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# COVID-19: Implications for Agritourism in the Western Cape

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July 2020

*Given the rapid pace of developments both, locally and globally, this overview does not aim to be comprehensive as in some cases policy responses are still a work in progress, formal reporting is not yet available and/or restrictions are undergoing changes. This overview may be updated periodically.*

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*Cover Photo: Redberry Farm, George*

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## Executive Summary

Tourism contributes to economic growth, poverty alleviation and job creation. South Africa has been struggling to attract higher tourist numbers in recent years, mainly owing to drought conditions, the ongoing energy crisis, high unemployment and low economic growth to name a few. The onset of the global pandemic due to the spread of the novel coronavirus commonly referred to as COVID-19, are now threatening the survival of this important economic sector.

The contribution of tourism to the South African economy was valued at R130.2 billion in 2018, making a contribution of around 3% to the national GDP of the country. Given the linkages to other sectors and activity offerings, agritourism will be as hard hit as the wider tourism industry that provides additional income to farming businesses and creates jobs in rural areas.

A recurring theme is the opportunity to reinvent current tourism business models, and for a collaborative approach across stakeholders to find innovative solutions to ensure survival and sustainability of the industry. The role of new approaches to business, e-commerce and social media has been highlighted as critical in connecting to markets during these restricted times. Going forward, agritourism will need to adapt to the changes brought about by COVID-19 to be more accessible and affordable to the domestic market, promote health and safety measures along the value chain and appeal to offerings for smaller groups of tourists.

There is a call for the industry operators to offer ideas to associations and get behind coordinated media campaigns and webinars to support the opening of safe activities in tourism, support structured engagements between government and the wider sector (SATSA, 2020).

Data is required to further quantify the impact of the coronavirus on agritourism in the Western Cape and to further build the case to support agritourism and the tourism sector at large.

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# 1. Introduction

Tourism development is increasingly seen an important vehicle to foster economic growth, to alleviate poverty and to enhance food security (Richardson, 2010). This is particularly true for agritourism offerings in South Africa (SA) that provide additional income to farming businesses and create jobs in rural areas.

Tourism contributes to economic growth in both direct and indirect ways. The former comes from primary tourism activities, which sees economic activity in sectors such as lodging, restaurants, transportation, amusements and retail trade (Stynes, 1997). Tourists therefore contribute to local sales, profits, jobs, tax revenue and overall income in a region. On the secondary or indirect linkages, tourism affects most other sectors of the economy (tourists buy products and use local services). Given the linkages to other sectors and activity offerings, agritourism will be as hard hit as the wider tourism industry. Agritourism creates opportunities for small business and employment (Van Niekerk, 2013), promotes awareness of cultures, may make a positive contribution to conserving the environment and contribute to the development of rural communities (Barbieri, 2010).

In the South African context, it is clear that various policy documents highlight the importance of the tourism sector as one of the core pillars for economic growth (NPC, 2011). The Industrial Policy Action Plan has identified the tourism sector as one of the areas that may contribute significantly to rural and cultural development and the National Tourism Sector Strategy focusses on facilitating economic growth in this sector (NTSS, 2011). The policy environment puts emphasis on increasing the number of tourist arrivals and the amount spent by each tourist during their visit, improving the availability of tourism infrastructure, easing air access and positioning South Africa as a regional shopping and business hub (NTSS, 2017).

Tourism is affected by various economic factors impacting the decision on whether or not people decide to travel. Overall, economic conditions in SA has experienced some difficult years with regards to attracting higher volume tourist numbers mainly owing to drought conditions, the ongoing energy crisis, currency volatility, high unemployment and low economic growth (NTSS, 2017). Notwithstanding these challenges, some policy decisions have arguably stifled tourism growth with regulations on travel with children, resulting in economic losses of around R2.6 billion

(Masehela, 2016). These adverse circumstances are further exacerbated by the world now facing an unprecedented global health, social and economic crisis with the emergence of the novel coronavirus, COVID-19.

The coronavirus has rapidly impacted every person, extending to all industries around the world and has resulted in a myriad of different policy interventions to minimise the spread of the virus. The tourism sector is arguably one of the worst affected by the global pandemic since most governments around the globe have introduced stringent lockdown measures limiting the movement and gathering of people in an attempt to “flatten the curve” of infection by closing borders, grounding flights, restricting operations of restaurants, accommodation etc. These measures are necessary to contain the virus but have dire consequences for tourism and hospitality. The sector may start to move towards recovery once these restrictions are eased, if businesses can survive the immediate fall out of the pandemic and consumer confidence can be re-built.

Even so, industries will suffer huge losses for some time e.g. airline industry impacts could persist for at least five years, with international travel being the most impacted (IATA, 2020). Small businesses, most vulnerable to shocks, will need to be innovative in order to survive impacts of the virulent disease and the industry will likely be met by a shift in consumer behaviour that remains uncertain and challenging to predict. In the absence of a vaccine and the realistic roll-out thereof, COVID-19 will be part of life for some time and with that, extended impacts. It follows that the impacts for tourism and agritourism will persist. Furthermore, given that agritourism provides additional income to farming businesses and rural livelihoods, COVID-19 has significant implications for the financial well-being of the agricultural sector.

This report aims to provide a brief overview of the contribution of tourism and agritourism to the economy and the potential impacts of COVID-19 on tourism and small business in particular, extending to smallholder farmers and agritourism. Some of the policy responses are mentioned where relevant to these industries. However, it is noted that responses continue to emerge and adapt as the situation evolves. The report considers opportunities that may arise out of the crisis, inviting thought leadership on re-imagining the tourism sector and further research on the impacts of COVID-19.

## 2. Background

The coronavirus has brought on a large-scale public health crisis that is also generating an economic crisis as production and consumption slumps. Vast uncertainties and the magnitude of the shock has sent ripples through markets with an unprecedented global recession looming (OECD, 2020). According to a recent forecast by the OECD (2020), the initial direct impact of the lockdowns around the world could decrease output by between 20-25% in many countries, with consumer expenditure dropping up to 30%. This OECD report further implies that annual Gross Domestic Product (GDP) growth is estimated to decline up to two percentage points per month of strict containment<sup>1</sup>. Various institutions have forecasted potential impacts of the coronavirus since March 2020 with negative adjustments being made as lockdowns persist. For example, the UNCTAD expected a 5-15% foreign direct investment in early March 2020, later revised to a reduction by 30-45% for the year 2020 to 2021 towards the end of March. The International Labour Organisation (ILO) estimated a rise of global unemployment between 5.3 million and 24.7 million.

The International Monetary Fund (IMF) published reflections between the coronavirus pandemic and the 2008/9 financial crisis, indicating that the decline in the services' sector appears greater in the current crisis. The IMF World Economic Outlook released a forecast of a 3% decline in global GDP in April 2020, expecting further downward risk (OECD, 2020). South Africa's President, Cyril Ramaphosa, declared the COVID-19 a national state of disaster on 18 March 2020 when several recovery measures were announced to limit the spread of the virus, some of which were:

- Closure of schools, encouragement of social distancing and working from home;
- A travel ban for foreign nationals from Italy, Iraq, South Korea, Spain, Germany, United States, United Kingdom and China. People returning from high risk areas were required to self-isolate or quarantine for a period of 14 days;
- Events or gatherings of more than 100 people were banned. Many subsequent amendments were made with easing of regulations.

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<sup>1</sup> This impact is dependent on additional factors such as the magnitude and duration of national lockdowns, the extent of reduced demand for goods and services and the response of fiscal and monetary policy support.

Following these initial interventions, a stringent lockdown was imposed for a period from 25 March 2020 up to 30 April 2020, allowing only workers in essential services<sup>2</sup> permitted to work and the general population to stay at home, apart from going to the shops for items deemed to be essential and for medical care. The restrictions were imposed for the protection of SA citizens and in attempt to slow the spread of the virus and for health services to prepare for the peak of infections. A phased approach to easing of restrictions was put forward (SA Government, 2020). SA has subsequently moved from total lockdown to level 4 on 1 May 2020 and thereafter to level 3 since 1 June 2020 with further easing of restrictions in July 2020. The different Alert levels are given in Figure 1 below.



Figure 1: Summary of alert levels for SA

Source: SA Government (2020)

<sup>2</sup> Essential Services – Coronavirus COVID-19 <https://www.gov.za/Coronavirus/essential-services>



### 3. Global Impacts on Tourism and Travel

#### 3.1 Impacts on Tourism

Global tourism has been steadily increasing since the 1950's and prior to the COVID-19 outbreak, arrivals were predicted to reach 1.8 billion by 2030 (Lubbe & Douglas, 2019). International tourism has seen sustained growth for the past decade but the potential impact of the coronavirus pandemic could put an abrupt end to growth, likened to tourism results for the 1950's with results worse than the 2008/9 financial crisis (UNWTO, 2020). Figure 2 shows the international tourist arrivals from different regions since 1950, clearly showing this phenomenal growth and various slumps during global economic downturns (2001 & 2010).

According to the World Tourism Organisation (UNWTO, 2020), the direct contribution of the travel and tourism industry accounts for 3.3% of global GDP. In 2019, the growth rate was reported to be 3.5%, outperforming average growth rate for the almost a decade, and ranked as the third highest in the global economy's GDP growth (UNWTO, 2020). In the same year, the sector supported 330 million jobs (one in ten jobs), making a 10.3% contribution to the global labour force and generating one in four of all new jobs (UNWTO, 2020). Out of the top ten destinations<sup>3</sup> by international tourists, eight are seen to be the hardest hit by COVID-19. The overall current forecasts point to declines of 60-80% in international tourist arrivals for 2020 (UNWTO, 2020).

Prospects for the year 2020 show high levels of uncertainty, with negative adjustments and as the situation evolves and impacts deepen. The predicted and actual impacts largely depend on the speed of containment, the duration of restrictions and border closures, whilst the duration, of lockdowns and the possibility of a second wave of infection could see further contractions (UNWTO, 2020).

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<sup>3</sup> Top ten destinations: France, Spain, United States, China, Italy, Turkey, Mexico, Germany, UK and Thailand. In countries most affected by COVID-19 such as Spain and Italy, the contribution to GDP amounts to 14% and 13% respectively.

Global pandemics (such as SARS, Swine Flu, Ebola and MERS) have provided some insight into the implications for the tourism industry. Some of which are listed below:

- Cancellation of tourist arrivals and events
- Declines in exports and decreases in consumer spending<sup>4</sup>;
- Dramatic declines in economic activity leading to instability in global markets;
- Security protocols are crucial to limit the spread of virulent;
- International cooperation and coordination is critical to manage the spread of disease;
- Impact on production, viability of businesses, job retention and job creation and
- Government stimulus and liquidity injections from central banks will be required to survive global economic shutdowns and to boost economic recovery until the pandemic is under control.

Looking at the most impacted countries, overall Asia (mostly China) is predicted to see the largest decline in travel and tourism revenue in 2020. In Europe, the industry employs an estimated 13 million people and revenue losses are likely to be in the order of €1 billion per month. Italy has been heavily impacted by the virus, and is expected to see a 60% contraction of the industry in comparison to 2019 contributions (UNWTO, 2020), alongside 23 000 agritourism offerings closed in March 2020. Italy was the first country to report on a disrupted food system leading to increased demand for home-delivered produce (World Farmers' Organisation, 2020). The United States of America (USA) emerged as the epicentre of the pandemic towards the end of March 2020, experiencing a contraction of 4.8% GDP for Quarter 1 (Q1). New spending to mitigate the economic impact is upwards of US\$3 trillion (BBC, 2020).

### **3.2 Impacts on Travel**

The SA Tourism Satellite Account (2017) reported that, in 2017, the sector directly employed 722 013 people, a 4.6% increase from the previous year, and in 2018 tourist arrivals saw an increase of 1.8%, to 10.5 million people (STATS SA, 2018). However, growth experienced in SA is reported to be much lower than the global growth rate of 6% (UNWTO, 2019) and the contribution of tourism to GDP declined by 1.7% in 2018

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<sup>4</sup> In 2009 H1N1 in Mexico resulted in estimated loss of US\$5 billion; 2002 to 2004 SARS in Hong Kong tourism GDP declined by 41%, Singapore by 43% and China 25%. China also experienced 2.8 million job losses

(WTC, 2018). Despite many challenges, the tourism sector has shown resilience, recovering from political instability, health pandemics and natural disasters. Figure 2 shows that international arrivals have seen persistent growth since the 1950's despite numerous global crises.

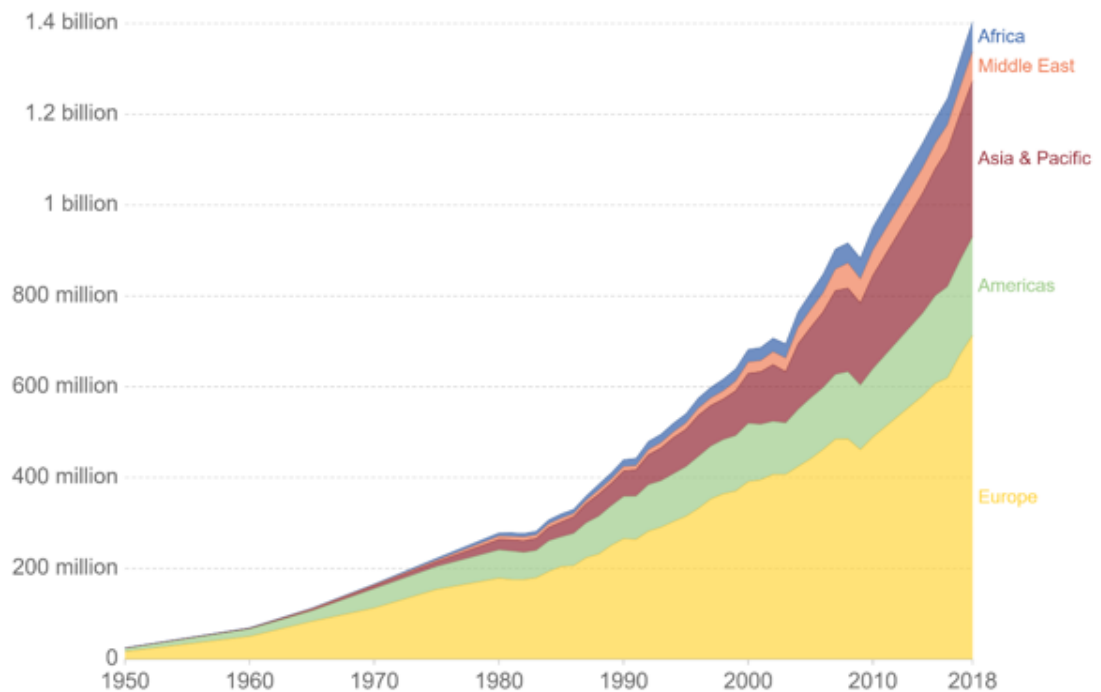
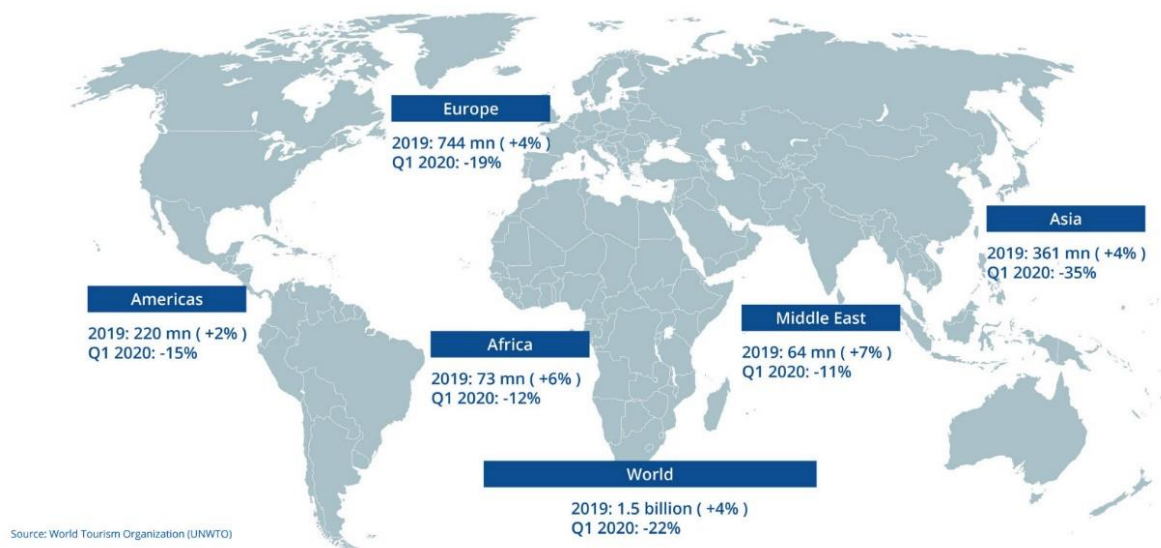


Figure 2: International tourist arrivals by world region

Source: UNWTO (2019)

Air travel experienced a boom over decades of improved standards of living in emerging markets but the coronavirus is a major, unprecedented disruption for the airline industry and the impacts could persist for at least five years, with international travel being the most impacted (IATA, 2020). Even under perceived best-case scenarios, this crisis will incur many job losses and stunt aviation-stimulated growth global traffic will still be around 10% below original estimates in 2025 (IATA, 2020). The International Air Transport Association expects that travel recovery to 2019 levels may only be achieved by 2023 and travel in 2021 is expected to be down 30 to 40% (IATA, 2020). This scenario is based on a slower opening of economies and easing in travel restrictions, with lockdowns extending to the third quarter of 2020 (and possibly a resurgence of the virus, which would delay air travel further). This then leads to global passenger demand declining by 34% from 2019 figures and the forecast for 2021 is

41% lower than previous forecasts (IATA, 2020). The UNWTO put forward provisional estimates for international arrivals between January and March 2020. Figure 3 depicts a comparison of arrivals for 2019 and 2020: Quarter 1.



**Figure 3: International arrivals by world region, 2019 and Q1 2020**

Source: UNWTO (2020)

The percentage change in arrivals is shown in Figure 4 indicating sharp falls in March, particularly for Asia and Europe (greater than world's average decline). Given the travel restrictions for all destinations, the provisional data suggests 67 million fewer international tourist arrivals for Q 1 and US\$80 billion lost in exports<sup>5</sup> (UNWTO, 2020).

<sup>5</sup> Visitor exports is the spending within a country by international tourists for leisure and business travel.

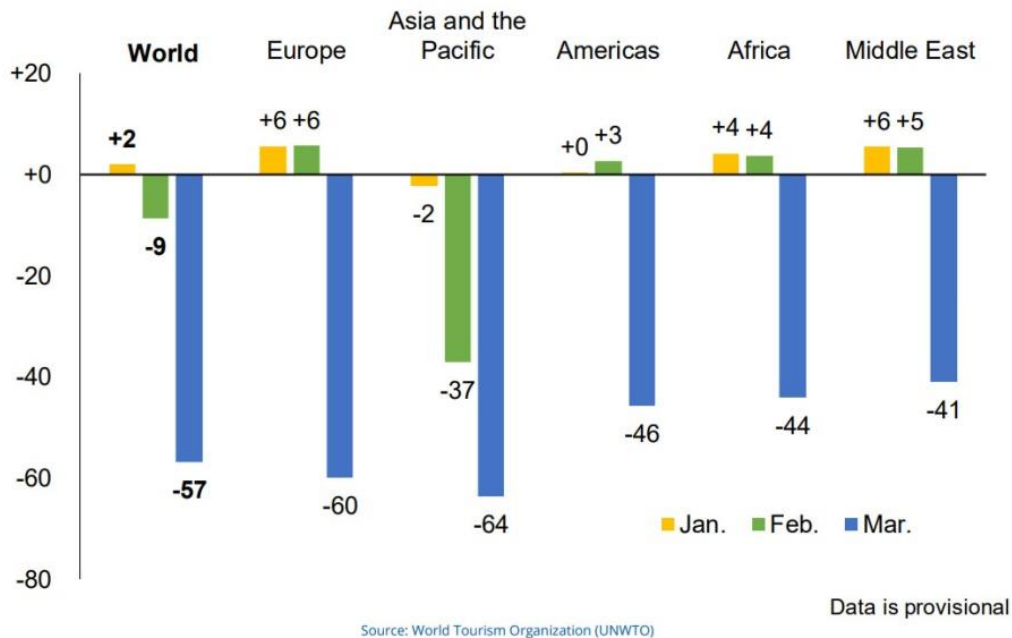


Figure 4: International arrivals, January to March 2020 (% change)

Source: UNWTO (2020)

The UNWTO (2020) published scenarios to reflect possible changes in arrivals from April to December 2020 with travel restrictions lifted and national borders opened:

- Scenario 1 – early July 58%,
- Scenario 2 – early September 70% and
- Scenario 3 – early December 78%.

With between 850 million to 1.1 billion fewer international arrivals, these scenarios would put 100 to 120 million direct tourism jobs at risk, coupled with US\$910 billion to US\$ 1.2 trillion loss in export revenue from tourism globally (UNWTO, 2020).

The potential impacts of the coronavirus pandemic becomes glaringly apparent when considering the trend for international arrivals from 2000 to 2019, with the inclusion of the UNWTO's scenarios for 2020. Figure 5 indicates a far greater impact than past crises such as the 2001 9/11 attack, the 2003 SARS epidemic and the global financial crisis of 2008/2009.

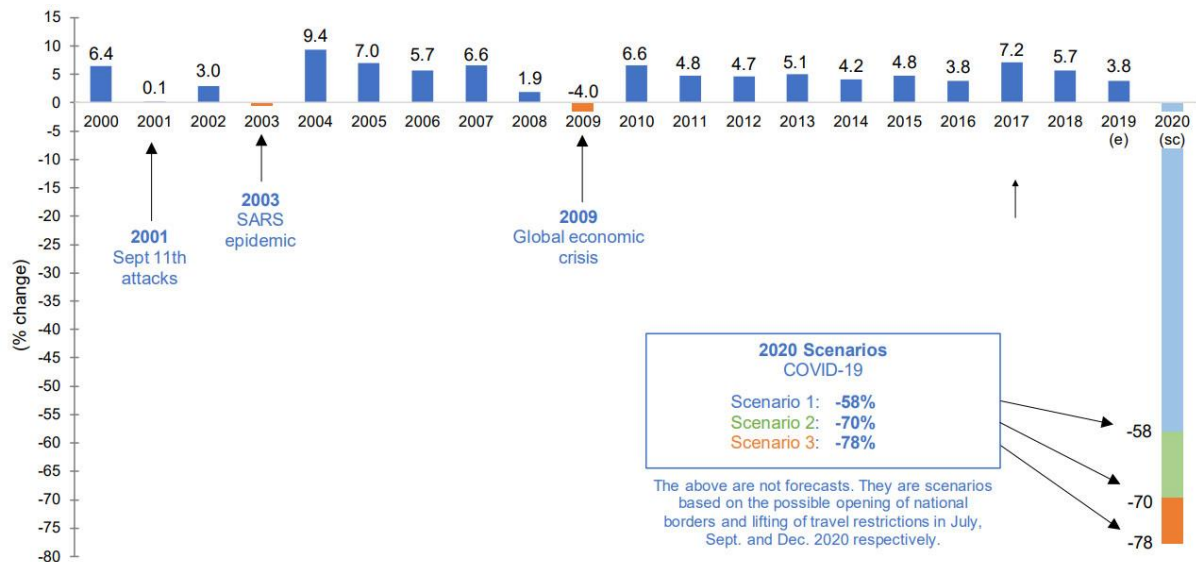


Figure 5: International tourist arrivals, 2000 to 2019 and scenario for 2020 (% change)

IATA (2020) suggests that travellers are likely to cautiously manage travel spend and have a preference for local travel. Recovery is expected to be led by domestic demand and IATA (2020) predicts that domestic passenger demand may only recover to 2019 levels by 2022, and international demand by 2024. IATA (2020) calls for a two-fold solution that requires global coordination:

- Giving passengers confidence to travel safely and without undue hassle (alternatives to quarantine while traveling) and
- Giving governments' confidence that they are protected from importing the virus from travellers.

A globally coordinated bio-security system including temperature checks and contract tracing would only be the beginning of managing the risk and restarting international travel but rebuilding passenger confidence will take a long time (IATA, 2000).

## 4. The South African Tourism Industry

South African tourist arrivals has been seeing slow growth in recent years, despite the surge shown elsewhere. Arrivals declined by 6.8% in 2015 as the country experienced severe droughts and associated water restrictions. Performance of the sector improved in 2016, recovering to 12.8% (STR, 2018). Despite slow growth, government has identified the potential of the sector to accelerate economic growth and job creation (NTSS, 2017). This section considers key indicators of contribution such as GDP and employment.

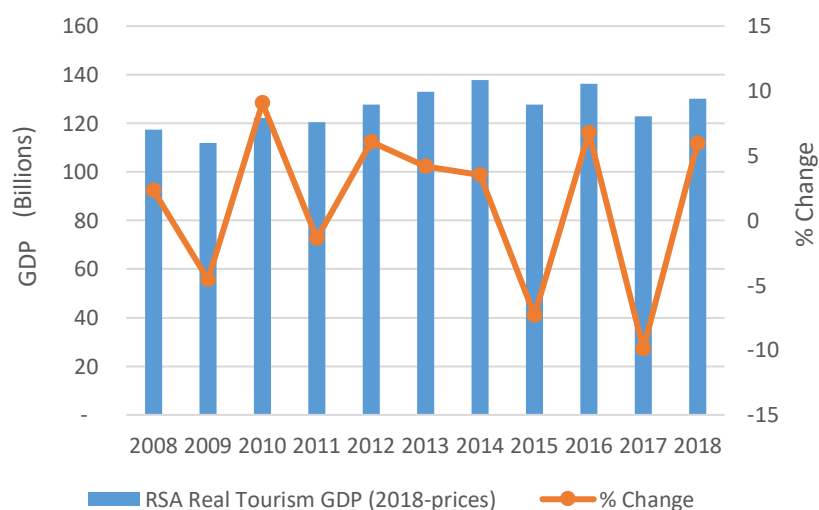
The President's 2019 State of the Nation address (SONA, 2019) announced a strategy to achieve arrivals targets of 21 million visitors by 2030. However, in 2019 international arrivals were down 11.7% translating to 1.25 million less people (Smith, 2020). Following SONA 2020, the sector welcomed the announcement of a Tourism Equity Fund to stimulate transformation that would be launched in 2020, together with plans to address safety and security, the energy crisis and the need for an efficient public transport system. These plans took an abrupt backseat when, a month later, the devastating coronavirus hit South African soil. Travel bans and global lockdowns were imposed in March 2020, to slow the spread of the pandemic, sending the tourism sector into uncharted territory (Smith, 2020).

Following the impacts of the initial outbreak of the coronavirus in Wuhan, China, the number of Chinese tourists that would have visited SA in Q1 2020 was down by approximately 40% compared to 2019 figures for the same period (affecting the absolute number of arrivals for the year) (Smith, 2020). In a recent publication, STATSSA published a comparison between movements between March 2019 and March 2020, with foreign arrivals and departures decreasing by 33.7% and 25.2% respectively. Similarly, movements between February 2020 and March 2020 saw a decrease of 29.3% foreign arrivals and 16.7% foreign departures (STATSSA, 2020).

Major events that bring thousands of tourist arrivals, such as the Two Oceans marathon and the Africa Travel Indaba, World Travel market Africa (among others) were cancelled, while others scheduled for later in the year face postponement, keeping a close eye on unfolding circumstances.

### How important is the tourism sector to the South African economy?

It is particularly difficult to determine this sector's contribution since its output is not measured using the standard national accounting framework, which classify industries according to the goods and services it produces. Rather, the tourism industry is a consumption-based activity by a group of consumers and therefore an amalgamation of different industries (transportation, accommodation, food & beverage services, recreation, entertainment etc.) on which tourists spend their money (StatsSA, 2018). Tourism is therefore defined as activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and purposes other than being employed in the place visited (OECD, 2002). Due to these difficulties, the United Nations Statistical Commission (2000) approved the use of Tourism Satellite Accounts (TSA) as a conceptual framework to for tourism statistics. The economic impact of the tourism sector is therefore measured by the consumption spending of tourists as published in the SA Tourism Satellite Accounts (StatsSA, 2018). Using this method, the latest estimate of the contribution of tourism to the South African economy was valued at R130.2 billion in 2018, making a contribution of around 3% to the national GDP of the country. Adjusting for inflation<sup>6</sup>, Figure 6 provides the trends of tourism GDP from 2008 to 2018 and shows the annual percentage change on the secondary axis.



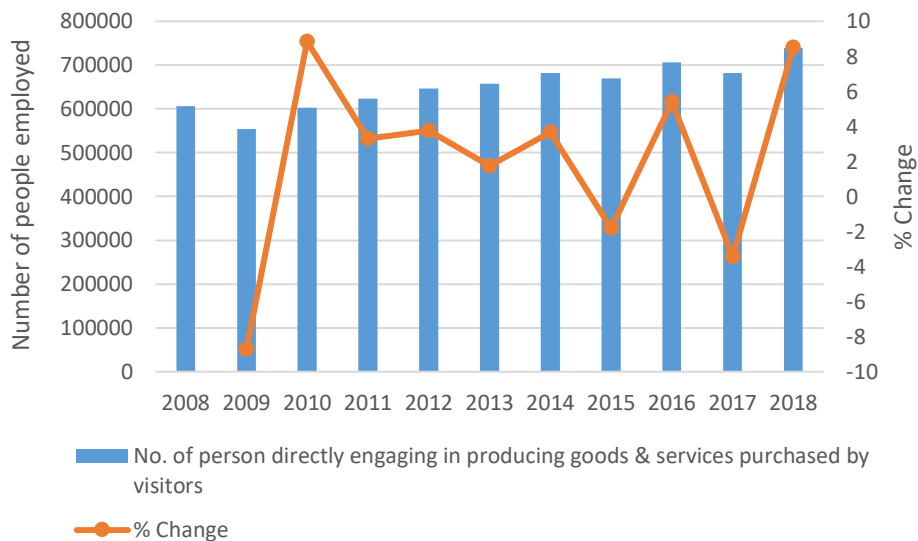
**Figure 6: Trends of tourism GDP and annual percentage change, 2008 to 2018**

Source: STATSSA (2018)

<sup>6</sup> All value were adjusted to 2018-prices using StatsSA deflator



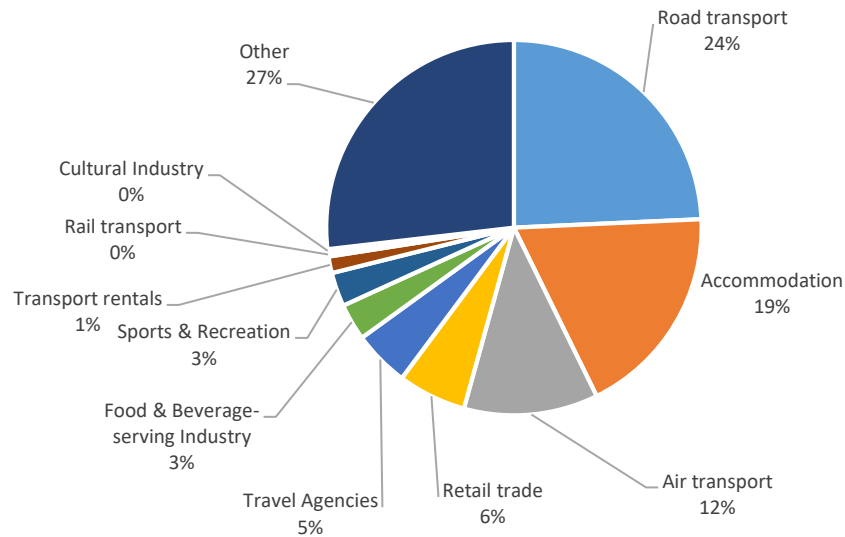
Throughout this period, the average annual growth rate of the sector was 1.04%, with the 2015 and 2017 tourism season showing weak growth. The sharp decline in 2009 can be attributed to the global financial crises, whilst those more recent contractions owing to drought conditions, the energy crisis, high levels of unemployment and low economic growth. The state of tourism report also shows the trend of tourism direct job creation, calculated by adding the number of persons directly engaged in producing goods and services purchased by tourists and is given in the figure below.



**Figure 7: Trend of tourism job creation**

Source: SA Tourism Satellite Account (2018)

A percentage breakdown of value added to various sectors is illustrated in Figure 8, the total income amounting to R1 18 443 million. STATSSA (2020) recently published that the total income for tourist accommodation decreased by 31.3% in March 2020 compared to March 2019, with a decrease of 10.4% for Quarter 1 2020. The largest negative growth rates were reported for guest-houses and guest-farms (-55.8%) (STATSSA, 2020). Restrictions on travelling for leisure were eased under Level 3, but has subsequently been retracted on 12 July 2020, resulting in another blow to the industry.



**Figure 8: Value added with tourism, 2018**

Source: Tourism Satellite Accounts (2018)

With linkages to the agricultural sector, the food and beverage serving industry with also experienced extensive economic impact following the COVID-19 lockdown regulations. According to STATSSA (2020), the total income generated by the food and beverages industry decreased by 29.4% year on year in March 2020, with bar sales showing the largest decrease of -40.4%. Total income Quarter 1 2020 decreased by 9.1% (STATSSA, 2020).

### *Towards Recovery*

South African Tourism hosted a webinar to share some insights on opportunities from the industry. Panellists suggested that travellers above 55 years<sup>7</sup> have higher likelihood of comorbidities travellers and may be less likely to travel following pandemic conditions. The older and more affluent demographic are a low proportion of total arrivals to SA but are critical to the economy given their generally higher spending and preference for traveling out of season. Older travellers tend to visit agritourism offerings e.g. game lodges, it follows that the industry should start preparing to shift

<sup>7</sup> About 30% of SA visitors are older than 55 years (SAT, 2019)

focus to the younger consumer market segment at least in the short term to mitigate risks (Smith, 2020).

SA Tourism stated that a Tourism Recovery Plan is being compiled for the sector, engaging with industry on scenarios and solutions going forward with a view to shape the policy environment once the pandemic is under control, with special attention to safety and security, and visa barriers (Smith, 2020). A recurring theme is the opportunity to reinvent current tourism business models, to leave behind elements that have not been working and to adapt to the evolving sector (Smith, 2020). A concerted effort is needed for a collaborative approach across stakeholders to find innovative solutions to ensure sustainability of an industry that has tremendous long-term growth and job creation potential. Given IATA (2020) predictions that domestic tourism is set to recover first, it should be useful for the industry to focus its attentions on boosting local tourism offerings in order to mitigate COVID-19 impacts in the in short term.

The Tourism Business Council SA is lobbying a "South Africa is Travel Ready" campaign and is currently running surveys to continue to build a strong case for re-opening. The Council is also calling for differentiation of risks within the industry e.g. the lower risks associated with game lodges and agritourism accommodation and other offerings. Coordinated media campaigns to support safe sectors and activities in tourism and support structured engagements between government and the wider sector (SATSA, 2020).

## 5. Agritourism

Agritourism is defined as “any activity in which a visitor contemplates farm landscape or participates in an agriculture process for recreation, leisure” (Tew & Barbieri, 2012:216) or educational purposes (Gill Arroyo, et al., 2013) not readily available in urbanised areas (Rogerson and Rogerson (2014b)). Agritourism overlaps with many other forms of tourism, as depicted in the figure below. Each aspect can be defined separately, however when the offering is farm-based, it can also be defined as agritourism (Van Zyl, 2019).

The agricultural sector benefits from agritourism given the increased demand for agricultural products and services, (DEAT, 1996) and it plays an important role in rural areas, contributing to GDP (Vink & van Rooyen, 2009). Agritourism presents an economic diversification strategy for agriculture and a vehicle to promote sustainable rural development, particularly where route tourism is leveraged (Engel & Wagner, 2019).



Figure 9: Agritourism related to other forms of tourism

Source: Van Zyl (2019)

Much like South Africa, Australian agriculture has been challenged by years of drought, prone to fires and floods. Farmers rely on agritourism to diversify income and to boost the sales of their produce. From the Australian standpoint, Wright (2020) predicts that the impacts of the coronavirus will persist in the industry for up to three years and reports that agritourism will need to focus on local travel and domestic demand for tourism following the lockdown. SA can learn from the Australian experience as people are showing more interest in where food is coming from, coupled with increased health awareness, farm stays and meaningful experiences (Whiteside and Hynninen, 2020). The role of e-commerce and social media has been highlighted as critical in connecting to markets during these restricted times (Wright, 2020; Leff, 2020).

### **5.1 Impacts in South Africa**

Few studies have been done on agritourism in SA, despite a wealth of research focussing on the tourism sector more broadly, whilst others have focussed specifically on wine tourism (Rogerson & Rogerson, 2014). As noted earlier, since the National Accounting Framework does not allow for calculating tourism as a distinct sector, the economic contribution of agritourism is not captured as part of the agricultural sector's income (Engel & Wagner, 2019).

In 2018, Statistics South Africa (STATSSA) released a discussion document on SA's accommodation industry where accommodation services were categorised by 'hotels, motels and inns', 'guest-houses and guest-farms' and 'other accommodation'. The guest-house and guest-farm category was reported to have generated income of R2.6 billion in 2016 with an average income just short of R800<sup>8</sup> per stay unit per night (STATSSA, 2018). The category's share of employment was reported to be 8% in 2015, with microenterprises accounting for the bulk of employment (92.9%)<sup>9</sup> (STATSSA, 2018).

Another example is SA's wildlife tourism (game-farms, game-lodges), a large contributor to agritourism with the majority of wildlife tourism located in the Limpopo province, contributing 9.8% of agriculture GDP in 2010 (van Zyl, 2019). WESGRO together with the Game-lodge Industry Group has reported on measures for the safe

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<sup>8</sup> Not including income of camping and caravan sites

<sup>9</sup> Whilst employment in wine tourism is yet to be officially quantified, some indications from academic studies (wine farm surveys) though outdated, put employment at least in excess of 7000 jobs (Hunter, 2017) (Bruwer, 2003).

opening of the industry and the wider domestic tourism industry (Hartley and Mills, 2020). In May 2020, the Tourism Business Council (TBCSA) published a comprehensive report on health and safety protocols to guide all aspects of the tourism value chain. The protocols are aligned to international standards to enable the safe opening of the industry as restrictions are eased (TBCSA, 2020). The game-lodge industry played a notable role in the development of these protocols and in terms of disaggregated risk, game-lodges are seen as establishments that can easily comply with health and safety standards (Hartlet and Mills, 2020).

The Census for Commercial Agriculture 2017 (STATSSA, 2020) does not directly classify income from agritourism; however, it captures "other" income categories. Table 1 provides a provincial breakdown of other income categories, for 2007 and 2017 respectively. Whilst it is not clear what has been measured in these income categories, it can be expected that the majority of the other income streams can be related to agritourism.

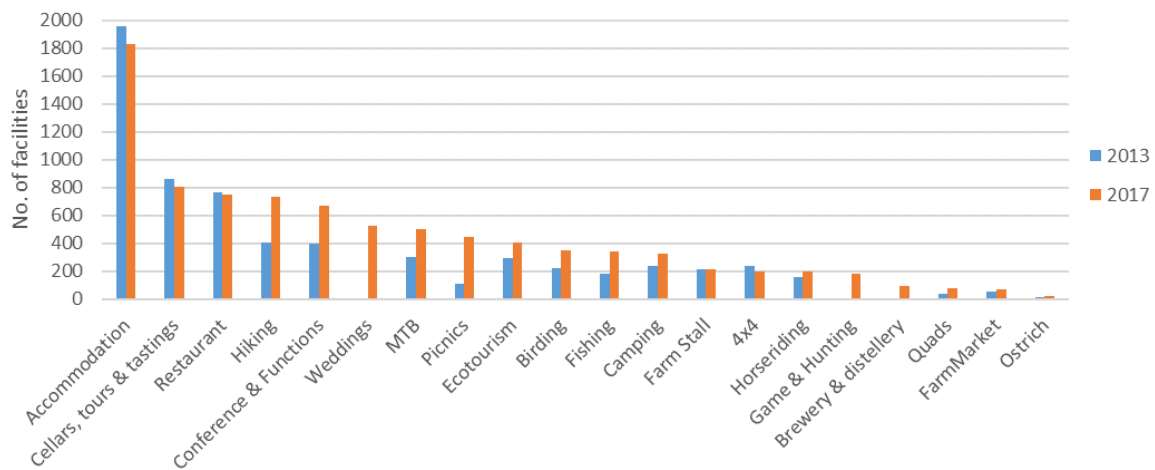
**Table 1: The value of income from agritourism in South Africa**

Province	Other Agricultural Income Value in Rand (‘000) <sup>10</sup>		Other services (non- agricultural) rendered Income Value in Rand (‘000)	Other Income in Rand (‘000)
	2007	2017	2017	2017
Eastern Cape	20 889	18 199	36 297	1 660 836
Free State	983	4 980	74 735	1 740 984
Gauteng	774	169	18 563	286 626
KwaZulu-Natal	259 963	751 382	94 926	1 684 497
Limpopo	18 662	663 408	65 630	1 777 185
Mpumalanga	95 040	663 408	239 876	1 545 170
North West	1 835	6 105	56 946	1 733 224
Northern Cape	115	64	29 419	895 745
Western Cape	44 165	49 726	264 163	2 294 427
<b>South Africa</b>	<b>442 426</b>	<b>1 507 003</b>	<b>880 555</b>	<b>13 618 694</b>

Source: STATSSA (2020)

<sup>10</sup> R'000 (current prices)

At a provincial level, the results from the Western Cape Department of Agriculture's Flyover Project (2013 and 2017) indicate the nature of agritourism offerings in the province, as shown in the figure below. With nearly 2 000 offerings, farm accommodation is the leading agritourism offering in the Western Cape followed by activities linked to wine cellars and wine tourism (WCDOA, 2018). To get a sense of the potential value of the top agritourism facilities impacted by COVID-19, accommodation and wine tourism is considered given its significant contribution.



**Figure 10: Agritourism offerings in the Western Cape**

Source: WCDOA (2020)

Wine tourism is one of SA's fastest growing industries (WESGRO, 2017) growing by more than 16% in 2018 (Booyesen, 2018). Although different numbers on the size of this sub-industry have been given lately, the estimated contribution to SA's GDP range between R6 million in 2013 (SAWIS, 2015). SA regulations in response to COVID-19 have imposed a strict ban on alcohol sales and distribution (briefly eased under Level 3) which will have knock on effects farm income and employment.

Another aspect to consider is the spending patterns of international wine tourists that have a higher average spend when compared to general tourists (Booyesen, 2018). If one excludes accommodation costs, 29.8% of the international market's average spend on wine tourism was between R501 to R1000 per day in 2017 (WESGRO, 2017). Given the purchasing power of international tourists and high spending on premium wines, it is expected that these tourists have high average spend on the other and related agritourism products and services too.

Going forward, tourism will need to adapt to the changes brought about by COVID-19 to be more accessible and affordable to the domestic market, promote health and safety measures along the value chain and appeal to offerings for smaller groups of tourists (Masihlelo, 2020; IATA, 2020). Domestic tourists will likely be cautious about spending given poor economic outlook and may look for offerings that provide value for money. Following the influence of social distancing measures, South Africans will look to enjoy nature, connect with loved ones and avoid mass tourism. Initially, people may prefer to look towards domestic travel, within travel time of average of three hours from their homes, so that they do not have to risk exposure by air travel (Smith, 2020). Whether considering the food we eat or where it comes from, or the way we travel, experts in the industry suggest that consumers will emerge more conscious and cautious. Sense of awareness of people and connections have been heightened through this pandemic and this will translate to people seeking not only space but also authentic, meaningful travel experiences to share with those closest to them (Smith, 2020).

Providing information and marketing hygiene and sanitary measures will be important, as many people will want to see that their safety is one of the top priorities. To continue to grow, the industry will need to embrace the opportunities made available by social media and e-commerce (Smith, 2020). An example includes the recent use of online wine tasting done by Leopard's Leap, La Motte and De Grendel, amongst others. An expert discussion led to the consensus that people will need to gain confidence in travel again and this may take a long time. Agritourism is well-positioned to meet predicted changes in consumer behaviour by following the health and safety protocols as set out by the TBCSA.

### **5.1.1 Impact on SMMEs**

Although tourism provides livelihoods to small business owners, it also creates jobs for various occupations, including low-skilled and vulnerable groups. Lockdowns around the world have led to reduced labour supply, as people are restricted to their homes, unwell and/or caring for dependents (OECD, 2020). This has also led to breaks in supply chains resulting in unavailability and possibly shortages of goods and services. On the other hand, demand for goods and services has also seen a dramatic reduction as consumers may have experienced losses in income, have increased



concerns around becoming infected or have reduced spending given amplified uncertainties about the duration and extent of the pandemic (OECD, 2020).

Sectors such as transport and tourism have been particularly affected by these impacts and the proportion functioning as Small Micro and Medium Sized Enterprises (SMMEs) have been severely affected in their ability to function and in essence, survive the pandemic. It is expected that SMMEs are more vulnerable to the restrictions that have been implemented than large firms given their higher levels of vulnerability and lower resilience due to size and the costs associated with adapting to digitization or accessing technology (OECD, 2020; Smith, 2020). This will need to be confirmed as soon as data become available to measure the full impact of the pandemic.

The concentration of SMMES makes the tourism sector highly sensitive to economic shocks (OECD, 2020; Smith, 2020). As part of the Tourism Recovery Plan, SA's Department of Tourism has set up a Tourism Relief Fund providing once-off grants<sup>11</sup> to SMMEs that can provide evidence of being impacted by the pandemic (Smith, 2020). Capped at R50 000 per entity, grant funding can be utilised to subsidise expenses towards fixed costs, operational costs, supplies and other pressure cost items. Categories eligible to apply for the Tourism Relief Fund include the following:

- Accommodation establishments: Hotels, Lodges, Bed and Breakfast (B&B's), Guest Houses and Backpackers.
- Hospitality and related services: Restaurants (not attached to hotels); Conference venues (not attached to hotels); Professional catering and attractions as well as
- Travel and related services: Tour operators; Travel agents; Tourist guiding; Car rental companies; and Coach Operators (Smith, 2020).

### **5.1.2 Impact on Smallholder Farmers**

The impact of COVID-19 is leading to recession and though not yet measurable, SA's GDP will most likely contract more than 6% (Setumo, 2020). The pandemic is set to put further pressure on already challenged smallholder farmers that are faced with rising input costs, limited market access and limited bargaining power (amongst others), but COVID-19 may also present some opportunities as referred to in Table 2.

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<sup>11</sup> The application window for the Tourism Relief Fund open until 31 May 2020.

**Table 2: Threats and Opportunities for Agritourism Enterprises**

<b>Activity</b>	<b>Threat</b>	<b>Opportunity</b>
On farm activities and produce sales	<ul style="list-style-type: none"> <li>-Halt of all activities under level 5 hard lockdown, loss of income and impact on livelihoods</li> <li>-Level 4 restrictions on sale of alcoholic beverages, travel restrictions and number of people allowed to gather for events, restrictions on sit-down dining</li> <li>-Level 3 sit-down dining, exercise allowed under certain conditions</li> </ul>	<ul style="list-style-type: none"> <li>-Re-evaluating and adapting business and obtaining CIPC certificate as essential service for home deliveries, farm stall sales, online fresh produce sales e.g. Anna Beulah Farm</li> <li>-Education e.g. virtual experiences such as online wine tasting e.g. De Grendel, Beyond the Vine, virtual dining e.g. Grub and Vine or educational activities for kids (such as being done in Italy (ENRD, 2020))</li> <li>-Proactive education for visitors and staff, preparing to receive visitors e.g. Redberry Farm register at entrance, sanitizing stations, informative posters, seating meeting social distancing requirements, sanitizing protocols at pay stations/scan to pay options, adding online shop</li> <li>-Online wine sales/vouchers</li> <li>-Take away menus coupled with marketing farm/vineyard walks and mountain biking e.g. Klein Roosboom wine farm, Hillcrest Estate Roadhouse/Drive-in</li> </ul>
Market Access Fresh produce/informal markets	<ul style="list-style-type: none"> <li>-Level 4 restriction on movements and activity in informal market</li> <li>-Need for cold storage</li> <li>-Reduced salaries and/or job losses</li> </ul>	<ul style="list-style-type: none"> <li>-New marketing approaches e.g. competitiveness following TBCSA protocols, adapted engagement and improved use of social media</li> <li>-Increase in household demand of fresh produce and staple foods e.g. U-pick activities adapted to home deliveries or packages sales</li> <li>-New business/e-commerce sales. Existing online stores adding fresh produce line e.g. Faithful to Nature</li> <li>-Using technology to decrease costs</li> </ul>
Accommodation	<ul style="list-style-type: none"> <li>-Level 4 restrictions resulting in no income from on-farm accommodation.</li> <li>-Level 3 restrictions eased to allow for accommodating business travellers</li> </ul>	<ul style="list-style-type: none"> <li>-High rates of infection concentrated in urban centres, areas with high population density. Tourists may feel safer exploring rural areas.</li> </ul>
Labour	<ul style="list-style-type: none"> <li>Transport restrictions and/or job losses</li> </ul>	<ul style="list-style-type: none"> <li>Ability to transition into online food delivery or logistics</li> </ul>
Government support	<ul style="list-style-type: none"> <li>Potential reallocation of budget towards health or other COVID-19 fiscal recovery measures</li> </ul>	<ul style="list-style-type: none"> <li>Interest rate cuts and government relief measures for SMMEs and smallholder farmers</li> </ul>

Source: Setumo (2020) and own compilation

### 5.1.3 Government Response

Various fiscal recovery measures have been introduced around the world, at different levels. The G20 and EU Tourism Ministers met on 24 and 27 April 2020 respectively, to discuss striking a balance between protecting visitors and tourism workers and ensuring business survival along the supply chain with a special focus on SMMEs (OECD, 2020). Policy responses include, but are not limited to, providing health information and advisories, introducing measures that address liquidity (payment deferrals) and considering extending further access to credit to strengthen resilience (OECD, 2020).

Some fiscal recovery measures have been earmarked to support the macro economy for example, central banks cutting lending rates and commercial banks offering loans and under certain criteria, debt payment relief. In some countries, businesses have had to reduce working time or staff employed or grant leave (paid, unpaid, sick or special leave). Others have responded with tax relief or deferral, social security, debt and rent and utility payments. In some cases, responses directed at SMMEs have been introduced such as loan guarantees, grants and subsidies, and structural responses to embrace e-commerce. SMMEs are likely to have less resilience to shocks and less flexibility to cope with impacts. With limited resources, access to capital and adoption rates of technological innovation, the period of survival is shorter than for bigger firms (OECD, 2020).

In SA, the government's approach in responding to the crisis has been threefold:

- Debt moratorium (deferral),
- Direct lending (financial instruments) and
- New markets (structural response) (OECD, 2020).

The following overview and timeline outlines further detail of SA's response:

- 19 March 2020: Reserve Bank cuts repo rate by 100 basis points (6.25% to 5.25%)
- 18 March 2020: government announced package to support SMMEs
  - Debt Relief Fund
  - The Business Growth or Resilience Facility
- 14 April 2020: Reserve Bank cut repo rate by a further 100 basis point to 4.25%
- 21 May 2020: Repo rate cut by further 50 basis points

- 24 July 2020: Repo rate cut by 25 basis points

Furthermore, government has made a R1.2 billion fund available to support smallholder farmers in keeping their businesses operational via a voucher system. Eligible<sup>12</sup> farmers with annual turnover between R20 000 and R1 million may apply for assistance from the Department of Agriculture, Land Reform and Rural Development with horticulture and poultry being prioritised (DALRRD, 2020).

Other fiscal policy responses include the setting up of a Solidarity Fund, wage payments through the Temporary Employee Relief Scheme, payments for infected employees from the Compensation Fund and tax subsidies (of up to R500 per month for the next four months) for private sector employees earning below R6 500 under the Employment Tax Incentive<sup>13</sup> (OECD, 2020).

The Tourism Product Development Fund is a source of funding for new and existing tourism products and experiences, or for the upgrading thereof. A total of R5 million has been made available for disbursement.<sup>14</sup>

Whilst SMMEs and entrepreneurs continue to face immense challenges during this crisis these government initiatives aim to support small businesses to survive this crisis period and potentially spark innovation.

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<sup>12</sup> Focused on BEE entities

<sup>13</sup> Tax-compliant businesses with a turnover of less than R50 million will be allowed to delay 20% of their pay-as-you-earn liabilities over the next four months and a portion of their provisional corporate income tax payments without penalties or interest over the next six months. This intervention is expected to assist over 75 000 small and medium-term enterprises.

<sup>14</sup> Closing date for applications 14 August 2020

## 6. Conclusion

This report sought to provide a brief overview of the initial impacts of COVID-19 on SA agritourism and the wider tourism sector and put forward opportunities that may arise out of the crisis in order to revive the industry beyond this crisis and build a better future.

South Africa has been quick to respond to the rapidly evolving crisis; however the delivery is inconclusive at this stage. Monitoring the impact of policy measures is important and coordination of response and action is required at all government levels, including exit strategies. As the rate of infection continues to increase and lockdown persists, scenarios for longer-term support strategies may be required.

A sharp decline in tourist arrivals are already apparent for Quarter 1 2020, but the full extent of the economic impact of coronavirus will not be known for some time, until detailed sectoral surveys or other data confirm the direct and indirect impacts. In the interim, agritourism and the wider tourism industry is under immense pressure to survive without receiving income for many months. Operators that are able to ride out the storm will need to show strong, creative, innovation and resilience skills to rebuild the industry. Small businesses have shown innovation in this period by leveraging technology and the e-commerce space, and adapting to essential services and goods e.g. manufacturing protective equipment, fresh produce delivery. Entrepreneurial ideas for destinations, for products and sales and in general for new business models, inclusive of e-commerce, will be key in assisting the sector in mitigating the impact of the pandemic and kick-starting recovery.

With infection rates being higher in urban centres, rural areas will be sought after by travellers, upon easing of restrictions, and agritourism offerings will need to be geared towards this. The domestic market will be key to recovery efforts as consumers will be interested in travelling close to home and in their own cars, particularly city dwellers seeking more space. Industry experts suggest that consumers will emerge more conscious and cautious, both in terms of food provenance and in terms of authentic travel experiences. Sense of awareness of people and connections have been heightened through this pandemic and this will translate to people seeking not only space but also meaningful travel experiences to share with those closest to them (Smith, 2020).

Agritourism is well- positioned to meet these changes in consumer behaviour whilst respecting social distance and will need to embrace opportunities for adaptation, by pledging to the COVID-19 protocols released by the Tourism Business Council SA.

Further recommendation is that support be provided to agritourism operators on:

- Implementing COVID-19 measures such as cleaning materials, PPE equipment, staff training;
- Business support services in association with Wesgro (and/or other relevant government department) regarding communication with clients;
- Short-term interim solutions e.g. more flexible booking policy to offer guests peace of mind, voucher system valid for 1 year or 18 months; and
- Domestic campaign to encourage South Africans to visit agritourism facilities similar to- or add on to existing tourism campaigns (such as that promoted by SA Tourism and the Tourism Business Council SA).

There is a call for the industry operators to offer ideas to associations and get behind coordinated media campaigns and webinars to support the opening of safe activities in tourism, support structured engagements between government and the wider sector (SATSA, 2020).

Data is required to further quantify the impact of the coronavirus on agritourism in the Western Cape and to further build the case to support agritourism and the tourism sector at large.

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