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COVID-19 and Changing Tourism Demand: Research Review and Policy Implications for South Africa

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Abstract

The tourism sector in South Africa has experienced the devastating impacts of the COVID-19 pandemic and in response national government is charting initiatives for a recovery plan. In common with other countries the promotion of domestic tourism is a core focus. Arguably, the magnitude of the pandemic will reshape existing patterns of tourism demand and supply which need to be understood and researched for designing appropriate policy interventions. Against the backcloth of the continuation of the COVID-19 pandemic, the need for recovery strategies, and the increasing focus on domestic tourism, the aim in this article is to interrogate COVID-19 impacts on the demand-side of tourism looking at changes in consumer demand and of intentions to travel. A desk top review is conducted of research produced by national governments, international organisations and of academic surveys completed in over 20 countries. The research findings are discussed in four themes, namely, (1) risk perceptions and the new tourism psyche; (2) travel intentions and changing mobilities; (3) travel intentions and changing patterns of demand; and, (4) the contactless economy and 'untact' tourism. The paper concludes with eight sets of policy recommendations for South Africa.

Keywords: COVID-19; tourism demand; tourism psyche; mobilities; South Africa

Introduction

In common with the rest of the world, the tourism sector of South Africa continues to experience the debilitating impacts of COVID-19. Indeed, as is the situation across the world the pandemic represents a crisis event that potentially is set to transform South Africa's tourism sector as well as the context in which it functions (Rogerson & Rogerson, 2020a, 2020b, 2021). The unfolding negative effects of the pandemic are evidenced in the results of the tourism industry surveys conducted by the Department of Tourism, Tourism Business Council of South Africa and International Finance Corporation (2020a, 2020b, 2020c). Undoubtedly, the magnitude of the pandemic will reshape existing patterns of tourism demand and supply which therefore need to be understood and researched for designing appropriate policy interventions for recovery (South African Tourism, 2020). Suggestions for recovery strategies which are put forward by the International Tourism Research Network include focused marketing initially for domestic and regional markets (Bieger & Laesser, 2020). It suggests the need to encourage visiting friends and relatives (VFR) travel in order to build traffic and link with resident needs to visit family following lockdowns (Hall, Scott & Gössling, 2020). In addition, it is argued local residents should be encouraged to visit local attractions because of their awareness of the local epidemic situation and so might be more confident to have some tourism-related activities with family in local areas (Bieger & Laesser, 2020). 'Localism' and the development of more localised forms of travel is likely to be a significant theme within successful tourism recovery strategies (Higgins-Desboilles, 2020a). Overall, most international scholars are of the opinion that destination recovery must begin with domestic markets and followed by regional tourism markets (Dupeyras, Haxton & Stacey, 2020; Gössling, Scott & Hall, 2021; Rogerson & Baum, 2020).

Several national governments and international organisations – most notably the United Nations World Tourism Organisation (UNWTO, 2020a, 2020b) – currently are conducting research on best practice for reviving the tourism industry and in particular with a specific focus on domestic tourism as a basis for tourism recovery. Those 'best' - or perhaps more appropriate - 'good' practices necessarily must be evidence-based. Arguably, the magnitude of the pandemic will reshape existing patterns of tourism demand and supply which need to be understood and researched for designing appropriate policy interventions. In South Africa, the Tourism Recovery Action Plan acknowledges the severity of the COVID-19 pandemic on the sector as a result of the halt of tourism activities and businesses shutting down their operations (South African Tourism, 2020). Domestic tourism is recognised as a beacon of hope and a catalyst for the recovery of the tourism sector as it reopens gradually amidst the continued COVID-19 infections (Department of Tourism et al., 2020c). This optimism concerning the domestic sector necessitates that South African role players reflect on opportunities and challenges that lie ahead to shape the sector's supply and demand in order to meet the needs of domestic tourists. It is against the background of the continued rolling of the COVID-19 pandemic, the need for recovery strategies, and the increased focus on domestic tourism that the aim in this article is to interrogate COVID-19 impacts on the demand-side of tourism in relation to changes in consumer demand and of intentions to travel. The task is to provide a state of the art review with the outcome of offering a number of policy recommendations for the context of tourism recovery in South Africa. The next section describes the research approach that was adopted for this demand-side investigation. There follow four sections of thematic research findings, a conclusion and policy reflections for South Africa.

Research approach

The demand-side focus was pursued through undertaking a desk top review of what has been described as a 'tsunami' of research studies undertaken/are currently being pursued on COVID-19 and consumer travel intentions in various parts of the world (Bausch, Gartner & Ortanderl, 2020; Korinth, 2020; Persson-Fischer & Liu, 2021). Since lockdowns began in March 2020 a large number of investigations using online surveys of travel intentions have been done by several different international organisations as well as by others working on behalf of national tourism agencies. In addition, there has been a major burst of academic studies similarly using online surveys to examine aspects of possible changes in consumer demand in relation to COVID-19. Although crises in tourism are a regular occurrence and many destinations even have developed tactics and strategies of resilience the COVID-19 pandemic is viewed as different and unique because of its dramatic spread and occasioning of widespread collapse as well as for its potential for reshaping many segments of tourism demand and supply (Gössling et al., 2021; Kreiner & Ram, 2020). Understanding tourism behaviour during and after major crises such as COVID-19 therefore is an essential element for planning destination recovery (Golets et al., 2020). COVID-19 reaction policies have had the effect of putting the tourism industry into a form of forced hibernation (Bausch et al., 2020). Currently tourist behaviour and intention to travel as well as destination perceptions are dictated by pandemic-related health concerns.

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

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

Table 1: **International academic research studies on Covid-19 and consumer demand**

Country	**Research Study**
Algeria	Madani, Boutebal, Benhamida & Bryant 2020
Australia	Beck & Hensher, 2020; Butler, 2020; Butler & Szili, 2020; Flinders University, 2020; Sigala, 2020
Austria	Neuburger & Egger, 2020
Brazil	Golets, Farias, Pilati &Costa, 2020
Bulgaria	Ivanova, Ivanov & Ivanov, 2020
China	Hong, Cai, Mo, Gao, Xu, Jiang & Jiang, 2020; Li, Nguyen & Coca-Stefaniak, 2020; Maltseva &Li 2020; Wen, Kozak, Yang & Liu, 2020; Zhan, Zeng, Morrison, Liang & Coca-Stefaniak, 2020; Zhu & Deng, 2020
Czechia	Vashar & Šťastná, 2020
Egypt	Elsayeh, 2020
Germany	Neuburger & Egger, 2020
India	Das &Tiwari, 2020
Indonesia	Kusumaningrum &Wachyuni, 2020; Wachyuni &Kusumaningrum, 2020; Yuni, 2020
Italy	Peluso &Pichierri, 2020

Malaysia	Ahmad, Jamaludin, Zuraimi & Valeri 2020; Awan, Shamim & Ahn, 2020; Nasir, Nasir, Nasir & Nasir, 2020
Poland	Kowalska & Niezgoda, 2020; Korinth, 2020; Wojcieszak-Zbierska, Jęczmyk, Zawadka &Uglis, 2020
Portugal	Silva, 2021
Serbia	Perić, Dramićanin & Conić, 2021
Slovenia	Turnšek, Gorenak, Brumen, Mekinc, Rangus &Štuhec, 2020
South Korea	Bae & Chang, 2020; Jeon & Yang, 2021; Sung, Kim & Kwon, 2021
Spain	Sánchez-Cañizares, Cabeza-Ramírez, Muñoz-Fernández & Fuentes-García, 2020
Switzerland	Neuburger &Egger, 2020
Turkey	Jafari, Seydam, Erkanli &Olorunsola 2020; Kement, Çavoşoğlu, Demirağ, Durmaz & Bükey 2020; Özdemir & Yildiz, 2020
USA	Canina & McQuiddy-Davis, 2020; Craig, 2020
Zimbabwe	Woyo, 2021

Source: Authors

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

Overall, in terms of this expanding academic literature the richest available material at present is that pertaining to Australia, China, South Korea, UK and USA. Taken together the results from these accessed studies undertaken across 23 different countries (including three from Africa) by international agencies, national tourism bodies as well as academic investigations reveal an emerging consensus on the shifting demand side of domestic tourism in the COVID-19 environment. As a whole they disclose several themes which are common across countries in terms of risk perceptions and consumer travel intentions as well as of changing demand preferences in the context of the risks associated with travel in the continuing COVID-19 crisis. The findings from this desk-top research give essential insight into domestic tourist demand behaviour in the COVID-19 era. The next sections survey this research and its key findings in respect of four themes, namely (1) risk perceptions and the new tourism psyche; (2) travel intentions and changing mobilities; (3) travel intentions and changing patterns of demand; and (4) the contactless economy and untact tourism.

Findings: Risk perceptions and the new tourism psyche

It is widely acknowledged that 'perceived risk' will impact consumers' intention to travel as well as their destination perceptions (Perić et al., 2021; Turnšek et al., 2020; Wen et al., 2020; Zhan et al., 2020). According to Neuberger & Egger (2020: 3) risk perception can be understood as "the subjective evaluation of the risk of a threatening situation based on its features and severity". For Bae & Chang (2020: 3) it is defined as individuals' perception of the probability that an action may expose them to a threat that can impact travel decisions "if the perceived danger is deemed to be beyond an acceptable level". Arguably, perceived risk is associated with a tourist's perception of uncertainty and the potential negative outcomes from the consumption of particular travel options (Matiza, 2020). Risk perception can influence an individual's behaviour and is of central concern for international travellers (Wen et al., 2020;

Perić et al., 2021). It can be perceived differently based on individual characteristics (age, gender), social structures and cultural context. In addition, the role played by the media and the '(mis)info-demic' is critical for shaping public opinion and individuals' risk perception (Chemli, Toanoglu & Valeri, 2020; Williams, Wassler & Ferdinand, 2020). It is argued that this is because mass media "often tends to exaggerate the risk of a situation by selectively emphasizing certain aspects while ignoring others" (Neuberger & Egger, 2020: 3).

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

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

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

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

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

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

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

Findings: Travel intentions and changing mobilities

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

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

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

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

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

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

Findings: Travel intentions and changing patterns of demand

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

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

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

These core trends as revealed in cross-country studies and by large-scale monitoring investigations are reinforced by a host of scholarly studies which are nationally focused. For the USA Craig (2020: 1) reports that "present-day travelers prefer distance from others, natural space, and outdoor recreation" pointing to new opportunities around camping tourism. In

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

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

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

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

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

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

Findings: The contactless economy and untact tourism

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

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

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

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

The following description of untact tourism as it is evolving in South Korea is offered by Bae and Chang (2020: 2): Korean citizens have started to engage in untact travel activities to satisfy their thirsts for travel and leisure while minimizing the possible risks from COVID-19. Even during the pandemic, people left for isolated healing by spending time in nature, staying in accommodations exclusively reserved for the family, enjoying outdoor camping and road trips, or travelling alone. Local tourism governments also have promoted regional hiking trails, forests and parks as their untact tourism destination, and have also offered information for local scenic driving routes for untact leisure. In addition, hotels have offered untact services such as private dining rooms, buffet room service, and live chat concierge service. Health authorities have announced a code of conduct for 'untact tourism' highlighting practical recommendations for safe travel experience based on in-travel social distancing (eg. keeping a space between tables in cafes and restaurants, limiting the number of visitors for a day, no touting at markets, using private amenities at accommodations, and encouraging outdoor activities rather than indoor activities).

The conclusions and implications of this most detailed research on untact tourism in Korea merit careful policy consideration. Bae and Chang (2020: 15) state as follows: Tourism practitioners may need to consider untact tourism as a new paradigm that accommodates individuals' need to minimize their perceived risks as well as satisfy their need to travel. It is not the mere removal of service encounters but, in fact, could be a premium service based on a high level of customization. For example, breakfast buffets at luxurious hotels used to be one of the most appealing factors to attract customers in Korea, while room service received far less attention. However, because customers want to secure their personal spaces, room service of the breakfast buffet has gained much popularity since the outbreak of COVID-19. Individuals will prefer to join tourism programmes in a small group on a reservation basis. Hotels may need to offer a personalized room based on customers' needs to ensure safety. Strictly certified services, spaces or programmes in terms of their safety would meet the increased demand for untact tourism. Tourism practitioners would be able to drive the message regarding their efforts in practicing untact as a safeguard for tourists' safe travel experiences.

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

Conclusion and policy reflections

COVID-19 is reshaping the research agenda of tourism scholars (Persson-Fischer & Liu, 2021; Sharma, Thomas & Paul, 2021) including for African tourism researchers (Rogerson & Baum, 2020). The pandemic has fostered a heightened level of awareness of how important tourism experiences and consumption are for people and local communities (Saarinen & Wall-Reinius, 2021). In addition, it continues to exert drastic impacts upon the tourism sector and is projected to have significant potential to reform future landscapes and servicescapes (Gössling et al., 2021; Kowalska & Niezgoda, 2020; Sinha & Nair, 2020).

Considerable international evidence already exists of shifts taking place in consumer demand as well as in the character and patterns of domestic tourism occurring in North America, Europe and Australia. Arguably, certain other changes may emerge in the unforeseeable future. Among others Wen et al. (2020) stress that COVID-19 can be expected to have far-reaching impacts on domestic tourists' consumption behaviour albeit recognising differences with individual's cultural backgrounds. As is stressed by Yeoman (2021), with COVID-19 the future will be different to the past. Notwithstanding the potential for vaccines, the lingering impacts of the pandemic on the tourism psyche will ensure that a return to the pre-COVID-19 normal should not be taken for granted (Zenker & Kock, 2020). Sigala (2020:1) stresses "tourism demand is highly heterogenous and so, the impacts and transformations caused by the COVID-19 are varied across different tourism markets". For leisure travel the prospects are that with COVID-19 not being eradicated the measures of social distancing, restrictions or avoidance of large gatherings will influence where, why and how people travel, what they do and how they experience tourism destinations (Jeon & Yang, 2021; Sigala, 2020). Business tourism is the segment that is most unlikely to go back to the old normal as it is expected to endure the major long-term negative impacts as companies assess what is essential and non-essential travel (Rwigema, 2020). In the context of the global South, however, it must be appreciated also that the volume of future domestic tourism demand will be related closely to the performance of the national economy (Woyo, 2021). Under conditions of low or no economic growth, which will be exacerbated by COVID-19 impacts, the potential is reduced for expanding demand for any tourism products.

Several important shifts have been identified in this research review across the international experience concerning the tourist psyche and consumer travel habits. These changes are driven by issues of safety, health and hygiene which are remoulding consumer demand globally and without doubt are also in play in South Africa. A number of policy recommendations emerge as conclusions from this study which can feed into debates around tourism recovery planning (South African Tourism, 2020). Eight specific recommendations can be offered. First, as it is inevitable that the importance of automobilities will increase in South Africa there is a need to recognise the potential growth of drive tourism and initiate a set of policy interventions to support a window of opportunity that exists currently for supporting this particular form of domestic tourism. Key initiatives include revisiting tourism route planning, enhancing signage, improving local governments awareness of its importance, and working on improving road infrastructure and regarding measures around road safety and road accident prevention. Second, it is evident that opportunities exist for addressing the uneven geographical spread of tourism through domestic drive tourism as tourists in the COVID environment seek out less crowded places. Therefore, it is essential that the awareness be improved of local governments in rural and remote areas – most especially those with tourism products around nature tourism – of a vital window of opportunity to market those attractions around 'natural open space', 'tranquillity' and 'seclusion' to potential domestic tourists. Discovering and recommending tourist routes based on untact such as drive routes, walking or bicycling trips is recommended for all visitors. In addition, following recommendations that have been made in other countries consideration should be given that local governments implement a 'safety tourist destination' certification system.

Third, the inevitable expansion of tourism in pristine environments such as South Africa's national parks and nature reserves will result in particular challenges for protected areas. In this regard a monitoring study is required of the impacts of the potential expansion of domestic tourism flows into protected areas especially in terms of ensuring their long-term sustainability as spaces for improving physical and emotional wellness and mental health. In addition, such an investigation must consider that the major beneficiaries of enhanced health and welfare inevitably will accrue to society's elites, more affluent groups and the middle classes. Ensuring that such benefits also filter down to South Africa's lower income and disadvantaged communities will be an important future policy challenge. This point is further reinforced by significant research findings on travel intentions of domestic tourists in Africa which point to persistent challenges of affordability and willingness to pay for most tourism products by the economically challenged domestic consumer market (cf. Woyo, 2021). Four, as the demand for visits to national parks, green spaces and 'tourism in nature' will increase because of physiological and psychological benefits and for improvement of mental health opportunities exist for the expansion of commercial nature tourism as a provider of nature therapies. Research investigations are needed into the experiential components and commercial design for different market segments of such nature forms of tourism. Existing Australian research and debates provides a valuable starting point (Buckley, 2020; Buckley & Westaway, 2020).

Five, for city tourism the potential shifts in the travel behaviour of visitors offers opportunities to change the intra-city spatial distribution from major attractions to less visited spaces. Such a development could be positive as it provides areas with new options for value creation and even allow cities to develop a more diversified portfolio of tourism products which may make them more resilient as well as provide their residents with a greater range of local leisure opportunities and experiences (Smith, 2021). It is recommended therefore that investigations be pursued into opportunities to develop new products such as creative tourism and 'off the beaten track' tours in order to support the visitor economy of cities as well as increase the geographic spread of tourism impacts in South Africa's major cities. Six, in relation to popular tourism attractions – whether in cities or national parks – it is essential that support be given for the installation of technologies to support flexible tourism demand management in terms of gathering real-time data in order to enact control measures to minimize congestion and to maximise social distancing.

Seven, as 'aquamobilities' in the form of cruise tourism appear unlikely to regain their pre-COVID-19 popularity it is argued that government departments involved in Operation Phakisa and the 'blue' or oceans economy urge the abandonment of plans for building new cruise ship terminals for South Africa. In addition, it is recommended the Department of Tourism must revisit its Coastal and Marine Tourism Strategy which feeds into planning frameworks around the blue economy (Rogerson & Rogerson, 2019). Finally, for re-igniting the future flows of international tourism with a view to promoting a movement towards 'untact tourism' in South Africa it is recommended that national government should 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)**.** Furthermore, a process is required to begin the identification of safe, nature-friendly 'untact' tourism attractions in South Africa for the purpose of future tourism marketing to Asian visitors in particular.

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