



RECOVERY SCENARIOS

Tourism recovery will depend both on South Africa’s pandemic experience and that of global source markets. Three scenarios present the range of possible outcomes, with Scenario B (Fragile Recovery) currently the core scenario.

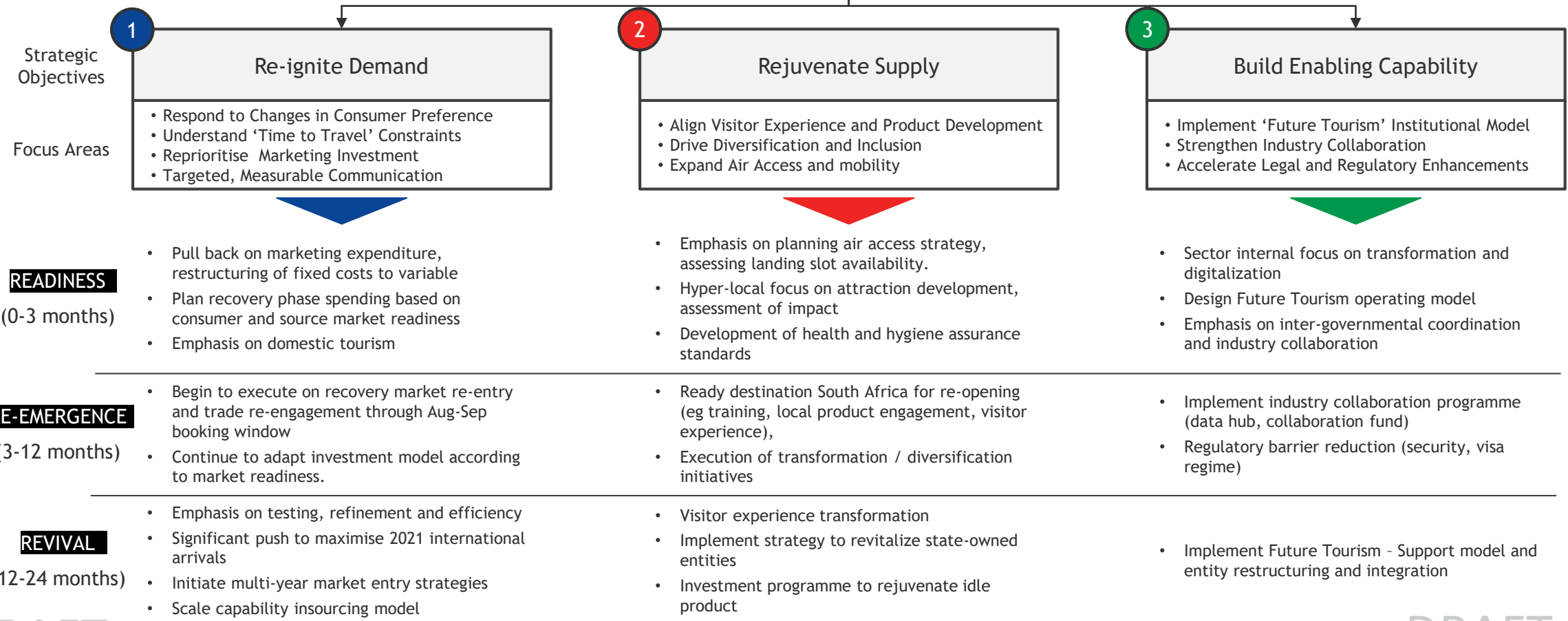
	Pandemic Shape	Description and Markers	Recovery Timeframe	Implications
CORE OUTLOOK	HIGH ROAD A STRONG RECOVERY 	<u>Scenario Description</u> <ul style="list-style-type: none"> Recovery continues without meaningful secondary infection. SA under control. <u>Markers</u> <ul style="list-style-type: none"> Trend lower cases/mortality. Consistent easing Vaccine found 		<ul style="list-style-type: none"> Generalized global re-opening (AUG-DEC) SA borders open from OCT. Marketing trigger (JUN/JUL) Likely booking window (AUG-DEC) Domestic and international travel windows (SEP & DEC onwards). Best case outcome for local product survival and viability
	MIDDLE ROAD B FRAGILE RECOVERY 	<u>Scenario Description</u> <ul style="list-style-type: none"> Recovery is gradual and unstable. <u>Markers</u> <ul style="list-style-type: none"> Clusters of material second wave / reinfections Intermittent / conservative easing measures. 		<ul style="list-style-type: none"> Gradual global re-opening (NOV-FEB) SA borders open from FEB. Marketing trigger (SEP) Likely booking window (NOV-FEB) Domestic and international travel windows (NOV & MAY onwards). Some product survival and viability
	LOW ROAD C PROLONGED PANDEMIC 	<u>Scenario Description</u> <ul style="list-style-type: none"> Prolonged global pandemic, multiple infection waves. <u>Markers</u> <ul style="list-style-type: none"> Second infection wave that is not stabilised: high rate of community/geographic spread No meaningful easing 		<ul style="list-style-type: none"> No meaningful global recovery until late 2021 Borders remain closed for 12-18 months Domestic travel resumes in mid-2021 Limited local product survival and viability



RECOVERY FRAMEWORK AND HORIZONS

Three strategic objectives are central to South Africa’s recovery; re-igniting demand, rejuvenating supply and strengthening enabling capability.

TOURISM RECOVERY STRATEGY





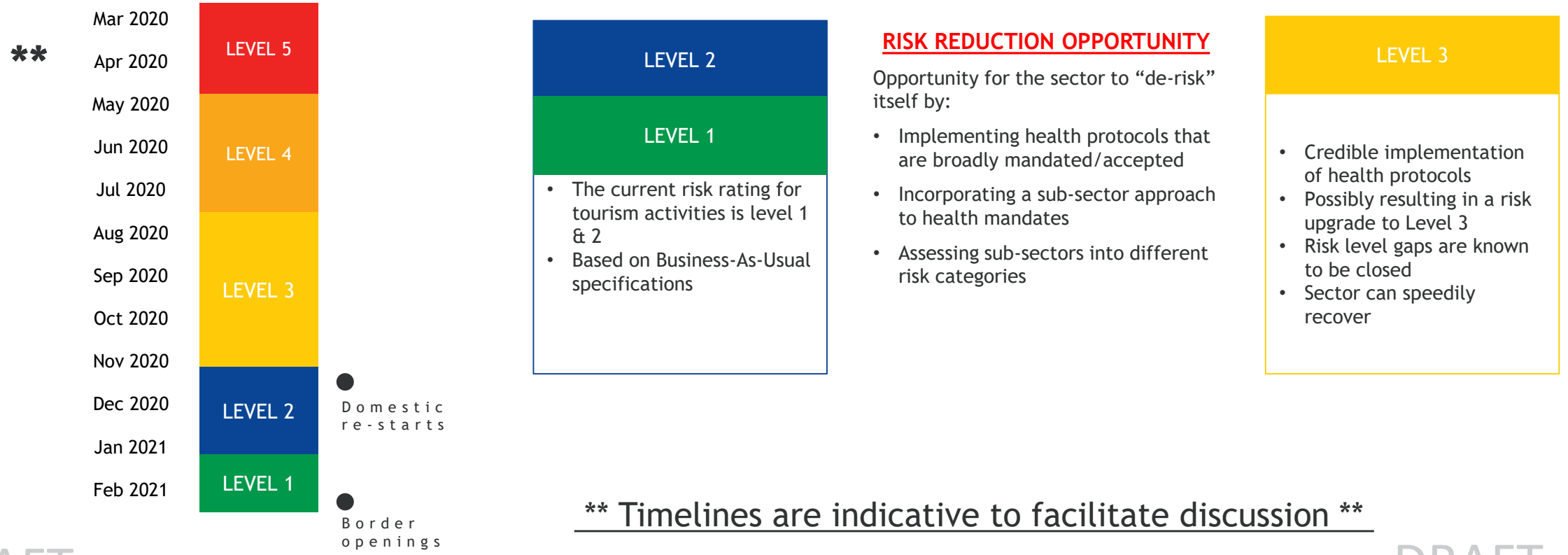
RISK-ADJUSTED APPROACH - IMPLICATIONS

Having been assessed as a Level 2 activity within the country’s risk framework, the industry will use the current period to implement health standards that provide assurance and may result in a re-rating to Level 3.



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



'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.

