



SHORT TERM TOURISM RECOVERY PLAN

**TO SAVE THE TRAVEL, HOSPITALITY
AND TOURISM SECTOR AND MINIMISE
MORE JOB LOSSES**

June 2020

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Abbreviations

CC	-	Closed Corporation
CTT	-	Cape Town Tourism
NDT	-	National Department of Tourism
OECD	-	Organisation for Economic Co-operation and Development
PPE	-	Personal Protection Equipment
SA	-	South Africa
SANParks	-	South African National Parks
SAT	-	South African Tourism
SMMEs	-	Small, Medium and Micro-sized Enterprises
TBCSA	-	Tourism Business Council of South Africa
UNWTO	-	United Nations World Tourism Organisation

Summary

The Covid-19 pandemic and the lockdown has affected the tourism, hospitality and travel sectors and related sub-sectors particularly hard considering that it is a labour-intensive sector affecting direct tourism-related jobs but also indirect jobs as well.

To date government's tourism recovery plan suggests that the tourism sector will reignite only in December 2020, by which time there will be very little left of the sector.

A short-term and immediate plan is therefore needed to recover this sector, focusing on specific sub-sectors that could be opened up immediately while still following hygiene protocols and practicing social distancing.

We have consulted with over 30 organisations and individuals within the sector. In cooperation and in conjunction with umbrella bodies and representative bodies within the tourism sector, a number of surveys were conducted that informed our plan, namely;

- **Events and conferencing sector study** with the participation of over 30 companies in this sub-sector of the tourism and hospitality sector,
- **Franschhoek accommodation establishments Covid-19 impact survey** which took place from 8 to 11 May 2020 and with the participation of 403 establishments.
- **Western Cape accommodation establishments Covid-19 impact survey** which took place in mid-May 2020 with the participation of 27 684 accommodation establishments throughout the Western Cape
- **Route 24 survey** which includes 25 lodges stretching over 120km from Gauteng (Magaliesburg) and the North West (towards Rustenburg) Provinces.

In addition, a large number of submissions were received from tourism professionals which are also included in our plan. Local and international experiences and recommendations from experts from various local and international bodies were also included.

The 14 recommendations are divided into 3 parts, namely;

- A. Managing the crisis and mitigate the impact*
- B. Providing stimulus and accelerating recovery*
- C. Preparing for the future.*

The recommendations are compiled with the following points in mind;

1. These recommendations are possible only if there is coordination and cooperation from all departments concerned.

2. Tourism has a capacity to bounce back.
3. As an inter-personal sector, tourism is a key direct and indirect employer of Small, Medium and Micro-sized Enterprises (SMMEs) and vulnerable groups, such as people in rural areas, as this sector is interlinked with others. This makes the crisis even more critical.

This document aims to provide constructive solutions that will assist in navigating a recovery plan in the short-term so that as many as business are saved and more jobs do not get lost from what has already been lost within the sector.

Tourism

1. Introduction

The results of a survey conducted for the Tourism Business Council of South Africa (TBCSA) in collaboration with the National Department of Tourism (NDT) and the International Finance Corporation released in April shows that the tourism sector has been severely negatively affected by Covid-19 and the measures taken to reduce the spread of it. Of the respondents that participated in this survey, 99% of them have been affected by the pandemic.¹

The survey found that due to the lockdown the supply and demand sides of tourism have been obliterated. This means that there have already been substantial job losses in the sector, with the TBCSA indicating more than 160 000 job losses. While in February 79% of tourism-related businesses felt neutral or positive about their business and tourism in South Africa (SA), the April figure had shifted to 78% that now felt negative about the future. There is no doubt that this impact will be felt in the foreseeable future.

This survey confirms that all people within this sector are suffering extreme hardships and will continue to do so for at least the immediate future as the tourism sector is presently completely inactive.²

The world faces an unprecedented health pandemic globally with an unparalleled impact on all communities and the country in general. Travel and Tourism is among the sectors most affected by this crisis, and urgent support and softening the lockdown in particular sub-sectors is required given the millions of jobs (if one includes indirect jobs connected to those employed within the travel and tourism sector) that are at risk. Travel and Tourism is also uniquely placed to be part of national recovery efforts which impacts areas beyond tourism.

Travel and tourism, a labour-intensive sector, is one of the most affected with jobs at risk through the whole of the value chain. This will particularly affect the most vulnerable groups of the population, particularly the poorest of society.

While tourism is vulnerable, it also puts the sector in a unique position to contribute to wider recovery plans and actions. Around the world and locally, tourism also provides

¹ TBCSA. (April 2020). *Tourism Industry Survey of South Africa: COVID-19 – Impact, Mitigation and the Future. April 2020 Survey 1*. Retrieved from: <https://www.satsa.com/wp-content/uploads/South-Africa-Tourism-Survey-1-on-C-19-April-2020-Results.pdf>

² #Covid19 and the current state of tourism in SA. (11 May 2020). *Bizcommunity.com*. Retrieved from: <https://www.bizcommunity.com/Article/196/373/203716.html>

development opportunities, promotes solidarity, social cohesion and understanding across peoples and borders of all descriptions. Furthermore, the sector plays a key role in leveraging efforts to preserve and promote natural and cultural heritage and can even be a leading player in promoting the protection of the environment. All of this makes it even more imperative that the tourism sector is supported in every way.³

Tourism needs to start off by focusing on domestic tourism⁴ while our international ports of entry remained closed initially.

2. Government's Tourism Relief Fund

To date, government's response to addressing this pandemic has been most disappointing.⁵ Tourism Minister Nkhensani Kubayi-Ngubane cannot continue to keep her head in the sand by retaining the racial and other criteria for the Tourism Relief Fund that cuts off many businesses that are under extreme pressure.⁶

The majority of guesthouses, lodges and bed and breakfasts throughout the country are small business which generate a turnover below R10 million and yet these businesses have been excluded from the Tourism Relief Fund.

2.1 Unreasonable criteria

Presently, the Fund has additional criteria which cuts out even more people from applying for it; for example, sole proprietors and partnerships are rejected from applying for the Fund, as are non-company or closed corporation (CC) owned entities. This is another injustice to hospitality owners, of all races, as many of hospitality SMME's are privately owned and not registered as companies or CC's. Even though these businesses are privately owned there is no reason to exclude them. By excluding them the NDT has reduced its applicable criteria even further than the already onerous criteria that are in place.

Despite the outcome of a court case, the realities show that *all* South Africans are suffering. Here is an example of what is taking place as described in correspondence we received in early May 2020;

³ Rivett-Carnac, K. (13 April 2020). Tourism may be one of the worst hit sectors and bouncing back is not going to be easy. *Business Maverick*. Retrieved from: <https://www.dailymaverick.co.za/article/2020-04-13-tourism-may-be-one-of-the-worst-hit-sectors-and-bouncing-back-is-not-going-to-be-easy/>

⁴ Kravchenko, A. (15 April 2020). The future of tourism post-Covid-19. *United National Economic and Social Commission for Asia and the Pacific*. Retrieved from: <https://www.unescap.org/blog/future-tourism-post-covid-19>

⁵ Kubayi-Ngubane, M. (28 April 2020). Post Covid-19 recovery plan as travel, tourism have changed forever. *IOL*. Retrieved from: <https://www.iol.co.za/business-report/opinion/opinion-post-covid-19-recovery-plan-as-travel-tourism-have-changed-forever-47285519>

⁶ Khumalo, J. (30 April 2020). High court in favour of tourism department using race as a criteria when providing Covid-19 relief. *City Press*. Retrieved from: <https://city-press.news24.com/News/high-court-in-favour-of-tourism-department-using-race-as-a-criterion-when-providing-covid-19-relief-20200430>

We are a small self-catering venue with 5 cottages we employ 5 people. We are in North West with the second lowest number of [Covid-19] cases. We do not understand why we cannot operate as:

- *all our cottages are more than 100m apart,*
- *they are equipped for self-catering therefore no congregating in restaurants,*
- *guests can check themselves in at their own cottage - no reception with lots of people,*
- *we are on a farm of 200 hectares therefore not in a metropolitan built up area,*
- *we don't qualify for SA Tourism relief funding as we the owners are white.*

We are about to retrench our staff within the next week. This means that 50 people will be impacted.

The decision to remain judged as a sector is implausible and destructive. There is no medical sense or reasoning behind this decision.

Another small business owner within the tourism sector, explained her experience as follows:

I tried to apply for the relief but needed to obtain certain information from my financial representative which I did not have. When I tried to re-access the application form I was notified that the application had been over-subscribed and my application was not registered.

To repeat your words - we qualify for very few of the criteria mentioned namely:

- *We do not qualify for the certain criteria as we are not young or disabled and we do not earn more than R50 million,*
- *30% as we are white owned,*
- *25% as we are husband and wife business (women owned)*

When I tried to re-submit the application I was not able to...

Government should consider all applicants to apply to the fund so that tourism and its various sub-sectors can at survive at least in the short term giving it a better chance to be sustainable in the medium and long terms thereby reducing the immediate threat of job losses.

[2.2 Applications are rejected even when companies qualify](#)

Even where businesses have applied for assistance and followed the onerous application process, the NDT will in some instances still reject applications. An example of this is reflected in information we received from an applicant which shows that all required information and documentation was submitted as part of the application process excepting for the cryptically described “relevant industry certification”. No explanation was provided by the department as to what this certification is, despite requests to the department enquiring about this by the applicant. As the application included their Tourism Grading Council of South Africa (TGCSA) certificate, it was not that certificate that was omitted in this application. The application was submitted on time. The business concerned also adhered to all requirements such as tax clearance etc.

The applicant explained that the application process was not only time-consuming, but also proved to be costly due to the fact that accountants had to be consulted to complete all required financial information. Considering the hard-pressed financial time, additional funds are required to conclude this application yet it is rejected because of a missing document which the NDT did not explain what it is in the first instance. The applicants explained that “... *this process did more damage than good for us.*”

Another applicant explained her experience about applying for the Tourism Relief Fund as follows:

After waiting almost 2 months and uploading and emailing etc. etc. by the book with my entire business history of 12 years, I received an email from the Tourism Fund to say, my documents were not received in time. Further to this the Government Guaranteed Loan Scheme is now being administrated by the bank and I am required to sign personal surety for this loan. With the application I have to submit a full list of all my personal assets, including jewellery, furniture etc. etc.

Coming across a call out from Afri-Forum I joined the class action suit on the BBBEE clause. I am fully compliant as I am level 4 and exempt. As per the requirements stated by the application process. They have however not declined me on BEE level but lack of submission of documents although done within time and all the required documents submitted.

South Africa, The SMME and Travel Industry within our beautiful land is going to go up in flames and we are just sitting back and watching the kindling start to smoke with a small flame that is going to be worse than anyone could ever imagine.

It saddens me so very much.

This illustrates the situation that many applicants are in even when they are fully compliant with the NDT's own criteria. Rejection appears to not only be unfair and unconstitutional, it appears to also be arbitrary and unfair. Many applicants that meet all criteria and have been rejected are asking for clarity on why they were rejected. The DA will be asking the department for details about such cases.

3. Government's Tourism Recovery Plan

In addition, the tourism recovery plan that the Minister presented to the Portfolio Committee does not take into account the realities that the survey confirms and does not consider a phased approach to opening up the sector. Instead the plan foresees the tourism sector restart only in 12 months' time. This will only exacerbate the horrifying position that the sector is in already.

Our research finds that NDT Tourism recovery plan is not using a "*risk adjusted approach*" as claimed. This plan proves to be most disappointing as it is one-dimensional without taking realities into account. The only immediate proposal is the race-based Tourism Relief Fund which ensures that even most black applicants to the fund will find it very difficult to meet its criteria.

Some of the problems with this plan are that it has been drawn up in isolation without taking into account, and speaking to, the various lockdown levels. Due to this, it arbitrarily foresees the revival of tourism in only 12 months time, while also arbitrarily labelling the next 6 months as a "*readiness*" period, thus ignoring the realities on the ground where businesses are closing right now, and as a result jobs have already been lost, and continue to be lost. The tourism sector simply cannot wait to fit in with an illogical and ill-conceived government plan.

In its "*re-emergence*" phase in which the plan again arbitrarily decides will occur in 6 to 12 months time, the recovery of the market will "*begin*" to be executed. This presumes that government will wholly manage and control the tourism sector while ignoring the private sector as if it is a by-stander looking in.

The presentation claimed that the recovery plan will be informed by a "*risk adjusted approach*", however officials could not define the "*scenarios*" that were presented as well as scenario definitions such as "*gradual recovery*" and "*unstable recovery*". NDT officials were unable to define the levels of recovery and how they arrived at these levels in their plan.

With all these gigantic gaps, it is clear that, as things stand, no proper scientific and statistical driven data has been defined and thus will not be collected and collated to inform a proper tourism recovery plan. This therefore explains the one-dimensional recovery plan which does not understand, nor take into account the reality of the

tourism value chain. This vast and varied value chain includes travel agents, tour operators and guides, local and international tourism transport services and air carriers, accommodation of all descriptions, food and beverage services and suppliers and sellers of souvenirs and arts and crafts,⁷ the list is endless.

A representative of an establishment in the sector commented as follows on 22 May 2020. His comments reflects the sentiments of all individuals and establishments we surveyed:

... it doesn't seem to get any better: When reading/completing yesterday's "Tourism Survival Survey" from SA Tourism, it felt like reading your own death sentence: With a planned opening for International Travel not before March 2021 (!!!), most of us will not be able to survive. Not only will cash reserves be exhausted by then, but we're also losing most of next summer (so we cannot build up savings for the following winter).

Despite the realities on the ground and even with the data revealed in their own survey, namely the one mentioned on page 5, the government and the department chose to ignore the facts.

The surveys we undertook as described in this plan echoes all previous surveys and reinforces what has already been shown to be the picture in the tourism and the various sub-sectors.

4. Main stumbling blocks for tourism in South Africa

4.1 Lack of coordination, cooperation and collaboration

The lack of communication, coordination and collaboration between government, its various departments and other spheres of government is the greatest stumbling block to achieving the full potential of tourism. Because of the way that government is structured, the success of the NDT and South African Tourism (SAT) is dependent on other departments and even spheres of government.

To illustrate this, two of SA's greatest tourist attractions are Table Mountain and the Kruger National Park, both of which fall under the South African National Parks (SANParks) which is an entity under the Department of Environment, Forestry and Fisheries. Another amongst the many is Robben Island which falls under the Department of Arts and Culture. Various important tourist attractions such as Pilgrim's

⁷ de Freitas, M. (5 May 2020). Tourism Recovery Plan one dimensional and devoid of any research and fact. www.da.org.za. Retrieved from: <https://www.da.org.za/2020/05/tourism-recovery-plan-one-dimensional-and-devoid-of-any-research-and-fact>

Rest in Mpumalanga, a provincial heritage site, is under the ambit of the Mpumalanga Provincial government.

If one takes Table Mountain as an example, SANParks manages and markets this site independently without cooperation, coordination and communication with the NDT or SAT. Pilgrim's Rest had become completely dilapidated to such a point that tourists no longer visited this previously thriving tourist attraction and despite it previously being one of that province's biggest tourist attractions. The NDT can do nothing about this situation as it has no influence and is left up to the provincial government to turn the site around. In the case of the Pilgrim's Rest example, interestingly, and unusually for an ANC government, the Mpumalanga government has started to successfully turn this tourist site around with a Public Private Partnership.⁸

4.2 Lack of government capacity

The other big risk to tourism is the collapse of government capacity more directly. Even where there is communication and coordination, government must actually be able to implement what is required, for example; the SAPS must effectively combat crime.

An illustration of this is the example of Port Shepstone, south of Durban, where one sees the collapse of government capacity, personified with the collapse of the SAPS, water delivery, Eskom and the municipality. This disrupts the largest job creator in the area, namely tourism,⁹ to the point that reputational damage makes recovery of the tourism sector in the area more difficult and as a result leads to an increase in poverty, unemployment, inequality and associated social ills, such as crime. Other failures such as the inability of government to deliver electricity, sees a drop in the efforts and abilities of tourism operators to provide uninterrupted services, again leading to the drop in tourists visiting the area.

5. The Impact of Covid-19 on the tourism sector

Going forward into the short- and medium- term, it does not look good for the tourism sector worldwide, *Newsroom* reported on 27 March 2020 that the Covid-19 related travel restrictions will cause international arrivals to be down "by 20% to 30% in 2020 when compared with 2019 figures".¹⁰ The United Nations World Tourism Organisation (UNWTO) warned that these figures must be interpreted "with caution" because of the unpredictable nature and unusual crises that we are all confronting. This expected

⁸ Yenda, S.S., (22 April 2020), Pilgrim's Rest gets set for a new gold boom, City Press. Retrieved from <https://city-press.news24.com/Business/pilgrims-rest-gets-set-for-a-new-gold-boom-20200327>

⁹ Ugu District Council, (2012), Final Report: Ugu District Growth and Development Strategy, page 48

¹⁰ Newsroom, (27 March 2020). International Tourism arrivals could fall by 20% and 30% in 2020. *Newsroom*. Retrieved from: <https://moderndiplomacy.eu/2020/03/27/international-tourism-arrivals-could-fall-by-20-30-in-2020/>

decline is expected to cost between US\$300 to US\$450 billion internationally. When one takes past global trends into account, this would mean between 5 and 7 years of growth that will be lost due to the Covid-19 pandemic.

6. A properly researched Tourism Recovery Plan

The Democratic Alliance is therefore presenting this Tourism Recovery Plan which takes realities into account and is supported by research and data. A short-term recovery plan is needed that looks at doing something immediately before the medium and long term plans are considered as they will depend on what shape the tourism sector is in the short-term.

6.1 Consultation

In drawing up this plan we have consulted with over 30 organisations and individuals within the sector. In cooperation and in conjunction with umbrella bodies and representative bodies within the tourism sector (all who wished to remain anonymous out of fear of victimization from government), a number of surveys were conducted, namely;

- **Events and conferencing sector study** with the participation of over 30 companies in this sub-sector of the tourism and hospitality sector,
- **Franschhoek accommodation establishments Covid-19 impact survey** which took place from 8 to 11 May 2020 and with the participation of 403 establishments.
- **Western Cape accommodation establishments Covid-19 impact survey** which took place in mid-May 2020 with the participation of 27 684 accommodation establishments throughout the Western Cape
- **Route 24 survey** which includes 25 lodges stretching over 120km from Gauteng (Magaliesburg) and the North West (towards Rustenburg) Provinces.

A large number of submissions were received from tourism professionals which are also included in our plan.

6.2 International research

We've researched what other countries are doing to get tourism out of this crisis for a post-Covid-19 world. Data on this subject was also obtained from organisations such as the UNWTO, the TBCSA, the World Travel and Tourism Council and the Organisation for Economic Co-operation and Development (OECD) Centre for Entrepreneurship.¹¹ The OECD Centre for Entrepreneurship recent study on the

¹¹ *Covid-19: SME Policy Responses*. (16 March 2020). OECD Centre for Entrepreneurship, SMEs, Regions and Cities.

Covid-19 pandemic found that SMMEs are the hardest hit during this time. The tourism, hospitality and travel sector have a disproportionate amount of SMMEs.

Several countries have introduced direct financial support to SMMEs, such as new credits granted by public investment banks (France), zero-interest loans with no collateral (Japan), reducing the time required for banks to provide credit approval (Israel), tourism sectoral support, (Australia, Chile and Italy), new public guarantees (Austria, Japan, Korea and Israel), account receivable insurance (Korea) and the mobilisation of credit mediation for SMMEs wishing to renegotiate credit terms (France).

6.3 Solutions for and by our local environment

As Covid-19 impacts different countries in unique ways and in varying degrees these inputs cannot be definitive as we need to identify solutions within our own specific South African environment. Our plan is also informed by studying local successes and best practices particularly experienced in DA-governed municipalities and in the Western Cape.

The Western Cape has been a shining light within the tourist sector with increasing revenues all round even within a depressed economic environment.¹² The Western Cape is also the only province to launch tourism initiative during the Covid-19 pandemic.¹³

We also researched the City of Cape Town which has historically done exceptionally well locally and internationally. As a result, Cape Town has been recognised internationally with numerous awards¹⁴ including winning the best city in the world for the seventh consecutive year in 2019¹⁵.

It will not be surprising if the City of Cape Town continues to win awards in the future as it is the only city that, through its official Destination Marketing Organisation, Cape Town Tourism (CTT), have formulated plans, embracing technology and using research as a strategic guide, to plot a sustainable future for the City's vital and vibrant tourism sector. The CTT understands the importance and the link that the meetings, incentives, conferences and events (MICE) industry has with the food and beverage,

¹² *Positive festive season for Western Cape amid power and water challenges.* (15 January 2020). IOL. Retrieved from: <https://www.iol.co.za/travel/travel-news/positive-festive-season-for-western-cape-amid-power-and-water-challenges-40621686>

¹³ *Western Cape launches exciting campaign to get people to travel 'One Day'.* (29 April 2020). IOL. Retrieved from: <https://www.iol.co.za/travel/south-africa/western-cape/western-cape-launches-exciting-campaign-to-get-people-to-travel-one-day-47333320>

¹⁴ *Cape Town has been winning awards since 1580.* (9 May 2020). SAVenues.com. Retrieved from: <http://blog.sa-venues.com/attractions/cape-town-awards/>

¹⁵ *Cape Town voted best city in the world for the 7th year running.* Love Cape Town. Retrieved from: <https://www.capetown.travel/cape-town-voted-best-city-in-the-world-for-7th-year-running/>

accommodation and transportation industries in the City's economic recovery from lockdown and Covid-19.

This tourism recovery plan for the City was launched as the “*Seeing is believing*” campaign which involves online 24-hour live chat capability. It also involves assisting the sector with recovery planning, a Business Incubation Programme as well as targeted industry sessions, recovery training, dedicated business consultant sessions, and partnership onboarding.

Tailored and targeted messaging and marketing to encourage local and international tourists to visit Cape Town as soon as they can is in place and an exciting and easy-to-use “*SMART CITY*” app will be launched.

The recently launched forward-planning and award winning ‘We are worth waiting for!’ campaign¹⁶ encapsulates everything the City has to offer.¹⁷

The main message around the ‘*We Are Worth Waiting For*’ campaign is that until the time comes to explore the City, Cape Town “*will seduce and nurture a long-distance relationship with visitors, both encouraging them to be loved from a distance and creating hope and longing around being reunited when it’s safe to do so*”.¹⁸

7. Realities on the ground

In 2018 the combined tourism and travel sectors employed 9,2% of total number of people employed in SA. This translates to 1 499 700 jobs.¹⁹

Media reports in April 2020 indicated that before the pandemic, tourism accounted for over 1.2 million jobs in SA and contributed more than 8% to economic activity²⁰.

Hotel occupation in SA was down before the lockdown. Before lockdown hotel occupation was at 37% in March 2020 compared to 68% in March last year. But important to note is the fact that hotel occupancy rates in January 2020 were at 57% and 68% in February 2020. These figures are in line with normal trends. It appears that the mounting international awareness of the corona virus was impacting on us domestically long before SA went into lockdown.

¹⁶ *We are worth waiting for*. City of Cape Town. Retrieved from: <https://www.capetown.travel/we-are-worth-waiting-for/>

¹⁷ *We are worth waiting for you*. (22 April 2020) City of Cape Town. Retrieved from: https://www.youtube.com/watch?v=MSHflmQl3nM&feature=emb_title

¹⁸ #BounceBackStrategy. (20 May 2020). City of Cape Town. Twitter. Retrieved from: https://twitter.com/hashtag/CTTBounceBackStrategy?src=hashtag_click

¹⁹ South African Tourism, (2018). Tourism Performance Report: Jan – Dec 2018

²⁰ Smith, C. (26 April 2020). Coronavirus SA's hotel industry decimated 'decimated'. *Fin24*. Retrieved from: <https://m.fin24.com/Companies/TravelAndLeisure/coronavirus-sas-hotel-industry-decimated-20200426-2>

In reality, thousands of people are being affected as business downscale and close and people lose their jobs because of the lockdown. Those most exposed to losing jobs in the sector are people from most vulnerable communities.²¹ It is for this reason, and other reasons demonstrated in the data obtained for this plan, that the tourism sector cannot remain closed until December 2020.²²

8. Events and Conferencing sector

Events and conference organisers place big business in the tourism and hospitality industry but are not recognized by government. Most of the members of an umbrella body representing companies within this sub-sector of the tourism sector have applied on all the relief fund platforms. To date only 2 have received case numbers, while other applicants have heard nothing.

8.1 Events and Conferencing Sector Study

To illustrate how sub-sectors within the tourism and hospitality sector have been impacted on, we undertook a case study in cooperation with an umbrella body that represents the event and conference management sector of.

This study, with the participation of over 30 event and conference management companies found that the businesses they represent have made a loss of **R255 646 416,00** as a result of business that had been booked and confirmed but, as a result of the Covid-19 pandemic, had to be cancelled or postponed. These losses cover the period from February to November 2020. Income made by these companies is on commission earned from the venues when placing business. Only in rare cases do these companies charge a management fee depending on the size of the event. This loss translates into loss of income for many, a loss to the economy and a loss of jobs.

9. Sub-sectors not recognised

Other sub-sectors that remain unrecognised and receive no assistance are tour-guides and tour-drivers. According to the National Federal of Tourist Guides and Affiliates²³ which represents tour guides, there are approximately 15000 registered

²¹ Covid-19: UNWTO calls on tourism to be part of recovery plans. (5 March 2020). UNWTO. Retrieved from: <https://www.unwto.org/news/covid-19-unwto-calls-on-tourism-to-be-part-of-recovery-plans>

²² Smith, C. (30 April 2020). Domestic tourism season likely only to start in December, says minister. *Fin24*. Retrieved from: <https://www.fin24.com/Economy/South-Africa/domestic-tourism-season-likely-only-to-start-in-december-says-minister-20200430>

²³ Cusack, E. (30 March 2020). Tourist guides bid for financial assistance. *Tourism Update*. Retrieved from: <http://www.tourismupdate.co.za/article/198971/Tourist-guides-bid-for-financial-assistance>

tour-guides in SA of which 9000 are currently active. Of these 2000 are qualified national tour-guides who operate as, for example, culture, nature and adventure guides. In reality most tour-guides are one-person operations who work on short-term contract and freelance basis for tour operators, lodges etc. Outside of this sector there is little appreciation for the difficult conditions many of these tour-guides work in because of the nature of the industry. Often they are called on last minute with long hours with days starting at dawn when tourists are picked up for excursions and tours until late at night when the tourists go to bed.

Tourism drivers are also usually not accounted for. Typically they have industry knowledge which they have built up from experience. Unlike traditional drivers, they are trained to be sensitive in situations involving foreign guests and tourists so that these foreigners have the best experience while in SA. The institutional knowledge gained by tourism drivers ensures that, for example, visitors enter a hotel via a correct entrance. They often have knowledge that few others have such as, where clean toilets that a bus full of tourists can use, on a route that only has 3 petrol stations with dirty pay-to-use toilets!

Tour-guides and tour drivers have been under-valued yet provide a most valuable service that often ensures that tourists become repeat tourists to our country.

The Tourism Relief Fund should be widened in scope and reduced in criteria so that all within the tourism sector and its sub-sectors are considered for assistance.

10. Self-catering accommodation

Based on government's tourism recovery plan, all sectors within the tourism and hospitality sector are lumped together. Due to the variety and diversity of this sector, this cannot be the case.

An example is the self-catering accommodation sector. There are many small self-catering venues that, by their very nature and exists singularly to offer privacy and peace away from large concentrations of people, in rural and country areas. Self-catering venues do not have shared spaces such as dining rooms, lounges, bars etc. Each of these cottages are private and are far away from other guests. Guests can self-check in, so that staff are not put at risk and guests do not come into contact with other guests as the emphasis is on privacy. There is no servicing and therefore no risk of transmitting the virus. Sanitising and time delays between guests can be used to ensure safe health practices.

Small businesses who are able to offer their services without any fear of spreading the virus, and thereby stimulating the economy and keeping their staff employed, should be permitted to do so. Small self-catering venues on farms or in isolated mountain

areas are in a totally different category to large hotels that would require different health protocols.

11. Franschhoek accommodation establishments

11.1 Losses of businesses

Franschhoek is one of SA's premier local and international tourist attractions and an asset to tourism in SA. In conjunction with an umbrella body representing accommodation establishments in Franschhoek, a survey about the impact of Covid-19 and the lockdown and its impact on these establishments was conducted between 8 and 11 May 2020. A total of 44 establishments partook in this survey.

The results of the survey reveal that all accommodations are extremely affected by the current situation. It showed that should the lockdown be ongoing until the end of the year, a significant number of businesses will face insolvency. This will have a subsequent negative impact on the local unemployment rate and also on suppliers that will not be paid for services rendered.

A strict lockdown that would be ongoing until November 2020 would see the following:

- that 68% of all accommodation would have to declare insolvency,
- 84% of the accommodation indicate that they must be open before December to avoid bankruptcy.

Key Findings from Covid-19 Impact Study:

- 100% of the accommodations describe their current situation as "Disastrous",
- 70% will be forced to stop paying salaries by August 2020,
- 85% will be forced to stop paying salaries by November 2020,
- 55% of all accommodations are considering retrenchments now,
- 69% of all employees have not received any payment from the UIF,
- 84% of accommodations will only survive if tourism re-starts before December 2020,
- 92% of all accommodation will not be able to pay their bills by December 2020.

11.2 Job losses

The survey also looked at job losses and projected job losses due to the lockdown. A total of 403 units were surveyed. These included hotels, guest houses, lodges and self-catering units. The survey revealed that should a hard lockdown continue, job losses would occur as follows:

- By 31 May 2020: 396 retrenchments will take place (25% of all jobs),
- By 31 August 2020: 1 131 retrenchments will take place (71% of all jobs),
- By 31 December 2020: 1 373 retrenchments will take place (87% of all jobs)

By the end of the year it is projected that at least **2 900** jobs will be lost in the accommodation sector in Franschhoek alone. Considering that not all establishments partook in this survey, the real job losses will most probably be much worse.

11.3 Other businesses in the value chain

Parallel to the loss of jobs in the accommodation sector, other businesses in the value chain are affected and have started retrenching their staff. To name a few, these businesses include;

- Dry cleaners and laundry services working for hotels and guesthouses,
- Gardening services,
- Food suppliers,
- Craftsmen and
- Specialist businesses (such as reservation services; an example is a Cape Town-based reservation service company which has had to lay off 21 of their 31 employees).

12. Western Cape accommodation establishments survey

Western Cape accommodation establishments Covid-19 impact survey took place in mid-May 2020 with the participation of a substantial 27 684 accommodation establishments throughout the Western Cape. Establishments included hotels, guest houses, self-catering establishments and lodges in Cape Town, Stellenbosch and Knysna.

The survey revealed the following scenario should the hard lockdown continue as envisaged by government:

- By 31 May 2020: 15 175 retrenchments will take place (25% of all jobs),
- By 31 August 2020: 44 170 retrenchments will take place (73% of all jobs),
- By 31 December 2020: 53 635 retrenchments will take place (88% of all jobs).

By the end of the year it is projected that at least **112 980** jobs will be lost in the accommodation sector amongst these establishments alone. Considering that there are many more establishments in the Western Cape, the real job losses will definitely be far worse, as the survey included establishments in 3 focus areas.

The results mirror closely the survey results of the focused area Franschhoek survey. In other words, the Franschhoek survey demonstrates that it is a microcosm of what is projected to take place in the province and indeed nationally.

13. Route 24 adapts to Covid-19 circumstances

Route 24 is a conglomerate of 25 lodges that stretch across Gauteng (Magaliesburg) and the North West (towards Rustenburg) Provinces. A mere 80 to 120km local travel distance for guests. The route has 128 Units, 467 Beds and employ no less than 163 staff members and cumulatively they have been in business for 146 Years.

Route 24 as a whole has been extremely hard hit by Covid-19 where all reservations were either cancelled (with refunds) or postponed where possible. As an example, a Route 24 lodge with 3 units has had to cancel every booking from April to June 2020. This means that the lodge has lost more than R 100 000,00 for that 3 month period in accommodation. Extrapolating this figure to all establishments within Route 24 over that period equates to over **R 12 600 000,00** loss in accommodation alone.

A number of Route 24 members also offer hiking trails, biking trails, birding, fishing etc. which would be an additional loss of income, or alternatively, a source of income if sectors of the Tourism sector would be allowed a lighter lockdown level. This is particularly relevant as all these activities normally practice social distancing in any event.

Magaliesburg alone has seen a number of businesses that form part of our history close down due to Covid-19. It has hit the hospitality and tourism sector very hard throughout the route which runs from Magaliesburg through to Rustenburg.

All members of Route 24 have worked hard together pull from every resource available to keep their businesses alive and food on the table for their staff, ensuring job losses are kept to a minimum.

However, as of 12 May 2020, they embarked on advising all Route 24 Members on the retrenchment process for staff. In most cases, another 3 weeks of lock down will force businesses to shut their doors.

On average the staff employed are sole bread winners for no less than 10 people each amounting to 1630 people. This would be catastrophic! A representative of Route 24 indicated that if people are not dying of starvation they will start to commit crime in order to feed their families.

Route 24 establishments reiterated what the self-catering sub-sector indicated to us, which was the following;

- The majority of their members do not have reception areas which in turn means less contamination.
- Their accommodation units / cottages are far apart so chance of contamination is minimal.
- They are situated in rural areas so we are not densely populated.

- The majority of their accommodation is self-catering.
- When booking guests in they can ensure that there are only 2 guests per unit / cottage if required.
- Strict sanitising methods would be adhered to at all times.

One of the accommodation business owners submitted that most of this class of accommodation is well equipped to cope with guests through this pandemic because practicing social distancing is easy due to the manner that lodges are set out.

14. Boutique and exclusive accommodation

A submission from a manager of a portfolio of boutique hotels indicates that all hotels and accommodation classes cannot be classified “*as a whole in terms of risk.*” Boutique hotels have limited rooms, some are set in large estates, have large public areas, grounds and gardens. Such specialised hotels have small compliments of staff. Therefore the mitigation of the risk of the spread of Covid-19 is easier for such establishments than larger hotels, mainly due to the fact that boutique hotels have less guest traffic.

15. Some tourism sub-sectors need to open up soon

It is clear that some sectors should open up soon, and are ready to do so. As the next levels of lockdown are declared, more business will take place. This will mean that business people will be more active and may require to travel and stay overnight away from their home. Accommodation to cater for this market needs to be open and available for them.

Additionally, if businesses and sectors within the tourism and hospitality sector do not open up, it will mean that more South Africans will lose their jobs as businesses in the sector are forced to downscale or close. This is demonstrated in the surveys undertaken and the submissions received. The timelines as indicated in the NDT’s Tourism Recovery Plan will mean that there will be nothing left of tourism by the end of the year.

As the economy opens up so the sector needs to also open to meet the economic activities that will take place. Certain hospitality classes thus need to be permitted to open up at certain lockdown levels. In every instance hygiene protocols and social distancing practices would need to be in place.

But under lockdown regulations, tourism establishments fall under non-essential services, and the industry has been dealt heavy blows by travel restrictions as well as consumer concerns over the need to maintain physical distancing.

15.1 Tourism sub-sectors should follow a phased approach

Tourism as a sector can therefore not be classified uniformly right across the board. The sector and sub-sectors would need to start opening up always with the objective of keeping the risk of transmission as low as possible.

Bigger accommodation establishments, such as large hotels, and places that have high congregation areas, such as restaurants, would be permitted to gradually open within limitations.

Such limitations would, depending on the level, include;

- take away for food: any restaurant or fast food outlet should be allowed to open their kitchens for home delivery purposes only in hard lockdown levels compared to soft lockdown levels,
- All online food and delivery services is encouraged and is completely open.

All of these approaches would require strict social distancing adherence and the wearing of Personal Protection Equipment (PPE) for staff.

16. Hospitality

The goal is to ensure that as much social physical distancing takes places even as other lockdown restrictions are lifted or levels change.

This is important as this prepares the ground work for SA to become a 'smart tourism' destination, which is based on the well-being of tourists and employees in the sector.

Lockdown levels within the tourism sector depends on the lockdown level that other sectors are in at that point of time.

It will become mandatory for hotels, tourist sites or tourist attractions (such as museums) or any area that receives people to adhere to the following protocols:

1. Cleaning materials that meet the required specifications must be stocked and utilized,
2. All staff must be fully trained and equipped on the required hygiene and protection protocols.

16.1 Accommodation

Venues such as large hotels, must be designed and equipped to ensure that social distancing is practiced. As an example, reception areas must be marked in such a manner that ensures that staff (who are equipped and wear PPEs) behind counters are at an acceptable social distance from guests. In the case of its restaurants, tables and chairs must have sufficient distance between them.

Stage 1 (Open): Accommodation establishments are fully open for guests. Tourism sites are operational under normal conditions.
Stage 2 (Soft Open): Accommodation establishments and tourism sites are limited to 50% capacity.
Stage 3 (Soft Lockdown): “Traditional” accommodation establishments, such as hotels, resorts, guest houses, backpackers, Bed and Breakfasts and lodges, are limited to 25% capacity. Accommodation that normally supplied catering of any description, such as breakfasts or restaurants attached to hotels, would remain closed but would prepare ready-made food for guests who would have the food delivered or pick the food up within the required hygiene protocols. Tourism sites to remain closed. Self-catering accommodation and online booked rental accommodation, where minimal contact is made with other people, irrespective of staff or other guests, should be allowed to trade. Accommodation that is booked and confirmed online where minimal contact is made with anyone else on arrival at the accommodation should be allowed to open.
Stage 4 (Hard Lockdown): Accommodation establishments to be used for quarantines purposes only. All tourism sites to remain closed.

16.2 Restaurants

Before establishments such as restaurants are in a position to operate their sit-down areas (in softer lockdown levels), they should be permitted to continue selling packaged food which must be delivered to the client at their home through an online delivery service (in hard lockdown levels). This has already been successfully done by restaurants.²⁴

Below is the smart approach to restaurants including on-consumption alcohol sales. Restaurants will need to be strict enforcers of social distancing and an innovative way is through perspex shields between patrons. This has successfully been done in Asian countries.

²⁴ Maxwell, K. (22 May 2020). Balancing the books on food to go. *Daily Maverick*. Retrieved from: <https://www.dailymaverick.co.za/article/2020-05-22-balancing-the-books-on-food-to-go>

Stage 1 (Open): Restaurants may resume normal trade with a maximum of 6 people per table which should include a perspex screen between patrons. On-consumption alcohol sales permitted.

Stage 2 (Soft Open): Restaurants may seat a maximum of 50 people at any one time. There will be a limit of 4 people per table which should include a perspex screen between patrons. On-consumption alcohol sales permitted.

Stage 3 (Soft Lockdown): Restaurants may only have their kitchen preparing ordered food through online delivery services. No on-consumption alcohol sales permitted.

Stage 4 (Hard Lockdown): Restaurants may only have their kitchen preparing ordered food through online delivery services. No on-consumption alcohol sales permitted.

17. Tourism and travel

Domestic and international tourism practitioners all agree that the immediate focus for countries, as they start lifting hard lockdowns, should be domestic tourism. Until we are ready to open our international borders this should be our focus. This would mean that our provincial borders would need to open up as the economy starts reigniting and accelerating. Regulations need to be amended to allow South Africans the freedom to unfetteredly travel between provinces.

17.1 Domestic tourism

Statistics produced by StatsSA²⁵ indicate that before the pandemic local tourism was very active and was growing despite economic downturn during that period;

DAY TRIPS	2019 (Jan-Jun)	2019 Percentage	2018 (Jan-Dec)	2018 Percentage	2017 (Jan-Dec)	2017 Percentage
	('000)		('000)		('000)	
January	3 534	12,2%	3 127	7,5%	5 148	10,8%
February	4 650	16,0%	2 904	7,0%	4 109	8,6%
March	5 969	20,5%	3 036	7,3%	4 743	10,0%
April	5 311	18,3%	3 583	8,6%	3 842	8,1%
May	5 703	19,6%	3 389	8,1%	4 443	9,3%
June	3 909	13,4%	3 106	7,5%	3 533	7,4%
July			2 797	6,7%	3 390	7,1%
August			3 150	7,6%	3 472	7,3%
September			3 297	7,9%	3 595	7,6%
October			4 579	11,0%	3 551	7,5%
November			3 944	9,5%	3 274	6,9%
December			4 722	11,3%	4 439	9,3%

²⁵ Domestic Tourism Survey 2018 Report: January – December 2018 (30 September 2019). StatsSA & Domestic Tourism Bi-Annual Report 2019: January – June 2019 (12 December 2019). StatsSA

Totals	29 076	100,0%	41 634	100,0%	47 540	100,0%
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OVERNIGHT TRIPS	2019 (Jan-Jun)	2019 Percentage	2018 (Jan-Dec)	2018 Percentage	2017 (Jan-Dec)	2017 Percentage
	('000)		('000)		('000)	
January	4 658	16,0%	4 346	9,4%	3 896	8,8%
February	3 922	13,5%	2 794	6,0%	2 595	5,8%
March	5 519	19,0%	3 678	7,9%	3 122	7,0%
April	7 045	24,2%	4 191	9,0%	4 682	10,5%
May	4 292	14,8%	2 929	6,3%	3 008	6,8%
June	5 625	19,3%	3 160	6,8%	3 534	8,0%
July			3 082	6,6%	3 664	8,3%
August			3 937	8,5%	3 008	6,8%
September			3 520	7,6%	3 704	8,3%
October			3 582	7,7%	3 057	6,9%
November			3 067	6,6%	2 729	6,1%
December			8 180	17,6%	7 382	16,6%
Totals	31 061	106,8%	46 466	100,0%	44 381	100,0%

The above table shows that there was a slump in day trips in 2018 but the trends in 2019 until June appear to be reversing that. The overnight trips have been increasing steadily since 2017.

The above table reflects statistics for the period January to June 2019 as this is the only latest data for 2019 available from StatsSA.

Tourism in SA is primarily driven by 64% leisure travellers and 36% are business travellers. As far as tourism spend is concerned, 44% of the tourism spend came from international travellers and 56% from domestic travel.²⁶

17.2 Domestic tourism is lucrative

Local tourism has been proven to be lucrative, as illustrated by statistics compiled by StatsSA;

DOMESTIC EXPENDITURE	('R'000)	('R'000)	('R'000)
	Jan-Jun 2019	Jan-Dec 2018	Jan-Dec 2017

²⁶ JT Steinmetz, (2018) WTTC revealed why South Africa is the largest tourism economy on the continent. *Travel Wire News*, <https://travelwirenews.com/wttc-revealed-why-south-africa-is-the-largest-tourism-economy-on-the-continent-1311600/>

DAY TRIPS	Shopping	21 028 361	13 545 580	6 946 048
	Domestic travel	10 163 311	10 189 940	8 811 461
	Food and beverages	6 259 936	6 485 150	5 477 392
	Recreation & culture		727 565	634 955
	Other		1 299 367	1 096 436
	Totals	37 451 608	32 247 602	22 966 292

OVERNIGHT TRIPS	Shopping	8 670 967	22 922 553	22 112 687
	Domestic travel	10 713 875	20 738 430	20 563 401
	Food and beverages	5 546 739	11 431 608	10 308 978
	Accommodation	6 132 013	10 820 891	7 637 202
	Recreation & culture		917 666	775 327
	Other *	1 095 373	1 481 849	1 650 455
	Totals	32 158 967	68 312 997	63 048 050

* 'Other' includes security related costs, financial services, travel insurance, medical supplies, child care, etc.

The table above shows that there was an increase in the total money spent by domestic tourist between 2017 and the first 2 quarters of 2019. The first 6 months of 2019 almost matches the 12 months of 2018.

Although the statistics for only the first 6 months of 2019 are available, the table shows that in all categories the trend is up despite an economic down-turn during the period from 2017 to 2019.

Based on this data and the various surveys undertaken, a smart lockdown phased approach should take place as follows;

Stage 1 (Open): Domestic and international air travel resumes with hygiene protocols and social distancing practices followed.
Stage 2 (Soft Open): Domestic air travel resumes, but not international travel, with hygiene protocols and social distancing practices followed.
Stage 3 (Soft Lockdown): Inter-province road travel may take place. Hygiene protocols and social distancing practices are followed.
Stage 4 (Hard Lockdown): No travel takes place, minimum travel takes place confined to one's province.

18. What factors should be included in a recovery plan

Our research shows that the following recommendations should be included in a tourism recovery plan for the immediate term.

The recommendations are divided into three key parts:

- A. Managing the crisis and mitigate the impact**
- B. Providing stimulus and accelerating recovery**
- C. Preparing for the future**

The recommendations are compiled with in the following points in mind:

1. As stated earlier, due to the manner in which government is set-up, the NDT is reliant on other government departments to fulfil many functions required to make tourism work. The following recommendations therefore would need to be addressed by other departments that impact them as well. It is for this reason that we stress that now more than ever an *inter-ministerial coordinating committee*, that we called for last year, is needed. ***These recommendations are possible only if there is coordination and cooperation from all departments concerned.***
2. International experience demonstrates that tourism has a capacity to bounce back and, as a result, assist in the recovery of other sectors, thus assisting in job creation and economic recovery in other sectors as well. In addition, tourism can facilitate cultural exchange and understanding, countering discrimination and prejudice.
3. As an inter-personal sector, tourism is particularly vulnerable to crises that cross borders. In this instance:
 - Every aspect of this sector has been halted, from the largest and busiest airline to the smallest boutique hotel and accommodation in rural communities.
 - This halt has affected the livelihoods of workers and suppliers within the tourism and travel sector and, by implication, the families of these workers and suppliers as well.
 - The closing down of the entire country, and even provinces where people may not generally travel between provinces has brought the tourism and travel sector to a complete halt.
 - Because tourism can only exist because its interlink with other sectors the impact is also felt in other sectors.
 - Tourism is a key employer of vulnerable groups, such as people in rural areas.

19. Summary of recommendations

Our research and data shows that the following recommendations should be included in a tourism recovery plan for the immediate term, and are aimed at providing a framework to help mitigate the further impact of the crisis; prevent further job losses, provide stimulus for economic recovery and guide the development and resilience of the sector.

A. Managing the crises and mitigate the impact

1. Incentivise job retention, sustain the self-employed and protect the most vulnerable
2. Support companies' liquidity
3. Review taxes, charges, levies and regulations impacting travel and tourism
4. Include tourism in national, provincial and municipal economic emergency packages
5. Create crisis management mechanism and strategies

B. Providing stimulus and accelerating recovery

6. Provide financial and infrastructure development for tourism investment and operations
7. Advance travel facilitation
8. Understand the market and act quickly to restore confidence and stimulate demand
9. Boost marketing, events and meetings

C. Preparing for the future

10. Invest in partnerships
11. Diversify markets, products and services
12. Reinforce tourism governance at all levels
13. Prepare for crisis, build resilience and ensure tourism is part of national emergency mechanism and systems
14. Place sustainable tourism firmly on the national agenda

20. Recommendations

A. Managing the crises and mitigate the impact

Hundreds of thousands of livelihoods are directly dependent on the tourism, hospitality and travel sector. If one takes the number of people indirectly affected by this sector then millions are potentially affected. It is for this reason that these measures should urgently be implemented.

Supporting businesses by softening the lockdown focusing on specific sub-sectors will restore confidence and will ensure that more jobs are not lost.

1. Incentivise job retention, support the self-employed and protect the most vulnerable
 - Provide special incentives and relief funds for companies in the sector, including time-bound exemptions or a reduction of payments to government.
 - Relax labour regulations pertaining to short-term or temporary employment.
 - Promote effective dialogue between companies and unions with the objective of relaxing all labour legislation and regulations.
2. Support companies' liquidity
 - Allocate specific emergency funds to support the most affected companies so that they can avoid bankruptcy and restart operations.
 - Support companies' liquidity through temporary exceptions and deferred payments.
 - Develop investment mechanisms that provide liquidity to the tourism industry especially to SMMEs, particularly in the short-term.
 - Municipalities should be encouraged to implement temporary exceptions, temporary payment breaks or reductions on rate bills.
 - Develop easy mechanisms to defer the payments of various government taxes without the need for complicated bureaucracy or red tape.
 - Reduced unnecessary criteria so that all that have applied to the Relief Fund have a fair opportunity to be assisted.
3. Review taxes, charges, levies and regulations impacting travel and tourism
 - Review all taxes, charges and levies impacting on tourism and travel and related activities.
 - Provide temporary suspension or reduction of travel and tourism taxes, charges and levies in a fair, non-discriminatory and transparent manner.
 - Review regulations and consider flexible implementation of rules related to the operation of tourism and travel companies, such as the streamlining and speeding up of applications for Public Road Carrier Permits.
4. Include tourism in national, provincial and municipal economic emergency packages
 - Ensure tourism and travel suppliers are fully integrated in national, provincial and local emergency, mitigation and support packages, including the identification of key tourism attractions and assisting municipalities to develop

tourism plans with the objective of attracting tourism which will create job opportunities and grow the local economy.

- Ensure that nationally that SMMEs in the tourism sector are supported by being included in support programmes, including programmes operated by international organisations such as the World Bank and the International Monetary Fund.

5. Create crisis management mechanism and strategies

- Create mechanisms at all levels to manage the crisis engaging all stakeholders in an open and transparent manner.
- Ensure a unified message in support of consumer confidence and positive public perception.
- Develop media relations so that government can effectively communicate with the public on its actions in an open and transparent manner.
- Prepare a strategy to support tourism preparedness for future mitigation and recovery needs.

B. Providing stimulus and accelerating recovery

Due to the unmatched fall in demand sparked by the Covid-19 pandemic, the travel, hospitality and tourism sector, and all related sub-sectors, will require financial stimulus, the opening up of the market and the softening of the lockdown to support an immediate recovery.

This opportunity should also be taken to place tourism at the centre of national policies where tourism contributes to the much-needed growth in the economy while this sector recovers and grows.

6. Provide financial and infrastructure development for tourism investment and operations

- The upgrade and maintenance of roads to and from small towns and remote areas will open up tourism opportunities in these areas. Not doing this could have dire consequences as explained by the president of Kruger Lowveld Chamber of Business and Tourism, Oupa Pilane, who explained that “*poor roads could force Lowveld Tourism to its knees*”.²⁷ Neglecting roads such as these would have detrimental impact economically and from a tourism perspective.²⁸

²⁷ De Villiers, S., (6 April 2018). Poor roads could force Lowveld tourism to its knees. *Lowvelder*. Retrieved from: <https://lowvelder.co.za/428595/poor-roads-force-lowveld-tourism-knees/>

²⁸ Poor road conditions a challenge to the potential of Mpumalanga's Panorama Route. *Bizcommunity.com*. Retrieved from: <https://www.bizcommunity.com/Article/196/373/175486.html>

- Promote and fast-track investment in infrastructure in partnership with the private sector and offer incentives for foreign direct investment in tourism.
- Speeding up processes with regards to independent power producers and suppliers to expand and improve efficiency and competitiveness.

7. Advance travel facilitation

- Ensure that domestic travel restrictions introduced, amended or lifted in response to the Covid-19 pandemic are continuously assessed and remain proportionate to the public health threat based on local risk assessments. This should be done in coordination with other destinations.
- Ensure that information on travel restrictions, if required, is accessible, consistent and reliable and shared as widely as possible.

8. Understand the market and act quickly to restore confidence and stimulate demand

- Communicate transparently and support tourist destinations and companies to restore confidence among local consumers to restart travel as soon as health conditions allows for it.
- Invest in data and intelligence systems to monitor behaviour, anticipate trends and adjust product design and marketing strategies.
- Identify and design special promotions for local markets and local market segments that tend to bounce back more quickly.
- Promote domestic tourism as South Africans are expected to be among the first to travel again and stimulate tourism demand. Plans should be in place for marketing activities and incentives that will facilitate domestic travel. This includes more competitive prices, special promotions or travel incentives.
- Separate pricing structures should be introduced for South Africans as opposed to international visitors in the future.
- Considering the impact of the crisis, efforts must be made to accelerate off-peak tourism products. This can include campaigns for special events.
- Harness modern media methodologies such as social media in promoting the positive impact of travel, particularly in domestic markets.

9. Boost marketing, events and meetings

- Support national, provincial and municipal tourism organisations in boosting marketing campaigns.
- Allocate funds to help attract domestic conferences and events, organise local events and support recovery in less resilient destinations, such as rural areas, particularly those that are more dependent on tourism.

- Invest in digital marketing to ensure targeted actions and enhanced return on investment.
- Incentivise development in products, market segments and marketing activities that contribute to a more responsible and sustainable travel and tourism sector.
- Undertake campaigns encouraging informed and responsible travel that contributes to local economies, protects cultural heritage and natural resources.

C. Preparing for the future

Tourism has the potential to recover and again establish itself as a key part of the local, provincial and the national economy. This crisis may also offer a unique opportunity to shape the sector to ensure it not only grows but it grows better. In addition, to build for the future, special attention must be placed on building resilience and on promoting sustainability.

10. Invest in partnerships

- Create a Tourism Recovery Committee with representatives from the tourism sector at all levels and government and the private sector to set up a common plan of action with clear objectives and set responsibilities, where such plans would be monitored against targets set.

11. Diversify markets, products and services

- Work to make domestic travel more competitive through enhanced competition, connectivity and travel facilitation.
- Provide more vulnerable communities and groups with the capacity to develop new tourism products supporting rural regions and disadvantaged communities.
- Enhance local Social Tourism schemes aimed at seniors, families, youth and other niche markets.

12. Reinforce tourism governance at all levels

- Create national tourism governance mechanisms that fully engage the private sector, local communities and promote an inclusive and holistic government approach to tourism development.
- Develop and strengthen Destination Management Organisations for an effective and sustainable development of tourism at focused local areas.

13. Prepare for crises, build resilience and ensure tourism is part of national emergency mechanisms and systems

- Review all the lessons learned, including the need to improve risk assessment and crisis preparedness within both the public and private sectors.
- Ensure that the tourism and travel sector are included in national emergency mechanisms and systems.
- Create Tourism Emergency Plans which includes being prepared for future crises in the tourism sector.

14. Place sustainable tourism firmly in the national agenda

- Ensure the inclusion of tourism as a national priority, recognising the capacity of this sector to create jobs, to promote economic growth and sustainability.
- Create a whole government approach to tourism development by establishing an inter-ministerial, Tourism Councils for the coordination of government activities and policies nationally, provincially and at municipal area.