

## CHAPTER 6.3: TOURISM AND HOSPITALITY

### ABSTRACT

Covid-19 has triggered a profound crisis for the global tourism industry, having effectively halted the operations of the tourism sector. In the case of South Africa, the tourism and hospitality sectors have been among those worst affected by the debilitating ramifications of the pandemic. This chapter draws upon a range of sources to investigate South Africa's tourism industry in the Covid-19 environment. It builds on an emerging corpus of international and local research on the impact of the pandemic and responses by government and the sector. Considerable use is made of research studies produced by the Department of Tourism and its partner, South African Tourism, as well as findings from commissioned research for the Department of Tourism undertaken by the University of Johannesburg, which involved 60 primary interviews with tourism businesses (from December 2020 to February 2021) around the impact of the pandemic and their adaptation strategies. Highlighted issues are the uneven geographical impacts of the pandemic, government's fiscal policy responses and non-fiscal recovery measures, and 12 policy recommendations from the University of Johannesburg research study.

Note that any conclusions in this chapter on the strengths and limitations of the Covid-19 response are still preliminary and will be refined based on stakeholder consultations and feedback from readers.

### DISCLAIMER

This Country Report on the measures implemented by the South African government to combat the impact of the Covid-19 pandemic in South Africa (including individual research reports that may be enclosed as annexures) were prepared by various professional experts in their personal capacity. The opinions expressed in these reports are those of the respective authors and do not necessarily reflect the view of their affiliated institutions or the official policy or position of the South African government.

## ACKNOWLEDGEMENTS

This research paper was prepared by:

Name	Designation and affiliation
Prof. Christian M. Rogerson	School of Tourism and Hospitality, University of Johannesburg
Prof. Jayne M. Rogerson	School of Tourism and Hospitality, University of Johannesburg
Ms Kate Rivett-Carnac	Researcher: Tourism and the Green Economy (compiled initial draft)

### *How to cite this report:*

Rogerson, C. M., Rogerson, J. M. & Rivett-Carnac, K., 2021. Tourism and hospitality. South Africa Covid-19 Country Report [Interim draft]. DPME (Department of Planning, Monitoring and Evaluation), GTAC (Government Technical Advisory Centre) & NRF (National Research Foundation), Pretoria: May.

## **ABBREVIATIONS AND ACRONYMS**

BBEEE	broad-based black economic empowerment
PPE	personal protective equipment
TERS	Temporary Employee/Employer Relief Scheme
UIF	Unemployment Insurance Fund

## CONTENTS

Introduction .....	1
Impact of the Covid-19 pandemic on the tourism sector.....	2
Covid-19 restrictions .....	3
Tourism spending.....	4
Geographical impact.....	5
Prospects for domestic tourism .....	7
Government’s fiscal responses .....	7
Tourism Relief Fund.....	7
Tourist Guides Fund .....	8
Temporary Employee/Employer Relief Scheme .....	9
Tourism Equity Fund.....	9
Fiscal transfers to heritage and protected area institutions .....	10
Non-fiscal Covid-19 support and recovery measures .....	10
Department of Tourism’s response strategy .....	10
Health protocols.....	10
Insurance pay-outs .....	10
Industry support schemes .....	11
Repurposing.....	11
Preliminary lessons learnt.....	11
Immediate interventions .....	12
References .....	15

## **LIST OF TABLES AND FIGURES**

Table 6.3.1: Leading source markets for international tourism arrivals, August to December 2020 ....	3
Table 6.3.2: Income from tourism, current prices, March to August 2020 (% change year-on-year) ...	5
Table 6.3.3: Tourism Relief Fund: Approved applications per province and business type .....	8
Figure 6.3.1: South Africa’s 20 most tourism-dependent local governments .....	6

## **LIST OF BOXES**

Box 6.3.1: Tourism’s contribution to the economy .....	2
Box 6.3.2: International tourism flows .....	3
Box 6.3.3: The restaurant sector in the pandemic .....	4
Box 6.3.4: Case studies of selected tourism subsectors .....	5

## INTRODUCTION

Covid-19 has triggered a profound crisis for the global tourism industry, having effectively halted the operations of the tourism sector (Hall et al., 2020; Gössling et al., 2021; Pham et al., 2021; Sharma et al., 2021). The travel and social restrictions around the pandemic severely disrupted tourism – global tourist arrivals declined by 74% during 2020, resulting in falling earnings, business closures, and an estimated 174 million job losses (UNWTO, 2020; WTTC, 2020). Covid-19 is unlike many other disasters and crises that previously affected the tourism sector (Hall et al., 2020), because a return to the ‘normal’ that existed before the pandemic seems unlikely (Brouder, 2020; Sigala, 2020; Gössling et al., 2021). Tourism activities that involve direct contact between consumers and service providers have been worst affected by restrictions on movement and social distancing requirements. Thus, the pandemic strikes at the very DNA of hospitality – social distancing is the antithesis of what one traditionally expects from hospitality and tourism (Garrido-Moreno, et al. 2021). Indeed, the very essence of hospitality is to create unique experiences, often based on closeness with customers and personalised interactions.

Much research has been done on the impact of Covid-19 on the tourism and leisure industries (Kwok & Koh, 2021). Some tourism scholars suggest its catastrophic disruption of consumer demand and supply chains represents a ‘turning point’ for the global tourism industry (Bianchi, 2020; Sigala, 2020). ‘In contrast to previous disruptions, whether brought about by terrorism, natural disasters, financial crises or indeed previous pandemics, the outbreak of the Covid-19 pandemic has precipitated an unprecedented shutdown of travel and tourist destinations on a truly global scale’ (Bianchi, 2020:80). For tourism businesses, Covid-19 ‘has been one of the most impactful and tragic pandemics of modern times’ (Assaf & Scuderi, 2020:731). Strategies to flatten the curve of the pandemic, such as lockdowns, stay-at-home orders, social distancing or travel and mobility restrictions, have brought about the temporary (and increasingly permanent) closure of many tourism establishments (Gursoy & Chi, 2020).

Saarinen & Wall-Reinius (2021) identify two narratives or schools of thought on the impact of Covid-19 on the tourism sector. Both highlight the seriousness of the pandemic for global tourism, but they differ on what comes or should come next.

- The *resilience school of thought* stresses the historical capacity of the tourism sector to adapt to shocks, including the global financial crisis, SARS, and natural events such as earthquakes or tsunamis (Saarinen & Wall-Reinius, 2021:145). The emphasis is upon the sector’s capacity to return to pre-crisis growth paths. This perspective is projected by much of the tourism industry and most national governments, including the Department of Tourism in South Africa and South African Tourism.
- The *readjustment school of thought* emphasises the need to rethink the ‘growth at all cost and volume at all cost’ path for tourism that has dominated in recent years and contributed to the current crisis (Saarinen & Wall-Reinius, 2021:146). This school sees Covid-19 as a watershed or turning point for tourism, with irreversible impacts that will fundamentally shift the nature of tourism and human mobility in future (Higgins-Desbiolles, 2020; Sigala, 2020). It argues that the

time has come to ‘question the sustainability of success defined by growth in visitor numbers or increases in material consumption’ (Hall et al., 2020:591). From a New Zealand perspective, for example, the pandemic represents ‘an opportunity to re-envision our economies, possibly accelerating governments’ responses to environmental practices that have negatively impacted nature’ (Carr, 2020:30). Higgins-Desboilles (2020:70) sees Covid-19 as a possible game changer for global tourism, which offers ‘a chance to turn away from the hegemony asserted by market forces for their profit and return to an earlier vision of tourism as a social force’. Many contend that because Covid-19 exacerbates social and economic inequalities, recovery strategies should identify locally tailored solutions to redefine tourism based on local rights, interests and benefits (Rastegar et al., 2021).

Against this backdrop, this chapter draws upon a range of sources to investigate South Africa’s tourism industry in the Covid-19 environment. It builds on an emerging corpus of international and local research on the impact of the pandemic. Secondary research sources, including official statistics, were used to establish tourism’s contribution to the economy (Box 6.3.1), assess the pandemic’s impact on the sector, review regulations affecting the sector, and describe the economic measures adopted. Considerable use is made of research studies produced by the Department of Tourism and its partner, South African Tourism. The chapter also uses findings from commissioned research for the Department of Tourism undertaken by the University of Johannesburg, which involved 60 primary interviews with tourism businesses (from December 2020 to February 2021) around the impact of the pandemic and their adaptation strategies. Finally, a virtual interview was held on 20 October 2020 with the chief executive officer of the Tourism Business Council of South Africa to discuss organised tourism businesses’ experience of the pandemic and the related measures (Tshivhengwa, 2021).

#### *Box 6.3.1: Tourism’s contribution to the economy*

Tourism is measured through a consumption-based approach that identifies industries in which visitors spend money, such as transport, accommodation, restaurants, entertainment, recreation, travel agencies, and culture and sports (Stats SA, 2019). The retail sector is included, as visitor expenditure on retail (mostly on petroleum) comprised 7–8% of all retail income in 2018. Air passenger transport and accommodation rely mainly on visitors, as do tour operators, tour guides and some accommodation establishments (e.g., luxury lodges and hotels). Cultural and sporting activities and restaurants rely more on local residents.

Among these tourism-related industries, transport (Chapter 6.4) and soft drinks and tobacco (Chapter 6.5) were particularly vulnerable to the Covid-19 pandemic. Hotels, restaurants and similar firms spent a large share of their procurement bill on soft drinks and tobacco products in 2017. This also constituted a large share of supply in these industries (Rivett-Carnac, 2020).

## **IMPACT OF THE COVID-19 PANDEMIC ON THE TOURISM SECTOR**

In the pre-Covid era, South Africa welcomed 10,2 million foreign tourists (the vast majority of whom were regional arrivals from sub-Saharan Africa) and recorded 28,2 million overnight domestic trips in 2019 (SA Tourism, 2020a & 2020b). In 2018 tourism contributed 2,7% of the country’s gross domestic product (R130 billion) and supported about 740 000 direct jobs (Stats SA, 2019) and another 740 000

indirect jobs (WTTTC, 2018). The tourism sector’s 2018 balance of payments was R36,3 billion, slightly down from previous years.

## COVID-19 RESTRICTIONS

As in the rest of the world, tourism businesses in South Africa have been hit hard by the pandemic and related restrictions on their operations. The first restriction was the closure of the country’s borders on 27 March 2020; this triggered a dramatic collapse in international arrivals, from which the sector has not yet recovered (Box 6.3.2). Further operating restrictions meant that accommodation establishments, restaurants (except takeaways), visitor attractions, and the like could not trade even under alert level 4, and for some this extended into alert level 3 (Box 6.3.3). Industry criticised certain restrictions (e.g., on interprovincial leisure travel) as detrimental to the sector (Mabuza, 2020).

### Box 6.3.2: International tourism flows

The first detailed official statistics on the pandemic’s impact on tourism flows in South Africa appeared in a South African Tourism (SA Tourism, 2021) report released in March 2021. The report paints a gloomy picture of international tourism, with downturns of more than 70% in arrival data for all regions. It notes that ‘the outlook for resumption of international travel for tourism is still minimal’ (SA Tourism, 2021:10). For long-haul markets, international travel ‘remains low’ (SA Tourism, 2021:10). Since the opening of South Africa’s borders to international travel in August 2020, the leading source markets have been the United Kingdom, Germany, the United States, France and the Netherlands (Table 6.3.1). In terms of the volume of flows, most countries were described as ‘still 90% lower than the previous year’ (SA Tourism, 2021:10). Regional African arrivals similarly ‘remain low’ (SA Tourism, 2021:10). This said, African arrivals were almost ten times higher than long-haul arrivals. The major source markets in Africa were Zimbabwe, Mozambique, Lesotho, Eswatini and Namibia.

*Table 6.3.1: Leading source markets for international tourism arrivals, August to December 2020*

Rank	Country	Arrivals
1	Zimbabwe	101 852
2	Mozambique	77 511
3	Lesotho	35 021
4	Eswatini	25 999
5	Namibia	18 413
6	Zambia	14 827
7	United Kingdom	12 485
8	Botswana	12 368
9	Malawi	10 040
10	Germany	7 759
11.	United States	5 943
12	France	3 553
13	Netherlands	2 996
14	Democratic Republic of Congo	2 710
15	Tanzania	2 518

*Source: Based on SA Tourism, 2021*

Domestic tourism was allowed to resume in late July 2020, and total overnight trips recovered ‘to levels approximately 50% lower than in 2019’ (SA Tourism, 2021). Tourism spiked because of visits to friends and relatives shortly after domestic travel reopened, holiday travel in October, and business



travel in September and November 2020. Most restrictions on domestic travel were lifted under alert level 1. However, restrictions on tourism from red-listed countries and on operating hours, customer volumes and alcohol sale windows remained in place until 11 November.

### *Box 6.3.3: The restaurant sector in the pandemic<sup>1</sup>*

The restaurant sector was severely affected by the restriction on trade during the lockdown. While other countries allowed takeaway meals during hard lockdowns to assist the industry to some extent, South Africa did not. Both the Restaurant Association of South Africa and the Restaurant Collective (which covers 'sit-down' restaurants) reported not being consulted by government before lockdown, with little or no consultation during the initial and subsequent lockdown levels. There were reports of intimidation by the police, probably because the regulations were not well understood. Some noted that government did not appear to understand the restaurant industry or how it operates, and that it requires better recognition and more direct representation with the minister of tourism.

According to the Tourism Business Council (TBCSA, 2021) the prospects for domestic leisure travel in the summer season initially appeared promising. However, as the second wave of Covid-19 infections took hold, restrictions (including beach closures) were imposed on the Eastern Cape and Garden Route on 15 December 2020. On 28 December 2020 tighter restrictions were announced on all beaches in KwaZulu-Natal and the Western Cape; access to rivers, dams and lakes was closed; and alcohol sales were banned. South African Tourism data suggests domestic tourism contracted in December 2020, with 'total trips tapering to 60% lower than before' (SA Tourism, 2021:11).

## TOURISM SPENDING

With the restrictions on tourism came substantially lower spending on related activities. Households spent 99,9% less on restaurants and hotels in the second quarter of 2020 than in the first (Stats SA, 2020b). Accommodation establishments, which had already been affected in March, saw their income dropping precipitously between April and August 2020 (Table 6.3.2), with a 98,6% year-on-year decline in April, for example (Stats SA, 2020c). Restaurants, takeaways, catering and fast-food outlets likewise saw income falling by 31,4% year-on-year in March, 95,5% in April and 86,6% in May 2020. The decline was more muted from June to August 2020 (Stats SA, 2020a). The Tourism Business Council estimated the daily revenue lost to the sector before the resumption of domestic and foreign tourism at R748 million (Tourism Update, 2020). Box 6.3.4 provides some examples of the experience of selected subsectors of tourism and hospitality.

By December 2020 'income generated across the accommodation sector was still 60% lower than when compared to 2019, highlighting the struggle that formal establishments are facing' (SA Tourism, 2021:13). The tourism businesses that could still operate faced extra costs to realign their operations in compliance with Covid-19 regulations and the global trend towards the contactless economy and 'untact' or minimal contact in tourism operations (Rogerson & Rogerson, 2021a).

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<sup>1</sup> Anelich, [2020a](#) & [2020b](#); see also Chapter 6.2 on agriculture and the food supply chain.

*Table 6.3.2: Income from tourism, current prices, March to August 2020 (% change year-on-year)*

	March	April	May	June	July	August
<b>Tourist accommodation income</b>						
Income from accommodation	-41,7	-98,0	-98,1	-94,2	-91,0	-82,4
Total income incl. restaurant and bar sales and 'other income'	-33,6	-98,6	-97,9	-95,0	-88,6	-81,2
<b>Food and beverages income</b>						
Food sales	-30,1	-95,7	-86,2	-56,4	-47,4	-41,0
Bar sales	-43,4	-100,0	-100,0	-96,1	-94,2	-86,4
Other income	-42,2	-77,4	-68,0	-63,9	-57,7	-70,8
Total income	-31,4	-95,5	-86,6	-59,3	-50,8	-44,8

Source: Stats SA, 2020a & 2020c

#### **Box 6.3.4: Case studies of selected tourism subsectors**

*Hotels:* The annual results of JSE-listed City Lodge Group for the year to 30 June 2020 showed that 62 lodges closed under lockdown, and 32 were gradually reopened. Occupancy rates in local operations were only 7% in July and 10% in August (City Lodge Hotel Group, 2020).

*Restaurants* within the Spur group traded at 73,8% of 2019 turnover in September 2020, up from 36,5% in July and 56,7% in August. About 600 franchisees of 631 outlets were trading by September. Franchise and marketing fees were discounted, and payment terms were extended on certain debts (Gunnion, 2020).

A survey of 496 *game lodges* (35% in Limpopo and 34% in Mpumalanga, and 51% within the Greater Kruger Protected Area network) showed that 86% of these firms would run out of funds by year end. Together they employ 19 700 people, of whom 16 600 are from the local (rural) areas. Salaries to local people amounted to about R1,5 billion per year and local procurement spending to some R1,2 billion. Conservation programmes received about R789 million (Scott, 2020).

Beyond the 'reduced income for establishments that managed to keep doors open, a count of how many establishments have had to close their doors has been difficult to ascertain' (SA Tourism, 2021). Earlier on, surveys of tourism firms in March and June 2020 respectively attracted 1610 and 1501 responses (DT, 2020a & 2020b). The first survey found that 69% of these businesses had temporarily closed; by June, this had decreased slightly to 61%. Across the spectrum of accommodation services, the segments of 'caravan and camping' and 'guest houses and farms' seem to be better off because of their association with 'open spaces' and prospects for social distancing.

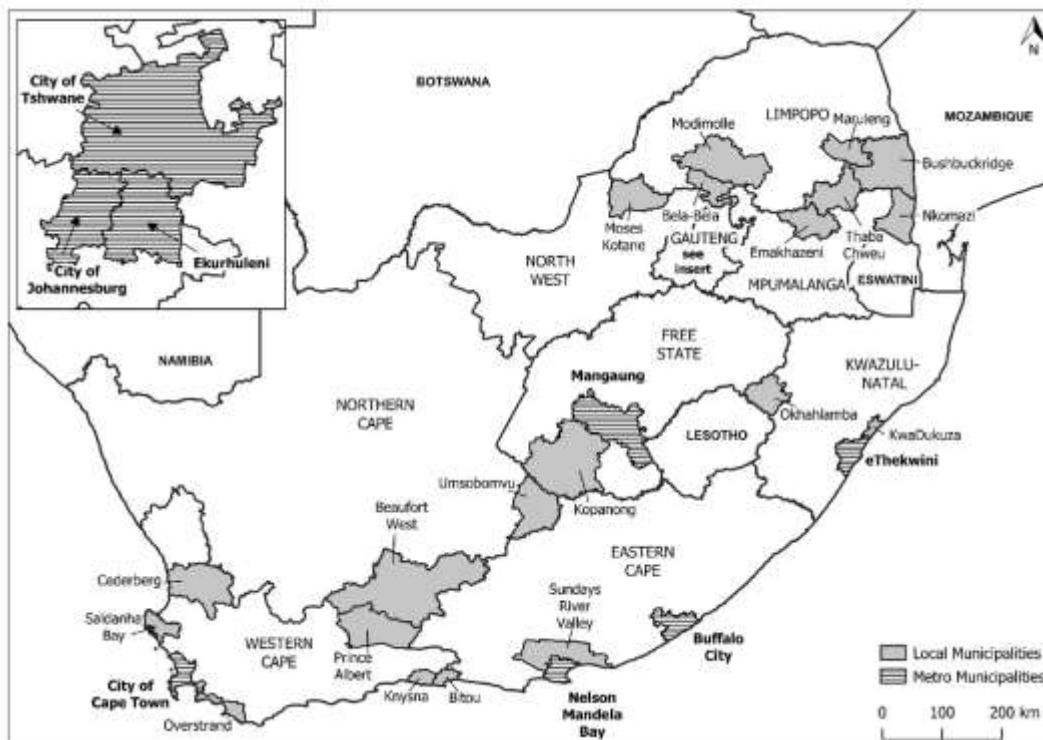
## **GEOGRAPHICAL IMPACT**

The Covid-19 pandemic has been shown to have uneven geographical effects, but as Turok & Visagie (2021:1) note, 'the geography of South Africa's twin public health and economic crisis has received little attention to date, given the focus of the pandemic analysis and response at the national and provincial levels'. Although the lockdown regulations have essentially been 'place-blind' on the grounds of simplicity, they have had multiple unintended consequences (negative economic and social impacts) for particular geographical areas and local communities. Their effects have not been space-blind, as is clear from the spatial impacts on the tourism sector.

The tourism dependence of an area can be assessed based on the relative share of tourism in the local economy (i.e., the gross domestic product). This is a critical indicator of the area’s vulnerability to the impact of Covid-19 on tourism relative to the broader structure of the local economy (Rogerson & Rogerson, 2020). Arguably, more economically diversified urban centres (e.g., the major metropolitan areas) would potentially be more resilient to the negative local effects of Covid-19. Correspondingly, localities that are most heavily tourism-dependent (being highly concentrated around the tourism sector) are most at risk or vulnerable to these effects (Rogerson & Rogerson, 2020 & 2021b).

Figure 6.3.1 shows the 20 most tourism-dependent local municipalities in South Africa. This list is dominated overwhelmingly by small towns that are traditional destinations for leisure tourism, such as Bela-Bela, Plettenberg Bay (Bitou), Knysna, Overstrand, the Drakensberg mountain resorts, and small towns around the Kruger National Park. Bela-Bela emerges as South Africa’s most tourism-dependent local government. In terms of city destinations, the most vulnerable are the Cape Town metropolitan area and the secondary cities of Mbombela (a gateway to the Kruger National Park) in Mpumalanga, Stellenbosch in the Western Cape, Polokwane in Limpopo, and Mogale City in Gauteng (Rogerson & Rogerson, 2021b). A finer-grained analysis would also highlight the plight of many local communities in the immediate vicinity of the major nature tourism destinations, whose livelihoods have been decimated by the loss of international tourism. Most of the severely affected local communities are in Limpopo and Mpumalanga, followed by the Eastern Cape, the North West, KwaZulu-Natal, the Northern Cape and even the Western Cape.

Figure 6.3.1: South Africa’s 20 most tourism-dependent local governments



Source: Rogerson & Rogerson, 2021b

## PROSPECTS FOR DOMESTIC TOURISM

Given the collapse of international tourism, domestic tourism is viewed as critical to the resilience of the national tourism sector. However, the Tourism Business Council report (TBCSA, 2021) cautions against over-optimism around domestic travel:

- *Domestic leisure travel* remains subdued for various reasons, such as lower discretionary income for travel because of the overall economic downturn, a fear of travel stemming from the perceived risks of infection, and the absence of the festivals, sports events or concerts that form the base of much domestic leisure travel.
- *Domestic business travel* is weak because of lower levels of corporate activity; internal corporate advisories that limit travel as part of Covid-19 risk policies; the lack of meeting, conference or exhibition travel; and minimal government travel because of both risk and budget constraints.

South African Tourism (SA Tourism, 2021) notes that domestic tourism mobilities by private (or rented) car have become relatively more important. This points to growth in ‘drive tourism’, a phenomenon observed in countries such as Australia (Rogerson & Rogerson, 2021a). One consequence of changes in domestic consumer travel after Covid-19 is the opening up of potential opportunities in less-visited tourism spaces, which might help improve the overall geographic spread effect of tourism (Rogerson & Rogerson, 2020 & 2021a; Bama & Nyakana, 2021), as discussed below.

## GOVERNMENT’S FISCAL RESPONSES

The South African government quickly instituted a number of targeted fiscal relief measures to assist hard-hit tourism operators and areas. Over time, these included the Tourism Relief Fund, the Tourist Guides Fund, and the Tourism Equity Fund. Tourism business could also draw on more general government support, as discussed below.

### TOURISM RELIEF FUND

In March 2020 the national Department of Tourism announced a R200 million Tourism Relief Fund to be financed from reallocated funds. It was to provide cash relief (a once-off R50 000 grant) to qualifying small or medium enterprises to subsidise ‘fixed costs, operational costs, supplies and other pressure cost items’. The fund was explicitly guided by the Tourism Broad-Based Black Economic Empowerment (BBEEE) Codes of Good Practices. Funding allocations were also to be spread equitably among the provinces. The fund was reserved for firms in the main tourism industries and excluded certain passenger transport services (e.g., air transport and minibus taxis), fast-food and takeaway outlets, nightclubs, bars, gaming and gambling venues, franchised restaurants, and restaurants attached to tourism facilities wholly or partially owned by government (DT, 2020c).

The fund accepted applications in April and May 2020 and paid out in July and August 2020. South African Tourism was the paymaster (AGSA, 2020). AfriForum and Solidarity challenged the distribution of the fund, specifically the use of BBBEE codes as a criterion, in a court case (Lekaba, 2020). The case, and the May 2020 appeal, was dismissed (Constitutional Court of South Africa, 2020). The fund

received 7288 applications, of which 4000 were successful (Table 6.3.3). The successful applicants had a wide geographical footprint, and just over 2000 were black-owned businesses (DT, 2020c). Media reports suggest that 3284 applications were unsuccessful because the fund lacked resources; some of these applicants had met the criteria (Selisho, 2020). Although successful recipients were grateful for the funding, some businesses owners pointed out it was simply ‘a drop in the ocean’ relative to the finance they needed to survive (Booyens et al., 2021).

*Table 6.3.3: Tourism Relief Fund: Approved applications per province and business type*

Province	Total applications received	Total approved applications	Accommodation (hotels)	Hospitality and related services (restaurants)	Travel and related services (vehicle hire, bus companies)	Other (event organisers)
Eastern Cape	746	457 (11%)	255	111	62	29
Free State	285	133 (3,3%)	65	43	18	7
Gauteng	1752	1017 (25,4%)	246	257	439	75
KwaZulu-Natal	1149	610 (15,3%)	233	176	155	46
Limpopo	529	294 (7,4%)	123	74	76	21
Mpumalanga	434	238 (6,0%)	119	56	48	15
North West	298	161 (4,0%)	90	29	25	17
Northern Cape	222	124 (3,1%)	77	24	12	11
Western Cape	1876	966 (24,2%)	352	179	348	87
<b>Total</b>	<b>7 291</b>	<b>4 000</b>	<b>1 560</b>	<b>949</b>	<b>1 183</b>	<b>308</b>

Source: AGSA, 2020:144

The Auditor-General’s special report into the financial management of government’s Covid-19 initiatives reviewed the Tourism Relief Fund noting that payments had been delayed by information technology challenges (AGSA, 2020:144). Key audit observations from the report include:

- The criteria for assessing beneficiaries were amended from a score matrix to a compliance list, which also ranked successful applicants on a first-come, first-served basis.
- The manual verification and assessment process could be prone to human error.
- There was a risk of reviews not being comprehensive because of the volume of work.
- Duties in capturing and verifying banking details on the system were not segregated.

The Auditor-General’s report indicates that the department’s accounting officer and management team felt confident that existing controls were sufficient to mitigate these risks (AGSA, 2020:145–6).

## TOURIST GUIDES FUND

In July 2020 the Department of Tourism launched a second fund to help tourist guides who could not claim from the Tourism Relief Fund because of their freelance status (DT, 2020a). This fund, capped at R30 million, was to pay each qualifying tour guide R1500 a month for three months. Provinces submitted to the national tourism department a list of 9380 guides who were being assessed to avoid ‘double dipping’ from the Unemployment Insurance Fund (UIF) (Selisho, 2020).

## TEMPORARY EMPLOYEE/EMPLOYER RELIEF SCHEME

In April 2020 the Tourism Business Council signed an agreement with the UIF and the Department of Labour to assist with Temporary Employee/Employer Relief Scheme (TERS) funding applications for tourism (Masihlelo, 2020). Precise numbers of applications and successful applicants from the tourism sector are not publicly available, but many tourism firms appear have benefitted from this funding (Tshivhengwa, 2021). Research conducted by the University of Johannesburg on the impacts of the pandemic on a cross-section of 60 tourism businesses highlighted the critical importance of TERS funding for these businesses. The TERS support was widely welcomed as perhaps the most impactful of all government interventions supporting the tourism industry. In his State of the Nation address on 11 February 2021, President Cyril Ramaphosa announced that the UIF Fund would extend the TERS benefits to 15 March 2021 (SA news, 2021a:1).

## TOURISM EQUITY FUND

The R1,2 billion Tourism Equity Fund was officially launched on 26 January 2021. At this virtual event, President Ramaphosa welcomed the fund as a support for the Economic Reconstruction and Recovery Plan, one measure of which was transformation ‘to protect the supply-side capacity of the tourism sector’. The Tourism Equity Fund would be the vehicle to aid the recovery of the sector by fostering large capital investments (The Presidency, 2021:3). The fund was established by the Department of Tourism in partnership with the Small Enterprise Finance Agency to deepen transformation of the tourism sector.

As they did with the Tourism Relief Fund, AfriForum and Solidarity took legal action, with the AfriForum Head of Campaigns, Monique Taute, maintaining that the Department of Tourism did not have the interests of all its constituencies at heart. She was quoted as saying it ‘was now abusing the situation by using it as an opportunity to promote its race-driven goals’ (Mackenzie, 2021). In response the department reiterated that the fund was not a ‘relief fund’ but rather a public-private partnership that aimed to ‘crowd-in investments in the tourism sector so as to increase diversification and the broadening of ownership of tourism attractions’ (Mackenzie, 2021). Arguably, according to Zille (2021:2), the Covid-19 crisis created ‘opportunities for meaningful transformation, rooted in inclusive business partnerships across all segments of the tourism economy’.

Critics of the fund point to the timing of its launch, given the devastation faced by the majority of tourism businesses. They argue that government ‘placed transformation ahead of a growing industry, thus hurting the very people that such a fund should support’ (Mackenzie, 2021). Zille (2021:2) maintains that whilst the fund’s purpose of providing debt and grant funding to facilitate equity ownership and project development by black entrepreneurs ‘is clear and urgently needed, its funding model is vague and ill-defined’, as ‘it is devoid of the solid funding criteria needed to ensure transparency, impact and sustainability and to avoid cronyism and corruption’. A future is threatened of ‘a generously funded pipeline of struggling businesses unable to survive without ongoing subsidy and support’; this in turn would feed ‘the perception that government is using the crisis to drive a

racially exclusive transformation agenda in tourism’ (Zille, 2021:6). As the South African tourism sector is haemorrhaging jobs, Zille (2021:4) questions why the core empowerment criterion is the 51% black ownership requirement and why ‘job retention and job creation, surely the most important broad-based empowerment considerations of our time, don’t warrant a mention’.

## FISCAL TRANSFERS TO HERITAGE AND PROTECTED AREA INSTITUTIONS

Tourism is a major source of income for parks and conservation areas. In 2017/18, South African National Parks (SANParks) earned R1,6 billion from tourism, up from R972 million in 2014 (SANParks, 2019). Of this amount, R1,06 billion came from 50 public-private partnerships (e.g., luxury lodges and the Table Mountain Aerial Cableway Company). To soften the blow of lost tourist income during the pandemic, the Department of Environment, Forestry and Fisheries recently transferred R39 million to the Isimangaliso Wetland Park Authority and R961 million to SANParks (Carney, 2020).

## NON-FISCAL COVID-19 SUPPORT AND RECOVERY MEASURES

Both government and industry provided non-fiscal support to firms, as set out below.

### DEPARTMENT OF TOURISM’S RESPONSE STRATEGY

In August 2020 the Department of Tourism published a draft tourism sector recovery plan for comment (DT, 2020d). The plan has three main thrusts: protecting and rejuvenating supply (tourism firms and air access), reigniting demand (domestic and foreign marketing), and enabling capacity (e.g., e-visas). In March 2021 it was reported that the recovery plan to resuscitate the sector and tourist value chains was ‘soon to be presented to Cabinet for approval’ (SA news, 2021b:1).

### HEALTH PROTOCOLS

In May 2020 the tourism industry published standard protocols for managing the Covid-19 health risks of both guests and staff at tourism businesses (TBCSA, 2020). Aligned with international and national guidelines, the protocols cover practices such as customer information, personal protective equipment (PPE), physical distancing, and sanitisation and hygiene.

### INSURANCE PAY-OUTS

Many tourism businesses struggled to access their business continuity insurance. In July 2020 the Financial Sector Conduct Authority and the Prudential Authority reached an understanding with non-life insurers to consider interim relief to their policyholders (FSCA, 2020). On November 17, in a case brought by Ma-Afrika Hotels and Stellenbosch Kitchens, together with Insurance Claims Africa, representing over 750 tourism and hospitality businesses, the Western Cape High Court found that Santam was liable to pay business interruption losses related to the Covid-19 lockdown (van der Merwe, 2020; see also Chapter 6.5).

## INDUSTRY SUPPORT SCHEMES

Several industry schemes supported tourism businesses, especially restaurants, and their local communities. These included the Support Stellenbosch Restaurant reward scheme (Visit Stellenbosch, 2020), the Rescue Restaurants voucher scheme (Restaurants Rescue Project, 2020), and the Eat Out Restaurant Relief Fund (Eat Out, 2020). Industry also launched marketing and public relations campaigns to highlight the importance of tourism to the economy, particularly to jobs, and lobby for the removal of certain restrictions. These campaigns include those run by South Africa is Travel Ready (2020a & 2020b), a '[public relations and] communications collaboration of influential agencies in the tourism and hospitality space which are supporting the inbound tourism industry's efforts to open the country to international tourism, create awareness of the role tourism plays and inspire visitors to return because South Africa is 'travel ready''.

## REPURPOSING

Tourism businesses also repurposed their operations to provide broader support to the community. For example, Ubuntu Beds (2020), launched in April, helped accommodation providers provide free accommodation to essential service providers. Some restaurants and similar businesses provided free food (e.g., soup kitchens); Woodstock Brewery (2020) is one example, as is Grootbos Foundation (2020). Another element was digital tours and digital wildlife safaris, allowing audiences around the world to participate in virtual activities. WildEarth.tv is one example of a virtual wildlife offering that has received significant coverage (WildEarth, 2020).

## PRELIMINARY LESSONS LEARNT

The Covid-19 pandemic has heightened awareness of the importance of tourism experiences and consumption for people and local communities (Saarinen & Wall-Reinius, 2021). The pandemic also continues to exert a drastic impact on the tourism sector and may well significantly reform future landscapes and servicescapes (Kowalska & Niezgodna, 2020; Gössling et al., 2021). Considerable international evidence exists of shifts in consumer demand and in the character and patterns of domestic tourism in North America, Europe and Australia (Rogerson & Rogerson, 2021a). Arguably, certain other changes may well emerge in the unforeseeable future.

Given the decimation of tourism income and the continuing low levels of operational income in key tourism industries (e.g., restaurants and accommodation), the scale of funding relief to tourism businesses is unlikely to have been sufficient to stem job losses and business closures.<sup>2</sup> From a comparative international perspective, the support the South African government provided to the decimated tourism sector has been relatively meagre (Booyens et al., 2021). As Turok & Visagie (2021:1) notes, 'South Africa's response was limited by the poor state of public finances'.

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<sup>2</sup> This has been corroborated in interviews with the Restaurant Association of South Africa and the Restaurant Collective (which covers 'sit-down' restaurants), as per Anelich (2020a & 2020b). See also Chapter 6.2.



While the Department of Tourism launched the Tourism Relief Fund early in the pandemic, the fund was quickly depleted. It did meet its short-term objectives, particularly its focus on small, black-owned businesses, many of which are relatively recent entrants into the sector. The fund was not, however, sufficiently capitalised. It is also questionable whether the R50 000 grant would be sufficient to ‘keep doors open’ for tourism firms, many of which are likely to face poor trading conditions for some time. Furthermore, the Tourism Relief Fund provided relief only to registered businesses. The relatively quick establishment of the Tourist Guides Fund is to be lauded as a responsive measure to address one part of the informal (albeit organised) tourism economy. Other informal operators could not access the once-off grant. There is little data on the number of such operators, because they fall outside the business registers used for surveys, so the extent of the impact is impossible to quantify.

Arguably, TERS funding has been most important for the survival of businesses, jobs and livelihoods in South Africa’s tourism economy. The potential termination of this wage support is likely to have seriously negative consequences for many tourism employees, their families and communities, with government admitting that tourism levels will take considerable period to recover (SA Tourism, 2021). The devastating effects of the pandemic on tourism business survival are gradually becoming apparent. The impending permanent closure of many businesses is a threat to local economies and community livelihoods. The danger of closures is worsened by the pandemic’s trajectory, continued travel restrictions (especially on international tourism), and the slow roll-out of vaccinations (SA Tourism, 2021). Arguably, to ensure the tourism sector is ‘built back better’, policymakers need to reflect on wider international trends, particularly the notion that tourism in the post-Covid-19 era should be aligned to a ‘new normal’ – achieving the United Nations Sustainable Development Goals, rather than simply chasing growth in visitor numbers at any cost.

## IMMEDIATE INTERVENTIONS

A set of preliminary recommendations around immediate interventions for assisting the South African tourism sector were put forward in the University of Johannesburg investigation on the demand and supply-side impacts of Covid-19. These recommendations were workshopped at the Department of Tourism’s webinar on Advancing Tourism Growth and Development through Research, held in March 2021 (Rogerson & Rogerson, 2021c). By way of conclusion, the 12 recommendations are summarised below.

- The importance of automobilities in South Africa will inevitably increase. It is recommended that the Department of Tourism *recognise the potential growth of drive tourism and initiate a set of policy interventions* to take advantage of the current window of opportunity to support this form of domestic tourism. Key initiatives would include:
  - revisiting tourism route planning
  - enhancing signage
  - improving local governments’ awareness of the importance of drive tourism
  - working with the Department of Transport on improving road infrastructure, enhancing road safety, and preventing road accidents.

- Domestic drive tourism creates opportunities for addressing the uneven geographical spread of tourism, as people now seek out less-crowded places. It is recommended that the Department of Tourism *improve the awareness of local governments in rural and remote areas* – especially around nature tourism – of a vital window of opportunity to market those attractions to potential domestic tourists around ‘natural open space’, ‘tranquillity’ and ‘seclusion’. Discovering and recommending tourist routes based on untact (e.g., drive routes, walking or bicycling trips) is recommended. In line with international trends, consideration should be given to local governments implementing a ‘safety tourist destination’ certification system.
- Growing tourism in pristine environments (e.g., national parks and nature reserves) will pose particular challenges for protected areas. It is recommended that the Department of Tourism launch a *monitoring study of the impacts of expanding domestic tourism flows into protected areas*, especially in terms of ensuring their long-term sustainability as spaces for improving physical and emotional wellness and mental health. Most of the benefits of enhanced health and welfare inevitably accrue to more affluent groups; ensuring that such benefits also filter down to lower-income and disadvantaged communities will be an important policy challenge. This point is reinforced by significant research findings on the travel intentions of domestic tourists in Africa, which highlight persistent issues of affordability and willingness to pay for most tourism products among the economically challenged domestic consumer market (see Woyo, 2021).
- As the demand for visits to national parks, green spaces and ‘tourism in nature’ increases (in part because of their physiological, psychological and mental health benefits), real opportunities exist to expand commercial nature tourism. It is recommended that the Department of Tourism launch a *research investigation into the experiential components and commercial design for different market segments of such nature forms of tourism*. The investigation can draw on existing research and debates, for instance in Australia (Buckley, 2020; Buckley & Westaway, 2020).
- For cities, the potential shifts in the travel behaviour of visitors offer opportunities to change the intra-city spatial distribution from major attractions to less-visited areas. Such a development could provide areas with new options for value creation and even allow cities to develop a more diversified portfolio of tourism products. This could make them more resilient and provide residents with a greater range of local leisure opportunities and experiences. It is recommended that the Department of Tourism launch an *investigation into opportunities to develop new products, such as creative tourism* and off-the-beaten track tours to support the visitor economy of cities and increase the geographic spread of tourism impacts in the major cities.
- In relation to popular tourism attractions – whether in cities or national parks – it is recommended that the Department of Tourism *support the installation of technologies for flexible tourism demand management*. This would allow them to gather real-time data to inform control measures to minimise congestion and to maximise social distancing.
- As ‘aquamobilities’ in the form of cruise tourism appear unlikely to regain their pre-Covid-19 popularity, it is recommended that the Department of Tourism liaise with other departments involved in Operation Phakisa and the oceans economy to *urge the abandonment of plans for*

*building new cruise ship terminals*. It should also revisit its Coastal and Marine Tourism Strategy, which feeds into planning frameworks around the oceans economy.

- For reigniting international tourism and promoting ‘untact tourism’, it is recommended that the Department of Tourism expand the awareness of tourism businesses and of local governments of the potential and importance of *best practices relating to safety and cleanliness, the growth of the contactless economy, and foster an ecosystem of tourism services centred around the concept of untact* (Jeon & Yang, 2021). In addition, it should initiate a process to identify safe, nature-friendly untact tourism attractions to be marketed internationally, especially in Asian markets.
- Covid-19 and the lockdown have left tourism businesses in a fragile state. Although government financial assistance to firms is not expected, given the current direction of policies, a strong case exists for extending such assistance to workers in tourism and hospitality establishments. It is recommended that *TERS be extended for workers in the debilitated tourism and hospitality sector*.
- Domestic tourism is subdued in part because of a ‘fear of travel’ among potential local tourists, despite the legislated requirements for and commitment of the overwhelming majority of tourism and hospitality establishments to Covid-19 protocols and evidence of a local form of untact tourism. This underlines the need for the Department of Tourism to launch an immediate and energetic *marketing campaign about the safety of tourism establishments and commitments to high standards of hygiene and personal safety*.
- In some areas, major weaknesses in the quality of road infrastructure, signage and maintenance hamper opportunities for drive tourism. It is recommended that the Department of Tourism ensure that as part of the president’s commitment to new infrastructure projects, *road infrastructure projects linked to existing tourism nodes are prioritised*.
- Finally, the potential loss of the tourism product base and of tourism skills is an immediate threat in many parts of South Africa. The impending closure of many tourism businesses, especially in tourism-dependent areas, will badly affect local employment and livelihoods. It is recommended that the Department of Tourism launch an *investigation into the impacts of tourism establishment closures on local communities*, to help plan exit strategies from tourism and train or reskill communities for non-tourism livelihoods.

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