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**CONTENT ADVISORY NOTE**

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| **Committee** : Portfolio Committee on Tourism**Content Advisor** : Dr Sibusiso Khuzwayo**Date** : 27 May 2020 |
| **Topic for Discussion**This briefing provides issues for the Committee consideration on the:1. South African Tourism Five-Year Strategic Plan (2020/21 – 2024/25).
2. South African Tourism Annual Performance Plan (2020/21).
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| **Legislative Framework**1. Chapter 3 of the Tourism Act (Act No. 3 of 2014) mandates South African Tourism to market South Africa internationally and domestically as a preferred tourism and business events destination, ensure that tourist facilities and services are of the highest standard, and monitor and evaluate the performance of the tourism sector.
2. Section 27 (i) of the Public Finance Management Act No. 29 of 1999) stipulates that the Minister must table the annual budget for a financial year in the National Assembly before the start of that financial year or, in exceptional circumstances, on a date as soon as possible after the start of that financial year, as the Minister may determine.
3. In the wake of the COVID-19 pandemic and the necessary national response, Section 27(2)(a) of the Disaster Management Act of 2002 authorises the release of any available resources of national government. This may have an impact on the financial resources available for South African Tourism to pursue its marketing mandate.
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| **Policy Framework** The White Paper on the Development and Promotion of Tourism in South Africa (1996), amongst other things, stipulates that the South African Tourism Board (SATOUR) has attempted to fill the gaps, in many instances carrying out the functions of both national government and statutory body - grading and classification of hotels, licenses, research and development, training, marketing, promotion and product development. The review of the tourism policy to be undertaken by the Department of Tourism should succinctly define the role of South African Tourism in line with the legislation. The policy should also be clear on the mandate of Provincial Destination Management Organisations and municipalities with regard to marketing and related destination promotion activities. |
| **Background**In March 2020, the Minister of Tourism tabled the Five-year Strategic Plan (2020/21 -2024/25) and the 2020/21 Annual Performance Plan (APP) for South African Tourism. However, due to the impact of COVID-19 on the tourism sector, the Minister withdrew the Annual Performance Plans of both the Department and South African Tourism in the letter dated 8 May 2020 as published in the ATC No 51 – 2020. The Minister tabled a revised Annual Performance Plan on the 20th May 2020. The Strategic Plan has taken into consideration the impact of COVID-19 on the sector. The Entity has lost important revenues that augmented the transfers from the Department of tourism. The entity has been forced to put to a halt a number of international and domestic marketing activities as the tourism sector remains closed internationally and domestically. |
| **Allocated Budget**The initial projected revenue streams for the 2020/21 MTEF were as follows:Table 1: Projected Revenue for 2020/21

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| --- | --- | --- | --- | --- | --- |
| **Revenue** | **2018/19** | **2019/20** | **2020/21** | **2021/22** | **2022/23** |
| **(R’000)** | **Audited** | **Approved** | **Adjustment** | **Revised Estimates** | **Estimates** | **Estimates** |
| Government grant | 1,208,048 | 1,254,161 | -19,150 |  1.304,306 | 1,372,673 | 1,425,682 |
| TOMSA Levies | 121,516 | 137,356 |  | 144,224 | 152,156 | 159,460 |
| Indaba, Meetings Africa & Other Exhibitions | 43,945 | 60,192 |  | 63,503 | 66,996 | 70,681 |
| Grading fees | 21,739 | 23,824 |  | 25,134 | 26,516 | 27,789 |
| Sundry revenue | 52,665 | 22,324 |  | 23,552 | 24,847 | 25,570 |
| TOTAL | 1,447,913 | 1,497,85 |  | 1,560,719 | 1,643,188 | 1,709,182 |

However, the COVID-19 has affected projections from other sources of revenue. The Entity reported that the shutdown of the sector has resulted in nil TOMSA Levy collections. There is no income expected from INDABA nor Meetings Africa during 2020/21 fiscal year. There is also no revenue expected from the grading fees in the 2020/21 financial year. This only leaves the Entity with the 1.304,306 from the government.The Department indicated that South African Tourism will be implementing the Tourism Relief Fund (TRF) on behalf of the Department. However, the TRF funding is not reflected as a source of funding in the 2020/21 financial year.The total initially projected budget for South African Tourism in the 2020/21 financial year was R1.56 billion, increasing to R1.7 billion in 2022/23. The huge portion of this budget is the government grant which will increase from R1.3 billion in 2020/21 to R1.43 billion in 2022/23. It should be noted that there has been a reduction of -R19.2 million in the government grant transferred by the Department of Tourism. The reduction in the budget reduces the financial capacity of the Entity to conduct its business. The Board of South African Tourism should make innovate decisions to maximise impact using the available budget.**The seven strategic focus areas identified by South African Tourism in the MTEF**South African Tourism has identified seven focus areas to be pursued in the 2020/21 – 2024/25 MTEF period. These focus areas are as follows:1. Brand

The Entity wants to promote South Africa as a destination of Choice. The emphasis is on separating country brand from corporate brand. The Entity should clarify this to the Committee, in terms of messaging and protecting market share from various brand killers such as negative reporting, human-animal interactions, crime, and others.1. Domestic market

The Entity has identified domestic tourism as one of the important tourism recovery agents. The Entity plans to partner with provinces to develop domestic holiday packages and experiences. The Entity should, however, work closely with the industry to make domestic tourism affordable to all South Africans.1. International tourism

The country has set a target of 21 million international arrivals by 2030. The Entity should revise its Market Investment Framework to ensure the achievement of the 2030 targets. The Entity should activate domestic tourism to reduce reliance on international tourism.1. Demand creation

The Entity has always responded to demand. It is high time that the Entity created demand for South African products and work with Destination Management Companies (DMCs) to package the new products to create more demand.1. Visitor experience

The Entity will focus on diversifying and inclusion in the tourism supply. This will include programmes for promoting market access to SMMEs and enabling smaller players to enter the sector through quality verification. The Committee should monitor this closely, especially the inclusion of tourism products in the VTSDs.1. Organisational efficiency

The issue of the rationalisation of entities with the similar mandate is currently being considered by the government. This has a bearing on the mandate of South African Tourism under the Ministry of Tourism and Brand South Africa under the Minister in the Presidency. The Committee should follow these developments closely whilst conducting oversight over the governance, internal controls, financial management, human resources, and other elements to ensure organisational efficacy and effectiveness. 1. Stakeholder engagement

Stakeholder engagement is a make-or-brake cluster of activities that should be undertaken by the Entity to define its success or definite failure. The Committee should conduct stringent oversight on how the Entity engages various stakeholders at both private and public sector levels, especially the Tourism Business Council of South Africa and the provincial Destination Management Organisations (DMOs).**Upfront Payments and Foreign Currency Exposure*** The Committee should monitor the South African Tourism’s foreign currency exposure as this used to be a challenge in the past, causing a deficit in the allocated budget.
* The National Treasury has allowed South African Tourism to conduct upfront payments to mitigate foreign currency exposure.

**The Tourism Relief Fund*** The corona virus dubbed COVID-19, has dealt a heavy blow to the tourism sector worldwide, including in South Africa.
* The government had to provide a R200 million to be used towards fixed costs, operational costs, supplies and other pressure cost items.
* This R200 million will be disbursed and managed by South African Tourism. More details should be given by the Entity on how the funds will be managed.
* This is a once-off grant capped at R50 000.00 to ensure sustainability during and post the COVID-19 pandemic.
* The Minister has to indicate which South African Tourism Programmes were affected by availing the R200 million, and how this will affect the five-year strategic plan and the annual performance plan already tabled to Parliament.
* There has been some opposition to including the BBBEE criteria in the criteria, and the Minister has been taken to court by AfriForum and Solidarity who claimed this requirement was” racist”. The case has since been dismissed by the Constitutional Court.
* Whilst the Tourism Relief Fund is welcome, a more comprehensive recovery plan is needed for the tourism sector to flourish again.

**Impact of COVID-19 on South African Tourism Activities**The pandemic is already having an indelible impact on South African Tourism activities and the country’s economy at large.* The core mandate of South African Tourism which is to market South Africa internationally and abroad is adversely affected as marketing activities have come to a ground halt due to the COVID-19 pandemic.
* The international tourism is closed until February 2021 as the international flights remain grounded, all international travel restricted, and bookings cancelled. This will drastically reduce the number of international arrivals. In turn, this will impact negatively on the 2030 target of 21 million arrivals by 2030.
* The domestic tourism season is closed until December 2020. The gains made in the historic growth of holiday trips in 2019 will be completely lost as the domestic tourism market has to reboot.
* The closure of the tourism sector means the TOMSA Levy collectors will not collect any revenue in the current financial year, which will strain the South African Tourism resources and planned collaboration activities with the private sector through the Tourism Business Council of South Africa.
* The South African Conventions Bureau cannot conduct any business tourism activities, the conferences and meetings have been cancelled. This will have a negative impact on the contribution of business tourism to the GDP of the country.
* The closure of the tourism business sector means there will be no revenue generated through INDABA and Meetings Africa.
* This calls for the Entity to put systems in place that will give it a head start when the global tourism markets, and global economy in general, gradually opens post-COVID-19.

**Possible Impact of Downgrades by Rating Agencies** * The rating agencies, Moody’s and Fitch have downgraded South Africa’s sovereign credit rating.
* The weaker domestic growth and greater fiscal risks have resulted in a downgrade by Moody’s credit rating agency and confirmation of a negative outlook by Fitch.
* Taking the corona virus pandemic into consideration, the South f Reserve Bank expects the GDP in 2020 to contract by 6.1 percent.
* The GDP is only expected to grow by 2.2 percent in 2021 and 2.7 percent in 2022.
* The Reserve Bank’ s headline consumer price inflation forecast averages 3.6 percent for 2020, 4.5 percent for 2021, and 4.4 percent in 2022. The forecast for core inflation is lower at 3.8 percent in 2020, 4.0 percent in 2021, and 4.2 percent in 2022.
* These economic indicators indicate that the disposable income available for tourism will be reduced, particularly for domestic tourism.
* The continuing lockdown, with Thursday 22 May 2020, the day of writing this document, being the 57th Day of lockdown, has also created a precarious situation that is causing job losses in general, and closure of tourism businesses and SMMEs in particular.
* The South African Reserve Bank has responded by reducing the interest rates to boost the economy.
* The economic downgrade by rating agencies, coupled with the corona virus pandemic have not been effectively factored in the allocated budget for South African Tourism.
* The Entity may need to revise its targets based on these factors to ensure that the targets set for the MTSF are SMART (Specific, Measurable, Attainable, Realistic, and Time-bound).
* In that regard, the Entity may need to table an addendum to the 5-year Strategic Plan and the Annual Performance Plan.

**Tourism Recovery Plan*** In the meeting of the 17th March 2020 the Committee urged South African Tourism to develop a Tourism Recovery Plan for South Africa post COVID-19.
* The Entity has initiated the process of developing the National Tourism Recovery Strategy (NTRS).
* The approach of the Entity to tourism recovery is as follows:
* **Re-igniting demand** – this entails conserving the marketing investment. The marketing investment framework should be evolving to incorporate multi-year investment cycles to optimise scarce resource deployment. The Entity should redirect its energy to domestic tourism, which the Committee is fervently advocating for.
* **Protecting the supply side of tourism** – the Entity will focus on strengthening the visitor experience and ensure high quality standards of the country’s tourism offerings.
* **Strengthening enabling capability** – this entails strengthening collaborations and partnerships between the Entity and the industry.
* The Entity has indicated that the 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 travel.
* The recovery phase will initially be driven by domestic tourism business travel and then by rising domestic leisure demand.
* The international recovery will begin in Asia, North America and European markets in six months.
* If Africa escapes the pandemic, both air and land markets will likely be early contributors to early demand.
* The elements of the recovery plan may include, amongst others:
* Analysis of the scenarios, treats, short-term, medium-term, and long-term effects of COVID-19 on the tourism industry in South Africa. The United Nations World Tourism Organisation (UNWTO) has put forward three global recovery scenarios based on possible dates for gradual opening of international borders.
* Scenario 1 (-58%) based on the gradual opening of international borders and easing of travel restrictions in early July 2020.
* Scenario 2 (-70%) based on the gradual opening of international borders and easing of travel restrictions in early September 2020.
* Scenario 3 (-78%) based on the gradual opening of international borders and easing of travel restrictions in early December 2020.

Notably, South Africa falls out of these three scenarios and will therefore be severely affected by the continued closure of international tourism. The Entity should lobby the government for the early opening of both domestic and international tourism. The Entity should work closely with the industry to come up with South African scenarios that will cushion the sector from total collapse. The Committee should note that the Entity together with the Tourism Business of South Africa have embarked on a mission to lobby the government to demonstrate that travel and tourism does not have to wait until December to reopen, but this can be done much earlier (e.g., Level 3). The Entity should apprise the Committee on the various protocols developed to facilitate the opening of the sector during Level 3.* Analysis of the travel patterns after COVID-19 and possible target marketing responses, given the possibility that aviation and international travel may remain banned in the foreseeable future.
* Business events recovery strategy,
* Clear collaboration activities between the government and the private sector,
* Domestic tourism interventions,
* Rejuvenating core international markets,
* Communication strategy with the South African source markets to instill confidence about destination South Africa;
* Industry, specific interventions to create sustainability and resilience, including saving tourism jobs.

**Proposed tourism industry standards protocols for COVID-19 operations**The Tourism Business Council of South Africa has developed the COVOD-19 tourism protocols to guide opening of the tourism sector. These protocols have not been adopted by the government as yet, and are provided here for information purposes of engaging with South African Tourism on their merits and demerits. Some industry players have claimed that these protocols are too complicated and should be simplified to prevent unintended consequences. The proposed protocols are as follows:(i) Persons with higher risk* Persons above 65 years of age may be asked not travel to visit hotels, lodges and B&Bs.
* Persons between 60 to 65 are recommended not to travel and visit hotels, lodges and B&Bs.
* Persons with high-risk health issues are recommended not travel and visit hotels, lodges and B&Bs
* Self-catering establishments can operate for high risk categories of guests travelling by private car or hire car.
* High-risk staff will be allocated to smaller shifts, lower risk areas, be given additional PPE e.g., visors and will work from home where this is possible.

(ii) Public transport and staff* Establishments will facilitate staff living-in on-site as far as possible
* Establishments where staff cannot live in, private transport use for staff is encouraged.
* All establishments will reduce as far as possible staff use public transport.

(iii) Travel between provinces* To travel from home to and from an accommodation establishment – proof of booking must be carried, plus it is recommended that directions or a map of the route also be carried.
* Customers only stop to purchase fuel or other items at a petrol station or permitted retail operation en-route.
* Only people visiting accommodation establishments in private vehicles or car hire vehicles may cross provincial borders.
1. Contact tracing
* All operating businesses will obtain and keep guest/visitor/passenger/client details plus recent and planned travel information
* Staff contact details will be up-to-date and all details of staff on all shifts, drivers of vehicles etc., will be meticulously recorded.
1. Protocol commitment
* All owners, directors and/or managers of businesses, premises or transport services will sign a pledge to adhere to industry protocols
* The TBCSA and sector leaders will provide support and guidance to smaller establishments to implement the standard industry protocols 6. Health and Safety Officer Operating businesses and premises will be required to appoint a COVID-19 Health and Safety Officer. Depending on the size of the business this can either be a designated individual taking on the role in addition to their current duties or an owner or manager. Larger businesses may be required to employ a dedicated officer.
1. Medical and Travel declaration
* All patrons of businesses in the tourism industry will be required to provide a complete Medical and Travel declaration. This must be provided on arrival, boarding or check-in, depending on the circumstance. The temperatures of all patrons will be taken on arrival and daily in the case of accommodation establishments.
1. Training
* All staff will be required to receive training for properly adhering and administering the various requirements of the new travel protocols

**Rethinking Tourism Strategy*** In the previous Annual Performance Plan the Entity had planned to grow domestic holiday trips to 8.3 million in the next 5 years. This target has been removed in the revised Annual Performance Plan.
* The indications are that the recovery will be driven by domestic tourism.
* This puts a sharp focus on the need to revise South Africa’s tourism strategies to focus more on domestic tourism instead of international tourism.
* This will be a bold move as the focus for South African Tourism has always been on international inbound tourism.
* Increasing the domestic holiday trips imply that the Entity should develop a dedicated Domestic Tourism Growth Strategy.
* There also needs to be a sharp focus on intra-African tourism, with a new focus on increasing the share of the African markets.

**Creating Demand vs Market-Driven Marketing*** Demand-driven marketing is an established and acceptable norm in the marketing fraternity, however, South African Tourism needs to be innovative and “think outside the box” to **create demand** for South African products.
* Creating demand will deviate from the current trend of the tourism growth trajectory that is concentrated in the ‘Cape Town-Durban-Gauteng Triangle’ and focus on put focus on the products in Villages, Townships, Small Towns an Dorpies (VTSDs).
* South African Tourism should focus on VTSDs with regard to business tourism in the MTSF. However, this is not enough and marketing should extend to all kinds of products in these previously neglected areas.
* Creating demand may also be linked to the government’s District Development Model where South African Tourism can work with the local government to package specific tailor-made experiences for certain off the beaten track municipalities and VTSDs.

**Destination Brand*** Before COVID-19, the brand reputation for South Africa had already suffered due to perceptions caused by negative crime reports, xenophobic attacks on foreign nationals, tourist animal interactions, canned hunting, government policy of expropriation of land without compensation, and related brand killers and disablers.
* In mitigating this, South African Tourism is planning to have the destination brand of South Africa as a country separated from the corporate brand of South African Tourism as an organisation.
* This relates directly to the issues raised by the Committee in the meeting with Brand South Africa in terms of the custodianship of the South African Brand and the duplication of the brand management mandate.
* South African Tourism should provide a clear evidence that the separation of the country brand from the corporate brand will achieve the desired outcomes in entrenching South Africa as a destination of choice in foreign markets.
* The Minister should also provide clarity and update eon the government undertaking to consolidate state entities and how this will impact the work of South African tourism and Brand South Africa as the county’s marketing entities.

**Marketing Investment Framework*** The new market portfolio of South African Tourism in the MTSF will include 14 Growth Markets; 14 Defend markets, and 15 Developing markets.
* The Committee should get a clear explanation on how these markets were selected and how have they been affected by the COVID-19 pandemic.
* The Committee should be given an understanding on the investments in Rand Value in each of these markets and the expected Return on Investment (ROI) from each market.
* The Entity has not provided the breakdown of the domestic market portfolio and how it has been segmented.
* The Entity should provide the domestic market segments, financial investment in each segment, and the expected ROI in each domestic market segment.

**Joint Marketing Agreements*** The Joint Marketing Agreements (JMAs) are useful in driving volumes from the identified markets in the marketing investment.
* The Auditor-General (AG) made some findings with regard to meeting deliverables, which led to South African Tourism putting a moratorium on JMAs.
* The Entity should indicate how are they going to achieve the projected numbers from each identified market segment if there is still a moratorium on the JMAs.
* The Entity should also provide feedback on the progress made in resolving the matters identified in the implementation of JMAs by the AG.

**Supercharge 5-in-5*** Based on the recommendations of the Committee, the entity revised its “5-in-5 marketing strategy” to the “Supercharge 5-in-5” when it struggled with meeting the projected targets for 2021.
* The 5-in-5 strategy was meant to bring additional 5 million tourists to South Africa by 2021, comprising 4 million international tourists and 1 million domestic tourists.
* The Entity should provide an update on the achievement of targets in the Supercharge 5-in-5.
* Notably, there is no new comprehensive marketing strategy for the current MTSF such as the 5-in-5 strategy.
* The Entity should indicate how they will consolidate their marketing efforts towards achieving the 21 million additional tourists by 2030.

**Commercialisation of South African Tourism Services*** The tabled five-year Strategic Plan refers to new income streams and possible commercialisation of certain services that will be identified to ensure adequate financial resources are available.
* As a public entity listed in Schedule 3A of the Public Finance Management Act to fulfil a specific mandate, it is not clear how will the commercialisation of services affect the domestic and international marketing mandate, and the exposure for tourism products in South Africa, especially the SMMEs.
* The income streams to be commercialised should be clearly spelt out, the investment of public funds be specified, and the ROI be quantified.
* This should be based on the thorough cost-benefit-analysis of commercialisation.
* The Entity should indicate whether it has the internal capacity to embark on the commercialisation project or this function will be outsourced to external service providers.
* The Entity should also provide all the necessary approvals by the National Treasury to embark on the commercialisation process.

**Priority Markets*** The Entity has indicated that it will be paying special focus on the three priority markets, namely, Nigeria, China and India.
* In the past, the Committee had urged the Entity to develop a specific China marketing strategy, but this was rejected, citing China as one of the markets identified in the Marketing Investment Framework without a need for specific interventions.
* Prioritisation of Nigeria, China and India shows a change in the approach and considers what the Committee previously identified as important growth markets to be prioritised.
* The Entity should provide specific details of the marketing strategies to be implemented in each of these priority markets.
* The Entity should quantify the investment to be made in each of the priority markets and the expected return on investment.
* The Entity should also provide an update on the return on investment of the investment made in the Nordic markets, as this may provide a good case study for the three new identified priority markets.

**The Digital Operating Model*** The Entity has indicated that it will be moving to the digital operating model.
* This will be based on the “5 R’s” namely, right people, in right place, doing right things with the right processes at the right time.
* In the previous MTSF the Entity implemented an organisational restructuring.
* This was based on the Committee recommendations, and was meant to “put the right people in right positions”.
* The Entity should indicate how the Digital Operating Model will enhance the business of South African Tourism.

**Outsourcing of Services*** The Committee should acknowledge that the mandate of SA Tourism requires the Entity to use consultants to fulfil some of its obligations.
* This implies that some of the allocated budget goes towards consultant fees.
* The consultant fees include items such as retainer fees for above and below the line marketing advertising agencies, PR agencies, exhibition management services, market research, marketing development, research and campaigns.
* The Entity should indicate how much of its allocated budget will go towards paying consultant fees in the current MTEF.
* The Entity should indicate how it has made progress in creating internal capacity for some of the outsourced activities.
* The Entity should also indicate how the Digital Operating Model will reduce reliance on consultants in some of the currently outsourced work.

**Destination Quality Assurance*** Destination Quality Assurance remains a challenge in South Africa.
* The plans tabled by the Tourism Grading Council of South Africa (TGCSA) do not have major deviations from the plans and strategies implemented in the past.
* In addition to the Grading Core Requirements and Grading Standards, the TGCSA has launched a recognition mechanism to recognise niche market services and facilities.
* These are called Accolades and include 17categories, such as wedding venues, cycling tourism, birding, family friends and others.
* The TGCSA should provide concrete plans on how the VTSDs will be integrated in the grading scheme.
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| **Strategic Advice**The Committee should encourage the Department to:* Expedite the development of the National Tourism Recovery Strategy (NTRS) to ignite the tourism sector post COVID-19.
* Develop various tourism recovery scenarios for South Africa fashioned around the United Nations World Tourism Organisation three scenarios.
* Develop a comprehensive collaboration and partnerships plan between South African Tourism, Provincial Destination Management Organisations, and municipalities.
* Quantify the marketing budget available across all the spheres of government and maximise optimal marketing across markets and platforms.
* Develop a comprehensive domestic growth strategy that covers various domestic market segments, and takes into consideration the Villages, Townships, Small Towns and Dorpies.
* Develop a comprehensive collaboration strategy between the private sector and South African tourism in funding targeted marketing activities in both international and domestic tourism space.
* Target international and African markets that bring both volume and value.
* Focus on the higher spending international tourism markets to South Africa in order to drive Total Direct Foreign Tourism spend to increase the contribution of the sector to the county’s Gross Domestic Product.
* Identify and focus on the new high-growth markets in Africa, China and India. This entails the development of the focussed strategy for these high growth markets.
* Infuse deliberate inclusive growth in the plans of South African Tourism to deal decisively with transformation in the sector.
* Improve internal controls and governance of the organisation.
* Work with the provinces, cities, and towns to improve the tourism airlift in the country and for international routes.
* Integrate technology in destination South Africa to improve the tourist experience and competitive advantage.
* Work with provincial Destination Management Organisations to capacitate municipal officials to bridge the tourism marketing and business tourism knowledge gap.
* Work with the private sector to stimulate the South African Incentives market.
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| **Policy Advise**The Committee should urge the Minister to ensure that the Board of South African Tourism:* Effects the amendment to the grading scheme in the Tourism Amendment Bill to make it free but compulsory.
* The TOMSA levy is changed from being a voluntary scheme to become a compulsory collection.
* South African Tourism works closely with the private sector to look at reducing prices for domestic packages and explore the dual pricing policy to stimulate domestic tourism.
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| **POSSIBLE QUESTIONS*** With regard to the revised Annual Performance Plan for 2020/21, what are the relevant details in terms of:
1. Projects removed per Programme.

(b) Projects added per Programme.(c) Quantification of budget savings per Programme.(d) Implications of removed projects on the mandate of South African Tourism.(e) How will the saved budget be re-allocated/ used?* How has the COVID-19 Risk Adjusted Framework impacted on the tourism industry in South Africa?
* How is the implementation of the Tourism Relief Fund progressing and what was the impact of the court cases on implementation?
* What organisational activities have either been removed and / or added in the revised Annual Performance Plan?
* How has the COVID-19 impacted on organisational revenues?
* What is the current update on the development of the National Tourism Recovery Strategy, and how is the collaboration with the industry in that regard?
* How has the industry responded to the proposed tourism industry protocols that have been developed by the Tourism Business Council of South Africa to lobby for opening the tourism industry at Level 3?
* What will South African Tourism do to promote and ignite domestic tourism given that most studies internationally point to this segment of tourism as the future of the sector post COVID-19?
* What will be the new and emerging trends of international and domestic tourism post COVID-19 in relation to travel, choice of tourism activities, and choice of tourism facilities?
* How did South African Tourism identify the countries included in the Market Investment Framework?
* With a new focus on domestic tourism, what are the market segments that will be targeted?
* With regard to stakeholder engagements, what formal institutional arrangements are envisaged to maximise collaborations and coordination?
* What factors will be considered by South African Tourism when reviewing the Market Investment Framework as affected by COVID-19?
* Is South African Tourism confident that the targets or planned outcomes tabled in the five-year strategic plan and the 2020/21 Annual Performance Plans are SMART given the changes in the delivery environment such as COVID019 and downgrading of the sovereign economy by the rating agencies?
* How is South African Tourism going to use the products in the VTSDS to deal with seasonality and geographic spread?
* What is the new focussed marketing strategy for South African Tourism replacing the 5-in-5 in the new MTSF?
* What has the Entity done differently in the new strategic plan to ensure that the attainment of the predetermined objectives?
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