respondent stated, ‘advertising online has made sure people are able to see what we offer, by marketing the businesses mostly online especially on social media, updating the information apps for visitors to always be updated on what is happening in terms of the changes that the business is implementing for better travelling and following the COVID-19 regulations’. The importance of promoting tourism, especially domestic tourism was stressed. One suggestion forwarded was to have reduced entry fees to tourism areas and to have lower fees for locals. Another respondent stated that ‘during the pandemic more people encouraged domestic travelling on social media and they became travel influencers/ content travelling. This then helped increase the number of domestic travellers and encouraging more locals to support businesses’. Additional strategies identified were hosting virtual tours, borrowing money from private associates with no interest rate, specials for locals to use the accommodation, partnering with other businesses/ business collaboration, changing suppliers and making rooms available to locals in the service sector. One respondent also stated that shareholders should provide loans as ‘banks not interested in helping (reality of banks)’. Respondents also reinforced encouraging people to vaccinate and adhering to social distance protocols and mask wearing as key focus areas. The need to reduce fuel prices, electricity costs and water rates were also noted. The need not to discriminate against some businesses was stated by one of the respondents: ‘no relief or assistance is available to white owned businesses.

Government is openly discriminating against white businesses in the tourism sector'. One respondent stated that it is 'too risky to stay in tourism - investing in another business.

11.1.4. Perceptions of challenges and opportunities to reignite domestic tourism

Several challenges that tourism service providers face in the recovery of domestic tourism in South Africa were identified by the respondents, with many identifying multiple responses (Table 15). The main challenge identified were not having sufficient funding (83.3%) and the uncertainty associated with the pandemic (75.4%). The latter undermines conditions for recovery and to be able to predict the economic environment to establish demand for goods and services that tourism businesses can respond to. These challenges were followed by a lack of marketing opportunities (57.1%), lack of consumer confidence (57.1%) and not having the information to apply for funding/ seek relief (another economic challenge) (53%). The lack of consumer confidence denotes an unwillingness for the public to travel for tourism purposes. Reigniting domestic tourism will encourage travel. Challenges identified that had less than half responses were not having any or reliable internet access (45.3%), not qualifying for a loan or to extend current loan (4.1.%), safety and security concerns, especially in the context of recent social unrest (46.4%), not having suitable alternative premises (29.1%) and lack of suitable business premises/ spaces outside the home (25.6%). The results suggest that any tourism recovery strategy needs to address the multiple dimensional and interrelated challenges. For example, safety and security concerns have an impact on consumer confidence.

Table 15: Challenges do tourism service providers face in the recovery of domestic tourism in South Africa (n=406) (Multiple responses)

	Frequency	Percent
None/ no response	9	2.2
Do not have sufficient funding	338	83.3
Do not qualify for a loan or to extend current loan	168	41.4

Do not have the information to apply for funding/ seek relief	215	53.0
Do not have any or reliable internet access	184	45.3
Lack of marketing opportunities	268	66.0
Lack of consumer confidence	232	57.1
Lack of suitable business premises/ spaces outside the home	104	25.6
Do not have suitable alternative premises	118	29.1
The uncertainty of the pandemic	306	75.4
Safety and security concerns, especially in the context of recent social unrest	188	46.4

Two percent of the respondents forwarded other responses that potential domestic tourism does not have ‘loose money’ (discretionary or disposable income). One respondent stated that the government was not thinking of tourism businesses and the economy by extending the National State of Disaster. Another respondent indicated that no support was received from the government because business owners are White. There were also comments that government departments lacked imagination/ direction as well as skills and strategies. The impacts of the riots were also raised.

Tourism service providers were asked to identify opportunities in South Africa to encourage and support the recovery of domestic tourism (Table 16). Multiple opportunities were indicated with the most prominent ones being good quality tourism products, attractions and destinations across the country (70.4%), established tourism products (66.7%) and diverse tourism products, attractions and destinations across the country (64.3%). Other opportunities identified with more than 50% responses were domestic tourism packages/ deals/ incentives (54.2%) and a skilled and diverse workforce (53.2%). Opportunities with less than 30% responses were good transport infrastructure (29.8%) and portions of the population with disposable income (not financially negatively impacted by the pandemic) with a demand for leisure and recreational activities (29.6%). The low response for the latter correlates with concerns regarding consumer confidence discussed earlier. The results reveal the tourism service providers generally expressed positive perceptions about tourism offerings/ products and infrastructure to encourage and support the recovery of domestic tourism in South Africa.

Table 16: Opportunities to encourage and support the recovery of domestic tourism in South Africa (n=406) (Multiple responses)

	Frequency	Percent
None/ no response	15	3.7
Established tourism products	271	66.7
Diverse tourism products, attractions and destinations across the country	261	64.3
Good quality tourism products, attractions and destinations across the country	286	70.4
Domestic tourism packages/ deals/ incentives	220	54.2
Skilled and diverse workforce	216	53.2
Good transport infrastructure	121	29.8
Portions of the population with disposable income (not financially negatively impacted by the pandemic) with a demand for leisure and recreational activities	120	29.6

Other comments forwarded by six respondents included providing platforms to market the business, the need for government to create funding mechanisms and vaccinate the population. The need for financial support was again noted. Two respondents were pragmatic, stating ‘some can recover while others cannot’ and ‘domestic tourism will not save the industry. It is not big enough to absorb the amount of service providers that the industry needs to be supported and that there is not a large enough middle and wealthy class in South Africa’.

11.1.5. Support and recovery to reignite domestic tourism

Tourism service providers were asked if they were aware of programmes/ interventions to encourage/ promote domestic tourism recovery in South Africa. The majority (85.5%) were not while 14.5% were (Table 17). Among those who were, the main types of programmes they identified were the COVID-19 Unemployment Insurance Fund (UIF) Temporary-Employee Relief Scheme (TERS), provincial programmes and social grants in relation to financial support. Non-financial programmes identified were targeted marketing to promote domestic tourism (specifically South African Tourism Sho’t Left campaigns were identified) and specials/ packages/ incentives/ getaway vouchers for domestic tourism.

Table 17: If aware of programmes/ interventions to encourage/ promote domestic tourism recovery in South Africa (n=406)

	Frequency	Percent
No	347	85.5
Yes	59	14.5

Slightly more than a third of the respondents (38.7%) indicated that their organisation/ business (as a tourism service provider) benefitted from any form of support to deal with COVID-19 pandemic-related impacts, while the majority (61.3%) did not (Figure 9). This response reveals that while almost all tourism service providers interviewed had experienced some form of disruption from the start of the pandemic, most did not receive external support.

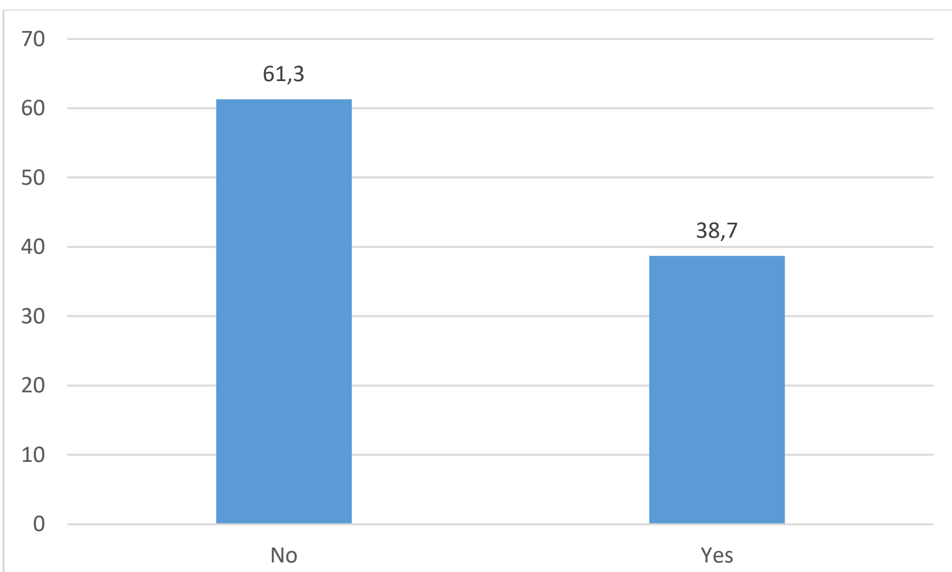


Figure 9: If organisation/ business (as a tourism service provider) benefitted from any form of support to deal with COVID-19 pandemic related impacts (n=406, in %)

Among those who did receive support, multiple organisations/ institutions that provided the support were identified (Table 18). The results clearly show the dominance of public sector support with other national government departments (28.1%) and the Department of Tourism (national) (7.9%) being the main sources of support. Other organisations/ institutions identified by less than 3% of the respondents were provincial and local government departments as well as non-governmental organisations/ institutions including tourism organisations, banks/ financial institutions, the private sector (both tourism and non-tourism businesses), philanthropic organisations (religious bodies, charitable organisations, etc.) and the general public via donations/ crowdfunding. This over-reliance on public sector support is not sustainable given that South Africa experiences funding limitations (primarily linked to a low tax base) and that funding has been prioritised to deal with the pandemic health impacts and support is geared to assist the poorest and most vulnerable in society.

Table 18: If yes, organisations/ institutions that provided the support (n=406) (Multiple responses)

	Frequency	Percent
Not applicable	249	61.3
No response	6	1.5
Department of Tourism (national)	32	7.9
Other national government departments	114	28.1
Provincial government departments	10	2.5
Local government departments	5	1.2
Tourism organisations	8	2.0
Banks/ financial institutions	11	2.7
Private sector (tourism businesses)	6	1.5
Private sector (not tourism businesses)	4	1.0
Philanthropic organisations (religious bodies, charitable organisations, etc.)	4	1.0
The general public via donations/ crowdfunding	6	1.5

Table 19 indicates the type of support/ relief that the organisation/ business that received support benefited from/ were able to access. A third of the respondents (33.5%), which was almost all the respondents who indicated that support was received, stated UIF TERS. This was followed by COVID-19 Tourism Relief Fund for small, medium and micro enterprises (SMMEs) (6.9%). Other types of support identified were banks, grants loans, donations from the public and training support. The responses correlate with the dominance of government support.

Table 19: If yes, type of support/ relief fund did the organisation/ business benefit from/ were able to access (n=406) (Multiple responses)

	Frequency	Percent
Not applicable	249	61.3
No response	3	.7
COVID-19 Unemployment Insurance Fund (UIF) Temporary-Employee Relief Scheme (TERS)	136	33.5
COVID-19 Tourism Relief Fund for SMMEs	28	6.9
Training support	6	1.5
Three month tour guide payments of R1500 per month	1	.2
Bank	1	.2
CTO Annual Funding increased by 100%	1	.2
Donations from the public	2	.5
FNB Relief	1	.2
Grant	1	.2
Grant from province	1	.2
Loan	1	.2

Among the respondents who received support, 23.9% (the majority of the 38.7%) indicated that the support provided was adequate/ helpful to encourage/ promote domestic tourism, with 13.5% stating that it was not and 1.2% did not respond (Table 20). The support provided for some of the tourism providers assisted to encourage/ promote domestic tourism.

Table 20: If support provided to date has been adequate/ helpful to encourage/ promote domestic tourism (n=406)

	Frequency	Percent
Not applicable	249	61.3

No response	5	1.2
No	55	13.5
Yes	97	23.9

The respondents who stated that support was inadequate forwarded several reasons to justify this position. These were mainly related to the funds provided being insufficient/ inadequate funds to poor communities being neglected. Additionally, it was noted that most businesses have not returned to normal, a sentiment reinforced by earlier findings in this study. This was further expanded on by some of the respondents who stated that businesses ‘cannot keep up with the everlasting pandemic and they cannot cover revenue losses’ and ‘it is not enough to outlast this pandemic’. The short period of support against the continued pandemic was reinforced by other respondents as well. One respondent also stated that the pandemic impacts remain and that businesses continue to experience job losses. The support was in some instances insufficient to cover operational costs. Also, one respondent stated that ‘the relief fund was able to help employees but it was not enough to maintain the workforce and to prevent retrenchments’. One of the respondents who received a loan stated: ‘it did not save jobs, it just caused more debt since they have to pay back this money at a later stage’.

The importance of promoting tourism was alluded to by one of the respondents who stated that as long as people do not travel and are fearful of getting sick (despite domestic tourism marketing), businesses will remain in trouble. The impacts of technological changes on travel behaviour were also noted with one respondent stating ‘virtual platforms are still more popular than on-site gatherings’. Some companies not qualifying or being excluded was also stated, with one respondent stating: ‘The reality was that COVID did not discriminate according to race hence the help should have been to every registered tourism entity’. Administrative issues were also identified in relation to ‘lengthy processes that waste time’ and delayed payments. One respondent also stated that ‘the Department of Tourism misappropriated millions as ‘seen in the news and uncovered by forensic auditors’ and, therefore, it was not surprising that so few tourism businesses received financial support.

Among the respondents who stated that they did not receive support, Table 21 shows that the main reasons identified were not being aware that support was available (25.9%) and applied/ tried to access support, but was not successful (20.7%). A few of the respondents stated that they did not need support (7.1%) or did not qualify (3.2%). The reasons indicate that most needed assistance but were not able to access any support.

Table 21: If organisation/ business (as a tourism service provider) did not benefit from any form of support to deal with COVID-19 pandemic related impacts, why not (n=406) (Multiple responses)

	Frequency	Percent
Not applicable	157	38.7
No response	13	3.2
Did/ do not need support	29	7.1
Was not aware that support was available	105	25.9
Applied/ tried to access support, but was not successful	84	20.7
Did not qualify	13	3.2
Business closed down/ not operational	3	.7
Business just opened a year ago	1	.2
Complicated process to apply	1	.2
Too politicised/ do not trust government	2	.5

Almost all the respondents (97.4%) identified different ways in which they would like to be informed about assistance and incentives being provided to tourism services providers and/ or domestic tourism products owners (Table 22). This suggests that there is a need for information. The main ways that respondents preferred information to be communicated to them were directly/ should be part of a national database (60.8%), social media platforms (62.6%) and the internet (54.2%). Other key ways of receiving information were television (48.3%), tourism service provider organisations (30%), radio (36.2%) and newspapers (25.9%). The importance of direct communication and the use of technology for communication purposes emerges. However, as cautioned in the literature review, internet connectivity is a major problem in South Africa and many small businesses (especially micro and informal enterprises) will likely to disadvantaged. Thus, multiple ways of communicating with tourism service providers should be fostered. One respondent provided additional information and stated ‘Not interested - will not reopen tourism business. Too risky and unpredictable’.

Table 22: How would like to be informed about assistance and incentives being provided to tourism services providers and/ or domestic tourism products owners (n=406) (Multiple responses)

	Frequency	Percent
No response	9	2.2
Not interested	2	.4
Television	196	48.3
Radio	147	36.2
Social media platforms	254	62.6
The internet	220	54.2
Newspapers	105	25.9
Magazines/ brochures	56	13.8
Tourism service provider organisations	122	30.0
Directly/ should be part of a national database	247	60.8
Don't need information as a trainer but can include during training	1	.2
Posters and billboards on streets	1	.2
Word-of-mouth	1	.2

Respondents identified a range of different types/ kinds of support/ interventions that would be useful to the business and the domestic tourism sector more generally to recover from the COVID-19 pandemic impacts in South Africa (Table 23). The multiple responses reveal that a variety of interventions are advocated, denoting the need for a multi-pronged approach to deal with the pandemic. Unsurprisingly, from a tourism service provider perspective and given earlier responses in relation to the prominence of financial issues, the main type of support identified by the majority of the respondents (84.2%) was financial support (such as grants, loans, bridging support, etc.) to tourism businesses/ service providers. This was followed by the population to be vaccinated (64%), which indicates that tourism service providers recognise that the quicker the pandemic is brought under control from a health point of view, the more likely that tourism will be on a pathway to recovery.

Fifty to 60% of the respondents identified the following types of support/ interventions:

- Reopening/ resumption of travel (58.4%)
- Deferral of tourism service provider payments (mortgage, taxes, rent, loans, Unemployment Insurance Fund employee contributions, etc.) (57.6%)
- Better marketing of tourism products/ inform residents of options to promote domestic tourism (55.4%)
- Developing a national marketing and communication strategy to promote domestic tourism (55.2%)
- Improved safety and security measures (53.7%)
- Compliance with health safety protocols (53.2%)

Forty to 50% of the respondents identified the following types of support/ interventions:

- Attractions, entertainment, leisure and recreational facilities to be fully operational and open (47.5%)
- Advice/ training on business recovery and strategy for tourism businesses negatively impacted upon by the pandemic (47%)
- Advice/ training on effective marketing strategies (especially those to attract domestic tourists) to tourism businesses and marketing agencies (45.6%)
- Being competitive internationally to attract tourists (41.9%)

Less than 40% of the respondents identified the following types of support/ interventions:

- Provide domestic tourism packages/ incentives (38.4%)
- Profile domestic tourism destinations/ products/ sites on media platforms (34.5%)
- Creating platforms/ forums/ networks to share best practices from other tourism businesses/ service (33.5%)
- Advice/ training on innovation/ technology development/ advancements to support domestic tourism providers (36.5%)
- Improve the quality of existing tourism products/ attractions (31.3%)
- Online/ virtual ‘tours’ to showcase domestic tourism destinations/ products/ sites (25.9%)
- Develop more tourism products/ attractions targeting domestic tourists (25.1%)

The responses reveal that support is needed in relation to financial aspects, dealing with health issues, training, and marketing and destination profiling to increase consumption.

Table 23: Types/ kinds of support/ interventions that would be useful to the business and the domestic tourism sector more generally to recover from the COVID-19 pandemic impacts in South Africa (n=406) (Multiple responses)

	Frequency	Percent
None	16	3.9
Financial support (such as grants, loans, bridging support, etc.) to tourism businesses/ service providers	342	84.2
Deferral of tourism service provider payments (mortgage, taxes, rent, loans, Unemployment Insurance Fund employee contributions, etc.)	234	57.6
Advice/ training on business recovery and strategy for tourism businesses negatively impacted upon by the pandemic	191	47.0
Advice/ training on effective marketing strategies (especially those to attract domestic tourists) to tourism businesses and marketing agencies	185	45.6
Advice/ training on innovation/ technology development/ advancements to support domestic tourism	148	36.5
Developing a national marketing and communication strategy to promote domestic tourism	224	55.2
Creating platforms/ forums/ networks to share best practices from other tourism businesses/ service providers	136	33.5
Provide domestic tourism packages/ incentives	156	38.4
Develop more tourism products/ attractions targeting domestic tourists	102	25.1
Improve the quality of existing tourism products/ attractions	127	31.3
Better marketing of tourism products/ inform residents of options to promote domestic tourism	225	55.4
Profile domestic tourism destinations/ products/ sites on media platforms	140	34.5
Online/ virtual ‘tours’ to showcase domestic tourism destinations/ products/ sites	118	29.1
Offer advise/ training programmes to tourism service providers	105	25.9
Reopening/ resumption of travel	237	58.4

Attractions, entertainment, leisure and recreational facilities to be fully operational and open	193	47.5
Improved safety and security measures	218	53.7
Compliance with health safety protocols	216	53.2
Population to be vaccinated	260	64.0
Being competitive internationally to attract tourists	170	41.9

Other responses forwarded by a few respondents related mainly to access to mental health support and dealing with stress, ensuring that tourism businesses are permitted to operate (limit restrictions and 'end the national state of disaster in South Africa'), build a strong sustainable tourism economy, collaboration and networking and relationships with key stakeholders, reducing prices of tourism products as a marketing strategy to gain more customers and attracts tourists, supporting legislative issues and regulations around COVID-19 restrictions to reduce the negative impact on the sector (one respondent specifically stated that restaurants should not be targeted), improvement in public transportation and making airlines more accessible with lower price points, improved and targeted (especially focusing on black consumers and new offerings/ services) marketing, assisting tourism businesses with marketing strategies, partnering with other sectors where possible to promote tourism, make it illegal for companies to hold tourism companies liable for contracts signed prior to COVID (for example, 'mobile phone companies should not be allowed to expect a tour operator to keep paying a contract that they are contracted into for two years when there is currently no money coming in due to COVID') and receiving incentives for maintaining good hygiene in places of businesses. One respondent also noted the need for additional research have a more in-depth understanding of how different businesses have been affected rather than generalising. The need to end of COVID 19 pandemic was reiterated as being critical for tourism. Financial support/ funding was repeated as other responses, denoting that this is a key need.

Broader societal issues were also identified with include addressing the plight of unemployed young people (with one respondent stating: 'Have more graduation internships available for unemployed graduates', improvement in minimum wage requirements, dealing with energy (including fuel) costs and disruptions and transitioning to more sustainable practices (including subsidising renewable energy). The need to support and not discriminate against foreign-owned businesses was also raised. A key issue raised by several respondents was to stop the riots and violent civil unrest which are deemed to be bad for the reputation of South Africa and undermine efforts to promote tourism.

Respondents were asked to rate the extent to which they agree with statements regarding how South Africa’s domestic tourism sector can be better positioned to deal with future disruptions (including climate change) to transition to a more resilient and sustainable sector (Table 24). This was viewed as an important component since, as indicated in the literature, disruptions will be a feature of modern society and any recovery strategy needs to consider sustainability aspects to ‘disruption-proof’ the sector, that is, assist the tourism sector to respond and cope with disruptions and mitigate negative impacts. There was generally support among most tourism service providers for the domestic tourism sector embracing sustainable practices. Specifically, the following statements were supported (combination of agreed and strongly agreed) by more than 80% of respondents:

- Use local service providers (90.1%)
- Use of local products (90.1%)
- Use local labour (86%)
- Having a tourism disaster management fund that can be more easily accessed (84.4%)
- Conserving energy (for example, transitioning to renewable energy sources such as solar energy, use of energy conserving lights and appliances, etc.) (81.6%)
- Proper disposal of waste (including recycling and composting) (81%)
- Promoting green behavioural change/ information on environmentally-friendly behaviour (80%)

Sixty to 80% of the respondents supported the following statements:

- Conserving water in tourism establishments (for example, reuse of towels and use of greywater) (79.1%)

- Support/ contribute to carbon offsetting projects/ greening programmes (72.9%)
- Regular health screenings for employees and guests/ customers (71.6%)
- Develop site/ organisational disaster management plans (71.2%)
- Purchase green/ fair trade products (69.7%)
- Diversify domestic tourism products (69.2%)

The high levels of support to embrace sustainable practices needs a framework to enable transitioning from intent to practice. The lowest support was for the statement 'permit staff/ employees to work from home, where feasible/ practical' (40.3%), reinforcing sentiments in the literature that it is difficult for many businesses and functions in the tourism sector to transition to working from home, which has become a feature in a COVID-19 world.

Table 24: Extent to which agree or disagree with statements regarding how South Africa's domestic tourism sector can be better positioned to deal with future disruptions (including climate change) to transition to a more resilient and sustainable sector (DK – Don't know, 1 = strongly disagree, 2 = disagree, 3 = neutral/ unsure/ don't know, 4 = agree and 5 – strongly agree) (n=406, in %)

	DK	1	2	3	4	5
Diversify domestic tourism products	2.2	3.2	3.7	21.7	49.5	19.7
Use local labour	.5	2.2	3.2	8.1	56.7	29.3
Permit staff/ employees to work from home, where feasible/ practical	10.1	3.4	19.2	26.8	30.0	10.3

Use local service providers	1.0	2.0	1.2	5.7	60.1	30.0
Use of local products	1.7	2.2	1.5	4.4	58.1	32.0
Purchase green/ fair trade products	12.6	1.5	1.7	14.5	46.1	23.6
Conserving water in tourism establishments (for example, reuse of towels and use of greywater)	5.4	1.7	2.7	11.1	54.2	24.9
Conserving energy (for example, transitioning to renewable energy sources such as solar energy, use of energy conserving lights and appliances, etc.)	3.7	2.0	1.7	11.1	52.0	29.6
Proper disposal of waste (including recycling and composting)	4.9	1.7	1.0	11.3	54.2	26.8
Promoting green behavioural change/ information on environmentally-friendly behaviour	5.7	1.7	1.2	11.3	53.2	26.8
Having a tourism disaster management fund that can be more easily accessed	6.2	2.5	.7	6.2	42.6	41.9
Regular health screenings for employees and guests/ customers	4.4	2.0	8.1	13.8	41.6	30.0
Develop site/ organisational disaster management plans	13.8	2.5	1.2	11.3	42.1	29.1
Support/ contribute to carbon offsetting projects/ greening programmes	11.6	2.5	1.5	11.6	49.0	23.9

Other suggestions that can assist the domestic tourism sector to become more resilient/ capable in dealing with future disruptions such as pandemics, social unrest and climate-related disasters identified by the respondents were linked to the need for a committed government reserve/ fund to support tourism and the private sector to also allocate a budget or loans to assist. Better insurance cover for unforeseen situations was also identified by one of the respondents. One respondent also stated: ‘offer free/affordable financial literacy workshops that can be accessed by all entrepreneurs and educate us on all saving plans/ investment options available to us from various financial institutions’.

The need to create a support network resonates with earlier findings that support creating platforms/ forums/ networks for tourism businesses/ service providers. It was also reiterated that government needs to limit disruptions and restrictions so that businesses can remain open. The need to focus on health protocols resonates with earlier findings. Providing assistance to tourism businesses and other service providers that have closed down to support them to re-open was also noted by one of the respondents. The need to create employment was also stated. The need for a local focus was emphasised by one of the respondents who identified the need for local domestic management and control of local domestic products that are currently run by foreign interests. Companies should be more flexible with technology was also indicated in the context of the prominence of the digital age. Linked to this was the need to 'create online platforms to keep sharing ideas on how we can sustain our country'. One respondent suggested providing businesses with backup solar systems because it has a negative impact on establishments resulting in customers being affected as well.

The importance of domestic tourism was noted by some of the respondents who stated 'promote domestic tourism', 'better marketing like increasing Sho't left ads' and 'have free conferences or programs for the youth to get to know their country more and use local destinations for their vacations'. One respondent stated the government should 'take care of people before the environment', echoing tensions in society in relation to promoting sustainability aspects.

One respondent aptly highlighted the importance of increasing preparedness: 'analyse risks related to climate change and other crises and inform members of the tourism sector of the likelihood of a certain risk transpiring so contingency plans can be developed ahead of time'. Another respondent stated: 'since businesses have experienced how disastrous the pandemic has been, they need to have proper planning for future unforeseen circumstances'.

The need for disaster management plans was stated (from national to business levels), together with formal means of communicating on disruptions and responses. One respondent specifically stated that 'the tourism department must make sure that they have a plan as to how they will assist businesses not only financially but make sure that even their premises or infrastructure is in a good state'. Additionally, one respondent indicated the need to provide support and information to tour guides because they are the most vulnerable when it comes to social unrest and pandemics. To have management plans not only for the sector but also for employees and tourists. Having an online strategy, that is, a website or page that is active to keep tourists updated was also suggested by one of the respondents. The broad and all-encompassing impacts of disruption were encapsulated by the sentiments of one of the respondents: 'everyone needs to play a role, be prepared for anything that might attack us in the near future for anything is possible these days'.

A word cloud (Figure 10) below was generated to depict responses in relation to what national government should specifically be focusing on to assist the domestic tourism sector to recover. The issues raised reflect earlier aspects raised, specifically the need to encourage tourism and travel, supporting businesses (especially financially) and marketing.

Figure 10: Word cloud depicting tourism service providers' keywords in relation to national government focus to assist domestic tourism to recover

11.2. Public survey travel behaviour responses

11.2.1. Demographic profile of respondent

In terms of the residential status in South Africa, almost all respondents were South African citizens (95.1%) (Figure 11). A few respondents were South African permanent residents (3.5%) and foreign nationals (1.3%). Two interviewees did not respond. The online invitation to participate in the study stated that the survey targeted persons residing in South Africa and the face-to-face interviews were undertaken at selected South African locations since the focus was on domestic tourism. Thus, the results are not surprising and reflect the profile of South African residents.

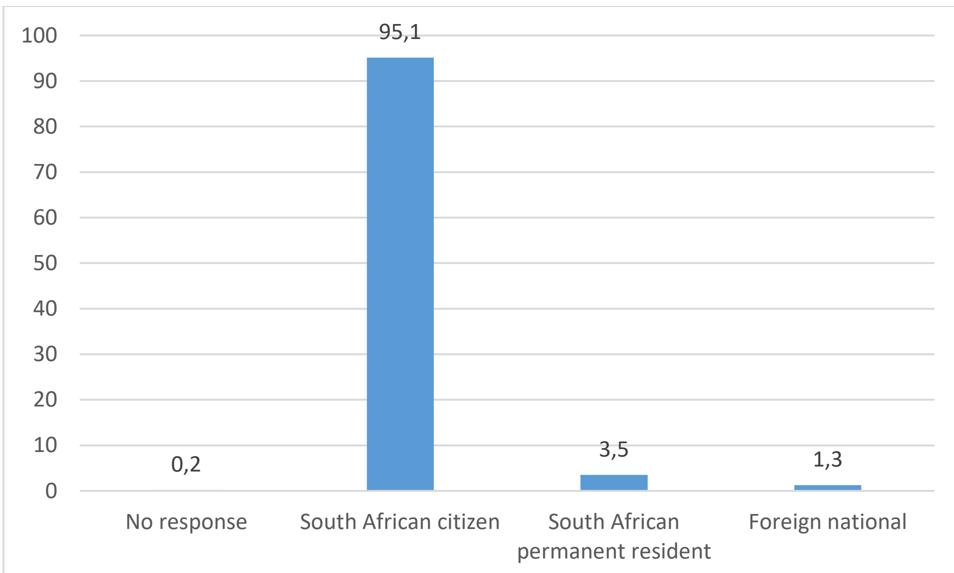


Figure 11: Residential status in South Africa (n=1034, in %)

In relation to the population group of the respondents, Table 25 shows that 33.8% indicated Black African followed by Indian/ Asian (25.8%), Coloured (19.1%) and White (18.3%). While not proportionate to the profile of South African residents, the results indicate that the study includes perspectives from different population groups. Furthermore, the results reflect the locational bias in the study with respondents being mainly from Gauteng, KwaZulu-Natal and the Western Cape (discussed next). This could also be linked to the methodological approach adopted in terms of an online survey.

Table 25: If a South African citizen, population group (n=1034)

	Frequency	Percent
Do not want to disclose/ not applicable	31	3.0
Black African	350	33.8
Coloured	197	19.1
Indian/ Asian	267	25.8
White	189	18.3

Most of the respondents were between the ages of 21 and 40 years (62.3%: 32.5% between 21-30 years and 29.8% between 31-40 years) as indicated in the Table below. Other key age categories were 41-50 years (14.5%), 51-60 years (9.2%) and 18-20 years (5.9%). A few respondents (2.7%) were more than 70 years old and three did not respond.

Table 26: Age category (in years) at last birthday (n=1034)

	Frequency	Percent
No response	3	.3
18-20	61	5.9
21-30	336	32.5
31-40	308	29.8
41-50	150	14.5
51-60	95	9.2
61-70	53	5.1
> 70	28	2.7

The Table below indicates that the majority of the respondents were females (53.9%) and 43.9% were males. A few respondents (2.3%) did not want to disclose their gender and a further four respondents stated other.

Table 27: Gender of respondent (n=1034)

	Frequency	Percent
Do not want to disclose	24	2.3
Female	552	53.4
Male	454	43.9
Other	4	.4

In terms of the marital status of the respondents, Table 28 shows most respondents were married (31%), not currently in a relationship/ single (25%), in a relationship but not living together (20.5%) or in a relationship and living together (13.4%). Lower proportions of respondents stated divorced/ separated (4.9%) or widowed (4.6%). One respondent stated dating and another four did not disclose their marital status. The marital status data reflects the youthful population of the respondents as per the age profile presented earlier.

Table 28: Marital status of respondent

	Frequency	Percent
No response	4	.4
Not currently in a relationship/ single	258	25.0
In a relationship and living together	139	13.4
In a relationship but not living together	212	20.5
Married	321	31.0
Divorced/ separated	51	4.9
Widowed	48	4.6
Dating	1	.1

Table 29 indicates that almost all of the respondents had completed secondary schooling (98.4% in total). Among this group, the majority had some level of post-schooling qualifications: technical/ vocational training (6.5%), certificate/ diploma (20.5%), undergraduate degree (28.5%) and postgraduate degree (20.7%). The rest of the respondents had completed primary (7 years) schooling) (1.9%) or having no formal education (3.1%). Three interviewees did not respond. The results show that most respondents who participated in the survey had post-secondary schooling qualifications that do not reflect the South African population educational profile (attributed to the methodological approach) adopted. However, the higher qualifications among the respondents are important when examining domestic tourism intentions since these groups are more likely to travel for tourism purposes.

Table 29: Highest level of education attained

	Frequency	Percent
No response	3	.3
No formal education	32	3.1
Primary completed (7 years of schooling)	20	1.9
Secondary completed (12 years of schooling -	191	18.5

matriculated)		
Technical/ vocational training	67	6.5
Certificate/ diploma	212	20.5
Undergraduate degree	295	28.5
Postgraduate degree	214	20.7

The educational qualification profiles also align with the employment status of the respondents and reveals that unlike the South African population generally, the respondents were mostly employed on a full-time basis (51.5%), employed on a part-time basis/ in the informal sector (non-fixed salary per month) (11.2%) or self-employed (11.8%) (Table 30). Among the rest of the respondents, they were students/ scholars (8.5%), involved in home duties (5.2%) or retired (5.1%). Only 6.2% were unemployed. Three respondents stated internships/ learnerships and one did not disclose their current employment status.

Table 30: Employment status

	Frequency	Percent
No response	1	.1
Unemployed	64	6.2
Employed – full-time (fixed salary per month)	533	51.5
Employed – part-time/ informal sector (non-fixed salary per month)	116	11.2
Self-employed	122	11.8
Student/ scholar	88	8.5
Retired	53	5.1
Homemaker/ home duties	54	5.2
Internship/ learnership	3	.3

Table 31 indicates that 6.2% of the respondents did not earn a monthly income while 33.9% did not respond or indicated that they viewed this information as confidential. Among the rest, 8.8% earned less than R5 000 per month, 10.3% earned between R5 000 and less than R10 000, 13.9% earned between R10 000 and less than R20 000, 11.4% earned between R20 000 and less than R30 000, 8.4% earned between R30 000 and less than R40 000, 4.1% earned between R40 000 and less than R50 000 and 3% earned R50 000 or more. The results show that respondents were from various income groups, with higher income levels being more noticeable, aligned with the educational and employment status of the respondents discussed earlier.

Table 31: Monthly net income in Rands (after deduction of taxes) in the range provided

	Frequency	Percent
Declined to answer/ Confidential	351	33.9
None	64	6.2
Less than R5 000	91	8.8
R5 000 to less than R10 000	106	10.3
R10 000 to less than R20 000	144	13.9
R20 000 to less than R30 000	118	11.4
R30 000 to less than R40 000	87	8.4
R40 000 to less than R50 000	42	4.1
R50 000 or more	31	3.0

Table 32 shows the provinces of the respondents' permanent place of residence in South Africa in relation to types of area. The dominance of specific provinces and town/ urban areas reflect the methodological approach adopted since online surveys rely on internet connectivity and the face-to-face interviews were concentrated in Gauteng (Johannesburg), KwaZulu-Natal (Durban) and the Western Cape (Cape Town). While the responses are not proportionate to the population distribution in South Africa, as noted earlier and in relation to the tourism service provider surveys as well, the diversity in relation to the profiles of the respondents in relation to population groups, age, gender, marital status, educational level, employment, income and national spread permit trends analyses to be undertaken.

Table 32: Province of permanent place of residence in South Africa in relation to type of area (n=1034)

	Town/ urban area (not township)	Township	Rural
Eastern Cape	7.3	.3	.2
Free State	3.5	.6	-
Gauteng	29.5	6.6	.4

KwaZulu-Natal	23.6	2.5	1.4
Limpopo	.2	.2	.3
Mpumalanga	2.8	.3	.3
Northern Cape	2.1	.4	.1
North West	.4	-	.2
Western Cape	16.5	.4	.2

In terms of the province of the respondents' place of residence, Figure 12 indicates that most were in Gauteng (36.5%), KwaZulu-Natal (27.5%) and the Western Cape (17.1%) where data collection was concentrated, as explained earlier. These provinces are also the main domestic tourism destinations in South Africa and were targeted for face-to-face interviews.

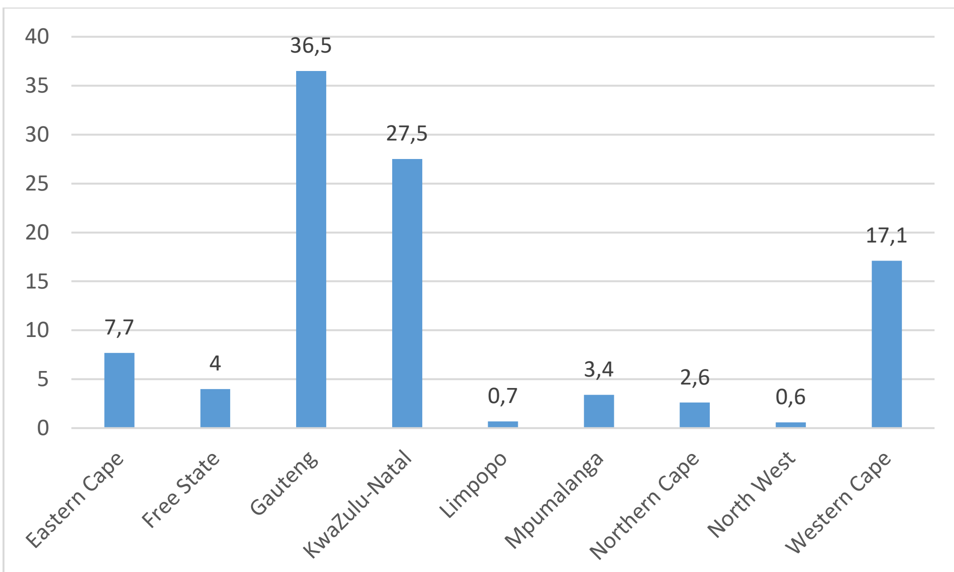


Figure 12: Province of permanent place of residence in South Africa (n=1034, in %)

Table 33 indicates that most of the respondents' permanent places of residence were located in urban centres or towns (85.8%) followed by townships (11.2%). The lowest proportion of interviews (3%) were in rural areas. This reflects the urban dominance of population concentration in South Africa and the methodological approach adopted.

Table 33: Type of area of permanent place of residence in South Africa (n=1034)

	Frequency	Percent
Urban/ town	887	85.8
Rural	31	3.0
Township	116	11.2

Household size and type are important to consider when examining the target markets for domestic tourism. The results earlier, in relation to marital status, suggested the prominence of different types of family living. This is evident in relation to household size as well (Table 34), with only 12.5% of the respondents living by themselves. Most respondents (78.6%) indicated that their household size was between 2 and 5 persons (specifically 21.5% each for 1 and 2 persons, 23% for 4 persons and 12.6% for 5 persons). The results suggest more nuclear family configurations.

Table 34: Household size (number of persons in the home living and eating together)

	Frequency	Percent
No response	3	.3
Live alone (1)	129	12.5
2	222	21.5
3	222	21.5
4	238	23.0
5	130	12.6
6	62	6.0
7	15	1.5
8	8	.8
10	2	.2
> 10	3	.3

Figure 13 shows that close to a third of the respondents (32.2%) indicated that the COVID-19 pandemic personally affected their financial status while close to two thirds (65.7%) did not. A few (2%) did not respond. The results suggest that financially, there is likely to be an appetite to engage in domestic travel among those who were not personally affected by the pandemic.

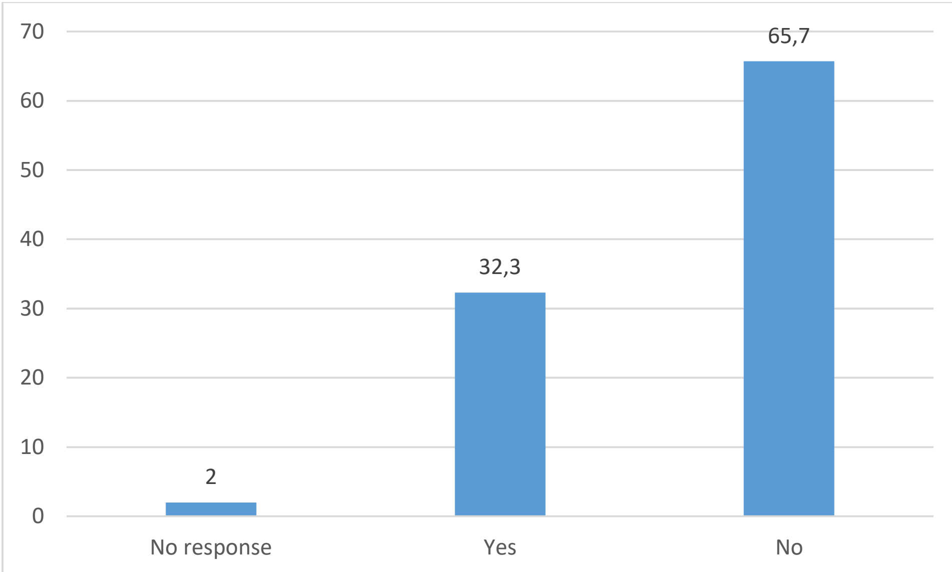


Figure 13: If the COVID-19 pandemic personally affected financial status (n=1034, in %)

Among those who provided responses to detail how the COVID-19 pandemic personally affected their financial status (Table 35), most indicated lower wages (change in employment conditions) (21.2%) and lost job/ income (10%). The respondents who experienced negative impacts were likely to have limited access to financial resources to travel.

Table 35: If COVID-19 pandemic personally affected financial status, how impacted (Multiple responses)

	Frequency	Percent
Not applicable/ no response	706	68.3
Lost job/ income	103	10.0
Lower wages (change in employment conditions)	219	21.2
Increase in expenses/ rising prices	7	.7
Death in the family due to COVID-19 led to more responsibilities	1	.1
Decreased opportunity for consultancy projects	1	.1
Got a job	1	.1
Got extra money	1	.1
Hard to find a job	1	.1
Helped me to stop eating out a lot	1	.1
Investment growth affected	1	.1

11.2.2. Past, current and future (post-covid-19) domestic tourism travel patterns

Close to half of the respondents (52.8%) indicated that they personally had a domestic (in South Africa) trip affected by the COVID-19 pandemic (Table 36), reinforcing the sentiments experienced in the literature and the tourism service providers interviewed that the pandemic has substantial disruptions on travel. These respondents had trips cancelled (28%) or had trips postponed (24.8%). Almost equal proportions of respondents stated that they did not have trips planned (25.6%) or that their planned trip continued uninterrupted (28.7%). The severity of the disruptions of previous trips can influence willingness to travel in the future, especially if pandemic travel disruptions (such as limiting travel and the cancellations of flights) continue.

Table 36: If personally had a domestic (in South Africa) trip affected by the COVID-19 pandemic (n=1034) (Multiple responses)

	Frequency	Percent
Not applicable/ no trips	265	25.6
Yes, trip cancelled	290	28.0
Yes, trip postponed	256	24.8
No, planned trip continued uninterrupted	297	28.7

Table 37 indicates the reason/s why the trip was cancelled. The main reasons forwarded to travel disruptions include travel restrictions imposed by South Africa (29.4%) and travel restrictions imposed by other countries (15.7%). Relatedly, 10% of the respondents indicated airline cancelled flights or other forms of transportation cancelled. The in-country restrictions have more responses because more people travel domestically than internationally currently. Fear also contributed to travel disruptions with 20.2%of the respondents indicating fear to contract COVID-19 virus during travel and fear of not being able to return (11.9%). Other responses related to disruptions associated with events/ activities/ establishments, financial problems and illness.

Table 37: If the trip was affected, reason/s (n=1034) (Multiple responses)

	Frequency	Percent
Not applicable/ no response	562	54.4
Travel restrictions imposed by South Africa	304	29.4
Travel restrictions imposed by other countries	162	15.7
Fear that will not be able to return	123	11.9
Fear to contract COVID-19 virus during travel	209	20.2
Airline cancelled flights or other forms of transportation cancelled	103	10.0
Cancellation or postponement of event/ activity	113	10.9
Temporary closure of tourism establishment	43	4.2
Unsure of COVID-19 protocols at destination/ establishment	39	3.8
Fear of misinformation about travel and destinations rules	1	.1
Financial problems	2	.2
Sickness/ death of a family member	2	.2
Worked in the army and called to duty therefore trips were cancelled.	1	.1
Organisers made conference virtual to prevent spread of COVID-19	1	.1

While only 9.6% stated that they did not travel domestically for tourism/ leisure purposes (staying overnight away from the area where home is located) before the COVID-19 pandemic on an annual basis, 31.5% indicated that they did not travel since the COVID-19 pandemic started in March 2020 (Table 38). Again, the impact of the pandemic on domestic travel is clearly evident. Additionally, more respondents travelled more than 3 times a year before the pandemic started (38%) than after March 2020 (10.8%). The results reveal that a significant proportion of respondents have travelled domestically before the pandemic, denoting a demand for domestic tourism that needs to be reignited. This indicates that domestic mobility was widespread in South Africa.

Table 38: How often travelled domestically (within South Africa) for tourism/ leisure purposes (staying overnight away from the area where home is located) before the COVID-19 pandemic on an annual basis and since the COVID-19 pandemic started in March 2020 (n=1034)

	Before COVID-19 pandemic (number of trips per year)	Since the COVID-19 pandemic started (number of trips per year)
None	9.6	31.5
1	20.8	29.0
2	15.7	18.6
3	16.1	10.2
4	11.4	5.7
5	9.4	2.7
6	5.7	1.1
7	2.5	.6
8	4.1	.5
9	1.1	-
10	.5	.1
More than 10	3.3	.1

Respondents were asked how they intend to change domestic and international travel plans after the COVID-19 virus is under control (in a post-COVID-19 pandemic world) (Figure 14). The post-pandemic impacts on travel are likely to be experienced by some of the respondents who stated that they did not know how their travel will change (29.8%), that they will travel less frequently than they used to (13.7%) and they will not travel (13.1%). Close to a third of the respondents (35.9%) indicated that they would travel about the same as they used to or more often than they used to (7.5%). The results show widespread desire to resume travel. However, those respondents who are unlikely to resume pre-pandemic travel patterns need to be targeted to change their perceptions and decisions.

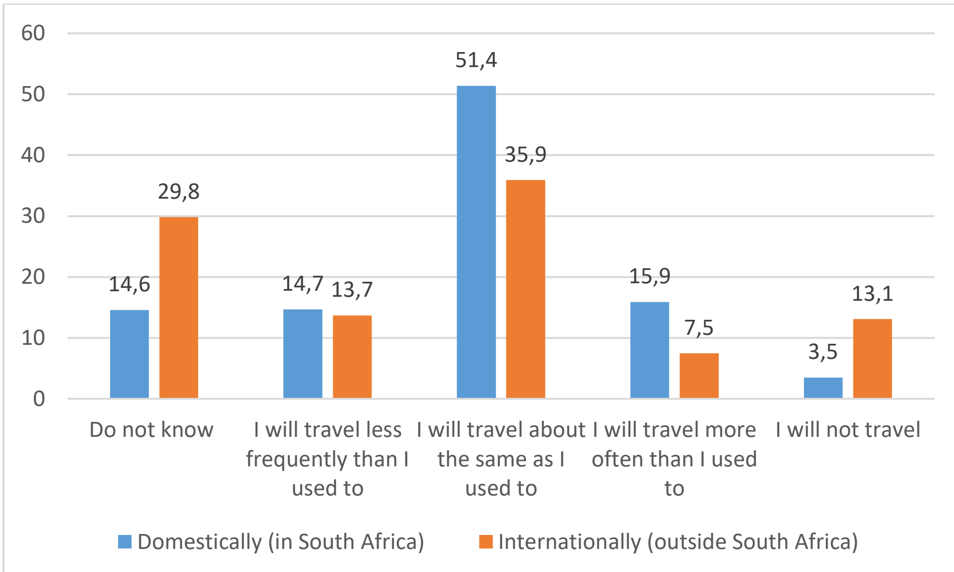


Figure 14: How intend to change domestic and international travel plans after the COVID-19 virus is under control (in a post-COVID-19 pandemic world) (n=1034, in %)

The chi-square test results from cross-tabulations examining the associations between selected respondent profile variables and if a domestic trip was affected by the pandemic and change in travel plans post the pandemic are presented in Table 39. For most variables, associations were noted with P values being less than .05 (highlighted in yellow). Cross-tabulation results show that more Indians and Coloureds who were 41 to 50 years old (middle-aged) and not in a relationship were likely to indicate that a domestic trip was affected by the pandemic. Additionally, respondents with undergraduate and postgraduate degrees (perhaps linked to business travel and discretionary income to travel), with lower incomes and household sizes of less than 4 persons reported that a domestic trip was affected by the pandemic. No associations were noted in relation to gender, employment status and provincial location of residence.

In relation to intention to change travel plans post the pandemic, with the exception of gender, associations were noted for the rest of the variables. Specifically, Black Africans were more likely to travel less frequently. This is a concern since encouraging Black Africans to travel is a key feature of the national tourism strategy. Additionally, 21 to 40 year olds and those not in a relationship or in a relationship but not living together were likely to travel more often. Respondents with undergraduate and postgraduate degrees, with higher incomes, who are employed and who reside in Gauteng, KwaZulu-Natal and Western Cape in households with less than 5 persons will travel the same as before the pandemic or more often.

Table 39: P values of chi-square test results examining associations between selected respondent profile variables and if domestic trip was affected by the pandemic, travel patterns prior to the pandemic and change in travel plans post the pandemic

	Domestic trip affected by the COVID-19 pandemic	How intend to change travel plans post-pandemic
Population group	.001	.000
Age	.000	.000
Gender	.191	.092
Marital status	.024	.000
Educational level attained	.001	.000
Employment status	.281	.000
Monthly income	.001	.000
Provincial location of residence	.103	.001
Household size	.023	.001

As indicated earlier, considering group size and type is important to enable effective and targeted marketing. Most respondents indicated that they would travel with someone, mostly in groups of between 2-4 persons (57.2%: 23.1% for 2 persons, 16.3% for 3 persons and 17.8% for 4 persons) (Table 40). A further 16.4% are likely to travel alone (mainly for business purposes). Targeting small groups should be a key feature of any marketing strategy. Understanding and responding to variations in group sizes that is evident as well will also be important.

Table 40: If willing to travel domestically, what would group (travelling and spending money together) size generally be (n=1034)

	Frequency	Percent
Not applicable/ not willing to travel	96	9.3
1 (travel alone)	170	16.4
2	239	23.1
3	169	16.3
4	184	17.8
5	93	9.0
6	41	4.0
7	4	.4
8	14	1.4
9	1	.1
10	8	.8
More than 10	15	1.5

In relation to the composition of the group, Table 41 reveals that the most prominent types of groups will be family and/ or friends (81.7%: 40.7% for family and friends, 27.8% for family and 13.2% for friends).). In South Africa, visiting friends and family is the main purpose for domestic travel as noted in the literature. Business associates (12.5%) also emerges as a key group composition. Other groups identified with less than 3% responses were educational, tour, work-related and church groups. The results reveal the importance of social and familial groups in relation to domestic tourism in South Africa. Thus, this is a key potential market and targeted packages should be developed to respond.

Table 41: If willing to travel domestically, who travel with (n=1034) (Multiple responses)

	Frequency	Percent
No response	3	.3
Not willing to travel	92	8.9
Not applicable (travel alone)	132	12.8
Friends	136	13.2
Family	287	27.8
Family and friends	421	40.7
Educational group	22	2.1
Business associates	127	12.3
Tour group	23	2.2
Church	1	.1
Flight crew	1	.1

Partner	5	.5

In keeping with social and familial visits, Table 42 shows that most respondents who were willing to travel domestically were willing to stay for 2 to 5 days per trip (21.1% for 3 nights, 19.9% for 5 nights, 13.4% for 4 nights and 11.4% for 2 nights). The 7-night package (10.4%) often associated with vacation travel is also noticeable.

Table 42: If willing to travel domestically, number of nights willing to stay per trip (n=1034)

	Frequency	Percent
No response	3	.3
Not willing to travel	95	9.2
1	25	2.4
2	118	11.4
3	218	21.1
4	139	13.4
5	206	19.9
6	32	3.1
7	108	10.4
8	7	.7
10	8	.8
More than 10	75	7.3

The majority of the respondents (90.7%) indicated the amount that they were willing to pay (in Rands) per trip for the group (including self and others such as family members travelling with) domestically (Table 43). With 9.2% indicating none/ will not travel and one person not responding. The majority of the respondents were willing to spend R1 001 to R20 000 (80.3%: 30% between R2 001 - R5 000, 27.5% between R5 001 - R10 000, 11.9% between R1 001 - R2 000 and 10.9% between R10 001 - R20 000). The results indicate that there is a willingness and ability to travel and spend among a sizeable proportion of the respondents. However, variations are evident that need to be considered when developing packages targeting domestic tourism.

Table 43: If willing to travel domestically, amount willing to pay (in Rands) per trip for the group (including self and others such as family members you are travelling with) (n=1034)

	Frequency	Percent
No response	1	.1
None/ will not travel	95	9.2
< 500	11	1.1
501-1000	55	5.3
1001-2000	123	11.9
2001-5000	310	30.0
5001-10000	284	27.5
10001-20000	113	10.9
> 20000	42	4.1

The chi-square test results from cross-tabulations examining the associations between selected respondent profile variables and group size, group composition, number of nights per trip and amount willing to pay per trip if willing to travel domestically are presented in Table 44. For most variables, associations were noted with P values being less than .05 (highlighted in yellow). Respondents indicating groups of 2 to 5 were more willing to travel. In relation to socio-demographic variables, mostly Indians/ Asians and Whites were in groups of 2 and 3, and Black Africans and Coloureds were in groups of 3 and 4. In terms of age, those 21 to 40 years old in groups of 1 (alone) to 4 were more likely to travel. Respondents in a relationship and living together as well as those who were married were more likely to travel in groups of 2 to 5 persons. Those with post-schooling qualifications (certificates as well as undergraduate and postgraduate degrees), who were employed and were earning more than R10 000 per month were more likely to travel in groups. Unsurprisingly, smaller households are likely to travel in smaller groups, especially given the prominence of visiting with friends and/ or family being the main group composition.

In relation to the number of nights willing to stay, Coloureds and Indians/ Asians, as well as those who were 21 to 40 years old, were more likely to stay for longer periods. Additionally, respondents who were married and in a relationship but not living together were more likely to travel with longer stays. Respondents who had undergraduate or postgraduate degrees were employed and had higher incomes were more likely to have longer stays. Respondents from Gauteng were more likely to have longer stays. Smaller household sizes (including those living alone) were more likely to stay for longer periods, which might be related to the cost of travelling with more persons.

In relation to the amount willing to pay per trip, Whites and Indians/ Asians as well as those who were older were more willing to pay larger amounts per trip, linked perhaps to economic household status. Respondents who were not in a relationship, employed as well as had undergraduate or postgraduate degrees were willing to spend more per trip. Unsurprisingly, respondents with higher incomes were generally willing to spend more per trip. Respondents from Gauteng and the Western Cape were willing to spend more per trip. Smaller household sizes (including those living alone) were more likely to stay for longer periods, which might be related to the cost of travelling with more persons.

The importance of being younger (particularly 21-40 years as a key target market), more mobile, having attained higher educational levels and having discretionary income to travel again emerge as factors that influence willingness to travel. Targeting persons residing in Gauteng, KwaZulu-Natal and the Western Cape (South Africa's main domestic tourism markets) remain. It is important to note that no notable differences were evident in relation to gender.

Table 44: P values of chi-square test results examining associations between selected respondent profile variables and group size, group composition, number of nights per trip and amount willing to pay per trip if willing to travel domestically

	Group size	Number of nights	Amount
Population group	.004	.000	.003
Age	.000	.000	.000
Gender	.117	.680	.508
Marital status	.000	.000	.000
Educational level attained	.000	.000	.000
Employment status	.000	.000	.000
Monthly income	.000	.000	.000
Provincial location of residence	.550	.000	.016
Household size	.000	.000	.439

The main purpose/ reasons for travelling overnight in South Africa prior to, during (at the time of the interview) and after the COVID-19 pandemic brought under control are shown in Table 45. In terms of the results, more respondents (19.1%) indicated that they would not travel at the time of the interview compared to before the pandemic (7.7%) and when the pandemic is brought under control (8.1%). In terms of the main reasons, there was an increase in the proportion of respondents who travelled to visit friends and family at the time of the interview (34.4%) compared to before the pandemic (25.5%) and when the pandemic is brought under control (21.3%). On the other hand, there was a decrease in the proportion of respondents who travelled for holiday/ vacation purposes at the time of the interview (29.2%) compared to before the pandemic (51.5%) and when the pandemic is brought under control (55.2%). Travel for business/ professional reasons had the least change (12.5% before the pandemic, 14% at the time of the interview and 11.4% after the pandemic is brought under control. The decline in this segment of travellers may be associated with the increase of virtual platforms during the pandemic. The shifts (change from before the COVID-19 pandemic to the time of the interview when the pandemic was still prevalent and similarities between reasons to travel before the pandemic and when the pandemic is brought under control) in reasons depict the COVID-19 pandemic impacts but also so that the resumption of travel is likely to occur once the COVID-19 pandemic is brought under control. This correlates with tourism service provider trends that indicate that domestic tourism is on a pathway to recovery.

Table 45: Main purpose/ reason for travelling overnight in South Africa prior to, during (at the time of the interview) and after the COVID-19 pandemic is brought under control (n=1034)

	Before the COVID-19 pandemic	At the time of the interview	After the COVID-19 pandemic is brought under control
No response	.9	1.7	1.6
None/ did not or will not travel	7.7	19.1	8.1
Visiting friends and relatives	25.5	34.4	21.3
Holiday/ vacation purposes	51.5	29.2	55.2
Shopping	.8	.6	1.4

Educational tours	.9	.8	.8
Business/ professional reasons	12.5	14.0	11.4
Church	.2	.1	.1
Sports	.1	.1	.1

The chi-square test results from cross-tabulations examining the associations between selected respondent profile variables and the main reason to travel before, at the time of the interview and post the pandemic are presented in Table 46. For most variables, associations were noted with P values being less than .05 (highlighted in yellow). While there is an association in relation to socio-demographic variables and the main reason to travel before, at the time of the interview and post the pandemic; it is important to note that the associations were generally similar across the three periods under consideration, suggesting that the main reasons remain and need to inform domestic tourism strategies. Specifically, more Whites and Indians travelled for vacation purposes while more Black Africans and Coloureds travelled to visit friends and family; with the exception of association post the pandemic where no discernible differences were noted. Persons between 21-40 years were more likely to travel for vacation purposes. Additionally, respondents who were married and single were more likely to travel for vacation purposes. Respondents who had undergraduate or postgraduate degrees were employed and had higher incomes were more likely to travel for vacation purposes. Respondents from Gauteng, KwaZulu-Natal and the Western Cape (the main domestic tourist markets) were more likely to travel for vacations purposes and to visit friends and family. Smaller household sizes (including those living alone) were more likely to travel for vacations purposes. Again, gender did not emerge as an influential factor.

Table 46: P values of chi-square test results examining associations between selected respondent profile variables and main reason to travel before, at the time of the interview and post the pandemic

	Main reason to travel before the pandemic	Main reason to travel at the time of the interview	Main reason to travel post the pandemic

Population group	.000	.000	.080
Age	.000	.000	.000
Gender	.472	.650	.654
Marital status	.000	.000	.000
Educational level attained	.000	.000	.000
Employment status	.000	.000	.000
Monthly income	.000	.000	.000
Provincial location of residence	.000	.000	.010
Household size	.000	.000	.000

11.2.3. Domestic travel and tourism consumption preferences

As indicated in the literature and identified by the tourism service providers, South Africa has a diversity of tourism destinations and products which varies in relation to consumption and demand. The multiple responses reflect that respondents are knowledgeable of and attracted to many domestic tourism products (Table 47). The main types of domestic tourism activities respondents were attracted to participate in (with more than 50% responses) were social (including visiting friends and relatives) (73%), coastal and marine tourism (visiting beach areas) (63.3%) and outdoors/ nature-based (game reserves, conservation areas, etc.) tourism (52.3%). The results reflect domestic tourism trends in South Africa in relation to visiting friends and relatives highlighted earlier and the prominence of nature-based tourism in the country. Other types of tourism identified by 20% to less than 50% of the responses were events tourism (sports, concerts, etc.) (29.5%), cultural and heritage tourism (26.8%) and cruise tourism (21.8%). As indicated in relation to tourism service provider respondents presented earlier, while staycations is not a tourism activity, it plays an important role to support tourism businesses, especially when consumption is low, as associated with the pandemic impacts. In this study, a third of the respondents (33.5%) were attracted to staycations. Fewer respondents (less than 20%) stated business tourism (meetings, conferences, exhibitions, etc.) (19.1%), visiting casinos (17.2%), religious tourism (7.9%), township tourism (4.7%), rural tourism (4.5%) and medical, health and wellness tourism (3.7%). It is important to note that different tourism products in South Africa often co-exist and complement each other. For example, cultural tourism (especially the sale of cultural artefacts or participating in cultural activities) are often at nature-based tourism sites (including beaches) and at events. Packaging tourism products, especially if at an attractive price point, to ensure multiple experiences will provide higher incentives to travel.

Table 47: Types of domestic tourism activities attracted to participate in (n=1034) (Multiple responses)

	Frequency	Percent
No response	28	2.7
None/ not applicable	4	.4
Coastal and marine tourism (visiting beach areas)	655	63.3
Cultural and heritage tourism	277	26.8
Outdoors/ nature-based (game reserves, conservation areas, etc.) tourism	541	52.3
Events tourism (sports, concerts, etc.)	305	29.5
Business tourism (meetings, conferences, exhibitions, etc.)	198	19.1
Rural tourism	47	4.5
Township tourism	49	4.7
Medical, health and wellness tourism	38	3.7
Religious tourism	82	7.9
Cruise tourism	225	21.8
Visiting casinos	178	17.2
Social (including visiting friends and relatives)	755	73.0
Staycations (exploring destinations/ tourism sites where or close to where one is residing and/ or staying in accommodation establishments in city/ area where home is located)	346	33.5

The chi-square test results from cross-tabulations examining the associations between selected respondent profile variables and selected domestic tourism activities attracted to are presented in Table 48. For most variables, associations were noted with P values being less than .05 (highlighted in yellow). More Black Africans and Indians/ Asians who are over 40 years old and single were likely to participate in coastal and marine tourism activities. Additionally, more respondents with secondary schooling (but not post-schooling qualifications) who were employed on a part-time basis or were students or unemployed were likely to participate in coastal and marine tourism activities. In terms of income, those respondents who earned less were likely to participate in coastal and marine tourism activities. This is linked to beach vacations being less costly. More respondents in Gauteng and KwaZulu-Natal who lived alone or in smaller households were likely to participate in coastal and marine tourism activities. Similar trends were noted for participation in outdoors/ nature-based tourism, which is expected since coastal and marine tourism and outdoors/ nature-based tourism are similar activities. The exception is that no association was noted in relation to household size.

Associations were also found for most variables in relation to participating in business tourism activities. There were no associations in relation to gender, population group and marital status. In terms of age, respondents between the ages of 31 and 60 years with undergraduate and postgraduate degrees who were employed and had higher incomes were more likely to participate in business activities. Respondents from Gauteng and the Western Cape were more likely to participate in business activities.

In relation to events tourism, no associations were noted in relation to population group and provincial location of residence. Younger respondents who were males and in a relationship displayed an interest in participating in events tourism. Respondents who had completed secondary schooling and were employed (earned an income) were more likely to participate in events tourism.

Associations were also found for most variables in relation to participating in social tourism activities (one of the main reasons for domestic travelling in South Africa). It is important to note that there were no associations in relation to gender, marital status and monthly income**.** Older respondents (over 40 years) with secondary schooling, certificates/ diplomas and undergraduate degrees who were employed were more likely to participate in social activities. Respondents from KwaZulu-Natal and households with less than 3 and more than 4 persons were more likely to participate in social activities.

Table 48: P values of chi-square test results examining associations between selected respondent profile variables and selected domestic tourism activities attracted to

	Coastal and marine tourism	Outdoors/ nature-based tourism	Business tourism	Social	Events tourism

Population group	.003	.000	.058	.001	.321
Age	.000	.000	.000	.002	.000
Gender	.616	.142	.316	.428	.005
Marital status	.001	.000	.051	.204	.003
Educational level attained	.000	.000	.000	.000	.002
Employment status	.000	.000	.000	.000	.002
Monthly income	.000	.000	.000	.164	.002
Provincial location of residence	.000	.000	.042	.000	.483
Household size	.000	.485	.198	.000	.487

In relation to the use and future preference for accommodation, Table 49 reveals changes in patterns of consumption from prior to the pandemic, at the time of the interview and after the COVID-19 pandemic is brought under control with, as revealed in earlier findings, more respondents not having plans to travel at the time of the interview. Almost equal proportions of respondents stayed with friends and relatives before the pandemic (33.2%) and at the time of the interview (34.3%), with lower proportions indicating this preference after the COVID-19 pandemic is brought under control. Staying in hotels (27.3% dropped to 14.1%), guesthouse/ bed and breakfast establishment (11.7% dropped to 7.8%) and self-catering units (11.8% dropped to 10.7%) had a decline in responses from before the pandemic to at the time of the interview but thereafter an increase almost back to pre-pandemic levels is noted (28.5%, 10.8% and 11.7%, respectively). Responses in relation to staying in private Airbnbs has seen an increase from 7% prior to the pandemic, 10.4% at the time of the interview and 11.8% after the pandemic is brought under control. The popularity of Airbnbs is aligned to international trends. Very few respondents stated camping/ caravanning.

Table 49: Where mainly stay (in terms of type of accommodation) when travelled in South Africa overnight prior to the COVID-19 pandemic and where prefer staying at the time of the interview and when the COVID-19 virus is brought under control (n=1034)

	Before the COVID-19 pandemic	At the time of the interview	After the COVID-19 pandemic is brought under control
No response	.8	2.1	1.9
None/ did or will not travel	7.2	19.4	7.4
Friends and relatives	33.2	34.3	27.1
Hotels	27.3	14.1	28.5
Guesthouse/ bed and breakfast establishment	11.7	7.8	10.8
Self-catering units	11.8	10.7	11.7
Camping/ caravanning	1.2	1.0	.7
Private Airbnb	7.0	10.4	11.8

In relation to how respondents generally travelled in South Africa from one destination to another when taking an overnight trip before the COVID-19 pandemic and preference for future travel, only minor changes are noted, indicating that travel patterns at destinations will be retained (Table 50). The main mode identified were airplanes (46.4% before the pandemic and 48% for future travel) which bodes well for the airline industry that has been severely devastated by the pandemic. Close to a third of the respondents stated private/ personal vehicle (32.9% before the pandemic and 32% for future travel). This is an interesting response given the fear of the virus expressed earlier. The responses could reflect that the public is more confident that the travel sector can be safe and/ or that the virus is no longer a major health threat with higher levels of vaccination and lower death rates associated with the virus, even when transmission is high. Fewer respondents (less than 5%) for both periods under examination identified rental vehicles, buses and minibus taxis. One respondent stated train.

Table 50: How generally travel in South Africa from one destination to another when taking an overnight trip before the COVID-19 pandemic and preference for future travel (n=1034)

	Before the COVID-19 pandemic	Future travel
No response	.3	1.5
Not applicable (did not or will not travel)	7.1	7.4
Private/ personal vehicle	32.9	32.0

Rental vehicle	3.4	4.2
Train	.1	.3
Minibus taxis	4.9	3.1
Bus	4.9	3.7
Airplane	46.4	48.0

At the tourist destination, the main modes of transport identified were private/ personal vehicles (54.4% before the pandemic and 57.4% for future travel) (Table 51). This suggests that when at the destination travellers are likely to use the vehicles of friends and relatives (correlating with one of the main reasons to travel). Other key modes identified were rental vehicles (20.9% before the pandemic and 18.9% for future travel) and ride-hailing services (such as Uber) (18.1% before the pandemic and 18.7% for future travel). Other forms of transport identified by some of the respondents were minibus taxis, buses and trains. Some respondents stated cycling and walking. The results indicate that there is a very low demand for public transport associated with domestic tourism, which links to concerns of safety and security aspects.

Table 51: Preferred mode of transport (when visiting sites, going to restaurants and entertainment areas, etc.) when at a place of visit before the COVID-19 pandemic and preferred mode of transport at the destination in the future be (n=1034) (Multiple responses)

	Before the COVID-19 pandemic	Future travel
No response	.7	.7
Not applicable (did not or will not travel)	7.1	7.3
Private/ personal vehicle	54.4	57.4
Rental vehicle	20.9	18.9
Ride-hailing services (such as Uber)	18.1	18.7
Train	.5	.2
Minibus taxis	5.9	3.8
Bus	1.4	1.2
Walking	3.2	2.9
Bikes/ cycling	.1	.3

There were multiple responses in relation to the provinces that respondents would most likely travel to for domestic tourism purposes, with 2.9% not responding (Figure 15). The top three provinces identified were KwaZulu-Natal (51.3%), the Western Cape (49.3%)

and Gauteng (39.7%). This was followed by the Eastern Cape (29.9%), Mpumalanga (22.7%) and then Free State (20.2%) with more than 20% responses. The provinces with less than 20% responses were the Northern Cape (15.4%), North West (12.8%) and Limpopo (12.7%). The results in part correlate with the main domestic and international tourism destinations in South Africa and the provinces where the interviews were held. The latter is important since it was noted that residents in South Africa tend to travel within provinces where their permanent place of residence is located. This could be associated with tourism products and activities being available across the country and cost considerations. The findings show that domestic tourism opportunities and demand exist in all provinces, which bodes well for the recovery of domestic tourism.

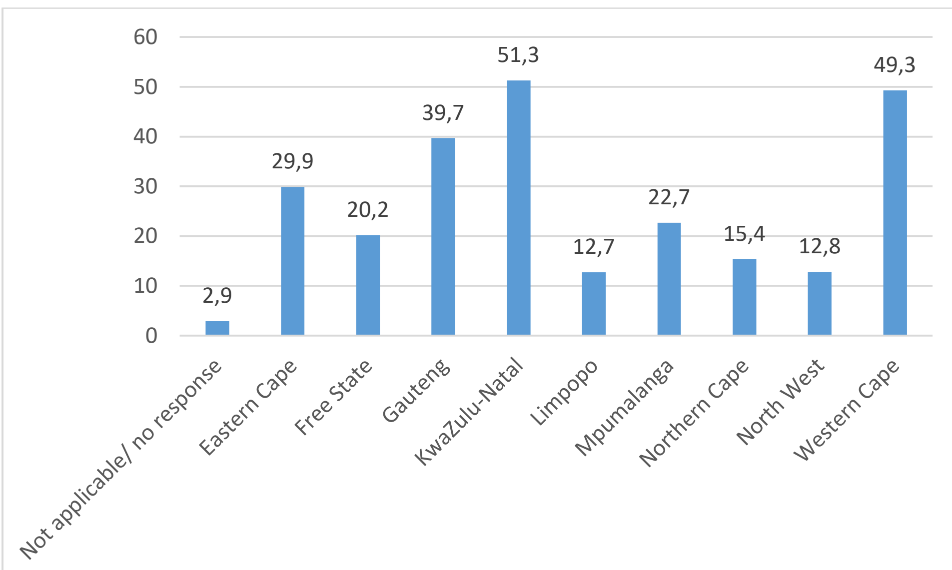


Figure 15: Provinces most likely travel to for domestic tourism purposes (n=1034, in %) (Multiple responses)

11.2.4. Perceptions of factors influencing domestic tourism choices/ decisions

As indicated in the literature and alluded to in the theoretical framework adopted for this study, a range of factors influence domestic travel choices/ decisions. This study reveals that for most respondents, the most important factors with the highest proportions of very important ratings were (Table 52):

- Seek out value for money domestic tourism destination/ less costly (5.8% for not important, 17.1% for slightly important and 73.1% for very important)
- Safe and secure destination (in terms of crime) (3.4% for not important, 24.6% for slightly important and 64.3% for very important)
- Safe to travel/ low risk of contracting the COVID-19 virus (3.7% for not important, 34.2% for slightly important and 56.9% for very important)
- Check on host destination's ability to maintain health and safety protocols (6.5% for not important, 29.7% for slightly important and 56.3% for very important)
- Choose destinations where information about the area, sites, activities and infrastructure are easily accessible on the internet (10.5% for not important, 32.6% for slightly important and 48.5% for very important)
- Check on the quality of the health care system at the host destination (6.5% for not important, 37.6% for slightly important and 48.2% for very important)
- Ensure that travel insurance covers pandemics or other forms of disruptions (6.6% for not important, 39.1% for slightly important and 45.5% for very important)
- Avoid travel using public transport at destination (12.4% for not important, 39.6% for slightly important and 40.5% for very important)

Aspects that had the highest ratings for slightly important were:

- Choose destinations where fewer tourists visit (21.2% for not important, 44% for slightly important and 26.1% for very important)
- Choose destinations that have a diversity of tourism products and attractions (11.6% for not important, 40.2% for slightly important and 39.2% for very important)
- Choose destinations that are environmentally friendly/ embrace green practices (12.9% for not important, 44.6% for slightly important and 29.5% for very important)
- Choose outdoors/ nature-based activities (16.3% for not important, 41.7% for slightly important and 34.6% for very important)

- Avoid travelling during high seasons when there are more tourists (16.3% for not important, 41.3% for slightly important and 32.5% for very important)
- Avoid group travel with persons not part of family and friends (such as tours) (14.2% for not important, 40.9% for slightly important and 36% for very important)
- Choose destinations that offer smart technology and a contactless tourism experience (14.3% for not important, 39.7% for slightly important and 36.7% for very important)

Only one factor had the highest rating for not important, which was to choose a destination closer to the home/ place of residence (49.1% for not important, 28.2% for slightly important and 17% for very important). This suggests that proximity to the place of residence is not an influential consideration. The results reveal that cost, safety and health considerations are important aspects that influence travel behaviour/ decisions. Cost and safety were important issues in relation to tourism prior to the pandemic and remains a key priority for the general public that need to be addressed in any recovery efforts.

Table 52: Extent to which specific factors will influence domestic travel choices/ decisions (n=1034)

	Not important	Slightly important	Very important	Do not know
Seek out value for money domestic tourism destination/ less costly	5.8	17.1	73.1	4.0
Choose a destination closer to my home/ place of residence	49.1	28.2	17.0	5.6
Choose destinations where information about the area, sites, activities and infrastructure are easily accessible on the internet	10.5	32.6	48.5	8.4
Choose destinations that have a diversity of tourism products and attractions	11.6	40.2	39.2	9.0
Choose destinations where fewer tourists visit	21.2	44.0	26.1	8.7
Choose outdoors/ nature-based activities	16.3	41.7	34.6	7.4

Choose destinations that offer smart technology and a contactless tourism experience	14.3	39.7	36.7	9.4
Avoid travelling during high seasons when there are more tourists	16.3	41.3	32.5	9.9
Avoid group travel with persons not part of family and friends (such as tours)	14.2	40.9	36.0	8.9
Avoid travel using public transport at destination	12.4	39.6	40.5	7.5
Check on host destination's ability to maintain health and safety protocols	6.5	29.7	56.3	7.5
Safe and secure destination (in terms of crime)	3.4	24.6	64.3	7.7
Check on the quality of the health care system at the host destination	6.5	37.6	48.2	7.7
Ensure that travel insurance covers pandemics or other forms of disruptions	6.6	39.1	45.5	8.9
Safe to travel/ low risk of contracting the COVID-19 virus	3.7	34.2	56.9	5.2
Choose destinations that are environmentally friendly/ embrace green practices	12.9	44.6	29.5	13.1

Several and multiple challenges/ barriers South Africans experience when deciding to take part in domestic tourism activities in the country were noted by the respondents (Table 53). The main challenges/ barriers with more than 60% of responses were not having sufficient funds/ disposable income (80.1%), worried about health issues when travelling/ fear of contracting the virus (71.7%), the fear of losing money due to cancellations/ postponements (68.8%) and concern about safety and security/ crime (68.7%). Challenges/ barriers with between 30% to 60% of responses were concern that lockdown restrictions/ regulations may leave visitors stranded (56.2%) and family commitments (children to young or elderly to take care of) (32.8%). Challenges/ barriers with less than 30% of responses were unable to travel (for example, being sick) (29.2%), tourism businesses being negatively impacted by COVID-19 pandemic (closures, limited services, etc.) (26.2%), not knowing where to travel in the current situation (22.7%), limited or poor quality travel/ transport options (22.3%), inadequate/ poor quality accommodation facilities (22.1%), domestic tourism products available are not appealing/ attractive (19.9%) and no one to travel with (12.9%). A few respondents (6.3%) indicated not interested/ do not enjoy travelling. Financial, safety and health-related aspects re-emerge as the key considerations.

Table 53: Challenges/ barriers South Africans experience when deciding to take part in domestic tourism activities in the country (n=1034) (Multiple responses)

	Frequency	Percent
Do not have sufficient funds/ disposable income	828	80.1
Fear of losing money due to cancellations/ postponements	711	68.8
Concerned about safety and security/ crime	709	68.6
Worried about health issues when travelling/ fear of contracting the virus	741	71.7
Concern that lockdown restrictions/ regulations may leave visitors stranded	581	56.2
Domestic tourism products available are not appealing/ attractive	206	19.9
Tourism businesses are negatively impacted by the COVID-19 pandemic (closures, limited services, etc.)	271	26.2
Do not know where to travel in the current situation	235	22.7
Inadequate/ poor quality accommodation facilities	229	22.1
Limited or poor quality travel/ transport options	231	22.3
No one to travel with	133	12.9
Family commitments (children to young or elderly to take care of)	339	32.8
Unable to travel (for example, being sick)	302	29.2
Not interested/ do not enjoy travelling	65	6.3

11.2.5. Support/ interventions for the domestic tourism sector for COVID-19 pandemic recovery

The majority of the respondents (89.6%) identified a range of different types/ kinds of support/ interventions that would assist the domestic tourism sector to recover from the impacts of the COVID-19 pandemic in South Africa (Table 54). Similar to the tourism service providers' responses, the multiple suggestions denote that a multi-pronged approach is needed to deal with the pandemic impacts. The highest responses (more than 50%) were for:

- Make it more cost-effective to travel so that residents can afford to do so (66%)
- Vaccination of the South African population (53.9%)

- Better marketing of tourism products/ inform residents of options to promote domestic tourism (52.9%)
- Improve safety and security measures (52.3%)

Forty to 50% of the respondents identified the following types of support/ interventions:

- Reducing entrance fees and accommodation rates at National parks (47.4%)
- Flexibility when purchasing tickets/ travel packages/ accommodation to change dates without penalties (47.1%)
- Improve the quality of existing tourism products/ attractions (43.9%)
- Reassure the public that facilities (for example, accommodation establishments) and tourism destinations/ attractions are ensuring that health and safety protocols are in place (43.1%)
- Improve the road and transport infrastructure (41%)

Less than 40% of the respondents identified the following types of support/ interventions:

- Develop more tourism products/ attractions targeting domestic tourists (39.7%)
- Provide domestic tourism packages/ promotions/ deals and discounts/ incentives/ rewards (36%)
- Profile domestic tourism destinations/ products/ sites on media platforms (30.9%)
- Develop more family-orientated tourist attractions (30%)
- Attractions, entertainment, leisure and recreational facilities to be fully operational and open (29.8%)
- Financial support (such as grants, loans, bridging support, etc.) to tourism businesses/ service providers (27.6%)
- Online/ virtual ‘tours’ to showcase domestic tourism destinations/ products/ sites (26.7%)
- Government tourism departments and private sector tourism sector service providers should work together to promote domestic tourism (25.1%)

Similar to the tourism service provider responses, the support needed for domestic tourism-related to providing financial incentives to make travel more cost-effective, paying attention to the health issues, focusing on safety and security aspects, and multiple but targeted marketing of tourism products/ attractions.

Table 54: Kinds of support/ interventions that would assist the domestic tourism sector to recover from the impacts of the COVID-19 pandemic in South Africa (n=1034) (Multiple responses)

	Frequency	Percent
None	108	10.4
Develop more tourism products/ attractions targeting domestic tourists	411	39.7
Improve the quality of existing tourism products/ attractions	454	43.9
Better marketing of tourism products/ inform residents of options to promote domestic tourism	547	52.9
Profile domestic tourism destinations/ products/ sites on media platforms	319	30.9
Online/ virtual 'tours' to showcase domestic tourism destinations/ products/ sites	276	26.7
Make it more cost-effective to travel so that residents can afford to do so	682	66.0
Flexibility when purchasing tickets/ travel packages/ accommodation to change dates without penalties	487	47.1
Provide domestic tourism packages/ promotions/ deals and discounts/ incentives/ rewards	372	36.0
Reducing entrance fees and accommodation rates at National parks	490	47.4
Attractions, entertainment, leisure and recreational facilities to be fully operational and open	308	29.8
Develop more family-orientated tourist attractions	310	30.0
Government tourism departments and private sector tourism sector service providers should work together to promote domestic tourism	260	25.1
Improve the road and transport infrastructure	424	41.0
Improve safety and security measures	541	52.3
Reassure public that facilities (for example, accommodation establishments) and tourism destinations/ attractions are ensuring that health and safety protocols are in place	446	43.1

Vaccination of the South African population	557	53.9
Financial support (such as grants, loans, bridging support, etc.) to tourism businesses/ service providers	285	27.6

Additional types of support/ interventions to assist in the recovery of domestic tourism in South Africa as well as comments were forwarded by some of the respondents. The comments were generally to reinforce financial issues, stop travel restrictions and the need to improve safety and security (in relation to health as well as generally). Providing financial support for tour guides, drivers, small businesses, etc. were noted. The lack of confidence in the government to develop appropriate measures and deal with corruption was also raised. Another aspect identified by one respondent related to inclusivity and transformation that not much attention is paid to is to take care of people with special needs.

'Localising' tourism recovery and supporting communities were advocated for by one of the respondents who stated:

> 'More local community people must be supported at local municipality level to participate in tourism economy - as owners. Vulnerable communities and their stories, heritage and culture are critical to authentic and appropriate product offerings. We want to experience South Africa in its full diversity. The authenticity of the people of the area is missing in the travel experience.'

Supporting local businesses (especially small businesses) was further indicated with some respondents advocating for employing people to be walkabout tour guides and supporting local tourism associations to ensure they are sustainable and can support, build and market local tourism products. Stopping discrimination and supporting all businesses that contribute to tourism was also stated by one of the respondents. Another respondent stated that there should be less racist profiling of Black customers.

Investing in and improving tourism infrastructure was also stated, especially the need to 'establish more tourism opportunities/ business to improve the economy and infrastructure'. One respondent indicated that there was a need to create new tourist sites in less popular locations such as Free State and North West.

Some specific suggestions were to develop a two-tier pricing system (with lower rates for locals/ domestic tourists) should be considered with one respondent stating:

> Introduce SADC (South African Development Community) rates to make travel for us South African residents also affordable. Many of our tourist attractions pricing is aimed at international tourists and are simply not affordable to most South Africans. SADC countries have had special rates for South Africans during low seasons since before COVID, now they have even better ones. Some lodges in South Africa are doing the same now but they are still overpriced. Have more and better specials for South Africans.

Another specific suggestion was to allow school excursions or trips to expose learners to travelling so that they will have a culture of travelling from a young age. Having interactive events was also identified. In relation to advertising and marketing, comments related to more extensive and targeted marketing. A specific suggestion was to work 'alongside local influencers to appeal to young people in the workforce who might feel it is too financially risky to travel'.

Almost all the respondents (91%) identified different ways in which they would like to receive information about domestic tourism products and incentives designed to assist the recovery of domestic tourism in South Africa, with 8.9% stating that they would not like to receive information and one not responding (Table 55). This suggests that the general public is desirous to receive information. The main ways that respondents preferred information to be communicated to them were via social media platforms (64.7%), the internet (52.9%) and television (44.4%). Other key ways of receiving information were the radio (27.8%), newspapers (19.1%) and magazines/ brochures (10.5%). A few respondents stated community events (4.7%), three indicated emails and one each stated exhibitions/ expos at major malls and mobile apps. The influence and prominence of information and communication technologies are clearly evident.

Table 55: How would like to receive information about domestic tourism products and incentives designed to assist the recovery of domestic tourism in South Africa (n=1034) (Multiple responses)

	Frequency	Percent
No response	1	.1
None (would not like to receive information)	92	8.9
Television	459	44.4
Radio	287	27.8
Social media platforms	669	64.7
The internet	547	52.9
Newspapers	198	19.1
Magazines/ brochures	109	10.5
Community events	49	4.7
Email	3	.3
Exhibitions/ expos at major malls	1	.1
Mobile Apps	1	.1

As in the case of the tourism service providers, respondents were asked to rate the extent to which they agree with statements regarding how South Africa's domestic tourism sector can be better positioned to deal with future disruptions (including climate change) to transition to a more resilient and sustainable sector. There was mostly support among the general public for the domestic tourism sector to embrace sustainable practices (Table 56). Specifically, the following statements were supported (combination of agreed and strongly agreed) by more than 80% of respondents:

- Use of local products (81.3%)
- Use local service providers (81.1%)
- Regular health screenings for employees and guests/ customers (80.8%)

Sixty to 80% of the respondents supported the following statements:

- Proper disposal of waste (including recycling and composting) (78%)
- Use local labour (76.8%)
- Conserving water in tourism establishments (for example, reuse of towels and use of greywater) (76.4%)
- Diversify domestic tourism products (72.3%)
- Promoting green behavioural change/ information on environmentally-friendly behaviour (71.8%)
- Purchase green/ fair trade products (69.9%)
- Support/ contribute to carbon offsetting projects/ greening programmes (69.2%)
- Support Corporate Social Responsibility (CSR) initiatives/ investments (64.3%)
- Permit staff/ employees to work from home, where feasible/ practical (61.8%)

Less than 50% of respondents supported the statement ‘conserving energy (for example, transitioning to renewable energy sources such as solar energy, use of energy-conserving lights and appliances, etc.)’ (58.6%). The generally high levels of support to embrace sustainable practices is a positive trend.

Table 56: Extent agree or disagree (DK – Don’t know, 1 = strongly disagree, 2 = disagree, 3 = neutral/ unsure/ don’t know, 4 = agree and 5 – strongly agree) with

the statements on specific resilience and sustainability aspects pertaining to how South Africa's domestic tourism sector can be better positioned to deal with future disruptions (including climate change) and become a more resilient and sustainable sector (n=1034)

	DK	1	2	3	4	5
Diversify domestic tourism products	6.6	1.5	1.1	18.6	43.9	28.4
Use local labour	4.3	2.2	2.3	14.4	43.0	33.8
Permit staff/ employees to work from home, where feasible/ practical	7.4	8.1	7.4	15.3	37.4	24.4
Use local service providers	4.6	1.8	1.8	10.6	47.4	33.7
Use of local products	4.6	1.3	2.9	9.9	47.4	33.9
Purchase green/ fair trade products	8.3	.9	6.5	14.5	44.9	25.0
Conserving water in tourism establishments (for example, reuse of towels and use of greywater)	5.6	1.5	2.6	13.8	48.9	27.5
Conserving energy (for example, transitioning to renewable energy sources such as solar energy, use of energy-conserving lights and appliances, etc.)	4.7	1.1	2.7	12.1	46.5	12.1
Proper disposal of waste (including recycling and composting)	4.9	1.5	4.6	10.9	48.5	29.5
Promoting green behavioural change/ information on environmentally-friendly behaviour	5.9	2.0	7.2	13.1	43.0	28.8
Regular health screenings for employees and guests/ customers	4.0	1.5	3.0	10.8	41.5	39.3
Support/ contribute to carbon offsetting projects/ greening programmes	10.1	1.2	7.1	12.5	43.3	25.9
Support Corporate Social Responsibility (CSR) initiatives/ investments	13.2	1.7	6.6	14.1	41.5	22.8

A word cloud (Figure 16) below was generated to depict responses in relation to what national government should specifically be focusing on to assist the domestic tourism sector to recover. The comments focussed mainly on promoting local tourism, financial issues, affordability and accessibility. The comments reinforce earlier discussions.

Figure 16: Word cloud depicting public respondents' keywords in relation to national government focus to assist domestic tourism to recover

12. Proposed domestic tourism recovery framework

12.1. Purpose for developing a framework for reigniting domestic tourism

This section is intended to develop an evidence-based (derived from the desktop study and the analysis of primary data collected) domestic tourism recovery framework/ model to inform engagement and implementation in Phase 2 of this project. Similarly to the approach adopted in relation to the SMME study (draft submitted to the Department of Tourism), the framework is designed to realise the objectives embodied in the Tourism Sector Recovery Plan (NDT, 2021) and the Economic Reconstruction and Recovery Plan (South African Government, nd) that adopts a three-phased approach: Engage and Preserve, Recovery and Reform, and Reconstruct and Transform. Its purpose is to map out how to shift the domestic tourism sector from the traditional industrial (production and consumption) to a more sustainable **ecosystem-based operational model** (Selen and Ogulin, 2015).

12.2. Scope of framework

The framework draws on tourism best practices locally and internationally (Pollock, 2012) and the theory on business operational models (Bocken and Geradts, 2020; Zott et al., 2011) to show how to create an enabling business ecosystem within which its occupants (domestic tourism businesses and domestic tourism travellers in this case) can operate as a community to build individual and systemic resilience and agility. The framework provides guidance on how to move domestic tourism from a position of recovery to one of resilience through a process of **reigniting** that is encapsulated as a process of sustainable regrowth by re-evaluating, reconfiguring, responding and stimulating domestic tourism demand.

The proposed framework draws from the tourism recovery strategy developed for the tourism sector (Figure 17) (NDT, 2021). Similarly, this framework will use a 3 phase recovery approach to characterise the domestic tourism sector which will reveal strategic leverage points for reigniting the sector. In relation to domestic tourism, a key aspect that needs to be underscored from the tourism sector recovery approach is the centrality of domestic tourism to reignite demand, specifically the need to 'catalyse domestic demand'. This framework also captures the importance of addressing key concerns among the general public and tourism service providers to promote domestic tourism such as safety and health considerations as well as a better understanding and targeting market segments via product diversification and incentives/ packages. Furthermore, broader enabling conditions (emerging from the survey findings as well) are noted that include the need for private and public sector partnerships, infrastructural improvements and development and investments in the sector.

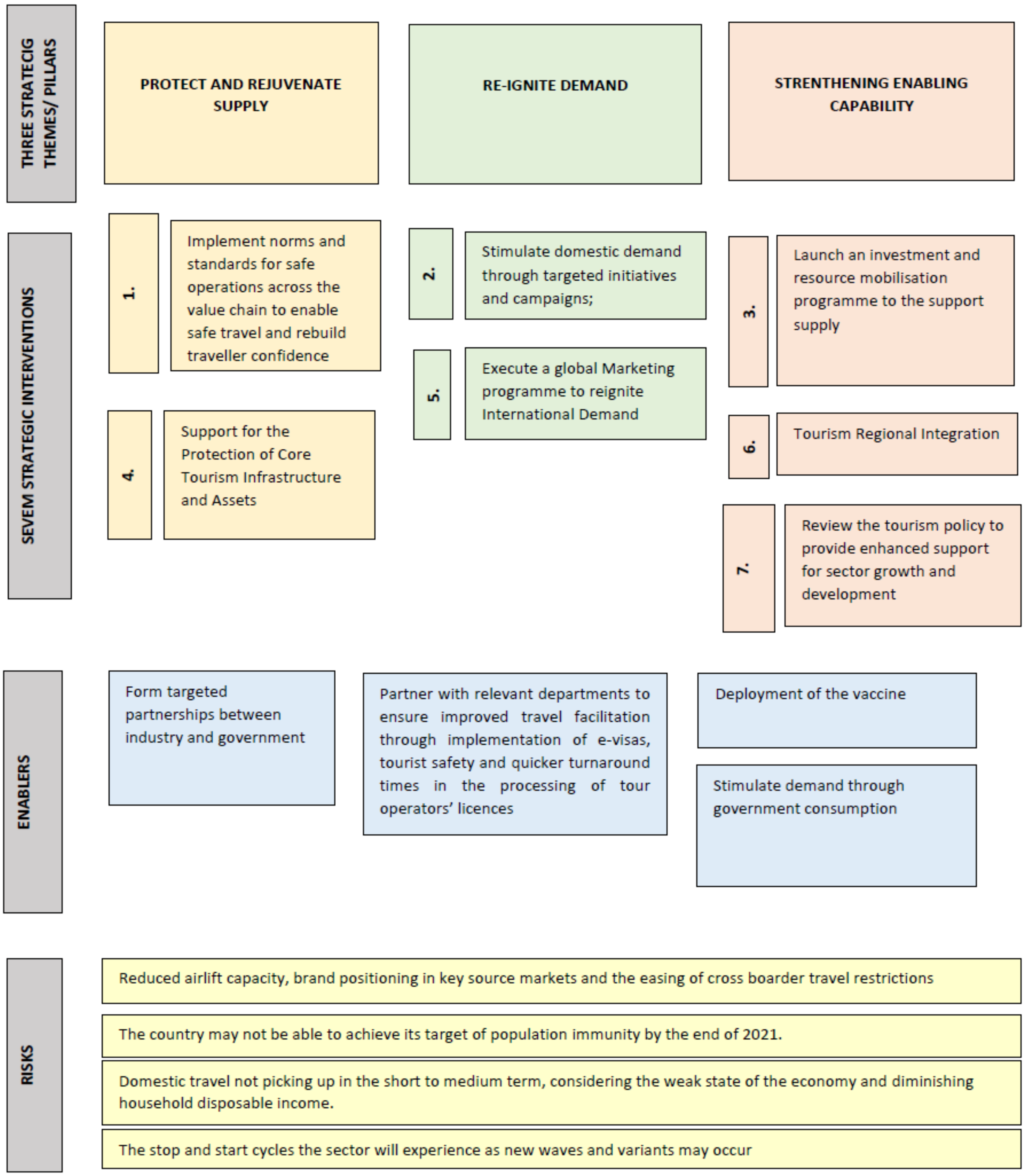


Figure 17: Overview of South Africa's Tourism Recovery Strategy (NDT, 2021: 25)

The proposed framework draws on the tourism recovery strategy by encouraging a phased approach to reignite the domestic sector through:

- **Phase one**: Stabilising and supporting domestic tourism supply.
- **Phase two**: Encouraging and enhancing strategic partnerships to address demand and marketing of domestic tourism products and offerings
- **Phase three**: Establishing relevant support that will transition towards resilient and sustainable growth of the domestic tourism sector.

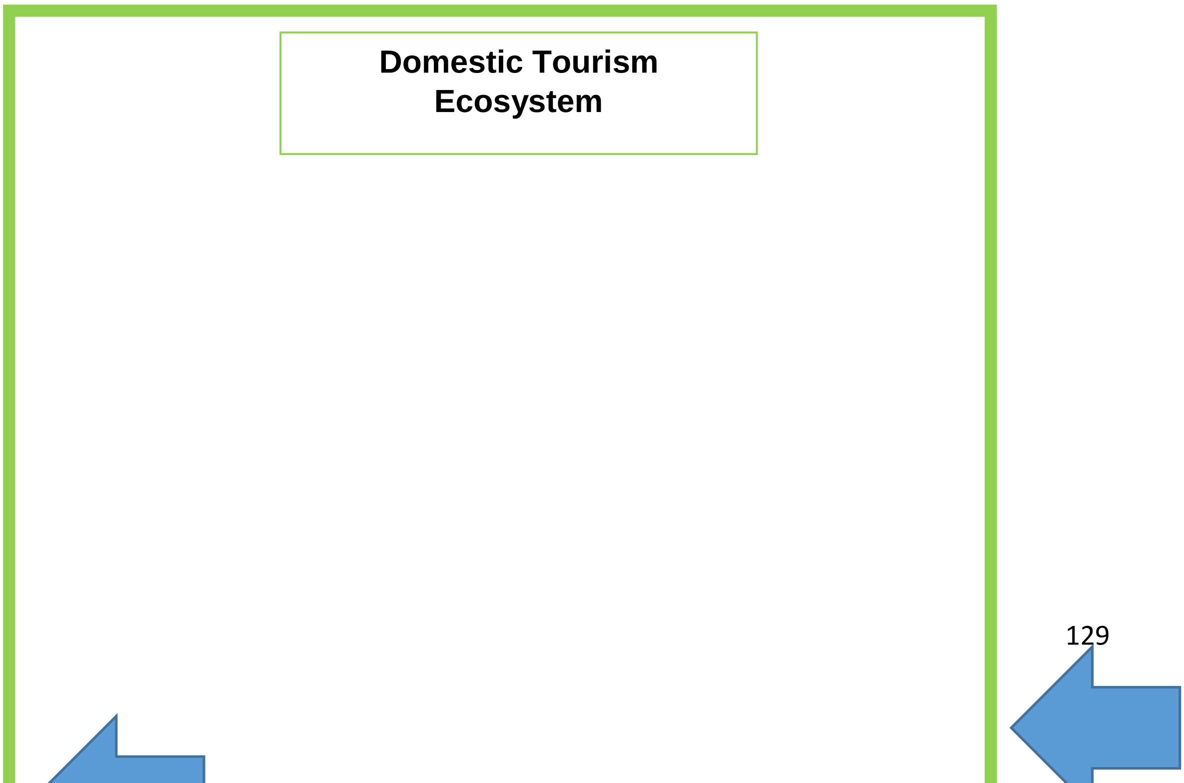
12.3. Rationale for framework proposed

As businesses globally become more and more modularised, describing entity relationships and characterising how business decisions or actions taken by one entity impact a system (the environment and its occupants) and all of the interrelated entities within it becomes a major challenge. This is particularly true for a sector such as domestic tourism in which different businesses and stakeholders are heavily reliant on each other and where ignoring interactions can lead to unexpected and potentially undesirable outcomes. In any effort to rehabilitate a system and ensure future resilience, it is therefore important to first systematically characterise the business ecosystem (or network) and analyse the potential impact of disruptions on demand/ business decisions of different entities in the network in order to make recommendations on how it can be reconfigured in order to bring about an improved response to future disruptions (that is, become resilient). This forms the basis of the framework proposed here, with the literature reviewed and the results of the surveys serving as the first layer of the ecosystem characterisation. More specifically, the survey data presented in the previous section have also shown that in the South African domestic tourism ecosystem, the functions and activities of entities overlap with those of others and while some entities have evolved over time (particularly during the pandemic) in response to reduced demand, the sector is subject to high levels of competition in a resource-limited environment. In the natural world, resource limitation can lead to high levels of competition within an ecosystem, which can, in turn, lead to mortalities. However, whilst some level of mortality is usually inevitable if the system can reconfigure itself, it can re-grow sustainably and respond better to future disruptions (periods of resource limitation) – in other words, it can become resilient.

With regards to the South African domestic tourism sector, a lot of effort has been put into growing the domestic tourism sector largely in response to addressing the social and economic inequities of the past. To this end, the sector has grown and diversified in terms of geography tremendously over the past two decades (Rogerson and Visser, 2020). However, whilst the sector has been assisted in terms of growth (size) the pandemic has raised questions around whether the sector has been sufficiently capacitated in terms of reading changes to tourism patterns and responding to these (Rogerson and Rogerson, 2021). In the natural world, an organism's ability to respond to a changing environment is governed by its ability to sense (evaluate) change and adapt its form and/ or function (reconfigure) in order to survive (regrow).

The framework developed here (see figure below), therefore, incorporates two key steps the domestic tourism sector must take to adapt to (respond) to the internal and external stresses brought about by the pandemic, namely re-evaluate and reconfigure. Furthermore, it illustrates that if this response does not further deplete resources (that is, it is sustainable), the ecosystem can regrow.

This ecosystem-based operational model proposed here (see Figure 18) has found support across a number of business sectors (Baghbadorani and Harandi, 2012; D'Souz et al., 2015) and has even been touted to be an approach to improving strategic alignment (Selen and Ogulin, 2015) and promoting sustainable competitiveness (Morant-Martínez et al., 2019) across a tourism business ecosystem.



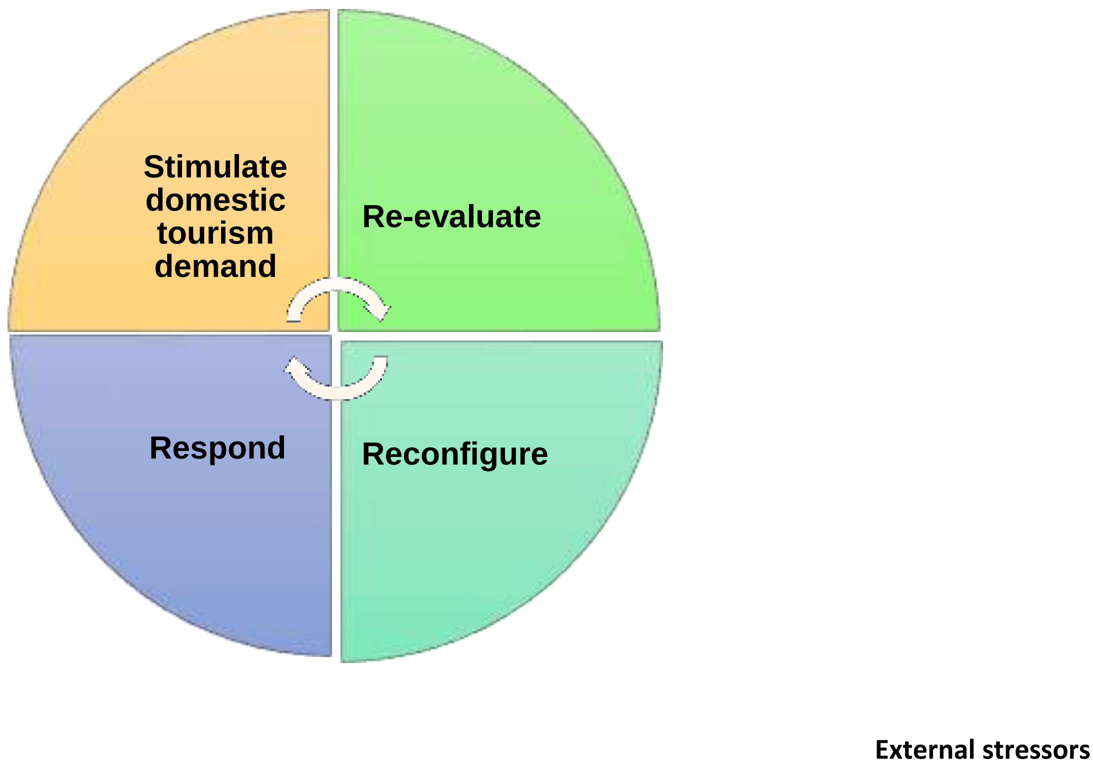


Figure 18: Framework for shifting domestic tourism sector to an ecosystem-based operational model for the purposes of sustainable regrowth (reignition)

Emerging strongly from the results and literature is the diversity that characterises the domestic tourism sector. This is inclusive of potential domestic tourist and destination profiles as well as product offerings. In addition, the range of formal and informal activities renders this sector particularly difficult to monitor and accommodate. In this regard, the approach of 'leave no one behind' holds particular significance, but is extremely difficult to achieve given the diversity in the sector and different levels of vulnerabilities and ability to cope with change. These issues are evident and highlighted in the SMME study as well.

In light of this, the suggested framework to reignite the domestic tourism sector needs to focus on the following:

- Understanding and creating incentives to support and encourage domestic tourism demand
- Facilitate greater representation and participation of the broad spectrum of stakeholders with an interest and involvement in promoting domestic tourism

- Accommodate and respond to socio-economic, environmental and geographic diversity in relation to domestic tourism
- Facilitate pandemic recovery and sector resilience, especially among tourism business and service providers so that the supply-side component of tourism is prepared for and responsive to domestic tourism demand
- Transition to sustainable and equitable practices that are embraced by both the general public and tourism service provider s evident in this study
- Support pandemic recovery and economic growth by stimulating domestic tourism
- Enhance governance and regulatory systems to effectively support domestic tourism efforts

Specific approaches and measures of the approach are discussed below.

12.4. Four steps supporting domestic tourism reignition

The steps defined in this section are based on the multiple types of evidence collected during the data collection phase and literature reviewed that form the framework for reigniting the domestic tourism sector: re-evaluate, reconfigure, respond and stimulate domestic tourism demand (sustainably). While the envisaged steps are sequential, it is recognised that current initiatives to stimulate domestic tourism are underway and will be ongoing. The steps are also circular in that it is recommended that regular re-evaluation occurs (especially when new disruptors or externalities emerge) that triggers reconfiguration, response and new initiatives or revisions to stimulate demand.

A. Re-evaluate

This step involves **re-evaluating** the culture, competitiveness, resilience and sustainability of the domestic tourism sector. Individual businesses and organisations that are focused on domestic tourism should also be capacitated to undertake this re-evaluation. It is imperative that the key stakeholders, including the Department of Tourism, have a good understanding of supply and demand-side aspects, including various price points, to inform the re-evaluation. To illustrate how important this step is, a SWOT analysis (Table 57), emanating from the literature reviewed and the survey findings, was undertaken. This highlights existing capacity and capabilities in the tourism ecosystem to support domestic tourism as well as weaknesses and threats that need to be considered and addressed when reigniting domestic tourism in South Africa.

Table 57: SWOT analysis of domestic tourism in South Africa

STRENGTHS	WEAKNESSES
• Diverse and well-established tourism products and services • Sufficient tourism infrastructure (including accommodation facilities, restaurants, retail establishments, etc.) • Local demand for tourism products with high levels of awareness of specific tourism products • Discretionary income potential among specific groups (and pent up demand in this group) • Youthful population and households that exhibit higher levels of willingness to travel • Well-established and active tourism organisations/ departments in the private and public sectors that function from local (municipal) to national levels • Some (although limited) funding and support available to assist tourism service providers	• Existing domestic tourism market is relatively small compared to the size of the South African population due to high levels of poverty and low disposal incomes • Ailing infrastructure (including transport, energy and water provision) that undermines tourism experiences and the ability to effectively market destinations • Tourism facilities (such as accommodation, restaurants and transport) at destinations are geared to cater for international tourism and are over-priced for general local consumption • Tourism products and experiences regarded as expensive for local consumption (linked to pricing for an international market) • Poor and ineffective marketing of domestic tourism products • Limited domestic use of tourism products and services
OPPORTUNITIES	**THREATS**
• Domestic mobility (including to visit friends and family) is widespread • High levels of willingness to travel • Length of stay is relatively high • Potential to convert day visitors and 'staycationers' to overnight visitors with the right domestic travel packages • General economic recovery underway, thus potential for increasing spend on travel and leisure • Market segmentation discernible that can inform targeted marketing • Potential to diversify tourism	• Competing with international tourism markets • Domestic tourism alone (without international tourism) is unlikely to sustain many tourism service providers • Safety and security considerations (worsened by the recent social unrest) • Financial barriers/ limitations to travel • Changes in consumption patterns in MICE (for example, virtual meetings and conferencing) • Limited capacity for job creation

products and offerings for the domestic market (more research required)	and economic growth affects both the demand for and supply of tourism products and services

B. Reconfigure

This step involves enabling businesses within the sector to reshape their own culture, change their operational model and reposition themselves in the ecosystem, to reduce competition, increase resource availability and be responsive. This will also involve guiding businesses to look outward at the responses of domestic tourism sectors in other countries to the stressors brought about by the pandemic as well as be geared towards responding to domestic tourism demand and travel preference changes. Fundamental to reconfiguring and changing the operational model of a business is the understanding of the current status quo. The DPSIR model (Figure 19) can provide a more holistic understanding of how the domestic tourism ecosystem responds to different drivers and pressures, particularly if the current conditions (COVID-19 pandemic) extend for prolonged periods into the future. The DPSIR, used to establish causal links in an integrated system, may allow for the identification of suitable factors to leverage in an attempt to strategically reposition a business in the ecosystem.

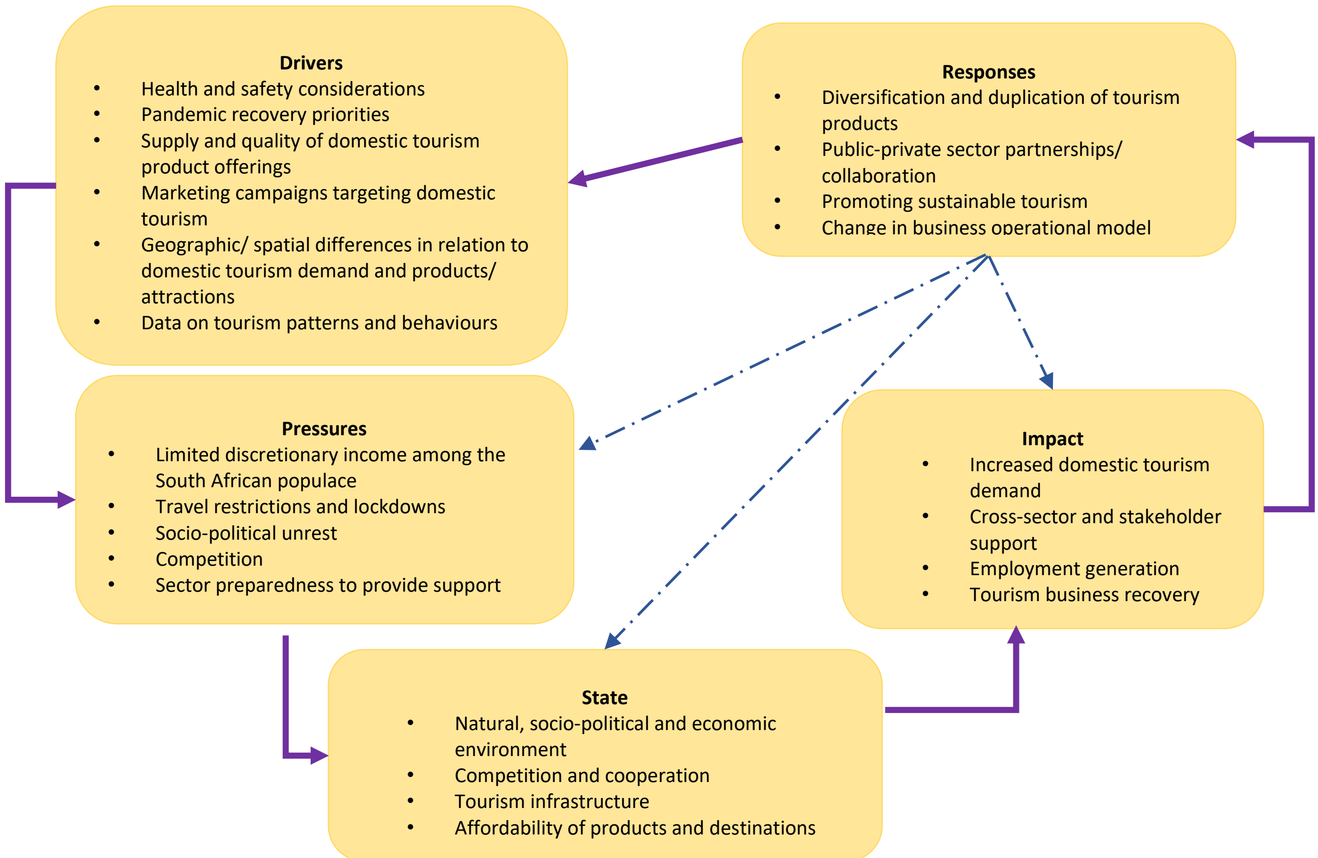


Figure 19: DPSIR model for domestic tourism (adapted from Wei et al., 2007)

The findings from this study underscore the importance of understanding that the reignition of the domestic tourism sector is dependent on tourist patterns and behaviours. The framework acknowledges that the decision to travel is comprised of several external and internal motivators, therefore, efforts to stimulate the sector must take into consideration the two domains that influence travel patterns and behaviours. Table 58 presents the external and internal domains that influence travel. Specific aspects such as the socio-demographic profiles of potential travellers, health and safety, affordability and quality of tourism experiences way heavily on decision-making processes.

Table 58: Internal and external factors influencing travel behaviour

Domain	Factors	Measures
External *(System)*	Health and safety	Risk and exposure Access and availability of medical support and services Pandemic responses and regulations
	Tourism competiveness	Supply of products and offerings Marketability Marketing strategies Affordability
	Geographic location	Provincial Urban, rural and township
	Natural disasters and climate	Nature and duration of disruptions Frequency of occurrences Disaster management and response
	Economic stability	Economic recovery Exchange rates Inflation
	Social unrest and conflict	Safety and security responses Crime prevention and monitoring
Internal *(Tourist)*	Socio-demographic	Gender Employment status Income Age Marital status and family size Level of education
	Attitudes and perceptions	Level of awareness Expectations
	Mobility	Physical and virtual

		Physical health and well-being (including disability status)
	Behaviour	Willingness and intention to travel Willingness to pay Wants and needs

The decision to travel can also be influenced by how much and what information is accessible. One intervention worth considering for facilitating reconfiguration within the domestic tourism sector is a domestic tourism reignition awareness campaign. This should be based on an understanding of best practices within the sector and the use of local and international case studies. The key elements of this design process are illustrated in Figure 20.

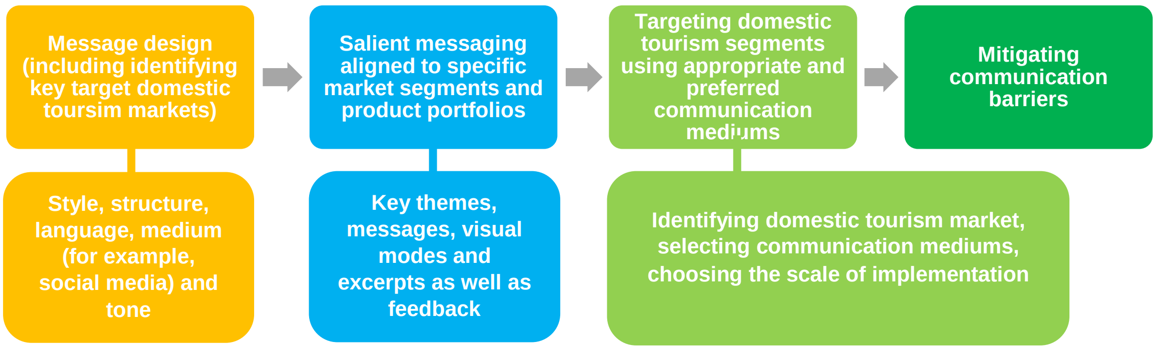


Figure 20: Outline of the possible framework for a domestic tourism reignition awareness campaign

Additionally, the suggested domestic tourism awareness campaigns should be tailored to suit the following:

- Type of tourism services and products
- Supply and demand of product offerings
- Geographic location

In parallel, training will be an important and critical component of building resilience among domestic tourism service providers to also be effective to attract and provide positive experiences for local travellers. There is a need to identify the type of training required as well as who should be targeted and potential service providers or collaborative partnerships with institutions to undertake the training. Key areas of training have been identified in the SMME report for tourism businesses that can be extended to tourism service providers.

C. Respond

This step involves enabling tourism supply-side service providers (including businesses, tourism marketing agencies, tourism government departments, etc.) within the ecosystem and the sector as a whole to respond to the stressors (internal and external) by adopting interventions (tools and measures) that promote resilience and responsiveness in relation to domestic tourism. In this regard, the aspects that need to be paid attention to elaborated in the SMME report should support domestic tourism efforts. In particular, key aspects identified were:

- Co-designed participatory processes that include relevant domestic tourism stakeholders
- Dynamic capabilities that "specialise in the adaptation of organisational traits towards an inclusive, sustainable, and multi-stakeholder enterprise model" (Zollo et al., 2016 cited in Aldianto et al., 2021: 4).
- Enhancement of technology capability that adequately understands and embraces technological changes to enhance their products, services and performance (Di Benedetto et al., 2008). This is a critical area that needs attention in the context of the 4th industrial revolution associated with rapid technological advancements. Specifically, technological upskilling and requisite education campaigns as well as the implementation of digital solutions on both the supply and demand-sides need to be taken into consideration.
- Consideration of future knowledge stock which can inform organisational learning and enables entrepreneurs to identify and take advantage of opportunities (Acs et al., 2009), in this case, tourism service providers to encourage and promote domestic tourism.
- Support innovation ambidexterity which embraces exploring new opportunities (Andriopoulos and Lewis, 2009).
- Alignment with existing policies, plans and strategies targeting domestic tourism.

Following the model proposed by Sharma et al. (2021) (Figure 21), responses to current disruptions are embedded in the need to promote transformation within the domestic tourism sector. Approaches to reignite the domestic tourism sector should actively redress historic inequalities and unsustainable practices that plagued the sector.

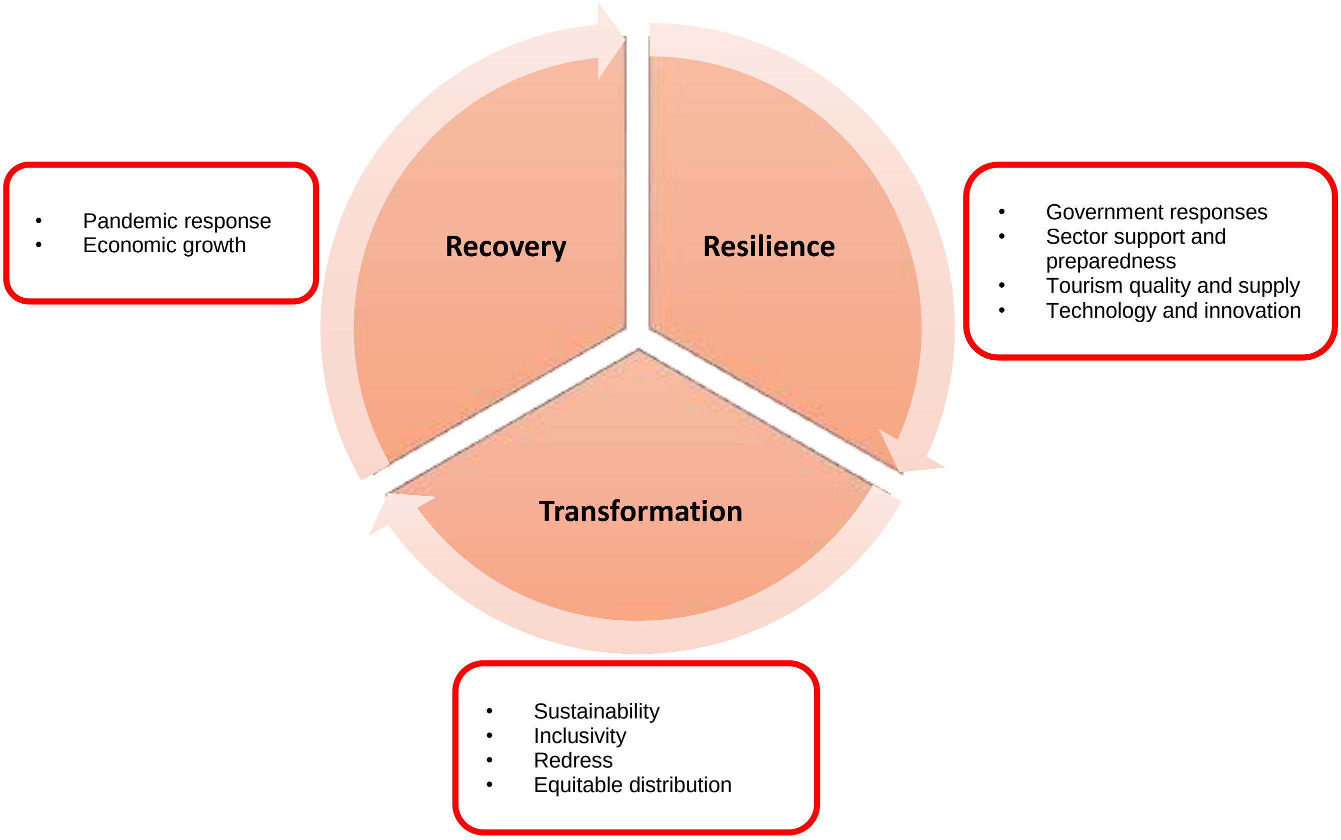


Figure 21: Framework for response (adapted from Sharma et al., 2021: 8)

D. Stimulating domestic tourism demand

A critical component of a domestic tourism strategy is to stimulate domestic tourism demand since increased consumption is key to the economic recovery of the sector. Several aspects emerge in the literature and research results in relation to the key aspects that need to be considered:

- Health and safety (no immediate post-pandemic – in the context need to focus on building trust and confidence that the tourism service providers and products are capable of keeping customers safe)
- Innovation, resilience and sustainability
- Alignment to product demand
- Marketing and brand awareness
- Cost considerations and incentives

In order to reignite domestic tourism in South Africa, key aspects are identified and briefly discussed to inform the development of a marketing and promotion strategy to encourage and sustain domestic tourism in South Africa.

Increasing and sustaining domestic tourism volumes (number of persons willing and able to travel)

- Develop affordable tourism packages/ incentives targeting specific market segments, for example, the elderly/ retirees, families, those who are single, persons in specific locations desiring to participate in specific activities, etc. This study reveals the value of research to unpack how socio-demographic variables can assist in better understanding different potential markets within South Africa. As consumption of tourism products increase and 'normalise', it is imperative that the sector demonstrates a focus on domestic travellers by offering off-season packages to reduce seasonality, increase spending and continuously encourage domestic travel.
- Create more opportunities for domestic travel experiences by undertaking co-packaging (for example, events), specifically local events and attractions need to be supported for better marketing of domestic tourism activities.
- Create an enabling environment for more persons to travel in South Africa for leisure and tourism purposes by having special deals and supporting socio-economic development to reduce barriers/ constraints to travel. While beyond the scope of the tourism sector stakeholders, it is important to note that increasing earning capacity and job creation are essential to enhance access to discretionary income.

Increase spending on domestic tourism products and services

- Increase use of existing tourism products/ attractions by converting day visitors and 'staycationers' to overnight stays and promoting travel within South Africa
- Develop new tourism products and/ or diversify existing product portfolios and attractions to encourage domestic travel and overnight stays, especially in relation to getting South African residents to spend on tourism products and activities. Visiting friends and family (a key motivation for domestic travel in South Africa) does, to some extent, contribute economically (spend on food and beverages, leisure activities, shopping, etc.) but does not support the accommodation sector and often there is limited consumption of tourism

products and experiences. The consumption of tourism products and services needs to be encouraged and strengthened.

- Key tourism destinations and attractions are noted in relation to demand among South African residents. These need to be considered to ensure that local demand is met with local supply.

Improved and targeted domestic tourism marketing

- Re-energise and rethink current efforts to promote domestic tourism in South Africa. For example, South Africa's Sho't Left Campaign, intended to anchor the country's domestic tourism campaign and encourage a culture of travel is a 'tired' approach that needs to be re-energised and re-packaged. Different types of initiatives and interventions are required to target the diverse market segments.
- Introduce new and innovative marketing campaigns that are targeted to different market segments and are sensitive to how people currently access information relating to travel options. The importance of technological advancements and digital platforms, in particular, have changed how people access information, how they want the information to be packaged and interactive ways in which decisions are made (pricing, deals, bookings, etc.). The role of the internet and social media is particularly important to integrate.
- There is generally a high level of awareness of tourism products and attractions in South Africa among the general population (and an interest in participating in diverse activities and travelling to different provinces, although preference for the three tourism provinces is evident). This is supported by the South African Tourism (2019b) findings. However, the Department of Tourism's domestic tourism approach needs to be revitalised and should focus less on only tourism excursions for select groups paid for by government and more on an integrated strategic approach in partnership with Enterprise Development to support diversification and inclusion of SMMEs and responsible tourism to drive community-based tourism and sustainability imperative. Furthermore, a domestic tourism communication and marketing strategy should focus on translating awareness to consumption. There should be consideration of

changes brought about by the COVID-19 pandemic impacts, including preferences on how to source information.

- The current domestic tourism communication and marketing strategies need to be revamped since it has not had a substantial impact on encouraging and sustaining levels of travel needed to support the economic recovery of the tourism sector.
- The conceptualisation, implementation and monitoring of a comprehensive and integrated domestic tourism marketing campaign are urgently needed that focuses on encouraging travel in South Africa under the current conditions.

12.5. Domestic tourism monitoring and evaluation framework

Why M&E?

The effective implementation of a domestic tourism recovery strategy (including communication and marketing campaigns) requires the development of a monitoring and evaluation framework that outlines who should do what, by when and what is hoped to be achieved (that is, the intended or expected impact). A monitoring and evaluation framework permits indicators to be tracked within stipulated timeframes, ensures that reporting is undertaken, assesses impacts, and informs revisions and adjustments. For ease of implementation, it is recommended that the indicators when formulated in consultation with key stakeholders in Phase 2 of this project be categorised into 3 Tier levels as advocated for by the United Nations (2022):

1. Tier 1: Indicator conceptually clear, established methodology and standards available and data regularly produced. Established track record of collecting and reporting on indicators.
2. Tier 2: Indicator conceptually clear, established methodology and standards are available, but data not regularly produced.
3. Tier 3: Indicator for which there is no established methodology or standards, but are being developed because of the agreed value of the indicator.

The key components that should constitute the Plan of Action for the execution of the monitoring and evaluation implementation plan (linked to a domestic tourism recovery strategy to be detailed in Phase 2 of the project and aligned to pertinent aspects of the

Department's Tourism Sector Recovery Plan) are championing, communication, institutionalisation, embedding and actioning.

Championing

The overall monitoring and evaluation custodian needs to be identified, which should be the Department of Tourism with decentralised responsibilities at provincial and local levels where interventions may be implemented and, more importantly, where information in relation to indicators are often sourced. The 'champion' should also ensure that proper consultation occurs and buy-in is secured with key stakeholders.

Monitoring and evaluation communication strategy

The Table below highlights who should be the focus of a monitoring and evaluation communication strategy, by when should communication occur and what is the purpose of communicating with different groups and stakeholders. A phased approach to institutionalise domestic tourism monitoring and evaluation is advocated. For each indicator formulated, the resources required to collect the information should also be identified.

Table 59: Monitoring and evaluation communication strategy: target groups, timeframes and reason for communication

Target groups	Timeframe/s	Reason/s for communication
Domestic tourism information/ data collectors/ generators: including national, provincial and local tourism departments as well as tourism organisations and departments collecting tourism	Initial implementation phase to generate baseline information (where non-existent) or to track changes pre-COVID-19 and thereafter at regular intervals to assess impacts and progress in achieving indicators. For each selected indicator, timelines need to be stipulated to ensure that	Identifying the sources of information and who will be responsible will ensure that domestic tourism data is collected and provided as required for monitoring and evaluation purposes. Data generators and custodians are fully aware of monitoring and evaluation timeframes and requirements. When the same information is required from multiple sources (for example, all provinces to submit

business information	information is collected timeously, verified and validated for improved quality assurance and reporting purposes.	information), it is critical that the methodology to collect the information is agreed upon to allow for the aggregation of data. This group will also alert the Department of Tourism to challenges that need to be addressed. Training needs can also be identified and included in the implementation plan.
Information/ data managers: this includes persons/ officials, units and organisations that routinely collect domestic tourism information	At the start of implementing the monitoring and evaluation framework. Thereafter, if needed to support capacity and development and improve domestic tourism monitoring and evaluation capabilities.	This group is generally responsible for verifying and quality assuring information s well as providing an oversight function. If well capacitated, they also have the capabilities to undertake different types of research that not only improves evaluation analyses but also assist in informing evidence-based decision-making in relation to identified strategic areas.
Data/ information users: includes departments and officials within government at different levels as well as tourism organisations	Need to be identified and appraised of the strategy, implementation plan and framework (best to include in consultative processes).	Maximises reporting and use value of domestic tourism information that can be used for strategic purposes, including the development of interventions/ programmes, resource allocation decisions as well as policy formulation and review. The dissemination of results will also be improved. In terms of domestic tourism recovery efforts, monitoring and evaluation will identify strategies and interventions that are working and those that are not, institutionalising evidence-based progress reporting and identifying.

Institutionalisation

Proper training of domestic tourism data/ information collectors, generators, managers and users is required within government at all levels and relevant tourism organisations. Part of Phase 2 will need to include the development of training materials to ensure that information about the domestic tourism monitoring and evaluation framework is visible and accessible to the target groups identified in Table 68, which will contribute to institutionalising domestic tourism monitoring and evaluation.

Developing capabilities within an ecosystems approach

To enable the domestic tourism monitoring and evaluation framework to be implemented, key issues that need to be unpacked further in Phase 2 are:

- Capacity: the necessary resources (including personnel and data management systems) are in place. If not, training and capacity needs should be identified and actioned.
- Capabilities: are personnel sufficiently trained to undertake the tasks associated with domestic tourism monitoring and evaluation? Improving domestic tourism data collection capabilities (including accessing existing relevant data from Statistics South Africa, South African Tourism and the Department of Trade and Industry) should also be a key focus area.
- Infrastructure: data management systems need to be adequate and functional.

Embedding

The domestic tourism monitoring and evaluation system should also interface with other systems where relevant domestic tourism data is stored to mine and update information. This integration is important to:

- Improves data quality
- Minimises data replication
- Decreases actual data collection, if already being collected (information is collected by the min custodian and accessible to other authorised users)
- Permits data to be aggregated and disaggregated to understand trends and impacts spatially

Actioning

For each selected indicator, regular monitoring is needed to track progress in relation to the agreed timeframes. The progress reporting is mainly to inform adjustments/

interventions, if required. These monitoring results need to inform higher level strategic evaluations that provide strategic assessments in relation to the recovery pathway of domestic tourism.

Proposed aspects to consider to identify indicators are presented in the Table below. It is important to note that these are illustrative examples and a comprehensive indicator framework will be developed in Phase 2.

Table 60: Key domestic tourism monitoring and evaluation indicators in South Africa

Aspect	Key indicators
Domestic tourism trends	Number and profiles of domestic tourists (including socio-demographic aspects such as population group, age, gender, educational, income, employment status, place of residence as well as group size and composition)
Domestic tourism products and services	Number of existing domestic tourism products, disaggregated at local and provincial levels as well as categorised by type of tourism product and services
Projects/ programmes to reignite domestic tourism	Number and types of projects/ programmes to reignite domestic tourism, categorised into types such as funding support (detailed later as a separate aspect), infrastructural investments, incentives targeting domestic tourism, training and capacity development projects/ programmes, improved internet connectivity and use to market domestic tourism, etc. Number and profiles of beneficiaries in relation to each project/ programme
Organisational support	Number and type of government departments, tourism organisations and private sector enterprises supporting domestic tourism recovery efforts
Job creation	Number and profiles of employees (including population group, age, gender, location and disability status which are key aspects associated with tracking equity and transformation imperatives in South Africa) employed in the tourism sector Types of jobs (including tourism sub-sector employed in, whether full-time or part-time/ contract) employed in
Funding/ investment	Amount of public and private sector funding supporting tourism SMMEs Number and profile (size of business in relation to the number of employees, turnover, location, etc.) of tourism SMMEs supported
Policy environment	Number of policies (national, provincial and local levels) that integrate domestic tourism aspects

Job creation and funding/ investment indicators need to be linked to Phase 2 of the SMME study as well.

It is clear the theoretical framework presented earlier, which guides the study, including the research design adopted for this study, accommodates a consideration of these aspects. In this regard, monitoring and evaluation become important to assess the impacts of these efforts and inform the development of future initiatives. Research should include resident perception studies of these campaigns and willingness to partake in domestic tourism activities. Furthermore, research should focus on targeted beneficiaries such as the tour operators in relation to the STS. Additionally, the various ways of promoting domestic tourism, including communication strategies, need to be assessed. Various approaches are used in South Africa, which includes holiday and travel expos, stokvel activations, websites, billboards, telescopic flags media, magazines as well as radio and television stations. South Africa requires a more synergistic and strategic manner of promoting domestic travel while concurrently developing affordable tourism products and packages for the range of local consumers.

Chirisa et al. (2020) stress that governments within African countries need to work with players in the private sector to establish virtual technology systems to build virtual interactions as well as to enhance resilience in tourism businesses on the continent. Additionally, Barth (2021) also stresses the importance of making the sector more inclusive and diverse. In this regard, Barth (2021) states that nurturing young talent as well as bringing in individuals from other sectors are important. This allows for the incorporation of fresh and unbiased ideas in the sector (Barth, 2021).

Tourism is regarded as a critically important sector with substantial potential to contribute to GDP and the potential for direct and indirect job creation and income opportunities. This job creation is particularly relevant in the South African context given the job losses incurred within the domestic tourism sectors and sectors associated with it. While other challenges faced by the South African Tourism sector have been ameliorated by adopting or adapting international approaches, reigniting the South African domestic tourism market within a COVID-19 environment will require bespoke interventions that can only be designed through the multidisciplinary research proposed.

In summary, the framework encapsulates positioning domestic tourism to transition from recovery (which is already underway) to resilience and sustainability, embedded in the ecosystem-based operational model. Catalysing and sustaining domestic tourism demand (even in the face of disruptions and externalities are central to the proposed framework. The promotion of domestic tourism (stimulating domestic tourism demand) can best be achieved when both products and target markets align as well as broader enabling conditions are improved. The domestic tourism sector must respond to internal and external stresses (including the pandemic) by adopting an approach of re-evaluation and reconfiguration. A critical part of re-evaluation is to undertake a SWOT analysis that highlights existing capacities and capabilities in the tourism ecosystem to support domestic tourism as well as weaknesses and threats. The reconfiguration step embraces using the DPSIR model to assess how domestic tourism responds to drivers and pressures in the South African context, and the impacts thereof. Additionally, internal and external factors that influence travel behaviour are examined. Developing effective awareness campaigns (linked to a domestic tourism communication strategy) is also a key part of the reconfiguration and reignition stage. The respond step is supporting supply-side service providers to respond to stressors and demand. Recovery, resilience and transformation are also important components of response. Re-evaluation, reconfiguration and response lead to stimulating domestic tourism demand by focusing on increasing and sustaining domestic tourism volumes, increasing spending on domestic tourism products and services, and improving and having targeted domestic tourism marketing. A monitoring and evaluation framework assesses impacts and trends as well as informs revisions and adjustments. Indicators are formulated (with targets and timeframes) to assess demand in relation to the number and profiles of domestic tourists, domestic tourism products and services, projects and programmes to reignite domestic tourism, the provision of organisational support, job creation impacts, funding/ investment to promote domestic tourism, and policies aligned to the promotion of domestic tourism.

13. Conclusion

In the South African context, tourism generally and domestic tourism more specifically is a major socio-economic and job creation contributor. The key aspects of domestic tourism relate to directing resident expenditure into South Africa; thus increasing the balance of payments, redistributing wealth and contributing to economic growth within the country. Economic leakages, associated with tourism, are also reduced. Furthermore, the domestic tourism market is important in reducing the seasonality of demand (and in the context of the COVID-19 pandemic, the substantial reduction of inbound and domestic travel). This improves the sustainability of tourism services and products, and ensures that service providers can cope with changes in demand. Reigniting domestic tourism is, therefore, critical for the tourism sector, the South African economy and to retain/ sustain jobs.

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