



**tourism**

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Tourism  
REPUBLIC OF SOUTH AFRICA

**Final report**

**Piloting and Refinement of the Domestic  
Tourism Recovery Framework**

**University of KwaZulu-Natal**

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## DEFINITIONS

Domestic tourism: entails residents of a country travelling in the same country for tourism purposes (see definition of tourism below)

Recovery framework: an overarching approach that provides guidelines (including strategic directions and interventions) on how to reignite and support domestic tourism to increase volumes and expenditure aimed at addressing the negative impacts of the disruptions (unplanned) and building future resilience.

Resilience: the ability/ capacity to adapt to changes as well as recover from or deal with challenges, difficulties and risks.

Sustainability: is a complex phenomenon of engaging in human activities that balances social, economic and environmental needs; without compromising the rights and needs of future generations and ensuring that negative impacts are minimised.

Tourism: “the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited” (UNWTO, cited in Statistics South Africa, 2019: 4).

Tourism service providers: includes all businesses and organisations, irrespective of size, that offer tourism experiences and services to prospective/ potential and active tourism consumers. Examples of tourism service providers include accommodation and restaurant establishments, tourism transportation services, travel agencies, tourism marketing agencies, tour operator services, tourism organisations/ associations, etc.

Transformation: refers to a change in the tourism sector that improves the ability to adapt and adjust to market demands and supply changes, as well as respond to sustainability obligations and imperatives, and technological/ digital advancements.

## Abbreviations

COVID-19	Coronavirus Disease 2019
DPME	Department of Planning, Monitoring and Evaluation
DPSIR	drivers, pressures, state, impact and response
DST	Domestic Tourism Scheme
DTRF	Domestic Tourism Recovery Framework
GDP	Gross Domestic Product
OECD	OECD
QQT	Quality, Quantity and Time
ICRT	International Centre for Responsible Tourism
ILO	International Labour Office
SEIAS	Socio-economic Impact Assessment System
SMART	specific, measurable, achievable, relevant and time-bound
SMMEs	Enabling Small, Medium and Micro Enterprises
SWOT	Strengths, Weaknesses, Opportunities and Threats
THENSA	Technological Higher Education Network South Africa
UKZN	University of KwaZulu-Natal
UNWTO	United Nations World Tourism Organisation
WEF	World Economic Forum
WTTC	World Travel and Tourism Council

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## Summary

The Department of Tourism is prioritising domestic tourism's recovery. This is linked to the consensus that promoting domestic tourism is crucial to ensure that the sector recovers from the pandemic impacts on a pathway to sustainability and resilience to deal with future disruptions. This report extends the previous study to pilot and refine the Domestic Tourism Recovery Framework proposed, incorporating the Domestic Tourism Scheme as a key component. This report provides the context of the study, stipulating the aim, objectives and research questions. In relation to the rationale and purpose of the research, the piloting and refinement of the proposed Domestic Tourism Recovery Framework are critical to guide interventions and buy-in. Furthermore, the Framework is extended to include awareness and communication, training and skills development, and monitoring and evaluation components to support effective implementation and achieve intended impacts. The research methodology adopted during this Phase was a desktop approach (updating the literature) and qualitative component (key informant interviews and focus group discussions) to facilitate engagements with purposively selected (after undertaking stakeholder mapping) and key stakeholders on the Domestic Tourism Recovery Framework and Domestic Tourism Scheme. In total, 24 key informants and 4 focus groups completed.

The proposed Domestic Tourism Recovery Framework is informed by the sustainable tourism development approach, linked to the ecosystem-based operational model that includes the drivers, pressures, state, impact and response (DPSIR) framework, which informs an examination of tourism that is based on a complex set of phenomena with multi-dimensional aspects and impacts. This approach was complemented by the Theory of Change approach during this Phase that promotes outcomes and results-based approaches to planning and development, focuses on evidence-based/ data-driven evaluation that demonstrates benefits and viability, enhances capacity development, enables partnerships and collaboration and is learning-orientated to improve future policies, plans and interventions. Several themes emerged from the literature review undertaken, including the importance of domestic tourism in South Africa and globally; trends and changes in domestic tourism travel behaviours; challenges faced in relation to finance, infrastructure, safety and security; the impacts of digital and technological advancements, and awareness levels. There was also consensus that domestic tourism was on a pathway to recovery, which needs to be supported/ incentivised. The importance of education and training as well as effective awareness and communication strategies were also highlighted.

The main findings from the key informant interviews and focus group discussions were the importance of recognising the market profiles of domestic tourists and the general population in South Africa, especially in relation to the Domestic Tourism Scheme's target groups. Several challenges were identified including financial, safety and security concerns, infrastructure and service provision, perceptions and knowledge of domestic tourism products and opportunities, seasonal fluctuations, marketing and promotion, pollution and litter/ grime, accessibility and discriminatory practices and COVID-19 pandemic and other disruptions. Key opportunities were also identified, including diverse tourism products and experiences, domestic tourism incentives, demand, location and digital/ technological changes. Very few participants were aware of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme, but there were generally high levels of support once they were made aware of these strategies. Several stakeholders were identified, including government, tourism industry associations, tourism businesses, major tourist attractions and local communities. The recovery and resilience of domestic tourism in South Africa require collaboration and cooperation among these stakeholders. The National Department of Tourism was deemed to be the lead coordinator/ champion. Several mediums of communication were identified, cautioning that targeted rather than generic approaches were required. Training and capacity development issues were also highlighted, with key areas identified, such as customer service, business support and sustainability aspects.

The proposed Domestic Tourism Recovery Framework was supported by the key informants and focus group discussions. Thus, no major changes to the proposed Framework were undertaken, although aspects were updated based on the responses from stakeholders. The four steps to reignite domestic tourism demand in South Africa (re-evaluate, reconfigure, respond and stimulate domestic tourism demand) are retained, informed by the DPSIR approach. The Framework draws on the tourism recovery strategy by encouraging a phased approach to reignite the domestic sector. The focus on Small, Medium and Micro Enterprises (SMMEs) and stimulating domestic tourism demand are highlighted.

The Domestic Tourism and Awareness Framework draws from wide-ranging consultations with key stakeholders and provides guidance on how communication within the tourism sector can align with the government's overall vision and core aims and objectives, most importantly, increasing its resilience and contribution to the country's economy. The main aspects of the Framework are setting goals and identifying stakeholder roles, setting out guiding principles, identifying and understanding audiences, message design, targeting stakeholders using appropriate communication mediums, and identifying communication barriers and mitigation measures. The Framework should be used to develop a strategy and an associated implementation plan, including an embedded awareness campaign, a framework for

monitoring and evaluation and recommendations for supporting actions. Six components for implementation are highlighted: setting goals and identifying roles (that is, establishing what the different groups involved need to do); identifying key audiences and understanding their needs/ preferences; developing key messages and testing these before using them at scale; identifying the most effective modes, methods and channels for communication of messages; and establishing ways to monitor and evaluate the impacts of the communications efforts inspired by the strategy.

In terms of skills development and training, the development of a responsive and agile training and education system is advocated. It is proposed that the conceptualisation and implementation of domestic tourism and skills development should commence with a national skills audit to identify training needs, priority needs and training capacity. Various barriers to effective training were identified, including funding/ financial constraints, quality of training, logistical challenges and awareness of training opportunities that need to be addressed.

Finally, the monitoring and evaluation indicator approach is presented, linked to the Theory of Change. The key components of this framework include championing (with the Department of Tourism identified as the main champion), communication, institutionalisation, embedding and actioning (which includes the identification of indicators in specific categories). The specific indicator categories were domestic tourists, economic impacts/ job creation, domestic tourism products and services, projects/ programmes to reignite domestic tourism, the Domestic Tourism Scheme, safety and security, funding/ investment, training, media and communication monitoring (assessing the effectiveness of the implementation of the awareness and communication approaches adopted), sustainability, organisational support, and development and implementation of sustainable domestic tourism policies/ strategies, frameworks and guidelines by tourism authorities and local governments.

## **1. Introduction and background**

The socio-economic effects of the Coronavirus Disease 2019 (COVID-19) pandemic remain despite most restrictions being uplifted in many countries. The economic uncertainty and unemployment associated with the pandemic noted by the International Labour Organisation (ILO, 2020) and concerns that attaining the United Nations Sustainable Development Goals by 2030 is unlikely (Sumner et al., 2020) remain. The tourism industry's roles in job creation and contributing to economic growth and development are well established. According to South African Tourism (2019a), domestic tourists contributed R29.5 billion in 2018/2019 globally, a growth of 35.7% over the R21.7 billion in 2017/18. The tourism industry is a key contributor to the Gross Domestic Product (GDP), with South African Tourism (2019a) indicating that prior to the COVID-19 pandemic in 2018, the World Travel and Tourism Council (WTTC) estimated that the economic impact of tourism in South Africa was R425 billion, that is, 8.6% of the total economy. The Tourism Sector Recovery Plan: COVID-19 response (Department of Tourism, 2021: 5) also underscores the importance of domestic tourism, highlighting "the need for targeted, coordinated action to mitigate the impacts of the crisis" that "sets the sector on the most optimal path to recovery, transformation and long-term sustainability". There is consensus in the literature that the recovery of domestic tourism is critical for the recovery of the tourism sector as a whole (Bama and Nyikana, 2021; Dupeyras et al., 2020; Jones, 2022; Lueck and Seeler, 2021; Matsuura and Sairo, 2022; Mensah and Boakye, 2021; Strielkowski, 2020; Woyo, 2021). It is in this context that the Department of Tourism is prioritising domestic tourism's recovery by, for example, funding research to develop a framework to reignite and ensure that the sector recovers from the pandemic impacts on a pathway to sustainability and resilience to deal with future disruptions.

## **2. Rationale of the study**

The first phase of the study developed a Domestic Tourism Recovery Framework aligned to broader intentions of the Tourism Sector Recovery Plan (Department of Tourism, 2021) and Domestic Tourism Growth Strategy: 2012-2020 (Department of Tourism, 2012) to ensure sustainable tourism development and growth. The main elements of the Domestic Tourism Growth Strategy: 2012-2020 (Department of Tourism, 2012) include the need to increase domestic tourism volumes and expenditure/ spend, address seasonality, ensure geographical spread and promote the culture of travel/ tourism among the general public. While domestic tourism will recover quicker than international tourism in South Africa, as noted earlier, several challenges are noted in the literature and the first phase, including travel hesitancy, issues



pertaining to affordability and accessibility, addressing concerns related to safety issues, the effectiveness of existing marketing and communication strategies, and responding to emerging interests and demand (Department of Tourism, 2022a). Despite these challenges, there is consensus that promoting domestic tourism to increase volumes (especially targeting untapped markets and transforming the sector to create opportunities for historically disadvantaged persons such as pensioners and those from lower income groups to travel) and expenditure is central to South Africa's tourism sector's COVID-19 pandemic recovery. The piloting and refinement of the proposed Domestic Tourism Recovery Framework are, therefore, important to ensure suitable implementation based on effective monitoring. Piloting and refining interventions designed to bring about change through ongoing monitoring and evaluation is an essential component of 'feedforward control', a mechanism for preventing problems before they occur by monitoring performance inputs and reacting to maintain the desired level.

The proposed framework development during the first phase advocated adopting the ecosystem operating model to improve strategic alignment (Selen and Ogulin, 2015) and promote sustainable competitiveness (Morant-Martínez et al., 2019). Relatedly, four steps to reignite domestic tourism demand in South Africa were outlined: re-evaluate, reconfigure, respond and stimulate domestic tourism demand. The first phase did not pilot the Framework. Thus, this phase extends the scope of the first phase and builds on the research undertaken to pilot the Framework developed and refine the Domestic Tourism Recovery Framework. Specifically, the Domestic Tourism Scheme is used as a case study as a basis for the practical application and implementation of the Framework. The Domestic Tourism Scheme, drawing on international best practices, identifies initiatives to encourage travel in South Africa (such as Sho't Left, We Do Tourism and Welcome). It is important to note that the first phase report indicates that current initiatives such as the Sho't Left Campaign, intended to anchor the country's domestic tourism campaign and encourage a culture of travel, are 'tired' approaches that need to be re-energised and re-packaged" and it is recommended that "different types of initiatives and interventions are required to target the diverse market segments" (Department of Tourism, 2022a: 124). Additionally, the challenges faced by disadvantaged and low to middle-income class segments to travel are unpacked in the Domestic Tourism Scheme to motivate for the implementation of the Domestic Tourism Scheme that is aimed at partnering with tourism value chain stakeholders to provide affordable domestic tourism holiday offerings and introducing the voucher system (discounts and/ or for goods/ services). The need for monitoring and evaluation is also highlighted.

In this context, this study provided the opportunity to engage with key stakeholders about the implementation of the Domestic Tourism Scheme in relation to promoting the recovery of domestic tourism in South Africa. We are also in a position to draw on research undertaken for the Department of

Tourism (2022b) on 'Enabling Small, Medium and Micro Enterprises (SMMEs) survival and growth during and post COVID-19', with SMMEs being key stakeholders in the South African context. Domestic tourism recovery that is resilient and responsive to future disruptions requires an innovative rethinking (building critically on current initiatives such as the Domestic Tourism Scheme) of demand and supply-side constraints to unlock potential and opportunities in the South African economy, a key focus of the proposed Domestic Tourism Recovery Framework. Piloting the Framework by using the Domestic Tourism Scheme as a case study examines practical and operational issues to support implementation.

### **3. Problem statement**

The above discussion clearly indicates that promoting domestic tourism is a key component of the tourism sector recovering from the devastating COVID-19 pandemic impacts, contributing to socio-economic recovery more generally in South Africa. The first phase outlined the Domestic Tourism Recovery Framework, drawing on a literature review undertaken and primary data collection (specifically tourism service provider and public surveys). However, the Domestic Tourism Recovery Framework was not piloted to inform implementation. Additionally, the Department of Tourism's Domestic Tourism Scheme provides an agenda and initiatives to support domestic tourism, especially targetting pensioners, youth, people living with disabilities, scholars and lower/ working class groups. Thus, the Domestic Tourism Recovery Framework needs to be piloted to ensure broader implementation that is aligned with existing initiatives such as those proposed in the Domestic Tourism Scheme.

### **4. Purpose of the study**

The purpose of the study is to pilot and refine the Domestic Tourism Recovery Framework to enhance practical application and implementation. This extension phase is also intended to provide an opportunity for the Department of Tourism to utilise the current Domestic Tourism Scheme as a case study to test the application and implementation of the Domestic Tourism Recovery Framework to reignite and stimulate domestic tourism.

## **5. Research questions**

The research questions for the study are:

- What domestic tourism recovery frameworks and strategies are emerging in other countries, and what lessons do these have for the South African context?
- How do models/ approaches to support domestic tourism in South Africa (such as the Tourism Sector Recovery Plan, Domestic Tourism Scheme, Tour Operator Framework and Framework for the Development and Support of Tourism Events) align with the Domestic Tourism Recovery Framework? What revisions are needed to ensure alignment?
- How can the Domestic Tourism Recovery Framework be applied and implemented by utilising the Domestic Tourism Scheme specifically as a case study?
- Who are the key stakeholders, and what are their interests and concerns in relation to supporting and driving the implementation of the revised Domestic Tourism Recovery Framework and Domestic Tourism Scheme?
- What are the key elements of a domestic tourism recovery communication framework to raise awareness and inform the implementation of the final Domestic Tourism Recovery Framework?
- What skills development and training are required to support the implementation of the final Domestic Tourism Recovery Framework? Who is best suited to provide the training?
- What indicators are required to monitor and evaluate the implementation of the Framework to inform the development of future initiatives (and assess the progress of activities delineated in the revised and final Framework)?
- How can the proposed Domestic Tourism Recovery Framework be refined based on the piloting to guide how domestic tourism in South Africa can be reignited as part of the sector's recovery plan?

## **6. Objectives of the study**

The main objectives of the study are to:

- Review key background documents on related models to reignite domestic tourism.
- Review and make recommendations to enhance the implementation of the Domestic Tourism Scheme.

- Conduct a pilot study to determine the practical application and implementation of the Domestic Tourism Recovery Framework by utilising the Domestic Tourism Scheme as a case study.
- Refine and produce a final Domestic Tourism Recovery Framework to guide how domestic tourism in South Africa can be reignited as part of the sector's recovery plan.
- Develop indicators required to monitor and evaluate the implementation of the Framework to inform the development of future initiatives (and assess the progress of activities delineated in the revised and final Framework).
- Identify key stakeholders and engage with them to support and drive the implementation of the revised Domestic Tourism Recovery Framework and Domestic Tourism Scheme.
- Produce a training guidelines on how to implement/ apply the final Domestic Tourism Recovery Framework.
- Conduct a workshop to capacitate stakeholders on how to implement/ apply the final Domestic Tourism Recovery Framework.
- Develop a domestic tourism recovery communication framework.
- In addition to producing training guidelines, identify skills and training aspects to support the implementation of the final Domestic Tourism Recovery Framework.

## **7. Theoretical Background (context and literature review)**

The first phase of the study indicated the importance of theoretical/ conceptual frameworks to better understand phenomena. Specifically, the development of the proposed Domestic Tourism Recovery Framework is informed by the sustainable tourism development approach, linked to the ecosystem-based operational model, which informs an examination of tourism that is based on a complex set of phenomena with multi-dimensional aspects and impacts. The tourism sector is influenced by a range of internal and external socio-economic, political and environmental. The importance of examining both demand and supply-side factors also informs the research. In addition, sustainability and resilience emerge as important considerations, given that disruptions are likely to be a regular feature globally. Travel motivation and behaviour are also significant (Croucamp and Hind, 2014; Scholtz et al., 2015), especially in the context of dramatic changes experienced during the COVID-19 pandemic. Adillón's (2019) diamond model as a theoretical framework for the sustainable development of tourism underscores the importance of examining unpredictability and responding to change, including after extraordinary events. Sustainability also includes focusing on carrying capacity and ensuring that tourism products and services

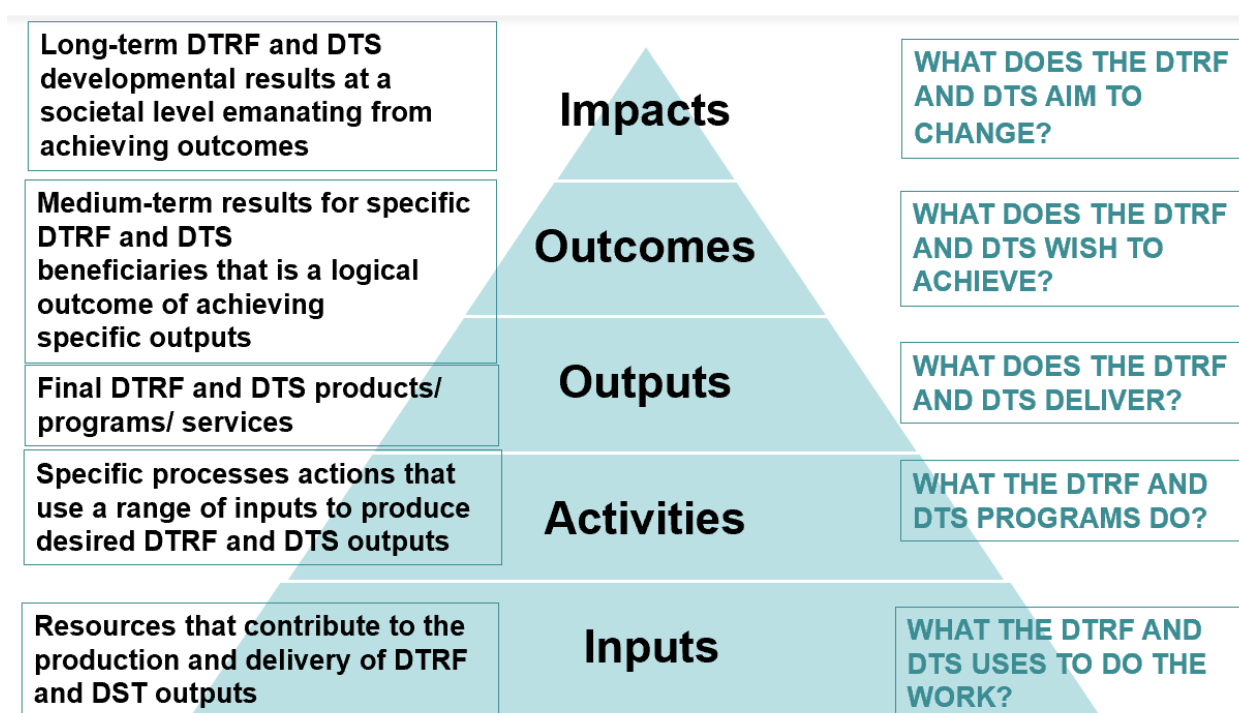
are not over-promoted as noted by Noorashid and Chin (2021). The carrying capacity assessment proposed by Adillón (2019) further includes the drivers, pressures, state, impact and response (DPSIR) framework that delineates key sustainability issues. The first phase Domestic Tourism Recovery Framework used the DPSIR framework to provide a more holistic understanding of how the domestic tourism ecosystem responds to different drivers and pressures, and can be strategically positioned to leverage positive impacts.

## **7.1. Theory of Change**

The theoretical and conceptual framework adopted during the first phase is complemented by the Theory of Change. Specifically, the monitoring and evaluation indicator approach is informed by the Theory of Change that promotes outcomes and results-based approaches to planning and development, focuses on evidence-based/ data-driven evaluation that demonstrates benefits and viability, enhances capacity development, and is learning-orientated to improve future policies, plans and interventions (Davies, 2018; Freer and Lemire, 2019; Magro et al., 2021; Murphy and Jones, 2020; Reinholz and Andrews, 2020; Twining-Ward et al., 2018; 2021). In the context of the Domestic Tourism Scheme, the Theory of Change is particularly appropriate since, as Reinholz and Andrews (2020) state, it supports the planning, implementation and assessment of projects/ programmes. Twining-Ward et al. (2018: 5) assert that the Theory of Change applies broadly to tourism because it is viewed as a development tool that can drive socio-economic change, noting that the “Theory of Change is about understanding why and how change happens and what should be planned for so that development programmes can make the most of the development potential of this sector”. Linked to the Theory of Change is the Logical Framework model that guides the development of appropriate indicators to assess progress.

The Theory of Change is advocated by the Department of Planning, Monitoring and Evaluation (DPME, 2019) and embraces a pyramid model from inputs to impacts. This approach is adapted for the Domestic Tourism Recovery Framework and Domestic Tourism Scheme as shown in the Figure below.

**Figure 1: Contextualising the Theory of Change in the monitoring and evaluation of the Domestic Tourism Recovery Framework (DTRF) and the Domestic Tourism Scheme (DST)**



The Theory of Change is a strategic approach that facilitates results-based actions by providing a logical, sequential plan for problem analysis, policy-making, and project monitoring and evaluation. Weiss (1997), decades ago, conceptualised the Theory of Change as a theory that explains why and how an initiative works or doesn't work, informing an implementation paradigm that examines how a project's goals and anticipated impacts can be realised using theoretical and evidence-based underpinnings. Essentially, a Theory of Change outlines how the activities of a specific intervention or strategy (in this case the Domestic Tourism Recovery Framework and Domestic Tourism Scheme) can result in intended impacts that can be observed and verified, linked to broader societal objectives. According to Murphy and Jones (2020), using a Theory of Change is well-established in programme evaluation as structural models that represent proposed change interventions. Similarly, Davies (2018) asserts that a Theory of Change illustrates how different elements of a system interact to generate desired outcomes. Selomane et al. (2019) note that a Theory of Change can be applied to local interventions or specific projects, applicable to the Domestic Tourism Recovery Framework and Domestic Tourism Scheme, to achieve long-term goals, such as the Tourism Recovery Strategy (Department of Tourism, 2021) and the National Development Plan. A Domestic Tourism Recovery Framework and Domestic Tourism Scheme assist in mapping out steps that need to be followed to achieve successful actions in a flexible and practical

manner, allowing for processes to be reviewed and thinking to be adapted and modified to respond to new information and changing contexts.

A Theory of Change can boost capacity development and serve as a tool to promote greater comprehension and shift mindsets. It presents a visually clear and user-friendly approach that facilitates critical reflection and promotes change that engenders collaboration, simplifying multifaceted planning procedures and objectives. Davies (2018) and Zazueta et al. (2021) suggest that the Theory of Change facilitates ongoing assessment that is guided by data and evidence, encouraging persistent learning and evaluation that guides adjustments and shapes future interventions and policy formulation. Furthermore, it supports professionalisation, transformation, and accountability.

As stated earlier, the Theory of Change underpins the monitoring and evaluation approach proposed (presented in Section 13). Monitoring and evaluation is a systematic and ongoing process of gathering, analysing, and using the information to improve decision-making and programme effectiveness. Several benefits of monitoring and evaluating tourism (applicable to domestic tourism) are identified in the limited literature that exists on this topic (Cortese et al., 2019; Kalvet et al., 2020; Matarrita-Cascante, D. 2015; Rio and Nunes, 2012; Wang et al., 2018):

- Enabling stakeholders (especially government when public funds are used) to assess and measure the impact of their domestic tourism interventions and initiatives. This assists to identify what works and what does not work, as well as what needs to be improved or changed. Monitoring and evaluation can help identify areas of success and areas that need improvement, which can be used to inform future domestic tourism strategies.
- Monitoring and evaluation is also important to identify and address issues that arise during implementation and revise/ adapt accordingly. By monitoring and evaluating the performance of various role-players, including relevant government departments and the industry, stakeholders can identify areas of weakness and take appropriate measures to address them. This is particularly important for policy and decision-makers. Revised and more appropriate interventions can improve service delivery, stakeholder satisfaction, and improved experiences for domestic tourists.
- Stakeholders can identify emerging trends in domestic tourism, including changes in consumer behaviour, new domestic products/ destinations, and shifts in demand. This can help to inform policy decisions and strategic planning for the domestic tourism sector.

- Assess whether domestic tourism (and specific activities and interventions) are transitioning to embrace sustainability/ green economy principles and practices.

## **7.2. Summary of themes emerging from Phase 1 literature review**

As indicated in the introductory section of this proposal, the report on 'Re-examining perspectives on the recovery of South Africa's domestic tourism in a COVID environment' (Department of Tourism, 2022a) noted several themes/ aspects emanating from the literature review undertaken, which include:

- The importance of the tourism sector globally (Mitchell, 2019; United Nations World Tourism Organisation - UNTWO, 2020a; 2020b; 2020c; World Economic Forum - WEF, 2020) and in South Africa specifically (South African Tourism, 2019a; 2019b).
- The importance of domestic tourism, which is the most prominent and resilient form of tourism in many countries, including South Africa (Dizdar, 2020; Foo et al., 2020; ILO, 2019; 2020; Makhaola and Proches, 2017; South African Tourism, 2019b; WTTC, 2018).
- The devastating impacts of the COVID-19 pandemic on the tourism sector are well documented (Abbas et al., 2021; Dube et al., 2020; ILO, 2020; Strielkowski, 2020), and the continued travel disruptions and unpredictability (especially at the international level) impact on the tourism sector (it will be essential to examine how the uplifting of travel restrictions and requirements recently are influencing travel trends and choices).
- The resiliency of the tourism sector to recover from shocks and recessions suggests that tourism trends will resume on an upward trajectory once the pandemic is brought under control (Cheng and Zhang, 2020; Strielkowski, 2020).
- Domestic tourism is key to ensuring that the tourism sector is more resilient to cope with future disruptions as it is repositioned on a pathway to recovery (Dupeyras et al., 2020).
- The COVID-19 pandemic crisis provides the opportunity for countries to re-evaluate tourism sector policies and strategies (UNWTO, 2020a), which in the South African context this study is part of.
- Challenges were identified for reigniting domestic tourism, including the attractiveness of tourism products, affordability and ability to pay for tourism services, tourism infrastructure and performance, and safety and security considerations (Organisation for Economic Co-operation and Development - OECD, 2020; Woyo, 2021).



- Increase in staycations (staying at home and exploring destinations/ tourists sited where or close to where one is residing) (Chesson, 2020; Hess, 2020; ILO, 2019) and virtual tourism (Aminy, 2020; Billock, 2020; Springwise, 2020; WTTC, 2020; Xiang et al., 2021).
- Focus on different types of tourism, such as rural tourism, agrotourism and wine tourism (Businesswire, 2021).
- The importance of technology and innovation in tourism (Akhtar et al., 2021; Businesswire, 2021; Kwok and Koh, 2021; Sharma et al., 2021).
- Several incentives and programmes are being conceptualised and implemented to encourage domestic tourism (Chan, 2021; Foo et al., 2020; Sanderson, 2021; UNWTO, 2020a; 2020b).

The report (Department of Tourism, 2022a) also highlighted key issues from the results of the primary (interviews with tourism service providers and the general public) data analysis:

- Understanding the tourism value chain since many tourism businesses and organisations utilise goods and services from other service providers.
- Tourism resources, products and destinations that are well established and diverse; and despite the dire COVID-19 impacts, are sufficiently ready to accommodate and provide services to tourists.
- While high levels of unemployment and poverty are key domestic tourism obstacles, a sufficient proportion of the population has disposable incomes to participate in domestic tourism activities, with a generally high proportion of the populace engaging in travel linked primarily to visiting friends and relatives.
- There are high levels of interest and willingness to travel among the South African population.
- New forms of tourism service consumption are emerging, such as staycations and virtual tourism.
- Effective targeted marketing and providing incentives/ packages to promote domestic tourism (the Domestic Tourism Scheme is important) will be critical in responding to pent-up demand and unlock the potential to encourage travel that respond to diverse travel preferences linked to socio-demographic and economic profiles.
- Impacts on tourism service providers differ related to the type of tourism activities they are involved in, number of years operational, number of employees, turnover and provincial/ geographical location since some service providers are more vulnerable to disruptions.
- There are high levels of expectation that the tourism sector will recover within five years of the pandemic being brought under control. While this indicates positive perceptions of the tourism

sector, this could be a lengthy period for some tourism businesses to survive/ financially cope without external support. Specifically, tourism service providers with lower turnovers and operating for fewer years were also more likely to anticipate a longer recovery period.

- Domestic tourism is a key vehicle to increase demand and consumption, thereby reducing negative employment impacts.
- Tourism recovery frameworks/ strategies need to address the multiple dimensional and interrelated challenges in South Africa, for example, safety and security concerns and social unrest have an impact on consumer confidence.
- High levels of support to reignite domestic tourism. However, a concern underscored is that the over-reliance on public sector support is not sustainable given that South Africa experiences funding limitations (primarily linked to a low tax base) and that funding has been prioritised to deal with the pandemic health impacts and support is geared to assist the poorest and most vulnerable in society.
- 'Localising' tourism recovery and supporting communities were deemed to be important components to drive sustainable domestic tourism recovery.

For this phase, key literature examined assessed best practices in relation to the development of domestic tourism recovery frameworks, current strategies to promote domestic tourism (including integrating the Department of Tourism's Domestic Tourism Scheme), the need for effective domestic tourism communication framework/ strategies and the monitoring and evaluation of domestic tourism trends and interventions to track progress as well as inform revisions and the development of policies and programmes/ interventions.

### **7.3. Domestic tourism recovery**

Tourism recovery is a key focus of existing and emerging literature (Abbas et al., 2021; Department of Tourism, 2021; Jones, 2022). The focus is generally on incentivising travel by offering vouchers, discounts, rebates, tax reductions, etc. There are an increasing number of academic studies that examine interventions to support domestic tourism recovery. For example, Matsuura and Sairo (2022) examine the impacts of domestic travel subsidies in Japan. Chan (2021) and Foo et al. (2020) examine Malaysia's campaign for domestic tourism, which introduced various discounts and incentives (including tax relief) to encourage people to explore their own country and restore confidence in tourism. The private sector

in South Africa has also responded with some tourism businesses engaging in product re-packaging and providing discounts to encourage domestic tourism (Sanderson, 2021). The UNWTO (2020a; 2020b) identifies strategies from different countries, including extending holidays to have long weekends, subsidising hotel accommodation for domestic tourism purposes and reducing taxes for domestic airline flights. Jones' (2022) review of the United Kingdom's post-COVID-19 tourism recovery plans illustrates the need for participative processes that involve all stakeholders, an approach used in this study as well. Some studies focus on sector-specific rather than country-level tourism-related recovery strategies and plans. For example, Raki et al. (2021) focus on the airline industry while Rodríguez-Antón and Alonso-Almeida (2020) look at the hospitality industry. As noted earlier, the Domestic Tourism Scheme is an important initiative led by the Department of Tourism that is the case study for this research.

One of the essential strategies for domestic tourism recovery is to focus on promoting destinations that offer outdoor activities, which have become increasingly popular due to the pandemic. As Rittichainuwat and Chakraborty (2023) pointed out, tourists are now seeking destinations that offer outdoor activities, including hiking, biking, and camping. Thus, destinations that can offer these activities should be marketed extensively. In this regard, leveraging technology can also aid in domestic tourism recovery. As suggested by Buhalis and Neuhofer (2023), the use of technology such as virtual reality and augmented reality can help promote destinations and provide travellers with immersive experiences. Additionally, technology can be used to facilitate contactless transactions and other safety measures.

Another strategy for domestic tourism recovery is to focus on safety and hygiene measures to ensure travellers' safety. As noted by Wyrick and Pizam (2023), tourists are more likely to visit destinations that have taken adequate safety and hygiene measures. Therefore, destinations should ensure they implement measures such as social distancing, mandatory mask-wearing, and regular sanitisation to instil confidence in travellers. In the context of South Africa, addressing the safety and security concerns of tourists is important to establish trust and willingness to travel.

Matiza (2023) highlights the need for improved National and local government prioritisation and investment in domestic tourism which involves tax holidays, discounted tariffs, and a reduction in value-added tax, which would be passed on to domestic tourists through sales promotions, such as discounted travel and accommodation packages that will ultimately increase demand. The importance of non-financial interventions are also highlighted. For example, medium-term goals to improve transport and accessibility to new and untapped geographic regions may be key to revitalising tourism offerings

available to local markets (Matiza, 2023). This is particularly important for countries such as South Africa where the supply of tourism products tends to be geographically disproportionate. These types of interventions serve multiple agendas and could stimulate much-needed local economic growth.

According to the African Development Bank Group (2021), initiatives by various government ministries, destination management organisations, and tourism suppliers can improve identified tourism-oriented infrastructure, develop and innovate tourism products, promote domestic marketing initiatives, and form strategic alliances across the domestic tourism value chain to create special travel packages for local travel. According to Smeral (2023), cooperation between tourism boards, private companies, and the government can help create a cohesive tourism recovery plan. Collaboration can help identify gaps in the market, develop marketing strategies, and provide financial support to small businesses.

As reflected in the literature, the recovery of domestic tourism requires a multi-faceted approach that addresses safety, promotes outdoor activities, and leverages technology. Additionally, the collaboration between different tourism stakeholders is essential in developing an effective recovery plan. As the world continues to recover from the pandemic, implementing these strategies and frameworks will help to ensure that domestic tourism can rebound and thrive in the years to come.

#### **7.4. Education and training**

Prior to the COVID-19 pandemic, there were concerns about the relevance of current educational qualifications and programmes for skills development and training in South Africa. These concerns were highlighted in various studies such as Asmal et al. (2021), Isaacs (2020), and Swartz et al. (2019), with the latter pointing out that post-schooling/ tertiary education in South Africa faced significant challenges. These challenges included issues of relevance and purpose, specifically related to meeting societal and economic demands. It was suggested that effective and relevant educational training and capacity development were crucial to meeting the aspirations outlined in South Africa's National Development Plan, which aimed to address socio-economic challenges such as skills gaps, the quality and impact of training, the employability of graduates, and job creation, as noted by Van der Berg et al. (2020). With the COVID-19 pandemic affecting many sectors, including tourism, there is a need for more attention to be paid to training and research to help the tourism sector take advantage of existing opportunities and be better equipped to address the challenges presented by the pandemic. The tourism sector is a

significant employer in South Africa, with businesses of various sizes and types, and as such, there is a vast potential for professional and vocational training within the sector.

Despite the importance of tourism training and skills development, there is limited research in this area in the South African context discerned from a Google Scholar search. Some examples include:

- Zwane et al. (2017) examine learners' and employees' perspectives of vocational training in the South African tourism sector industry.
- In 2002, Baum wrote about the issues concerning skills and training in the hospitality sector. In particular, Baum (2002) pointed out the challenge of incorporating jobs that are typically regarded as "low skills" into the industry, especially in the context of the changing economy. Today, Baum's (2002) observations are still pertinent and four key areas continue to be debated in relation to skills development. These areas include the nature of work and the skills that are necessary for success in the industry, the phenomenon of de-skilling (which has now shifted towards a focus on re-skilling) in the workplace, the ongoing debate regarding technical versus generic skills, and the relationship between skills development and the education/training process.
- Booyens (2020) is one of the few publications that address education and skills in the tourism sector in South Africa, with a particular emphasis on the implications for youth employment. Booyens (2020) highlights that there is a disparity between the results of education and skills training in tourism and the industry's demands, which must be resolved.
- Du Preez (2017) presents a skills development framework for sports tourism in South Africa that offers valuable insights for the broader tourism industry. Emphasising the significance of internship opportunities and Work Integrated Learning, Du Preez (2017) stresses the need for students and future graduates to gain practical experience in the sports tourism sector.
- Reddy et al. (2018) highlight the tourism sector as a highly sought-after profession in South Africa, with significant demand for skills related to the industry being evident in national, provincial, and municipal plans.
- Walker (2018) points out important considerations for skills development and training, such as the accessibility and effectiveness of capacity development programs, the content and level of qualifications provided in post-schooling, the competency of trainers and researchers, responsiveness to technological advancements, and meeting the diverse needs of different sectors and sub-sectors. The costs and resources associated with training should also be taken into account.

It is important to note that there is no specific research that focuses on domestic tourism training or specific areas of skills development. Evaluations of tourism training and their impacts are also not examined. Furthermore, the technological advancements that have created more opportunities for online and blended/ hybrid (combining physical contact and online) training and capacity development are not assessed. Online learning, where the infrastructure and connectivity permit, also allows for greater flexibility and cost reductions. These changes present new opportunities and challenges in terms of who benefits and what types of training can be conducted for the tourism sector.

### **7.5. Domestic tourism awareness and communication**

Tourism communication strategies and awareness campaigns are essential for promoting responsible tourism practices and increasing awareness among tourists and local communities. In recent years, many organizations and governments have developed various communication strategies and campaigns to promote sustainable tourism and minimise negative impacts on the environment and local cultures. One of the most effective tourism communication strategies is social media campaigns. Tourism boards and organisations can use social media platforms such as Facebook, Instagram, and Twitter to share information, photos, and videos to promote responsible tourism practices and increase awareness among tourists. The Tourism Authority of Thailand launched a social media campaign in 2021 called "Go Local with Tourism Authority of Thailand," which encouraged tourists to explore lesser-known destinations and support local communities (Tourism Authority of Thailand, 2021). This campaign aimed to raise awareness of the importance of responsible tourism practices and promote sustainable tourism in Thailand.

Sustainable tourism certification programmes are another effective tourism communication strategy. These programmes provide a framework for tourism businesses to implement sustainable practices and help to raise awareness among tourists about responsible tourism options. The Rainforest Alliance's Sustainable Tourism certification programme certifies tourism businesses that meet rigorous sustainability standards, providing visible recognition for tourists seeking sustainable tourism options (Rainforest Alliance, n.d.). The programme aims to promote responsible tourism practices and to support local communities and conservation efforts.

Responsible tourism education and training is another effective communication strategy for promoting responsible tourism practices and increasing awareness among tourists and local communities. The

International Centre for Responsible Tourism (ICRT) offers training courses and resources for tourism businesses and destinations to help them develop and implement responsible tourism practices (ICRT, n.d.). This training aims to raise awareness of the importance of responsible tourism practices and to provide the necessary knowledge and skills to implement sustainable tourism practices.

Overall, tourism communication strategies and awareness campaigns play a crucial role in promoting responsible tourism practices and raising awareness among tourists and local communities. Social media campaigns, sustainable tourism certification programs, and responsible tourism education and training are just a few examples of effective communication strategies. By promoting responsible tourism practices, we can ensure that tourism contributes positively to the economic, social, and environmental development of regions and countries worldwide.

Tourism is a significant economic contributor to South Africa's GDP, with the country attracting millions of international and domestic visitors each year. However, the industry faces various challenges, including socio-economic issues, environmental sustainability, and the need to create responsible tourism practices. Effective tourism communication and awareness strategies are essential to promoting responsible tourism and ensuring that tourism benefits local communities and environments.

One of the most effective tourism communication strategies in South Africa is social media campaigns. Tourism boards and organisations can use social media platforms such as Facebook, Instagram, and Twitter to share information, photos, and videos to promote responsible tourism practices and increase awareness among tourists. The South African Tourism Board launched a social media campaign in 2021 called "Meet South Africa," which aimed to showcase the country's diversity and promote responsible tourism practices (South African Tourism, 2021). This campaign aimed to raise awareness of the importance of responsible tourism practices and to promote sustainable tourism in South Africa.

Another effective tourism communication strategy is the use of storytelling. Storytelling is a powerful tool that can engage tourists and raise awareness of responsible tourism practices. The Grootbos Foundation in South Africa uses storytelling to promote responsible tourism practices and raise awareness of the importance of conservation efforts (Grootbos Foundation, n.d.). By sharing stories of the local community and environment, the foundation aims to encourage tourists to support responsible tourism practices.

Tourism education and training is another critical component of tourism communication and awareness in South Africa. The South African Tourism Board offers various training and education programmes to tourism businesses and destinations to help them develop and implement responsible tourism practices

(South African Tourism, n.d.). The programmes aim to raise awareness of responsible tourism practices and provide the necessary knowledge and skills to implement sustainable tourism practices. Effective tourism communication and awareness strategies are crucial to promoting responsible tourism practices in South Africa. Social media campaigns, storytelling, and tourism education and training are just a few examples of effective communication strategies. By promoting responsible tourism practices, South Africa can ensure that tourism contributes positively to the economic, social, and environmental development of the country.

South Africa's tourism industry, which is heavily reliant on international tourism, has been hit hard by the pandemic, as noted earlier. In response, the Department of Tourism has initiated research (including Phase 1 of this project targeting domestic tourism) to develop a Domestic Tourism Recovery Framework to encourage domestic tourism and stimulate economic growth, aligned with the Tourism Sector Recovery Plan (Department of Tourism, 2021). The importance of domestic tourism recovery in South Africa cannot be overstated. According to the UNWTO (2020), domestic tourism is often the first segment of the tourism industry to recover after a crisis, and it has the potential to cushion the impact of a downturn in international tourism. Moreover, domestic tourism can create employment opportunities, generate income for local communities, and stimulate economic growth. The Domestic Tourism Recovery Framework aims to stimulate demand for domestic travel by offering incentives, supporting marketing campaigns, and improving tourism infrastructure and services. To ensure the success of the Domestic Tourism Recovery Framework, it is important to address some of the key challenges that the domestic tourism industry faces in South Africa. Inadequate marketing, promotion, and investment in tourism infrastructure and services contribute to a lack of awareness and appreciation of local tourism offerings. It is essential to address these challenges through targeted communication and marketing efforts, investment in tourism infrastructure and services, and support for SMMEs in the tourism sector.

The recovery of the domestic tourism industry in South Africa is critical for the country's economic growth and job creation. The government's Domestic Tourism Recovery Framework outlines the key aspects for the industry's recovery, but its success will depend on the effective implementation of targeted interventions, investment in infrastructure and services, and strong stakeholder engagement. With the right support and investment, domestic tourism has the potential to contribute significantly to South Africa's economic recovery and resilience.



## 8. Research Methodology

The OECD Policy Responses to Coronavirus (COVID-19) (OECD, 2020) and South Africa's Tourism Sector Recovery Plan: COVID-19 (Department of Tourism, 2021) are key documents that informed the first phase of the study. The knowledge gained during the first phase is used to inform this piloting and refinement of the Domestic Tourism Recovery Framework phase. As indicated previously and noted in the Call for proposals, the proposed Framework outlined during the first phase indicated four steps to reignite domestic tourism demand in South Africa (re-evaluate, reconfigure, respond and stimulate domestic tourism demand) in the context of embracing the ecosystem operating model. To a large extent, the first phase included components of the re-evaluation since the report included an environmental scan using the DPSIR framework and primary data collection, specifically examining insights and perceptions from tourism service providers (supply-side) and public (demand-side) surveys to establish travel interest, behaviour, demand and response. Drawing from these findings and a detailed literature review, the Framework advocated the need to reconfigure, respond and stimulate domestic tourism demand. These components are interrelated.

The piloting of the Framework to refine and finalise for implementation (this phase) involved the following steps detailed in this section:

- Complementing/ building on the literature review undertaken: as indicated above, the literature review undertaken during the first phase detailed numerous aspects pertinent to understanding domestic tourism trends and recovery pathways in the context of high levels of disruptions. However, there was a need to examine more critically domestic tourism recovery strategies and schemes as well as update the literature review.
- Stakeholder identification, mapping and engagement: the tourism sector (including domestic tourism) operates in a multi-sectoral and complex environment with internal and external influences and stressors. This requires alignment and buy-in to implement the Domestic Tourism Recovery Framework and Domestic Tourism Scheme specifically. Thus, the need for centralising stakeholder identification and engagement.
- Development of a domestic tourism awareness and communication framework.
- Identification of skills development and training support to reposition domestic tourism to be a job creator/ generator as well as ensuring training and skills investments to address the needs of the domestic tourism sector.
- Development of the indicator framework for monitoring and evaluation purposes.
- Refinement of the Domestic Tourism Recovery Framework.

A mixed methods research design was used, using a desktop approach to build on the literature review undertaken during the first phase and qualitative engagements with stakeholders. As indicated earlier, the Domestic Tourism Recovery Framework developed during the first phase integrated a desktop study as well as quantitative methods, including online surveys among the general public (the domestic tourism market) to examine past, current and future travel patterns, intentions and perceptions. A survey was also conducted with targeted tourism service providers (including the accommodation sectors, tour operators, tourism establishments, etc.) to examine their readiness and willingness to reignite domestic tourism and their perceptions of challenges and opportunities. The database and networks established in relation to the tourism service providers were used during the stakeholder engagement step.

For the stakeholder engagements, focus group discussions and key informant interviews with purposively selected groups of tourism service providers (such as the accommodation sector, tour operators, tourism establishments, event/ festival organisers, tourism trainers, government officials, etc.) and knowledgeable individuals, respectively, were the main approaches to solicit views, perspectives and concerns on domestic tourism recovery initiatives, including the Domestic Tourism Scheme. The systematic collection of information derived from the desktop study and stakeholder engagements informed the development of the domestic tourism communication framework, the identification of training needs, the refinement of the Domestic Tourism Recovery Framework and the development of appropriate indicators as part of the monitoring and evaluation approach. A more detailed discussion of each of these steps follows.

### *Step 1: Desktop study*

The desktop study complements the literature review undertaken during the first phase, focusing on international domestic tourism recovery initiatives and schemes to identify best practices and current approaches. These are analysed and assessed in this report in relation to the South African context. Key implementation lessons and challenges were identified to inform the piloting and refinement of the Domestic Tourism Recovery Framework and the operationalisation of the Domestic Tourism Scheme. Attention was also paid to inform the development of the indicator approach for monitoring and evaluation. The main sources of information for the desktop study were the internet focusing on policy and position papers, journal articles, books, conference proceedings, popular media articles and studies conducted

by tourism organisations and other relevant bodies. Given that the impacts of the COVID-19 pandemic, as well as responses to these, came to the fore in 2020, literature searches using academic repositories/databases such as Web of Science and Google Scholar were confined to 2020 onwards. The search was undertaken using a set of keywords including domestic tourism recovery, domestic tourism resilience, domestic tourism sustainability and domestic tourism in a post-COVID world.

#### *Step 2: Stakeholder identification, mapping and engagement*

As indicated earlier, focus group discussions and key informant interviews were undertaken with tourism stakeholders to ensure that all interested and affected parties are identified, solicit views on the Domestic Tourism Recovery Framework and Domestic Tourism Scheme, and examine the resources and support required for implementation. Both online engagements and face-to-face interviews were conducted since online platforms have become popular and cost-effective ways of undertaking focus group engagements and interviews. A focus group and key informant interview schedule (Appendix 1) was developed to guide the discussions that align with the objectives of the study and include aspects such as:

- The profiles of tourism service providers/ stakeholders engaged with.
- Perceptions of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme (including opportunities for implementation and anticipated challenges).
- In relation to piloting the Domestic Tourism Scheme as a case study, willingness to support the Scheme was established together with views on how the Scheme can be implemented in the context of the Domestic Tourism Recovery Framework.
- Areas/ aspects of the Domestic Tourism Recovery Framework that should be revised.
- Perceptions about how best to communicate the Domestic Tourism Recovery Framework to the broader public and key stakeholders, and who should be responsible for this communication.
- Feasible and appropriate indicators to monitor and evaluate the implementation of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme.

In terms of data collection, the focus group discussion and key informant interview schedule was compiled, approved by the Department of Tourism and reviewed, together with the proposal, by Prof Kamilla Swart. Additionally, ethical approval was applied for from the University of KwaZulu-Natal's (UKZN) Human and Social Sciences Ethics Committee as an amendment to the initial Phase 1 application and was approved. Data collection commenced once ethical approval was granted.

In terms of sampling for the tourism service providers and other stakeholders, a sufficiently large number of focus group discussions (at least 5) and at least 20 key informant interviews were the targets to ensure that different types of tourism service providers in different localities are included using the purposive sampling approach. Knowledgeable persons and organisations/ stakeholders were targeted. Local and provincial tourism departments, national departments (including the Department of Tourism and South African Tourism), tourism educators and researchers, and representatives from tourism organisations (such as Fair Trade in Tourism in South Africa, National Accommodation Association of South Africa, South African Association for the Conference industry, Southern Africa Tourism Services Association, Tourism Business Council of South Africa, Tourism Grading Council of South Africa, the Restaurant Association of South Africa and Federated Hospitality Association of South Africa) were targeted together with different types of tourism service providers including the accommodation sector, tour operators, tourism agencies, event/ festival organisers and businesses/ retail establishments located at key tourism destinations. The database of stakeholders expanded as the study/ engagement process proceeded. The focus group discussions and key informant interviews were undertaken concurrently. Attention was paid to ensuring that different tourism sub-sectors are represented and that there is spatial representation.

In terms of data collection, the primary data collection completed was:

- Four focus group discussions: provincial and national tourism officials, tourism organisations, tourism educators and Technological Higher Education Network South Africa (THENSA) affiliated institutions and tourism organisations involved in the Tourism Education Gateway initiatives, and tourism officials from the National Department of Tourism's training department.
- Twenty four key informant interviews: were conducted with tourism organisations (such as representatives from Brand South Africa and Federated Hospitality Association of South Africa), tourism government officials (national, provincial and local from tourism and economic departments), tourism service providers (mainly from the accommodation industry/ hospitality sector and tourism operators/ businesses), the media (a journalist) and tourism researchers/ academics.

It is important to note that the target of five focus group discussions will be met since it was agreed that engagements with the communication and marketing officials and other stakeholders be conducted when the report is finalised. The targeted 20 key informant interviews were exceeded, with 24 completed. It is important to note that there was interest in participating in the study but the timing (data collection mainly

undertaken in December 2022 and January 2023) was inconvenient and the loadshedding disruptions impacted the data collection and write-up. Additionally, a Theory of Change and Logical Framework workshop was held, which is used to develop the indicators to inform the monitoring and evaluation.

### *Step 3: Development of a domestic tourism awareness and communication framework*

Drawing on the desktop study and stakeholder engagements, an evidence-based domestic tourism awareness and communication framework was developed. The desktop component and stakeholder engagement in Step 1 and Step 2, respectively, included a review of the current body of literature on domestic tourism and communication strategies and stakeholder views on who the key target groups should be and the most appropriate communication strategies and methods. The focus was also on the Domestic Tourism Scheme, which is the case study, by undertaking a status quo assessment of channels and means of domestic tourism communication programmes and plans as well as the levels of awareness of the components of the Scheme. The domestic tourism awareness and communication framework includes the following aspects:

- Alignment of domestic tourism objectives and communication objectives
- Identifying key target groups/ audiences and resources needed in the context of guiding principles such as cost-effectiveness, being outcomes-based and impactful and being inclusive and diverse
- Key messages
- Main communication mediums
- Implementation recommendations (including the identification of implementers and champions as well as indicators to evaluate success which are included in the monitoring and evaluation indicator approach)

### *Step 4: Identification of skills development and training support*

Drawing on existing research such as the audit of tourism and hospitality-related qualifications in affiliated THENSA institutions in South Africa (Bob, 2022) as well as engagements with stakeholders and branches in the Department of Tourism that deal with skills development, the following aspects were examined:

- Existing skills development and training areas (including who are the service providers)
- Skills development and training gaps that need to be addressed to support the implementation of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme

- Development of the training guidelines

*Step 5: Development of the monitoring and evaluation indicator approach*

The Domestic Tourism Recovery Framework developed during the first phase outlined the reasons for domestic tourism monitoring and evaluation and identified the Department of Tourism as the overall domestic tourism monitoring and evaluation custodian/ champion. The need for a monitoring and evaluation communication approach was outlined to include the importance of identifying organisations and individual target groups (specifically domestic tourism information/ data collectors/ generators, information/ data managers and information/ data users), timeframes and reason/s for communication. The need for institutionalisation and training of the target groups was noted together with developing capacity (having sufficient resources), capabilities (trained personnel) and data infrastructure/ management systems that interface with other systems where relevant domestic tourism data is stored (embedding the monitoring and evaluation system). Actioning entails developing domestic tourism monitoring and evaluation indicators to assess progress and evaluate impact. Specifically, the need to focus on Tier 1 indicators that are conceptually clear with established methodologies and standards that are available and data is regularly produced is underscored. Tier 1 indicators are also characterised by an established track record of collecting and reporting on these indicators. It was also recommended that capacity is built to report on Tier 2 (conceptually clear with established methodologies and standards but data is not collected regularly) and Tier 3 (regarded as important but no established methodologies and standards, and data is not collected) indicators.

Thus, this study, aligns with the Theory of Change approach discussed earlier, focusing on the following:

- Identifying Domestic Tourism Scheme activities that require indicator development for the purposes of monitoring and evaluation.
- Developing the monitoring and evaluation communication approach by identifying organisations and individual target groups.
- Noting monitoring and evaluation training needs (including for each target group) that emanated from Step 4.
- Developing domestic tourism monitoring and evaluation indicators linked to the Theory of Change and Logical approach focusing primarily on Tier 1 indicators.

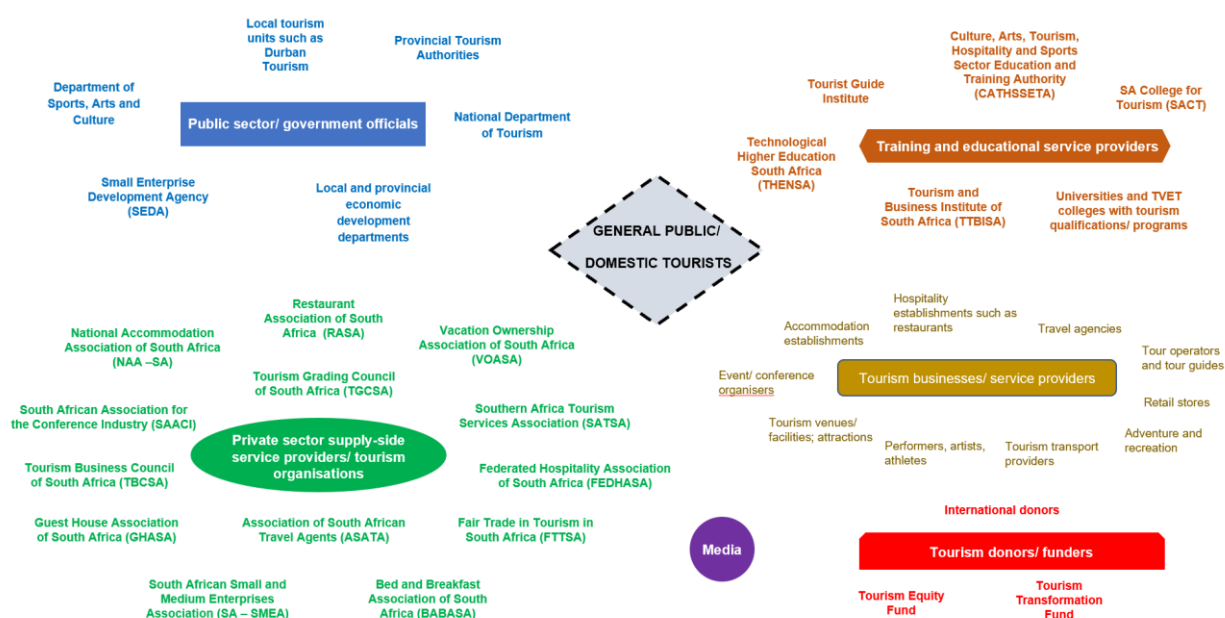
## Step 6: Refinement of the Domestic Tourism Recovery Framework

The information emerging from the desktop study and the stakeholder engagements (using the Domestic Tourism Scheme as a case study) together with the development of the domestic tourism awareness and communication framework, identification of skills development and training support, and the development of the monitoring and evaluation indicator approach are used to revise and refine the Domestic Tourism Recovery Framework for implementation.

## 9. Findings/ analysis of focus group discussions and key informant interviews

As indicated in the methodological approach adopted, the engagements with stakeholders were informed by undertaking domestic tourism stakeholder mapping. The Figure below displays the key stakeholders identified. The main stakeholder categories identified were the general public/ domestic tourism, public sector/ government officials, private sector supply-side service providers/ tourism organisations, tourism businesses/ service providers, training and educational service providers and the media.

Figure 2: Mapping of key stakeholders influencing or being influenced by domestic tourism



As noted in the previous methodology section, the key informants and focus group participants were from the different stakeholder categories, with the exception of the general public/ domestic tourists. The general public and tourism services providers were the main components of the Phase 1 quantitative study which informed the development of the proposed Domestic Tourism Recovery Framework. The main domestic tourism interests among the respondents were linked to the category they were from and their positions held which included:

- Domestic tourism development/ economic development
- Support services for domestic tourism
- Tourism service providers (accommodation, hospitality and tourism operators)
- Event/ conference organising
- Associations/ organisations linked to tourism
- Development, coordination and implementation of domestic tourism programmes
- Research and training (including teaching) linked to domestic tourism
- Media coverage (including newspapers and travel magazines) of tourism-related stories and features

Key informants and focus group participants were at different levels, from Directors to senior researchers to staff within organisations and businesses that were established and operational for more than 30 years to those who had just started (less than a year). Two of the government officials interviewed were involved in the development of the Domestic Tourism Scheme. The size of the organisations/ businesses also differed considerably from the respondent being the only person employed to organisations/ enterprises employing more than 100 persons. The profiles of the respondents/ participants reflect the diversity of the sector and different interests, thus suggesting that the methodological approach adopted solicited diverse views and perspectives.

Building on the first phase and drawing on the updated literature review (focusing on best practices) and primary data findings, the qualitative responses derived from the focus group discussions and key informant interviews during this phase were subjected to a thematic analysis, aligned to the research questions and objectives. The information was coded thematically using Excel spreadsheets, and is used to systematically revise the Domestic Tourism Recovery Framework, including the development of the domestic tourism communication framework, skills development focus, and monitoring and evaluation indicator approach. The findings are summarised in this section. Furthermore, pertinent findings are integrated into the revised Domestic Tourism Recovery Framework as well as the domestic tourism



training and skills development, awareness and communication framework, and monitoring and evaluation approach sections. The rest of this section provides an overview of the main findings of the qualitative research linked to the themes (questions) covered in the interview schedule.

### **9.1. Key challenges that domestic tourism faces in South Africa**

A range of challenges that domestic tourism faces in South Africa were identified by the key informants and the focus group participants including:

- **Financial:** both in relation to the lack of disposable income among the majority of the South Africa population due to high levels of poverty/ unemployment or debt. The current economic recession and cost of living also prevent people from travelling. Another component of financial constraints identified was the lack of funding available from the public and private sectors to support domestic tourism businesses (especially to deal with the devastating impacts of the COVID-19 pandemic) and the Domestic Tourism Scheme. Additionally, a concern raised by one of the government officials is that tourism attractions “have not responded (price-wise) to South Africans”, with a large part of tourism attractions being priced at the international level which makes them unaffordable to most South Africans. Specific examples of major tourist attractions that are not affordable for most locals were the Kruger National Park, Table Mountain and Robben Island. Affordability is the main reason identified by one of the government official key informants that result in visitors staying with friends and family rather than using an accommodation establishment. Furthermore, high fuel costs were noted by one of the focus group participants as hindering tourism.
- **Safety and security:** safety concerns with crime were the most prominent challenge facing domestic tourism in South Africa identified by almost all the respondents/ participants. A tourism service provider stated that crime “can deter both domestic and international tourists from visiting certain areas”, asserting that “this is particularly true for tourists who are unfamiliar with the country and its customs”. The media key informant stated that “criminality is destroying the industry”. Crime in particular, according to one of the government economic development key informants, particularly impacts the inner cities and township tourism. Furthermore, crime restricts tourism activities, impacting night life and business operations after working hours. Visible and effective security is deemed to be lacking in South Africa.
- **Infrastructure and service provision:** limited infrastructure and service provision continues to compromise economic development in South Africa, limiting domestic tourism. Particularly, it was noted by one of the tourism service provider respondents that “while South Africa has a good

transportation network, there are still many areas that are difficult to access. This can limit the number of destinations that are available to domestic tourists". There are limited bus and rail options for poorer segments. One of the government official key informants identified airline travel, which has increasingly become limited and costly: "with the collapsing of a few Airlines, the cost of travel is just so expensive". Thus, air access is a challenge both in relation to quantity and affordability. Other infrastructural challenges relate to energy provision (with loadshedding severely impacting tourism) and internet connectivity. The energy disruptions were also seen by one of the focus group participants as increasing the costs for tourism businesses that "have to keep the lights on". In terms of connectivity, one of the focus group participants stated "tourism players in these areas (rural areas and townships) do not have easy access to WIFI and mobile data that is extremely expensive and so there is no access to all the information some of the bigger players have easier access to". One of the government economic development key informants stated that the inefficiencies in local government is a key reason for the infrastructural and service challenges, specifically not fully grasping how and what they do (from maintaining roads to signage) affects the tourism sector. Mention was also made of low service skills and customer-orientation in the tourism sector. Staffing issues were also noted in relation to inadequate skills among persons working in the tourism sector, staff turnover and retention of staff (often due to long working hours, seasonal work and job insecurity). Accessibility to tourism information was also identified as a challenge by one of the focus group participants.

- Perceptions and knowledge of domestic tourism products and opportunities: some South Africans (especially those with disposable income) may not see the value in domestic tourism, preferring to spend their money on international travel instead which results in "competition from international destinations since South Africa competes with other popular international tourist destinations, which can make it more difficult to attract domestic tourists (with high incomes) who prefer to travel overseas" (tourism service provider respondent). Linked to the cost of airline travel, one of the government official key informants stated that the "flight tickets from Johannesburg to Cape Town are too expensive nowadays. So it would be better to use the same amount of money and maybe go to Mauritius". Another government official stated that the average South African is not aware of the tourist attractions in the area where they reside.
- Seasonal fluctuations: domestic tourism in South Africa is affected by seasonal fluctuations, with many tourists preferring to travel during peak periods such as school holidays and long weekends. There is often limited appetite for off-season or off-peak travel when service providers are in a better position to reduce costs and offer deals.

- Marketing and promotion: there may be a lack of effective marketing and promotion of domestic tourism in South Africa (limited marketing), which can limit its visibility and appeal to potential tourists. A government official key informant stated that South African marketing has failed to present integrated solutions for the domestic market, noting overseas markets have integrated packages that include “flights, ground travel, accommodation, meals, entertainment, which are reasonably priced”. The need for integration was also noted by the media key informant who indicated that government needs to assist the tourism sector to make “links with other sectors that could lead to increased clientele”. Another government official key informant stated that domestic tourism packages are geared towards certain types of people, and not young South Africans who want to have fun, indicating that they are often issues such as not being noisy that dissuade young people from travelling. An accommodation business key informant also noted that in South Africa restaurants tend to close early. Additionally, only a few domestic tourism locations and products are marketed, neglecting many local domestic tourism destinations. As one of the business accommodation respondents stated, “small towns do not have the funding/ municipal support for destination marketing, so larger cities are main beneficiaries of tourism, and they tend to be geared towards international tourism, thus expensive and not necessarily authentic”. One of the government economic development key informants also highlighted that current domestic tourism marketing strategies tend to focus on products rather than experiences which is one of the main reasons that they are ineffective. Furthermore, as one of the focus group participants stated, many types of tourism (such as rural and cultural) are not sufficiently profiled and marketed.
- Oversupply of specific types of accommodation: one of the focus group participants noted that “AirBnB flooded the market - small hotels and B&Bs struggle to keep up”.
- Pollution and litter/ grime: some of the respondents/ participants noted concerns that some key domestic tourism destinations have pollution issues (both in relation and beach quality), with one accommodation business key informant identifying Durban as an example and stating that “people complain about how dirty the city and beaches are”. One of the hospitality key informants stated that “environmental degradation and the decline of natural attractions such as the currently polluted beach waters have also impacted domestic tourism negatively”.
- Accessibility and discriminatory practices: One of the government official key informants also raised concerns in relation to access in terms of persons living with disabilities and racism that some groups experience. The key informant stated that infrastructure and facilities (including those in the tourism sector) generally do not “subscribe to universal accessibility principles or

prescripts". Furthermore, the key informant also referred to incidents of racism, with reports of people who booked a facility using an online platform or phone being told that the venue or establishment is no longer available (although there is a vacancy) when the establishment ascertains that the person is a person of colour.

- Reputation and image: various aspects identified above (such as service provision challenges associated with loadshedding and crime) as well as governance issues such as corruption affect the country's reputation which affects tourism and the willingness of South Africans to be brand ambassadors and encourage other citizens to travel.
- COVID-19 pandemic and other disruptions: the impacts of the pandemic are still being felt and many tourism service providers have not been able to recover fully and some were forced to shut down. One of the government economic development key informants noted that Black SMMEs are particularly vulnerable to disruptions (which also affects the ability of the tourism sector to meet transformational imperatives), providing examples of the COVID-19 pandemic and the recent floods in KwaZulu-Natal and other parts of South Africa. Thus, natural disasters associated with climate change are likely to be major disruptors.

A comment by one of the research key informants is worth noting, cautioning that the distinction between domestic and international tourism is problematic:

It is important to note that domestic tourism and international tourism are often interrelated. Domestic tourists enjoy interactions with international visitors and vice versa. In fact, some international visitors travel during off seasons do so not only to reduce costs but also interact more with local tourists who generally travel during these off-peak times because of reduced costs and congestion (not competing with tourists during peak times). Also, some tourism activities (I am involved in educational tourism), specifically student exchange activities with university students, and usually include South African students joining foreign students to enrich the interactions. They travel across the country, which includes visiting key tourism sites such as Robben Island, nature reserves/ parks, and museums.

The impacts of the COVID-19 pandemic on domestic tourism was the key focus of the Phase 1 study. One of the research key informants and focus group participants aptly summarised the key impacts, highlighted in the Phase 1 report as well:

- Travel restrictions, especially during the lockdown levels, limited the ability of people to travel within the country. The pandemic severely impacted the travel, accommodation and hospitality

sectors, especially the airline industry that is still trying to recover. A reduced number of airline passengers and hotel bed nights were experienced.

- A decline in demand (and supply) since many South Africans faced financial difficulties due to the pandemic, which led to a decline in demand for domestic tourism. One of the key informants stated that “there was limited supply, in terms of packages, from an affordability perspective and even from a marketing perspective”.
- There was and remains the fear of contracting the virus which may have discouraged some people from travelling.
- Many tourism-related businesses, such as hotels, restaurants, and tour operators, were forced to close or reduce their operations due to the pandemic. This led to a loss of jobs and income for those who work in the tourism industry. It was noted by one of the focus group participants that there is no database of businesses that went under due to the COVID-19 pandemic.
- Changes in travel behaviour, with many people preferring to travel to more secluded destinations or opting for outdoor activities to reduce their risk of contracting the virus. The increase in staycations is also evident. As one of the focus group participants stated, “people are looking for more affordable experiences and establishments in rural areas and townships need to capture segment of markets” and the “development of establishments nearer to where people stay” is important which requires new products to be developed. There is also the “drive for tourism products to discount deals – but tourism service providers are unable to respond” (focus group participant). Another focus group participant noted the importance of ‘daybreaks’ that can expose locals to tourism products and encourage them to become more adventurous in their travel choices. One of the key informants aptly summarised the inability of the tourism sector to pivot to understand domestic tourism: “locals who didn't know what was in our own backyard and tour operators who didn't know how to target local tourists and how they think”. Some businesses did respond, as another key informant stated, that “diversified their product offerings, such as short stay incentives and day visits, which helped them survive”.
- Increased the focus on health and safety in the tourism industry, with many businesses implementing new protocols to ensure the safety of their guests.
- Disruptions to training: the training focus group participants noted impacts in the training space that included the unavailability to host Work Integrated Learning, high demand for enrolment among learners who viewed training as an opportunity to get money which was an indication of the lack of job opportunities and inability to enter the workforce, and the tourism industry hosted learners as a source of cheap labour but were not able to absorb the learners into the workforce.

The training was thus not viewed as a priority but as business survival. The investment in training also declined because of limited private sector support.

Business priority has changed and, therefore, there is a need to rethink support for the sector; not only in relation to what training should focus on but how the training should be undertaken. The focus groups noted the importance of training that focuses on domestic tourism and improving the professionalisation of the sector that is critical to improve the quality of services.

- The South African government provided financial support to the tourism industry to mitigate the impacts of the pandemic, but these were limited. This included measures such as the Tourism Relief Fund and the COVID-19 Loan Guarantee Scheme. The government Unemployment Insurance Fund payout was very important for many businesses and employees.

It was further noted that these impacts remain (and even if not still in place, such as travel restrictions, there is fear that this could happen while people are travelling). The research key informant stated that “the COVID-19 pandemic has had a significant negative impact on domestic tourism in South Africa, but the industry is slowly recovering as restrictions are lifted and vaccines are rolled out”. Thus, the results reveal that there are high levels of awareness of the impacts of the COVID-19 pandemic on domestic tourism and recognition that the sector is on a pathway to recovery.

One of the tourism service provider key informants stated that the “challenges that domestic tourism faces link to economic constraints with many South Africans facing financial constraints that limit their ability to travel within the country”. Additionally, one of the educator key informants and a focus group participant stated that in South Africa people lack a “culture of travel”. These challenges also emerged in the Phase 1 report and were considered in the proposed Domestic Tourism Recovery Framework. The key challenges that domestic tourism faces in South Africa are related to externalities such as loadshedding and fuel prices as well as promoting a culture of travel within the country. Additionally, promoting the consumption of tourism products when visiting friends and family (the main reason for domestic travel) is identified as well.

## **9.2. Key opportunities that domestic tourism faces in South Africa**

Despite the challenges identified above, key opportunities that domestic tourism faces in South Africa were identified by the key informants and focus group participants. There was general consensus that domestic tourism is key to tourism recovery in South Africa and globally, and that there are many

opportunities for domestic tourism in South Africa, and the industry has the potential to contribute significantly to the country's economic growth and development. Some of the opportunities identified were:

- Tourism products and experiences: South Africa has many natural attractions, such as beaches and conservation areas (national parks and game reserves) that provide opportunities for outdoor activities and ecotourism. The prominence of natural spaces is an opportunity to respond to the increase in outdoor and adventure activities: “as people seek to avoid crowded indoor spaces, there is a trend towards outdoor activities like going to beaches, parks and other adventure-based tourism options” (restaurant key informant). This was supported by focus group participants as well with one stating, “after the pandemic, everyone is really looking for new outdoor experiences”. The country has a rich cultural heritage and attractions that include “traditional music, dance, and art, as well as historical sites related to the country's apartheid-era and colonial past” (business key informant). South Africa also has forms of adventure tourism such as hiking, rock climbing, and water sports that attract domestic tourists seeking an adrenaline rush. Additionally, rural areas in Africa offer opportunities for agri-tourism, farm stays, and other rural experiences, which can attract domestic tourists looking for a unique travel experience. Furthermore, there are niche tourism experiences such as wine and township tourism.
- Domestic travel incentives: the South African government has implemented several measures to encourage domestic tourism, such as offering tax incentives for tourism-related businesses and promoting domestic travel through marketing campaigns. However, many businesses and people were and are not aware of these incentives. One of the tourism association key informants noted the partnerships with travel and organisations, such as the Stokvel schemes, promoted by government.
- Demand: there are low cost tourism destinations that can be affordable for specific domestic tourism markets. As one of the restaurant key informants asserted, there is a “shift towards more affordable options” and “a demand for more affordable travel options and experiences within South Africa”. Additionally, as one of the government official key informants stated, “people who otherwise would have gone overseas for travel, are looking for good options within the country”. Similarly, the hospitality key informant stated that “the middle-class citizen has become more interested in travelling locally, providing a huge opportunity for the hospitality industry to tap into this market segment”. Another government official key informant noted that “post COVID or in the last year or so, people have started travelling again, with families and as groups again” which provides “an opportunity for the tourism businesses to be able to respond to the needs and

requirements of the local tourists”. This pent-up demand was also noted during the focus group discussions. There is also the opportunity to diversify the tourism offering: “domestic tourists can provide a new market for South Africa’s tourism industry, which can diversify the offering and reduce the reliance on international visitors” (restaurant key informant). One of the economic development key informants highlighted the importance of developing specific types of tourism such as education/ school tourism, advocating for learners/ students to be supported to travel “using the logic that a science learner must have access to a lab, etc. to understand subject matter, the same approach should be adopted for learners studying tourism”. Additionally, “learners can encourage family and friends to explore opportunities”.

- Location: many tourism opportunities are in close proximity (literally in the backyard) for many South Africans.
- Digital/ technological changes: technological and digital advancements have created more opportunities for training and marketing. One of the government official key informants asserted that “the digital space has enabled people to embellish on places and parts of our country that would otherwise not be seen by those that don’t reach them” and “it allows for interaction, it allows for youthfulness and it allows for them (tourism businesses and attractions) to reinvent themselves”. This was also supported by another government official key informant who asserted that technology permits us to “do many more things online (meetings, improving on social presence, product offering, bookings, virtual tours using augmented reality)”, further noting that “augmented reality can provide a window into the tourism offerings of South Africa and entice people to visit these places in person”. Understanding and better-using technology are important for marketing, especially when targeting youth.
- Sustainable tourism: there is also an increasing interest in sustainable tourism in South Africa, with tourists seeking eco-friendly and socially responsible travel options. This can provide opportunities for tourism businesses that prioritise sustainability. The hospitality key informant asserts that “the South African hospitality industry has been making an effort to promote sustainable tourism”, responding to a growing demand among domestic travellers. The hospitality key informant provides an example of hotel groups that have energy-saving features in their hotels which “is an opportunity for the industry to differentiate itself and attract environmentally conscious tourists both locally and internationally”.
- Climate change awareness: linked to sustainable tourism is the increasing focus on the tourism sector to better understand and respond to climate change with an increase in “climate-smart tourism activities which limit the impact on receiving environment” and alignment “with the



circular economic model” (research key informant). This, the key informant argues, “is an opportunity to educate tourists on these matters, so that they can make informed decision”.

One of the positive outcomes of the COVID-19 pandemic identified by one of the government official key informants was that challenges experienced by domestic tourism have significantly declined, arguing that COVID-19 was “actually a silver lining for domestic tourism, because before it was not front and centre of the tourism agenda, as we were very much as a country focused on inbound or international tourists”. One of the focus group participants also highlighted that there is a new appreciation to travel post the COVID-19 disruptions.

### **9.3. Perceptions of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme**

This sub-section examines the perceptions of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme, including opportunities for implementation and anticipated challenges. Domestic Tourism Recovery Framework and Domestic Tourism Scheme were circulated to key informants and focus group participants prior to the engagement. Very few participants were aware of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme prior to the information being sent, although more respondents were aware of the overarching Tourism Recovery Framework. It is interesting to note that even most of the tourism government officials were not aware of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme. There was also confusion about the links between the two documents with one government key informant incorrectly stating that the Domestic Tourism Recovery Framework came before the Domestic Tourism Scheme. Among those who were aware, most admitted that prior to being sent the documents, they were aware of the Framework and Scheme but not the contents. Among those who were aware of the Domestic Tourism Scheme, the content knowledge related to the Scheme seeking “to raise awareness about domestic travel and attractions. It also targets especially the disadvantaged, to offer them opportunities and expose them to what tourism has to offer” (government official key informant), “incentives for locals to travel in South Africa that aims to encourage domestic travel, boost the local tourism industry”, “the Department of Tourism has created the Domestic Tourism Scheme with the goal of promoting travel and tourism to the previously disenfranchised individuals of South African society”, “Schemes initiated before, for example, travel stokvel, contributing monthly for holiday once a year” (economic development key informant) and “those with limited financial means and create job opportunities while promoting the country's natural and cultural attractions” (research key informant).

During the focus groups, each of the components of the Scheme was discussed, as indicated below:

- Sho't Left Domestic Marketing Campaign: was regarded as a good campaign but needed to be realistic in the context of various challenges such as loadshedding and high unemployment (discussed earlier). This was viewed as the most iconic and entrenched/ recognised campaign to encourage domestic travel in South Africa. There was also concern that the campaign was not reaching out to the wider community, for example, rural areas and schools. There is a need to rethink the campaign and who is being targeted in the context of the dominance of technology for marketing. Thus, the campaign was not deemed to be reaching a wider community, such as educational tours to enable learners to be exposed to subject matter that is practical. 'It's your country, enjoy it' was also noted as a marketing campaign linked to Sho't Left that faces similar challenges. Additional challenges identified were that platforms to load deals were not user-friendly and there were delays when uploading packages.
- 'Welcome' initiative: was seen as being neglected in terms of partnerships that were entered with the private sector, for example, Engen petrol attendants were taught by South African Tourism how to be brand ambassadors. Tourism specialism was also provided as an online course offered by South African Tourism that provides an understanding of the whole, especially targeting small businesses to assist with improved service delivery. This initiative was also viewed as being well entrenched although concern was raised that the marketing, communication and messaging were international facing rather than targeting domestic tourists.
- Discounted rates – particularly off-peak: this can help, especially when timed well, to advise people of off-season rates. These should be marketed earlier so that people can save and take advantage of discounted rates during tourism. There is also a need to link discounted rates to festive holidays. Discounted rates and other incentives for persons who become members of the Scheme: it was felt that there should be criteria for who should be members that are determined by Scheme. Furthermore, one of the focus group participants suggested that there is a need to pilot in a particular region and market to check whether feasible to assess implementation. Some participants were also aware of schemes operated by the private sector, which was seen to be too costly for most South Africans to benefit from and, therefore, a government scheme was advocated that would be more inclusive. It was unclear as to who was responsible for advertising the discounted rates programmes. Providing payment plans or layaway options can help to spread out the cost of travel over a longer period, making it more manageable for those on a tight budget.

- Holiday/ travel vouchers: were supported but concerns raised in terms of implementation linked to the possibility of corruption discussed later. Vouchers can be used to offset the cost of travel and accommodation, and can be targeted towards low-income families or residents of specific regions.
- Encourage tourism establishments to provide staff to use organisation-owned establishments: it was noted that establishments must be in a good condition and that big corporates, such as mining companies, are best positioned to support this initiative.
- Tourism Grading Support Programme: it was noted that any company that is graded is viewed differently. Challenges and loopholes were noted that included renewals on an annual basis that required the monitoring of graded establishments. Financial implications were also identified linked to the costs of grading and there being no guarantee that when graded more revenues will be generated that justify the investments. Thus, tourism products do not seem to see the tangible benefits of being graded, especially in the context of long processes and costs. It was also noted that although it is important to establish and maintain standards, its relevance is waning since travellers are more influenced by comments on social media. Consumer education on grading is important to elevate the importance of this component.

Other initiatives were identified such as the 'We do tourism' campaign that is well-positioned to educate South Africans. The need to include marketing in training and targeted campaigns to inculcate a culture of travel targeting specific groups (such as schools and old-age homes) was also noted. One of the focus group participants made reference to training during 2010 that targeted young people to know their country and city. A programme such as this should be resuscitated using media that can encourage South Africans to visit tourism products. The training can be on virtual platforms. Investment opportunities and providing incentives and support (including resolving challenges faced) for SMMEs in the tourism space were also identified. Skills development was also viewed as central because of the high levels of job losses during the pandemic. One of the focus group participants indicated that there is a general lack of a proper diagnostic of what tourism skills are present and what is lacking as an industry, particularly in the new age with a focus on digital skills. The challenges that domestic tourism faces, as discussed earlier, need intersectoral engagements that the Domestic Tourism Scheme addresses.

There was generally support for the Domestic Tourism Scheme by both the key informants and focus group participants. There was also a willingness among most of the key informants and focus group participants to support the Domestic Tourism Scheme and undertake training about the Scheme. In terms of the latter, this was dependent on resources being available, including covering costs such as travel and

data for connectivity if online, and the content being relevant. It was suggested that existing platforms for information sharing be used. Those key informants and participants who expressed a low level of willingness to support the Domestic Tourism Scheme stated that this was because of a lack of awareness of the Scheme and being able to see the tangible benefits as well as a lack of trust in government to deliver, raising credibility concerns.

The priority areas for the Domestic Tourism Recovery Framework and Domestic Tourism Scheme identified by the key informant interviewees and focus group participants were:

- Implementing the incentives in the Domestic Tourism Scheme. One of the research key informants stated: “now that I know that the Scheme is to target poor people and historically disadvantaged groups specifically, prices should be reduced which means working with the transport, accommodation and tourism service providers to have different packages and offers for different groups”. School, tour groups, senior citizens specials and loyalty schemes were identified as key areas for implementation. The importance of partnerships was also stressed with one of the economic development key informants stating that “the specific type of tourism should also have different approaches, for example, sports should engage with professional sport leagues as strategic partners”.
- Prioritising specific types of tourism. Educational, rural, small town and sports tourism were specifically mentioned.
- Promoting local destinations: with travel challenges still being experienced, the focus should be on promoting local destinations and encouraging South Africans to travel within their own country. Marketing campaigns should highlight the country's natural and cultural attractions, as well as off-the-beaten-path destinations. Route packaging targeting domestic tourists was also highlighted. Destination development and management were also noted that include developing new tourist destinations, improving existing ones, and managing them sustainably to ensure long-term viability. Developing special promotions and packages for domestic travellers, such as discounted rates for accommodation or bundled tour packages, can incentivise them to travel.
- Supporting persons with disabilities to travel was also raised. Specifically, one of the restaurant key informants stated that a priority should be “ensuring that domestic tourism destinations are accessible and inclusive to all, including people with disabilities”.

- Health and safety protocols: as the pandemic is still ongoing, it is important to ensure that health and safety protocols are in place and adhered to in all tourism-related businesses, including hotels, restaurants, and tour operators.
- Digital transformation: the pandemic has accelerated the shift towards digital transformation in the tourism industry, providing support to businesses to adapt to this change should be prioritised. This could include training and capacity building in areas such as e-commerce and digital marketing.
- Infrastructural investments: this should include investing in new infrastructure and facilities (especially to link more remote areas) and upgrading existing facilities.
- Supporting SMMEs: SMMEs have been hit hard by the pandemic and may require additional support to recover. Financial and technical support to these businesses should be prioritised.
- Job creation and poverty alleviation: creating new job opportunities and reducing poverty through initiatives such as skills training and the development of new tourism products should be prioritised. One of the accommodation establishment key informants referred to embracing “revolutionary tourism”, stating that “marketing won’t make people travel - its better living conditions and spaces that will”.
- Sustainability: support businesses that are committed to sustainable practices and environmental conservation.

The key implementation challenges identified include:

- Financial constraints: implementing some of the activities, programmes, and incentives identified in the domestic tourism scheme may require significant financial resources, which could be a challenge for the government and tourism industry stakeholders to secure, particularly in the current economic climate. Financial resources are needed to fund promotional campaigns, offer incentives to travellers, and invest in tourism infrastructure and facilities. Additionally, one of the government officials key informants stated that a ‘savings culture’ be promoted so that people can save to travel.
- Capacity constraints: the tourism industry may lack the capacity and expertise to implement some of the proposed activities and programmes, particularly in the areas of technology and sustainability. This includes coordination and collaboration capacity given that the successful

implementation of the Domestic Tourism Scheme and Domestic Tourism Recovery Framework will require effective coordination and collaboration among multiple stakeholders, including government, tourism businesses, and local communities, which could be challenging to achieve. Skilled human resources are needed to plan, execute and manage tourism promotional campaigns, provide high-quality services to travellers, and ensure a positive visitor experience.

- Raising awareness and ensuring buy-in from stakeholders: some tourism businesses and communities may be resistant to change, particularly if it involves significant changes to their operations or way of life and resource investments, which could pose a challenge to the implementation of some of the proposed activities and programmes. As one of the economic development key informants stated that the Scheme has “noble ideas and programmes but need active participation at the local level for implementation (product owners to buy-in – it is those product owners who will want their facilities to be part of the project)”. Additionally, one of the government official key informants stated that the “biggest challenge would be communication and making sure your clientele knows about these schemes, how they work and how to access them”. Innovative technological resources, such as digital platforms, social media, and mobile apps, are needed to reach and engage with the target audience effectively, provide personalised services, and enable seamless transactions and experiences. Furthermore, collaborative resources, such as partnerships and networks between public and private stakeholders, are needed to promote cooperation and coordination, share information and resources, and build consensus and support for tourism development. Getting buy-in from other departments to deal with key challenges noted earlier (such as crime and infrastructure) was also raised. Also, as one of the research key informants noted, “since most stakeholders (including the tourism industry, tourism government officials and the general public) are not aware of the recovery framework or the Scheme, capacity challenges are likely to be experienced”.
- Irregularities and corruption: concern was raised that subsidies and allocating funds can create the conditions for corruption. As one of the research key informants stated that “caution should be exercised since this (subsidies) can cause corruption and misuse of funds - perhaps have clear criteria and transparent processes to make everyone involved accountable”. Relatedly, one of the economic development key informants stated “reservation on how the Scheme can be implemented given how we have managed tourism as a country and how we have interfaced at different spheres”. One of the business key informants stated that mechanisms need to be developed to prevent political interference. One of the restaurant owner key informants stated: “determining who is eligible for financial support and the allocation of government funding can

be perceived as being non-transparent, which can lead to distrust and cynicism among SMMEs and the wider public (corruption)”.

- Monitoring: a key challenge identified by one of the government official key informants is how to track activation, that is the number of persons that benefitted from the Scheme and travel behaviour once they are supported to travel. Up-to-date and accurate information resources are needed to provide travellers with relevant and timely information about tourism products, services, and destinations, and to facilitate their travel planning and decision-making. One of the economic development key informants asserted that “we have not improved our business intelligence to focus not only on products but also experiences. Inability to evaluate the market”.
- Regulatory and policy constraints: the implementation of some of the proposed activities and programmes may require changes to existing regulations, policies and structures, which could be time-consuming and difficult to achieve.
- Dealing with disruptions: The tourism industry is currently facing significant uncertainty due to the ongoing COVID-19 pandemic as well as other forms of disruptions including climate change, economic recessions and technological changes that could affect implementation, which could pose a challenge to the implementation of the domestic tourism scheme and plan, particularly if there are further disruptions to travel and tourism activities. However, as indicated earlier, there are opportunities as well as outlined earlier.

There are several key stakeholders who play a critical role in ensuring the recovery and resilience of domestic tourism in South Africa (aligned to the stakeholder mapping :

- Government: The government is responsible for developing policies and regulations that support the growth of the tourism industry, as well as providing funding and support to tourism businesses and organisations. There was general consensus among the key informants and focus group participants that government (especially the National Department of Tourism led by South African Tourism) should take the lead in terms of raising awareness of and implementing the Domestic Tourism Recovery Framework and Domestic Tourism Scheme. South African Tourism is primarily “to encourage tourism businesses and facilities to offer some discounts where possible, but also to ensure that that information on the products that are available, especially for the local market are advertised accordingly and they reach the targeted population” (government official key informant).

- Tourism industry associations: Tourism industry associations play an important role in representing the interests of tourism businesses and advocating for policies that support the growth of the industry.
- Tourism businesses: Tourism businesses, including hotels, restaurants, and tour operators, are responsible for providing quality products and services that meet the needs and expectations of domestic travellers.
- Major tourism attractions: they need to work together and assist in creating opportunities and linkages with less established attractions.
- Key departments and industry players for integration and alignment such as then Department of Transport and the aviation industry to deal with transport infrastructural concerns.
- Local communities: Local communities play an important role in creating a welcoming and inclusive environment for domestic travellers, as well as providing unique cultural experiences and attractions.
- Non-governmental organisations (NGOs)/ donors: NGOs play a critical role in promoting sustainable tourism practices, supporting local communities, and advocating for responsible tourism.
- Consumers: Domestic travellers are a key stakeholder in the tourism industry, as they drive demand for tourism products and services and provide feedback on the quality of their experiences.

Overall, the recovery and resilience of domestic tourism in South Africa require collaboration and cooperation among a wide range of stakeholders, including government, tourism industry associations, tourism businesses, local communities, NGOs, and consumers. A few of the key informants advocated for a needs analysis to better understand each stakeholders interests and contributions. This exercise would also entail clarifying “the roles and responsibilities of the different role-players” since “it seems to be unclear as to who will provide the resources for such an important but ambitious initiative, especially when government and private sector funding is limited in the context of economic recessions and still dealing with the pandemic and other socio-economic challenges, including the energy and unemployment crises” (researcher key informant”. Similarly, one of the economic development key informants stated that “this orchestra for it (the Framework and the Scheme) to reflect harmony and rhythm will need to recognise that the different players will play different roles, but there is a need a conductor (the National Department of Tourism)”. While there was general consensus that the Department of Tourism should be



responsible for coordination the implementation of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme, one key informant differed advocating for “a third party, independent of government/ government organisation or any tourism-related organisation” to be the lead implementing agency. Additionally, a few focus group participants preferred the private sector taking the lead with one stating that the implementation should be a collaborative effort.

#### **9.4. Communication of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme to the general public and key stakeholders**

The importance of communication, specifically to raise awareness, has been highlighted previously and has been integrated into this report as an expansion of the Domestic Tourism Recovery Framework in relation to the development of an awareness and communication framework (Section 11). In summary, the key informants and focused group participants noted the importance of multi-pronged approaches for targeted communication and awareness raising. The use of a range of mediums were noted, with differences noted in the responses on what are the main mediums to use with television, radio and social media/ internet being the most prominent. There are significant changes in the way people consume information and the traditional ways of advertising are no longer effective. One of the government key informants advocated for focusing on mini-documentaries to tell stories and share experiences.

The value of having a targeted communication approach is that it is more effective, relevant, increase efficiency, responds to differentiation and promotes sustainability. These aspects are elaborated on in Section 11. Similar stakeholders identified in terms of playing a critical role in ensuring the recovery and resilience of domestic tourism in South Africa were identified, noting the need to focus on the supply-side stakeholders to get buy-in and support (as well as provide support to particularly SMMEs so that they are well positioned to respond to domestic tourism demand), while the general public should be targeted as the key stakeholders to encourage domestic tourism consumption. One of the research key informants stated “the content and medium used for communication must be stakeholder specific, as much as possible, for example, mediums which may be suitable for CEOs and managers at large tourism industries may not be suitable to the average tourist”, adding that “a summarised version of the key points from the Domestic Tourism Recovery Framework and the Domestic Tourism Scheme can be made into an infographic, which is shared on social media platforms, such as Facebook and on tourist booking sites”. Similar sentiments was expressed by one of the restaurant key informants who stated developing

“Develop a clear and concise message that clearly explains the goals and objectives of the programme, the target segments, and the benefits to be gained”.

In Section 11, the key strategies are identified that include multi-channel approaches, partnership and collaboration, engagement with influencers, showcasing authentic experiences, highlighting safety measures and leveraging digital marketing. To ensure that differentiated and targeted marketing are considered, strategies for the three main target groups of the Domestic Tourism Scheme are proposed, specifically persons from poor income groups, persons with disabilities and the youth.

The messaging is key and there were concerns raised that the content is generally too generic and lacks sufficient depth and information for viewers/ consumers to act or follow-up. Thus, targeted, catchy and updated messaging was highlighted. Additionally, one of the government official key informants emphasised the need to the messaging to be visually pleasing, not only to capture attention but to also focus on those individuals who may struggle to read. This was also supported by one of the hospitality key informants who stated that “a visual message is easier to communicate and is received better by the target market”. Consideration of language when targeting historically disadvantaged groups was noted.

The Department of Tourism (specifically South African Tourism) and other tourism marketing and communication agencies (including Brand South Africa) from the national levels were deemed to be primarily responsible for raising awareness and implementing the communication framework.

## **9.5. Training and capacity development issues**

Similar to the awareness and communication sub-section above, Section 12 provides a more detailed examination of aspects pertaining to domestic tourism training and capacity development. To support domestic tourism in South Africa, the following types of training, skills development and capacity development are needed, as identified by the key informants and focus group participants:

- Customer service: training in customer service is essential to ensure that tourism service providers, such as accommodation facilities, restaurants, and tour operators, deliver high-quality services that meet or exceed visitor expectations. While many tourism service providers offer good customer service, there is a need to enhance the quality of customer service and provide more personalised and memorable experiences. One of the government key informants, as noted earlier, emphasised the importance of focusing on experiences rather than products.

- Domestic tourism product development: training in domestic tourism product development can help tourism businesses and entrepreneurs to create innovative and appealing products that meet the needs and preferences of domestic travellers.
- Marketing and advertising (including digital marketing and social media): training in marketing (specifically) digital marketing and social media can help tourism businesses and entrepreneurs to leverage traditional and digital channels to reach and engage with the target audiences more effectively and to increase their visibility and competitiveness. Many tourism government departments, businesses and entrepreneurs lack the necessary marketing and digital literacy skills to effectively use traditional and digital tools and platforms to promote their products and services and engage with customers. One of the government official key informants referred to including training on the online platform where information for the Domestic Tourism Scheme would be uploaded.
- Sustainability and responsible tourism: training in sustainability and responsible tourism can help tourism service providers to reduce their environmental impact, contribute to local communities, and promote ethical and socially responsible business practices. Many tourism businesses and service providers lack knowledge and understanding of sustainability and responsible tourism principles and practices, and there is a need to provide training and support to enable them to adopt more sustainable and responsible business practices. Customers/ tourists should also be exposed to more environmentally-friendly ways to participate in tourism activities and consume tourism products. One of the researcher key informants stated that the focus should be on broader sustainability issues (going green and being environmentally responsive). The focus on a greener tourism economy was also supported by one of the accommodation establishment key informants to “bring together science, ecology, local businesses/ vendors, communities and other stakeholders to work towards a cleaner economy”.
- Health and safety: in the context of the COVID-19 pandemic, training in health and safety protocols are crucial to ensure that tourism businesses and service providers comply with the regulations and guidelines to prevent the spread of the virus.
- Entrepreneurship and business management: There is a need to provide training and support to tourism entrepreneurs and small business owners to develop their business and management skills, and to enhance their competitiveness and sustainability. The media key informant noted that business owners in particular needed financial training. One of the restaurant key informants stated “Industry training may be needed to help SMMEs in the tourism and hospitality industries

to better understand the program, the benefits to be gained, and how to access support”. The economic development key informant emphasised the importance of focusing on business intelligence.

- Cultural and diversity awareness: There is a need to provide training and support to tourism service providers to enhance their cultural and diversity awareness, and to enable them to offer inclusive and welcoming experiences to visitors from different socio-economic backgrounds and cultures; critical for the implementation of the Domestic Tourism Scheme.

The researcher key informant stated that the focus of the training should not only be on the what but on the how: “how to achieve more competitive rates, how to achieve effective communication, how to create partnerships, and how to sustain the tourist tourism industry is important”. Additionally, one of the accommodation establishment key informants also noted the importance of training in communication skills.

The training can be provided by various organisations, such as government agencies, industry associations and business leaders, academic institutions, and private training providers. The training providers should have the relevant expertise, knowledge, and experience in the respective training areas, and should be able to deliver training programmes that are practical, relevant, and accessible to the target audience. Moreover, the training providers should work closely with the tourism industry and other stakeholders to ensure that the training programmes are aligned with the needs and priorities of the industry and the country.

#### **9.6. Feasible and appropriate indicators to monitor and evaluate the implementation of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme**

Some feasible and appropriate indicators to monitor and evaluate the implementation of the Domestic Tourism Recovery Framework and the Domestic Tourism Scheme in South Africa identified by the key informants and focus group participants is included in Section 13. These include indicators in relation to:

- Domestic tourists
- Economic impacts
- Domestic Tourism Scheme
- Safety and security
- Training

- Media and communication monitoring
- Sustainability

Feasible and appropriate indicators link to supply and demand-side aspects of domestic tourism. A more detailed monitoring and evaluation approach for domestic tourism is outlined in Section 13.

## **10. Revised Domestic Tourism Recovery Framework based on stakeholder engagements**

There was support for the development of the Domestic Tourism Recovery Framework by the key informants and focus group participants. Thus, the Framework remains largely unchanged from that proposed during Phase 1. However, it has been updated based on the engagements with the key stakeholders.

### **10.1. Purpose for developing a strategic framework for reigniting domestic tourism**

This section aims to create a comprehensive framework for domestic tourism recovery based on evidence from the desktop study and primary data analysis. The Framework will guide the engagement and implementation of Phase 2 of this project. Like the SMME study (Department of Tourism, 2021) submitted to the Department of Tourism, this Framework will also support the Tourism Sector Recovery Plan and the Economic Reconstruction and Recovery Plan (South African Government, nd). These plans follow a three-phased approach: Engage and Preserve, Recovery and Reform, and Reconstruct and Transform. The primary purpose of the Framework is to guide the transition of the domestic tourism sector from its traditional industrial model focused on production and consumption to a more sustainable ecosystem-based operational model (Selen and Ogulin, 2015). This shift is crucial to ensure the long-term success and resilience of the domestic tourism industry in South Africa. The Framework is developed based on a rigorous analysis of available data, including information gathered from primary research.

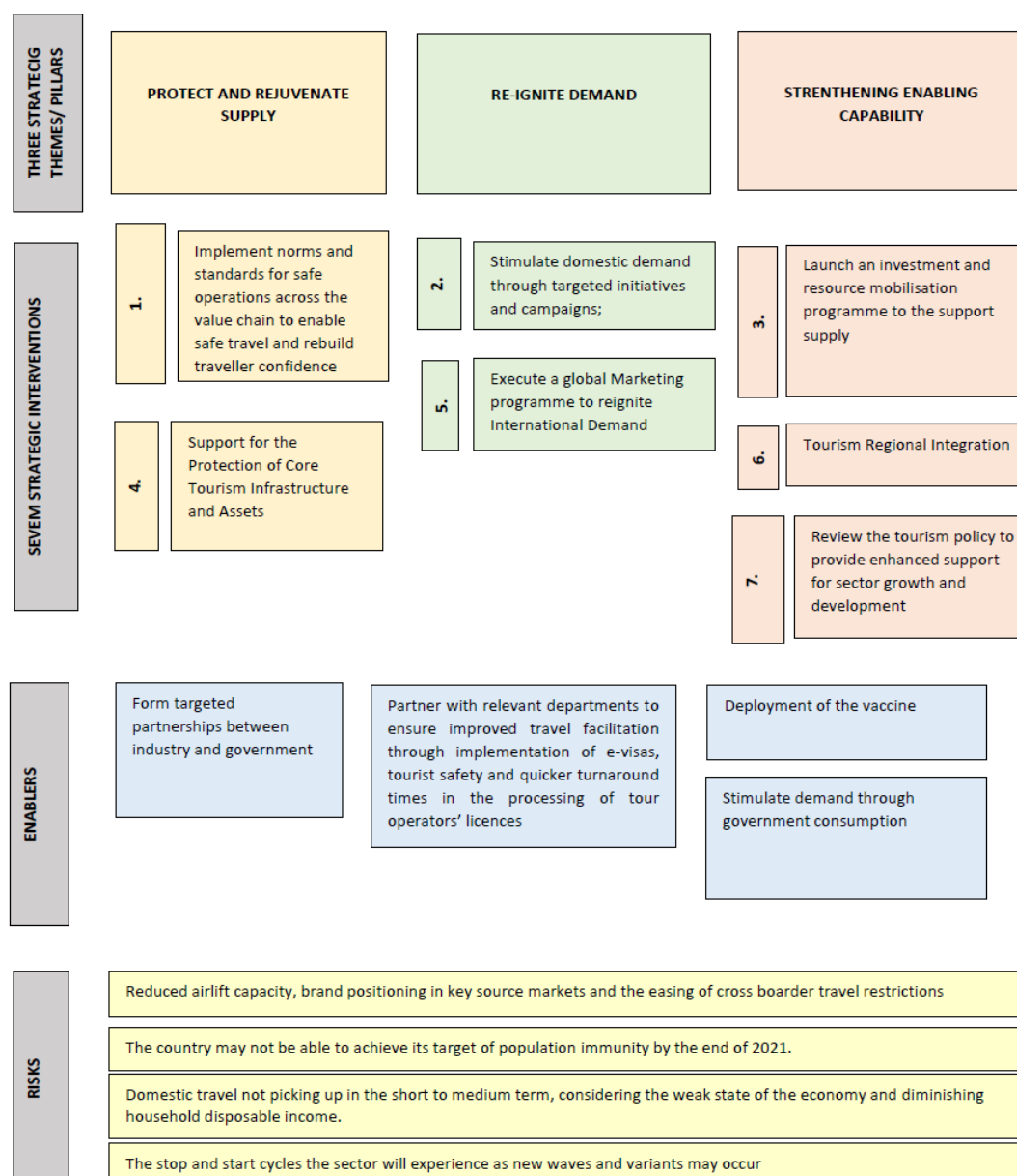
The evidence-based approach used in this Framework ensure that it is grounded in reliable data and that it accurately reflects the current state of the domestic tourism sector. The Framework also provides a clear roadmap for stakeholders involved in the domestic tourism industry, helping to align their efforts towards common goals and objectives. The Framework is designed to support engagement and collaboration between stakeholders and facilitate effective implementation.

## 10.2. Scope of Framework

The Framework draws on tourism best practices locally and internationally (Pollock, 2012) and the theory on business operational models (Bocken and Geradts, 2020; Zott et al., 2011) to show how to create an enabling business ecosystem within which its occupants (domestic tourism businesses and domestic tourism travellers in this case) can operate as a community to build individual and systemic resilience and agility. The Framework provides guidance on how to move domestic tourism from a position of recovery to one of resilience through a process of reigniting, which is encapsulated as a process of sustainable regrowth by re-evaluating, reconfiguring, responding and stimulating domestic tourism demand.

The proposed Framework draws from the tourism recovery strategy developed for the tourism sector (Figure 3) (Department of Tourism, 2021). Similarly, this Framework uses a 3 phase recovery approach to characterise the domestic tourism sector which will reveal strategic leverage points for reigniting the sector. In relation to domestic tourism, a key aspect that needs to be underscored from the tourism sector recovery approach is the centrality of domestic tourism to reignite demand, specifically the need to 'catalyse domestic demand'. This Framework also captures the importance of addressing key concerns among the general public and tourism service providers to promote domestic tourism such as safety and health considerations as well as a better understanding and targeting market segments via product diversification and incentives/ packages. Furthermore, broader enabling conditions (emerging from the survey findings as well) are noted that include the need for private and public sector partnerships, infrastructural improvements and development and investments in the sector.

**Figure 3: Overview of South Africa's Tourism Recovery Strategy (Department of Tourism, 2021: 25)**



The proposed Framework draws on the tourism recovery strategy by encouraging a phased approach to reignite the domestic sector through:

- Phase one: Stabilising and supporting domestic tourism supply.
- Phase two: Encouraging and enhancing strategic partnerships to address demand and marketing of domestic tourism products and offerings
- Phase three: Establishing relevant support that will transition towards resilient and sustainable growth of the domestic tourism sector.

### **10.3. Rationale for framework proposed**

As businesses around the world increasingly adopt modular structures and grow, understanding entity relationships and how the decisions or actions of one entity can impact a system and its interrelated entities becomes a major challenge. This is particularly true for the domestic tourism sector, where stakeholders are heavily reliant on one another and ignoring interactions can lead to unexpected and potentially undesirable outcomes. To rehabilitate a system and ensure future resilience, it is important to first systematically characterise the business ecosystem or network and analyse potential disruptions on demand and business decisions of different entities within the network. This forms the basis of the proposed framework.

The literature review and survey results serve as the first layer of ecosystem characterisation in this Framework. The survey data reveals that in the South African domestic tourism ecosystem, entity functions and activities often overlap, and some entities have adapted to reduced demand during the pandemic. However, the sector is subject to high levels of competition in a resource-limited environment. Resource limitation can lead to competition within an ecosystem, potentially leading to mortalities. However, with the ability to reconfigure itself, the system can re-grow sustainably and respond better to future disruptions, making it more resilient. Characterising the ecosystem and analysing disruptions on demand and business decisions are critical steps in developing a resilient business ecosystem. By understanding the interrelationships and dependencies within the system, stakeholders can better prepare for and respond to disruptions. The Framework proposed here will help stakeholders in the domestic tourism sector make informed decisions about how to reconfigure the system to improve its response to future disruptions. Ultimately, this will ensure the long-term success and resilience of the domestic tourism industry in South Africa.

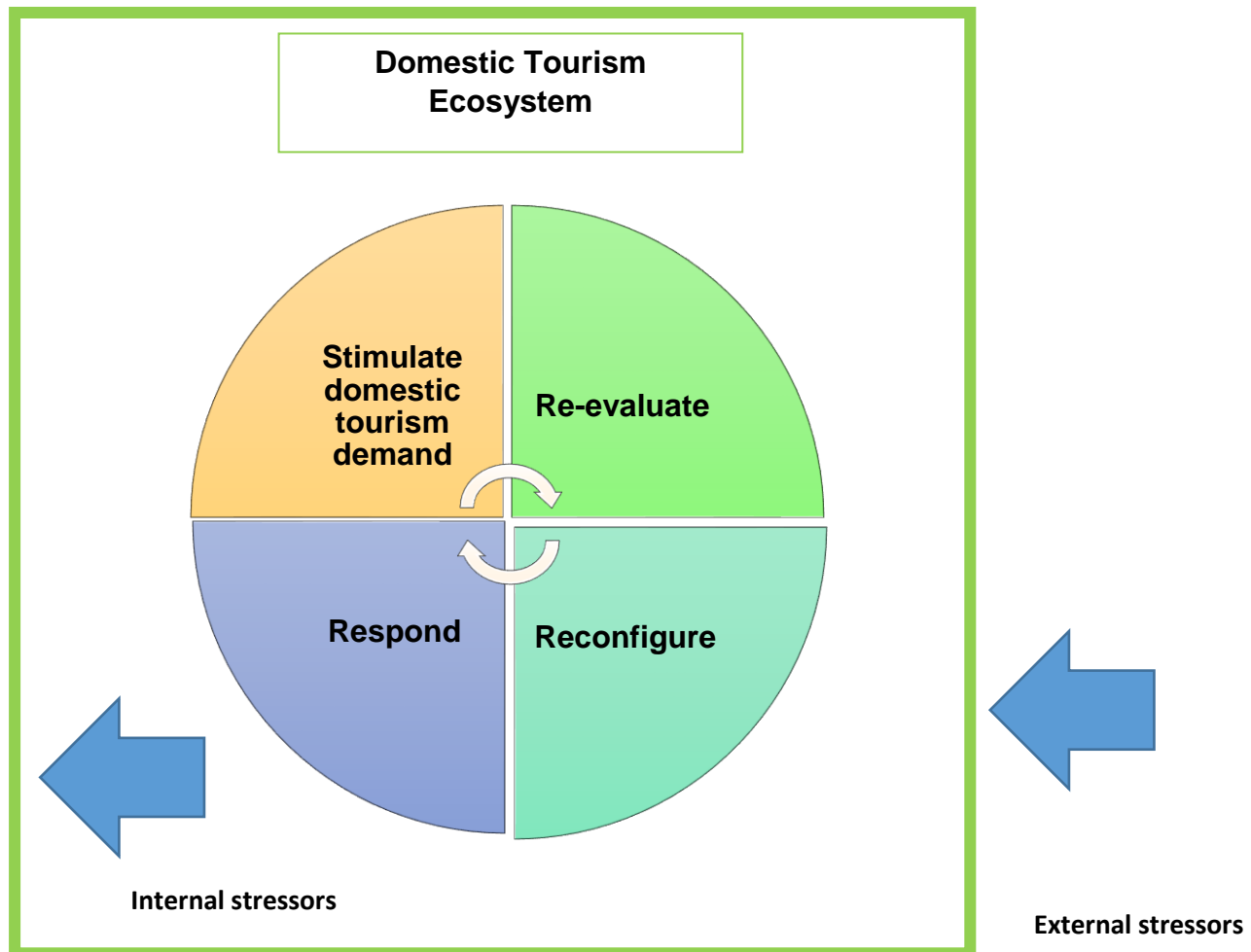


With regards to the South African domestic tourism sector, a lot of effort has been put into growing the domestic tourism sector largely in response to addressing the social and economic inequities of the past. To this end, the sector has grown and diversified in terms of geography tremendously over the past two decades (Rogerson and Visser, 2020). However, whilst the sector has been assisted in terms of growth (size) the pandemic has raised questions about whether the sector has been sufficiently capacitated in terms of reading changes to tourism patterns and responding to these (Rogerson and Rogerson, 2021). In the natural world, an organism's ability to respond to a changing environment is governed by its ability to sense (evaluate) change and adapt its form and/ or function (reconfigure) to survive (regrow).

The Framework developed here (Figure below), therefore, incorporates two key steps the domestic tourism sector must take to adapt to (respond) to the internal and external stresses brought about by the pandemic, namely re-evaluate and reconfigure. Furthermore, it illustrates that if this response does not further deplete resources (that is, it is sustainable), the ecosystem can regrow.

This ecosystem-based operational model proposed here (Figure 4) has found support across many business sectors (Baghbadorani and Harandi, 2012; D'Souz et al., 2015) and has even been touted to be an approach to improving strategic alignment (Selen and Ogulin, 2015) and promoting sustainable competitiveness (Morant-Martínez et al., 2019) across a tourism business ecosystem.

**Figure 4: Framework for shifting domestic tourism sector to an ecosystem-based operational model for the purposes of sustainable regrowth (reignition)**



The results and literature strongly indicate the diversity that characterises the domestic tourism sector. This includes a wide range of potential domestic tourist and destination profiles, as well as product offerings. Furthermore, the sector's mix of formal and informal activities makes it particularly challenging to monitor and accommodate. In this context, the "leave no one behind" approach holds significant importance. However, achieving this approach is difficult due to the sector's diversity, varying levels of vulnerabilities, and differing abilities to cope with change. These issues are also evident in the SMME study (Department of Tourism, 2022b).

In light of this, the suggested Framework to reignite the domestic tourism sector needs to focus on the following:

- Understanding and creating incentives to support and encourage domestic tourism demand
- Facilitate greater representation and participation of the broad spectrum of stakeholders with an interest and involvement in promoting domestic tourism
- Accommodate and respond to socio-economic, environmental and geographic diversity in relation to domestic tourism
- Facilitate pandemic recovery and sector resilience, especially among tourism businesses and service providers so that the supply-side component of tourism is prepared for and responsive to domestic tourism demand
- Transition to sustainable and equitable practices that are embraced by both the general public and tourism service providers evident in this study
- Support pandemic recovery and economic growth by stimulating domestic tourism
- Enhance governance and regulatory systems to effectively support domestic tourism efforts

Specific approaches and measures of the approach are discussed below.

#### **10.4. Four steps supporting domestic tourism reignition**

The steps defined in this section are based on the multiple types of evidence collected during the data collection phase and literature reviewed that form the framework for reigniting the domestic tourism sector: re-evaluate, reconfigure, respond and stimulate domestic tourism demand (sustainably).

##### **A. Re-evaluate**

This step involves re-evaluating the culture, competitiveness, resilience and sustainability of the domestic tourism sector. Individual businesses and organisations that are focused on domestic tourism should also be capacitated to undertake this re-evaluation. To illustrate how important this step is, a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis (Table 1), emanating from the literature reviewed and the survey findings, was undertaken. This highlights the existing capacity and capabilities in the tourism ecosystem to support domestic tourism as well as weaknesses and threats that need to be considered and addressed when reigniting domestic tourism in South Africa.

**Table 1: SWOT analysis of domestic tourism in South Africa**

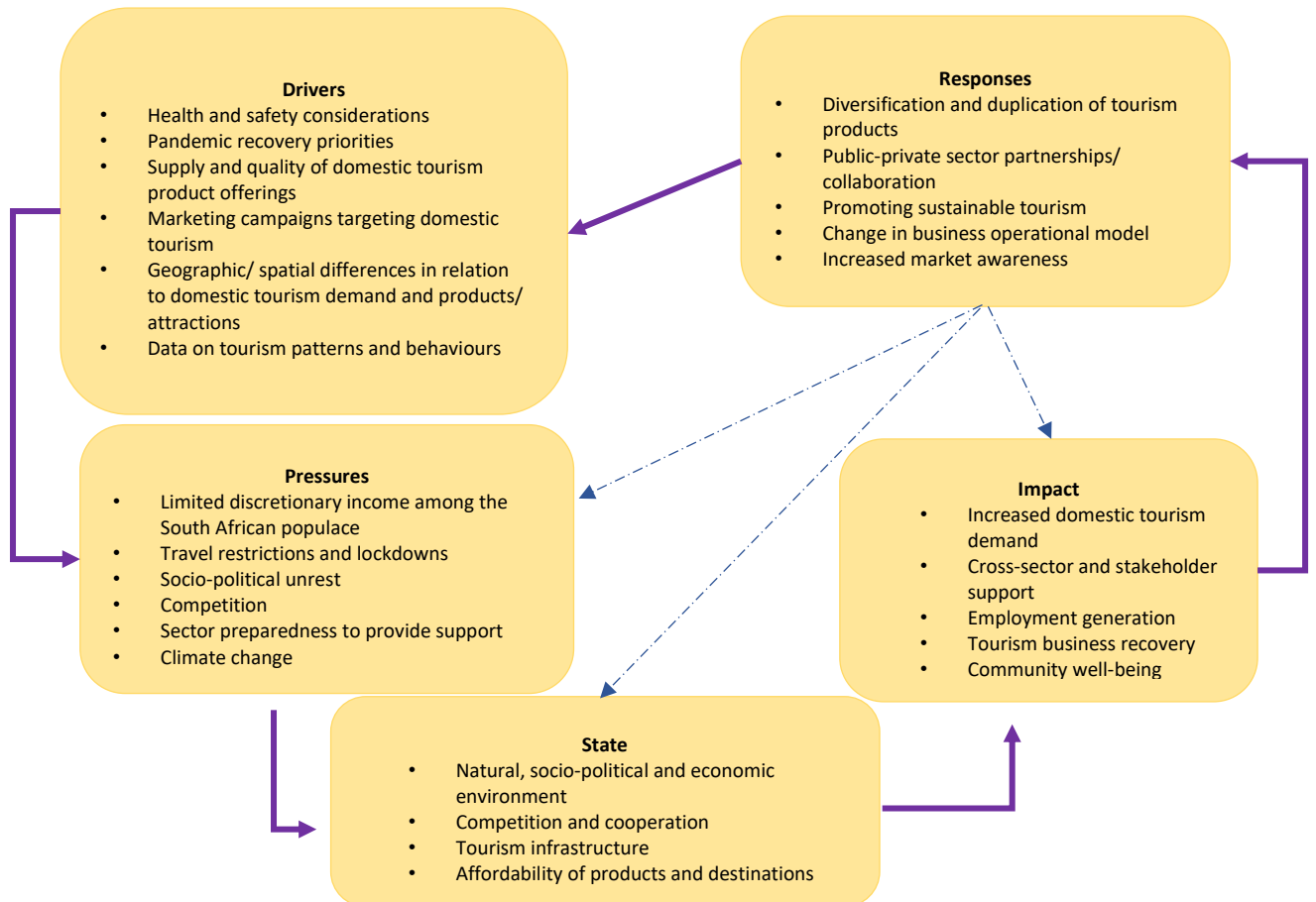
STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>• Diverse and well-established tourism products and services</li> <li>• Sufficient tourism infrastructure (including accommodation facilities, restaurants, retail establishments, etc.)</li> <li>• Local demand for tourism products with high levels of awareness of specific tourism products</li> <li>• Discretionary income potential among specific groups (and pent-up demand in this group)</li> <li>• Youthful populations and households that exhibit higher levels of willingness to travel</li> <li>• Well-established and active tourism organisations/ departments in the private and public sectors that function from local (municipal) to national levels</li> <li>• Some (although limited) funding and support available to assist tourism service providers</li> <li>• Domestic travel incentives</li> </ul>	<ul style="list-style-type: none"> <li>• Existing domestic tourism market is relatively small compared to the size of the South African population due to high levels of poverty and low disposal incomes</li> <li>• Ailing infrastructure (including transport, energy, internet connectivity and water provision) that undermines tourism experiences and the ability to effectively market destinations</li> <li>• Tourism facilities (such as accommodation, restaurants and transport) at destinations are geared to cater for international tourism and are over-priced for general local consumption</li> <li>• Tourism products and experiences are regarded as expensive for local consumption (linked to pricing for an international market)</li> <li>• Poor and ineffective marketing of domestic tourism products</li> <li>• Limited access to domestic tourism information</li> <li>• Limited domestic use of tourism products and services</li> <li>• Limited support for and focus on domestic tourism</li> <li>• Pricing policies</li> <li>• Safety and security responsiveness</li> <li>• Lack of climate proofing/ limitations to transition to green economy</li> <li>• Lack of universal accessibility</li> <li>• Discriminatory practices</li> </ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>• Domestic mobility (including visiting friends and family) is widespread</li> <li>• Pent-up demand</li> <li>• High levels of willingness to travel</li> <li>• Length of stay is relatively high</li> <li>• Potential to convert day visitors and 'staycationers' to overnight visitors with the right domestic travel packages</li> <li>• General economic recovery is underway, thus potential for increasing spend on travel and leisure</li> <li>• Market segmentation discernible that can inform targeted marketing</li> <li>• Potential to diversify tourism products and offerings for the domestic market</li> <li>• Transitioning to a green economy/ increasing</li> </ul>	<ul style="list-style-type: none"> <li>• Competing with international tourism markets (and internal competition that undermine alignment and integration)</li> <li>• Domestic tourism alone (without international tourism) is unlikely to sustain many tourism service providers</li> <li>• Safety and security considerations (worsened by the recent social unrest)</li> <li>• Financial barriers/ limitations to travel</li> <li>• Seasonal fluctuations</li> <li>• Changes in consumption patterns in eventing and conferencing (for example, virtual meetings and conferencing)</li> <li>• Limited capacity for job creation and economic growth affects both the demand for and supply of tourism products and services</li> </ul>

<ul style="list-style-type: none"> <li>• focus on sustainable tourism</li> <li>• Changes in travel behaviour</li> <li>• Implementing the Domestic Tourism Scheme</li> <li>• Digital/ technological changes</li> </ul>	<ul style="list-style-type: none"> <li>• Continued COVID-19 pandemic disruptions and legacy impacts</li> <li>• Other disruptions (such as economic recessions and natural disasters associated with climate change)</li> <li>• Fuel prices</li> <li>• Airline industry prices and unreliability</li> <li>• Pollution and litter/ grime</li> <li>• Reputation and image (relatedly governance and corruption challenges)</li> <li>• Disruptions to training</li> </ul>
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### ***B. Reconfigure***

This step involves enabling businesses within the sector to reshape their own culture, change their operational model and reposition themselves in the ecosystem, to reduce competition, increase resource availability and be responsive. This will also involve guiding businesses to look outward at the responses of domestic tourism sectors in other countries to the stressors brought about by the pandemic as well as be geared towards responding to domestic tourism demand and travel preference changes. Fundamental to reconfiguring and changing the operational model of a business is the understanding of the current status quo. The DPSIR model (Figure 5) can provide a more holistic understanding of how the domestic tourism ecosystem responds to different drivers and pressures, particularly if the current conditions (COVID-19 pandemic) extend for prolonged periods into the future. The DPSIR used to establish causal links in an integrated system, may allow for the identification of suitable factors to leverage in an attempt to strategically reposition a business in the ecosystem.

Figure 5: DPSIR model for domestic tourism (adapted from Wei et al., 2007)



The results of this study highlight the significance of recognizing that the revival of the domestic tourism sector is contingent on understanding tourist patterns and behaviours. The proposed framework acknowledges that the decision to travel is influenced by various external and internal motivators. As such, efforts to stimulate the sector must consider the two domains that impact travel patterns and behaviours. Table 2 illustrates the external and internal domains that affect travel. Factors such as the socio-demographic profiles of potential travelers, health and safety, affordability, and the quality of tourism experiences have a substantial impact on decision-making processes.

**Table 2: Internal and external factors influencing domestic tourism travel behaviour**

Domain	Factors	Measures
<b>External (System)</b>	Health and safety	Risk and exposure Access and availability of medical support and services Pandemic responses and regulations
	Tourism competitiveness	Supply of products and offerings Marketability Marketing strategies Affordability
	Geographic location	Provincial Urban, rural and township
	Natural disasters and climate	Nature and duration of disruptions Frequency of occurrences Disaster management and response
	Economic stability	Economic recovery Exchange rates Inflation
	Social unrest and conflict	Safety and security responses Crime prevention and monitoring
<b>Internal (Domestic tourist)</b>	Socio-demographic	Gender Employment status Income Age Marital status and family size Level of education
	Attitudes and perceptions	Level of awareness Expectations
	Mobility	Physical and virtual Physical health and well-being (including disability status)
	Behaviour	Willingness and intention to travel Willingness to pay Wants and needs

The amount and quality of information available can also affect the decision to travel. One potential intervention for facilitating the reconfiguration of the domestic tourism sector is the implementation of a domestic tourism reignition awareness campaign. This campaign should be informed by best practices within the sector and the use of both local and international case studies. An effective communication and engagement framework, inclusive of all stakeholders, is crucial for the success of this campaign and will be discussed in more detail later.

In parallel, training will be an important and critical component of building resilience among domestic tourism service providers to also be effective to attract and provide positive experiences for local travellers. There is a need to identify the type of training required as well as who should be targeted and

potential service providers or collaborative partnerships with institutions to undertake the training. Key areas of training have been identified in the SMME report for tourism businesses that can be extended to tourism service providers. A skills development and training framework is discussed in the next section.

### ***C. Respond***

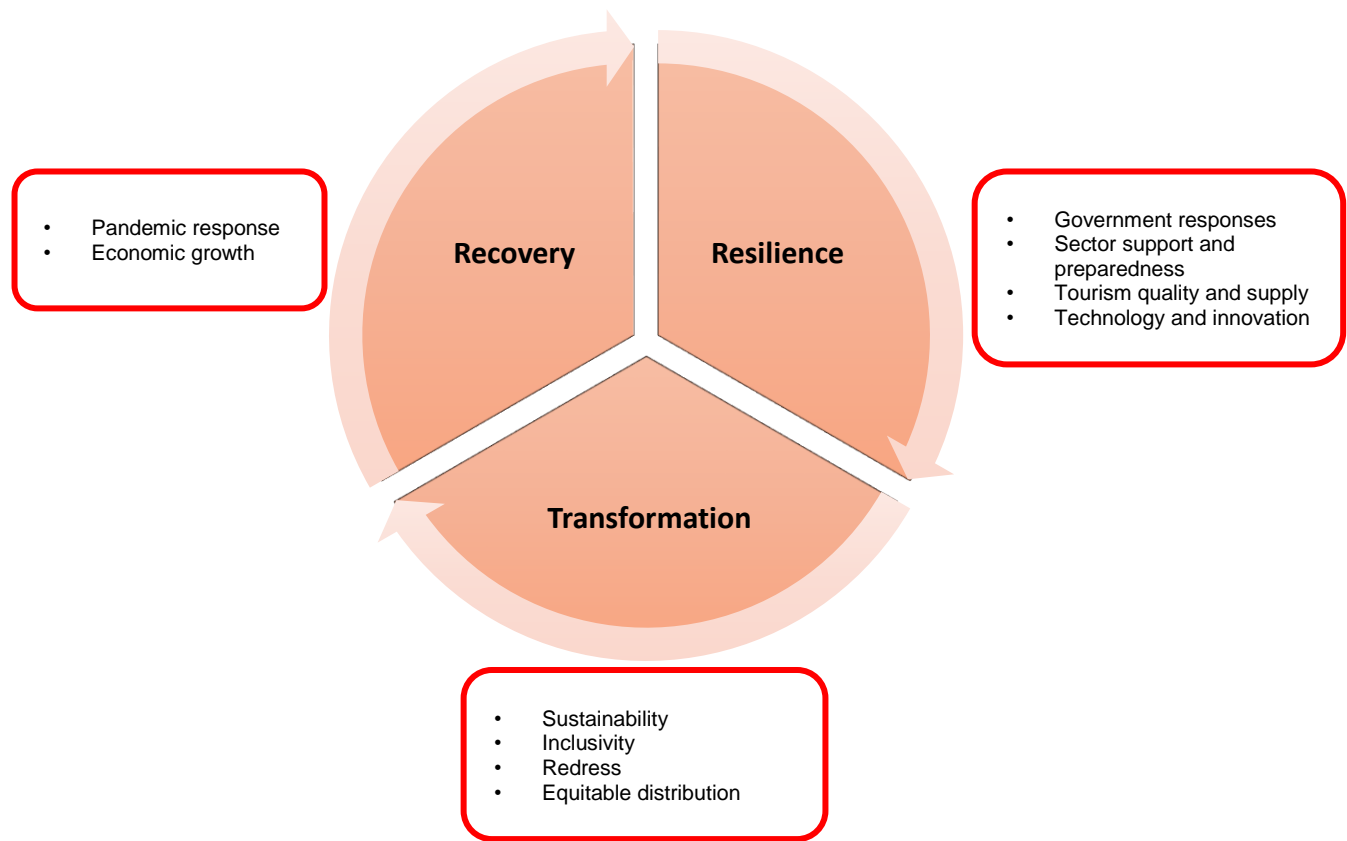
This step involves enabling tourism supply-side service providers (including businesses, tourism marketing agencies, tourism government departments, etc.) within the ecosystem and the sector as a whole to respond to the stressors (internal and external) by adopting interventions (tools and measures) that promote resilience and responsiveness in relation to domestic tourism. In this regard, the aspects that need to be paid attention to elaborated in the SMME report (Department of Tourism, 2022b) should support domestic tourism efforts. In particular, key aspects identified were:

- Co-designed participatory processes that include relevant domestic tourism stakeholders.
- Dynamic capabilities that “specialise in the adaptation of organisational traits towards an inclusive, sustainable, and multi-stakeholder enterprise model” (Zollo et al., 2016 cited in Aldianto et al., 2021: 4).
- Enhancement of technology capability that adequately understands and embraces technological changes to enhance their products, services and performance (Di Benedetto et al., 2008).
- Consideration of future knowledge stock can inform organisational learning and enables entrepreneurs to identify and take advantage of opportunities (Acs et al., 2009), in this case, tourism service providers to encourage and promote domestic tourism.
- Support innovation ambidexterity which embraces exploring new opportunities (Andriopoulos and Lewis, 2009).
- Alignment with existing policies, plans and strategies targeting domestic tourism.

Following the model proposed by Sharma et al. (2021) (Figure 6), responses to current disruptions are embedded in the need to promote transformation within the domestic tourism sector. Approaches to reignite the domestic tourism sector should actively redress historic inequalities and unsustainable practices that plagued the sector.



**Figure 6: Framework for response (adapted from Sharma et al., 2021: 8)**



#### ***D. Stimulating domestic tourism demand***

A critical component of a domestic tourism strategy is to stimulate domestic tourism demand since increased consumption is key to the economic recovery of the sector. Several aspects emerge in the literature and research results in relation to the key aspects that need to be considered:

- Health and safety (no immediate post-pandemic – in the context need to focus on building trust and confidence that the tourism service providers and products are capable of keeping customers safe)
- Innovation, resilience and sustainability
- Alignment to product demand
- Marketing and brand awareness
- Cost considerations and incentives

In order to reignite domestic tourism in South Africa, key aspects are identified and briefly discussed to inform the development of a marketing and promotion strategy to encourage and sustain domestic tourism in South Africa.

***Increasing and sustaining domestic tourism volumes (number of persons willing and able to travel)***

- Develop affordable tourism packages/ incentives targeting specific market segments, for example, the elderly/ retirees, families, those who are single, persons in specific locations desiring to participate in specific activities, etc. This study reveals the value of research to unpack how socio-demographic variables can assist in better understanding different potential markets within South Africa. As consumption of tourism products increases and 'normalises', it is imperative that the sector demonstrates a focus on domestic travellers by offering off-season packages to reduce seasonality, increase spending and continuously encourage domestic travel.
- Create more opportunities for domestic travel experiences by undertaking co-packaging (for example, events), specifically local events and attractions need to be supported for better marketing of domestic tourism activities.
- Create an enabling environment for more persons to travel in South Africa for leisure and tourism purposes by having special deals and supporting socio-economic development to reduce barriers/ constraints to travel. While beyond the scope of the tourism sector stakeholders, it is important to note that increasing earning capacity and job creation are essential to enhance access to discretionary income.

***Increase spending on domestic tourism products and services***

- Increase the use of existing tourism products/ attractions by converting day visitors and 'staycationers' to overnight stays and promoting travel within South Africa
- Develop new tourism products and/ or diversify existing product portfolios and attractions to encourage domestic travel and overnight stays, especially in relation to getting South African residents to spend on tourism products and activities. Visiting friends and family (a key motivation for domestic travel in South Africa) does, to some extent, contribute economically (spend on food and beverages, leisure activities, shopping, etc.) but does not support the accommodation sector and often there is limited consumption of tourism products and experiences. The consumption of tourism products and services needs to be encouraged and strengthened.

- Key tourism destinations and attractions are noted in relation to demand among South African residents. These need to be considered to ensure that local demand is met with local supply.

### ***Improved and targeted domestic tourism marketing***

- Re-energise and rethink current efforts to promote domestic tourism in South Africa. For example, South Africa's Sho't Left Campaign, intended to anchor the country's domestic tourism campaign and encourage a culture of travel is a 'tired' approach that needs to be re-energised and re-packaged. Different types of initiatives and interventions are required to target diverse market segments.
- Introduce new and innovative marketing campaigns that are targeted to different market segments and are sensitive to how people currently access information relating to travel options. The importance of technological advancements and digital platforms, in particular, have changed how people access information, how they want the information to be packaged and the interactive ways in which decisions are made (pricing, deals, bookings, etc.). The role of the internet and social media is particularly important to integrate.
- There is generally a high level of awareness of tourism products and attractions in South Africa among the general population (and an interest in participating in diverse activities and travelling to different provinces, although preference for the three tourism provinces is evident). Thus, a domestic tourism communication and marketing strategy should focus on translating awareness into consumption. There should be consideration of changes brought about by the COVID-19 pandemic impacts, including preferences on how to source information.
- The current domestic tourism communication and marketing strategies need to be revamped since it has not had a substantial impact on encouraging and sustaining levels of travel needed to support the economic recovery of the tourism sector.
- The conceptualisation, implementation and monitoring of a comprehensive and integrated domestic tourism marketing campaign are urgently needed that focuses on encouraging travel in South Africa under the current conditions.

The last component of the Domestic Tourism Recovery Framework is the monitoring and evaluation approach. The effective implementation of a Domestic Tourism Recovery Framework (including communication and marketing campaigns) requires the development of a monitoring and evaluation approach that outlines who should do what, by when and what is hoped to be achieved (that is, the intended or expected impact). A monitoring and evaluation approach permits indicators to be tracked

within stipulated timeframes, ensures that reporting is undertaken, assesses impacts, and informs revisions and adjustments. The monitoring and evaluation approach, including how the Theory of Change and Logical Framework approaches are used, is outlined later.

## **11. Domestic Tourism Awareness and Communication Framework based on the Domestic Tourism Recovery Framework**

The links between the economic impacts of COVID-19 and tourism are well established. South Africa's Tourism Sector Recovery Plan (Department of Tourism, 2021) highlights the urgent need to address these impacts and render the sector more resilient to future shocks. The qualitative research undertaken during this phase revealed that most stakeholders, including those within tourism-related government departments, were unaware of the various national strategies to encourage and support domestic tourism, including the Domestic Tourism Scheme. Specifically, engagement with stakeholders revealed low levels of awareness of the proposed Domestic Tourism Recovery Framework (developed during Phase 1) and the Domestic Tourism Scheme, and there were indications of insufficient buy-in from stakeholders.

The Tourism Sector Recovery Plan (Department of Tourism, 2021) identified tourism as one of the sectors economically vulnerable to measures taken both internationally and nationally to reduce the spread of the virus. Given that the tourism sector contributes significantly to the country's GDP, this has had detrimental impacts on the growth and well-being of tourism service providers and their employees – as evidenced by our engagements with stakeholders. In a number of these engagements, the need for a communication strategy designed to specifically enable/ scaffold the implementation of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme emerged as a strong recommendation. This motivated the development of the Domestic Tourism Awareness and Communication Framework, presented here, which has been designed to guide the communication-related aspects of awareness, education and training on the Domestic Tourism Recovery Framework and Domestic Tourism Scheme. This Framework aims to provide the tourism sector and its partners with short- and mid-term direction on how to utilise information on the performance of the sector, product offerings, customer needs and business opportunities strategically and effectively to contribute to recovery and eventually increased resilience of the domestic tourism sector. It draws from wide-ranging consultations with key stakeholders and provides guidance on how communication within the tourism sector can align with the government's

overall vision and core aims and objectives, most importantly, increasing its resilience and contribution to the country's economy.

The guidelines and recommendations contained in the Framework are evidence-based, drawing on primary and secondary data gathered during the stakeholder engagement process. The heart of the Domestic Tourism Awareness and Communication Framework focuses on setting goals and identifying stakeholder roles, setting out guiding principles, identifying and understanding audiences, message design, targeting stakeholders using appropriate communication mediums, and identifying communication barriers and mitigation measures. The Framework should be used to develop a strategy and an associated implementation plan, including an embedded awareness campaign, an approach for monitoring and evaluation and recommendations for supporting actions.

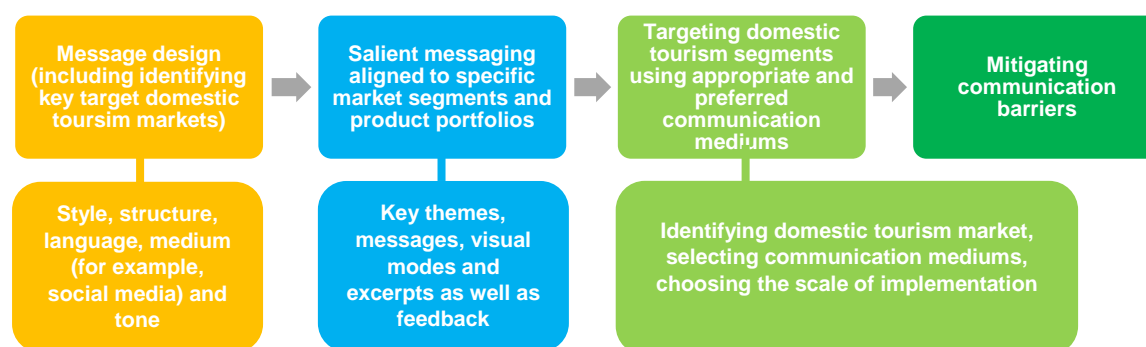
The situational assessment revealed that there are significant gaps in terms of stakeholder understanding of how the Domestic Tourism Recovery Framework and Domestic Tourism Scheme can help the sector recover from the pandemic and become more resilient to future shocks. However, based on existing policies, programmes, plans and communication strategies related to domestic tourism that exist within the country and internationally, there are approaches/ methods that could be adapted for the Domestic Tourism Awareness and Communication Framework. It was evident that, to date, coordination and communication regarding the Domestic Tourism Scheme and Domestic Tourism Recovery Framework by different government departments have been poor. The development of the Domestic Tourism Awareness and Communication Framework is a significant step towards improving this.

### ***The components and process flow for the strategy***

The Domestic Tourism Awareness and Communication Framework is organised around six key components: setting goals and identifying roles; identifying key audiences and understanding their needs/ preferences (that is, targeting stakeholders linked to the stakeholder mapping outlined earlier); developing key messages and testing these before using them at scale; identifying the most effective modes, methods and channels for communication of messages; and identifying ways to monitor and evaluate the impacts of the communications efforts. The latter includes identifying communication barriers and recommendations to address these. The implementation of the strategy, guided by the six principles, revolves around communication being cost-effective, outcomes-based and impactful/ memorable, having

target audience(s), using the best combination of communication tools, and being monitored simply and systematically. The Figure below outlines the key elements of this design process.

**Figure 7: Outline of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme Awareness and Communication Framework**



In terms of stakeholder roles, the national government and, more specifically, the Department of Tourism, supported by South African Tourism and Brand South Africa, must be accountable for the strategy and the implementation plan that will be subsequently developed. However, the private sector, specifically tourism businesses, should be responsible for operationalising the strategy with support from local government and international agencies. The strategy should essentially be a living document, and national government's role is to ensure that during the document's lifespan, relevant and capacitated departments and staff continuously act as a funnel to gather information through consultation and research that can be used by the sector to promote the goals of the strategy.

The key informants and focus group participants identified tourism businesses, the national government (specifically the Department of Tourism) and media stakeholders as being the most influential in delivering content and messaging. Tourism businesses, the national government, the media and local government are also the most influential in championing the messaging, that is, using their power and influence within the country to actively promote buy-in for the strategy and its messaging. In terms of prioritising target audiences for the Domestic Tourism Awareness and Communication Framework, tourism businesses and tourists are important, but all tourism stakeholders need to be targeted, including South African citizens and government departments. Other target audiences of particular importance are tourism funders/ donors.

An embedded awareness campaign encompassing actions that can promote awareness to encourage behaviour, decision-making and practices that support and sustains domestic tourism is important. The rationale behind embedding an awareness campaign in the Domestic Tourism Awareness and Communication Framework is that awareness-raising is widely regarded as one of the first stages of the adaptation process. In terms of message style, this campaign must emphasise visual communication. Messages structured as stories and real-life experiences may be more suitable than scientific research, facts and statistics. Additionally, it is important to frame the messages in languages that are easy to understand and at a level that the audience finds relatable, bearing in mind that this will be different for various stakeholder groups across the domestic tourism sector. The tone of the messages should portray optimism, connect with the audiences' core values and inspire them.

The selection of appropriate communication mediums for the dissemination of information for each stakeholder group is extremely important. The following platforms would be most applicable for the Domestic Tourism Awareness and Communication Framework: television, radio, social media, printed material, electronic media, community and social events, and websites. However, given the diversity of the country's population and the spatial heterogeneity of its tourist attractions and built and natural landscapes, it is important to be sensitive to the unique characteristics of each province. As such, a localised approach (in conjunction with national efforts) which targets each of South Africa's nine provinces (and specific communities and targeted groups), is suggested for the awareness campaign. The creation of a brand or brand identity for the Domestic Tourism Awareness and Communication Framework could also be a fundamental mechanism for enhancing communication, overcoming barriers, promoting the awareness campaign, and being a key driver of implementing the strategy. It should be noted that there are existing brands like Sho't Left that could be leveraged for this purpose.

The need for targeted approaches depending on the audiences is indicated below in terms of strategies for specific groups aligned with the Domestic Tourism Scheme's priority groups are presented as illustrative examples. To effectively communicate and market the Domestic Tourism Scheme in South Africa, the following strategies could be considered:

- Multi-channel approach: to reach a wider audience that could include traditional media channels such as television and radio, as well as digital channels such as social media, email marketing, and online advertising.
- Leverage digital marketing: digital marketing tools such as search engine optimisation, pay-per-click advertising, and email marketing can be leveraged to reach potential domestic tourists.

These tools can help to target specific demographics and geographic areas, as well as track and measure the success of marketing campaigns.

- Engage with influencers: engage with travel influencers and bloggers (as well as famous personalities) to promote the Domestic Tourism Scheme. They can help to create buzz and excitement around the Scheme, and can help to showcase the unique experiences and attractions that South Africa has to offer.
- Partnership and collaboration: work with key stakeholders such as tourism boards, travel associations, and other tourism-related businesses to promote the Domestic Tourism Scheme/ plan. Partnering with local businesses can help to create cross-promotional opportunities, package deals, and other special offers.
- Showcase authentic and unique experiences: these highlight the unique cultures, traditions, and history of South Africa. This can be done through engaging storytelling, photography and videography. Competitions and promotions can be linked to public submissions.
- Highlight safety measures: in the context of the COVID-19 pandemic, it is important to highlight safety measures being taken by tourism businesses to reassure potential visitors that they can travel safely. This includes promoting adherence to health and safety protocols, implementing social distancing measures, and providing adequate hygiene facilities.

The generic approach above needs to be adapted for specific target groups. To communicate and market the Domestic Tourism Scheme to persons from poor income groups specifically, the following strategies could be considered:

- Targeted advertising: Use targeted advertising to reach persons from poor income groups such as online advertising, social media platforms, or targeted television and radio advertisements.
- Partnerships with community organisations: partner with community organisations that work with persons from poor income groups, such as non-profit organisations, churches, or community centres. These organisations can help to spread the word about the Domestic Tourism Scheme and encourage participation through special promotions.
- Affordable pricing: make the domestic tourism experiences affordable for persons from poor income groups by offering special pricing, package deals, or payment plans.
- Local guides: use local guides to provide tours and experiences to visitors. This can help to create job opportunities for persons from poor income groups while also providing visitors with an authentic experience.



- Collaborations with local businesses: collaborate with local businesses in poor income areas to create cross-promotional opportunities, package deals, and other special offers. This can help to promote domestic tourism while also supporting local businesses.

To effectively communicate and market the Domestic Tourism Scheme in South Africa to persons with disabilities specifically, the following strategies could be considered:

- Accessible and appropriate information: provide accessible information about the Domestic Tourism Scheme, including accessible brochures, websites and other marketing materials that are suitable for persons with disabilities, noting that there are different types of disabilities that need to be accommodated. This should include information about accessible accommodation, transportation, and tourist attractions.
- Partnerships with disability Organisations: partner with disability organisations to promote the Domestic Tourism Scheme and provide support to persons with disabilities. These organisations can help to spread the word about the Scheme and provide information and resources to visitors with disabilities.
- Staff training: ensure that staff working in the tourism industry, especially those participating in the Scheme, are trained in disability awareness and customer service. This includes training on how to interact with persons with disabilities, how to provide accessible services, and how to assist with any disability-related needs.
- Accessible accommodation and attractions: ensure that accommodation and tourist attractions are accessible to persons with disabilities. This includes providing accessible parking, entrances, bathrooms, and other facilities. The undertaking of a universal accessibility audit may assist in developing a strategy to address the needs of persons with disability in the tourism sector.
- Assistive technology: provide assistive technology, such as hearing aids and wheelchairs, to visitors with disabilities. This can help to enhance their experience and make it easier for them to participate in tourist activities.
- Highlight the benefits: Highlight the benefits of domestic tourism for persons with disabilities, such as increased accessibility, social inclusion, and opportunities for personal growth and development.

To effectively communicate and market the Domestic Tourism Scheme in South Africa to the youth specifically, the following strategies could be considered:

- **Social Media:** use social media platforms, such as Facebook, Instagram, and Twitter, to promote the Domestic Tourism Scheme. This can include sharing photos and videos of popular tourist attractions, and highlighting special promotions and discounts available to youth.
- **Influencer marketing:** partner with social media influencers and bloggers (and famous personalities that have high youth followers) to promote the Domestic Tourism Scheme to the youth. These influencers can share their personal experiences and recommendations, which can be highly effective in engaging and motivating young people.
- **Mobile apps:** Develop mobile apps that provide information about the Domestic Tourism Scheme, including tourist attractions, accommodation, and transportation. These apps can also include interactive features, such as virtual tours and games, to engage and entertain the youth.
- **Youth events:** Organise youth events, such as festivals, concerts, and sports tournaments, that showcase the cultural and natural attractions of South Africa. These events can be used to promote the Domestic Tourism Scheme, and to encourage young people to explore their own country.
- **Youth travel agents:** partner with youth travel agents and tour operators to promote the Domestic Tourism Scheme to the youth. These agents can develop packages and itineraries that appeal to young people and can provide expert advice and guidance on travel planning.
- **Peer-to-peer recommendations:** encourage young people to share their travel experiences and recommendations with their peers. This can be done through online forums, social media groups, and other platforms that facilitate peer-to-peer communication.

To effectively communicate and market the Domestic Tourism Scheme in South Africa to the elderly, the following strategies could be considered:

- **Print media:** use print media, such as newspapers and magazines, to promote the Domestic Tourism Scheme. This can include articles and features that highlight special promotions, discounts, and benefits available to seniors.
- **Radio and television:** advertise the Domestic Tourism Scheme on radio and television stations that are popular among the elderly. This can include radio programmes and talk shows that focus on senior issues, and television programmes that showcase travel destinations and experiences.
- **Senior citizen centres and organisations:** partner with senior centres and organisations to promote the Domestic Tourism Scheme to the elderly. These centres and organisations can

provide information and resources to seniors, and can also organise group tours and travel packages that cater to their needs.

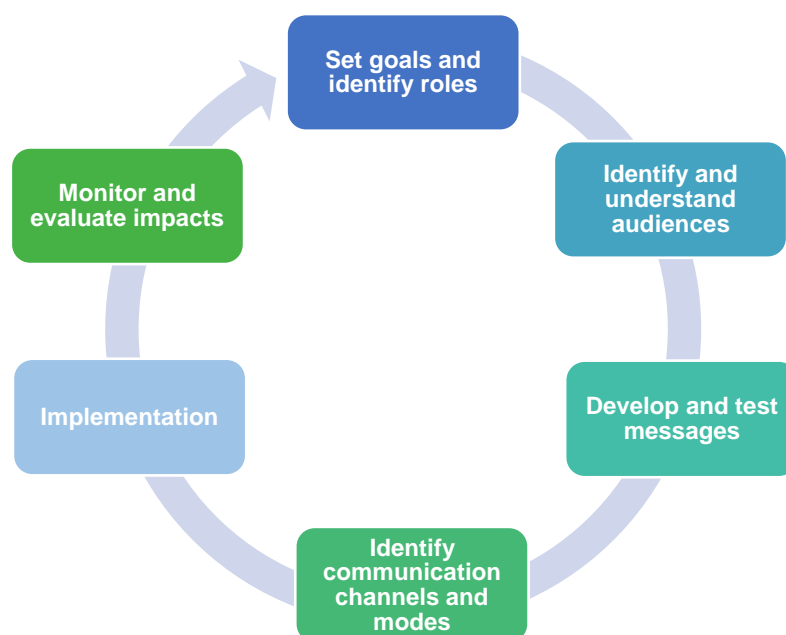
- Travel agencies: partner with travel agencies that specialise in senior travel to promote the Domestic Tourism Scheme to the elderly. Travel agencies have the capacity to create travel packages and itineraries customised to the distinct requirements and inclinations of older adults, as well as offer specialised recommendations and direction on travel arrangements.
- Referral programs: encourage satisfied senior travellers to refer their friends and family to the Domestic Tourism Scheme. This can be done through referral programmes that offer incentives and rewards for successful referrals.

A targeted communication and marketing approach for domestic tourism is essential for the following reasons:

- Relevance: ensures that the communication and marketing messages are relevant to the specific audience, addressing their unique needs, preferences, and interests. This helps to create a more personal and meaningful connection with the audience and makes them more likely to engage with the message.
- Effectiveness: increases the effectiveness of communication and marketing efforts, by focusing on the specific audience that is most likely to respond positively to the message. This helps to improve the return on investment of marketing and communication campaigns, and can lead to increased sales, bookings, and revenue for tourism businesses.
- Efficiency: also helps to optimise marketing and communication resources, by focusing on the specific audience that is most likely to convert into customers. This helps to minimise the wastage of resources on ineffective campaigns that fail to engage or resonate with the audience.
- Differentiation: helps to differentiate tourism businesses and destinations from competitors, by showcasing their unique offerings and value propositions that are relevant to the specific audience. This helps to create a competitive advantage and to attract and retain customers.
- Sustainability: helps to promote sustainable tourism development by ensuring that the benefits of tourism are distributed more equitably across different segments of society. This helps to reduce the negative impacts of tourism on the environment, culture, and society, and to promote more responsible and ethical tourism practices. These principles are embedded in the Domestic Tourism Recovery Plan and Domestic Tourism Scheme.

In summary, the strategy should be arranged around six key components (Figure 8): setting goals and identifying roles (that is, establishing what the different groups involved need to do); identifying key audiences and understanding their needs/ preferences; developing key messages and testing these before using them at scale; identifying the most effective modes, methods and channels for communication of messages; and establishing ways to monitor and evaluate the impacts of the communications efforts inspired by the strategy. We provide some initial recommendations on these components below.

**Figure 8: Framework for the Domestic Tourism Awareness and Communication Framework**



### *Setting goals and identifying roles*

Any goal that the sector sets should follow the SMART principles of being specific, measurable, achievable, relevant and time-bound. Goal setting will improve the sector's understanding of what the strategy needs to deliver, and the guiding principles for setting these goals are outlined in the next section.

### *Guiding principles*

Based on international best practice, all communication efforts within the domestic tourism sector must be based on six key principles integral to any effective communication strategy – these are listed below and frame the strategy and embedded awareness campaign we propose.

- Communication must be cost-effective – funds and other available resources for communication activities are generally limited. For this reason, communication programmes must be implemented at the appropriate scale, and be based on a sound understanding of the target audience, messages (that are memorable), and communication tools that are best suited for meeting the communication objectives. In short, the strategy must be designed to have maximum effect despite employing minimum resources. In the context of resources, the success of the strategy is highly dependent on identifying how the required resources will be leveraged and how sustainable these sources are.
- Communication must be outcomes-based - to ensure meaningful outcomes, the objectives of all components of the strategy need to be informed by the status quo and make use of SMART indicators that are measured based on Quality, Quantity and Time (QQT). Clearly defining the desired outcomes will also aid in designing messages that are effective and memorable.
- Communication must have target audience(s) – to maximise impact, communication activities must be directed at specific audiences rather than general groups, as illustrated above. This is achieved by understanding the target audience(s), specifically their motivations and communicative patterns. This strategy must clearly identify the target audiences as they relate to the domestic tourism sector.
- Communication must be impactful/ memorable – to be retained/ remembered by audiences and become considered and/ or accepted. Communication must be based on messages that are tailored to the target audience's reality and desires, and grab the attention of the target audience.
- Communication must use the best combination of communication tools – an appropriate and mutually reinforcing combination of communication tools needs to be employed to reach the target audience(s) and maximise impact. This should be cognisant of the diverse cultural and language preferences of local tourists.
- Monitoring of communication must be simple and systematic – while essential for evidencing the success and cost-effectiveness of communication activities, the complexity and sophistication of the monitoring and evaluation measures must be suited to the particular purpose(s) of the strategy. In recognition of Principle 1 above, the financial resources allocated to monitoring

should be minimised by adopting the most simple yet systematic approach that is most likely to generate meaningful evidence.

### *Implementation*

Operationalising the Domestic Tourism Awareness and Communication Framework will require government, development partners, private sector and civil society actors to mobilise and allocate resources so that the priority interventions defined in this strategy, such as the proposed awareness campaign, can be implemented within a realistic timeframe. Based on the stakeholder engagements, the main resources required for the Domestic Tourism Awareness and Communication Framework are skills and training, financial resources and information. It is important for government, specifically the Department of Tourism, to lead the mobilisation of resources but public-private partnerships and international agencies will be particularly valuable in this regard.

Six supporting actions that would help ensure the smooth transition from a framework to a strategy and hence, effective implementation of the Domestic Tourism Awareness and Communication Framework have been identified:

- Strengthening political leadership and governmental coordination
- Institutional setup to coordinate the strategy
- Promoting stakeholder awareness
- Mobilisation of resources for implementation
- Mainstreaming of the communication objectives
- Encouraging buy-in to the goals of the strategy

While this Framework has been developed for the domestic tourism sector specifically, it presents an opportunity to encourage the tourism sector generally and a whole-of-government approach to communication around recovery and resilience.

## **12. Skills development and training support**

As noted in the methodology section, this section draws from the findings of the primary data collection, the training needs to be embedded in the Domestic Tourism Recovery Framework and the Domestic Tourism Scheme (especially noting aspects that will strengthen implementation) and reflections from the THENSA workshop on the Tourism Education Gateway as well as the THENSA audit of tourism and hospitality-related qualifications (Bob, 2022). The tourism sector is a complex and multifaceted industry that requires a range of specialised skills and training as well as multidisciplinary knowledge to effectively meet the evolving needs and demands of travellers. To adequately prepare individuals for this sector, it is crucial to consider various external drivers that can impact the industry, such as technological development, globalisation, climate change, and other potential sources of disruption in the context of the 4<sup>th</sup> industrial revolution. The COVID-19 pandemic has been a significant disruptor to all economic sectors, including tourism and education/ training, and has highlighted the need for resilience and adaptability in the face of unforeseen challenges (Dube et al., 2020; Nhamo et al., 2020; Rogerson and Rogerson, 2020).

To effectively meet the changing needs of the tourism industry, it is essential to develop a responsive and agile training and education system. This should include a combination of specialised skills training, such as language proficiency, customer service, and cultural sensitivity, as well as multidisciplinary training in areas such as ecology and conservation, economics, social sciences, and business studies. Such training should be flexible and adaptable, with a focus on equipping individuals with the skills needed to meet the changing demands of the sector, including the integration of technological advancements and sustainable practices.

The conceptualisation and implementation of domestic tourism and skills development should commence with a national skills audit since there is considerable diversity in relation to stakeholders that reflects the diversity of the tourism sector in terms of products that require sensitivity to differing training needs. There are several key issues to consider, with the most important being the different types of training required: as outlined in Section 9.5 (training and capacity development issues), a range of training areas were identified that include customer service, domestic tourism product development, marketing and advertising (including digital marketing and social media), sustainability and responsible tourism, health and safety protocols, entrepreneurship and business management, and cultural and diversity awareness. Several other skills were identified during the THENSA workshop, with the most important being tourism human resource management, tourism business sustainability and financial management (linked to entrepreneurship and business management), computer skills and critical thinking. Additionally, the focus

should be on different types of tourism and domestic tourism destinations. Emanating from the previous section, training is also needed in terms of effective awareness raising and communication of domestic tourism aspects. Additionally, linked to the next section, training should also focus on building monitoring and evaluation capacity.

Numerous types of tourism training (including certificates, degrees, Work Integrated Learning and on-the-job training) are being undertaken by the higher education sector, government departments, and tourism businesses and organisations. However, concerns are raised about their relevance and alignment with industry needs. There is also the need to integrate domestic tourism considerations into curricula and to ensure that training targets not only students but also staff at all levels of the tourism industry to professionalise the sector, noted as being critical by many of the key informants and focus group participants. This often requires re-skilling and upskilling. Given the number of training providers involved in the tourism training space, it may be necessary to develop strategies to train the trainers to ensure that domestic tourism considerations are sufficiently integrated, and that alignment with industry needs and policies (such as the Domestic Tourism Scheme) is achieved. In terms of current tourism and hospitality qualifications, these were deemed to be important but needed to be revised and updated. Furthermore, efforts should be put in place to get short courses and other forms of training interventions/programmes accredited, which will assist in professionalising the sector and empower those working in domestic tourism. Effective training requires resources (including funding and competent trainers). The willingness of all stakeholders to support training initiatives, including being training facilitators, providing seminars, etc. should be established, and a database of tourism training stakeholders should be developed. For tourism businesses, their willingness to partner on internship/ Work Integrated Learning and apprenticeship programmes should also be assessed. Various barriers to effective training were identified, including funding/ financial constraints, quality of training, logistical challenges and awareness of training opportunities. Strategies need to be developed to address these challenges.

Undertaking a national domestic tourism skills audit is crucial for identifying the training needs and existing training initiatives and capacity to support the growth and recovery of the domestic tourism industry in South Africa. To ensure that the skills audit provides a comprehensive understanding of the sector, a mixed methods approach is essential. This approach involves using both quantitative and qualitative research methods to obtain a more detailed and holistic picture of the industry's training needs. A skills survey, which focuses on training needs and existing training initiatives and capacity, will provide useful trend analyses to inform training planning and interventions for domestic tourism. For instance, the



survey can help identify areas where the sector has a skills deficit, and tailor training interventions to address those gaps. Additionally, it can identify existing training initiatives and capacity that can be leveraged to provide more support to the industry.

However, while the skills survey provides a valuable quantitative analysis of the sector's training needs, it is essential to complement this with qualitative research. Key informant interviews and focus group discussions are critical to providing more in-depth insights into domestic tourism training needs and how to provide the necessary support for different components of a diverse sector. Through these methods, the experiences and perspectives of various stakeholders can be captured, including trainers, employers, and employees, among others. Furthermore, using a mixed methods approach provides a more nuanced understanding of the complex issues affecting the domestic tourism industry, enabling policy-makers and industry leaders to develop targeted interventions that address specific training needs. For example, the qualitative data gathered from key informant interviews and focus group discussions can highlight critical issues, such as the need for digital literacy training for tourism service providers to enhance their online presence and attract more customers. The adoption of a mixed methods approach in undertaking a national domestic tourism skills audit is vital to gain a comprehensive understanding of the industry's training needs. The combination of a skills survey, key informant interviews, and focus group discussions provide valuable insights into the training gaps and opportunities, enabling policymakers and industry leaders to develop targeted and effective training interventions that support the growth and recovery of the domestic tourism industry. Furthermore, qualitative and in-depth insights into domestic tourism training needs assist in providing the necessary support for different components of a diverse sector. This approach can help to ensure that training and education programmes are tailored to meet the specific needs of different sub-sectors, including those who may be historically disadvantaged or marginalised.

In the context of the above discussion, the domestic tourism training guideline includes the following:

- Identification and prioritisation of target groups: identify the groups that need to be trained in domestic tourism, such as travel agents, tour operators, hospitality staff, and government officials. Training should not be confused with awareness and communication target groups discussed in the previous section, although there is some overlap of the target groups. Given limited resources and the extent of training demand (linked to the large number of persons employed in the sector), which groups to target need to be prioritised.

- Assessment of training needs (undertake a domestic tourism skills audit): conduct a needs assessment (as discussed earlier) to identify the specific training needs of each target group, including knowledge, skills, and attitudes required to work in domestic tourism.
- Identify appropriate trainers/ training organisations: trainers/ training organisations from higher education institutions, relevant government departments and the private/ business sector. As suggested earlier, a database of tourism training service providers is important since they will be critical to action the development of training modules and undertaking the training discussed next.
- Development of training content and revision of existing training curricula: develop training content that is tailored to the specific needs of each target group and aligned to the level of qualification/ level of training. These should cover topics identified earlier as being critical for the domestic tourism sector. As noted earlier, existing curricula should be revised to include domestic tourism considerations. Additionally, where the level and content of training permit, accreditation should be considered if not already accredited.
- Training implementation: deliver the training through a combination of methods, such as classroom lectures, workshops, online courses, and on-the-job training. The training must be customised to the target groups and not generic.
- Monitoring and evaluation of training: monitor and evaluate the effectiveness of the training through feedback from participants, assessments of learning outcomes, and observation of on-the-job performance. Assessment tools should be developed and shared among training for consistency in data collection that can permit trend and comparative analyses.
- Continuous improvement: continuous monitoring and evaluation feedback should be used to improve the training programmes by revising and updating training content and priority areas, delivery methods, and assessment tools.

Other aspects that underpin the roll-out of domestic tourism training are partnerships and engagements with industry stakeholders such as tourism associations/ organisations and private sector operators to ensure that the training programme is aligned with industry needs and trends. Additionally, given the nature of the tourism sector (especially on-the-job training and developing experience/ expertise while working as well as work demands), it is important to develop mechanisms for recognising prior learning and experience, such as prior work experience, to enable individuals to progress through the training programmes at their own pace. Finally, where needed, access to funding or grants should be provided to support training costs, especially for those who cannot afford it. It may be more feasible to fund training organisations rather than individuals. In terms of certification and accreditation, the Department of

Tourism can engage with higher education institutions, organisations such as THENSA and the South African Qualifications Authority to establish certification and accreditation standards to recognise the completion of the training programme and to promote the quality and professionalism of the domestic tourism workforce.

### **13. Monitoring and evaluation indicator approach**

Monitoring and evaluation, as noted in the literature review, are essential for the successful development and management of domestic tourism, especially in the context of domestic tourism having many dimensions and role-players, and requires a multi-pronged suite of interventions and approaches. This section builds on the issues raised in the literature review, indicators identified by the key informants and focus group discussion participants, and aspects emerging from the Sections focusing on the Domestic Tourism Recovery Framework, the awareness and communication framework and the training framework. Drawing on the above, the key components that should constitute the monitoring and evaluation implementation approach are discussed in this section: championing, communication, institutionalisation, embedding and actioning (which includes the identification of indicators in specific categories).

The Theory of Change workshop undertaken with the Department of Tourism confirmed the following purpose and overall impacts of the Domestic Tourism Recovery Framework:

- Purpose
  - Providing a framework to enable the recovery of domestic tourism in South Africa to ensure sustainable tourism development and growth
- Impacts
  - Development of a growing, sustainable and resilient domestic tourism sector that contributes to the recovery of the tourism sector as a whole
  - Effective and targeted product development and marketing to encourage domestic travel in South Africa
  - Incentives and programmes (such as the Domestic Tourism Scheme) in place to encourage domestic travel
  - Training to support the implementation of the Domestic Tourism Recovery Framework
  - Meet tourism industry and stakeholder needs

- A monitoring and evaluation system developed to track changes and impact as well as assess progress establishing 'feedback control'

The envisaged purpose and impacts of the Domestic Tourism Scheme were also formulated:

- Purpose
  - To enable travel and tourism participation by people of modest income and the inclusion of previously marginalised members of society
- Impact
  - Domestic Tourism Scheme products, incentives and interventions promote domestic tourism
  - Increase in the number of domestic tourists from targeted groups
  - A tourism sector that is responsive to the needs and interests of domestic tourists from targeted groups
  - Partnerships with stakeholders to support implementation

### ***Championing***

The overall monitoring and evaluation custodian should be the Department of Tourism with decentralised responsibilities at provincial and local levels where interventions may be implemented and, more importantly, where information in relation to indicators are often sourced. The 'champion' should also ensure that proper consultation occurs and buy-in is secured with key stakeholders.

### ***Monitoring and evaluation communication approach***

The Table below highlights who should be the focus of a monitoring and evaluation communication approach, by when communication should occur, and what is the purpose of communicating with different groups and stakeholders. A phased approach to institutionalise domestic tourism monitoring and evaluation is advocated. For each indicator formulated, the resources required to collect the information should also be identified.

**Table 3: Monitoring and evaluation communication approach: target groups, timeframes and reason for communication**

<b>Target groups</b>	<b>Timeframe/s</b>	<b>Reason/s for communication</b>
Domestic tourism information/ data collectors/ generators: including national, provincial and local tourism departments as well as tourism organisations and departments collecting tourism business information	Initial implementation phase to generate baseline information (where non-existent) or to track changes pre-COVID-19 and thereafter at regular intervals to assess impacts and progress in achieving indicators. For each selected indicator, timelines need to be stipulated to ensure that information is collected timeously, verified and validated for improved quality assurance and reporting purposes.	Identifying the sources of information and who will be responsible will ensure that domestic tourism data is collected and provided as required for monitoring and evaluation purposes. Data generators and custodians are fully aware of monitoring and evaluation timeframes and requirements. When the same information is required from multiple sources (for example, all provinces to submit information), it is critical that the methodology to collect the information is agreed upon to allow for the aggregation of data. This group will also alert the Department of Tourism to challenges that need to be addressed. Training needs can also be identified and included in the implementation plan.
Information/ data managers: this includes persons/ officials, units and organisations that routinely collect domestic tourism information	At the start of implementing the monitoring and evaluation approach. Thereafter, if needed to support capacity and development and improve domestic tourism monitoring and evaluation capabilities.	This group is generally responsible for verifying and quality-assuring information as well as providing an oversight function. If well capacitated, they also have the capabilities to undertake different types of research that not only improve evaluation analyses but also assist in informing evidence-based decision-making in relation to identified strategic areas.
Data/ information users: includes departments and officials within government at different levels as well as tourism organisations	Need to be identified and appraised of the strategy, implementation plan and framework (best to include in consultative processes).	Maximises reporting and use value of domestic tourism information that can be used for strategic purposes, including the development of interventions/ programmes, resource allocation decisions as well as policy formulation and review. The dissemination of results will also be improved. In terms of domestic tourism recovery efforts, monitoring and evaluation will identify strategies and interventions that are working and those that are not, institutionalising evidence-based progress reporting and identifying.

### ***Institutionalisation***

Proper training of domestic tourism data/ information collectors, generators, managers and users is required within government at all levels and relevant tourism organisations. This includes the development of training materials to ensure that information about the domestic tourism monitoring and evaluation approach is visible and accessible to the target groups identified during the stakeholder mapping exercise, which will contribute to institutionalising domestic tourism monitoring and evaluation.

### ***Developing capabilities within an ecosystems approach***

To enable the domestic tourism monitoring and evaluation approach to be implemented, key issues that need to be unpacked are:

- Capacity: the necessary resources (including personnel and data management systems) are in place. If not, training and capacity needs should be identified and actioned.
- Capabilities: are personnel sufficiently trained to undertake the tasks associated with domestic tourism monitoring and evaluation? Improving domestic tourism data collection capabilities (including accessing existing relevant data from Statistics South Africa, South African Tourism and the Department of Trade and Industry) should also be a key focus area.
- Infrastructure: data management systems need to be adequate and functional.

### ***Embedding***

The domestic tourism monitoring and evaluation approach should also interface with other systems where relevant domestic tourism data is stored to mine and update information. This integration is important to:

- Improve data quality
- Minimise data replication
- Decrease actual data collection, if already being collected (information is collected by the main custodian and accessible to other authorised users)
- Permits data to be aggregated and disaggregated to understand trends and impacts spatially

### ***Actioning***

For each selected indicator, regular monitoring is needed to track progress in relation to the agreed timeframes. The progress reporting is mainly to inform adjustments/ interventions if required. These monitoring results need to inform higher-level strategic evaluations that provide strategic assessments in

relation to the recovery pathway of domestic tourism. The indicators identified are presented below concerning key areas of intervention:

- Domestic tourists
  - Number of domestic tourist arrivals in different regions/ destinations/ attractions (should be able to map which are the top domestic tourism destinations and changes over time)
  - Number of domestic tourists in South Africa annually, disaggregated by socio-economic/ demographic profile (for example, age, gender, employment and income status, place of residence, educational level, population group, disability status, etc.), group size and composition and seasonality
  - Average spend by domestic tourists
  - Average length of stay of domestic tourists
  - Type of accommodation used by domestic tourists
  - Percentage increase in the number of repeat visitors to different regions/ destinations in the country
  - Repeat visitation rates for domestic tourism destinations or experience
  - Feedback from domestic tourists on their satisfaction with the quality and availability of tourism services and facilities (satisfaction survey)
- Economic impacts/ job creation
  - Number and profiles of employees (including population group, age, gender, location and disability status which are key aspects associated with tracking equity and transformation imperatives in South Africa) employed in the tourism sector
  - Types of jobs (including tourism sub-sector employed in, whether full-time or part-time/ contract) employed in
  - Total revenue generated by domestic tourism in the country
  - Number of new jobs created in the tourism industry as a result of the implementation of the Framework and Scheme
  - Number of small businesses established or supported as a result of the implementation of the Framework and Scheme

- Number of new tourism products/ incentives developed targeting domestic tourists
- Percentage increase in tourism-related infrastructure in different regions/ destinations in the country
- Feedback from domestic tourism service providers on their satisfaction with the demand for domestic tourism (satisfaction survey)
- Domestic tourism contribution to GDP on the overall economic growth and development of the country
- Domestic tourism products and services
  - Number of existing domestic tourism products, disaggregated at local and provincial levels as well as categorised by type of tourism product and services
- Projects/ programmes to reignite domestic tourism
  - Number and types of projects/ programmes to reignite domestic tourism, categorised into types such as funding support (detailed later as a separate aspect), infrastructural investments, incentives targeting domestic tourism, training and capacity development projects/ programmes, improved internet connectivity and use to market domestic tourism, etc.
  - Number and profiles of beneficiaries in relation to each project/ programme
- Domestic Tourism Scheme
  - Level of awareness of the Scheme among key stakeholders
  - Number of components of the Domestic Tourism Scheme implemented
  - Number of marketing campaigns implemented (and media coverage detailed below)
  - Number and amount of holiday/ travel vouchers issued
  - Number and amount of discounted rates offered
  - Number of establishments providing staff with opportunities to travel in South Africa
  - Number of schemes (savings/ stokvels) activated and number of members in the schemes



- Number of new tourism establishments being graded and number of graded establishments retaining their grading
- Safety and security
  - Number of domestic tourists reporting incidents of crime when travelling
  - Number of reported incidents of crime in domestic tourism destinations
  - The severity of reported incidents of crime, such as the number of injuries or fatalities
  - Perceptions of safety and security among domestic tourists, measured through surveys
  - Number of security personnel deployed in domestic tourism destinations
  - Availability and adequacy of emergency services in domestic tourism destinations
  - Number of safety and security training and capacity-building initiatives for domestic tourism service providers
- Funding/ investment
  - Amount of public and private sector funding supporting tourism SMMEs
  - Number and profile (size of business in relation to the number of employees, turnover, location, etc.) of tourism SMMEs supported
- Training
  - Number of domestic tourism-related training and skills development programmes implemented and the number of individuals trained
  - Participant satisfaction with the training program, measured through surveys
- Media and communication monitoring (assessing effectiveness of the implementation of the awareness and communication approaches adopted)
  - Total impressions or reach of media coverage or advertising targeting domestic tourism
  - Number of media articles or advertising campaigns targeting domestic tourism
  - Sentiment of media coverage or advertising towards domestic tourism
  - Number of social media mentions or shares related to domestic tourism

- Engagement metrics for social media content targeting domestic tourism, such as likes, comments, and shares
- Website traffic and search engine rankings for domestic tourism-related keywords
- Conversion rates of domestic tourism advertising campaigns or promotions
- Sustainability
  - Number of greening initiatives implemented
  - Reduction in energy and water consumption in tourism facilities
  - Adoption of environmentally-friendly practices in tourism operations, such as using renewable energy sources and eco-friendly products
  - Increase in the use of sustainable tourism certification schemes by tourism businesses
  - Number of educational and awareness-raising activities on sustainable tourism conducted for domestic tourists, tourism businesses, and local communities
- Organisational support
  - Number and type of government departments, tourism organisations and private sector enterprises supporting domestic tourism recovery efforts
- Development and implementation of sustainable domestic tourism policies/ strategies, frameworks and guidelines by tourism authorities and local governments
  - Number of policies/ strategies developed (and implemented) at national, provincial and local levels that integrate domestic tourism aspects
  - Number of frameworks developed (and implemented) at national, provincial and local levels that integrate domestic tourism aspects
  - Number of guidelines developed (and implemented) at national, provincial and local levels that integrate domestic tourism aspects

Each of the indicators presented above should be linked to the Logical Framework development derived from the Socio-economic Impact Assessment System (SEIAS) guidelines (Republic of South Africa, 2020) that include focusing on the impacts (organisational, community, social and systemic changes), outcomes (specific changes in the behaviour, knowledge, skills, status and capacity domestic tourists and other stakeholders), outputs (amount and types of services provided to domestic tourists and other stakeholders), activities (identified actions to be implemented), inputs (resources used such as personnel,

time, funds, etc.), external conditions (the current environment in which domestic tourism recovery is envisaged) and assumptions (aspects that will be necessary considerations in achieving success) that are related to implementing the Domestic Tourism Recovery Framework and Domestic Tourism Scheme. A logical sequence (Logical Framework alignment) as per the SEIAS guidelines (Republic of South Africa, 2020) should be developed that include:

- Results (Impact, Outcomes and Output)
- Activities and Input
- Indicators (measures designed to assess the performance of implementing the Domestic Tourism Recovery Framework and Domestic Tourism Scheme)
- Baseline (the situation before the implementation of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme)
- Targets for each indicator (a specified objective that indicates the number, timing and location of that which is to be realised)
- Risks (also linked to assumptions) that can undermine the implementation and impact of the Domestic Tourism Recovery Framework and Domestic Tourism Scheme

The key component of identifying interventions and associated indicators for the Logical Framework has been compiled (although not exhaustive and likely to change during consultations with stakeholders and as implementation occurs). The next step is to populate the other aspects of the Logical Framework detailed above. This could commence during the workshop scheduled for 23 March 2023 that will focus on this Domestic Tourism Recovery Framework.

It is clear the theoretical framework presented earlier, which guides the study, including the research design adopted for this study, accommodates a consideration of these aspects. In this regard, monitoring and evaluation become important to assess the impacts of these efforts and inform the development of future initiatives. Research should include resident perception studies of these campaigns and willingness to partake in domestic tourism activities. Furthermore, research should focus on targeted beneficiaries such as tour operators. Additionally, the various ways of promoting domestic tourism, including communication strategies, need to be assessed. Various approaches are used in South Africa, which includes holiday and travel expos, stokvel activations, websites, billboards, telescopic flags media, magazines as well as radio and television stations. South Africa requires a more synergistic and strategic manner of promoting domestic travel while concurrently developing affordable tourism products and packages for the range of local consumers.

## **14. Conclusion**

Domestic tourism is an important sector for any country's economy, and this is particularly true for South Africa. Furthermore, the domestic tourism sector has the potential to promote social cohesion and cultural exchange within the country. The COVID-19 pandemic has had a severe impact on the domestic tourism sector. The sector's recovery is therefore critical to the country's economic and social recovery. The Domestic Tourism Recovery Framework developed from the evidence-based approach adopted and the Domestic Tourism Scheme provide guidance on how to shift the domestic tourism sector from a traditional industrial model to a more sustainable ecosystem-based model. The proposed awareness and communication framework will also play a crucial role in stimulating demand and encouraging people to explore their own country. The monitoring and evaluation approach will track changes and inform revisions to ensure greater impact. The recovery of the domestic tourism sector is of paramount importance for South Africa's economic and social recovery. By leveraging the sector's potential and repositioning it for sustainability and resilience, the country can unlock significant economic benefits while promoting socio-economic benefits.

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## **Appendix 1: Focus Group Discussion and Key Informants Interview Schedule**

### **Piloting and Refinement of the Domestic Tourism Recovery Framework (DTRF) in South Africa, Using the Domestic Tourism Scheme (DTS) as a Case Study**

1. The profiles of the tourism service providers/ stakeholders engaged with.
  - Type of organisation/ department from
  - Main interest in domestic tourism
  - Number of years operational
  - Number of employees (if any)
2. What are the key challenges that domestic tourism faces in South Africa?
3. What are the key opportunities that domestic tourism faces in South Africa?
4. Perceptions of the Domestic Tourism Recovery Framework (DTRF) and Domestic Tourism Scheme (DTS) (including opportunities for implementation and anticipated challenges)  
The DTRF report and DTS will be circulated to participants prior to the engagement.
  - Levels of awareness of the DTRF and DTS prior to the DTRF and DTS information being sent.
  - What aspects aware of at the time of the interview/ discussion?
  - What should be the priority areas?
  - Who are the key stakeholders to ensure domestic tourism recovery and resilience?
  - Which areas/ aspects of the DTRF and DTS should be revised? Are there gaps/ areas for improvement that need to be addressed?
  - What are the likely implementation challenges to be encountered in respect of specific activities, programs, interventions and incentives identified in the DTRF and DTS, and why?
5. In relation to the DTS as a case study, the level of willingness to support the Scheme
  - Are you willing to support the DTS? Do you think that similar tourism service providers/ stakeholders to you will be willing to support the DTS?
    - o If yes, please indicate specific areas that you are willing to support.
    - o If not, please provide reasons.
  - How should the DTS be implemented in the context of the DTRF?
  - Which groups/ stakeholders should be supported to implement the DTS? What type/s of support should be provided and by whom for each group/ stakeholder?
6. How best should the DTRS and DTS be communicated to the broader public and key stakeholders?
  - What is the value of having a targeted communication approach?
  - Who should be targeted?
  - What should be the main messaging/ content?
  - Who should be responsible for the communication?
7. Who should take responsibility for the implementation of the DTRF and DTS? (the different groups/ stakeholders identified, together with the respective roles and responsibilities)
  - What type/s of resources are needed, and for what purpose?
  - What type/s of training/ capacity development is needed? Who should provide the training?

- What are the skills development and training gaps that need to be addressed to support the implementation of the DTRF and DTS?
8. What are the feasible and appropriate indicators to monitor and evaluate the implementation of the DTRF and DTS?