

Implications of COVID-19 Induced Lockdown on the South African Tourism Industry and Prospects for Recovery

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Abstract

South Africa has one of the largest and most developed tourism markets in Southern Africa. Consequently, the sector's performance, therefore, has implications on the regional tourism market. In the advent of COVID-19, South Africa emerged as one of the global and regional epicentres of coronavirus infections. In March 2020, South Africa was one of the countries that adopted hard lockdown measures to control the pandemic. The consequent sealing off of the country's ports brought the tourism industry to a sudden halt. This study is aimed at examining the impact and potential reopening strategies that the tourism industry can adopt in South Africa. The study is based on critical document analysis of survey reports from South Africa's National Department of Tourism, Stats SA, Google Mobility and other authoritative, relevant sources. The study concludes that the pandemic had a devastating impact on various sectors of the tourism economy. The most devastating industries include the aviation, maritime, special events, accommodation and attraction sectors. The sudden halting of the tourism industry threatened conservation efforts and the business viability of many tourism establishments. Consequently, public and private airlines were liquidated or placed under business administration with far-reaching implications for various destinations and travel sectors. The study recommends a well-engineered financial aid package for the region's tourism industry, reduced tourism levies and taxes backed by the adoption of stringent health protocols to help the industry recover and make travel appealing and attractive again. A robust vaccination program must support such efforts.

Keywords: COVID-19, South Africa, tourism, recovery, hospitality industry

Introduction

The advent of the global pandemic COVID-19 brought about a flurry of global challenges. The dreaded pandemic's economic and social ramifications have been devastating and are yet to be fully quantified and comprehended. According to Gössling, Scott and Hall (2020), the COVID-19 pandemic caused unprecedented economic disruption never seen before since World War II. Economies in both developed and developing world across the social and political divide have been grossly undermined by the pandemic, threatening the achievement of the Sustainable Development Goals (SDGs) (Nhamo, Dube & Chikodzi, 2020b). Of all the affected sectors, the tourism industry is one of the industries that have been worst affected by the disease outbreak. The demand for social distancing that ensued resulted in the closure of borders and other entry ports as countries and territories battled to control the disease. On the other hand, the travel industry was blamed for its contribution to the spread of COVID-19 (Lew, Cheer, Haywood, Brouder & Salazar, 2020).

The tourism industry, which is the mainstay of most developing and other developed economies Nicola, Alsafi, Sohrabi, Kerwan, Al-Jabir, Iosifidis and Agha, (2020), thrives on social mobility and interaction was left in a quandary resulting in a near collapse of some

sectors and sub-sectors of the industry. According to Dube, Nhamo and Chikodzi (2020a), the pandemic crippled the tourism and hospitality sector with far-reaching implications on employment levels and job security for many in the tourism and hospitality sector. Another study by Nhamo, Dube and Chikodzi (2020b) and also Gössling, Scott and Hall, (2020) examined the pandemic's sector-wide impact on the tourism industry.

Carr (2020) argued that the pandemic would have intergenerational consequences for indigenous and non-indigenous people. According to Baum and Hai (2020), there are serious concerns about the impact of COVID-19, particularly on the Global South. The region is touted to be one of the most vulnerable, given its socio-economic and complex geographic context. The region is also heavily reliant on tourism. Lindsey, Allan, Brehony, Dickman, Robson, Begg and Flyman (2020) noted that in as much as COVID-19 induced changes could benefit biodiversity in some ways in Africa, the pandemic induced changes were likely to be negative in many ways. There are real fears that the cut-off of the tourism market supply would reduce income for the conservation in protected areas. This could worsen poaching incidences and undermine conservation activities when the world is battling species loss due to global climate change. This is a concern in light of the increased incidences of poaching of endangered species.

There is an acknowledgement that the pandemic has reset the global tourism economy with far-reaching implications on local communities and tourism businesses (Higgins-Desbiolles, 2020). Hall et al. (2020) also highlighted that the history of pandemics has shown that they tend to have a revolutionary impact on the tourism industry. Therefore, there is a need to take caution as such impacts are likely to be disproportionate across communities and can result in unexpected and undesirable changes. In that light, this study seeks to investigate the effects of COVID-19 induced lockdowns on tourism in South Africa and examine recovery prospects for the tourism industry's recovery. The study aims to answer the following research question: What is the impact of prolonged hard lockdown on South Africa's tourism industry and its recovery prospects?

Impact studies of such nature are crucial in as much as they allow for tourism role players to understand the current status to inform policy and practice. Given the centrality of such studies, which are needed to understand how the pandemic's impact is evolving and affecting the tourism sector, the United Nations World Tourism Organisation has set up a platform that monitors the global tourism sector. Similar studies have been conducted in Malaysia (Foo, Chin, Tan & Phuah, 2020), Nepal (Sah, Sigdel, Ozaki, Kotera, Bhandari, Regmi and Dhakal (2020), and India (Jaipuria, Parida & Ray, 2020), to mention but a few. Rogerson and Baum (2020) argued that COVID-19 arouses new tourism research agendas in subjects such as market confidence, community tourism, informal tourism sector resilience, to mention but a few.

Literature review

The advent of COVID-19 at the end of 2019 and the disease's subsequent proclamation as a pandemic on 11 March 2020 by the World Health Organization (WHO) resulted in global market turmoil. One of the worst affected economic sectors was the tourism industry which was crippled due to stoppages of people moving across the territories. The travel restrictions that governments across the world imposed disrupted the tourism industry's supply and demand (Dube, Nhamo & Chikodzi, 2021). The imposition of lockdowns came at a great cost to various sectors of the tourism economy, such as casinos (McCartney, 2020), the car rental industry (Nhamo, Dube & Chikodzi, 2020c), the leisure industry (Lee & Chen 2020), museums (Antara & Shuvro, 2020), aviation industry (Suau-Sanchez, Voltes-Dorta & Cugueró-Escofet, 2020;

Abu-Rayash & Dincer, 2020) and hotel industry (Hao, Xiao & Chon, 2020) to mention but a few.

The chaos brought about by the COVID-19 pandemic had a devastating impact on the tourism market, wreaking havoc on tourism company stocks (Nhamo, Dube & Chikodzi, 2020d) and other companies within the broader economic spectrum (He, Liu, Wang & Yu, 2020; Şenol & Zeren, 2020). In an attempt to rescue tourism companies across the world, several market and fiscal initiatives were taken to ensure the survival of tourism companies well beyond the COVID-19 pandemic peak. The COVID-19 pandemic had a devastating impact on the socio-economic lives of tourism employees. Many tourism employees were condemned to poverty as most companies adopted a furlough programme (Chen, 2020), reduced working days, and some companies closed altogether, which resulted in job layoffs (Suau-Sanchez, Voltas-Dorta & Cugueró-Escofet, 2020). Jung, Jung and Yoon (2021) bemoaned the impact of COVID-19 on job security and turn over for hotel employees. The study found that the impact of COVID-19 had been disproportionate and affected Generation Y than Generation X. This attests to the much-acclaimed differential impact of the pandemic on various groups of people. COVID-19 also had a damaging psychological effect on tourism employees who had to deal with multiple challenges imposed by the pandemic and infections (Mao, He, Morrison & Andres Coca-Stefaniak 2020; Ozdemir, 2020).

When the international tourism industry failed amidst the raging COVID-19 pandemic, the New Zealand Government, for example, introduced several initiatives to assist the industry, such as staff wage subsidy, providing stimulus packages to ensure the industry survives the COVID-19 induced lockdowns (Carr, 2020). Evidence suggests that the indigenous people and those from disadvantaged communities whose lives are largely dependent on the tourism industry were going to bear the harsh brunt of the socio-economic impact of COVID-19 (Wendt et al., 2021; Cohen & Mata-Sánchez, 2021).

This is particularly true for Africa, where the pandemic is expected to adversely affect the marginalised community in a continent where tourism was one of the largest and fastest-growing economic sectors (Nyasha, Odhiambo & Asongu, 2020; Palop, Mucke & Roberson, 2020) before the pandemic in 2020. Smith, Smit, Swemmer, Mokhatla, Freitag, Roux and Dziba (2021) argued that the pandemic had a serious adverse impact on the national parks in South Africa. South African National Parks rely heavily on tourists' revenue, which renders it vulnerable as COVID-19 wiped off the tourism market, which was the main source of funding for conservation and other projects. This confirms fears by Rogerson and Rogerson (2020), who predicted the devastating impact of COVID-19 on the South African tourism economy due to underlying vulnerabilities.

Understanding and tracking the impact of COVID-19 on the African tourism market is crucial for policy planning for both the affected countries and the global community at large. Such an understanding is crucial in informing strategies for recovery and future practice. It is in that realm that this study is undertaken. Africa that is already battling multiple threats to its economies such as climate (Abidoye & Odusola, 2015; Gizaw & Gan, 2017), toxic political environment (Kisten, 2020; Dalyop, 2019) and economic stagnation (Lundahl, 2019) is likely to require considerable support to recover from the economic ramifications imposed upon it by COVID-19.

Given the significance of the impact of the COVID-19 pandemic, there have been calls to reimagine the future research agenda for tourism. Zenker and Kock (2020) noted that there is a need for the tourism industry to investigate how the tourism disaster will affect the complexities of the tourism industry. Understanding how COVID-19 will affect tourism behaviour, destination image, changes to tourist behaviour, how COVID-19 will alter host community behaviours and understanding of the short and long term are issues that warrant

robust engagement and debates going forward. Impact studies, therefore, are just a single step in achieving that.

Study area

The study focussed on examining the impact of COVID-19 induced lockdown on the tourism economy of South Africa. South Africa falls under the Sub-Saharan Africa region. South Africa is a top-ranked tourism destination ranked number 61 in the Travel and Tourism Competitiveness report in 2019 (World Economic Forum, 2019). Given the influence and infrastructure that South Africa had before the COVID-19 pandemic including, a robust air traffic system (Figure 1) and the size of its middle and upper-class population has a significant impact on domestic and regional tourism development. It is also estimated that about 30% of tourists who visit South Africa also visit other destinations in the region (Mhlanga, Steyn & Spencer, 2018).

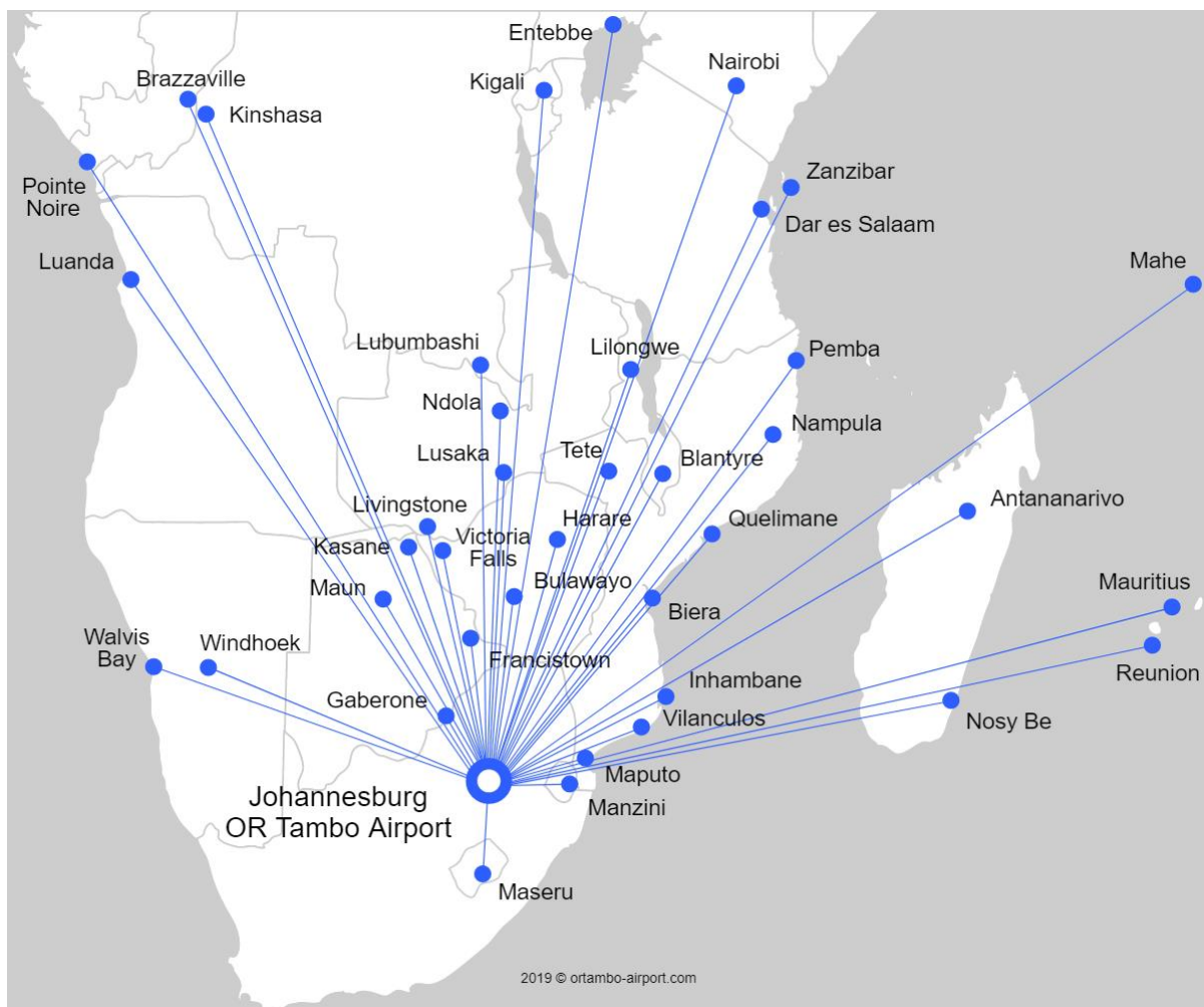


Figure 1: The SADC regional route mapwork of South African Airlines
Source: OR Tambo Airport (2019)

Research methodology

To respond to the set-out research question, the study makes use of archival and secondary data from authoritative sources such as government reports, the United Nations agencies reports, Stats SA reports and other industry reports. Jones (2010) defines archival data as information that has been previously gathered by others that is amenable to systematic studies. According

to Fischer and Parmentier (2010), archival data can be used as a primary source in research and offers numerous advantages, particularly to consumer studies and related areas. Given that archival data is easily available in most cases, costs are drastically cut, making it affordable for researchers. The other advantage of archival data is that it can allow for longitudinal studies.

Archival data was augmented and triangulated with personal knowledge and personal experiences gained from field observations in 2020. The researcher stayed at 15 different accommodation establishments between October and December on a data collection exercise in Western Cape, Eastern Cape, Free State, Mpumalanga, and Northern Cape. Only authoritative and specialised industry sources were considered for this research, for material published between January 2020 and 2021 were selected. Key search terms that were used include COVID-19 impact on tourism, aviation, accommodation in South Africa. The focus was on major reports published in business news articles, tourism sector organisations report from national and provincial governments agencies. The study used quarterly reports from Stats SA monthly reports on quarterly reports on accommodation from data collected from tourism establishments, UNWTO dashboard for tourism insights, and quarterly reports from Surveys conducted by the National Department of Tourism and the Tourism Business Council of South Africa.

The study also made use of big data generated principally generated from COVID-19 Google mobility reports. The Google mobility reports are auto-generated from aggregated, anonymised sets of data from users who have turned on the mobile phone Location History setting, which is off by default (Google Mobility, 2020). The use of big data that includes GPS and smartphone generated data traffic has been increasing in usage in tourism studies and is considered valid (Li, Xu, Tang, Wang & Li, 2018; Tussyadiah & Inversini, 2015). Critical document and thematic analysis were conducted to deduct results and make conclusions.

Results and discussion

The study found that, like any other part of the world, the pandemic's impact on the tourism industry has been devastating on the South African tourism market. The study found that amongst selected leading tourist destinations in the Sub-Saharan Africa region, South African tourism started on better footing than the previous year in 2019. International tourist arrivals were largely in the positive territory between January and February. However, the situation dramatically changed in March when COVID-19 was declared a pandemic (Figure 2). The situation deteriorated in April and May 2020 at the height of lockdowns. When COVID-19 was declared a pandemic on 11 March 2020, most countries moved swiftly to close their borders to avoid further importation of the disease and try to force the 'flattening of the curve.

The international tourists' arrivals plunged to -86% year on year with a devastating impact on hotel bookings, and air reservations being the worst affected. The intention to travel amongst many tourists was also adversely affected, as was seen in other parts of the world (Luo & Lam, 2020). April, May, and June of 2020 were the worst for the tourism industry, signified by a very low business. The situation started improving in July under the developed and safety protocols. By the close of 2020, the worst affected part of the tourism industry was the hotel industry which was operating at -78% yearly, with air travel still subdued at -72%. Evidence from UNWTO (2021) shows that the year was largely bad for the travel and hospitality sector as the industry failed to offset losses made during the year 2020. This had far-reaching implications for tourism growth and its contribution to national and regional development and employment in the affected countries.

Inadvertently, South Africa, which had the highest number of infected people in Africa, entered into a five staged lockdown calibrated from stage one to five in a bid to save lives and livelihoods in response to the pandemic. Under the higher stage, category 5, the country was

locked down with only essential service providers allowed to go to work and movement of the citizen to buy essential supplies within their neighbourhood, which started on the 26 of March. At stage 4 and stage 5, all airports, hotels, restaurants and other recreational facilities were banned from operating except for emergency and repatriation services and frontline workers. Limited travel was allowed under lockdown level three for essential workers, allowing for business travel across provinces. Also, takeaway food service providers were allowed to operate with dine-in prohibited. Provincial leisure travel was also allowed at stage 3 lockdown. Interprovincial travel that allowed domestic travel only came into effect in August and allowed airports and the airline industry to operate together with other tourism sectors under strict adherence to set down protocols.

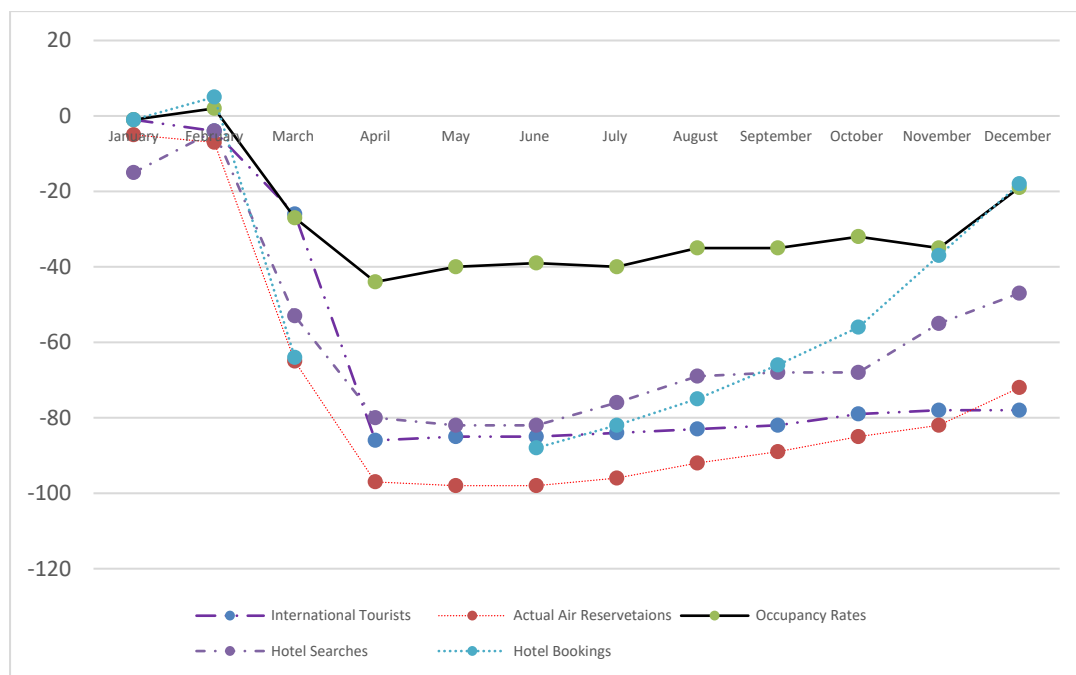


Figure 2: Regional overview of the impact of COVID-19 on tourism performance in the first half of 2020 on Sub-Saharan Africa
 Source: Author Data from the United Nations World Tourism Organization - UNWTO (2021)

Figure 3 shows the impact of lockdown on the travel and tourism industry on the Google Mobility Index as measured against the median value, for the corresponding day of the week, during the 5 weeks period Jan 3–Feb 6, 2020. The study shows that there was a significant decline in the mobility of tourists at various transit stations and other recreational facilities in the country between March 30 to about April 16, which coincides with the hard lockdown, which was instituted right about the same period on the 26th of March 2020. The study found that hard lockdowns adversely affected people movement, particularly between March and April. Post that, there was some improvement, particularly under level 2 and level 1 lockdown, which took place in August and September, respectively. There was significant movement at transit stations, retail and recreation places and parks which lasted up to December when a second wave resurgence forced the country into an adjusted level 3 lockdown scenario. Even at the peak of travel in December 2020, before moving the country into adjusted level 3 lockdowns, the traffic failed to reach the levels prior to the declaration of COVID-19 as a pandemic as people mainly stayed at home. Such a scenario had an adverse effect on the tourism and travel sector in the country.

There is clear evidence from Figure 3 that despite a relaxing of travel restrictions, there was not a full uptake of the tourism products by both local and international tourists as fear could have been the limiting factor for people to go out and enjoy. With regards to international tourists, the situation was much more complex as key markets policies on international travel kept on shifting, which made it difficult for travel planning. During the second wave, most countries discouraged their citizens from travelling abroad, with some market instituting hard lockdowns. The situation was further heightened by the emergence of COVID-19 variant N501Y in South Africa. This variant was discovered at a time when vaccines had just been developed. The N501Y variant, which was dubbed the South African variant, caused many countries to red flag travellers from South Africa and resulted in cancelling of flights to and from South Africa and other SADC countries. This had dire consequences for the international tourism market to South Africa and the SADC region as key markets such as Britain and the USA issued travel bans to South Africa.

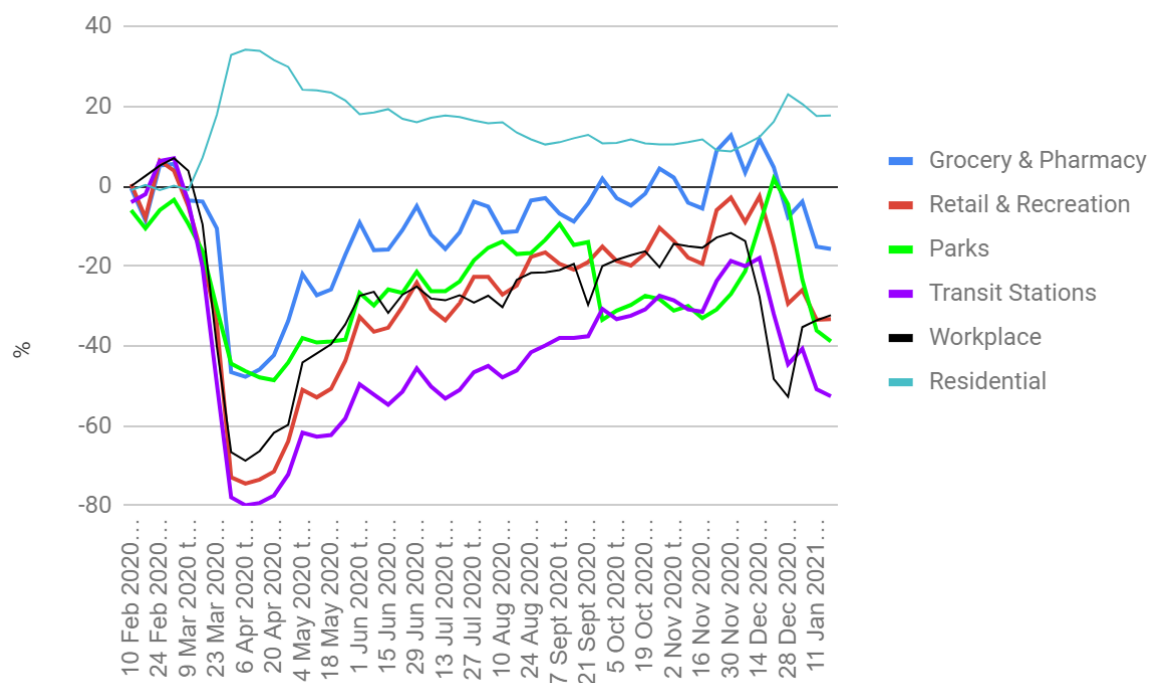


Figure 3: COVID-19 South Africa Google Mobility Index from 10 February to 11 January 2021
 Source: Author Data from Wits University (2021)

In response to the decline in tourism demands, most companies instituted cost-cutting measures such as furloughs, salary cuts, retrenchments and other such measures. 'Salary cuts and suspensions during the lockdown period left many people with no income to spend on travel and tourism often considered a luxury by many. Uncertainty and job losses are another factor that led to poor uptake of the tourism product even under lockdown level 1, which allowed domestic tourism and some international travel modicum. The consumer confidence index plunged from -9 in the first quarter of 2020 to an all of -33 in the second quarter and easing off to -23 in the third quarter as a result of COVID-19 (Bureau for Economic Research, 2020).

The decline in consumer confidence is an indicator of how depressed consumers were about the state of the economy, which had an adverse impact on tourism product purchase as tourism is often considered a luxury and often sacrificed when making budget priorities in

challenging economic conditions. The poor performance could also be attributed to travel fear as some people feared going out, which could expose them to infection risk. This was not unique to South Africa alone. According to Zheng, Luo and Ritchie (2021), COVID-19 induced travel fear amongst tourists, which impeded tourism recovery.

As shown in Figure 3, one of the sectors affected by the lockdowns were botanical gardens, nature reserves and national parks. This resulted in cash challenges for the national parks, which get a substantial amount of its finances from gate takings and other park visitors' charges. To maintain its mandate of biodiversity conservation of biodiversity, South African National Parks reprioritised R961 million to cater for a decline in tourists revenue due to the impacts of COVID-19 on travel to national parks (Parliamentary Monitoring Group, 2020). The announcement of level 2 lockdown restrictions beginning the 17th of August 2020 opened up interprovincial travel. The announcement of level 2 resulted in a rush to national parks, which resulted in the booking platform crashing due to increased demand for accommodation in national parks (SABCNews, 2020).

Although the demand grew at some point between September and December 2020, the demand was not enough to offset earlier losses. Accommodations in national parks could not take on 100% bookings in a strive to ensure physical distance in accommodation establishments. This affected revenue collection by South African National Parks. There were fears that this could adversely affect conservation efforts and programmes in a number of national parks. The results concur with earlier findings by Smith et al. (2021), who pointed out that national parks were facing financial difficulties as a result of low visitor numbers due to the adverse impact of lockdowns and the COVID-19 induced challenges. Given the centrality of national parks to biodiversity conservation and heritage protection, there is, therefore, a need to provide urgent funding mechanisms to ensure that national parks in the country continue to play their critical conservation role. Such funding could be sourced from either the private sector, government, private citizens and other international institutions to ensure that critical work such as anti-poaching activities is unhindered by the COVID-19 disturbances.

Impact of COVID-19 lockdowns on South Africa's aviation industry

The aviation industry, which forms part of the tourism industry's travel sector, was one of the hardest hit. The sector witnessed the collapse of more than three major airlines: South African Airways (SAA), British Airways (operated by Comair) and its sister company Kulula and South Africa Express due to COVID-19. South African Airways, a national flagship airline, had not made a profit for close to a decade and heavily depended on government bailouts due to political interference and poor management. The advent of COVID-19 crippled the airline that was already under bankruptcy protection. From March 2020 to March 2021, the airline hasn't made any commercial flights which worsened the airline's fortunes. The pandemic forced the airline into bankruptcy and was subsequently placed under administration. In order for the rescue plan to work, the government of South Africa, which owned the airlines, needed about US\$0.6 billion to fund the restructuring plan. External investors were therefore sought to fund the new airline meant to replace South African Airways. The South African Express, a sister company to SAA, was placed under business rescue on 6 February (Flight Global, 2020) before the tide of COVID-19 sent the plans off rail forcing the airline into liquidation in May 2020.

On the other hand, one of the most efficiently run commercial airlines in the country and the region, Comair, ran into trouble when the COVID-19 strike in March 2020. The COVID-19 pandemic forced Comair into voluntary business rescue in May 2020, aiming to safeguard the company and its stakeholders from an inevitable collapse (Comair, 2020). According to Aviation Tribune (2020) report, the plan was to get Comair back into the skies

by December 2020, and it reduced its workforce from 2 200 employees to 1 800 through voluntary retrenchment and early retirement programmes. To make the plan a success, Comair required about US \$82 million from external sources. The financial troubles of Comair were compounded by the grounding of 737 MAX 8, where the company had purchased 8 Max 8 aircraft as part of its fleet renewal programme for about US\$0.53 billion (R9bn) (Business Day, 2020), which increased its financial vulnerability as it had recorded a loss of about US\$37 million (R564 million) in May 2020. The situation is not unique to South Africa, as, across the world, airlines faced rating downgrades and other operational challenges due to the pandemic (Dube, Nhamo & Chikodzi, 2021; da Silveira Pereira & de Mello, 2021).

It is the ravaging impact of the national and proxy regional airline industry, which is of concern to the tourism and airport industry. These had a serious impact on the mobility of tourists once the industry opens up. Given that the British Airways operated by Comair and SAA were the most prominent commercial airlines prior to the pandemic that connected the world to the region and the domestic tourism destinations, their problems had a potential negative impact on the access of tourists to destinations (See Figure 1). Given the challenges faced by the commercial airlines in South Africa, the market was left open to low-cost airlines such as FlySA Fair and Mango and one other commercial airline SA Airlink.

South Africa has a relatively large domestic air travel market that has been growing for years. Its offering comprises budget and commercial airlines. The dominating airlines include SAA, SA Airlink, British Airways operated by Comair, FlySafair and Mango in the main. The collapse of commercial large commercial airlines could leave the market dominated by budget airlines. Due to demand and supply forces, this could push up the costs of travelling and hurt domestic and regional tourism growth when aviation is supposed to provide the much-needed impetus to domestic and regional travel. Some destinations would also suffer immensely as they weren't serviced by the predominant budget airlines.

It is important to note that the pandemic's adverse impact on the aviation sector had an adverse impact on various airport companies in South Africa and the region. The Airport Company of South Africa sounded alarm bells when it announced its financial results for the year ending March 2020 as it indicated that it was setting aside R270-million in provision for doubtful debts (Airport Company South Africa, 2020). This was amidst a decline in arrivals, departures and closure of various airport shops. The loss of parking fees had a considerable impact on airport revenues. Airports have a considerable business that was disrupted by COVID-19 across the world with financial and long time operational implications for the present and the future. There was, therefore, a need to provide stimulus aid in the form of finances to allow the airports to retool and prepare the necessary technology in ensuring biosafety control at airports. This includes purchasing screening equipment, purchasing contactless technology to ensure touchless travel, and ramping up efficiency as part of initiatives to reduce tourists' chances of infection at airports.

The impact of COVID-19 on the South African tourism and hospitality industry

The aviation industry has not been the only casualty of COVID-19, as the closure of borders and ports of entry also had a devastating impact on the hospitality industry. An initial survey by the Tourism Business Council of South Africa that surveyed 1610 respondents revealed that at the end of March, soon after the announcement of the lockdown on the 26th of March, the tourism industry was thrown into financial turmoil (Tourism Business Council of South Africa, 2020). As a consequence of the pandemic, 83% of tourism businesses reported a 50% decline in revenue on a year to year basis, with 2019 as a base year. The remainder indicated that they had realised a 100% revenue loss in their business operations in March. Consequently, 54%

of tourism businesses were unable to meet their fixed costs expenses, whereas 58% of tourism businesses were unable to service their debt in March.

The prolonged locked down and closure of leisure tourism that only opened in August led to further deterioration of the situation and led to severe financial losses. Stats SA (2020) report showed that as of May 2020, revenue losses by the accommodation sector had plunged to record lows. Figure 4 shows that between April and July 2020, most accommodation establishments collected less than 10% of the revenue they had collected in 2019. Business picked up between August and October 2020 as domestic and international travel was opened during the same period. Even though gains were not adequate to offset losses, there are clear signs of the sector’s resilience, with most gains being realised in Caravans, campsites and guest farms (Figure 4). Given that most campsites are located in national parks and game farms, this is expected to have resulted in improved revenue standing for many conservations areas such as national parks and private nature reserves. This could have provided some needed relief from the continued losses that characterised the sector post- 11 March pandemic declaration by the World Health Organization.

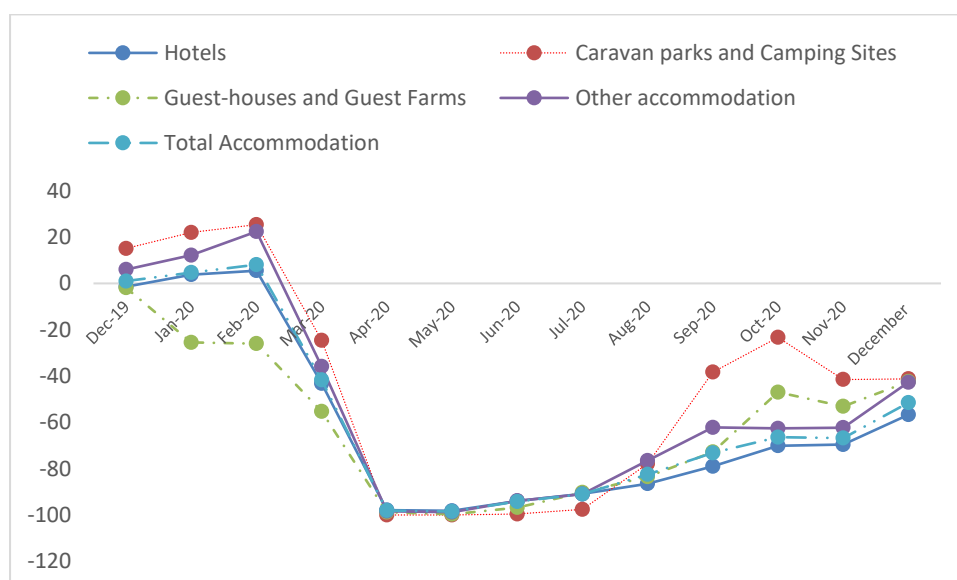


Figure 4: Year-on-year percentage change in income from accommodation at current prices by type of accommodation due to COVID-19
 Source: Author Data from Stats Sa.

There were serious revenues losses across the accommodation industry, running into billions of Rand, with the worst month being April and May 2020. The opening up of corporate travel under level 3 did very little to cheer up the accommodation industry in June as the industry was still operating at less than 10%, with revenue levels remaining very low (Figure 4 and 5).

Revenue within the accommodation sector slightly improved with easing lockdown restrictions, with the most improvements witnessed in October after lockdown measures were instituted, which paved the way for domestic and some international travels. The year 2020 was the worst financial year in recent memory for the accommodation sector. Therefore, any recovery efforts needed to understand the need for an injection of liquidity to allow the industry space to fund operational and capital expenditure. COVID-19 presents a unique situation whereby accommodation establishments need retooling through the purchase of sanitising equipment to cater for deep cleaning needed to keep accommodation establishments clean and safe.

Therefore, it is not surprising that some tourism companies with large hotel portfolios experienced losses which called for restructuring and retrenchment. Sun International, a hotel company with a footprint across South Africa, indicated that it had realised a half year decline of R3.7 billion, down from R8.5 billion. The EBITDA (earnings before interest, taxes, depreciation, and amortisation) declined 96% from R2.1 billion to R79 million. Consequently, the company retrenched 2300 employees to bring down its wage bill (Fin 24, 2020). In addition, the company shelved all capital investment projects and resorted to selling some of its assets to raise the required liquidity to try to make up for the shortfall. The picture was not very different across the sector.

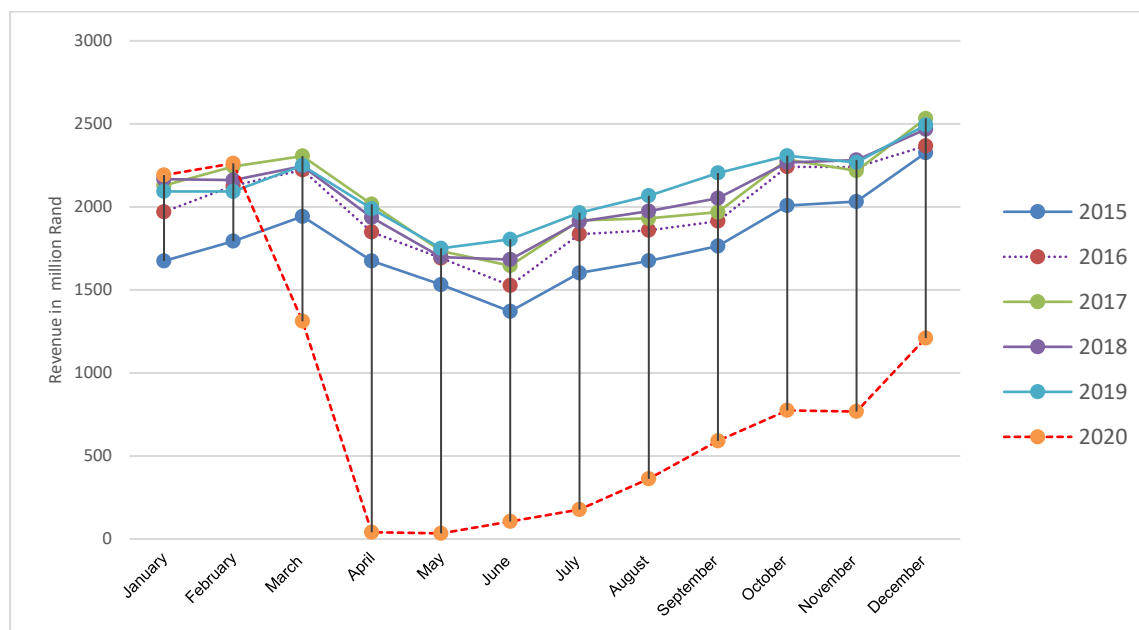


Figure 5: Impact of COVID-19 on South Africa accommodation industry revenue
 Source: Author Data from Stats SA.

The iconic Mount Nelson Hotel dismissed 154 of its 251 employees at the peak of the pandemic. Another hotel group City Lodge reported a profit of R205.5 million in 2019, witnessed a turn in fortunes, realising a plunge of R486.6 million in losses in the financial year that ended in June (Business Day, 2020b). Consequently, the company was looking for a capital injection of R1.2bn cash injection from shareholders with the expectation that it will break even in the last quarter of its 2021 financial year, which ends in June 2021. There were early signs of recovery which resulted in the occupancy rate rising from 4% between March and June and rising to 7% in July and 10% in August, with the expectation that this figure would rise further in September as larger parts of the economy opened. However, in March 2021, City Lodge went on to report a R550 million loss in the year 2020 due to subdued bookings as the pandemic persisted (Business Day, 2021a).

There were also concerns over the survival rate of tourism establishments in the disaster-ridden Western Cape, which experienced a double tragedy after the ravaging impact of the worst drought in the area dubbed Day Zero (Dube, Nhamo & Chikodzi, 2020b) and the occurrence of COVID-19. The drought financially compromised several businesses by the time the pandemic struck, and they were vulnerable to business failure. Cape Town Tourism (2021) report shows that as of January 2021, about 70% of tourism businesses were open, with 30% closed down either due to lack of adequate market and permanent closures. The adjusted level

3 lockdown that was instituted at the end of 2021 was estimated to have costed Cape Town Tourism about R2 billion and left 11,583 people jobless as the industry was largely driven by the domestic market, which accounted for 68% of the bookings market share and the remainder being the international market.

Tourism recovery prospects in South Africa

The country's tourism industry is robust and has demonstrated its capacity to recover and rebound faster than any other economic sector. The advent of COVID-19, while posing one of the greatest threats to the industry, provided the sector with an opportunity to restart and find innovative ways to weather the coronavirus pandemic. The discovery of vaccines is likely to provide much-needed relief and provide an impetus for recovery. If well adopted, vaccines coupled with health and safety protocols could provide the opportunity to operate optimally and reduce the losses seen in the year 2020. The gazetting of the draft National Norms and Standards for the Safe Operations of Tourism Sector in the context of the Coronavirus COVID-19 and beyond by the National Department of Tourism (2021) is a step in the right direction for the sector as it battles reopening.

The standards will allow the sector to adopt similar standards and ensures the safety and health of tourists. This could likely trigger the necessary impetus required to encourage people to travel. Shin and Kang (2020) reiterated the need for ensuring the need for health and safety as crucial to tourism recovery as COVID-19 triggered safety anxiety amongst tourists (Matiza & Kruger, 2021). According to Seyitoğlu and Ivanov (2020) proposed the use of robots in service delivery to ensure physical distance and inspire a sense of safety between tourists and hospitality employees. Besides adopting safety protocols, there is a need for innovative ideas to kick start the industry. Part of the recovery process needs to take onboard new technological development in tourism destination marketing and branding using various affordable mediums. These rebranding efforts need to take onboard tourists requirements for health and safety. The rolling out of the country's vaccination programme and achieving herd immunity is one component that tourism branding and marketing efforts could be anchored on.

Given that the recovery process is likely to be prolonged and slow, particularly in the international tourism market, there is a need to develop a marketing mix that focuses on the domestic, regional, and international tourism market. This requires a closer look at the pricing model to suit the domestic and regional tourism market demands. There are also opportunities to tap into the advantages posed by working from home situation. The approach that is being pursued by Cape Town Tourism in partnership with Airbnb of remote working vacation is a case in point (Business Day, 2021b). Through this initiative, Cape Town is marketed as an ideal place for remote working and vacation.

Conclusion and recommendations

The study was aimed at examining the impact of COVID-19 on the South African tourism industry and its prospects for recovery. The study found that COVID-19, which affected the tourism sector's supply and demand, resulted in business losses throughout the tourism value chain. The pandemic ushered in a new era of losses within the tourism industry due to the prolonged lockdown, which resulted in various tourism industry sectors, which led to untold suffering in the various sectors of travel, tourism, and hospitality. The forced lockdowns resulted in many airlines facing liquidity challenges and consequently being put under business rescue and or facing liquidation. This development is likely to affect local and regional tourism destinations serviced by the affected airlines. This is concerning as the tourism industry resumes operations, there will be demand for fast, efficient and sustainable transport that is also sustainable. The shedding of labour in the aviation industry as companies battle to

remain afloat is also worrisome as it threatens the progress made thus far with regards to the sector's contribution to employment creation over the years. This could further increase poverty in the region as the country and the region moves into the Decade of Action for Sustainable Development Goals, which is due to lapse in 2030.

There is a need for triggers to kick start the tourism industry, and the government has a critical role to play and could deliberately make travelling attractive and affordable by waiving numerous levies and taxes that could reduce air tickets prices and other tourism products. As the sector recovers, international financing could prove crucial in providing much-needed liquidity. Such funding could come out in various forms, such as Special Drawing Rights or Fund Against COVID-19 Economics. Such funding, however, should be specially designed to meet every business need without leaving anyone behind. Vulnerable groups such as women and youths need special attention in this regard. Small to medium enterprises can also be given special attention, given their high likelihood of business failure.

While prospects for recovery for South African tourism are high, tourism and hospitality will never be the same, and investment into health and safety must be the anchor of recovery. Contactless travel means demand for the sector to invest more in technology to reduce risk and ensure customer confidence. Hotels and restaurants need to invest more resources in ensuring adherence to cleaning and other safety protocols. The delivery of vaccines, although slow, offers some hope for the tourism industry and the general economy. The chances of South Africa being a destination of choice for travellers across the world are higher than the rest of the region, given its geo-political advantages as a gateway destination to the region.

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