

# TOURISM RISK RATING



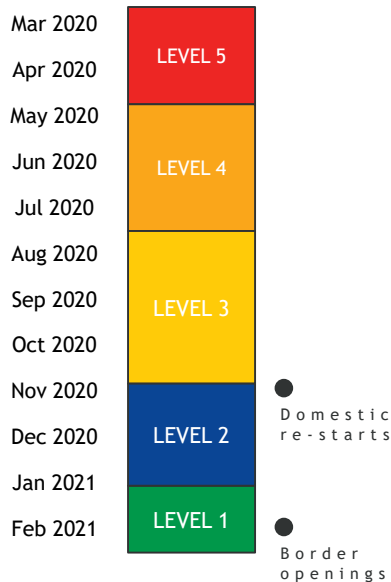
SOUTH AFRICAN TOURISM

Having been assessed as a Level 1/2 activity within the country’s risk-adjusted framework, the industry faces a significant period of constrained activity unless measures can be put in place to mitigate transmission risk.



External, collective consequence of how SA responds to the pandemic.

Rating of the inherent risk of specific value chain activities within the country risk framework



**LEVEL 2**

**LEVEL 1**

- The current risk rating for tourism activities is level 1 and 2
- Based on Business-As-Usual specifications

RISK REDUCTION OPPORTUNITY

Opportunity for the sector to “de-risk” itself by:

- Implementing health protocols that are broadly mandated/accepted
- Incorporating a sub-sector approach to health mandates
- Assessing sub-sectors into different risk categories

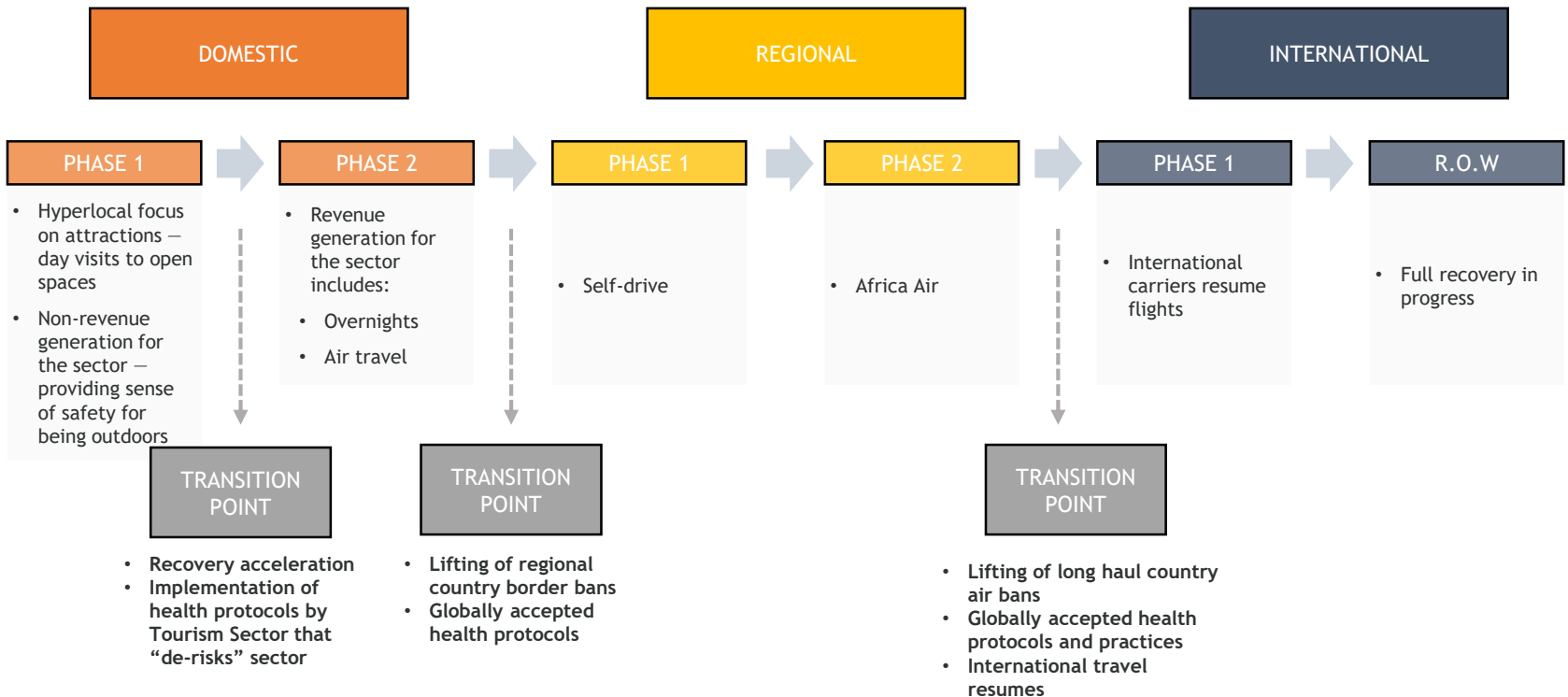
**LEVEL 3**

- Credible implementation of health protocols
- Possibly resulting in a risk upgrade to Level 3
- Risk level gaps are known to be closed
- Sector can speedily recover

**DISCLAIMER**  
*Timeframes are for illustration and are Dependent on Pandemic Trajectory*

# 'LOCAL FIRST' RECOVERY

Tourism recovery will experience a number of phases, from hyper-local community attractions, through broader domestic tourism, regional land and air markets, and lastly resumption of world-wide international travel.

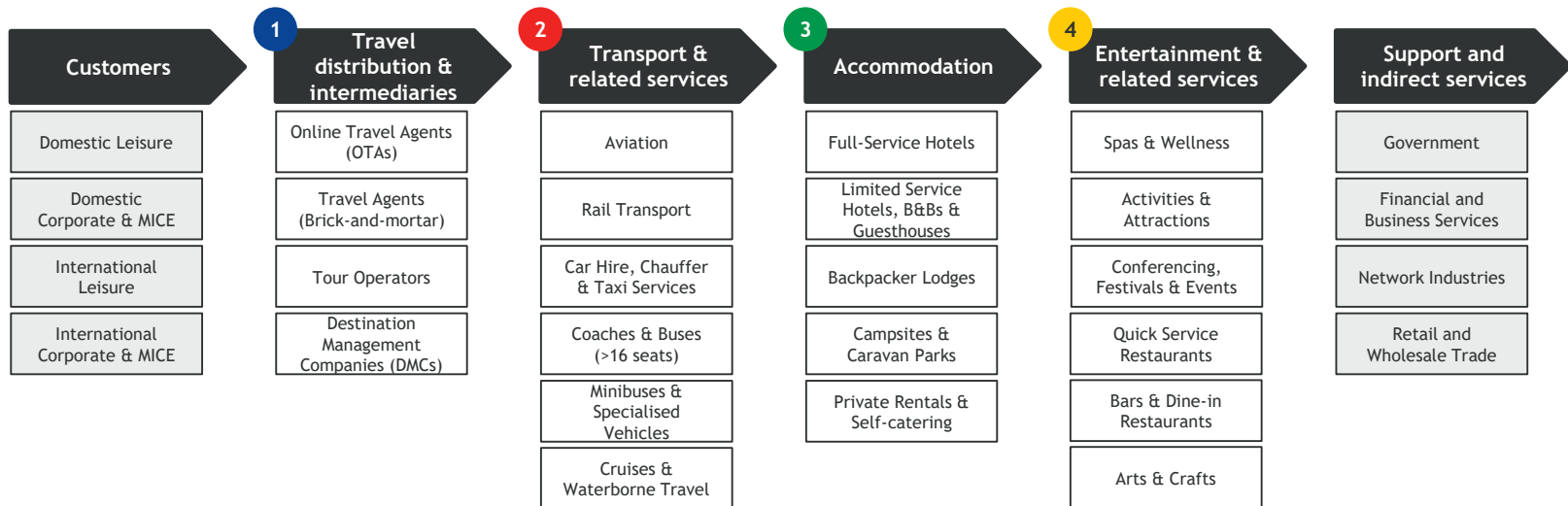


# TOURISM VALUE CHAIN



SOUTH AFRICAN TOURISM

Tourism is a vibrant and complex value chain with a wide variety of activities serving many different markets.



**\*\* Above Sub-Sectors can be broken down even further \*\***