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Unlocking the potential of domestic tourism in uncertain times: Lessons from the COVID-19 pandemic in South Africa¹

Abstract. This study seeks to investigate the capacity of domestic tourism to revive the tourism industry in South Africa during uncertain times using the experiences of the COVID-19 pandemic. The authors argue that domestic tourism should be promoted as a way of offsetting losses experienced when international tourism is in decline. The purpose of the empirical study was to assess perceptions and attitudes regarding domestic tourism in South Africa. A self-selected sample of 350 respondents living in South Africa were asked about their travel behaviour and tourism practices in 2019 and 2020 as well as their post-pandemic travel plans. The authors believe that domestic tourism has the capacity to stimulate tourism growth in uncertain times after the recent pandemic, as most of the respondents indicated their willingness to travel more domestically after the pandemic and to engage in different types of local tourism. However, they emphasized the need to reduce prices in order to ensure that domestic customers could afford domestic tourism products offered during times of external shocks.

Keywords: domestic tourism, South Africa, COVID-19, tourism management, sustainability

JEL Codes: L83, Z32, Z38

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1. Introduction

Tourism is one of the key industries in South Africa, having contributed (directly and indirectly) 6.9% to the gross domestic product (GDP) in 2019, 3.7% in 2020 and 3.2% in 2021 (Statistics South Africa, 2022; South African Government, 2022; South African National Department of Tourism, 2020; World Travel and Trade Council [WTTC], 2022; Bama & Nyikana, 2021). Over the years, the tourism industry has been able to create employment opportunities, boost the country's economy, improve the infrastructure and preserve the local culture, in addition to other benefits (Arbulú et al., 2021; Bama & Nyikana, 2021; Bayih & Singh, 2020a; Giddy & Rogerson, 2021; Harilal & Nyikana, 2019; Mazambani & Mutambara, 2018; Njoya & Nikitas, 2020; Rogerson & Rogerson, 2019, 2022b). With regard to the infrastructural development, South Africa has systematically invested in the improvement of roads, airports, buildings, stadiums, telecommunications services, safety and security and other elements of the tourism infrastructure (Booyens, 2010; Dlomo & Ezeuduji, 2020; Mazambani & Mutambara, 2018). South Africa's development policy and the rapidly growing tourism industry has led to the creation of many new businesses and, consequently, many direct and indirect jobs (Molefe et al., 2018; Rogerson & Rogerson, 2022b). According to reports by the South African National Department of Tourism (2020) and the WTTC (2022), in 2019 751,200 jobs in South Africa were directly associated with the tourism sector; in 2020 this figure decreased to 478,900. South African National Department of Tourism (2020) reported that between the period of 2015 and 2019, tourism's direct contribution to GDP was the highest in 2019 (3.7%) compared to 2.7% in 2018 and 2.6% in 2017. These statistics reflect improvements made with a view to promoting the thriving market of international and domestic tourism in the country. In more recent times however, there has been suggestion for more focus on domestic tourism (Nengovhela, Tshipala & Nyikana, 2017; Rogerson & Rogerson, 2019).

In the last few years South Africa has seen a notable growth in domestic tourism. According to reports by the South African National Department of Tourism (2020, 2019), domestic tourism direct spending increased from ZAR 26.5 billion in 2016 to ZAR 43.9 billion in 2019. Thanks to promotional efforts, more inhabitants of the country have been making use of the market offering regarding domestic tourism (Goliath-Ludic & Yekela, 2020). Despite perceptible economic gains that have been observed from tourism, the outbreak of the COVID-19 pandemic raised questions about the sustainability of international tourism and its ability to generate revenue in times of external shocks (Arbulú et al., 2021; Bama & Nyikana, 2021; Butler, 2020; Hall, Scott & Gössling, 2020; Rogerson & Rogerson, 2021;

Sharma, Thomas & Paul, 2021). During a period of uncertainty, when the international tourism market can no longer be relied upon, the most realistic option for recovery of the tourism industry is to focus on the domestic market (Arbulú et al., 2021; Bama & Nyikana, 2021; Rogerson & Rogerson, 2019). In the context of the COVID-19 pandemic, this strategy has been adopted by most economies around the world in an effort to offset losses associated with the drastic decline in international travel activity (Adinolfi, Harilal & Giddy, 2021; Avraham, 2020; Ezeuduji & Dlomo, 2020a; Hattingh, 2022; Matiza & Slabbert, 2022; Nyikana, Tichaawa & Kimbu, 2021; Rogerson & Rogerson, 2022b). The South African government responded to the pandemic by imposing a national lockdown, which began on the 26th of March 2020 and was lifted on the 5th of April 2022 (South African Government, 2022). The lockdown restrictions included a total ban on travel (Assaf & Scuderi, 2020; Dube, 2021; Rogerson & Baum, 2020), a requirement to stay indoors except in order to obtain essential services (Adams et al., 2021; Mahlati, 2020), a requirement to wear masks in public spaces (Rogerson & Baum, 2020) and a ban on social gatherings and events (Bama & Nyikana, 2021).

One of the negative consequences of these measures was a notable decline in international tourist arrivals and in the demand for domestic tourism services (Arbulú et al., 2021; Bartis, Hufkie & Moraladi, 2021; Newsome, 2020; Rogerson & Rogerson, 2020a, 2022b; Sharma et al., 2021; Sucheran, 2021a, 2021b). Although the measures were subsequently lifted in April 2022 and the tourism industry has started recovering, an argument can be made for a rethink of the direction of tourism in South Africa. The authors of the following study argue that instead of relying on international tourism, the industry should concentrate on building a vibrant, profitable and sustainable domestic tourism market, which would ensure that in times of uncertainty and external shocks, losses resulting from declining levels of international tourism would not be as severe as those suffered during the COVID-19 crisis. Moreover, a strong domestic tourism market can provide a good basis for the development of international tourism (Nengovhela et al., 2017).

2. Literature review

2.1. Overview of domestic tourism in South Africa

Domestic tourism in South Africa could play a critical role when international tourism is going through an off-peak period or is experiencing a downturn. In such times domestic tourism in the country could help to stabilize the economy and sustain the tourism industry (Arbulú et al., 2021; Bama & Nyikana, 2021; Makhaola & Proches, 2017; Mutizira, 2021; Nengovhela et al., 2017). Even in

times when international tourism performs well, it does so on the back of a strong and vibrant domestic tourism environment (Nengovhela et al., 2017). The domestic tourism market has shown its potential during major sporting and business events that have been hosted in South Africa (Nyikana, 2016). When South Africa hosts these events, the number of domestic tourist trips tends to increase. Although domestic tourism in South Africa is considered to be important, it has been neglected as a result of efforts to market South Africa to international tourists rather than domestic tourists (Adinolfi et al., 2021; Rogerson & Rogerson, 2020b; Stone & Nyaupane, 2020; Woyo, 2021). Owing to the country's excessive dependence on revenues from foreign tourists, especially since the country became a constitutional democracy in 1994, its domestic tourism industry has not been performing optimally despite its potential (Musavengane et al., 2022; National Department of Tourism [NDT], 2011). Because of this international orientation, the country has been criticized for not prioritizing domestic tourism as an important part of the tourism industry (Adinolfi et al., 2021; Woyo, 2021).

In the last five years (2018-2022), promotional strategies have been implemented in order to encourage domestic tourism activity in South Africa and more efforts have been made to strengthen this sector so that it can also generate economic growth during traditional off-peak seasons in international tourism (Adinolfi et al., 2021; Dlomo & Ezeuduji, 2020; Ezeuduji & Dlomo, 2020b; Kruger & Douglas, 2015; NDT, 2011; Nengovhela et al., 2017). Such promotional strategies include the "Sho't Left" campaign, the "buy now – travel later" campaign and the "whatever you are looking for, it is here" campaign (Adinolfi et al., 2021; Mutizira, 2021; TRALAC, 2020). The Sho't Left campaign was launched by South African Tourism² in order to encourage all South Africans to participate in domestic tourism by travelling more within the country (Adinolfi et al., 2021; Aina & Ezeuduji, 2021; Dlomo & Ezeuduji, 2020; NDT, 2011). Considering the challenges that the domestic market has been faced with, such as unemployment, poverty and inequality, the campaign was also designed to promote affordable packages offered in the domestic tourism market (Arbulú et al., 2021; Lekgau et al., 2021; Henama & Sifolo, 2018; Rogerson, 2015).

The main purpose of the "buy now – travel later" campaign, was to provide domestic tourists with an opportunity to purchase holiday packages that they could use at a later date when they have free time and are also more financially capable to engage in domestic tourism activities (NDT, 2022; TRALAC, 2020). Finally, the "whatever you are looking for, it is here" campaign was implemented by the NDT's Domestic Tourism Branch as part of the Domestic Tourism Growth

² South African Tourism is the tourism marketing arm of the South African government.

Strategy to create a holiday culture that encourages participation in domestic tourism by people from higher and lower status groups in order to contribute towards the country's economy (Kruger & Douglas, 2015; NDT, 2011; Rogerson, 2015). Collectively, these campaigns have played a major role in improving the consumption of domestic tourism services (Kruger & Douglas, 2015; Lekgau et al., 2021; NDT, 2022; Rogerson, 2015; TRALAC, 2020).

The importance of domestic tourism also consists in its ability to survive during times of uncertainty and external shocks, when international tourism is experiencing a downturn (Makhaola & Proches, 2017; Mutizira, 2021; Ndlovu et al., 2010). However, when domestic tourism in countries that rely heavily on international tourists is weak and unable to revive the tourism industry during uncertain times, the likely outcome is an economic depression and instability (Bayih & Singh, 2020b; McKay et al., 2019; Ndlovu et al., 2010; Woyo, 2021). This is why it is crucial for South Africa to take more decisive steps in the future in order to build a vibrant, profitable and sustainable domestic tourism market that will be able to survive during crises such that losses resulting from declining levels of international tourism would not be as severe as those suffered during the COVID-19 crisis.

2.2. COVID-19 and the tourism industry in South Africa

The outbreak of the COVID-19 pandemic in December 2019 caused severe challenges for countries all over the world (Arbulú et al., 2021; Gössling et al., 2020; Hall et al., 2020; Kumari & Shukla, 2020; Niezgodá & Markiewicz, 2021; Rogerson & Rogerson, 2021, 2022a; Telukdarie et al., 2020). Like practically everywhere else, the pandemic had a dramatic impact on the tourism industry in South Africa, especially at the beginning, when all travel into and out of the country was brought to a standstill, causing a drastic decline in the demand for tourism services (Bama & Nyikana, 2021; Bartis et al., 2021; Moya Calderón et al., 2021; Mutizira, 2021; Sharma et al., 2021; Sucheran, 2021b). The WTTC (2022) reported that there was a major decline in domestic tourism's direct and indirect spending in South Africa. According to the report, domestic tourism spending, which amounted to ZAR 187.7 billion in 2019, fell by 54.1% to ZAR 86.2 billion in 2020. An even greater decline was observed for domestic tourist arrivals, which fell by 62.1%, from 14,896,859 in 2019 to 5,649,023 in 2020 (South African National Department of Tourism, 2020). In the last two years, South Africa has implemented several response measures to counteract the impact COVID-19 has had on the domestic tourism sector. Some of these measures are discussed in the section below.

2.3. A stronger domestic tourism sector in South Africa as a safeguard against external shocks

Because domestic tourism has started taking off again in South Africa since the lifting of the travel restrictions in April 2022, the authors of this study analysed the recovery process taking into account key factors that determine the consumption of domestic tourism services, which include affordability, opportunities for consumption, consumer confidence as well as advertising and marketing (Acha-Anyi, 2015; Bama & Nyikana, 2021; Camilleri, 2018; Ivanova, Ivanov & Ivanov, 2020; Matiza & Kruger, 2022; Mazambani & Mutambara, 2018; Oosthuizen & Ferreira, 2019; Rogerson & Rogerson, 2021; Sharma et al., 2021; TRALAC, 2020). Authors of these studies argue that it is important for tourism authorities, like the South African Tourism (SAT) and the South African National Department of Tourism, to evaluate the financial implications of the pandemic, particularly affordability of domestic tourism experiences, and devise appropriate strategies to address them (Arbulú et al., 2021; Arndt et al., 2020; Bama & Nyikana, 2021; Christianson, 2020; Hao, Xiao & Chon, 2020; Sucheran, 2021a; Telukdarie et al., 2020).

As regards affordability, one strategy adopted by tourism businesses during the pandemic was to decrease prices of tourism products by offering discounts in the hope of encouraging customers to make use of the offering of domestic tourism (Rogerson & Rogerson, 2021). Opportunities for consumption are associated with the amount of free time that people have to participate in tourism (Oosthuizen & Ferreira, 2019). According to Suliman Khan et al. (2020) as well as Jaboulani C. Nyawo (2020), after lockdown restrictions were lifted and tourism businesses were able to resume their operations, some of them have extended their working days and hours in order to make up for the losses sustained during the lockdown. Another aspect that tourism authorities need to focus their efforts are ways of rebuilding consumers' trust and confidence and shift their preferences towards domestic tourism so that it can thrive during uncertain times when international travel is restricted (Bama & Nyikana, 2021; Makhaola & Proches, 2017; Mutizira, 2021; Nengovhela et al., 2017). At the start of the pandemic, OECD recommended (2020) that government officials should communicate effectively and be transparent with the public about the development of the COVID-19 pandemic in order to facilitate a safe resumption of tourism activity and economic recovery. Other measures that should be taken in order to help South Africa recover from external shocks like the recent pandemic include effective vaccination rollouts, collaboration amongst tourism authorities, employee training and the use

of digital technology (Ekwebelem et al., 2021; Leshem & Lopman, 2021; Moya Calderón et al., 2021; Nhamo, Dube & Chikadzi, 2020b; Oosthuizen & Ferreira, 2019; Rogerson & Rogerson, 2021).

In the future, South Africa should focus on strengthening domestic tourism in order to safeguard development in times when international tourism is in decline (Adinolfi et al., 2021; Matiza & Slabbert, 2022; Rogerson & Rogerson, 2022c; Woyo, 2021). The government should incentivise tourism businesses to create demand for domestic tourism products (Bama & Nyikana, 2021; Rogerson et al., 2021), for example by raising public awareness of the domestic tourism offering.

3. Methodology

The empirical study was an online survey conducted among residents of South Africa aged 18 or older, who self-selected to participate. The questionnaire form started with a screening question to ensure that it was only residents of South Africa who could participate in the survey.

The questionnaire consisted of closed-ended questions and was created using Google Docs. The link to the survey was distributed on social media, such as LinkedIn, WhatsApp and Facebook between August and September 2021. Those who agreed to participate were encouraged to share the link with their eligible contacts (South African residents aged 18 or older). In addition to providing respondents' basic demographic profiles, the survey questions were designed to collect information about their perceptions of, and attitudes towards, domestic travel and the impacts of the COVID-19 pandemic, as well as the capacity of domestic tourism to kick-start South Africa's tourism industry. In total, 350 online questionnaires were completed after the data collection period.

The characteristics of the tested sample are presented in Table 1.

The collected data were analysed using the IBM Statistical Package for Social Sciences [SPSS] software with the aid of a statistician.

4. Results and discussion

4.1. Travel patterns and behaviours

In order for the domestic tourism sector to be able to cater for the needs and preferences of the domestic consumers, they must be well understood, especially taking into account changes that have taken place between the time before and after the pandemic. Key factors in this respect include the frequency of domes-

Table 1. Socio-demographic profiles of respondents ($n = 350$, in %)

Characteristics	Category	Percentage of total
Gender	Female	70
	Male	30
Age	18-24	65
	25-34	31
	35-44	3
	45-54	0
	55-64	1
	65 or older	0
Highest qualification	Undergraduate degree	37
	Postgraduate degree (honours*, Masters, PhD)	32
	High school leaving certificate	16
	Post high school professional certificate	15
Occupation	Student	50
	Employed full time	27
	Unemployed	15
	Employed part time	7
	Self-employed	1
Province of residence	Gauteng	71
	Northern Cape	1
	Free State	1
	Eastern Cape	4
	North West	3
	Limpopo	4
	Western Cape	8
	Mpumalanga	4
	Kwa-Zulu Natal	4

* In South Africa the bachelor honours degree is a postgraduate degree that follows on from the completion of a bachelor's degree.

Source: own elaboration.

tic travel, travel motivations, preferred destinations (provinces) and the typical length of stay. At the start of the questionnaire, respondents were asked about their perception of affordability of domestic tourism in South Africa. For 62% of them, domestic tourism products were affordable, while 38% regarded them as very expensive. The following close-ended question concerned respondents' travel patterns and behaviours in the period between 2019 and 2020, with 5 options representing different frequency of travel in a year: once a year, 2-3 times a year, 4-7 times a year, 8 or more times a year and "other". In the next closed-ended question, respondents were asked to select specific reasons why they did not travel in 2019.

44% of respondents indicated that they travelled 2 or 3 times in 2019, which is not surprising given that the majority of the respondents (85%) were either

students or were employed, which meant they could only travel during holidays or on their off days. 28% of respondents reported they travelled only once in 2019. As many as 38% of respondents indicated that did not travel in 2019 because domestic tourism products and services were too expensive for them. Figure 1 shows the main reasons for travelling before the pandemic³ and travel motivations regarding travel plans after the pandemic.⁴

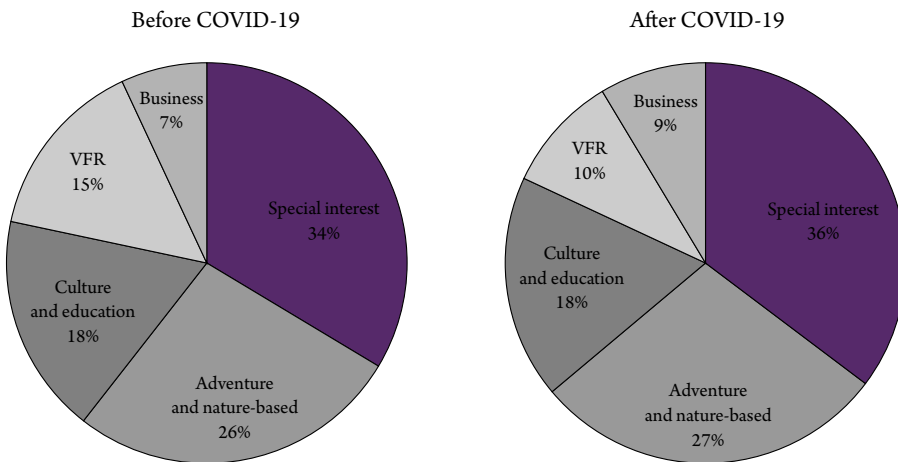


Figure 1. Reasons for travelling before March 2020 and motivations regarding travel plans after the pandemic (2021 and beyond) ($n = 350$, in %)

Source: own elaboration.

34% indicated that in 2019 they travelled in connection with their special interests. Almost the same number of respondents (35%) indicated that after the pandemic they would like to travel for special interest purposes, which might suggest a desire to travel away from their places of work and residence in order to relax and fulfil their health and spiritual needs (Pluta, 2021). Although, business travel is one of the most popular reasons for travelling in South Africa (Lekgau & Tichaawa, 2022), only 9% of respondents indicated that they would want to travel for business purposes after the pandemic, which may be the result of some businesses switching to remote work during the pandemic (Booyens et al., 2022; Lekgau & Tichaawa, 2021; Rogerson, 2021).

In another closed-ended question, respondents were asked to indicate a province (other than their own) they would like to visit after the pandemic.

³ This includes 2019 until March 2020 when the lockdown started and no travel was allowed.

⁴ This covers the period from the later part of 2020, once the lockdown had been lifted, through 2021 and onwards.

Table 2. Travel intentions and preferences ($n = 350$, in %)

Provinces that respondents intended to visit after the pandemic	Percentage of total
Western Cape	22
Mpumalanga	16
Kwa-Zulu Natal	16
Limpopo	10
Eastern Cape	10
Gauteng	9
North West	7
Free State	5
Northern Cape	5
Intended length of stay	
Less than a day	2
1-3 days	42
4-7 days	23
More than a week	4
Depends on the budget	29

Source: own elaboration.

Respondents' answers are summarised in Table 2. Three provinces turned out to be the most popular destinations for post-pandemic travel: Western Cape (22%), Mpumalanga (16%) and Kwa-Zulu Natal (16%). They are among South Africa's top visited destinations. The South African National Department of Tourism (2020) reported that in 2020 Western Cape received 25.1% of all domestic arrivals, Mpumalanga received 9.2% and Kwa-Zulu Natal received 3.3%. Being coastal provinces, Western Cape and Kwa-Zulu Natal mainly attract tourists looking for seaside holidays (Makhaola & Proches, 2017). As for the province of Mpumalanga, it is the most conveniently located holiday destination for residents of the Gauteng province, the wealthiest in the country, which most respondents were from.

Due to high levels of unemployment in South Africa, most people have not been able to afford domestic tourism services, since they are mainly targeted at international tourists (Henama & Sifolo, 2018; Lekgau et al., 2021; Rogerson, 2015). According to Statistics South Africa (2022), the national unemployment rate was at 34.5% in the first quarter of 2022, with 42.1% of people aged 25-34 being out of work. In another closed-ended question, respondents were asked to select reasons why they would not travel. As noted above, more than a third of respondents (38%) thought that tourism products and services in South Africa were unaffordable. When they were asked to indicate their intended length of stay during a domestic holiday, 42% of the respondents chose the option "1-3 days."

29% of respondents answered that the intended length of stay would depend on their budget, which demonstrates that marketing campaigns, such as those mentioned earlier, are really needed to revive the domestic tourism market in the absence of international tourists.

4.2. Opinions, attitudes and plans regarding domestic tourism in South Africa

To find out what respondents thought about domestic tourism in South Africa and what were their plans in this regard, they were asked to indicate their agreement or disagreement with nine statements listed in Table 3 on a 5-point Likert scale, with options ranging from “strongly agree” (SA-5), “neutral” (3), to “strongly disagree” (SD-1).

Table 3. Opinions and attitudes regarding domestic tourism in South Africa ($n = 350$, in %)

Statements	SD	D	N	A	SA	Mean	Std. Dev.
1. I am planning to travel to other provinces in the near future	4	5	10	29	52	4.19	1.08
2. I would promote South Africa as a tourist destination in order to help the tourism industry recover.	3	3	15	30	49	4.19	1.00
3. I encourage friends and family to consider travelling domestically once the lockdown is lifted.	3	5	16	34	42	4.08	1.00
4. I am willing to travel to other provinces once travel restrictions are lifted.	3	8	12	38	39	4.02	1.05
5. I say good things about South African destinations on social media.	3	5	26	32	34	3.88	1.04
6. I think people are likely to travel to local destinations and not very far away because of COVID-19.	5	6	21	38	30	3.81	1.08
7. I would rate my likelihood of travelling to other provinces in the next few months quite high.	6	12	16	30	36	3.78	1.21
8. I think the tourism industry will quickly recover from the COVID-19 pandemic	8	23	26	22	21	3.24	1.25
9. The local tourism industry will benefit from the COVID-19 restrictions.	26	24	25	12	13	2.61	1.33

Source: own elaboration.

5. Conclusion and discussion

There is general agreement that domestic tourism in South Africa needs to be strengthened, as evidenced by the marketing campaigns mentioned earlier. However, it seems these efforts and the amount of investments have not been sufficient to ensure that the sector can effectively serve its purpose. The situation became particularly evident during the COVID-19 pandemic, when the inflow of international tourists was limited and it was clear that the domestic tourism market could offset some of the losses incurred as a result of this decline.

The study's findings show that South Africans are willing to take advantage of what domestic tourism offers. However, to make sure this willingness leads to actual purchasing decisions, a number of challenges need to be addressed and overcome. Firstly, there is a need to raise awareness about tourism in South Africa because a lot of people are not aware of the part they play in the tourism value-chain; although many of them frequently travel to visit friends or relatives and as part of religious practices, they do not regard themselves as tourists (Acha-Anyi, 2018; Barnes & Rogerson, 2021; Dube-Xaba, 2021; Musavengane et al., 2022; Proos & Hattingh, 2022; Rogerson & Rogerson, 2022c). Additionally, the marketing of lesser-known local destinations should become a priority for the government, especially in view of the fact that the country's traditional tourist destinations are too expensive for the average resident. The COVID-19 pandemic has provided a valuable lesson about the importance of investing in domestic tourism and decreasing the industry's dependence on foreign tourists, which is susceptible to external shocks and cannot always be relied on.

6. Limitations of the study

Firstly, the study was based on data collected from a self-selected sample of respondents who had social media profiles, which was not representative of the population of potential tourists living in South Africa. Moreover, the data were collected when COVID-19 was still a major concern in the country and lockdown restrictions were in place.

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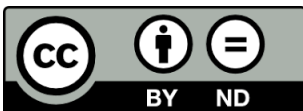
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Wykorzystanie potencjału turystyki krajowej w niepewnych czasach: wnioski z okresu pandemii COVID-19 w RPA

Streszczenie. Artykuł ma na celu podkreślenie roli turystyki krajowej w ożywieniu branży turystycznej w RPA w niepewnych czasach na przykładzie pandemii COVID-19. Autorzy argumentują, że turystyka krajowa powinna być promowana jako sposób na rekompensowanie strat poniesionych w przypadku osłabienia turystyki międzynarodowej. W związku z tym przeprowadzono ankietę internetową, aby ocenić postrzeganie i wykorzystanie turystyki krajowej w RPA. W ankiecie wzięło udział 350 respondentów mieszkających w Republice Południowej Afryki, którzy udzieli informacji o swojej aktywności turystycznej w 2019 i 2020 r. oraz planowanej aktywności w okresie po pandemii (2021 i później). Autorzy uważają, że turystyka krajowa może stymulować rozwój turystyki w niepewnych czasach po ostatniej pandemii, ponieważ większość respondentów wyraziła chęć częstszego korzystania z krajowej i lokalnej oferty turystycznej w okresie po pandemii. Podkreślali jednak potrzebę obniżenia cen w celu zwiększenia dostępności krajowej oferty turystycznej w czasach wstrząsów zewnętrznych.

Słowa kluczowe: turystyka krajowa, RPA, COVID-19, zarządzanie turystyką, zrównoważony rozwój



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