



Tourism Industry Survey of South Africa: COVID-19

Reopening

DECEMBER 2020: SURVEY 3



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA



TBCSA
TOURISM BUSINESS COUNCIL OF SOUTH AFRICA



IFC

**International
Finance Corporation**
WORLD BANK GROUP

Foreword

This survey, which is a collaboration between IFC, Department of Tourism, and TBCSA and all its member associations, is the last of three and assists all the relevant tourism stakeholders to gauge the depth of the crisis in the tourism sector of our country. The results of the surveys provide important additional data to the collaborative work that is currently underway between government and the private sector towards reopening the tourism sector, in the context of the risk-adjusted approach adopted by our government. Every bit of information is vital for us in our attempt to manage the delicate balance between protecting livelihoods and the economy on the one hand, and protecting people's health on the other.

Leaders and economists across the globe have largely admitted that the COVID-19 crisis will leave the global economy in a state not seen since the Great Depression of 1929. Undoubtedly, the tourism sector, internationally and locally, has been the biggest casualty of the current crisis. We are still uncertain about the full impact of COVID-19 on the tourism sector, but also, more worryingly, about how long the crisis will take to go away, if at all. The United Nations Conference on Trade and Development (UNCTAD) has listed our country as one of the top 15 countries that is being negatively impacted by the near-closure of the international travel industry during the pandemic. The survey results are indeed an indication that the COVID-19 crisis has already significantly devastated the supply side of the tourism sector as a result of the demand collapse in our country.

It is too early to proclaim that the worst is over because much is still unknown. Even in parts of the world where it seemed they had brought the pandemic under control, uncertainty still lingers. Our task, however, government and business, is to continue to closely work together to prepare for recovery of the sector. This too shall pass!



I would like to thank the 480 respondents who, in the midst of the worst crisis, took time to complete the survey. Let me also thank Tourism Department officials, TBCSA and IFC for this collaborative effort in administering this survey.

A stylized, handwritten signature in black ink.

Mmamoloko Kubayi-Ngubane, MP
Minister of Tourism

Highlights

- 98% of responding businesses are affected by COVID-19.
- Businesses are marginally less optimistic now than in June, with 24% feeling neutral or positive about the future of tourism in this country. However, 65% (compared to 67% in June) still believe their business will survive and take part in the recovery.
- Many more businesses are now open, with just 23% of businesses still closed but planning to reopen, compared to 61% in June. 5% of businesses indicate they are closed and will not reopen – an increase from 3% recorded in June. The most significant concern for businesses considering reopening is sufficient demand to break-even, followed by sufficient demand to make a profit.
- Revenues appear to be recovering slightly, with 92% of businesses (95% in May) reporting revenues in October 2020 are down more than 50% compared to October 2019, and 36% of businesses say revenues are 100% less. This is a significant improvement from the previous survey, where 75% of businesses said revenues were 100% less.
- 58% of businesses were unable to service their debts and 61% of businesses were unable to cover fixed costs in October 2020, showing a small improvement on June figures.
- The most common mitigation measure regarding workforce management remains wage reduction – as it was during the last survey, and it has increased to include 58% of businesses with more than half their workforce on reduced wages (up from 55% in May). The number of businesses employing furlough measures has decreased, while the proportion of businesses making redundancies has grown. 33% of businesses, however, have not made any redundancies.
- Medium businesses are the most affected in terms of wage reduction (77% have reduced wages for more than half their workforce), and proportionally more large businesses have made more than half their staff redundant – at 44% compared to the sector average of 18%.
- Mitigation measures applied by businesses appear to have shifted from temporary closure, refunds and supporting booking deferment, to more forward-looking strategic interventions that include adjusting marketing strategies and dropping prices.
- In a similar pattern to the results from previous surveys, all businesses prioritized the need for financial support for recovery, cashflow and tax relief. In this survey, support to commercial debt repayment climbed higher and the previous priority for advice on health and safety measures dropped to last place.
- The support facilities with the most respondent awareness are the UIF scheme and the Tourism Relief Fund of the Department of Tourism. There has been strong uptake for all facilities, and success rates and public perception has improved dramatically since the first survey in April.



October Respondent Profile Summary

- 480 total respondents.
- 98% of businesses state they are affected by COVID-19. Of those affected:
 - 56% are micro with 1 - 10 employees.
 - 39% have an annual turnover of R0 - 3m.
 - 43% are accommodation providers, 28% are tour operators, and 8% are activity or experience providers.
 - 67% of businesses are 10 years or older.

June Respondent Profile Summary

- 1501 total respondents.
- 99% are affected by COVID-19. Of those affected:
 - 65% are micro with 1 - 10 employees.
 - 53% have an annual turnover of R0 - 3m.
 - 59% are accommodation providers, 16% are tour operators, and 9% are activity or experience providers.
 - 60% of businesses are 10 years or older.

April Respondent Profile Summary

- 1610 total respondents.
- 99% are affected by COVID-19. Of those affected:
 - 66% are micro with 1 - 10 employees.
 - 52% have an annual turnover of R0 - 3m.
 - 46% are accommodation providers, 20% are tour operators, and the rest split between activity providers, Meetings, Incentives, Conventions and Exhibitions (MICE), conservancy-related, community-based, transport and other.
 - 62% of businesses are 10 years or older.

Results

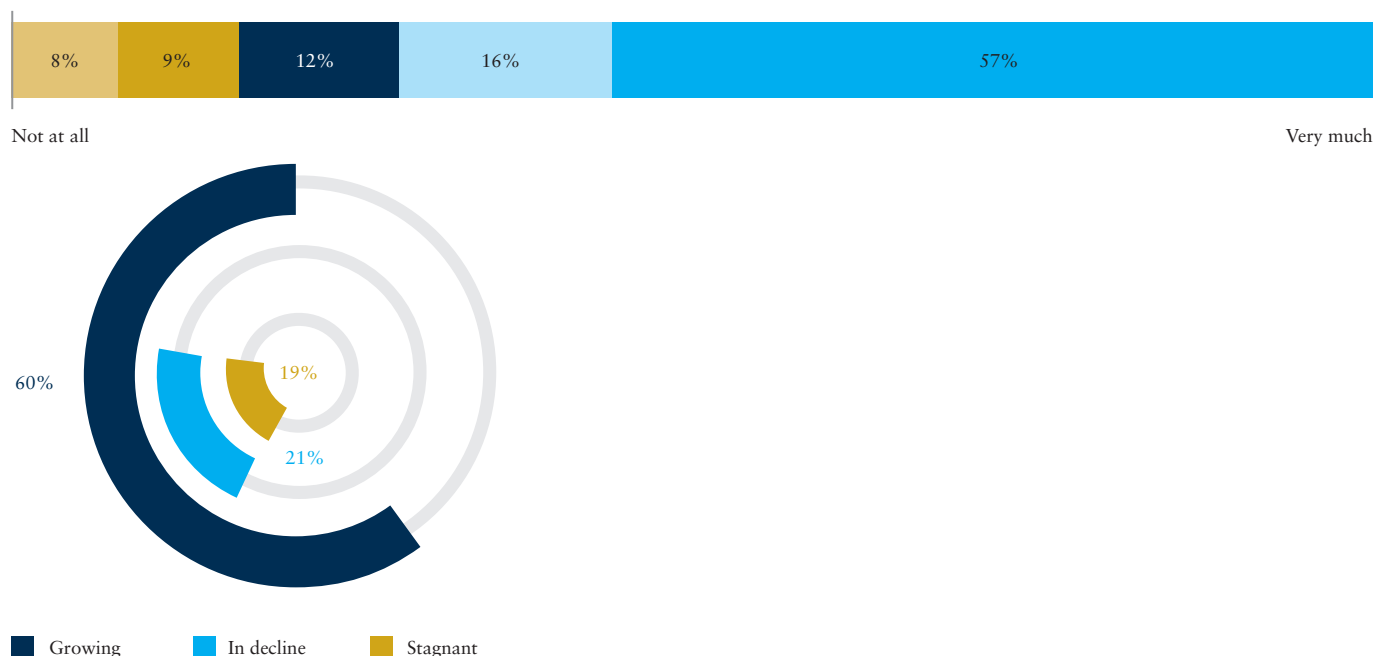
Overview

Before COVID-19, in February 2020, businesses recollect that the performance and optimism around the South African tourism economy was relatively positive. 60% of responding businesses claim they were growing, with a further 19% performing at a constant level. Most businesses felt either neutral or positive about the future of their business and tourism in South Africa.

After ten months of feeling the impact of COVID-19, 98% of businesses report they are affected by the pandemic. 24% feel neutral or positive about the future, down from 29% in June and 23% in April.

BEFORE COVID-19

85% felt neutral or optimistic about their business and the future of tourism in SA, compared to 82% in June and 79% in April, suggesting an increasingly optimistic recollection of pre-pandemic conditions.



NOW IN OCTOBER 2020

23% feel neutral or optimistic about their business and the future of tourism in SA, down from 29% in June and comparable to earlier sentiments recorded in April.



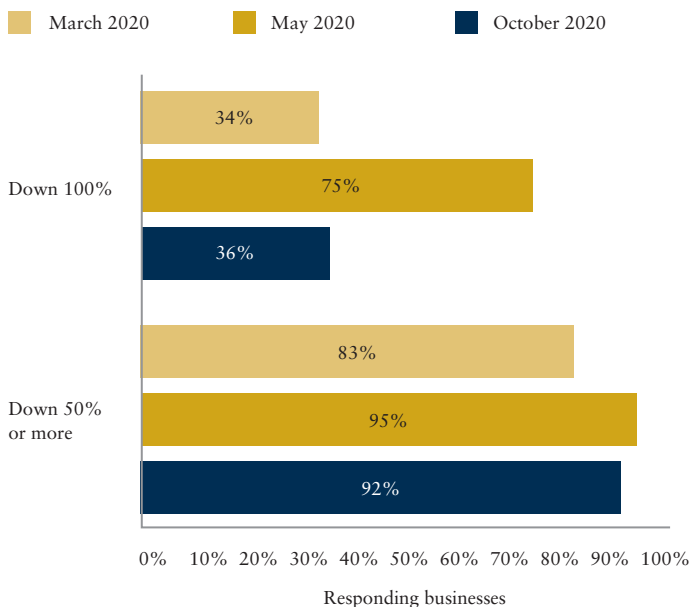
65% feel neutral or positively believe their business will survive to take part in the recovery, only slightly down from 67% in June and 64% in April.



Business impact of COVID-19

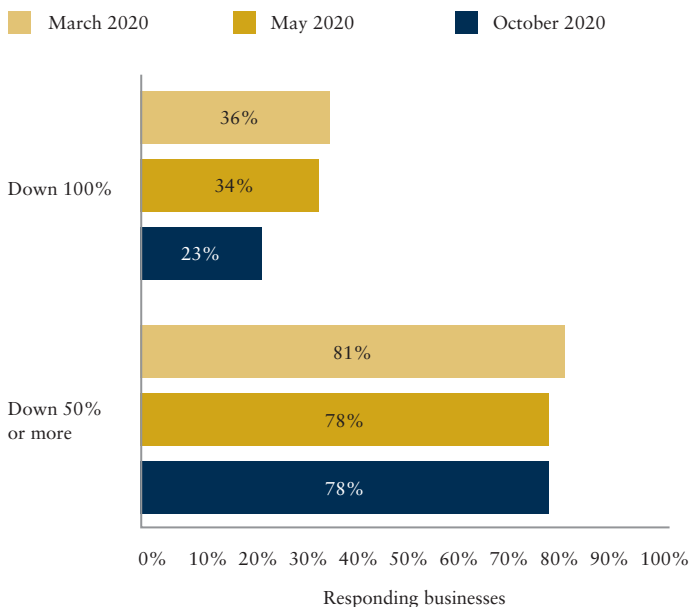
REVENUE

92% of businesses (95% in May) report revenues in October 2020 are down more than 50% compared to October 2019, and 36% of businesses say revenues are 100% less. This is a significant improvement from the previous survey, where 75% of businesses said revenues were 100% less.



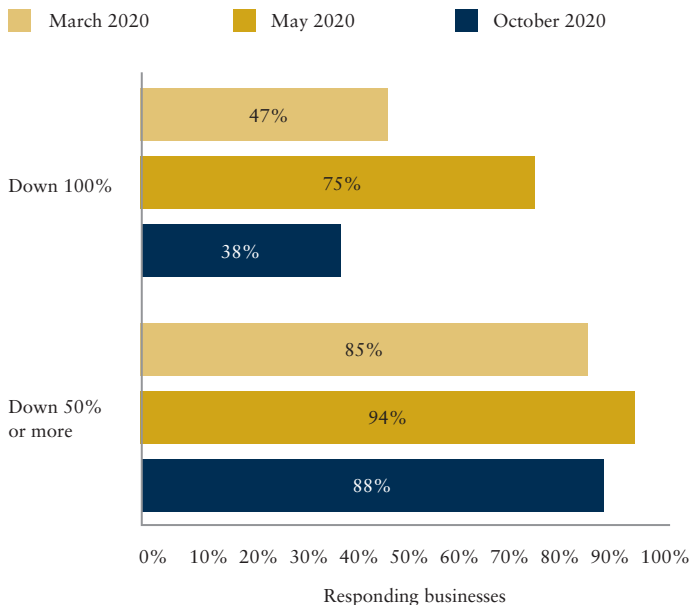
FORWARD BOOKINGS

78% of businesses (also 78% in May) report forward bookings held in October 2020 are at least 50% less than bookings held in October 2019, and 23% hold 100% fewer bookings compared to 34% in the previous survey.



OCCUPANCY/CUSTOMER USE

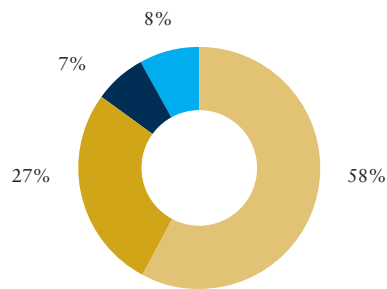
88% of businesses (94% in May) say occupancy in October 2020 is down more than 50% compared to October 2019, and 38% say occupancies are 100% less. This is a significant improvement on the previous survey, where 75% of businesses said occupancies were 100% less.



DEBT SERVICE

58% of businesses were unable to service their debts in October 2020, compared to 64% in May.

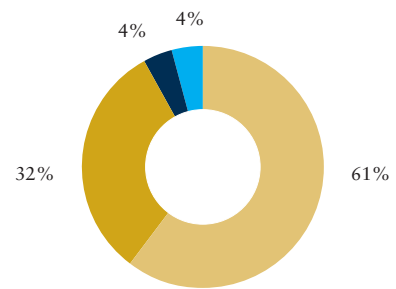
■ No ■ I don't know
■ Yes ■ Not applicable



FIXED COSTS

61% of businesses were unable to cover fixed costs in October 2020, compared to 67% in May.

■ No ■ I don't know
■ Yes ■ Not applicable



Business impact: Insights

SIZE OF BUSINESS

Small and medium businesses were slightly more affected in terms of loss of revenue.

| | | Micro | Small | Medium | Large | Total |
|---------------------------------------------------------------------|--------------|-------|-------|--------|-------|-------|
| % of businesses with more than 50% revenue decline | March 2020 | 83% | 83% | 76% | 80% | 83% |
| | May 2020 | 95% | 96% | 97% | 98% | 95% |
| | October 2020 | 92% | 93% | 94% | 81% | 92% |
| Average (mean) percentage revenue decline in 2020, compared to 2019 | March 2020 | -72% | -70% | -63% | -62% | -71% |
| | May 2020 | -91% | -92% | -94% | -93% | -92% |
| | October 2020 | -81% | -84% | -79% | -72% | -81% |

SUB-SECTOR

In October, tour operators and conservancies experienced the highest revenue declines year-on-year. F&B has seen the most significant recovery – now experiencing just a 15% average decline compared to 76% in May. Conservancies and transport are holding the least forward bookings as a percentage of last year's, followed by accommodation.

| | | Accommodation | Activity/ experience | Community- based | Conservancy/ protected area | F&B | MICE | Tour operator | Transport | Other | Total |
|---------------------------------------------------------------------|--------------|---------------|-------------------------|---------------------|--------------------------------|------|------|------------------|-----------|-------|-------|
| Average (mean) percentage revenue decline in 2020, compared to 2019 | March 2020 | -66% | -80% | -76% | -87% | N/A | -83% | -74% | -69% | -73% | -71% |
| | May 2020 | -93% | -95% | -63% | -81% | -76% | -94% | -95% | -94% | -92% | -92% |
| | October 2020 | -72% | -85% | -53% | -93% | -15% | -84% | -94% | -81% | -88% | -81% |
| Average (mean) forward bookings decline in 2020, compared to 2019 | March 2020 | -72% | -71% | -83% | -73% | N/A | -70% | -66% | -73% | -69% | -70% |
| | May 2020 | -70% | -72% | -64% | -62% | -67% | -61% | -63% | -79% | -70% | -69% |
| | October 2020 | -70% | -66% | -47% | -97% | -38% | -62% | -67% | -83% | -60% | -68% |

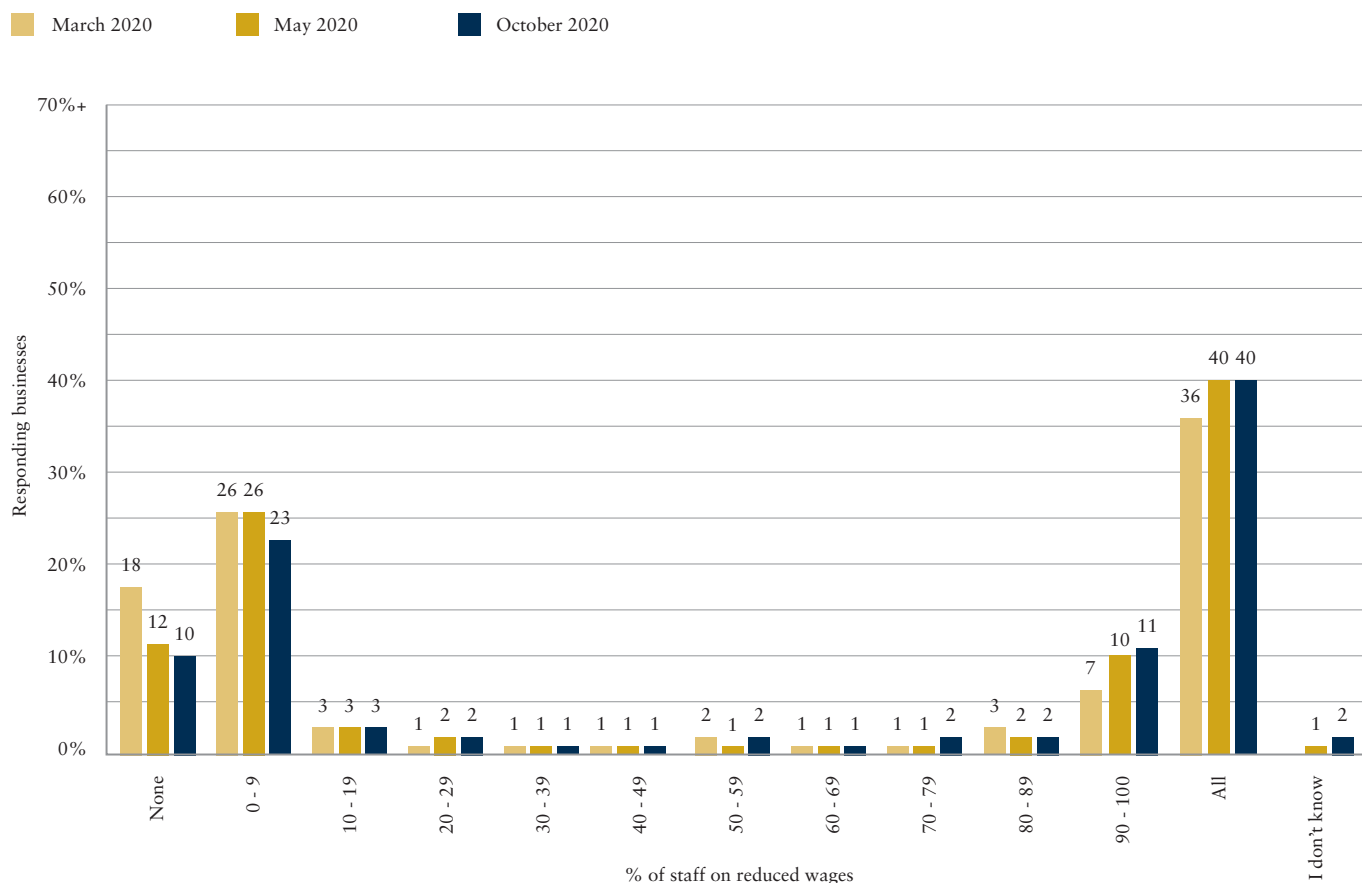
Mitigation measures

Employment measures

The most common mitigation measure regarding workforce management remains wage reduction – as it has been for all previous surveys, and it has increased to include 58% of businesses with more than half their workforce on reduced wages. The number of businesses employing furlough measures has dropped, and redundancies have seen an increase across the board.

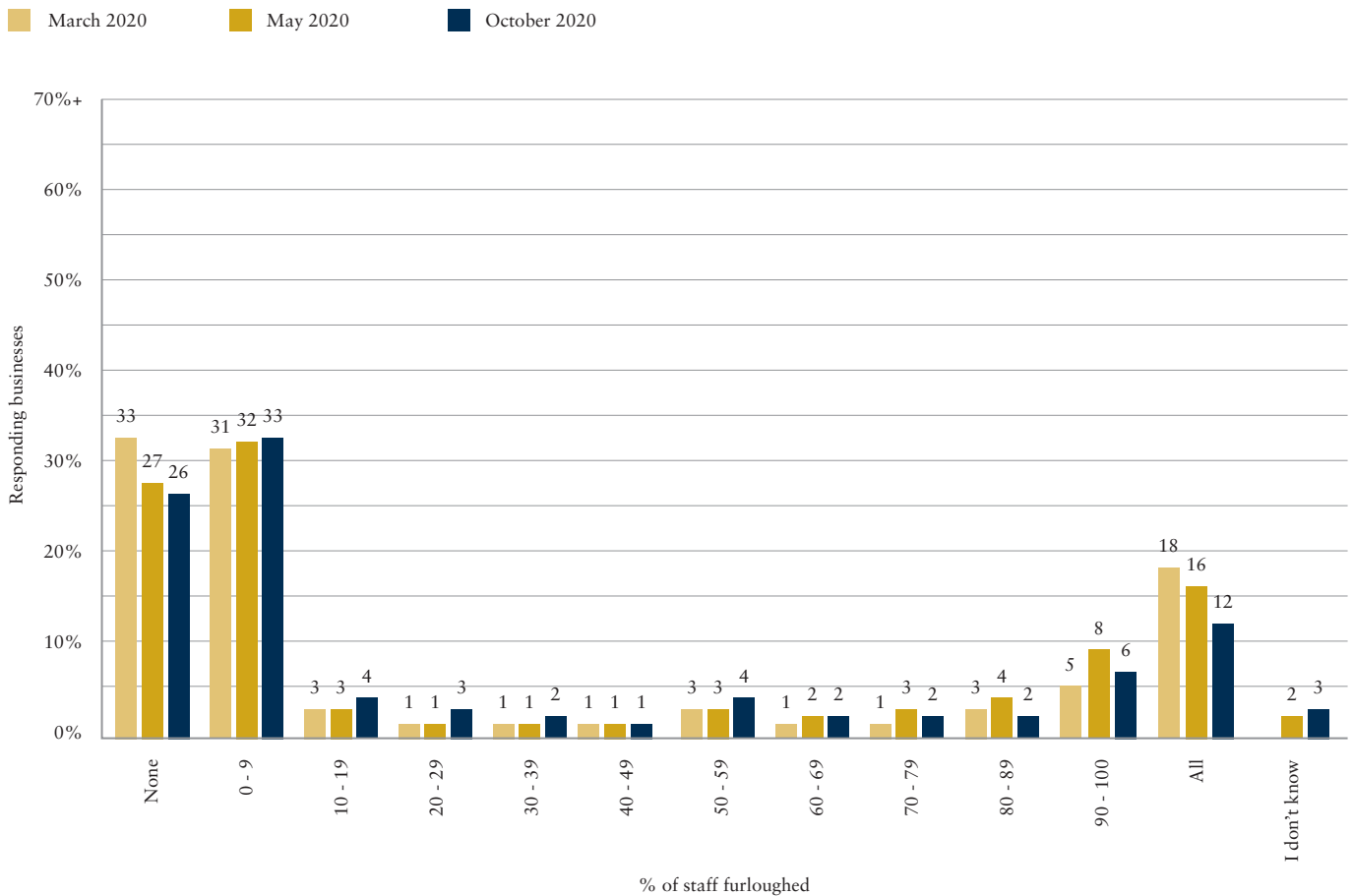
REDUCED WAGES

Reductions in wages have increased since the previous surveyed month of May. Currently 58% of businesses (55% in May) have reduced wages for more than 50% of staff, with 40% (also 40% in May) of businesses having reduced wages for all staff.



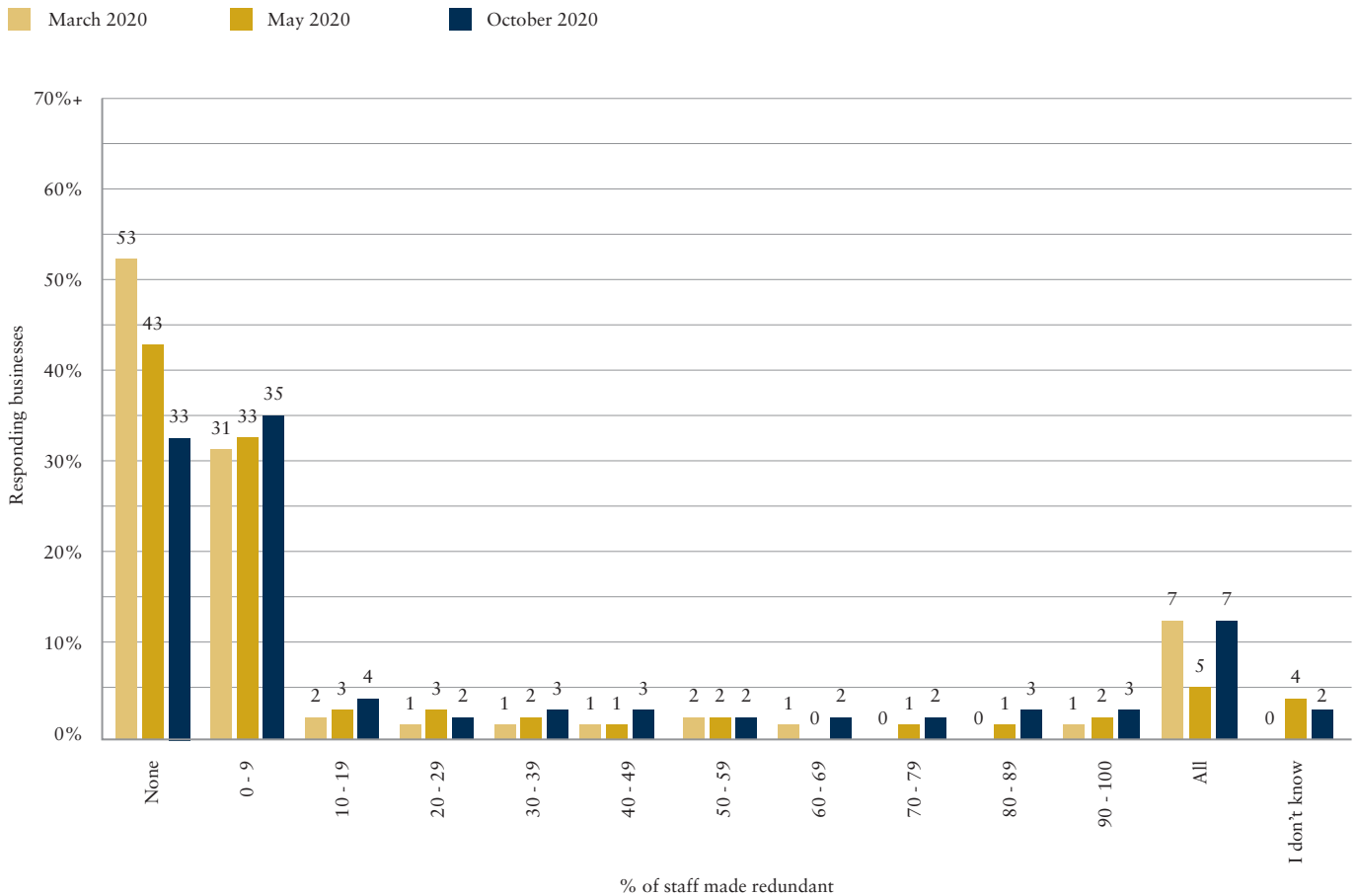
FURLOUGHED STAFF

The proportion of businesses to have furloughed staff since the previous survey has dropped, with a reduction in the number of businesses that have furloughed all staff. 28% of businesses (34% in May) have furloughed more than 50% of staff, and 12% of businesses have furloughed all staff, compared to 16% in May. 26% have not put any staff on furlough, a similar figure to the previous survey – and 33% of businesses have only furloughed less than 10% of staff.



REDUNDANCIES

The numbers of businesses making most of their staff redundant appears to have increased. 18% of businesses (11% in May) have made more than 50% of staff redundant, and 7% of businesses (5% in May) made all staff redundant. 33% have not made any redundancies - compared to 43% in the previous survey.



Mitigation measures: Employment measures insights

SIZE OF BUSINESS

The table below shows the percentage of each size of business that has introduced these measures to more than 50% of staff. As with the previous survey, there is evidence of greater impact on workforces of medium and large businesses than small and micro. Medium businesses are the most affected in terms of wage reduction followed by large businesses, and proportionally more large businesses have made more than half their staff redundant – at more than twice the sector average.

| | | Micro | Small | Medium | Large | Total |
|------------------|--------------|-------|-------|--------|-------|-------|
| Reduced wages | March 2020 | 42% | 64% | 75% | 61% | 50% |
| | May 2020 | 46% | 67% | 89% | 67% | 55% |
| | October 2020 | 49% | 65% | 77% | 74% | 58% |
| Furloughed staff | March 2020 | 27% | 38% | 38% | 26% | 32% |
| | May 2020 | 25% | 39% | 68% | 51% | 33% |
| | October 2020 | 23% | 33% | 25% | 33% | 28% |
| Redundancies | March 2020 | 11% | 31% | 12% | 4% | 11% |
| | May 2020 | 11% | 14% | 14% | 16% | 12% |
| | October 2020 | 18% | 17% | 13% | 44% | 18% |

SUB-SECTOR

The table below shows the percentage of each type of business that has introduced these measures to more than 50% of staff. Proportionally, tour operators and transport have been most active in reducing staff wages, with conservancies and community-based businesses furloughing staff and making redundancies. The food and beverage sector is showing the strongest levels of recovery with only 20% of businesses reporting reduced wages for more than half their staff, and registering the lowest in terms of furlough and redundancies.

| | | Accommodation | Activity/ experience | Community- based | Conservancy/ protected area | F&B | MICE | Tour operator | Transport | Other | Total |
|------------------|--------------|---------------|-------------------------|---------------------|--------------------------------|-----|------|------------------|-----------|-------|-------|
| Reduced wages | March 2020 | 52% | 37% | 13% | 77% | N/A | 57% | 52% | 47% | 50% | 50% |
| | May 2020 | 55% | 53% | 58% | 46% | 49% | 52% | 64% | 60% | 48% | 55% |
| | October 2020 | 55% | 52% | 25% | 75% | 20% | 55% | 65% | 60% | 63% | 58% |
| Furloughed staff | March 2020 | 34% | 25% | 25% | 27% | N/A | 27% | 36% | 36% | 25% | 32% |
| | May 2020 | 35% | 33% | 33% | 46% | 39% | 26% | 33% | 40% | 23% | 33% |
| | October 2020 | 24% | 35% | 50% | 100% | 0% | 6% | 34% | 26% | 22% | 28% |
| Redundancies | March 2020 | 9% | 17% | 50% | 14% | N/A | 9% | 15% | 9% | 10% | 11% |
| | May 2020 | 10% | 14% | 24% | 0% | 10% | 11% | 18% | 26% | 11% | 12% |
| | October 2020 | 13% | 16% | 50% | 50% | 0% | 6% | 28% | 27% | 17% | 18% |

Mitigation measures: Other measures

Businesses have put in place a variety of measures to help mitigate against the impacts on their business. The most commonly applied measures are ‘adjusting marketing strategies’ at 72%, ‘supporting deferment of bookings instead of cancellation’ at 70%, and ‘lowering prices’ at 69%. This compares to the top measures recorded in June as; ‘supporting deferment of bookings instead of cancellation’ at 67%, ‘providing refunds’ at 64% and ‘temporary closure’ at 57%.

In the current survey, 60% (52% in previous survey) have canceled planned investments or upgrades which will have consequences for other areas of the economy. 51% have already borrowed capital (up from 42% in June), and 34% have invested in upskilling staff (31% in June). 60% of responding businesses are still not, so far, considering permanent closure.

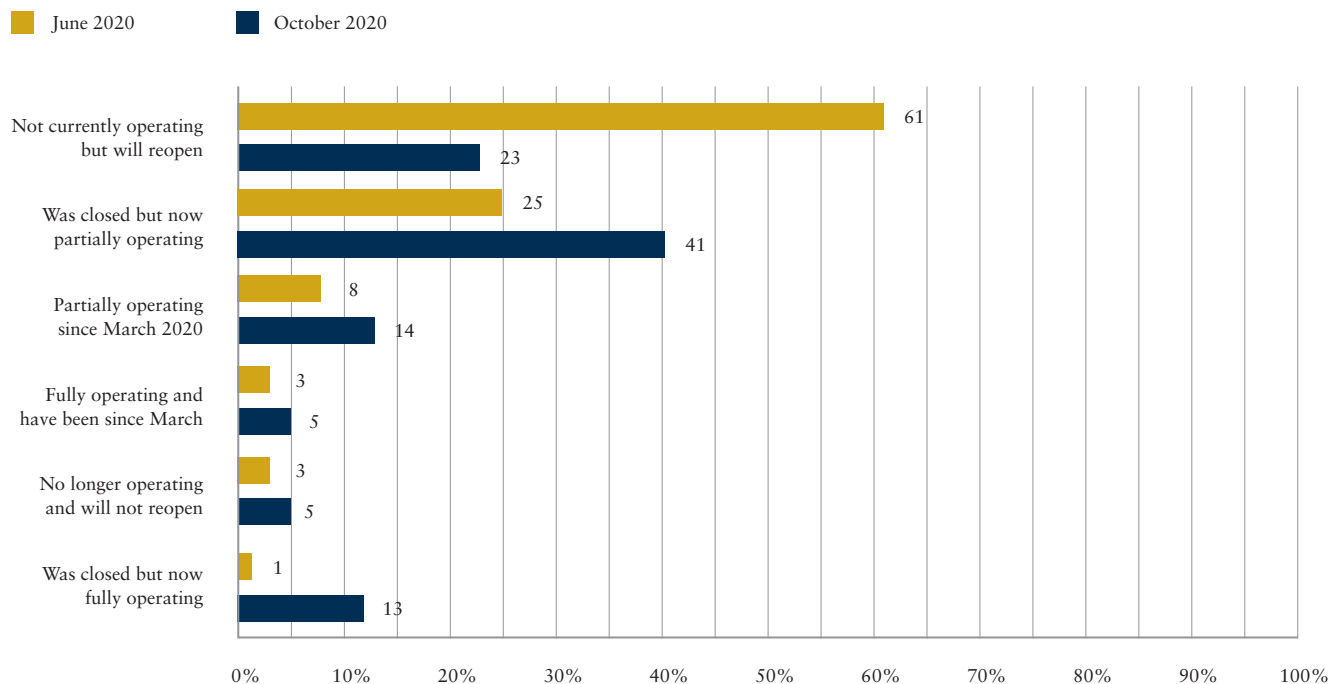
| | | Already done | Considering | Not considering | Not applicable | I don't know |
|---------------------------------------------------------|--------------|--------------|-------------|-----------------|----------------|--------------|
| Introduced vouchers | March 2020 | 18% | 23% | 18% | 33% | 8% |
| | May 2020 | 24% | 15% | 29% | 29% | 3% |
| | October 2020 | 27% | 8% | 36% | 26% | 3% |
| Introduced alternative products | March 2020 | 13% | 29% | 11% | 42% | 5% |
| | May 2020 | 23% | 24% | 18% | 34% | 2% |
| | October 2020 | 37% | 20% | 16% | 26% | 2% |
| Amended cancellations/ refund policies | March 2020 | 53% | 18% | 8% | 19% | 2% |
| | May 2020 | 55% | 15% | 10% | 19% | 1% |
| | October 2020 | 66% | 11% | 7% | 15% | 1% |
| Supported deferment instead of cancellation | March 2020 | 60% | 16% | 5% | 16% | 3% |
| | May 2020 | 67% | 12% | 5% | 15% | 1% |
| | October 2020 | 70% | 10% | 5% | 14% | 1% |
| Provided refunds | March 2020 | 54% | 13% | 11% | 19% | 3% |
| | May 2020 | 64% | 8% | 9% | 18% | 1% |
| | October 2020 | 68% | 5% | 9% | 17% | 1% |
| Offered lower prices | March 2020 | 28% | 29% | 19% | 21% | 2% |
| | May 2020 | 45% | 22% | 19% | 13% | 1% |
| | October 2020 | 69% | 13% | 11% | 7% | 1% |
| Adjusted marketing strategies | March 2020 | 36% | 45% | 5% | 12% | 3% |
| | May 2020 | 55% | 33% | 4% | 7% | 1% |
| | October 2020 | 72% | 18% | 4% | 5% | 1% |
| Borrowed capital from bank, family/friends, other | March 2020 | 25% | 36% | 24% | 12% | 3% |
| | May 2020 | 42% | 18% | 25% | 13% | 3% |
| | October 2020 | 51% | 11% | 23% | 13% | 2% |
| Upskilling staff through online courses and webinars | March 2020 | 17% | 23% | 22% | 36% | 2% |
| | May 2020 | 31% | 17% | 21% | 29% | 1% |
| | October 2020 | 34% | 15% | 23% | 26% | 1% |

| | | | | | | |
|-------------------------------------------------------------|--------------|-----|-----|-----|-----|-----|
| Investing in renovations, upgrades or business improvements | March 2020 | 13% | 19% | 46% | 21% | 1% |
| | May 2020 | 22% | 18% | 39% | 20% | 1% |
| | October 2020 | 29% | 14% | 37% | 19% | 0% |
| Canceled planned upgrades, expansions or improvements | March 2020 | 51% | 15% | 11% | 22% | 1% |
| | May 2020 | 52% | 14% | 13% | 20% | 1% |
| | October 2020 | 60% | 11% | 12% | 17% | 0% |
| Significant downscaling | March 2020 | 58% | 17% | 8% | 15% | 2% |
| | May 2020 | 49% | 17% | 14% | 18% | 2% |
| | October 2020 | 61% | 12% | 13% | 14% | 1% |
| Temporary closure | March 2020 | 69% | 10% | 14% | 6% | 2% |
| | May 2020 | 57% | 11% | 22% | 8% | 2% |
| | October 2020 | 39% | 17% | 33% | 10% | 1% |
| Permanent closure | March 2020 | 2% | 26% | 53% | 9% | 9% |
| | May 2020 | 1% | 20% | 60% | 11% | 8% |
| | October 2020 | 1% | 22% | 60% | 11% | 7% |
| Repurposed business towards a different sector | March 2020 | N/A | N/A | N/A | N/A | N/A |
| | May 2020 | 10% | 23% | 36% | 29% | 2% |
| | October 2020 | 14% | 17% | 37% | 29% | 1% |

Reopening

CURRENT STATUS

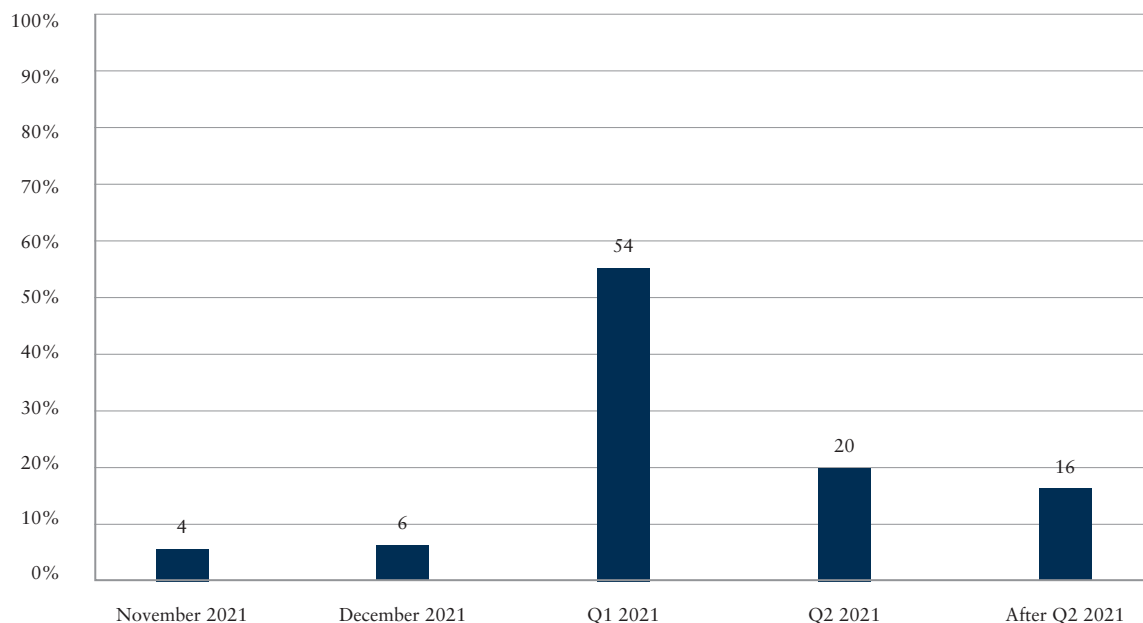
23% of responding businesses are currently not operating but plan to reopen, compared to 61% in June. 5% of businesses indicate they are closed and will not reopen – an increase on 3% recorded in June.



TIMEFRAME

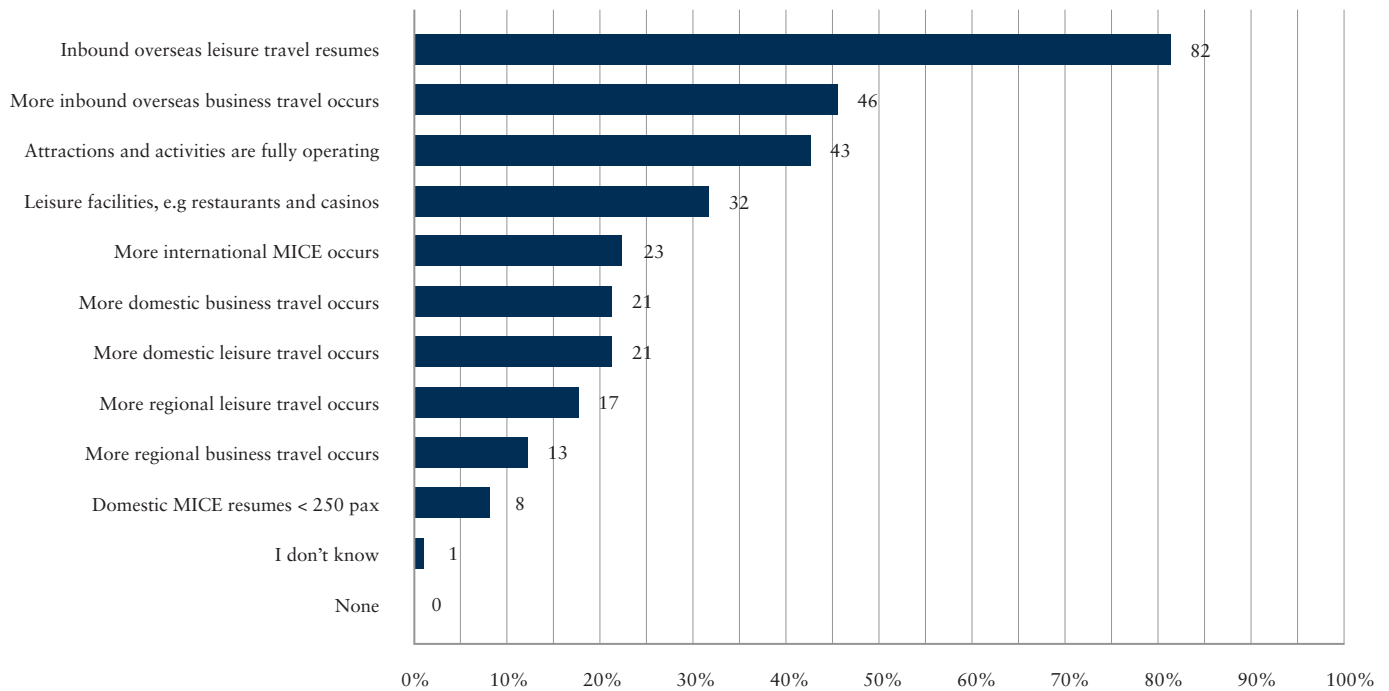
Only businesses who indicated they were temporarily closed responded to the following sections. Respondents totaled 107 businesses (23% of the total sample).

54% of non-operating respondents indicate they will reopen in Q1 2021. 78% of respondents say when they reopen it will be partial, and 22% indicate it will be in full.



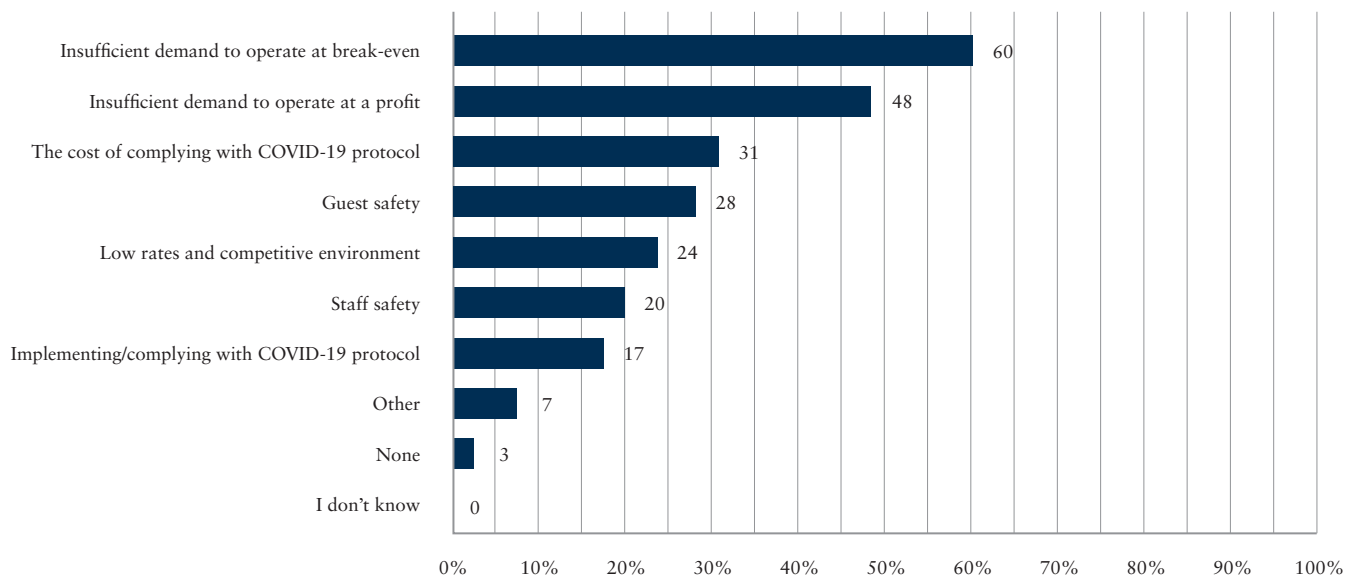
DECIDING FACTORS

The following pre-conditions to reopening have been prioritized by those businesses who remain closed. The vast majority require inbound international leisure and business travel to resume.



PRIMARY CONCERNS FOR REOPENING

61% highlight insufficient demand to break-even as their primary concern, followed by insufficient demand to make a profit – the same concerns that were prioritized in June. Respondents are immediately concerned with the market and the implications this has on the business.



Support measures

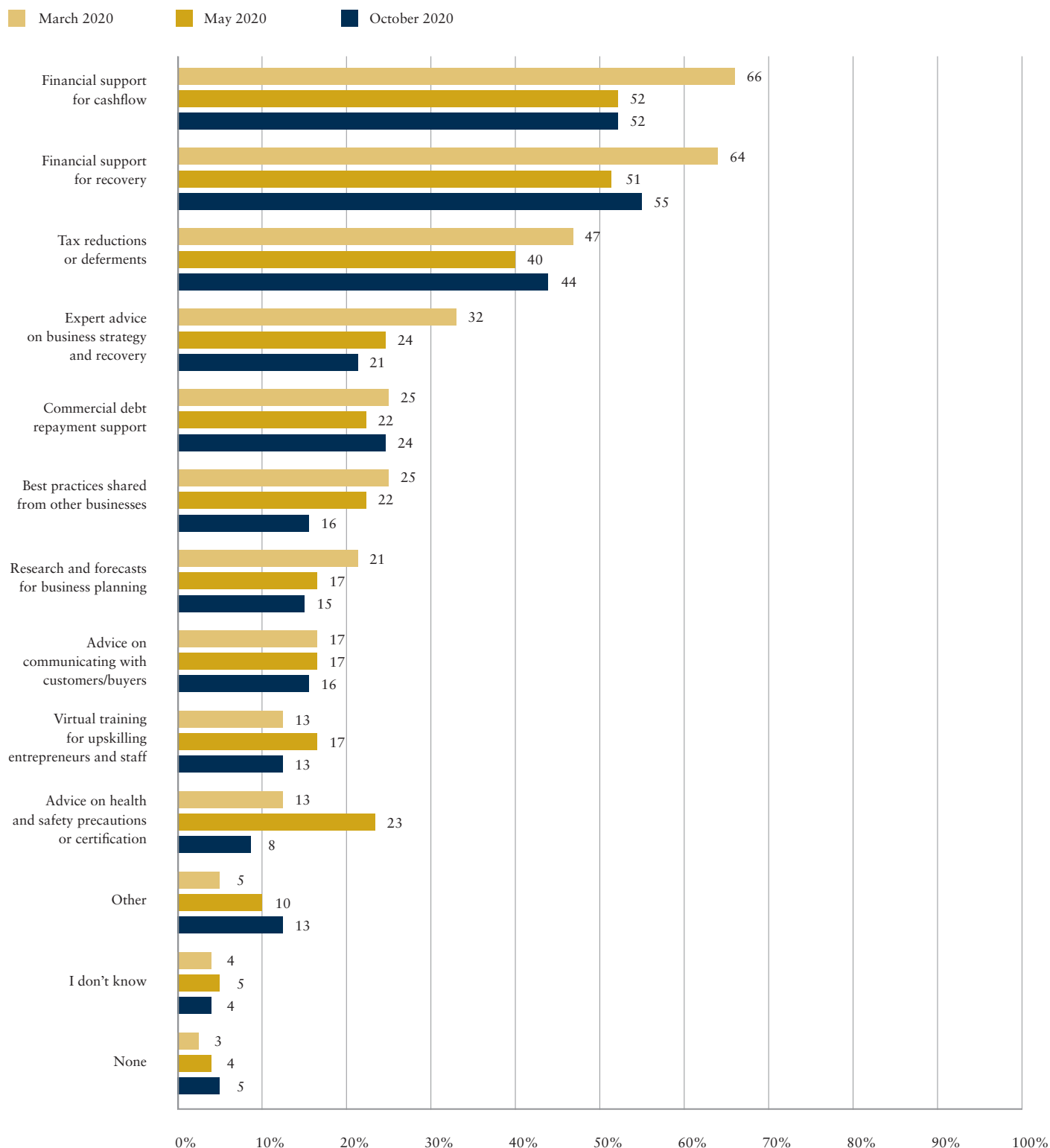
Responding businesses indicated their awareness and uptake of the following supporting mechanisms. The facilities with the most awareness are the UIF scheme and the Tourism Relief Fund of the Department of Tourism, as in previous surveys. Known eligibility is highest for the UIF scheme and there has been strong uptake for most facilities, the Solidarity Fund and IDC having the least applications. Success rates have improved for most of the schemes, especially SARS which was lagging in the previous survey, and correspondingly the perception of their value has also improved across the board.

| | | Aware | Of those aware, know eligible | Of those know eligible, applied | Of those applied, successful | Of those applied, perceive value |
|-----------------------------------|--------------|-------|-------------------------------|---------------------------------|------------------------------|----------------------------------|
| SMME Relief Fund | March 2020 | 30% | 53% | 68% | 1% | 1% |
| | May 2020 | 47% | 25% | 75% | 11% | 50% |
| | October 2020 | 61% | 20% | 57% | 20% | 75% |
| IDC Corporate Plan | March 2020 | 19% | 19% | 37% | 9% | 6% |
| | May 2020 | 27% | 13% | 49% | 8% | 50% |
| | October 2020 | 30% | 12% | 31% | 0% | N/A |
| Department of Tourism Relief Fund | March 2020 | 84% | 39% | 60% | 2% | 2% |
| | May 2020 | 89% | 41% | 89% | 32% | 81% |
| | October 2020 | 88% | 44% | 81% | 71% | 76% |
| UIF scheme | March 2020 | 96% | 67% | 69% | 5% | 3% |
| | May 2020 | 97% | 73% | 92% | 71% | 78% |
| | October 2020 | 96% | 78% | 95% | 84% | 84% |
| SARS tax subsidy | March 2020 | 63% | 49% | 35% | 12% | 7% |
| | May 2020 | 60% | 48% | 43% | 55% | 82% |
| | October 2020 | 56% | 52% | 51% | 64% | 72% |
| Solidarity Fund | March 2020 | 69% | 23% | 48% | 1% | 1% |
| | May 2020 | 74% | 22% | 13% | 6% | 89% |
| | October 2020 | 70% | 24% | 18% | 9% | 80% |
| SA Future Trust | March 2020 | 20% | 42% | 55% | 14% | 8% |
| | May 2020 | 30% | 48% | 68% | 54% | 87% |
| | October 2020 | 35% | 50% | 69% | 57% | 77% |

Needs

Businesses selected their top five outstanding needs. The five most repeated needs from all businesses in October 2020 are: financial support for recovery, liquidity (cashflow), tax relief, debt repayment support, and expert advice on business recovery.

These priority requests are the same as in April and May 2020, with the increasing rise of ‘commercial debt repayment support’ to replace ‘advice on health and safety/protocols’ which has dropped to become the least pressing requirement.



Needs: Insights

SIZE OF BUSINESS

The graphic below shows the percentage of businesses in each size category that identified their needs (five permitted). The largest proportion of micro businesses identified capital for recovery (56%), and capital for cashflow as their most pressing needs (55%). Most small businesses prioritized capital for recovery, followed by cashflow and tax relief. Most medium businesses indicated a preference for tax relief and cashflow, and large businesses had a preference for capital for recovery and tax relief.

| | | Micro | Small | Medium | Large | Total |
|------------------------------------------|--------------|-------|-------|--------|-------|-------|
| Advice on communicating with customers | March 2020 | 18% | 15% | 17% | 12% | 17% |
| | May 2020 | 19% | 14% | 10% | 22% | 17% |
| | October 2020 | 17% | 15% | 13% | 19% | 15% |
| Advice on health and safety | March 2020 | 15% | 10% | 13% | 25% | 13% |
| | May 2020 | 13% | 24% | 27% | 31% | 22% |
| | October 2020 | 7% | 5% | 17% | 15% | 8% |
| Financial support for cashflow | March 2020 | 5% | 69% | 67% | 54% | 66% |
| | May 2020 | 17% | 55% | 52% | 38% | 52% |
| | October 2020 | 52% | 51% | 42% | 41% | 50% |
| Financial support for recovery | March 2020 | 51% | 72% | 52% | 44% | 63% |
| | May 2020 | 42% | 58% | 44% | 42% | 51% |
| | October 2020 | 53% | 57% | 35% | 52% | 53% |
| Tax relief | March 2020 | 57% | 57% | 64% | 54% | 47% |
| | May 2020 | 35% | 52% | 58% | 45% | 40% |
| | October 2020 | 36% | 50% | 54% | 48% | 42% |
| Commercial debt repayment support | March 2020 | 50% | 34% | 27% | 32% | 25% |
| | May 2020 | 54% | 30% | 22% | 16% | 21% |
| | October 2020 | 24% | 41% | 17% | 11% | 23% |
| Research/forecasts for business planning | March 2020 | 42% | 18% | 27% | 23% | 20% |
| | May 2020 | 16% | 15% | 21% | 20% | 17% |
| | October 2020 | 15% | 14% | 13% | 19% | 14% |
| Best practices from other business | March 2020 | 22% | 27% | 37% | 26% | 25% |
| | May 2020 | 21% | 22% | 28% | 13% | 21% |
| | October 2020 | 17% | 11% | 17% | 5% | 15% |
| Expert advice on business recovery | March 2020 | 33% | 32% | 29% | 19% | 32% |
| | May 2020 | 24% | 25% | 23% | 13% | 24% |
| | October 2020 | 21% | 24% | 11% | 19% | 20% |
| Virtual training for upskilling | March 2020 | 14% | 12% | 12% | 11% | 13% |
| | May 2020 | 16% | 19% | 19% | 15% | 17% |
| | October 2020 | 13% | 11% | 19% | 4% | 12% |

Survey details

Methodology

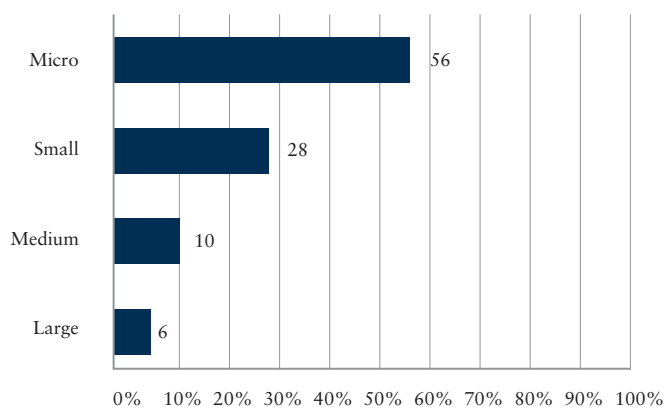
Our survey sample is made up of a wide spectrum of tourism businesses across South Africa. The survey was distributed through the networks of the Department of Tourism, and the Tourism Business Council of South Africa and all its member associations.

The questionnaire was sent out on 22nd October and closed on 12th November 2020, and was distributed electronically by email. It had five sections: general profile questions (which provide a breakdown of the type of responding businesses); questions on the business impact of COVID-19; questions on the business's response; the support measures available; and outstanding needs of the businesses.

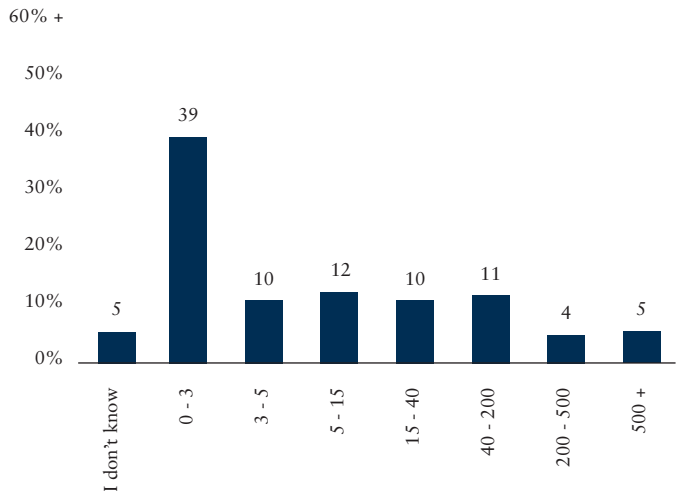
Profile of responding businesses

The survey yielded 480 responses. 3 were discounted for not knowing the size of their business, and 11 were dropped after citing 'No' to the question 'Has your business been affected by COVID-19?' 466 respondents were left and form the basis of the report. The pre-COVID profile of 466 respondents can be seen below:

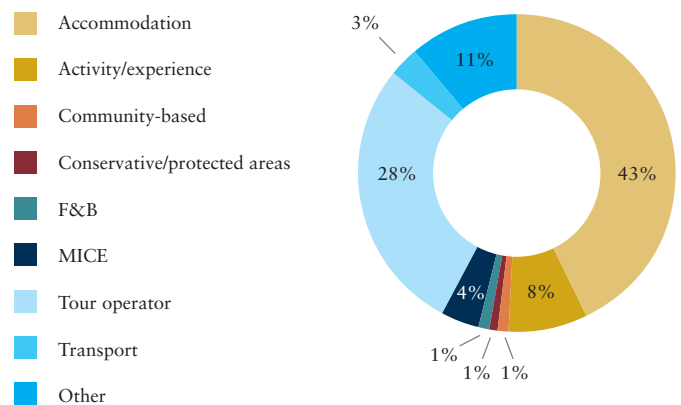
SIZE OF BUSINESS BY NUMBER OF EMPLOYEES¹



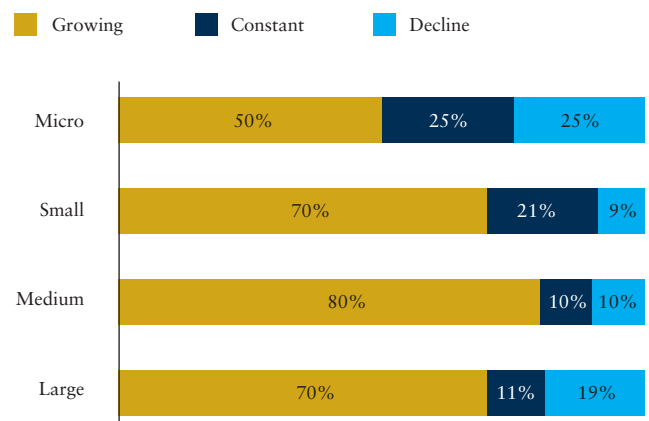
ANNUAL TURNOVER IN RANDS (MN)



TYPE OF BUSINESS



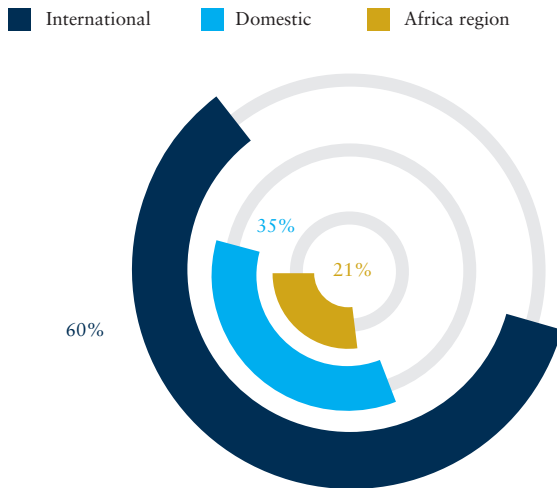
PERFORMANCE (PRE-COVID) OF BUSINESSES



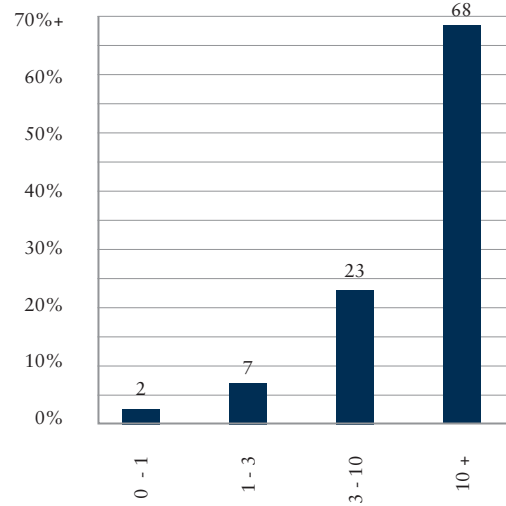
¹ Size has been determined by number of employees. 1 - 10 = micro; 11 - 50 = small; 51 - 250 = medium; 251 + = large.

MARKET FOCUS

Respondents average (mean) market share is:

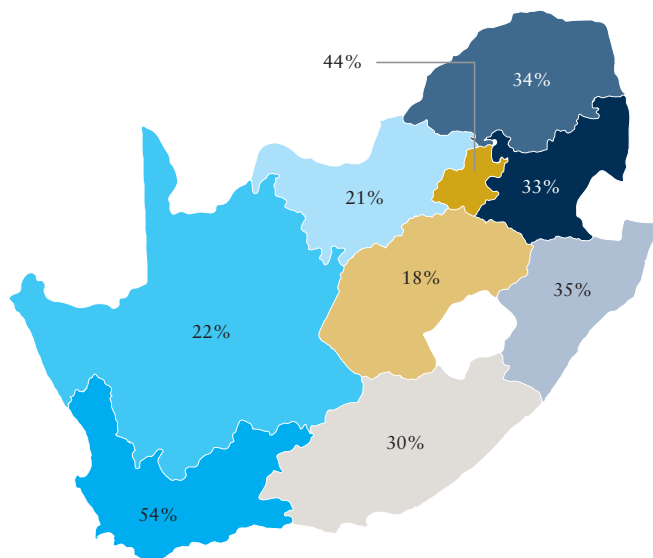


AGE OF BUSINESS IN FEBRUARY 2020



PROVINCE(S) OF OPERATIONS

Respondents indicate all the provinces (can be more than one) where they have operations. The total is therefore not 100%.





tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

