## TOURISM RISK RATING



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.

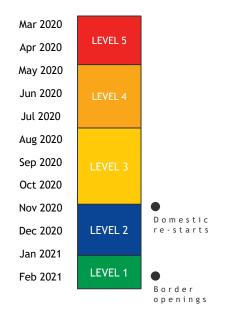
### **COUNTRY RISK LEVELS**



### TOURISM SECTOR RISK LEVEL

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 "derisk" 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

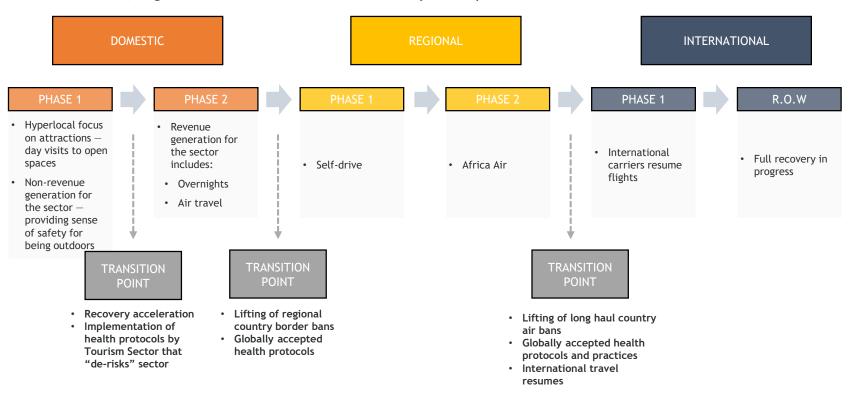
- Credible implementation of health protocols
- Possibly resulting in a risk upgrade to Level 3
- Risk level gaps are known to be closed
- Sector can speedily recover

## **DISCLAIMER**

Timeframes are for illustration and are Dependent on Pandemic Trajectory

## 'LOCAL FIRST' RECOVERY

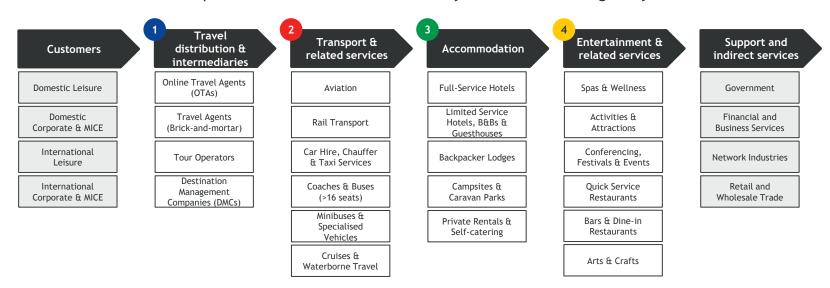
Tourism recovery will experience a number of phases, from hyper-local community attractions, through broader domestic tourism, regional land and air markets, and lastly resumption of world-wide international travel.



# TOURISM VALUE CHAIN



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 \*\*