

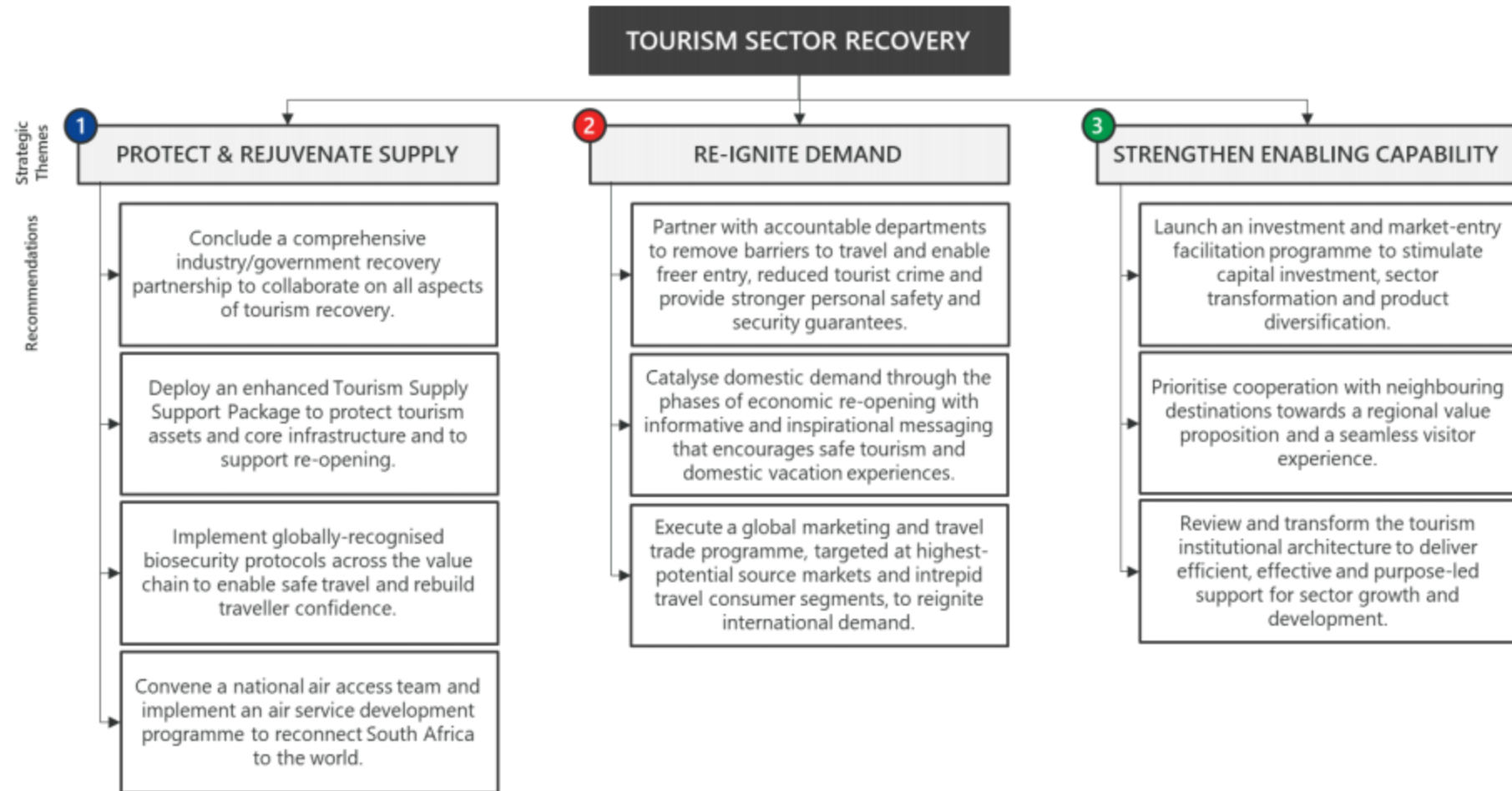
# SOUTH AFRICA'S TOURISM RECOVERY STRATEGY

South African Tourism CEO - Sisa Ntshona  
2 March 2021

## Current state of tourism

- Globally, tourism has regressed by 30 years, currently operating at 1990 levels
- Our key international source markets are currently experiencing 2<sup>nd</sup> and 3<sup>rd</sup> waves of infections and some are under strict lockdowns
- Germany and the UK are currently under lockdown
- Entry into the US, Australia and New Zealand for South Africans is currently prohibited
- 2021 has been dubbed as the year of the vaccine. The roll out of vaccines both globally and locally will be critical in rebuilding confidence back into travel

# Three Pillars for tourism sector recovery



## Where to Invest...

In-depth analysis to determine priorities for marketing investment for the next 3-5 years was undertaken in mid 2020

Due to unlimited resources, scanning and filtering was done to select markets with the most ROI

The selection criteria uses 33 variables including:

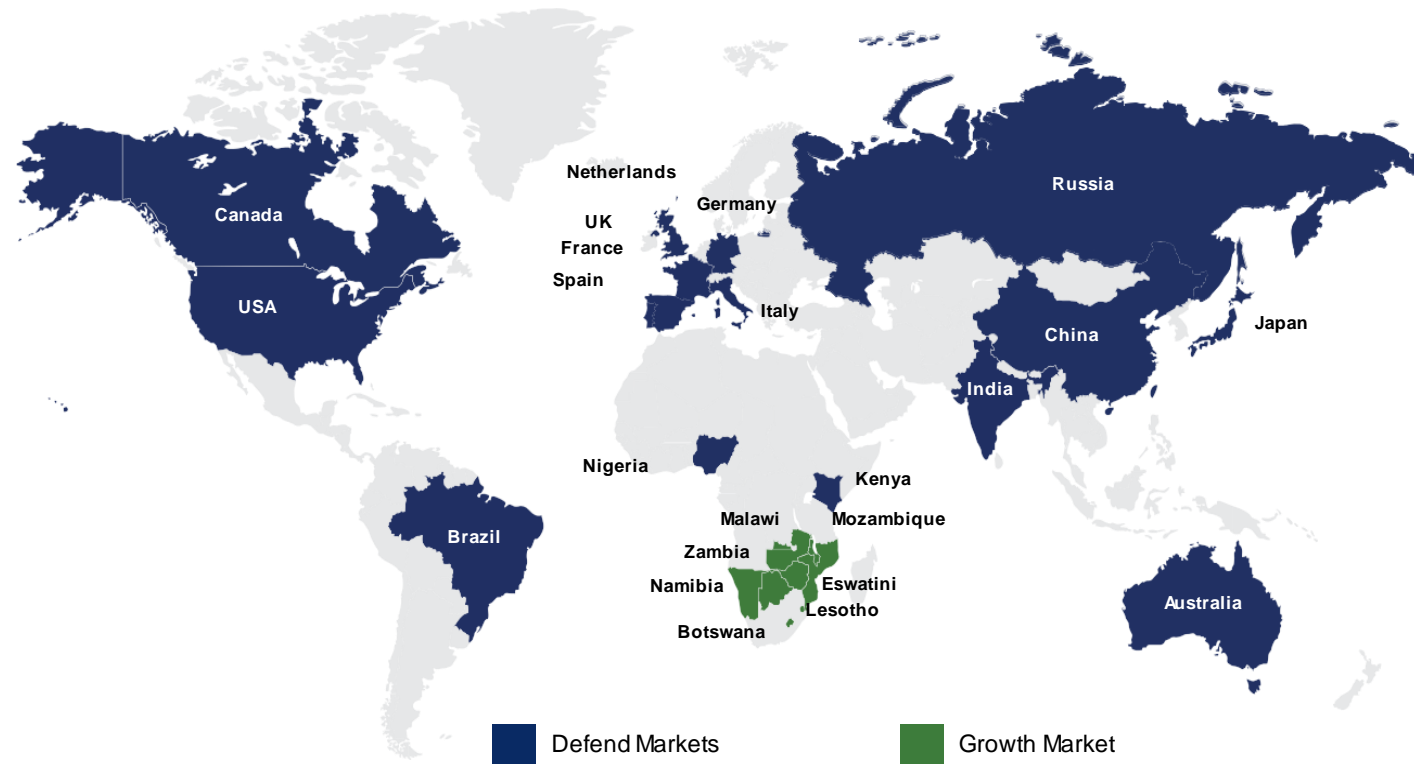
- GDP and growth prospects
- Ease of travel (visas)
- Performance and Outlook
- Ability to win in the market
- Return on past investments

In total, 24 markets/countries have been identified and segmented into:

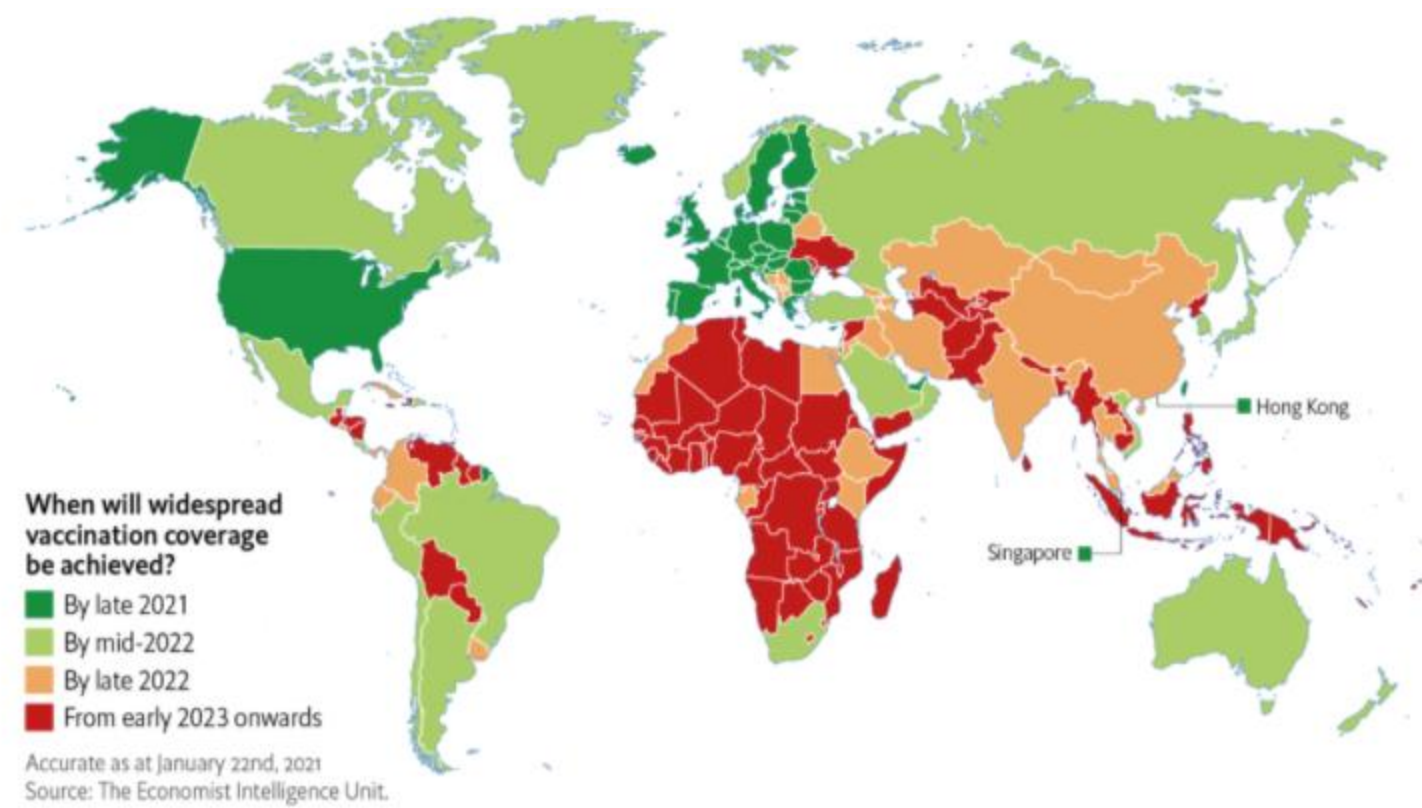
- 16 growth markets
- 8 defend markets

These 24 prioritized markets accounted for 92% of all international trips in 2019.

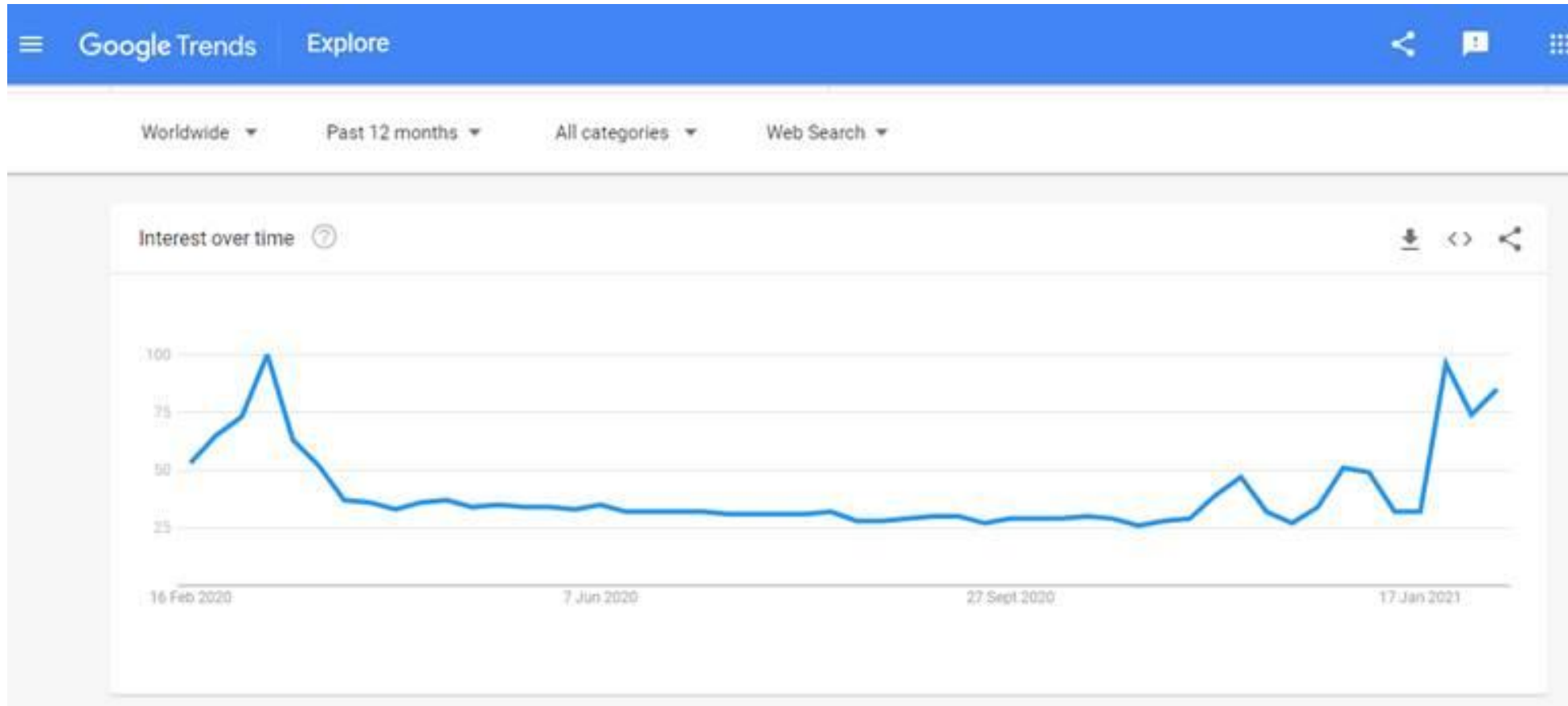
# Marketing Investment Framework



# Year of the Vaccine...



# Outlook for 2021: Global interest in South Africa in the past 12 months





# Thank You