tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

UNIVERSITY OF JOHANNESBURG

Final report:

The Impact of COVID-19 on Tourism Sector Demand and Supply in South Africa

University of Johannesburg

Date: March 2021

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List of Abbreviations

AIEST… International Association of Scientific Experts in Tourism

BEE………. Black Economic Empowerment

COVID-19… Coronavirus Disease

DSTV…….. Digital Satellite Television Service

GDP……… Gross Domestic Product

ILO…… International Labour Organisation

MERS…… Middle East Respiratory Syndrome

MICE……. Meetings, Incentives, Conferences and Exhibitions

NFTGA….. National Federation of Tourist Guides and Affiliates

OECD….. Organisation for Economic Cooperation and Development

PATS……. Pandemic Anxiety Travel Scale

SARS… Severe Acute Respiratory Syndrome

SDG….. United Nations Sustainable Development Goal

SMME……. Small, Medium and Micro-Enterprise

TERS……. Temporary Employer/Employee Relief Scheme

TRINET….. Tourism Research Information Network

UIF……….. Unemployment Insurance Fund

UNCTAD.. United Nations Conference on Trade and Development

UNESCO…. United Nations Educational, Scientific and Cultural Organisation

UNWTO… United Nations World Tourism Organisation

USA…….. United States of America

VAT…….. Value Added Tax

VFR…. Visiting Friends and Relatives

Executive Summary

The 2020 COVID-19 pandemic is the third and greatest economic, financial and social shock of the 21st century after 9/11 and the global financial crisis of 2008. The outbreak has been labelled as a 'black-swan event' and likened to scenes reminiscent of World War Two as it causes turmoil across the world economy with adverse implications across nearly all sectors of activity and life. The hospitality and tourism sector, including commercial aviation, has experienced amongst the worst socio-economic impacts of the pandemic. In looking forward two differing narratives or schools of thought are emerging in contemporary tourism debates about COVID-19. Both narratives highlight the seriousness of the COVID-19 pandemic for global tourism albeit differ in terms of what comes or should come next. First, is a 'resilience school of thought' which stresses the historical capacity of the tourism sector to cope with or adapt to shocks such as the global financial crisis, SARS, or natural events such as earthquakes or tsunamis. The emphasis is upon the sector's capacity to return to pre-crisis growth paths. This perspective is one which is projected by much of the tourism industry and the majority of national governments including by the Department of Tourism in South Africa. Second, is a 'readjustment school of thought' which emphasizes the need to re-think of the growth at all cost and volume at all cost growth path for tourism which has dominated in recent years and in part is responsible for the current crisis. For this second school COVID-19 is a watershed or turning point for tourism and projects that its impacts will be irreversible as it will fundamentally shift the nature of tourism and human mobility into the future. Therefore, according to several observers, the pandemic represents a paradigm shift in research on tourists' behaviour and decision-making because what was previously taken for granted may not hold in the COVID-19 era.

In common with the rest of the world, the tourism sector of South Africa experienced the radical impacts of COVID-19. Indeed, as is the situation across the world, the pandemic represents a crisis event that potentially is set to transform South Africa's tourism sector as well as the context in which it functions. Arguably, the magnitude of the pandemic will reshape existing patterns of tourism demand and supply which need to be understood and researched for designing appropriate policy interventions. Domestic tourism is recognised as a beacon of hope and a catalyst for the recovery of the tourism sector as it reopens gradually post COVID-19. This optimistic view on the domestic sector necessitates that the country's role players reflect on opportunities and challenges that lie ahead to shape the sector's supply and demand in order to meet the needs of future domestic tourists. On this issue a knowledge gap exists and research is required to understand how COVID-19 has affected the supply and demand of tourism products in South Africa. This is essential to devise interventions that might address the needs of future tourists, particularly domestic tourists, post COVID-19. The unfolding negative effects of the pandemic are evidenced in the tourism industry surveys conducted in 2020 by the Department of Tourism, Tourism Business Council of South Africa and International Finance Corporation.

It is against the background of the rolling COVID-19 pandemic, its devastating impacts for tourism and initiatives for re-igniting demand focused on domestic tourism that this research was undertaken. The purpose of the study is to assess the impact of COVID-19 on the demand and supply of tourism products, with a view to propose interventions to meet the needs of tourists post-COVID-19. The research approach involves undertaking case studies of local destinations which offer a differing mix of tourism products. The objectives of the investigation are sixfold. First, is to conduct as background a literature scan/survey of international debates and practice on initiatives for revival of domestic tourism post-COVID-19. Second, to identify tourism-dependent localities in South Africa for case study analysis. Three, to examine possible effects of COVID-19 on the demand for tourism products. Four, to analyse possible effects of COVID-19 on the supply of tourism products. Five, to assess challenges that may affect the sector in order to meet the needs of tourists post-COVID-19. Six, to assess opportunities that may arise to shape the sector's supply and demand in order to meet the needs and demands of (mainly) domestic tourists. Two sets of work were undertaken relating respectively to demand-side and supply-side issues and both are of equal significance for this project. It must be understood that the study is NOT focussed on the specific challenges of particular forms of tourism (such as backpacker tourism, rural tourism, food tourism) but an exploration of the supply/demand issues and challenges ACROSS a range of different forms of tourism.

The research design combined desk-top surveys and qualitative interviews. The demand-side desk top surveys were driven by a search for best policy practice and for relevant investigations that inform the study objectives. Qualitative data collection was conducted through in-depth interviews undertaken through a mix of telephonic and in person interviews with due respect to COVID-19 safety issues. Key stakeholders in each of the three case study areas were targeted to obtain the information necessary to achieve the study's objectives. All interviews were semi-structured as this interview type allows for the extraction of consistent information across respondents, while allowing respondents to discuss freely and in detail, the unique aspects related to their processes.

The demand-side focus involved a desk top review of a large number of research studies undertaken/are currently being pursued on COVID-19 and consumer travel intentions in various parts of the world. Since lockdowns began in March 2020 a large number of investigations using online surveys of travel intentions have been done by several different international organisations as well as by others working on behalf of national tourism agencies. In addition, there has been a major burst of academic studies similarly using online surveys to examine aspects of possible changes in consumer demand in relation to COVID-19. By conducting a scan of material and of published studies through Google Scholar research on consumer demand was sourced for over 20 countries. Taken together the results from these accessed studies undertaken across 23 different countries (including three from Africa) by international agencies, national tourism bodies as well as academic investigations reveal an emerging consensus on the shifting demand side of domestic tourism in the COVID-19 environment. As a whole they reveal several themes which are common across countries in terms of risk perceptions and consumer travel intentions as well as of changing demand preferences in the context of the risks associated with travel in the continuing COVID-19 crisis. The results from this desk-top research provided essential insight into domestic tourist demand behaviour in the COVID-19 era.

The supply-side of the research was done through the approach/lens of undertaking case studies of local destinations each of which offers a differing mix of tourism products and thus of challenges/opportunities. Three locality case studies were undertaken of tourism product clusters focused on Bela-Bela, Limpopo, Bushbuckridge, Mpumalanga and Overstrand, Western Cape. These areas were selected as they are strongly tourism-dependent. In each of the three case study destinations qualitative interviews were undertaken with key private sector tourism product owners. The interview schedule was designed to determine the issues of COVID-19 impacts including responses of enterprises, their challenges and potential support requirements/interventions to address any opportunities in relation to domestic tourism. In total 60 interviews were completed with 20 in each case study. Themes in the interviews include: (1) tourism product/length of business establishment and impact of COVID-19 on enterprises; (2) challenges faced by firms in the COVID-19 environment; (3) importance of domestic tourism and perception of new domestic tourism opportunities; (4) supply-side responses (enterprises) with existing products; (5) changes (if any) made or planned by firms towards new products to supply the domestic tourism market; (6) cooperative actions with local enterprises; and, (7) suggested interventions that might assist businesses to better address anticipated demands of domestic tourists in the continued COVID-19 environment and thereafter. Interview material was analysed through content thematic analysis.

The findings on the demand-side are related to four core themes namely:

- Risk Perceptions and the New Tourism Psyche;
- Travel Intentions and Changing Mobilities;
- Travel Intentions and Changing Patterns of Demand; and
- The Contactless Economy and Untact Tourism.

Risk perception is at the core of the behaviour of travellers. It can be defined as individuals' perception of the probability that an action may expose them to a threat that can impact travel decisions if the perceived danger is deemed to be beyond an acceptable level. Perceived risk is associated with a tourist's perception of uncertainty and the potential negative outcomes from the consumption of particular tourism options. Under circumstances of natural disaster, political instability/ terrorism or a pandemic an increased perceived risk can result in a decrease in overall tourism demand as well as changing preferences for particular forms of tourism. Perceived risk is obviously a key influence on consumer intentions to travel and choice of travel to certain destinations and avoid others in relation to COVID-19. Kock et al. (2020: 1) make the important observation that COVID-19 "will reshuffle taken-for-granted determinants of tourism as we know it" and in addition observe that "a crucial shift is likely to occur in tourists' psyche". They maintain that whilst the pandemic might fade and travel barriers be lifted "some tourists' psyches will settle on a new equilibrium" (Kock et al., 2020: 1). For tourism policy-makers, an understanding of this altered make-up of the tourist psyche is critical. The pandemic can represent a paradigm shift for researching tourist behaviour and decision making as it is reiterated "what was previously taken for granted may not hold anymore in the COVID-19 era"(Kock et al., 2020: 2).

In the international literature at least six specific issues around the new tourism psyche are highlighted. First, is that exposure to a disease threat can make people more 'collectivistic' by giving preference to domestic over foreign travel, seeking to support their own local economy in a form of behaviour which is styled as 'tourism ethnocentrism' which is defined as "an individual's prescriptive beliefs and felt moral obligation to support the domestic tourism economy" (Kock et al., 2019a: 427-428). Second, is the 'home-is-safer-than-abroad bias' in terms of which tourists regard their home country as a 'safe' destination and that "home is safe, no matter where home is" (Wolff et al., 2019). Explanations for this are that risk aversion is higher when considering international as opposed to domestic travel; in addition domestic travel offers a prospect of increased personal control anchored on a belief that "one is better in avoiding risks at home than in a foreign country" (Wolff et al., 2019: 6). Three, certain researchers suggest that holiday travel as a form of conspicuous consumption for the prestige enhancement of individuals may shift as 'the tourist' might be viewed in changing public discourse as a potentially dangerous 'infectious intruder and correspondingly decrease the role of travel as a vehicle of conspicuous consumption.

Four, COVID-19 threats make people alert of and avoiding crowded situations, a mind shift about 'crowdedness' that results in preferences for visits to more remote and less populated tourist areas as compared to overcrowded traditional mass tourism destinations. This was confirmed in the 26 country study by Bieger and Laesser (2020) which underlined that when people travelled they tended to prefer quiet areas that allow for social distancing such as mountains or the countryside, including national and state parks. Five, a critical but uncertain aspect of tourism behaviour is the extent to which COVID-19 will encourage people to become more environmentally conscious in their travel behaviour in order to counter threats posed by climate change, environmental destruction and the spread of infectious diseases. Several authors have called for such forms of behavioural change. Finally, the new tourist psyche potentially can cause an avoidance of unknown things as a whole and the tendency towards what is termed 'tourism xenophobia' as tourists experience feelings of discomfort with locals as strangers. This perception coupled with a self-image of being a" temporary outsider in a foreign space" can result in feelings of vulnerability and higher travel risk which are exacerbated in the context of a disease outbreak. The new tourism psyche around perceived risk underpins observed changes by international researchers in consumer mobilities and patterns of demand.

Concerning mobilities Wood (2021: 14) argues the COVID-19 pandemic has made painfully clear that leisure travel "has ostensibly become a devil's bargain in which privileged people trade planetary and public health for their own pleasure and personal enrichment". From multiple surveys conducted across several countries there is a growing weight of evidence that COVID-19 is exerting a major impact in terms of travel intentions in relation to changing mobilities and modes of travel of those privileged to travel either for leisure or business purposes. The most common findings are that consumers are pivoting away from modes of transport that involve higher perceived risks and exposure to other tourists – most notably cruise ships, air travel, as well as certain public bus and rail transport. The preferred shifts are towards private forms of mobility, including private cars, rented cars and, in some countries, for campervans. The international results point to the potential close of the era of 'aquamobilities' in the form of extensive participation in cruise tourism, a finding of policy significance in terms of planning for the oceans economy. The COVID-19 demand shift in mobilities towards the greater use of the private car, rental vehicle or motor-home is important also as it contains a number of implications for tourism policy-makers. Arguably, the propensity to travel via personally-owned or hired cars or campervans points to the need to (re-)examine the role of automobilities and of drive tourism. With drive tourism there emerge new opportunities to stimulate local tourism economies including the possibilities for remote and rural tourism destinations. Several critical policy issues arise with automobilities in terms of organising and enhancing awareness of tourism routes, safety on roads, signage, and improving road infrastructure quality in remote areas that often are not always the major focus of concern for policy-makers. Support for self-drive tourism offers opportunities to support tourism in 'off the beaten track' locations – including rural areas - that might have experienced economic downturn as a result either of limited tourism interest or reduced tourist flows because of COVID-19 impacts.

Concerning changing patterns of demand and destinations the emerging new tourism psyche together with shifting travel mobilities is resulting in new patterns of consumer demand for particular forms of tourism products and destinations. Safety, cleanliness and hygiene management are revealed as key drivers of new consumer demand intentions. The OECD and United Nations World Tourism Organisation argue that the COVID-19 pandemic highlights more than ever the role of tourism in rural and remote areas which offer significant opportunities for recovery as with changes in consumer demand tourists look for less populated destinations and open-air experiences and activities. Based on several analyses of COVID-19 on consumer travel intentions the OECD anticipates that “nature will be explored more in the post-COVID-19 era” and that free spaces, remoteness, air purity and water freshness will gain more value for tourists leading to a significant rise of domestic tourist flows to protected areas. Nature-based areas and ecotourism are projected to increase in demand. In the (post) COVID-19 environment a highly significant role will be assumed by ‘green spaces’ as a whole and by national parks and nature reserves in particular. Overall, as a reflection of the new tourism psyche about crowdedness it is evident that natural areas “are likely to exert a stronger pull than before, with travellers and tourists seeking to avoid crowds and polluted cities”. Much evidence points to the psychological and restorative benefits of interactions with nature. Exposure acts as psychological rescue improving mental health with positive emotional benefits and most especially in terms of recovery from stress opening up potentially a large market for commercial nature tourism as a provider of ‘nature therapies’. In line with changes in consumer demand other predictions are for rapid growth in mountain tourism, nature, heritage, cultural and adventure tourism and ecotourism. Research by UNCTAD on COVID-19 impacts on the blue economy points out to growth in consumer preferences for “coastal and rural areas in a quest for contact with nature, open air and water”

For urban tourism, in the short term, the travel behaviour of visitors will change making them less willing to visit crowded places or to gather in large groups. This might reduce the volume of urban tourism or potentially change the intra-city distribution of visitors allowing cities an opportunity to spread the geographical impacts of tourism and to develop a more diverse portfolio of options including off the beaten track tours in cities. With a consumer focus on outdoor activities and eliminating their touch with others, theme parks, casinos, large museums, exhibitions and integrated resorts are likely losers in relation to parks, beaches and rural tourism activities. A caution must be sounded from research conducted in terms of the sustainability of a strategy for promoting domestic tourism to revive local tourism economies and build destination resilience in the global South. Interviews conducted concerning the perception of domestic travellers point to the limits of such a strategy as a recovery option for African tourism because of issues of affordability of leisure tourism products for the domestic market. Unwillingness of domestic travellers to pay premium prices and affordability thus are core issues that need to be considered in the African context.

A major directional change which is linked to COVID-19 and the new psyche is the shift towards what is termed 'untact' tourism. The term untact means 'undoing contact' and therefore doing things without direct contact with others. It is viewed as a new customer service strategy for the digital era and linked to the contactless economy. Untact is most highly developed in Japan and Korea and gaining increasing traction in Australia. Tourism enterprises are re-designing experiences (e.g. winery experiences, museum visits, tours, sports events, in-room dining and entertainment instead of hotel facilities) to feature smaller groups of tourists, outdoor activities and/or private experiences complying with social distancing and gathering restrictions and travellers' expectations. The term 'untact tourism' is becoming popular in South Korea to describe a new form of travelling that prioritizes social distancing by avoiding crowded places and indoor activities. The term is applied to any travel destination or tourism experience which is designed to facilitate social distancing and reduce the potential spread of COVID-19. Arguably, tourism policymakers and practitioners must consider untact tourism as an emerging new paradigm that accommodates individuals' need to minimize their perceived risks as well as satisfy their need to travel. It is not the mere removal of service encounters but, in fact, could be a premium service based on a high level of customization. Untact must be understood as a health-protective behaviour aimed at minimizing human contact and therefore to cope with COVID-19 risk perceptions. It offers opportunities for enacting policy interventions to shape tourism sector supply and demand in order to meet the needs and demands of tourists in the continuing COVID-19 environment. One example would be flexible demand management via installation of population sensors centred on major tourism attractions to provide real time information on the congestion and density at particular places and thus to reduce density and increase social distancing.

In terms of recommendations these emerge from both the demand and supply-side research. From the demand-side eight specific recommendations are offered which point to opportunities for interventions to shape tourism sector demand and supply.

1. The Department of Tourism recognise the potential growth of drive tourism and initiate a set of policy interventions to support a window of opportunity that exists currently for supporting this particular form of domestic tourism.
2. The Department of Tourism improve the awareness of local governments in rural and remote areas – most especially those with tourism products around nature tourism – of a vital window of opportunity to market those attractions around 'natural open space', 'tranquillity' and 'seclusion' to potential domestic tourists.
3. The Department of Tourism launch a monitoring study of the impacts of potential expansion of domestic tourism flows into protected areas especially in terms of ensuring their long-term sustainability as spaces for improving physical and emotional wellness and mental health.
4. It is recommended that the Department of Tourism launch a research investigation into the experiential components and commercial design for different market segments of such nature forms of tourism.
5. For city tourism the Department of Tourism is recommended to undertake an investigation into opportunities to develop new products such as creative tourism and off the beaten track tours in order to support the visitor economy of cities as well as increase the geographic spread of tourism impacts in South Africa's major cities.
6. In relation to popular tourism attractions – whether in cities or national parks – it is recommended that the Department of Tourism support the installation of technologies in respect of flexible tourism demand management for gathering real-time data in order to enact control measures to minimize congestion and to maximise social distancing.
7. It is recommended that the Department of Tourism liaise with other government departments involved in Operation Phakisa and the Oceans Economy in order to urge the abandonment of plans for building new cruise ship terminals.
8. With a view to promoting a movement towards 'untact tourism' in South Africa it is recommended that the Department of Tourism expand the awareness of tourism businesses and of local governments of the potential and importance of best practices relating to safety and cleanliness, the growth of the contactless economy, and foster an ecosystem of tourism services centred around the concept of untact.

From the supply-side research there emerged the following five additional recommendations.

1. The evidence from the three case studies confirms the fragile financial state of tourism enterprises which is the result of COVID impacts and exacerbated by government lockdown regulations, such as alcohol bans and beach/swimming pool closures. Although government

financial assistance to support enterprises is not expected in relation to current direction of policies a strong case exists for extending government financial assistance to workers in tourism and hospitality establishments. The supply-side findings point to the recommendation that the Department of Tourism make the case for an extension of TERS for workers in the debilitated tourism and hospitality sector.

2. Another common theme across the evidence from all the supply-side research is that opportunities for the domestic tourism market are eroded by the existence of a “fear of travel” amongst a segment of the South African population. This fear of travel exists despite the legislated requirements for and commitment of the overwhelming majority of local tourism and hospitality establishments to all COVID-19 protocols. The studies disclose evidence of what is a South African form of untact tourism. It is recommended that the Department of Tourism launch an immediate and energetic marketing campaign (to save the Easter season) with the messaging about the safety of tourism establishments and commitments to high standards of hygiene and personal safety.
3. The research confirms the significance of drive tourism for South African domestic travellers but that in certain parts of the country major shortcomings exist in respect of quality of road infrastructure, signage and maintenance of roads. In addition to exploring opportunities that exist with the growth of drive tourism for remoter and peripheral areas it is recommended that the Department of Tourism ensure that as part of the President’s commitment to new infrastructure projects that road infrastructural projects linked to existing tourism nodes are prioritised.
4. The research disclosed the immediate threat of the potential loss of tourism product base and of tourism skills in many parts of South Africa. As the impending closure of these tourism businesses, most especially in tourism-dependent areas, will impact local employment and livelihoods it is recommended that the Department of Tourism launch an investigation into the impacts of tourism establishment closures on local communities with the need for the appropriate planning of exit strategies from tourism and correspondingly training/reskilling of communities for non-tourism livelihoods.
5. Finally, the research revealed evidence of a disconnect between the majority of tourism product owners and government as a whole and with the Department of Tourism in part because of lack of clear communication from government with the sector. The consequence is a lack of trust which is reinforced by a perceived lack of personal engagement with the sector. In moving forward with any proposed partnerships with the private sector it is recommended that the Department of Tourism improve its communications and institute closer engagements with established tourism businesses in order to rebuild trust in the sector as a whole.

In conclusion, considerable international evidence already exists of shifts in consumer demand and in the character and patterns of domestic tourism which is occurring in North America, Europe and Australia. Arguably, certain other changes may emerge in the unforeseeable future. COVID-19 can be expected to have far-reaching impacts on domestic tourists' consumption behaviour. Notwithstanding the potential for vaccines, the lingering impacts of the pandemic on the tourism psyche will ensure that a return to the pre-COVID-19 normal should not be taken for granted. In the context of the global South where only limited research has been conducted it must be appreciated the volume of future domestic tourism demand will be related closely to the performance of the national economy. Arguably, under conditions of low or no economic growth, which are exacerbated by COVID-19 impacts, the potential will be reduced for expanding demand for *any* tourism products. With this critical caveat, it is argued that the analysis and findings from this research investigation provide the foundations of an evidence base to inform the Department of Tourism of policy opportunities in order to shape the tourism sector's supply and demand for meeting the needs and changing demands of South African domestic tourists in the COVID-19 environment.

1. Introduction and Background

The 2020 COVID-19 pandemic is “the third and greatest economic, financial and social shock of the 21st century after 9/11 and the global financial crisis of 2008” (OECD, 2020a: 3). The outbreak of the COVID-19 pandemic has been labelled as a ‘black-swan event’ and even likened to scenes reminiscent of World War Two as it precipitates turmoil across the world economy with adverse implications across nearly all sectors of activity and life (Hamidah et al., 2020; Nicola et al., 2020). The hospitality and tourism sector, including commercial aviation, has experienced amongst the worst socio-economic impacts of the pandemic (Dube et al., 2020; ILO, 2020; Jamal and Budke, 2020; Ma et al., 2020; OECD, 2020b; Wen et al., 2020). Within a period of only a few months, “the framing of the global tourism system moved from overtourism to ‘non-tourism’” (Corbisiero and La Rocca, 2020:95). As emphasised by Gossling et al. (2020) its worldwide spread is not only causing a global crisis for hospitality and tourism but also dramatically changing consumers’ wants and market demands that were satisfied by existing tourism value chains and business models during the pre-COVID-19 era. Several scholars view the pandemic as a transformative opportunity for the tourism sector as well as for a resetting of tourism research agendas (Brouder, 2020; Carr, 2020; Gössling et al., 2020; Hall et al., 2020; Higgins-Desbiolles, 2020a, 2020b; Niewiadomski, 2020; Rogerson and Baum, 2020; Sigala, 2020). For example, pointing out that the neoliberal version of globalisation is associated with environmental devastation, economic inequality and excessive global travel, Goffman (2020: 48) maintains that the “pandemic provides opportunities for a new kind of glocalization in which people live far more local lives than in recent decades but with greater global awareness”. The vision for some observers is that the tourism sector be reoriented and should sit within a sound economy and society that is geared towards social and ecological well-being (Higgins-Desbiolles, 2020a; Ioannides and Gyamóthi, 2020).

At its core the tourism sector is reliant on mobility and sociability, the two things that COVID-19 has undermined. As Butcher (2020: 27) observes “social distancing diminishes the pleasure of a holiday to the extent that many may choose to stay home”. Accordingly, the tourism sector, including commercial aviation, has experienced amongst the worst socio-economic ramifications of the pandemic (Butcher, 2020; Dube et al., 2020; Gursoy and Chi, 2020; ILO, 2020; OECD, 2020a; UNCTAD, 2020). Assaf and Scuderi (2020: 731) observe that for tourism COVID-19 “has been one of the most impactful and tragic pandemics of modern times”. Arguably, the COVID-19 pandemic ushers in “an era of major change of the equivalent of a world war or great depression” (Higgins-Desbiolles, 2020a). Its various health communication strategies and measures, such as social distancing, lockdowns, curbs on crowding and travel restrictions, have generated a crisis that Sigala (2020) styles as of “economised societies rooted in the growth paradigm". The pandemic is unlike many other disasters and crises that previously have impacted the tourism sector as a whole (Hall et al., 2020) and urban tourism in particular (Panasiuk 2019). Seemingly, there will no return to the 'normal' as existed before (Brouder et al., 2020; Gössling et al., 2020; Lew et al., 2020). According to certain observers, the pandemic "can constitute a paradigm shift in research on tourists' behaviour and decision-making" because "what was previously taken for granted may not hold in the COVID-19 era" (Kock et al., 2020: 2).

In looking forward, Saarinen and Wall-Reinius (2021) identify the consolidation of two differing narratives or schools of thought in the raging contemporary tourism debates about COVID-19. Both narratives highlight the seriousness of the COVID-19 pandemic for global tourism, albeit they differ in terms of what comes or should come next. First, is a 'resilience school of thought' which stresses the historical capacity of the tourism sector to cope with or adapt to shocks such as the global financial crisis, SARS, or natural events such as earthquakes or tsunamis (Saarinen and Wall-Reinius, 2021: 145). The emphasis is upon the sector's capacity to return to pre-crisis growth paths. This perspective is one which is projected by much of the tourism industry and the majority of national governments including the Department of Tourism in South Africa. Second, is a 'readjustment school of thought' which emphasizes the need to re-think the growth at all cost and volume at all cost path for tourism which has dominated in recent years and in part is responsible for the current crisis (Saarinen and Wall-Reinius, 2021: 146). For this second school COVID-19 is a watershed or turning point for tourism and projects that its impacts will be irreversible as it will fundamentally shift the nature of tourism and human mobility into the future (Higgins-Desbiolles, 2020a; Sigala, 2020). Carr (2020: 30) avers that the COVID-19 pandemic represents "an opportunity to re-envision our economies, possibly accelerating governments' responses to environmental practices that have negatively impacted nature".

2. Rationale of the Study

In common with the rest of the world, the tourism sector of South Africa experienced the radical impacts of COVID-19 (Rogerson and Rogerson, 2020a). Indeed, as is the situation across the world the pandemic represents a crisis event that potentially is set to transform South Africa's tourism sector as well as the context in which it functions. The unfolding negative effects of the pandemic are evidenced in the tourism industry surveys conducted by the Department of Tourism, Tourism Business Council of South Africa and International Finance Corporation (2020a, 2020b, 2020c).

Undoubtedly, the magnitude of the pandemic will reshape existing patterns of tourism demand and supply which need to be understood and researched for designing appropriate policy interventions. Suggestions for recovery strategies put forward by the international Tourism Research Network include focused marketing initially for domestic and regional markets as well as giving attention to the local MICE sector (Bieger and Laesser, 2020). In addition, it suggests the need to encourage visiting friends and relatives (VFR) travel in order to build traffic and link with resident needs to visit family following lockdowns (Hall et al., 2020). It is argued local residents should be encouraged to visit local attractions because of their awareness of the local epidemic situation and so might be more confident to have some tourism-related activities with family in local areas (Bieger and Laesser, 2020). Localism and the development of a more localised form of travel is likely to be a significant theme within successful tourism recovery strategies (Higgins-Desboilles, 2020a; Peters et al., 2020; Tomassini and Carvagnaro, 2020). The encouragement of VFR travel is viewed widely as an early recovery post-disaster tourism strategy for destinations (Backer and Ritchie, 2017). In a strong endorsement of this stance on the basis of Australian research Peters et al. (2020: 13) stress that an early focus on this segment is warranted as "the Visiting Friends and Relatives market is ideally placed to address the social disconnect and tourism challenges resulting from COVID-19".

Overall, most international scholars are of the opinion that destination recovery must begin with domestic markets and followed by regional tourism markets (Gössling et al., 2020; Rogerson and Baum, 2020). The assurance of the safety of tourists is stressed as of paramount significance for re-activating tourism as shown by recent investigations of visitor intention to travel (Turnšek et al., 2020). Several national governments and international organisations – most notably the United Nations World Tourism Organisation (2020) – currently are conducting research on best practice for reviving the tourism industry and in particular with a specific focus on domestic tourism as a basis for tourism recovery. As argued by Nyaupane, Morris and Li (2020: 2) "domestic tourism has played an important role in the economic recovery of tourism after previous outbreaks, such as SARS, MERS and Ebola, natural disasters, and terrorism and conflict". Moreover, as compared to international tourism it is acknowledged that domestic tourism rebounds more quickly and can bring much-needed relief to a nation's tourism sector and especially for small and medium-sized tourism businesses which constitute the majority of tourism enterprises.

3. Problem Statement

As Butler (2020: 663) points out the "sudden severe decline of tourism because of restrictions imposed on travel in response to the Covid-19 pandemic creates opportunities and problems for all segments of the tourism industry and its customers". As some destinations are opening their borders for travel the residual fear associated with the COVID-19 outbreak or similar diseases may lead tourists to avoid crowded and popular destinations (Wen et al., 2020). It is well documented that domestic tourism will recover much sooner than international tourism reflecting the closed international borders and uncertainty about the safety of long-distance air travel (UNWTO, 2020a). At this time, therefore, there is an international agreement that options for boosting domestic tourism can provide many destinations an accessible means of travel as many countries continue with lockdowns in the face of COVID-19 (UNWTO, 2020a).

In common with the rest of the world the tourism industry of South Africa has experienced the debilitating impacts of COVID-19. Undoubtedly, the magnitude of the pandemic will reshape existing patterns of tourism demand and supply which needs to be understood and researched for designing appropriate policy interventions. In South Africa, the Tourism Recovery Action Plan for tourism sector acknowledges the severity of COVID-19 pandemic on the sector as a result of the halt of tourism activities and businesses shutting down operations (South African Tourism, 2020). The Department of Tourism in South Africa predicts that international travel is likely to resume in 2021 and anticipates recovery to commence at domestic level. As such, domestic tourism is recognised as a beacon of hope and a catalyst for the recovery of the tourism sector as it reopens gradually post COVID-19. This optimistic view on the domestic sector necessitates that the country's role players reflect on opportunities and challenges that lie ahead to shape the sector's supply and demand in order to meet the needs of future domestic tourists. On this issue a knowledge gap exists and therefore research is required to understand how COVID-19 has affected the supply and demand of tourism products in South Africa. This is essential to devise interventions that might address the needs of future tourists, particularly domestic tourists, post COVID-19.

4. Purpose of the Study

The unfolding negative effects of the pandemic are evidenced in the tourism industry surveys conducted by the Department of Tourism, Tourism Business Council of South Africa and International Finance Corporation (2020a, 2002b, 2020c). It is against the background of the rolling COVID-19 pandemic, its devastating impacts for tourism and initiatives for re-igniting demand focused on domestic tourism that this research is being undertaken.

The purpose of the study is to assess the impact of COVID-19 on the demand and supply of tourism products, with a view to propose interventions to meet the needs of tourists post-COVID-19 through the approach of undertaking case studies of local destinations which offer a differing mix of tourism products.

5. Research Questions

- What has been good international practice for encouraging domestic tourism in the COVID-19 environment?
- What are South Africa's most tourism-dependent localities in South Africa that can be used for case study analysis?;
- What are the possible effects of COVID-19 on the demand for tourism products?;
- What are the possible effects of COVID-19 on the supply of tourism products ?;
- What are challenges that may affect the tourism sector of South Africa in order to meet the needs of tourists post-COVID-19 ?; and,
- Are there opportunities that may arise to shape the sector's supply and demand in order to meet the needs and demands of (mainly) domestic tourists?

6. Objectives of the Study

The objectives of the investigation are as follows:

1. To conduct as background a literature scan/survey of international debates and practice on initiatives for revival of domestic tourism post-COVID-19;

2. To identify tourism-dependent localities in South Africa for case study analysis;

3. To examine possible effects of COVID-19 on the demand for tourism products;

4. To analyse possible effects of COVID-19 on the supply of tourism products;

5. To assess challenges that may affect the sector in order to meet the needs of tourists post-COVID-19; and,

6. To assess opportunities that may arise to shape the sector's supply and demand in order to meet the needs and demands of (mainly) domestic tourists.

7. Theoretical Context and Literature

In a rich rapid assessment of initial evidence about international COVID-19 impacts Gössling et al. (2021) maintain that the COVID-19 pandemic should lead to a critical reconsideration of the global volume growth model for tourism, for interrelated reasons of risks incurred in global travel as well as the sector's contribution to climate change. Challenging the pre-COVID-19 view that more arrivals automatically equates to greater benefits for destinations Gössling et al. (2021) call for the global tourism system to be re-oriented towards addressing the United Nations Sustainable Development Goals (SDGs) instead of towards "growth as an abstract notion benefiting the few" (Gössling et al., 2021). It is contended that as a result of "the magnitude of the COVID-19 pandemic, there is an urgent need not to return to business-as-usual when the crisis is over, rather than an opportunity to reconsider a transformation of the global tourism system more aligned to the SDGs" (Gössling et al., 2021). Other scholars offer similar messages. Niewiadomski (2020) states that despite the huge price the world is paying for COVID-19 the temporary de-globalisation that is under way offers the tourism industry an opportunity to 're-boot' in line with the requirements for sustainability and at the same time shed its darker side in terms of economic exploitation, environmental degradation and exacerbating global climate change. Prideaux et al. (2020) maintain lessons that are emerging from the pandemic can be applied to strategies for dealing with climate change, in particular the concept of 'flattening the curve'.

Reflecting on the need to reconsider global mobility Renaud (2020) proposes alternative tourism development pathways which are aligned to the principles of deglobalisation and degrowth of the industry. For tourism transformation to occur Benjamin et al. (2020) call for an actionable commitment to equity, Gretzel et al. (2020) for transformative e-Tourism research, Stankov et al. (2020) for more 'mindful' consumers, and Carr (2020) for the incorporation of diverse cultural values, including from indigenous peoples, in order to ensure more equitable tourism futures. Everingham and Chassagne (2020) advocate a shift away from capitalist growth models for tourism and instead redirecting priorities away from simply economic growth and instead towards enhanced environmental and social well-being. Brouder (2020) considers that the key concepts of evolutionary economic geography, such as path dependence/creation, can shed insight about variations in pathways for tourism in a post-COVID world. It is suggested that a path leading to the transformation of tourism is realizable if sufficient institutional innovation occurs on both the demand and supply sides of tourism (Brouder, 2020). Cheer (2020) proposes the concept of ‘human flourishing’ as an alternative touchstone for evaluating tourism’s impact on host communities. The potential transformative opportunities associated with COVID-19 are debated further by Higgins-Desbiolles (2020b) and by Hall et al. (2020). Key players in the tourism industry are keen for a rapid return to business-as-usual and appealing for support through government stimulus packages. For critical tourism scholars, however, the crisis offers a “transformational moment” and an opportunity to ‘re-set’ tourism away from a growth at all cost model and rather to shape the sector in order to better address the objectives of inclusivity, sustainability and responsibility (Hall et al., 2020). This shift is echoed in the work of Ioannides and Gyamóthi (2020) who view the crisis as an opportunity to escape the pre-COVID unsustainable trajectory of global tourism.

In recent publications various lenses and perspectives have been applied to investigate the impacts of the COVID-19 pandemic on tourism and hospitality. These include environmental distress (Crossley 2020), human rights (Baum and Nguyen 2020), mobilities (Iaquinto, 2020), media analysis and communication (Seraphin and Dosquet, 2020; Wen et al., 2020; Yu et al., 2020; Zheng et al. 2020) global versus local approaches (Brouder et al., 2020; Higgins-Desbiolles, 2020b; Jamal and Budke, 2020; Niewiadomski, 2020; Romagosa, 2020; Tomassini and Carvagnaro, 2020), sustainability (Corbisiero and La Rocca, 2020; Galvani et al., 2020; Jones and Comfort 2020) as well as technology and the fourth industrial revolution (Gretzel et al., 2020; Seyitoĝlu and Ivanov, 2020; Sigala, 2020a; Zeng et al., 2020). Inter-disciplinary and integrated studies also have flourished to add further rich insights on the ramifications of the COVID-19 pandemic for the tourism sector (Aliperti et al., 2019; Brouder, 2020; Lew et al., 2020; Naumov et al., 2020; Rogerson and Baum, 2020). Zenker and Kock (2020) issue a call for tourism researchers to transcend impact studies and rather to interrogate deeper underlying relationships and how these – such as tourist behaviour or destination image - might shift as a result of the coronavirus pandemic.

The value of pursuing inter-disciplinary research collaboration to address the challenges posed by the pandemic has been highlighted (Wen et al., 2020). A think tank related to the Switzerland-based International Association of Scientific Experts in Tourism (AIEST) identified an array of different innovative actions that might be pursued by the accommodation services sector as a business response to COVID-19 (Thomas and Laesser, 2020). Such actions are delineated from their domains of potential functionality or represent an extension or modification of core services. Accommodation service providers in several European countries are discovering their businesses and lodging properties can have additional functionalities. These include as temporary living quarters for health workers, as quarantine locations with associated services, 'sick' stations for patients with infection but only mild illness, as hospital extensions for low risk patient outplacements or even as workplaces for people who must work remotely but cannot do so from their home environment (Thomas and Laesser, 2020). The overall trend is to acknowledge accommodation businesses incorporate both an infrastructure and service component. These can be adapted and applied innovatively in different contexts such as the physical infrastructure of the hotel being used with different functionality and value as health stations.

It is certain that in terms of mobility restrictions imposed in relation to coronavirus, international travel will be the last to be reactivated. For most countries it will be linked to the appearance of a vaccine and its mass availability (Hall et al., 2020). Tourism as we have known it in the pre-COVID-19 years will be a thing of the past and maybe even a research focus only for curious historical tourism scholars (Bieger and Laesser, 2020). Nevertheless, it is inevitable that some form of tourism will re-emerge, albeit different in character to the 'normal' of the pre-COVID-19 tourism economy. As an example, grounded business travellers are beginning to concede that virtual business meetings and even virtual conferences can be held on a satisfactory basis. Conferences as events may therefore be reduced in significance. Richards and Morrill (2020) emphasize that the youth travel sector faces considerable challenges in adapting to the 'new normal' and will have to re-model existing backpacker hostels in order to meet requirements for social distancing. In re-imagining a post-viral tourism world, solutions and pathways to recovery inevitably will vary sector-by-sector and destination-to-destination. Prideaux et al. (2020) consider that in the short-term the post-COVID-19 recovery of tourism will be tied to the pace of global economic recovery. However, long-term recovery "will overlap with the transformation of the current linear economic production system into a carbon-neutral economic production system and set new parameters for the future direction of global tourism recovery" (Prideaux et al., 2020: 668).

Overall, whilst crises in tourism are a regular occurrence and many destinations even have developed tactics and strategies of resilience the COVID-19 pandemic is viewed as different and unique because of its dramatic spread and occasioning of widespread collapse as well as for its potential for reshaping many segments of tourism demand and supply (Kreiner and Ram, 2020; Gössling, Scott and Hall, 2021). Understanding tourism behaviour during and after major crises such as COVID-19 therefore is an essential element for planning destination recovery (Golets et al., 2020). COVID-19 reaction policies have had the effect of putting the tourism industry into a form of forced hibernation (Bausch et al., 2020).

Currently tourist behaviour and intention to travel as well as destination perceptions are dictated by pandemic-related health concerns.

8. Research Design and Methodology

The research seeks to determine COVID-19 opportunities for shaping sectoral supply/demand and challenges to meet the needs of (mainly domestic) tourists post-COVID-19 through TWO sets of work which relate respectively to **DEMAND-SIDE** and **SUPPLY-SIDE** issues. Both demand and supply-sides of analysis are of equal significance for this project. It must be understood that the study is NOT focussed on the specific challenges of particular forms of tourism (such as backpacker tourism, rural tourism, food tourism etc) but an exploration of the supply/demand issues and challenges ACROSS a range of different forms of tourism by looking through the lens of three selected case study destinations where there is an urgent need for local enterprises to respond to the COVID-19 crisis because of the dependence of those localities upon the tourism sector.

The research design combines desk-top surveys and qualitative interviews. The desk top surveys were driven by a search for best policy practice and for relevant investigations that inform the study objectives. Qualitative data collection was conducted by in-depth interviews undertaken through a mix of telephonic and in person interviews with due respect to COVID-19 safety issues. Key stakeholders in each of the three case study areas were targeted to obtain the information necessary to achieve the study's objectives. All interviews were semi-structured, as this interview type allows for the extraction of consistent information across respondents, while allowing respondents to discuss freely and in detail, the unique aspects related to their processes. It also allows for follow up questions by the researcher to further interrogate topics and issues of interest.

9. Demand-Side Research

The demand-side focus was pursued through undertaking a desk top review of what has been described as a 'tsunami' of research studies undertaken/are currently being pursued on COVID-19 and consumer travel intentions in various parts of the world (Bausch, Gartner and Ortanderl, 2020; Korinth, 2020; Persson-Fischer and Liu, 2021). Since lockdowns began in March 2020 a large number of investigations using online surveys of travel intentions have been done by several different international organisations as well as by others working on behalf of national tourism agencies. In addition, there has been a major burst of academic studies similarly using online surveys to examine aspects of possible changes in consumer demand in relation to COVID-19.

In terms of international organisations useful reports discussing demand-related issues and travel intentions across a range of countries have been prepared by or on behalf of the European Commission (Marques Santos, Madrid Gonzalez, Haegeman and Rainoldi, 2020) and the Organisation for Economic Cooperation and Development (OECD, 2020a, 2020b). In addition, the office of the United Nations Secretary General released a report which addresses issues of changing demand (United Nations, 2020). The United Nations Conference on Trade and Development (UNCTAD, 2020) focuses on the pandemic's impact on coastal and marine tourism as part of the wider blue economy. The Switzerland-based tourism association, AIEST, has compiled a report from the experiences of 26 countries the majority in Europe (Bieger and Laesser, 2020). The most detailed individual country studies are those which are available for China, USA and United Kingdom. For China the international consultancy firm, McKinsey & Company surveyed 1600 travellers in eight cities about their attitudes towards leaving home for leisure travel as the first wave of a broader COVID-19 Travel Sentiment Survey (Chen, Enger, Yu, and Zhang, 2020). In USA MMGY Travel Intelligence team on behalf of US travel association conducts a bi-weekly tracking survey (1200 adults) to monitor the impact of COVID-19 on the travel intentions of US business and leisure travellers. This survey is measuring current and future traveller sentiment amidst the COVID-19 pandemic and tracks trends and shifts in travel intentions. The study polls respondents for both domestic and international travel intent by purpose and type. In the United Kingdom the national tourism agency, Visit Britain, undertakes a weekly COVID-19 consumer sentiment tracking survey (at least 1500 adults in England with 'boosts' for Scotland and Wales) to understand domestic intent to travel with particular focus around current barriers and concerns. The survey addresses the likelihood of travel, when and where people plan to go; trip details such as accommodation type, activities undertaken, and type of reassurances sought from the tourism sector (Visit Britain, 2020).

Beyond these regular monitoring studies there has been an avalanche of academic research undertaken in 2020 to understand the changing demand side of tourism under the impact of COVID-19. These rapid assessment investigations once again mainly employ online surveys through social media to collect data from large numbers of respondents on their intentions to travel. In one study the research was conducted applying big data analysis to text mining of information which was collected from social media (Sung et al., 2021). By conducting a scan of material and of published studies through Google Scholar it is evident that academic research on consumer demand is available for over 20 countries as is shown on Table 1.

Table 1: International Academic Research Studies on COVID-19 and Consumer Demand

Country	Research Study
Algeria	Madani, Boutebal, Benhamida, and Bryant 2020
Australia	Beck and Hensher, 2020; Butler, 2020; Butler and Szili, 2020; Flinders University, 2020; Sigala, 2020
Austria	Neuburger and Egger, 2020
Brazil	Golets, Farias, Pilati and Costa, 2020
Bulgaria	Ivanova, Ivanov and Ivanov, 2020
China	Hong, Cai, Mo, Gao, Xu, Jiang and Jiang, 2020; Li, Nguyen, and Coca-Stefaniak, 2020; Maltseva and Li 2020; Wen, Kozak, Yang and Liu, 2020; Zhan, Zeng, Morrison, Liang, and Coca-Stefaniak, 2020; Zhu and Deng, 2020
Czechia	Vashar and Štastná, 2020
Egypt	Elsayeh, 2020
Germany	Neuburger and Egger, 2020
India	Das and Tiwari, 2020
Indonesia	Kusumaningrum and Wachyuni, 2020; Wachyuni and Kusumaningrum, 2020; Yuni, 2020
Italy	Peluso and Pichierri, 2020
Malaysia	Ahmad, Jamaludin, Zuraimi, and Valeri 2020; Awan, Shamim and Ahn, 2020; Nasir, Nasir, Nasir, and Nasir, 2020
Poland	Kowalska and Niezgoda, 2020; Korinth, 2020; Wojcieszak-Zbierska, Jęczmyk, Zawadka and Uglis, 2020
Portugal	Silva, 2021
Serbia	Perić, Dramićanin and Conić, 2021
Slovenia	Turnšek, Gorenak, Brumen, Mekinc, Rangus and Štuhec, 2020
South Korea	Bae and Chang, 2020; Jeon and Yang, 2021; Sung, Kim, and Kwon, 2021
Spain	Sánchez-Cañizares, Cabeza-Ramírez, Muñoz-Fernández and Fuentes-García, 2020
Switzerland	Neuburger and Egger, 2020
Turkey	Jafari, Seydam, Erkanli and Olorunsola 2020; Kement, Çavoşoğlu, Demirağ, Durmaz, and Bükey 2020; Özdemir and Yildiz, 2020
USA	Canina and McQuiddy-Davis, 2020; Craig, 2020
Zimbabwe	Woyo, 2021

Source: Authors

Finally, there are other pertinent academic studies related to specific issues about consumer demand and behavioural changes around current and post-COVID travel intentions. These are available on the following themes, *viz*., travel risk perception and mitigating the effects of perceived risk (Matiza, 2020; Turnšek et al., 2020; Perić et al., 2021); the new tourism psyche (Kock, Nørfelt, Josiassen, Assaf, and Tsionas, 2020; Kuhn, Kock and Lohmann, 2020; Zenker and Kock, 2020; Zenker, Braun and Gyimóthy, 2021); the contactless economy and 'untact' tourism (Bae and Chang, 2020; Lee and Lee, 2020); and, specific implications for nature tourism, protected areas and outdoor recreation (Buckley, 2020; Buckley and Westaway, 2020; Craig, 2020; Spalding, Burke and Fyall, 2020), and, for China the particular influence of traditional Chinese medicine (Wen, Yang and Kozak, 2020).

Overall, in terms of this expanding academic literature the richest available material at present is that pertaining to Australia, China, South Korea, UK and USA. Taken together the results from these accessed studies undertaken across 23 different countries (including three from Africa) by international agencies, national tourism bodies as well as academic investigations reveal an emerging consensus on the shifting demand side of domestic tourism in the COVID-19 environment. As a whole they reveal several themes which are common across countries in terms of risk perceptions and consumer travel intentions as well as of changing demand preferences in the context of the risks associated with travel in the continuing COVID-19 crisis. The findings from this desk-top research give essential insight into domestic tourist demand behaviour in the COVID-19 era.

10. Supply-Side Research

The **supply-side** of the research was done through the approach/lens of undertaking **case studies of local destinations** each of which offers a differing mix of tourism products and thus of challenges/opportunities.

Within the timeframe of the study **THREE** locality case studies were undertaken.

In selecting the case study destinations, the proposed focus was upon localities that are strongly tourism-dependent and thus are destinations where the need for strategic support interventions would be most urgent. The selected destinations were determined by undertaking an analysis of the IHS Global Insight data base 2018 data to determine the country's most tourism dependent localities. The three case studies were situated in different provinces of the country and include two destinations close to large metropolitan areas as source markets.

- For each of the three case studies QUALITATIVE interviews were undertaken with key private sector tourism product owners with an interview schedule designed to determine the issues of

COVID-19 impacts including key indicators to measure the impact of COVID-19 at the local destination, responses of enterprises, their challenges and potential support requirements/interventions to address any opportunities in relation to domestic tourism.

- In each study the readiness of the supply-side was examined by how businesses are responding to the demand needs of domestic tourists. For each of the three case studies, a maximum 20 semi-structured interviews was conducted with a cross-section of tourism product suppliers. The cross-section of product suppliers was drawn from an internet-mediated audit of existing tourism products and accommodation service products in each of the three destinations under investigation.
- Themes in the interviews include: (1) tourism product/length of business establishment and impact of COVID-19 on enterprises; (2) challenges faced by firms in the COVID-19 environment; (3) importance of domestic tourism and perception of new domestic tourism opportunities; (4) supply-side responses (enterprises) with existing products; (5) changes (if any) made or planned by firms towards new products to supply the domestic tourism market; (6) cooperative actions with local enterprises; and, (7) suggested interventions that might assist businesses to better address anticipated demands of domestic tourists in the continued COVID-19 environment and thereafter.
- Interview material was analysed through content thematic analysis. A content analysis approach was employed to interrogate the transcribed qualitative interview data. Content analysis entails the categorisation of the interviews based on assigned codes, which are further aggregated into emerging themes from the data and provide key results for analysis. Through this type of data analysis, the critical questions of this study can be answered and study objectives fulfilled. This process entails organizing the data, following transcription, based on the responses generated from the different interviews. The thematic approach applied followed the approach as suggested by Braun and Clarke (2006).
- The interpretative framework for the case study interviews draws upon the most notable on coping strategies and adjustments of tourism firms as put forward is the rich multi-country exploratory study by Duarte Alonso et al (2020).
- The interview schedule is Appendix A.

11. Addressing Study Research Objectives

Table 2 below summarises how the research objectives of the study were achieved, research methods to address each objective and justification for the method used.

Table 2: Project Objectives and Methods: Summary

Research Objective	Method	Justification
Understand international debates and good practice on initiatives for revival of domestic tourism	Desk top review – sources through Google Scholar and search of reports by major international agencies	This is standard approach used in all international research
Identify tourism-dependent localities for case analysis	Analyse IHS Global Insight data for 2018	The IHS Global Insight base provides local level data that is not available from any other source
Examine possible effects of COVID-19 on demand.	Desk top review – international policy and academic studies as indicated	Since March 2020 hundreds of thousands of individuals have responded to online surveys. This DEMAND-side analysis draws together the common findings emerging from this research.
Analyse possible effects of COVID-19 on supply of products by tourism enterprises	Qualitative interviews from three case study areas	Content analysis of qualitative interviews is standard best research practice
Supply-side analysis of tourism enterprise challenges	Qualitative analysis of interviews from three case study areas	Content analysis of qualitative interviews is standard best research practice
Assess Opportunities for interventions to shape demand/supply nexus	Comparison of demand-supply findings in context of international good practice	This approach allows identification of potential opportunities for policy intervention

Source: Authors

12. The Case Study Areas

12.1 Identifying the South African Case Studies

This section presents the data analysis conducted in October 2020 based on IHS Global Insight data on tourism for 2018. The completed analysis is therefore a picture of destinations in South Africa prior to the outbreak of the COVID-19 pandemic. The analysis provides the basis for selecting our three case studies for detailed investigation. The data which is presented is on the basis of local municipalities. Table 3 provides the findings concerning the most tourism-dependent local municipalities in South Africa as indexed by the tourism spend as a proportion of local Gross Domestic Product (GDP) in 2018.

Table 3. Tourism Spend as a % of Local GDP 2018

Share	Local Municipality
>50%	Bela-Bela
41%-50%	Bitou, Knysna
31%-40%	Overstrand, Bushbuckridge
21%-30%	Okhahlamba, Nkomazi, Kopanong, Emakhazeni, Moses Kotane, Maruleng
11%-20%	Mookgopong/Modimolle, Cederberg, Saldanha Bay, Thaba Chweu, Prince Albert, Umsobomvu, KwaDukuza, Sundays River Valley, Beaufort West, Oudtshoorn, Hessequa, Cape Agulhas, Ramotshere Moiloa, Umdoni, Port St Johns, Musina, Ray Nkonyeni, Stellenbosch, Ephraim Mogale, George, Swellendam, Nkosazana Dlamini-Zuma, Mogale City, Laingsburg, Mantsopa, uPhongola, Kamiesberg, Mogalakwena, Mtubatuba, Nongoma, Umzimvubu
7.5%-10.99%	Big Five Hlabisa, Dihlabeng, Jozini, Lephalale, Mossel Bay, Kareeberg, Mohokare, Swartland, Chief Alvert Luthuli, Kou-Kamma, Joe Morolong, City of Mbombela, Ndlambe, Dr Beyers Naude, City of Cape Town, Bergrivier, Ba-Phalaborwa, Kannaland, Msinga, Dipaleseng, Ubuntu, Emthanjeni, Elias Motsoaledi, uMhlabuyalingana, Greater Giyani, Thulamela, Langeberg, Polokwane, Thabazimbi, Letsemeng, Matatiele
6.2% - 7.49%	uMngeni, Makhuduthamaga, Great Kei, Greater Tzaneen, Kouga, Nqutu, Impendle, Blouberg, Theewaterskloof, Nkandla, Ngwathe, Engcobo, Karoo Hoogland, Kai! Garib, Umuziwabantu, Hantam, Nyandeni, Setsoto, Collins Chabane, Nama Khoi, Richtersveld, Dr Pixley Ka Isaka Seme, Makana, Mpofana

Source: Based on IHS Global Insight data

The vulnerability of different local municipalities in South Africa to the effects of COVID-19 can be understood within the lens of the proportionate contribution of tourism to local GDP. This is a critical indicator as it allows a measure of vulnerability of tourism COVID-19 impacts in relation to the broader structures of local economies. Arguably, those more economically diversified urban centres (mainly the major metropolitan areas) would have greater potential resilience to the negative local effects of COVID-19. Correspondingly, those localities which are most heavily tourism-dependent in terms of highly concentrated around the tourism sector are those as a whole which are most at risk or the most vulnerable urban spaces.

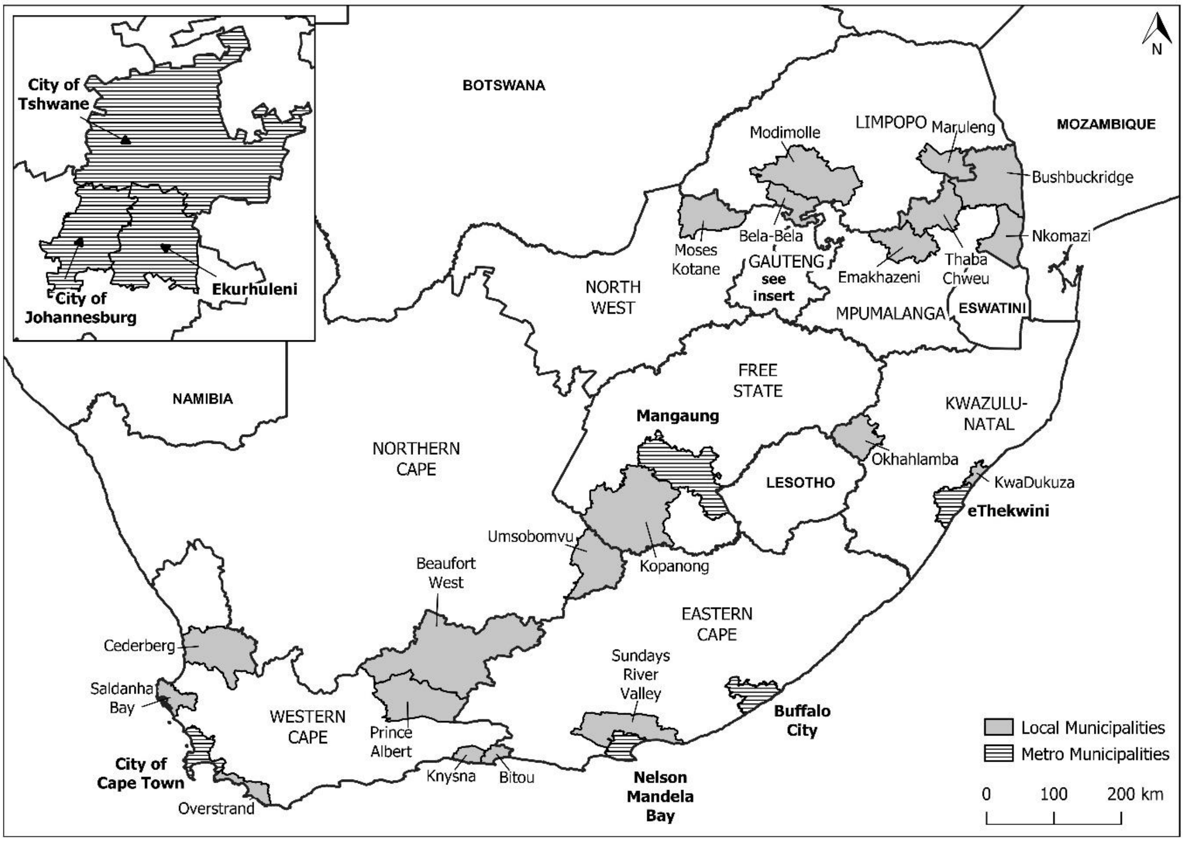

Figure 1: South Africa's 20 most tourism-dependent local governments (*Source*: Authors).

Figure 1 maps the 20 most tourism-dependent local municipalities in South Africa. The list of vulnerable urban places is dominated overwhelmingly by a number of small towns which are traditionally leisure-dominated tourism destinations such as Bela-Bela, Plettenberg Bay (Bitou), Knysna, Overstrand, the Drakensberg mountain resorts, and small towns surrounding Kruger National Park. In terms of city destinations the most vulnerable are the Cape Town metropolitan area and the secondary cities of Mbombela (gateway to Kruger National Park) in Mpumalanga, Stellenbosch in Western Cape, Polokwane in Limpopo, and Mogale City in Gauteng.

In terms of the criteria for selecting THREE case studies:

- Based on the analysis of 2018 data the selected potential case studies are (1) Limpopo – Bela-Bela; (2) Mpumalanga – Bushbuckridge; and (3) Western Cape – Overstrand.

- The two case study destinations close to metropolitan areas are (1) Bela-Bela close to the metropolitan areas of Gauteng, and (2) Overstrand which is close to Metropolitan Cape Town.

12.2 The Case Study Destinations

This section provides a brief introduction to the tourism economy of the three case study destinations which have been selected for interviews. Taken together the three case study destinations offer a wide spectrum of tourism products which allow a broad picture to emerge concerning COVID-19 impacts, enterprise responses, challenges and potential opportunities.

12.2.1 Bela-Bela

The Bela-Bela local municipality is the most tourism-dependent in South Africa with an estimated 50 % of local GDP generated by the local tourism industry. Among its leading attractions is the natural hot springs. These provided the initial impetus for tourism development in the area (Warmbaths) which can be traced back to the late 19th century when the area's first 'resort' was established. Olivier and Jonker (2013) provide evidence of early tourism to Warmbaths at the beginning of the 20th century when visitors mainly engaged in partaking mud baths rather than use the properties of the mineral springs for recreation. By the 1930s publicity material produced for South African railways was describing Warmbaths in the following manner:

> Warmbaths, sixty-four miles by rail from Pretoria, is a popular all-the-year round health and pleasure resort. The town is possessed of numerous excellent facilities for sport and recreation, but major activity is centred on the health-giving waters of the medicinal springs from which Warmbaths (Warmbad) derives its name (Carlyle-Gall, 1937: 47).

Medicinal spa tourism visits continued into the 1940s with Warmbaths renowned for its healing properties for treating chronic arthritis and gout (Rindl, 1942). The development of tourism remained limited into the 1950s because of the presence of malaria (Ferreira and Hanekom, 1995). Major change occurred only after the malaria threat was removed. The 1980s witnessed an upturn in the town's tourism base when at the time the Warmbaths economy was dominated by primary agriculture which was in decline. Tourism offered a new pathway for local development. According to Ferreira and Hanekom (1995) a burst of tourism development in the region occurred during the 1980s with the establishment of private game reserves offering opportunities for game-viewing, safari-drives and trophy hunting. This coincided also with the major renovation and expansion of the Overvaal Spa as part of Aventura resorts making Warmbaths one of the leading inland resorts in South Africa as a water-entertainment paradise (Heetderks, 2013). Boekstein (1998, 2014a, 2014b) points out that Warmbaths is one of the largest thermal spring resorts in the country with its healing waters offering water-based and treatment-based spa facilities. In parallel with international trends a marked shift at Warmbaths has been the decline in demand at the thermal springs for medical-oriented services and instead an increase in demand for facilities and services linked to family recreation or a healthy lifestyle (Boekstein, 2014c).

The Warmbaths resort traditionally has been a focus for South African domestic tourism and most especially as the pleasure periphery for the nearby metropolitan area. Metropolitan Tshwane is adjacent and Johannesburg is only two hours drive. For metropolitan residents of Gauteng Bela-Bela "with its quiet, Bushveld surroundings a perfect holiday destination close to the city" (Heetderks, 2013: 36). Improved automobilities and corresponding growth of drive tourism has been critical for expanding Bela-Bela tourism. Further product diversification occurred in the 1980s with the opening of several time-share resorts, farm resorts, additional game reserves and hunting farms. The rural landscape was refashioned as cattle owners started to move towards the exploitation of game farming, game farms and the engagement with nature reserves. In 1990 a Chamber of Tourism was formed and the first tourist festival was held resulting in the marketing of the region as a whole (Ferreira and Hanekom, 1995). As is shown by Heetderks (2013) the emergence of tourism transformed the landscape of what was a rural municipality into a popular tourism hub.

During the post-1994 period Bela-Bela has consolidated its position as a tourism destination. The racial complexion of tourists has shifted, however, as the Aventura resort (Forever Resort) changed from an exclusively white resort to attract a growing number of Black tourists. Overall, as documented by Heetderks (2013) the area has expanded its attractions for leisure visitors in search of a Bushveld escape. In addition, further growth has been occurring as a result of second homes tourism. It is argued that in Bela-Bela "tourism is prevailing and the growth of the town and most of the businesses are directly linked to the transformation of the area in a tourist destination" (Heetderks, 2013: 40). Further, it is observed that linkages with tourism afford business opportunities for catering establishments, and other hospitality venues, which have developed in and around the town and which are primarily dependent on tourist visitors. In terms of local tourism research conducted in the past decade Bela-Bela has been largely overlooked.

12.2.2. Bushbuckridge

Unlike the two other case study destinations Bushbuckridge is distant from South Africa's major metropolitan areas. The local municipality's Integrated Development Plan highlights the importance of growing the tourism sector for driving local economic development and addressing the area's chronic problems of poverty and unemployment (Bushbuckridge Local Municipality, 2017). A recent study of local economic development in this municipality confirms tourism's importance for the Bushbuckridge local economy (Nkuna, 2017). Another study points to the challenges facing small business development in the area, including for tourism enterprises (Mukwarami et al., 2020).

For Khoza (2016: 193) tourism is as yet "underdeveloped" in the Bushbuckridge Local Municipality with core challenges relating to infrastructure shortcomings, poor signage and lack of skilled labour. Nevertheless, the local municipality ranks as the fifth most tourism dependent in the country. Within the area of the local municipality the core tourism product is that of nature tourism. As Khoza (2016: 200) argues the area "has a huge ecotourism potential". The municipal area includes the Manyeleti Game Reserve, Sabi Sand Game Reserve, and Andover Nature Reserve. Within the municipality there are a wide range of accommodation service providers from, on the one hand, exclusive all-inclusive up-market safari lodges to family-friendly self-catering accommodation to, on the other hand, a range of budget accommodation providers including bush camps, caravan and camping facilities as well as backpacker hostels (Khoza, 2016). The tourism product mix contains attractions and accommodation service offerings which target both high-end international tourists as well as the domestic tourism market (Khoza, 2016). In terms of emerging market segments research by Lubbe et al. (2016) found that "Bushbuckridge appears to have the most appropriate product offerings for New Horizon families while the demand for this destination seems to be highest from the Spontaneous Budget Explorers". This indicates once again the wide spectrum of accommodation service products available in this local municipality.

12.2.3 Overstrand

The Overstrand Local Municipality is the fourth most tourism-dependent in South Africa with Hermanus its largest town. It is one of several seaside resorts that evolved in South Africa from the 19th century onwards. Its early evolution was liked to its attractions of 'champagne air', safe bathing and as one of the world's best sea-fishing locations. A watershed moment for local tourism occurred during the 1980s with the fortuitous return of Southern Right Whales to the Hermanus coast which allowed Hermanus and the surrounding towns of the Overstrand to be reinvented as an ecotourism destination and subsequently marketed as the “Whale Coast” (Rogerson and Rogerson, 2020b).

Within the Overstand cluster are several tourism destinations such as Kleinmond, Betty’s Bay, Stanford, Elgin, Bot River and Gansbaai as well as Hermanus. Beyond beaches and spectacular natural scenery the municipal area includes wine farms, numerous natural protected areas offering hiking and camping opportunities as well as an array of marine activities, most notably whale viewing and cage diving with great white sharks (Rogerson & Rogerson, 2019; McKay, 2020). Adventure tourism is of such growing significance for the municipal tourism economy that Hermanus seeks to claim the title of South Africa’s adventure tourism capital. Shark-cage diving is a popular ‘bucket-list’ item for many long-haul international tourists particularly from Europe and North America. Other adventure tourism activities in the area include canopy tours, ziplining, parasailing, sand boarding, tubing and quad biking. A major product development since 2000 has been the growth of the area’s attractions for food and wine tourism with the establishment of a number of wine routes and high-end restaurants offering food-and-wine pairings. In 2019 the Overstrand was awarded by UNESCO the status of Africa’s first Creative City of Gastronomy.

Overall, the Overstrand cluster exhibits a strong tourism economy which is heavily leisure-based and with the majority of its visitors being domestic tourists, albeit with critical reliance on international tourists for tourism spend and support of the commercial accommodation services The accommodation services economy of Hermanus includes (November 2018) eight hotels and over 150 guest houses or lodges (as well as 292 advertised Airbnb listings), caravan parks, backpacker hostels and self-catering facilities.

12.2.4 Summary of Case Studies

A summary of the case study destinations, their major tourism products and tourism dependency is presented on Table 4

Table 4: Summary of Case Studies

Province	Locality	Major tourism offerings	Source Market	Level of Tourism Dependency	Contribution to tourism to local GDP (2018)
Limpopo	Bela-Bela	Hot springs, nature tourism	Mainly domestic	High	51.5%
Mpumalanga	Bushbuckridge	Nature tourism	International and domestic	High	32.2%
Western Cape	Overstrand	Coastal tourism, adventure, gastronomy	International and domestic	High	37.2%

Source: Authors

13 Findings: Demand-Side Analysis

In reviewing the relevant international research the major findings can be discussed in terms of four core themes, namely:

- Risk Perceptions and the New Tourism Psyche;
- Travel Intentions and Changing Mobilities;
- Travel Intentions and Changing Patterns of Demand; and
- The Contactless Economy and Untact Tourism

13.1 Findings: Risk Perceptions and the New Tourism Psyche

It is widely acknowledged that 'perceived risk' will impact consumers intention to travel as well as their destination perceptions (Turnšek et al., 2020; Wen et al., 2020; Zhan et al., 2020; Perić et al., 2021). According to Neuberger and Egger (2020: 3) risk perception can be understood as "the subjective evaluation of the risk of a threatening situation based on its features and severity". For Bae and Chang (2020: 3) it is defined as individuals' perception of the probability that an action may expose them to a threat that can impact travel decisions "if the perceived danger is deemed to be beyond an acceptable level". Arguably, perceived risk is associated with a tourist's perception of uncertainty and the potential negative outcomes from the consumption of particular travel options (Matiza, 2020). Risk perception can influence an individual's behaviour and is of central concern for international travellers (Wen et al., 2020; Perić et al., 2021). It can be perceived differently based on individual characteristics (age, gender), social structures and cultural context. In addition, the role played by the media and the '(mis)info-demic' is critical for shaping public opinion and individuals risk perception (Chemli, Toanoglu and Valeri, 2020; Williams, Wassler and Ferdinand, 2020). It is argued that this is because mass media "often tends to exaggerate the risk of a situation by selectively emphasizing certain aspects while ignoring others" (Neuberger and Egger, 2020: 3).

Under circumstances of natural disaster, political instability or terrorism an increased perceived risk can result in a decrease in overall tourism demand as well as changing preferences for particular forms of tourism (Neuberger and Egger, 2020) . Perceived risk is obviously a key influence on consumer intentions to travel and choice of travel to certain destinations and avoid others (Bae and Chang, 2020). As is observed by Matiza (2020:2) "of particular interest to tourism researchers is the influence of the current public health crisis of COVID-19 on the risk perceptions of consumers and more significantly how risk perceptions will potentially influence the post-crisis recovery travel behaviour of tourists". Among several examples of research is that by Sánchez-Cañizares et al. (2020) who apply the theory of planned behaviour to interrogate the modulating effects of risk on intention to travel in the COVID-19 pandemic situation. Maltseva and Li (2020: 284) report changes in consumer preferences and the psychology of Chinese travelers under the impact of what they describe as COVID-19 stress syndrome.

Another study is that reported by Li et al. (2020) of the intra-pandemic (ie during the pandemic) perceptions as well as post-pandemic behaviour of Chinese residents within the environment of the early stages of the COVID-19 pandemic. It was disclosed that those identified as 'crisis-sensitive' tourists were more prone to shortening their post-pandemic holiday than "crisis-resistant tourists who were likely to be older, with a higher level of educational attainment and less likely to be living with dependents" (Li et al., 2020: 5). From research in Slovenia it was reported that "those who have travelled the most in the past express the least likelihood of avoidance to travel due to the COVID-19 pandemic" (Turnšek et al., 2020: 3). Existing research on the impact of perceived risk in tourism demonstrates that risk is a multi-dimensional construct and could include psychological, social and health dimensions (Matiza, 2020). Perceived risk heightens anxiety and when confronted by risk "tourists may postpone their travel plans, re-evaluate their destination choice and seek to mitigate the perceived risk or cancel their trips altogether" (Matiza, 2020: 4). In research conducted in Italy Peluso and Pichierri (2020) examine how socio-economic demographics might impact travel intention after COVID-19. It is argued that socio-economic factors do influence an individual's sense of control and perceived ability to avoid uncertainty with the elderly and those in poor health feeling less in control, unable to avoid uncertainty and with reduced intentions to travel for leisure purposes in a post-COVID-19 environment (Peluso and Pichierri, 2020). Zheng, Luo and Ritchie (2021) highlight the pandemic triggered the phenomenon of 'travel fear' and of people's responses in terms of imposing measures for self-protection as well as 'coping strategies' for post-COVID-19 travel behaviour.

Overall Kock et al. (2020: 1) make the important observation that COVID-19 "will reshuffle taken-for-granted determinants of tourism as we know it" and in addition observe that "a crucial shift is likely to occur in tourists' psyche". They maintain that whilst the pandemic might fade and travel barriers be lifted "some tourists' psyches will settle on a new equilibrium" (Kock et al., 2020: 1). Zenker and Kock (2020: 2) assert that the pandemic "can create deep marks in the tourist's thinking and feeling and change how tourists travel" as the "pathogen threat shapes behaviour in important and often hidden ways". Accordingly, for tourism researchers and policy-makers, an understanding of this altered make-up of the tourist psyche will be vital (Zenker et al., 2021). It is contended that the pandemic can represent a paradigm shift for researching tourist behaviour and decision making as it is reiterated "what was previously taken for granted may not hold anymore in the COVID-19 era"(Kock et al., 2020: 2).

At least six specific issues around the new tourism psyche have been highlighted. First, is that exposure to a disease threat can make people more 'collectivistic' by giving preference to domestic over foreign travel, seeking to support their own local economy in a form of behaviour which is styled as 'tourism ethnocentrism' (Kock, Josiassen, Karpen, and Farrelly 2019(a)). The phenomenon of tourism ethnocentricism is defined as follows: "an individual's prescriptive beliefs and felt moral obligation to support the domestic tourism economy" (Kock et al., 2019a: 427-428). It is argued that for ethnocentric tourists "spending a holiday at a domestic destination is socially expected and a way to secure domestic jobs" (Kock et al., 2019a: 428). It is also described in some national contexts (such as USA) as "a patriotic duty" that preserves local employment opportunities (Kock et al., 2019a: 429).

Second, is the 'home-is-safer-than-abroad bias' in terms of which tourists regard their home country as a 'safe' destination and that "home is safe, no matter where home is" (Wolff et al., 2019). Das and Tiwari (2020: 1) describe as follows: "travellers consider travelling in their home country safer compared to travelling abroad". Possible explanations for this situation are that risk aversion is higher when considering international as opposed to domestic travel; in addition domestic travel offers a prospect of increased personal control anchored on a belief that "one is better in avoiding risks at home than in a foreign country" (Wolff et al., 2019: 6). Research findings from consumer perceptions in Indonesia once again confirm that domestic travel is considered a lower risk than international travel (Kusumaningrum and Wachyuni, 2020). Three, certain researchers suggest that holiday travel as a form of conspicuous consumption for the prestige enhancement of individuals may shift as 'the tourist' might be viewed in changing public discourse as a potentially dangerous 'infectious intruder'. Recent work by Kuhn et al. (2020) shows how societal changes of the perception of travel linked to COVID-19 can decrease the role of travel as a vehicle of conspicuous consumption.

Four, the threat of COVID-19 makes people alert to and avoid crowded situations, a mind shift about 'crowdedness' that results in preferences for visits to more remote and less populated tourist areas as compared to overcrowded traditional mass tourism destinations. This was confirmed in the 26 country study by Bieger and Laesser (2020) which underlined that when people travelled they tended to prefer quiet areas that allow for social distancing such as mountains or the countryside, including national and state parks. One study of tourist behaviour (n=308) identified that among the most commonly expressed statements was to "avoid people as much as possible" (Chebli and Said, 2020). Korean research using network analysis of the movement patterns of tourists confirms that "in response to COVID-19 people are seeking open spaces where tourism density is relatively low, and social distancing is possible" (Jeon and Yang, 2021; 12).

Five, one critical but uncertain aspect of tourism behaviour is the extent to which COVID-19 will encourage people to become more environmentally conscious in their travel behaviour in order to counter threats posed by climate change, environmental destruction and the spread of infectious diseases. Several authors have called for such forms of behavioural change (Hall et al., 2020; Higgins-Desboilles, 2020a; Prideaux et al., 2020). The results from work done by O'Çonnor and Assaker (2021) point to a range of influences upon what they term environmental moral obligation and intention to pursue pro-environmental travel behaviour.

Finally, the new tourist psyche potentially can cause an avoidance of unknown things as a whole and the tendency towards what is termed 'tourism xenophobia' as tourists experience feelings of discomfort with locals as strangers. This perception coupled with a self-image of being a "temporary outsider in a foreign space" can result in feelings of vulnerability and higher travel risk which are exacerbated in the context of a disease outbreak as well as encourage the purchase of travel insurance (Kock, Josiassen and Assaf, 2019(b): 159). The consequences of a growth of 'xenophobic tourists' is curbing international travel and even going so far as to include an avoidance of 'foreign food'. Nevertheless, drawing on research from social and evolutionary psychology Nørfelt, Kock and Josiassen (2020) also draw attention to the counter-trend for 'tourism xenophilia' which is defined as individuals' attraction toward the perceived foreignness of destinations. It is argued that tourism xenophilia is an important basis for explaining tourism behaviours, including willingness to engage with locals, willingness to stay at a local bed and breakfast, intention to try local food, and travel to foreign destinations.

13.2 Findings: Travel Intentions and Changing Mobilities

According to Wood (2021: 14) the COVID-19 pandemic has made painfully clear that leisure travel "has ostensibly become a devil's bargain in which privileged people trade planetary and public health for their own pleasure and personal enrichment". From multiple surveys conducted across several countries there is a growing weight of evidence that COVID-19 is exerting a major impact in terms of travel intentions in relation to changing mobilities and modes of travel of those privileged to travel either for leisure or business purposes.

The most common findings are that consumers are pivoting away from modes of transport that involve higher perceived risks and exposure to other tourists – most notably cruise ships, air travel, as well as certain public bus and rail transport. The preferred shifts are towards private forms of mobility, including private cars, rented cars and, in some countries, for campervans (Butler, 2020). These trends are apparent with only minor variations in the survey findings reported from Australia, Bulgaria, China, and the USA. In China a survey of 1600 travellers revealed a major decline as compared to pre-COVID-19 in planned travel on cruise ships and a corresponding marked increase in planning for self-drive travel (Chen et al., 2020). The trend is that in future self-guided and self-driven trips will dominate over group and organised tours (Chen et al., 2020; Ivanova et al., 2020).Research for the US travel association confirmed that leisure travellers feel safest in personal vehicles and least safe in cruise ships (MMGY Intelligence, 2020). Business travellers also feel safety is highest using either personal or rental cars. The US findings are that consumers are willing to drive more and longer both for leisure and business purposes rather than utilise other means of riskier forms of travel (MMGY Intelligence, 2020). Similar findings for the USA are reported by Canina and McQuiddy Davis (2020) that as compared to pre-COVID-19 the form of transport chosen for next leisure trip shows marked increases in use of personal and rental cars and a decline for air transport, train, bus and especially ships. For business travel there is a marked upturn for private car and rental car usage and a decline in other modes. Of interest is that the potential downturn in use of air travel is far less for business travellers than the sharp drop for leisure aeromobilities (Canina and McQuiddy Davis, 2020: 5). In Bulgaria research by Ivanova et al. (2020: 7) reports that "respondents choose the car as the preferred transport for their next trip". It was observed that Bulgarians appeared quite optimistic about a return to travelling by air similar to emerging findings in the USA (Ivanova et al., 2020). Of note was the finding that Bulgarians with lower incomes would be those most willing to travel on organised package trips and low-cost airlines.

Australia has been the focus of the most detailed investigations on changes in the planned mode of transportation with COVID-19 impacts. The research undertaken by Flinders University (2020) revealed potential significant changes after travel restrictions are removed. The key findings (survey of 810 participants) were that the most popular choice for leisure transport was private vehicle (93%) followed (with some degree of caution) by air travel as the second most preferred mode of transportation (65.9%). Respondents were 'unsure' as to whether they would return to using private coaches or public transport. Once again the most emphatic rejection was for future travel by cruise ships.The Australia findings point to a conclusion that domestic self-drive tourism will increase in the immediate future and emerge as the most common pursuit after travel restrictions are lifted (Flinders University, 2020). Research undertaken by Beck and Hensher (2020: 6) at a period of some easing of travel restrictions in Australia concluded that motor-vehicle travel was "rebounding more than other modes". By way of summary Sigala (2020) points out that Australians will prefer "to take to the wheel" using private cars, motor-homes and even motor-bikes or bicycles rather than take to the skies. Indeed, this situation is projected to continue until flying costs and health risks are addressed such as to allow travellers to happily take a plane once more. The Australia results also point to the potential close of the era of 'aquamobilities' in the form of extensive participation in cruise tourism (Higgins-Desbiolles, 2020b).

This COVID-19 demand shift in mobilities towards the greater use of the private car, rental vehicle or motor-home is important as it contains a number of implications for tourism policy-makers. Arguably, the propensity to travel via personally-owned or hired cars or campervans points to the need to (re-)examine the role of automobilities and of self-drive tourism (Butler and Szili, 2020). Drive tourism centres on travelling from an origin point to a destination by a private or rented vehicle and engaging in tourism-related activities on the journey (Prideaux and Carson, 2003).At least for the case of Australia – and one might argue for many other countries – "private vehicles and motor cars especially appear destined to play a continued and significant role in the tourism -transport nexus of the future" (Butler, 2020). For domestic tourism the private car has a number of advantages and positive features. For the tourist the private vehicle functions "as mobile viewing machine that not only takes in vistas, but the sensations and feelings of the road as well as the landscapes or environments that they mediate" (Butler, 2020). Further advantages relate to opportunities for flexibility, freedom and autonomy as contrasted to the inflexibilities of other modes of transport. Trains or buses move people from predetermined start points to predetermined destinations and do not allow – as does the 'freedom of the road' enjoyed with the motor car – the tourist to deviate course or meander at will. As summarised by Prideaux and Carson (2013: 309):

A major aspect of drive tourism is its individuality and lack of rigidity compared to the conformity of a package tour. Compared to a typical mass tourism product a traveller on a drive tour is not necessarily confined by location, selection of activity or timetables. It is the freedom of drive tourists to make and change their itinerary that is a distinguishing feature of drive tourism. Moreover, participants in drive tourism have a greater selection of localities and can decide on the time allocated to specific activities as well as selecting and substituting attractions.

Importantly, with the growth of automobilities and self-drive tourism there emerge new opportunities to stimulate regional tourism economies including the possibilities for remote and rural tourism destinations in Australia (Butler, 2020; KPMG, 2020). In the view of Sigala (2020) the tendency and policy opportunity is for people to travel from major cities out to the regions rather than the other direction as major cities in the COVID-19 environment are still suffering and unable to cope as yet with an influx of large numbers of people. The United Nations World Tourism Organisation (2020b) argues that the COVID-19 pandemic highlights more than ever the role of tourism in rural areas which offer significant opportunities for recovery as with changes in consumer demand tourists look for less populated destinations and open-air experiences and activities. Overall several critical policy issues arise with automobilities in terms of organising and enhancing awareness of tourism routes, safety on roads, signage, and improving road infrastructure quality in remote areas that often are not always the major focus of concern for policy-makers. Support for self-drive tourism thus offers policy opportunities to support tourism in 'off the beaten track' locations – including rural areas - that might have experienced economic downturn as a result either of limited tourism interest or reduced tourist flows because of COVID-19 impacts (UNWTO, 2020b).

13.3 Findings: Travel Intentions and Changing Patterns of Demand

The emerging new tourism psyche alongside changing travel mobilities inevitably are engineering shifts in the complexion and patterns of consumer demand for particular forms of tourism products and destinations. Safety, cleanliness and hygiene management are revealed as key drivers of new consumer demand intentions (Awan et al., 2020; Elsayeh, 2020; Wojcieszak-Zbierska et al., 2020; Yu et al., 2021). Research undertaken by the OECD (2020a: 9) across a range of countries identified the trend that with the re-start of tourism driven primarily by domestic markets "tourists have preferred to visit more remote and rural destinations and natural areas" which "has opened up opportunities in places where tourism had not previously been well developed". A similar conclusion on behavioural changes was reported in research prepared for the European Union revealing new preferences for low-density tourist destinations and outdoor activities away from overcrowded places and large cities and in regions with a safer image in terms of COVID-19 circulation (Marques Santos et al., 2020). For urban tourism, in the short term, the travel behaviour of visitors will change making them less willing to visit crowded places or to gather in large groups. This might reduce the volume of urban tourism or potentially change the intra-city distribution of visitors allowing cities an opportunity to spread the geographical impacts of tourism and to develop a more diverse portfolio of options including off the beaten track tours in cities.

Over the next two decades in line with changes in consumer demand the United Nations Secretary-General predicts rapid growth in mountain tourism, nature, heritage, cultural and adventure tourism. In particular, the report singles out the potential growth in ecotourism and suggests “that global spending on ecotourism will increase at a higher rate than the average industry-wide growth” (United Nations, 2020: 24). Further research by UNCTAD (2020) on COVID-19 impacts on the blue economy points out that once confinement measures are lifted it projects that a growth in consumer preferences for “coastal and rural areas in a quest for contact with nature, open air and water” (UNCTAD, 2020: 2). Based on several analyses of COVID-19 on consumer travel intentions the OECD (2020b) anticipates that “nature will be explored more in the post-COVID-19 era” and that free spaces, remoteness, air purity and water freshness will gain more value for tourists leading to a significant rise of domestic tourist flows to protected areas.

The results from the large-scale United Kingdom surveys regularly undertaken for Visit Britain (2020) mirror parallel consumer sentiments. The main type of destination expressed for both summer and winter visits was “countryside or village” and in summer followed by traditional coastal and seaside destinations. For summer the most preferred accommodation option was for caravan parks or camping sites. Questions about general leisure activity intentions disclose that the most popular growth is for outdoor activities related to nature with walking or hiking and a focus on coastal walks or trails, mountain, hills or other rural areas, visits to beaches, gardens or country parks. By contrast, the activities that were consistently least favoured were those indoor attractions such as activity centres (Visit Britain, 2020). With the exception of visits to traditional seaside/beach resorts these findings appear to confirm Zenker and Kock’s (2020: 3) view that shifting attitudes towards crowdedness are initiating a trend towards “the avoidance of mass-tourism destinations in the favour of more remote less populated destinations”.

These core trends as revealed in cross-country studies and by large-scale monitoring investigations are reinforced by a host of scholarly studies which are nationally focused. For the USA Craig (2020: 1) reports that “present-day travelers prefer distance from others, natural space, and outdoor recreation” pointing to new opportunities around camping tourism. In Czechia the impacts of COVID-19 include opportunities for the growth of rural tourism centred variously on natural, gastronomic and local attractions (Vashar and Štastná, 2020). Spalding et al (2020: 2) aver that post-COVID market forces and changes in consumer demand "are likely to heighten awareness of the value and dependency of tourism on nature and indeed to increase these values and this dependency". They point to the trend widely observed in Europe that many travellers "will seek out places with space'; less-developed coastal and countryside locations, national parks and nature reserves" (Spalding et al., 2020: 2). For the case of Poland, holidays in the country to be spent on agritourism farms are anticipating a marked upturn as a consequence of the COVID-19 pandemic (Wojcieszak-Zbierska et al., 2020). Research on Turkish traveller intentions concluded that post-COVID-19 they "will be more motivated in terms of selecting outdoor activities and eco-tours" (Jafari et al., 2020: 12). Similar findings from Turkey were reported by Özdemir and Yildiz (2020: 1111) that as nature-tourism destinations were considered safe spaces "interest in nature-based tourism is likely to increase in the future". The impacts of COVID-19 in terms of growing rural tourism in Europe are questioned from research in Portugal where the effects have been negative, a finding which suggests that there will be uneven geographical and temporal implications of the pandemic for rural tourism (Silva, 2021).

In China nature-based areas already are growing in importance for domestic tourists (Hong et al., 2020). Zhu and Deng (2020: 1) contend that "rural tourism is expected to be the top choice for Chinese residents for relaxation and enhancing parent-child relationships". The research on Chinese tourist behaviour linked to the COVID-19 pandemic by Maltseva and Li (2020: 286) identified the trends for "the increasing role of ecotourism", "small group priority" and "advanced booking of a private guide and car". Zhan et al. (2020) disclose a great diversity in the willingness of Chinese residents to visit or revisit Wuhan, which was a major domestic tourism destination in China prior to its image and brand being tarnished as the epicentre for the COVID-19 outbreak. In Korea the big data analysis of social media concluded as follows: "the tourism industry must develop safe and nature-friendly travel destinations" and "promote those destinations as safety-prioritized sheltered resting spots " (Sung et al., 2021: 18). In another Korean investigation it was revealed that as people's vigilance against COVID-19 infection has grown "people are seeking open spaces where tourism density is relatively low, and social distancing is possible" (Jeon and Yang, 2021: 12).

Seraphin and Dosquet (2020) highlight what they call the mutation effects of COVID-19 on tourism trends. They argue that 'mountain tourism' and 'second home tourism' potentially could play the role of 'placebo' in the post-COVID-19 context of lockdown. The importance of second homes tourism is further identified by other researchers. For example, Zoĝal, Domènech, and Emekli (2020) project that second homes will become a centre of tourism activity once travel restrictions are lifted and potentially can be a component in the recovery of domestic tourism. It is noted in the early days of the pandemic that second-home owners in many countries (especially Europe) migrated from crowded cities to low density areas and that this is indicative of a shift in consumer preferences. Post-pandemic the renting-out of these second homes through AirBnb and other sharing accommodation platforms is a potential growth trend for domestic tourism in many countries. From an Australian perspective it is projected as follows: "Stays in private second homes, small accommodation units, caravan parks, campsites, motor homes and privately-owned vacation rentals will be preferred against stays at large crowded resorts and hotels" (Sigala, 2020: 2). By contrast, with a consumer focus on outdoor activities and eliminating their touch with others, theme parks, casinos, large museums, exhibitions and integrated resorts are likely losers in relation to parks, beaches and outback activities.

Wen et al (2020) argue that Chinese travelers changing consumption patterns will include alongside nature-based travel options a trend towards 'slow tourism' which focuses on longer lengths of stay and more fulfilling tourist experiences. From research in Indonesia on domestic tourist travel preferences post-COVID-19 pandemic Yuni (2020) concluded once more that nature tourism was the most preferred form of tourism. In addition, Wachyuni and Kusumaningrum (2020: 74) reported as follows: "tourists will prefer natural attractions with a short travel time" and that "nature tourism will be the most important attraction with important aspects of safety, cleanliness and beauty to fulfill tourist demand". Musavengane, Leonard and Mureyani (2020: 9) suggest that in the South African context the country's protected areas (including community-based nature-based recreational facilities) might experience large volumes of visitors, especially domestic tourists and therefore caution of the need to manage any challenges that might arise from overcrowding. The question of beach management in times of the COVID-19 pandemic is also flagged for policy attention (Zielinski and Botero, 2020). Arguably, the pandemic has concentrated international attention on the nexus of healthy nature and of human health and well-being, and the central importance of nature for mental health . For Tanzania Mwamwaja and Mlozi (2020: 11) view COVID-19 as a practical "wake-up call for Tanzania to now turn their attention to domestic tourism" and the country's protected areas. In Algeria the preferred places to relieve the psychological stresses caused by COVID-19 are seaside areas as well as nature attractions especially forested areas (Madnai et al., 2020). A wider investigation in North Africa also showed that "travelling to less crowded places may be the new trend" and especially pointed to a growth for rural tourism (Chebli and Said, 2020: 200).

In the (post) COVID-19 environment a highly significant role will be assumed by ‘green spaces’ as a whole and by national parks and nature reserves in particular. Overall, as a reflection of the new tourism psyche about crowdedness it is evident that natural areas “are likely to exert a stronger pull than before, with travellers and tourists seeking to avoid crowds and polluted cities” (Spalding et al., 2020: 2). There is a growing weight of evidence that points to the psychological and restorative benefits of interactions with nature. For example, Wolf, Stricker and Hagenloh (2015: 359) stress that the personal benefits from visiting natural parks, including health benefits from outdoor activities “can be ascribed to the restorative capacity of natural environments”. Willis (2015: 38) underlines the fact that tourism in nature “plays an important role in relieving the human mind of stress, restoring cognitive abilities, promoting relaxation and calmness and also in engendering a sense of energy and re-invigoration”. Hiking and ecotourism are recognised as associated with mental restoration (Qiu, Sha and Utomo, 2021). Most recently, in an investigation conducted about national parks in Australia, Buckley (2020) highlights how nature exposure acts as psychological rescue improving mental health with positive emotional benefits and most especially in terms of recovery from stress. Arguably, this will open up potentially a large market for commercial nature tourism as a provider of ‘nature therapies’ (Buckley, 2020; Buckley and Westaway, 2020).

Finally, a caution is sounded from research conducted in Zimbabwe in terms of the sustainability of a strategy for promoting domestic tourism to revive local tourism economies and build destination resilience in Africa (Woyo, 2021). Interviews conducted concerning the perception of domestic travellers point to the limits of such a strategy as a recovery option for African tourism. It was revealed by Woyo (2021) that issues of affordability of leisure tourism products represent a deep-seated challenge as tourism products targeted at international tourists are expensive for the domestic market. Unwillingness of domestic travellers to pay premium prices and thus affordability are core issues that need to be considered in the African context.

13.4 Findings: The Contactless Economy and Untact Tourism

The rise of the ‘contactless economy’ undoubtedly will be one of the most notable outcomes of shifts occurring in consumer demand in relation to the COVID-19 pandemic. The contactless economy is described as a real phenomenon in the making and represents behavioural change which is driven by the consumers hyper-awareness of health and safety considerations (Monitor Deloitte, 2020). With COVID-19 disrupting human touch in daily life there is a realisation that physical connectedness can be a vulnerability (Strategy &, 2020). This is the catalyst for an advancing mega-trend globally towards a contactless economy with the accelerated digitalization of everyday life and business which is driven most especially in Japan by 4IR technologies (Strategy &, 2020).

In the case of South Korea there is a push towards re-shaping the entire national economy around the concept of "untact" which is a synonym for contactless. Lee and Lee (2020: 4) describe untact "as a portmanteau term created in South Korea by adding the prefix 'un', which has the meaning 'no' to the word 'contact'. The term untact thus means 'undoing contact' and therefore doing things without direct contact with others. Untact is viewed as a new customer service strategy for the digital era (Bae and Chang, 2020; Lee and Lee, 2020). According to Lee and Lee (2020: 4) "untact service refers to service that is provided without face-to-face encounters between employees and customers through the use of digital technologies" and usually it is initiated "by the consumer who desires a service without engaging in a personal encounter". Jeon and Yang (2021: 1) regard untact interactions (non-face-to-face) as "now part of a new social culture". Untact is a key anchor for South Korea's New Deal programme which calls among other things for further investment in robots, drones, self-driving vehicles and other technologies that might reduce the need for person-to person contact (Monitor Deloitte, 2020). Examples of untact consumption include e-banking apps, self-service counters, online purchasing and payment, as well as unattended kiosks based on technological innovation (Bae and Chang, 2020; Lee and Lee, 2020; Sung and Jeon, 2020). The appearance of robot baristas in coffee shops is another sign that untact is expanding in the hospitality sector in terms of service delivery operations (Sung and Jeon, 2020).

From Australia there is evidence that tourism companies are beginning to change their offerings in line with the new imperatives for untact, social distancing and enhanced hygiene requirements. Sigala (2020: 2) argues that tourism enterprises "are re-designing experiences (e.g. winery experiences, museum visits, tours, sports events, in-room dining and entertainment instead of hotel facilities) to feature smaller groups of tourists, outdoor activities and/or private experiences complying with social distancing and gathering restrictions and travellers' expectations". The impact of the contactless economy on tourism currently is most strongly expressed in developments taking place in Japan and especially in South Korea. The term 'untact tourism' is becoming popular in South Korea to describe a new form of travelling that prioritizes social distancing by avoiding crowded places and indoor activities. The term is applied to any travel destination or tourism experience which is designed to facilitate social distancing and reduce the potential spread of COVID-19.

The national tourism organization – the Korea Tourism Organization – announced on 29 June 2020 a list of 100 'untact' tourism attractions to enable people to travel safely and leisurely (Busan Metropolitan City, 2020). Bae and Chang (2020) maintain that untact tourism represents a health-protective measure and it is rooted in individuals' perception of COVID-19 risk. In addition, they view untact as an umbrella term "to indicate a new normal tourism behaviour, which satisfies individuals remaining desire to travel during the pandemic while minimizing the perceived risks from the disease" (Bae and Chang, 2020: 15). Untact tourist attractions in Korea include wide-open outdoor areas that include mountains, beaches, healing forests, botanical gardens and mountain trails (Busan Metropolitan City, 2020). As people avoid busy indoor areas during their travels the Korea Mobility system recommends tour routes for trekking, cycling and self-drive tourism aiming to assist those seeking outdoor activities (Dupeyras et al., 2020).

The following description of untact tourism as it is evolving in South Korea is offered by Bae and Chang (2020: 2):

Korean citizens have started to engage in untact travel activities to satisfy their thirsts for travel and leisure while minimizing the possible risks from COVID-19. Even during the pandemic, people left for isolated healing by spending time in nature, staying in accommodations exclusively reserved for the family, enjoying outdoor camping and road trips, or travelling alone… Local tourism governments also have promoted regional hiking trails, forests and parks as their untact tourism destination, and have also offered information for local scenic driving routes for untact leisure. In addition, hotels have offered untact services such as private dining rooms, buffet room service, and live chat concierge service. Health authorities have announced a code of conduct for 'untact tourism' highlighting practical recommendations for safe travel experience based on in-travel social distancing (eg. keeping a space between tables in cafes and restaurants, limiting the number of visitors for a day, no touting at markets, using private amenities at accommodations, and encouraging outdoor activities rather than indoor activities).

The conclusions and implications of this most detailed research on untact tourism in Korea merit careful policy consideration. Bae and Chang (2020: 15) state as follows:

Tourism practitioners may need to consider untact tourism as a new paradigm that accommodates individuals' need to minimize their perceived risks as well as satisfy their need to travel. It is not the mere removal of service encounters but, in fact, could be a premium service based on a high level of customization. For example, breakfast buffets at luxurious hotels used to be one of the most appealing factors to attract customers in Korea, while room service received far less attention. However, because customers want to secure their personal spaces, room service of the breakfast buffet has gained much popularity since the outbreak of COVID-19. Individuals will prefer to join tourism programmes in a small group on a reservation basis. Hotels may need to offer a personalized room based on customers' needs to ensure safety. Strictly certified services, spaces or programmes in terms of their safety would meet the increased demand for untact tourism. Tourism practitioners would be able to drive the message regarding their efforts in practicing untact as a safeguard for tourists' safe travel experiences.

Arguably, in terms of encouraging a rethinking of policy directions linked to behavioural changes in demand resultant from the COVID-19 pandemic, there is much that potentially can be learned from monitoring the unfolding of untact tourism and considering the implications of the global spread of the contactless economy for remoulding the characteristics of tourism demand. Untact must be understood as a health-protective behaviour aimed at minimizing human contact and therefore to cope with COVID-19 risk perceptions. It offers opportunities for enacting policy interventions to shape tourism sector supply and demand in order to meet the needs and demands of tourists in the continuing COVID-19 environment. Jeon and Yang (2021) highlight the need for flexible tourism demand management. One example would be installation of population sensors centred on major tourism attractions to provide real time information on the congestion and density at particular places and thus to reduce density and increase social distancing.

13.5 Findings: International 'Good Practice' for Reigniting Domestic Tourism Demand

This section turns to present the findings of the international review of literature which relates to initiatives for reigniting demand for domestic tourism. Over a decade ago Scheyvens (2000, 2007) drew attention to the need for more research on domestic tourism especially in tourism destinations in the global South. Walton (2009) argued that in Africa domestic tourism was "the poor relation" in tourism studies. Nyaupane Morris and Li (2020: 2) aver that despite the large volume of domestic tourism "traditionally tourism literature is mostly focused on international tourism and grossly undermines the domestic tourism phenomena". Likewise, Ragab, Smith, Ragab and Meis (2020: 5) contend that notwithstanding that domestic tourism is the mainstay of tourism demand for many destinations "it does not receive as much attention as international tourism does in either academic or governmental research". In numerical terms, domestic and regional tourism far exceeds international visitation in Africa although the tourist spend value of the latter to most countries is far greater. Timothy (2020: 67) views domestic tourism as "not a type of tourism but rather a measure of geography, determined by the inseparability of space and time". The concept of domestic tourism is relatively recent in origin as in pre-modern times discretionary travel lacked the formal borders that function as the definitions of modern states. Indeed, the notion of domestic tourism was instituted only in a modern world with formally constituted borders to distinguish ‘local’ from ‘foreign’ travellers. The term is a slippery concept encompassing an often seamless mix of diverse forms of discretionary travel some associated with everyday leisure activities, much comprised of VFR travel, and other mobilities more akin to work.

Certainly, the COVID-19 pandemic highlights the need for an expanded understanding of the nature of domestic and regional tourism across the continent. Arguably, domestic and regional tourism must be critical components in recovery strategies for African tourism (Adam & Kimbu, 2020; Rogerson & Baum, 2020). Support initiatives for promoting domestic tourism in Africa generally have focused on tourism marketing to create awareness of products offered and sensitizing domestic tourists to products on offer, enhancement of infrastructure to facilitate domestic travel, product diversification geared to domestic consumer preferences, and dual pricing initiatives with different pricing structures at attractions for domestic as opposed to international visitors (Republic of Kenya, 2020). In addition, there is widespread agreement for governments to introduce direct financial incentives for tourism SMME development in terms of supporting initiatives to enhancing competitiveness.

The UNWTO (2020a) provides a useful inventory of a range of initiatives launched by governments which are geared to promote domestic tourism and restore confidence in the sector amid the COVID-19 environment. Across the different initiatives six categories of support intervention are identified:

1.. Financial incentives;

2. Marketing and promotion;

3. Product development;

4. Partnerships;

5. Market Intelligence; and,

6. Capacity building and training

The most common support intervention is that of financial incentives which are applied on both the demand and supply side in order to boost domestic tourism. On the demand-side the UNWTO (2020a) identifies the introduction of vouchers for residents in a country to spend in domestic tourism establishments. Among many examples of such forms of assistance are travel vouchers issued in Iceland, free vouchers in Poland for families with children which can be spent on hotel services or tour events, Korea’s introduction of discount vouchers at accommodation service establishments, travel discount vouchers in Malaysia or in Greece subsidized holidays addressed at low-income groups through its programme for social tourism.

A second form of demand-side stimulus is the grant of fiscal incentives such as the reduction of local taxes such as VAT on domestic flights as occurred in Turkey (UNWTO, 2020a). In Kenya calls have been made for much broader sweeping tax changes in support of reviving the local tourism economy. In terms of recovery pathways for Kenya domestic tourism an official report states as follows: "The government should review all taxes, charges and levies impacting on tourism, transport and related activities. It should also provide temporary suspension or reduction of travel and tourism taxes, charges and levies, including VAT and income taxes as well as of specific tourism and transport charges in a fair, non-discriminatory and transparent manner" (Republic of Kenya, 2020).

A third approach to boost demand is the promotion of long weekends which might involve moving certain bank holidays as a measure to encourage domestic tourism. Mexico, Costa Rica and New Zealand are among countries that have adopted the 'long weekend' strategy. On the supply-side fiscal incentives are aimed mainly at providing financial support to the domestic tourism sector. The two most commonly applied mechanisms are the allocation of specific funds to assist tourism enterprises or to support destination marketing organizations for extended promotional campaigns to spur domestic travel. The UNWTO (2020a) maintains that these demand and supply-side financial incentives targeted to boost domestic tourism seek variously to stimulate the liquidity of tourism businesses, especially SMMEs, strengthen employment and support local economies "while at the same time in many cases extending the tourism season and, in some others, allowing lower-income households access to holidays this year".

The second set of support intervention which has been perhaps the most popular across many countries is marketing and promotional campaigns encouraging their citizens variously to "do something new", "discover (or rediscover) their country", or to rally behind programmes to "support local". Illustratively, in Malaysia national government launched a campaign to encourage citizens to travel to nearby places for weekend getaways, in Korea marketing was targeted at boosting off-season holidays and in Finland a domestic tourism campaign was supporting domestic tourism through its '100 reasons to travel in Finland' programme. In Hungary as well as encouraging its nationals to rediscover the country and explore rural landscapes a strategy was introduced to promote urban tourism in the country's capital city, Budapest.

The nature of the promotional campaigns which have been applied to restore confidence in domestic travel includes both the launch of new domestic tourism campaigns as well as strengthening existing domestic tourism marketing. Usually campaigns are taking place on digital platforms and social media but in some instances promoting contests. Overall, tourism marketing is concentrated on either promoting less well-known destinations – often rural and natural areas – or upon existing major destinations (UNWTO, 2020a).

Product development interventions represent a third category of support used by governments around the world to reboot domestic tourism. The UNWTO (2020a) maintains that the strategy for product development is often related to nature, protected areas and activities in the open air/spaces which are far from concentrated urban areas. The tourism products that have attracted attention include wellness, natural protected areas, adventure and ecotourism, cultural and gastronomic tourism, and rural tourism. Nevertheless, in some countries attempts have been made to encourage urban tourism especially in capital cities. In the case of Paraguay the promotion of capital city tourism was assisted by enhancing the infrastructure of Asunción's historic city centre. Another area for product development relates to drive tourism and to the promotion of tourism routes and road travel.

A fourth type of boosting initiative for domestic tourism has occurred through the pursuit by national authorities of partnerships or joint tourism initiatives with either other public sector stakeholders (local governments) or the private sector. The initiatives launched as a consequence of such partnerships vary greatly from the support for holiday vouchers, the establishment of new tourism products at destinations, improving local products or local infrastructure and many programmes to enhance domestic tourism marketing. A significant finding from UNWTO (2020a) is that in terms of such partnerships it is argued that municipalities are considered "as key partners for national tourism authorities since their specific experience and knowledge of destinations is providing relevant insights when it comes to the design of domestic tourism strategies at national level". Chile provides one example of a country where strong coordination has been occurring between national and local authorities. Concerning the private sector joint marketing has been undertaken and in certain cases strategic alliances with the private sector have been undertaken to promote special offers to prospective domestic tourists. Costa Rica and Korea are cited as cases where national authorities collaborate with the private sector to promote both special offers such as discounts on visiting attractions.

A fifth type of support initiative has been aimed at strengthening marketing intelligence. This has involved support from national government of surveys that seek to understand local consumer's intentions to travel and planning of travel following the lifting of travel restrictions. In essence the type of research that has been supported is similar to that which was reported in section 9 on the demand-side research. Examples are those of Malaysia and the Philippines where governments have conducted online surveys of consumer intentions and sentiments. According to UNWTO (2020a) the results of such surveys can feed into planning "appropriate and effective strategies to employ in restarting tourism, especially in terms of promotion and product development".

The final category of support interventions identified by the UNWTO (2020a) for supporting the revival of domestic tourism surrounds capacity building and training. Such initiatives are targeted at tourism stakeholders as a whole and include online training platforms and webinars which are designed to support professional skills development of frontline workers in contact with domestic tourists, the creation of new products specifically for the domestic tourism market or for assistance with marketing of domestic experiences and tailor-made marketing to build domestic tourism.

14 Findings: Supply-Side Analysis

This section moves from demand-side issues to present the findings from the supply-side analysis which was based on 60 interviews that were conducted with tourism stakeholders and product owners in the three case study areas of the clusters of tourism focused on Bela-Bela, Limpopo, Bushbuckridge, Mpumalanga and the Overstrand, Western Cape. The interviews were conducted during the period December 2020-February 2021. The timing of these interviews coincided for many interviewees with the third alcohol ban and the bans on public access to beaches and outdoor spaces. The method of conducting these interviews varied and was dependent upon the preference of the tourism product owner. A segment of interviews was undertaken in person with appropriate social distancing in place. Overall the majority of cases (37 in total) interviews were conducted in person. Telephonic interviews were necessary with some product owners in the Bushbuckridge and Bela-Bela samples with researcher access impacted by floods and poor state of roads. In some cases the approach was an emailed questionnaire with follow-up telephone call for clarification. The in-person interviews varied greatly in length from a minimum of 40 minutes to a maximum of nearly two hours.

The findings are presented separately for each of the three tourism clusters that were selected for investigation. In each locality case study five themes are investigated for discussion and analysis, namely

(1) overview of businesses and impacts of COVID-19; (2) supply-side response to changes in demand; (3) supply-side challenges and opportunities; (4) the role of government; and, (5) business prospects. The results reveal several common themes across the three clusters as well as pointing to a number of locally specific issues. The core common findings across the three localities are drawn upon in terms of identifying recommendations which emerge from the evidence of our 60 supply-side interviews with tourism product owners.

14.1. Findings: Bela-Bela

In the post-1994 period Bela-Bela has continued its established popularity as a hub for domestic tourism in South Africa. The locality benefits from geographical proximity to Gauteng, South Africa's largest and most economically prosperous region for which it serves as the recreational periphery. The local Integrated Development Plan provides an overview of the current tourism product mix and of planned developments (Bela-Bela Local Municipality, 2016). It states that the principal attraction of the area remains that of its natural hot springs with spring water rising to the surface at a temperature of 53C, rich in limestone and thus with wellness or healing qualities. In addition to its attraction for visitors as a spa and water entertainment, the area continues to be an attractive destination in terms of its range of game reserves, time-share offerings as well as heritage sites.

The municipality contains a range of accommodation service providers from hotels/resorts, game lodges, caravan parks, bed and breakfasts, and guest houses. The largest accommodation establishment is Forever Resorts. Nevertheless, the significance of the small-scale accommodation sector - especially lodges and self-catering services - in Bela-Bela and its surrounds is emphasized in research produced by Nelwamondo (2009).

14.1.1 Overview of businesses and impacts of COVID-19

Table 5 presents an overview of the tourism establishments included in the Bela-Bela research. It is evident that the sample captured a representation of the mix of attractions and accommodation service providers that characterise the area. In terms of years in operation the sample includes the area's established tourist attractions as well as a range of accommodation establishments all of which have been in operation for at least three years.

Table 5: The Bela-Bela Sample of Interviewed Enterprises

Identifier	Type of business	Years in operation	Number of employees
BB1	Wildlife tourism	10	20
BB2	Leisure resort	80	120

Identifier	Type of business	Years in operation	Number of employees
BB3	Wellness	3	6
BB4	Accommodation	15	2
BB5	Accommodation	3	3
BB6	Accommodation	10	25
BB7	Accommodation	4	4
BB8	Restaurant	3	8
BB9	Accommodation	5	3
BB10	Wildlife tourism	15	25
BB11	Accommodation	5	4
BB12	Activity	8	4
BB13	Accommodation	12	3
BB14	Accommodation	20	6
BB15	Accommodation	7	2
BB16	Monkey sanctuary	18	1
BB17	Wildlife attraction	27	5
BB18	Wildlife attraction	4	1
BB19	Accommodation	22	7
BB20	Accommodation	4	1

Source: Authors

When asked to describe in one word or phrase the impact of COVID-19 on their establishment, all of the respondents indicated that the pandemic had negatively affected their business. Some descriptors used included '*devastating', 'heartbreaking', 'disastrous'* and '*detrimental*'. Such responses were to have been expected, given the substantial economic losses faced by the establishments concerned from the outset of lockdown. In fact, some of the respondents disclosed that they were running at a loss, with others becoming almost bankrupt.

It was confirmed by tourism stakeholders that domestic tourists comprise the largest market segment in Bela-Bela with international visitors constituted only a smaller share. Typically, one respondent described the situation as follows:

> *Most of our clientele is [i.e. are] domestic tourists. However, during the peak season, we also have [to cater for] international tourists. So, roughly, I can say [that] it's 90% domestic and 10% international.* (BB6)

Other respondents mentioned the following:

> *Our target market is mainly domestic and international tourists who visit Warmbaths and book accommodation with us … let's just say around 95% of them are domestic tourists and 5% are international tourists.* (BB9)

Well, I would say it's only about 10% or less for international tourists. It's mostly domestic tourists. (BB15)

The majority of respondents confirmed that the Warmbaths resort attracted mainly domestic tourists. Only a few respondents catered for international tourists:

*And we rely totally on paying volunteers from overseas, which obviously was totally cut out. (*BB16)

It's a difficult thing to explain. We lost a lot of people from overseas, especially during the week. We now don't do anything during the week, so there's a big impact on us, because we used to get … a lot of people from all over the world. Nowadays you don't get a lot of people, because they're not coming for hunting. They're not coming for [a] vacation. (BB12)

While most establishments identified their consumers as being mainly leisure tourists, the above statement highlights the importance of wildlife experiences, specifically hunting, as another drawcard for Bela-Bela. Another respondent, who noted that their international travellers were sometimes people who had visited the hunting farms in the area explained:

I would say about 70 domestic tourists, [i.e.] 70%. It's also seasonal. When it's hunting time in South Africa, we get a lot more international [visitors], … in December, as well [as] over the winter season. (BB17)

The above-mentioned establishments were located outside the city centre of Bela-Bela. It is the game farms on the periphery of the municipality that international tourists tended to frequent predominantly for the purpose of participating in hunting-related activities, which substantially decreased in 2020.

14.1.2. Supply-side response to changes in demand

From the supply-side responses the pandemic presents long-term structural and operational changes for the tourism industry of Bela-Bela. The study saw mixed responses in the demand for tourism in Bela-Bela. Some respondents noted that the demand for their offerings was low, and showed little sign of growth, owing to the economic status of most South Africans. To illustrate, below are some statements taken from the various establishments in Bela-Bela:

We have noticed a big drop in demand already, as opposed to previous years – a major decrease in demand of about 60%. (BB3)

There has been a major drop in bookings, because our clients are unable to travel. This is going to get worse, as most people are being retrenched. (BB4)

> *Due to retrenchments, and resulting from Covid-19, most of our guests have cancelled their booking, and others even requested that we refund them. Those who are willing to travel ask for price reductions.* (BB9)

The lockdown adversely impacted the economic conditions in South Africa. In common with other parts of the world, rates of unemployment increased at an alarming rate. The responses from several respondents indicated the low demand to be viewed as a result of escalating unemployment and the poor state of the national economy. Business tourism in terms of conferences was mostly badly impacted. The leisure market was noted as seeing some upturn during the period (level 3) when domestic tourism was permitted. Such views can be seen in the following comment:

> *While demand dropped off for the conferencing market, due to the pandemic, the leisure market, came back much more robust than we thought it would. However, it was only limited [to the period] around [the] weekends, and very short stays.* (BB2)

The responses of some of the interviewees alluded to leisure tourism in Bela-Bela as having experienced some increase, although with certain changes to the consumption patterns of the tourists involved. The above statement points to the domestic tourists' preference for weekday stays, as opposed to weekend stays. Such a preference linked to the reduced prices charged on weekdays, and from the specials that were run to boost reservations. Discussions with tourism managers and owners showed that the tourists who visited Bela-Bela expected lower rates than usual for accommodation and for participating in some activities:

> *Although domestic tourists still want to be educated and interact with the elephants, they want to do it at a cheaper price. Back when things were easier, we could also add more complementary products on the go, but now is it extremely difficult, as our clients don't like to pay 'hidden' costs.* (BB1)

> *The biggest problem that we are facing right now is the decrease in the number of bookings, and even when we get those bookings, clients always want to negotiate … a discount.* (BB5)

Evidently, value for money has become of increasing importance to the consumers of several tourism products and establishments in Bela-Bela. This said, the consensus among the managers and owners was that they could only reduce their prices to a certain extent, as their expenses still had to be paid. Tourism establishments in Bela-Bela are, therefore, faced with the challenge of having to balance the need to meet the demands of the consumer, while remaining profitable, or at least to break even.

The upturn in leisure domestic travel to Bela-Bela is a result of the destination's close proximity to key market areas as Johannesburg and Pretoria. Such an assertion is supported by the statement below:

> *We see more people visit us now, since people can no longer travel as much. As I was saying, we're not that far from Pretoria and Johannesburg. Thus, when people come here right now, they*

> *are much more likely to be in a more suitable natural setting than they would be if they came into some part of the world that had just recently reopened for tourism. And the people love coming to Africa's Wonderland on their vacations, and nobody has anything to do there in Johannesburg, they'd rather come here to see animals and nature.* (BB1)

Other respondents viewed the closure of the borders as a boost for the number of domestic tourists, stating:

> *Since the borders are still closed, we've seen an increase in domestic tourists, who want to experience something new. Although some are still trying out this new offering, we make sure that we satisfy them, and that they consider coming back to our establishment.* (BB6)

Accordingly, the respondents were of the view that the travel restrictions put in place had led to South Africans exploring domestic destinations across the country. However, a few of the respondents questioned the sustainability of the growth in domestic travel to Bela-Bela, contending that it would only be temporary, and the situation might change depending on the reopening of the borders:

> *But as a realist, I do not believe that "all of sudden" South Africans are going to just "go local". As soon as the dust settles, and the jets start crossing the globe, and other countries start putting out "unbelievable" once-in-a-lifetime post-COVID specials, the South Africans that have the means, or who can access the means, will be jetting off to the four corners of the Earth. It's just the way we are.* (BB2)

Another respondent affirmed that the growth experienced in the first couple of months after the reopening of the tourism sector had resulted from the hard lockdown, during which time people had been forced to remain indoors for almost three months:

> *And like I said, in the beginning, it was a bit more, but now, slowly, going back to what it was before, I think that was part of being tired of being [at] home.* (BB12)

Tourism businesses introduced various responses to the new tourism environment and domestic market. Increased marketing, particularly on different social media platforms, was found to be the most widely used tactic for responding to the new COVID-19 tourism market. Many respondents explained that advertising price reductions was frequently done, especially after the move to level 3 of the lockdown, when domestic travel was permitted in South Africa:

> *We did try to milk it out on different social media, like Instagram and Facebook. We do have pages on both social media. We also did good business [on] WhatsApp, so it's easier for the people to connect us.* (BB18)

> *After level 5 lockdown, we decided to introduce a concept that would remind our clients that we are [i.e. were] still in business. So, every Wednesday we have a "pensioners' day", where all pensioners get free coffee and biscuits on the house.* (BB8)

The quotes support the above discussion in that the consumers showed an interest in being able to benefit from the reduced prices. In addition to gaining more awareness about the products on offer, the respondents used social media marketing to capitalise on the fact that domestic tourists are increasingly preferring to travel during the week, owing to many people working from home:

> *I have run a competition now to get people [to] be more aware of the lodge. And the other thing I've seen is that the midweek special is more famous this year than [it was] last year and [in] previous years.* (BB19)

Such a change in consumption presents new opportunities for certain establishments, which can capitalise on weekdays, for which there is relatively little demand. Arguably, the establishments concerned, particularly the accommodation service establishments potentially can capitalise on the possibilities for remote working, as Wi-Fi is readily available, which is of key importance.

Other business responses included expanding on the already existing offerings, with both the accommodation and the attraction sectors having adjusted some of their experiences. On the attraction, or activity-side some of the respondents explained:

> *We have introduced more offers and packages to attract local travellers, and [to] make our products stand out.* (BB3)

> *We've also diversified our product offering to include self-drives. We allow people to come and drive around on their own, [showing that] we've adapted [to the changing situation].* (BB10)

> *We have had to cancel some activities, due to social distancing rules, [so] we have diversified our offerings to fill the gap of the cancelled activities. … We no longer ride the elephants and instead offer a nature walk with the herd instead. We offer self-drive activities and we offer game-driven activities, which we never offered before. We have had to stop swims in the dams with the elephants, but now do an elephant wash-down.* (BB1)

Largely, the adaptations involve limiting contact with tourists and allowing their self-exploration of the attractions. Doing so is in line with curbing the spread of the virus, as well as with protecting both the staff and the visitors from infection. From the above examples, the visitors are still able to consume the primary offerings of tourism attractions. On the accommodation side certain respondents disclosed that they had restructured the nature of their businesses. One respondent stated that they had changed their establishment from a bed and breakfast to a guest house:

> *I have opted to convert my business from a B & B to a guest house. In order to reduce the cost of breakfast, we now offer breakfast upon request.* (BB5)

Certain respondents saw advantages in shifting to a self-catering guest house because of the less direct impact of the government regulations such as the alcohol ban. Other respondents had begun renting out their accommodation for longer stays, explaining: "*We're developing more caravan spaces for people to stay up to three or four months"* (BB13). One respondent was considering even the option of renting out some rooms to students in the area.

The respondents highlighted their changes brought about in some of their operations, such as introducing check-in processes to reduce touchpoints, for instance:

> *Because of COVID, they [the guests] rang the bell at reception, and then I would meet them, say in the dining area of the guest house with forms and masks, and everything. And they can fill in the form, and I'll receive it later, hand over the keys and let them go. We normally are received in at the reception area inside the main house, [and we] gave them a whole tour, the speech and everything, so now we cut it short.* (BB15)

In addition to the above, other safety protocols followed by some of the respondents are extending the period between checking-out and checking-in times for the next guest. One respondent explained that the longer time involved than had been the case in the past allowed for thorough cleaning and disinfecting of the bedrooms.

For those enterprises that primarily had been reliant upon a larger cohort of international as opposed to domestic visitors different responses were observed:

> *Yes, we have started offering [a] guided wildlife tour; it's a 90-minute educational tour. This only started in December, and because it was the school holidays.* (BB16)

Understandably, the above was a consequence of the closure of the borders. While the situation offered an opportunity to gain entry to a new market, the owner of the establishment explained that the locals had little interest in the nature of their experiences, as it was volunteer work. A transition to offering online tourism experiences was only recorded for one establishment:

> *So we've gone online; we do our game drives online, where we also get the opportunity to educate our clientele about the African safari.* (BB10)

Indeed, the limited response of offering virtual experiences points to the fact the majority of Bela-Bela establishments still depend on face-to-face interactions. Potentially, however, this might increase their vulnerability in terms of the several changes and adjustments made by government to mobilities and movement restrictions.

14.1.3 Supply-side challenges and opportunities

The COVID-19 pandemic has presented many difficulties for Bela-Bela tourism establishments in terms of challenges of adapting to the shifting environment. Overall, the most significant business challenge for these businesses relates to finance.

> *The biggest challenges would be financing. We have to pay for everything, so there is no business if there are no funds.* (BB2)
>
> *I have had to compromise my savings in order to save the business, and now I'm bankrupt and in debt. This has forced me to release my staff.* (BB4)

Another manager of a tourism establishment stated:

> *You know, there is no chance for us at this time, because we don't get people and [therefore] generate [no] money. As I said, we have to pay the municipality, staff, the internet, and so on, yet we don't generate any income. We [are] running on a minus.*" (BB19)

With the COVID-19 impacts on decline in the economy as a whole this has reverberated into Bela-Bela tourism enterprises:.

> *So, people don't have money for leisure – they struggle to survive. So, the last thing they will do is … go … on vacation. So, that has a big impact on us, for the side of [that on which] everything was closed and [for] the other side of the financial impact [that it has had] on people*. (BB20)

The easing of some COVID-19 regulations presented opportunities for some tourism establishments to reopen, as long as their system of enforced mask-wearing, social distancing and sanitisers is in place. This said, the Bela-Bela respondents pointed to the increased costs for running their business:

> *Every time we have visitors, it means more maintenance. We need to make sure that our chalets are clean and fogged every time, [so as] to ensure that everything is up to code.* (BB12)

Tourism businesses are thus negatively impacted by COVID-19 both in terms of reduced visitor numbers and the increased costs of providing hospitality or serving the cohort of tourism arrivals. Further adding to the burdens on the managers and owners was the refusal of some tourists to adhere to basic COVID-19 regulations:

> *They [the tourists] mostly do outdoor experience[s] with us, like sliding on the zip-line. So, what happens is that people are complaining about wearing masks. If I tell people they have to wear masks, they turn away, so we've also lost business that way, but, unfortunately, these are the protocols we've had to follow. We can't bend the rules to [i.e. for] anyone.* (BB12)

Further, the fear of travel was noted to be a prominent challenge identified by the respondents, with one explaining that "*because of the second wave, people are scared of travelling. We follow all the protocols* *and everything here, but that means nothing if people are afraid to come*" (BB14). The rising number of infections and deaths has created some fear regarding travel which has adversely impacted on tourism establishments in Bela-Bela. Although local businesses have had to focus on creating safe environments for their consumers, the fear of travel remains a major barrier in terms of maintaining the business operations of many tourism establishments.

Moreover, interviews with the representative of a well-established resort in the area highlighted the changes that needed to be made in terms of online booking as having been a further challenge:

> *Our Waterpark is, in large part, aimed at the day visitors' market. This market simply arrives, pays and enjoys the day with us. Now, we have been forced to go online with the market and educate an entire market segment, to prebook and prepay online, to avoid the disappointment of travelling all the way and not being able to enjoy the facility.* (BB2)

During 2020 online booking was strictly enforced owing to the need to manage the number of people on the different premises.

Whether new opportunities have come into being for domestic tourism was debated among the respondents. On one hand, a few were of the view that domestic tourism might pick up and because Bela-Bela is an affordable well-established holiday destination for domestic tourists:

> *We're fairly close to Pretoria, Johannesburg. When we, the people, like to travel a lot to come to view nature here … as well as [to] visit the hot springs and it's cheaper. Bella-Bella is cheaper than Durban [and] Cape Town.* (BB19)

On the other hand, most respondents expressed the view that the economic turmoil caused by the lockdown had led tourism to become a luxury that people could no longer afford. For example:

> *We … did get quite a drastic change in visitors due to COVID, … having it such a huge financial impact on everyone's jobs. A lot of people lost their job, so they don't have income. That's why there was [i.e. were] a lot of people who couldn't … afford to do something extra other than rather … supporting their family.* (BB18)
>
> *Well, as people's budgets tighten up, we are seen as a luxury item. People were happy to go away to a reserve, but to spend on luxury items like accommodation and spas … I see even more pressure on us.* (BB3)

The above aligns with the arguments on the financial impact that COVID-19 has had on employment and on national economy as a whole. The focus of many surveyed businesses surveyed thus was on survival, and not on expansion, a view presented by many of the establishments:

Well, we said to drop the rate right down to the bone. We've cut our rates just to survive. And no more upgrading, no more expansions, no more funds going for, you know, developing the business anymore. So basically, it's just survival. (BB14)

I am not thinking of expanding. I also believe that I need to keep it small, in order to keep it crisp. I would rather focus on improving what I have to make it more attractive [than try to expand]. (BB7)

All interviewees revealed their establishments to be barely surviving, as they still had to pay their fixed costs, while not generating much (if any) income. On the matter of expansion, the respondents opined that expansion and future developments could only happen once there was a positive change in the fight against COVID-19. In fact, most of the respondents expressed their inability to make any expansion plans when lockdown levels 4 and 5 might be looming, owing to the possibility of a resurgence in the number of positive COVID-19 cases:

… you're following everything that's going on with COVID; there is, apparently, a rumour that is going around also that there's a possibility of a third wave that comes [i.e. will come] again. (BB14)

Overall, the impact of the COVID-19 pandemic on tourism enterprises in Bela-Bela shows the catastrophic conditions that forced them to downscale their operations. The managers had to identify the non-essential services and those areas with a significant decline in demand. Such areas were scaled down to minimise the losses incurred, by means of reducing the amount of unnecessary or redundant equipment, thereby lowering the costs involved. Measures taken included limiting the number of guest rooms, closing the swimming pools, and reducing expensive, but underutilised, facilities, like washing machines. The interviews showed a positive association between business sustainability and the financial challenges. One respondent stated as follows:

We've closed up most of our private on-suite rooms and put in permanent residents, to keep something going. Oh, so, basically, we've halved the facility, and that means less staff, fewer expenses. But there is no turnover. So everything, you know, we've gotten rid of most of our commercial vehicles, little mini-bus classes for business to get people from the airport. We've had to get rid of that as well. So, everything has an impact. (BB14)

Another area requiring reduction was the labour costs. Specific measures in the area included negotiating salary reductions and requesting employees to clear their outstanding leave. This is reflected in the following comments:

We were able to claim TERS for the employees. But all of them are on short term now. What do you call it? Only work certain hours, because it's not back to normal. So, all of them, they're not getting their full pay by the hour. Sometimes not even half of their salary. (BB13)

Many respondents indicated that, while the above had been taken as provisional reduction measures, the effect of COVID-19 presented unforeseen circumstances that forced some of their temporary staff to be laid off and those who were permanently employed to be retrenched:

> *We did have to cut down on our staff members. Unfortunately, these are the worst job losses as well, due to no income coming in to support so many people financially.* (BB18)
>
> *We've had to reduce the number of waiters, due to the pandemic.* (BB8)

Another participant at a wildlife attraction asserted:

> *We have had to retrench staff, due to the uncertainty of the sector and decrease in demand. Financially, we have run up many debts to stay afloat, keeping the business going and staff employed. We've had to reduce staff work hours, which brings uncertainty for them and stress.* (BB1)

Moreover, the establishments that had wildlife as a major tourist attraction revealed that the pandemic had had a major effect not only on maintaining the animals but as well on their overall well- being:

> *We did have to downscale on some of the animals, because, obviously, every animal needs food every day. They eat grass, and the predators need meat. Moreover, unfortunately, if you have a lot of animals, it's a lot of food that you have to get, and it is quite expensive to get it as well. So, the alternative way to fix the problem was to downscale on the animals.* (BB 18)

In the light of the above, the dire financial implications imposed by the pandemic have proven to have had a detrimental impact on the tourism establishments in Bela-Bela. As a consequence of the above, many establishments have had to resort to downsizing.

Cooperation between the local companies was another theme in the interviews. Arguably, half of the participants attested that they collaborated with other tourism stakeholders, so as to enhance their tourism offerings and reduce their operational costs, thus making them sustainable tourism operators:

> *We try to collaborate as much as we can with our local attractions and restaurants, such as using our local Bela food delivery, combining packages with game reserves and other attractions.* (BB3)

Other respondents cooperated in terms of marketing and joint bookings:

> *Yes, we have partnered with neighbouring accommodation facilities on joint marketing and joint offers, such as Zebula and Mabula. This really helped to save the little money that we had left.* (BB1)
>
> *We do work with the lodges locally, and we do try to give them a discount for the people that stay at the lodges. So they book through the lodge, and we will then give a discount for the drive for the people that stay at the lodges. We also try to cooperate with other animal-based tourist attractions [that are] around, like Zebula and Adventures with Elephants, trying to refer people who still like to do other things around here to them.* (BB18)

It is important to note that the partnerships mentioned did not directly result from the presence of COVID-19, but, rather, were an activity that had been practised before the pandemic. Conversely, other respondents stated that there was no cooperation with other local businesses. Some of the reasons mentioned included that businesses were reluctant to work with their 'competitors', that there was no help available, and that it was an added expense to have to work with other businesses that were not financially feasible at that stage. Others respondents expressed their hesitation about collaborating with other local establishments, because they were unsure whether they would receive any return on their investment:

> *So we always thought of it, we even thought of making compact deals to see if we can get more people. I just think everyone is scared of doing things, like cutting too much on costs and end[ing] up making nothing.* (BB12)

In general the reluctance to cooperate, and the perception of receiving low (if any) return on investment, was based upon the dire financial state of the establishments in Bela-Bela. For some enterprises cooperative relationships with other the local businesses did not produce the intended outcomes. For example, one respondent stated:

> *I'm part of Limpopo Tourism and also part of the Love Bela-Bela group. We used to have a tourism organisation that was aimed at coming up with strategies to assist with the mental health of guest house owners during the pandemic. However, it didn't get off the ground. (BB7)*

14.1.4 The role of government

As a whole the respondents pointed to the negative effect that the existing and changing government regulations have had on their businesses stating: *"taking away travel and all those regulations makes the hospitality industry unsurvivable*" (BB14). The reopening of the tourism sector meant that various changes had to be implemented to curb the spread of COVID-19, most notably the essential safety protocols that they had to implement which meant limiting the numbers of people staying at their establishments. For instance, a respondent from the accommodation sector said: "*We have now opted to accommodate a limited number of customers [so as] to adhere to the COVID-19 regulations*" (BB11). From the side of attractions offering nature-based experiences, the regulations resulted in "*downscaling on the number of people that … [go on] … the game drive, for purposes of social distancing and staying safe*" (BB18). Other attractions and accommodation establishments restricted the number of their day visitors:

> *We chose not to take money from day visitors, because you don't know where … [they are] … coming from. That was also a big income loss.* (BB13)

In addition to placing limits on entry numbers, some respondents mentioned that they had had to rearrange their open areas (such as restaurants), so as to ensure adequate spacing between people. The manager of one caravan park mentioned: "*We split up all the bathrooms for them, which means we can only accommodate a few caravans*" (BB13). Another interviewee at an attraction in Bela-Bela stated:

> *Yes, yeah, there are a lot more spaces left between people. Obviously, it's quite hard to separate a mother or a son, or, for example, a couple, [as] they would still try to sit together. But that is understandable, because they do stay at home together. … we just try to keep … as much space as possible with [i.e. between] different people. Yeah. For example, two different families coming together, we'll try to keep them apart as much as possible.* (BB18)

Considering that the establishments mentioned were closed down for months with no income and with continued costs, the additional measures, such as restrictions, became an extra financial burden on the businesses involved. Further, ensuring the safety of both the staff and tourists was an added cost for the establishments concerned:

> *We get a guy that comes here to do fogging, every week, or every two weeks, depending on how busy we are. To make sure that the place is sanitised and all [the] extra things that come out of your pocket [is expensive].* (BB12)

The closure of both the national and the provincial borders was frequently mentioned in the interviews. Specifically in terms of the provincial borders, many of the respondents argued that the closure had severely hampered their businesses as Bela-Bela is heavily reliant on tourists coming from Gauteng. The few respondents who spoke on the national borders explained that, while the domestic market seemed to be picking up, they were not making as much money as they could have done, owing to their high-spend international visitors not being able to enter the country.

> *Because [of] borders and opening and closing, they don't want to invest in … booking, [meaning] the volunteers. [They] stay with us, so the ecotourism I was promoting is suffering.* (BB16)

Another establishment mentioned that those visitors who had been visiting during the week were from the above establishment, on which they depended.

> *Down the road, there is a place called Bambalela, a monkey sanctuary. So they get a lot of international volunteers, and they used to send us a lot of clients, so we're losing from that.* (BB12)

Arguably, the closure of the borders poses a major challenge to businesses, of which many were found to be barely surviving. Some respondents pointed to the adverse impact that the mere announcement of the presidential address had on bookings and postponements, as, for instance:

> *We have tried. We're trying to concentrate a bit more on the marketing. But we can only do so much. And then it's all about waiting, too, for the guest[s] to respond. And all we are getting is,*

> *we're getting responses on our marketing. But if we do get a response, they just say they can't pay a deposit until the president makes the country open. They [are] leaving it to the last minute, and that's usually your cash flow for the following month.*
>
> *Completely, every time there's a new protocol, everyone gets afraid from the start, so they stay at home because of being too scared of what the implication of the government speeches are.* (BB14)

Evidently, the market reaction to the new regulations and to the presidential addresses was a frequent feature in the interviews, with one respondent stating: "*This market also reacts very quickly to changes in government regulations, e.g. as soon as regulations are tightened, bookings get cancelled*" (BB2). Travellers faced some anxiety, due to uncertainty concerning the present COVID-19 environment, and the implications of the presidential addresses (on COVID-19) on travelling. The postponements experienced severely hampered the already fragile financial sustainability of tourism businesses in Bela-Bela. The above was already evident in the terms used to describe the impact of COVID-19. Further, the restrictions placed on swimming in December 2020 were of particular concern to most accommodation establishments in the sector, as, for example:

> *Because, I mean, people were coming here to go swimming, and they can't. And we're [a] very small guest house. But I only have four rooms. We don't have a swimming pool on the premises. They wanted to book here specifically in advance, because they wanted to go to the Forever Resort. So that was a huge problem for us. Because, I mean, we had a cool idea last year, because COVID and December was one that we were supposed to make a little bit for it. But yes, unfortunately. So, with that announcement, it was absolutely horrible.* (BB15)
>
> *The only thing is, if we have more than one group booked, they can't really use the swimming pool, which is kind of one of the main attractions, at you know, lodges and guest houses. So people have been put off by that.* (BB11)
>
> *... the swimming pools have been opened. Most of our guests want to visit the Forever Resort, so we had many cancellations and others postponed, but now that they have adjusted the restrictions, there is hope for us.* (BB7)

The last quote spoke to the amendment of the regulation, made in January 2021. The Waterpark at the Forever Resort is a major attraction in Bela-Bela. Discussions with managers and guest houses in the city centre highlighted that their guests often selected their establishment, owing to its proximity to the resort. Accordingly, the various changes imposed by the resort, in compliance with the government regulations, seemed to affect the nearby accommodation establishments negatively.

The respondents, when asked what support would assist their establishments, put several suggestions forward, including revised financial aid, marketing and infrastructure. At the scale of the local government, assistance with the municipal costs was affirmed to be important for the sustainability of the establishments. Many respondents mentioned that they needed some reduction or relief in such regard.

The marketing assistance that was required was twofold. Firstly, the respondents explained that the provision of more and clearer road boards would aid in increasing their visibility:

> *They could allow and support marketing opportunities in town, to promote tourism offerings in the area. Such as a large sign with a map to the area, a website with links to the facilities in the area. Have a functional Tourism Office in town that constantly informs people [of] various accommodation options in the area.* (BB7)

> *As our marketing side, like road boards, and maybe advertisements, around town; that would be absolutely fantastic, because that would actually help the town grow … let a lot of visitors know that there is a zoo in town.* (BB18)

Secondly, the respondents affirmed that the local government should look into marketing smaller tourism businesses in the area, with one stating that there should be "*more marketing of small local attractions to help with [handling] COVID*" (BB1). Training and the marketing of small businesses might aid in their recovery and adaptation to the 'new normal'.

At the level of the national government, the respondents pointed to the bad roads in the town, stating: "*Improvement of [the] infrastructure in the area would be nice; this will attract more tourists to the area*" (BB8). Other respondents stated:

> *I don't know if that they can … fix our road. That would help a lot. I don't know if they can be involved in other way[s], except make the road better.* (BB17)

> *The national government should focus on maintaining the infrastructure to attract more tourists in [i.e. to] the area.* (BB4)

> *They could also spend money in the most important aspects of town, in order to ensure tourist[s] want to visit, i.e. road infrastructure.* (BB1)

From the researchers' observations, the roads in the town had many potholes, and some of the roads to the attractions outside the city centre were neither paved nor tarred. Further, many respondents highlighted the fear that was faced by many tourists in travelling. Accordingly, it was found that the respondents required the government to support the local tourism industry by addressing their fears which were associated with travelling. Overall, financial assistance was most commonly stated as being the most important support needed for survival during 2021.

14.1.5 Business Prospects

Overall the 20 Bela Bela tourism respondents were not confident of their businesses surviving the next 12 months. Only three of the interviewees stated that they had managed so far and could continue with limited or no support for another year. Two of these were accommodation providers and one was a café.

We have managed to make it this far with limited or no support. We will survive the coming 12 months as well (BB2).

I don't believe in acquiring debt, so whatever I do here, I do it cash. I have learnt to accept that when you want to do something you have to first accumulate the funds. So with that said my business will still be operating in the next 12 months (BB7).

Without the support, we will still be able to keep the business afloat, as we are considered as essential service providers (BB8).

Seven of the interviewees were hopeful that they could remain open for the coming twelve months, however, it is apparent that most of these businesses already are struggling so further restrictions or limits on the ability of tourists to travel will make their businesses unsustainable. The majority of these respondents were accommodation providers:

I always aim high, therefore I am hopeful that my business will still be running in the next 12 months (BB5)

We hope to still be in business by the end of the year (BB6)

We shall remain hopeful and pray that we don't shut down for good (BB9)

We have survived thus far, we hope to generate income through our domestic market… it is what it is I guess (BB10)

Yes... And we got some groups and stuff, they make they make bookings now. There are groups always coming in like Association caravan association, we've got a lot of them that were coming out four five times a year. We've got 6 groups and all of them are making bookings but will they be able to come this time? That's another story. The bookings been done, but what happens if they close the borders again? All of them all on that side, Gauteng. I just believe that corona will die a quite death or I don't know (BB13)

Well, we're gonna just try to keep it going. We agree, we're trying to just keep what we have. And, and the prospect is that, at the end of the day, we can operate at full capacity again. And once we operate at full capacity, we need to look at having a best standard for our clients (BB14).

The remaining interviewees admitted that they were already struggling with debt due to revenue being down by as much as 65% in the case of one accommodation provider. In addition, the ability to pay staff or look after the animals in the case of the three animal tourism attractions was a challenge in the current economic climate due to the pandemic. Some tourism attractions admitted to already being closed and most conceded an inability to continue operating beyond the short term.

We are literally operating from one month to the next, we will first have to retrench and if this strategy does not work we may need to close down (BB1) Adventures with elephants

To be honest I currently don't foresee my business still operating in the 12 months (BB3)

I've accumulated more debt and I can't run this business any longer, I'm now forced to close down or sell (BB4) Villa manor and spa

Geez, not good. I mean, our revenue so far, for the 2021 financial year is down about 65%. So if it carries on how it is now, it's just really not sustainable (BB11).

14.2 Findings: Bushbuckridge

This section addresses the case of Bushbuckridge and its surrounds, an area which is not close to any of South Africa's major metropolitan centres. The predominant type of tourism prevalent in the area is nature-based tourism, most of which feeds into the adjacent Kruger National Park. As one of the top tourism attractions in South Africa, both for domestic and international tourists, the area has clearly been severely impacted by the pandemic. This section of results assess the influence of COVID 19 on a number of businesses in and around Bushbuckridge. It does so by first discussing the characteristics of local businesses included in the study and an very brief overview of the impacts of the pandemic on these businesses. It then goes into adaptation strategies implemented by these businesses given the current climate, particularly the role of the domestic tourism market. Challenges and the possibility of potential new business opportunities are interrogated. It then goes into the role of government and its impacts as well as potential support and interventions which these businesses would require both simply to survive and also to assist in adapting to the new domestic tourism market.

14.2.1 Overview of businesses and impacts of COVID-19

The businesses included in this study consist of a range of tourism operators based in and around the Bushbuckridge municipality. The study encompassed tourism operators located within the Bushbuckridge municipality and those in bordering towns, which feed into the Kruger National Park and from which the majority of staff is based in Bushbuckridge. This included towns such as Hazyview, found just over the border of the Bushbuckridge municipality, as well as operators with main offices in Mbombela but which operate in the lower Kruger region, serving parts of the park found within Bushbuckridge, most importantly Paul Kruger gate and Skukuza. Of the 20 businesses which were interviewed, most (10) operate out of

Hazyview, five were located directly in Bushbuckridge municipality, while the remaining five have their offices based in Mbombela. The majority of businesses interviewed were accommodation establishments, mostly lodges due to the nature of accommodation in the area, with another two hotels, one guesthouse and one backpackers. Interviews were also conducted with representatives of two major private game reserves which border Kruger National Park, each of which houses several camps with various accommodation offerings. Other than accommodation, 7 businesses were safari and tour operators (with some overlap with accommodation operators), two provide wildlife interactions and one restaurant was included. A profile of the businesses that were interviewed in the Bushbuckridge cluster is given on Table 6.

Table 6. The Bushbuckridge Sample of Interviewed Enterprises

Identifier	Type of Establishment	Years in Operation	Number of Permanent Employees
B1	Spa	10	4
B2	Wildlife Interaction	12	40
B3	Hotel	2.5	20
B4	Lodge	15	1 (previously 7)
B5	Wildlife Interaction	12	5
B6	Lodge	12	7
B7	Backpackers	10	5 (previously 10)
B8	Safaris/Tours	27	1
B9	Tours; Guesthouse	6	1 permanent, 3 freelance
B10	Game Reserve	59	175
B11	Safaris/Tours	7	2 permanent, freelance as needed
B12	Lodge	11	28 (previously 38)
B13	Safaris/Tours	15	1 permanent, 14 freelance
B14	Safaris/Tours; Lodge	2	Lodge - 28 permanent (previously 31); Safaris - 23 permanent, 10 freelance
B15	Safaris/Tours	11	11 permanent, 6 freelance
B16	Lodge	15	17
B17	Restaurant	2	2

Identifier	Type of Establishment	Years in Operation	Number of Permanent Employees
B18	Lodge; Restaurant	Restaurant - 6 months; Lodge - 2 months	170
B19	Hotel	10	150
B20	Game Reserve	20	240

Source: Authors

It is evident from Table 6 that there was a range in terms of years of operation of the various businesses, with one in operation for 59 years and another having opened as recently as December 2020. Half of the respondents have been in operation for approximately 10-20 years, with another three over 20 years and the remaining seven operating less than 10 years. The sizes of the operators, in terms of staff, also varied significantly albeit these numbers have changed since the onset of the pandemic. Some have employee numbers as high as 240, while several only have one or two permanent employees (these are largely owner operated). The nature of several of these businesses mean that they engage a number of freelance staff, primarily in the form of game rangers and safari guides.

The overall impact of the pandemic from the perception of the Bushbuckridge cluster of respondents was overwhelmingly negative. Several respondents using words such as "*disastrous*", "*devastating*" or similar such phrases. Others included phrases such as "*unfair*" (B16), "*life-changing*" (B7) or related it to their current financial status, for example "*loss of income"* (B5). In general, there was a clear sense of the severity of the impact of the pandemic on these businesses across the board. In the Bushbuckridge area the debilitating impact of the pandemic was exacerbated by the fact that most businesses are dominated by international tourists rather than the domestic market. Of the 20 interviewees only two had a majority of domestic tourists, namely a wildlife interaction and a tour guide and operator out of Bushbuckridge, who mostly takes local tourists to neighbouring countries. Their share of domestic tourists were 70% and 90%, respectively. Among the remaining businesses, a significant proportion (8 operators) had upwards of 90% of their market share from international tourists. Another six enterprises said international tourists accounted for more than 80% of their clients while the remaining six businesses stated that international tourists accounted for between 60% and 80% of the clientele. Most acknowledged that, clearly, nearly all of their clients are now local. However, most said that this did not come close to making up for the missed revenue from international tourists. This is discussed in detail below, in the context of challenges faced by these businesses. Many respondents did, however, note that their products are simply not geared for the domestic market. One operator of safari tours stated "*South Africans like to self-drive and stay in the park. They don't want to pay for the safari experience*." (B13). This sentiment was echoed by other safari tour operators who indicated that despite significant price reductions, they struggle to get South African clients. "*Even if you try, South Africans usually self-drive*" (B11). In addition, some of the more high-end lodges noted that South Africans are visiting the area because they have no other choice at the moment and that it probably will not sustain into the future, saying "*Our current guests will probably end up going overseas in the future*" (B18).

14.2.2. Supply-side response to changes in demand

Respondents were asked about their adaptation strategies in response to the pandemic, specifically the need to change or adjust their offerings, both in light of the pandemic and re-orienting their products towards the domestic tourism market. The primary adaptation strategy among businesses has been to reduce prices. The extent to which this was done varied based on the products offered. One respondent stated "*We now have a very domestic rate*" (B19). In addition, one 5-star lodge struggled in figuring out how low to reduce their prices for the domestic market: "*Once we introduced domestic rates, the lodge started being booked. Domestic clients, though, only started book once we hit the 'sweet spot' in terms of price reductions*" (B18). Another said "*We've created lower rates that locals bite into*" (B19). Some have introduced self-catering units. "*We have introduced self-catering units specifically catering for locals*" (B6). Several respondents noted issues faced in adapting their products, particularly prices. "*Originally we gave large discounts for our luxury accommodation. One problem was the quality of guests really deteriorated, causing major problems. Once the police actually had to be called. Now we just give free upgrades on arrival. This has been really beneficial for word of mouth marketing. This usually gets mentioned in our reviews"* (B12). The issues surrounding problems with 'specific types of guests' was echoed by others, "*Specific self-catering units are reserved for local tourists as they are rowdier*" (B6). Arguably, all business have had to adapt their business operations to the safety protocols: "*We are very aware of COVID protocol*" (B19). The challenges with this adjustment are discussed below. However, a number of respondents noted that tourism in the area is very COVID-friendly. One respondent stated "*We have separate suites and outdoor activities which made it easier to adhere to protocols*" (B20). Another said that they have had to adapt somewhat stating "*A little bit. COVID isn't as intense in this area [the Lowveld]. Everything is open, there are less cases here*" (B19).

Some establishments stated that they have been able to use the South African market to experiment with different approaches "*We've changed meal format from Breakfast, Lunch Dinner to Morning Tea, High Tea and dinner - will probably keep this in the long run as it seems to be working better*" (B10). Another proceeded with the building of the guesthouse because she saw the opportunity for potentially have long-term stays of people working remotely. "*I can also rent the guest house if needed, monthly*" (B9). One of the budget accommodation operators, who runs a backpackers, said that they built some facilities to accommodate a wider range of domestic tourists, since that market was increasing. "*We are now trying to accommodate local business travellers with wifi in order for them to be able to work while staying on the premises*" (B7). Several others discussed how they adapted their marketing strategies and gear it much more towards the domestic market, for example "*Marketing has been difficult as we originally oriented all our marketing towards the international market and have had to completely re-adjust"* (B18).

14.2.3 Supply-side challenges and opportunities

In terms of primary challenges faced by local businesses in adjusting their product offerings, financial implications were the most prominent. Some noted costs caused by safety measures. "*The cost implication of safety protocols are another issue - the cleaning, PPE, etc.*" (B18). Another noted that it is not only the cost implications of safety protocols but also the time needed for cleaning measures in accommodation establishments: "*Cleanliness has a big impact. We used to spend 30 minutes cleaning each room each day, now it's up to 2 hours per room*" (B19). Many of the Bushbuckridge respondents indicated that staffing has been a major issue, as they have had to cut staff or at least decrease hours of remaining staff members. This is not only a result of the long closures during the various stages of lockdowns, but also the pressure to decrease prices. This was noted primarily by the lodges and up-scale game reserves. Given the price reductions, these enterprises are barely able to survive, yet alone produce profit, a situation that inevitably has caused many reductions in staff salaries or retrenchments. One game reserve respondent noted that they have currently decreased their prices by upwards of 65%, "*All of our services and products are geared towards the international rate. We are struggling to provide the same product at 65% off of the standard rate. Staffing issues are particularly problematic*." (B10) Although the game reserve operators are grateful for any business, including from the domestic market, for the long-term the situation is not sustainable, a sentiment that was echoed by many of the lodges.

Another challenge mentioned by several of the lodges is seasonality of the domestic market. The domestic market consists of sets of travelers: weekend visitors from Gauteng and visitors during holiday periods (most notably school holidays). "*Midweek is very quiet with the domestic market. Most are* *weekend visitors*" (B18). This is challenging, as the international market tended to make up for low periods between these times, as they would travel at different times and they would often stay for longer periods. One lodge respondent said "*South Africans struggling to book ahead because of lack of clarity with school holidays*" (B16). This is related, then to uncertainty in several aspects of life, preventing those from planning ahead. This is coupled with the clear fact that many people have lost part or all of their income as a result of the pandemic which has caused an economic crisis. Another respondent, a hotel operator, put it clearly "*There are two problems. One is that people are scared to travel. Two is that people are careful as to how to spend their money*" (B19).

Similarly, many noted the differences in booking patterns among domestic tourists versus their international counterparts. Several noted that South Africans tend not to book very far in advance. "*Another big thing has been the growth in last minute bookings. It used to not be possible but it's possible now because of COVID*" (B12). Another stated clearly that "*Domestic tourists are very last minute in their booking*" (B18). The problem businesses face with this, particularly in the current climate, is the need to ensure all the necessary preparations are in order for when visitors arrive. This includes ensuring adequate staff is available and on the premises: "*Staffing is a major problem with last minute bookings*" (B18). Then there is the necessary food and beverage requirements and that all facilities are adequately sanitized, among other concerns with last minute bookings, particularly when lodges are often sitting empty for periods of time. "*Last minute bookings are hard to deal with. We need to make sure all the necessary staff is available and that the facilities are properly sanitized. It's even hard to make food orders with last minute bookings when the lodge is largely empty*" (B16).

One interesting challenge, which was discussed in detail by an operator of safari tours was lack of information on the wants and needs of the Black South African market. "*If we are going to be dependent on the domestic market, we need to learn the Black market*" (B13). She noted the range of differences in their requirements and wants in terms of, specifically, nature-based and safari experiences, which differed significantly from their typical international market. One additional challenge she noted was issues with age restrictions implemented by SANParks on open-drive safari vehicles. "*There are major issues with SANParks regulations. Especially with kids - Black families with very young children. Children under 3 aren't allowed on open vehicles but the whole family needs to come on the trip*" (B13). It was also indicated that her company had been able to access marketing studies which had examined the demands of other population groups (specifically mentioning the Indian South African market), and that they had pretty extensive knowledge of both the English and Afrikaans markets, but that there was little information they could access on the Black South African market. This lack of knowledge was viewed as a significant challenge in trying to re-orient their products to cater to this emerging, and rapidly increasing, domestic market. "*Local cultures and beliefs are significant in understanding the market*" (B13).

In relation to opportunities for the demands of the domestic market the majority of respondents either said they do not see any opportunities, that the domestic market is unsustainable for their business models or that they are not really interested in expanding their domestic market once the international market is re-introduced. "*The lodge isn't built for South Africans. There's no self-catering. There's no braai areas. There's no TVs*" (B14). A few of the business, however, specifically noted an increase in the Black South African market, one which had not been as prevalent in previous years. One lodge manager stated: "*There has been a big increase in the Black middle class coming to the area*" (B12). Another lodge owner stated "*Yes, we have had an amazing upturn in Black South Africans.*" (B6) A third operator of safari tours elaborated in detail about the Black market engaging more with Kruger and outdoor tourism. "*The Black market is the biggest right now…They really like the Panorama Route, like opportunities for selfies. On holiday they want to relax*" (B13). She also noted that there were significant opportunities in particular subsectors of the Black South African market. "*A big market we've noticed is single Black women travelling in groups*" (B13). Others have been appreciative of the domestic market due to their role in sustaining the businesses during this time. Several indicated that they had not thought about marketing to the domestic market before but it is something that they want to continue in the future. For most enterprises, it was noted that re-orienting completely towards a South African market is financially unsustainable in the long term. "*All of our services and products are geared towards the international rate. We are struggling to provide the same product at 65% off of the standard rate. Staffing issues are particularly problematic*" (B10).

Another interesting development which was noted by an upscale game reserve, is that due to the price reductions for local visitors, they grabbed it as an opportunity to try out new products and changing products stating "*the South African market is sort of like guinea pigs. We have felt the freedom to try out re-orienting services and trying out new things, for example with the menu.*" At the game reserve and lodges it was noted that South Africans are quite vocal about their complaints and concerns (B10 and B16). This, coupled with the fact that many South Africans have had experiences at other "bush" accommodation or safari experiences, meant that the feedback can often been quite useful. Respondent B10 noted that the South African market was one they never really had to explore before but that they are now thinking of providing South African rates into the future, what they called "price apartheid." She said "*The South African market has been so good to us in our time of need that we need to really look at them in the future*" (B10). A game reserve respondent noted "*There are talks of how good the domestic market has been to us. We will accommodate the domestic market going forward*" (B20).

When asked if they planned to introduce any new products or offerings, the majority had no such plans. "*Not now. We are saving all our Rands and cents until the market opens up properly*" (B13). Many did indicate that they are re-orienting their website and marketing to attract more local tourists. Those who were introducing new products, in terms of the built environment, all had plans for expansion previously. A lodge operator, respondent B6 did, however, indicate repurposing some of their accommodation to allow for self-catering. Interesting, there were a few respondents who are in the process of introducing new technology products. A safari tour respondent is in the process of developing a travel app, whereby she can assist in planning trips and also do virtual guiding for those on self-drives. She also noted that she is trying to access the corporate market, as it is better for their retreats. Another game reserve respondent had introduced virtual safari experiences during lockdown and currently are maintaining a YouTube site which has grown exponentially and will hopefully encourage future visitors. "*We also utilized our existing YouTube channel and created content during lockdown called 'Rangers in isolation' this is continuing with 'Mala Mala Safari Moments.' We went from 27,000 subscribers to 125,000 subscribers during lockdown*" (B10).

Some respondents discussed ways in which they are trying to adapt technology to improve their products in the COVID 19 environment. The awareness of the contactless economy and a South African form of untact was clear: "*There is a lot of possibility with technology. No touch tech. We are looking into using your phone as a key to get into your room*" (B19). The same operator discussed the implementation of facilities for webinars and virtual conferences: "*We are looking into installing facilities at the lodge to host webinars*" (B19). Others are creating new products or looking into re-working previous products. A few are introducing more trips to places other than Kruger, such as Sabie, Graskop and Kaapsehoop. These are local small towns with interesting features or activities that they feel might be appealing to a domestic market which has, maybe, spent quite a bit of time in Kruger and in search of alternative experiences in the area. "*We're thinking out of the box. We've created a Kaapsehoop Escarpment Tour. The domestic market seems to like things like the wild horses*" (B13). Some are specifically catering to the Black market, which they said is a relatively new and growing market for safari tourism, especially into Kruger National Park. One tour operator with a guest house stated "*I'm now offering cheap day trips - into the park and other tours such as hiking trips… Trying to orient towards community members - they can at least afford a cheap day trip*" (B9). Another said that, if there are a certain number of guests, they are starting their visits to the park later, as they have seen that the market is seeking that type of experience. "*We are noticing that there is no demand for early morning drives for the black market*" (B13). She then discussed how the experience they offer is quite different. "*They want to stop often, walk around, take selfies…They are very vocal when they are 'done' and ready to leave*" (B13).

More, however, mentioned that they have had to downsize significantly in response to the pandemic. The majority of respondents indicated downsizing related to staffing. Several had to cut major portions of their staff, while many others have staff operating on part-time salaries. A lodge respondent stated "*All staff is on 50% salary and that's after staff were cut by 50%*." (B6) Other than that, some businesses have had to sell vehicles and some are on the verge of closing down. One of the game reserves has closed down one of their camps completely and currently only operates one of the three camps regularly. "*Currently only one camp, out of three, is operating regularly. One camp is completely closed and hasn't opened at all. The third camp is open as occupancy dictates*" (B10). Another said that they had to close down their restaurant because of a lack of demand, especially with the liquor bans. "*The restaurant was really struggling so we closed it*" (B3). Others noted that they have had to restrict the number of people which engage in certain activities. "*I have had to create limits on the number of passengers in the vehicles*" (B8). Many, however, said that they have not downsized or removed products. "*Not at all. That's why I don't want to go down in prices. I want to keep offering the same service*" (B4). Several respondents echoed this sentiment, stating that despite the drop in prices, they continue to maintain the quality of service. "*None of our standards dropped. We maintained standards with food, game drives, etc*." (B20). Another respondent stated that they had downgraded their marketing. "*Not really marketing to international travel anymore*" (B9). A further point brought up by one of the high-end game reserves is that they have had to cut their outreach community programmes: "*Local communities are very reliant on the lodges, not only for employment. All our community outreach programmes have been completely stripped*" (B20).

Some respondents reflected on the increase in comraderie and communication between local businesses as a result of the current pandemic and economic climate. Several respondents indicated the value of local enterprise cooperation and indicated aspects of increased communication between businesses which has been useful, "*Yes, it's a close community, sharing information on what's app regarding safety and regulations*" (B7). This said, there did not seem to be many ways in which local businesses are utilizing one another and repacking products to encourage tourists to utilize a variety of services in the area. This is likely related to the context of these businesses, many of which are in direct competition with one another (i.e. different types of accommodation, different safari operators). Some exceptions were observed in the case of one local spa operating out of one of the hotels. "*Our second branch is located at [a nearby hotel]*" Another operator said "*As part of our sustainability goals, we are trying to source locally, working with local businesses*" (B20). One problem is that many of the accommodation businesses also operate their own safari vehicles, minimizing their utilization of other safari operators.

Some, however, noted that the industry can be brutal in the area because of the competition. "*One in three jobs in this area is in tourism. It can be very cliquey and people go behind your back*" (B11).

14.2.4 The role of government

Respondents were asked about their perceptions of the government regulations during the pandemic. All but two stated that the government had negatively impacted their businesses, while one said there were some positives albeit it was mostly negative. Of the 20 interviews only one respondent (B19) stated that the regulations were positive.

When elaborating on these perceptions, respondents were asked about which specific regulations and in what specific ways their businesses were most significantly impacted. One of the most significant, mentioned by most Bushbuckridge businesses was the travel ban because of the area's orientation towards the high-end international tourist market: "*The travel ban itself was a big hit*" (B11). Most enterprises were significantly impacted by the international travel ban as nearly all businesses are overwhelmingly reliant on the international market. The interprovincial travel bans were also critical as the majority of domestic tourists to the area come from Gauteng. One of the two business which have a high proportion of domestic clients stated, the "*interprovincial travel ban was the worst for us. We depend primarily on the Gauteng market*" (B5). In addition, the alcohol ban was mentioned by many as detrimental to their businesses. One respondent said "*It's a holiday destination. People want to drink. Especially South Africans*" (B18). Some encountered issues with guests demanding alcohol. "*The alcohol ban was also significant. Level 4 was difficult. Guests would arrive thinking we would serve them alcohol*" (B20). The one respondent who maintained the regulations had been positive was from a chain hotel, which is interesting because their insight was quite in contradiction to other respondents, the majority of whom are private small businesses. This respondent stated "*The tourism industry has been helpful with licensing and red tape. They are actually even throwing business our way*" (B19).

Questions about support interventions and government elicited mixed responses especially on the future of these tourism businesses, what sort of support and interventions businesses would require in order, simply, to survive the pandemic, but also, specifically, in terms of re-orienting towards the domestic market. There was a general consensus that the industry is being over-looked by government. The operators of a game reserve expressed the viewpoint that :"*Government needs to be open to discussion with the tourism industry. We feel we are not being listened to. The industry feels neglected*" (B20). This sentiment was echoed by many respondents who demonstrated a general lack of faith in government intervention overall, with one respondent stating that in response to tourism support, government is "*making a lot of noise but not actually doing anything*" (B9).

Some businesses provided broad answers on what would be helpful forms of support, the most prominent of which related to financial assistance. They were, however, asked more specifically about possible assistance, first from local government and then from national government, though responses to this were often blurred. From local government, the majority of responses were related to breaks on rates and taxes, where applicable, and an increase in local marketing. Many respondents, however, felt that local government has little authority or capacity to do much that would actually help tourism businesses, with respondent blatantly stating "*Local government can't do much*." (B5) Similar sentiment was recognized by others: "*Tax breaks would be good. But I don't think that is going to happen*" (B20). Another noted a series of issues with service delivery in the Bushbuckridge area: "*Sewage and roads, service delivery are in disarray in Bushbuckridge. We've been here for 11 years and have tried to get assistance but to no avail*" (B12). The biggest local concern, among nearly all respondents in the area, was with the quality of the roads. Although they were asked about infrastructure assistance in the context of national government support, there was a clear consensus among all businesses that the state of the roads in the area was incredibly problematic. This issue has been exacerbated by the recent excessive rains, coupled with impact from tropical storm Eloise, which hit the area in early 2021. However, once again, there was little faith in local government. "*Roads need to be fixed. But I don't see that happening*" (B3). One respondent suggested that even something as simple as painting speedbumps would be a major help in getting, in particular, to Numbi gate, located just south of Hazyview. "*Our biggest wish is to engage with the local municipality to paint the speedbumps on the way to Numbi gate. This isn't just for us but also protects the local community*" (B13). Others mentioned issues with power outages. "*Eskom! Keep the power on and at a lower rate*" (B5). Another said "*Infrastructure…Roads! Power! We are often running on a generator which increases expenses*" (B20).

Another support intervention identified as essential by several businesses related to government and marketing. Many of the businesses response to this question was on a broader scale than specifically domestic tourism, though it is worth noting. A game reserve respondent "*Our biggest concern right now is the press coverage around the South African variant. We need a major PR campaign to show the world that the variant is not that bad, that South Africa is handling the virus relatively well and that our tourism products are very safe.*" (B10) This viewpoint was echoed by other product owners in the Bushbuckridge area. It was considered that SA Tourism has not been proactive in their marketing strategies. "*South Africa is a good place to travel for COVID…[but] SA Tourism have done sweet b… all to show how compliant South Africa is and that the actual rates are much lower than the rest of the world*" (B13).

Although they are grateful for the domestic market, the quantity and costs of these operations simply will not survive without the international market. "*We need better marketing of the success of South Africa's response to COVID. We need to tell the rest of the world…We need to demonstrate that a lot of the activities are "COVID friendly", we're reducing the number of passengers on game drives, etc*." (B12). This was elaborated on by suggesting incentives for travel. "*South Africa needs to get its butt into gear with incentives for travel.* " (B12).

In terms of support from national government beyond infrastructure and marketing, the primary request among these businesses was financial relief, in one way or another. To further this point, when asked about which support or intervention would be the most important in the short-term (the next 12 months) nearly all businesses stated that financial assistance or relief is, by far, the most important support needed in the short-term, in order for them simply to keep afloat. Without support, many tourism employees are having their salaries cut significantly or otherwise have been retrenched. A safari tour operator stated "*We have no money to pay our staff and they are literally starving.*" (B15). Others suggested alternative mechanisms for supporting businesses financially, for example that income tax breaks for tourism operators would be very helpful. "*Reduction in tourism taxes, taxes for tourism businesses*" (B7). A few mentioned the concerns over payments, specifically for cars and other fixtures needed for their businesses. Another safari tour operator said *"Lots of people had to sell vehicles because they couldn't afford the payments."* (B 11). Another said "*Any financial relief - car installments. I'm currently running on negative*" (B9). Similar sentiment was noted by B15, who suggested government put "*pressure on financial institutions to institute a total payment holiday for at least 12 months*." Another respondent – a product owner on wildlife interaction - noted that a break on rates and taxes, though it does not affect him directly, would allow landlords to provide breaks on rent.

There was a general distrust of the government and government support with one stating that "*There's a lot they can do. Give more thought to tourism in general but it has been neglected so far*" (B20). Businesses provided a number of different suggestions as to how the government might be able to assist in supporting tourism businesses financially. Many of these included direct financial assistance or government subsidized loans. All but one of the businesses interviewed were white-owned and all but three were SMMEs. Nearly all SMME owners (including the black-owned business) said that they struggled to get government relief. "*I'm currently running on negative. Didn't receive the PFF funds*" (B9). Those who did receive some compensation said that it was either minimal and not what was promised, many of who said that it did not come close to covering operating costs, let alone money to support staff. Some of the responses were as follows:

"*The government is completely unrealistic about the running costs of tourism establishments.*" (B12)

"*NFTGA funding was meant to be R30,745 per guide. We only received R1,500 for three months. Then nothing."* (B11).

"*We applied for TERS but are still waiting for funding.*" (B12)

"*Many of the staff didn't even get UIF or only one payment.*" (B1)

One of the most controversial issues, particularly among white-owned SMMEs was that they did not qualify for funding because they are not 51% black-owned: "*It would've been helpful if the government helped financially - even loans. But BEE restricts us*" (B14). With the size of these businesses, the majority would struggle to get BEE accreditation. "*I'm foreign and white so I don't qualify for any help*" (B4). "*In a situation like this, everyone needs help*" (B11). Many of the concerns noted among those who had similar complaints, is that they employ large staffs, the vast majority of whom are Black and from the local Bushbuckridge community: "*80% of our staff is Black and from the local community*" (B14). One suggested proposal to deal with issues surrounding transformation, was made by respondent B13, where she went into quite significant detail on the possibility of creating a mentorship programme. It was stated that government should try and instate some kind of special funding for operators if they are willing to "buy in" to a mentorship program, where they agree to connect with small Black entrepreneurs and "*show them the ranks"* (B13). Arguably, this would be a much more beneficial way of ensuring transformation in the industry without the requirements of BEE accreditation, which is very difficult for these small businesses, many of whom are already running on skeleton staff. "*The government needs to engage with people who are willing to give opportunities to young guides to get practical experience with established companies. Most of the businesses are run by people who are aging out, some are 60,70, 80 years old. The knowledge needs to be passed down. We want to leave a legacy. We just need the support for this*" (B13).

14.2.5 Business Prospects

In light of the current situation, and a discussion about potential support and interventions, respondents were asked what they felt were their prospects for the next 12 months without any support or interventions. A safari tour respondent said that they had already decided to close their business "*We are closing down. We are emigrating*," (B11) while a lodge owner already had put the property on the market and another safari tour operator stated that they were on the verge of shutting down (B15). Out of the 20 businesses, only four (B5, B10, B12 and B19), confidently, feel that they will survive the year without support, albeit all said that it is dependent on no new restrictions being put in place and that despite survival, there would likely be major cuts, particularly in staff. These are predominantly large established businesses (in the cases of B10 and B19) or those who are inputting income from other sources (namely B12, the owner of which owns a chicken farm). "*Alternative income has sustained us*"(B12). The final respondent runs a wildlife interaction which was already primarily dependent on domestic tourists already (B5). Of note is that the only other operator which has a majority domestic clientele is still concerned about her business because of the nature of the changes in tourism demand (i.e. a lack of events in the area) and difficulties in taking clients on cross-border trips. Some respondents stated they are not sure, with comments such as "*We're hanging in there*" (B7) or "*Just try to do it day by day*" (B2). The remaining respondents stated that without intervention or a significant uptick in visitors to the area (which several noted is dependent on at least some return of the international market) they would not survive.

"*Four more months, then we're closed*." (B6)

"*Chances of survival are low. Trying to do anything to keep afloat*." (B8)

"*Closing business…Very little hope in the future.*" (B11)

"We won't have a business…I haven't had remuneration in 13 months. That is the state of where people are." (B13)

For the luxury lodges, in particular, the pool of possible clients is small: "*The South African market for luxury is already small and it will get smaller if things continue as they are going*" (B19). Another said "*From August to December, we were full every weekend. A bit during the week from government. It covered costs but we didn't make a profit. Nothing extra*" (B14). Some gave exact timelines for when they expect their business to close without support, most of which fell between the next four and 10 months, meaning they do not foresee survival to the next December/January holiday season. "*We are in recovery mode. At the end of the day, charging 33% of our normal rates will not let us continue. We were hoping to survive for the next 6-12 months. Now it's looking like it will take 2-3 years to get back to where we were*" (B20). Many enterprises were very pessimistic offering statements such as "*If you can do something else, do it! Tourism isn't coming back in the near future*" (B11).

Overall, there was a strong body of opinion from many of the respondents about the necessity of the survival of tourism in the area. Safari tourism and that linked to Kruger National Park is considered some of the most iconic in the country. As one respondent stated: "*Without support more and more places will close down. Game Reserves can't fail. They are part of the South African psyche*" (B10). It was argued that by emphasizing the importance of tourism in the South African economy: "*I know this is a pandemic,* *it's serious, but we need to save what we can. Use the money towards businesses that will save South Africa. Tourism is one of them*" (B10).

14.3 Findings: Overstrand Cluster

The Overstrand cluster is extremely dependent on tourism. The area encompasses a range of tourism niches. First, coastal and marine tourism, specifically whale watching, nature cruises, scuba diving, kayaking and beach tourism. Second is adventure tourism which intersects with some coastal tourism activities but also includes zip lining canopy tours, hiking and rock climbing, quad biking, hang gliding and kite surfing. The scenically beautiful and hilly interior is the locale of some of South Africa's premier wineries such as around Elgin, Bot River, the Hemel-en-Aarde Valley and Stanford. These wineries and local touristic towns are home to many premier restaurants and mainly organically grown produce (olives, cheese, cider, apples, pears) which has resulted in the Overstrand being awarded the status of Africa's first UNESCO creative city of gastronomy. A wide range of accommodation offerings attract both international and local visitors. This section of the report unpacks the impacts of the COVID-19 pandemic on their businesses, changes in demand and tourism businesses supply-side adaptation or response strategies. This includes analysis through the various opportunities and challenges that they have been confronted with and whether this has resulted in new products and offerings and further co-operation with the wider tourism industry or reducing part of their business and downsizing. A further section considers how government regulations have impacted the tourism businesses and whether local and national government could assist or intervene during this time of drastic shrinkage in the tourism economy. Finally, the prospects for tourism businesses during the next year are investigated. This report draws heavily on the words and feelings on the interviewees and every effort has been made to make audible the voices of the area's tourism entrepreneurs and business managers.

14.3.1 Overview of businesses and impacts of COVID-19

A broad range of tourism enterprises was interviewed in order to cast the net wide and gain a variety of inputs. The mix of interviews encompassed the organiser of a country market, a number of adventure tourism operators (2), wine estates (3), a craft brewery (1), tours and transfers (1), restaurants (2) and the full gamut of accommodation providers from high end five-star accommodation to four and three-star guest houses, bed and breakfasts, farm stays and backpackers (10). Fifteen of the tourism enterprises who were interviewed had been in business for ten years or more. As long standing businesses they are embedded into not only the tourism economy but the broader local economy due to established supply chains. Four other tourism businesses had been in operation for between six to nine years with only one business operating for less than five years. Seven of the tourism businesses employed thirty or more people. One award winning five-star lodge employs 100 staff members, a country market employs 85 and an adventure tourism establishment as well as the three wineries each employ between 30 and 40 staff. The rest of the businesses which comprise an adventure tourism outlet, tour operator, craft brewery and a variety of accommodation providers each employ between two and nine people. It should be noted, however, that a number of these businesses employed more staff prior to the onset of COVID-19 (see Table 7).

Table 7: The Overstrand cluster of interviewed entrepreneurs

Identifier	Type of Business	Years in Operation	Number of Employees
O1	Country Market	2,5	85
O2	Zip Lining (canopy tours)	6	35
O3	Diving and Boat Cruises	9	5 and 2 part time (now 1 part time)
O4	Wine Estate	10	40
O5	Wine Estate	20	32
O6	Wine Estate	40	30
O7	Craft Brewery	9	2 and 8 part time
O8	Tours and Transfers	10	2 (was 5)
O9	Restaurant	17	5
O10	Restaurant	11	12
O11	Five star eco-lodge	24	100
O12	Four star guest house	17	5
O13	Four star guest house	16	9 (was 15)
O14	Three star guest house	21	3
O15	Self-catering house	12	2
O16	Self-catering apartments	10	4
O17	Bed and breakfast	8	2
O18	Bed and breakfast	10	3
O19	Farm cottages	17	2
O20	Backpackers	21	2 (was 5)

Source: Authors

The COVID-19 pandemic has affected all of the tourism establishments in Overstrand and its surrounds, negatively. Words and phrases used to describe the impact that this has had on their business include:

"devastating" "*less of everything*", "*survival is the bottom line*", "*eye opening*", "*unless BEE compliant can't survive*", "*change*", "*unpredictable*", "*it's been crippling*", "*totally decimated*", "*destroyed the South African market*", "*disastrous for the most part of 2020*", "*horrific*", and "*quite painful but not devastating*".

A major part of the reason for the highly negative impacts relates to the strong orientation of tourism businesses in the research area towards international tourism. In the Overstrand cluster this is especially the case for the hospitality and accommodation sectors. For other tourism products, such as the country market, the craft brewery, zip lining (canopy tours) and a few wineries, there was evidence of a majority domestic market or even split between international and domestic tourists. The country market attracted mainly domestic tourists from Overstrand, Elgin and most especially further afield from Cape Town. A weekend steam train that ran between the V and A Waterfront and the market was an additional attraction for local families as well as overseas visitors. This attraction drew only around 15% international visitors with the remaining 85% being Capetonians on day trips; residents of Elgin, Bot River, Hermanus and surrounds supplemented by upcountry domestic tourists during the school holidays and Christmas period. The craft brewery was also 80% domestic and 20% international. They appeal to locals who live in the area or week-end trippers from Cape Town. International visitors are mainly seasonal, immediately before or after the Christmas holidays. They are, however, a small establishment reliant on word of mouth. The zip lining canopy tours had an even split between domestic and international tourists. The wineries also experienced a fifty-fifty market between domestic and international tourists with internationals being seasonal and predominant during October to April in pre-pandemic times. The farm cottages were the only accommodation type where domestic tourists accounted for half of their visitors unlike the other accommodation types where the international tourists dominated. The majority of accommodation types which comprise a five-star eco-lodge, guest lodges, self-catering, bed and breakfasts and backpackers, experienced between 60% (only one guest house) to 80 to 90% (the norm) international tourists. The adventure diving and cruise boat establishment was the tourism product most reliant on foreign tourists with 95% of their clients being international and a mere 4% domestic.

14.3.2 Supply-side response to changes in demand

All of the interviewees have experienced a change in demand since the onset of COVID-19. In a number of cases there is a hope that demand for their tourism products will increase from domestic tourists. In many cases, however, this has not been translated into actuality largely as a consequence of the wider impacts of COVID-19 on the South African economy and correspondingly of reduced discretionary expenditure. Of significance also is that certain respondents identified "the fear" factor of travel as another factor in accounting for laggard domestic demand. These issues are highlighted in interview responses as follows:

Don't really see many changes as people don't have money. We have dropped rates to encourage domestic tourists - R3 800 for sea facing room is now R2 600/2 200. Hoping to see some sort of pick up in March and Easter (O13).

Less demand as most domestic guests are affected financially, so weekends away are now considered a luxury. And the threat of COVID making potential domestic guests wary of communal facilities and interacting with strangers. (O20)

A lot of people are not going out as they are in fear (O7).

The South African economy has shrunk and the economic onslaught continues. Domestic tourists have less disposable income to spend on leisure and this impacts demand (O11).

Possibly more local tourists looking to escape the city but this is not showing yet (O19)

Some businesses recorded a marginal increase in domestic tourists which has assisted in keeping their businesses open at a survival level. This said, the point is clear that in this part of South Africa the spending from domestic tourism cannot replace the reliance upon higher-spending international tourism.

We have increased percentage of domestic visitors over the past few years and expect more local visitors going forward (O12).

Marginal change from domestic tourism. National (from different provinces) seems to have dropped . Business down more than 50%. Not seen a big uptick in domestic demand. Not able or willing to devalue our product. Margins are already narrow as the beach ban dissuaded upcountry people from visiting or staying longer (O2)

Yes, we expect more domestic visitors as South Africans can't travel abroad (O13)

We were pleasantly surprised. Domestic tourism rapidly increased mainly from December but throughout last year. Local tourism kept the business afloat although no replacement for the international tourists. South Africans friendly, supportive and eager to tip, sometimes 100% tip after a dive trip R1000 (O3).

The tourism enterprises have used a number of responses to address the changing demand as a result of no international tourists and cautious domestic tourists many of whom are scared of catching the virus or under financial strain. All establishments have visibly implemented full legislated safety protocols. Another common denominator across all tourism categories is a dramatic increase in their online/social media presence and have sought innovative ways to market themselves to the domestic market. The energetic and innovative responses of the organizer of the country market are worthy of note.

Before Christmas through the local tourism committees it was clear that Cape Town and the Overberg were attracting large number of Gauteng tourists. I took out simultaneous radio adverts in Johannesburg and Cape Town. The ads played on Magic 828 for Cape Town and on 702 for Johannesburg. The message was reinforced as Joburgers heard the same message when they travelled to the Cape on holiday. Astounding results with over 30% of cars in the carpark with GP plates. More than they have ever had since opening two and a half years ago. Radio stations also losing revenue so for a few 1000 Rand extra they incentivised us to spend a bit more and the ad reach grew by 150 000. In these times it is important to be pro-active, innovative and get out there. To attract the people from markets that have closed like Hout Bay Route 44, Lourensford etc I was also on local radio stations such as Radio Helderberg and WhaleCoast FM to attract Hermanus visitors (O1).

Further, in common with trends observed in other parts of South Africa, price-cutting was a supply-side response to the crisis for nearly all of the tourism enterprises. Businesses had to lower or freeze their rates to entice domestic tourists in order to ensure that their offerings were perceived as desirable and affordable. These specials and rate cuts have been advertised extensively on social media and through online tourist booking platforms. The voices of the accommodation establishment operators illustrate these trends.

We are currently running a digital campaign - Summer Sun special which will run through to the end of April and we ran a Spring Splendour special (O11).

During November level 2 and 3 had a special on the eco tours but to compensate have not increased prices to keep business afloat (O3).

We can't vary our product offerings, but we have trimmed some of the added extras that we used to offer in an effort to reduce costs. We've also offered specials aimed at local families (O2).

Price reductions being offered via booking sites (O20).

Specials for mid-week stays, stay for 3 and pay for 2. Contactless check in. Sanitizing deeply in between stays (O19).

Responded by decreasing rates. More focused on the local market. Always had a 'local is lekkker' rate drop of 20% now it is 30% and previously was mainly applied in the low seasonwhen internationals were not around. There is business over the week-ends but during the week very quiet with discounts up to 45% and still many days there are no guests. Hopeful that it will pick up (O13)

Another strategy that tourism enterprises used to adjust their existing offerings towards domestic tourists was to introduce more diversified and often family-friendly products which they then advertised to the local market. For the Overstrand cluster alongside the various lockdowns the banning of alcohol was particularly damaging to the tourism and hospitality sectors which has a substantial element of food and wine tourism. In response those businesses engaged in alcohol production developed a range of more family friendly activities to encourage visitors to their establishments. Examples are that wineries allowed pets and introduced children’s activities, a craft brewery sold more novel soft drinks and other wineries conducted on line tastings.

As a wine estate we have diversified our product offerings to be more family friendly and less wine - oriented. Welcomed pets on leads. Introduced or ramped up more family focused activities such as – children’s waterpark, jungle gym, picnics, boat rides. Putt Putt with a family friendly restaurant attached (O4).

We had to find things to sell that we didn't normally sell. Different to coke such as rock shandy. There is a market for soft drinks due to regulations on drinking and driving (O7).

People are not keen to go out and taste wines so they do online tastings with trade and customers and groups of wine enthusiasts This generally has worked well - chatting to the wine maker especially for international buyers so they get a feel for the farm. Sometimes winemaker chats from the vineyards which gives people the feeling that they are there - will carry this on with internationals after COVID. Using WhatsApp and Zoom in the vineyard and for tastings with foreign buyers has been a positive spin off from the pandemic (O5)

Overall, the responses from businesses emphasized in the majority of cases strategies of self-reliance with accompanying shifts in revenue-generation and reduction in work-hours . For other businesses – most notably the adventure tour operations massively reliant on international travellers, the response can be characterised as of vigilance as their situations preclude them from controlling their destiny and thus the options are either to undertake preparations for a new post-pandemic regime or to become *inoperative,* discontinue operations, or standby for new protocols permitting a reopening of business.

14.3.3 Supply-side challenges and opportunities

The major challenge for all business owners was to keep the business open and to survive. With minimal support from government these businesses necessarily had to be self-reliant in their responses and address a range of challenges. In particular during the December and January holiday period (2020-2021) the alcohol and beach ban put additional strain on already struggling tourism businesses in the Overstrand and environs to avoid closure of their operations.

Challenge is more feet through the door and the uncertain future which is unpleasant. Trying to keep tenants, giving rent reductions and anything to keep up some sort of cash flow. It is a nightmare. With him and the tenants there is a feeling that we are all in this together and all trying to do whatever it takes to survive. (O1).

The major challenge is keeping the business open. Keeping afloat is difficult and I contemplate closing the business three times a day (O8).

Staffing was an important issue for most cluster respondents. Some businesses could not afford to keep all their staff and reluctantly had to reduce staff numbers. Other cost reducing measures that were implemented included mothballing part of their accommodation establishment, turning off geysers, DSTV and fridges. Many others in an effort not to retrench cut all staff salaries by half and in some cases cut their hours by half as well. These points are elaborated by accommodation respondents as follows:

Reduction in staff, no upgrades to the rooms and very basic services so that you don't have too many costs (O12).

The challenge is that the business imperative is simply survival. There is no room for the introduction of innovative new products. The business survival is critical to the staff and also the community work the business drives through its Foundation (O11).

We've also made a monumental effort to reduce the monthly overheads of running the business, such as cancelling our security contract, reducing insurance to minimums, turning off geysers and fridges in our adjacent building when not in use. And sadly, reducing wages – we previously employed four cleaning staff, one front of house, a gardener/handyman and two or three international volunteers, now we have one cleaner, one front of house (O20).

For the crippled adventure tourism sector, not being able to afford to keep critical trained staff was of major concern. The operator of a major ziplining operation articulated the following:

Retaining highly trained staff is our main concern. We've started reducing our operating days, but we don't want to close, because that produces a negative public image, and there is a lag in start-up again. But we can't continue to make a drastic loss through the coming low season. Most staff been with us since the beginning. Not feasible to re-train people they are all local community members (from Grabouw) (O2).

A further challenge to the accommodation and hospitality sectors in particular given the dearth of international tourists and slump in domestic demand was the necessary flexibility to deal with late bookings and cancellations.

Challenges are the last minute bookings and cancellations. The major challenge is to keep up standards even though rates are lower and to keep afloat until the end of the pandemic.

Major challenge is that lower prices affect our bottom line. Most of the bookings today are coming through the platform "Lekker Slaap" not so much Bookings.com or Trip Advisor sites. We are in the self-catering niche which is surviving better than other types of accommodation. Fairly quiet during the week but full most week-ends. Last week no bookings by Tuesday but by Friday were full. This is the last minute new *normal. No pre-planning anymore we have to be on the ball all of the time. Apartments need to be ready to go all of the time. Internationals would book well in advance so more notice period* (O16).

Despite the many negative consequences of the COVID-19 pandemic and the various lockdown regulations and the threat to all of the businesses livelihoods, several interviewees saw silver linings of opportunity. The following interviewee responses speak loudly to the resilience of local tourism businesses and their self-reliance in the context of the pandemic.

Always opportunities. This disaster has made us think out of the box (O1).

It is great that there is an enthusiasm for exploring what is on offer domestically. So the market that normally would travel overseas each year are happy to support a local tourism product. The lockdown restrictions have tempered this enthusiasm. Also taking this time to get the basics right. Usually tourism is driven and high paced so this slow down means there is time to engage extensively with their sustainability principles such as waste management and environmental management. We focus on doing better things that have no cost. It is also very important for management to keep staff motivated and involved as issues around mental health are important (O11).

The opportunity was to utilize technology better to keep in touch with visitors and clients and to stay close to people (O5).

Outdoor activities are big in the Cape. We plan to focus on this market by offering Mountain biking trails and hiking. Customers are looking for outdoor experiences so our space on the farm is a good opportunity to catch those looking for something to do while being able to be outdoors in the fresh air (O6).

Opportunities are maybe working with other businesses We are teaming up with 10 other Hermanus businesses and advertising in a Cape Town magazine that advertises widely - Windsor Hotel, Ficks Pool, art galleries etc. The main aim is to market Hermanus as if we can get visitors to visit the town then we all win so the first goal is to market the place and then specific offerings. Focus on local more and run more specials (O13).

All the interviewed tourism enterprises sought either to introduce new products or alternatively to adjust existing offerings in order increase their attractiveness to domestic tourists and thereby improve their enterprise bottom line. Going forward keeping prices affordable for domestic tourists and focusing on marketing and improved social media presence were strategies deployed by most of the tourism enterprises. In addition, some have modified or added to their existing offerings. Restaurants have in many cases simplified their menus but some have added frozen meals to their businesses. At two winery restaurants frozen meals can be purchased at the premises and one of the wineries went even further by instituting a delivery service to deliver meals as far as Cape Town. A major benefit of this enterprise diversification was that they were classed as ‘essential workers’ and thus were able to grow this part of the business during the first hard lockdown. Subsequent to the hard lockdown the business continued to grow such that they have had to employ more cooks (O6).

The frozen meals are new products from our restaurant. In the winery we are scaling back on the wines and focusing on styles within specific wine series and ranges. The winemaker has been experimenting and they have now gone back to storing white wines in clay pots. Their philosophy is to keep things fresh and different. They looked at their offerings and decided to pare down their wines and organize them differently (O5).

At the one surviving country market the strategy and business opportunities were explained as follows:

Focus on marketing. We do what we have to do. Revamping the shops and constantly improving the offering and adding new touches all the time. Repeat visitors need to see something new so it is important to stay fresh and relevant. Look at small innovations. After the popularity of Queens Gambit on Netflix we brought in 3 chess boards. People linger and play or fathers teach their children. People enjoy them and over the 3 months not one piece has gone missing and taken. It is 100% a mindset. It is easier to give up rather than fight -"the barbarians are at the gate" mentality. Some businesses have failed but mainly due to defeatist attitude, easier to throw it all in. Also we encourage the traders to try new offerings. One food seller always had some of his lamb left over. We chatted and he decided to make pies which can be frozen and taken away as well which added a new little side line to his business (O1).

For the owners of a backpacker lodge with the collapse of the international market the business had to pivot towards accommodating particular groups of short-term visitors.

We've directed more energy into adapting the business to cater to building contractors coming to the area, long term guests such as Telkom engineers, doctors on assignment at the local hospital and building contractors (O20).

Other different opportunities were explored and activated as tourism products by the sample's resilient entrepreneurs as self-reliance interventions for new opportunities. The different opportunity pathways are highlighted in the following responses.

One thing is that the Tourism Bodies in South Africa are closely knit. I acknowledge that they do not work closely enough together and can leverage off each other and market jointly as they are appealing to the same tourist. Zip lining, quad biking, shark cage diving etc similar market. Need to do more than just give each other referrals but create a platform and package things. Looking to put a poster together or video at Cape Town Airport international arrivals with names of each of their businesses (O2).

Used lockdown to launch a new website and to sharpen our social media and newsletter presence. Opened a deli on the farm to increase wine sales through this. Just completed our 10km Mountain Bike trail which we will launch in March. Plan to improve hiking trails. We focus on producing more fruit rather than grapes because of the alcohol bans (O6).

Looking to convert an old building to increase our accommodation to 3 cottages. Possibly the building of a yoga deck to accommodate retreats on the farm (O19)

No new offerings just new pricing and ability to keep a credit for 12 months instead of cancelling and freezing the rate No rate hikes until 2022 (O13).

Seven of the Overstrand cluster of tourism businesses had downsized their business to some extent. Restaurants by law can only seat a certain number of people due to social distancing legislation so are automatically smaller than in pre-COVID times unless they have managed to accommodate those diners in suitable outdoor locations. Several accommodation providers have also downsized by shutting up/ mothballing/decommissioning some of their rooms, outbuildings or in one case a whole lodge in order to save money on staff and overheads. Other businesses have cut down on their products or their services, however, they all recognize that closing is not an option. These are signals of vigilant entrepreneurs waiting for post-pandemic revival.

Only one of the two lodges are open. Villas open on an ad hoc basis (O11).

Downsizing. Started this prior to COVID. Owning less cars and just trying to stay afloat. Not at the point where I will say no to business. I have diversified into some non-tourism business (O8).

Reduced quantity of beer that we produce. Economizing as to how they purchase supplies. Have not reduced prices but continued as before. Not looking at any change. It is not the time (O7).

Yes. Fewer tours a week and cutting down on overheads. Can't afford to close as then more difficult to open up after long lag period (O2).

Sort of downsized as now they only run the main building with 11 rooms and outside buildings have turned off fridges, geysers and cancelled DSTV. Even though they have downsized still had to run 2 breakfast shifts to keep physical distancing rules (O13).

Despite the difficult trading conditions many of the cluster's tourism businesses are adamant that they are not willing to downsize or reduce their business despite the current hollowing out of the tourism industry as a whole in South Africa. The respective responses of the operator of the country market and one restauranter are revealing:

No! downsizing is the worst thing that you could do. Would like more business and more visitors but will not downsize. I went and visited other markets in Cape Town and many were closed or barely functioning apart from Oranjezicht. Others in Somerset West and Stellenbosch like Route 44 and Lourensford have closed down. I see that as opportunity and have used radio ads and social media to keep awareness of Elgin market high and encourage visitors (O1).

No we have stayed open 7 days a week despite many week days being extremely quiet (O10).

Finally, inter-enterprise cooperation with other local cluster businesses remains an essential business response. In total it was disclosed that 19 of the 20 interviewees co-operate with other businesses. This co-operation occurs variously in the form of joint marketing, information sharing or referrals. In addition to co-operating in order to assist other businesses many of them recognize that it is important to all come together to sell the destination first and encourage tourists to the area rather than merely focusing on one tourism business at a time as increased visitor's benefits all businesses in the area.

We co-operate within the group and do more joint marketing with a range of Hermanus businesses to encourage visitors to visit the town (O12)

We work in a tight community so there is information sharing and dialogue across the industry and community (O11)

Absolutely. The dive charters supports other tour packages and they get permission. So there is a reciprocity with other adventure tourism businesses as well as waiters at restaurants – if they sell dives waiters get commission. Word of Mouth is incredibly powerful. All adventure tourism need to do well to attract tourism to Hermanus as we need lots of tourism businesses otherwise nothing to attract tourists (O3)

We co-operate within the group and do more joint marketing with a range of Hermanus businesses to encourage visitors to visit the town (O15).

Always referred to other accommodation suppliers and recommended places to eat and visit. Need more formal linkages through joint advertising for Hermanus as a whole and individual businesses as well (O13).

14.3.4. The role of government

Interviewees were asked a number of questions relating to government. First, if government regulations during the pandemic affected their business positively or negatively. Second, what local government and national government could do to assist and which of these interventions would assist in responding to the challenges of supplying the domestic tourist market in the short term (next 12 months).

In terms of the impact of government regulations it should be noted that some of the interviews took place during the alcohol and beach ban which was in place from December into February and consequently most of those interviewees focused on those restrictions which was a further challenge to their business during these already business-stressed times. Most of the negative comments as they relate to government regulations focused on the alcohol and beach bans as well as the curfew especially for the restaurant businesses which particularly impacted those in the night time tourism economy. The interview responses highlighted contradictions in alcohol policy as well as the devastation caused to coastal tourism businesses by the December beach ban. The views of several respondents below reveal the debilitating consequences of government regulations.

Negative effects and 100% of that is due to the liquor restrictions. The clientele who visit the market are responsible. 320 000 people through these doors and only 2 drunkards Are the government rules penalizing the responsible for the tiny proportion of irresponsible? Not one car crash as the traffic police are always around and would have notified of anything. Curfew has impacted the dinner trade at night, barely worth-while and only just breaking even but will continue as it is a social outing for the locals and can't afford to lose tenants who also need all the business that they can get. There is also nobody to replace tenants as in normal times as nobody has any start-up capital or funds to start another business (O1).

When the new regulations came into force on 27 December the whole area 'packed up and left". No beaches, the curfew and alcohol ban destroyed the idea of a holiday and they as well as surrounding tourism businesses had many cancellations (O11).

Affected negatively due to loss of business. On the 27 December we had total cancellations of diving and cruises. Could not operate sunset cruises due to curfew and not allowed to sell liquor. We make 40% of annual revenue during the December/January period so this was devastating. The December months subsidize the 3month lull in the winter months (June to August) (O3).

The curfew had a negative effect on planned events - New Years' Eve party, outdoor cinema evenings, afternoon music events. The drinks ban put visitors off visiting the restaurant. Very busy with domestic tourists visiting up until 27 December then many visitors left the Hermanus area especially with the beaches being closed as well (O4).

Government regulations affected us negatively. We operate out in the open, in a nature reserve Having Cape Nature as landlords, we were not allowed to open particularly because ziplining was not specifically allowed (O2).

Very negatively. Understandably, the closure of our international borders to stop the spread but interestingly the closure of beaches and the alcohol ban of late December 2020 was more of a blow as this was our peak season and an opportunity to make a little money. We had so many late cancellations that the peak dates over New Year saw empty rooms, where previous years we'd had waiting lists - traditionally the Christmas/New Year dates are almost entirely domestic tourism (O20).

Only negative impacts. When beach ban came in we had a lot of cancellations. We are across the road from the sea. Earlier in December it was not looking too bad and we had visitors that were booking for longer than usual - a week or longer as these were people who normally went overseas so had money to spend on a local holiday. We were full for part of December but the beach ban meant cancellations and lower occupancy (O13).

In addition to the lockdown regulations which disincentivized travellers, the government announcements to stay home or within bubbles accentuated a fear of travel and of mixing with others which further affected tourism businesses negatively. As was expressed by a local tour operator: "*COVID has created a lot of uncertainty and people more cautious to travel freely"* (O8). It should be noted that in one case the business did not see the government regulations as only negative. This winery was able to increase overseas wine sales which subsidized the shrinking of their restaurant and tasting room business. It was also seen as a time to train staff and increase their online presence. The enterprise response of this wine estate operation is a further indicator of resilience in the cluster of operational tourism enterprises.

It was very difficult at first but overall the positives outweigh the negatives. Early April 2020 the owner met with all employees and set targets which they had to meet otherwise there would be cuts. The following month the hashtag #savesouthafrican wine went viral. Our larger overseas markets continued to import our wines. Consequently, not one staff member was lost which means that negative knock ons to the broader community was low. The private online market was also amazing. Three years ago their online shop made around R60 000 and last year the increase was exponential. Buyers have shifted en masse to online. Initially, logistics companies were inundated and there were early problems with couriers. They did adapt. For us the major negative was lower numbers in the restaurant due to the restrictions. During lockdown staff who deal with the public were also demotivated as there were fewer people around. They did not lose their jobs so not such a big negative. The lockdown did free up some time which normally they would not have so training was ramped up which benefited a number of staff members (O5).

The major positive government policy intervention which assisted a number of the cluster's tourism establishments was the Temporary Employer/Employee Relief Scheme (TERS) payments to staff who qualified as in many cases that minimized retrenchments and augmented the salaries of those workers who are on the bottom rung of the tourism employment ladder such as housekeepers, cleaners and gardeners.

Most interviewees hoped that local government might assist them by reducing business rates during the difficult times, albeit most acknowledged that this was unlikely to happen. For example the operator of the country market stated that it "*Would be great if they could reduce the rates and taxes but that will not happen. Elgin and Grabouw council has no marketing budget so they cannot even help with awareness and encourage visitors to the town"* (O1). Another major theme that flowed through the interviews was for the local government to be more pro-active in advertising the area.

To stop promoting Hermanus as a 'whale only" destination as that season is only for 5 months but Hermanus has a range of products - diving, hiking, art galleries, wine. As Hermanus mainly promotes whales it could get more tourists by advertising itself more widely than whales. Need to diversify, particularly for ocean tourism (O3).

Bot River is not really on the wine map so local government could increase marketing of smaller wine regions. We have had to make ourselves a destination but Bot River needs more work. Each farm is fairly insular need to think how to benefit all (O6).

Other respondents recognized that their local government was struggling to provide their basic mandate and did not have the finances to market the tourism products in their area. In at least one case – that of a large ecolodge – enterprises pro-actively went out of their way to assist their local municipality to feed people who had lost jobs and could not fend for themselves.

Have had a close working relationship with local government for many years. They are trying their best but not able to cope. Most people in the area employed in tourism as fishing industry no longer viable. Municipality helped with the feeding scheme early on but could not afford to sustain it. They struggle to do the basics. We have stepped in to help and all of the lodge staff help to prepare or distribute food to the local people who are struggling and we have provided over 300 000 meals. We feed 650 people per day and try to focus on the children. We also provide a two-week survival kit for those who have to self-isolate due to COVID-19 (O11).

The support needs that the cluster of tourism enterprises required from national government are varied and included the request to extend TERS, improve public transport and the culture of travel overall, to enhance the marketing and promotion of South Africa. Further, in the case of the wine tourism sector there was a request for more nuanced appreciation by government of alcohol producers. This was expressed in the statement in the case of wineries for government to understand that they are "*wine farms and not liquor outlets*" (O4). A key finding is that government actions relating to the alcohol bans and beach closures have resulted clearly in reduced levels of trust and a disconnect between the tourism industry entrepreneurs and government. Inadequate communication and sharing of information with the private sector were flagged as key issues.

.From the operator of the surviving country market the perspective was as follows:

Generally, we ignore government. We understood the need for a curfew and social distancing but banning alcohol made no sense. We don't understand how or why these decisions are made and have lost faith with government. They do not share information which is then passed from province downwards and decisions are arbitrary and makes people believe that there is no rational basis for decision in the first place……. National government should improve public transport so that staff and visitors could get around. Nothing has really come through from national government encouraging domestic travel or a culture of travel (O1).

The core support interventions as expressed by respondents in the Overstrand cluster are evidenced from the following responses:

National government could support tourism staff and not leave it all to the owners. TERS at the same level as before would be great. (O11).

We understand the need for tourism businesses to be run by all South Africans and we are all passionate ambassadors for South Africa. It seems that other African countries tourism industries have not been as damaged as South Africa. Kenya is doing okay and they have made it clear that they are open for business. A few months ago they flew in American agents - they are proactive and seeing results. We are becoming a pariah (O11).

National Government could encourage a culture of travel. Sell South Africa better to all South Africans – advertise and enhance what this country has to offer (O8).

Important short-term interventions that were put forward by the tourism enterprises in many cases overlapped with what many had said with regard to support from national government. Again, improved marketing of South Africa and its various touristic regions was a recurring theme. This is illustrated in the view expressed by a local tour operator: "*The most important intervention would be to sell and promote South Africa to local tourists. Let places create good experiences so that visitors return"* (O8). Overall, the need to open up the beaches and unban alcohol was echoed by many who were interviewed during the lockdown period. In addition, more education of the general populous explaining that they are safe if safety protocols are followed by tourism businesses was also a plea from a number of interviewees.

Intervention that would assist is for people to be educated more about the pandemic. There is such a fear of the unknown that people are scared to go out. Tourism spaces have prepared and introduced safety protocols and if people wear masks and sanitize they should go out and enjoy themselves sensibly. Equip people with knowledge but encourage them to travel (O5)

14.3.5 Business prospects

All of the cluster interviewees were optimistic that they would still be operational by 2022. This said, whilst none of them forecast permanent closure a few did suggest that they would drastically cut back or close down for part of the winter months. The winter period is always a downturn business period when traditionally there is more reliance on the domestic market; in 2020, however, these businesses did not enjoy the financial boost from a healthy Christmas season to tide them over the quieter times. Some of them were resolute others were more negative albeit remaining upbeat despite the current COVID environment.

The rest of this year will be a slow uptick which is a long and slow process. We are here for the long-haul (O1)

No matter how many or few guests be welcoming and do the hospitality job to the best of your ability. It is a head-game to keep motivated. We need each other there is still great value in getting up and going to work and meeting colleagues. We are looking to survive but not sure what shape or form we will be in 12 months' time. It is purely survival at the moment and we are all in the same boat with other tourism enterprises – restaurants b and bs etc (O11).

Stay open. Be innovative and hope that lifting of alcohol ban and beach ban and extended curfew will encourage more visitors (O4).

In 12 months' time probably in the same position. Hoping that I will still be afloat. That is all no further expectations (O8).

Fortunately, we own the buildings we operate from and have reduced staff and overheads to the point where we hope that although not profitable, the business will be able to at least make a reasonable *contribution to its overheads. We the owners, are contributing to the running costs of the business from our savings and a cashed in pension policy. If we're still here by early 2022, when we hope to see some recovery in tourism, we'll be broke and nervous. We have considered closing the business and selling the buildings - but this is also not a great time for that option either* (O20).

We will continue to focus on the local market and keep a strict eye on expenses. After 6 months we will need to look at staffing again. We did not retrench but not sure how we can keep going with current staff levels if no government support (O12).

Once again these statements attest to the self-reliant character of businesses in the study area and vigilance in terms of seeking to prepare for opportunities in a post-pandemic environment. Finally, it was highlighted by one interviewee that in the current negative policy environment that faces tourism businesses in South Africa that "*tourism operators are going offshore to Mauritius or Europe but keeping operations in South Africa*". (O2) The explanation was given that this move was more tax effective and what was driving this move was uncertainties about directions of national tourism policy. The interviewee added "*We are looking at this option as well*" (O2).

15. Recommendations

A number of policy recommendations about the tourism sector's demand and supply and for meeting the needs and demands of future tourists emerge as conclusions from this study. These are provided separately from the results of the demand and supply-side analyses. Taken together the recommendations from the demand and supply-side investigations point to a number of opportunities that to shape the tourism sector's supply and demand in order to meet the needs and demands of (mainly) domestic tourists in the COVID-19 environment.

15.1 Recommendations from the Demand-Side Analysis

Several important shifts were identified in the research concerning the tourist psyche and consumer travel habits across the international experience. The changes are driven by issues of safety, health and hygiene which are remoulding consumer demand globally and without doubt are also in play in the context of South Africa.

Eight specific recommendations can be offered which point to opportunities for interventions to shape tourism sector demand:

1. As it is inevitable that the importance of automobilities will increase in South Africa **it is recommended that the Department of Tourism recognise the potential growth of drive tourism and initiate a set of policy interventions to support a window of opportunity that exists currently for supporting this particular form of domestic tourism.** Key initiatives would include

revisiting tourism route planning, enhancing signage, improving local governments awareness of its importance, and working with the Department of Transport on improving road infrastructure and regarding all measures around road safety and road accident prevention.

2. It is evident that opportunities exist for addressing the uneven geographical spread of tourism through domestic drive tourism as tourists in the COVID environment seek out less crowded places. Therefore, **it is recommended that the Department of Tourism improve the awareness of local governments in rural and remote areas – most especially those with tourism products around nature tourism – of a vital window of opportunity to market those attractions around 'natural open space', 'tranquillity' and 'seclusion' to potential domestic tourists.** Discovering and recommending tourist routes based on untact such as drive routes, walking or bicycling trips is recommended for all visitors. In addition, following recommendations that have been made in other countries consideration should be given that local governments implement a "safety tourist destination" certification system.

3. The inevitable expansion of tourism in pristine environments such as South Africa's national parks and nature reserves will result in particular challenges for protected areas. In this regard **it is recommended that the Department of Tourism launch a monitoring study of the impacts of potential expansion of domestic tourism flows into protected areas especially in terms of ensuring their long-term sustainability as spaces for improving physical and emotional wellness and mental health.** In addition, such an investigation must consider that the major beneficiaries of enhanced health and welfare inevitably will accrue to society's elites, more affluent groups and the middle classes. Ensuring that such benefits also filter down to South Africa's lower income and disadvantaged communities will be an important future policy challenge for the Department of Tourism. This point is further reinforced by significant research findings on travel intentions of domestic tourists in Africa which point to persistent challenges of affordability and willingness to pay for most tourism products by the economically challenged domestic consumer market (cf. Woyo, 2021).
4. As the demand for visits to national parks, green spaces and 'tourism in nature' will increase because of physiological and psychological benefits and improvement of mental health real opportunities exist for the expansion of commercial nature tourism as a provider of nature therapies. **It is recommended that the Department of Tourism launch a research investigation into the experiential components and commercial design for different**

market segments of such nature forms of tourism. The starting point for such an investigation can be existing Australian research and debates (Buckley, 2020; Buckley and Westaway, 2020).

5. For city tourism the potential shifts in the travel behaviour of visitors offers opportunities to change the intra-city spatial distribution from major attractions to less visited areas. Such a development could be positive as it provides areas with new options for value creation and even allow cities to develop a more diversified portfolio of tourism products which may make them more resilient as well as provide their residents with a greater range of local leisure opportunities and experiences. It is recommended therefore **the Department of Tourism launch an investigation into opportunities to develop new products such as creative tourism and off the beaten track tours in order to support the visitor economy of cities as well as increase the geographic spread of tourism impacts in South Africa's major cities.**
6. In relation to popular tourism attractions – whether in cities or national parks – it is recommended that **the Department of Tourism support the installation of technologies flexible tourism demand management** for gathering real-time data in order to enact control measures to minimize congestion and to maximise social distancing.
7. As 'aquamobilities' in the form of cruise tourism appear unlikely to regain their pre-COVID-19 popularity **it is recommended that the Department of Tourism liaise with other government departments involved in Operation Phakisa and the Oceans Economy in order to urge the abandonment of plans for building new cruise ship terminals**. In addition, it is recommended the Department of Tourism revisit its Coastal and Marine Tourism Strategy which feeds into planning frameworks around the Oceans Economy.
8. For re-igniting the future flows of international tourism **with a view to promoting a movement towards 'untact tourism' in South Africa it is recommended that the Department of Tourism expand the awareness of tourism businesses and of local governments of the potential and importance of best practices relating to safety and cleanliness, the growth of the contactless economy, and foster an ecosystem of tourism services centred around the concept of untact (**Jeon and Yang, 2021)**.** In addition, the Department of Tourism should initiate a process to identify a list of safe, nature-friendly 'untact' tourism attractions in South Africa for the specific purpose of international tourism marketing for particularly Asian markets.

15.2 Recommendations From the Supply-Side Analysis

The supply-side findings from the 60 interviews with tourism product owners at Bela-Bela, Bushbuckridge and Overstrand point to a number of recommendations for potentially shaping the sector's supply and demand in order to meet the needs and demands of the domestic tourist market. In total five core recommendations are put forward.

1. The evidence from the three case studies confirms the fragile financial state of tourism enterprises which is the result of COVID impacts and exacerbated by government lockdown regulations, such as alcohol bans and beach/swimming pool closures. Although government financial assistance to support enterprises is not expected in relation to current direction of policies a strong case exists for extending government financial assistance to workers in tourism and hospitality establishments. The supply-side findings point to **the recommendation that the Department of Tourism make the case for an extension of TERS for workers in the debilitated tourism and hospitality sector.**
2. Another common theme across the evidence from all the supply-side research is that opportunities for the domestic tourism market are eroded by the existence of a "fear of travel" amongst a segment of the South African population. This fear of travel exists despite the legislated requirements for and commitment of the overwhelming majority of local tourism and hospitality establishments to all COVID-19 protocols. The studies disclose evidence of what is a South African form of untact tourism. **It is recommended that the Department of Tourism launch an immediate and energetic marketing campaign (to save the Easter season) with the messaging about the safety of tourism establishments and commitments to high standards of hygiene and personal safety**.
3. The research confirms the significance of drive tourism for South African domestic travellers but that in certain parts of the country major shortcomings exist in respect of quality of road infrastructure, signage and maintenance of roads. In addition to exploring opportunities that exist with the growth of drive tourism for remoter and peripheral areas **it is recommended that the Department of Tourism ensure that as part of the President's commitment to new infrastructure projects that road infrastructural projects linked to existing tourism nodes are prioritised.**
4. The research disclosed the immediate threat of the potential loss of tourism product base and of tourism skills in many parts of South Africa. As the impending closure of these tourism businesses, most especially in tourism-dependent areas, will impact local employment and

livelihoods **it is recommended that the Department of Tourism launch an investigation into the impacts of tourism establishment closures on local communities with the need for the appropriate planning of exit strategies from tourism and correspondingly training/reskilling of communities for non-tourism livelihoods.**

5. Finally, the research revealed evidence of a disconnect between the majority of tourism product owners and government as a whole and with the Department of Tourism in part because of lack of clear communication from government with the sector. The consequence is a lack of trust which is reinforced by a perceived lack of personal engagement with the sector. In moving forward with partnerships with the private sector **it is recommended that the Department of Tourism improve its communications and institute closer engagements and sharing of information with established tourism businesses in order to rebuild trust in the sector as a whole.**

16.Limitations

One limitation of the study was the actual size of the interview sample (60 enterprises) which was a result of the short time frame for this investigation and the challenges of pursuing interview research during the pandemic. The sample was deliberately constructed with the view to obtain as wide a spectrum of views as possible from different types of tourism product owners. The direction and depth of the supply-side research could be deepened either by exploring specific issues and challenges on the supply-side by looking at different niches of tourism or by a more extended survey of different destinations. It was observed that in some of the case studies with interviews with accommodation establishments were reaching a saturation point in terms of similar findings being reported in several interviews most especially from the category of small accommodation service providers, such as bed and breakfasts.

17. Conclusion

COVID-19 is reshaping the research agenda of tourism scholars (Persson-Fischer and Liu, 2021; Sharma, Thomas and Paul, 2021) including for African tourism researchers (Rogerson and Baum, 2020). The pandemic has fostered a heightened level of awareness of how important tourism experiences and consumption are for people and local communities (Saarinen and Wall-Reinius, 2021). In addition, the pandemic continues to exert drastic impacts upon the tourism sector and is projected to have significant potential to reform future landscapes and servicescapes (Sinha and Nair, 2020; Kowalska and Niezgoda, 2020; Gössling et al., 2021). Considerable international evidence already exists of shifts in consumer demand and in the character and patterns of domestic tourism which is occurring in North America, Europe and Australia. Arguably, certain other changes may emerge in the unforeseeable future.

Wen et al. (2020) maintain that COVID-19 can be expected to have far-reaching impacts on domestic tourists' consumption behaviour albeit recognising differences with individual's cultural backgrounds. Notwithstanding the potential for vaccines, the lingering impacts of the pandemic on the tourism psyche will ensure that a return to the pre-COVID-19 normal should not be taken for granted (Zenker and Kock, 2020). Sigala (2020:1) stresses "tourism demand is highly heterogenous and so, the impacts and transformations caused by the COVID-19 are varied across different tourism markets". In interrogating the likely short-term effects of COVID-19 Butler (2020: 664) flags the importance of differentiating between business and leisure tourism. For leisure travel the prospects are that with COVID-19 not being eradicated the measures of social distancing, restrictions or avoidance of large gatherings will influence where, why and how people travel, what they do and how they experience tourism destinations (Sigala, 2020; Jeon and Yang, 2021). Business tourism is the segment that is most unlikely to go back to the old normal as it is expected to endure the major long-term negative impacts as companies assess what is essential and non-essential travel (Rwigema, 2020).

Importantly, in the context of the global South it must be appreciated that the volume of future domestic tourism demand will be related closely to the performance of the national economy (Woyo, 2021). Arguably, under conditions of low or no economic growth, which are exacerbated by COVID-19 economy-wide impacts, the potential will be reduced for expanding demand for *any* tourism products. With this critical caveat, it is concluded that the analysis and findings from this research investigation provide the **foundations** of an evidence base to inform the Department of Tourism of policy opportunities in order to shape the tourism sector's supply and demand for meeting the needs and changing demands of South African domestic tourists in the COVID-19 environment.

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Appendix A: Interview Schedule for Supply-Side Investigation

COVID 19 in Domestic Tourism Sector Supply and Demand

BASIC QUESTIONS:

Name of Business:

Location of Business:

Type of Business (lodge, backpacker, spa, adventure tourism etc):

How many years in operation:

Size in terms of employees (permanent and part-time):

QUALITATIVE QUESTIONS:

1. Please describe in a word or a phrase what **the impact** of COVID 19 has been on your business

2. In a 'normal year' what is the split between domestic and international tourists (proportion)?

3. Do you foresee any **changes in demand** from domestic tourists given the COVID-19 pandemic?

4. How are you **responding in terms of changing or adjusting existing offerings i**n particular towards domestic tourist? (eg changing suites to self-catering, a la carte instead of buffet, more outdoor eating areas, new safety protocols (reduce touch points), price reductions, extending online or other marketing)

5. Have government regulations during this pandemic affected your business positively or negatively. Please describe.

6. In terms of your business responses to the COVID-19 environment what are the c**hallenges** that you face on adjusting your existing products or introducing new ones? (eg. financial, staffing, seasonality, lack of information, future uncertainty)

7. Do you see any new **opportunities** for your business in relation to the demands of domestic tourism?

8. Are you planning on introducing in future any **new products or offerings** – technology (website, marketing); investment in built environment, expansion of facilities)

9. Are you reducing or downsizing your product offerings in response to COVID 19.

10. In terms of responding to the COVID-19 environment do you **co-operate** in any way with other local businesses re-responses, sharing information or re-packaging product offerings?

11. What sort of **support or interventions** would you require to assist your business?

    a. What could **local government** do to positively assist your business (rates and taxes, local marketing)?

b. What sort of support would you require from **national government**? (infrastructure (road, rail, air), less red tape, improved public transport, improve the culture of travel, training, environmental impacts)

12. In terms of these interventions what in **the short-term** (one year) is the most important support/intervention that would assist you to responding to the challenges of supplying the domestic tourist market?

13. Without support what are the prospects for your business in 12 months-time?