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COVID-19 AND THE FUTURE OF THE SOUTH AFRICAN TOURISM INDUSTRY: A SUPPLY-SIDE PERSPECTIVE

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Abstract: The tourism industry is struggling to recover and overcome the shortfalls due to the ongoing COVID-19 pandemic. The research identified the determinants to consider in the future from a South African supply-side perspective. An online questionnaire was employed in 2020. Exploratory factor analyses identified the dependent (the perceived future of the industry after COVID-19) and independent variables: ways to reach suppliers' target market(s) during the pandemic, the predicted adopted strategies after COVID-19 and the perceived sector risk. Linear regression analyses revealed the significant variables that provide guidelines for managing the industry's future.

Key words: COVID-19, tourism suppliers, tourism industry future, post-pandemic, intervention strategies

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INTRODUCTION

The impact of COVID-19 on the global economy, and service sectors in travel, tourism, and hospitality, has been widely reported. During strict lockdown protocols, the tourism industry saw a significant decline in the demand for service offerings and a predicted employment loss of 100.08 million jobs globally (Statista, 2020). Resilience and sustainability are the core aspects the industry has struggled with, even pre-pandemic (Ioannides and Gyimothy, 2020). COVID-19 has forced a transformational way of thinking and provided promising opportunities to work on sustainability to ensure the industry's future (Higgins-Desbiolles, 2020; Gössling et al., 2020).

In South Africa, tourism is an important sector that contributed 3,7% to the country's GDP in 2019 (pre-pandemic) (Stats SA, 2021a). Compared to other industries and sectors, tourism is more important than agriculture, utilities (electricity, gas and water), and construction (Stats SA, 2021b). Tourism activities and related spending directly contributed R209 billion to the national economy in 2019 (Stats SA, 2021a). In 2020, the tourism sector was negatively affected by the COVID-19 pandemic, which resulted in a high level of economic uncertainty (De Villiers et al., 2020; Musavengane and Leonard, 2022). From a demand perspective, the overall number of travellers (arrivals and departures) decreased by 71,0% between 2019 and 2020 (Stats SA, 2021c). From a supply perspective, business surveys conducted by Stats SA and the Department of Tourism (in partnership with the International Finance Cooperation and Tourism Business Council of South Africa) in 2020 found that 98% of responding tourism businesses indicated they were negatively affected by the pandemic, nearly 20% of the businesses were making short-term layoffs due to South African government's COVID-19 regulations, 58% were unable to service their debt, and 61% were unable to cover their fixed costs in 2020 (Department of Tourism, 2021).

While there are signs of uptake in tourism activity in 2022 (iAfrica, 2022), the South African travel and tourism industry will most likely recover slowly within the coming months or even years (Kruger and Viljoen, 2021). The pandemic represents a crisis event that will transform the South African tourism sector and the context in which it operates (Rogerson and Rogerson, 2020). 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, 2021; Rogerson and Rogerson, 2021). While various studies have assessed the impact of the pandemic on tourism demand in South Africa (Rogerson and Rogerson, 2020; Rogerson and Rogerson, 2021; Bama and Nyikana, 2021; Kruger and Viljoen, 2021; Matiza and Kruger, 2022), limited studies have focused on the supply-side. Dube (2021) conducted a document analysis on the implications of the lockdown on the South African tourism industry, while Rogerson et al. (2021) focused on tourism businesses in one province (Limpopo) through qualitative interviews.

To help fill the gap in the current literature and provide possible recovery strategies, this research aimed to identify the determinants that need to be considered in the future from a South African supply-side perspective. The dependent variable was, therefore, the perceived future of the industry in a post-pandemic world. The results shed light on the determinants that can help regenerate the travel and tourism industry to inform planning for tourism recovery in South Africa. The results are timely not only for South Africa but also for other developing counties.

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Background

The following sections specifically address the related literature.

Is regeneration of the South African tourism industry possible?

Since tourism is considered a catalyst for economic growth and diversification, the tourism industry is highly dependent on other sectors to succeed, for example, transport, banking, agriculture and food production, telecommunications, labour markets, as well as all other economic sector resources that are pooled to provide the tourism experience (Stanblib, 5.8.2019). This is indicative that since the pandemic now burdens tourism, other sectors in the economy will result from diminished demand from tourism stakeholders and experience added negative impacts, not to mention the impact of economies of scale, employment, operational costs, and logistics. In the media, reports have shown how the environmental damage caused by industrialization (particularly air quality) has improved since the shut-down of factories and other industrial producing sectors (World Economic Forum [WEF], 2020b). In some cases, during hard lockdowns imposed during the pandemic's peak, wildlife has been spotted in towns and cities, as less human movement has caused animals to venture around more freely and without fear (Euro News, 25.4.2020). If more environmentally conscious and sustainable travel behaviour is expected from visitors in the future, the chance of a shift in source markets is a foreseeable challenge that needs to be overcome (Kruger and Viljoen, 2021). For example, South Africa is a world-renowned destination. The primary source markets emanate from Europe and North America (National Department of Tourism [NDT], 2019) – questioning the future of long-haul markets and, subsequently, the increase of carbon footprints associated with long-haul travel. Therefore, a mitigating initiative would be to rely on domestic tourism to regenerate the South African tourism industry (Matiza and Kruger, 2022). However, this is easier said than done since many tourism operators in South Africa have focused almost exclusively on the needs and preferences of international inbound travellers for a long time. In addition, the pricing in the South African tourism industry is so exuberant that South Africans cannot afford to travel in their own country. This is depicted by statistics on the average length of stay for overnight travel. The domestic market stays around four nights, while foreign markets stay up to 12 nights (National Department of Tourism [NDT], 2018). Pricing is not the only variable influencing these results. However, it significantly contributes to destination choice and actual travel.

Since the potential impact on household spending will be prioritized over essential spending, leisure and tourism will be the last priority of many domestic tourists. Therefore, restructuring pricing for domestic (South African) and regional (SADC [The Southern African Development Community]) markets will be developed. This causes other problems since foreign tourists might feel that alternative pricing measures exploit them. Hence, a fine line between tourism equity, equality and accessibility will have to be enforced, with the potential of legal or statutory guidelines to ensure fairness.

Another pressing matter, especially foreign inbound tourism, is issuing business and leisure travellers visas. Here the use of more technology-based solutions like e-visas and biometrical information for travellers who have previously obtained a visa will be prioritized (Organisation for Economic Co-operation and Development [OECD], 2014). If the ease of travelling and doing business is increased, the potential to return to a "business as usual" action plan can be formulated, including mitigating efforts to ensure that tourism and travel services are more robust in response to the pandemic. Here national tourism stakeholders need to urge government departments such as tourism, home affairs, trade and international relations to ensure a visa on arrival or e-visa system for all inbound arrivals and not solely major source markets. The extension of visas is another concern, as some foreign visitors might be inclined to stay longer if they could.

Tourism is a labour-intensive sector, with nearly one in every ten employed individuals globally being directly or indirectly employed due to tourism (Fin24, 28.2.2019). Nevertheless, the WTTC (2020) estimated that nearly 100 million jobs are at risk due to COVID-19 in the G20 countries, of which South Africa is also a partner. With that said, in many countries (including South Africa), the use of formal legislative minimum wage for tourism, travel and hospitality employees is extremely low - at R20 (approximately €1) per hour in South Africa (Binder Dijker Otte [BDO], 18.12.2018). Moreover, the sector provides jobs to many unskilled and uneducated workers, making these workers very vulnerable in times of economic uncertainty (Pizam, 1982). It should also be emphasized that national requirements for unemployment benefits (such as UIF) should be strictly enforced to ensure workers' safety and well-being, that employers are not misusing employees, and that they are paid fairly. Naturally, this will have to be discussed with the relevant national departments such as labour and labour unions and the revenue services so that no or minimal tax is levied on tourism, travel, and hospitality employees as a special tax incentive. This is especially important since many in the sector rely on the generosity of patrons through tips, which are not a formal source of income, urging the development of formal job opportunities (World Economic Forum [WEF], 2015).

Closely related to employment are training, education and skills. Since many employees have no formal education, they have little to no success gaining positions in other sectors, especially in developing countries like South Africa (World Bank, 2019). This means that departments of education and training, as well as tourism, should offer free training for tourism, travel and hospitality employees to ensure that they not only provide services that are benchmarked but that they can be formally registered as a tourism service profession (be it a waiter or bartender) with the necessary "soft-skills". This will also positively influence the social standing of employees in the service sector and provide them with more opportunities to have stable careers and care for their families and dependents more effectively. Therefore, the stigma associated with service sector work should be minimized or removed to ensure that more people are willing, formally skilled, and gain the maximum benefits of being permanently employed in the service sector (Hanisch et al., 2016). This will also have to be addressed in national legislation and the labour act to ensure that employees are employed for more extended periods (geared towards permanent employment), contribute to tax and have a meaningful existence in society.

South Africa: the induced good, the organic bad, and the discriminatory ugly

Starting with the good, South Africa has embraced various branding campaigns over the last three decades, from "a world in one country", highlighting the unique and diverse natural and scenic beauty, to "alive with possibility", aimed at increasing foreign investment and confidence, and currently "inspiring new ways" which showcases the country's competitive strengths and national pride (BrandSA, 16.2.2022). In all, the brand image of South Africa tries to solidify the country as the gateway to Africa for travel and investment. The trajectory of the brand campaigns should have been favourable until COVID-19. The bad relates to the media frenzy concerning South Africa's handling of the COVID-19 pandemic, which made headlines worldwide. By October 2020, the "South African variant" was known globally. Reassuringly the WHO renamed the variants based on the Greek alphabet to avoid stigma toward nations where new variants arose (Breslow, 2021). In November 2021, South African scientists were the first to identify the Omnicron variant that emerged from Botswana for the second time. One would think that having the capability and the intensive network of scientists and clinical practitioners would be the proverbial "feather in the cap" for a developing country like South Africa. However, this was a "fall from grace" as the media backlash and subsequent banning of South Africans and other Southern African communities were enforced, leading to "travel discrimination" (BBC, 29.11.2021).

The ugly lies in what has been termed "tourism xenophobia/discrimination" and the post-pandemic societal crises (Yang and Wong, 2020). This could potentially impact tourists' perceived destination image. Destination image is crucial in destination marketing and competitiveness (Van Dyk et al., 2019). Destination image encompasses various aspects like active and purposive promotion to create the "projected" image, contrary to the "perceived" image formed in the mind of people. Perceived images can also be classified into primary (first-hand experience/previous visit) and secondary images from information generated by various other sources (organic and induced) beyond the individual's own experience (Kislali et al., 2020). "Organic" images are based on sources of information not aimed at promoting the place, such as news, novels, popular culture, and word of mouth. "Induced" images are based on information sources with a commercial interest in promoting a place, such as brochures, advertisements, travel agents, and guidebooks (Kislali et al., 2020). In the digital era, sharing organic information via social media has led to a surge of misinformation, scepticism, and increased nationalist/populism sentiments (Bergmann, 2020).

It would nearly be impossible to anticipate how organic information has shaped the perceived image of South Africa on a global scale. Moreover, the impact of the induced information mitigates the projected image of South Africa. Therefore, it is crucial to understand how tourism suppliers view the future of the industry post-COVID. To achieve this, suppliers' initiatives to connect with target markets need to be assessed, and identify strategies for future marketing and management, from a South African perspective, in conjunction with perceived risk.

MATERIALS AND METHODS

This study applied a quantitative research method using a structured online questionnaire developed in QuestionPro©. Figure 1 illustrates the steps to collect the data and the multivariate statistical analyses applied to analyze the data.

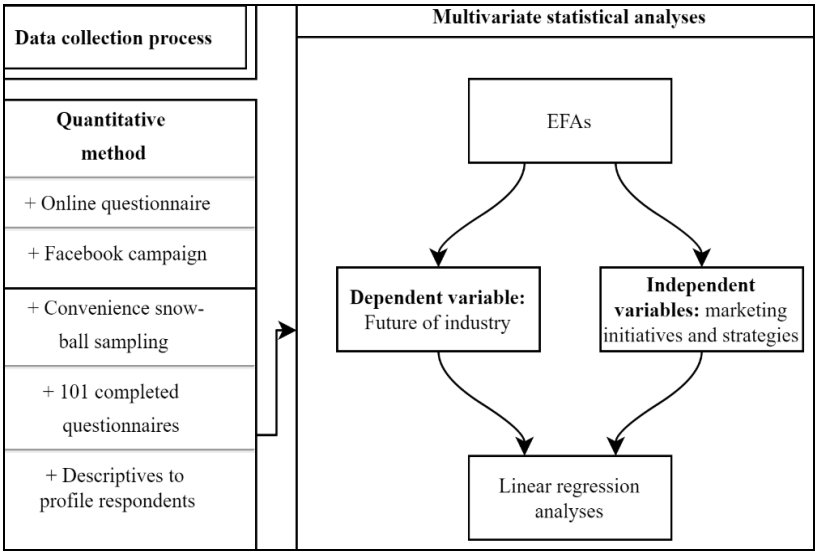

Figure 1. Steps in the data collection process and multivariate statistical analyses

Population, sampling method and survey

The questionnaire measured respondents' socio-demographic information, the tourism business suppliers' profile, their main target markets and ways to reach and engage with them during the pandemic (10 statements measured on a 5-point Likert scale of extent), the planned management and marketing strategies after the pandemic (18 statements measured on 5-point Likert scale of extent) and the perceived future of the industry (30 statements measured on a 5-point Likert scale of agreement). The researchers developed the statements included in the questionnaire based on the reports by The World Tourism Organization (UNWTO, 2020a; UNWTO, 2020b) and the World Economic Forum (WEF, 2020a; WEF, 2020b). The findings from this research also expand on the empirical findings by Kruger and Viljoen (2021).

The link to the online questionnaire was distributed to tourism business suppliers on the Facebook page #tourisminmyblood from June 2020 to August 2020. Because the survey was conducted during Level 1 lockdown in South Africa, this approach was deemed the most appropriate to reach the target population. The group administrators acted as gatekeepers and posted the link on their site. It serves as a platform for discussions between industry role-players, networking, and sharing stories and experiences during COVID-19. Since respondents were instructed to distribute the link to their network of tourism suppliers, a convenience snowball sampling method was employed. 101 fully completed responses were obtained and included in the analysis. A sample of 370 respondents would have been appropriately representative and could have validated the results (Krejcie and Morgan, 1970). The authors acknowledge

the limitation of an unrepresentative sample size. Due to the exploratory nature of the research, the results are considered worthwhile to view from a developing country perspective. Most of the respondents were female (67%), 51 years old with tertiary education (54%) from the Western Cape (28%) and Gauteng (21%), which are two of the largest and wealthiest provinces in the country. The participating tourism suppliers have been operating for 15 years and were classified as micro-enterprises (1-9 employees) (51%). The most represented sector was lodging and accommodation (59%), followed by MICE (Meetings, Incentives, Conferences and Events) (14%).

RESULTS AND DISCUSSION

The multivariate analysis involved exploratory factor analyses (EFA) in identifying the dependent (the predicted future of the industry) and independent variables (initiatives to reach the target market(s) during the pandemic and the predicted adopted strategies after COVID-19) in the regression analyses.

Results of the EFAs

The factorability of the data was determined by the Kaiser-Meyer-Olkin (KMO >.70) and Bartlett's test of sphericity ($p < 0.05$) statistics. Exploratory Factor Analyses (EFA > 0.5) and Principal Component's Analysis (EV>1) using a Varimax rotation with Kaiser normalization were performed in IBM Statistical Program for Social Sciences (SPSS) Version 27 (IBM Corp., 2022) (Table 1). Refer to Kruger and Viljoen (2021) for the statements and factor loading coefficients. The perceived future of the tourism industry was the dependent variable, and five factors were extracted. *Rebranding* ($\bar{x}$ = 3.83) and *sustainability* ($\bar{x}$ = 3.66) followed by *localization* ($\bar{x}$ = 3.64) were indicated as the measures that will influence the future of the industry the most. Respondents agreed that *stimulus* ($\bar{x}$ = 3.22) would likely influence the industry. *Recovery* was rated by respondents as neutral ($\bar{x}$ = 2.61). Table 1 shows three initiatives that connect with their target market(s) during COVID-19. Unsurprisingly, *rebates* ($\bar{x}$ = 4.00) was rated the highest, followed by *digital engagement* ($\bar{x}$ = 3.71), while *sales promotion* was less likely to occur ($\bar{x}$ = 2.55). Finally, respondents were asked about the management and marketing strategies the industry would adopt due to the pandemic, and four factors were extracted. Based on the mean values, *safety and training* ($\bar{x}$ = 3.88) followed by *rates and tariffs* ($\bar{x}$ = 3.76) would be the most adopted strategies. Strategies aimed at *loyalty and incentives* and *local and domestic* ($\bar{x}$ = 3.24 respectively) would be implemented to a moderate extent.

Table 1. EFA results of the perceived future of the industry, current marketing initiatives, and future management and marketing strategies

Factors	Items	Eigenvalues (EV)	Var. (%)	Loading Coeff. (>.50)		Avg, inter-item correlation	Cronbach (α)	Mean ($\bar{x}$)
				Min	Max			
[1] **Perceived future of the tourism industry (dependent variables)** [5-point Likert scale: 1 = completely disagree to 5 = completely agree]								
Stimulus	9	5.34	29.67	0.48	0.83	0.39	0.85	3.22
Rebranding	6	2.70	15.01	0.41	0.78	0.33	0.74	3.83
Recovery	4	1.73	9.59	0.67	0.79	0.48	0.78	2.61
Sustainability	4	1.30	7.24	0.45	0.66	0.31	0.60	3.66
Localization	4	1.13	6.29	0.47	0.85	0.41	0.76	3.64
[2] **Current marketing initiatives [**5-point Likert scale: 1 = not at all to 5 = definitely]								
Digital engagement	4	4.21	42.09	0.70	0.85	0.58	0.84	3.71
Sales promotion	3	1.29	12.91	0.54	0.86	0.45	0.70	2.55
Rebates	3	1.05	10.49	0.54	0.81	0.32	0.61	4.00
[3] **Future management and marketing strategies** [5-point Likert scale: 1 = not at all to 5 = definitely]								
Safety and training	6	6.45	22.24	0.58	0.89	0.58	0.88	3.88
Loyalty and incentives	6	2.63	9.09	0.47	0.80	0.39	0.79	3.24
Local and domestic	3	2.28	7.87	0.52	0.75	0.34	0.61	3.24
Rates and tariffs	3	2.12	7.31	0.59	0.83	0.36	0.61	3.76

[1]Perceived future of the industry: KMO: 0.71; Bartlett's test of sphericity: [x^2 (406) = 1396.02, $p < 0.05$]
[2]Current marketing initiatives: KMO: 0.82; Bartlett's test of sphericity: [x^2 (45) = 394.13, $p < 0.05$]
[3]Future management and marketing initiatives: KMO: 0.76; Bartlett's test of sphericity: [x^2 (153) = 920.15, $p < 0.05$]

Results of the linear regression analyses

Spearman's rho first investigated the relationship between the factors (Table 1) and the dependent variables (perceived future of the industry). Standard least-squares regression analysis was performed, and the stepwise regression models had the best results. Table 2 shows the stepwise linear regression analysis results and reveals which independent variables had a statistically significant relationship with the dependent variables. The perceived infection risk of the sectors was also included in the regression analysis and was coded 1 and 0: No to moderate risk (Level 1 = no to minimal risk; Level 2 = minimal to moderate risk) = 1 and Moderate to extreme risk (Level 3 = moderate to high risk; Level 4 = high risk; Level 5 = extremely high risk) = 0. To regenerate *stimulus* (related to macro-economic and fiscal measures by governments to help the travel industry), *rebranding* (related to micro-economic restructuring measures, reimagining and revisiting marketing messages, tourism-reliant destinations diversifying beyond tourism operations) and *loyalty and incentives* (for example, incentivized loyalty programmes, greater flexibility of packages, rebranding campaigns to gain travellers trust, and more innovative and technology-based measures to connect with travellers), will have to be adopted by the tourism suppliers. Regarding *rebranding*, *stimulus* has a mutually positive relationship along with *sustainability* (related to more pro-

environmental travel measures), while *rates and tariffs* (related to ease, fees and revisiting cancellation policies) must be adopted or revised. The focus should be on *rebranding* to help manage *recovery* (related to business and employment recovery within 6-12 months of containing COVID-19). *Safety and training* (greater health and safety measures aimed at guests and staff and training, health screenings, and emphasizing health and safety procedures in marketing and policies) had a negative relationship implying that these measures will not help the industry recover over the long term. Regenerating industry *sustainabilit*y (related to more pro-environmental travel measures) yielded the most determinants. *Rebranding*, *digital engagement* (for example, a strong social media presence), *sales promotion* (deals, vouchers, competitions and online experiences), *loyalty and incentives* and *rates and tariffs* will have to be adopted or revised.

However, *recovery* and *safety and training* had negative relationships, implying that these measures may not help manage *sustainability*. Finally, regarding *localization* (related to domestic and intra-regional measures), *loyalty and incentives* and *local and domestic* (related to repositioning and redefining main source markets, greater marketing campaigns aimed at domestic markets and an emphasis on youth travel) marketing and management strategies will have to be adopted. However, the perceived sectoral risk showed a negative relationship, meaning that suppliers recognize that different sectors are likely to be impacted differently depending on the level of risk.

Table 2. Regression model predictors and stepwise linear regression results for the results of the future of the industry

Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
2 (Stimulus)	(Constant)	-0,027	0,509		-0,053	0,958
	Loyalty and incentives	0,618	0,120	0,447	5,166	0,000*
	Rebranding	0,324	0,115	0,244	2,822	0,006*
3 (Rebranding)	(Constant)	1,844	0,313		5,899	0,000*
	Sustainability	0,234	0,079	0,277	2,945	0,004*
	Rates and tariffs	0,185	0,052	0,307	3,586	0,001*
	Stimulus	0,163	0,070	0,217	2,318	0,023*
2 (Recovery)	(Constant)	0,043	0,463		0,092	0,927
	Rebranding	1,138	0,124	0,673	9,166	0,000*
	Safety and training	-0,289	0,073	-0,289	-3,943	0,000*
7 (Sustainability)	(Constant)	0,195	0,422		0,461	0,646
	Loyalty and incentives	0,727	0,122	0,589	5,935	0,000*
	Sales and promotions	0,137	0,051	0,219	2,671	0,009*
	Rebranding	0,257	0,092	0,217	2,808	0,006*
	Digital engagement	0,097	0,057	0,138	1,721	0,089*
	Rates and tariffs	0,146	0,055	0,200	2,679	0,009*
	Safety and training	-0,161	0,058	-0,220	-2,757	0,007*
	Recovery	-0,162	0,073	-0,222	-2,228	0,028*
3 (Localization)	(Constant)	1,915	0,474		4,041	0,000
	Local and domestic	0,315	0,074	0,379	4,279	0,000*
	Perceived sectoral risk	-0,330	0,132	-0,221	-2,499	0,014*
	Loyalty and incentives	0,286	0,127	0,200	2,253	0,027*

[1] Model 1, the R^2 value was 0.315, and the adjusted R^2 value was 0.301 [F (2, 98) = 22.551, p = 0.001]
[2] Model 2, the R^2 value was 0.303, and the adjusted R^2 value was 0.281 [F (3, 97) = 14.055, p = 0.001]
[3] Model 3, the R^2 value was 0.482, and the adjusted R^2 value was 0.472 [F (2, 98) = 45.649, p = 0.001]
[4] Model 4, the R^2 value was 0.540, and the adjusted R^2 value was 0.505 [F (4, 96) = 21.120, p = 0.001]
[5] Model 5, the R^2 value was 0.244, and the adjusted R^2 value was 0.221 [F (3, 97) = 10.432, p = 0.001]

FINDINGS AND CONCLUSION

The linear regression analyses revealed a distinct set of determinants to help manage the five identified future South African travel and tourism industry factors. Reoccurring determinants with positive relationships include *rebranding*, *loyalty and incentives* and *rates and tariffs* which are important to reignite the industry.

Rebranding the South African travel and tourism industry will be critical for *recovery*, as evident by the results outlined in the literature review due to negative media exposure and "travel discrimination" imposed on the country (BBC, 29.11.2021; Breslow, 2021). Tourists will be equally important to assess the post-pandemic perceived destination image of the country. In this regard, Matiza and Kruger (2021a) concluded that inbound tourists to South Africa could be classified into Psychocentric-, Near psychocentric- Allocentric-, and Near allocentric- tourist market segments based on the extent to which South Africa's country image, place brand dimensions and destination attributes (pull travel motives) informs their perceptions. The authors recommended that in the case of South Africa, post-crisis marketing spending could be optimized by targeting psychocentric and near psychocentric tourist segments with relevant information, including innovative attribute-based products, targeted marketing promotions, and post-crisis communication.

Coupled with *rebranding*, the results showed that *loyalty and incentives* and *rates and tariffs* would be practical ways to help the industry recover by reinforcing *stimulus*, *sustainability*, and *localization*. For *sustainability*, which yielded the most determinants, the result is supported by the assumption that travellers will be more cautious of adverse environmental impacts related to travel (Carbon Brief, 7.5.2018; WEF, 2020a). This travel behaviour could particularly benefit nature-based tourism providers such as national parks, lodges, nature reserves and wildlife parks which South Africa is known for.

The potential for community-based tourism development also presents itself where lesser-known, more rural, and wilderness areas of the country could benefit from tourism post-pandemic. Therefore, special packages through *sales and promotions* and *digital engagement* aimed at nature-based travellers could give South Africa a competitive advantage post-pandemic.

Regarding *localization*, the results show that South African tourism suppliers must adopt an intensive and revised marketing strategy emphasizing incentives and promotions aimed at the domestic travel market. However, Adinolfi et al. (2021) point out two main barriers to increasing domestic leisure travel. The first is the disparity between leisure travel offerings and leisure travel culture among the country's vast majority (i.e., Black) population. The second is the impact of the pandemic on the economy and the decrease in earnings among a significant portion of the population. Therefore, suppliers must rethink current marketing messages and pricing strategies to stimulate domestic tourism.

In a study aimed at the South African domestic travel market in the context of COVID-19 by Matiza and Kruger (2022), three domestic recreational tourist segments were identified: *Independent Budget-conscious Gen Z*; *Linger-lusting Gen Y*; and *Wealthy Wander-lusting Baby Boomer tourists*. Their findings showed that a one-size-fits-all policy and strategy approach would not be viable for domestic tourism recovery-oriented marketing and promotion in South Africa. Rogerson and Baum (2020) further suggested that the positive benefits of leveraging VFR (visiting friends and relatives) travel in post-disaster recovery situations must be harnessed by tourism suppliers.

However, travel and tourism suppliers must also rethink and carefully revise their marketing strategies and messages for the international market. In this regard, Matiza and Kruger (2021b) segmented post-COVID-19 pandemic tourists based on three psychographic factors of perceived risk (physical health-related-, social- and psychological risk) and identified three segments, 'Dogmatic tourists' (optimistic about travelling in the future), 'Sceptical tourists' (cautiously optimistic) and 'Apprehensive tourists' (highly cautious). Their findings implied that tourism destinations must be aware of the changing needs of the travelling marketing due to the pandemic; therefore, destinations must adapt accordingly.

However, the sectors' perceived risk level was negatively related to *localization*. The result can be explained by the fact that some travellers will still travel cautiously despite the industry recovery, which is supported by the traveller segments identified by Matiza and Kruger (2021b) and Neuburger and Egger (2021). The result further supports the notion of Kruger and Viljoen (2021) that from a supply-side perspective, some sectors will recover faster than others, for example, food and beverage, compared to MICE due to government restrictions. Therefore, the different tourism sectors must reconsider their offers to function and remain resilient during and after the pandemic.

Safety and training revealed negative relationships with *recovery* and *sustainability*, confirming Matiza and Kruger's (2021:170) observation that "stringent overt safety measures like health certificate requirements, the proliferation of sanitation stations and mandatory quarantining as part of the travel and tourism experience of the future may negatively influence tourist decision-making", and in the case of the research, also prevent the industry from recovering sooner. This could be due to the costs involved in implementing and continuously monitoring and evaluating the necessary safety and training protocols over the long term. While adequate health and safety protocols and measures are essential for the recovery of the industry and regaining market confidence, from the results, the suppliers appear to be wary of the long-term feasibility of these measures. With travel resuming worldwide and easing restrictions, COVID fatigue is evident with travellers eager to travel. However, the safe and long-term recovery of the industry will depend on mutual and cautious compliance from suppliers and travellers. *Safety and training* should now be considered a given and necessary part of travel. For suppliers, the efforts implemented during the pandemic should remain part of their daily operations in preparation for future pandemics. This will require investment in, for example, technology to enable contactless travel to reduce risk and ensure customer confidence (Dube, 2021).

Limitations and future research recommendations

Dube (2021) noted that the chances of South Africa being a destination of choice for travellers post-pandemic are higher than the rest of Africa, given its geo-political advantages as a gateway destination to the region. This research identified South African tourism suppliers' perspectives on managing the future of the industry post-COVID-19. The results revealed interesting findings and a distinct set of determinants that can help regenerate the industry on different levels ranging from *stimulus*, *rebranding*, *recovery*, *sustainability* and *localization*. Key to the industry's resilience will be revising *rebranding, loyalty and incentives,* and *rates and tariffs*, while *safety and training* will slow recovery. However, the measures implemented during COVID-19 should remain to ensure a long-term competitive advantage as a travel destination. The government has a crucial role to play and could consciously make travel more attractive and affordable by waiving numerous levies and taxes that could drive down the prices of airline tickets and other tourism products (Dube, 2021; Bama and Nyikana, 2021). The authors acknowledge the following limitations and propose some future research interests. The sample size is not representative of South African tourism suppliers due to the online survey method that had to be employed during the hard lockdown. Nevertheless, the results provide interesting insights into the suppliers' perspectives, which have been, to date, neglected. A qualitative approach may deem more successful in future when targeting tourism suppliers. The situation due to the pandemic in developing countries such as South Africa is very different from developed countries, and comparative studies are therefore recommended.

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