

Covid-19 and Local Business Responses: Evidence from South Africa's most Tourism-Dependent Locality

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Abstract

In emerging tourism scholarship around COVID-19 one of the major clusters of research surrounds issues of adaptation. Tourism businesses are compelled to adapt to shifts in consumer demand as well as government regulatory changes. The objective in this paper is to investigate the responses and adaptations to the impacts of COVID-19 of tourism businesses in South Africa's most tourism-dependent locality. The research reports on 20 qualitative interviews undertaken with a cross-section of tourism enterprises in Bela-Bela Local Municipality, Limpopo province, which is overwhelmingly oriented towards the market of domestic tourism. Major results are local businesses are financially negatively impacted by the subdued nature of domestic leisure travel together with the near total collapse of business travel as well as the imperative to conform to new COVID-19 safety and health protocols. Adaptive responses have included downsizing of businesses, including worker retrenchments, price-cutting, limited initiatives towards product diversification, energetic social media marketing and repurposing of properties. Key challenges for Bela-Bela tourism enterprises relate to immediate financial issues and most especially in the context that minimal support has been provided by national government to assist their business survival. Future business prospects are not viewed favourably such that business closures and a hollowing out of the tourism enterprise base accompanying job losses in tourism appear inevitable.

Keywords: COVID-19; adaptation; tourism businesses; domestic tourism; business survival

Introduction

It is simply the case that "the COVID-19 pandemic has changed the whole world" (Kvirkvelia & Tsitsagi, 2021: 27). As Jeon and Yang (2021) observe COVID-19 led to drastic social changes in modern society, including restrictions on people's movement, the mandatory wearing of masks when outside, and the increased untact interactions amongst people. In relation to emerging economies the "COVID-19 pandemic has the potential to be the largest

macro-economic shock of the past 100 years” (Hevia & Neumeyer, 2020: 29). The COVID-19 outbreak has decimated the international tourism economy as fears associated with the spread of the virus coupled with mobility and travel restrictions put the tourism industry in a precarious situation. As noted by Das and Tiwari (2020: 1) the implementation of prolonged international travel bans alongside restrictions on domestic mobility “have been the most widely used pandemic mitigation measures”. Higgins-Desboilles (2020: 65) views COVID-19 “as a possible game-changer for globalisation as well as global tourism” and that it offers “a chance to turn away from the hegemony asserted by market forces for their profit and return to an earlier vision of tourism as a social force”.

Noy, Doan, Ferrarini and Park (2020) assert that the economic risks associated with the continued pandemic are considered highest in the poorest parts of the developing world with the greatest threats seen as to economic development prospects in sub-Saharan Africa. Across Africa the danger is that the long-term ramifications of COVID-19 will be to reverse development gains made over previous decades and deepen the continent’s chronic challenge of poverty (Buheji, da Costa Cunha, Beka, Mavrić, de Souza, da Costa Silva, Hanafi & Yein, 2020). The crisis is having significant negative effects on African tourism (OECD, 2020). Recently, in a seminal article the particular dangers are highlighted of potentially negative irreversible impacts on conservation and protected areas in Africa as a result of communities threatened by the loss of economic benefits through participating in nature tourism now reconsidering conservation efforts (Hockings, Dudley, Elliott, Ferreira, Mackinnon, Pasha, Phillips, Stolton & Yang, 2020). Fletcher, Büscher, Massarella and Koot (2020:44) remind us that one of the “most significant and potentially damaging implications of the COVID-19 ecotourism contraction concerns the loss of revenue to communities living in or near conservation critical areas”. For Southern Africa, Musavengane, Leonard and Mureyani (2020) draw attention to the pandemic’s impacts on vulnerable communities that are reliant on tourism wildlife and natural resources for their livelihoods and point to the urgent need for reflecting on COVID-19’s multiple environmental effects within the African context. Overall, there is a consensus that the economies of tourism-dependent destinations and localities are those most exposed to the global havoc unleashed by the pandemic (Mooney & Zegarra, 2020; Rogerson & Rogerson, 2020a; Rogerson, 2021).

Literature review

As a highly vulnerable industry which is subject to “numerous environmental, political, socio-economic risks, tourism is used to and has become resilient in bouncing back from various crises” (Sigala, 2020: 312). Kwok and Koh (2021) describe the pandemic as necessitating a bold new direction to be charted by the tourism industry. A cross-country analysis of international tourism and COVID-19 cases and deaths reveals the robust finding that countries exposed to international tourism are those most prone to large cases (Farzanegan, Gholipour, Feizi, Naidoo & Andargoli, 2021). Arguably, Prideaux (2021: 481) maintains that the speed, and type, of government response, effective leaders and extent to which policy and are based on science and flexibility are key in controlling the COVID-19 pandemic, and that where such “elements are breached, control of the pandemic is difficult”. Furthermore, “given the failure of public health measures in many countries, rapid and widespread inoculation appears to be the only solution to halting the COVID-19 pandemic” (Prideaux, 2021: 481). Beyond its public health implications, COVID-19 has reoriented radically the business environment with many tourism businesses closed either on a permanent or temporary basis (Bartik, Bertrand, Cullen, Glaesar, Luca & Stanton, 2020; Tourism Business Council of South Africa, 2021). Butler (2020: 663) observes that the “sudden decline in tourism because of restrictions imposed on travel in response to the Covid-19 pandemic creates opportunities and problems for all

segments of the tourism industry”. Arguably, what is required is a “re-thinking of established ways of operation and marketing, which might enable both a wider participation in tourism for many populations and reduced per capita environmental and social costs, as well as a more inclusive and greener form of tourism generally” (Butler, 2020: 663).

Based upon international surveys of research it is evident that the COVID-19 health crisis is engineering changes in consumer as well as entrepreneur behaviour patterns (Marques Santos, Madrid Gonzalez, Haegeman, & Rainoldi, 2020; Rogerson & Rogerson, 2021). Consumer perceptions of risk associated with the spread of the pandemic have precipitated shifting patterns of mobilities and radical changes in established patterns of consumer demand to which businesses have to adapt (Chebli & Said, 2020; Korinth, 2020; Kowalska & Niezgoda, 2020; Neuberger & Egger, 2020; Sánchez-Cañizares et al., 2020; Godovykh, Pizam & Bahja, 2021; Rogerson & Rogerson, 2021a). With specific regard to consumer behavioural changes several analysts pinpoint the significance of travellers’ avoidance of crowded areas and a pivot away from traditional mass tourism destinations (Chebli & Said, 2020; Zenker & Kock, 2020). In addition, Jeon and Yang (2021: 1) draw attention to a growing trend for the “preference for exploring areas with lower population densities where they can be more active, with more natural environments, exemplified by the increasing tourism in rural areas”. Likewise, Wen, Kozak, Yang and Liu (2020) identify opportunities for those destinations with appealing tourism resources and development potential in terms of promoting their areas relative tranquillity as an opportunity for mental restoration with the stresses associated with the COVID-19 pandemic. In addition to changes in consumer and enterprise behaviour some studies are flagging shifts in residents’ attitudes pointing out that irrespective of the benefits that tourists might bring to destinations, residents express their concerns about local health risks that might accompany the return of tourism (Joo, Xu, Lee, Lee & Woosnam, 2021).

Arguably COVID-19 is restructuring the research agenda of tourism studies, including for African tourism (Rogerson & Baum, 2020). Many traditional tourism-focussed research topics necessarily need to be either expanded or perhaps re-defined with a perspective towards the enduring impacts of the pandemic. In addition, new topics are rising rapidly on the scholarly agenda. Sigala (2020) calls in particular for a deeper examination and understanding of tourism stakeholders. Kwok and Koh (2021) point to the urgent need for more research around the role of agency, including of tourism enterprises. Richards and Morrill (2020: 57) express the view that it is valuable to investigate “the impacts on the crisis on tourism businesses”. An international thematic content analysis of extant COVID-19 literature on tourism disclosed three clusters within the existing body of scholarship (Kwok & Koh, 2021). These clusters of tourism research which are linked to COVID-19 are: (1) ‘ramification’ which includes empirical assessments of the pandemic’s impact on tourism (changes in tourism demand as well as evaluations of the impacts of government support), (2) ‘transformation’ which relates to forward-looking reflections looking at the prospects for restructuring future tourism and offering post-pandemic outlook analysis; and (3) ‘adaptation’ which incorporates application of new technologies as well as analysis of the capacity of destinations and tourism businesses to adapt to change and build resilience.

In South Africa the ramifications of the COVID-19 pandemic on tourism have come under scrutiny with extant literature so far mainly concentrated on ramification and adaptation issues. Recent contributions have examined variously COVID-19’s impact on the hotel sector (Sucheron, 2021a), the hosting of business events (Bartis, Hufkie & Moraladi, 2021), surf tourism (Martín-González, Swart & Luque-Gil, 2021) as well as reflections on potential impacts for cruise tourism (Sucheron, 2021b). The uneven geographical impress of the pandemic in terms of tourism has been explored and points to the vulnerability of tourism-dependent spaces (Rogerson & Rogerson, 2020a, 2021b). The implications of changes in

consumer demand for recovery and policy planning in South Africa are discussed by Rogerson & Rogerson (2021a). Intentions to travel are examined by Bama and Nyikana (2021). These authors highlight that the economic impact of the pandemic on South Africa alerts us to the limits of a recovery strategy focused only on domestic tourism because of issues of affordability of leisure tourism products which represent a deep-seated challenge as many tourism products targeted at international tourists are expensive for the majority of the domestic market (Bama & Nyikana, 2021). The responses of key stakeholders to the pandemic also have catalysed some interest. For example, Hemmonsbey, Tichaawa and Knott (2021) report the responses and adaptations by the country's sport tourism sector and Rogerson & Rogerson (2020b) provide an analysis of government and industry responses to the early development and spread of the pandemic in South Africa. Nyawo (2020) offers another perspective on government response with a specific focus on tour guides.

This paper contributes to South African tourism scholarship on adaptation (Rogerson, 2021). An examination is undertaken of the responses and adaptations to the impacts of COVID-19 of tourism businesses in South Africa's most tourism-dependent locality. Among others Duarte Alonso et al. (2020) stress the importance for informing tourism recovery planning of empirical research which concerns the perspectives of those stakeholders at the 'coalface' of tourism development including of enterprise owners and managers. This research builds upon works by Duarte Alonso et al. (2020, 2021) and others such as by Dias et al. (2021a, 2021b) that seek to address the impacts, adaptive measures, changes and adjustments made by different groups of tourism enterprises in response to the COVID-19 pandemic. It provides a locality study that complements the wider national South African surveys on business reactions to COVID-19 crisis in tourism which have been produced by the Department of Tourism, Tourism Business Council of South Africa, International Finance Corporation (2020a, 2020b, 2020c).

The Bela-Bela case study

Our case study is Bela-Bela in Limpopo province where it is estimated tourism contributes almost half of local Gross Domestic Product (Rogerson & Rogerson, 2020a). In the Bela-Bela local municipality among its leading attractions is the natural hot springs. These provided the initial impetus for tourism development in the area (Warmbaths) which can be traced back to the late 19th century when the area's first 'resort' was established. Olivier and Jonker (2013) provide evidence of early tourism to Warmbaths at the beginning of the 20th century when visitors mainly engaged in partaking mud baths rather than use the properties of the mineral springs for recreation. By the 1930s publicity material produced for South African Railways & Harbours was describing Warmbaths in the following manner: " Warmbaths, sixty-four miles by rail from Pretoria, is a popular all-the-year round health and pleasure resort. The town is possessed of numerous excellent facilities for sport and recreation, but major activity is centred on the health-giving waters of the medicinal springs from which Warmbaths (Warmbad) derives its name" (Carlyle-Gall, 1937: 47).

Medicinal spa tourism visits continued into the 1940s with Warmbaths renowned for its healing properties for treating chronic arthritis and gout (Rindl, 1942). The development of tourism remained limited into the 1950s because of the presence of malaria (Ferreira & Hanekom, 1995). Major change occurred only after the malaria threat was removed. The 1980s witnessed an upturn in the town's tourism base when at the time the Warmbaths economy was dominated by primary agriculture which was in decline. Tourism offered a new pathway for local development. According to Ferreira and Hanekom (1995) a burst of tourism development in the region occurred during the 1980s with the establishment of private game reserves offering opportunities for game-viewing, safari-drives and trophy hunting. This coincided also

with the major renovation and expansion of the Overvaal Spa as part of Aventura resorts making Warmbaths one of the leading inland resorts in South Africa as a water-entertainment paradise (Heetderks, 2013). Boekstein (1998, 2014a, 2014b) points out that Warmbaths is one of the largest thermal spring resorts in the country with its healing waters offering water-based and treatment-based spa facilities. In parallel with international trends a marked shift at Warmbaths has been the decline in demand at the thermal springs for medical-oriented services and instead an increase in demand for facilities and services linked to family recreation or a healthy lifestyle (Boekstein, 2014c).

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

During the post-1994 period Bela-Bela further consolidated its position as a tourism destination. Bela-Bela has continued its established popularity as a hub for domestic tourism in South Africa. The locality benefits from geographical proximity to Gauteng, South Africa's largest and most economically prosperous region for which it serves as the recreational periphery (Figure 1). The local Integrated Development Plan provides an overview of the current tourism product mix and of planned developments (Bela-Bela Local Municipality, 2016). It states that the principal attraction of the area remains that of its natural hot springs with spring water rising to the surface at a temperature of 53C, rich in limestone and thus with wellness or healing qualities. In addition to its attraction for visitors as a spa and water entertainment, the area continues to be an attractive destination in terms of its range of game reserves, time-share offerings as well as heritage sites. The municipality contains a range of accommodation service providers from hotels/resorts, game lodges, caravan parks, bed and breakfasts, and guest houses. The largest accommodation establishment is Forever Resorts. Nevertheless, the significance of the small scale accommodation sector - especially lodges and self-catering services - in Bela-Bela and its surrounds is emphasized in research produced by Nelwamondo (2009).

The racial complexion of tourists has shifted, however, as the Aventura resort (Forever Resort) changed from an exclusively white resort to attract a growing number of Black tourists. Overall, as documented by Heetderks (2013) the area expanded its attractions for leisure visitors in search of a Bushveld escape. In addition, further growth has been occurring as a result of second homes tourism. It is argued that in Bela-Bela "tourism is prevailing and the growth of the town and most of the businesses are directly linked to the transformation of the area in a tourist destination" (Heetderks, 2013: 40). Further, it is observed that linkages with tourism afford business opportunities for catering establishments, and other hospitality venues, which have developed in and around the town and which are primarily dependent on tourist visitors. This said, in terms of the growth of scholarly tourism research which has occurred in the past decade Bela-Bela has been overlooked (see Rogerson & Visser, 2020).

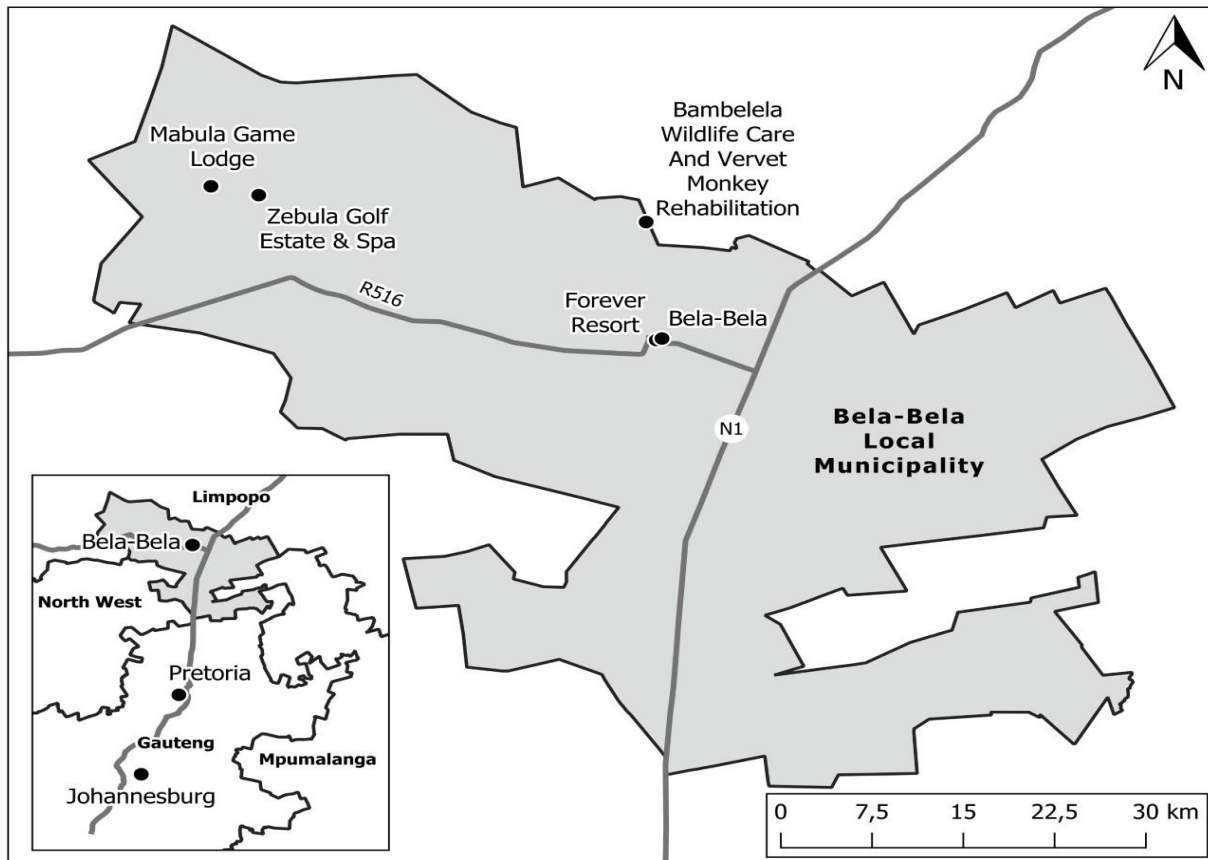


Figure 1: Bela-Bela Location Map (Source: Authors)

Methods

In investigating tourism business responses to the impacts of the COVID-19 pandemic a qualitative approach was adopted with semi-structured interviews undertaken with a cross-section of 20 key private sector tourism product owners. The interviews were undertaken during the period January-February 2021, a period during part of which South Africa was experiencing lockdowns, alcohol bans, curfews and closure of beach destinations (Tourism Business Council of South Africa, 2021). Of the total interviews 11 (55 percent) were conducted in-person with respect to essential social distancing; the remainder were telephonic interviews. For many enterprises the necessity for telephonic interviews was a result of poor condition of local roads which made access impossible for planned face-to-face interviews. The interview schedule was designed to determine issues of COVID-19 responses of enterprises and challenges, the role of government regulation and future business prospects. The data was analysed through content thematic analysis.

Table 1 presents an overview of the tourism establishments included in the Bela-Bela research. It is evident that the sample captured a representation of the mix of attractions and accommodation service providers that characterise the area. In terms of years in operation the sample includes the area’s established tourist attractions as well as a range of accommodation establishments all of which have been in operation for at least three years.

Table 1: The Bela-Bela Sample of Interviewed Enterprises

Identifier	Type of business	Years in operation	Number of employees
BB1	Wildlife tourism	10	20
BB2	Leisure resort	80	120
BB3	Wellness	3	6

BB4	Accommodation	15	2
BB5	Accommodation	3	3
BB6	Accommodation	10	25
BB7	Accommodation	4	4
BB8	Restaurant	3	8
BB9	Accommodation	5	3
BB10	Wildlife tourism	15	25
BB11	Accommodation	5	4
BB12	Activity	8	4
BB13	Accommodation	12	3
BB14	Accommodation	20	6
BB15	Accommodation	7	2
BB16	Monkey sanctuary	18	1
BB17	Wildlife attraction	27	5
BB18	Wildlife attraction	4	1
BB19	Accommodation	22	7
BB20	Accommodation	4	1

Source: Authors

Results and discussion

COVID-19 Impacts

When asked to describe in one word or phrase the impact of COVID-19 on their establishment, all of the respondents indicated that the pandemic had negatively affected their business. Some descriptors used included ‘devastating’, ‘heartbreaking’, ‘disastrous’ and ‘detrimental’. Such responses were to have been expected, given the substantial economic losses faced by the establishments concerned from the outset of lockdown. In fact, some of the respondents disclosed that they were running at a loss, with others becoming almost bankrupt. It was confirmed by the majority of tourism stakeholders that domestic tourism comprises the largest market segment in Bela-Bela with international visitors only a small share. Typically, one respondent described the situation as follows: “Most of our clientele is [i.e. are] domestic tourists. However, during the peak season, we also have [to cater for] international tourists. So, roughly, I can say [that] it’s 90% domestic and 10% international (BB6). Only a few enterprises catered for international tourists, mainly those engaged with volunteer tourism or hunting, which is another drawcard for Bela-Bela. The hunting businesses are located outside the centre of Bela-Bela at the game farms on the periphery of the municipality.

Supply-side responses to changes in demand

From the supply-side responses the pandemic presents long-term structural and operational changes for the tourism industry of Bela-Bela. The study recorded mixed responses from businesses to the demand for tourism in Bela-Bela. Some respondents noted that the demand for their offerings was low, and showed little sign of growth, owing to the economic status of most South Africans: We have noticed a big drop in demand already, as opposed to previous years – a major decrease in demand of about 60% (BB3). Due to retrenchments, and resulting from Covid-19, most of our guests have cancelled their booking, and others even requested that we refund them. Those who are willing to travel ask for price reductions (BB9). The lockdown adversely impacted the economic conditions in South Africa. In common with other parts of the world, rates of unemployment increased at an alarming rate. The responses from several respondents indicated the low demand to be viewed as a result of escalating unemployment and the poor state of the national economy. Business tourism in terms of conferences was the mostly badly impacted. The leisure market was noted as seeing some upturn during the period (level 3) when domestic tourism was permitted. The view of the respondent from the leisure resort was as follows: “While demand dropped off for the conferencing market, due to the

pandemic, the leisure market, came back much more robust than we thought it would. However, it was only limited [to the period] around [the] weekends, and very short stays” (BB2). The responses of some of the interviewees alluded to leisure tourism in Bela-Bela as having experienced some increase, although with certain changes to the consumption patterns of the tourists involved. The above statement points to the domestic tourists’ preference for weekday stays, as opposed to weekend stays. Such a preference linked to the reduced prices charged on weekdays, and from the specials that were run to boost reservations. Discussions with tourism managers and owners showed that the tourists who visited Bela-Bela expected lower rates than usual for accommodation and for participating in some activities: The biggest problem that we are facing right now is the decrease in the number of bookings, and even when we get those bookings, clients always want to negotiate a discount (BB5). Evidently, value for money has become of increasing importance to the consumers of several tourism products and establishments in Bela-Bela. This said, the consensus among the managers and owners was that they could only reduce their prices to a certain extent, as their expenses still had to be paid. Tourism establishments in Bela-Bela are, therefore, faced with the challenge of having to balance the need to meet the demands of the consumer, while remaining profitable, or at least to break even.

The upturn in leisure domestic travel to Bela-Bela is a result of the destination’s close proximity to key market areas as Johannesburg and Pretoria. A number of respondents viewed the closure of the borders as a boost for the number of domestic tourists, stating:

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

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

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

Tourism businesses introduced various responses to the new tourism environment and domestic market. Increased marketing, particularly on different social media platforms, was found to be the most widely used tactic for responding to the new COVID-19 tourism market. Many respondents explained that advertising price reductions was frequently done, especially after the move to level 3 of the lockdown, when domestic travel was permitted in South Africa: We did try to milk it out on different social media, like Instagram and Facebook. We do have pages on both social media. We also did good business [on] WhatsApp, so it’s easier for the people to connect us (BB18). The quotes support the above discussion in that the consumers showed an interest in being able to benefit from the reduced prices. In addition to gaining more awareness about the products on offer, the respondents used social media marketing to capitalise on the fact that domestic tourists are increasingly preferring to travel during the week,

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

Such a change in consumption presents new opportunities for certain establishments, which can capitalise on weekdays, for which there is relatively little demand. Arguably, the establishments concerned, particularly the accommodation service establishments potentially can capitalise on the possibilities for remote working, as Wi-Fi is readily available, which is of key importance. Other business responses included expanding on the already existing offerings, with both the accommodation and the attraction sectors having adjusted some of their experiences. On the attraction, or activity-side a respondent explained: We have introduced more offers and packages to attract local travellers, and [to] make our products stand out (BB3). Largely, the adaptations involve limiting contact with tourists and allowing their self-exploration of the attractions. Doing so is in line with curbing the spread of the virus, as well as with protecting both the staff and the visitors from infection. From the above examples, the visitors are still able to consume the primary offerings of tourism attractions. On the accommodation side certain respondents disclosed that they had restructured the nature of their businesses. One respondent stated that they had changed their establishment from a bed and breakfast to a guest house: “I have opted to convert my business from a B & B to a guest house. In order to reduce the cost of breakfast, we now offer breakfast upon request” (BB5). Certain respondents saw advantages in shifting to a self-catering guest house because of the less direct impact of the government regulations such as the alcohol ban. Other respondents had begun renting out their accommodation for longer stays, explaining: “We’re developing more caravan spaces for people to stay up to three or four months” (BB13). One respondent was considering even the option of renting out some rooms to students in the area.

The respondents highlighted their changes brought about in some of their operations, such as introducing check-in processes to reduce touchpoints. In addition to the above, other safety protocols followed by some of the respondents are extending the period between checking-out and checking-in times for the next guest. One respondent explained that the longer time involved than had been the case in the past allowed for thorough cleaning and disinfecting of the bedrooms. For those enterprises that primarily had been reliant upon a larger cohort of international as opposed to domestic visitors’ different responses were observed: “Yes, we have started offering [a] guided wildlife tour; it's a 90-minute educational tour. This only started in December, and because it was the school holidays” (BB16). Understandably, the above was a consequence of the closure of the borders. While the situation offered an opportunity to gain entry to a new market, the owner of the establishment explained that the locals had little interest in the nature of their experiences, as it was volunteer work. A transition to offering online tourism experiences was only recorded for one establishment: So we've gone online; we do our game drives online, where we also get the opportunity to educate our clientele about the African safari” (BB10). Indeed, the limited response of offering virtual experiences points to the fact the majority of Bela-Bela establishments still depend on face-to-face interactions. Potentially, however, this might increase their vulnerability in terms of the several changes and adjustments made by government to mobilities and movement restrictions.

Business challenges

The COVID-19 pandemic has presented many difficulties for Bela-Bela tourism establishments in terms of challenges of adapting to the shifting environment. Overall, the most significant business challenge for these businesses relates to finance. I have had to compromise my savings in order to save the business, and now I'm bankrupt and in debt. This has forced

me to release my staff (BB4). With the COVID-19 impacts on decline in the economy as a whole this has reverberated into Bela-Bela tourism enterprises:

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

The easing of some COVID-19 regulations presented opportunities for some tourism establishments to reopen, as long as their system of enforced mask-wearing, social distancing and sanitisers is in place. This said, the Bela-Bela respondents pointed to the increased costs for running their business: Every time we have visitors, it means more maintenance. We need to make sure that our chalets are clean and fogged every time, [so as] to ensure that everything is up to code (BB12). Tourism businesses are thus negatively impacted by COVID-19 both in terms of reduced visitor numbers and the increased costs of providing hospitality or serving the cohort of tourism arrivals. Further adding to the burdens on the managers and owners was the refusal of some tourists to adhere to basic COVID-19 regulations:

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

Further, the fear of travel was noted to be a prominent challenge identified by the respondents, with one explaining that *“because of the second wave, people are scared of travelling. We follow all the protocols and everything here, but that means nothing if people are afraid to come”* (BB14). The rising number of infections and deaths has created some fear regarding travel which has adversely impacted on tourism establishments in Bela-Bela. Although local businesses have had to focus on creating safe environments for their consumers, the fear of travel remains a major barrier in terms of maintaining the business operations of many tourism establishments. Moreover, interviews with the representative of a well-established resort in the area highlighted the changes that needed to be made in terms of online booking as having been a further challenge:

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

During 2020 online booking was strictly enforced owing to the need to manage the number of people on the different premises. Whether new opportunities have come into being for domestic tourism was debated among the respondents. On one hand, a few were of the view that domestic tourism might pick up because Bela-Bela is an affordable well-established holiday destination for domestic tourists. On the other hand, most respondents expressed the view that the economic turmoil caused by the lockdown had led tourism to become a luxury that people could no longer afford. For example: Well, as people's budgets tighten up, we are seen as a luxury item. People were happy to go away to a reserve, but to spend on luxury items

like accommodation and spas ... I see even more pressure on us (BB3). The above aligns with the arguments on the financial impact that COVID-19 has had on employment and on the national economy as a whole. The focus of many surveyed businesses was on survival, and not on expansion, a view presented by many of the establishments:

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

All interviewees revealed their establishments to be barely surviving, as they still had to pay their fixed costs, while not generating much (if any) income. On the matter of expansion, the respondents opined that expansion and future developments could only happen once there was a positive change in the fight against COVID-19. In fact, most of the respondents expressed their inability to make any expansion plans when lockdown levels 4 and 5 might be looming, owing to the possibility of a resurgence in the number of positive COVID-19 cases. Overall, the impact of the COVID-19 pandemic on tourism enterprises in Bela-Bela shows the catastrophic conditions that forced them to downscale their operations. The managers had to identify the non-essential services and those areas with a significant decline in demand. Such areas were scaled down to minimise the losses incurred, by means of reducing the amount of unnecessary or redundant equipment, thereby lowering the costs involved. Measures taken included limiting the number of guest rooms, closing the swimming pools, and reducing expensive, but underutilised, facilities, like washing machines. The interviews showed a positive association between business sustainability and the financial challenges. One respondent stated as follows:

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

Another area requiring reduction was the labour costs. Specific measures in the area included negotiating salary reductions and requesting employees to clear their outstanding leave. Many respondents indicated that, while the above had been taken as provisional reduction measures, the effect of COVID-19 presented unforeseen circumstances that forced some of their temporary staff to be laid off and those who were permanently employed to be retrenched: "We did have to cut down on our staff members. Unfortunately, these are the worst job losses as well, due to no income coming in to support so many people financially" (BB18). Moreover, the establishments that had wildlife as a major tourist attraction revealed that the pandemic had had a major effect not only on maintaining the animals but as well on their overall well-being:

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

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

Cooperation between the local companies was another theme in the interviews. Arguably, half of the participants attested that they collaborated with other tourism stakeholders, so as to enhance their tourism offerings and reduce their operational costs, thus making them sustainable tourism operators: “We try to collaborate as much as we can with our local attractions and restaurants, such as using our local Bela food delivery, combining packages with game reserves and other attractions” (BB3). Other respondents cooperated in terms of marketing and joint bookings: “Yes, we have partnered with neighbouring accommodation facilities on joint marketing and joint offers, such as Zebula and Mabula. This really helped to save the little money that we had left” (BB1). It is important to note that the partnerships mentioned did not directly result from the presence of COVID-19, but, rather, was an activity that had been practised before the pandemic. Conversely, other respondents stated that there was no cooperation with other local businesses. Some of the reasons mentioned included that businesses were reluctant to work with their ‘competitors’, that there was no help available, and that it was an added expense to have to work with other businesses that were not financially feasible at that stage. Other respondents expressed their hesitation about collaborating with other local establishments, because they were unsure whether they would receive any return on their investment: “So we always thought of it, we even thought of making compact deals to see if we can get more people. I just think everyone is scared of doing things, like cutting too much on costs and end[ing] up making nothing” (BB12). In general, the reluctance to cooperate, and the perception of receiving low (if any) return on investment, was based upon the dire financial state of the establishments in Bela-Bela. For some enterprises cooperative relationships with other the local businesses did not produce the intended outcomes.

The role of government

As a whole the respondents painted a negative picture concerning the effect that the existing and changing government regulations had on their businesses: “Taking away travel and all those regulations makes the hospitality industry unsurvivable” (BB14). The reopening of the tourism sector meant that various changes had to be implemented to curb the spread of COVID-19, most notably the essential safety protocols that they had to implement which meant limiting the numbers of people staying at their establishments. For instance, a respondent from the accommodation sector said: “We have now opted to accommodate a limited number of customers [so as] to adhere to the COVID-19 regulations” (BB11). From the side of attractions offering nature-based experiences, the regulations resulted in “downscaling on the number of people that ... [go on] ... the game drive, for purposes of social distancing and staying safe” (BB18). Other attractions and accommodation establishments restricted the number of their day visitors. In addition to placing limits on entry numbers, some respondents mentioned that they had had to rearrange their open areas (such as restaurants), so as to ensure adequate spacing between people. The manager of one caravan park mentioned: “We split up all the bathrooms for them, which means we can only accommodate a few caravans” (BB13). Considering that the establishments mentioned were closed down for months with no income and with continued costs, the additional measures, such as restrictions, became an extra financial burden on the businesses involved. Further, ensuring the safety of both the staff and tourists was an added cost for the establishments concerned.

The closure of both the national and the provincial borders was frequently mentioned in the interviews. Specifically, in terms of the provincial borders, many of the respondents

argued that the closure had severely hampered their businesses as Bela-Bela is heavily reliant on tourists coming from Gauteng. The few respondents who spoke on the national borders explained that, while the domestic market seemed to be picking up, they were not making as much money as they could have done, owing to their high-spend international visitors not being able to enter the country. Arguably, the closure of the borders poses a major challenge to businesses, of which many were found to be barely surviving. Some respondents pointed to the adverse impact that the mere announcement of the presidential address had on bookings and postponements, as, for instance: Completely, every time there's a new protocol, everyone gets afraid from the start, so they stay at home because of being too scared of what the implication of the government speeches are (BB14).

Evidently, the market reaction to the new regulations and to the presidential addresses was a frequent feature in the interviews, with one respondent stating: “This market also reacts very quickly to changes in government regulations, e.g. as soon as regulations are tightened, bookings get cancelled” (BB2). Travellers faced some anxiety, due to uncertainty concerning the present COVID-19 environment, and the implications of the presidential addresses (on COVID-19) on travelling. The postponements experienced severely hampered the already fragile financial sustainability of tourism businesses in Bela-Bela. The above was already evident in the terms used to describe the impact of COVID-19. Further, the restrictions placed on swimming in December 2020 were of particular concern to most accommodation establishments in the sector, as, for example: “The only thing is, if we have more than one group booked, they can't really use the swimming pool, which is kind of one of the main attractions, at you know, lodges and guest houses. So people have been put off by that” (BB11). The last quote spoke to the amendment of the regulation, made in January 2021. The Waterpark at the Forever Resort is a major attraction in Bela-Bela. Discussions with managers and guest houses in the city centre highlighted that their guests often selected their establishment, owing to its proximity to the resort. Accordingly, the various changes imposed by the resort, in compliance with the government regulations, seemed to affect the nearby accommodation establishments negatively.

The respondents, when asked what support would assist their establishments, put several suggestions forward, including revised financial aid, marketing and infrastructure. At the scale of the local government, assistance with the municipal costs was affirmed to be important for the sustainability of the establishments. Many respondents mentioned that they needed some reduction or relief in such regard. The marketing assistance that was required was twofold. Firstly, the respondents explained that the provision of more and clearer road boards would aid in increasing their visibility: “They could allow and support marketing opportunities in town, to promote tourism offerings in the area. Such as a large sign with a map to the area, a website with links to the facilities in the area. Have a functional Tourism Office in town that constantly informs people [of] various accommodation options in the area” (BB7). Secondly, the respondents affirmed that the local government should look into marketing smaller tourism businesses in the area, with one stating that there should be “more marketing of small local attractions to help with [handling] COVID” (BB1). Training and the marketing of small businesses might aid in their recovery and adaptation to the ‘new normal’. At the level of the national government, the respondents pointed to the bad roads in the town, stating: “Improvement of [the] infrastructure in the area would be nice; this will attract more tourists to the area” (BB8). From the researchers’ observations, the roads in the town had many potholes, and some of the roads to the attractions outside the city centre were neither paved nor tarred. Further, many respondents highlighted the fear that was faced by many tourists in travelling. Accordingly, it was found that the respondents required the government to support the local tourism industry by addressing their fears which were associated with travelling.

Overall, financial assistance was most commonly stated as being the most important support needed for survival during 2021.

Business prospects

In common with the pessimistic mood in early 2021 of the tourism private sector as a whole (Tourism Business Council of South Africa, 2021), the outlook for tourism businesses in Bela-Bela was not viewed as promising Overall the 20 Bela Bela tourism respondents were not confident of their businesses surviving the next 12 months. Only three of the interviewees stated that they had managed so far and could continue with limited or no support for another year. Two of these were accommodation providers and one was a café.

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

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

Seven of the interviewees were hopeful that they could remain open for the coming twelve months, however, it is apparent that most of these businesses already are struggling so further restrictions or limits on the ability of tourists to travel will make their businesses unsustainable. The majority of these respondents were accommodation providers: "We hope to still be in business by the end of the year" (BB6). "We shall remain hopeful and pray that we don't shut down for good" (BB9).

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

The remaining interviewees admitted that they were already struggling with debt due to revenue being down by as much as 65% in the case of one accommodation provider. In addition, the ability to pay staff or look after the animals in the case of the three animal tourism attractions was a challenge in the current economic climate due to the pandemic. Some tourism attractions admitted to already being closed and most conceded an inability to continue operating beyond the short term. "We are literally operating from one month to the next, we will first have to retrench and if this strategy does not work we may need to close down" (BB1). "I've accumulated more debt and I can't run this business any longer, I'm now forced to close down or sell" (BB4).

Conclusion

Adaptation responses by businesses to the unpredictability of the pandemic must be a critical topic for changing tourism agendas in the COVID-19 environment. Not only can such research inform potential new theoretical advances as demonstrated by Duarte et al. (2020), the findings from such investigations can be useful also from a policy perspective to "act as a vehicle for adaptation, resilience-building and future recovery" (Duarte et al.,2021: 2). The objective in this study was to gain insight from a locality study conducted in South Africa's most tourism dependent municipality of the business responses of tourism enterprises to the crisis unleashed by COVID-19. The research findings contribute to a vital knowledge gap that exists in South

African scholarship about COVID-19 adaptive measures and can be part of an empirical base to inform recovery planning interventions. Bela-Bela as a tourist destination is heavily concentrated on the domestic tourism market for which it is geographically advantaged by its proximity to Johannesburg, Pretoria and Ekurhuleni. The pandemic's impacts on the economy as a whole, government regulations on inter-provincial mobility as well as an established consumer fear of travel have taken their toll collectively on the tourism businesses in the area. The subdued nature of domestic leisure travel together with the near total collapse of business travel have contributed to the financial squeeze experienced by local businesses which have been struggling to conform to new COVID-19 safety and health protocols. Adaptive responses have included downsizing of businesses, including worker retrenchments, price-cutting, limited initiatives towards product diversification, energetic social media marketing and repurposing of properties. Local inter-enterprise cooperation has been a further response. Core challenges for Bela-Bela tourism enterprises are headed by immediate financial issues and most especially in the context that minimal support has been provided by national government to assist their business survival. Future business prospects are not viewed favourably such that business closures and a hollowing out of the tourism enterprise base accompanying job losses in tourism appear inevitable.

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