tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

FINAL REPORT

SOUTH AFRICAN TOURISM SECTOR DEMAND AND SUPPLY- TOWARDS POST- COVID-19 RESILIENCE

ABBREVIATIONS	
GDP	Gross Domestic Product
SADC	Southern African Development Community: Refers to the fourteen countries, excluding South Africa, that belong to the Southern African Development Community (Statistics South Africa, 2021)
TSRP	Tourism Sector Recovery Plan
UNCTAD	United Nations Conference on Trade and Development
UNWTO	World Tourism Organization
WEF	World Economic Forum
WHO	World Health Organisation
WTTC	World Travel & Tourism Council

DEFINITION OF KEY TERMS	
Domestic Tourism	"Domestic tourism comprises the activities of a resident visitor within the country of reference, either as part of a domestic tourism trip or part of an outbound tourism trip" (World Tourism Organization, 2010:15)
International Tourism	"International tourism comprises inbound tourism and outbound tourism, that is to say, the activities of resident visitors outside the country of reference, either as part of domestic or outbound tourism trips and the activities of non-resident visitors within the country of reference on inbound tourism trips" (World Tourism Organization, 2010:15)
Tourism demand	An all-inclusive profile of the tourist in terms of their travel motivations, destination choice, consumptive decision-making (including constraints and perceived risk) and travel frequency.
Tourism resilience	"The capacity of […] systems to deal with stresses by maintaining the stability of the tourism-related regional economy while ensuring the flexibility and diversity necessary

	for innovation and further development" (Luthe & Wyss, 2014:161)
Tourism supply	The location-specific tourism value chain mechanisms, attributes and entities geared towards the satisfaction of tourist needs and subjective preferences
Tourist	A visitor who stays at least one night in collective or private accommodation in the place visited for less than twelve months (Statistics South Africa, 2021)
COVID-19	The novel coronavirus (SARS-CoV-2)

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1. Introduction and background

Tourism is widely considered to be a viable vector for sustainable socio-economic development on the African continent due to the integrative nature of its value chain (forward and backward linkages with suppliers and service providers), as well as economic multiplier effect (tourism receipts, export products, employment creation, local economic development) (Matiza & Slabbert, 2019). However, in light of the COVID-19 pandemic-induced moratorium on international travel, tourism demand is expected to contract by up to 75% in 2020 (Ruiz-Estrada, Park & Lee, 2020). According to the World Tourism Organisation globally tourism contracted with 73% in 2020 and 72% in 2021 (UNWTO, 2022). Arrivals to Africa contracted by 69% in 2020 and 74% in 2021. The result was the same for South Africa where arrivals contracted by 73% in 2020 and 78% in 2021 (UNWTO). The discovery of the new COVID-19 variant, Omicron, disrupted global travel again in 2021. As a result, a significant proportion of tourism destination countries focused on pivoting from international tourism toward domestic tourism as a strategy to resuscitate the tourism market (Organisation for Economic Cooperation and Development, OECD - 2020). However, in South Africa, the over-reliance on international tourists for many years added pressure to the industry but also a recognition of the importance of domestic tourists that should be the backbone of the industry.

South Africa's tourism sector is one of the industries hardest hit by the COVID-19 pandemic. However certain restrictions are preventing recovery and if South African tourism is to be resilient and be advanced as the catalyst for economic recovery in the South African post-COVID-19 pandemic era, fundamental changes - such as balancing supply with demand, offering products that better meet contemporary tourist demand and preferences, measuring the perceptions of tourists etc. - will need to occur within the South African tourism sector to reinvigorate tourism demand. It is also important to utilise information from lessons learnt in the past two years that will inform the tourism industry in similar circumstances moving forward.

One key approach to sustainable tourism recovery and resilience is the synchronisation of tourism demand and supply post-COVID-19, with the express aim of developing an integrated resilience model for the South African tourism sector.

There is currently a discernible need for research that will provide South African tourism practitioners and policy-makers with critical insights into supply (fluid risk strategy; adapting and adhering to tourist needs – SMME and macro perspectives) and demand (effective forecasting, changing travel behaviour and preferences – national and international perspectives). These insights will support South Africa's tourism recovery with data-driven, empirical evidence-based recommendations. More so, by synchronising contemporary tourism demand with tourism supply, South African tourism can re-imagine and re-position itself as a tourism destination of choice for both domestic and international tourists. However, synchronising tourism demand with tourism supply in South Africa would have been a challenge, even before COVID-19. Thus, the focus of the research is to gain research-based insights and information that will contribute to the sustainable recovery and 'future-proofing' of both domestic and international tourism in South Africa by developing a reflexive resilience model, with due consideration to the effects of COVID-19 on South Africa's tourism sector.

2. Context/rationale of the study

To mitigate the effects of COVID-19 on the health of citizens and the health care systems, most governments in the global village swiftly imposed home-stay lockdown measures which resulted in the decline of domestic and international tourism. The decline in regional, continental or international business and trade during COVID-19 is most likely to exacerbate the decline in tourism receipts as economies find it difficult to bounce back to pre-COVID-19 levels or better. There is also a possibility that as economies bounce back, most business tourism will remain subdued as businesses, meetings and conferences continue to operate virtually. This calls for new models to guide the responses, recovery and resilience of tourism amid and post-COVID-19. This is the focus of this research.

3. Problem statement

The sustainable growth and development of any tourism industry are dependent on attracting optimal international tourist arrivals and optimising domestic tourism and thereby ensure resilience. While the sheer scale and impact of the COVID-19 pandemic on the global travel and tourism industry are yet to fully unfold (McLaughlin, 2020), tourism recovery from external shocks associated with epidemics and disease outbreaks is estimated to take an average of 19.4 months and can significantly

impinge on demand for travel and tourism in the medium to long-term (Global Rescue & World Travel and Tourism Council, 2019). It is also evident that recovery might take longer than anticipated due to new variants emerging, the pace of the vaccine rollout, the effect of social distancing capacity of venues and facilities and concerned tourists about their safety when travelling. It is however important to assist the tourism industry to become more sustainable, more resilient and more innovative. The tourism industry is an economic, social and cultural asset in South Africa.

3.1 Tourism demand

3.1.1 International tourism demand

Buoyed by the country's abundant natural and cultural tourism resources, South Africa was between 2014 and 2018, Africa's most competitive travel and tourism destination, accounting for 70% of the Sub-Saharan African region's travel and tourism GDP (World Economic Forum, 2019). Notwithstanding the country's competitive and comparative tourism advantages, South Africa faces challenges as a tourism destination. Before the pandemic, tourism was being touted as an economic recovery trajectory for South Africa; however, even then, there appears to have been an emerging regressive trend in terms of South Africa's competitiveness in tourism. The fact remains that South Africa is the 61st most competitive travel and tourism destination in the world (WEF, 2019). More so, according to the World Economic Forum's Travel and Tourism Competitiveness Index (WEF, 2019), South Africa dropped eight places overall globally between 2017 and 2019, from 48th to 61st in the world. Notably, since 2015 there has also been a discernible regression 4th to 23rd and 25th to 60th in the competitiveness of South Africa's country brand strategy and the effectiveness of the country's marketing and branding activities in attracting tourists, respectively (WEF, 2019).

In 2018, South Africa's Travel and Tourism Gross Domestic Product (GDP) growth contracted by 1.9% year on year (WTTC, 2019). Relatedly, recent international tourist arrivals data from South African Tourism (2019) indicates that South Africa had a significant average international arrivals deficit of 2.3% by the end of Q3 2019 (6.78 million), compared to the same period in 2018 (7.73 million). Noteworthy declines include South Africa's traditional source markets of Germany (-7.4%), France (-9.5%), the United States of America (-0.5%), and the emerging source market of China (-

2.1%). Additionally, the COVID-19 pandemic has all but halted international tourism. Given the impending global re-set scenario in tourism, it will be prudent to determine the relationship between the evolving international tourism demand and tourism supply within the South African context to inform a resilience model that will aid in international tourism demand recovery.

3.1.2 Domestic tourism demand

The World Travel and Tourism Council (2019) reported that a significant proportion of global tourism spend in 2017 (73% or USD$3.9 trillion) was generated from domestic tourism. For instance, in 2017, Brazil's domestic tourism accounted for 94% of the country's tourism receipts, while it was up to 87% in the cases of India, Germany and China, respectively. However, unlike other tourism destination countries that have a predominantly domestic tourism industry-oriented market, the WTTC (2019) reports that domestic tourism in South Africa represents only 54% of the total tourism receipts in the country, which according to Statistics South Africa (2019) equates to just over R100 billion (USD$6 billion) indirectly attributable spend. Thus, South African tourism is significantly more susceptible to the impact of the COVID-19 pandemic due to its more evident reliance on international tourism arrivals compared to other countries - which have been halted due to the COVID-19 pandemic.

The focus on domestic tourism for the recovery of the global tourism sector may primarily be based on the notion that tourists are susceptible to the 'home-is-safer-than-abroad bias' (Wolff & Larsen, 2016; Wolff, Larsena & Øgaard, 2019) whereby, tourists perceive domestic travel and tourism to be *safer* than international tourism. As a result, the propensity for tourists to engage in tourism activity in the face of risk associated with crises such as terrorism, natural disasters and more pertinently, health pandemics is more plausible when considering domestic tourism (Adeloye, Carr & Insch, 2019; Wolff *et al*., 2019). To this end, the OECD (2020) reports that countries such as Switzerland have invested (an estimated USD$42.2 million or R717.4 million) in the sustainable promotion and subsidising of domestic tourism as part of its post-COVID-19 tourism recovery strategy. While, New Zealand, as part of a USD$256.8 million (R4.37 billion) incentive package for tourism recovery, is funding a domestic tourism marketing campaign and transition program aimed at 'pivoting' businesses towards domestic tourism, as well as support the strategic asset protection of New

Zealand's domestic tourism offerings and international brand (OECD - 2020). Thus, domestic tourism in South Africa may also be posited as a catalyst for tourism recovery, suggesting that the sustainable harnessing of domestic tourism will feature prominently as a pillar to the tourism-led post-COVID-19 crisis economic recovery of South Africa. This implies that South African tourism practitioners need to focus on promoting domestic tourism as a short-to-medium term measure for resuscitating South African tourism. The challenge, however, is boosting domestic tourism in South Africa by synchronising domestic tourism with the offering in the country to make it more attractive to South Africans and ensure resilience.

Within the context of both international and domestic tourism demand, the critical aspects are the profiling and evaluation of travel behaviour, risk perceptions, the willingness and ability of tourists to travel, inhibitors and constraints to travel, the travel motives of tourists and specific determinants of demand. Moreover, in light of the COVID-19 pandemic, gaps in knowledge relating to evolving international and domestic tourist perceptions of safety and product preferences require urgent attention.

3.1.3 Tourism supply

Notwithstanding the current significant government initiatives to buoy the tourism sector, the ongoing COVID-19 flu pandemic and its impact on global travel and tourism is unprecedented and still unfolding (Baldwin & di Mauro, 2020; Huynh, 2020; Ruiz-Estrada *et al*., 2020). The massive financial losses projected for the global tourism industry due to national and international lockdowns, stringent travel restrictions and social distancing protocols implemented to curtail the spread of the virus (Arezki & Nguyen, 2020; Novelli, Burgess, Jones & Ritchie, 2018), indicate the need for a significant and possibly radical paradigm shift in the delivery (supply) of tourism products (Gössling, Scott & Hall, 2020). Moreover, the onset of the COVID-19 pandemic also signalled the evolution of tourist behaviour - as tourists adapt to 'the new normal', suggesting that tourism practitioners and enterprises also need to be cognisant of the changes in tourist behaviour, as well as be proactive and reflexive to meet the evolving contemporary tourist demands and preferences effectively with suitable supply. As a result, the exposure and susceptibility of the tourism sector to external shocks and the resultant crises provides impetus for research into the

development of a *resilience model* to sustainably recover and grow demand for South Africa's tourism products by synchronising South Africa's tourism demand with the destination's supply. Critical to the growth and development of the tourism supply-side in South Africa are aspects of risk readiness, crisis recovery and sustainable tourism resilience in the medium to long term and related determinants.

In sum, the development of a resilience model for South African tourism is predicated on optimising tourism (domestic and international) demand and supply (SMMEs and macro businesses) in South Africa. However, due to financial capacity and technical expertise constraints, it is unfortunately quite common for African governments to develop generic policies and strategies without adequately involving/gaining the opinion of all the relevant stakeholders in the consultative process of developing policy and strategy. As a result, this often leads to potential policy and strategy misalignment with specific industry characteristics, challenges, and needs. As a result of the COVID-19 pandemic, there may also be an evolving misalliance between South Africa's tourism demand and tourism supply. Thus, it is important to profile South Africa's local and international tourism demand and an endeavour to more comprehensively synchronise South Africa's overall tourism demand aspects with the country's tourism supply attributes. To date, and to the best of the author's knowledge, no comprehensive tourism industry-oriented study has been conducted in South Africa to provide a cross-sectional and more pertinently longitudinal multi-stakeholder perspective to the *contemporary* tourism demand-supply nexus, and its potential influence on the resilience of tourism to the country.

A palpable information and knowledge gap with regards to South Africa's tourism demand-tourism supply nexus exists, and it appears as though to date, no studies seem to have comprehensively investigated the tourism demand-tourism supply nexus from a multi-tourism stakeholder perspective in the case of South Africa. More-so, no study seems to have profiled the distinct generic tourism typologies associated with South Africa and comprehensively interrogated the influence of these distinct typologies (supply-side attributes) on tourism demand concurrently. Additionally, within the context of the COVID-19 pandemic, while the (in)direct effects of the ongoing COVID-19 pandemic have been particularly deleterious to South African tourism, there appears to be minimal research evidence of the impact of the COVID-

19 pandemic on the demand side of domestic tourism. Hence, while there may be a probable link between perceived risk and the travel behaviour of both domestic and international tourists within the contemporary post-COVID-19 global tourism market, the nexus is yet to be established within the South African tourism context. Moreover, fewer studies seem to have been conducted, thus far, with regards to profiling both the South African domestic tourist, as well as the international traveller in light of the pandemic, thus potentially hamstringing South Africa's efforts to reposition itself to meet evolving tourist demand and preferences with innovative and suitable domestic tourism products, respectively. The gaps, as mentioned above, provide the impetus for this research study.

4. Purpose of the study

To bridge the potential identified gaps in South Africa's tourism demand and supply tourism, the proposed research will firstly explore South Africa's ability and response to adapt to risk and vulnerabilities as well as the country's media and marketing profile. Secondly, South Africa's domestic and international tourism demand profile (including disposable income, length of travel, perceived risk, level of interest, level of association and level of awareness, determinants of demand) and tourist's post-COVID-19 pandemic travel motives and behaviour (including holiday preferences and constraining factors) from a tourism demand-side perspective is determined. Moreover, input from the tourism supply-side to re-configuring South African tourism would be critical, hence the need for a multi-stakeholder approach to synchronising tourism demand and supply in South Africa. The key notion being that developing a TRM for South Africa will be predicated on initiating a better understanding of tourists and harmonising tourist's demand and preferences with the supply of attractive and innovative tourism products following the actions and response from government and relevant stakeholders.

5. Objectives of the study

The primary objective of the proposed research is to conduct a multi-stakeholder study on the tourism demand-supply nexus within the South African tourism context, with the overall aim of optimising the demand and supply of tourism in South Africa and developing a data-driven TRM for the country.

Objectives related to the demand focus of the study

- To explore South Africa's domestic and international tourism demand profile in terms of socio-demographic characteristics and travel frequency, and sources of information symmetry relating to South Africa as a tourism destination.
- To assess the travel behaviour, push and pull motives, willingness and ability to travel, and the travel needs of domestic and international tourists in South Africa.
- To determine the influence of potentially heightened risk perceptions associated with COVID-19 on domestic and international tourism demand in the near future, as well as inhibitions to both domestic and international travel and tourism.

Objectives related to the supply focus of the study

- To explore South Africa's domestic and international tourism supply profile regarding the country's inherent tourism products and competitive dimensions.
- To effectively determine the perceived domestic tourism market opportunities available in South Africa's tourism industry (leisure, business, medical and nature-based tourism typologies) based on insights from stakeholders from South Africa's tourism supply-side.
- Explore the COVID-19 related constraining factors influencing (SME and Macro tourism enterprises) business recovery and growth in relation to domestic and international tourism in South Africa, including business readiness and resilience to react to and adapt to rapid changes in the industry, respectively.
- To synchronise South Africa's domestic tourism demand and supply to enhance domestic and international tourism policy and marketing promotion strategy generally and in light of the current COVID-19 associated risk perceptions.

6. Literature review

The following literature review has been developed to enable the development of qualitative research instruments.

6.1 Overview of the COVID-19 pandemic and its impact on global tourism

Despite various global geopolitical stresses and periods of economic uncertainty, international tourism arrivals grew exponentially from 25 million in the 1950's to 1.4 billion in 2018 (World Economic Forum - WEF, 2020). Moreover, between the years 2000 and 2019, the global tourism Gross Domestic Product (GDP) tripled in value resulting in the global travel and tourism industry becoming a resilient creator of wealth (10.4% of global GDP) and economic opportunities (10% of all jobs globally) (WEF, 2020; World Bank, 2020a). Moreover, pre-2020, the global tourism industry accounted for at least a quarter of global the global trade in exports, translating to USD1.4 trillion (World Bank, 2020b). Cases of the novel coronavirus (SARS-CoV-2) or COVID-19 first emerged in Wuhan City, China in December 2019 (World Health Organisation – WHO, 2020). By March 2022, COVID-19 had infected an estimated 440 million people and accounted for 5.9 million deaths (WHO, 2022) - becoming the worst post-World War II pandemic to affect the world, surpassing the outbreaks of severe acute respiratory syndrome (SARS) in 2003 and the Middle East respiratory syndrome (MERS) in 2012 (Baldwin & di Mauro, 2020; Huynh, 2020; Ruiz-Estrada, Park & Lee, 2020). The uniqueness of the COVID-19 pandemic as a tourism crisis lies in its dual deleterious impact on both the demand and supply aspects of tourism (World Bank, 2020a); hence experience from the on-going COVID-19 pandemic has illustrated how the interconnectedness of tourism and its value-chain makes the whole tourism ecosystem susceptible to global crisis events and shocks (World Bank, 2020b).

In the wake of the COVID-19 outbreak national governments (including the South African government) introduced pandemic-induced moratoriums including national and international lockdowns, stringent travel restrictions and social distancing protocols to curtail the spread of the virus (Arezki & Nguyen, 2020). Government-led non-pharmaceutical policy interventions significantly impacted on international travel, to the extent that international tourism demand tourism in 2020 contracted by an

average of 74%, translating to upward of USD 1.3 trillion in tourism export revenues losses (Ruiz-Estrada et al., 2020; United Nations World Tourism Organisation - UNWTO, 2021a). More recent statistics suggest that in 2020 international tourism arrivals contracted by an average 88% compared to 2019 levels (United Nations Conference on Trade and Development – UNCTAD, 2021). Alarmingly, the sheer scale and impact of the COVID-19 pandemic on the global travel and tourism industry are yet to fully unfold (McLaughlin, 2020), suggesting continued massive financial loss projections for the global tourism industry, particularly buoyed by lags in vaccine rollouts in tourism destination countries. For instance, in 2021 alone, the global tourism sector is expected to lose between USD1.7 and USD 2.4 trillion, putting between 100 and 120 million direct tourism jobs are at stake in 2021 (UNCTAD, 2021; UNWTO, 2021b).

Based on experience from previous health-related crises, tourism recovery from external shocks associated with epidemics and disease outbreaks is estimated to take an average of 19.4 months (Global Rescue & World Travel and Tourism Council, 2019), however, due to evolving demand considerations and the particularly negative effect of government-led non-pharmaceutical interventions on the tourism supply, post-COVID-19 pandemic tourism recovery may take an estimated 24 to 36 months (UNWTO, 2021a). Thus, the COVID-19 pandemic can significantly impinge on tourism demand for travel and tourism in the medium to long term. To this end, conservative estimates suggest that the global tourism sector will only recover to 2019 levels in the year 2024 (UNWTO, 2021a). Going forward, the UNCTAD (2021) presents three scenarios for global tourism in 2021/22:

- *Scenario 1*: 74% reduction compared to 2019 levels;
- *Scenario 2*: An optimistic 63% contraction; or
- *Scenario 3*: 75% contraction in countries with low vaccination rates, and a 37% per cent reduction in countries with relatively high vaccination rates (at least 55% population vaccinated by June 2021 to include: Belgium, Canada, United States, Italy, France, Spain, the Netherlands, Greece, Portugal, and the UAE).

6.2 South Africa's Tourism Sector (2017-2019)

Statistics from the National Department of Tourism (NDT, 2019) indicate that South Africa attracted an average of 10.35 million international tourists between 2017 and 2018, with an annual growth rate of 1.8% compared to the global average of 6%. Furthermore, in 2017, the South African travel and tourism sector accounted for 722 013 direct employment opportunities (4.5% of national total) and contributed R141.6 billion (2.9% of GDP) to the country's GDP. In 2019, South Africa attracted 10.2 million inbound tourists which was a decline of -2.2% compared to 2018 arrivals data (NDT, 2020). As a result, the data reflected a decline tourism's direct contribution to South Africa's GDP to R136.9 billion in 2019, contrasted by an increase in direct economic opportunities – to 759 900 jobs in 2019 (up to 4.7% of national total) (NDT, 2020). Interestingly, in 2019, South Africa also became Africa's second-largest tourism economy by GDP contribution (World Travel and Tourism Council - WTTC, 2020). Despite the palpable socio-economic contribution of South Africa's tourism sector to the country's economy, of particular interest to the resilience of South African tourism is the competitiveness of the country as an attractive tourism destination for both domestic and more significantly, international tourists. South Africa's competitiveness as a tourism destination in 2017 was negatively impacted (48th/141 countries in 2015 versus 53rd/136 countries in 2017) primarily driven by the poor country's safety and security (120th/136), as well as negatively perceived environmental sustainability (117th/136). Other secondary factors included the discernible challenges of South Africa in terms of the decline in efforts made by the government to support the travel and tourism sector (59th/136 in 2017 versus 29th/141 in 2015) and less effective marketing campaigns in attracting tourists (40th/136 in 2017 versus 25th/141 in 2015). (WEF, 2015, 2017). Despite this trend and buoyed by the country's abundant natural and cultural tourism resources, South Africa was up to 2018, Africa's most competitive travel and tourism destination.

Notwithstanding, the country's competitive and comparative tourism advantages, South Africa has faced challenges as a tourism destination. Immediately prior to the pandemic – in 2019 - Mauritius (54th/140) overtook South Africa (61st/140) as the most competitive travel and tourist destination on the African continent (WEF, 2019). However, South Africa remained Southern Africa's most competitive travel and tourism destination accounting for 70% of the region's travel and tourism GDP (WEF,

2019). While tourism was being touted as an economic recovery trajectory for South Africa, even then there appears to have been an emerging regressive trend in terms of South Africa's competitiveness in tourism. The fact remains that South Africa is the 61st most competitive travel and tourism destination in the world (WEF, 2019). More so, according to the World Economic Forum's Travel and Tourism Competitiveness Index (WEF, 2019), South Africa dropped eight places overall globally in the between 2017 and 2019, from 48th to 61st in the world. Notably, since 2015 there has also been a discernible regression 4th to 23rd and 25th to 60th in the competitiveness of South Africa's country brand strategy and the effectiveness of the country's marketing and branding activities in attracting tourists, respectively (WEF, 2019). In 2018, South Africa's Travel and Tourism Gross Domestic Product (GDP) growth contracted by 1.9% year on year (WTTC, 2019). Relatedly, pre-crisis international tourist arrivals data from South African Tourism (2019) indicates that South Africa had a significant average international arrivals deficit of 2.3% by the end of Q3 2019 (6.78 million), compared to the same period in 2018 (7.73 million). Noteworthy declines include South Africa's traditional source markets of Germany (-7.4%), France (-9.5%), the United States of America (-0.5%) and the emerging source market of China (-2.1%) (South African Tourism, 2019).

6.3 The COVID-19 Pandemic and South African Tourism

South Africa reported its first confirmed COVID-19 case on the 5th of March 2020, and since then the country from the 26th of March to date has been under a national state of emergency (International Monetary Fund – IMF, 2021; Moonasar, Pillay, Leonard et al., 2021). Considering the COVID-19 pandemic, the UNCTAD (2021) estimates that South Africa experienced 70% contraction in international tourist arrivals in 2020 alone. While statistics from Statistics South Africa (2021) reported only 2.8 million inbound tourists (-72.6%) to the country in 2020 compared to 10.2 million inbound tourists in the previous year, with no inbound tourists reported between April and September 2020 due to a complete ban on international travel. Losses in South Africa's tourism receipts on the country's current trajectory could translate to an 8.1% decline in the country's travel and tourism GDP contribution, and a potential loss of at least 11.8 million (in)direct jobs in the South African economy (UNCTAD, 2021). The resilience of South Africa as a tourism destination is, however, predicated on country-specific factors such as the local policy environment, public health strategy, ICT

environment and readiness, government policy on tourism, and the extent of development in tourist service infrastructure (World Bank, 2020a).

6.3.1 Local policy environment

South Africa's local policy environment is currently dominated by non-pharmaceutical interventions that have been implemented through the National COVID-19 Command Council (NCCC) as a 'government-wide' multi-sectoral response to the COVID-19 outbreak. Interventions are currently implemented via a Declaration of a national state of disaster (Dlamini-Zuma, 2020), through legislation gazetted by the Minister of Cooperative Governance and Traditional Affairs (COGTA), designated under section 3 and 27(2) of the Disaster Management Act, 2002 (Act No. 57 of 2002). While prescriptive and aimed at preventing disease spread and mitigating the effects of the pandemic on public health resources, government interventions as can be anticipated have severely impacted both domestic and most critically international tourism (see Global Rescue & World Travel and Tourism Council, 2019). Interventions have to date included a full or adjusted cocktail of measures all of which invariably adversely impacted on South African tourism (IMF, 2021):

- The allocation of funding to a solidarity fund to help combat the spread of the virus, with the assistance of private contributions, and support municipal provision of emergency water supply, increased sanitation in public transport, as well as food and shelter for the homeless;
- Embarked on mass screening and testing;
- Introduced mobile technology to track and trace contacts of those infected.

More significantly, the NCCC administers a five-level risk-adjusted strategy to contain the spread of COVID-19 by imposing various economic and social measures including (Moonasar et al., 2021),

- Travel bans on visitors from high-risk countries and quarantine for nationals returning from those countries;
- Instituted social distancing and mask protocols in public spaces, including carrying capacity restrictions for buildings;
- Domestic travel bans (lockdowns) and curfews;

- Rigorous screening at ports of entry;
- School closures and rotational systems;
- Variations in alcohol and cigarette bans; and
- Restrictions on sit-down restaurants; hotels; conference centres; casinos; non-contact sports; and personal care services.

While government's state of disaster is geared towards managing and mitigating the spread and effects of the COVID-19 on citizens and the South African economy, it is important to note that the sheer scale and pervasiveness of the pandemic require unprecedented interventions. It is also important to acknowledge that these measures have had a deleterious effect on both domestic and international tourism, as have previous non-pharmaceutical interventions from previous crisis events (see Tourism Sector Recovery Plan - TSRP, 2020:38).

6.3.2 Public health strategy

The South African National Department of Health (NDH) adapted the WHO strategy for containing and mitigating the spread of the COVID-19 virus, the Framework for Public Health Emergency Operations Centre (WHO, 2015). The NDH in conjunction with the NCCC and the legislative framework [Disaster Management Act, 2002 (Act No. 57 of 2002)] established incident teams in the following functions, (1) Governance and Leadership, (2) Medical Supplies, (3) Port Health and Environmental Health, (4) Epidemiology and Response, (5) Facility Readiness & Case Management, (6) Emergency Medical Services, (7) Information Systems, (8) Risk Communication & Community Engagement, (9) Occupational Health and Safety and Human Resources (Moonasar et al., 2021). The South African public health strategy for COVID-19 includes the following (IMF, 2021; Moonasar et al., 2021; Reddy et al., 2021):

- Provision of effective governance and leadership
- The strengthening of surveillance and strategic information dissemination
- Augmented health systems readiness including emergency medical services provision
- Enhanced community engagement
- Improved laboratory capacity and testing
- Clarified care pathways

- Scaled-up infection prevention and control measures
- Boosted capacity at ports of entry.
- Expedited research and introduction of therapeutics, diagnostics and vaccines

The vaccine roll-out is key to the recovery of the global tourism sector (UNCTAD, 2021), more so for South Africa. To this end, South Africa's primary public health strategy going forward should be the vaccination program (Gursoy, Can, Williams & Ekinci, 2021; UNCTAD, 2021; Yang, Ruan, Huang, Lan & Wang, 2021). To date 32 million doses were given, 17.3 million people have been fully vaccinated – thus 29.2% (SA Government, 2022).

6.3.3 ICT environment and readiness

South Africa is Africa's largest and most advanced Information and Communications Technology market [based on various global rankings cited in a report by Gillwald, Mothobi & Rademan, 2018] including in aspects such as sim [telecommunications mobile subscriptions (94 million) and smartphone subscriptions (60 million) in 2020] and internet (63% of the population) penetration (Independent Communications Authority of South Africa – ICASA, 2021). According to the UNWTO (2020) the realignment of the ICT sector with the contemporary global environment will be key to the recovery, and by extension the resilience of the African tourism sector. To date, South Africa's ICT capabilities have facilitated the following COVID-19 related public health strategy interventions (Moonasar et al., 2021),

- Community screening and digital contact tracing via COVID-Connect
- Communication platforms for information dissemination through a variety of channels including WhatsApp, radio, television and the internet in all the official South African languages
- Online registration for vaccination - Electronic Vaccination Data System (EVDS)

From a tourism perspective, pre the pandemic, in 2019 South Africa's ICT environment was ranked by the WEF (2019) as 68th/140 most competitive in the world. The ranking [out of 140 countries] was supported by relatively high rankings compared to other African and global tourism destination countries in: ICT business-to-business

transactions (60th); ICT use business-to-consumer (46th); Internet users as a percentage of the population (83rd); and Mobile network coverage (35th). South Africa's pre-COVID competitiveness suggests that the country's ICT environment and readiness will be able to support critical tourism initiatives such as the impending vaccination passport (Pavli & Maltezou, 2021; Susi & Pajuste, 2021) and e-Visa (Southafrica Visa, 2021; TSRP, 2021) drives as critical issues of digitalisation-oriented competitive advantage of tourism in the era of COVID-19**.**

6.3.4 Government policy on tourism

National governments globally have implemented tourism-specific policy interventions to aid in the recovery of their respective tourism sectors across the tourism value-chain, through sub-sectors such as hospitality, food services, hotels, and airlines (World Bank, 2020a). The NDT has instituted the TSRP (2020, 2021) under the auspices of the South African National Government's Economic Reconstruction and Recovery Plan (ERRP), with the aim of (1) Re-igniting tourism demand, (2) Protecting and rejuvenating supply, and (3) Strengthening enabling capability for long term sustainability. According to the IMF (2021) and the TSRP (2021), to date the South African government implemented some of the following measures to support the tourism sector:

- Funding to assist SMEs under stress, mainly in the tourism and hospitality sectors, including a Rand Tourism Equity Fund (R1.2 billion)
- R200 billion funding facility in conjunction with the SARB and commercial banks for tourism businesses to access liquidity to protect tourism assets, and core infrastructure
- Loan guarantee scheme to provide bank loans, guaranteed by the government, to eligible businesses to assist them during the pandemic with operational expenses.
- The revenue administration accelerated reimbursements and tax credits, allowing SMEs to defer certain tax liabilities, and issued a list of essential goods for a full rebate of customs duty and import VAT exemption. A 4-month skills development levy tax holiday was also implemented.
- Launch of an investment and market-entry facilitation programme to stimulate capital investment, sector transformation and product diversification

- A new temporary COVID-19 grant, created to cover unemployed workers that do not receive grants or UIF benefits [extended through April 2021]
- The government assisted companies and workers facing distress through the Unemployment Insurance Fund (UIF) and special programs from the Industrial Development Corporation
- Funds made available for the health response to COVID-19, workers with an income below a certain threshold received a small tax subsidy for four months, and the most vulnerable families received temporarily higher social grant amounts [until October 2020].

While there appear to be significant considerations made by the South African government for the tourism sector, the UNCTAD (2021) does, however, provide a cautionary statement regarding post-COVID-19 tourism. They predict that once travel restrictions are lifted and there is an uptake in tourism, not all tourism enterprises that have survived that pandemic will be able to recover. Developing and emerging economies such as South Africa cannot take the fiscal measures that developed nations have adopted to support their respective tourism sectors, therefore, "Governments need to decide which [businesses] to support and for how long." (UNCTAD, 2021:19).

6.3.5 Tourist service infrastructure

Prior to the pandemic, one of the tourism sector's major challenges was the South African governments limited prioritisation of the sector (ranked 75th/140 countries in 2019) and governments budgetary allocation to the sector (136th/140 countries in 2019). This may suggest the reliance of the South African tourism sector on private investment and equity for tourism-related infrastructure development, revitalisation and maintenance (TSRP, 2020, 2021). Notably, South Africa's poor safety and security may impinge on the revitalisation of both domestic and international tourism, considering that prior to the July unrest (see Harding, 2021), South Africa was ranked 132nd out of 140 countries in terms of perceived safety and security of tourists (WEF, 2019). Additionally, post-COVID-19 tourism service infrastructure competitiveness will also include health and hygiene aspects such as the availability of medical personnel and availability of public resources such as hospital beds for which South Africa was

ranked 95th and 72nd out of 140 countries in 2019, respectively (WEF, 2019). However, the UNCTAD (2021) cautions that COVID-19 is likely to be a public health concern for the foreseeable future and that the long-term implications of the pandemic may result in the need to diversify resources from tourism as part of an unavoidable structural adjustment. Thus, considerations will have to be made to the competitiveness of South Africa with limited resources and possibly depleted tourism supply induced by economic fall-out of the on-going pandemic (see Department of Tourism, Tourism Business Council of South Africa and International Finance Corporation, 2020a, 2002b, 2020c; TSRP, 2020).

6.4 In-depth policy and institutional reviews on building back better in South Africa

The overarching document that lays out the institutional measures from the state to assist the economy to build back better is the Economic Reconstruction and Recovery Plan (ERRP).[1] The plan identifies eight priority interventions, with one of these being the support for tourism recovery and growth through enablers such as macroeconomic interventions towards fiscal sustainability, regulatory changes to enable growth, building a capable state, economic diplomacy and Africa integration, and skills development. The interventions were planned to be affected in three phases. Phase one was for engaging and preserving, phase two was for recovering and reforming and the third was for reconstructing and transforming.

The three phases of interventions are a mirror reflection of the triple-R framework (response, recovery and resilience) of building back better. The same three are also reflected in the Tourism Sector Recovery Plan (TSRP)[2] where the first phase relates to protecting supply, the second phase relates to matching supply with demand and the third phase relates to sustaining growth. Also, globally, the Multilateral Organisations such as UNTWO, PATA, WTTC, African Union, and G20 have devised intervention measures that have been centred around three themes – Mitigate, Restart and Reimagine – that are a mirror reflection of the triple-R framework. The mitigation

[1] https://www.gov.za/sites/default/files/gcis_document/202010/south-african-economic-reconstruction-and-recovery-plan.pdf accessed 1 August 2021.
[2] https://www.gov.za/sites/default/files/gcis_document/202008/tourismrecoveryplan.pdf accessed 1 August 2021

phase is short-term, but the most important action to put people first and lessen the impact of the virus on people, communities and businesses. This was done through sharing reliable information, building public-private partnerships and starting to plan immediately. The restarting phase was to be done through preparation, conducting risk and threat assessments and pre-COVID market assessments. Thereafter, comprehensive recovery plans to boost the industry after the pandemic are recommended and positive content aggregation prioritised. The third phase was for reimagining, which required focus on ensuring that tourism is resilient to future crises by continuously adapting to new innovations. This was earmarked to be done by shifting to sustainable tourism, focusing on skills development and reinforcing governance. The next sections expand on the interventions in each of these stages.

6.4.1 Tourism institutional responses

The impact of COVID-19 on the tourism sector and its value chain have been massive. International travel was curtailed, and this affected tourism businesses and entrepreneurs. The survey carried by the collaborative effort of the World Bank, Department of Tourism, and Tourism Business Council of South Africa in 2020 revealed that on average, half of the operating entrepreneurs in the tourism sector reduced wages, with the conservancy/protected areas having the maximum cuts of 77 percent and the community-based entrepreneurs with the minimum cuts of 13 percent. The average number of furloughed workers was 32 percent, with the maximum period of unpaid time off being recorded in the sub-sectors of transport and tour operators who both recorded 36 percent of furloughed staff. The average redundancy rate was 11 percent, with the highest recorded in the community-based tourism enterprises. The TSRP assessed the risk of business closure to be 63 percent assuming no demand and statutory intervention. It became therefore critical that the state responds quickly to support the survival of supply.

To protect supply, a number of general business continuity support interventions were put in place, of which tourism businesses could also benefit from. The Government, working together with the South African Reserve Bank and commercial banks, created a R200 billion COVID-19 facility to be accessed by businesses in different sectors of the South African economy. Tourism-specific measures included the R200 million

Tourism Relief Fund, the R30 million Tourist Guide Relief package, and the waiver on Tourism Grading fees.

Other interventions that also benefited business operators in the tourism sector included the creation of a solidarity fund providing seed capital of R150 million, increasing assistance to small and medium-sized enterprises (SMEs), and providing a tax subsidy of up to R500 per month for the next four months for those private sector employees earning below R6,500 Rand a month, under the Employment Tax Incentive. The South African Revenue Service was to also work towards accelerating the payment of employment tax incentive reimbursements from twice a year to monthly to provide immediate cash to compliant employers as soon as possible. Tax compliant businesses with a turnover of less than R50 million were to be allowed to delay 20 percent of their pay-as-you-earn liabilities over a period of four months and a portion of their provisional corporate income tax payments without penalties or interest over a period of six months. This intervention was expected to assist over 75 000 SMEs.

6.4.2 Tourism institutional responses: TSRP

To restart the economy within the tourism context and match tourism supply with demand, three responses are identified in the TSRP. First was the introduction of national standards for safe tourism operations, inspired by globally recognised biosecurity protocols across the tourism value chain to reduce transmission risk. This was meant to enable safe travel and rebuild traveller confidence, which was at an all-time low in recent times. Several tourism sub-sectors within the tourism value chain became candidates for early resumption and initial steps to allow business travel operations to be used as a proof-point for broader re-opening.

The second intervention at recovery level was that of engaging other departments to build on the work of improving access into South Africa. Partnerships were created with the police to improve tourists' safety and with the Department of Home Affairs to finalise the introduction of e-visa programme for priority markets. Other partnerships with relevant stakeholders were also made to ensure effectiveness in licensing of tour operators and stimulate tourism demand.

The third were the interventions on the demand side, which were split into domestic and international demand. The former was to be catalysed through the phases of economic re-opening with informative and inspirational messaging that encourages safe tourism and domestic vacation experiences. Given the scepticism in international travel and uncertain timing, identifying and promoting the highest-potential inbound target segments, which has less uncertainty, was seen by the TSRP as foundational to the recovery strategy. However, the TSRP acknowledged that the pandemic is forcing a rethink of segmentation and more than ever, traveller psychology will be driven by universal factors.

The international travel was to be boosted through a planned implementation of a global marketing and travel trade programme, targeted at highest-potential source international markets such as Germany, the UK, France, China, India, Netherlands, Australia, the USA and Canada and high-potential regional markets such as Tanzania, Kenya, Nigeria and the DRC. This was important because the return of global tourism could see varying rates of recovery in source markets and marketing investment must be carefully conserved to achieve maximum impact through the recovery cycle.

6.4.3 Building resilience

This phase is for sustaining growth and transformation by strengthening the enabling capacity for the tourism sector to thrive. The TSRP envisions this to be done through the prioritising cooperation with neighbouring destinations towards a regional value proposition and a seamless visitor experience. This is important because international travellers who embark on a once-off trip to the region typically get to visit not only South Africa, but Botswana, Namibia and the Victoria Falls viewed either from Zambia or Zimbabwe. In addition, South Africa is a critical transit hub on which these countries depend for their arrivals. Given that the coordination between destinations within these countries is currently limited, regional assets are therefore not leveraged on and this has impacted on sustaining tourism growth.

The other recommendation from the TSRP to provide an enabling environment for tourism agents is to launch an investment and market-entry facilitation programme to stimulate capital investment, sector transformation and product diversification. Investment is particularly needed to create sufficient supply capacity that will boost

product diversification and unserved market needs, potentially contributing to economic growth. COVID-19 has currently reduced supply due to closure of some tourism businesses. Therefore, a concerted focus on investment-led economic growth is required through promoting investments in unserved niches and market-entry facilitation programmes. Along these lines, the TSRP therefore recommends the review and transform of the tourism policy and institutional support measures to deliver efficient, effective and purpose-led support for tourism sector growth.

7. RESEARCH METHODOLOGY

A two-pronged approach was followed in this research. Firstly, a desktop review was completed after which empirical research with reference to both qualitative and quantitative research was conducted.

7.1 Desktop review

The EMM phased approach allows for the triangulation of the data generated by the research, whereby Phase 1 methodology includes a desktop baseline study exploring the literature on all the fundamental concepts of the respective research studies, including frameworks and models on tourist motives, tourist demand factors, tourism risk factors, as well as destination attributes (supply fundamentals) to develop the initial hypothesis and measuring instrument(s) for the whole study. Various industry reports, academic and non-academic articles and media reports were utilised to include the most relevant information related to the focus. The desktop research focused on a PESTLG Analysis Model framework which analysed South Africa's macro-environment (5 years), as well as the global tourism market based on political, economic, socio-cultural, technology, legal and governance aspects, taking into account the effect of COVID-19 on South Africa and the international tourism market. Sources of the secondary data included, but were not limited to the:

- World Economic Forum competitiveness reports and indexes
- Multiple United Nations agency reports including UNDP, UNCTAD, UNWTO
- Organisation for Economic Co-operation and Development reports
- Completed postgraduate studies related to the current research focus
- Relevant reports from South African Tourism and the National Department of Tourism

A 5-year Tourism Trend Analysis was also be conducted as part of the desk research. This analysis focused on South African domestic and international tourism and presents a comprehensive report on domestic and international tourists regarding tourist arrivals, the purpose of visit, tourist spend and length of stay. Sources of the data included, but was not limited to reports from the:

- World Travel & Tourism Council (WTTC)
- South Africa Tourism
- UN-World Tourism Organisation
- Stats-SA

The keywords included: tourism, resilience, COVID-19, international, domestic, tourists, South Africa. Due to the fluidness of the information related to COVID-19 a continuous update of the relevant information was needed. More significantly, desktop research reviewed the literature to formulate the hypotheses, as per the model, of the study, as well as develop the respective questionnaire(s) for the proposed research. Relevant studies were consulted to create the measuring instruments based on validated tools, and where needed, new instruments were being developed.

7.2 Qualitative Research: Phase 1

The generation of insights following the desktop review includes interviews with key informants to gain insights relevant to the industry which will refine and validate the measuring instrument(s) developed for the proposed study. Based on the qualitative patterns and themes, the research instrument(s) for Phase 2 was finalised.

7.2.1 Qualitative Research: Sample

The universal sample consisted of tourism industry practitioners, including key informants in tourism-oriented government and quasi-government organisations, tourism enterprises in the private sector, and academics. Non-probability (judgemental purposive) sampling was applied to sample the key informants. A total of *n*=16 key informants were anticipated with n=9 final interviews, reaching saturation. Participants for the interviews were purposively recruited through personal contact and professional networks. Judgemental sampling was applied to select the respondents

to be interviewed as a demand (Section A questions) or a supply-oriented (Section B questions) respondent. The criteria for sample qualification included the following:

- Tourism academics (proposal reviewers: Tourism Management Scientific Committee and EMS-REC at the NWU). Criteria included faculty to be in tourism with (a) expertise and experience in tourism marketing, tourism economics or travel behaviour, (b) 5-year research profile, (c) research ethics training.
- Travel agents (e.g. Flight Centre, Thompson tours), local and international tourism product owners (e.g. events, nature, hospitality, air travel sub-sectors), buyers (international tour operators) and service providers (digital site owners such as Lekkerslaap and Table Mountain Aerial Cableway). Criteria included two individuals from the groups with (a) at least five years' experience in their functional area (b) in-depth knowledge of the South African tourism sector.
- Tourism practitioners in government (such as NDT) and quasi-government organisations (SA Tourism, Brand SA, TBCSA). Criteria included at least two individuals from the aforementioned groups with (a) at least five years' experience in their functional area (b) in-depth knowledge of the South African tourism sector.

Specifically for Phase 1 of the model the following:

The approach taken to collect information that informs the development of the phase one, was predominantly desk-based, and coupled with a few key informant interviews. For the former approach, documentation review and COVID-19 and tourism related databases assessments were done. For the latter, officers in tourism institutions in South Africa were requested to respond to the interview guide provided in Annexure

7.2.2 Qualitative Research: Empirical data collection

The primary empirical qualitative phase of the proposed study will entail data generation via semi-structured interviews. Experienced qualitative researchers will convene the interviews to maximise the research value associated with soliciting information and data from key informants. A set of pre-determined questions will be utilised from a discussion guide (Appendix B). The semi-structured nature of the method will ensure that the interviewer can further probe interviewees to elaborate on their responses. Interviews will be an estimated 30 to 45 minutes. They will be audio recorded via online platforms including Zoom, Google Meet or Microsoft Teams for

transcription to allow for free-flowing conversations throughout the process and ensure safety and convenience in light of COVID-19.

Specifically for Phase 1 of the model the following:

Desk-based review

A range of documents on measures taken to rescue the tourism sector were assembled. These were categorised as follows: (1) academic literature – the peer reviewed articles on tourism and COVID-19 in South Africa in particular and other BRICS countries in general; (2) legal documents – these related to the regulations and promulgated Acts of parliament that were put in place and had an effect on the tourism sector; (3) institutional documents – a number of tourism organisations, including the government and multilateral organisations, attempted to find ways to quickly bounce back from the shock of COVID-19 and these documents were reviewed; (4) grey literature – a lot of articles that are not academic nor institutional that were produced by independent stakeholders were also accommodated and reviewed (5) online webinars – the research team attended any webinar that could provide information on COVID-19 and tourism.

Several online databases were developed to track government responses to COVID-19. Two databases dominated the assessment and these were those developed by the UNWTO and the International Policy Centre for Inclusive Growth. The databases have some interactive dashboards that provide the detailed measures taken by countries to bounce back better. Other databases that were visited were those that related to the numbers of infections brought about by COVID-19 and the electronic vaccination data systems.

Key Informant Interviews

Given that the development of the phase 1 model did not depend on perception but on what has taken place as evidenced in statistics, reports and databases, the key informant interviews were meant to be complementary. For this purpose, four tourism organisations were approached and interviewed. Of particular interest was the Kruger National Park as it is one of the most attractive tourism places in South Africa. The government-related department where the Kruger National Park is located was also approached to get a sense of government responses in the district, which potentially

could influence how tourism particularly at Kruger could bounce back. Therefore, the officers from the Department of Economic Development, Environment and Tourism Limpopo, Vhembe District Municipality and Limpopo Tourism Agency were identified and asked to participate in the study. Several methods were used to reach to the key informants. Microsoft Teams, telephone interview and face-to-face were used to gather the views from the officers concerning measures that are being put in place for tourism to bounce back better.

7.2.3 Qualitative Research: Data analysis

Data generated from all phases of the proposed research will be analysed utilising various scientific methods. To draw meaning, context, patterns, themes and propositions related to the measuring instrument and the study in general, qualitative data will be analysed by utilising Atlasti or NVIVO software to employ,

- Content analysis (conventional, directed & summative) – drawing descriptive meaning from transcriptions of the focus groups and the consultative panel.
- Narrative analysis – drawing themes, patterns and contexts from the qualitative data.
- Discourse analyses

This will result in a narrative section in the report.

7.3 Quantitative research: Phase 2

The quantitative study (Phase 2) focuses on the methodology to subsequently collect all the required data to address the objectives of the study, including profiling both domestic and international tourists, generalised tourist motivations, travel decision process, perceptions of South Africa as a domestic and international tourism destination, South Africa's tourism destination attributes, as well as the opportunities and barriers (perceived risk and tourism safety factors) associated with South Africa as a domestic and international tourism destination in light of the COVID-19 pandemic.

7.3.1 Quantitative Research: Sample

The domestic aspect surveyed South African consumers as potential domestic tourists. In this case, a potential domestic tourist can be someone that travelled before or will travel in the next few years in South Africa. These were the target population

for the domestic tourism aspect of the proposed study. Non-probability sampling was applied, meaning the study population was not randomly selected. Non-probability sampling is consistent with sampling for online surveys (Nayak & Narayan, 2019). The survey was distributed to a pre-recruited panel of South African consumers, administered by iFeedback, a South African research firm. The database of iFeedback can select only South Africans to participate in this study. To ensure sample validity, the survey sample size will be based on the sampling heuristics proposed by Krejcie and Morgan (1970: 607), which recommend a minimum sample of *n*=384 for universal populations over 1 million individuals.

The target population for the international survey was potential international tourists to South Africa for the international survey. Purposive sampling was implemented for the proposed study, meaning the population was not randomly selected. Purposive-convenience sampling involves identifying and deliberately selecting key informants with the insights relating to the study for data generation purposes. Convenience and total population sampling were employed. All possible individuals (as potential international tourists) conveniently available on Amazon's Mechanical Turk (MTurk) crowd-sourcing platform were allowed to participate in the study. However, the sample size was guided by both probability and non-probability sample procedures. A minimum sample size of *n*=384 will be suitable for the proposed study considering that the population cannot be ascertained before the proposed research. However, based on previous reports selected major source markets to South Africa (pre-COVID) were selected including the United States of America, the United Kingdom, India and Brazil. MTurk's exclusion and inclusion function were utilised to select respondents from these specified markets.

7.3.2 Quantitative Research: Measuring instruments

The questionnaires were developed in English and were accompanied by a consent letter explaining the purpose of the study (see Appendix A). The respective questionnaires (see Appendix B) were then administered online on iFeedback and MTurk.

The domestic demand questionnaire consisted of the following sections,

- Section A solicited socio-demographic information. The socio-demographic information was limited to the respondent's age range, the gender they identify with, educational level, marital status, travel companionship, and their region of residence. Previous tourism studies (Lu & Atadil, 2021) have shown that socio-demographic factors such as age, gender, level of education, and origin are crucial for validating and generalisation the findings related to tourist behaviour studies. Additionally, respondents were asked whether they have travelled for tourism purposes before and which channels they utilise to gather information about tourism destinations.
- Section B solicited data that explores domestic tourism demand. This data included five items supported by the literature to measure the push travel motives. Section B solicited data that explores Domestic Brand Equity (DBE) comprised of four items adapted from the literature respectively on the awareness, association and interest (Aziz & Yasin, 2010; Basaran, 2016; Martín, Herrero & Salmones, 2019) of tourists with regards to South African tourism. Responses were recorded on a five-point Likert scale of agreement, where 1 = 'Strongly disagree' and 5 = 'Strongly agree'.
- Section C is referred to as MACRO I factors beyond the control of tourism practitioners. Section C measured 16 statements associated with perceived psychological, social, physical and financial risk, respectively. Perceived risk is critical to tourist decision-making and can impact the 8 rationality of tourist decisions and destination choice (Chew & Jahari, 2014; Deng & Ritchie, 2018). Hence, it is important that the perceived risk associated with travel be determined to better understand tourists and their behaviour towards uncertainty. Items were measured based on aspects adapted from previous empirical studies (see Adam, 2015; Deng & Ritchie, 2018; Fuchs & Reichel, 2006; Fuchs & Reichel, 2011; Olya & Al-ansi, 2018; Qi et al., 2009; Wang, 2017). Responses were recorded on a five-point Likert scale of agreement, where 1 = 'Strongly disagree' and 5 = 'Strongly agree'. Section C also measured perceived safety associated with travel and tourism-related activity in South Africa. Perceived safety was measured based on eight statements adapted from the extent of the literature (see Adam, 2015; Reisinger & Mavondo, 2005; Rittichainuwat & Chakraborty, 2012). Responses were recorded on a five-point Likert scale of safety, where 1 = 'Very risky' and 5 = 'Very safe'.

- Section D measured MESO factors that are local market-specific and more localised factors. Section D first measured the pull travel motives of domestic tourists. Ten statements measured South Africa's destination attributes. Items were measured based on aspects adapted from previous empirical studies (see Filistanova, 2017; Gautam, 2018; Mapingure, du Plessis & Saayman, 2019; Saiprasert, 2011; Seyidov & Adomaitienė, 2016). Responses were recorded on a five-point Likert scale of likelihood, where 1 = 'Extremely unlikely' and 5 = 'Extremely likely'. Section D also measured the perceived effectiveness of pharmaceutical and non-pharmaceutical interventions. Five items were drawn and adapted from previous studies (Liu, Schroeder, Pennington-Gray & Farajat, 2016), which will establish the perceived effectiveness of interventions. Responses were recorded on a five-point Likert scale of effectiveness, where 1 = ' Very ineffective' and 5 = 'Very effective.'
- Section E are MACRO II factors that measured the influence of South Africa's destination media profile. 12 statements associated with the influence of South Africa's tourism's media and marketing profile - which is where potential domestic tourists derive the information which they utilise as heuristic cues in their decision-making (Fuchs & Reichel, 2011). Items were measured based on aspects adapted from previous empirical studies (see Adeola & Evans, 2019; Gong & Tung, 2017; Huong & Lee, 2017; Hyun, 2006; Kapu & Richards, 2016; McCabe, 2014; No & Kim, 2015; Reitsamer & Brunner-Sperdin, 2017; Soliman, 2011). Responses were recorded on a five-point Likert scale of influence, where 1 = 'Not at all influential' and 5 = 'Extremely influential'.
- Section F measured the travel intentions of domestic tourists. Four items related to the intention to travel domestically within South Africa in the near future were based on aspects adapted from previous empirical studies (see Kim *et al*., 2019; Law, 2006; Olya & Al-ansi, 2018; Wang, 2017). Responses were recorded on a five-point Likert scale of likelihood, where 1 = 'Extremely unlikely' and 5 = 'Extremely likely'.

The international demand questionnaire consisted of the following sections,

- Similar to Section A of the domestic tourism measuring instrument, Section A of the international demand survey solicited socio-demographic information, including

the respondent's age range, the gender they identify with, educational level, marital status, travel companionship, and their region of residence. Respondents were asked whether they have travelled for tourism purposes before and which channels they utilise to gather information about tourism destinations.

- Section B solicited data that explores international demand. This data included five items supported by the literature to measure the push travel motives, as well as the international Brand Equity (IBE) which comprised of four items adapted from the literature respectively on the awareness, association and interest (Aziz & Yasin, 2010; Basaran, 2016; Martín, Herrero & Salmones, 2019) of tourists with regards to South African tourism. Responses were recorded on a five-point Likert scale of agreement, where 1 = 'Strongly disagree' and 5 = 'Strongly agree'.
- Section C MACRO I factors which are more general global factors. First Section C measured tourists' perceived CI of South Africa. The study adapted Buhmann's (2016) multi-dimensional CI measurement construct. A total of 12 statements were adapted to measure South Africa's CI based on two dimensions: Functional and Normative CI. Responses were recorded on a five-point Likert scale of agreement, where 1 = 'Strongly disagree' and 5 = 'Strongly agree'. Section C also measured the influence of South Africa's PB on tourists' decision-making when considering South Africa as a tourism destination. A total of 16 statements were adapted from the contemporary literature (see Adams, Snyder, Crooks & Johnston, 2015; Filistanova, 2017; Lee, 2012; Lee, Han & Lockyer, 2013; Lunt, Smith, Exworthy, Green, Horsefall & Mannion, 2012; Musuva, 2015; Saiprasert, 2011; Singh, 2013; Verissimo, 2012). Responses were recorded on a five-point Likert scale of influence, where 1 = 'Extremely negative influence' and 5 = 'Extremely positive influence'. Section C then measured international tourism risk perception based on 16 items associated with perceived psychological, social, physical and financial risk, respectively (see Adam, 2015; Deng & Ritchie, 2018; Fuchs & Reichel, 2006; Fuchs & Reichel, 2011; Olya & Al-ansi, 2018; Wang, 2017). Responses were recorded on a five-point Likert scale of agreement, where 1 = 'Strongly disagree' and 5 = 'Strongly agree'. Section C also measured the perceived risk of international travel and tourism activity in South Africa. Perceived safety was measured based on nine statements adapted from the extent of the literature (see Adam, 2015; Reisinger &

Mavondo, 2005; Rittichainuwat & Chakraborty, 2012). Responses were recorded on a five-point Likert scale of safety, where 1 = 'Very risky' and 5 = 'Very safe'.

- Section D measured MESO factors that are country-specific and more localised factors. Section D first measured pull travel motives of tourists. Ten statements measured South Africa's destination attributes. Items were based on aspects adapted from previous empirical studies (see Filistanova, 2017; Gautam, 2018; Mapingure, du Plessis & Saayman, 2019; Saiprasert, 2011; Seyidov & Adomaitienė, 2016). Responses were recorded on a five-point Likert scale of likelihood, where 1 = 'Extremely unlikely' and 5 = 'Extremely likely'. Section D also measured the perceived effectiveness of pharmaceutical and non-pharmaceutical interventions. Five items were drawn from previous studies (Liu, Schroeder, Pennington-Gray & Farajat, 2016), to establish the perceived effectiveness of interventions. Responses were recorded on a five-point Likert scale of effectiveness, where 1 = ' Very ineffective' and 5 = 'Very effective'.
- Section E measured MACRO II factors which are larger scale country-specific factors within the control of the destination. Section E measured the influence of South Africa's destination media profile. 12 statements associated with the influence of South Africa's international tourism's media and marketing profile - which is where potential international tourists derive the information which they utilise as heuristic cues in their decision-making were included (Fuchs & Reichel, 2011). Items were measured based on aspects adapted from previous empirical studies (see Adeola & Evans, 2019; Gong & Tung, 2017; Huong & Lee, 2017; Hyun, 2006; Kapu & Richards, 2016; McCabe, 2014; No & Kim, 2015; Reitsamer & Brunner-Sperdin, 2017; Soliman, 2011). Responses were recorded on a five-point Likert scale of influence, where 1 = 'Not at all influential' and 5 = 'Extremely influential'.
- Section F measured the travel intentions of tourists. Four items were included, related to the intention to travel internationally to South Africa in the near future based on previous empirical studies (see Kim *et al*., 2019; Law, 2006; Olya & Al-ansi, 2018; Wang, 2017). Responses were recorded on a five-point Likert scale of likelihood, where 1 = 'Extremely unlikely' and 5 = 'Extremely likely'.

Research Ethics

The research was conducted with the strictest ethical considerations in mind. The recommendations of the Belmont Report (1979), Nayak and Narayan (2019), and the research ethics code of North-West University were applied for the duration of the proposed research. Ethical clearance for the study was obtained from the North-West University to ensure the research's integrity, quality, and validity. Ethical considerations included:

- Acquiring informed and voluntary consent from participants of the study (See Appendix A),
- Guaranteed confidentiality and anonymity of respondents with no personal, identification or sensitive information being solicited,
- Ensuring non-discrimination against respondents based on their racial orientation, religious or political beliefs or gender.
- Adherence to the prescripts of the POPIA act as outlined by NWU policy.
- Generally, the vulnerable were not targeted with this study.

The ethics application followed a two-step approach where ethical clearance was firstly sought for the qualitative research and thereafter the quantitative research.
The Ethics number is: NWU-00565-22-A4.

7.3.3 Quantitative Research: Empirical data collection

A domestic online survey of a socio-demographically representative sample of South Africans was done to generate the data required for the study, based on a database of pre-recruited South African consumers. Thus, potential tourists, those that have travelled and those that might travel in the next few years could participate in this study. The database and the survey were administered, respectively, by iFeedback, an accredited South African research service provider. Gatekeeper access has been granted (see attached letter). The questionnaire was self-administered and conducted remotely. Respondents were invited to participate in the survey by iFeedback and voluntarily opted to participate. A consent letter preceded the survey, informed respondents of the purpose of the study, and informed them of their voluntary consent. Responses were automatically catalogued for this specific study by the survey software.

An international online survey was conducted to generate the data required for the international demand study. The survey of individuals as potential international tourists was conducted on the Amazon Mechanical Turk (MTurk) platform. MTurk is an increasingly popular crowdsourcing-based online research platform (Aguinis, Villamor & Ramani, 2020; Cobanoglu, Cavusoglu, & Turktarhan, 2021). Crowdsourcing in research refers to,

"[…] the collection of information, opinions, or other types of input from a large number of people, typically via the internet, and which may or may not receive (financial) compensation...Within the behavioural science realm, crowdsourcing is… the use of internet services for hosting research activities and for creating opportunities for a large population of participants." (Cobanoglu et al., 2021:92).

Data was generated using a web-based self-administered questionnaire developed in QuestionPro and administered remotely via MTurk. Automatic collection and collation of survey responses were facilitated in QuestionPro. In line with the service requirements, potential respondents were invited to participate in the survey via MTurk and they received a small *pay-per-task model* stipend of $2 for their voluntary participation in the survey (see Stritch, Pedersen, & Taggart, 2017:493). Prior tourism research studies (see Lu & Atadil, 2021; Pereira, Anjos, Añaña & Weismayer, 2021; Taff, Benfield, Miller, D'Antonio & Schwartz, 2019; Tasci, 2017; Zhong, Busser, Shapoval & Murphy, 2021) have to date successfully utilised MTurk-based samples. Respondents were provided with information about the study and the survey via the consent letter and were provided with a link to the online survey questionnaire. Best practices recommended by Cobanoglu et al. (2021) and Aguinis et al. (2020) for utilising MTurk to ensure the survey data's validity and reliability, such as data cleaning, timed responses, the use of *Captcha verification*, and the calculation of active response rate was followed.

7.3.4 Quantitative Research: Data analysis

The data generated by the survey was collated using Microsoft Excel® software and analysed using the IBM Statistical Package for Social Sciences (SPSS) and AMOS software. Descriptive statistical analysis was employed to summarise all the data generated by the survey. Measures were in the form of central tendency - mean, mode, frequency and measures of variance – range and standard deviation. Statistical

tests to analyse the potential relationships between the independent and dependent variables were also employed.

The following statistical analyses were used:

a) Exploratory Factor Analysis (EFA) was applied to establish the constructs that constitute the independent variable(s) and the dependent variable(s). Eigenvalues as point estimates were assessed to determine which and how many constructs to retain after EFA using Principle Component's Analysis (PCA).
b) Confirmatory Factor Analysis (CFA) to validate the underlying measurement constructs established by the PCA/EFA.
c) Cronbach's alpha coefficients were calculated to determine the reliability and inter-item consistency of the measuring instruments for the proposed study.
d) Pearson product-movement correlation coefficients were calculated to determine if there are relationships between the factors loading due to the EFA.
e) Multiple and Linear regressions were utilised to measure whether there are relationships between CI, PB, and international tourists' travel intentions.
f) Mediation analyses (IBM PROCESS Macro) were employed to establish any mediation effect in the primary relationships established by the study.
g) ANOVA's in conjunction with Scheffe's tests and Cohen D's were conducted to determine whether practically significant differences in means exist in the relationship between the demographic profile of respondents and the variable(s) identified.

8. Results

8.1 Desktop review results

The following results were evident from the desktop review

8.1.1 South African Tourism Transition from Response to Resilience

The exposure and susceptibility of the global tourism sector to external shocks and the resultant crises, provides impetus for research into the development of a *resilience model* to sustainably recover and grow demand for South Africa's tourism products. Tourism resilience is a critical antecedent to tourism recovery (World Bank, 2020b). The transition from *resilience* (preparedness and response action) to *recovery* is predicated on the South African government's ability to synchronise contemporary

domestic and international tourism demand with South Africa's tourism supply as a strategic response to the effects of the COVID-19 pandemic. However, there is currently, a discernible need for research that will provide South African tourism practitioners and policy-makers with critical insights into demand (effective forecasting, changing travel behaviour and preferences – national and international perspectives) and supply (fluid risk strategy; adapting and adhering to tourist needs – SMME and macro perspectives). While, South Africa's Tourism Sector Recovery Plan (TSRP, 2020, 2021) outlines the impact of the COVID-19 pandemic and seeks to mitigate the pandemic's effects on the tourism sector, going forward the UNCTAD (2021) identifies four factors that may inhibit global tourism recovery, and invariably any tourism destination's resilience and post-pandemic recovery. These factors include: (1) the ongoing travel restrictions; (2) delayed containment of the corona virus; (3) a poor global economic environment; and (4) low traveller confidence.

The sustainable recovery, development and growth of South African tourism in the era of COVDI-19 are dependent on optimising domestic tourism (to both kick-starting the tourism sector and as a stop-gap measure for the current deficiencies in international tourism), and responsibly re-opening South Africa to international tourism. Moreover, as South Africa's domestic and international tourism supply sustainably meet evolving tourist demand preferences, the resilience of the sector must account for the following structural adjustments as recommended by the World Bank (2020a):

- Increasing focus on health and hygiene standards in travel and tourism;
- Understanding the contemporary shift in tourism demand (including the evolving role and increasing importance of domestic and regional tourism);
- Interpreting the changing business models due to tourism enterprise consolidation and corporate restructuring in response to the economic pressure of the pandemic;
- Developing and harnessing competitive and comparative advantages associated with the innovation and technology-based solutions impacting tourism supply; and
- Mobilising public resources [investments] in destinations to re-position them for a more sustainable and resilient tourism industry post-COVID-19.

These considerations will form the basis of the tourism resilience model for South Africa to facilitate the processes summarised in Table 1 (World Bank, 2020b:3):

Table 1: Adapted outcomes of tourism resilience

Minimise losses and disruptions – of physical and human assets and key business operations, as well as shutdown times and associated losses to both organizations and individuals. Actions taken before, during, and immediately after disasters/crises are critical. ***Continue or quickly resume operations*** – during and immediately after disasters/crises. This can be enabled through preparatory business continuity and disaster/crises response plans which guide post-disaster actions. ***Sustain and increase competitiveness*** – following disasters/crises through response and recovery actions. After large-scale disasters/crises industries need to remain in business and recover quickly within contracted markets or altered economic landscapes. Post-disaster/crises competitiveness may require innovations to regain market share and consumer confidence, and build back better, more resilient businesses, rather than returning to business as usual.

8.1.1.1 A demand-side perspective to resilience

Tourists are the unequivocal life-blood of the tourism ecosystem. Hence, the re-ignition of tourism demand is critical to the resilience of tourism and precedes any and all strategic efforts for tourism recovery. The onset of the COVID-19 pandemic also signalled the evolution of tourist behaviour - as tourists adapt to 'the new normal', suggesting that tourism practitioners and enterprises also need to be cognisant of the changes in tourist behaviour, as well as be proactive and reflexive to meet the evolving contemporary tourist demands and preferences effectively with suitable supply. Hence, in light of the on-going COVID-19 pandemic, it is paramount to acknowledge that while tourists may have strong personal motivation for engaging in travel and tourism activity, the on-going pandemic may inhibit their desire to for tourism (Gobinda & Swati, 2021). This inhibition is subject to the multi-dimensional nature and pervasiveness of the impact of the COVID-19 pandemic across the spectrum of the tourism value-chain, whereby moratoriums and non-pharmaceutical interventions such as limitations on carrying capacity (air and land transport, restaurants, leisure

facilities), the stringent regulation of domestic and international travel (including distances travelled), and limited access to public spaces and resources, influence both the ability and willingness of tourists to travel for tourism (Hao, Bai & Sun, 2021). Furthermore, there is growing empirical evidence that illustrates the adverse effects that health-related crises have on domestic and international tourism demand (Global Rescue & World Travel and Tourism Council, 2019).

Contemporary crisis's that have negatively impacted tourism demand include the 2001 foot and mouth outbreak in the United Kingdom, the 2003 SARS outbreak, 2009 H1N1, and 2014 Ebola outbreaks, respectively (Gobinda & Swati, 2021; Karabulut, Bilgin, Demir & Doker, 2021; Mayer, Bichler, Pikkemaat & Peters, 2021). To this end, emerging COVID-19-related tourism studies (Abraham, Bremser, Carreno, Crowley-Cyr & Moreno, 2020; Kock, Nørfelt, Josiassen, Assaf & Tsionas, 2020; Li, Nguyen & Coca-Stefaniak, 2020) indicate a discernible and generally adverse impact of the pandemic on the psyche of tourists. Hence, the growing body of knowledge in tourism research suggests that due to the severity and duration of the COVID-19 pandemic, primarily perceived health-related physical risk associated with COVID-19 has induced a paradigm shift in tourist demand due to behavioural antecedents such as perceived infection risk, safety concerns, risk averseness, anxiety and hesitation and decision-making (Matiza, 2020). Moreover, evidence from tourism in China (Yang et al., 2021), suggests that while some tourism destinations have hastened to open-up the tourism sector with the aim of striking a balance between pandemic prevention and economic stability, the necessary pandemic control measures are adversely influencing the tourism experience. Yang et al. (2021) observe a generally poor affective tourist experience, indicating the need to not only focus on recovering tourism demand, but also reflecting on the tourism experience under the 'new normal'. As a result, tourism research (Matiza & Slabbert, 2021; Yang et al., 2021), as well as the TSRP (2020:22) acknowledge the following demand-side factors as key to the resilience of tourism:

- Demand for unique, sustainable and exclusive experiences such as open spaces or rural holidays and outdoor activities (to avoid crowding and 'busy' destinations)
- Due to the volatility of the contemporary tourism market international leisure tourists may require refund guarantees

- Tourists may increasingly expect added flexibility to change dates and/or destinations
- Preference for private transport modes (self-drive) as opposed to public (air travel/train/bus) where possible
- Uptake of technology to meet tourist need for contact-less services
- Longer stay packages due to remote work flexibility allowing for work-integrated holidays
- Tourists may have heightened concerns for personal and environmental safety, as well as destination sustainability.

8.1.1.1.1 Domestic tourism

At roughly six times the size of the international tourism market [trips and travel spending], domestic tourism has equally been adversely affected by the COVID-19 pandemic via localised non-pharmaceutical interventions such as moratoriums on travel and social distancing mandates (World Bank, 2020b). However, due to the proliferation of vaccines (Yang et al., 2021) in developed countries and parts of Asia, a significant proportion of major tourism destination countries are pivoting from international tourism towards domestic tourism as a strategy to stimulate tourism demand, and the responsible re-opening of tourism and the overall resuscitation of the sector (Organisation for Economic Cooperation and Development, OECD - 2020). Relatedly, the focus on domestic tourism for the recovery of the global tourism sector may primarily be based on the notion that tourists are susceptible to the 'home-is-safer-than-abroad bias' (Wolff & Larsen, 2016; Wolff, Larsena & Øgaard, 2019) whereby, tourists perceive domestic travel and tourism to be *safer* than international tourism. As a result, the propensity for tourists to engage in tourism activity in the face of risk associated with crises such as terrorism, natural disasters and more pertinently, health pandemics is more plausible when considering domestic tourism (Adeloye, Carr & Insch, 2019; Wolff *et al*., 2019).

South Africa will have to rely on domestic tourism for the foreseeable future because some of South Africa's top tourism source markets [France, Germany, Italy, Spain, the United States and, the United Kingdom] were in the top 10 of the most severely impacted (infection rates) countries in the world and have instituted some of the most

stringent international travel restrictions (World Bank, 2020a). Typically, due to the impact of the pandemic on both immigration and inter-continental international air travel, in 2020 the majority (74.8%) of tourist arrivals to South Africa were from the SADC region, compared to 23.6% from the traditional 'overseas' markets including the USA, the United Kingdom, the Netherlands and France (Statistics South Africa, 2021). In line with the TSRP (2020:22) the reliance model for domestic tourism must consider strategic interventions such as, (1) the implementation of world-class health and safety norms and standards across the tourism value chain to enable safe travel and tourism which rebuilds traveller confidence; and (2) the initiation of targeted social marketing- and crisis communication-oriented initiatives and campaigns to stimulate domestic demand. With this in mind, the World Bank (2020a) advises that destination countries with vibrant domestic tourism markets and those that can establish regional 'travel bubbles' are expected to recover faster than markets dependant of international source markets such as China, the US and Europe. As a result, the World Bank (2020a) views demand-side resilience to be predicated on factors summarised in Table 2:

Table 2: Demand-oriented resilience determinant factors

- The size and value of the domestic tourism market as domestic tourists are regarded as likely to travel sooner than international visitors. Countries with a higher value domestic tourism market are likely to recover their tourism sectors faster.

- The size of the intra-regional markets may indicate the potential for regional recovery between closely-related safe-zones or regional 'travel bubbles' (e.g. 'Tasman bubble' between Australia and New Zealand).

- The number of COVID-19 cases in the country and the number in neighbouring countries will impact the length of lockdowns and travel restrictions and the ability to get domestic and intra-regional travel restarted.

8.1.1.1.2 International tourism

It is anticipated that travel and tourism will rebound fastest within Europe and North America, buoyed by a higher pervasiveness of vaccinations (UNCTAD, 2021). This may indicate a competitiveness challenge for African tourism in international tourism, particularly if the African region is lagging behind in vaccinating its population, the continent will remain significantly less competitive in the new vaccine-driven international tourism dispensation. Within the context of international tourism demand, the critical aspects are the profiling and evaluation of international travel behaviour, risk perceptions, the willingness and ability of tourists to travel, inhibitors and constraints to travel and the travel motives of tourists. More-over in light of the COVID-19 pandemic, gaps in knowledge relating to evolving international tourist perceptions of safety and product preferences require urgent attention (Matiza, 2020; Matiza & Slabbert, 2021). In line with the TSRP (2021) tourism resilience for international tourism must consider the following strategic interventions:

- The implementation of health and safety protocols in line with international norms and standards for safe operations across the South African tourism value chain to enable safe travel and rebuild traveller confidence in tourism to the country
- The development and execution of an innovative global social marketing-oriented and crisis communication directed marketing programme to reignite international tourism demand for South Africa's tourism products
- A focus on the regional integration of tourism as a phased approach to re-opening tourism to international travel and harnessing economies of scale in tourism

8.1.1.1.3 Determinants of demand

Within the BBB approach, the data inquiry for the tourism demand will mostly be based on well-acknowledged determinants of tourism within the tourism economics literature. Each of these determinants is provided in detail below.

Income - Income in the country of tourists' origin plays an essential role when it comes to traveling. It is one of the most frequently used variables in tourism studies. Even during the last decade, income has continued to be chosen by many researchers as a significant determinant of tourism demand.

Walsh (19965) argues that, ceteris paribus, the larger the real per capita income of a country, the more likely that its citizens will be able to afford to purchase travel services abroad. A growing trend in real income provides consumers with additional spending or purchasing power. This variable measures how the travelling habits of the people in a specific country of origin respond to their wealth (Eilat & Einav, 2003).

Price - comes a close second to income when choosing possible significant determinants of tourism demand. Also known as tourism or relative prices, they are difficult to measure precisely because of the wide range of products that tourists are likely to pay for while traveling. Additionally, tourism prices consist of two main components – transportation costs and the cost of living at the destination (Martin and Witt, 1987). The amount of money spent on local travel counts as a part of the cost of living at the destination.

Exchange rate is a vital determinant and influences the demand to a great level. While making decisions on their travel destination, tourists are much more aware of the changes in exchange rates than of changes in relative prices. Tourists are in habit of travelling abroad annually and mainly during summer. Everything they spend abroad is from their annual budget. Both relative exchange rates and relative prices of travel services influence the amount of their spending and are therefore taken into account when deciding whether to take a trip abroad or choose the budget-friendly option and explore their homeland. Due to the fact that exchange rates are published daily (in newspapers, evening news etc.), the tourists have a much more precise knowledge of the values of exchange rates than they have of the prices in their planned destination while making the decision. The information on price changes is generally not known in advance, so the tourists' only indicator of the destination's price level is what they remember it to be at the last time they visited that particular destination.

Exchange rates vary a lot over time and are therefore constantly affecting the number of tourists visiting a certain country. The fluctuation in exchange rates can affect the tourists' decisions in several different ways. The change can be either favourable or unfavourable. Gerakis (1966) identified the impacts caused by a change in exchange rates in favour of the tourists and described that it makes them spend more on things that they would purchase anyway, buy additional goods and moreover such a change

attracts new tourists and cross-border shoppers. Reverse effects resulting from an unfavourable change in exchange rates were depicted by The Economist Intelligence Unit (1975), which identified that people tend to travel less abroad, change their final destination, spend less on destination's goods and services and/or stay for a shorter period of time. Furthermore, they postpone their trip, use a different type of transport and those who travel for business begin to spend less. Similarly, as in cases of income and prices, many empirical studies have employed various definitions of exchange rate variable.

As recognized by Crouch (1993), there are three types of exchange rate definitions used in tourism demand literature:

a) Units of the origin country's currency per unit of the destination currency.

b) Units of the origin country's currency per weighted unit of currencies in foreign destinations.

c) Weighted units of alternative destinations' currencies per unit of destination currency.

The use of each definition depends on whether the researcher is interested in identifying the effect of exchange rates on tourism flows between pairs of countries or tourism departures to a larger number of either an alternative or all countries. Mainly definitions a) and b) can be found across the tourism demand studies.

The interpretation of changes in relations given by these two definitions is as follows. If the ratio a) increases, it is due to the origin country's currency devaluation with respect to the destination's currency. It means that the destination's goods and services become more expensive for tourists resulting in a decline in tourism demand. Crouch (1993) adds that a change in this ratio can also occur if at the time of devaluation of the origin's currency with respect to other currencies there is a smaller reduction in the value of the destination's currency. He further explains that the reason behind this kind of change in ratio a) could have a positive effect on tourism demand. The same reasoning can be applied to the case of multiple destinations in b).

Trade Openness - Including the trade openness variable, also known as the volume of trade, in tourism demand analysis could be particularly useful when a destination's economy is greatly driven by international business. In such destinations, tourist

arrivals for business purposes make up a fair share of total arrivals. According to Abbas and Ibrahim (2011) Egypt can be viewed as a country that satisfies the previous assumption. They recognized that the volume of trade has had a significant and positive effect on the international tourism flows to Egypt during the period 1990-2008. Trade openness was measured as the sum of export and import volume between Egypt and the country of tourism's origin divided by the sum of Egypt's GDP and GDP of countries of tourism's origin.

Population Size and Population Segment - It seems reasonable to include this variable among the determinants of tourism demand. We can assume that the larger the population of countries of tourism origin, the more tourists will these countries generate.

The idea of investigating the influence of different population segments on tourism demand rather than focusing on the effects of total population arose quite recently. Different age groups' consumption patterns vary a lot. Over the past decade, the proportion of older people in developed countries has been steadily rising at the expense of the proportion of younger people (Alvarado and Creedy, 1998). This trend is known as population aging. It can be measured by the share of citizens who are above the retirement age. Their share has been recently rising because life expectancy has been increasing. Since the baby boom after the Second World War fertility rates have dropped significantly and the fact that the babies born then are now near or have already entered retirement certainly adds to the recent population aging trend as well. Retirement represents an important milestone and marks a start of a new and exciting chapter of life. Generally, retirees have more time and money to spend on travelling, which can considerably boost the demand for tourism. Moscardo (2006) calls this type of senior travel a `'third-age tourism" and adds that there is a rising number of companies that specialize in providing tourism services, particularly for seniors.

Marketing - In order to increase awareness of a particular country as an attractive tourism destination, tourist organizations around the world spend a lot of money on various promotional activities. Different nationalities and cultures are likely to respond differently to marketing and different destinations vary in their ability to use marketing

effectively, thus it is rather difficult to model the impact of destination promotion correctly.

Country Attractiveness - Tastes vary from person to person. Moreover, they change and develop over our Life. Age is just one among other various socio-economic factors that influence travellers' tastes. Sex, marital status and level of education also result in different tastes across population. They can further change as a consequence of rising living standards, advertising or innovation (Song et al., 2009). Due to the fact that there are so many influencing factors, it is very difficult to measure a variable to indicate tastes.

Another way to capture destination preference or popularity of a particular destination over time is by inclusion of a time trend.

Repeated Visits - People generally don't like taking risks, it could be said that they are risk averse. Although this term is mostly used in relation to behaviour of investors, it aptly describes the reluctance to take risks by tourists, too. If they enjoyed the stay in a certain destination, it is highly likely that they will return to the same place next time as well. Traveling to a different country they are not familiar with would represent a certain level of uncertainty (Song et al., 2009).

Furthermore, they tell their friends and family about the lovely time they had and what they liked about the destination in particular. After that the information spreads more and more. This is known as so called Word-of-Mouth (WOM) effect. Recent evolution of technology, more specifically in digital social networking, has encouraged the development of a digital version of WOM (eWOM). Increasing number of travellers look on online tourism review sites for details on accommodation at a particular destination in order to plan their travel (Sigala et al., 2001). Additionally, results of a survey conducted as a part of the Pew Internet and American Life Project (2006) confirm that the most searched topics on the internet are tourism related.

Some of the most popular travel websites include TripAdvisor and TravelPod. TripAdvisor calls itself the world's largest travel site. It is a place where travellers share insights about accommodation, attractions or restaurants at a destination. It currently

contains more than 100 million reviews. TravelPod allows its users to create a blog containing photos and stories about their travel experiences.

Both WOM and eWOM can be viewed as a form of marketing. They have the same effects as promotional activities of national tourist organizations and attract more tourists to a destination. In addition, they are almost always free of charge (Sigala et al., 2001). Numerous studies have been conducted to decide which of these forms of marketing is more effective. Kardon (2007) concludes that tourists are more influenced by WOM than advertising or promotion by marketing departments.

The chance of repeated visits, i.e. habit persistence of tourists, is often proxied by the value of the dependent variable lagged by one time period. If this variable is included in a model of tourism demand it is expected to have a positive sign. The lagged value accounts not only for habit persistence but also for possible supply constraints in the destinations. Among these constraints are, for example, insufficient hotel and passenger transportation capacity or shortages of staff (Dwyer et al. 2006).

An outbreak of a disease - Salleh et al. (2007) described and assessed the impacts of SARS (which stands for Severe Acute Respiratory Syndrome) on international tourist arrivals to Malaysia. They investigated the effect of this infectious disease by including a dummy variable for the SARS outbreak in 2003 and estimated it had a negative effect on tourism owes from all of the seven Asian origin countries that were included in their analysis.

Another one-off event that has been often added in a form of a dummy variable to the demand models is the year of the terrorist attack. The tourism industry, unfortunately, attracts the attention of international terrorist groups, because it provides them with a wide variety of ways how to gain the attention of global media. Military bases, government institutions, transportation networks, and crowded places can all become targets.

Terrorist events are responsible for an abrupt change in tourists' decision-making and negatively impact upon global tourism demand. Tourists fear for their safety, and moreover, they are discouraged from traveling by heightened security checks resulting

in delays in transport systems. However, the apprehension towards traveling doesn't last long. The impact of a terrorist event on tourism is apparent particularly in the short run and has only a limited effect in the long run (Middleton et al., 2001).

Seasonality - Specific time of the year, like a season or a period of school holidays, can have a significant effect on tourism demand. Typically, if using monthly data, twelve seasonal dummy variables are included in the model and similarly four seasonal dummy variables are incorporated regarding the quarterly data (Shareef et al., 2008).

8.1.1.2 A supply-side perspective to resilience

The post-crisis sustainable growth and development of any tourism industry are dependent on attracting optimal international tourist arrivals and optimising domestic tourism and thereby ensure resilience. However, this growth and development largely depends on the resilience of the supply-side of South African tourism. The impact of overt government-led non-pharmaceutical interventions [lockdowns and travel bans; quarantines and social distancing protocols; mandatory mask-wearing and sanitation measures; digitalisation of travel and tourism services] on domestic and international tourism from a supply perspective (Sharma, Thomas & Paul, 2021), will be critical to tourism resilience in South Africa and can be considered as step 1 in the recovery process. To this end, in light of the pandemic tourism research points to the need for a significant and possibly radical paradigm shift in the delivery (supply) of tourism products (Gössling, Scott & Hall, 2020). Empirical evidence (see Department of Tourism, Tourism Business Council of South Africa and International Finance Corporation, 2020a, 2002b, 2020c; TSRP, 2020) on the impact of the pandemic and crisis-induced remedial measures on tourism supply in South Africa advises the need for sector-wide support and the urgency of sustainably re-opening the sector. Moreover, the onset of the COVID-19 pandemic also signalled the evolution of tourist behaviour - as tourists adapt to 'the new normal', suggesting that tourism practitioners and enterprises also need to be cognisant of the changes in tourist behaviour, as well as be proactive and reflexive to meet the evolving contemporary tourist demands and preferences effectively with suitable supply.

Critical to the growth and development of the tourism supply-side in South Africa are aspects of risk readiness, crises recovery and sustainable tourism resilience in the medium-to-long term. In line with the observations of Sharma et al. (2021) and the TSRP (2020:22) resilience modelling for South African tourism must consider the following strategic interventions for the supply-side:

- Strengthening of tourism supply in South Africa through resource mobilisation and investment facilitation [possibly beyond current efforts]
- Fiscal support for the protection of core tourism infrastructure and assets that will be critical to the competitiveness of South Africa in the post-COVID pandemic era (see Sharma et al., 2021:7)
- Consistent and reflexive review of tourism policy in the short-to-medium term to provide enhanced support for sector recovery, growth and development
- The increasing importance of public-private partnerships and cooperative agreements between both the South African government and the private sector, as well as the South African government, private tourism sector and international partner organisations, respectively
- The automation of tourism services as a panacea to social contact in tourism service provision.

The supply side of tourism thus represents the development and provision of products and services that are aimed at meeting the needs (i.e. the demands of tourists) of tourists within a market. A relationship, therefore, exists between the demand side of tourism and the nature of product development with a certain geographic setting; however, destination marketers and managers have developed a capacity to match the unique supply-side factors of a destination with demand-side niche markets. Tourism supply has to do with the provision of the key elements of the tourism industry by the host governments or destinations. Such provision should extend to maintenance, promotion and management of the tourism facilities and resources. Both natural and man-made resources are required for them to exist a proper tourism supply side. Tourism suppliers can therefore be classified under the following categories: Transport, Hospitality, Attractions and Products. The supply side of tourism is therefore determined by several factors such as natural resources, environmental factors such as climate and weather, built environment, supporting

services such as accommodation, transportation, attractions, tourism activities, food and beverages, and events and conferences. The components of tourism supply are graphically shown in Figure 1.

It is evident from Figure 1 that the supply of tourism is composed of a number of actors such as accommodation, transportation associated services and tourism products. Moreover, as indicated in Figure 1, accommodation is a central component of tourism supply, it carries within itself a whole range of hospitality items such as food, entertainment, relaxation, and rest, therefore accommodation is the core of tourism supply in any geographic setting. The supply of tourism is therefore governed by the following factors.

Figure 1: Components of tourism supply

- ***Natural and environmental resources***

Natural resources are referred to the essence of an environment's core resources that comprise available species on floral and faunal (Crouch & Ritchie, 1999). Natural resources play a vital role as one of the tourists' main attractions (Hassan, 2010) and competitive advantages of tourism destinations (Ritchie & Crouch, 2000; Jaafar & Maideen, 2012; Law & Lo, 2016). Thus, it is sensible for the conservation of natural resources by tourism stakeholders without causing unnecessary impacts to the environment (MacDonald and Jolliffe, 2003; Scales, 2014; Lo et al., 2017) as natural resources dimension is a determinant for tourism destination competitiveness (Ritchie and Crouch, 1993). Tourism supply in this regard embraces elements like the physiographic of the area, landforms, flora, fauna, water bodies, air quality and similar

natural phenomena. In essence, the availability of such resources is of paramount importance to the success and continuity of tourism as a spatial industry.

- ***Cultural resources***

Saarinen and Rogerson (2015) argue that the existence of cultural tourism is a result of the presence of cultural resources within a given destination. Cultural tourism is therefore a subset of tourism concerned with a country or region's culture, specifically the lifestyle of the people in those geographical areas, the history of those peoples, their art, architecture, religion(s), and other elements that helped shape their way of life. Cultural tourism includes tourism in urban areas, particularly historic or large cities and their cultural facilities such as museums and theatres. It can also include tourism in rural areas showcasing the traditions of indigenous cultural communities (i.e. festivals, rituals), and their values and lifestyle (Nelson, 2013:42). Cultural tourism can be generally seen as a sociocultural relationship between people which is promoted, moderated and mediated by a range of various actors including, planners, politicians, researchers, marketing professionals, travel agencies and so on. Cultural tourism can be regarded as a meeting between social systems and cultures that will produce changes in both of them (Smith, 1992). As a social practice, cultural tourism reconstructs or constructs identities (e.g. nationalism, social identities, and transnationalism) and will eventually contribute to globalization and framing a globalized world. Therefore, cultural tourism depends on the following categories of cultural resources:

- Contemporary culture
- Built or historical heritage
- Cultural heritage
- Art

Nelson (2013:60) argued that cultural tourism is based on human attractions; it pertains to the unique cultural patterns that have evolved in a specific place over time and which serve a purpose for that group rather than attracting tourists. Cultural tourism may include patterns of lifestyle, cuisine, clothing, art, music, folklore, religious practice, and other aspects that make a place distinct and unique (Nelson, 2013:60). Cultural tourism can be further divided into the following subsets:

- Heritage tourism (Natural and cultural heritage - connected to nature-based or ecotourism);
- Cultural thematic routes (gastronomic, spiritual, industrial etc.)
- Cultural city tourism, cultural tours
- Traditions, ethnic tourism
- Event and festival tourism
- Religious tourism, pilgrimage routes
- Creative tourism (cinema, the press, multimedia, etc.)

The typical cultural tourists are people aged 45 – 60. Most of them are people with higher incomes and education and they are willing to spend more money on their trips. They are sophisticated people who look for new experiences and new destinations. It is assumed that the number of people interested in cultural tourism will grow with how baby-boom generation matures.

- ***Built environment***

The built environment represents the infrastructure of a certain geographic setting. Infrastructure includes all underground and surface development constructions such as water supply systems, sewage disposal systems, power lines, roads, communication networks and many other commercial and recreational facilities. Particularly needed by tourism is a superstructure to include facilities constructed primarily to support visitation and visitor activities. Primary examples are airports, parking lots, parks, hotels, and other places of entertainment. The tourism phenomenon therefore relies heavily on public utilities and infrastructural support. Tourism planning and development would not be possible without roads, airports, harbours, electricity, sewage, and potable water. The infrastructural dimension is thus a necessary element for tourism development and the above factors are all basic elements for attracting visitors to a destination. Furthermore, the UNWTO (2019) asserted that the development of tourism especially in rural locations requires infrastructure capable of serving the host population and the temporary population that arises at the location for business or leisure purpose.

- ***Spirit of hospitality***

The hospitality industry is the tourism's most important sector, as depicted in Figure 1, the accommodation sector is in the centre of the tourism supply system. As a highly service-based tourism sector, the hospitality sector involves high levels of interaction between the guests and the host communities. The hospitality sector does not only encompass accommodation services but also dining, restaurants and gaming services at the destination.

According to McKay and Subramoney (2017), Hospitality is the act of kindness in welcoming and looking after the basic needs of customers, mainly in relation to food, drink, and accommodation. A contemporary explanation of Hospitality refers to the relationship process between a customer and a host. The hospitality sector is therefore critical in providing psychological comfort for the guests, which ultimately means that the interaction between tourists and host community at the level of hospitality is important for tourist satisfaction. The nature and spirit of hospitality within a given is an important factor of tourism destination growth and development, it is predetermined by a number of factors such a basic resources availability at the destination, Nature of tourism growth, local community involvement in tourism planning and overall nature of interaction between the local community and tourists, as such it can be concluded that the spirit of hospitality at a tourism destination is an a concept attributed only to the tourism establishment such as accommodation but it is a destination concept.

- ***Operating Sectors***

The tourism product can be defined as the amalgamation of different parts into one, they are therefore complex in nature (Chang & Katrichis, 2016). Comprising of numerous concepts or sectors as depicted in Figure 1. A total tourism product is therefore comprised of all sectors that are needed to satisfy the needs of tourists. The tourism product has been said to consist of five elements which includes (1) the physical destination which is the core of any tourism product and includes attributes of the physical environment; (2) Customer care which views the style and attitude in which products and services are supplied to tourists; (3) Quality of service which refers to the performance levels which are required to meet and satisfy tourists needs; (4) Involvement and Experience which addresses the degree and nature of tourist

involvement in the production and consumption of tourist's products and services; and (5) freedom of choice which clarifies the importance of offering adequate choices to tourists prior to decision making (Eshun, & Tichaawa, 2020). These five elements are critical when planning and rendering tourism services to tourists in the entire supply chain of the tourism sector.

The operating sectors of the tourism industry or product should be present at a tourist destination. A tourist destination being a geographical setting is said to include certain sectors or components which are widely referred to as the six A's of tourism destination. The six A's of tourism includes the following factors as per Rogerson (2019): (1) Attractions – these are important for attracting tourist to a specific tourism destination, they typically include man-made, cultural, natural, purpose-built and events; (2) Accessibility – it addresses the entire transportation system within the destination, comprising terminals, routes, and vehicles; (3) Available Packages – it addresses the importance of pre-arranged packages for tourists by intermediaries and agents; (4) Activities – it encompasses all activities available at the destination that tourists can take part during their stay at the destination; and (5) Ancillary services: it refers to supporting services needed and used by tourists during the visit, it encompasses elements such as telecommunication, hospitals, banks, news services, and postage services.

It is therefore clear that the tourism product is an amalgamation of different products and sector into one complex product which includes amongst others the following sectors:

Accommodation: or lodging facilities and their related services are where tourists stay overnight during their travels, and account for a good portion of the tourists' total expenditure, typically 20 to 30 percent depending on quality of accommodation, destination, and purpose of trip (Rogerson, 2019). There is a wide variety of accommodation that meets the demands of various budgets, including bed and breakfast establishments, youth hostels, campgrounds, and cruise ships. The hotel, the most common type of accommodation, has its own categories extending from luxurious urban or resort properties, to smaller budget-orientated motels or motor lodges (Nwokah, & Adiele, 2018).

Tourism services: are important for enabling the consumption of tourism products and services by tourists. Tourist support services includes aspects such as Roads, Transportation, Communication services and sewage services. It is through tourism support services that destination planners are able to monitor and assess the impacts of tourism on the local environment since tourism support services are shared with the locals (Rehman & Zhang, 2018).

Attractions: at the destination are core assets that a destination requires to competitive within the tourism market. Attractions are important for the general enjoyment and memoralia of tourists. Attractions range from natural, man-made, cultural, historical, heritage, architectural, art, way of life, events, and customs. Destinations unique to a certain geographic setting play a pivotal role in attracting tourists. Attractions within a destination are therefore key elements of destination attractiveness and tourist satisfaction.

Transportation: transportation is integral to the success of all the other components of tourism. There is a direct relationship between advances in transportation and growth in the tourism industry. In particular, the automobile and the jet airplane have made travel accessible to a growing segment of the world's population. As the demand for travel expands, the capacity of transportation modes will be a critical success factor in facilitating or hindering the expansion of the tourism industry.

Food and beverage: are required by tourists and represent another large source of competition for visitor expenditures. Unlike the accommodation sector, a large part of the food and beverage sector is not related to the tourism industry (Nwokah & Adiele, 2018). These include major sectors such as institutional food services in schools, universities, hospitals, and other establishments.

Adventure and recreation: According to the United Nations World Tourism Organization (UNWTO) (2018), adventure tourism is "a trip that includes at least two of the following three elements: physical activity, natural environment, and cultural immersion". Adventure tourism can be "soft" or "hard." Differentiating between the two is somewhat subjective but is loosely based on the level of experience required, the level of fitness required, and the degree to which the participant is exposed to risk

(Gumede, 2019). Adventure and recreation are therefore important for tourists as it offers an opportunity for tourists to interact with the natural environment, and for some tourists, it is a primary motivation for their travel (Gumede, 2019).

Travel trade: Majority of countries in the global community have sought some level of dependence on tourism, it was in 2015 that tourism was included in 3 of 17 universal goals of agenda 2030 (Comerio & Strozzi, 2019). The adoption of tourism as a vehicle for economic growth is due to tourism being a major generator of foreign exchange, creation of employment opportunities, stimulation of trade, investments and entrepreneurship and the provision and growth of infrastructure. The tourism industry is well recognised for its multiplier effect and its nature of being an amalgamation of different products and services. Travel trade is therefore an encompassing term that refers to economic activities within the tourism industry which are propagated by different role players such as travel agencies, tour operators, hoteliers, attractions, and tour wholesalers. The travel sector of the tourism industry, therefore, represents the interests of travel agents, tour operators, tour wholesalers, hoteliers, and attractions who play an important role in creating satisfactory experiences for tourists. Travel trade is greatly composed of agents who play an intermediary role between tourists and service providers, however certain advances in Information Communication Technology have allowed service providers to communicate directly with tourists, whilst the new forms of virtual agents such as Expedia.com are emerging.

Events and conferences: Festivals, events, and conferences have in history been a significant part of human society. Bowdin (2006) describes an event as specific rituals, performances, presentations, and celebrations that are planned and created to mark a special occasion. Events can be categorised into major events, hallmark events, mega-event, and local events. A more professional form of event tourism is referred to as conference tourism. According to Rogers (2013:42), the conference industry is a highly complex industry comprising buyers (participants/ delegates) and suppliers (industry), illustrating the motion of “supply” and “demand”. Suppliers include conference venues, professional conference organisers, media, sponsors, providers of accommodation, transport, audio-visual equipment, telecommunications, interpreters/translators, entertainers, catering, and software programmes. The consumers of the conference sector include business professionals, academics, and

government sectors. Moreover, it has been indicated that though conference tourism is classified under business tourism, conference consumers often consume leisure-related tourism products such as visiting local attractions. Therefore, events and conference sector represent a major segment of the tourism industry.

8.1.2 Tourism trend analysis

The following review analyse international and domestic tourism over a period of five years or more to provide insights into the trends related to travel behaviour.

8.1.2.1 International tourism

8.1.2.1.1 Tourist Arrivals

International tourism to South Africa has shown a growing trend since the days of isolation due to sanctions. In 1990, a mere 1.029 million tourists visited South Africa and by 2019, this number has increased 10-fold to 10.228 million international tourists. This represents an average growth rate of 9.6% per year in international visitors. This growth has, however, not been smooth and during this time period (1990-2019), there were 6 years in which international visitors declined, with the steepest decline recorded in 2009, although this specific decline can be attributed to a change in recording methodology used by Statistics South Africa to capture African tourists.

If one considers the last 10 years (2010-2019), the average annual growth rate in total international arrivals was 2.8% - the lowest growth decade since 1990. Figures 2 to 4 indicate the annual tourist arrivals from different regions of the world, and it is evident from these graphs that the growth rate is not smooth. Arrivals from all regions seem to have peaked in 2013/4 before starting to decline. After 2015 the trend turned positive again, although the growth rate has clearly started to stagnate towards 2018/9. The lowest growth region during this 10-year period was Australia and New Zealand (0.4% average annual growth), followed by Europe (2.0% average annual growth) and North America (3.3% average annual growth).

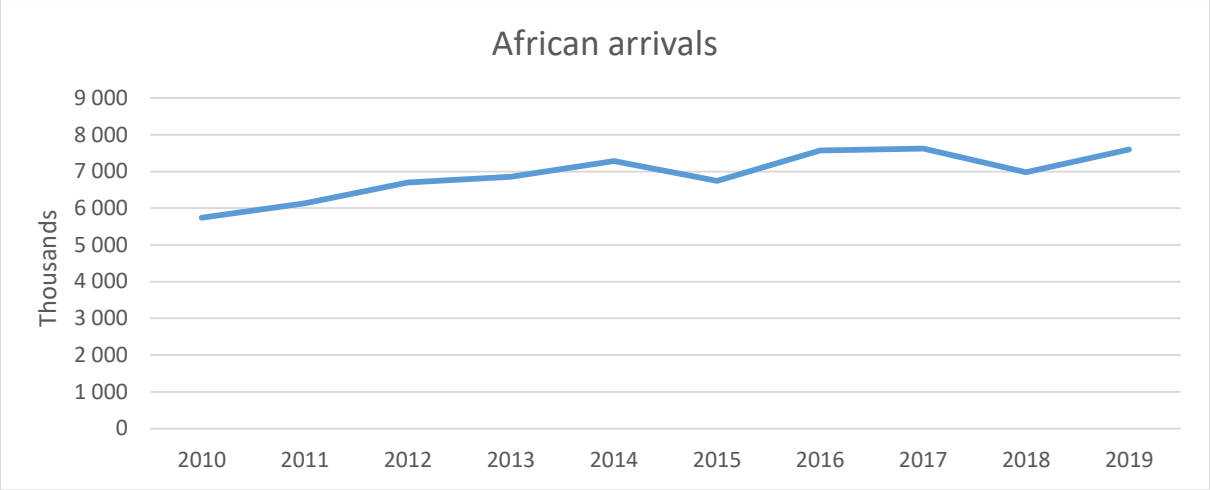


Figure 2: Tourist arrivals from Africa (2010-2019)
Source of data: Statistics South Africa

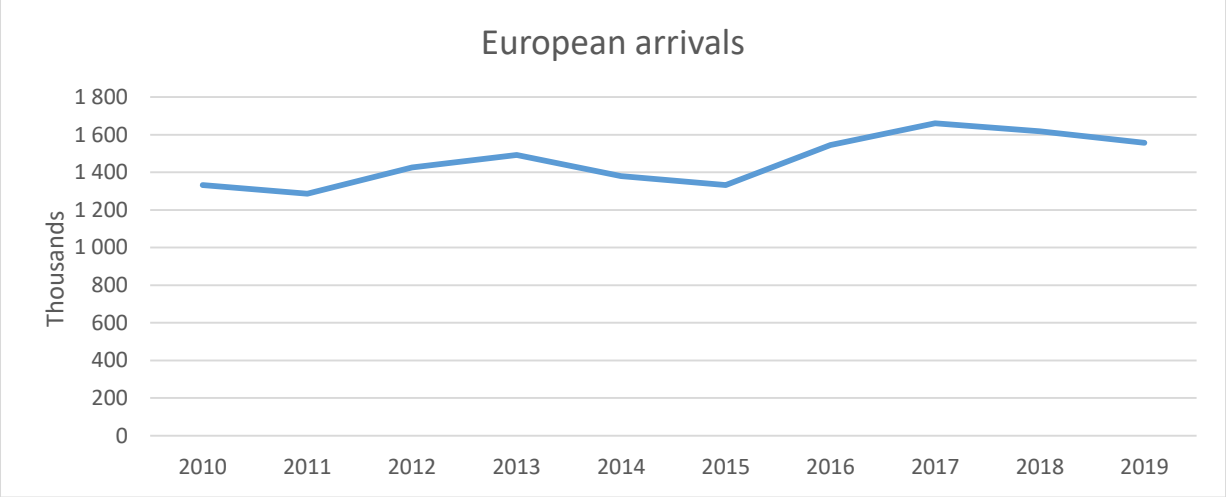


Figure 3: Tourist arrivals from Europe (2010-2019)
Source of data: Statistics South Africa

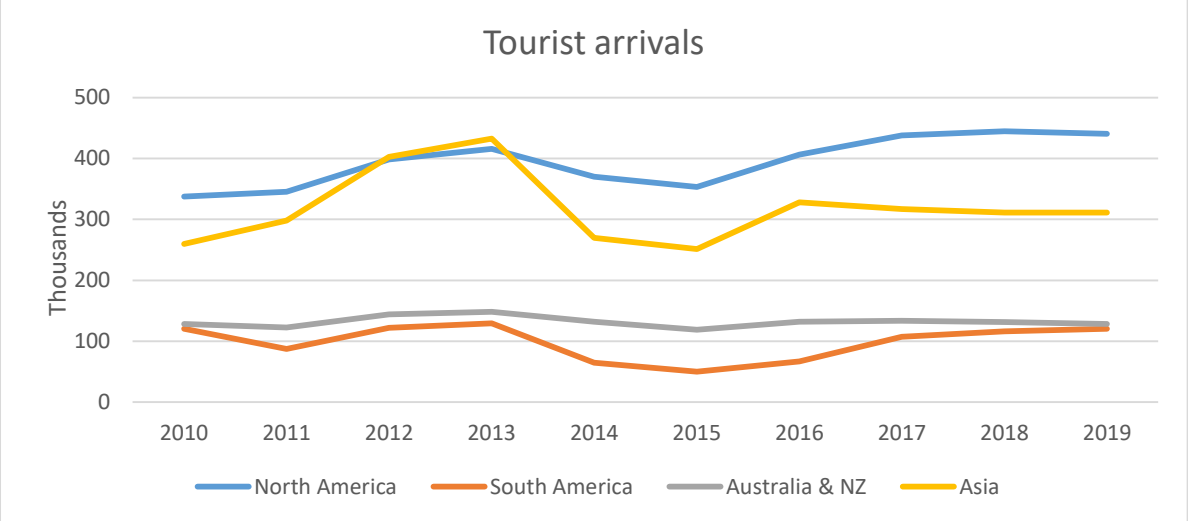


Figure 4: Tourist arrivals from North America, South America, Asia, Australia and New Zealand (2010-2019)
Source of data: Statistics South Africa

The graphs also show another clear picture about international tourist arrivals in South Africa – that it is dominated by arrivals from African countries. Figure 5 shows exactly how dominant this African market is for South Africa, with 75% of all international tourists to South Africa during 2019 originating from an African country. The second most important source region is Europe, representing 15% of all international arrivals, followed by North America at 5%.

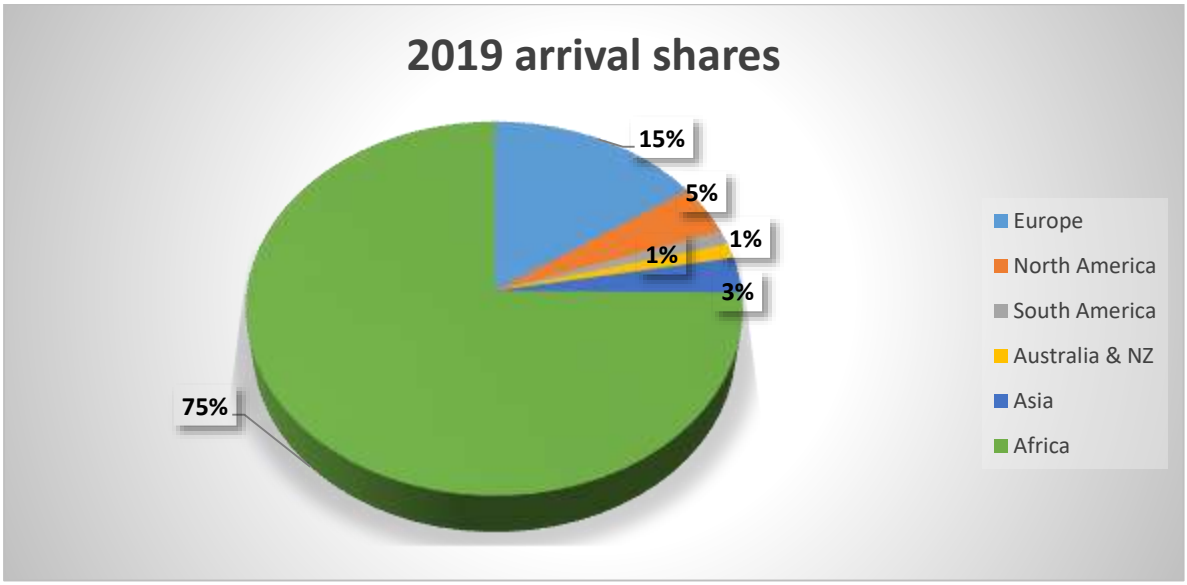


Figure 5: 2019 International tourist arrival shares according to region
Source of data: Statistics South Africa

The main source markets for South Africa from 2010-2019 were:

1. Zimbabwe (20.3%)
2. Lesotho (16.4%)
3. Mozambique (12.8%)
4. Eswatini (8.6%)
5. Botswana (6.2%)
6. United Kingdom (4.5%)
7. United States (3.5%)
8. Germany (3.0%)
9. Namibia (2.2%)
10. Zambia (1.7%)
11. Malawi (1.7%)
12. France (1.5%)
13. The Netherlands (1.4%)
14. Australia (1.2%)
15. China (1.1%)

The African markets, and especially South Africa's neighbouring countries, dominate the top five source markets. Relative fast growth, above 4% are experienced in arrivals from Zimbabwe, Malawi and Eswatini, with Zambia the only African market in the top 15 experiencing negative growth over the past decade. South Africa's main non-African market, the United Kingdom, is also showing decline and the growth rate in arrivals from the UK is -1.7%. The other European markets in the top-15, France, Germany and the Netherlands are growing on average above 4.5% per annum. Arrivals from China and the USA are also growing strongly, with arrivals from China growing at an average rate of 8.2% per year – the highest growth rate of all the source markets in the top 15. Arrivals from Australia is quite stagnant, growing only at an average rate of 0.7% per year.

In terms of the distribution of tourist arrivals among the different provinces of South Africa, Figure 6 shows the percentage of international tourists that visit the various provinces in two distinct years – 2013 and 2019. Note that the percentages do not add to 100%, since tourists visit more than province during their trip to South Africa. From the figure it is evident that Gauteng is the province that most tourists visit, although Gauteng's share is declining from 41.1% to 32.1%. OR Tambo international airport clearly contributes towards Gauteng's popularity, and the increase in international flights to Cape Town is a contributing factor to this decline in tourist arrivals to Gauteng.

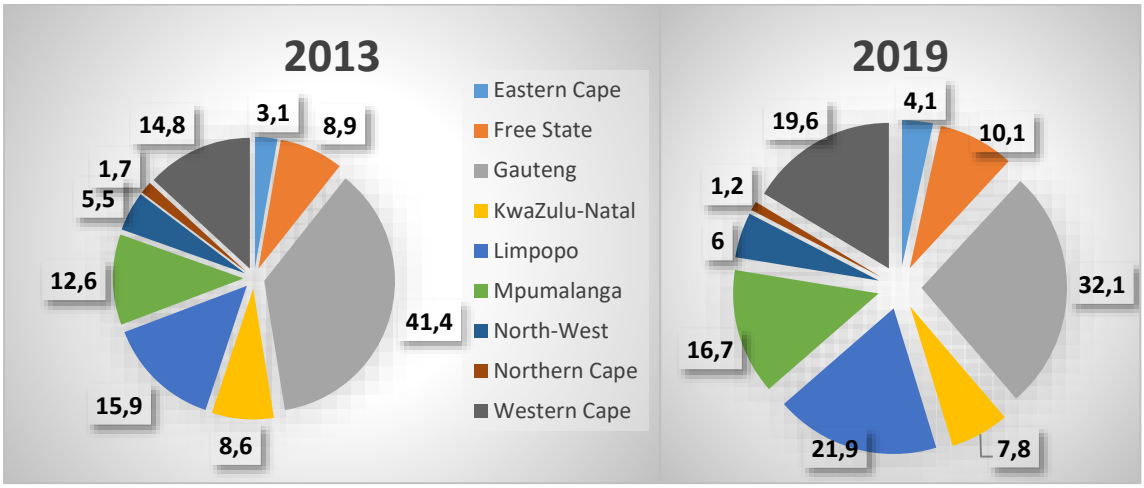


Figure 6: Provincial distribution of international tourist arrivals
Source of data: South African Tourism

The second most popular province is Limpopo, which attracted 15.9% of all tourists during 2013 and 21.9% during 2019. The popularity of Limpopo can mostly be attributed to the border post with Zimbabwe – South Africa's main source market – and Botswana. In fact, more than 90% of tourists to the province originate from these 2 source markets. The Western Cape is the third most preferred destination of international tourists to South Africa and its share is also increasing from 14.8% in 2013 to 19.6% during 2019. Tourists from Europe and North America are the main sources of tourism to the Western Cape. The Eastern Cape is the only other province in South Africa that is more reliant on the non-African source market for international tourism.

Mpumalanga comes in the fourth position and also shows an increasing trend, with borders to Mozambique and Eswatini leading tourism arrivals to this province. Similarly, tourism to the Free State is dominated (more than 90%) by tourists from Lesotho. The only other province besides Gauteng that showed a decline in popularity between 2013 and 2019, in the Northern Cape, whose main source market (approximately 70%) is tourists from Namibia crossing the land border between the 2 countries.

8.1.2.1.2 Purpose of visit

The main purpose of international visitors to South Africa is for personal reasons, and most specifically holiday, leisure and recreation. Figure 7 below shows that between the period 2015-2019, 96.64% of all tourists to the country came here for holiday, leisure and recreation reasons, with only 3.33% business and professional tourists.

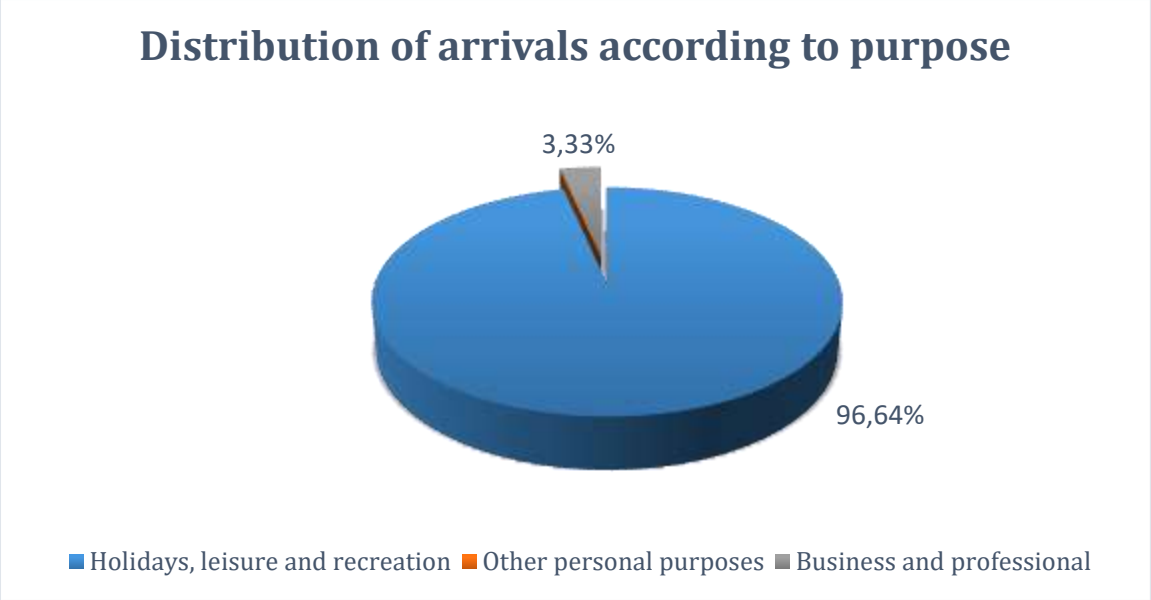


Figure 7: Distribution of international tourist arrivals according to main purpose
Source of data: UNWTO

A closer inspection of the distribution of business versus holiday tourists over time shows that the ratios remained roughly similar over the 5 years prior to 2020 and there is no clear increasing or decreasing trend. International tourists from Asia and the Middle East have the greatest percentage of business tourists during this time period, totalling 5.9% and 4.7% of total Asian and Middle Eastern tourists respectively. Tourists from Central and South America (1.6%) and Australasia (1.8%) travel the least for business purposes to South Africa. Statistics South Africa also indicates travelling for study purposes as a separate reason for tourism to South Africa and here tourists from the Middle East (1.6% of total tourists from that region) and Asia (1.1% of total tourists from Asia) travel more for study purposes to South Africa.

8.1.2.1.3 Tourist spending

Similar to tourist arrivals, international tourist spending in South Africa increased over time, reaching R82.529 billion in 2018. Also similar to arrivals, the growth rate in total spending is dwindling and a negative growth of 1.6% was experienced in 2019 – even before the onset of the Covid-19 pandemic. Figure 8 shows how the growth rate in spending has changed over time.

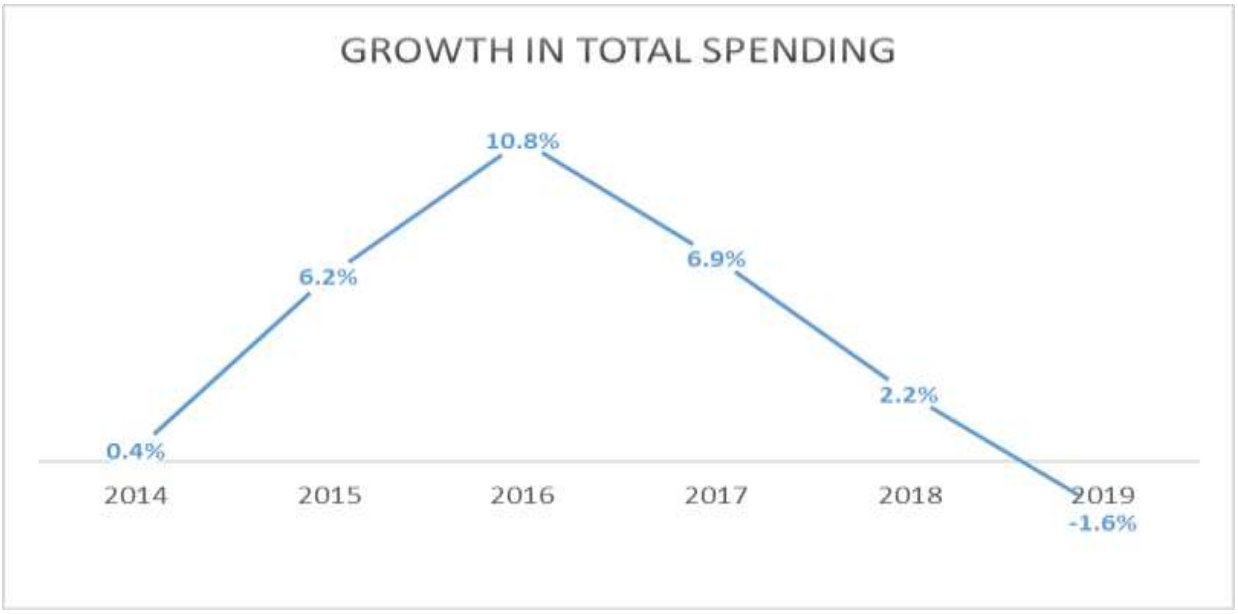


Figure 8: Growth in total tourist spend
Source of data: South African Tourism

When assessing the spending for different regions, Figure 9 shows some interesting trends. The spending data distinguish between African arrivals that come into South Africa by crossing the land border and those arriving at airports. Even though arrivals from Africa is on an increasing trend, it is evident that especially spending from African tourists arriving by land (South Africa's main source markets) is on a decreasing trend (5% decline per annum), while spending of African arrivals by air is stagnating after fast growth during 2015.

Spending by European tourists as well as those from Australasia and the Americas are on an increasing trend. Spending by European tourists increased by an average of 14.8% per year, much more than the increase in European arrivals. Similarly, spending by tourists from the Americas is increasing by 13.5% per year, exceeding the increase in arrivals.

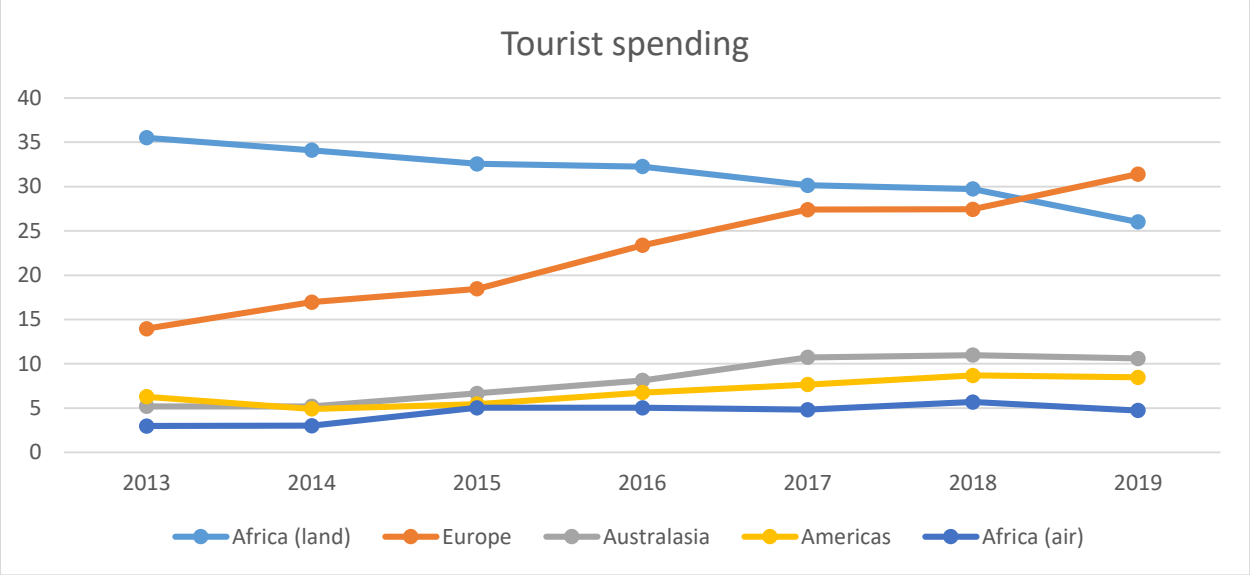


Figure 9: Total tourist spending according to region of origin (Rand billion) Source of data: South African Tourism

In terms of the top source markets that visit South Africa, total spending is on an increasing trend for tourists from the UK (average annual growth of 14.2%), the USA (average annual growth of 14.2%), Germany (average annual growth of 15.5%), Botswana (average annual growth of 9.5%) and Lesotho (average annual growth of 1.5%). However, total spending by tourists from Zimbabwe, Mozambique, Eswatini and Malawi are on a decreasing trend, which is in line with the decreasing arrivals from most of these markets.

8.1.2.1.4 Length of stay

The length of stay of international tourists to South Africa and the average number of provinces they visit, differ for tourists from various markets. In this analysis, the top 5 African markets and the top 5 overseas (non-Africa) markets are analysed for the time period 2013-2019. Table 1 below indicates the average number of days that a tourist from a certain source market stayed in South Africa and the average number of provinces visited during his/her stay in brackets.

Table 3: Average length of stay and number of provinces visited (2013-2019)

	2013	2014	2015	2016	2017	2018	2019
Zimbabwe	4 (1.1)	4 (1.0)	6 (1.1)	5 (1.0)	7 (1.0)	5 1.0)	5 (1.0)
Lesotho	10 (1.0)	10 (1.0)	10 (1.0)	9 (1.0)	15 (1.0)	13 (1.1)	14 (1.0)
Mozambique	6 (1.0)	7 (1.0)	9 (1.1)	13 (1.3)	14 (1.2)	14 (1.0)	13 (1.0)
Eswatini	10 (1.0)	11 (1.0)	7 (1.0)	6 (1.0)	8 (1.0)	9 (1.0)	9 (1.0)
Botswana	4 (1.0)	3 (1.0)	4 (1.3)	3 (1.3)	5 (1.3)	4 (1.2)	5 (1.3)
UK	14 (1.3)	15 (1.3)	14 (1.3)	13 (1.4)	15 (1.4)	16 (1.5)	15 (1.5)
USA	15 (1.5)	15 (1.5)	15 (1.6)	13 (1.7)	15 (1.6)	16 (1.7)	16 (1.6)
Germany	17 (1.5)	17 (1.6)	18 (1.7)	15 (1.8)	18 (1.8)	19 (1.8)	19 (1.8)
France	12 (1.4)	14 (1.5)	14 (1.6)	12 (1.7)	17 (1.8)	19 (1.9)	18 (1.9)
Netherlands	17 (1.6)	19 (1.7)	18 (1.7)	15 (1.8)	19 (1.8)	20 (1.9)	18 (2.0)

Source of date: South African Tourism

From the table it is clear that visitors from Zimbabwe and Botswana spend less than one week in South Africa, while overseas tourists spend at least 2 weeks in the country. This is expected, since travel cost is more expensive for overseas tourists than neighbouring countries. Some trends are also visible in the nights spend, for example, tourists from Mozambique and Lesotho are starting to spend more time in the country, and so do French tourists.

In terms of the number of provinces visited during their stay, it is also evident that African tourists tend to visit only 1 province, while European tourists tend to visit more than one province. Figure 10 indicates the average number of days that international tourists spend in the different provinces during two separate years, 2013 and 2019. It is clear that tourists spend on average more time in the Western Cape province than in any of the other provinces. The least number of nights are spent in Limpopo province during both these time periods. The average time spent in each province is increasing, except for the North-West province, where the number of nights spent stayed constant.

Gauteng and Mpumalanga show the largest increases in average time spent in the province.

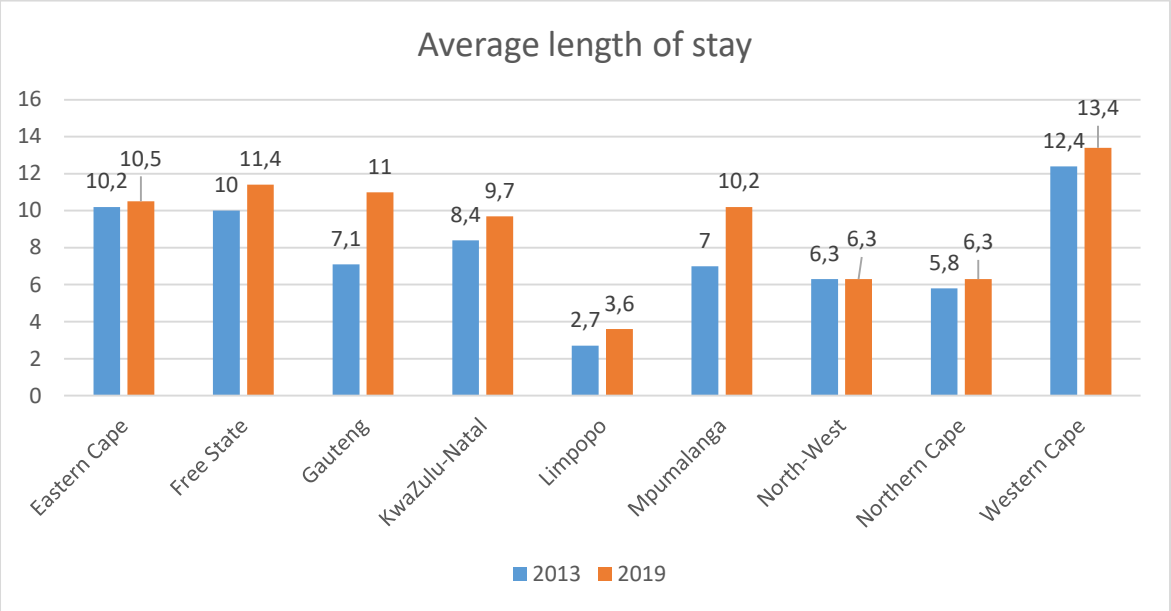


Figure 10: Average length of stay in each province by international tourists
Source of data: South African Tourism

8.1.2.2 Domestic Tourism

8.1.2.2.1 Number of trips per year

South African citizens travel within the country for various reasons, including holiday, business, visiting friends and family, and short excursions. For data capturing purposes, these are all referred to as trips that domestic tourists make per year. Figure 11 shows the number of trips (in thousands) that South Africans make during the years 2013 to 2019. Statistics South Africa distinguishes between day trips and overnight trips in the compilation of domestic tourism statistics and both these are indicated in Figure 11.

The total number of trips undertaken by South Africans during 2013 amounted to just more than 105 million trips. Of these, 51.7% were day trips (the blue bars). The total number of trips declined steadily to reach 82 million during 2016. The decline in day trips were steeper than the decline in overnight trips, although both declined during this period. The year 2017 saw an increase in domestic trips undertaken by residents of South Africa, although it was not substantial enough to reach 2013 levels again.

During 2019 there was a steep increase in both overnight and day trips. This increase can partially be contributed to a change in the survey methodology used by Statistics South Africa and comparison with previous year should thus be treated with caution.

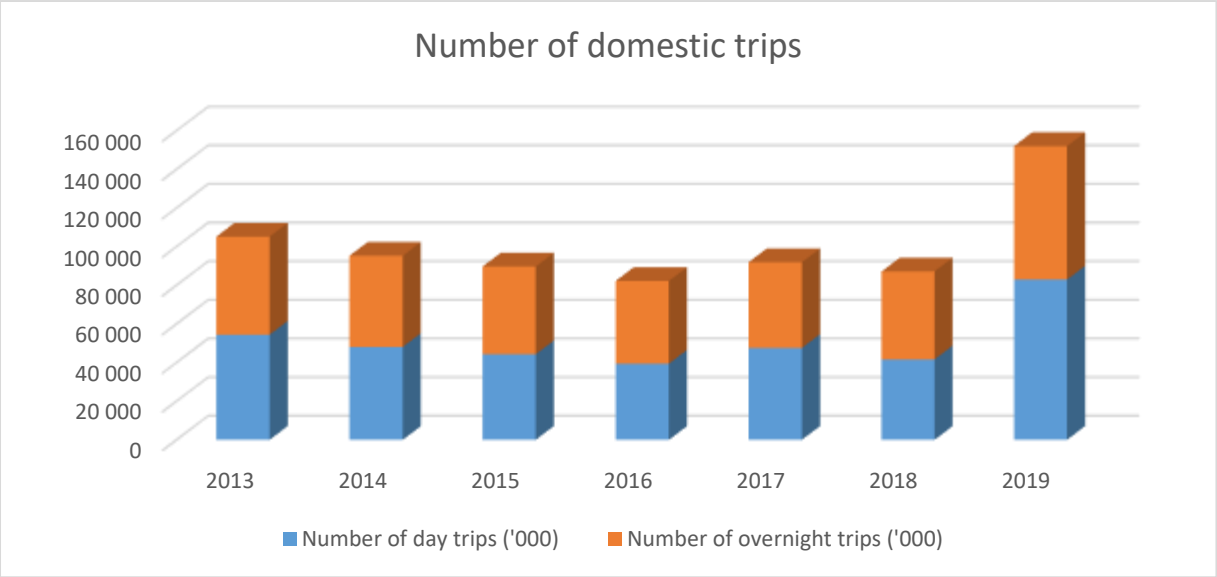


Figure 11: The number of day and overnight trips undertaken by South Africans (2013-2019)
Source of data: Statistics South Africa

The number of overnight trips in South Africa declined from 50.768 million to 42.8 million during 2016 before it started to increase again to 45.5 million during 2018.The year 2019 saw overnight trips increasing to almost 70 million, although the same caveat as above applies. From 2013 to 2016, overnight trips as a percentage of total domestic trips increased from 48.3% to 52.1%.

Which provinces are most popular for domestic tourists

Figures 12 and 13 illustrates the distribution of domestic trips between the different provinces during the years 2013 and 2019. Similar to the analysis above, day trips are shown separately from overnight trips.

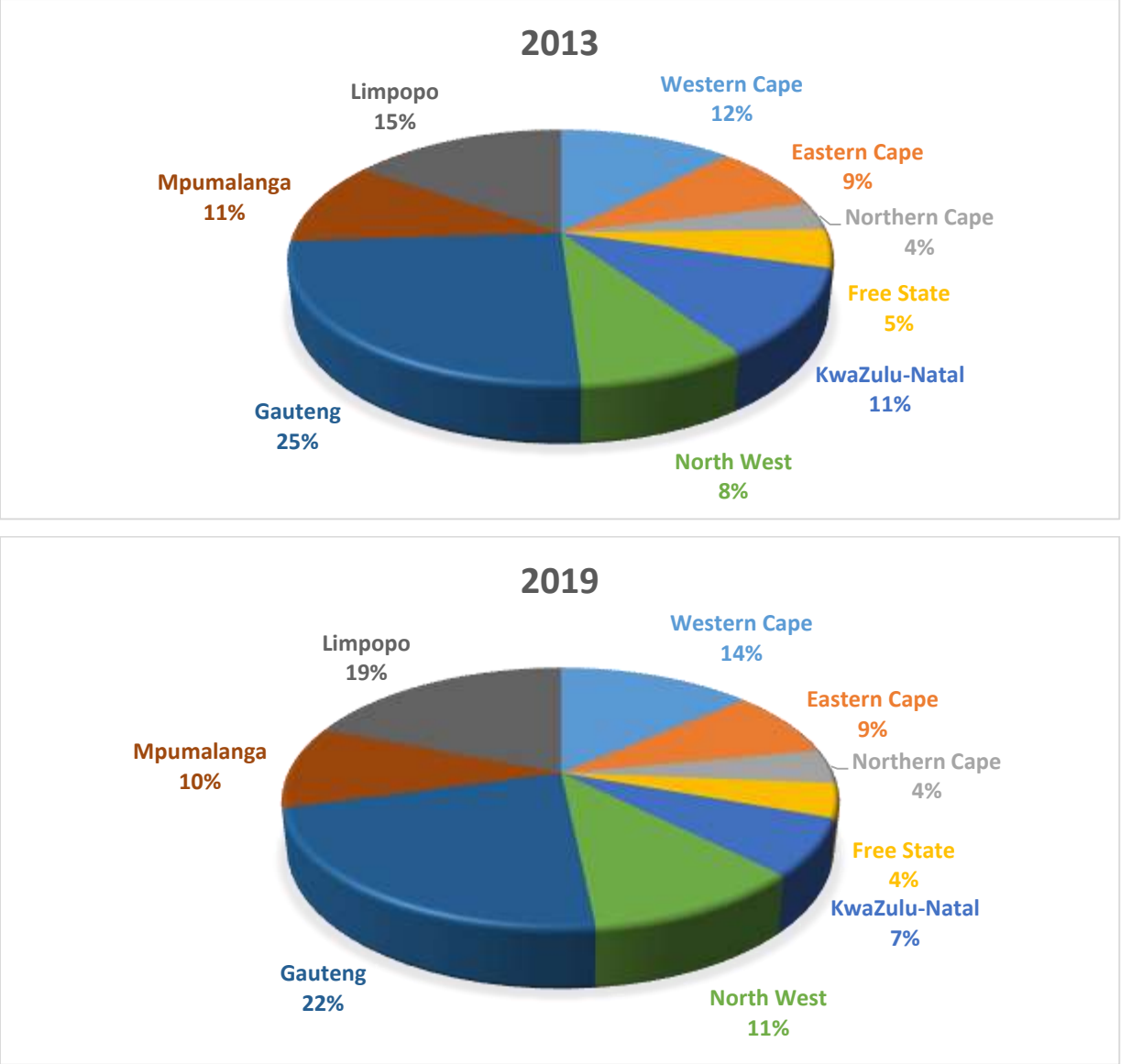
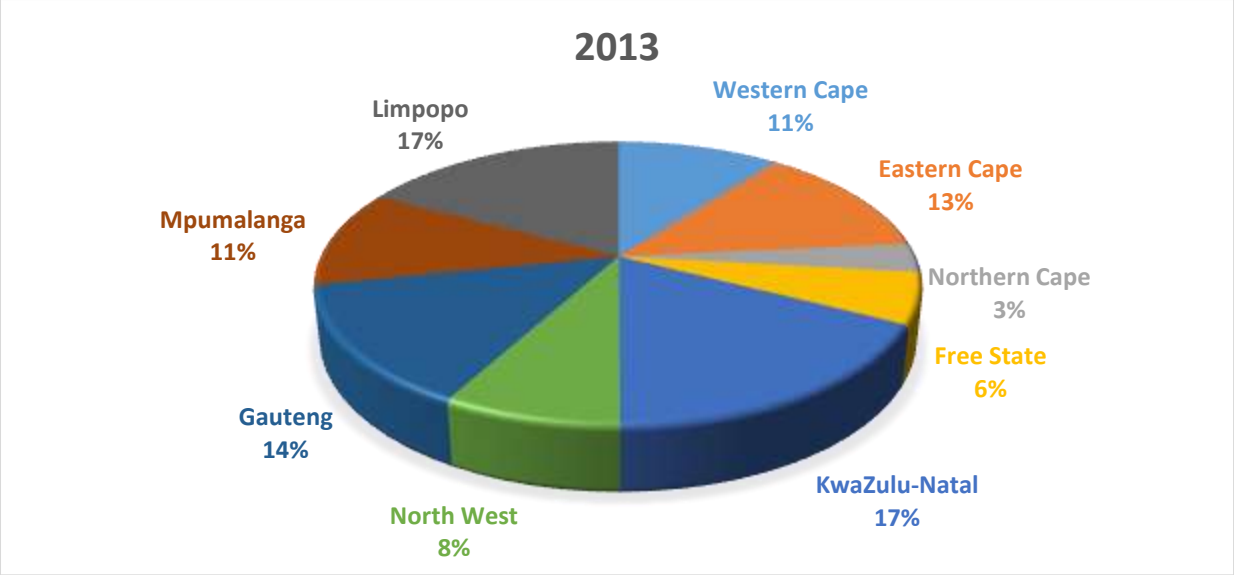


Figure 12-13: Percentage of day trips to each province (2013 and 2019)
Source of data: Statistics South Africa

In terms of day trips, Figure 12 shows that the province that attracts the most day trips during 2013 and 2019 are Gauteng, although its popularity is decreasing from 25% to 22% of all-day trips. The other province that is losing market share is KwaZulu-Natal, while Limpopo, the Western Cape and North-West provinces are gaining market share. The remainder of the provinces boasts relative constant market shares in terms of day trips.



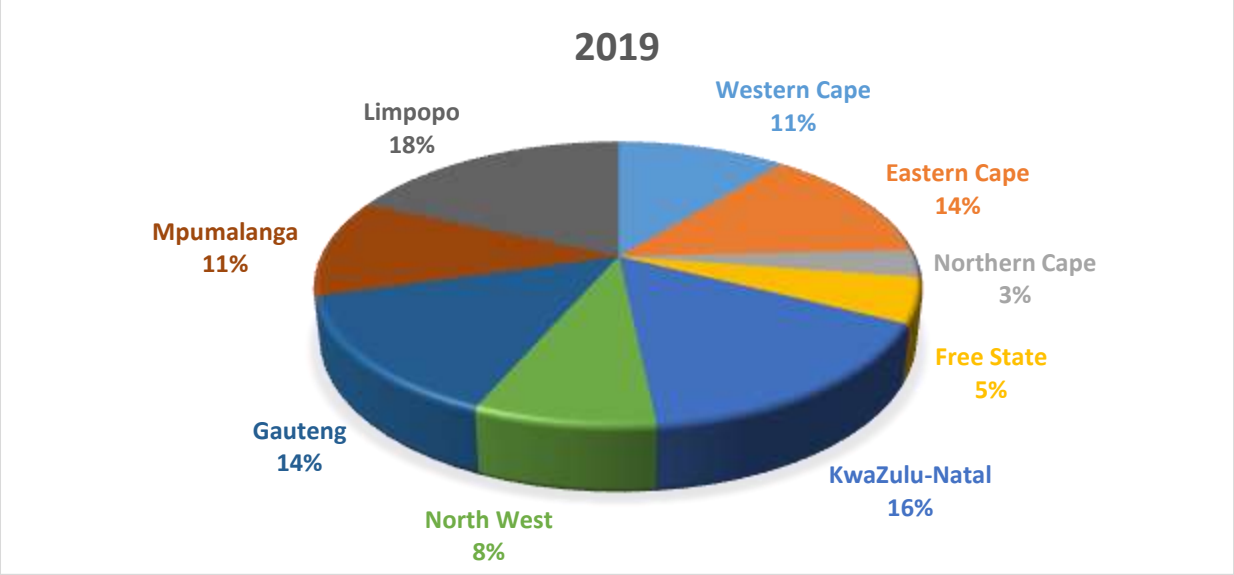


Figure 14-15: Percentage of overnight trips to each province (2013 and 2019) Source of data: Statistics South Africa

Figure 14 shows the provincial shares of overnight trips for both 2013 and 2019. A quick glance at the pie charts indicates that the shares remained roughly constant over time, with Limpopo and the Eastern Cape gaining slightly, while KwaZulu-Natal and the Free State lost marginally on market share. Limpopo remains the most popular province for overnight trips, slightly above KwaZulu-Natal. The Northern Cape and Free State are the least popular overnight destinations for local tourists.

8.1.2.2.2 Tourist spending

The domestic tourism market is worth more than R100 billion per year if both day and overnight trips are considered. In total, South Africans spent R103.9 billion during day and overnight trips during 2013. This increased to almost R110 billion during 2014, after which it fluctuated lower, following the trend in declining number of trips seen in Figure 11. However, 2018 saw the trend reverse, with total spending increasing above R100 billion again for the first time since 2014. Similar to the number of day trips, it is clear the changing methodology used by Statistics South Africa amounted to a huge jump in spending of domestic tourists on day trips, totalling R124.9 billion during 2019. In total, this pushes the value of domestic tourism trips over R200 billion for the year 2019. Figure 16 shows the expenditure on day and overnight trips of domestic tourists.

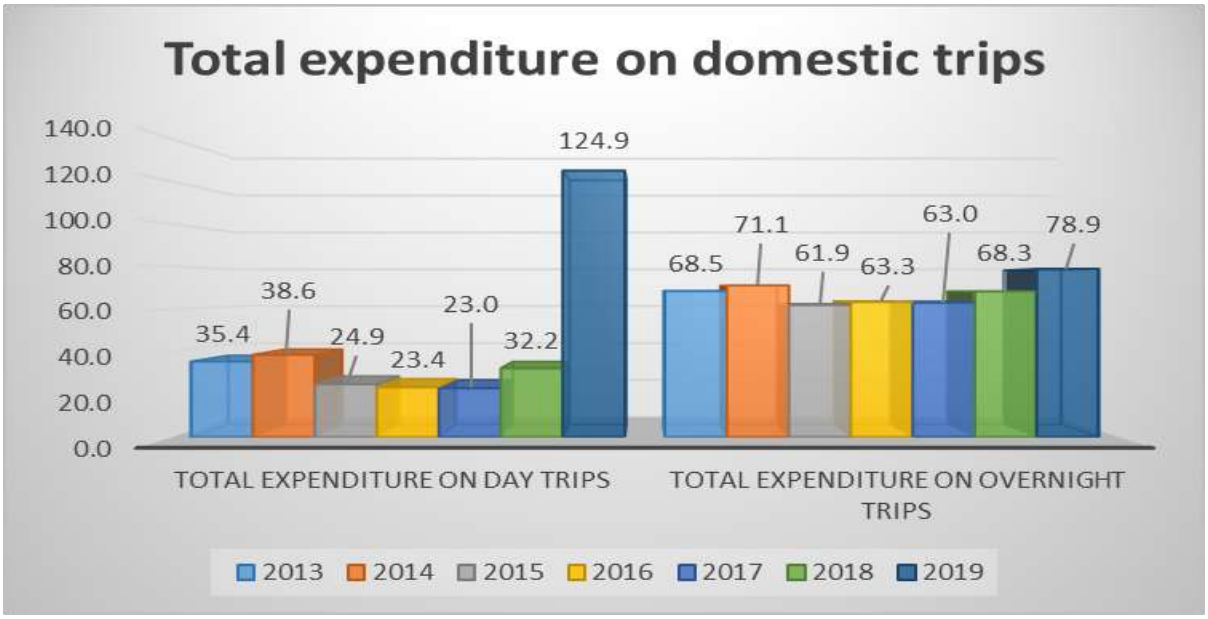


Figure 16: Domestic tourist spending on day trips and overnight trips (2013-2019)
Source of data: Statistics South Africa

From Figure 16 it is also evident that total spending on overnight trips exceeds that of day trips, except for 2019. While the split between overnight and day trips range between 48:52, it is clear that total spending is significantly more during overnight nights – in most years, double that of day trips.

The main spending items for day tourists are shopping (53% of total spending during 2019), transport (25%) and food and beverages (17%). Overnight tourists spend the

most on transport (31% of total spending in 2019), followed by shopping (24%), food and beverages (19%) and accommodation (18%). The distribution of spending for both day trips and overnight trips have remained roughly constant since 2013.

8.1.2.2.3 Purpose of visit

What is the main reason for undertaking day and overnight trips? Figure 17 shows the main reason that South Africans undertook day trips during the years 2013 and 2019. During 2013, visiting friends and family were the main reason for day trips. This has, however, changed, and during 2019, 35.6% of day trips were for shopping purposes. Visiting friends and relatives were the second most important reason for day trips during 2019. Other important reasons for day trips include leisure, business and medical/health reasons.

Figure 17: Main reason for undertaking day trips (2013 and 2019)
Source of data: Statistics South Africa

Figure 18 illustrates the main reasons for overnight trips, also during the years 2013 and 2019. The reasons for undertaking an overnight trip have remained relatively stable over time, with visiting friends and relatives the main motivation during both these periods. This is followed by overnight trips for leisure purposes. Note that during 2013, the options of “funeral”, “medical/health” and “study/educational” were not

available and therefore some of the responses under “other reasons” belong to those categories.

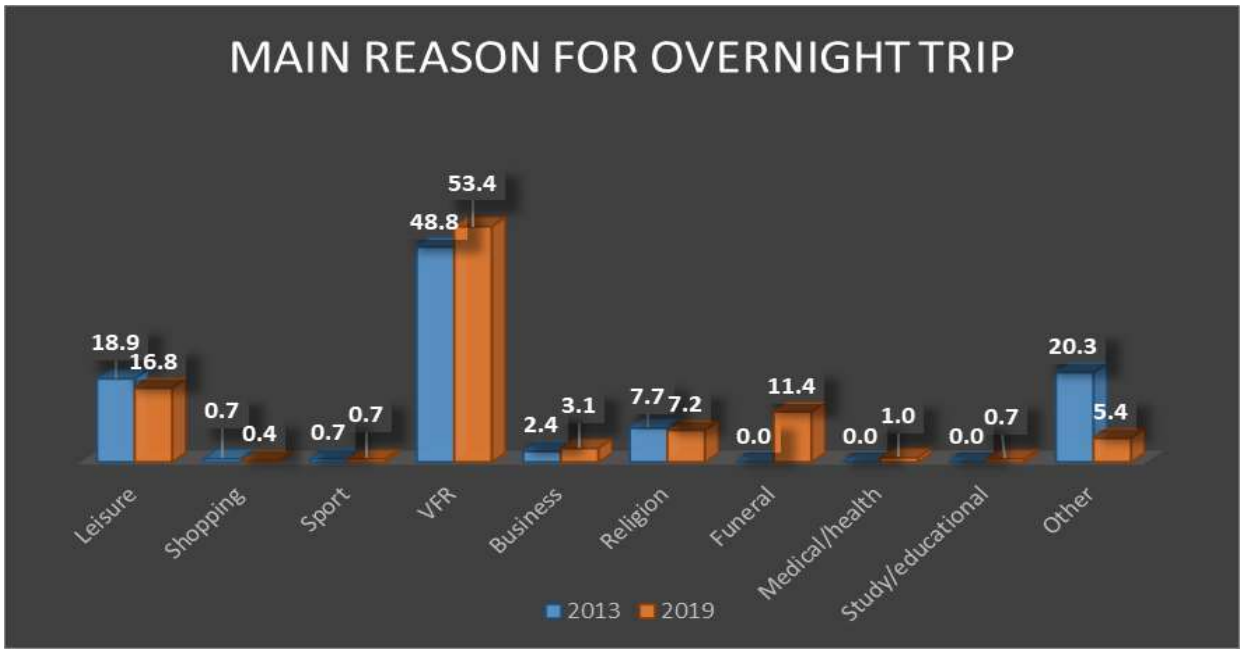


Figure 18: Main reason for undertaking overnight trips (2013 and 2019)
Source of data: Statistics South Africa

8.1.2.2.4 Length of stay

The number of nights spent during an overnight trip was assessed using three categories: 1 night, 2-4 nights and 5 nights or more. This was only assessed by Statistics South Africa from 2013 – 2017. The Table below summarises the distribution of responses.

Table 4: Nights spent on overnight trips (percentage)

	2013	2014	2015	2016	2017
1 night	15.3	14.6	14.2	13.7	14.7
2-4 nights	53.1	51.7	54.1	54.8	55.2
5 or more nights	31.6	33.7	31.7	31.5	30.1
Unspecified	0.2	0.5	0.2	0.4	0.3

Source of data: Statistics South Africa

It is clear that the distribution of responses remains roughly similar and that the most overnight trips (above 50%) across all years are 2 – 4 nights in duration. During 2014 there was a slight increase in the percentage of persons spending 5 or more nights on

overnight trips, although this trend has reversed again and the percentage of respondents that stay longer than 5 nights on an overnight trip, is decreasing steadily.

The main trends in international tourism can be summarised as:

- A slow-down in the overall growth rate of tourist arrivals to South Africa.
- Neighbouring countries remain the main source of international tourists and arrivals from these markets are growing at a reasonable rate.
- China and the USA are growing source markets, while the UK is a dwindling source market.
- Gauteng is the most visited province but is losing market share, mainly to the Western Cape.
- Provinces that border neighbouring countries remain popular destinations.
- South Africa is a predominant holiday destination with business arrivals only 3.33% of total arrivals.
- Income from tourism reached a peak of R82.5 billion in 2018.
- Total spending from African markets are following a downward trend, while overseas markets show a growing trend.
- Overseas tourists spend more nights in South Africa than African tourists and they also visit more provinces.
- Tourists spend on average more nights in the Western Cape province and the least number of nights in Limpopo.

The main trends in domestic tourism are:

- The total number of trips South Africans undertake per year was on a declining trend, but the trend turned around during 2017.
- There are more day trips than overnight trips in a typical year.
- The main provinces that South Africans travel to for day trips are Gauteng, Limpopo and the Western Cape.
- The main destinations for overnight trips are Limpopo, KwaZulu-Natal, Gauteng and the Eastern Cape.
- Considering both day and overnight trips, the value of the domestic tourism market exceeded R200 billion during 2019.

- Overnight trips accounted for approximately R79 billion during 2019, slightly less than the value of the international tourism market during that year (R81 billion).
- Since 2017, there is an increasing trend in domestic tourist spending.
- Shopping is increasing in importance as a reason for day trips.
- Visiting friends and relatives remain the main reason for overnight trips, followed by leisure.
- Most overnight trips range from 2-4 nights.
- Domestic tourists are shortening their overnight stay, with a decreasing percentage spending 5 or more nights on a trip in favour of 2-4 nights.

8.1.3 Review of tourism resilience models

8.1.3.1 Building back better

The term building back better (BBB) can be traced back to the Government of Sri Lanka‘s Post-Tsunami Recovery and Reconstruction Strategy and BBB Guiding Principles (Government of Sri Lanka 2005) and Clinton’s (2006) report based on the Indian Ocean Tsunami in 2004. The Clinton report produced ten propositions about BBB. The first proposition calls for governments, donors and aid agencies to recognize that families and communities drive their own recovery. The next four propositions require that the process of recovery must promote fairness and equity, and that the state must enhance preparedness for future shocks, devote resources to strengthen local-level recovery efforts and coordination of responses. The last five propositions call for clarity of roles from the development agencies, creating conditions for entrepreneurship to flourish while reducing rivalry and unhealthy competition, and leaving communities safer by reducing risks and building resilience.

The post-recovery guidelines that existed before the Indian Ocean Tsunami include the United Nations Disaster Relief Organisation’s (UNDRO) (1982) Principles for Settlement and Shelter, and the Federal Emergency Management Agency (FEMA) (2000). Although the former guidelines are within the context of shelter from the perspective of the survivor, they provide lessons on the need for risk reduction, needs-based provision of resources to the survivor and community, and the stakeholder role allocation. The latter explains the need for sustainable actions to be incorporated into

the post-disaster recovery process and introduces the principles and practices of sustainable development that can help communities rebuild stronger, safer and smarter and thereby become less vulnerable to future disasters.

The first decade after the term BBB was introduced did not yield any uptake of the term by other guidelines on recovery and/or reconstruction. For instance, the Bam's Reconstruction Charter (Omidvar, et al., 2010), the Recovery and Reconstruction Framework of the Victorian Bushfire Reconstruction and Recovery Authority (VBRRA, 2011) and Recovery Strategy of the Canterbury Earthquake Recovery Authority (CERA, 2013) did not use the term BBB. Instead, community engagement, and restoring and enhancing the community's resilience were some of the key terms used in the reports. This changed drastically in the next decade, starting with the Sendai disaster management framework of 2015, which stipulates four priorities, namely understanding risks, strengthening disaster risk governance to manage shocks, investing in disaster risk reduction for resilience and enhancing disaster preparedness for effective response and to "BBB" in recovery, rehabilitation and reconstruction. United Nations Office for Disaster Risk Reduction (UNISRD, 2017) built on the Sendai disaster management framework and used the following definition for BBB:

> The use of the recovery, rehabilitation and reconstruction phases after a disaster to increase the resilience of nations and communities through integrating disaster risk reduction measures into the restoration of physical infrastructure and societal systems, and into the revitalization of livelihoods, economies, and the environment (p.6).

8.1.3.2 The resilience cycle

Holling (2001) developed the tourism resilience cycle, which has now been termed the 'Holling loop', which has four stages as shown in Figure 19. The stages include reorganization, exploitation, conservation and release.

The four stages, as summarized by Cochrane (2010), are as follows:

1. Reorganization: rapid change after a destabilizing event, with regeneration and renewal of societal structures.

2. Exploitation: new systems are created through exploitation of social and other forms of potential produced in previous phases. New institutions may emerge and new political, cultural and social relationships form more easily.
3. Conservation: the gradual construction of a new stable state, when structures are institutionalized and new capital is formed. Structures can become increasingly interconnected, leading to rigidity and inflexibility.
4. Release: a disturbance event (or series of events) that destabilizes existing systems, releasing the rigidity of structures and leading to rapid changes.

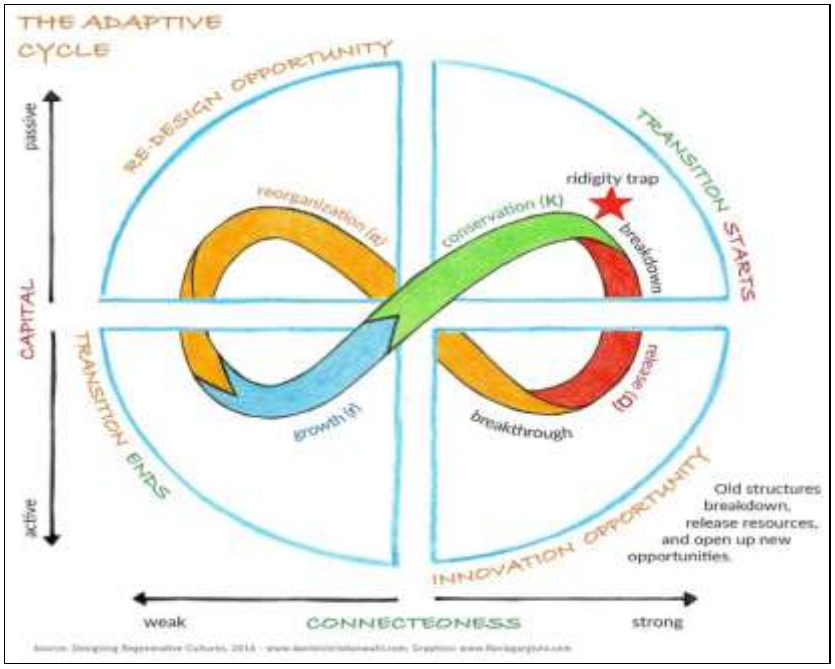


Figure 19: The resilience cycle

Source: Adapted from Kinaham (2018)

8.1.3.3 Scale, change and resilience in tourism

Cheer and Lew (2017) provide a diagrammatic representation of the circumstances needed to create resilient tourism systems as shown in Figure 20.

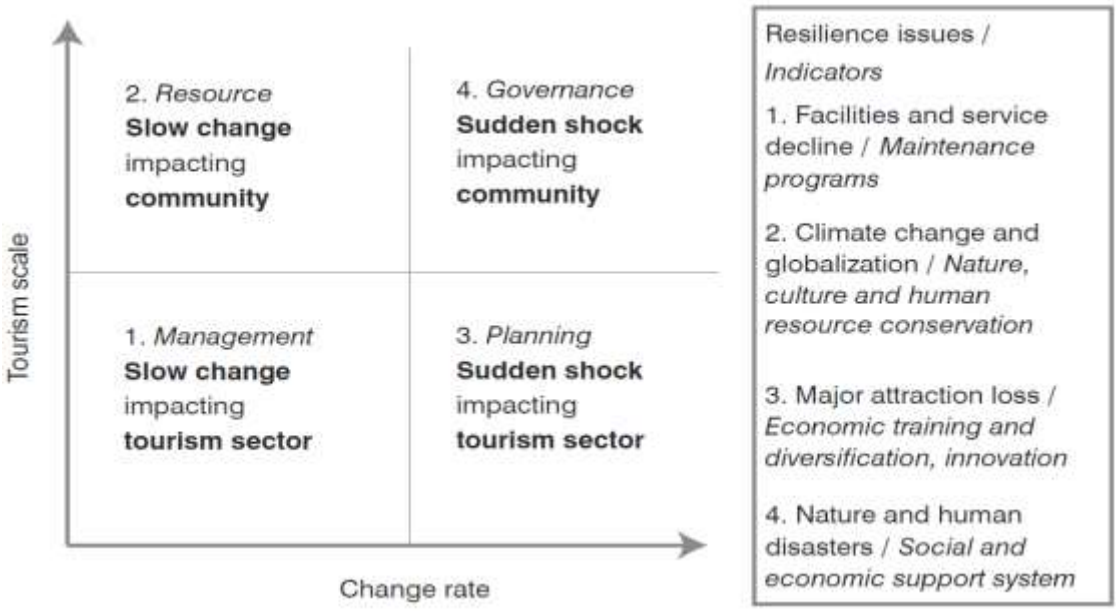


Figure 20: Scale, change and resilience in tourism

Source: Cheer and Lew (2017)

The four quadrants presented by Cheer and Lew (2017) are split between community and the tourism sector. The model conceptualizes four generalized types of tourism contexts, based on the degree of disturbance and the scale of tourism actors that are involved to indicate that as change happens, whether slow or fast, it has impacts on the community as much as on the tourism demand and supply. There are two spatial scales that are defined by the model at which resilience operates in a tourism context. The community resilience is one scale and business resilience another, yet both are forms of organizational resilience. However, business resilience is usually more narrowly confined to the ability of the economic sector and/or enterprises to adapt, thrive, and oftentimes innovate in response to the changing business environment using a range of resources and capacities available to them (Orchiston et al., 2016). Business resilience is also related to the extent to which business stakeholders can self-organise and reframe business operating conditions, sometimes through attrition or innovative practices (Dahles & Susilowati, 2015).

8.1.3.4 Stockholm Resilience Centre's Model

The Stockholm Resilience Centre's (SRC) (2015) Seven Principles for Building Resilience in Social-ecological Systems has shaped resilience thinking of most

tourism studies. As shown in Figure 21, the principles are instructive in showcasing the essential approaches to examining the interacting systems of people and nature.

Figure 21: Seven principles for building resilience in socio-ecological resilience building
Source: SRC (2015)

According to Biggs et al. (2015), the seven principles offer critical and practical guidance toward the construction of resilience in social-ecological systems. The advantages of using these seven principles are that they identify key opportunities for working with and intervening in socio-ecological systems to ensure that they remain resilient and able to provide the ecosystem services needed to sustain tourism communities and contexts.

8.2 Qualitative results

8.2.1 Results related to demand

The following themes resulted from the qualitative interviews.

Theme 1: The impact of the pandemic on demand for South Africa's tourism offer over the past two years

Respondents reacted mostly the same on the questions related to the impact of the pandemic on demand. One of the participants stated that from a regional perspective South Africa realised how much the country rely on tourism which motivate strategies to adapt and return to pre-COVID-19 levels. It is important to take the trends into account so that the country becomes attractive again for tourists. All participants

agreed that the pandemic had (still have) a devastating effect on the South African tourism industry. The complete closing of the industry was severe and the announcement of the Omicron variant in South Africa led to further travel bans and negative messages which influenced the appeal of the country. Countries such as the UK's reaction to the variant damaged the tourism appeal of this country further. One of the participants did indicate that there was significant growth in tourist numbers when the lockdown was lifted but the imposed travel bans led to cancellations again. This has an effect on the trust that tourists have in the ability of the country to manage the pandemic. All participants highlighted the closing of borders which cut off international travel completely. One participant emphasised that the travel bans were devastating with stop/start effects. People just got excited to travel, and then they had to make other plans – travelling to SA does not just happen, there is a lot of planning involved.

Some of the participants were optimistic indicating a return to full travel towards the end of 2021 but most of the participants focused on 2024 for a full recovery. This is, however, influenced by the development of COVID-19 and the government's reactions in that regard. The possibility of co-existence with COVID-19 was also mentioned and this should be taken into account in all planning, development and marketing efforts. The negative effect of the traffic light approach was also highlighted, as well as the negative perceptions that developed due to this approach.

It was clear from the opinions of the participants that the focus shifted to domestic tourism with some businesses losing 75% of their business activities over the last two years. Participant one indicated that an unintended consequence of the negative view of South Africa as a tourism destination led to an increase in domestic tourist numbers with locals travelling in their own country since they could not travel overseas. Local tourism products adjusted their prices to attract domestic tourists as a way of surviving. It was also mentioned that South Africans realised that they had to support the local tourism industry for it to survive and in the absence of international travel opportunities domestic travel took place. It was however clear that domestic tourism saved the industry but not to a profitable point as indicated by participant 5. The national market could not substitute the international market, but their support resulted in the survival of businesses.

Clearly the uncertainty regarding, how to implement certain measures, the change in measures and when to do what was a frustration for everyone in the industry. However, participants felt that …..

"…South Africa… in fact managed the pandemic very well."

Although participants specifically highlighted the effect of the pandemic on accommodation and the events and conference sectors most indicated that the whole value chain was affected which also led to the closing of businesses. It was also stated that the industry supported each other where possible and that there were industry interventions applied to alleviate some of the effects of the pandemic. One participant noted that businesses were not in competition during this time, all worked together to survive.

Theme 2: Change in business structure and operations

The business environment changed significantly with a focus on technology, and this was indicated by participants that stated that restructuring many businesses was necessary. Staff had to be equipped to work from home which had cost - and training implications. Some facilities were re-purposed and served for example as quarantine facilities and sites. This was however not possible in all cases. In the opinion of the participants, South Africa is on par with other countries in terms of response. With regard to the health protocols, there was an investment in buying the right equipment to adhere to the requirements and it was well communicated. Some of these measures implemented and some changes in the business environment will remain as certain processes are now more efficient.

Theme 3: Change in tourist behaviour

An event such as COVID-19 bring changes and it also changes the behaviour and choices of people and more specifically tourists. COVID-19 brought the industry to a halt and grounded the entire world. New aspects are now considered before travelling, such as health safety and risk factors. Participant one stated that the behaviour of tourists that travel annually definitely changed and they now review travelling options based on safety. Since many regular travellers did not travel for two years, they saved

more money and could expand their options in terms of travel choices with some destinations offering cheaper options to recoup their losses.

On the other hand, some participants were also of the opinion that COVID-19 did not change travel motivations but prevented travel. It was more the level of uncertainty that kept people from travelling and holding on to their resources such as discretionary funds. The pandemic brought uncertainty which is an important aspect to consider when approaching target markets. Participants are of the view that family travel will be very important in the next few years, with families focusing on privacy and safety as travel determinants. There was also a change in consumer preferences, where tourists returned to travel agencies to make bookings, because of the ever-changing state of restrictions. Given the rapid changes in regulations tourists are not as updated as travel agencies and how they would not know how these restrictions will influence their travel plans when travelling overseas – the travel agent is again trusted and preferred. This might be a trend going forward due to the uncertainty related to health protocols and restrictions for destinations and en-route destinations. Another aspect that was mentioned was that in general people were (are) rediscovering South Africa and the hidden gems were advertised.

"… what people have realised is that travel is intrinsically a part of what makes them healthy human beings…" thus making travel essential.

Theme 4: Risk perceptions related to travel

One participant indicated that she does not think that the risk related to travel has increased but instead the risk of contracting the disease especially since the global scale of the pandemic was novel. There is a certain level of consciousness that global pandemics are now a reality that will require the tourist to be more flexible and adaptable. It was also stated that in the beginning it was indicated that the movement of people is causing the spread of the virus which therefore associated certain risks with tourism. At this point, it is known that one can be a carrier of COVID-19 but be asymptomatic. This narrative did not count in tourism's favour but people realised the value of freedom to travel and to explore. Rather than risk associations at that point in time people realised how important tourism was rather than being terrified to travel.

Safety, with reference the health, is now a major influencer that needs to be managed well over the long term. For example, there was not a major outbreak in the public transport sector and events are slowly opening up again in SA. If tourism spaces open up without major incidents it will create traveller confidence to travel again. Although the country needs to be transparent in their actions,

".. sometimes I think that it is not necessarily always a healthy thing for the country."

The country should be careful in terms of how they communicate certain messages to certain audiences.

Theme 5: The impact of the interventions

- ***Impact on tourists and tourism decisions***

It was stated by all participants that during lockdowns people could not travel which was not understood for the complete industry at the time. It was also indicated by the participants that vaccines should not be mandated, and people need to exercise their human rights. This might, however, lead to a decrease in tourism as people across the world still want to have the freedom to choose whether they want to take the vaccine or not. On the other hand, one of the participants stated that the vaccines improve a feeling of safety and might lead to higher tourist numbers. The interventions are becoming lighter, and it is important to remember that tourists will not travel to SA if it is too difficult to access.

- ***Impact on supply and their businesses***

There are a number of different opinions on this theme. It was indicated that the Tourism Relief Fund was there to assist businesses that experienced major challenges, but support was limited. Most of the participants indicated that the Tourism Relief fund was a good idea but poorly executed. One participant stated that the UIF saved the tourism industry and although the process was a nightmare it kept the food on the table. TERS was however covered over a short period and not for the duration of the pandemic.

The Tourist Guide Fund was effective during times when there were no visitors. This fund was necessary for the freelancers in the industry who does not have an employer contributing to UIF. Although the funding was limited it did help these operators

through difficult times. The fact that the industry has freelance workers was interesting and they were therefore the most vulnerable. The Tourist Guide fund with the help of the Department of Tourism assisted in this regard. Very limited opinions were given on the bank guarantee schemes. It was indicated that a number of businesses benefitted from the R50 000-00 grant from the Department of Tourism as well.

Most of the participants mentioned the lack of support to the business open. Support was given to support staff and pay what needed to be paid, but costs related to sanitising, setting up screens, keeping the social distance etc., were not considered. A number of webinars were held to provide advice and information to the industry. Virtual familiarisation tours were developed. Repurposing was implemented to the benefit of the staff and the companies also participated in fundraising initiatives to contribute to feeding schemes.

Clearly, as a tourism industry, we should be better prepared to deal with situations like this. It was also clear that the interventions were welcomed but the administrative processes linked to these interventions were highly criticised.

Theme 6: Improving the attractiveness of SA during and post crises

For the domestic market:

One of the participants is of the opinion that the measures such as marketing will not trigger domestic demand for tourism. It was also stated that government-funded incentives for domestic tourism will not work as the government is already stretching itself in terms of social relief and welfare. On the other hand, participants stated that measures such as marketing and incentives are extremely important.

Pricing is however now of the biggest challenges for the industry where prices increased significantly over December and this influences travel decisions negatively. One needs to be careful not to under or overvalue the product but be reasonable in the selection of pricing strategies. One might be willing to pay a high price once, but not twice which limits return behaviour and trends. The government-funded incentive is a good idea, but a very limited number of tourism products are owned by the government and from a policy point of view this might be challenging. To spark

domestic travel will require more packages, different target groups such as black females who travel in groups, pay cash and spend during travel.

For the international market:

One of the participants indicated that these measures (vaccines, discounted value packages etc.) would create demand and showcase what South Africa can offer and this should be a collaborative effort. Communication messages should however be curated to reiterate and educate potential tourists on the efforts made by South Africa to create a safe destination. From an international point of view, family packages will make a difference since travelling with children requires continuous spending.

It was also stated that international demand will be triggered by easing travel by reviewing the visa system, bio-safety measures and protocols for establishments (TBCSA as approved by the World Tourism and Travel Council). The change in travel routes creates opportunities but also take away opportunities for tourists to spend their money at different SA locations. Added to this the public transport system is not conducive to travel in South Africa and connectivity is an issue. The messages that are communicated to tourists should be well managed – one needs to be proactive. It was also stated that the government should realise and acknowledge when the problem is bigger than themselves and that support is needed from different sources to improve the situation. Different leadership styles also influence the management of the pandemic. The nature theme should be utilised to attract tourists in the next 2-3 years.

Theme 7: Challenges experienced

- TERS was effective as a strategy but ineffective in the administration of the fund.
- One challenge for businesses working with the government sector was the ability of the government to do payments and work remotely. The industry had to make certain changes to provide a 24-hour service but unfortunately, when it came to payment by the government, the process was slow. When a government official contracted the virus the whole department shut down for 10-14 days.

- The lack of coordinated information through a website (for example) was a challenge. The situation is fluid and constantly changing and information is crucial. A global central repository for COVID-19 protocols which anyone could access anytime with updated information would have made a difference in ensuring travel arrangements are correct. This would have eased the travel process.

Theme 8: Future strategies and plans

One of the participants stated that moving forward will require certain adjustments so that tourists are subjected to a certain level of health and safety (without additional costs). It was indicated that certain measures were implemented at a time when there was a need for that, but one needs to look at the tourism industry differently going forward. Measures around safety will however continue and significant attention is needed to improve the visitor experience and attractiveness of destinations. It was also indicated that it is now time to showcase the wide-open spaces that we have available in South Africa for travel purposes. It was also indicated that demand will be stimulated if prices are reviewed. A bigger focus on the domestic market will ensure stability going forward. One should utilise the nature-based tourism product as a key attraction going forward.

Messaging is very important – negative perceptions pertaining to South Africa need to be changed. Marketing of South Africa needs to continue at all costs – one needs to remind the tourists of SA and its offerings. One participant however disagreed with this and indicated that marketing is not a critical aspect during times of crisis. Multi-stakeholder participation in the tourism sector strategy is critical. A huge responsibility lies with the municipalities who must ensure that the tourism offering is on standard and that they have the right human resources to manage the tourism industry. It is important that South Africa review compliance and make it easier for South Africans to do business.

From a business point of view, it was stated by a number of participants that from the government side, relief funds can be allocated to support businesses. It is however needed for businesses to re-invent themselves and rescale their workforce. Participant 4 stated that there were a number of training courses (still continuing) provided to small

and medium-sized enterprises to assist with the management of their businesses. For example, re-packaging of tourism experiences. It was (still is) also important to keep the morale of the business owners high during difficult times. Participant 6 stated the Business Survival Assistance would have made a difference, especially for those that did not have an income at all. These businesses had to retrench people and unfortunately, the good people in the tourism industry found other jobs and the industry will not get them back. There is a need for individual trauma counselling – this virus created national trauma and people do not recognise that – programme that staff and businesses can participate in. A robust crises communication strategy and process is needed.

8.3 Quantitative results

8.3.1 Socio-demographic profile of respondents

The socio-demographic profile of the respondents that participated in the quantitative research is provided below:

Table 5: Socio-demographic profile of respondents

Socio-demographic variable	**Frequency (*n*=584)**
Gender	Male (61%); Female (39%)
Age	25-34 (56%); 35-44 (25%)
Qualifications	Bachelor's Degree (67%); Postgraduate Degree (13%)
Marital status	Married (69%); Single (26%)
Economic activity	Employed in the private sector (60%); Self-employed (21%)
Travel companion(s)	Family (Adults & children) – (32%); With my partner (31%)
Income	Above-average income (38%); Same as average income (32%)

Travel to SA	• I would consider visiting South Africa as a tourist someday in the future (56%) • I have travelled to South Africa before (31%) • I have considered visiting South Africa as a tourist before, but I decided not to (8%) • I would never travel to South Africa for tourism (5%)
Prior international travel	More than once (43%); Once (41%); None, I am yet to travel as a tourist (16%)
Most influential media channels	The internet (40%); Social media (40%)
International travel in the near future	Yes (95%); No (5%)
Domestic travel in the near future	Yes (93%); No (7%)
Willing to pay for SA trip?	$3 001 – $4 000 (26%) $4 001 – $5 000 (21%) $5 001 – $6 000 (18%)

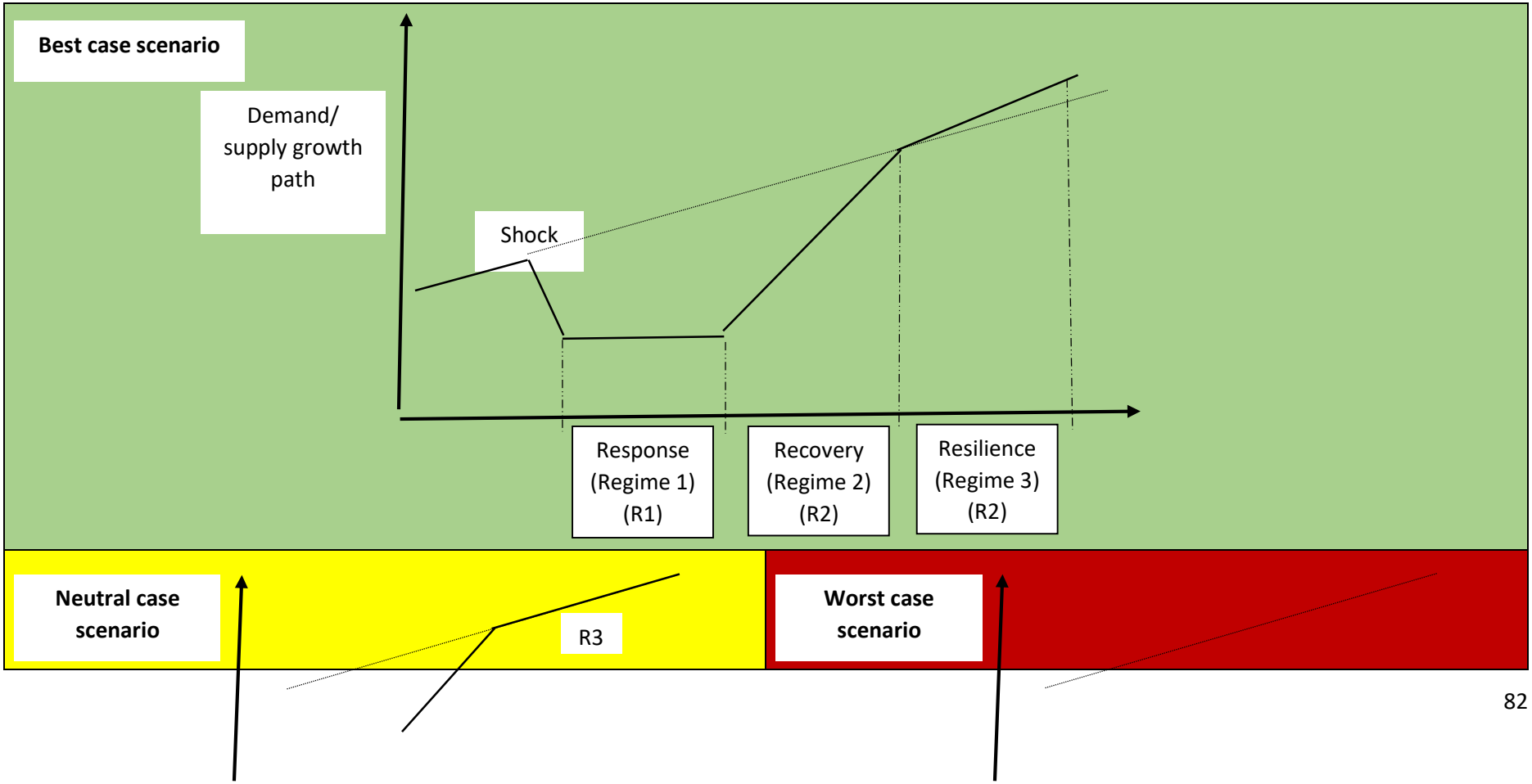
8.3.2 Tourism Resilience Model for South Africa

The Tourism Resilience Model for South Africa is based on two phases. In phase one attention is given to response and recovery. In phase two attention is given to resilience.

Table 6: Phase 1: From Response to Resilience

Building back better *Post shock approach* 		**Response** *Immediately when faced with shocks*	**Recovery** *Interventions bring pre-shock status or better*	**Resilience** *Anticipates, resists, adapts and transforms when faced with a shock*
Tourism Demand	**Variables:** 1. Income 2. Price (transport cost and cost of living at destination cost) 3. Exchange rate 4. Trade openness 5. Population size 6. Marketing 7. Country attractiveness 8. Repeated visits 9. Seasonality 10. Legal frameworks	**Regime 1** Immediate response to COVID-19 significantly dropped the demand of tourism, e.g.: - Legislating the Disaster Management Act, 2002 (Act No. 57 of 2002) and operating on level 5. - Restraining policy environment	**Regime 2** Health measures to make it safe to travel again, e.g.: - vaccination - social distancing - quarantining and isolating Institutional measures to boost demand included: - e-visa programme for priority tourism markets - informative marketing	**Regime 3** Prioritising regional cooperation to tap into travelling who embark on once-off regional trips. Product diversification to improve demand.
Tourism supply	**Variables:** 1. Natural resource & environment 2. Build environment 3. Spirit of hospitality 4. Operating sectors (e.g. accommodation, tourism services, attractions,	**Regime 1** Protecting supply, e.g.: - R200 billion COVID-19 facility for businesses in different sector and R200 million Tourism Relief Fund.	**Regime 2** Reviewing and transforming the tourism policy and institutional support measures to tourism suppliers.	**Regime 3** Developing and harnessing competitive and comparative advantages associated with the innovation and technology-based solutions impacting tourism supply.

	transportation, food and beverage, adventure creation, travel guide, events and conferences) 5. Tourism financial rescue packages 6. Legal frameworks	- creation of a solidarity fund providing seed capital of R150 million. - providing a tax subsidy of up to R500 per month for the next four months for private sector employees earning below R6,500 a month	Supply beginning to respond to demand and vice-versa.	Stimulation of capital investment.



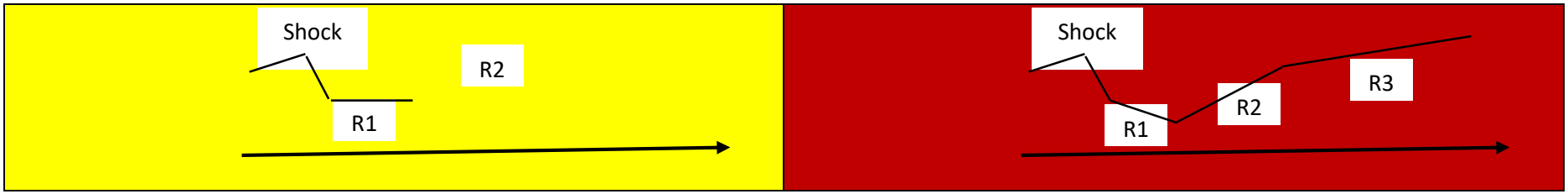


Figure 22: Schematic Scenarios of Phase I

Econometric Model Specification

Given the RRR-regime that South Africa has for building the tourism sector back better, the econometric model of the study follows a Markov-Switching Autoregression (MS-AR) as proposed by Hamilton (1989), having followed the works of Lindgren (1978). MS-AR allows the study to consider the three regimes of BBB in SA, and how (frequent) they switch from one state to the other (i.e. from the state brought about by a shock to its preexisting state or better/worse). The quicker the switch, the more resilient will be the tourism sector.

Consequently, the three regime-switching model specification is as follows:

$$\Delta y_t = \alpha_{s_t} + \vartheta_{R1}(y_{R1} - y_{shock}) + \vartheta_{R2}(y_{R2} - y_{R1}) + \vartheta_{R2}(y_{R3} - y_{R2}) + \boldsymbol{\varepsilon_t}$$

where $\varepsilon_t \sim i.i.d\ N(0, \delta^2_{s_t})$ and the variance of the disturbance term is assumed to be state dependent on the each of the three RRR-regime. Thus, R1, R2 and R3 are modelled as switching regimes of the stochastic process generating demand or supply.

We estimate the probability that one regime transitions to another as follows:

	R1	R2	R3
R1	$p_{R1,R1}$	$p_{R1,R2}$	$p_{R1,R3}$
R2	$p_{R2,R1}$	$p_{R2,R2}$	$p_{R2,R3}$
R3	$p_{R3,R1}$	$p_{R3,R2}$	$p_{R3,R3}$

The transitioning probabilities are depended on the immediate previous prevailing regime and independent of the one before the immediate previous prevailing regime such that:

$$p_{R1,R1} = \Pr(R1|shock)$$

$$p_{R1,R2} = \Pr(R2|R1) = p_{R2,R1} = p_{R2,R2}$$

$$p_{R1,R3} = \Pr(R3|R2) = p_{R2,R3} = p_{R3,R1} = p_{R3,R2} = p_{R3,R3}$$

The nearer the probability is to one the longer it takes to shift to the next regime and the less resilient will be the tourism sector. The ability of a tourism sector to bounce back to its pre-existing steady demand and/or supply growth path following a shock demonstrates its resilience. The literature review and key informant interviews have shown that there are two phases that the tourism sector would typically pass through before getting into the phase of showing if indeed there is any resilience. These two phases are the response phase, dubbed as Regime (R1) in figure 22, and the recovery

phase, dubbed Regime (R2). The phase that proves the resilience of the tourism economy is the third stage and is dubbed Regime (R3).

When a shock such as COVID-19 strikes, both demand and supply are destabilized and this is shown by a drop away from their growth path. Though presented schematically as linear, the demand and supply growth path, as well as their drastic decrease following a shock, can be non-linear. Under the best-case scenario, the tourism economy bounces back not only better but quicker too. Thus, at R1, when government responses relate to implementing measures to protect supply by cushioning suppliers and/or workers from the devastating effects of the shock. Under the best-case scenario, implemented measures quickly halt the decline in supply such that the phase of recovery (R2) sets in. The R2 phase has supplying now getting demand and this increases the growth rate of the sector at an increasing pace. Consequently, it is a phase that is expected to have the steepest upward curve as the tourism economy gravitates towards its pre-existing growth path before the shock. The R1 and R2 of the best-case scenario and of the neutral case scenario are expected to be similar. However, at the R3 phase, the neutral case scenario has the tourism sector restoring its previous demand and supply growth rates while the best-case scenario has the tourism sector becoming even better than the growth rates before the shock. However, the growth rate will now be increasing at a decreasing rate. This is all unlike in the worst-case scenario where the institutional responses are not enough to halt the impact of the shock, leading to a weak recovery and eventually to demand and/or growth that is inferior to that which prevailed before the shock. In sum, a resilient tourism sector bounces back from shock and either resumes or improves, its long-run demand and/or supply growth path.

Phase 2: From Recovery to Resilience

In phase two the country is open for travel and ready to welcome tourists. Although there might still be certain restrictions placed on travel it is now necessary to determine tourists' intention to travel. However, in the case of recovering from a pandemic such as COVID-19, this is not a straightforward answer, and a number of variables will influence this decision. The results might also be different between source markets. It is also important to realise that the travel environment remains fluent and to a certain extent unpredictable which create uncertainties leading to tourists not travelling or

choosing other destinations. Key to managing resilience is data which should inform decision-making!

In phase two attention is first, given to demand as they are key in the resilience process and strategy. In this regard, it is important to determine the push travel motives of tourists (why they want to go on holiday), as well as their level of awareness, association and interest in South Africa, also known as brand equity. Without a certain level of brand equity and a need to travel South Africa will not be an attractive option to choose. Secondly, on a Macro 1 level, it is critical to have information related to the perceived country image, the place brand dimensions, the perceived risk levels of travel and the international tourism risk perceptions. Currently, these macro 1 aspects can serve as mediators in the decisions to either travel or not travel to South Africa. Therefore, a tourist might want to travel and be interested in South Africa but may consider the risk levels too high and therefore decide not to travel. In such a case one should focus on specific strategies and marketing material to showcase what is being done in South Africa to keep tourists safe. These strategies might differ from one country to another. Thirdly, on a meso level reference is made to the aspects that can be controlled and changed. South Africa has to adapt its strategies based on the information determined in Macro 1 – if tourists are scared to travel, the country has an opportunity on the meso level to change its interventions or to make people more aware of the interventions and how it is applied. Fourthly, the media and marketing profile is critical in decision-making. In this case, it is not just about showcasing the tourism product of South Africa but also how the pandemic is managed and which mitigation strategies are applied (see Table 7 for the operationalisation of the variables).

Table 7: Operationalisation of variables

Construct	Dimensions	Definition	Relevant sources
INTERNATIONAL DEMAND: The willingness and ability of consumers to buy different amounts of a tourism product at different prices during any one period. The demand for any tourism good or service is influenced by numerous quantifiable and non-quantifiable factors.[1] (Dwyer, Forsyth & Dwyer, 2020)	**Push travel motives**	Tourists travel or need to travel because they are pushed by their internal forces. These forces are intangible, or they express the internal desires of travellers. For example, the need for relaxation, adventure, prestige.	Baloglu & Uysal (1996)
	Level of awareness	The strength of the brand's presence in the mind of the tourist along a continuum.	Aziz & Yasin, (2010); Basaran, (2016); Kladou & Kehagia (2014); Martín, Herrero & Salmones (2019)
	Level of association	A reflection of tourists' perceptions, including perceptions of values, quality, feelings and brand personality.	
	Level of interest	The level of tourist interest or intrigue in the destination and the level of curiosity to inquire or learn more.	
MACRO I: Multi-stakeholder country management policy and the global environment resulting in the organic image and perceptions held of South Africa. These are tourism and non-tourism related dimensions that South Africa has very little to no control over.	**Perceived country image**	A subjective stakeholder attitude towards a nation and its state, comprising specific beliefs and general feelings in functional and normative dimensions.	Buhmann (2016)
	Place brand dimensions	The multi-dimensional cognitive associations that consumers utilize as reference points for information symmetry in consumptive decision-making.	Matiza & Slabbert, (2020a)
	Perceived risk of international travel & tourism activity	Perceived risk of international travel and tourism activity in South Africa.	Matiza & Slabbert, (2020b)
	International tourism risk perception	International tourists' perception of uncertainty and potential adverse outcomes resulting from the consumption of travel and tourism offerings based on perceived psychological, social, physical and financial risk, respectively.	Matiza (2020)
MESO: Country and tourism market level that is characterized by	**Pull travel factors**	Pull factors include tangible resources that determine the attractiveness of the destination, such as landscapes, beaches, and historical	Baloglu & Uysal (1996)

consistent adaptation to threats, risk and vulnerabilities of the tourism sector.		resources. These external characteristics of a destination that attract tourists when making their destination choice.	
	Pharmaceutical & non-pharmaceutical Interventions	The perceived effectiveness of pharmaceutical and non-pharmaceutical interventions associated with the COVID-19 pandemic.	Liu, Schroeder, Pennington-Gray & Farajat, (2016)
MACRO II: Multi-stakeholder destination response via various media platforms and marketing strategies to elicit an induced perception of South Africa as a tourism destination.	**International media & marketing profile**	The influence of South Africa's tourism's media and marketing profile - which is where potential domestic tourists derive the information which they utilise as heuristic cues in their decision-making.	Fuchs & Reichel (2011)
INTENTION TO TRAVEL		The intention to travel internationally to South Africa in the near future	Law (2006); Olya & Al-ansi (2018); Wang (2017)

[1] Dwyer, Forsyth & Dwyer (2020)

Based on this discussion the following hypotheses apply:

Hypotheses

The model will test the following hypotheses which will influence resilience strategies.

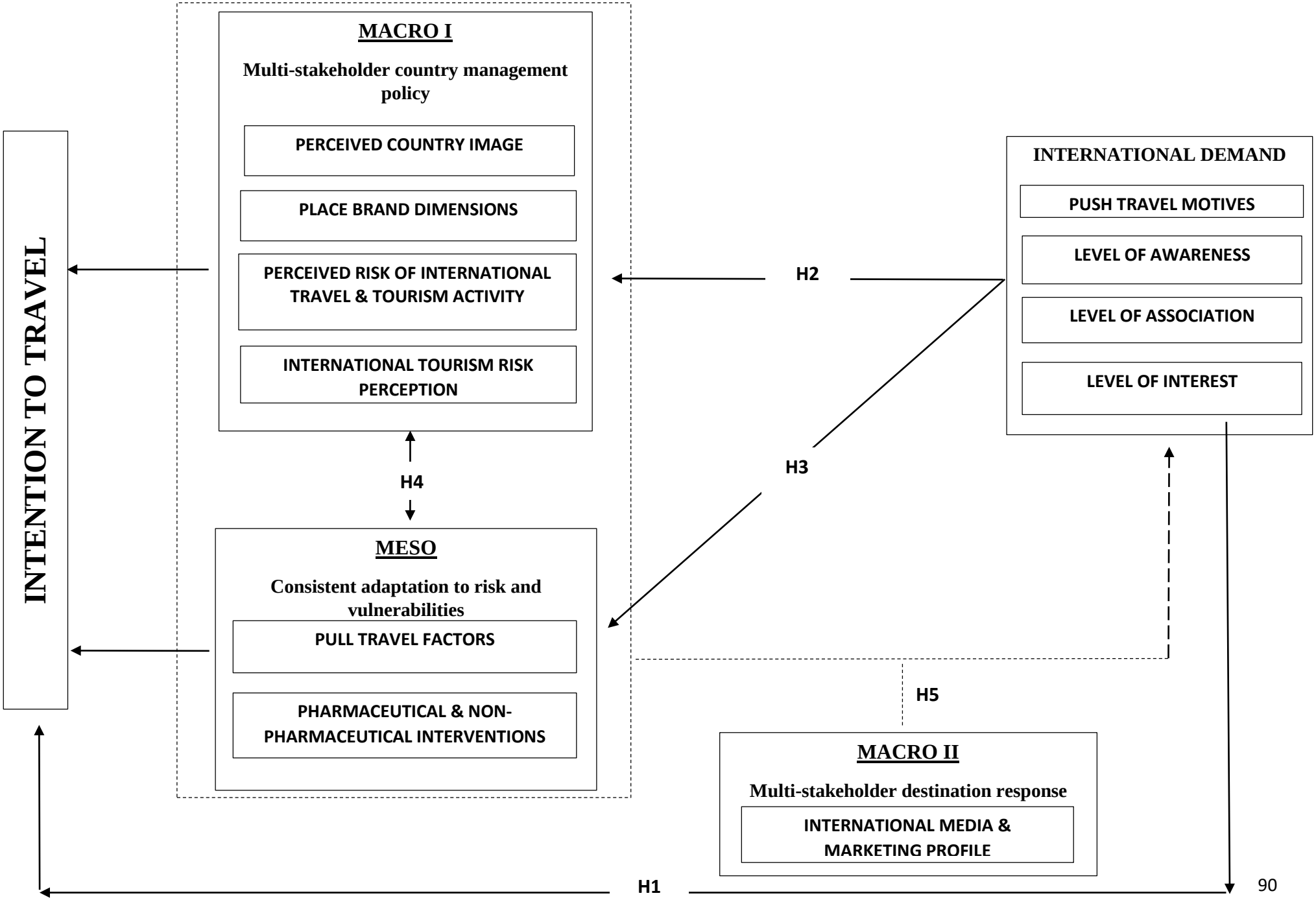
H1: International demand factors directly influence tourists' intention to travel to South Africa.

H2: Macro I factor(s) mediate the relationship between international demand and intention to travel to South Africa.

H3: Meso factor(s) mediate the relationship between international demand and intention to travel to South Africa.

H4: There is a bi-directional relationship between South Africa's MACRO I and MESO factors.

H5: South Africa's MACRO II factor **[**international media & marketing profile] moderates the relationship between MACRO I and MESO factors and intention to travel to South Africa.


MACRO I
Multi-stakeholder country management policy
PERCEIVED COUNTRY IMAGE
PLACE BRAND DIMENSIONS
PERCEIVED RISK OF INTERNATIONAL TRAVEL & TOURISM ACTIVITY
INTERNATIONAL TOURISM RISK PERCEPTION
INTERNATIONAL DEMAND
PUSH TRAVEL MOTIVES
LEVEL OF AWARENESS
LEVEL OF ASSOCIATION
LEVEL OF INTEREST
INTENTION TO TRAVEL
H2
H3
H4
MESO
Consistent adaptation to risk and vulnerabilities
PULL TRAVEL FACTORS
PHARMACEUTICAL & NON-PHARMACEUTICAL INTERVENTIONS
H5
MACRO II
Multi-stakeholder destination response
INTERNATIONAL MEDIA & MARKETING PROFILE
H1

Validation of the tourism resilience model

Based on the quantitative data collated for the USA and Brazil the model was assessed and analysed.

RESULTS PART 1

Note: The results from the American and Brazilian samples are an illustration of the data that can be extracted from the model and its utility. Part 1 is the exploratory aspect of the study, whereby Exploratory Factor Analysis reduces the data in discernable constructs/dimensions that can be easily interpreted, as well as be further analyzed to establish key inferential relationships. Part 2 is the mediation aspect of the model to establish the influence of intervening factors on travel intention. In this case we utilize the American and Brazilian samples to establish tourist's decision-making.

Table 8: Socio-demographic Profile – USA & Brazil

Table 9: PCA and EFA – Brazil Market

Socio-demographic variable		USA			BRAZIL				
Factor	**Items**	**Frequency (n=223)**	**Eigenvalue (EV)**	**Variance (%)**	**Frequency (n=140)**	**Factor Loading (>.50) Min**	**Max**	**Cronbach Alpha (α)**	**Mean ($\bar{x}$)**
Gender		Male (61%); Female (39%)			Male (67%); Female (30%)				
Push Travel Motives	PTM1; PTM2; PTM3; PTM4; PTM5		3.219	64.37		.690	.886	.850	4.45
Age		25-34 (53%); 35-44 (27%)			25-34 (52%); 35-44 (20%)				
Brand Equity									
Qualifications		Bachelor's Degree (71%); Postgraduate Degree (15%)			Bachelor's Degree (41%); Postgraduate Degree (19%)				
Brand Equity I	AWS1; AWS2; AWS4; ASC1; ASC2; ASC 3; ASC4; INT1		6.947	55.57		.610	.915	.932	4.15
Marital status		Married (85%); Single (13%)			Single (54%); Married (36%);				
Brand Interest	INT2; INT3; INT4		1.295	10.80		.579	.972	.734	3.56
Perceived Country Image		Employed in the public sector (72%); Self-employed (15%)			Employed in the public sector (41%); Self-employed (36%)				
Functional Country Image	FCI1; FCI2; FCI3; FCI4; FCI5; FCI6		6.160	51.33		.635	.928	.889	3.43
Normative Country Image	NCI2; NCI3; NCI4; NCI6		1.230	10.25		.725	.827	.805	3.88
Travel Companions		With my partner (36%); Family (Adults & children) – (28%)			With my partner (34%); Family (Adults & children) – (33%)				
Infrastructure	IMM4; INF1; INF2; INF3; INF4		7.242	45.26		.616	.822	.930	3.38
Governance	GOV1; GOV2; GOV4; IMM3; PEO1		1.675	10.47		.625	.745	.845	3.21
Income		Above average income (36%); Same as average income (31%)			Above average income (44%); Same as average income (32%)				
People	GOV3; PEO2; PEO3; PEO4		1.233	7.708		.613	.744	.878	3.96
Immigration	IMM1; IMM2		1.013	6.332		.820	.854	.816	3.93
Pceived risk of international travel & SA Travel & Tourism activity		• I would consider visiting South Africa as a tourist, someday in the future (45%)			• I would consider visiting South Africa as a tourist someday in the future (72%)				
Safe Travel and Tourism Activities	SFT1; SFT2; SFT3; SFT4; SFT5; SFT6; SFT10	• I have travelled to South Africa before (44%)	5.816	58.16	• I have travelled to South Africa before (16%)	.744	.911	.923	3.49
Prior international travel	SFT7; SFT8	Once (46%); More than once (40%)	1.660	16.60	More than once (56%); Once (26%)	.775	.823	.809	3.15
Most influential media international tourism risk perception channels		Social media (46%); The internet (34%);			The internet (55%); Social media (27%)				

International travel in the near future	PSR1; PSR2; PSR3; PSR4; SCR1; SCR2; SCR3; SCR	Yes (94%); No (6%)	7.745	48.41	.674	.849	.924	2.23
Financial Risk	PHR1; FNR1; FNR2; FNR3; FNR4		2.049	12.81	.595	.788	.846	2.50
Domestic Risk	PHR2; PHR3; PHR4	Yes (96%); No (4%)	1.149	7.181	.786	.846	.790	3.32
Pull travel factors								
future	DAI2; DAI4; DAI6; DAI7; DAI8;		4.851	48.51	.594	.966	.879	4.40
Willingness to pay for SA trip	DAI9; DAI10	$4 001 – $5 000 (33%) $5 001 – $6 000 (23%)						
Leisure Entertainment	DAI1; DAI3; DAI5;	$3 001 – $4 000 (29%) $4 001 – $5 000 (27%)	1.127	11.27	.695	.840	.716	4.00
Pharmaceutical & non-pharmaceutical interventions	PNI1; PNI2; PNI3; PNI4; PNI5	$5 001 – $6 000 (19%)	3.378	67.55	.770	.864	.878	3.76
International media & marketing profile								
Destination Marketing	DMP1; DMP3; DMKT1-DMKT6		5.499	45.82	.546	.857	.867	3.85
Destination Media Profile	DMP2; DMP4; DMP5		1.423	11.86	.613	.891	.748	3.25
Travel Intention	TRV1 -TRV4		3.081	77.03	.822	.903	.900	3.66

Table 10: PCA & EFA – USA Market

Factor	Items	Eigenvalue (EV)	Variance (%)	Factor Loading (>.50)		Cronbach Alpha (α)	Mean ($\bar{x}$)
				Min	Max		
Push Travel Motives	PTM1; PTM2; PTM3; PTM4; PTM5	2.361	47.20	.501	.796	.703	4.03
Brand Equity							

Factor	Items	Eigenvalue (EV)	Variance (%)	Factor Loading (>.50)		Cronbach Alpha (α)	Mean ($\bar{x}$)
				Min	Max		
Brand Equity I	AWS1; AWS4; ASC1; ASC 3; INT1; INT4	4.961	41.34	.511	.722	.744	3.95
Brand Equity II	AWS2; AWS3; ASC2; ASC4; INT2	1.026	8.549	.623	.846	.808	3.82
Perceived Country Image	FCI1; FCI2; FCI3; FCI4; FCI5; FCI6; NCI1; NCI2; NCI3; NCI4; NCI5; NCI6	5.710	47.59	.635	.762	.899	3.81
Place Brand Dimensions							
Governance & Resources	GOV1; GOV2; GOV4; IMM3; IMM4; INF1; INF2; INF3; INF4; PEO1	7.034	43.96	.595	.738	.901	3.70
International Relations	GOV3; PEO3; PEO4	1.288	8.01	.555	.705	.631	3.82
Immigration	IMM1; IMM2; PEO2	1.005	6.28	.516	.837	.693	3.77
Perceived risk of international travel & tourism activity	SFT1-SFT10	5.01	50.14	.629	.780	.889	3.68
International tourism risk perception							
Socio-economic Risk	PSR4; PHR1; PHR3; PHR4; SCR1; SCR2; SCR4; FNR1; FNR2; FNR3; FNR4	8.049	50.31	.507	.825	.930	3.33
Psychological Risk	PSR1; PSR3; SCR3	1.344	8.40	.633	.855	.786	3.56
Physical Risk	PHR2; PHR4	1.001	6.26	.526	.891	.609	3.64
Pull travel factors							
Leisure	DAI1; DAI2; DAI3; DAI5; DAI6; DAI7	4.439	44.39	.557	.796	.789	3.88

Factor	Items	Eigenvalue (EV)	Variance (%)	Factor Loading (>.50)		Cronbach Alpha (α)	Mean ($\bar{x}$)
				Min	Max		
Experiential	DAI4; DAI8; DAI9; DAI10	1.090	10.90	.615	.886	.806	3.95
Pharmaceutical & non-pharmaceutical interventions	PNI1; PNI2; PNI3; PNI4; PNI5	2.596	51.92	.682	.739	.768	3.78
International media & marketing profile	DMP1-DMP6; DMKT1-DMKT6	5.536	46.14	.650	.742	.893	3.73
Travel Intention	TRV1 -TRV4	2.573	64.33	.763	.822`	.815	3.80

Socio-Demographic profile

From the socio-demographic data generated by the model a comparative profile of markets can be compiled.

The typical American respondent is male. Most of the respondents are aged between 25-34 years old and possess a bachelor's degree. Most American respondents are married, employed in the American public sector and typically travel with their partners and family. They earn above-average American income, and while some have travelled to South Africa previously, most indicated they would consider visiting South Africa as a tourist someday in the future. Most of the respondents have travelled internationally at least once prior to the survey, and their travel decisions are mainly influenced by social media. The typical American respondent will travel both domestically and most importantly internationally in the near future. On a trip to South Africa, American respondents are willing to pay between $4 001 – $5 000, and $5 001 – $6 000 respectively. In comparison, most Brazilian respondents are also male and aged between 25-34 years old. Like American respondents, most possess a bachelor's or postgraduate degree, respectively. Unlike American respondents, most Brazilians indicated that they were single. Similar to American respondents, most Brazilians were employed in the public sector, and would normally travel with either their partner or family, respectively, while earning an above-average income. More Brazilians would consider travelling to South Africa for tourism in comparison, however, more Americans indicated having travelled to South Africa before. The internet is the most influential media platform for Brazilian respondents, and most indicated wanting to travel both domestically and internationally in the near future. Brazilian respondents appear to be willing to pay less for a trip to SA compared to American respondents, most willing to pay between $3 001 – $4 000, and $4 001 – $5 000, respectively.

EFA & PCA Results – Brazil and USA

From the data generated by the TRM factors as underlying constructs can be established and compared across markets as illustrate by the EFA & PCA results.

The KMO (>.50) and Bartlett's statistics (p=.000) for all the constructs confirmed the factorability of the data. Table 9 and 10 shows that the PCA and EFA [EV>1; loading coefficient of ≥ 0.5] extracted the dimensions. All the scales were reliable (α >.60)

suggesting internal consistency of the variables, as follows for the USA and Brazilian markets. Table 11 summarises the findings.

Table 11: Comparative Summary of EFA and PCA

	USA Market	**Brazilian Market**
Push Travel Motives	One-factor solution (all items meant to measure motives loaded on the factor). Respondents indicated being motivated by the need to explore and experience different activities and cultures ($\bar{x}$ = 4.11) and have an adventure ($\bar{x}$ = 4.09).	One-factor solution (all items meant to measure motives loaded on the factor). Brazilian respondents rated motives higher than American respondents, could be more motivated than American tourists. Brazilian respondents indicated being motivated by visiting and knowing new places they have not been to ($\bar{x}$ = 4.66), as well as exploring and experiencing different activities and cultures ($\bar{x}$ = 4.52).
Brand Equity	Extracted two dimensions, *Brand Equity I* and *Brand Equity II.* The *Brand Equity I* dimension suggests respondents were influenced by the enjoyment of visiting South Africa ($\bar{x}$ = 4.09) and would be proud to tell people about visiting South Africa for tourism ($\bar{x}$ = 4.00). While the *Brand Equity II* indicates that respondents consider South Africa as well-known to me as a tourism destination ($\bar{x}$ = 3.91) and is a destination that suits their personality ($\bar{x}$ = 3.91)	Extracted two dimensions *Brand Equity* and *Brand Interest. Brand Equity* amongst Brazilian respondents is driven by South Africa being well-known as a tourism destination ($\bar{x}$ = 4.95) and they are enjoying visiting South Africa ($\bar{x}$ = 4.44). While *Brand Interest* is based on their support for the efforts of SA to re-build the tourism industry ($\bar{x}$ = 4.06) and they enjoying talking about South Africa as a tourist destination ($\bar{x}$ = 3.50)

	USA Market	Brazilian Market
Perceived Country Image	Loaded as a single dimension, with American tourists perceiving that SA is a welcoming country ($\bar{x}$ = 4.06) that provides for the safety of citizens and visitors ($\bar{x}$ = 3.86).	Brazilian respondents viewed South Africa's Country image from two perspectives, *Functional Country Image* and *Normative Country Image*. South Africa's *Functional Country Image* is primarily informed by perceptions of South Africa having a globally influential culture ($\bar{x}$ = 3.69) and having a well-functioning infrastructure ($\bar{x}$ = 3.56). South Africa's *Normative Country Image* is primarily informed by South Africa being a welcoming country ($\bar{x}$ = 4.21) and respecting the values of other nations and peoples ($\bar{x}$ = 4.08).
Place Brand Dimensions	Three dimensions were extracted by the factor analysis. (1) *Governance & Resources* had a positive influence ($\bar{x}$ = 3.70) based on policing and safety from crime in South Africa ($\bar{x}$ = 3.80) and control and policy measures by the South African government to manage the COVID-19 pandemic ($\bar{x}$ = 3.79). (2) *International Relations* also had a positive influence ($\bar{x}$ = 3.82) on respondents based on respondent perceptions of the acceptance of foreigners by South Africans ($\bar{x}$ = 3.85) and the common language with South Africa ($\bar{x}$ = 3.84). (3) South Africa's *Immigration* reported an overall positive influence on respondents ($\bar{x}$ = 3.77), primarily based on the friendliness and helpfulness of South Africans ($\bar{x}$ = 3.84), the ease of immigration visa procedures when travelling to South Africa ($\bar{x}$ = 3.72), as well as the visa policy of South Africa towards the USA ($\bar{x}$ = 3.72), respectively.	Brazilian respondents considered four *Place Brand* dimensions, *Infrastructure, Governance* with an overall somewhat influential effect on respondents, as well as *People* and *Immigration* reporting an overall positive influence. (1) *Infrastructure* perceptions were based on perceptions of the availability of efficient basic service utilities in South Africa ($\bar{x}$ = 3.52) and access to affordable medical treatment ($\bar{x}$ = 3.45). (2) South Africa's *Governance* perception is informed by control and policy measures by the South African government to manage the COVID-19 pandemic ($\bar{x}$ = 3.46) and quality of life in South Africa ($\bar{x}$ = 3.40). (3) Perceptions of South Africa's *People* are based on the perceived acceptance of foreigners by South Africans ($\bar{x}$ = 4.14), as well as the friendliness and helpfulness of South Africans ($\bar{x}$ = 4.07). (4) *Immigration* perceptions based on South Africa's visa policy towards Brazil ($\bar{x}$ = 3.96) and the ease of immigration visa procedures when travelling to South Africa ($\bar{x}$ = 3.89)

	USA Market	**Brazilian Market**
Perceived risk of international travel & tourism activity	The perceived risk of travel and tourism in South Africa was a one-factor solution with travel and tourism activity in South Africa being perceived to be safe ($\bar{x}$ = 3.68) overall. Travelling by air to South Africa ($\bar{x}$ = 3.76) and visiting South African attractions most popular with international tourists ($\bar{x}$ = 3.74) were rated highest and considered safe.	Brazilian respondents consider travelling by air to South Africa ($\bar{x}$ = 3.79) and travelling by air within South Africa ($\bar{x}$ = 3.60) as s*afe travel and tourism activities*. While self-drive or private transport ($\bar{x}$ = 3.34), and public transport in South Africa ($\bar{x}$ = 2.76) were perceived to be s*omewhat safe travel and tourism activities.*
International tourism risk perceptions	American risk perceptions were in three dimensions. (1) *Socio-economic Risk* ($\bar{x}$ = 3.33) of which respondents were neutral, based on respondents agreeing that the risk of infectious diseases could influence my decision to travel to South Africa ($\bar{x}$ = 3.52) and considering that travelling to South Africa may be more expensive than travelling to other tourism destinations ($\bar{x}$ = 3.48) American respondents agree that there may be (2) *Psychological Risk* ($\bar{x}$ = 3.56) associated with travel to South Africa considering the thought of travelling to South Africa for tourism may make them me feel uncomfortable ($\bar{x}$ = 3.59) and that people who are important to them (family/close friends/colleagues) would disapprove of my visiting South Africa in the near future. (3) Respondents from this market generally agreed that *Physical Risk* ($\bar{x}$ = 3.64) may be an issue in South Africa, primarily based on the thought of travelling to South Africa for tourism worrying them ($\bar{x}$ = 3.75), as well as the risk of infectious diseases possibly influencing their decision to travel to South Africa ($\bar{x}$ = 3.52).	Brazilian risk perceptions were in three dimensions. (1) *Psycho-Social Risk* ($\bar{x}$ = 2.23) of which respondents rated low, based on travelling to South Africa for tourism causing respondents to experience unnecessary tension ($\bar{x}$ = 2.59), and making them worry ($\bar{x}$ = 2.49). (2) *Financial Risk* on which respondents were neutral based on travelling to South Africa potentially being more expensive than travelling to other tourism destinations ($\bar{x}$ = 2.71) and not travelling to South Africa if the standards of health care in the country were of concern ($\bar{x}$ = 2.59). (3) *Physical Risk* of which respondents were neutral concerning South Africa, based on perceptions of proper sanitation and hygiene in South Africa being more important now than ever ($\bar{x}$ = 3.55) and the risk of infectious diseases influencing their decision to travel to South Africa ($\bar{x}$ = 3.44).

	USA Market	**Brazilian Market**
Pull travel motives	The of American respondents indicate that they were likely to travel to South Africa for *Leisure* ($\bar{x}$ = 3.88) and *Experiential* ($\bar{x}$ = 3.99) tourism typologies. Leisure exploits would likely primarily be motivated by visits to museums, monuments, and historical locations and artefacts ($\bar{x}$ = 3.99), as well as engaging in entertainment activities (sports, theme parks, water parks, casinos, resorts) and visiting locations with beaches (Durban, Cape Town, Port Elizabeth) rated $\bar{x}$ = 3.89, respectively. Experiential motives associated with South African tourism include the likelihood of American tourists visiting national parks, conservancies and nature reserves ($\bar{x}$ = 3.99), and enjoying various natural attractions (mountains, lakes, rivers) rated $\bar{x}$ = 3.97 on the scale of likelihood.	Brazilian respondents indicated they were likely to travel to South Africa for *Natural-Experiential* tourism ($\bar{x}$ = 4.40), influenced by visiting national parks, conservancies and nature reserves ($\bar{x}$ = 4.49) and enjoying various natural attractions such as mountains, lakes and rivers ($\bar{x}$ = 4.48). Brazilian tourists were also likely to engage in Leisure recreational activities ($\bar{x}$ = 4.48) in South Africa, buoyed by engaging in outdoor activities such as quad-biking, hiking, bungee jumping, rafting ($\bar{x}$ = 4.00), as well as engaging in entertainment activities including sports, theme parks, water parks, casinos, resorts ($\bar{x}$ = 4.03).
Pharmaceutical & non-pharmaceutical interventions	Interventions reported a one-factor solution with respondents generally considering South Africa's interventions to be effective. This perception is based on the perceived effectiveness of the digitalisation of travel and tourism services (online booking, automated check-in systems) ($\bar{x}$ = 3.81), South Africa's COVID-19 vaccination program, as well as the vaccination of hospitality and tourism staff, both rated as effective ($\bar{x}$ = 3.79).	Interventions also reported a one-factor solution amongst Brazilin respondents. South Africa's COVID-19 interventions were perceived to be somewhat effective overall ($\bar{x}$ = 3.76), primarily influenced by perceptions of vaccination of hospitality and tourism staff ($\bar{x}$ = 3.90), as well as online travel advisories about how to stay safe prior to and during travel to South Africa ($\bar{x}$ = 3.87).

	USA Market	Brazilian Market
International media & marketing profile	American respondents considered South Africa's media and marketing profile to be quite influential ($\bar{x}$ = 3.87). This was based on the influence of the attractive uniqueness of South Africa compared to other destinations ($\bar{x}$ = 3.84), as well as coverage of South Africa in the media and Generally, sufficient information about South Africa as a tourism destination ($\bar{x}$ = 3.78)	Brazilian respondents were influenced by two media and marketing dimensions. (1) *Destination Marketing* is considered influential ($\bar{x}$ = 3.85) and primarily informed by the attractive uniqueness of South Africa compared to other destinations ($\bar{x}$ = 4.09) and the general availability of sufficient information about South Africa as a tourism destination ($\bar{x}$ = 3.94). (2) *Destination Media Profile* is also considered to be influential ($\bar{x}$ = 3.92), based on social media posts about South Africa ($\bar{x}$ = 4.09) and coverage of South Africa in the media ($\bar{x}$ = 3.87).
Travel Intention	American respondents indicated that they are likely to travel to South Africa ($\bar{x}$ = 3.78), indicating planning to travel to South Africa in the near future ($\bar{x}$ = 3.89) and whenever they have a chance to travel, they will travel to South Africa ($\bar{x}$ = 3.77)	Brazilian respondents indicated a likelihood to travel to South Africa ($\bar{x}$ = 3.66), primarily supported by their likelihood to actively recommend people they know to visit South Africa ($\bar{x}$ = 3.84), and planning to travel to South Africa in the near future.

Significant differences can be determined for the data generated and subjected to EFA and PCA analysis. For instance, there are discernable differences between the travel motives of American (primarily motivated by the need to explore and experience different activities and cultures) and those of Brazilian tourists (primarily motivated by visiting and knowing new places they have not been to). These aspects can be analysed in conjunction with the destination attributes associated with South Africa, where American tourists leisure (visits to museums, monuments, and historical locations and artefacts) and experiential (visiting national parks, conservancies and nature reserves) tourism products to fulfil their needs, while Brazilian tourists would be interested in South Africa based on natural-experiential tourism (influenced by visiting national parks, conservancies and nature reserves) and leisure recreational activities (engaging in outdoor activities such as quad-biking, hiking, bungee jumping, rafting).

RESULTS PART 2

The TRM is geared towards establishing the intervening effect of various factors in the decision-making process of tourists in the event of a crisis such as the COVID-19 pandemic. Part 2 of the results illustrates the mediation analysis and that would be conducted to establish the aforementioned effect. Using the American sample from the pilot study the following results are presented in support and validation of the efficacy of the TRM.

Direct Effect Testing: American Sample

Tables 12 summarises the direct effect statistics based on linear and multiple regressions. Regression analyses determined the following predictions: X of Y (path c); X of M (path a); M of Y (path b). Where the independent variables are **X_1**(Push Motives); **X_2** (Brand Equity I); **X_3** (Brand Equity II). The mediating variables are **M_1** (Country Image); **M_2** (Government & Resources); **M_3** (International Relations); **M_4** (Immigration); **M_5** (Socio-Economic Risk); **M_6** (Psychological Risk); **M_7** (Physical Risk); **M_8** (Safety); **M_9** (Leisure Entertainment); **M_{10}** (Experiential); and **M_{11}** (Interventions). The outcome variable is **Y** (Travel Intention).

Table 12: Direct effect testing – USA Market

	Unstandardised coefficients		Standardised coefficients		
	B	**Std. Error**	***β***	**t-value**	**Sig.**
Path c					
X_1(Push Motives) – **Y** (Travel Intention)	.629	.087	.478	8.084	.000***
X_2 (Brand Equity I) - **Y** (Travel Intention)	.884	.071	.643	12.484	.000***
X_3 (Brand Equity II) - **Y** (Travel Intention)	.779	.049	.728	15.775	.000***
Path a					
X_1 (Push Motives) – **M_1** (Country Image)	-.222	.067	-.209	-3.333	.001**
X_2 (Brand Equity I) – **M_1** (Country Image)	.421	.078	.378	5.387	.000***
X_3 (Brand Equity II) - – **M_1** (Country Image)	.513	.049	.593	10.562	.000***

	Unstandardised coefficients		Standardised coefficients		
	B	**Std. Error**	***β***	**t-value**	**Sig.**
X_1 (Push Motives) – **M_2** (Government & Resources)	-.234	.078	-.196	-3.005	.003***
X_2 (Brand Equity I) – **M_2** (Government & Resources)	.338	.091	.272	3.709	.000***
X_3 (Brand Equity II) – **M_2** (Government & Resources)	.626	.057	.646	11.004	.000***
X_1 (Push Motives) – **M_3** (International Relations)	.183	.085	.163	2.150	.033*
X_2 (Brand Equity I) – **M_3** (International Relations)	.286	.100	.243	2.867	.005**
X_3 (Brand Equity II) – **M_3** (International Relations)	.291	.662	.319	4.684	.000***
X_1 (Push Motives) – **M_4** (Immigration)	.053	.089	.046	.598	.550
X_2 (Brand Equity I) – **M_4** (Immigration)	.353	.104	.293	3.400	.001**
X_3 (Brand Equity II) – **M_4** (Immigration)	.331	.065	.352	5.111	.000***
X_1 (Push Motives) – **M_5** (Socio-Economic Risk)	-.171	.147	-.110	-1.159	.248
X_2 (Brand Equity I) – **M_5** (Socio-Economic Risk)	-.209	.172	-.129	-1.213	.227
X_3 (Brand Equity II) – **M_5** (Socio-Economic Risk)	.559	.107	.269	3.156	.001**
X_1 (Push Motives) – **M_6** (Psychological Risk)	-.180	.136	-.118	-1.320	.188
X_2 (Brand Equity I) – **M_6** (Psychological Risk)	-.226	.159	-.142	-1.417	.158
X_3 (Brand Equity II) – **M_6** (Psychological Risk)	.618	.099	.498	6.215	.000***
X_1 (Push Motives) – **M_7** (Physical Risk)	.335	.142	.226	2.360	.019*
X_2 (Brand Equity I) – **M_7** (Physical Risk)	-.082	.166	-.053	-.493	.622
X_3 (Brand Equity II) – **M_7** (Physical Risk)	-.034	.104	-.029	-.333	.740
X_1 (Push Motives) – **M_8** (Safety)	-.137	.075	-.119	-1.817	.071

	Unstandardised coefficients		Standardised coefficients		
	B	**Std. Error**	***β***	**t-value**	**Sig.**
X_2 (Brand Equity I) – **M_8** (Safety)	.346	.083	.288	3.936	.000***
X_3 (Brand Equity II) – **M_8** (Safety)	.557	.035	.596	10.153	.000***
X_1 (Push Motives) – **M_9** (Leisure Entertainment)	.142	.071	.132	2.006	.046
X_2 (Brand Equity I) – **M_9** (Leisure Entertainment)	.391	.083	.288	3.936	.000***
X_3 (Brand Equity II) – **M_9** (Leisure Entertainment)	.316	.052	.361	6.096	.000***
X_1 (Push Motives) – **M_{10}** (Experiential)	.406	.094	.324	4.319	.000***
X_2 (Brand Equity I) – **M_{10}** (Experiential)	.412	.110	.315	3.744	.000***
X_3 (Brand Equity II) – **M_{10}** (Experiential)	.070	.069	.069	1.024	.307
X_1 (Push Motives) – **M_{11}** (Interventions)	-.033	.082	-.031	-.408	.684
X_2 (Brand Equity I) – **M_{11}** (Interventions)	.300	.096	.269	3.133	.002**
X_3 (Brand Equity II) – **M_{11}** (Interventions)	.374	.060	.431	6.272	.000***
Path b					
M_1 (Country Image) - **Y** (Travel Intention)	.916	.056	.741	16.423	.000***
M_2 (Government & Resources) - **Y** (Travel Intention)	.600	.067	.543	8.986	.000***
M_3 (International Relations) - **Y** (Travel Intention)	.229	.069	.196	3.312	.001***
M_4 (Immigration) - **Y** (Travel Intention)	.124	.067	.109	1.839	.067
M_5 (Socio-Economic Risk) - **Y** (Travel Intention)	-.132	.081	-.155	-1.627	.105
M_6 (Psychological Risk) - **Y** (Travel Intention)	.376	.069	.429	5.331	.000***
M_7 (Physical Risk) - **Y** (Travel Intention)	.050	.071]	.056	.073	.483
M_8 (Safety) - **Y** (Travel Intention)	.817	.054	.714	15.172	.000***

	Unstandardised coefficients		Standardised coefficients		
	B	**Std. Error**	***β***	**t-value**	**Sig.**
M_9 (Leisure Entertainment) - **Y** (Travel Intention)	.780	.063	.637	12.292	.000***
M_{10} (Experiential) - **Y** (Travel Intention)	.547	.060	.521	9.069	.000***
M_{11} (Interventions) **- Y** (Travel Intention)	.664	0.70	.538	9.497	.000***

Statistically significant at *p < .05, **p < .01, ***p < .001

The statistical models and residuals suggested no violations in linear regression relationships Additionally, the VIF and Tolerance statistics confirmed the absence of multicollinearity for the predictive relationships analysed in Tables 5. As shown in Table 5, all paths reported significant effects except **patch a** for **X_1** (Push Motives) – **M_4** (Immigration); **X_1** (Push Motives) – **M_5** (Socio-Economic Risk); **X_2** (Brand Equity I) – **M_5** (Socio-Economic Risk); **X_1** (Push Motives) – **M_6** (Psychological Risk); **X_2** (Brand Equity I) – **M_6** (Psychological Risk); **X_1** (Push Motives) – **M_6** (Psychological Risk); **X_2** (Brand Equity I) – **M_6** (Psychological Risk); **X_3** (Brand Equity II) – **M_7** (Physical Risk); **X_3** (Brand Equity II) – **M_{10}** (Experiential); **X_1** (Push Motives) – **M_8** (Safety); **X_1** (Push Motives) – **M_9** (Leisure Entertainment); **X_3** (Brand Equity II) – **M_{10}** (Experiential); **X_1** (Push Motives) – **M_{11}** (Interventions). These relationships were not considered for further analysis. Additionally, as shown for path b relationships, the inability of the mediators of **M_4** (Immigration); **M_5** (Socio-Economic Risk); and **M_7** (Physical Risk) to statistically predict **Y** (Travel Intention) eliminated the dimensions from further analysis.

Mediation Analysis Results: Country Image

Results from the American market validate the TRM. For illustrative purposes, we investigate the potential intervening effect of tourist perceptions towards South Africa via aspects such as South Africa's *Perceived Country Image* and *Place Brand Dimensions* on the relationship between the country's international tourism demand aspects and tourist's *Travel Intentions*, mediation analysis was conducted using PROCESS Marco (v4.0) in SPSS (v27). Table 13 summarises the results of a simple

mediation, whereby a single intervening effect is being tested such as the case of the intervening effect of *Country Image* in the *Push Travel Motives – Travel Intention*; *Brand Equity I – Travel Intention***;** and *Brand Equity II - Travel Intention* nexuses, respectively.

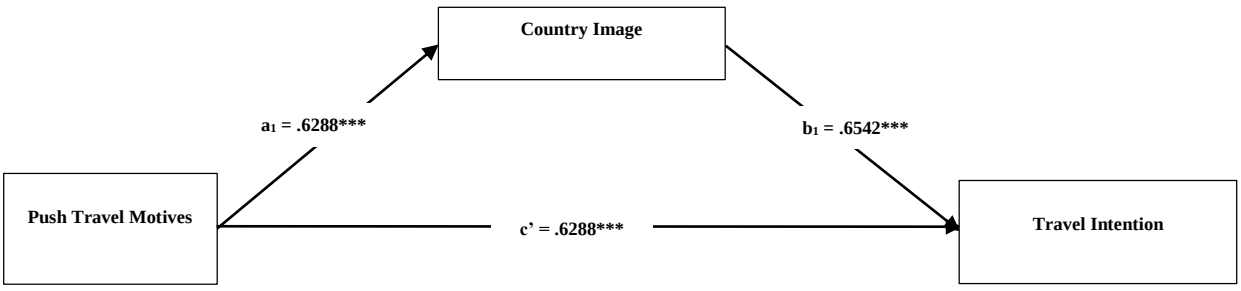
Table 13: Mediation Analysis *Perceived Country Image*

Testing Path	*β*	SE	95% BootCI		t-value	Sig.
			Lower Limit CI	Upper Limit CI		
[1]Push Travel Motives – Country Image - Travel Intentions						
Path c': R^2=.2282, F(1,221)65.3570, *p*=.000						
Push Travel Motives - Travel Intentions	.6288	.0778	.4755	.7820	8.0844	.000***
Path a_1: R^2=.1267, F(1,221)32.0523, *p*=.000						
Push Travel Motives – Country Image	.3559	.0669	.2470	.5108	5.6615	.000***
Path b_1: R^2=.6020, F(2,220)166.3893, *p*=.000						
Country Image - Travel Intentions	.6542	.0563	.6978	.9196	14.3741	.000***
Effect: a_1b_1	.3046	.0838	.6663	.4900		
[2]Brand Equity I - Country Image - Travel Intentions						
Path c': R^2=.4136, F(1,221)155.8614, *p*=.000						
Brand Equity I - Travel Intentions	.8838	.0708	.7743	1.0233	12.4844	.000***
Path a_2: R^2=.3631, F(1,221)125.9957, *p*=.000						
Brand Equity I - Country Image	.0699	.0597	.5523	.7875	11.2243	.000***
Path b_2: R^2=.6102, F(2,220)172.1742, p=.000						
Country Image - Travel Intentions	.6868	.0652	.5583	.8153	10.5331	.000***
Effect: a_2b_2	.4601	.1037	.2676	.6704		
[3]Brand Equity II - Country Image - Travel Intentions						

Testing Path	*β*	SE	95% BootCI Lower Limit CI	95% BootCI Upper Limit CI	t-value	Sig.
Path c': R^2=.5296, F(1,221)248.8534, *p*=.000						
Brand Equity II - Travel Intentions	.7789	.0494	.6816	.8762	15.7751	.000***
Path a_3: R^2=.5306, F(1,221)249.7958, *p*=.000						
Brand Equity II - Country Image	.6307	.0399	.5520	.7093	15.8049	.000***
Path b_3: R^2=.6247, F(2,220)183.1108, p=.000						
Country Image - Travel Intentions	.5513	.0745	.4095	.7032	7.4656	.000***
Effect: a_3b_3	.3509	.0912	.1766	.5284		

Statistical significance: *p <.05, **p < .01, *** p < .001

All the effects reported 95% bias-corrected confidence intervals (CI) based on 5000 bootstrap samples (Preacher and Hayes, 2004) did not include zero between the Lower limit (LL) and Upper Limit (UL); therefore, all the effects were significant. Figure 23 illustrates the statistical results.

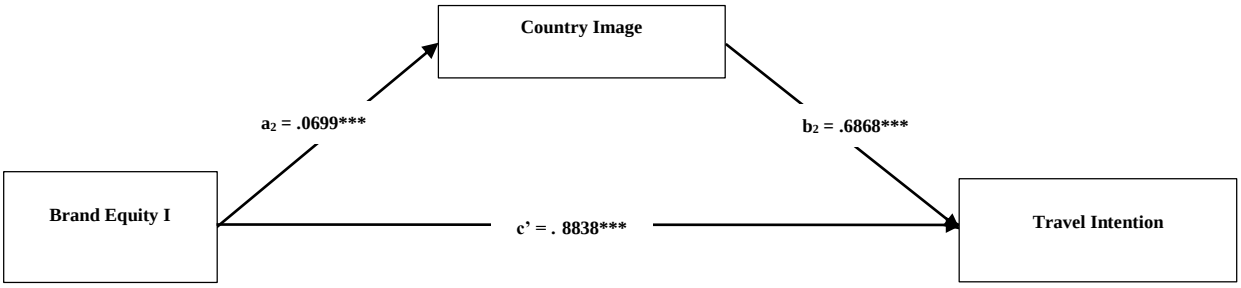


Statistical significance: *p <.05, **p < .01, *** p < .001

Figure 23: Mediating effect testing of country image (1)

Note: The mediating effect of country image in the relationship between the *Push Travel Motives* of American tourists and their *Travel Intentions*. All presented effects are unstandardised; a_1 is the effect of *Push Travel Motives* on *Country Image*; b_1 is the effect of perceived *Country Image* on *Travel Intentions*; c' is the total effect of *Push Travel Motives* on *Travel Intentions*.

As shown in Figure 23 the push travel motives of potential American tourists had a positive direct effect on South Africa's country image (a_1 = .3559, p < 0.001), while South Africa's country image had a positive direct effect on the travel intentions of potential American tourists (b_1 = .6542, p < .001). The model also indicates a significant positive indirect effect (a_1b_1 = .3046, *p* = .000) of potential American tourist's travel motives on their travel intentions via country image, 95% bootstrap CI (LL = .6663, UL = .4900). The Variance Accounted For (VAF) for the model is 49%, indicating partial mediation. This implies that at least 49% of the effect of potential American tourist's travel motives on their travel intentions is explained South Africa's country image.



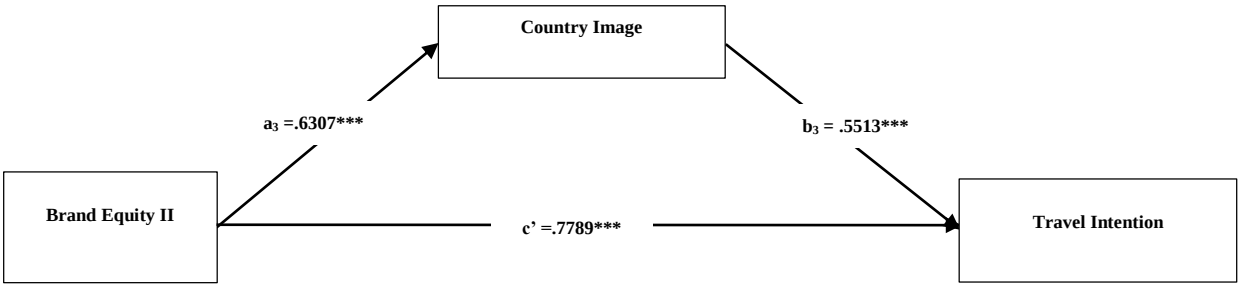
Statistical significance: *p <.05, **p < .01, *** p < .001

Figure 24: Mediating effect testing of country image (2)

Note: The mediating effect of South Africa's *Country Image* in the relationship between the *Brand Equity I* dimensions of American tourists and their *Travel Intentions.* All presented effects are unstandardised; a_2 is the effect of *Brand Equity I* dimensions on country image; b_2 is the effect of perceived *Country Image* on *Travel Intention*; c' is the total effect of *Brand Equity I* dimensions on *Travel Intention*.

As shown in Figure 24 the brand equity (I) of South Africa amongst potential American tourists had a positive direct effect on South Africa's country image (a_2 = .0699, p < .001), while South Africa's country image had a positive direct effect on the travel intentions of potential American tourists (b_2 = .6868, p < .001). The model also indicates a significant positive indirect effect (a_2b_2 = .4601, *p* = .000) of potential American tourist's brand equity (I) perceptions on their travel intentions via country image, 95% bootstrap CI (LL = .2676, UL = .6704). The Variance Accounted For (VAF) for the model is 52%, indicating partial mediation. This implies that at least 52% of the

effect of potential South Africa's brand equity (I) amongst potential American tourists on their travel intentions is explained via South Africa's country image.



Statistical significance: *p <.05, **p < .01, *** p < .001

Figure 25: Mediating effect testing of country image (3)

Note: The mediating effect of *Country Image* in the relationship between the *Brand Equity II* dimensions of American tourists and their *Travel Intentions*. All presented effects are unstandardised; a_3 is the effect of *Brand Equity I* dimensions on country image; b_3 is the effect of perceived *Country Image* on *Travel Intention*; c' is the total effect of *Brand Equity I* dimensions on *Travel Intention*.

As shown in Figure 25 the brand equity (I) of South Africa amongst potential American tourists had a positive direct effect on South Africa's country image (a_3 = .6307, p < .001), while South Africa's country image had a positive direct effect on the travel intentions of potential American tourists (b_3 = .5513, p < .001). The model also indicates a significant positive indirect effect (a_3b_3 = .3509, *p* = .000) of potential American tourist's brand equity (I) perceptions on their travel intentions via country image, 95% bootstrap CI (LL = .1766, UL = .5284). The Variance Accounted For (VAF) for the model is 45%, indicating partial mediation. This implies that at least 45% of the effect of potential South Africa's brand equity (II) amongst potential American tourists on their travel intentions is explained via South Africa's country image.

Parallel Mediation Results: Place Brand

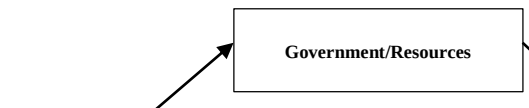
In the case of multiple dimensions such as the *Place Brand Dimensions* the TRM data can be subjected to parallel mediation. Table 14 summarises the results of the parallel mediation illustration of the model using the sample of American respondents.

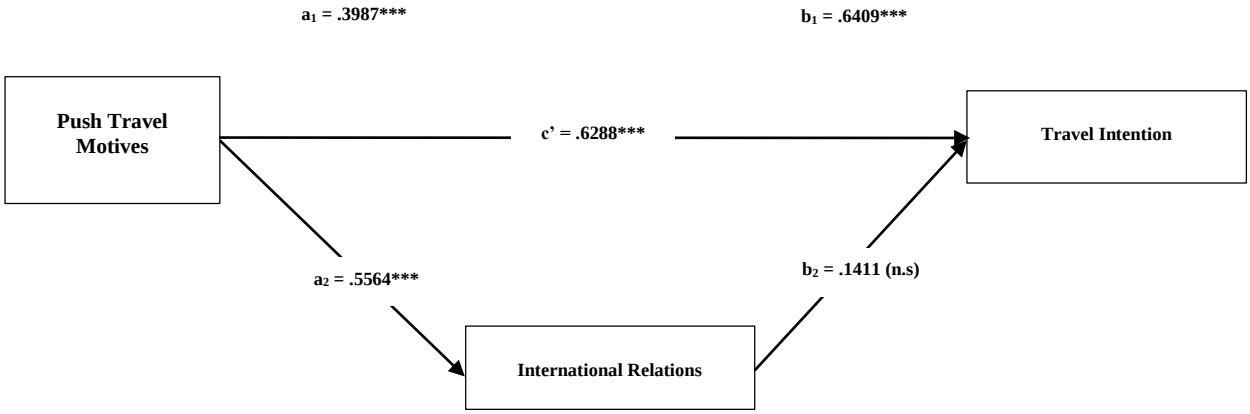
Table 14: Parallel Mediation Analysis *Place Brand Dimensions*

Testing Path	*β*	SE	95% BootCI Lower Limit CI	95% BootCI Upper Limit CI	t-value	Sig.
Push Travel Motives – Government/Resources and International Relations - Travel Intentions						
Path c': R^2=.2282, F(1,221)65.3570, *p*=.000						
Push Travel Motives - Travel Intentions	.6288	.0778	.4755	.7820	8.0844	.000***
Path a_1: R^2=.1010, F(1,221)24.8422, *p*=.000						
Push Travel Motives – Government/Resources	.3987	.0760	.2290	.5285	4.9842	.000***
Path a_2: R^2=.2453, F(1,221)71.8415, *p*=.000						
Push Travel Motives - International Relations	.5564	.0656	.4271	.5868	3.4761	.000***
Path b: R^2=.6041, F(3.219)111.3975, *p*=.000						
b_1: Government/Resources - Travel Intentions	.6409	.0590	.5247	.7571	10.8699	.000***
b_2: International Relations - Travel Intentions	.1411	.0682	.0066	.2755	2.0699	.040
Effect: a_1b_1	.2427	.0599	.1377	.3723		
Effect: a_2b_2	.0785	.0535	-.0115	.1956		
Effect: $a_1b_1 + a_2b_2$	.3046	.0838	.6663	.4900		

Statistical significance: *p <05, **p < 01, *** p < 001

The parallel mediation analysis results (95% bias-corrected CI based on 5000 bootstrap samples) did not include zero between the LL and UL except for path b_2; therefore, Effect: a_2b_2 in the parallel mediation including *International Relations* was insignificant (*p*=.040). However, the total indirect effect was significant. Figure 26 illustrates the results.





Statistical significance: *p <05, **p < 01, *** p < 001

Figure 26: Parallel mediation analysis of governance/Resources and International Relations

Note: The mediating effect of *Government/Resources* and *International Relations* in the relationship between potential American tourist's *Push Travel Motives* and *Travel Intention*. All presented effects are unstandardised; a_1 is the effect of *Push Travel Motives* on *Government/Resources*; b_1 is the effect of *Government/Resources* on *Travel Intention*. a_2 is the effect of *Push Travel Motives* on *International Relations*; b_2 is the effect of *International Relations* on *Travel Intention*. c' is the total effect of *Push Travel Motives* on *Travel Intention* with *Government/Resources* and *International Relations* in the model.

Figure 4 shows that bootstrapping analyses with 5000 samples, revealed a positive total indirect effect of *Push Travel Motives* on *Travel Intention* through *Government/Resources and International Relations* ($a_1b_1 + a_2b_2 = .3046$, $p = 0.000$), 95% bootstrap CI (LL = .6663, UL = .4900), indicating the practical effect significance of the parallel mediation model. The Variance Accounted For (VAF) for the model is 55%, indicating partial mediation. This implies that at least 55% of the effect of *Push Travel Motives* of potential American tourists on their *Travel Intentions* is explained via perceptions of South Africa's *Government/Resources* and *International Relations*.

Mediation analysis: Safety

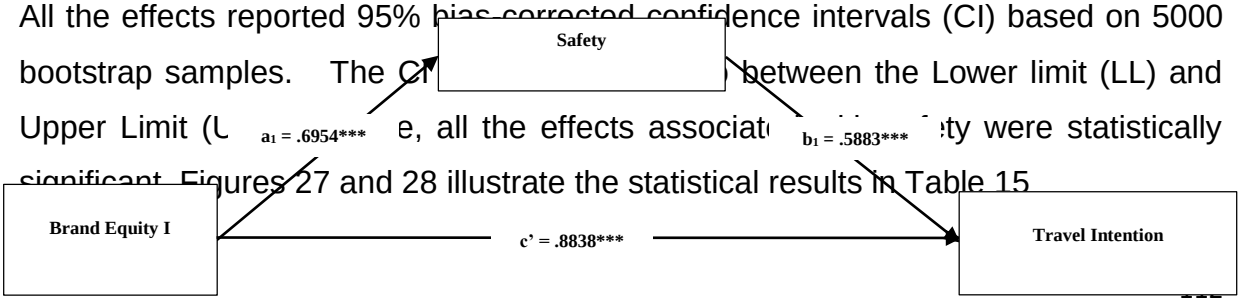
Safety is a single dimension; therefore, simple mediation analysis is applied to the data. Table 15 summarises the simple mediation analyses of the intervening effect of perceived safety of travel and tourism activity in South Africa in the Brand Equity I – Travel Intention, and Brand Equity II – Travel Intention nexus, respectively.

Table 15: Simple Mediation Analysis – Safety

Testing Path	*β*	SE	95% BootCI		t-value	Sig.
			Lower Limit CI	Upper Limit CI		
Brand Equity I - Safety - Travel Intentions						
Path c': R^2=.4136, F(1,221)155.8614, *p*=.000						
Brand Equity I - Travel Intentions	.8838	.0703	.7443	1.0233	2.4844	.0000
Path a_1: R^2=.3350, F(1,221)111.3087, *p*=.000						
Brand Equity I – Safety	.6954	.0659	.5655	.8253	10.5503	.0000
Path b_1: R^2=.5895, F(2.220)157.922, *p*=.000						
Safety - Travel Intentions	.5883	.0606	.4689	.7077	9.7115	.0000
Effect: a_1b_1	.4091	.0916	.2472	.6011		
Brand Equity II - Safety - Travel Intentions						
Path c': R^2=.5296, F(1,221)248.8534, *p*=.000						
Brand Equity II - Travel Intentions	.7789	.0494	.6836	.8762	15.7751	.0000
Path a_1: R^2=.5165, F(1,221)236.0499, *p*=.000						
Brand Equity II – Safety	.6725	.0438	.5862	.7587	15.3639	.0000
Path b_1: R^2=.6053, F(2.220)168.6939, *p*=.000						
Safety - Travel Intentions	.4524	.0697	.3151	.5897	6.4940	.0000
Effect: a_1b_1	.3043	.0864	.1520	.4889		

Statistical significance: *p <05, **p < 01, *** p < 001

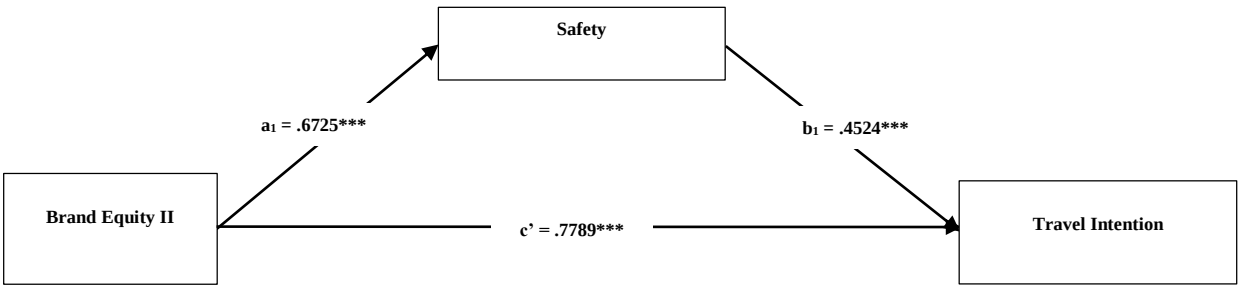
All the effects reported 95% bias-corrected confidence intervals (CI) based on 5000 bootstrap samples. The CI [illegible] between the Lower limit (LL) and Upper Limit (U[illegible]e, all the effects associat[illegible]ety were statistically significant. Figures 27 and 28 illustrate the statistical results in Table 15



Statistical significance: *p <.05, **p < .01, *** p < .001

Figure 27: Mediating effect testing of safety (1)

Note: The mediating effect of *Safety* in the relationship between the *Brand Equity I* of American tourists and their *Travel Intentions*. All presented effects are unstandardised; a_1 is the effect of *Brand Equity I* on *Safety*; b_1 is the effect of perceived *Safety* on *Travel Intentions*; c' is the total effect of *Brand Equity I* on *Travel Intentions*.



Statistical significance: *p <.05, **p < .01, *** p < .001

Figure 28: Mediating effect testing of safety (2)

Note: The mediating effect of *Safety* in the relationship between the *Brand Equity II* of American tourists and their *Travel Intentions*. All presented effects are unstandardised; a_1 is the effect of *Brand Equity II* on *Safety*; b_1 is the effect of perceived *Safety* on *Travel Intentions*; c' is the total effect of *Brand Equity II* on *Travel Intentions*.

As shown in Figure 27 the brand equity (I) of South Africa amongst potential American tourists had a positive direct effect on perceived safety of travel and tourism activity in South Africa (a_1 = .6954, p < .001), while South Africa's safety had a positive direct effect on the travel intentions of potential American tourists (b_1 = .5883, p < .001). The model also indicates a significant positive indirect effect (a_1b_1 = .4091, *p* = .000) of potential American tourist's brand equity (I) perceptions on their travel intentions via safety, 95% bootstrap CI (LL =.2472, UL = .5284). The Variance Accounted For (VAF) for the model is 46%, indicating partial mediation. This implies that at least 46% of the effect of potential South Africa's brand equity (I) amongst potential American tourists on their travel intentions is explained via the perceived safety of tourism activity associated with South Africa. As shown in Figure 6 the brand equity (II) of South Africa

amongst potential American tourists had a positive direct effect on perceived safety of travel and tourism activity in South Africa (a_1 = .6725, p < .001), while South Africa's safety had a positive direct effect on the travel intentions of potential American tourists (b_1 = .4524, p < .001). The model also indicates a significant positive indirect effect (a_1b_1 = .3043, *p* = .000) of potential American tourist's brand equity (II) perceptions on their travel intentions via safety, 95% bootstrap CI (LL =.1520, UL = .4889). The Variance Accounted For (VAF) for the model is 39%, indicating partial mediation. This implies that at least 39% of the effect of potential South Africa's brand equity (II) amongst potential American tourists on their travel intentions is explained via the perceived safety of tourism activity associated with South Africa.

Mediation analysis: Leisure Entertainment

Leisure entertainment is a single dimension from destination attributes; therefore, simple mediation analysis is applied to the data. Table 16 summarises the simple mediation analyses of the intervening effect of leisure entertainment activity in South Africa in the Brand Equity I – Travel Intention, and Brand Equity II – Travel Intention nexus, respectively.

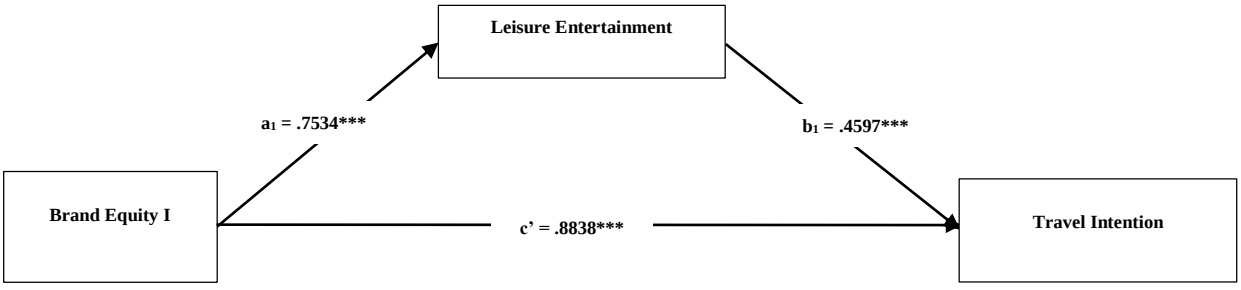
Table 16: Mediation analysis: Leisure Entertainment

Testing Path	*β*	SE	95% BootCI		t-value	Sig.
			Lower Limit CI	Upper Limit CI		
Brand Equity I - Leisure Entertainment - Travel Intentions						
Path c': R^2=.4136, F(1,221)155.8614, *p*=.000						
Brand Equity I - Travel Intentions	.8838	.0708	.7443	1.0233	12.4844	.0000***
Path a_1: R^2=.4497, F(1,221)180.6235, *p*=.000						
Brand Equity I – Leisure Entertainment	.7534	.0561	.6429	.8638	13.4396	.0000***
Path b_1: R^2=.4907, F(2.220)105.9710, *p*=.000						
Leisure Entertainment - Travel Intentions	.4597	.0793	.3015	.6143	5.7707	.0000***
Effect: a_1b_1	.3450	.1041	.1502	.5528		

Testing Path	*β*	SE	95% BootCI Lower Limit CI	95% BootCI Upper Limit CI	t-value	Sig.
Brand Equity II - Leisure Entertainment - Travel Intentions						
Path c': R^2=.5296, F(1,221)248.8534, *p*=.000						
Brand Equity II - Travel Intentions	.7789	.0494	.6816	.8762	15.7751	.0000***
Path a: R^2=.4172, F(1,221)158.2322, *p*=.000						
Brand Equity II – Leisure Entertainment	.5651	.0449	.4766	.6537	12.5791	.0000***
Path b: R^2=.5776, F(2.220)150.4064, *p*=.000						
Leisure Entertainment - Travel Intentions	.3509	.0703	.2125	.4893	4.9969	.0000***
Effect: a_1b_1	.1083	.0715	.0717	.3497		

Statistical significance: *p <05, **p < 01, *** p < 001

All the effects reported 95% bias-corrected confidence intervals (CI) based on 5000 bootstrap samples. The CI did not include zero between the Lower limit (LL) and Upper Limit (UL); therefore, all the effects associated with leisure entertainment were statistically significant. Figures 29 and 30 illustrate the statistical results in Table 16.

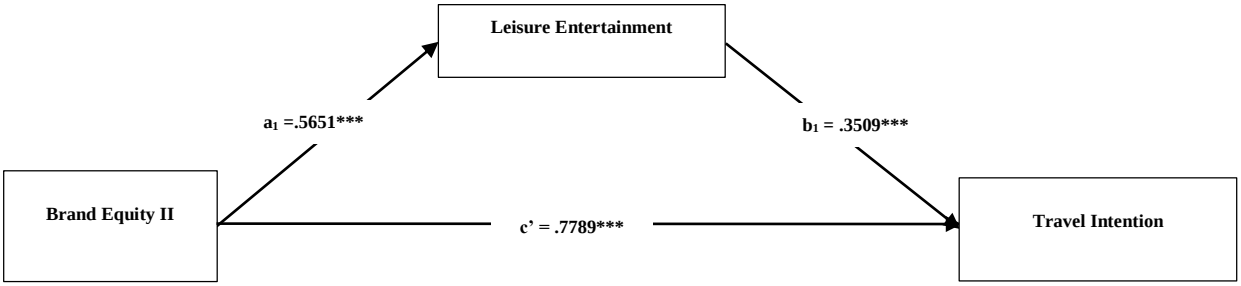


Statistical significance: *p <.05, **p < .01, *** p < .001

Figure 29: Mediating effect testing of Leisure Entertainment (1)

Note: The mediating effect of *Leisure Entertainment* in the relationship between the *Brand Equity I* of American tourists and their *Travel Intentions*. All presented effects are unstandardised; a_1 is the effect of *Brand Equity I* on *Leisure Entertainment*; b_1 is

the effect of perceived *Leisure Entertainment* on *Travel Intentions*; c' is the total effect of *Brand Equity I* on *Travel Intentions*.



Statistical significance: *p <.05, **p < .01, *** p < .001

Figure 30: Mediating effect testing of Leisure Entertainment (2)

Note: The mediating effect of *Leisure Entertainment* in the relationship between the *Brand Equity II* of American tourists and their *Travel Intentions*. All presented effects are unstandardised; a_1 is the effect of *Brand Equity II* on *Leisure Entertainment*; b_1 is the effect of perceived *Leisure Entertainment* on *Travel Intentions*; c' is the total effect of *Brand Equity II* on *Travel Intentions*.

As shown in Figure 29 the brand equity (I) of South Africa amongst potential American tourists had a positive direct effect on the likelihood of engaging in leisure entertainment activity in South Africa (a_1 = .7534, p < .001), while South Africa's leisure entertainment had a positive direct effect on the travel intentions of potential American tourists (b_1 = .4597, p < .001). The model also indicates a significant positive indirect effect (a_1b_1 = .3450, *p* = .000) of potential American tourist's brand equity (I) perceptions on their travel intentions via leisure entertainment, 95% bootstrap CI (LL =.1502, UL = .5528). The Variance Accounted For (VAF) for the model is 39%, indicating partial mediation. This implies that at least 39% of the effect of potential South Africa's brand equity (I) amongst potential American tourists on their travel intentions is explained via the perceived safety of tourism activity associated with South Africa. As shown in Figure 27 the brand equity (II) of South Africa amongst potential American tourists had a positive direct effect on likelihood of engaging in leisure entertainment tourism activity in South Africa (a_1 = .5651, p < .001), while South Africa's leisure entertainment had a positive direct effect on the travel intentions of potential American tourists (b_1 = .3509, p < .001). The model also indicates a significant positive indirect effect (a_1b_1 = .3043, *p* = .000) of potential American tourist's brand equity (II) perceptions on their travel intentions via leisure entertainment, 95%

bootstrap CI (LL = .0717, UL = .3497). The Variance Accounted For (VAF) for the model is 14%, indicating practically insignificant mediation. This implies that at least 14% of the effect of potential South Africa's brand equity (II) amongst potential American tourists on their travel intentions is explained via the consideration of leisure entertainment-oriented tourism activity associated with South Africa.

Mediation analysis: Experiential

Experiential tourism activities is a single dimension from destination attributes; therefore, simple mediation analysis is applied to the data. Table 17 summarises the simple mediation analyses of the intervening effect of experiential tourism activities activity in South Africa in the Push Motives – Travel Intention, and Brand Equity I – Travel Intention nexus, respectively.

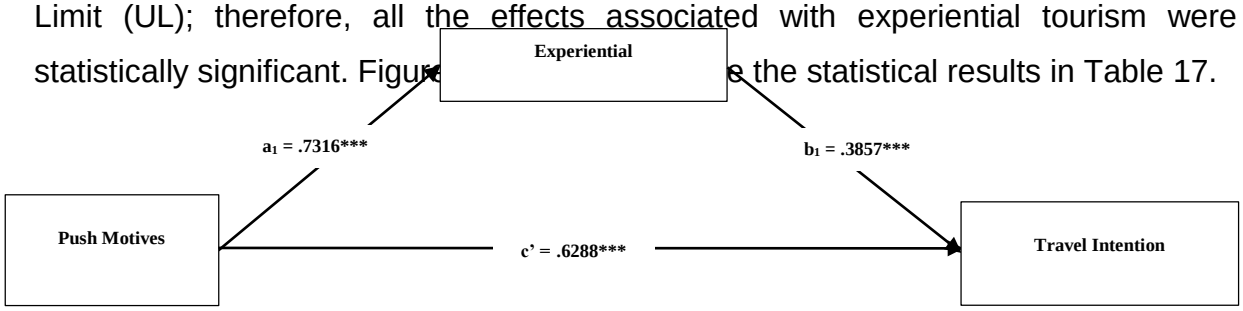
Table 17: Mediation analysis: Experiential

Testing Path	*β*	SE	95% BootCI		t-value	Sig.
			Lower Limit CI	Upper Limit CI		
Push Motives - Experiential - Travel Intentions						
Path c': R^2=.2282, F(1,221)65.3570, *p*=.000						
Push Motives - Travel Intentions	.6288	.0778	.4755	.7820	8.0844	.0000
Path a_1: R^2=.34.15, F(1,221)114.5910, *p*=.000						
Push Motives – Experiential	.7316	.0683	.5969	.8663	10.7047	.0000
Path b_1: R^2=.3169, F(3,220)51.0253, *p*=.000						
Experiential - Travel Intentions	.3857	.0722	.2434	.8279	5.3429	.0000
Effect: a_1b_1	.2822	.0849	.1204	.4510		
Brand Equity I - Experiential - Travel Intentions						
Path c': R^2=.4136, F(1,221)155.8614, *p*=.000						

Testing Path	*β*	SE	95% BootCI		t-value	Sig.
			Lower Limit CI	Upper Limit CI		
Brand Equity I - Travel Intentions	.8838	.0708	.7443	1.0233	12.4844	.0000
Path a_1: R^2=.3495, F(1,221)118.7149, *p*=.000						
Brand Equity I – Experiential	.7728	.0709	.6330	.9126	10.8956	.0000
Path b_1: R^2=.4440, F(1.220)87.8302, *p*=.000						
Experiential - Travel Intentions	.2272	.0655	.0981	.3563	3.4676	.0006
Effect: a_1b_1	.1756	.0771	.0311	.3306		

Statistical significance: *p <.05, **p < .01, *** p < .001

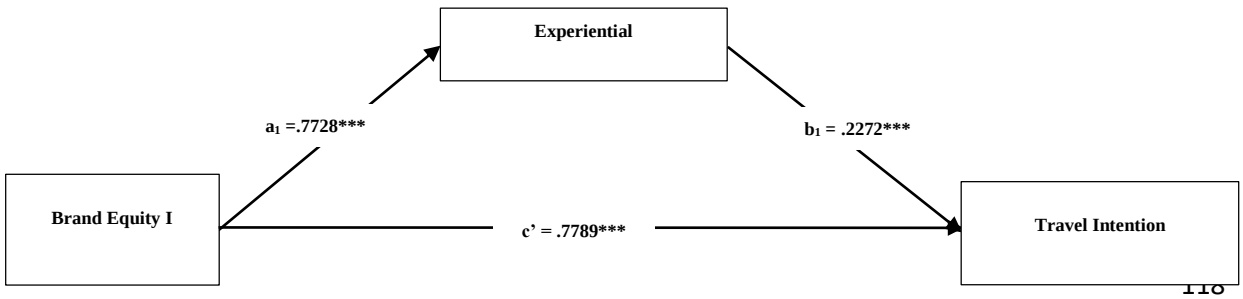
All the effects reported 95% bias-corrected confidence intervals (CI) based on 5000 bootstrap samples. The CI did not include zero between the Lower limit (LL) and Upper Limit (UL); therefore, all the effects associated with experiential tourism were statistically significant. Figure [illegible] the statistical results in Table 17.



Statistical significance: *p <.05, **p < .01, *** p < .001

Figure 31: Mediating effect testing of Experiential (1)

Note: The mediating effect of *Experiential* in the relationship between the *Push Motives* of American tourists and their *Travel Intentions*. All presented effects are unstandardised; a_1 is the effect of *Push Motives* on *Experiential*; b_1 is the effect of perceived *Experiential* on *Travel Intentions*; c' is the total effect of *Push Motives* on *Travel Intentions*.



Statistical significance: *p <.05, **p < .01, *** p < .001

Figure 32: Mediating effect testing of Experiential (2)

Note: The mediating effect of *Experiential* in the relationship between the *Brand Equity I* of American tourists and their *Travel Intentions*. All presented effects are unstandardised; a_1 is the effect of *Brand Equity I* on *Experiential*; b_1 is the effect of perceived *Experiential* on *Travel Intentions*; c' is the total effect of *Brand Equity I* on *Travel Intentions*.

As shown in Figure 31 the push motives of potential American tourists had a positive direct effect on the likelihood of engaging in experiential activity in South Africa (a_1 = .7316, p < .001), while South Africa's experiential tourism activity had a positive direct effect on the travel intentions of potential American tourists (b_1 = .3857, p < .001). The model also indicates a significant positive indirect effect (a_1b_1 = .2822, *p* = .000) of potential American tourist's push motives perceptions on their travel intentions via experiential considerations, 95% bootstrap CI (LL =.1204, UL = .4510). The Variance Accounted For (VAF) for the model is 45%, indicating partial mediation. This implies that at least 45% of the effect of potential South Africa's push motives amongst potential American tourists on their travel intentions is explained via the experiential tourism activity associated with South Africa. As shown in Figure 29 the brand equity (I) of South Africa amongst potential American tourists had a positive direct effect on likelihood of engaging in experiential tourism activity in South Africa (a_1 = .7728, p < .001), while South Africa's experiential tourism attributes had a positive direct effect on the travel intentions of potential American tourists (b_1 = .2272, p < .001). The model also indicates a significant positive indirect effect (a_1b_1 = .1756, *p* = .000) of potential American tourist's brand equity (I) perceptions on their travel intentions via experiential tourism activities, 95% bootstrap CI (LL = .0311, UL = .3306). The Variance Accounted For (VAF) for the model is 20%, indicating small partial mediation. This implies that at least 20% of the effect of potential South Africa's brand equity (I) amongst potential American tourists on their travel intentions is explained via the consideration of experiential-oriented tourism activity associated with South Africa.

Mediation analysis: Interventions

Intervention is a single dimension from destination attributes; therefore, simple mediation analysis is applied to the data. Table 18 summarises the simple mediation analyses of the intervening effect of Interventions in South Africa in the Brand Equity I – Travel Intention, and Brand Equity II– Travel Intention nexus, respectively.

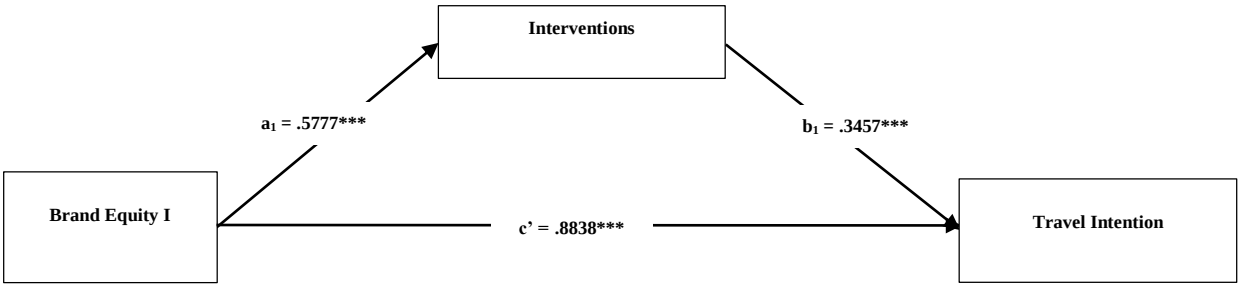
Table 18: Mediation analysis: Interventions

Testing Path	*β*	SE	95% BootCI		t-value	Sig.
			Lower Limit CI	Upper Limit CI		
Brand Equity I – Interventions - Travel Intentions						
Path c': R^2=.4136, F(1,221)155.8614, *p*=.000						
Brand Equity I - Travel Intentions	.8838	.0708	.7443	1.0233	12.4844	.0000
Path a_1: R^2=.2691, F(1,221)81.3608, *p*=.000						
Brand Equity I – Interventions	.5777	.0640	.4515	.7039	9.0200	.0000
Path b_1: R^2=.4709, F(2,220)97.9129, *p*=.000						
Interventions - Travel Intentions	.3457	.0708	.2062	.4851	4.8836	.0000
Effect: a_1b_1	.1997	.0762	.0700	.3703		
Brand Equity II - Interventions - Travel Intentions						
Path c': R^2=.5296, F(1,221)248.8534, *p*=.000						
Brand Equity II - Travel Intentions	.7789	.0494	.6816	.8762	15.7751	.0000
Path a_1: R^2=.3429, F(1,221)115.3434, *p*=.000						
Brand Equity II – Interventions	.5079	.0473	.4147	.6011	10.7398	.0000
Path b_1: R^2=.5488, F(2.220)133.7872, *p*=.000						
Interventions - Travel Intentions	.2106	.0689	.0748	.3465	3.0884	.0025

Testing Path	*β*	SE	95% BootCI		t-value	Sig.
			Lower Limit CI	Upper Limit CI		
Effect: a_1b_1	.1070	.0620	.0042	.2474		

Statistical significance: *p <.05, **p < .01, *** p < .001

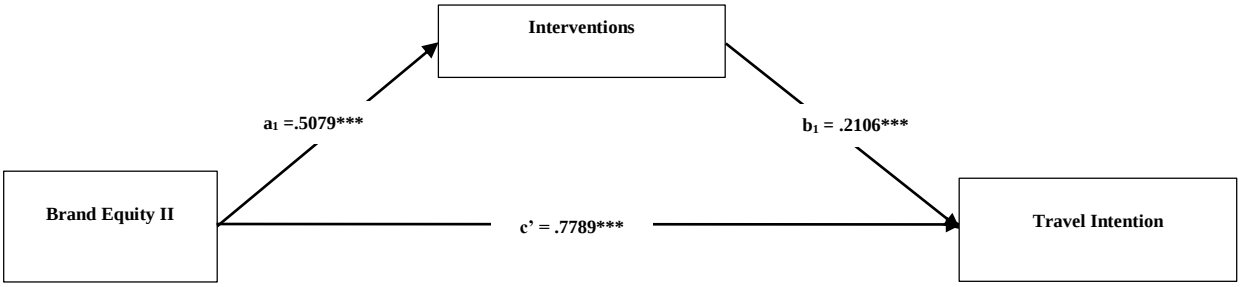
All the effects reported 95% bias-corrected confidence intervals (CI) based on 5000 bootstrap samples. The CI did not include zero between the Lower limit (LL) and Upper Limit (UL); therefore, all the effects associated with interventions were statistically significant. Figures 33 and 34 illustrate the statistical results in Table 18.



Statistical significance: *p <.05, **p < .01, *** p < .001

Figure 33: Mediating effect testing of Interventions (1)

Note: The mediating effect of *Interventions* in the relationship between the *Brand Equity I* of American tourists and their *Travel Intentions*. All presented effects are unstandardised; a_1 is the effect of *Brand Equity I* on *Interventions*; b_1 is the effect of perceived *Interventions* on *Travel Intentions*; c' is the total effect of *Brand Equity I* on *Travel Intentions*.



Statistical significance: *p <.05, **p < .01, *** p < .001

Figure 34: Mediating effect testing of Interventions (2)

Note: The mediating effect of *Interventions* in the relationship between the *Brand Equity II* of American tourists and their *Travel Intentions*. All presented effects are unstandardised; a_1 is the effect of *Brand Equity II* on *Interventions*; b_1 is the effect of perceived *Interventions* on *Travel Intentions*; c' is the total effect of *Brand Equity II* on *Travel Intentions*.

As shown in Figure 33 the brand equity (I) of potential American tourists had a positive direct effect on the interventions in South Africa (a_1=.5777, p<.001), while South Africa's interventions had a positive direct effect on the travel intentions of potential American tourists (b_1 =.3457, p<.001). The model also indicates a significant positive indirect effect (a_1b_1 = .1997, p=.000) of potential American tourist's brand equity (I) on their travel intentions via interventions, 95% bootstrap CI (LL =.0700, UL = .3703). The Variance Accounted For (VAF) for the model is 23%, indicating partial mediation. This implies that at least 23% of the effect of potential South Africa's brand equity (I) amongst potential American tourists on their travel intentions is explained via the COVID-19 interventions associated with South Africa. As shown in Figure 31 the brand equity (II) of South Africa amongst potential American tourists had a positive direct effect on interventions in South Africa (a_1 = .5079, p < .001), while South Africa's interventions had a positive direct effect on the travel intentions of potential American tourists (b_1 = .2106, p < .001). The model also indicates a significant positive indirect effect (a_1b_1 = .1070, *p* = .000) of potential American tourist's brand equity (II) perceptions on their travel intentions via interventions, 95% bootstrap CI (LL = .0042, UL = .2474). The Variance Accounted For (VAF) for the model is 14%, indicating small partial mediation. This implies that at least 14% of the effect of potential South Africa's brand equity (II) amongst potential American tourists on their travel intentions is explained via the COVID-19 interventions associated with South Africa.

Practical Application of the TRM: Individual Market

For illustrative purposes, the data associated with the potential intervening effect of South Africa's Country Image and COVID-19 Pharmaceutical and Non-pharmaceutical interventions on American tourist's intention to travel.

Based on the mediation analyses of the data generated by the TRM the following practical outputs can be discerned for *Country Image*:

- In terms of the influence of South Africa's Country Image in the decision-making process of tourists it can be established that at least 49% of the effect of push travel motives [need to explore and experience different activities and cultures, as well as have an adventure] on the travel intentions of potential American tourists can be explained by perceptions of South Africa being a welcoming country that provides for the safety of citizens and visitors.
- In terms of the influence of South Africa's Country Image in the decision-making process of tourists, it can be established that at least 52% of the effect South Africa's brand equity (I) [the enjoyment of visiting South Africa, and being proud to tell people about visiting South Africa for tourism] on the travel intentions of potential American tourists can be explained by perceptions of South Africa being a welcoming country that provides for the safety of citizens and visitors.
- In terms of the influence of South Africa's Country Image in the decision-making process of tourists it can be established that at least 52% of the effect South Africa's brand equity (II) [South Africa is well-known to me as a tourism destination and is a destination that suits their personality] on the travel intentions of potential American tourists can be explained by perceptions of South Africa being a welcoming country that provides for the safety of citizens and visitors.

Based on the mediation analyses of the data generated by the TRM the following practical outputs can be discerned for *Pharmaceutical and Non-pharmaceutical interventions*:

- In terms of the influence of South Africa's COVID-19 interventions in the decision-making process of tourists it can be established that at least 23% of the effect (Table 10) of potential South Africa's brand equity (I) [the enjoyment of visiting South Africa, and being proud to tell people about visiting South Africa for tourism]

amongst potential American tourists on their travel intentions is explained via the COVID-19 pharmaceutical and non-pharmaceutical interventions [effectiveness of the digitalisation of travel and tourism services; vaccination program; as well as the vaccination of hospitality and tourism staff] associated with South Africa.

- In terms of the influence of South Africa's COVID-19 interventions in the decision-making process of tourists it can be established that at least 14% of the effect of potential South Africa's brand equity (II) [South Africa is well-known to me as a tourism destination and is a destination that suits their personality] amongst potential American tourists on their travel intentions is explained via the COVID-19 pharmaceutical and non-pharmaceutical interventions [effectiveness of the digitalisation of travel and tourism services; vaccination program; as well as the vaccination of hospitality and tourism staff] associated with South Africa.

Practical Application of the TRM: Comparative Analyses

The data from the TRM may also be utilised for comparative purposes on the mediation of specific factors in two markets. The following section illustrates the case of potential American and Brazilian tourists in terms of the intervening effect of South Africa's country image in the push travel motives- travel intention nexus.

Relevant Brazil market data

The direct effect statistics based on linear and multiple regressions. Regression analyses determined the following predictions: X of Y (path c); X of M (path a); M of Y (path b). Where the independent variables are $\mathbf{X_1}$(Push Motives); $\mathbf{X_2}$ (Brand Equity); $\mathbf{X_3}$ (Brand Interest). The specific mediating variables are $\mathbf{M_1}$ (Functional Country Image); $\mathbf{M_2}$ (Normative Country Image). The outcome variable is **Y** (Travel Intention).

Table 19: Direct effect testing – Brazil Market

	Unstandardised coefficients		Standardised coefficients		
	B	**Std. Error**	***β***	**t-value**	**Sig.**
Path c					
X_1(Push Motives) – **Y** (Travel Intention)	.904	.107	.583	8.440	.000***
X_2 (Brand Equity) - **Y** (Travel Intention)	1.054	.072	.782	14.739	.000***
X_3 (Brand Interest) - **Y** (Travel Intention)	.751	.080	.626	9.431	.000***
Path a					
X_1 (Push Motives) – **M_1** (Functional Country Image)	.601	.095	.472	6.296	.000***
X_2 (Brand Equity) – **M_1** (Functional Country Image)	.740	.070	.658	10.555	.000***
X_3 (Brand Interest) - – **M_1** (Functional Country Image)	.549	.070	.558	7.836	.000***
X_1 (Push Motives) – **M_2** (Normative Country Image)	.479	.079	.458	6.046	.000**
X_2 (Brand Equity) – **M_2** (Normative Country Image)	.501	.065	.550	7.729	.000***
X_3 (Brand Interest) – **M_2** (Normative Country Image)	.402	.060	.496	6.706	.000***
Path b					
M_1 (Functional Country Image) - **Y** (Travel Intention)	.844	.075	.093	11.297	.000***
M_2 (Normative Country Image) - **Y** (Travel Intention)	.830	.104	.561	7.963	.000***

Statistically significant at *p < .05, **p < .01, ***p < .001

The statistical models and residuals suggested no violations in linear regression relationships additionally, the VIF and Tolerance statistics confirmed the absence of multicollinearity for the predictive relationships analysed in Tables 19. As shown in Table 19, all paths reported significant effects, hence suggesting the viability of mediation analyses.

Mediation Analysis Results: Country Image

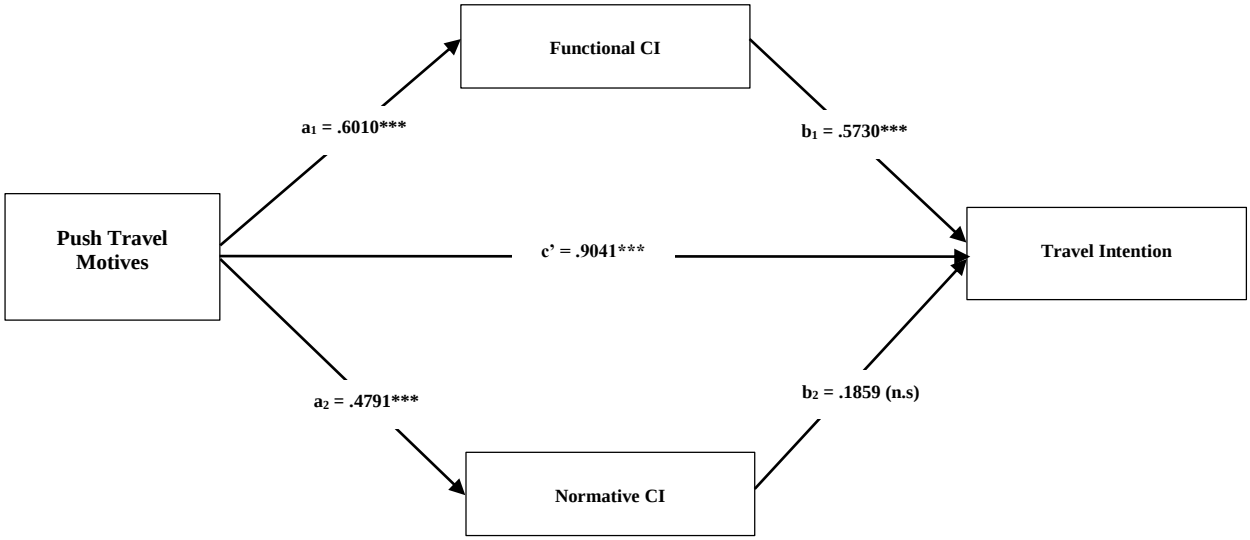
In the case of multiple dimensions such as the *Country Image* [Functional Country Image and Normative Country Image] in the case of Brazil the TRM data can be subjected to parallel mediation. Table 20 summarises the results of the parallel mediation like Table 4 with the difference that Brazilian respondents viewed South Africa's Country Image from two perspectives. Illustration of the model using the sample of Brazilian respondents.

Table 20: Parallel Mediation Analysis Place Brand Dimensions

Testing Path	*β*	SE	95% BootCI Lower Limit CI	95% BootCI Upper Limit CI	t-value	Sig.
Push Travel Motives – Functional CI and Normative CI - Travel Intentions						
Path c': R^2=.3505, F(1,138)71.2389, *p*=.000						
Push Travel Motives - Travel Intentions	.9041	.1071	.6923	1.1159	8.4404	.000***
Path a_1: R^2=.2231, F(1,138)36.6378, *p*=.000						
Push Travel Motives – Functional CI	.6010	.955	.4122	.7897	6.2959	.000***
Path a_2: R^2=.2094, F(1,138)36.5508, *p*=.000						
Push Travel Motives - Normative CI	.4791	.0792	.3224	.6358	6.0457	.000***
Path b: R^2=.5739, F(3.138)61.0487, *p*=.000						
b_1: Functional CI - Travel Intentions	.5730	.0911	.3929	.7532	6.2907	.000***
b_2: Normative CI - Travel Intentions	.1859	.1097	-.0311	.4029	1.6942	.0925
Effect: a_1b_1	.3444	.0808	.1964	.5078		
Effect: a_2b_2	.0891	.0548	-.0072	.2095		
Effect: $a_1b_1 + a_2b_2$	.4334	.0782	.2920	.5991		

Statistical significance: *p <05, **p < 01, *** p < 001

The parallel mediation analysis results (95% bias-corrected CI based on 5000 bootstrap samples) did not include zero between the LL and UL except for path b_2; therefore, Effect: a_2b_2 in the parallel mediation including *Normative CI* was insignificant (*p*=.0925). However, the total indirect effect was significant. Figure 35 illustrates the results.



Statistical significance: *p <05, **p < 01, *** p < 001

Figure 35: Parallel mediation analysis of governance/Resources and International Relations

Note: The mediating effect of *Functional CI* and *Normative CI* in the relationship between potential Brazilian tourists' *Push Travel Motives*and *Travel Intention*. All presented effects are unstandardised; a_1 is the effect of *Push Travel Motives* on *Functional CI*; b_1 is the effect of *Functional CI* on *Travel Intention*. a_2 is the effect of *Push Travel Motives* on *Normative CI*; b_2 is the effect of *Normative CI* on *Travel Intention*. c' is the total effect of *Push Travel Motives* on *Travel Intention* with *Functional CI* and *Normative CI* in the model.

Figure 35 shows that bootstrapping analyses with 5000 samples, revealed a positive total indirect effect of *Push Travel Motives* on *Travel Intention* through *Functional CI and Normative CI* ($a_1b_1 + a_2b_2$ = .4334, *p* = 0.000), 95% bootstrap CI (LL = .2920, UL = .5991), indicating the practical effect significance of the parallel mediation model. The Variance Accounted For (VAF) for the model is 48%, indicating partial mediation. This implies that at least 48% of the effect of *Push Travel Motives* of potential Brazilian tourists on their *Travel Intentions* is explained via perceptions of South Africa's *Functional CI and Normative CI*.

Comparative output

For illustrative purposes, the data associated with the potential intervening effect of South Africa's Country Image in the relationship between Push Travel Motives and American tourist's intention to travel.

Based on the mediation analyses of the data generated by the TRM the following practical outputs can be discerned for *Country Image in the American and Brazilian markets*. In terms of the influence of South Africa's Country Image in the decision-making process of tourists it can be established that:

- At least 49% of the effect of push travel motives [need to explore and experience different activities and cultures, as well as have an adventure] on the travel intentions of potential American tourists can explained by perceptions of South Africa being a welcoming country that provides for the safety of citizens and visitors. While, at least 48% of the effect of push travel motives [visiting and knowing new places they have not been to, as well as exploring and experiencing different activities and cultures] on the travel intentions of potential Brazilian tourists can explained by perceptions of South Africa having a globally influential culture and having a well-functioning infrastructure.

8.4 Conclusions

The following conclusions can be drawn from this study:

- Even before the shock there was a decrease in travel to SA and it was needed to develop a model to address the resilience of the tourism industry
- Added to this South Africa's place on the competitiveness index has worsened as well and new strategies are needed to improve SAs competitive position.
- The need for a multi-stakeholder approach in addressing crises events such as COVID-19 was clear from the interviews.
- Building resilience is a process and not related to a specific event.
- The TRM-model is a useful tool to determine any changes in market perceptions that will guide the marketing efforts to that specific market. In this regard messaging becomes very important.

8.5 Recommendations

The following recommendations can be made:

- That the TRM which is a data-driven decision support model be implemented by the tourism industry to improve decisions that will be based on scientific research.
- That a crises management strategy is developed for the tourism industry that will enable immediate action, no overlapping of activities or waste of valuable resources.
- That data is gathered on a six-monthly basis to build a databank of information related to current and potential source markets.
- Build a platform that provides information during crisis times and ensure that it is updated daily to assist the tourism industry in continuing with their activities.

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