



SOUTH AFRICAN TOURISM

END OF TERM REPORT

(1 April 2020 to 31 March 2025)

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EXECUTIVE AUTHORITY STATEMENT

It is my honour to present this End of Term Report for South African Tourism for the period 2020 to 2025 - a period that tested our resolve as a nation, demanded agility from our institutions, and reinforced the critical role of tourism in our economic and social recovery. This report reflects not only the operational performance of South African Tourism, but the story of a sector that continues to embody the resilience, diversity, and potential of South Africa.

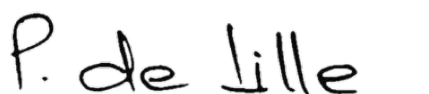
When this current strategic cycle began, we did so with confidence in tourism's ability to drive inclusive economic growth, create meaningful jobs, and build bridges across our society. Just months later, the world was plunged into a pandemic that reshaped mobility, investment, and consumer confidence. The recovery that followed was uneven and uncertain, shaped by fiscal constraints, geopolitical headwinds, and persistent challenges in infrastructure, air access, and destination competitiveness. Yet throughout this period, the tourism sector, and South African Tourism in particular, remained steadfast in its efforts to stimulate demand, restore trust, and activate tourism growth.

This review provides clear evidence of South African Tourism's contributions to national recovery. It highlights the impact of its global campaigns, the visibility gained through hosted platforms such as Africa's Travel Indaba and Meetings Africa, the revitalisation of domestic travel through the Sho't Left brand, and the Village, Township and Small Dorpies business events campaigns. It also reflects the maturing of tourism intelligence systems, stakeholder engagement practices, and transformation-focused delivery.

Importantly, these efforts were not pursued in isolation. They were fully aligned with the objectives of the National Development Plan, the Economic Reconstruction and Recovery Plan, the Tourism Sector Recovery Plan, and the Tourism Sector Masterplan. They supported the priorities set out in the Medium-Term Strategic Framework, including economic transformation, job creation, social cohesion, and spatial inclusion. They were grounded in the recognition that tourism must be a national asset - not only for visitors, but for the millions of South Africans whose livelihoods depend on its success.

As we look ahead to the 7th Administration, we must continue to build on these foundations. This means driving greater impact through our marketing investments, advancing transformation across the sector, and deepening partnerships with provinces, cities, communities, and the private sector. It also requires a renewed focus on policy enablement - including visas, airlift, safety, infrastructure, and investment - to unlock the full potential of this vital industry.

I wish to acknowledge the leadership of the Board, the commitment of the executives and staff of South African Tourism, and the many partners who contributed to the delivery and credibility of this review. Their efforts have ensured that this report is not merely a record of the past, but a roadmap for the future.



Honourable Patricia de Lille, MPL
Minister for Tourism

ACCOUNTING AUTHORITY STATEMENT

On behalf of the Board of South African Tourism, I am pleased to present this End of Term Report for the period 2020 to 2025. This report provides a detailed account of the organisation's strategic delivery, institutional performance, and evolving governance landscape over a period marked by profound disruption and transformation in the tourism sector.

The Board's oversight responsibilities were exercised in one of the most challenging periods in the history of South African tourism. The initial years of the strategic cycle were shaped by the global health crisis, an unprecedented collapse in travel demand, and the need to repurpose strategic priorities in real time. In the years that followed, recovery remained uncertain, and the organisation was required to navigate fiscal constraints, policy shifts, and stakeholder expectations while driving delivery with integrity.

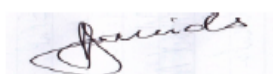
Throughout this period, the Board worked closely with the executive team to ensure that the strategic intent approved in 2020 remained relevant, responsive, and implementable. The organisation demonstrated agility in rebalancing its portfolio to support domestic demand, safeguard its international market presence, and enhance regional platforms. It also strengthened its internal systems, particularly in relation to performance information, digital infrastructure, stakeholder engagement, and data-driven planning. As this report confirms, South African Tourism played a visible, credible, and catalytic role in reactivating demand and sustaining sector visibility - despite operating within a volatile and complex environment.

The Board also paid careful attention to corporate governance. Over the five-year period, despite setbacks, oversight structures were strengthened, internal control measures were reviewed, and risk management systems were introduced. While audit findings and institutional transitions presented real challenges, there was also clear progress in restoring stability, improving transparency, and building confidence in the organisation's ability to deliver against its mandate.

Importantly, this End of Term Report reflects the contributions of multiple stakeholders. It is the product of input from leadership, staff, stakeholders, and independent evaluators. It draws on the full body of evidence produced through strategic planning, monitoring, evaluation, reporting and stakeholder consultation. It demonstrates a maturing institution that remains committed to developmental impact, to governance excellence, and to contributing meaningfully to South Africa's economic and social progress.

As the country enters the next strategic period, the Board reaffirms its commitment to effective oversight, strategic guidance, and stakeholder accountability. We recognise that tourism is both an economic engine and a public good, and that the trust placed in South African Tourism must be honoured through professionalism, performance, and partnership.

I thank my fellow Board Members, the leadership team, and all staff of South African Tourism for their contribution to this five-year journey.



Professor Gregory Davids
Chairperson
South African Tourism Board

ACCOUNTING OFFICER STATEMENT

It is with humility and pride that we present this End of Term Report for the period 2020 to 2025, on behalf of the management and staff of South African Tourism. This report reflects the work of an organisation that has remained resolute in the face of numerous challenges, and is committed to its mandate of positioning South Africa as a compelling, inclusive, and competitive tourism destination.

The five-year period under review was unlike any in the democratic era. It began with unprecedented uncertainty, as the global pandemic forced the collapse of visitor flows, supply chains, and revenue lifelines across the sector. As an organisation we had to pivot rapidly, to protect brand equity, recalibrate platforms, support partners, and contribute meaningfully to national recovery efforts.

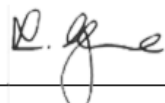
What followed was a period of rebuilding, adaptation, and renewal. We launched targeted global campaigns to re-enter strategic markets, strengthened our domestic platform through revitalised Sho't Left initiatives, and evolved our hosted platforms to restore South Africa's visibility in business and leisure segments alike. We modernised how we plan, monitor, and evaluate performance. We integrated data systems to support intelligence-led decision-making, and introduced more inclusive approaches to marketing and fulfilment. We also deepened our engagement with stakeholders across the public and private sectors, recognising that collaboration remains the foundation of sustainable tourism growth.

This report demonstrates not only what we delivered, but how we learned. We improved our use of evidence, sharpened our targeting, and built greater agility into our operations. From our investment in structured visitor feedback mechanisms to the expansion of village, township and small dorpiess travel campaigns, we prioritised interventions that were grounded in insight and aligned with the national imperative for inclusive growth. We also reflected on where we fell short - including areas such as geographic spread and internal governance - and commit to building the institutional strength needed to close those gaps.

The preparation of this report was itself an organisational milestone. It demanded rigorous self-reflection, multi-year evidence tracking, and the synthesis of over one hundred data sources. I am confident that it presents an honest, complete, and forward-looking account of our journey - and one that will serve both as a performance record and a learning resource.

I would like to express my sincere gratitude to our dedicated teams, past and present, whose work underpins every insight contained in this report. I also thank our Minister and Board for their leadership and stewardship, and our partners across government and industry for walking this journey with us.

We now look ahead to the 7th Administration with clarity, focus, and renewed energy - determined to position tourism not only as a driver of economic recovery, but as a contributor to national transformation, social cohesion, and shared prosperity.



Ms. Nombulelo Guliwe
Chief Executive Officer

INTRODUCTION - PURPOSE, CONTEXT, AND STRUCTURE OF THE REPORT

The End of Term Report for South African Tourism (SA Tourism) for the 2020 - 2025 planning cycle is a strategic, evidence-based assessment of organisational performance and sector contribution. It is prepared in alignment with the 2022 Guidelines for Reporting on the 2020 - 2025 Strategic Plans issued by the Department of Planning, Monitoring and Evaluation (DPME) and forms part of the government-wide planning, monitoring, and evaluation system.

The purpose of this report is not only to assess what was achieved but to understand how performance evolved under exceptional and shifting conditions, and to draw forward lessons that support organisational alignment to the national agenda under the seventh administration.

A Disrupted but Defining Five-Year Period

SA Tourism entered the sixth administration with a bold five-year strategic plan aimed at demand-led growth, brand repositioning, inclusive participation, and global competitiveness. That ambition was tested almost immediately. The corona-virus (COVID-19) pandemic triggered an unprecedented global shutdown, effectively halting travel and erasing progress across key tourism markets. In its wake, SA Tourism was forced to recalibrate its strategy, redesign delivery, and recommit to sector resilience.

The five Annual Performance Plans (APPs), from financial year (FY) 2020/21 to FY2024/25, which operationalised the Five-Year Strategic Plan 2020 - 2025 became both performance blueprints and crisis management tools. Annual amendments to the Five-Year Strategic Plan 2020 - 2025, outlined in Annexure A of each of the five APPs, reflect how the organisation adjusted its outcome level indicators, targets, and assumptions in response to pandemic shocks, fiscal constraints, and evolving policy priorities. These include responding to the Economic Reconstruction and Recovery Plan (ERRP), the Tourism Sector Recovery Plan (TSRP), and the later Tourism Sector Masterplan (TSMP). The result was a dynamic five-year strategy marked by both disruption and adaptation.

Purpose and Timing of the Review

While the Five-Year Strategic Plan 2025 - 2030 and the FY2025/26 APP were tabled on 4th April 2025, this review plays a critical role in strengthening organisational learning, performance accountability, and alignment with emerging national priorities. This includes sustainability, localisation, and brand equity as cross-cutting enablers of inclusive growth and recovery, as highlighted in SA Tourism's FY2024/25 sustainability reviews and brand repositioning strategies. Additionally, some of the learnings and recommendations outlined in this report have already been expressed in the new plans for the 7th Administration.

The End of Term Report is timed to inform the:

- 1) FY2025/26 Budget Adjustment process (August to October 2025); and
- 2) Annual planning cycle to develop the FY2026/27 APP.

This review ensures that lessons, evidence, and insights from the past five years actively inform the next strategic planning window, and thus has four core purposes, namely to:

- 1) Reflect on what was planned, what was achieved, and what was learned over the 2020 - 2025 cycle.
- 2) Assess alignment with SA Tourism's mandate, policy priorities, and transformation agenda.
- 3) Analyse patterns of organisational delivery, strategic adaptation, and stakeholder responsiveness.

- 4) Provide credible, independent insight to support future planning, budgeting, governance, and oversight.

The End of Term Report, as a compliance report, is significant in that it is a performance synthesis drawing together audited results, evaluation evidence, stakeholder views, and context analysis to tell the story of SA Tourism's organisational and sectoral contribution during a time of profound transition.

Methodology and Assurance Approach

In crafting this report, the review draws on:

- 1) Audited performance data for the first four financial years (FY2020/21 to FY2023/24).
- 2) Pre-audited FY2024/25 performance data validated through SA Tourism's Internal Audit function.
- 3) A verified evidence base of source documents (reflected in Annexure 2), including:
 - a) Strategic documents: The Five-Year Strategic Plan 2020 - 2025, all five APPs, accompanying Annexure A amendments, and the SA Tourism Corporate Strategy (2025 - 2040), the Integrated Tourism Brand Strategy (2024), Product Proposition Sustainability Survey (2024), and Sustainable Stories Campaign reports (2023 – 2024).
 - b) Organisational reviews: The 2022 Mid-Term Report (MTR), annual strategic review processes, and the Annual Reports (ARs).
 - c) Performance and evaluation sources: Sector-specific statistics and performance reports, implementation programme evaluations, economic impact assessments, business and leisure brand equity studies, tourism trend analysis reports, international trade show debriefs, and tourism key performance indicator dashboards.
 - d) External stakeholder feedback: Corporate Reputation Index reports.
 - e) Internal stakeholder feedback: Staff Engagement Survey reports.
 - f) Internal control and governance: Auditor-General of South Africa (AGSA) outcomes reflected in the audit reports issued by the AGSA, as well as audits and assessments of the internal control environment reflected in Internal Audit reports.
 - g) Benchmarking and global context sources: International tourism barometers and economic impact reports from United Nations World Tourism Organisation (UNWTO) and World Travel and Tourism Council (WTTC).

The methodology deployed to draft the report combined indicator tracking, trend analysis, and thematic synthesis. A Steering Committee representing all business units reviewed findings, validated insights, and guided refinement of this report. The Executive Committee (ExCo) reviewed and further enhanced the report.

Dual Component Design

The process of developing the End of Term Report comprised of two complementary components:

- 1) The End of Term Report as a user-oriented strategic storyline designed for the Executive Authority, Accounting Authority, oversight bodies, and stakeholders. It presents strategic reflections, performance insights, and organisational learning in an accessible narrative form.

- 2) An internal technical document which is a comprehensive evidence base that includes indicator-level tracking, evaluation findings, source registers, and performance analysis tables.

Together, these components ensure transparency, usability, and forward alignment, serving both compliance and strategic insight purposes.

Structure of the End of Term Report

The report is structured as follows:

- **Part A** defines SA Tourism's constitutional, legislative, and policy mandate, and how this shaped organisational delivery.
- **Part B** outlines SA Tourism's strategic vision, mission, and five-year Theory of Change, and assesses their relevance and influence.
- **Part C** analyses the operating environment from 2020 to 2025 (globally, nationally, and organisationally) and reflects on how SA Tourism adapted.
- **Part D** synthesises impact evidence, outcome achievements, performance results, and lessons from implementation programme evaluations and stakeholder feedback.
- **Part E** presents the cross-cutting organisational lessons learnt and recommendations for the next strategic planning cycle.

This End of Term Report affirms SA Tourism's commitment to accountability, performance learning, and transformation. It provides a clear, evidence-based narrative that supports future planning, policy alignment, and organisational renewal - positioning SA Tourism to enter the new strategic cycle with purpose, direction, and insight. In support of the End of Term Report, a technical document is available which provides the full performance evidence base, evaluation analysis, indicator datasets, and assurance methodology.

PART A: OUR MANDATE

SA Tourism is a national public entity mandated to position South Africa as a preferred leisure and business events destination. This mandate is rooted in the Constitution of the Republic of South Africa, enacted through enabling legislation, directed by national policy, and institutionalised through strategy and annual planning.

This section outlines the full spectrum of SA Tourism's formal mandate during the 2020 - 2025 strategic period. It tracks how that mandate was interpreted, adapted and operationalised over the five years, both as a stable foundation and as a site of evolving organisational focus.

The narrative is structured across three levels:

- 1) Constitutional and legislative mandates, as the legal and ethical foundation for all operations.
- 2) Policy mandates, which define the strategic intent and priorities of the state.
- 3) Organisational strategies and planning frameworks, which convert these imperatives into measurable outcomes.

Together, these mandates provide the basis against which performance in later sections is assessed.

1. CONSTITUTIONAL AND LEGISLATIVE MANDATES

SA Tourism's apex mandate flows from **the Constitution of the Republic of South Africa, 1996**, which establishes the rights, principles, and obligations that all public organisations must uphold. Four provisions are especially relevant:

- 1) Section 22 affirms the right to choose trade, occupation, and profession freely. SA Tourism's mandate to grow the tourism economy directly supports this right by enabling enterprise development, job creation, and youth participation in the sector.
- 2) Section 24(b) guarantees the right to an environment that is not harmful to health or well-being and requires sustainable use of natural resources. This informs SA Tourism's responsible tourism approach and sustainability messaging, which intensified after COVID-19 and was further operationalised through the sustainability approach and storytelling initiatives.
- 3) Section 195(1) outlines basic values and principles governing public administration, including transparency, equity, accountability, efficiency, and responsiveness. These values underpin SA Tourism's planning, governance, and reporting systems, and are increasingly reflected in its digital transformation, audit improvement efforts, and stakeholder engagement processes.
- 4) Schedule 4, Part A, identifies tourism as a concurrent national and provincial function. This gives effect to SA Tourism's intergovernmental mandate and justifies its leadership in marketing campaigns that are executed in partnership with provinces and stakeholders.

SA Tourism's legislative mandate is grounded in the **Tourism Act No. 3 of 2014**, which formally establishes the organisation as a national public entity under the oversight of the Minister of Tourism. The act defines the statutory functions of the South African Tourism Board (the Board), and mandates its role in marketing, quality assurance, and sector development.

In terms of Chapter 3 of the act, the Board is tasked with:

- 1) Marketing South Africa as a destination for both domestic and international tourists.
- 2) Promoting South African tourism products and facilities across markets.
- 3) Developing and implementing a marketing strategy aligned with the objectives of the act and the National Tourism Sector Strategy.
- 4) Advising the Minister on matters related to tourism marketing.
- 5) Establishing, with Ministerial approval, the South African National Convention Bureau (SANCB), to promote South Africa as a destination for business events by coordinating bids for international conventions and liaising with relevant public and private bodies to advance business events tourism.

The act also confers an additional responsibility through Chapter 4, in which the Minister delegates to the Board the function of managing the Tourism Grading Council of South Africa (TGCSA). In terms of Section 28, this includes implementing and managing the national grading system for tourism, as a regulated framework for assessing tourism products and services.

These core responsibilities were consistently reflected in the Five-Year Strategic Plan and APPs and remained stable across all five years. However, their operational interpretation evolved - particularly in response to the COVID-19 pandemic - with increased emphasis on domestic market recovery, regional integration, digital campaigns, and equity-focused initiatives.

In addition to the Tourism Act and other explicitly cited instruments, such as the **Public Finance Management Act No. 1 of 1999 (PFMA)** and the **Broad-Based Black Economic Empowerment (B-BBEE) Act No. 53 of 2003**, SA Tourism also operated within a wider compliance environment shaped by public sector legislation related to procurement, employment equity, ethics, data protection, and governance. This includes the **Employment Equity Act, 1998, as amended in 2023**, which introduced new demographic targets and triggered alignment processes across SA Tourism's human capital (HC) and procurement systems.

While not always listed in the Five-Year Strategic Plan or APPs, these instruments – including various governance, organisational compliance, anti-corruption, audit, and procurement laws – materially influenced internal policy, audit findings, and programme delivery across the five-year term.

These legislative instruments collectively shaped SA Tourism's performance and compliance landscape. While only some were explicitly cited in the Five-Year Strategic Plan and APPs, all were operationalised across internal policies, strategic reviews, and audit frameworks. This broader legislative compliance universe provides critical context for the assessments in parts D and E of this report.

2. POLICY MANDATES

SA Tourism's strategic orientation over the 2020 - 2025 period was shaped by a hierarchy of national policy frameworks, each reinforcing its mandate to drive inclusive sector growth, organisational accountability, and global competitiveness. These frameworks were not only referenced in the Five-Year Strategic Plan and five APPs, but actively informed programme design, stakeholder partnerships, and organisational repositioning efforts throughout the five-year term.

The National Development Plan, Vision 2030

The apex policy mandate remains the National Development Plan (NDP), Vision 2030, which identifies tourism as a catalytic sector for job creation, rural development, youth employment, and economic transformation. SA Tourism consistently positioned its work within this national vision, using the NDP to anchor its inclusive growth objectives, transformation imperatives, and stakeholder alignment strategies.

The NDP's emphasis on leveraging natural, cultural, and heritage assets, while promoting responsible and sustainable tourism, directly informed SA Tourism's domestic campaign narratives, visitor experience frameworks, and support for villages, townships, and small dorpias (VTSD) destinations. This alignment was especially visible in the post-COVID-19 recovery phase, where strategic shifts to local market stimulation and product diversification reinforced the NDP's priorities.

Medium-Term Strategic Framework 2019 - 2024

The Medium-Term Strategic Framework (MTSF) 2019 - 2024 translated the NDP's long-term vision into government's five-year implementation programme. SA Tourism aligned its institutional outcomes and indicators with the following three national priorities:

- 1) Priority 1: A Capable, Ethical and Developmental State, which underpinned commitments to governance reform, performance integrity, and organisational credibility.
- 2) Priority 2: Economic Transformation and Job Creation, which guided SA Tourism's focus on sector equity, inclusive marketing, and regional tourism activation.
- 3) Priority 7: A Better Africa and World, which informed regional integration, cross-border partnerships, and global brand positioning.

These priorities structured the Five-Year Strategic Plan, informed each year's Annexure A amendments outlined in the APPs, and were validated through the 2022 Mid-Term Report. In the post-pandemic years, the organisation's alignment with Priority 1 gained additional significance due to audit concerns, risk management needs, and transformation targets. Priority 7 also grew in strategic relevance, especially as SA Tourism scaled up business events, cross-border campaigns, and whole-of-state tourism coordination mechanisms.

Economic Reconstruction and Recovery Plan

The ERRP, launched in 2020 as a Presidential programme to stimulate the recovery of the South African economy in the wake of COVID-19, identified tourism as one of eight priority sectors for immediate intervention and stimulus. SA Tourism's contribution to the ERRP was explicitly referenced in all five APPs from FY2020/21 onward. The organisation used the ERRP to reframe its value proposition in the national recovery agenda, aligning interventions to key ERRP pillars, including:

- 1) Stimulating domestic demand through targeted brand campaigns and affordable product messaging.
- 2) Preserving sector capacity and supporting small, medium, and micro enterprises (SMME), particularly those led by women, youth, and township-based entrepreneurs.
- 3) Enhancing the quality of the visitor experience, prioritising safety, and confidence.
- 4) Enabling policy and regulatory reforms, including support for the development and implementation of the TSRP.

The ERRP provided the critical national policy umbrella under which the TSRP was developed, and it significantly influenced SA Tourism's post-2020 repositioning approach.

Sector-Specific and Supporting Policy Frameworks

SA Tourism's strategic choices and organisational design were further shaped by a series of sector-specific and supporting national policy instruments, including:

- 1) The **White Paper on the Development and Promotion of Tourism 1996**, which remained the foundational policy instrument guiding cooperative governance and public-private collaboration, especially in support of the District Development Model (DDM) and intergovernmental marketing platforms. The White Paper on the Development and Promotion of Tourism 2024 was gazetted on 4th October 2024 and provides a framework and guidelines for tourism development and promotion in South Africa.
- 2) The **National Tourism Sector Strategy (NTSS) 2016 - 2026**, which provided the long-term vision for "a rapidly and inclusively growing tourism economy", and informed segmentation logic, destination branding, product support, and service quality improvement.
- 3) The **Tourism Sector Recovery Plan 2021**, developed under the ERRP, which shaped SA Tourism's programme interventions from 2021 to 2023. The TSRP prioritised demand stimulation, supply-side support, and enabling policy reforms - directly reflected in domestic and business events recovery efforts.
- 4) The **Tourism Sector Masterplan 2023**, tabled by the Department of Tourism, recalibrated organisational focus areas including digital modernisation, transformation, and regional integration. It is explicitly cited in the FY2024/25 APP as a forward-looking framework for the next strategic cycle.
- 5) The **Tourism Black Economic Empowerment Charter (BEE Charter)**, which informed

transformation goals, inclusive procurement practices, and supplier development - all of which became embedded in performance indicators and programme targets.

- 6) The **TGCSA Grading Criteria**, which provided a national quality assurance system and was integrated into both domestic positioning and sectoral product support strategies. The criteria were frequently referenced in APPs and visitor experience efforts.

Together, these frameworks constituted a comprehensive and dynamic policy mandate that shaped SA Tourism's evolution over the five-year period. These were more than static reference points but living instruments of organisational planning, stakeholder engagement, and programme refinement. Their combined influence is assessed throughout this report, particularly in Parts B (Strategic Focus), C (Operating Environment), and D (Performance Assessment).

3. ORGANISATIONAL POLICIES AND STRATEGIES INFORMING PLANNING OVER THE FIVE YEARS

While SA Tourism's legislative and policy mandates provided the overarching framework for its operations, organisational planning over the five-year period was equally shaped by a dynamic and evolving set of internal strategies, implementation protocols, and performance frameworks. These internal instruments translated high-level policy intent into operational plans, guided programme design, and enabled organisational responsiveness across changing contexts.

A number of strategic instruments were explicitly referenced in the Strategic Plan and APPs, anchoring the organisation's approach to market development, brand and campaign integration, transformation, and reputational management:

- 1) The **Market Prioritisation and Investment Framework (MPIF)**, revised in 2020 using 2019 baseline data, remained the cornerstone of SA Tourism's market segmentation model. It guided investment across 24 strategic markets, supporting return-on-investment logic, performance targeting, and resource allocation across domestic, regional, and global portfolios. It was consistently cited throughout the review period. The MPIF was reviewed in 2024.
- 2) The **Whole-of-State Approach to Tourism**, introduced in the FY2024/25 APP, formalised intergovernmental coordination and alignment with the Department of Tourism, provinces, and sector partners. It addressed organisational calls for unified messaging, collaborative planning, and improved policy coherence.
- 3) The **Global Trade Strategy (2024)** expanded SA Tourism's focus on trade-facing platforms, positioning South Africa more competitively in global tourism circuits. It informed hosting strategies, trade readiness activities, and market access plans.
- 4) The **SANCB Strategy** provided the organisational blueprint for activating the meetings, incentives, conferences, and exhibitions (MICE) sector. It was reviewed and refined in FY2023/24 to improve bid effectiveness, continental positioning, and alignment with available resources.
- 5) The **Service Excellence Initiative**, though not presented as a standalone strategy, framed institutional efforts to uplift tourism quality and frontline experience. It was operationalised through the Basic Quality Verification Programme (BQV), VTSD capacity-building, and campaign-linked service messaging.
- 6) The **Corporate Reputation Index Framework**, elevated in the FY2023/24 and FY2024/25 APPs, responded to improving stakeholder trust. It linked internal culture change with external brand

enhancement, improved governance, and better communication efforts.

- 7) Two additional internal instruments - the **Sustainable Stories Campaign** (2023 - 2024) and the **Product Proposition Sustainability Survey** (2024) - were introduced during the latter part of the review period. These tools supported SA Tourism's positioning on responsible tourism and sustainability alignment. They shaped campaign content, experience packaging, and product narratives across Sho't Left and trade-facing platforms.

In addition to these formally cited strategies, SA Tourism operationalised a suite of organisational frameworks and implementation tools that, while not always listed in the Strategic Plan or APPs, were evident in delivery, oversight reports, and governance instruments:

- 1) The **Stakeholder Engagement Framework** guided structured interaction with public and private partners. Revised in 2023, the framework aligned with the whole-of-state approach to tourism and the District Development Model (DDM), enhancing coordination and feedback mechanisms.
- 2) The **Event Hosting and Strategic Activation protocols** were used to structure support for key events like Meetings Africa (MA), Africa's Travel Indaba (ATI), and regional activations. These tools introduced clearer return on investment (ROI) logic, and improved SMME inclusion.
- 3) The **Transformation and Equity Strategy** framed inclusive participation, supplier diversity, and employment equity. It gained traction across procurement systems, campaign design, and human capital performance indicators.
- 4) The **Visitor Services and Basic Quality Verification Framework**, introduced in FY2023/24, supported ungraded tourism operators in VTSDs. It offered a low-barrier quality benchmark that improved visitor experience and expanded equitable market access.
- 5) The **Sho't Left Campaign** became the anchor for domestic tourism marketing. Strengthened post-COVID-19, it combined affordability messaging with inclusive content and was reaffirmed in the 2025 Strategic Platform Assessment as a key recovery mechanism.
- 6) The **Events Strategy (Concept and Integration Proposal)** was under review during FY2023/24 to FY2024/25. It aimed to consolidate SA Tourism's mega and lifestyle events approach, close bidding gaps, and align MICE planning with transformation and spatial equity.
- 7) The **Business Events Brand Equity Study**, piloted in 2023, measured global perceptions of South Africa as a business events destination. Its findings informed bid strategy, trade marketing, and SANCB repositioning.
- 8) The **Organisational Hosting Strategy** enhanced regional collaboration, supply chain localisation, and MA's role as a pan-African business events catalyst.
- 9) The **Information and Communications Technology (ICT) Strategy and Analytics Systems Framework**, referenced in FY2023/24 and FY2024/25, guided the modernisation of SA Tourism's digital platforms, analytics tools, and insight dashboards. While not a formal customer relationship management system, post-MTR tools enabled partner segmentation, performance tracking, and audience engagement monitoring, supported by the MPIF and Performance Information Management Frameworks (PIMF).
- 10) The **SMME Support Practice Model** guided onboarding and integration of small enterprises into hosted platforms and VTSD portfolios. Its practical design shaped delivery inclusion, particularly for women, youth, and persons with disabilities (WYPD) suppliers.

- 11) **The internal audit and risk management plans** supported assurance systems, audit readiness, and consequence management. These plans gained importance after the FY2021/22 AGSA outcomes and were consistently referenced in quarterly performance reports (QPR) and ARs.
- 12) The **People and Culture Framework / Human Resource Development Strategy** guided transformation, retention, and organisational morale interventions. They responded directly to declining workplace trust indicators and were increasingly formalised from 2023 onward.

In addition to the above, several strategic instruments were introduced internally between 2022 and 2024 to strengthen SA Tourism's organisational planning and evaluation architecture. The legacy Planning, Reporting and Monitoring Framework (2015) was used from 2020 for annual planning, performance monitoring, reporting, and evaluations. This framework was formally replaced by 2024 with a new planning, performance information management and evaluation of implementation programme frameworks. Five frameworks were developed and/or strengthened between 2022 and 2024 to enhance organisational planning, performance information management, monitoring, reporting, and evaluation. These included:

- 1) The **Planning Framework (2022)** was developed to ensure improvements in the planning process and ensure alignment with the Revised Framework for Strategic Plans and Annual Performance Plans and the Guidelines for the Implementation of the Revised Framework for Strategic Plans and Annual Performance Plans issued by the Department of Planning, Monitoring and Evaluation.
- 2) The **Programme Evaluation Framework (2022)** introduced standardised implementation programme evaluation design and planning tools aligned to utilisation-focused principles.
- 3) The **Strategic Planning Framework (2024)** was revised to redefine the organisation's planning logic, outcomes architecture, and alignment with national priorities. It provided a revised approach to sub-outcome design, planning logic, and national alignment.
- 4) The **Revised Framework for Evaluating Implementation Programmes (2024)**, expanded the evaluation approach, Theory of Change design, and feedback loops for implementation programme improvement. Together with the Programme Evaluation Framework (2022) and the Revised Framework for Evaluating Implementation Programmes (2024), these tools embedded a utilisation-focused performance culture and positioned strategic planning and PME as organisational enablers of delivery integrity.
- 5) The **Performance Information Management, Monitoring and Reporting Framework (2024)**, improved SA Tourism's management of performance information, monitoring and reporting as well as indicator protocols, systems, and data assurance practices, and enhanced enhanced indicator protocols, dashboard usage, and audit-readiness systems.

While not published in the Strategic Plan, their influence was substantive in shaping Strategic Plan and APP development from 2023 onward and improving performance at a programme and organisational level.

Several influential initiatives, including the "Team BEST" creative platform, "Welcome SA" messaging, and business events campaigns, played central roles in delivery. However, because they were not adopted as standalone organisational strategies in approved planning documents, they are not listed in this section. Their operational contribution is assessed in Part D of this report.

In the final year of the planning cycle (FY2024/25), several forward-facing frameworks were developed to shape the next strategic horizon. The South African Integrated Tourism Brand Strategy, tabled in January 2025, provides for refreshed brand architecture for global campaigns, Sho't Left, SANCB, and business event platforms. The exploratory work on a Sustainability Framework, introduced in 2024, advocates for a

structured approach to embedding environmental and responsible tourism principles into campaigns and stakeholder-facing initiatives. Although neither was implemented during the review period, both were informed by 2020 - 2025 lessons and stakeholder inputs. At the time of producing this report, the Sustainability Framework was developed.

Together with the Corporate Strategy (2025 - 2040) and MPIF, these instruments signal the organisation's strategic renewal and repositioning. While their impact will materialise in the 2025 - 2030 period, their conceptual roots are grounded in the performance experiences and structural shifts captured in this End of Term Report.

Together, these organisational strategies and frameworks shaped how SA Tourism translated its legislative mandate and policy obligations into tangible, performance-linked programmes over the 2020 - 2025 period. Their combined effect enabled planning continuity, strategic responsiveness, and evidence-informed decision-making across a period marked by volatility, scrutiny, and structural adaptation. The refinements made to SA Tourism's planning, monitoring, reporting, and evaluation architecture during this time laid the foundation for a more coherent and data-driven organisational approach going into the 2025 - 2030 planning cycle.

PART B: OUR STRATEGIC FOCUS

SA Tourism's Five-Year Strategic Plan 2020 - 2025 set out a bold, integrated vision for inclusive tourism growth, organisational renewal, and international competitiveness. This vision was supported by a defined strategic results framework (Theory of Change), and a clearly defined set of organisational values, which together shaped delivery logic and programme alignment across a disrupted yet adaptive five-year period.

This section comprehensively reconstructs that strategic focus. It reflects how the vision, mission, values, and organisational logic were originally framed; how they evolved in response to contextual volatility and implementation learning; and how they shaped organisational delivery over the five-year period.

The narrative tracks the strategic intent from design to implementation, including the introduction of a refined sub-outcome structure and a clarified delivery framework. Together, these elements define what SA Tourism set out to achieve, how it was structured to deliver, and the logic against which performance is assessed in Part D of this report.

4. VISION, MISSION, AND VALUES

The **vision** articulated in the Five-Year Strategic Plan remained unchanged across the five years:

South Africa positioned as an exceptional tourist and business events destination that offers a value-for-money, quality tourist experience that is diverse and unique.

This long-term aspiration anchored the organisation's dual focus on global positioning and inclusive growth. It was reaffirmed in all APPs and operationalised through branding tone, experience design, and platform positioning. From 2021 onwards, this vision found renewed expression through a wide range of organisational efforts, including domestic mobilisation campaigns, global repositioning strategies, strategic trade platforms, regional partnerships, and reforms to enhance visitor experience quality and inclusion.

The **mission statement**, also stable in wording throughout the reporting period, translated the vision into six strategic commitments that defined organisational purpose:

- 1) Implementing an integrated tourism marketing strategy for South Africa.
- 2) Promoting South Africa as a world-class business events destination.
- 3) Facilitating the delivery of service-oriented, quality-assured tourism experiences.
- 4) Positioning South African Tourism as an industry thought leader.
- 5) Championing a digital outlook for the industry.
- 6) Enhancing stakeholder participation and collaboration.

While the mission statement remained unchanged, its interpretation evolved across the five years. All six pillars, from integrated marketing and business events to stakeholder engagement, the quality of the visitor experience, and digital transformation, were progressively operationalised. From FY2021/22 onwards, this was especially evident in programme design, organisational reforms, and APP amendments, which collectively embedded the mission's logic across all five budget programmes.

The organisation's **values**, aligned with the Batho Pele principles, served as the ethical and cultural foundation throughout the reporting period:

- **Integrity:** We do things consistently, ethically and honestly regardless of the circumstances.
- **Respect:** We treat everyone with utmost dignity, inclusiveness, openness, tolerance and a sense of appreciation of diversity.
- **Authentic / Caring:** We show and act with genuine care to each other, customers, shareholder, partners, suppliers and the business.
- **Responsibility:** We take personal accountability for delivering work that exceeds customers' and stakeholders' expectations.
- **Excellence:** We take pride in and commit to always meeting and exceeding our customers' and stakeholders' expectations with outstanding quality.

While unchanged in definition, these values gained heightened relevance in the post-COVID-19 recovery period. They were referenced in all APPs and ARs and became central to SA Tourism's efforts to rebuild trust, reframe stakeholder relationships, and uphold organisational credibility.

5. STRATEGIC INTENT AND RESULTS FRAMEWORK

The Five-Year Strategic Plan articulated a structured results framework that provided clear alignment between national development ambitions and SA Tourism's mandate. While a formal Theory of Change was not published in the Strategic Plan itself, its core principles were embedded in the design of the results architecture and later used as an internal tool to strengthen delivery coherence and indicator alignment.

The strategic intent was expressed through a single impact statement, two long-term strategic outcomes, and a supporting set of outcome-level indicators with five-year targets. These were set out in the Five-Year Strategic Plan and formally amended, where required, through Annexure A to in the relevant APPs. Together, these components formed the basis for planning, budgeting, organisational delivery, and performance tracking throughout the reporting period.

Impact Statement: SA Tourism's Developmental Goal

At the centre of SA Tourism's strategic posture for the 2020 - 2025 period was an overarching impact statement, as set out in the Five-Year Strategic Plan:

Tourism in South Africa grows and increasingly contributes to GDP, job creation, inclusive economic participation, and is enjoyed by all South Africans.

This statement, while not assigned specific indicators or directly measured through performance targets, expressed the organisation's long-term developmental goal. It reflected a shared vision of tourism as a catalytic force for inclusive growth, transformation, and societal benefit - one that SA Tourism would contribute to through its organisational mandate and performance, rather than deliver alone.

It provided overarching direction for the organisation's work across the five-year period, anchoring its strategic logic to broader national development goals, including those of the NDP, the MTSF, the NTSS, the ERRP, the TSRP and later the TSMP.

While not directly measured, the intent behind the impact statement is assessed in this report using a set of aggregate and proxy indicators across four dimensions, including:

- 1) Tourism's contribution to gross domestic product (GDP).
- 2) Employment trends in the tourism sector.
- 3) Patterns of inclusive participation (e.g. women, youth, township-based enterprises).
- 4) Public benefit and usage, reflected through domestic travel and visitor access.

These dimensions are analysed in Part D of this report. While SA Tourism was not solely responsible for achieving this developmental goal, its organisational strategy was explicitly designed to contribute to its advancement.

Strategic Outcomes and Outcome Indicator Framework

To give effect to its developmental goal, its Five-Year Strategic Plan committed SA Tourism to two long-term strategic outcomes. These outcomes articulated the organisation's contribution to national development priorities and served as the organising logic for planning, budgeting, delivery, and performance tracking over the five-year period.

- 1) **Outcome 1: Increase the tourism sector's contribution to inclusive economic growth:**
Aligned to MTSF Priority 2 (Economic Transformation and Job Creation) and Priority 7 (A Better Africa and World), this outcome focused on enabling growth in tourism volumes and value across international and domestic markets. It placed emphasis on demand stimulation, market diversification, seasonal and geographic spread, and broader inclusion - especially through SMME participation and support for historically disadvantaged groups.
- 2) **Outcome 2: Achieve good corporate and cooperative governance:**
Aligned to MTSF Priority 1 (A Capable, Ethical and Developmental State), this outcome addressed SA Tourism's organisational integrity, audit and compliance performance, stakeholder trust, and system-level coordination. It encompassed both internal governance effectiveness and the organisation's evolving role in leading and partnering across the tourism ecosystem.

Both outcomes were retained in their original form throughout the five-year period. They were reaffirmed in all five APPs and served as the basis for output planning, indicator tracking, and organisational

performance evaluation.

Each outcome was supported by a focused set of outcome-level indicators and five-year targets, published in the Five-Year Strategic Plan and formally amended as needed through Annexure A of the FY2021/22 to FY2024/25 APPs. These amendments reflected post-COVID-19 feasibility adjustments and refinements based on the 2022 MTR and stakeholder engagement processes.

The table below presents the original and final approved outcome indicator set, as amended through the five-year term. These are the five-year targets against which outcome performance is assessed in Part D.

Amendments to Outcome Indicators, Baselines and 5-Year Targets (Annexure A of the relevant APPs)

Outcome	Original Indicator	Revised Indicator	Original Baseline	Revised Baseline	Original Five-Year Target	Final Approved Five-Year Target	Amendments and Notes
Outcome 1: Increase the tourism sector's contribution to inclusive economic growth	Brand Strength Index	n/a	41.0	n/a	44.7	n/a	Removed in the FY2021/22 APP Annexure A due to inconsistent data during COVID-19, thus repositioned to operational tracking
	Percentage increase in international tourist arrivals	Progress towards doubling international tourist arrivals to 21 million by 2030 (State of the Nation Address (SONA) 2019)	10.4 million	10.3 million	Increase international tourist arrivals with 6% annually by 2024 (14.8 million)	10.3 million	Target revised downward in FY2021/22 APP Annexure A due to impact of COVID-19.
	Percentage increase in the value of international tourist spend	Rand value of international tourist spend	R87.4 billion	R90.7 billion	Increase the value of international tourist arrival with 4% each year (R128.6 billion)	R86.7 billion	Target revised downward in FY2023/24 APP Annexure A due to slow recovery in high-value markets.
	Increase in the number of domestic holiday trips	Number of domestic holiday trips	3.0 million	7.1 million	8.3 million	10.8 million	Target revised upward in FY2023/24 APP Annexure A due to stronger than expected domestic rebound.
	Increase in the value of domestic holiday direct spend	Value of domestic holiday direct spend	R10.1 billion	R17.3 billion	R19.5 billion	R33.5 billion	Target increased in FY2023/24 APP Annexure A due to domestic spend outperformance from FY2022/23.
	Percentage increase in	n/a	3.19% direct employment	n/a	Tourism's direct employment	n/a	Removed in FY2021/22 APP Annexure A as it is beyond the

Outcome	Original Indicator	Revised Indicator	Original Baseline	Revised Baseline	Original Five-Year Target	Final Approved Five-Year Target	Amendments and Notes
	tourism's direct contribution to employment		increase in 2019		increase by a rate of 2.67% per annum by 2024		control of SA Tourism (impact level).
	Percentage growth in tourism's direct contribution to the GDP	n/a	4.53% growth in tourism's direct contribution to the GDP in 2019	n/a	3.23% growth in tourism's direct contribution to the GDP per annum by 2024	n/a	Removed from FY2021/22 Annexure A as it is beyond the control of SA Tourism (impact level).
	Geographic spread of international tourist arrivals	n/a	20%	n/a	25.0%	13.9%	Target reduced in FY2023/24 Annexure A due to continued travel concentration post-COVID-19.
	Geographic spread of domestic tourist arrivals	n/a	8.4%	8%	15.0%	8.0%	Baseline and target revised downward post-COVID-19 in FY2021/22 APP Annexure A.
	Seasonality of international tourist arrivals		1.36%	1.3%	1.29%	1.0%	Indicator retained but refined in FY2023/24 APP Annexure A to better reflect strategic emphasis on inclusive and consistent visitor distribution, especially post-COVID-19, aligning with recovery and domestic travel expansion strategies.
	Total number of international business events hosted (cumulative)	n/a	207	230	270	111	Baseline revised in FY2021/22 APP Annexure A due to the higher than anticipated performance by March 2020. Target revised in FY2021/22 APP Annexure A due to the impact of COVID-19.

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Outcome	Original Indicator	Revised Indicator	Original Baseline	Revised Baseline	Original Five-Year Target	Final Approved Five-Year Target	Amendments and Notes
	Number of SMMEs supported	Number of SMMEs supported (cumulative)	207	182	225	1 096 (cumulative 2020/21 to 2024/25)	Baseline revised in FY2021/22 APP Annexure A due to the impact of COVID-19. Target significantly increased FY2024/25 APP Annexure A to reflect expanded focus on transformation.
Outcome 2: Achieve good corporate and cooperative governance	External audit outcomes	n/a	Unqualified audit outcome	n/a	Unqualified audit outcomes maintained	n/a	Indicator and target retained unchanged.
	South African Tourism Reputation Index	SA Tourism Corporate Brand Index	New indicator Baseline to be determined in 2020/21	n/a	Improvement from 2020/21 baseline	74.24 SA Tourism Corporate Brand Index	The baseline of 68.24 was determined in FY2021/22.

The outcome indicator and target amendments presented above reflect an evolving implementation context that required improved alignment between strategic intent, output design, and performance tracking. While the two strategic outcomes remained unchanged throughout the five-year period, their supporting frameworks were progressively refined to enhance delivery clarity and organisational coherence. This process culminated in a key reform introduced in FY2023/24, namely the adoption of a structured sub-outcome model to better group and attribute outputs under each outcome.

Several of the key frameworks now shaping the 2025 - 2030 strategic horizon, including the Integrated Tourism Brand Strategy and the sustainability positioning approach, were informed by delivery lessons, gaps, and performance insights from the 2020 - 2025 cycle. Their formal implementation falls outside this review period, but their conceptual development began during it.

Refining Strategic Delivery: The Introduction of Sub-Outcomes (2023 - 2025)

By the midpoint of the strategic cycle, SA Tourism recognised the need to refine its organisational delivery framework to ensure better alignment between strategic intent, programme planning, budget structure, and output delivery. This insight emerged through multiple channels, including the 2022 MTR, AGSA Reports, internal performance reviews, and stakeholder consultations.

In response, the organisation introduced a formal sub-outcome structure in FY2023/24 Annual Performance Plan (Annexure A). This was not a change to the two approved strategic outcomes, which remained consistent throughout the 2020 - 2025 period. Rather, it was a targeted organisational reform designed to strengthen internal logic, improve the traceability of outputs to outcomes, and align performance more coherently with SA Tourism's five budget programmes.

This shift brought long-needed clarity to previously fragmented output structures. It grouped similar interventions under focused thematic delivery streams and clarified internal responsibilities across business units. In doing so, it strengthened the line of sight from organisational delivery to national development outcomes.

The four sub-outcomes, formally adopted in FY2023/24, were structured as follows:

- **Outcome 1: Increase the tourism sector's contribution to inclusive economic growth**
 - Demand Creation: Positioning South Africa as a preferred leisure and business events destination through integrated marketing, brand positioning, strategic trade platforms, and partnership-led campaigns.
 - Demand Fulfilment: Enhancing visitor experience quality, satisfaction, and equity through improved access, inclusive product packaging, VTSD initiatives, and consistent delivery

STRATEGIC COHERENCE AND DELIVERY CLARITY (2023–2025)

“The FY2023/24 sub-outcome structure enabled clearer attribution and more coherent delivery mapping across programmes.”

- ExCo Strategic Planning Presentation, December 2023

This view, consistently echoed in internal programme reviews and strategic assessments, reflects the pivotal organisational shift made during the latter half of the strategic cycle. The introduction of a sub-outcome model in FY2023/24 APP was more than a technical amendment - it was a strategic recalibration. It responded directly to implementation learning, audit commentary, and the need for better alignment between outputs, budgets, and performance results.

Across all business units, this revised structure improved strategic logic, clarified internal roles, and enabled stronger linkage between marketing, experience delivery, governance, and intelligence functions. The model brought long-needed coherence to previously fragmented output clusters and allowed for more targeted performance tracking and evaluation.

standards.

▪ **Outcome 2: Achieve good corporate and cooperative governance**

- Relevant Tourism Intelligence and Digital Ecosystem: Advancing integrated systems, analytics, dashboards, and research platforms to support evidence-based planning and performance tracking.
- Improved Corporate Reputation: Strengthening organisational trust, ethical governance, audit integrity, stakeholder engagement, and cultural transformation.

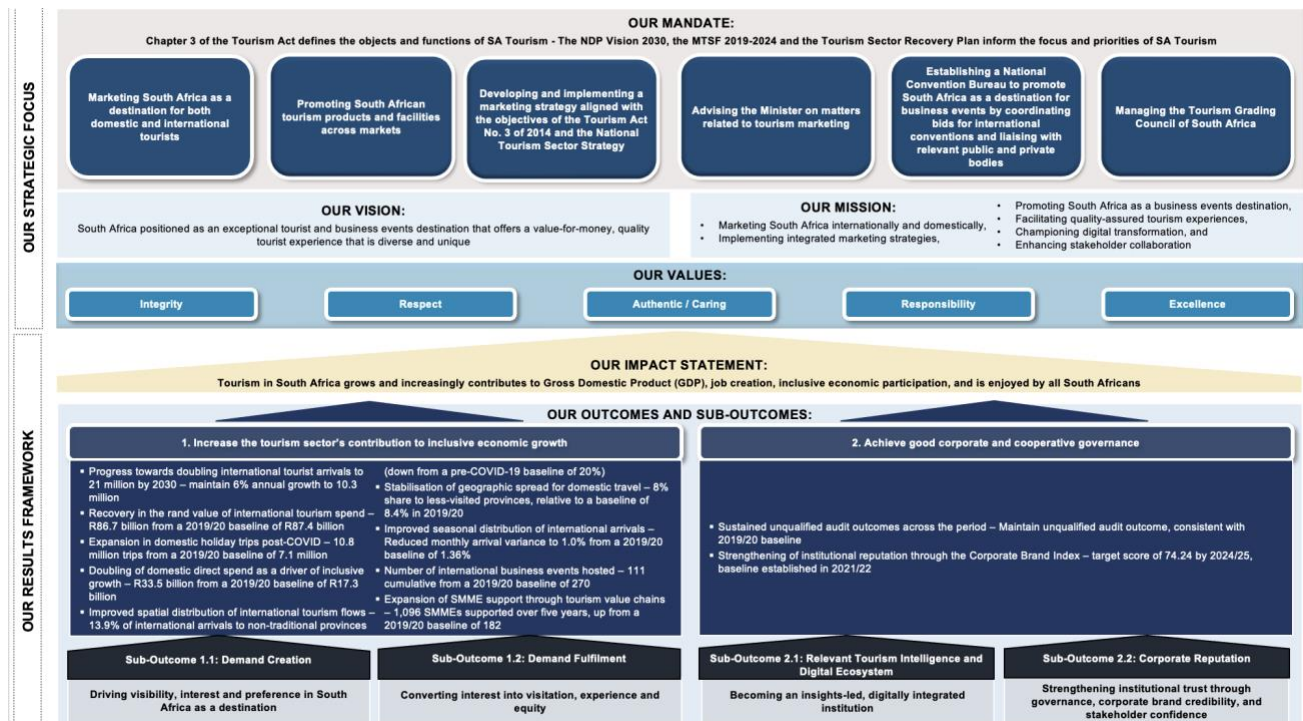
From FY2023/24 onward, all organisational outputs were realigned and consolidated under these four sub-outcomes. This reform brought together interventions that had previously been scattered across different programme areas and reframed them into cohesive delivery clusters:

- Demand Creation unified both consumer and business-facing campaigns, including global brand messaging, domestic mobilisation (e.g. Sho't Left), platform visibility (e.g. Africa's Travel Indaba, Meetings Africa), public relations, bidding support, and trade shows - drawing primarily from Programmes 3 and 4.
- Demand Fulfilment grouped efforts to improve the on-the-ground experience, including TGCSA grading, signage, hosting, VTSD product packaging, safety messaging (e.g. Travel Wise Mzansi), and deal-driven conversions - led by Programme 5, but supported by Programmes 3 and 4.
- Tourism Intelligence consolidated previously fragmented analytics and survey instruments, trend reporting, and strategic research into a digital ecosystem approach - anchored in Programme 2, with delivery integration across the organisation.
- Corporate Reputation brought together ethical compliance systems, risk and audit management, stakeholder engagement strategies, and culture transformation (e.g. Team BEST elements, Corporate Reputation Index, employee engagement surveys) - primarily within Programme 1, with support from Programme 2 and all programmes.

The outputs associated with each sub-outcome were not newly invented; they were drawn from the original Five-Year Strategic Plan, refined across five APPs, amended via Annexure A processes, and validated through quarterly reports, evaluations, annual strategic reviews, stakeholder feedback, and performance analyses. Their clustering under sub-outcomes enabled a more intelligible organisational narrative and strengthened performance evaluation rigour.

This architecture - comprising the two strategic outcomes, four sub-outcomes, and their clustered organisational outputs - forms the basis of the performance assessment presented in Part D of this report. It represents the final, consolidated structure through which SA Tourism's delivery efforts may be assessed, contextualised, and validated against its developmental mandate.

Figure: SA Tourism's Strategic Focus and Results Logic (2020 - 2025)



PART C: OUR STRATEGIC OPERATING ENVIRONMENT

This section outlines the external environment in which SA Tourism implemented its Five-Year Strategic Plan and delivered its programmes. It does not assess performance - that is the purpose of Part D - but instead seeks to provide the backdrop against which implementation must be understood.

The 2020 - 2025 period was defined by profound global disruption, uneven regional recovery, domestic volatility, and rising stakeholder scrutiny. These dynamics shaped not only what was possible, but also what was prioritised - influencing everything from strategic focus to campaign timing, stakeholder engagement, and delivery logic. As such, organisational performance over the five-year cycle cannot be interpreted without reference to the context in which it occurred.

To provide a full picture of this context, Part C draws on verified evidence from global, continental, and national sources, including international tourism benchmarks, economic trend reports, policy frameworks, institutional strategy documents, and official performance publications. It synthesises the most material external factors that directly or indirectly constrained delivery, reshaped priorities, or created new strategic opportunities for South African Tourism.

This analysis is organised across four thematic lenses:

- 1) Global disruptions and recovery trajectories.
- 2) Continental and regional dynamics.
- 3) National policy, fiscal, and sectoral shifts.
- 4) Organisational conditions of operation.

While these four lenses guide the structure of this section, they unfolded over time through a dynamic operating cycle. The five-year period can also be understood in terms of four distinct time-based phases, each representing a different set of strategic imperatives and organisational adaptations:

- Shock and Collapse (2020 - 2021): characterised by the sharpest contraction in global travel ever recorded and the suspension of normal operations.
- Staggered Reopening (2021 - 2022): marked by uneven recovery, regional constraints, and a shift in traveller expectations.
- Strategic Realignment (2023 - 2024): defined by the adoption of insight-driven, trust-led, and platform-enabled repositioning.
- Stabilisation and Forward Pivot (2024 - 2025): focused on governance recovery, sustainability framing, and strategic planning for the next cycle.

The following figure presents this time-based evolution, summarising how the external environment evolved and how SA Tourism responded institutionally at each stage.

Figure: SA Tourism’s Strategic Operating Environment and Organisational Response (2020 - 2025)



Together, the phased trajectory and the thematic analysis that follows provide the analytical foundation for situating SA Tourism’s performance and delivery within its operating reality.

6. GLOBAL DISRUPTIONS AND RECOVERY TRAJECTORIES

From 2020 to 2025, South African Tourism operated within a global tourism environment that was fundamentally disrupted, restructured, and redefined. The five-year period began with the sharpest collapse in international travel ever recorded, followed by a fragmented recovery marked by volatility, digital transformation, and shifting traveller expectations. Global conditions materially influenced destination competitiveness, campaign responsiveness, and the recovery pathways available to SA

Tourism.

COVID-19 and the Collapse of International Tourism (2020)

The COVID-19 pandemic triggered a near-total cessation of global travel. According to the UNWTO World Tourism Barometer, international tourist arrivals declined by 72% in 2020, causing catastrophic economic losses in tourism-dependent economies. Global lockdowns, border closures, and the suspension of commercial aviation disrupted every facet of the tourism value chain. South Africa experienced one of the most prolonged border closures globally, impacting both leisure and business travel, and triggering a full reset of organisational targets, budgets, and delivery assumptions.

At this point, international demand collapsed, and destination marketing strategies globally shifted from activation to reassurance. The Five-Year Strategic Plan's original performance baselines, targets and assumptions were rendered obsolete almost immediately, requiring full revision through Annexure A of FY2020/21 APP.

Uneven Reopening and Volatile Recovery (2021 - 2022)

As vaccination campaigns progressed and border restrictions eased, global tourism began to rebound in 2021, though unevenly across regions. Africa and Asia-Pacific recovered more slowly due to access limitations, fragile airlift, and delayed re-entry into key source markets. Advanced economies reopened faster, capturing pent-up demand and directing recovery momentum away from the global south.

Global arrivals reached 63% of pre-pandemic levels by 2022 (WTTC, UNWTO), but the rebound was erratic. Confidence indices remained fragile, booking patterns shortened, and demand was skewed toward low-risk, high-familiarity destinations. Traveller behaviour became more price-sensitive, digital-first, and focused on safety, reassurance, and perceived value.

During this period, SA Tourism was compelled to shift emphasis to domestic mobilisation, recalibrate campaign messaging, and redesign platforms to support post-COVID-19 traveller expectations. All international-facing recovery was delayed relative to original expectations set in 2020.

Demand Rebound, Digital Acceleration, and Platform Shifts (2023 - 2024)

Global tourism surged in 2023, with international arrivals reaching 88% of 2019 levels (Oxford Economics, UNWTO, WTTC). Key markets in Europe and the Middle East outperformed, while air access constraints and inflation limited the pace of recovery elsewhere. Destination marketing organisations (DMOs) globally adopted hybrid campaign models, integrated booking tools, and data-backed analytics to respond to new market dynamics.

At the same time, global tourism competitiveness began shifting toward emotional trust, experience personalisation, and value equity rather than simple brand awareness. WTTC, SANCB, and UNWTO trend analyses showed that DMOs that could integrate brand and delivery logic - linking campaigns directly to itinerary conversion and traveller experience - achieved stronger post-COVID-19 traction.

SA Tourism's investment in digital architecture, campaign return on investment modelling, booking conversion analytics, and insights and analytics during this phase was consistent with these trends. The Sho't Left platform, SANCB repositioning, and digital toolkits were adjusted to reflect new global expectations around convenience, relevance, and value.

Sustainability and Long-Haul Pressure (2022 - 2025)

As sustainability emerged as a key competitive factor, long-haul destinations like South Africa faced

increased reputational scrutiny. Emissions sensitivity, especially in European markets, drove growing demand for short-haul, lower-emission alternatives. SA Tourism responded by strengthening its brand messaging around authenticity, social value, and environmental consciousness - elements increasingly reflected in its campaign logic, hosted itineraries, and value proposition design.

A Normalising Sector with Emerging Risks (2024 - 2025)

By 2024, global international arrivals had returned to pre-pandemic levels in aggregate, but the recovery remained fragile and unequal. Geopolitical shocks (e.g. the Red Sea shipping crisis, aviation fuel spikes, and regional conflict zones), inflation, aviation cost volatility, and shifting visa regimes introduced new risks. The WTTC and UNWTO both projected continued demand but warned of a plateau unless resilience, inclusion, and experience innovation were embedded in organisational strategy.

Destination reassurance continued to matter. Hygiene, health protocols, and visible safety infrastructure, first introduced in 2020, remained part of the competitive toolkit, alongside hybrid events, content-led storytelling, and platform-enabled visitor flows. These themes were directly reflected in the messaging, strategic emphasis, and delivery platforms supported by SA Tourism between 2023 and 2025.

Implications for SA Tourism's Strategic Positioning

This global turbulence reshaped both the possibilities and constraints for SA Tourism:

- 1) Original strategic assumptions became rapidly outdated, forcing organisational reorientation and resetting of outcome targets.
- 2) Market access and timing placed South Africa at a disadvantage in early recovery years, especially relative to Europe, the Middle East, and selected parts of Asia.
- 3) Digital enablement and personalisation became dominant global DMO strategies, which SA Tourism progressively adopted from 2022 onwards through digital roll-out, booking integration, and platform analytics.
- 4) Traveller priorities shifted - from brand awareness to trust, value, and emotional connection. This underpinned the evolution of messaging strategy, campaign formats, and visitor engagement tactics.

POST-COVID-19 CAMPAIGN AND BRAND REPOSITIONING

"South Africa is where you go to wake up your senses. It only takes one visit to be transformed and renewed."

- Strategic Platform Manifesto, Global Marketing Toolkit, 2023

This line from the approved creative platform summary was designed to reposition South Africa not just as a destination, but as a transformative experience. It underscores the values logic behind the brand messaging in the 2022 – 2025 campaigns.

These global conditions formed the backdrop to SA Tourism's delivery performance over the strategic cycle. They contextualise both the challenges faced, and the organisational adaptations made, a framing that informs the performance assessment in Part D of this report.

7. CONTINENTAL AND REGIONAL DYNAMICS

SA Tourism's operating environment between 2020 and 2025 was significantly shaped by continental shifts in policy, regional recovery dynamics, and the complex evolution of intra-Africa travel patterns. While global recovery gained momentum by 2022, Africa's tourism revival remained fragile, uneven, and deeply influenced by structural barriers and emerging opportunities. For SA Tourism, this context demanded continuous adaptation of its Africa strategy, increased emphasis on regional relevance, and a recalibration

of its delivery logic to better reflect both constraints and prospects on the continent.

This section of the report presents the continental and regional trends that influenced organisational focus and delivery design during the strategic period. It provides the critical backdrop for understanding shifts in demand, programme logic, partnership focus, and reputational engagement - all of which are evaluated in Part D of this report.

Slow and Uneven Recovery Across Africa

While global arrivals rebounded to 63% of pre-pandemic levels by 2022 and nearly 88% by 2023 (UNWTO, WTTC), Africa lagged behind. Sub-Saharan Africa in particular faced prolonged disruptions due to limited vaccine access, weaker aviation recovery, and fragile economic conditions. North Africa outpaced the continent due to its proximity to European source markets and stronger charter agreements.

This disparity was acutely felt by SA Tourism. Key source markets such as Nigeria, Kenya, and Ghana only began to stabilise by FY2023/24. Performance reports and APPs confirmed the challenge of driving regional arrivals amidst constrained connectivity, low consumer confidence, and affordability concerns. As a result, SA Tourism shifted its approach - recalibrating budgets across growth, defend, and watch markets and introducing targeted East and West Africa campaigns aligned to recovery readiness.

The African Continental Free Trade Area and Regional Integration Imperatives

The African Continental Free Trade Area (AfCFTA), adopted in 2021, offered a long-term policy signal for regional tourism integration. Though implementation across countries was uneven, it reframed tourism as an instrument of services trade, regional movement, and brand collaboration. For SA Tourism, this reinforced its positioning of South Africa as a gateway and hub for continental tourism and MICE.

This shift was particularly evident in the repositioning of Meetings Africa as a regional platform - not only to host but also to facilitate continental co-branding, inter-country itineraries, and value chain localisation - and demand-led itineraries across multiple countries. Strategy presentations and APPs reflected this logic from FY2022/23 onwards, especially in the SANCB-aligned business events strategy.

Persistent Visa and Border Management Barriers

Despite African Union (AU) commitments to travel facilitation, regional mobility remained constrained. Fragmented visa regimes and onerous border controls continued to inhibit intra-Africa travel, especially for leisure and SMME-led tourism. South Africa's own visa regime was flagged in stakeholder surveys as a limiting factor for key regional markets.

SA Tourism's advocacy, particularly through Department of International Relations and Cooperation (DIRCO) and the Department of Trade, Industry and Competition (the dtic) channels, became more prominent from 2022 onward. While SA Tourism could not directly legislate change, it leveraged its position in public diplomacy platforms and marketing narratives to position South Africa as a facilitative destination. This was supported by the use of hosted trade events, memoranda of understanding (MoU), and stakeholder-led campaigns to address prevailing perceptions.

Accelerating the Role of Business Events and Regional MICE Competition

Business events and exhibitions regained traction post-COVID-19 as instruments of economic diplomacy and value chain development. Countries like Rwanda, Kenya, and Ghana aggressively scaled up their MICE offerings between 2022 and 2024.

In response, SA Tourism, through the SANCB, repositioned Meetings Africa and related platforms as

inclusive and regionally collaborative. Bilateral hosting partnerships and intra-Africa buyer strategies were deployed. The APPs from FY2023/24 explicitly identified these partnerships as a mechanism for building sectoral resilience and reinforcing South Africa’s role as a regional anchor for business events.

Digital Divide and Smart DMO Leadership

Digital infrastructure disparities persisted across African tourism boards. While internet penetration and mobile access improved, many DMOs remained under-capacitated in data analytics, segmentation tools, and personalised content systems.

SA Tourism responded by reinforcing its commitment to the Integrated Digital and Analytics Framework. From FY2022/23, it positioned itself as a regional thought leader and smart DMO in destination management - leveraging audience segmentation tools, insight dashboards, and platform tracking to enhance internal performance and support cross-border engagements. Knowledge-sharing through training, technology partnerships, and practical toolkits became an increasingly visible feature of SA Tourism’s Africa-facing trade strategy.

Inclusive Entrepreneurship and Youth-Led Innovation

Regional trends highlighted growing youth and women participation in tourism entrepreneurship, particularly in digital, sustainable, and experience-based niches. However, limited financing, formal support, and promotional platforms inhibited their scale.

SA Tourism aligned its WYPD transformation agenda to these continental trends. From FY2021/22, APPs and ARs reflect stronger procurement alignment, hosted buyer inclusion, and storytelling components that elevated young and women-led African tourism ventures. This also enhanced regional trust and positioned South Africa as a champion of inclusive tourism through hosted buyer platforms, trade missions, and entrepreneurial storytelling.

Reputational Risk and Regional Perception Management

South Africa’s regional image was periodically impacted by xenophobia-related incidents, safety concerns, and governance instability. These risks were amplified by limited public relations (PR) capability in regional markets and growing competition for continental trust.

SA Tourism responded by introducing the Corporate Brand Index and investing in targeted regional stakeholder engagement. These included diaspora briefings, regional media campaigns, and ExCo-led diplomacy, especially in Southern African Development Community (SADC) and Economic Community of West African States (ECOWAS) markets.

REGIONAL RECOVERY AND THE
EMOTIONAL ECONOMY OF TRAVEL

“We weren’t just competing for attention – we were competing for trust.”

- Strategy Review Presentation, ExCo, August 2023

This insight, shared during an internal strategic review, summarises a fundamental truth of post-COVID-19 regional tourism dynamics: destinations were no longer simply marketing products, they were rebuilding emotional contracts. For African travellers, trust, safety, inclusion, and familiarity became as important as price or itinerary.

For SA Tourism, this meant rethinking its Africa-facing posture. From 2022 onwards, messaging strategies were recalibrated to highlight shared cultural identity, visitor safety protocols, and meaningful experience. Platforms such as Sho’t Left and Meetings

Africa were retooled to convert interest into trust, and trust into action.

This reframing of the emotional economy of travel helped SA Tourism reposition itself not just as a tourism promoter, but as a continental partner with relevance, reliability, and resonance.

Air Access, Connectivity, and SADC Fragility

Air access remained a binding constraint on regional tourism recovery. South African carriers faced capacity issues, while many African airlines remained grounded or offered irregular frequencies. The SADC region, a core market for SA Tourism, suffered from poor interlinkages and escalating ticket prices.

SA Tourism's airlift strategy, integrated in the FY2023/24 APP, focused on aligning marketing to available seat capacity, supporting bilateral air service agreements, and prioritising markets with defensible access. Notably, Zimbabwe, Lesotho, and Mozambique were repositioned with targeted regional travel campaigns and trade incentives.

Converging Trends: Technology, Trust, and Conversion

Finally, a defining regional shift over the period was the move toward digitally enabled experience personalisation, hybrid brand-to-booking models, and technology-enhanced conversion pathways. Leading regional peers such as Rwanda and Kenya accelerated the development of integrated visitor platforms, including audience-linked booking portals, voucher engines, and mobile-first tools.

In this context, SA Tourism's Sho't Left platform was independently assessed in 2023 through a Strategic Platform Review titled "It's Your Country, Enjoy It." The assessment confirmed that Sho't Left retained strong brand equity and remained fit-for-purpose but required enhanced digital capabilities for conversion. Following this, the platform's relaunch embedded four validated differentiators: mobile-first design, digital vouchers, curated experience bundling, and marketing functionality informed by user segmentation data. These enhancements positioned South Africa competitively ahead of most regional DMOs on the conversion journey from interest to booking.

In parallel, Africa-facing trade platforms such as Meetings Africa introduced digital-ready packaging and buyer interface demands, which SA Tourism progressively embedded from 2023, including lead tracking and business to business (B2B) engagement systems. These shifts underscore the strategic importance of digital trust, tech-enabled fulfilment, and integrated campaign ecosystems for maintaining regional advantage.

Implications for SA Tourism's Strategic Positioning

SA Tourism's strategic posture in Africa from 2020 to 2025 was not only shaped by challenges, but also by its ability to adapt, influence, and lead. The regional landscape remained marked by structural weaknesses, but SA Tourism's evolution - in digital strategy, advocacy, reputation management, and continental platforms - allowed it to reposition as a smart, inclusive, and responsive regional DMO. These dynamics now form the continental frame against which sub-outcome performance is assessed in Part D.

8. NATIONAL POLICY, FISCAL, AND SECTORAL SHIFTS

Over the five-year period under review, SA Tourism operated in a volatile and shifting national context marked by economic contraction, fiscal tightening, rising inequality, and growing pressure on the public sector to demonstrate value and trustworthiness. The country's recovery trajectory from COVID-19 was protracted and uneven, shaped by structural weaknesses that long predated the pandemic and was exacerbated by new crises of infrastructure, governance, and investor confidence. These dynamics directly shaped SA Tourism's strategic choices, delivery logic, stakeholder engagement model, and organisational focus areas.

Prolonged Economic Strain and Fiscal Reallocation

Between 2020 and 2025, South Africa's economic growth averaged below 2% per annum, well below the NDP's 2030 vision. Following the deep contraction of 2020, economic recovery was constrained by persistent load-shedding, declining public investment, a shrinking tax base, and eroding consumer confidence. These conditions led to a constrained fiscal envelope for all public entities, including SA Tourism. Over the Medium-Term Expenditure Framework (MTEF) period, the organisation's baseline budget was adjusted downward in real terms, necessitating reprioritisation, tighter programme integration, and a renewed focus on partnership-based delivery and co-funding platforms. Strategic messaging adapted to affordability, value-for-money, and domestic confidence as key themes.

A related national constraint was international airlift availability. From 2020 through to 2023, route reinstatement to and from South Africa lagged behind global peers due to aviation capacity shifts and demand volatility. These constraints inadvertently supported domestic substitution, with South Africans redirecting planned international trips toward local destinations. This redirection was bolstered by Sho't Left campaigns, local health protocols, remote work flexibility, and competitive pricing - collectively contributing to stronger than expected domestic trip and spend outcomes.

Pandemic Disruption and the Recovery Blueprint

The COVID-19 pandemic delivered an unprecedented blow to South Africa's tourism sector. International and domestic travel halted entirely, business and leisure events were cancelled, and sector-wide retrenchments eroded the visitor economy.

One further challenge that emerged in the latter part of the period was a systemic disruption to official arrivals data reporting, following the consolidation of border functions under the Border Management Agency (BMA) from 2023. This centralisation introduced delays and inconsistencies in the publication of visitor statistics, limiting the availability of near real-time arrivals data. SA Tourism was required to triangulate sources (e.g. Statistics SA, global data) to inform estimates and scenario planning. A formal disclaimer on BMA-linked data variances was introduced for internal reporting and will apply in future performance publications.

In response, the ERRP and the TSRP elevated tourism as a priority sector within the national recovery architecture, as part of a broader repositioning of tourism as a catalyst for services trade revitalisation and inclusive economic participation. These frameworks provided a strategic pivot, advocating for demand stimulation, inclusive diversification, destination safety, and digital modernisation. SA Tourism embedded these shifts into its revised APPs and strategic architecture, as codified in Annexure A amendments from 2021 onwards.

Persistent Unemployment and Structural Inequality

Despite signs of macro recovery, unemployment, particularly among the youth, remained entrenched, with

youth unemployment exceeding 60% in several years. SA Tourism aligned with the national developmental agenda by reframing tourism as a platform for inclusive growth. This period also saw a cultural shift in domestic travel behaviour, catalysed by social media visibility, celebrity-led leisure trends, and an emerging culture of January travel among young and middle-income South Africans. SA Tourism aligned its campaign logic to this shift through emotive storytelling and influencer-led Sho't Left narratives.

This led to the formal integration of WYPD into performance frameworks, increased VTSD activation, and strategic emphasis on township and SMME-driven tourism. These shifts were further amplified through platforms such as Sho't Left and the Business Events Programme initiatives.

While tourism job recovery formed a critical national outcome target, estimates varied significantly across sources (e.g. WTTC, Stats SA), and attribution to SA Tourism was limited. The organisation treated employment trends as macro indicators of sector health, rather than as directly attributable deliverables, and used them primarily for developmental framing rather than performance evaluation.

Energy and Infrastructure Failures

The intensification of load-shedding and logistical constraints (airlift, ports, roads) during this period disrupted the tourism value chain. Event planning, itinerary design, and service reliability were adversely affected.

These challenges undermined visitor confidence and were explicitly acknowledged in destination messaging, itinerary packaging, and hosted trade events. SA Tourism adjusted its operational frameworks to enhance resilience, working with partners to introduce adaptive scheduling, safety features, and digital check-in tools to mitigate infrastructure risks.

Safety, Perceptions, and Public Sentiment

Throughout the period, safety concerns, particularly gender-based violence and crime in general, featured prominently in both domestic and international tourism sentiment. At the same time, public confidence in government delivery and ethical conduct declined. These pressures elevated the importance of transparent communication, stakeholder trust building, and perception management.

SA Tourism responded by embedding reassurance themes into brand campaigns, scaling up hosted visitor support (e.g., welcome desks), and introducing perception tracking instruments, third-party trust equity surveys, hosted event perception tools, and the Corporate Reputation Index. Ministerial engagements and ExCo-led forums were used to formalise new delivery compacts.

STAKEHOLDER REPOSITIONING AND TRUST REBUILDING (2023 – 2025)

“We did not feel heard in 2020. By 2024, SA Tourism was calling us in quarterly to co-create campaigns. That shift mattered.”
- Provincial Partner, Stakeholder Survey (2024)

This reflection encapsulates a marked transition in SA Tourism’s organisational posture - from distant coordination to collaborative engagement. Early in the strategic cycle, stakeholder feedback often pointed to transactional relationships, limited consultation, and fragmented visibility of national tourism strategy.

By FY2023/24, driven by mounting governance scrutiny and a broader whole of state repositioning, SA Tourism had reframed stakeholder relations as a core strategic lever. Quarterly provincial and trade roundtables, co-branded campaign design, and ExCo-led

dialogue platforms became the new standard. These engagements helped rebuild trust, restore confidence in national leadership, and ensure alignment in delivery focus across all spheres of government.

The shift did not just improve public relations, it anchored SA Tourism's adaptive planning model and provided a more nuanced understanding of real-world delivery barriers.

Sectoral Reform and Long-Term Strategic Framing

The 2023 release of the TSMP provided a forward-looking policy trajectory that began to consolidate prior recovery interventions and emphasised sustainability, digital innovation, and inclusive growth. This policy trajectory supported SA Tourism's own corporate strategy shifts, including the restructuring of sub-outcomes, integrated demand-fulfilment logic, and the elevation of tourism intelligence systems. The TSMP served as both an anchor and amplifier for long-term repositioning, aligning with the organisation's 2025 – 2030 strategic planning baseline.

Implications for SA Tourism's Strategic Positioning

The national operating environment required South African Tourism to pivot from a volume-led, brand-first strategy to one that emphasised trust, inclusivity, resilience, and adaptive delivery. These shifts were not superficial, they reshaped the organisation's logic model, strategic outcomes, and delivery architecture.

While challenges remain - particularly around infrastructure, inequality, and governance - the five-year term demonstrated organisational agility and a willingness to respond with coherence to national imperatives. This alignment reinforces the legitimacy of SA Tourism's performance claims and its strategic foundations going into the next planning cycle.

9. ORGANISATIONAL CONTEXT - CONDITIONS OF OPERATION

SA Tourism's ability to implement its mandate over the 2020 - 2025 period was shaped not only by external forces, but also by persistent and, at times, internal organisational challenges. These internal realities did not in themselves determine performance - that assessment is reserved for Part D of this report - but they do provide the necessary background against which performance must be situated and understood. The purpose of this section is to present factually, the organisational shifts, reforms, and contextual changes within SA Tourism itself over the five-year period.

Leadership, Stability and Strategic Continuity

SA Tourism experienced significant instability between 2021 and 2024, which were governance compromised years, and were also marked by executive turnover, Board transitions, and a high vacancy rate. These challenges affected strategic continuity and stakeholder confidence - triggering both internal uncertainty and reputational risk in external stakeholder relationships - and prompting urgent stabilisation efforts. By 2024, leadership roles were re-established, with the Board reconstituted and a clearer governance rhythm reinstated.

Governance and Risk Management Reform

A regression in the audit outcome of FY23/24 and FY 2020/21 including recurrent audit findings triggered the adoption of a formalised governance reform programme. This included the Operation Clean Audit (OPCA) Programme, a structured programme to improve audit outcomes and strengthen internal control systems. While OPCA only began implementation in FY2022/23, it laid the groundwork for stronger audit preparedness, and improved accountability protocols.

The organisation piloted a Risk Maturity Assessment Framework, transitioning risk management from a fragmented, compliance-based process to a more strategic foresight tool. Though progress remained uneven, it signalled a shift toward institutionalised risk governance by the end of the review period.

The policy environment also became a focus, with the review and/or development of policies as part of improving the internal control environment.

Planning, Performance Information Management, Monitoring, Reporting and Evaluation Reform

From FY2021/22 onward, the Strategic Planning, Evaluation and Programme Management (SPEPM) business unit spearheaded a series of reforms to strengthen organisational planning, performance information management, monitoring, reporting and evaluation. This reform journey was underpinned by the development, approval and implementation of frameworks, which formalised planning, monitoring, reporting and evaluation cycles, criteria, and utilisation principles. In parallel, standardised indicator protocols, quarterly dashboard systems, and performance data assurance practices were designed and/or approved.

These efforts contributed directly to improved performance oversight, more timely course correction, and greater integration of evidence into planning and reporting cycles. Equally significant, organisational annual performance rates improved from 62% in FY2019/20 to a pre-audited 88% in FY2024/25.

Furthermore, organisational quarterly performance rates improved from an average of 41% in FY19/20 to 92% in FY24/25. These shifts repositioned planning, monitoring, reporting and evaluation from a compliance function to a strategic enabler of optimal performance and delivery integrity. For the first time in FY23/24 South African Tourism received a clean audit outcome on the Audit of Performance Objectives from the AGSA. In addition, satisfactory audit outcomes were received from Internal Audit on APPs from FY23/24 onward, QPRs from FY21/22 onward and APRs from FY2022/23 onward.

People, Culture and Organisational Reform

Internal survey results and employee performance reviews in FY2021/22 revealed low staff engagement and uneven morale, influenced by governance uncertainty and disrupted change management processes. In response, SA Tourism initiated a People and Culture Framework, with an emphasis on inclusive leadership development, WYPD equity in staffing, and organisational effectiveness reforms. These efforts

BUILDING A CULTURE OF ANTICIPATION (2024 – 2025)

“The audit regression for FY2023/24 did not just dent the books - it shook morale. But by late 2024, we are seeing ExCo taking the lead. Dashboards, early alerts, monthly governance huddles. We are getting ahead now, not chasing the problems.”

- Internal Governance Officer, QPR Interview, 2024

This testimony reflects a critical organisational inflection point. The recurrence of material audit findings during FY2023/24 prompted SA Tourism to move beyond compliance-as-correction and toward a culture of anticipatory governance. The introduction of governance huddles, and dashboard-based performance triggers, led by ExCo, enabled a shift in both mindset and mechanics.

These interventions were part of the Operation Clean Audit Programme, but their real impact was cultural. They restored staff confidence, reframed internal accountability, and signalled a deeper commitment to performance integrity.

were nested within a broader whole-of-state approach to tourism repositioning that elevated intergovernmental alignment, stakeholder dialogue, and collaborative delivery as organisational norms.

The FY2024/25 APP introduced an Organisational Effectiveness Plan, outlining organisation-wide reform targets focused on capacity alignment, leadership development, and internal accountability. Although initiated late in the five-year cycle, the plan signals a forward-looking organisational renewal process that will extend into the next strategic cycle.

Digital Migration and Intelligence Enablers

Digital modernisation emerged as a core enabler of organisational effectiveness. The development and implementation of an Integrated Digital and Analytics Framework, alongside the expanded use of digital dashboards, sought to reposition SA Tourism as a data-driven destination marketing organisation. These tools supported planning precision, stakeholder insight integration, and performance transparency. They were further embedded in the FY2023/24 and FY2024/25 APPs as foundational capabilities for future delivery, internal accountability, and stakeholder-facing transparency.

The external and internal dynamics outlined in this section provide the essential backdrop against which South African Tourism's delivery over the 2020 - 2025 period should be understood. While these factors did not determine outcomes in and of themselves, they materially shaped the environment in which strategic choices were made, campaigns were executed, and partnerships were forged. The performance evidence presented in Part D of this report is therefore read in full recognition of the operating conditions reflected here - conditions that simultaneously constrained, redirected, and in some cases, catalysed delivery innovation.

PART D: MEASURING OUR PERFORMANCE

Part D presents SA Tourism's organisational performance over the full 2020 - 2025 strategic cycle. It draws from a verified and triangulated evidence base, including the Strategic Plan, five APPs, audited annual reports (FY2020/21 - FY2023/24), the draft FY2024/25 AR, internal implementation programme evaluations and audits, global benchmarking data, and key organisational frameworks for performance information management.

The analysis is grounded in the structure and intent of the 2022 DPME Guidelines for End of Term Reporting. It builds directly on the organisational Theory of Change introduced in Part B and the strategic context set out in Part C, enabling a performance narrative that traces how organisational efforts translated into measurable outcomes and contributed to sector-level impact.

While the technical document in support of the End of Term Report provides the full performance datasets, documentary evidence, and structured assessments, this narrative section distils the organisational story of delivery, adaptation, and contribution over the five-year period. All assessments are aligned to the strategic intent, operating context, and delivery logic introduced in earlier sections of this report.

The performance assessment is presented in three interlinked components:

- 1) Impact Assessment - evaluating directional progress toward the developmental impact that SA Tourism aimed to contribute to.
- 2) Outcomes Performance Assessment - assessing delivery against the formally approved outcomes, indicators, and five-year targets set out in the Five-Year Strategic Plan and amended through the APPs and Annexure A updates.

- 3) Explanation of Achieved Performance - analysing the key drivers, constraints, and organisational dynamics that influenced performance across the four validated sub-outcomes, and incorporating evaluation findings and stakeholder insights.

Together, these components provide a comprehensive account of SA Tourism's contribution over the term. Strategic lessons and forward recommendations are addressed separately in Part E.

10. IMPACT ASSESSMENT

At the apex of SA Tourism's Five-Year Strategic Plan for 2020 - 2025 stood a singular developmental ambition, expressed in its impact statement:

Tourism in South Africa grows and increasingly contributes to GDP, job creation, inclusive economic participation, and is enjoyed by all South Africans.

This impact statement did not restate the organisation's vision. Instead, it articulated the broader transformation that South African Tourism sought to support through its mandate, acting as the national destination marketing organisation. Although not assigned specific indicators or a formal results chain in the Five-Year Strategic Plan, the statement served as the strategic apex for organisational delivery: shaping the Theory of Change, informing the design of outcomes and sub-outcomes, and guiding programme architecture over the five-year period.

Assessing progress toward this ambition requires more than a review of organisational performance or the achievement of outcome indicators. It demands a broader synthesis of sectoral trends, the directional contribution made by SA Tourism, and the contextual dynamics that shaped tourism's trajectory from 2020 to 2025. While SA Tourism does not control macroeconomic outcomes such as GDP growth, job creation, or structural transformation, it played a catalytic role - raising visibility, generating demand, enabling participation, and reinforcing public trust.

These contributions were realised through an integrated portfolio of interventions, designed to influence the developmental levers embedded in the Five-Year Strategic Plan's impact intent: inclusive growth, employment and livelihoods, economic participation, and public enjoyment and well-being.

Although these four dimensions were not formally articulated in the original Five-Year Strategic Plan, they have been analytically extracted for the purposes of this report. They reflect the composite intent of the impact statement and provide a structured lens through which SA Tourism's directional contribution can be assessed.

This assessment draws from a comprehensive and verified evidence base, including:

- 1) Official international and domestic tourism indicators from a range of secondary sources.
- 2) Organisational data and evaluations, including Annual Reports, Quarterly Reports, the Mid-Term Report, audit reports, and corporate strategy.
- 3) Studies and impact assessments, including those on Africa's Travel Indaba, Meetings Africa, and any other strategic events.
- 4) The organisational Theory of Change and delivery system – as introduced in Part B and contextualised in Part C.

Due to lags in national accounts data, figures for 2024 are based on the latest available estimates as of

May 2025 and should be interpreted as indicative.

In line with the 2022 DPME guidelines, this section does not claim attribution but rather examines multi-factor, macro-level progress toward the intended developmental impact. It locates SA Tourism's directional contribution within the broader ecosystem of public and private actors, consistent with its mandate as a national destination marketing organisation (see Part A).

The analysis that follows is structured by the four validated impact dimensions set out in the Five-Year Strategic Plan's intent framing. Each dimension is assessed through a narrative synthesis supported by directional data and evaluation findings - linking SA Tourism's organisational efforts to broader patterns of sectoral recovery, resilience, and transformation.

Dimension 1: Inclusive Economic Growth - Tourism as a Driver of National Recovery

South Africa's tourism sector entered the 2020 – 2025 strategic cycle with strong economic momentum. In 2019, tourism contributed approximately 6.4% directly and 9.2% in total (direct and indirect) to national GDP (WTTC). However, the COVID-19 pandemic caused a sudden and severe contraction. By 2020, direct tourism GDP had fallen to just 3.1%, and total contribution declined to 6.5%, halving the sector's economic footprint.

Recovery was gradual and uneven. By 2023, direct tourism GDP had risen modestly to 3.2%, with a projected 3.4% in 2024. Total contribution showed stronger momentum due to multiplier effects across the broader value chain - reaching 8.2% in 2023, and an estimated 8.8% in 2024 (WTTC, 2025). While encouraging, this trajectory remained below pre-pandemic levels, constrained by continued volatility in air access, visa processing, safety perceptions, infrastructure performance, and global economic uncertainty.

In this constrained and competitive context, SA Tourism played a catalytic role in reactivating demand, restoring visibility, and enabling spend. While it does not set macroeconomic policy, manage investment flows, or control enabling infrastructure, SA Tourism's delivery platform contributed meaningfully to national recovery through targeted brand campaigns, high-impact hosted platforms, and visitor fulfilment innovations.

Key contributions included:

- 1) Sustained international and domestic demand-generation campaigns - such as Welcome Back SA and Live Again - which re-engaged global markets while simultaneously activating domestic leisure segments with revised messaging on value, safety, and readiness.
- 2) The Sho't Left platform and regional affordability interventions, which unlocked latent demand by promoting budget-sensitive travel, stimulating local spend, and amplifying township and rural destinations through storytelling and geographic equity.
- 3) Africa's Travel Indaba and Meetings Africa, which served as high-value economic multipliers and strategic trade convenings. Independent economic impact assessments confirm that, over the 2022 - 2025 period, Africa's Travel Indaba generated R3.84 billion and Meetings Africa R1.09 billion in direct and induced GDP contribution for the South African economy.
- 4) Business events bidding by the SANCB, which secured 95 international bids between 2020 and 2025. These events, scheduled to take place between 2020 and 2029, are projected to generate over R1.5 billion in direct and induced economic impact and attract more than 38 000 delegates. This bidding success reinforced South Africa's competitiveness in the global MICE market and supported visibility, sector recovery, and economic inflow.

These interventions were aligned to national recovery policy frameworks, including the ERRP and the TSRP, both of which identified tourism as a labour-intensive, export-oriented lever for macroeconomic renewal. They also responded directly to the 2022 Mid-Term Report, which flagged South Africa's over-reliance on international arrivals and urged a strategic pivot to domestic and regional resilience, including smarter campaign targeting and measurable return on marketing investment.

While the full restoration of GDP contribution was ultimately shaped by external variables - including National Treasury stimulus, Department of Tourism policy enablement, private sector capital flows, airlift resumption, and municipal service reliability - SA Tourism's directional impact remains both clear and legitimate. Its delivery portfolio sustained the tourism brand, drove conversion, and held the line on sector visibility through the most volatile period in South Africa's democratic tourism history.

This dimension of impact is therefore directly aligned to:

- NDP Outcome 4: Decent employment through inclusive economic growth.
- MTSF Priority 2: Economic transformation and job creation.
- ERRP and TSRP directives: Tourism sector revitalisation and investment recovery.

In summary, while South Africa's tourism economy had not yet fully regained its 2019 footprint by 2025, SA Tourism's performance under this impact dimension helped reopen market channels, re-anchor sector credibility, and establish the foundations for long-term GDP resilience. Its interventions were not only reactive to crisis, but also strategic in laying groundwork for inclusive and sustained economic participation through tourism.

Dimension 2: Employment and Livelihoods: Tourism as an Inclusive Job Generator

Tourism is one of South Africa's most labour-absorbing sectors, sustaining diverse livelihoods across hospitality, events, retail, guiding, and transport. In 2019, the sector supported approximately 1.5 million jobs (WTTC). The COVID-19 pandemic caused a severe contraction, with total tourism-supported employment declining to around 900 000 in 2021.

Recovery was gradual but resilient. By 2023, tourism supported 1.46 million jobs, with an estimated rise to 1.68 million in 2024 (WTTC, 2025). Direct tourism employment - a subset focused on formal-sector roles - was recorded at approximately 630 700 in 2023 and projected to reach approximately 724 000 in 2024 (WTTC and Stats SA). These figures reflect a sector regaining ground but still below its pre-2019 footprint, with formal employment lagging due to structural constraints in capital, operations, and enabling services.

Employment estimates presented here are derived from WTTC and Stats SA and are used as proxy signals of sectoral health. SA Tourism's contribution to these figures is directional, not attributable, and was delivered through catalytic platforms, not employment programmes.

While SA Tourism does not directly measure or control employment outcomes, its mandate includes enabling labour-intensive platforms and stimulating demand across inclusive value chains. The organisation's strategic intent was to catalyse job creation through high-impact platforms, regional fulfilment, and inclusive enterprise activation.

Key directional contributions included:

- 1) Africa's Travel Indaba and Meetings Africa, which together supported a cumulative 12 018 jobs between 2022 and 2025, as validated by independent impact assessments (Indaba: 9 170 jobs, Meetings Africa: 2 848 jobs). These jobs spanned accommodation, logistics, event services, and local supplier networks.

- 2) Hosted buyer programmes and SMME onboarding, which enabled township and rural businesses - often high-employment generators - to access procurement pipelines, boosting local retention and workforce resilience.
- 3) Sho't Left and VTSD fulfilment campaigns, which stimulated domestic travel and indirectly supported employment across transport, hospitality, and guiding - areas with high labour elasticity.

The Mid-Term Report (2022) identified job fragility as a critical concern and recommended a pivot toward platforms with measurable inclusion outcomes. SA Tourism responded by embedding VTSD participation in its hosted events, localising platforms, and integrating transformation-linked job exposure mechanisms such as hidden gems and youth activations.

Importantly, SA Tourism's impact on employment was indirect but catalytic. Its platforms re-established market confidence, unlocked procurement flows, and allowed participating enterprises to retain or expand their workforce. This delivery mechanism aligned with the labour intensity focus of the TSRP and the emerging TSMP, which both positioned tourism as a tool for youth employment, spatial inclusion, and local regeneration.

These contributions are aligned with:

- NDP Outcome 4: Decent employment through inclusive economic growth.
- NDP Outcome 5: A skilled and capable workforce.
- MTSF Priority 2: Economic transformation and job creation.
- TSRP/TSMP: Employment intensity and township economy revitalisation.

In conclusion, while employment outcomes in the sector remain co-produced by policy, investment, and infrastructure enablers, SA Tourism's organisational focus on demand-led job activation delivered tangible support for labour recovery. Its interventions helped stabilise tourism-linked livelihoods, especially among township, rural, and youth beneficiaries, contributing to the sector's resilience and future employment potential.

Dimension 3: Inclusive Economic Participation – Tourism as a Platform for Transformation

Transformation has long stood as a policy cornerstone of South Africa's tourism development model. The Five-Year Strategic Plan reaffirmed this by positioning the sector as a lever for inclusive economic participation - enabling small enterprises, township and rural tourism operators, and women, youth and persons with disabilities to benefit from the visitor economy. While historically uneven in execution, the five-year period under review marked a shift toward deeper and more systemic inclusion, particularly in the wake of the COVID-19 crisis.

The national tourism sector, severely disrupted by the pandemic, required more than just recovery - it needed to rebuild in ways that broadened opportunity, diversified participation, and targeted redress. The ERRP, the TSRP, and the later TSMP all reinforced this imperative, framing transformation not only as an ethical necessity but as a strategic condition for sustained growth.

Within this sector-wide context, inclusive participation gradually matured from an aspiration into an operational commitment. Industry platforms increasingly integrated SMMEs into procurement chains, exhibition zones, and hosted content. Provincial tourism authorities began localising their visitor strategies to uplift previously excluded areas. Policy and regulation strengthened the call for inclusive spatial equity through the DDM and Broad-Based Black Economic Empowerment (B-BBEE) frameworks.

SA Tourism contributed directionally to this shift by evolving its approach from occasional exposure to structured enterprise integration. While it did not define sector transformation indicators or monitor system-wide participation rates, its delivery platforms reflected and reinforced key aspects of the national transformation agenda. Notable contributions included:

- 1) Institutionalisation of inclusive procurement and participation - SA Tourism embedded transformation into the design of its flagship hosted platforms, ensuring that township, rural, and WYPD enterprises were not only visible, but actively engaged as exhibitors, service providers, and co-creators of tourism content.
- 2) Platform-based inclusion mechanisms - Dedicated inclusion zones such as Hidden Gems at Africa's Travel Indaba and Meetings Africa were scaled and professionalised, offering onboarding support, commercial lead facilitation, and brand visibility. These spaces began to transition from symbolic showcases to commercial value pathways.
- 3) Strategic localisation of campaigns - The Sho't Left platform elevated township and rural tourism products through affordable travel packages and equity-focused storytelling. From FY2023/24, campaign briefs explicitly mandated diverse regional representation and enterprise inclusion, supporting greater national resonance.
- 4) Youth and WYPD pathways - Though uneven across the organisation, youth-targeted campaigns (such as Travel Wise Mzansi) and supplier development initiatives (including enterprise learnerships and hosted mentorships) created new entry points for WYPD and youth-owned enterprises into the tourism value chain.

FROM VISIBILITY TO VALUE: HIDDEN GEMS AND THE DEAL PIPELINE

"We left Indaba with actual leads - and we closed deals. It was not just a stall anymore. It was a business gateway."

- SMME Delegate, Hidden Gems Post-Event Survey, 2024

This reflection captures the mindset shift at the heart of SA Tourism's evolving inclusion model: from symbolic participation to economic traction. By the end of the strategic cycle, the Hidden Gems platform had become more than an exhibition space - it was a credibility mechanism. For many township and rural enterprises, it marked their first entry into a structured commercial ecosystem with curated buyer access, branded presence, and technical support.

What distinguished the 2023 – 2025 experience was not just the scale, but the sense of legitimacy. SMMEs reported feeling seen, equipped, and able to compete - not as charity cases, but as contributors to national value chains. The platform's evolution became a symbol of SA Tourism's broader pivot: toward equity with consequence, access with intent, and inclusion as economic strategy rather than quota.

These contributions responded to systemic gaps identified in the 2022 Mid-Term Report, which highlighted three persistent risks: 1) shallow commercial outcomes from inclusion efforts, 2) inconsistent organisational internalisation of transformation mandates, and 3) lack of tracking of long-term participation. SA Tourism's post-Mid-Term Report adaptations - such as integrating transformation key performance indicators (KPI) into platform strategies and revising content briefs - indicated growing maturity and responsiveness.

Nonetheless, sector-wide transformation remains constrained by entrenched external factors: the fragility of township tourism ecosystems, undercapitalised enterprises, fragmented support programmes, infrastructure deficits, and localised policy incoherence. These cannot be resolved by SA Tourism alone.

The organisation's role has been catalytic, and focused on shifting the narrative, enabling access, and demonstrating what inclusive tourism could look like in practice.

A parallel shift toward sustainable tourism foundations was initiated in 2023 - 2025 through environmentally conscious brand messaging, nature-based experience curation, and strategic positioning aligned to the emerging sustainability focus.

This impact dimension aligns with:

- NDP Outcome 4: Decent employment through inclusive economic growth.
- MTSF Priority 1: A capable, ethical and developmental state.
- MTSF Priority 2: Economic transformation and job creation.
- TSRP and DDM goals: Inclusive spatial equity and enterprise participation.
- Tourism BEE Charter: Broadening access to tourism ownership and opportunity.

In summary, while full sector transformation remains a long-term endeavour, the 2020 – 2025 period signalled a clear directional shift. Inclusive economic participation became more embedded in platforms, procurement, and campaign content. SA Tourism, while not the sole driver of this change, played a visible and constructive role in including transformation as a central pillar of sector recovery and strategic growth.

EMPOWERING YOUTH THROUGH TRAVEL WISE MZANSI (2023)

"We were not just part of the campaign. We shaped it. We trained other youth. We got to own the narrative of safe and smart travel for young South Africans."

- Youth Safety Ambassador, Travel Wise Mzansi, 2023

This initiative, launched under the broader Sho't Left umbrella in 2023, piloted a new approach to safety and social inclusion in domestic tourism. Rather than simply issuing safety advisories, SA Tourism partnered with local youth organisations to co-create content, lead peer training, and deliver hyperlocal safety awareness activations in high-traffic leisure areas.

The campaign created over 200 temporary youth engagement roles, focused on travel literacy, digital security, and public safety. It contributed to more than a marketing message; it forged a sense of ownership and civic confidence among participating youth. For SA Tourism, this marked a shift from top-down messaging to participatory engagement - with inclusion and public well-being at the centre.

Dimension 4: Public Enjoyment and Well-being – Tourism as a Public Good

While tourism's economic value is well recognised, its social contribution - enhancing public well-being, fostering national pride, and broadening access to leisure experiences - is equally critical. Following the trauma of the COVID-19 pandemic, domestic tourism also served a psychosocial function - reconnecting communities, restoring confidence, and affirming belonging. SA Tourism's public campaigns, regional events, and inclusive messaging became part of South Africa's emotional recovery infrastructure.

The Five-Year Strategic Plan embedded this ambition in its impact statement, asserting that tourism should be "enjoyed by all South Africans." Though not assigned formal indicators, this dimension has been analytically reconstructed to assess how tourism contributed to public benefit during the review period.

The post-COVID-19 recovery saw a marked resurgence in domestic travel volumes. Domestic holiday trips rose from 7.1 million in 2019, according to Statistics South Africa, to nearly 9.9 million in FY2022/23, as recorded by SA Tourism's Domestic Tourism Performance Tracker. By Quarter 1 of FY2023/24, SA Tourism reported overnight domestic trips across all purposes had reached 18.8 million, a 23.4% year-on-year increase, signalling a full recovery of latent demand. Full-year estimates for FY2023/24 (12.6 million) and projections for FY2024/25 (11.5 million) confirmed that domestic travel remained well above pre-

pandemic levels.

However, this growth did not translate into improved geographic spread. SA Tourism's validated performance indicators confirm that the share of domestic trips to provinces beyond the top two fell from 8.0% in FY2019/20 to just 3.3% by FY2024/25. Despite VTSD campaign efforts and Sho't Left activations, entrenched travel patterns persisted. Barriers such as affordability, infrastructure, and safety concerns continued to constrain equitable regional access.

These results suggest that while more people travelled, most continued to visit major hubs, with structural constraints - such as affordability, transport access, safety perceptions, and destination readiness - limiting equitable access to lesser-known regions.

Within this constrained environment, SA Tourism's contribution was directional and narrative focused. It sought to shape perceptions, amplify access, and reframe tourism as a civic right, not a luxury. Key organisational interventions included:

- 1) Sho't left Campaigns - Revamped from 2021 onward, these campaigns embedded affordability, equity, and spatial inclusion principles into brand and messaging. Township products, regional experiences, and budget itineraries were spotlighted to expand the cultural reach and accessibility of domestic tourism.
- 2) Travel Wise Mzansi (2023) - Piloted under the Sho't Left umbrella, this campaign used youth-led peer education to deliver safety awareness activations in tourism hotspots. Over 200 temporary youth roles were created, marking a shift from broadcast messaging to participatory civic engagement that empowered young South Africans as safety ambassadors.
- 3) Experience quality and sentiment tracking – The Net Promoter Score (NPS) tracking recorded consistent satisfaction rates of approximately 88% to 92% between 2022 and 2024 among hosted and graded platform visitors. While not nationally representative, these results offered directional insight into hosted visitor sentiment and were used to improve campaign content and delivery.
- 4) Public-facing platform elements - Events like Africa's Travel Indaba and Meetings Africa integrated public showcases and provincial content, elevating tourism's role as a national asset. This included community activations, storytelling zones, and cultural showcases designed to signal inclusivity.
- 5) Inclusive narrative and brand positioning - From FY2023/24, SA Tourism began embedding inclusive and diverse imagery and messaging that reflected the broader South African society into its campaigns. This helped reposition tourism as a shared national experience.

BUILDING TRUST FROM THE GROUND UP (2023 – 2024)

"I am satisfied with the level of engagement between SA Tourism and the Department. They are always willing and prompt in sharing information necessary for taking certain decisions."

- National Government stakeholder, 2024

While external audit findings and governance challenges dominated 2023 headlines, parallel efforts to rebuild organisational trust gained quiet traction behind the scenes. Improved responsiveness, stakeholder tracking, and ExCo participation in cross-government planning processes helped reframe perceptions of SA Tourism as a credible, values-aligned delivery partner.

This quote - part of a broader set of testimonials collected during ExCo-led stakeholder engagements in 2024 - reflects the incremental gains made in restoring confidence and organisational standing. It supports the broader narrative that SA Tourism's value lies not only in brand campaigns or visitor numbers, but also in how it engages the system in which it operates.

The 2022 Mid-Term Report flagged affordability, regional concentration, and safety perceptions as key risks to public enjoyment. It also challenged SA Tourism to lead in positioning tourism as a public good, a

challenge the organisation met by adapting its messaging, delivery, and stakeholder engagement frameworks accordingly.

While SA Tourism does not control structural enablers such as public safety, transport infrastructure, or municipal service delivery, it plays a vital role in generating trust, interest, and perceived accessibility. By doing so, it contributes to the enabling conditions for more equitable participation and public benefit.

This dimension of impact aligns with:

- NDP Outcome 15: Social cohesion and nation-building.
- MTSF Priority 5: Spatial integration, human settlements and local government.
- TSRP objectives: Destination trust, domestic travel resilience, and public value.
- DDM logic: Localised access and spatial equity.

In summary, SA Tourism made a distinctive contribution to repositioning tourism as a public good. Through inclusive campaigns, participatory youth platforms, and responsive event and content design, it helped deepen public engagement and broaden the emotional and civic ownership of tourism assets. While geographic equity targets were not achieved, the directional shift in narrative and visibility is both measurable and meaningful, providing a strong basis for future spatial and social tourism strategies. Reputational surveys and perception tracking instruments, including the Corporate Brand Index introduced from 2023, confirmed progressive improvements in stakeholder trust and destination brand equity, reinforcing tourism's public legitimacy.

Taken together, these four impact dimensions reflect the broader developmental ambition that framed SA Tourism's strategic intent over the 2020 - 2025 period. While macro-level shifts in GDP, employment, transformation, and public sentiment cannot be directly attributed to the organisation, the directional evidence confirms a clear and catalytic contribution through its platforms, partnerships, and programme delivery. This contribution was consistent with the organisation's mandate, its Theory of Change, and the adaptive logic outlined in Part B.

Having assessed these directional contributions at the sectoral level, this report now turns to assessing SA Tourism's formal organisational performance. The next section reflects on delivery against the two approved strategic outcomes, associated outcome indicators, and five-year targets, drawing on validated evidence to assess organisational effectiveness within the results framework.

11. OUTCOMES PERFORMANCE ASSESSMENT

This section presents a validated assessment of South African Tourism's organisational performance against the two strategic outcomes adopted in the 2020 – 2025 Strategic Plan. These outcomes were pursued over the full five-year planning cycle and are the primary measures of the organisation's contribution to sectoral development and organisational governance.

The performance assessment follows the requirements of the 2022 DPME Guidelines for End of Term Reports, which mandate that departments and entities report substantively on their original strategic outcomes, while reflecting any formal amendments approved during the term. These amendments - covering changes to indicator definitions, baseline adjustments, revised targets, and phased refinements - were captured in Annexure A of the APPs from FY2021/22 to FY2024/25. All such changes have been systematically applied in this report to ensure traceability, accuracy, and full compliance with national performance reporting standards.

Performance assessments and ratings are also guided by SA Tourism's internal frameworks guiding performance information management, monitoring, reporting and evaluation, all of which define attribution logic, rating consistency, and data credibility standards.

The two outcomes assessed are:

- 1) Increase the tourism sector's contribution to inclusive economic growth; and**
- 2) Achieve good corporate and cooperative governance.**

Each outcome was supported by a set of quantitative indicators formally recorded in the Five-Year Strategic Plan and its amendments reflected in APPs. Performance against these indicators was tracked using the audited annual reports for FY2020/21 to FY2023/24, the pre-audited FY2024/25 Annual Performance Report, and corroborated by internal evidence sources, including AGSA Management Reports, Internal Audit Reports, tourism performance reviews, and implementation programme evaluations, studies, and assessments.

The outcome indicator matrix that follows reflects:

- 1) All original indicators and five-year targets as published in the Five-Year Strategic Plan.
- 2) All formally adopted amendments from Annexure A of each APP over the five-year period.
- 3) Verified annual performance results from FY2020/21 to FY2023/24, using the latest available audited data, and the pre-audited FY2024/25 Annual Performance Report.
- 4) A formal rating of whether each five-year target was achieved or not achieved.
- 5) Commentary explaining performance trends, delivery variations, and strategic insights.

This outcome-level assessment constitutes the quantitative core of SA Tourism's performance narrative. It directly supports the impact analysis presented in Section D10 and provides the foundation for the organisational performance explanations in Section D12, where drivers, constraints, and enabling conditions are examined in depth.

Taken together, this section enables a rigorous, transparent, and evidence-based understanding of SA Tourism's strategic delivery over the 2020 - 2025 period, anchored in formally approved plans, independently verified results, and a coherent results logic.

Outcome Indicator Performance Matrix (2020 – 2025)

Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)	Actual Achievement as at 31 March 2025	Reason for Deviation	Corrective Action to be Taken in the Next Planning Cycle
1. Increase the tourism sector's contribution to inclusive economic growth	Progress towards doubling international tourist arrivals to 21 million by 2030 (State of the Nation Address (SONA) 2019)	10.3 million	10.3 million	9 124 000	<p>The final performance result reached 88.3% of the revised five-year target, reflecting a substantial recovery but also a shortfall.</p> <p>SA Tourism's brand campaigns, trade platforms and regional reactivation helped rebound arrivals more than tenfold from the COVID low of 760 080 in FY2020/21. However, even the lowered target was not fully met, due to persistent structural constraints - including air access limits, visa inefficiencies, geopolitical uncertainty, and safety concerns - that suppressed full market recovery.</p>	<p>Future strategy should integrate a cross-actor facilitation plan addressing airlift, visa policy, and destination assurance.</p> <p>Target-setting should include risk-adjusted trajectories with scenario planning and a revised baseline logic for recovery curves.</p>
	Rand value of international tourist spend	R90.7 billion	R86.7 billion	R92.8 billion	<p>International tourist spend rebounded sharply from a low of R7.4 billion in FY2020/21 to R92.8 billion by the end of FY2024/25.</p> <p>This recovery trajectory reflects strong resilience in core source markets, enabled by SA Tourism's demand reactivation in high-value geographies. Despite volatility in global travel and inflationary pressures, average per-trip spend remained stable.</p>	n/a
	Number of domestic holiday trips	7.1 million	10.8 million	11.5 million	<p>A clear upward trajectory was observed over the five-year period, beginning with a suppressed base in FY2020/21.</p> <p>Trip volumes rebounded significantly post-COVID-19, peaking in FY2023/24 (12.6 million) before easing slightly to 11.5 million in FY2024/25 - both years exceeding the official target. This performance reflects the</p>	n/a

Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)	Actual Achievement as at 31 March 2025	Reason for Deviation	Corrective Action to be Taken in the Next Planning Cycle
					effectiveness of Sho't Left and other domestic campaigns, and renewed consumer confidence in local travel. The indicator provides strong evidence of resilient domestic demand and strategic return on marketing investment.	
	Value of domestic holiday direct spend	R17.3 billion	R33.5 billion	R61.0 billion	<p>This indicator demonstrated the strongest and most consistent overperformance across all five years. From a base of R12.1 billion in FY2020/21, domestic holiday spend surged past expectations, prompting formal upward revision of the five-year target in the FY2023/24 APP.</p> <p>Final reported performance of R61.0 billion in FY2024/25 represents a fivefold increase since the pandemic low and reflects higher per-trip spend, effective experience packaging, and the enduring impact of SA Tourism's affordability and inclusion campaigns. The result signals durable value-driven domestic demand and successful spatial circulation outcomes.</p>	n/a
	Geographic spread of international tourist arrivals	20.0%	13.9%	9.1%	<p>The indicator showed steady decline over the five-year period, from 13.8% to 9.1%, despite strategic emphasis on regional dispersion. Persistent concentration in Gauteng and Western Cape reflects structural constraints including limited airlift to secondary cities, negative safety perceptions, and inadequate tourism infrastructure in under-represented regions.</p> <p>While SA Tourism prioritised destination diversification through campaigns and messaging, these efforts were insufficient to shift entrenched patterns. Risk of regional exclusion remains a critical challenge for inclusive sector</p>	This limitation suggests that future indicator design should consider both volume and value dimensions of geographic inclusion.

Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)	Actual Achievement as at 31 March 2025	Reason for Deviation	Corrective Action to be Taken in the Next Planning Cycle
					growth. The current formulation of this indicator as a percentage share of arrivals to non-top two provinces may insufficiently capture true spatial equity or inclusive benefit. Its narrow framing masks volumetric shifts, regional disparities, and fails to reflect spend or economic value added in under-served areas.	
	Geographic spread of domestic tourist arrivals	8.0%	8.0%	3.3%	<p>Despite inclusion in every APP and alignment with VTSD priorities, the geographic dispersion of domestic tourism eroded over the review period. The indicator dropped sharply from a baseline of 8.0% to just 1.8% by FY2022/23 and marginally recovered to 3.3% in the final two years. High concentration in a few destinations persisted. Constraints include affordability, access, infrastructure disparities, and safety concerns in under-served areas.</p> <p>While the Sho't Left and domestic activation campaigns raised overall trip numbers, they did not alter spatial travel patterns. This outcome highlights a key strategic blind spot in VTSD implementation. The current formulation of this indicator as a percentage share of arrivals to non-top two provinces may insufficiently capture true spatial equity or inclusive benefit. Its narrow framing masks volumetric shifts, regional disparities, and fails to reflect spend or economic value added in under-served areas.</p>	This limitation suggests that future indicator design should consider both volume and value dimensions of geographic inclusion.
	Seasonality of international tourist arrivals	1.3%	1.0%	1.0%	This indicator demonstrated exceptional stability across the measurable period, consistently recording 1.0% seasonality variance from FY2021/22 through FY2024/25.	n/a

Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)	Actual Achievement as at 31 March 2025	Reason for Deviation	Corrective Action to be Taken in the Next Planning Cycle
					It reflects improved intra-year distribution of arrivals, aligned with SA Tourism's efforts to smooth tourism flows and avoid peak congestion.	
	Total number of international business events hosted (cumulative)	230	111	284	<p>This indicator reflects a strong post-COVID-19 rebound in business events hosting, led by SANCB and SA Tourism's reactivation of the MICE sector. After two disrupted years, performance accelerated from FY2022/23. Meetings Africa, bid support, and international partnerships helped exceed the cumulative target.</p> <p>Future performance will depend on securing sustained bid wins and expanding continental collaboration. The 2023 - 2024 Business Events Brand Equity Reports confirmed rising hosted buyer confidence, brand memorability, and platform value perception. Meetings Africa and Africa's Travel Indaba both showed recovery in brand association and relevance among trade stakeholders, supporting platform ROI narratives.</p>	n/a
	Number of SMME businesses supported	182	1 096 (cumulative 2020/21- 2024/25)	2 343	<p>Organisational focus on transformation and enterprise inclusion intensified from FY2021/22 onward. SMME support was embedded in platform delivery (Africa's Travel Indaba, Meetings Africa), VTSD hosting, and the BQV Programme.</p> <p>From FY2023/24, WYPD inclusion and supplier diversity gained prominence. The surge in FY2024/25 reflects the reclassification of supported businesses.</p>	n/a

Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)	Actual Achievement as at 31 March 2025	Reason for Deviation	Corrective Action to be Taken in the Next Planning Cycle
2. Achieve good and corporate cooperative governance	External audit outcomes	Unqualified audit outcome	Unqualified audit outcome maintained	Target was met in two of the four completed years. The final year result is pending and will determine the five-year compliance pattern.	SA Tourism achieved unqualified audit outcomes in FY2021/22 and FY2022/23, reflecting progress in financial controls and compliance. However, the qualified opinions received in FY2020/21 and FY2023/24 - as documented in AGSA Management Reports - flagged weaknesses in internal controls. The FY2024/25 audit result, due post-reporting, is critical to completing the five-year governance picture and assessing trajectory consistency.	The Operation Clean Audit Programme was initiated to address the audit regression and facilitate an improvement within the internal control environment. In addition, more robust mechanisms are currently being affected to improve audit outcomes, including implementing a Combined Assurance Framework and mitigating root causes of all audit findings. The policy environment has already received a dedicated focus with the review and/or development of the organisation's policy universe.
	South African Tourism Corporate Brand Index	Baseline of 68.24 determined in FY2021/22	74.24 South African Tourism Corporate Brand Index	66.9 South African Tourism Corporate Brand Index	Early gains in brand trust and organisational credibility were recorded in FY2022/23, with the index peaking at 74.7 following post-COVID-19 recovery efforts and strengthened stakeholder engagement. However, despite year on year efforts to improve the corporate reputation index, reputational risks materialised in FY2023/24 and FY2024/25, triggered by audit setbacks, governance challenges, and media scrutiny. The Index dropped to 66.9 in FY2024/25, signalling erosion of public and partner confidence.	Sustained reputation rebuilding will require targeted interventions in ethics, transparency, and delivery credibility, particularly in the new strategic cycle. In addition, a stakeholder remedial action plan is currently being finalised for implementation to improve the Corporate Brand Index.

Taken as a whole, the Outcome Indicator Performance Matrix confirms a nuanced but directionally credible performance narrative. Over the 2020 - 2025 cycle, SA Tourism achieved six of the 11 (55%) of its formally amended outcome targets. Significantly, targets pertaining to international tourist spend recovery, domestic tourism, SMME inclusion, and hosting international business events were exceeded. These achievements underscore the organisation's strategic responsiveness and operational resilience in the face of post-pandemic volatility and delivery constraints.

However, several persistent challenges - particularly in spatial equity, governance consistency, and stakeholder trust - limited full target attainment and highlight enduring organisational and systemic risks. These results resist simplistic classification as either 'success' or 'failure,' rather, they reflect the adaptive realities of delivery within a maturing results-based planning system.

To deepen understanding of how these outcome-level results supported broader sectoral change, the table below maps each outcome indicator to the four validated impact dimensions. It connects organisational results to SA Tourism's strategic intent, as articulated in Part B, and the developmental impact narrative presented in Part D10.

This analysis also sets the foundation for the next section of the report, which explores the internal and external drivers, constraints, and delivery dynamics that shaped these results over the five-year period.

Linking Outcomes to Impact: Contribution of Outcome Indicators to Sectoral Change (2020–2025)

Outcome Indicator	Primary Impact Dimensions	Directional Contribution	Insights from Five-Year Performance
1. Progress towards doubling international tourist arrivals to 21 million by 2030 (State of the Nation Address (SONA) 2019)	1. Inclusive Economic Growth 4. Public Enjoyment and Well-being	Drives export revenue, foreign exchange earnings, and enhances destination image	Recovered from 760 080 to 9 124 000 million, showing strong rebound. Progress was shaped by sustained campaigns but constrained by airlift, visa processing, and safety perceptions.
2. Rand value of international tourist spend	1. Inclusive Economic Growth	Direct GDP contribution and value chain stimulation	Final spend of R92.8 billion exceeded the revised target. Reflects resilient demand in high-value markets despite global volatility.
3. Number of domestic holiday trips	1. Inclusive Economic Growth 4. Public Enjoyment and Well-being	Stimulates regional demand and inclusive leisure access	Increased from 7.1 million to 11.5 million trips. Sho't Left and affordability campaigns proved pivotal in reactivating domestic confidence.
4. Value of domestic holiday direct spend	1. Inclusive Economic Growth	Multiplies local economic impact, especially in VTSDs	Surged from 17.3 billion to R61.0 billion, more than tripling the original projection. Indicates high per-trip spend and campaign ROI.
5. Geographic spread of international tourist arrivals	3. Inclusive Economic Participation	Extends benefits beyond major hubs	Declined significantly from 20.0% to 9.1%. Campaigns were insufficient to reverse structural centralisation. Highlights persistent regional exclusion.
6. Geographic spread of domestic tourist arrivals	3. Inclusive Economic Participation	Promotes equitable spatial access and	Dropped sharply from 8.0% to 3.3%. High trip volumes did not translate

Outcome Indicator	Primary Impact Dimensions	Directional Contribution	Insights from Five-Year Performance
		regional circulation	into improved provincial spread. Structural barriers remained.
7. Seasonality of tourist arrivals	2. Employment and Livelihoods 3. Inclusive Economic Participation	Smooths demand cycles, stabilises workforce and operations	Dropped from 1.3% but consistently met the 1.0% target. Helped reduce peaks and troughs, though spatial seasonality persisted in secondary regions.
8. Total number of international business events hosted (cumulative)	1. Inclusive Economic Growth 2. Employment and Livelihoods	Catalyses high-value visitation, MICE sector jobs, and SMME participation	284 events hosted versus the target of 111 and baseline of 230. SANCB reactivated the MICE sector with Meetings Africa and strategic bid support.
9. Number of SMME businesses supported	2. Employment and Livelihoods 3. Inclusive Economic Participation	Drives enterprise inclusion and transformation	Support to 2 343 SMMEs, exceeding the 1 096 target and baseline of 182. Platform localisation and VTSD integration expanded reach significantly.
10. External audit outcomes	4. Public Enjoyment and Well-being	Signals organisational integrity and delivery credibility	Two unqualified outcomes achieved. Regression in FY2020/21 and FY2023/24 reflected supply chain management (SCM) weaknesses. Audit outcomes trajectory remains a reputational lever.
11. South African Tourism Corporate Brand Index	4. Public Enjoyment and Well-being	Proxy for stakeholder trust and transparency	Peaked at 74.7, then declined to 66.9. Erosion tied to governance risks and media scrutiny. Brand rehabilitation is critical.

This outcome-to-impact crosswalk affirms that SA Tourism’s organisational results, while uneven in some areas, made measurable directional contributions to the sector’s recovery, resilience, and transformation agenda. The next section of this report builds on this foundation by examining the underlying factors that enabled or constrained delivery and offers a deeper explanation of performance variation over the five-year period.

12. EXPLANATION OF ACHIEVED PERFORMANCE OVER THE FIVE-YEAR PERIOD

The preceding section presented a validated assessment of SA Tourism’s organisational performance against its two strategic outcomes and their formally adopted indicators and five-year targets. While that offered a quantitative picture of what was achieved, exceeded, or fell short, it does not itself explain what effort was deployed towards realising these results. Understanding the underlying dynamics of performance requires a deeper analysis of how the organisation delivered the choices made, the capacities mobilised, and the conditions encountered over time.

This section provides that explanatory bridge. It traces the causal drivers, constraints, and learning moments that shaped the organisation’s delivery trajectory between 2020 and 2025. In line with the 2022 DPME Guidelines, it moves beyond indicator tracking to examine the organisational, operational, and contextual factors that influenced performance, and what these reveal about strategic intent, adaptive capacity, and organisational maturity.

The analysis is structured around the four sub-outcomes that collectively represent SA Tourism's delivery logic during the review period. These sub-outcomes were not explicitly articulated in the Five-Year Strategic Plan but evolved over time through successive APPs and internal reviews. By FY2023/24, they formed a coherent results framework aligning strategy, output delivery, and performance expectations. They are:

Outcome 1: Increase the tourism sector's contribution to inclusive economic growth

- 1.1. Demand Creation: Generating awareness, interest, and preference for South Africa as a tourism destination.
- 1.2. Demand Fulfilment: Converting travel intent into realised visitation through accessibility, experience quality, and equitable distribution.

Outcome 2: Achieve good corporate and cooperative governance

- 2.1. Relevant Tourism Intelligence and Digital Ecosystem: Delivering reliable data, analytics, and intelligence, and strengthening digital architecture, platforms, and systems.
- 2.2. Improved Corporate Reputation: Reinforcing public trust through ethical conduct, governance maturity, audit integrity, and stakeholder alignment.

Each of the four sub-outcome sections begins with a structured five-year review of output delivery, clustered by programme logic and aligned to the Annual Performance Plans. This is followed by an explanatory analysis that identifies key drivers of performance, systemic constraints, stakeholder insights, and organisational lessons.

The assessment draws directly on quarterly dashboards, internal reviews, formal evaluation instruments and planning, monitoring, reporting and evaluation frameworks. These frameworks defined how SA Tourism assessed attribution, validated performance data, and systematised feedback loops into strategy and planning.

Together, these explanatory assessments provide a richer understanding of how SA Tourism's organisational performance shaped, and was shaped by, delivery conditions over the strategic period. They also inform the learning and recommendations in Part E and offer critical insights for the next strategic cycle.

12.1. SUB-OUTCOME 1.1: DEMAND CREATION

This sub-outcome focuses on stimulating interest, visibility, and preference for South Africa as a competitive tourism destination. It underpins Strategic Outcome 1 by driving awareness and demand through brand positioning, international and domestic campaigns, trade engagement platforms, digital content innovation, and equity-aligned messaging strategies.

As detailed in Part B, Demand Creation is the first of four sub-outcomes within SA Tourism's organisational delivery logic, forming the entry point in the outcome-to-impact results chain. While not explicitly articulated in the original Five-Year Strategic Plan, this sub-outcome evolved through successive APPs into a coherent and evidence-based output cluster, particularly after the 2022 MTR. The MTR prompted a shift from legacy brand metrics and numeric campaign counts toward integrated localisation, digital-first storytelling, and brand equity measurement tools.

Delivery was primarily led by:

- Programme 3: Leisure Tourism Marketing, which focused on global and domestic consumer campaigns, activated in-market platforms, and drove the repositioning and strategic architecture of South Africa's tourism brand.
- Programme 4: Business Events, which advanced the country's MICE value proposition and led national and global engagement platforms, including hosted buyer facilitation and trade partner activation.
- Programme 2: Business Enablement, which enabled delivery through market intelligence systems, digital asset management platforms, and audience segmentation tools.

The sub-outcome represents a critical test of SA Tourism's ability to deliver on its brand mandate, catalyse recovery after COVID-19, and stimulate demand from both traditional and emerging markets. Its delivery logic was formally structured into three integrated output clusters:

- 1) Strategic messaging and brand architecture – focused on unified storytelling, brand equity measurement, influencer strategies, public relations systems, and content coherence.
- 2) Flagship platforms and partner ecosystems – focused on trade event delivery, platform innovation, equity inclusion, and brand-aligned strategic partnerships; and
- 3) Tactical demand activation and market engagement – encompassing demand-side campaigns, lead generation platforms, regional activations, and economic impact communications.

These output clusters structure the assessment that follows and reflect the organisational shift from fragmented campaign delivery to a more strategic, platform-led approach. This performance story unfolds against the backdrop of volatile global recovery, budget constraints, shifting consumer preferences, and intensified destination competition.

The following sections present a layered narrative of what SA Tourism achieved under this sub-outcome, what constrained progress, and how the organisation adapted its approach to deliver measurable brand value, regional equity, and market reactivation over the five-year period.

12.1.1. OUTPUT CLUSTER 1: STRATEGIC MESSAGING AND BRAND ARCHITECTURE

This cluster of planned performance interventions focused on repositioning South Africa's tourism identity through coherent messaging, segmented campaign delivery, and consistent brand architecture across global and domestic markets. It was central to SA Tourism's effort to recover demand, rebuild traveller confidence, and protect the country's reputational asset in a volatile environment. Delivery over the five years reveals a progressive shift from survival messaging toward differentiated, insight-led positioning, anchored by the "Live Again" brand narrative and enabled by a new generation of market-segmented campaigns, digital content formats, and public relations tools.

The five-year term opened in crisis, with no international campaign delivery possible in FY2020/21 and FY2021/22 due to pandemic-related shutdowns, and budget suspensions. However, this disruption catalysed a long-overdue review of SA Tourism's strategic messaging approach. By FY2022/23, the organisation had adopted a deliberate repositioning strategy through the "Live Again" Campaign, which functioned not only as a creative theme, but as a unifying narrative framework across consumer-facing and trade platforms. This shift marked a fundamental change: from fragmented campaign deployment to integrated storytelling linked to recovery, reconnection, and reimagined travel experiences.

The “Live Again” positioning was embedded in both leisure and business tourism narratives. On the global stage, the flagship B2B campaigns “Open Doors” and “Reimagine” were launched as part of a strategic recovery drive. “Open Doors” served as a confidence-building message following the COVID-19 travel restrictions, while “Reimagine” presented South Africa as a refreshed, investment-ready destination, with campaign assets tailored to industry audiences and hosted at business events like Meetings Africa and Africa’s Travel Indaba. These campaigns were fully integrated into the global business events strategy, aligning content with sectoral storytelling and MICE repositioning. Their deployment from FY2022/23 onward restored SA Tourism’s B2B brand equity in core markets and re-established lead pipelines across qualified international buyers.

In the domestic market, brand rebuilding followed a parallel but more tactical route. The “Sho’t Left” platform became the primary vehicle for demand stimulation, equity-driven content, and domestic experience promotion. Campaign delivery under Sho’t Left was consistent across all five years, with tailored thematic activations such as “It is Your Country. Enjoy It” and “S’pani and Explore,” even during periods of budget constraints. The integration of B2B narratives into the Sho’t Left platform - particularly through campaigns promoting small tourism businesses and inclusive experiences - represented a strategic innovation in the second half of the term. Post-MTR reviews confirmed that the domestic B2B brand campaign achieved a sustained reach across travel trade channels, helping close the conversion gap between leisure interest and product engagement.

From FY2023/24 onward, a more segmented global campaign model was implemented, with customised narratives for Europe, the Americas, Asia, and the rest of Africa. This transition to locally responsive messaging enabled stronger alignment to consumer behaviour insights, source market dynamics, and trade engagement priorities. Country office feedback and ExCo reviews consistently noted the increased agility and impact of region-specific messaging during this phase, with improved lead attribution and platform resonance.

In parallel, SA Tourism introduced two new enablers that transformed its brand architecture maturity. First, the Brand Strength Index was rolled out in FY2023/24 and became a key intelligence tool for tracking trust, recall, favourability, and value-for-money perceptions across 18 priority markets. Second, influencer-driven digital content was mainstreamed through a strategy focused on youth and family segments, providing cost-effective reach and platform-native storytelling formats. By FY2024/25, over 60% of digital media impressions were driven by influencer content, and partner platforms reported higher engagement with curated travel narratives than with traditional advertising. Evaluations cited this approach as critical for re-engaging aspirational travellers and sustaining message resonance post-lockdown.

From FY2023/24, sustainability themes were incrementally integrated into destination storytelling. Campaign narratives at platforms such as World Travel Market (WTM) and Internationale Tourismus Börse (ITB) embedded sustainability framing and provided an early institutional template for aligning brand messaging with responsible tourism principles. While still nascent, these shifts reflect a pivot toward values-based branding, aligned to international norms and stakeholder expectations.

BEYOND THE BROCHURE: WHAT MAKES A STORY STICK

“When you see someone like you having that experience, it stops being a brochure and starts being a possibility.”

- Youth focus group participant, Brand Tracker Study 2024

Evaluations of campaign resonance revealed that relatability, not reach, most influenced perception shift among first-time and hesitant travellers. Youth audiences responded to peer-like storytelling, embedded representation, and locally grounded narratives that spoke to their lived realities.

For SA Tourism, this insight reframed the role of creative strategy: from amplification to validation. Stories that stuck were those that made the aspirational seem attainable - shifting messaging from promotion to inclusion, and tourism from an industry to an invitation.

At the organisational level, the coordination of messaging improved significantly. A rapid response protocol was adopted in FY2022/23 to manage reputational risks and respond to international coverage shifts. SA Tourism’s global PR system, including the relaunch of a consolidated media list and market-sensitive narrative packs, was activated through regional offices and partner agencies. By FY2024/25, the public relations system had supported 126 media engagements across seven core markets, with improved sentiment tracking and faster media turnaround.

Despite these gains, delivery was not without constraint. The absence of international campaigns in the first two years created a reputational vacuum, with several source markets reporting brand atrophy by the time campaigns resumed. Budget instability, delayed approvals, and staff turnover further limited continuity, particularly in rolling out the global repositioning. However, from FY2023/24, tighter integration between campaign planning, ExCo oversight, and digital analytics enabled better performance.

Lessons from this cluster are clear. Strategic messaging cannot be retrofitted onto platforms; it must be embedded from design. Campaign agility, data-informed narrative segmentation, and real-time public relations readiness have now been institutionalised. Crucially, campaign evaluation practices have evolved: all major domestic and international brand campaigns are now subject to post-delivery review, with performance linked to perception shifts and platform impact.

SA Tourism enters the next strategic planning cycle with a coherent brand logic, an integrated messaging toolkit, and a proven capability to activate positioning across both leisure and business segments. The output cluster’s journey from fragmentation to alignment demonstrates the value of investing in architecture before amplification and sets a new baseline for how destination brand equity must be planned, measured, and protected.

STRATEGIC ALIGNMENT MATTERS: LESSONS FROM INDABA

“The exhibitors who knew the MPIF priorities had stronger pitches. It showed in the meetings they landed.”

- Provincial partner, Africa’s Travel Indaba 2024 debrief

At Africa’s Travel Indaba 2024, delivery teams noted a marked difference in outcomes between exhibitors who aligned their propositions with SA Tourism’s strategic focus - and those who did not. Enterprises that reflected MPIF tiering, matched value propositions to platform objectives, and used brand-coherent collateral achieved better buyer traction.

This operational insight reinforced a key organisational lesson: when strategy is not just owned by planners but understood by participants, the brand becomes more than a message, it becomes a method.

12.1.2. OUTPUT CLUSTER 2: FLAGSHIP PLATFORMS AND PARTNER ECOSYSTEMS

This cluster of organisational interventions focused on leveraging high-impact events, trade platforms, bidding systems, and strategic partnerships to stimulate demand, position South Africa competitively, and expand the country’s visibility within global and domestic tourism ecosystems. It operated at the intersection of consumer-facing and B2B engagement and became increasingly central to SA Tourism’s delivery logic as the sector emerged from the COVID-19 shock.

Performance over the five-year period shows a clear two-phase trajectory. The first phase, from FY2020/21 to FY2022/23, was marked by recovery adaptation and partial delivery, while the second phase - post-MTR - reflected the maturing of these platforms into equity-driven, strategically aligned levers of demand stimulation.

The global relaunch of Africa's Travel Indaba and Meetings Africa in hybrid format in FY2021/22 signalled SA Tourism's re-entry into the international marketplace. Though constrained by pandemic protocols, both platforms were hosted successfully and laid the groundwork for a full-scale repositioning strategy that took shape over the next two years. From FY2022/23 onward, the platforms were reimagined through a unified brand identity, improved buyer curation, and stronger VTSD and SMME integration. The formalisation of "Innovation Zones," regional showcases, and hosted buyer tracks transformed these events into multi-purpose engines of equity, demand conversion, and reputation building. Organisational performance here was robust and uninterrupted from FY2021/22 to FY2024/25, with attendance, conversion, and satisfaction indicators improving annually.

Bidding support under the SANCB was consistently overachieved across all five years, with bid submissions increasing from 55 in FY2020/21 to 104 in FY2024/25. This reflected operational resilience, expanded sales pipelines, and deeper stakeholder alignment. Bid quality also improved, though the APP indicators tracked only submission volume. A major milestone was the institutionalisation of bidding impact reports from FY2023/24 onward. These assessments introduced new accountability mechanisms by quantifying economic value, and deal closure performance. Stakeholder feedback cited this as a turning point in how the value of platform participation was measured and defended.

BUILDING BUYER CONFIDENCE: MEETINGS AFRICA AS A CREDIBILITY PLATFORM

"The quality of exhibitors this year made it easier to introduce clients. It was not just marketing – it was matchmaking."

*- International buyer, Meetings Africa 2024
Post-Event Survey*

By 2024, Meetings Africa had matured into a platform that did more than promote - it persuaded. International buyers noted improved alignment between destination messaging and hosted product, with pre-qualified exhibitors, curated B2B sessions, and enhanced sector readiness cited as enablers of trust.

This shift helped reposition Meetings Africa as a credibility mechanism within the global MICE ecosystem. For SA Tourism, it demonstrated that brand authority is not built by presence alone, but by the consistency of promise and product - and by delivering commercial value where it counts: at the buyer interface.

Campaign alignment across business events and consumer platforms also improved post-MTR. SA Tourism successfully implemented one global and one domestic B2B campaign annually from FY2021/22 through FY2024/25. Messaging increasingly mirrored the broader "Live Again" brand logic, with campaigns like "Open Doors" and "Reimagine" targeting MICE segments and integrated with ATI and MA activations. The campaigns were enhanced through embassy outreach, sector-specific storytelling, and alignment with the MICE bidding calendar. However, the early years (2020 – 2022) saw delayed synchronisation between trade and consumer campaigns, a challenge raised in the Brand Evaluation Report (2024), which noted fragmented messaging and lost opportunity for joint amplification.

The Global Trade Programme marked another inflection point. Although untracked in the early years, it was formally implemented in FY2023/24 through hosted buyer programmes and trade show activations across Africa, Europe, the Americas, and Asia. The following year, rollout was partially curtailed by procurement delays and planning misalignment. This stunted momentum and underscored the importance of sequencing between trade reactivation and campaign deployment. ExCo reflections from Quarter 3 in FY2024/25 confirmed that execution gaps emerged because the trade plan lagged behind the repositioning of the global brand.

Strategic participation in global forums such as Worldwide Exhibition for Incentive Travel, Meetings, and Events (IMEX), Feria Internacional de Turismo, the International Tourism Fair, (FITUR), and WTM increased from FY2021/22 and was consistently delivered through to FY2024/25. While these were only formally tracked in APPs from FY2023/24, participation was effective earlier, with verified attendance and policy influence recorded in ExCo reports and forum reports. By FY2024/25, SA Tourism's presence at these platforms had evolved from visibility-building to narrative leadership and partnership activation.

Evaluation insights confirmed improved influence metrics, including deal pipelines and stakeholder reach, but noted that numeric participation tracking alone underrepresented platform value.

Partner ecosystems formed the final pillar of this cluster. Initial success was visible in FY2020/21 through the Google Arts and Culture collaboration, but this momentum stalled between FY2021/22 and FY2022/23, as creative sector partnerships were not maintained or resourced. This lapse limited brand storytelling diversification during a period when youth and digital audiences became more influential. From FY2023/24, however, partnership activation was reintroduced under the youth and lifestyle repositioning strategy. Collaborations were embedded within Sho't Left campaigns and global digital rollouts, though tracking remained ad hoc and not explicitly reflected in the APP performance framework.

The World Expo 2020 activation in Dubai represents a cautionary case. While the initial activation in FY2021/22 was successfully staged, four of six planned follow-up showcases were invalidated in FY2022/23 due to non-compliance with tourism incentive development protocols. This significantly diluted the potential ROI and highlighted internal weaknesses in quality assurance, compliance sequencing, and readiness for global mega-expos. ExCo reviews recommend that future mega-activation planning be underpinned by explicit compliance frameworks and real-time quality control dashboards.

Strategic lessons from this cluster are clear. First, flagship platforms can only deliver transformational value when repositioned as dynamic, multi-dimensional levers - not just event delivery outputs. Africa's Travel Indaba and Meetings Africa's transition into strategic brand assets was the result of deliberate identity reinvention, equity-aligned design, and improved hosted buyer ROI mechanisms. Second, bid volume without bid quality metrics leaves evaluability gaps. The move toward impact tracking, while late, offers a replicable model for other strategic platforms. Third, the maturity of this cluster depends on strong coordination: between campaigns and platforms, between programmes and partners, and between planning cycles and execution readiness. SA Tourism's ability to activate influence at international forums, drive demand through trade platforms, and deepen partnerships with creative sectors now forms a coherent strategic advantage. This momentum must be protected and scaled in the 2025 - 2030 cycle through formalised tracking of equity outcomes, deal conversion, and narrative resonance across the entire partner and platform ecosystem.

From FY2023/24, SA Tourism introduced sustainability-aligned features into flagship platforms, including responsible event design, enhanced accessibility protocols, and sustainability storytelling zones at ATI and MA. These initiatives were positively received in post-event surveys and reflected an evolving expectation from trade partners and exhibitors for environmentally and socially responsive brand leadership. While implementation was partial, these platforms served as important testbeds for the emerging sustainability framework.

12.1.3. OUTPUT CLUSTER 3: TACTICAL DEMAND ACTIVATION AND MARKET ENGAGEMENT

This output cluster focused on the execution of targeted campaigns, lead generation platforms, and regional activations designed to translate awareness into conversion and support sustained engagement across consumer and trade segments. It functioned as the performance engine of SA Tourism's demand-side strategy, activating preference and intent through tactical brand interventions, digital content, and platform-based messaging. Over the five-year period, the cluster matured from reactive post-COVID-19 mobilisation into a more segmented, co-funded, and data-informed engagement model, albeit with gaps in continuity, real-time measurement, and system integration.

The term began under conditions of suppressed mobility and constrained budgets. In FY2020/21, deal-driven campaigns were planned but not implemented due to global shutdowns. However, by FY2021/22,

tactical marketing activities accelerated markedly, especially in high-potential source markets where pent-up demand could be immediately activated. The year saw a surge in digital engagement, particularly in domestic and Africa regional segments, where platforms like Sho't Left and regional microsites delivered outsized reach. Africa regional digital campaigns alone reached 641 million engagements in FY2021/22 against a target of 85.7 million, demonstrating both audience appetite and SA Tourism's digital agility.

That momentum informed the institutionalisation of deal-driven campaign logic from 2022 onward. Tactical campaigns across priority markets were streamlined, co-funded with trade partners, and aligned to specific lead generation objectives. From FY2022/23 to FY2024/25, SA Tourism consistently met its APP targets for deal-driven campaigns, with partner co-investment and faster turnaround cycles contributing to operational efficiency. Campaign content became more tailored and was often platform-linked - integrated with business events calendars, embassy activations, and digital brand hubs - ensuring that demand creation was underpinned by conversion pathways.

This output cluster also housed a strategic pivot in how brand affinity campaigns were conceived, delivered, and tracked. In FY2023/24, the number of brand affinity distribution initiatives surged to 336, an unplanned but significant over-delivery enabled by provincial mobilisation, global trade representatives, and regional hubs. While this explosion of activity confirmed organisational responsiveness, it exposed weaknesses in indicator design: the APP lacked disaggregation, making it difficult to assess market-specific performance. This was rectified in FY2024/25, with new APP indicators tracking distribution channel activations across six regions: Europe, Americas, Asia & Australasia, Africa, Domestic, and Embassy Support markets. Delivery exceeded targets across all geographies - e.g. 148 initiatives in Europe (target: 30), 80 in the Americas (target: 12), and 51 in Asia & Australasia (target: 12) - reflecting strong recovery and partner-led execution. Importantly, these activations were not generic promotions; they were channel-specific partnerships with tour operators, destination management companies (DMCs). Provincial Tourism Authorities (PTAs), and foreign missions.

In the domestic market, Sho't Left remained a core platform for affinity activations and seasonal campaigns. Co-marketing with provinces and VTSD-aligned initiatives expanded the reach of tactical activations to underrepresented areas. By FY2024/25, the domestic distribution channel count had reached 23 initiatives, with activation formats ranging from community radio campaigns and township showcases to regional content partnerships. ExCo reports and trackers noted increased provincial buy-in, though the absence of a centralised reporting dashboard limited cross-programme visibility and learning.

This cluster also introduced, for the first time in FY2023/24, a structured approach to tourism economic impact communication. Framed as a periodic messaging intervention, it aimed to demonstrate the sector's quarterly economic contribution to inclusive growth, post-COVID-19 recovery, and value chain activation.

INFLUENCE WITH INTEGRITY: SHO'T LEFT'S DOMESTIC PIVOT

"We stopped talking at audiences and started building with them. That is when Sho't Left became more than a campaign - it became a space."

- Domestic marketing team, Internal reflection, 2024

Between 2022 and 2024, the Sho't Left campaign transitioned from a broad awareness platform into a more segmented, community-grounded catalyst for domestic demand. This pivot was underpinned by revised messaging architecture, deeper provincial alignment, and greater representation of underexplored travel identities. The Travel Wise Mzansi activation, youth safety ambassador programmes, and inclusive itinerary content helped embed local voice and trust into campaign design.

For SA Tourism, this shift signalled more than tactical refinement. It reflected a broader organisational maturation - from message broadcasting to community co-creation. Audience feedback, engagement metrics, and evaluation findings confirmed that campaign traction improved where narrative ownership was decentralised and lived experience was embedded. Sho't Left's evolution stands as a case of influence earned through integrity, not volume, and offers a replicable model for equity-oriented platform renewal.

By FY2024/25, the plan was fully implemented, with 52 communications deployed across themes such as sector jobs, transformation, tourism satellite account findings, and the impact of signature platforms. These messages were disseminated through a blend of earned media, stakeholder briefings, and digital storytelling. However, gaps remained in measuring audience reach, perception shifts, or media trust indices - metrics needed to evaluate the true impact of these communications on public and policy sentiment.

On the business events side, tactical demand activation focused on lead generation and enhancements to lead tracking systems. In FY2020/21, a remarkable 390 international business events leads were generated - an outlier figure reflecting pent-up demand and legacy pipeline rollovers. However, quality tracking and conversion attribution were weak. Post-MTR reforms addressed this. In FY2023/24, lead tracking was restructured through the International Congress and Convention Association (ICCA) aligned lead and partner management system, and by FY2024/25, SANCB had piloted a prioritisation model and integrated event-based lead capture. Final-year lead generation reached 250 against a target of 110, with clearer insight into deal progression, sectoral relevance, and geographic diversity. The Business Events Impact Tracker confirmed that enhanced systems improved attribution, follow-up, and bid pipeline management. Notably, this represented a shift from raw volume to qualified, strategic pipeline development.

Despite these advancements, the cluster faced persistent measurement and integration challenges. Digital performance indicators used in earlier years - such as the 2.7 million engagements recorded for domestic campaigns in FY2021/22 - were retired without replacement in APPs. Although real-time platform analytics were maintained internally, the absence of formal APP indicators limited visibility and evaluability. Similarly, early Africa digital engagement metrics were dropped post-FY2021/22 despite strong performance, creating discontinuities in trend analysis and learning feedback loops.

Embassy-supported activations, while impactful in final-year delivery (16 out of 17 initiatives achieved), suffered from weak inter-agency governance, inconsistent reporting, and fragmented budget alignment. DIRCO collaboration enabled access to strategic corridors and secondary markets, but post-activation tracking and ROI assessment were ad hoc. ExCo feedback recommended standardised templates, co-owned planning frameworks, and integrated public relations and stakeholder engagement protocols.

Several strategic lessons emerge from this output cluster. First, tactical activations are most effective when locally adapted, co-funded, and deployed with speed. This proved true across both consumer and trade domains. Second, organisational agility must be matched with systematised measurement - especially for digital and partner-led interventions. Third, demand activation and lead generation should be structurally linked, with KPIs that reflect not just volume but conversion, value, and equity impact. Finally, economic impact storytelling, when institutionalised and aligned with broader narrative arcs, can elevate tourism's developmental legitimacy and advocacy potential.

A parallel evolution occurred in how SA Tourism approached advocacy. From FY2023/24, the organisation piloted economic messaging campaigns, pairing sector performance narratives with inclusive growth and sustainability themes. These communications, underpinned by brand equity and perception tracking, sought to reinforce tourism's legitimacy as a developmental sector. This formed part of the Integrated Tourism Brand Strategy - 2029 architecture, which positions sustainability and transformation as central brand pillars in the next strategic cycle.

Looking forward, SA Tourism's tactical marketing capabilities are well positioned for scale. What is now needed is stronger indicator design, real-time analytics integration, and alignment across brand, trade, and communications functions. This cluster's transformation from fragmented campaigns to segmented, high-volume activation lays the groundwork for a more strategic, evidence-led approach in the 2025 - 2030 cycle.

12.1.4. DEMAND CREATION – SYNTHESIS AND STRATEGIC REFLECTION

Over the 2020 - 2025 period, SA Tourism's Demand Creation sub-outcome evolved from a series of fragmented campaigns and event activations into a strategically coordinated, brand-led engine of awareness, reactivation, and preference formation. The three outputs collectively repositioned the organisation's approach to generating tourism demand, both domestically and globally. This repositioning was not merely operational; it was conceptual. By embedding brand equity metrics, influencer strategies, regional content alignment, and co-funded tactical activations, SA Tourism transitioned into an insight-led organisation capable of real-time narrative deployment and market-segmented demand stimulation.

The sub-outcome made a direct contribution to Strategic Outcome 1 by strengthening the visibility, credibility, and responsiveness of South Africa's tourism value proposition. Across all five years, despite a constrained fiscal environment and multiple external disruptions, the organisation met or exceeded the majority of output targets associated with this sub-outcome. APP-verified delivery was achieved in 18 out of 19 audited outputs, and post-MTR enhancements introduced performance tracking tools that elevated the evaluability and organisational learning associated with campaign and platform execution. Critically, the sub-outcome delivered against the demand-related dimensions of the Outcome Indicator crosswalk in D.11: awareness, intent, brand favourability, and regional equity were all demonstrably enhanced through this set of interventions.

Evaluation findings and stakeholder feedback confirmed that SA Tourism matured significantly in its ability to shape, measure, and protect the destination brand. This was visible in the progressive alignment between business to consumer (B2C) campaigns and B2B trade narratives, the evolution of Africa's Travel Indaba and Meetings Africa into equity-oriented strategic platforms, the refinement of lead generation and deal pipeline tracking under SANCB, and the decentralisation of brand affinity activations through global representatives and provincial partners. Weaknesses remained - including gaps in early-year tracking, dashboard discontinuities, and inconsistencies in inter-agency campaign integration - but these were progressively addressed post-MTR through APP revisions, system enhancements, and the institutionalisation of post-activation evaluation. Critically, the groundwork was also laid for sustainability-aligned branding, with narrative integration, greening of trade platforms, and the adoption of internal frameworks to guide responsible storytelling and event delivery.

Importantly, the performance trajectory of this sub-outcome confirms a critical assumption in SA Tourism's Theory of Change: that brand trust, content localisation, and agile activation are essential precursors to demand fulfilment and sector recovery. The work concluded under Demand Creation laid the foundation for lead generation, pipeline reactivation, and economic return, the focus of the next sub-outcome, Demand Fulfilment. As the performance narrative now transitions into Sub-Outcome 1.2, the question shifts from "did the market respond to South Africa's brand positioning?" to "was that interest effectively converted into visitation, spend, and equitable benefit?"

12.2. SUB-OUTCOME 1.2: DEMAND FULFILMENT

This sub-outcome addresses the conversion of awareness and interest into realised tourism activity - encompassing actual visitation, traveller experiences, and the spatial, seasonal, and demographic distribution of sector participation. It underpins Strategic Outcome 1 by focusing on whether South Africa's tourism offering was accessible, inclusive, and capable of delivering quality engagements across both leisure and business travel segments.

As with Sub-Outcome 1.1, Demand Fulfilment was not a formal construct in the Five-Year Strategic Plan. It emerged progressively across implementation cycles and was formalised as a distinct sub-outcome

following the 2022 MTR. That formalisation enabled clearer planning and performance tracking related to destination readiness, geographic spread, visitor satisfaction, SMME and VTSD integration, and hosted experience design. By FY2023/24, Demand Fulfilment was embedded as a core organisational delivery area, with specific output indicators and performance metrics articulated in the APPs.

Responsibility for delivery was shared across three primary programmes:

- Programme 5: Tourist Experience, which led readiness, grading, quality assurance, and visitor experience initiatives, and played a growing role in access facilitation through aviation, cruise, and coordination on tourism transport and operator services.
- Programme 3: Leisure Tourism Marketing, which led global and domestic brand campaigns, travel trade activations, and the design of digital and in-market consumer platforms.
- Programme 4: Business Events, which managed hosted buyer facilitation, business event logistics, and continental trade engagement, while supporting demand fulfilment through pre- and post-event travel packaging and cross-sector stakeholder coordination.

Two additional programmes provided enabling support:

- Programme 1: Corporate Support, contributing through enterprise development, compliance oversight, equity reporting, and intergovernmental support on access and barrier removal.
- Programme 2: Business Enablement, which supported performance tracking, intelligence systems, digital platforms, and organisational dashboard development.

As detailed in Part B, this sub-outcome formed the second stage of SA Tourism's organisational delivery logic, following demand creation and preceding sector-wide governance and reputation functions. Its performance is assessed against both the developmental intent outlined in the Five-Year Strategic Plan and the outcome and impact indicators presented in parts D.11 and D.12.

From FY2023/24 onward, Demand Fulfilment was also shaped by SA Tourism's emerging sustainability priorities. While many of these interventions were in formative stages, initial alignment to sustainability principles became visible in platform recognition criteria, hosted SMME readiness support, and proposition curation tools. These developments are further reinforced by the Integrated Tourism Brand Strategy - 2029, which emphasised South Africa's positioning as a responsible, inclusive, and locally grounded destination.

This sub-outcome is structured into five validated output clusters, each aligned to a distinct area of fulfilment logic:

- 1) Quality assurance and experience standards – focused on grading systems, verification initiatives, welcome programmes, and visitor sentiment tracking to ensure service credibility, repeat visitation, and reputational resilience.
- 2) Demand conversion platforms and access – supporting actual travel through hosted events, itineraries, regional activations, and equity-focused engagement mechanisms.
- 3) Inclusive market participation and transformation – enabling SMMEs, VTSDs, and youth enterprises to access formal value chains via hosting support, platform inclusion, and quality uplift.
- 4) Experience activation and immersion – enhancing on-the-ground tourist journeys through recognition systems, and frontline experience improvement.

- 5) Supply development and proposition design – curating relevant, seasonal, and spatially dispersed experiences through destination bundling, innovation platforms, and proposition refinement.

These five clusters form the framework for the performance assessment that follows. The full analysis draws on verified APPs and ARs data, evaluations, dashboards, and supplementary records, maintaining complete reliability on the evidence base captured in the technical document supporting the End of Term Report.

12.2.1. OUTPUT CLUSTER 1: QUALITY ASSURANCE AND EXPERIENCE STANDARDS

This first cluster assessed under Sub-Outcome 1.2 focused on strengthening organisational levers for service credibility, visitor trust, and quality assurance. It comprised a five-element package of outputs spanning the refinement of the national grading system, rollout of the BQV Programme, formulation and implementation of a tourism value chain quality strategy and tracking of graded establishments and on-site quality assurance assessments conducted through TGCSA and BQV systems. Together, these interventions formed the foundation for traveller experience assurance and post-visit reputation, while also serving as an access mechanism for VTSDs and SMME operators into the formal tourism economy.

Delivery of this cluster was led by Programme 5: Tourist Experience in partnership with the TGCSA and, for BQV implementation, initially with Department of Tourism support under a formal MoU. From 2022/23, funding and implementation responsibilities were absorbed fully by SA Tourism. APP and AR data confirm that quality assurance was a continuous organisational priority, though with a marked performance shift following the MTR, which clarified pipeline linkages and unlocked structured implementation of grading reform, barrier strategies, and grassroots verification mechanisms.

The reform of the TGCSA grading model was one of the most consequential modernisation initiatives undertaken during the five-year period. Although not tracked in the first two years, by FY2022/23 the revised grading framework was fully developed and implemented, as confirmed in the APPs and ARs. This system revision was followed by a structured rollout of implementation milestones in FY2023/24 and FY2024/25, culminating in confirmation of final roadmap delivery in Quarter 4 of the FY2024/25. The updated model placed emphasis on SMME inclusion, alignment with customer expectations, and responsiveness to evolving visitor trends. Evaluation and ExCo reports affirm that this grading reform was both organisationally credible and operationally significant, positioning TGCSA for stronger value recognition in future strategy cycles. However, as noted in strategic commentary, the actual uptake of the new model remains a concern, with formal tracking required to assess progression through the quality pipeline and integration with BQV and Tourism Grading Support Programme (TGSP) instruments.

Grading coverage, as measured by the number of graded establishments, was tracked consistently for four of the five years. Performance fell short of targets in all but one year - with 4 959 graded establishments in FY2022/23 representing the peak. By FY2024/25, the figure had declined slightly to 4 586, although TGSP funding was successfully renewed and supported 798 members with R3.5 million in grant assistance. The shortfall in uptake was attributed to COVID-19 disruptions, cost barriers, and delayed renewal of the TGSP, as reflected in ARs and evaluation insights. Despite these constraints, the maintenance of a stable core network of around 5 000 graded establishments through a period of volatility reflected organisational resilience. However, regional imbalances persisted, with over 40% of graded establishments concentrated in just three provinces, namely the Western Cape, Gauteng, and KwaZulu-Natal. Stakeholder feedback pointed to the need for more granular spatial indicators and recommended integrating grading data with audience segmentation tools and digital dashboards to improve insight into quality progression and VTSD alignment.

Two quality assurance metrics were tracked only once each during the five-year period and then

discontinued. The “number of graded rooms” was recorded in FY2020/21, offering an initial insight into spatial supply depth, but was not retained in subsequent years. Likewise, 5 315 “National Quality Assessments” were reported in FY2020/21 as a standalone metric. From FY2021/22 onward, similar activity continued through TGCSA grading inspections and BQV site assessments, but without a consolidated tracking indicator. The discontinuation of these metrics created gaps in system-wide quality visibility and limited the organisation’s ability to monitor spatial readiness, supply distribution, and equity-aligned progression. Evaluation reports and ExCo briefings recommend the reinstatement of integrated quality tracking indicators to support transformation analytics and value chain development.

The development and implementation of the National Quality Strategy and barrier reduction roadmap represented a multi-year organisational effort to embed experience assurance across the tourism value chain. Strategy development occurred in FY2023/24, and implementation milestones were achieved across all four quarters of FY2024/25, including inclusive frontline training, experience audits, and systemic inspections. The roadmap provided a structural response to the long-standing challenge of uneven service quality and fragmented assurance standards. Evaluation findings confirmed that this initiative filled a critical gap in SA Tourism’s toolkit, and its potential as a cornerstone organisational output was noted by multiple stakeholders. Notably, the strategy also introduced sustainability-aligned inspection tools and frontline training content, designed to assess environmental and social readiness of emerging products and destinations. Strategic reflection strongly supports its institutionalisation in the next planning cycle, with annual reporting on scale, coverage, and quality impact across market segments and geographies.

The BQV Programme was the only output in this cluster to target grassroots VTSD enterprises directly. Launched in FY2020/21 through a pilot in the Eastern Cape, it verified 185 businesses by FY2021/22. In FY2022/23, the programme expanded into KwaZulu-Natal and adjacent provinces, enrolling a total of 679 enterprises into the onboarding pipeline. By the end of FY2023/24, 210 businesses had completed the full verification process and were referred to platform partners. Phased delivery in the final two years included site verification, platform referrals, and roadmap finalisation. Evaluation reports confirmed the programme’s relevance, credibility, and transformative impact - especially in terms of emerging enterprise confidence and provincial partnership development. Nonetheless, gaps were identified in digital integration, long-term pipeline tracking, and the absence of formal indicators in the APP, which constrained strategic visibility despite the programme’s demonstrated value.

In synthesis, this work reflected a coherent organisational effort to embed quality assurance and uplift the visitor experience into the core of SA Tourism’s demand fulfilment logic. Performance improved markedly after the MTR, with structured grading reform, barrier strategy implementation, and BQV rollout all confirmed. However, critical remained in system interoperability, pipeline monitoring, and the long-term institutionalisation of VTSD-aligned quality progression. The cluster’s delivery outcomes contributed directly to the outcome indicators analysed in Part D.11, especially visitor satisfaction and hosted experience quality, and helped explain progress made in shifting traveller perceptions, improving readiness, and strengthening the national tourism brand. Its success will be sustained only if BQV, TGSP, and TGCSA systems are fused into a measurable progression pipeline - one that is tracked, disaggregated, and aligned to experience equity goals in the next strategic cycle.

12.2.2. OUTPUT CLUSTER 2: DEMAND CONVERSION PLATFORMS AND ACCESS

This cluster of planned performance interventions focused on enabling actual visitation through a suite of hosted events, regional activations, and trade-facing platforms, all designed with an intentional emphasis on spatial equity and the inclusion of VTSDs. Serving as a critical bridge between brand-led demand generation and on-the-ground travel experiences, these interventions translated intent into conversion by creating access points for historically marginalised destinations and enterprises.

One of the most sustained delivery areas within this cluster was the support provided for national business events hosted in VTSDs. The intervention originated as a strategic pilot in FY2020/21 and was formally scaled up in subsequent years through the implementation of the National Association Plan. From FY2021/22 onwards, SA Tourism consistently met or exceeded its target of five supported events per year, culminating in nine hosted events in FY2024/25. These events attracted 1 457 delegates and generated R13.27 million in direct economic impact. The steady growth of this intervention reflected improved coordination with sector associations, strategic alignment of bidding support, and the integration of VTSD criteria into business event planning. Over time, this output evolved into a flagship transformation mechanism under the SANCB, supporting local procurement and inclusive development in underrepresented regions. However, while event volumes were well tracked, there remains a need to expand performance metrics to include economic impact, regional spend, SMME inclusion, and delegate satisfaction in order to evaluate the full developmental value of this intervention.

A further focus under this cluster was the development and implementation of provincial hosting itineraries. These itineraries served as structured familiarisation journeys designed to expose trade, media, and key opinion formers to new and emerging provincial experiences. Initially tracked in FY2020/21 through APP indicators, the output was later monitored internally via hosting logs and organisational review processes. Delivery volumes increased steadily over the review period - from 27 itineraries in the baseline year to 49 in FY2022/23 and 54 in FY2024/25. What marked a qualitative shift, however, was the increased inclusion of VTSD-linked products within these itineraries. By the final year of the review period, over half of all hosted itineraries featured VTSD experiences, including township tours, rural stays, and locally owned hospitality offerings. This equity lens transformed what had once been a logistical hosting tool into a strategic vehicle for spatial redress and inclusive market exposure. The development was recognised as an organisational good practice, particularly given its alignment to transformation priorities and its reach across all nine provinces. There is now strong support for reinstating annual APP tracking of this output and formally linking itineraries to measures of visitor yield and SMME deal flow.

DESIGNING FOR ARRIVAL: THE VTSD READINESS GAP

“There’s no point selling a village if no one knows where to park, or eat, or even call for help.”

- Regional Tourism Officer, Programme Evaluation on Domestic Campaigns, 2024

SA Tourism’s push to promote lesser-known destinations through equity-focused campaigns often ran up against infrastructure and readiness barriers. Evaluation feedback from provincial stakeholders consistently flagged gaps in signage, amenities, digital discoverability, and safety reassurance - particularly in township and village locations.

While these were beyond SA Tourism’s direct control, they directly shaped visitor confidence and satisfaction. This reinforced a core realisation: demand fulfilment requires more than attraction; it requires access. And making a destination visible is not the same as making it viable.

In response to the growing demand for equity-focused metrics, a new indicator was introduced in FY2024/25 to capture the proportion of hosted itineraries that included at least one VTSD product. This indicator was made possible by the launch of a dashboard-based itinerary management system, which enabled real-time disaggregation of itinerary content. Final year data confirmed that 56% of itineraries included VTSD experiences, exceeding internal targets and affirming the strategic shift towards spatial equity mainstreaming. The introduction of this metric not only improved internal planning but also reinforced the broader transformation agenda. It is now widely supported for inclusion in future APP cycles, where it can be paired with hosted buyer ROI measures and spatial performance outcomes.

VTSD product integration was also advanced through speed marketing sessions, which were adapted into a robust access platform for underrepresented tourism providers. The early years of the review period, particularly FY2020/21 and FY2021/22, saw this output constrained by COVID-19 disruptions. Nonetheless, provincial pilots in KwaZulu-Natal and Tsitsikamma in the Western Cape laid the foundation

for institutionalising VTSD inclusion. From FY2022/23 onward, speed marketing sessions became a standard component of Africa's Travel Indaba and other major platforms, with dedicated VTSD slots and structured engagement formats. By FY2023/24, five sessions with strong VTSD participation had been hosted at Africa's Travel Indaba, and this approach was repeated in FY2024/25 with the inclusion of township guesthouses, rural experience providers, and other SMMEs. At least four of the six sessions delivered at Africa's Travel Indaba each year included these offerings, with structured buyer engagement and branding support. The transformation of this output from a generic marketing tool into a structured inclusion platform demonstrated organisational responsiveness and delivery maturity. However, performance tracking remains inconsistent across formats, and recommendations have been made to formally disaggregate indicators by platform type and to introduce metrics on VTSD-linked leads, bookings, and conversion.

Another key access point developed under this cluster was the Sho't Left Travel Week VTSD activation model. This intervention involved provincial-level activations that were aligned to the national Travel Week promotional calendar, with a particular focus on showcasing VTSD destinations, SMMEs, and community-based experiences. Four such activations were staged in FY2021/22 and again in FY2024/25, covering four provinces in each instance. These activations included hosted experiences, media engagements, booking facilitation, and co-branded exposure, allowing local products to reach broader consumer and trade audiences. Although not reflected in formal APP indicators, this output was recognised through evaluation findings and internal performance reviews as a highly effective conversion platform. The consistency of implementation across two separate years confirms the institutionalisation of this format, and there is now a strong recommendation to incorporate these activations into the formal APP performance framework as part of SA Tourism's VTSD visibility strategy.

Furthermore, this cluster focused on the allocation of exhibition space to SMMEs through SA Tourism's major trade platforms, including Africa's Travel Indaba and Meetings Africa. A baseline of 25% seat allocation was set in FY2021/22 and was consistently exceeded in the years that followed. By FY2024/25, 44% of available seats were occupied by SMMEs, reflecting deliberate transformation planning and the continued support of the Department of Tourism. Implementation was strengthened through specific inclusion mechanisms such as the Hidden Gems Pavilion and the Sustainability Village, which provided curated exposure opportunities for emerging enterprises. These platforms not only provided exhibition space but also enabled enterprise storytelling, deal flow, and hosted buyer interaction. The Hidden Gems platform in particular became a symbol of inclusive access and was replicated across multiple years. From FY2023/24, sustainability-linked pavilions - such as the Sustainability Village at Africa's Travel Indaba - were also introduced to promote responsible tourism offerings and signal alignment to responsible tourism priorities. However, while the percentage-based targets were consistently met, there was limited tracking of conversion outcomes, SMME progression, or platform impact. Strategic reflections from evaluations and stakeholder forums have called for a next-generation indicator set that tracks both the volume and quality of SMME participation, including deal closures, partnership development, and longitudinal lead management.

FROM STAGE TO STREET: WHAT EVENTS TAUGHT US

"If there is no easy way to get from the airport to the venue, your itinerary falls apart. Access and flow matter."

- Meetings Africa 2024 Debrief Report

While South Africa's business events drew global praise for their content and cultural richness, post-event debriefs highlighted persistent fulfilment gaps. Delegates raised issues around local transport links, wayfinding, and seamless integration between venues and hospitality hubs.

For SA Tourism, this feedback sharpens understanding that destination success is not just about audience pull, but about logistical friction. When access, orientation, and local partner coordination falter, even the best-designed experiences risk reputational cost. Fulfilment, in this context, is about flow, not just arrival.

Beyond the spatial focus of VTSD interventions, SA Tourism also began to engage more deliberately with systemic access barriers that influence destination choice and travel conversion. Through Programme 5, formal workstreams were introduced on cruise terminal coordination, intermodal mobility facilitation, and the development of a route pipeline aligned to the Global Trade Plan. Additionally, SA Tourism partnered with the Departments of Tourism as well as Home Affairs under the Tourism Transport and Operator Services platform to support visa process improvements and sector engagement. While modest in scale, these interventions reflected a strategic transition from indirect observation to direct participation in easing access - a shift that positioned SA Tourism as a more active enabler of mobility and fulfilment.

Taken together, this work demonstrated clear delivery momentum in converting demand into actual visitation and inclusive platform access. Across all seven outputs, performance improved steadily over the review period, particularly after the 2022 MTR. What began as a series of fragmented inclusion efforts matured into a coherent equity-focused access platform, with VTSD representation increasingly embedded into core event design, itinerary planning, and hosted engagement models. Organisational reflections confirm that the performance of this cluster contributed directly to Strategic Outcome 1 by reducing structural access barriers, promoting spatial redistribution of tourism benefit, and enabling real economic participation for previously marginalised operators. Moving forward, the challenge lies not in platform creation but in deepening the measurement of inclusion quality, tracking downstream outcomes, and embedding these access channels into a systematised and evaluated VTSD strategy.

12.2.3. OUTPUT CLUSTER 3: INCLUSIVE MARKET PARTICIPATION AND TRANSFORMATION

This cluster of planned interventions focused on structurally integrating small, new, and marginalised tourism enterprises - particularly those based in VTSDs - into the formal tourism value chain. It represented SA Tourism's most direct mechanism for economic inclusion under Sub-Outcome 1.2, supporting the transformation imperative by enabling enterprise visibility, access, and participation across hosting platforms, verification systems, and trade-facing campaigns.

The first output in this cluster tracked the inclusion of SMMEs in SA Tourism's hosting activities. In FY2020/21, 39 SMMEs were hosted through formal programmes, after which the indicator was retired from the APP framework. However, far from stalling, performance accelerated markedly in the post-MTR period. Between FY2022/23 and FY2024/25, organisational platforms such as Meetings Africa, Africa's Travel Indaba, and the Hidden Gems Pavilion enabled the hosting of approximately 402 SMMEs. This expansion reflected a deliberate effort to embed inclusion into the core design of hosting engagements, particularly in provincial activations and VTSD-targeted exhibitions. The success of this approach was underpinned by collaboration with Provincial Tourism Authorities and the Department of Tourism, which co-funded participation and facilitated lead conversion. Although visibility increased dramatically, the absence of APP-linked tracking and systematic enterprise follow-up mechanisms limited the organisation's ability to monitor downstream outcomes. Strategic recommendations have since called for the reinstatement of this indicator, with regional disaggregation, event typology, and post-hosting procurement performance to evaluate impact.

The second and third outputs were interlinked phases of the BQV Programme, designed to verify and support SMME accommodation providers in VTSDs toward market readiness and eventual inclusion in formal systems such as the TGCSA. The baseline phase began in FY2021/22, with 288 enterprises enrolled and 185 properties verified across the Eastern Cape. Seventy-one of these were deemed eligible for follow-on support. Building on this pilot, a second-phase rollout occurred in KwaZulu-Natal during FY2023/24, where 210 products were assessed against a target of 208, achieving full programme implementation. The BQV Programme provided foundational support, including site inspections, coaching, and referrals to grading and platform partners. While the programme was not embedded in the APP

framework, it was regularly monitored through evaluations and ExCo tracking. Final-year delivery marked a national milestone, confirming BQV's role as an SMME transformation tool that bridged informal enterprise support with the demands of formal platform participation. Nonetheless, the absence of institutionalised progression indicators - linking BQV beneficiaries to grading systems, SMME directories, or sales platforms - emerged as a major constraint. Organisational reflections called for integration of BQV data into enterprise support tracking tools and its alignment with the TGSP and hosted buyer frameworks to enable full lifecycle tracking of enterprise transformation.

The fourth focus of work was the implementation of the Global Trade Programme, a repositioned global B2B campaign focused on advancing equitable market access through international trade platforms. While initial planning began in FY2021/22, the programme only gained full traction after the MTR. From FY2022/23 onwards, delivery was confirmed across three consecutive years, with campaign performance intensifying under the "Exceptional People, Places and Innovation" narrative. In FY2023/24 and FY2024/25, over 135 campaign assets were deployed globally, with confirmed lead generation and brand repositioning across multiple source markets. The campaign was executed in partnership with regional hubs, marketing teams, and included embedded transformation messaging to elevate South Africa's inclusive tourism proposition. By FY2024/25, the Global Trade Programme also included sustainability-themed narratives and responsible travel positioning, as outlined in the FY2024/25 brand rollout briefings and trade toolkit decks. However, the campaign also experienced operational gaps. In FY2024/25, sequencing and procurement misalignments weakened narrative continuity, and internal reviews noted the absence of structured ROI tracking and lead conversion analytics. Despite these limitations, the programme was recognised in external evaluations as an effective global repositioning tool with high resonance among trade partners. Going forward, organisational stakeholders have called for the Global Trade Programme to be managed under a multi-year sequencing framework, co-owned by brand, sales, and ExCo, and supported by integrated metrics for reach, resonance, and conversion.

Across all four outputs, the cluster demonstrated a clear trajectory of maturation following the MTR. SMME inclusion shifted from one-off events to mainstreamed access models; the BQV Programme established a scalable quality assurance pipeline; and the Global Trade Programme reinforced brand transformation on the global stage. Yet, despite these achievements, systemic weaknesses in tracking, progression visibility, and integrated enterprise-level data systems remained. There was no organisational dashboard linking enterprise support to outcome-level indicators such as procurement value, lead closure, or repeat participation. This constrained the ability to evaluate return on transformation investment and limited the strategic feedback loop for inclusive growth planning.

Organisational lessons emerging from this cluster are critical for the next strategic cycle. First, inclusion cannot rely solely on event participation, it must be underpinned by pipeline development, system tracking, and enterprise readiness mapping. Second, quality assurance initiatives like BQV require clear pathways into grading and platform participation to avoid becoming standalone interventions. Third, global trade campaigns must be designed with conversion in mind, not just visibility. Lastly, SA Tourism's enterprise support systems must evolve to capture and track the full lifecycle of engagement - from verification to market activation and measurable performance outcomes.

READINESS IS NOT RIBBON-CUTTING

"We rush to open attractions. But without trained guides, Wi-Fi, or signage, people leave disappointed."

- Local product owner, Strategic Platform Assessment, 2024

Field-level assessments of packaged tourism products, especially in emerging nodes, revealed that market readiness is often overestimated. Attractions were launched with promotional fanfare but lacked operational basics: visitor services, coherent branding, or integrated itineraries.

This observation points to a broader lesson: fulfilment is not a ceremonial milestone. It is a long-game of aligning product, place, and experience - with credibility earned only through consistent delivery. For SA Tourism, the implication is clear: support to provinces and SMMEs must go beyond exposure to include sustained capability development.

In summary, this work advanced SA Tourism's transformation mandate by supporting SMME inclusion at scale, formalising basic verification processes, and embedding equity into global trade narratives. These interventions contributed directly to Strategic Outcome 1 by expanding participation in the tourism economy and supporting the redistribution of opportunity to emerging enterprises in historically excluded areas. Realising the full value of this work will now depend on institutionalising progression tracking, refining performance indicators, and embedding inclusive access within the formal structures of SA Tourism's platform architecture and planning systems.

12.2.4. OUTPUT CLUSTER 4: EXPERIENCE ACTIVATION AND IMMERSION

This cluster of organisational interventions focused on enhancing the on-the-ground visitor journey by strengthening emotional connection, service interaction, and quality perception. It sought to translate brand awareness into meaningful experience by activating frontline engagement tools, initiatives to uplift visitor services initiatives, and recognition platforms - particularly those that showcased the diversity, warmth, and excellence of the South African tourism offering. These interventions became vital during the post-COVID-19 recovery period, as SA Tourism sought to rebuild visitor trust, boost satisfaction, and differentiate the destination through quality immersion.

The first output within this cluster was the revitalisation and implementation of the Welcome Programme. While not tracked through formal APP indicators, the programme was reactivated in FY2021/22 and progressively institutionalised over the subsequent two years. Initial delivery focused on toolkit audits and the "Make Someone's Day" campaign, launched at MA and through TGCSA platforms. These early activities signalled a renewed commitment to service excellence as a core brand asset. Following the MTR, the programme adopted a structured roadmap format with milestone-based implementation tracked across FY2022/23 and FY2023/24. This included expanded toolkit deployment, stakeholder partnerships, and integration into trade and consumer-facing platforms. By the end of the strategic period, the Welcome Programme was positioned as a national visitor experience upliftment initiative, despite lacking a dedicated APP performance indicator. Organisational reflections have since recommended the introduction of measurable visitor experience outcomes linked to this intervention, as well as stronger alignment with the BQV Programme and improving visitor sentiment and experience.

The next work area in this cluster focused on tracking of the Net Promoter Score (NPS) and its related visitor sentiment metrics. From FY2022/23 to FY2024/25, quarterly NPS reports were produced with data segmented by market type for sample of customers from graded establishments. This enabled consistent insight into visitor experience quality and allowed for the identification of emerging trends across different traveller profiles. The use of NPS over multiple reporting periods contributed to a deeper organisational understanding of visitor satisfaction and drivers. Looking ahead, a broader sentiment-based methodology will be applied to capture sentiments from all travellers who leave a digital footprint, such as through reviews of tourism products or experiences while in South Africa. This expanded approach will move beyond graded establishments to offer a more inclusive and dynamic view of visitor sentiment. The resulting insights will support the refinement of tourism experiences, inform benchmarking, and contribute to ongoing experience improvement efforts across the sector.

The next work area was the reconfiguration of national tourism awards and recognition platforms. The standalone Lilizela Awards - previously the flagship recognition model - was placed on hold between 2020 and 2022 due to the COVID-19 pandemic and fiscal reprioritisation. The recognition function was then embedded within existing trade platforms, with full implementation confirmed across Africa's Travel Indaba and Meetings Africa in FY2023/24 and FY2024/25. These reimaged ceremonies celebrated excellence across SMMEs, tour guides, and frontline service categories, with strong visibility and alignment to transformation and equity goals. By decentralising recognition and hosting it within core industry

gatherings, SA Tourism achieved both cost efficiency and strategic relevance. Stakeholder feedback praised the integration model for its credibility, visibility, and motivational impact, especially on VTSD-aligned operators. Nonetheless, the absence of a formal APP indicator for tourism recognition platforms created a visibility and evaluation gap. Organisational lessons recommend renaming this output to reflect its broader scope (e.g. “Tourism Recognition Platforms”) and embedding it into future APP frameworks, with transformation, regional diversity, and platform-linked outcomes explicitly tracked.

Taken together, the outputs of this cluster formed the experiential backbone of SA Tourism’s domestic and hosted visitor strategy. From welcome campaigns and frontline training to real-time sentiment tracking and institutionalised recognition, these interventions helped shape how visitors felt, responded, and remembered their interactions with the South African tourism brand. The post-MTR period was particularly significant, marking a shift from ad hoc initiatives to structured, milestone-driven implementation.

However, delivery was constrained by legacy issues and measurement gaps. The Welcome Programme, though widely deployed, was never formalised in the performance framework, limiting continuity and budget clarity. Visitor experience data from the early years lacked consistency, and APPs did not track the full spectrum of quality, recognition, or feedback interventions. These limitations affected organisational evaluability and learning, despite substantive delivery on the ground.

Organisational lessons emerging from this area of work are clear. Experience upliftment must be treated as a strategic output area, not an add-on. Metrics should reflect quality as perceived by visitors, disaggregated by segment, and tracked over time. Initiatives such as the Welcome Programme and recognition platforms must be institutionalised through formal indicators and integrated with broader transformation and satisfaction strategies. Above all, future experience activation must be consolidated under a single, coherent quality assurance framework - one that connects the BQV Programme, visitor sentiment and experience insights, TGCSA grading, and frontline recognition mechanisms into a measurable pipeline of experience enhancement.

In the context of Sub-Outcome 1.2, this cluster contributed directly to improving service quality, brand affinity, and visitor satisfaction - key determinants of repeat visitation, positive word-of-mouth, and sector resilience. Its impact extended beyond perception, shaping the reputational and emotional foundation on which tourism recovery and growth were built. As the next strategic cycle approaches, the consolidation and elevation of these interventions into an integrated visitor quality strategy will be essential to deepen impact, strengthen organisational maturity, and sustain inclusive demand fulfilment.

12.2.5. OUTPUT CLUSTER 5: SUPPLY DEVELOPMENT AND PROPOSITION DESIGN

This final cluster under Sub-Outcome 1.2 focused on shaping South Africa’s tourism product offering to better align with market expectations, seasonal cycles, and spatial equity imperatives. It addressed the demand fulfilment challenge not only through experience delivery, but by curating relevant propositions that could convert awareness into bookings and elevate underrepresented destinations and enterprise segments. Across the five-year period, this cluster matured into a targeted organisational lever for demand-side alignment, although it remained under-tracked during the early years and faced structural barriers to scale.

Performance in this cluster is anchored on three interrelated lines of delivery: the development of a structured destination proposition framework, the bundling of market-ready experiences under Sho’t Left and other platforms, and the pursuit of innovation to address high-value and emerging travel segments such as youth, wellness, and adventure markets.

The first major milestone was the development of the national destination proposition in FY2022/23. Though not tracked in prior years, the framework's conceptualisation marked a turning point in how SA Tourism approached product alignment and messaging cohesion. The proposition was designed to reposition South Africa's domestic and regional offerings with clearer value articulation, seasonal coherence, and segment targeting. Delivery was implemented through a structured roadmap, with phased milestones completed in Quarters 3 and 4 of FY2023/24 and sustained into FY2024/25. The proposition informed packaging content, experience design, and hosting templates across the Sho't Left platform, regional activations, and campaign rollouts. Evaluation records confirmed that this was one of the most significant organisational tools for enhancing product readiness and destination appeal during the latter part of the term.

Bundling of tourism experiences formed the operational backbone of this cluster. Tactical bundling was piloted during Sho't Left Travel Week in FY2021/22, offering curated offers linked to regional hubs, local attractions, and community enterprises. By FY2022/23, bundling was extended and structured around tiered packaging logic, incorporating SMME offerings, VTSD-linked products, and thematic campaign overlays. These packages were increasingly featured in Sho't Left campaign rollouts, regional VTSD itinerary guides, and hosted buyer platforms. By FY2024/25, bundling had become an institutionalised mechanism for both public-facing and trade platforms, with curated offerings activated at Africa's Travel Indaba, Meetings Africa, and provincial showcases.

The performance narrative of this bundling effort is one of gradual strategic maturity. While the APPs did not formally track the number or conversion of bundled products, evaluation reports and ExCo trackers confirm that bundled offerings played a decisive role in enabling regional dispersal, SMME exposure, and seasonal demand levelling. Sho't Left evolved beyond a visibility platform into a conversion channel, supported by proposition curation tailored to youth, family, and price-sensitive segments. Despite this progress, systemic gaps remained: booking pathway tracking for bundled propositions was limited, and SMME readiness often constrained package quality, pricing coherence, and repeatability. Feedback from provincial partners and BQV assessments pointed to the need for bundling skills development and demand-side feedback loops to refine packaging quality.

The focus of this cluster was innovation in proposition design. This line of work was not tracked in APPs but was verified through MTR findings, campaign evaluations, and platform showcases. Between 2021 and 2024, SA Tourism introduced a series of pilot concepts in the adventure and wellness domains - such as glamping, eco-luxury travel, and multi-modal itineraries - which were showcased at trade events, embedded in hosted buyer sessions, and profiled in regional activations. By FY2024/25, innovation was visible in high-yield package development targeting youth and regional diaspora travellers and became embedded into strategic planning and trade presentations. Evaluations confirmed that these concepts enhanced platform appeal and opened up new consumer pathways, though their organisational traction

FROM INTEREST TO IMPACT: WHY DEMAND FULFILMENT REQUIRES MORE THAN LEADS

"We had the clicks, the shares, the saves - but people were not showing up. Something was missing between the screen and the street."
- ExCo Strategic Review, 2024

Between 2022 and 2025, SA Tourism's digital platforms and domestic campaigns achieved strong engagement volumes - particularly through Sho't Left activations and mobile-friendly leisure content. However, campaign dashboards and conversion reports revealed a persistent disjuncture: digital interest did not consistently translate into arrivals, especially in rural and emerging destinations.

The barriers were structural as much as strategic: infrastructure gaps, transport affordability, and experience readiness frequently disrupted the visitor journey. In response, ExCo introduced new demand-readiness metrics in FY2023/24, integrating provincial infrastructure inputs into campaign planning. This operational shift helped clarify that demand fulfilment is not a function of marketing alone, it depends on supply-side alignment, ecosystem collaboration, and the readiness of destinations to receive the demand being generated.

was constrained by the absence of formal indicators or budgeting frameworks to scale and monitor them.

Importantly, proposition innovation proved most effective when integrated into broader campaigns or bundled with existing demand-generation platforms. For example, glamping showcases were aligned with Meetings Africa and linked to sustainability messaging, while youth-targeted packages were supported by influencer-driven Sho't Left activations. Stakeholder feedback consistently affirmed the value of these innovations in strengthening South Africa's appeal to non-traditional segments and enhancing the emotional and experiential dimensions of the visitor journey.

The FY2024/25 launch of the Product Proposition Sustainability Survey also signalled a strategic pivot in this cluster. Insights from this diagnostic were used to assess the readiness of curated experiences and inform future packaging guidelines. Evaluations confirmed growing consumer appetite for low-impact, community-grounded, and wellness-oriented experiences, especially among regional diaspora and youth travellers. These preferences are now embedded in the design parameters of SA Tourism's emerging proposition logic.

Despite demonstrable gains, this cluster's early years suffered from under-formalisation. Neither destination proposition design nor innovation pathways were tracked prior to FY2022/23, and bundling was referenced only in narrative sections of APPs and ARs. As a result, trend analysis across the five-year period is limited, and the link between product readiness and actual booking conversion remains analytically weak. Tracking systems did not disaggregate bundled performance, and equity-linked proposition uptake by VTSD-linked travellers was not measured. These limitations hindered the organisation's ability to tell a fully data-backed supply transformation story.

Nonetheless, from the mid-term period onward, this work became a cornerstone of SA Tourism's demand fulfilment strategy. Proposition development provided the connective tissue between content, hosting, and conversion, and served as a platform for enterprise inclusion, destination differentiation, and narrative alignment. It also offered a flexible mechanism to localise experiences, respond to consumer trends, and reinforce regional dispersal objectives. These outcomes were central to progress on outcome indicator dimensions related to product relevance, traveller satisfaction, and spatial equity, as detailed in Part D.11.

The experience of this cluster of work underscores three key organisational lessons. First, proposition development is not a marketing add-on; it is a strategic function that should be formally embedded in programme planning and APP tracking. Second, innovation in packaging - whether for wellness, youth, or sustainability segments - must be systematised, not opportunistic. Third, bundling must be analytically tracked using campaign monitoring systems and hosted buyer records, with booking patterns, traveller feedback, and SMME impact data integrated to inform platform design and campaign refinement.

Looking forward, proposition design should be institutionalised as a standing workstream within Programme 5: Tourist Experience, with linkages to Sho't Left, VTSD platforms, and hosted buyer pipelines. Innovation must move beyond ad hoc case studies into structured implementation tracks, with measurable KPIs and budgeted scale-up plans. Bundling must be supported by SMME capacity-building, tagging within digital asset systems, and disaggregated uptake metrics to close the loop between supply availability and demand realisation. These shifts will be essential to delivering on SA Tourism's inclusive growth mandate in the next strategic cycle.

12.2.6. DEMAND FULFILMENT – SYNTHESIS AND STRATEGIC REFLECTION

Over the 2020 - 2025 period, SA Tourism's Demand Fulfilment sub-outcome matured from a loosely defined implementation zone into a structured organisational pillar aimed at converting awareness into realised tourism activity. Through five integrated output clusters - ranging from quality assurance and

platform access to inclusive participation, experience immersion, and proposition design - this sub-outcome enabled the delivery of on-the-ground value for both visitors and the tourism ecosystem. Unlike its counterpart in Demand Creation, which focused on narrative generation and audience stimulation, Demand Fulfilment operationalised the promise of the brand, translating traveller interest into actual visitation, equitable spread, and enhanced experience quality.

This sub-outcome made a direct contribution to Strategic Outcome 1 by enabling accessibility, inclusion, and readiness across the tourism value chain. Collectively, its 23 validated outputs addressed some of the most tangible elements of the tourism journey: who is hosted, what is packaged, how experiences are delivered, and which enterprises participate. While early delivery was disrupted by the COVID-19 crisis and APP indicator gaps, the post-MTR period from FY2022/23 onward saw a marked intensification in programme performance, indicator formalisation, and organisational alignment. Notably, 20 of the 23 outputs demonstrated either consistent delivery or significant post-MTR recovery. Several evolved from once-off pilots into core delivery systems - such as the BQV Programme, Sho't Left bundling tools, and hosted SMME participation at strategic platforms.

Critically, this sub-outcome delivered against the fulfilment-related dimensions of the Outcome Indicator crosswalk in D.11: hosted experience quality, spatial and seasonal spread, and enterprise inclusion all showed improvement across the five-year term. For instance, NPS tracking stabilised post-COVID-19, revealing consistent satisfaction levels in the 30 - 40% range and outperforming global post-pandemic averages in the business travel segment. The BQV rollout reached over 200 SMMEs across two provinces, laying a foundation for inclusive quality progression. Meanwhile, hosted platforms like Africa's Travel Indaba and Meetings Africa consistently exceeded SMME participation targets, reinforcing SA Tourism's transformation intent.

Evaluation findings and stakeholder feedback confirmed that this sub-outcome was central to shifting organisational culture toward delivery equity, experience quality, and evidence-informed improvement. This was visible in the increasing use of customer sentiment data, the elevation of tourism recognition platforms, and the integration of previously marginalised suppliers into bundled propositions and hosted buyer programmes. Experience upliftment, once considered a soft outcome, became structurally embedded - reflected in the institutionalisation of the Welcome Programme, NPS dashboard tracking, and the migration of the Lilizela Awards into integrated recognition models at flagship platforms.

Nevertheless, weaknesses persisted. Many early-year outputs lacked formal APP indicators, limiting longitudinal evaluability. System integration for tracking quality performance, enterprise progression, and bundled proposition uptake remained underdeveloped, limiting the organisation's ability to monitor downstream outcomes. Targets for key indicators - such as NPS - were set at unrealistic levels and not revised, undermining public perception of progress. Despite clear innovation in product packaging and concept incubation, output-level tracking for proposition development and bundling was not fully institutionalised. These limitations constrained SA Tourism's ability to demonstrate full attribution from investment to outcome.

Strategically, the performance of Demand Fulfilment validates several assumptions within SA Tourism's Theory of Change. First, conversion requires not just awareness but access, through itineraries, equity platforms, and demand-responsive supply systems. Second, visitor satisfaction is shaped not only by messaging but by quality assurance, hosted experience design, and frontline readiness. Third, spatial and demographic equity in tourism depends on supply-side innovation, packaged proposition design, and the integration of SMMEs and VTSD-linked experiences into formal platforms. These insights affirm that fulfilment is not a downstream function, but an equal pillar of destination competitiveness. They also confirm that sustainability is becoming an essential dimension of demand fulfilment - not just a reputational asset, but a tangible lever for market differentiation, product credibility, and long-term visitor satisfaction.

As SA Tourism enters the next strategic cycle, this sub-outcome offers both a delivery foundation and a transformation imperative. The work done between 2020 and 2025 demonstrates that organisational systems can, when aligned, translate strategic intent into on-the-ground access, quality, and inclusion. But to sustain and scale these gains, future planning must address system integration gaps, sharpen indicator design, and embed equity-linked fulfilment logic into every aspect of visitor journey planning, enterprise development, and platform strategy. The bridge from interest to impact must be made measurable, repeatable, and inclusive. Sub-Outcome 1.2 has shown the way; now, the challenge is to consolidate, institutionalise, and expand that pathway across the sector.

12.3. SUB-OUTCOME 2.1: RELEVANT TOURISM INTELLIGENCE AND DIGITAL ECOSYSTEM

This sub-outcome addresses South African Tourism's capacity to generate, manage, and apply tourism intelligence through a fit-for-purpose digital ecosystem. It underpins Strategic Outcome 2 by ensuring that organisational decisions, stakeholder engagements, and performance tracking processes are grounded in reliable data, dynamic analytics, and integrated digital infrastructure. Over the five-year period, this function evolved into a core enabler of planning, reporting, and strategic delivery.

As outlined in Part B, Sub-Outcome 2.1 formed a foundational component of the organisational delivery logic, enabling both internal performance alignment and external responsiveness to partner, government, and market information needs. While not framed as a distinct sub-outcome in the Five-Year Strategic Plan, its logic and structure were progressively formalised through successive APPs and organisational reviews. Following the 2022 MTR, this area was repositioned as a strategic capability, embedded within the governance and execution model, and supported by dedicated performance outputs.

Delivery was led primarily by:

- Programme 2: Business Enablement, which designed and managed the organisation's data architecture, insight platforms, performance dashboards, and digital intelligence systems.
- Programme 1: Corporate Support, which provided ICT infrastructure, data governance, and enterprise risk controls to support secure and integrated system operations.
- Programmes 3 and 4 and 5, which supported insight dissemination, digital platform usage, and feedback loop integration across audience segments.

The organisational shift from fragmented intelligence generation to structured insight delivery was reinforced by the formal adoption of performance dashboards, evaluation tools, and integrated reporting platforms from 2023 onward. This transition responded to the post-MTR emphasis on data-driven planning, partner accountability, and stakeholder transparency.

From FY2023/24 onward, this sub-outcome also began integrating sustainability-linked content signals into its digital and intelligence platforms. SA Tourism's intelligence products, dashboards, and performance systems progressively reflected sustainability-aligned messaging, audience sentiment on responsible tourism, and brand association with inclusive, ethical, and equitable tourism principles - as framed in the Integrated Tourism Brand Strategy - 2029 and the emerging sustainability framework.

This sub-outcome is structured into four performance clusters:

- 1) Core intelligence infrastructure and digital architecture – encompassing foundational frameworks for investment decision-making, stakeholder engagement platforms, and ICT governance.

- 2) Intelligence products and insight dissemination – including trend analyses, dashboards, market reports, and knowledge syndication mechanisms.
- 3) Advanced tools and applied intelligence – covering traveller behaviour tracking, brand sentiment studies, and segmented insight systems.
- 4) Strategy, evaluation, and performance tools – focused on toolkits, audience segmentation systems, organisational evaluations, and insight-driven planning mechanisms.

These clusters frame the assessment that follows. The narrative draws directly from the five APPs, ARs, dashboards, evaluation instruments, and ExCo reports, ensuring full alignment with the technical evidence base and compliance with the 2022 DPME End of Term Review Guidelines.

Together, the outputs under this sub-outcome provided the analytical foundation for South African Tourism’s performance tracking, stakeholder engagement, and digital governance. They also contributed directly to the organisation’s delivery maturity by reinforcing strategic alignment, enabling real-time decision-making, and embedding evidence-informed improvement into the planning lifecycle.

12.3.1. OUTPUT CLUSTER 1: CORE INTELLIGENCE INFRASTRUCTURE AND DIGITAL ARCHITECTURE

This cluster focused on strengthening SA Tourism’s foundational intelligence infrastructure and digital systems to support evidence-informed decision-making, internal governance, and stakeholder engagement. The four outputs in this cluster reflect the organisation’s efforts to embed investment logic, digital governance, analytics integration, and platform consolidation into its operational architecture.

Delivery of the MPIF marked both a strategic response to pandemic-era uncertainty and a forward-looking recalibration of investment principles. The framework was delivered in FY2020/21 as a foundational decision tool and revised in FY2024/25 to align with the 2030 strategic outlook. The updated MPIF 2030 reintroduced segmented market categories (Defend, Growth, Watchlist) and cost-per-acquisition benchmarks. Although the initial rollout was delayed by COVID-19 disruptions, the revised version embedded more rigorous econometric modelling. It now functions as SA Tourism’s primary guide for campaign resourcing, geographic targeting, and investment logic. Evidence demonstrates the institutionalisation of the MPIF, though full integration with marketing analytics dashboards and ROI tracking systems remains a forward priority.

The digital platform overhaul, fully delivered in

MPIF: FROM STRATEGY TOOL TO SYSTEMIC DRIVER

“We need to stop reinventing priorities and start reinforcing them.”

- Strategy planning workshop, 2024

The MPIF, introduced in 2019 and recalibrated after COVID-19 in 2020, was designed to align platform selection and market investment with strategic segmentation logic. By 2024, the “Defend–Grow–Watchlist” model had become a recurring feature in planning presentations and stakeholder briefings.

Yet evaluations and ExCo reflections across the 2020 – 2025 cycle highlighted persistent underuse. Despite its conceptual strength, the MPIF had not been fully embedded into campaign commissioning, budget allocation routines, or dashboard tracking.

Tactical decisions often defaulted to legacy practices or external pressure rather than MPIF tiers.

The current Strategic Planning Framework formally integrates MPIF into quarterly reviews, with clearer guidance on application, accountability, and performance signals. The lesson: frameworks alone do not drive change; institutionalisation happens when tools shape behaviour. MPIF’s future value depends not on its logic, but on its leverage.

FY2020/21, unified SA Tourism's web presence under www.southafrica.net. This was a critical enabler during the early pandemic period, consolidating fragmented portals and launching COVID-19-responsive content. Post-MTR years (2022 - 2025) saw a shift from static redesign to dynamic enhancement. Features such as VTSD tagging filters, partner-specific content syndication, real-time curation, and visitor profiling tools were progressively introduced. In FY2024/25, analytics modules were activated to support embedded insight generation across platforms. While the redesign met early performance targets, it was not formally tracked after 2021, resulting in missed opportunities to assess trend evolution and stakeholder adoption at scale. Nonetheless, the platform remains SA Tourism's global digital anchor, and ExCo confirmed its enhanced functionality and strategic value.

The ICT Governance Framework, introduced in FY2022/23, addressed longstanding gaps in digital oversight, asset management, and risk control. Developed as part of a structured three-year roadmap, the framework was implemented across FY2023/24 and FY2024/25, delivering improved cybersecurity protocols, cross-unit system integration, and ExCo-aligned governance reporting. Internal reviews highlighted reduced infrastructure risk and stronger policy coherence. However, the framework's late introduction meant it was not tracked during the first half of the strategic cycle, limiting longitudinal analysis. The roadmap approach proved effective in delivering consistent milestones and is now recommended for continuation into the next cycle, linked to governance KPIs and annual audit reviews.

The final focus area - the digital stakeholder and analytics platform - experienced significant volatility. While a base B2B portal was delivered in FY2020/21, the FY2021/22 rollout faltered due to procurement irregularities, prompting reputational and operational setbacks. From FY2022/23, the platform was redesigned as part of a new three-year roadmap, repositioned not just as a portal but as a full stakeholder intelligence ecosystem. By FY2024/25, roadmap milestones had been achieved, including audience segmentation functionality, enhanced ExCo dashboard reporting, and integrated stakeholder profiling tools. ExCo confirmed that the restructured platform significantly improved campaign metric tracking and usage data visibility. Despite early disruption, the long-term recovery and performance trajectory of this tool illustrate the benefits of milestone-based implementation, ExCo oversight, and analytics-driven stakeholder engagement.

Across the areas of work, performance was marked by a clear distinction between the pre- and post-MTR eras. The first half of the strategic cycle was defined by ad hoc delivery, platform fragmentation, and governance gaps. The second half saw a maturing digital architecture supported by structured roadmaps, improved internal ownership, and alignment with organisational priorities. Evaluation feedback confirmed that stakeholder-facing tools - especially those linked to VTSD content, analytics dashboards, and ExCo reporting - began to close the loop between execution, performance and insight.

Strategically, this work confirms that intelligence infrastructure is not just a back-office function, but a core enabler of performance, visibility, and organisational maturity. It also reveals the risks of under-tracking critical platforms: several tools exceeded expectations but lacked formal indicators in the APPs, weakening trend insight and accountability. The next strategic cycle must correct this by integrating platform health, user analytics, and digital governance into the core indicator suite.

In FY2024/25, additional functionality was introduced across intelligence platforms to support sustainability signal visibility, including VTSD tagging, responsible tourism content indexing, and stakeholder analytics on sustainability perception. These enhancements reflected a conscious alignment with SA Tourism's evolving sustainability posture and should be tracked explicitly under the digital ecosystem KPIs in the next strategy cycle.

12.3.2. OUTPUT CLUSTER 2: INTELLIGENCE PRODUCTS AND INSIGHT DISSEMINATION

This output cluster focused on strengthening SA Tourism’s organisational ability to generate, publish, and disseminate high-frequency intelligence across the sector. It encompassed performance monitoring, market updates, thought leadership content, dashboard visualisation, and structured dissemination through partner and public platforms. Together, these outputs aimed to institutionalise timely, credible, and usable intelligence as a public good - informing not only internal strategy, but also national tourism dialogue, partner alignment, and public value creation.

Early delivery in FY2020/21 was dominated by crisis-response needs. In that year, SA Tourism exceeded its target by publishing 28 short-form insight products - including COVID-19 infographics, real-time market snapshots, and responsive alerts, against an APP target of 23. These outputs helped to fill an acute knowledge gap during the pandemic. However, the format was not retained as a standalone APP indicator in subsequent years, and while dissemination activity continued, its formal visibility declined due to shifting indicator structures. By 2023, these short-form insights were embedded within broader products such as trend reports and dashboards, but the loss of standalone tracking created a discontinuity in trend visibility and strategic recognition.

Sector performance reporting, initially planned as an annual deliverable, was only achieved in FY2021/22, with the FY2020/21 report missed and subsequent years not yielding tracked outputs. The absence of continuity and institutionalisation meant that one of SA Tourism’s potentially most influential annual outputs remained under-leveraged for much of the review period. This performance gap points to the need for protected delivery capacity and routine release cycles in future APPs.

The performance landscape improved significantly in the post-MTR period. From FY2023/24, SA Tourism consolidated its intelligence outputs into three core formats: trend reports, thought leadership publications, and analytics dashboards. These products were published at a high frequency and with growing strategic relevance. Over 45 such outputs were issued across FY2023/24 and FY2024/25 alone - far exceeding informal expectations and signposting a major leap in organisational maturity. Notably, the KPI dashboards evolved into the organisation’s primary sector reporting mechanism, with quarterly visualisations tracked at ExCo and used to inform campaign calibration, stakeholder briefings, and provincial planning.

These achievements, however, were not always visible in formal APP structures. The lack of pre-MTR indicators for dashboards, strategic publications, or stakeholder briefings meant that delivery success remained under-reported for much of the cycle. While the MTR flagged this gap and recommended consolidation, only in the outer years were these formats institutionalised as part of the intelligence rhythm.

Partner dissemination and syndication also progressed markedly from 2023 onward. Earlier dissemination efforts - limited to reactive briefings and fragmented media responses - gave way to a more structured

IF WE DON'T TRACK IT, IT DIDN'T HAPPEN: WHY SYSTEMS ALONE AREN'T ENOUGH

“There is a difference between having a tool and using it strategically. Too many reports still live and die in the inbox.”

- External evaluator, Programme Evaluation, 2024

By 2024, SA Tourism had made significant strides in building its performance ecosystem: evaluations were more frequent, dashboards more available, and frameworks more standardised. But as one evaluator noted, the real test was not access, it was uptake.

Several business units still treated reports as compliance artefacts, not decision tools. While frameworks existed, the instinct to reflect, adapt, and apply remained uneven. This disjuncture highlighted a deeper cultural challenge: that organisational learning is less about infrastructure and more about habits of mind.

For SA Tourism, the insight is clear - performance systems only matter if they shape strategy. And evaluation only drives value when insight informs choice.

model of stakeholder engagement. SA Tourism re-established provincial and media partnerships, hosted stakeholder briefings, and embedded intelligence tools in public-facing portals. Global Trends Reports and KPI dashboards were regularly distributed, and reviews indicated improved usage among ExCo and provincial stakeholders.

Evaluation evidence confirmed this transition. 2024 performance reports validated the production and utility of over 45 trend and dashboard outputs in the final two years. Stakeholder feedback corroborated their relevance and accessibility, particularly in guiding investment decisions and strategic alignment. Internal dashboard reviews affirmed increased engagement and usage patterns, with ExCo highlighting KPI dashboards as critical to performance tracking and campaign agility.

Nonetheless, gaps persisted. Sector performance reporting lacked continuity, and there were no consolidated dissemination metrics for reach, impact, or usage. Short-form intelligence remained untracked as a distinct output post-2021, despite continued production. In addition, partner dissemination frameworks were not fully formalised - no structured Knowledge Partnership Framework was established to govern reach, audience alignment, or uptake metrics.

Notably, from FY2023/24, thought leadership content and global trends reports began to incorporate themes related to climate-resilient destinations, ethical tourism narratives, and traveller expectations around sustainability. These outputs served a dual purpose: enhancing SA Tourism's reputational positioning and signalling its strategic shift toward values-based brand stewardship.

Overall, this cluster's trajectory reflects a transition from reactive insight production in the early pandemic years to structured, high-volume, and strategically aligned intelligence platforms in the post-MTR phase. The key lesson is clear: performance visibility must keep pace with delivery. SA Tourism's ability to produce quality insights is no longer in question; the challenge is now to formalise these as permanent APP outputs, supported by reach and usage indicators, and anchored in a national knowledge system. A formal dissemination tracker, routine dashboard review cycles, and a Knowledge Partnership Framework should now be embedded in the 2025 – 2030 cycle to ensure that intelligence serves as a sustained driver of sector alignment, transparency, and impact. These mechanisms should include integrated stakeholder tracking tools and audience-specific distribution metrics, enabling greater insight into how intelligence products are accessed, interpreted, and applied.

12.3.3. OUTPUT CLUSTER 3: ADVANCED TOOLS AND APPLIED INTELLIGENCE

This cluster represents SA Tourism's progression toward more sophisticated, predictive, and segment-sensitive intelligence systems, supporting Strategic Outcome 2 by anchoring decision-making in longitudinal evidence and traveller behaviour analytics. While earlier years of the strategic period saw intermittent and reactive intelligence generation, the post-MTR period catalysed the development of advanced tools designed to monitor sentiment, measure brand perception, and segment behavioural insights for targeted execution. Three performance elements were tracked across the five-year period: market readiness insight reports, traveller sentiment tracking surveys, and longitudinal brand intelligence.

The first area of work - market readiness insight reports - was fully delivered in FY2020/21, with three distinct studies focused on India, China, and Africa air markets. These reports were developed in response to bilateral air access opportunities and re-opening strategies during the pandemic, forming part of SA Tourism's go-to-market evidence base for under-tapped, high-potential destinations. However, the initial success was not sustained. No further updates were produced in subsequent years, despite shifting air connectivity dynamics and the emergence of new aviation partnerships. This limited the currency and relevance of market-specific intelligence, a gap later flagged in internal evaluations and stakeholder workshops.

The second focus - tourism tracking surveys - was institutionalised only in the final two years of the strategic cycle. In both FY2023/24 and FY2024/25, five tracking surveys were implemented annually, generating quarterly insights on traveller sentiment, intent to convert, brand favourability, and experience expectations. This marked a significant improvement from the pre-MTR period, where no such reports were published, and where the MTR had identified stagnation in insight generation and a lack of evaluative baselines. The implementation of these surveys allowed SA Tourism to monitor changes in market perceptions in real time and enabled greater agility in campaign design and proposition packaging.

The third and most structurally significant work area was the progressive institutionalisation of longitudinal brand perception and behaviour intelligence. This began with the commissioning of a Brand Tracker prior to the MTR but lacked continuity and formal integration in FY2021/22 and FY2022/23. From 2023 onward, however, a multi-year Brand Equity Study was scaled to cover 18 priority markets, capturing loyalty indicators, repeat visitation proxies, and perception shifts disaggregated by traveller type and campaign segment. These insights were progressively aligned with the NPS system and integrated into dashboard visualisations and audience tracking tools to inform strategic reviews and content refinement.

WE'RE NOT JUST MEASURING ANYMORE - WE'RE LEARNING

"We used to chase compliance. Now we want to use data to ask better questions."
- Strategic Planning Workshop, 2024

Over the course of the strategic cycle, SA Tourism's relationship with data shifted from routine reporting to active learning. By FY2023/24, the rollout of the Performance Information Framework introduced common indicator definitions, cross-programme dashboards, and learning review protocols.

ExCo began applying these tools not just to verify delivery, but to interrogate value. Campaign debriefs, performance workshops, and evaluation feedback loops helped translate numbers into insight - and insight into adjustment. Internal reflections repeatedly noted that strategic alignment improved when measurement was framed as enquiry, not audit.

This evolution was cultural as much as technical. Learning became a performance expectation. And in a high-stakes delivery environment, the ability to diagnose in real time becomes as important as planning in advance.

Despite this post-MTR progress, several limitations persisted. The early discontinuities in brand tracking created gaps in trendline analysis and evaluability. Indicators for loyalty and repeat visitation remained informal, with no formalised APP tracking or structured reporting in the five-year cycle. Additionally, while segmentation was increasingly applied - by youth, leisure, business, and long-haul categories - this was not standardised across outputs, reducing comparative insight and dashboard alignment.

Nonetheless, organisational evaluations and stakeholder feedback strongly endorsed the expanded brand intelligence capability. Integration evidence in ExCo dashboards, brand equity studies, and ARs confirmed that sentiment analytics and behavioural tracking had improved campaign attribution, while ExCo reporting noted enhanced market calibration and investment logic alignment. Stakeholder consultations called for even deeper segmentation, integration with international perception indices, and stronger links between behavioural insights and tactical activation.

Strategically, this cluster signalled a transition from static descriptive analysis to dynamic, applied intelligence. It enabled a more nuanced understanding of how global and domestic audiences responded to SA Tourism's messaging, experience promises, and value propositions. To fully realise this potential, future strategic cycles must institutionalise these tools within the APP framework, formalise annual update cycles for insight reports, and consolidate all behavioural intelligence into a unified Brand and Market Intelligence Index. This would complete the transition to a fully insight-led organisation capable of aligning perception, motivation, and conversion across the tourism value chain.

12.3.4. OUTPUT CLUSTER 4: STRATEGY, EVALUATION, AND PERFORMANCE TOOLS

This cluster assesses SA Tourism's organisational progress in strengthening the analytical and evaluative instruments that support evidence-based delivery. It included five outputs: the digital content toolkit; brand equity and perception tracking; the SANCB intelligence system; trend analytics and dashboards; and evaluation instruments for campaigns, events, and platforms.

Initial capability development was largely reactive, and crisis driven. The Digital Content Toolkit, developed in FY2020/21, played a central role in early pandemic-era campaigns by providing a bank of curated assets to support rapid global and domestic messaging. However, the toolkit was not tracked after delivery and lacked performance metrics or formal refresh cycles in subsequent years. A revised content asset model began to re-emerge only in FY2023/24, as part of the localisation strategy, but remained outside the APP framework.

By contrast, the Brand Equity and Reputation Toolkit emerged as a fully institutionalised instrument post-MTR. Introduced through pilot studies in 2023, covering 10 markets, and scaled to 18 markets in 2024, the tool provided reliable sentiment and perception data to guide campaign design, audience alignment, and brand performance management across both leisure and business lines. Though not listed in the APPs, the toolkit became a critical element of global brand stewardship and was referenced in ExCo reporting and campaign reviews. Evaluations from 2023 - 2025 confirmed its value, and stakeholder feedback pointed to a measurable reputational rebound in core source markets.

The Business Events Intelligence and Tracking System, led by the SANCB, evolved from a limited ICCA-aligned lead tracker into a robust bid pipeline and intelligence system. From 2023 onward, it integrated bid quality filters, sector attribution metrics, and source channel tagging. These advances were not tracked through APP indicators but reflected a significant maturity gain in business events ROI visibility. Stakeholder consultations and ExCo reflections underscored the importance of formally embedding enterprise engagement and lead tracking KPIs into future planning cycles.

Organisational performance also improved significantly in relation to trend dashboards and analytics platforms. Prior to 2022, trend data was fragmented across business units, lacked standard formats, and was not consistently shared internally and externally. From 2023, SA Tourism institutionalised quarterly ExCo dashboards, trend analysis decks, and regional performance summaries. These were used not only in strategic planning but also to inform campaign adaptation, VTSD targeting, and stakeholder engagement. Stakeholder commentary recognised the dashboards as game-changers for insight-led agility and called for permanent integration into annual planning tools.

Finally, the cluster marked a breakthrough in the institutionalisation of an evaluation system. Before 2022, evaluation was sporadic, underfunded, and lacked formal protocols. Post-MTR, SA Tourism embedded structured evaluation tools and feedback loops across its platforms and campaigns. Between 2023 and 2025, formal post-event evaluations were conducted for Africa's Travel Indaba, Meetings Africa, Sho't Left, global brand campaigns, and internal governance platforms. These were supported by dedicated budget lines, standard templates, and ROI translation mechanisms. The 2023 - 2025 evaluation reports confirmed evaluation's shift from an afterthought to a strategic governance tool.

Despite these gains, several constraints remained. The digital toolkit was not tracked beyond its initial delivery, brand equity tracking was not planned prior to 2023, and lead tracking systems, such as the SANCB event pipeline, evolved without formal baseline indicators. Evaluations prior to 2022 remained undocumented, and indicators were often retrofitted to ad hoc tools rather than designed from the outset. These gaps underscore the importance of formalising all strategic tools within future APPs.

The organisational lesson from this cluster of work is clear: SA Tourism's analytical and evaluation capacity

matured significantly in the post-MTR period, but now requires formal indicator alignment, structured review cycles, and full budget integration. In FY2024/25, sustainability considerations began influencing the content structure of evaluation templates and trend dashboards. ExCo confirmed that new ROI frameworks integrated responsible tourism dimensions, including inclusive impact proxies and ethical engagement signals. Going forward, the organisation should consolidate these tools into a Performance Insight Framework in the next five years. This framework should link audience intelligence, campaign tracking, trend analysis, and evaluation learnings into a single organisational performance system, ensuring that insight is not only generated but consistently applied.

12.3.5. RELEVANT TOURISM INTELLIGENCE AND DIGITAL ECOSYSTEM – SYNTHESIS AND STRATEGIC REFLECTION

Between 2020 and 2025, SA Tourism's organisational capacity for insight generation, digital enablement, and evidence-based decision-making shifted decisively from fragmented experimentation to structured, systematised delivery. The four output clusters under this sub-outcome collectively transformed the organisation's ability to plan, measure, and adjust performance in real time. What began as a set of ad hoc responses to pandemic-era uncertainty matured into a foundational intelligence and digital ecosystem embedded in core governance and strategic planning processes.

At the heart of this transformation was a recalibration of SA Tourism's internal logic - from operational delivery to strategic enablement. The overhaul of www.southafrica.net in FY2020/21, followed by the multi-year evolution of stakeholder platforms and embedded analytics, established a unified architecture for content syndication, stakeholder tracking integration, and ExCo-aligned performance dashboards. Organisational digital governance was codified through phased ICT implementation roadmaps, while the MPIF revision introduced econometric prioritisation and cost-of-acquisition logic into investment planning. These shifts enabled the organisation to move from reactive spending to strategic resource alignment.

Equally significant was the post-MTR institutionalisation of structured intelligence products. Trend reports thought leadership publications, and sector KPI dashboards - informal before 2022 - were standardised and scaled in the final two years, exceeding delivery expectations and enhancing internal decision-making, external credibility, and partner confidence. Short-form insight products, while no longer separately tracked post-2021, were integrated into these high-value formats, reinforcing the organisation's capacity for rapid response and stakeholder alignment.

Crucially, behavioural analytics, brand sentiment tracking, and evaluation tools became central to SA Tourism's performance ecosystem. Tracking surveys and brand equity instruments, previously underutilised or fragmented, were institutionalised post-MTR across 18 markets, and aligned to audience segmentation, campaign design, and investment logic. The SANCB lead tracker evolved from a static intake spreadsheet into a qualified pipeline system with attribution and performance insight capabilities. Evaluation frameworks were embedded across Africa's Travel Indaba, Meetings Africa, Sho't Left, and global campaigns, with outputs now used to inform ROI measurement, strategic reviews, and budget justification processes.

The sub-outcome's overall performance - audited in 16 outputs and supplemented by verified post-MTR systems - demonstrated strong alignment with Outcome 2. It enhanced governance responsiveness, digital visibility, strategic learning, and evaluability. Critically, it enabled measurable progress across the Outcome Indicator dimensions in D.11: digital architecture maturity, insight dissemination, evaluation system integration, and reputational evidence all showed marked post-MTR improvement. Organisational ownership of insight generation also strengthened, with increasing cross-programme application and stakeholder utility.

Nonetheless, legacy gaps remained. Pre-MTR years suffered from fragmented tracking, lack of indicator continuity, and limited integration of tools into the APP and budget frameworks. Some intelligence tools, such as the digital content toolkit and SANCB lead pipeline, while operationally mature, lacked formal indicator baselines and consistent monitoring. Several short-form or rapid response tools were absorbed into broader outputs without visibility. These limitations highlight the importance of embedding all strategic tools in the next five years. This includes sustainability-aligned content formats, sustainability-sensitive segmentation, and responsible tourism indicators within dashboards and platforms. The organisation's evolving sustainability posture should now be embedded into its intelligence systems as a routine component of performance tracking and insight dissemination.

Ultimately, Sub-Outcome 2.1 validated a second pillar of SA Tourism's Theory of Change: that robust intelligence systems and digital architecture are prerequisites for strategic governance and responsive delivery. As the organisation shifts into the 2025 - 2030 period, this sub-outcome provides the bedrock for integrated planning, insight-led activation, and performance accountability. The next challenge - explored in Sub-Outcome 2.2 - is whether this enabling platform successfully translated into reputational gains, trust restoration, and corporate credibility.

12.4. SUB-OUTCOME 2.2: CORPORATE REPUTATION

This sub-outcome addresses SA Tourism's organisational credibility, audit compliance, stakeholder trust, and ethical conduct. It underpins Strategic Outcome 2 by reinforcing governance legitimacy and organisational integrity as prerequisites for public value creation and cooperative sector alignment. Its performance signals whether the organisation was perceived as accountable, transparent, and trustworthy across both internal and external audiences.

As set out in Part B, Sub-Outcome 2.2 was not presented as a discrete output area in the original Five-Year Strategic Plan, but it emerged organically through successive APPs and was formalised post-MTR as a critical component of the organisation's results logic. Together with Sub-Outcome 2.1, it operationalises the organisation's governance architecture, but whereas 2.1 focused on systems, intelligence, and digital enablement, 2.2 focuses on conduct, perception, and legitimacy.

Delivery was led primarily by:

- Programme 1: Corporate Support, including audit, risk, compliance, governance, and internal stakeholder systems and culture initiatives.
- Programme 2: Business Enablement, which supported delivery through perception tracking tools, reputation analytics, and stakeholder insight platforms.
- All business units, which were required to contribute to ethical conduct, governance participation, internal alignment, and reputational integrity through values-driven practice and operational compliance.

The sub-outcome's evolution was marked by two distinct phases. The first (2020 - 2022) was defined by fragmented governance efforts, declining staff sentiment, and limited reputational coherence. The second (2023 - 2025) was catalysed by the MTR, which identified weaknesses in consequence management, stakeholder visibility, and organisational culture. The organisational response to these findings included the formalisation of ethics systems, evaluation-backed integrity dashboards, and a culture transformation programme centred on values alignment and leadership accountability.

To assess performance, this sub-outcome is structured into three evidence-based output clusters:

- 1) Governance, compliance, and risk management – focused on audit implementation, risk maturity, ethical conduct, enterprise risk management, and budget optimisation.
- 2) Organisational culture, engagement, and internal brand – centred on staff engagement, values alignment, organisational development, and internal brand trust.
- 3) Stakeholder engagement and corporate brand – addressing public and partner confidence through stakeholder dialogue, reputation campaigns, provincial partnerships, and sentiment tracking.

These clusters structure the performance story that follows. They draw directly on the five APPs, ARs, OPCA dashboards, evaluation instruments, internal engagement surveys, and ExCo governance reports. All outputs have been verified.

This sub-outcome constitutes the final building block in SA Tourism's 2020 - 2025 delivery logic. It provides the reputational foundation for the organisation's broader strategic work - validating whether performance was not only achieved but also trusted, whether systems were not only built but respected, and whether governance mechanisms translated into public and sector confidence. The following sections assess how this reputational foundation was constructed, what constrained its effectiveness, and what strategic insights can be drawn as SA Tourism enters the 2025 - 2030 period.

12.4.1. OUTPUT CLUSTER 1: GOVERNANCE, COMPLIANCE, AND RISK MANAGEMENT

This output cluster assessed SA Tourism's delivery performance on audit implementation, compliance culture, risk maturity, and the organisational architecture of corporate integrity. It represents the operational foundation of reputational performance and was directly responsible for upholding the credibility of governance oversight across the organisation.

The five-year trajectory of this cluster reflects both structural weaknesses and organisational reform. In the early years (2020 - 2022), performance was uneven. Although a high audit resolution rate of 95% was recorded in FY2020/21 and a plan was in place for full implementation in FY2021/22, performance declined to 73%, with Internal Audit and Audit and Risk Committee (ARCO) records flagging bottlenecks various business units. Consequence management protocols were inconsistently applied, and risk maturity assessments were either delayed or not done. No structured enterprise risk management (ERM) or ethics programme had been embedded by that stage.

FROM RECOMMENDATION TO RESOLUTION: TRACKING AUDIT CLOSURE AS AN ORGANISATIONAL DISCIPLINE

"A clean audit is a moment. Closure tells you whether people actually followed through."
- Internal Audit Executive, ExCo Review

In 2024, as audit closure delays began affecting reputational confidence, SA Tourism re-examined what audit discipline truly signals. Reflection sessions with governance teams revealed a growing consensus: compliance is not credibility unless it is sustained, consistent, and traceable to leadership follow-through.

The real reputational test, they argued, was not the audit outcome itself - but how the organisation responded to findings, tracked resolution, and created visible accountability. This reframed closure not as an administrative task, but as a trust signal: a reflection of whether commitments were honoured, not just recorded.

For SA Tourism, this became part of a wider organisational insight - that reputation is built through behaviours, not declarations. And governance maturity begins where compliance ends.

A significant inflection occurred after the 2022 MTR, which formally diagnosed weak consequence management, audit dashboard gaps, and fragmented compliance tracking. In response, a reform

programme was implemented from FY2023/24 onward. This included: the rollout of the OPCA Programme, red-flag and escalation dashboards, the introduction of a structured ERM framework with quarterly reporting, and the development of a Budget Optimisation Strategy to manage resource constraints organisationally.

By FY2022/23, audit performance had improved sharply, with 100% implementation of valid audit recommendations achieved. Risk maturity was elevated from Level 2 to Level 3. Ethics promotion in the supply chain domain also gained visibility, with six targeted initiatives delivered annually in FY2023/24 and FY2024/25, including PFMA training. However, audit implementation regressed again in FY2024/25 to 73%, and ARCO records confirmed persistent delays in key business units. While the ERM roadmap was retained, formal risk maturity assessment was again not done in FY2023/24 due to capacity challenges.

The 2024 ExCo Integrity Dashboard was the pivotal governance innovation of this cluster. It enabled real-time tracking of unresolved audit findings, compliance incidents, and reputational risks. Monthly governance huddles and quarterly ARCO briefings created new accountability rhythms. Similarly, the introduction of a whistleblower case tracking system institutionalised ethics escalation and resolution logging, although these cases were not reflected in APP indicators and lacked formal consequence mapping.

Despite late-cycle improvements, structural issues remained. The closure rate for internal audit findings was below 65% in FY2023/24 and only improved to 79% after the Integrity Dashboard reforms in 2024. SCM integrity efforts were not planned nor tracked prior to 2023, and the Budget Optimisation Strategy - though implemented effectively - lacked formal indicators to assess its impact on cost efficiency and delivery trade-offs across Programmes 1 to 5.

Evaluation reports and stakeholder feedback confirmed the high strategic value of this cluster. Governance reports of 2024 highlighted the shift from reactive to anticipatory oversight, while the Staff Engagement Survey of the same year confirmed greater visibility of risk and ethics messaging across the organisation. However, stakeholders also noted limited follow-through and accountability enforcement, especially in resolving repeat findings and embedding risk appetite thresholds into operational decisions.

In strategic terms, this cluster functioned as the organisational stabiliser of the reputational framework. It protected the credibility of SA Tourism's governance posture but also exposed the risk of reputational volatility when performance regressed. The outputs validated in this cluster confirm that ethical conduct, audit integrity, and consequence management were non-negotiable reputational enablers, and that their visibility mattered as much as their resolution.

To institutionalise these gains, future plans must incorporate a consolidated governance dashboard that integrates OPCA, ERM, audit closure, ethics case tracking, and SCM compliance metrics. The audit closure rate should be formalised as a governance KPI, tied to contracts of Executive Managers and quarterly ExCo reviews. A risk maturity improvement target of Level 4 by 2026 should be introduced, with annual diagnostic reviews and risk-adjusted strategic planning cycles.

Together, these reforms will not only consolidate the governance gains made post-MTR but also embed reputational resilience at the core of organisational delivery.

12.4.2. OUTPUT CLUSTER 2: ORGANISATIONAL CULTURE, ENGAGEMENT, AND INTERNAL BRAND

This cluster assesses SA Tourism’s five-year effort to reposition its internal culture, strengthen staff engagement, and align organisational values with corporate brand identity. It focuses on building an organisational environment that fosters morale, trust, cohesion, and ethical performance, in support of long-term reputational credibility. While the Strategic Plan did not define culture change as a core indicator of governance performance, the post-MTR period embedded this cluster as a critical enabler of public value delivery, staff retention, and leadership credibility.

Early performance was shaped by high engagement baselines in FY2020/21, but these rapidly eroded amid leadership turnover, contract instability, and structural change. Staff survey implementation was inconsistent between 2021 and 2023, creating a measurement gap during the most volatile organisational period. This fragmentation was addressed after the MTR, which prompted the launch of a formal Staff Engagement Improvement Plan, a three-year Organisational Effectiveness Plan, and the institutionalisation of Team BEST as SA Tourism’s flagship culture transformation programme.

From FY2022/23 onward, the organisation implemented a layered set of culture-focused interventions. These included anxiety reduction workshops, SmarTHR, peer recognition systems, emotional intelligence training, internal values campaigns, and monthly ExCo-led communication touchpoints. These efforts were supported by structured operating model reforms, leadership benchmarking tools, and the introduction of a culture readiness framework across business units.

Despite measurable progress, especially in FY2024/25, key challenges persisted. Staff engagement scores dropped from 3.75 in FY2020/21 to a low of 2.61 in FY2023/24, driven by communication breakdowns, inadequate feedback loops, and inconsistent values modelling by leadership. Wellness initiatives were sustained across the term but lacked impact metrics, such as links to absenteeism or productivity. Staff survey continuity was also broken in FY2021/22, weakening year-on-year trend analysis.

The 2024 Staff Engagement Survey showed a modest recovery, with scores improving to 3.0 (52.2%). This reflected the cumulative effect of structured organisational development delivery, improved leadership accountability, and expanded culture engagement platforms. Team BEST was widely credited in evaluation reports for rebuilding cross-unit cohesion, aligning behaviour to organisational values, and re-establishing trust through culture labs and champion networks.

TEAM BEST IN ACTION: HOW CULTURE BECAME A STRATEGIC ASSET

“Morale collapsed mid-cycle, but leadership development labs, peer shout-outs, and wellness days helped us believe again. You felt seen – and that changed how people showed up at work.”

- Staff feedback, 2024 Engagement Survey

Team BEST did not start as a flagship. It emerged from a crisis. By 2022, morale had collapsed, engagement scores had bottomed out, and leadership accountability was untracked. The MTR highlighted the cracks. What followed was not a campaign, but a culture system - built through culture labs, peer recognition loops, and leadership maturity modelling, under the Team BEST banner.

Within two years, Team BEST moved from an OD experiment to an organisational workstream. It aligned values to behaviour, embedded internal trust into the brand index, and reframed culture as a performance input. While gaps remained - especially in linking culture to executive KPIs - a critical shift had taken root: staff no longer experienced culture as HR’s domain, but as an organisational discipline.

The success of Team BEST affirmed a vital organisational lesson - that culture, when codified, resourced, and performance-linked, becomes a strategic enabler of trust, cohesion, and execution.

Evaluation findings highlighted the positive reception of recognition systems and wellness interventions but identified ongoing gaps in disaggregated engagement analytics and the absence of a unified culture performance index. Internal brand sentiment improved between 2023 and 2025, as reflected in the Corporate Brand Index, but leadership modelling and performance contract alignment remained underdeveloped.

Going forward, organisational recommendations include formalising a multi-metric Internal Brand and Culture Index - comprising staff engagement, values alignment, and leadership trust - tracked annually through HR dashboards and integrated with APP and ExCo reporting cycles. Wellness and morale efforts must evolve from activity-based programming toward outcome-based measurement using verifiable data, productivity proxies, and absenteeism trends.

The five-year trajectory confirms that organisational culture is not a peripheral concern but a central driver of SA Tourism's organisational integrity and stakeholder trust. By 2025, SA Tourism had transitioned from fragmented morale interventions to a maturing, values-led internal brand system. However, for culture to remain a reputational asset, it must be governed with the same rigour as audit, ethics, and external stakeholder engagement.

12.4.3. OUTPUT CLUSTER 3: STAKEHOLDER ENGAGEMENT AND CORPORATE BRAND

This cluster focused on building organisational credibility and public trust through structured stakeholder engagement, integrated reputation messaging, and the maturation of SA Tourism's brand governance systems. While early intentions were framed in the FY2020/21 APP, implementation in the first half of the period was inconsistent and reactive. Following the 2022 MTR, SA Tourism initiated a strategic shift from compliance-based engagement to a trust-driven brand architecture. From 2023 onward, efforts were increasingly structured under the Corporate Brand Index and brand governance frameworks, embedding stakeholder sentiment, brand alignment tools, and reputational safeguards within organisational routines.

The Stakeholder Engagement Framework, approved in FY2020/21, was not implemented systematically in the years that followed. However, it was reinterpreted and revitalised in the post-MTR period, culminating in the development of a brand-aligned stakeholder roadmap in FY2024/25. Strategic engagement events were heavily weighted toward FY2020/21 (49 engagements) and FY2024/25, with notable implementation gaps in the mid-term years. This reflected a loss of indicator tracking in 2022 and 2023, when stakeholder KPIs were dropped from the APP cycle.

The Corporate Brand Index, launched in 2023, served as a foundational tool in rebuilding stakeholder trust. It introduced disaggregated sentiment tracking for internal and external audiences and provided the first organisational mechanism for measuring perception across priority stakeholder groups. Trust messaging, while absent from formal APP indicators, was progressively embedded into campaign platforms, crisis responses, and reputational narratives. Tools such as the "Live Again" campaign (FY2022/23), visa policy briefings, and strategic messaging at Africa's Travel Indaba and WTM served to reposition SA Tourism's leadership visibility and values.

In FY2024/25, SA Tourism's reputation management function also began integrating sustainability-aligned messaging into stakeholder and brand platforms. Campaigns, trade briefings, and governance presentations progressively reflected the values outlined in the Integrated Tourism Brand Strategy - 2029 and the emerging sustainability framework. ExCo feedback and stakeholder forums noted the reputational value of responsible tourism positioning, including messaging on inclusive growth, climate resilience, and ethical brand purpose.

Collateral development and messaging alignment - previously unplanned - were delivered post-MTR as part of the Corporate Brand Index implementation. Decks were standardised for provincial briefings, trade engagements, and governance platforms, supporting a unified brand narrative. Reputational tools were supported by the growing institutionalisation of provincial MoUs, initially 95% implemented in FY2021/22, later integrated into delivery dashboards by FY2024/25, further aligning SA Tourism's stakeholder presence to brand governance outcomes.

Internal brand trust emerged as a reputational performance indicator only in 2023, measured via the Corporate Brand Index. It revealed modest gains in staff confidence and perception of leadership integrity, but its late introduction limited time-series analysis. A key enabler of reputational responsiveness was the escalation protocol introduced in FY2023/24 via the ExCo Integrity Dashboard. This system tracked and responded to 12 high-risk incidents across the final two years - including visa policy fallout, board transitions, and fiscal constraints - supporting proactive reputation management and stakeholder assurance.

The evaluative evidence base, including the programme evaluations, Corporate Brand Index reports, and stakeholder dialogue reports, confirmed a decisive organisational pivot toward structured reputation management. However, limitations remained. The lack of formal KPIs for trust messaging and the late tracking of internal stakeholder sentiment constrained SA Tourism's ability to measure progress holistically. Stakeholder feedback cited visible improvements in messaging, transparency, and engagement platforms, but also flagged gaps in national narrative shaping and leadership inclusion.

To reinforce this trajectory, the review recommends the institutionalisation of a Stakeholder Confidence Index, integrated into the Corporate Brand Index, and tracked annually through ExCo dashboards and stakeholder feedback tracking tools. Trust and reputation performance cannot be driven by communications alone. While trust messaging should be codified within the Communications Strategy, it must be underpinned by organisational behaviour, audit performance, and stakeholder responsiveness. KPI tracking should therefore integrate sentiment outcomes such as Brand Equity and NPS, alongside governance and ethics metrics to reflect the full basis of institutional credibility. MoUs must be retained as accountability mechanisms, with quarterly reporting on co-delivery outcomes per province. Finally, internal brand trust should be triangulated with HR, audit, and ethics data to embed integrity across the organisational performance ecosystem.

BRAND IS HOW YOU SHOW UP: TRUST AS A BEHAVIOURAL METRIC

"The national tourism brand isn't only the logo – it's how SA Tourism treats people, keeps promises, responds to issues."

- Stakeholder, SA Tourism Brand Index Survey, 2024

The 2024 Brand Index results revealed a shift in how stakeholders perceive brand value.

Beyond marketing outputs, reputational credibility was increasingly tied to behavioural attributes: consistency, transparency, responsiveness, and intergovernmental partnership.

Stakeholders highlighted the impact of SA Tourism's growing visibility in planning forums, proactive communication on campaign decisions, and responsiveness during crises - all of which deepened trust and elevated brand legitimacy.

For SA Tourism, this insight affirms that reputation is no longer earned through messaging alone. Brand performance is governance performance, and how organisations behave is as visible as how they market.

12.4.4. CORPORATE REPUTATION – SYNTHESIS AND STRATEGIC REFLECTION

Between 2020 and 2025, SA Tourism's reputation management efforts evolved from isolated compliance measures and reactive stakeholder communication into a more integrated, strategic platform for public trust, ethical governance, and organisational visibility. The work areas under this sub-outcome sought to collectively reinforce the credibility of SA Tourism as a public organisation - not only in terms of its audit

record and compliance posture, but in how it cultivated internal culture, shaped stakeholder narratives, and responded to reputational risks.

While governance remained a consistent focus throughout the five-year cycle, the MTR marked a pivotal turning point in SA Tourism's approach to organisational integrity. Post-MTR, the OPCA Programme, enterprise risk maturity model, and internal audit dashboards were introduced as visible mechanisms to accelerate audit closure, manage reputational risk, and embed a culture of consequence management. Despite initial regressions in audit performance in FY2021/22 and FY2024/25, the period FY2022/23 demonstrated the organisation's capacity to achieve full audit recommendation implementation (100%), underscoring the latent potential of structured oversight and dashboard-enabled responsiveness. The introduction of the Integrity Dashboard in 2024, alongside reforms to ExCo oversight cycles, signalled a new model of anticipatory governance within the organisation.

Internally, SA Tourism's organisational culture underwent a slow but deliberate recovery from morale declines in the middle years. Staff engagement scores dropped to a low of 2.3 in FY2022/23 but began recovering in FY2024/25 following the roll-out of a structured OD strategy, peer recognition systems, and values-linked wellness initiatives.

Externally, the period saw a transition from fragmented engagement efforts to a more structured stakeholder trust architecture. High-volume engagements in FY2020/21 and FY2024/25 addressed a mid-cycle gap caused by the removal of stakeholder KPIs from the APPs. However, from 2023, stakeholder dialogue was reactivated through provincial brand briefings, DG forums, and trade platforms, and underpinned by the Corporate Brand Index framework. This index introduced disaggregated stakeholder sentiment tracking, providing the organisation with its first systematic visibility into brand perception, trust dynamics, and reputational risk exposure.

Narrative alignment and strategic messaging also matured in the post-MTR phase. While trust messaging was never codified into a standalone campaign, it became increasingly embedded in SA Tourism's public communications, from tourism recovery narratives and visa policy responses to platform briefings and various dialogues. This cohesion was reinforced by a new layer of collateral and briefing toolkits that tailored messaging to stakeholder groups and brand index performance dimensions. Reputational risk escalation protocols, introduced in FY2023/24, institutionalised the ability to manage high-stakes visibility events, ensuring coordinated responses across governance, communications, and ExCo leadership.

Across all 23 performance elements assessed under this sub-outcome, 17 were delivered in full or substantively implemented. Audit compliance, stakeholder alignment, organisational development, and trust communications were validated through ARs, ExCo dashboards, internal surveys, and independent evaluation instruments. While early-year gaps in tracking and structural fragmentation diluted the visibility of performance gains, the post-MTR reforms created an increasingly resilient and responsive reputational architecture.

Importantly, this sub-outcome affirmed a second critical assumption in SA Tourism's Theory of Change: that organisational trust, ethical consistency, and strategic visibility are prerequisites for external credibility and cooperative governance. The convergence of internal culture, external stakeholder alignment, and brand governance platforms laid the foundation for reputational stewardship as a strategic asset - one that extends beyond compliance into the domain of public legitimacy, delivery assurance, and sector leadership.

As the 2025 – 2030 strategy cycle begins, the challenge will be to deepen the institutionalisation of these gains. This includes embedding reputational metrics into performance contracts, sustaining the integrity dashboard model, and linking stakeholder confidence to both internal values systems and external messaging ecosystems. As sustainability considerations became more visible across stakeholder and reporting platforms in FY2024/25, SA Tourism's reputational stance also began to reflect its commitment

to inclusive, sustainable, and ethical tourism. Sub-Outcome 2.2 has laid the groundwork for this evolution. The next step is to ensure that reputation is no longer treated as a by-product of governance, but as a strategic resource in its own right.

PART E: LESSONS LEARNT AND RECOMMENDATIONS

The End of Term Report 2020 - 2025 confirms that organisational learning is not a by-product of performance measurement, but a strategic enabler of delivery reform. Throughout this reporting cycle, SA Tourism's ability to adapt, recover, and reorient was shaped not only by the content of its plans, but by the quality of its reflection - in evaluations, in strategic reviews, and in governance decision-making. Part E consolidates the most consequential of these lessons, distilling high-value insights from across all four preceding parts of this report.

Each insight presented here has been directly extracted from the verified five-year performance story. They are grounded in formal evidence: from APPs and ARs to stakeholder surveys, ExCo deliberations, programme evaluations, campaign reviews, dashboards, governance reports, and organisational planning, monitoring, reporting, and evaluation frameworks. While each insight is linked to specific sub-outcomes, together they offer a cross-cutting understanding of SA Tourism's delivery maturity, strategic agility, and organisational credibility.

This final section is therefore not a summary of results. It is a bridge to the future. It frames what must be protected, what must be corrected, and what must be embedded in the next five years. Across five thematic learning areas - strategic demand, intelligence systems, governance, organisational culture, and reputational trust - Part E offers forward-focused recommendations designed to strengthen organisational resilience, elevate performance ambition, and embed public value as the core test of success.

These recommendations are aligned not only with the evidence of the 2020 - 2025 cycle, but also with the national policy direction of the 7th Administration. In particular, they reflect SA Tourism's strategic role in advancing the priorities of the Government of National Unity, including inclusive growth, localised economic participation, governance reform, and service delivery acceleration.

Strategic Demand and Platform Learning

From fragmented campaign delivery in the early years to brand-led, insight-informed activations in the post-MTR period, the 2020 - 2025 cycle offered clear lessons on what drives tourism demand, and what undermines it. Performance under Sub-Outcomes 1.1 and 1.2 confirmed that awareness is not enough. To convert demand into visitation and economic benefit, SA Tourism must integrate brand consistency, equity targeting, platform protection, and fulfilment readiness across all stages of the visitor journey.

One of the most significant insights of the cycle was the reputational cost of fragmented brand messaging. The early coexistence of multiple campaign identities - such as #ShareSouthAfrica, Live Again, and disjointed international themes - diluted audience recognition and undermined brand equity. This was addressed post-MTR through the consolidation of domestic and global brand architecture, with the FY2023/24 equity tracker confirming improved recall and message trust. Going forward, the organisation must protect this coherence through a unified brand framework that governs all messaging across markets, to be updated annually and embedded in ExCo review cycles and campaign briefs.

A second critical lesson was the vulnerability of high-value platforms to budget instability and inconsistent delivery. Flagship vehicles such as Sho't Left, signature events, and global trade platforms drove measurable engagement and pipeline activation - but only when supported by clear strategies, stable funding, and audience-aligned content. In the 2021 to 2022 period, gaps in investment and inconsistent

audience targeting weakened platform impact. From 2023, platform-specific evaluations and performance dashboards were introduced to restore consistency. These should now be institutionalised through ringfenced multi-year roadmaps that integrate campaign equity, segment differentiation, and ROI metrics.

Equity-focused programming emerged as a third area of strategic insight. Where VTSD, youth, and seasonality initiatives were integrated into mainstream campaigns, performance on inclusive reach and spatial spread improved. However, once-off or siloed initiatives failed to achieve sustained traction. The Sho't Left Strategic Review confirmed that campaign equity is strengthened when inclusive targeting is embedded in content planning and co-delivery mechanisms, not appended as an add-on. Future campaign planning systems must include a mandatory equity filter, with disaggregated reporting on VTSDs, WYPD, and seasonal outcomes at platform level.

The fourth insight relates to the relationship between digital engagement and actual conversion. High levels of user interaction with digital platforms and social campaigns, particularly from 2022 onward, did not always translate into visitation, especially where infrastructure, affordability, or readiness barriers remained unresolved. This disconnect was most visible in rural and emerging destinations where access constraints undermined lead conversion. To address this, campaign monitoring and evaluation frameworks should incorporate demand fulfilment indicators, while ExCo and programme heads should jointly track alignment between campaign leads, provincial readiness, and experience quality.

A fifth strategic insight relates to SA Tourism's evolving role in access enablement. While airlift, cruise, and visa barriers were not originally part of the 2020 - 2025 programme logic, rising stakeholder concern and missed conversion opportunities led the organisation to engage more deliberately with systemic access constraints. From FY2023/24, SA Tourism initiated structured workstreams on route development, cruise terminal coordination, and intermodal mobility planning. In parallel, SA Tourism partnered with the Departments of Tourism as well as Home Affairs through the Trusted Traveller Oversight System to strengthen sector engagement and coordination on traveller facilitation priorities. These efforts were modest in scale but marked a transition from passive observation to active facilitation. The lesson is clear: demand fulfilment requires not just platforms and content, but access. Going forward, access enablement must be embedded in strategic planning, with indicators, partnerships, and resource streams aligned to facilitate the full visitor journey.

Finally, the FY2023/24 period saw the introduction of innovation tools, interactive itineraries, and user-generated content platforms. While these were positively received, evaluations showed poor adoption across country offices and minimal integration into core delivery systems. The lesson is clear: innovation must be embedded, not piloted in isolation. Future campaign cycles must incorporate innovation scalability plans - including staff training, budgeted refresh cycles, and usage monitoring - to ensure that digital tools support long-term demand generation and audience relevance.

Together, these lessons validate a central strategic principle: that tourism demand is not created by visibility alone. It is generated through sustained, equity-conscious, experience-aligned engagement that

BEYOND OUTPUTS: WHAT GOOD DELIVERY LOOKS LIKE NOW

"We used to count meetings and campaigns. Now we ask: did they change anything? Did we build trust?"

- Stakeholder Interview, 2024 Corporate Brand Index

Over the cycle, SA Tourism's performance logic matured from counting activity to interrogating value. Interviews with partners revealed that outputs alone no longer define delivery. Stakeholders increasingly assessed the organisation by how it listened, collaborated, and corrected, not just how it promoted.

This shift signals a broader trend: in a volatile delivery environment, trust, transparency, and follow-through are emerging as key performance currencies. For SA Tourism, the post-2025 challenge is not just strategic - it is reputational. And reputation, stakeholders insist, is built at the intersection of message and conduct.

moves seamlessly from interest to action. For SA Tourism to deliver effectively in the next five years, campaign success must be redefined not only by reach or impressions, but by the organisation's ability to convert trust into travel, content into conversion, and platforms into inclusive economic opportunity - especially in alignment with the national emphasis on district development, community participation, and localised job creation.

Sustainability and Strategic Alignment

From 2023 onward, SA Tourism began piloting new sustainability-focused initiatives aimed at aligning brand positioning and product experience design with evolving global and domestic expectations around responsible tourism. These efforts were exploratory, not yet systematised, but they offered early lessons on how sustainability could be integrated into tourism demand fulfilment and brand equity strategies.

The most prominent workstreams included the "Sustainable Stories" pilot campaign and the Product Proposition Sustainability Survey, both introduced in 2024. These initiatives did not operate under a formal Environment, Social, and Governance (ESG) or sustainability framework but tested messaging, product positioning, and platform alignment through a storytelling lens. Evaluation of these efforts, alongside ExCo reflections in early 2025, revealed two key insights.

First, sustainability resonates most when grounded in real, credible tourism experiences. The Sustainable Stories pilot found that audiences responded more strongly to locally rooted narratives - highlighting community benefit, conservation, or cultural value - than to generic sustainability messaging. Likewise, the Product Proposition Survey confirmed that sustainability remains inconsistently understood at product level and is not systematically integrated into experience curation or marketing platforms.

Second, while the term "ESG" began to appear in internal discussions post-2023, SA Tourism has not adopted an ESG Framework, and use of the term remains premature and potentially misleading. ExCo confirmed in February 2025 that no ESG governance instrument is in place, and that future strategy documents should use "sustainability" or "responsible tourism" language tied to real delivery systems, not global compliance jargon.

Going forward, SA Tourism must complete the development of a fit-for-purpose sustainability framework tailored to its brand, platforms, and product ecosystem. This framework should be integrated into the 2025 - 2030 Strategic Plan and supported by internal capacity, platform tracking tools, and co-created content pipelines. Sustainability must not sit on the margins, it must be embedded in how the organisation designs, delivers, and communicates demand fulfilment.

Digital Intelligence, Planning and Performance Systems

Over the five-year period, SA Tourism made significant strides in strengthening its digital intelligence architecture, institutionalising performance information management tools, and embedding strategic planning reforms. While the first half of the cycle (2020 - 2022) was characterised by fragmented digital systems, under-leveraged data, and disconnected evaluation efforts, the post-MTR period (2023 - 2025) introduced a deliberate and structured shift toward insight-driven decision-making. This shift was grounded in the rollout of the Strategic Planning Framework, the revised Performance Information Management Framework, and the first full implementation of the Programme Evaluation Framework, all of which were introduced between 2022 and 2024. Together, these frameworks laid the foundation for a maturing organisational performance management ecosystem.

At the level of demand planning and campaign responsiveness, early years suffered from a lack of consolidated insight loops. Tools such as the Brand Tracker, digital analytics dashboards, and NPS indicators existed in partial or pilot forms but were not integrated into a coherent performance feedback system. As a result, campaign monitoring remained largely reactive, limiting SA Tourism's ability to

recalibrate activities mid-cycle or evaluate ROI in real time. From 2023, however, the establishment of a structured Campaign Intelligence Framework began to fill this gap. This included the consolidation of brand, sentiment, audience engagement, and evaluation data into integrated dashboards, which were reviewed quarterly by ExCo and used to inform post-campaign reviews and platform redesigns.

The organisation's broader intelligence infrastructure followed a similar trajectory. The pre-MTR period was marked by multiple failed or underperforming systems, including the discontinued B2B portal (FY2021/22), which highlighted the risks of siloed and uncoordinated digital development. In contrast, the post-MTR period saw the introduction of structured roadmaps under the MPIF, the analytics platform rollout, and the ICT Strategy refresh. These instruments enabled SA Tourism to move from ad hoc platform development to milestone-based delivery, tracked through ExCo dashboards and supported by performance audits. The MPIF, in particular, became central to campaign targeting and investment decisions, offering a defend/grow/watchlist segmentation logic that linked marketing priorities to budget allocations, platform planning, and audience segmentation analysis.

The maturation of SA Tourism's audience analytics and digital engagement tools was another notable gain post-2022. These systems supported lead tracking, partner segmentation, and post-campaign engagement analysis, but full organisational uptake remained a work in progress. Usage varied across business units, and integration into campaign briefs and budget planning was inconsistent. Similarly, key performance metrics such as content engagement, lead conversion, and post-activation retention were not uniformly tracked or reported. Evaluation reports confirmed that digital engagement tools improved targeting and strategic alignment, but called for more formal training, KPI adoption, and change management plans to ensure consistent usage across the organisation.

Insight product design and syndication also improved considerably after 2022. Short-form outputs such as trend infographics, briefing decks, and stakeholder-specific insights replaced the fragmented reporting of previous years. These were well received by provincial partners, trade platforms, and intergovernmental stakeholders. However, evaluation findings flagged that certain product types, particularly short-form visual outputs, remained underutilised. Recommendations included aligning product formats with user needs, linking outputs to distribution analytics, and introducing user feedback loops to improve insight relevance and reach.

Perception and sentiment tracking evolved into a strategic enabler of campaign performance and stakeholder alignment. While the NPS, Brand Equity Tracker, and Brand Index tools gained traction after 2023, these were not yet systematically aligned with APP indicators or used for real-time corrective action. To ensure real-time utility and strategic influence, the consolidated Framework Sentiment Index that was recently finalised will be further operationalised as planned in 2025/26, with quarterly dashboards informing campaign recalibration and ExCo reporting.

The final driver of performance in this theme was the institutionalisation of monitoring, reporting, and evaluation systems. The Programme Evaluation Framework (2022) introduced standardised protocols, ROI tools, and review instruments for major platforms and campaigns. Uptake was strong in some areas - such as Business Events, stakeholder messaging, and digital campaigns. To reinforce governance-based learning, the Programme Evaluation Framework will continue to be backed by a formal Evaluation Oversight Forum with delegated authority to track evaluation use, escalate findings, and align insights to quarterly performance reviews and the annual planning cycle. This function will be managed through the Strategic Planning, Evaluation and Programme Management (SPEPM) business unit as part of its FY2025/26 transversal planning and monitoring and evaluation mandate.

Taken together, the trajectory of this theme confirms that digital intelligence as well as planning and performance systems cannot be bolted on as compliance tools. They must be designed, governed, and embedded as enablers of delivery logic, campaign agility, and organisational learning. By the end of the

period, SA Tourism had moved from fragmented experimentation to an increasingly coherent system of insight generation and strategic planning. To sustain this trajectory, future strategies must ensure that tools such as the MPIF, digital performance dashboards, and the Brand Tracker are not only maintained but upgraded with user ownership, data fidelity, and measurable performance returns.

Finally, the Strategic Planning Framework, Performance Information Framework, and Programme Evaluation Framework - while successfully introduced - must now be elevated to non-negotiable planning and governance tools. Their uptake across the organisation remains uneven, and their integration into planning and reporting cycles should be tracked through a formal Performance, Monitoring, and Evaluation (PME) System Maturity Index. This would enable SA Tourism to fully institutionalise the data, planning, monitoring, reporting, and evaluation architecture needed for performance credibility and learning-based governance in the next strategic cycle and contributing directly to the broader national drive to build a capable, ethical, and developmental state.

Governance, Risk and Organisational Oversight

Between 2020 and 2025, SA Tourism's organisational governance and risk oversight systems evolved from compliance-oriented processes into a more structured and visible architecture of integrity, escalation, and strategic accountability. While foundational instruments such as audit management, risk registers, and ARCO reporting were in place from the start of the cycle, their operationalisation lacked coherence, consequence enforcement, and integration with executive decision-making. The MTR marked a clear turning point, catalysing the introduction of visible mechanisms such as the OPCA Programme, integrity dashboards, and quarterly risk tracking protocols under ExCo and ARCO oversight. These instruments collectively elevated the organisation's ability to anticipate, escalate, and act on governance vulnerabilities in real time.

The performance story in Part D confirmed that while SA Tourism achieved 100% audit recommendation implementation in FY2022/23, performance regressed in FY2024/25 as unresolved findings accumulated in high-risk units including Supply Chain Management, and HR. Internal audit closure rates - untracked prior to 2023 - remained below 65% until the introduction of the ExCo Integrity Dashboard, which drove improvement to 79% by the end of FY2024/25. The experience confirmed that audit resolution velocity, not just audit outcomes, has become a trust signal. To strengthen governance credibility, the Internal Audit Closure Rate should continue to be institutionalised as a transversal performance indicator, linked to FY2025/26 performance contracts and tracked quarterly via ExCo dashboards and through the Human Capital and Remuneration Committee (HCREMCO).

The OPCA Programme and integrity dashboards introduced post-MTR were instrumental in shifting SA Tourism's oversight posture from reactive to anticipatory. Through monthly "governance huddles," red-flag protocols, and reputational risk tracking, the organisation created a new rhythm of integrity-focused leadership engagement. However, these systems remain unevenly integrated with consequence management and do not yet trigger structured executive performance consequences for non-compliance. To preserve their value, OPCA and the integrity dashboards must be retained as core components of the

ETHICS ISN'T A MESSAGE - IT'S A MANDATE

"If your brand says Ubuntu, your governance must reflect it. Otherwise, people switch off."

- Tourism industry respondent, Corporate Brand Index, 2024

One of the most cited contradictions in stakeholder feedback was the gap between brand narrative and perceived ethical posture. Respondents acknowledged SA Tourism's creative strength and emotional resonance but called out reputational risks tied to governance lapses and delayed accountability.

This gap sharpened organisational reflection on the ethics-brand-performance triangle. Strong storytelling cannot compensate for weak systems. Going forward, governance credibility will be as central to SA Tourism's brand equity as destination appeal. The brand promise must be lived - not just launched.

organisation's governance architecture, with annual effectiveness audits, tighter integration into consequence management systems, and alignment to risk appetite thresholds.

Evaluation and stakeholder feedback further confirmed that organisational culture could not recover without visible leadership accountability. Staff engagement and trust rebounded only after structured OD investments - including SmartHR systems and the Team BEST programme - were linked to clear governance messaging and ExCo buy-in. This affirmed a critical insight: values-based leadership is a governance requirement, not a discretionary behaviour. SA Tourism should now introduce a Leadership Maturity Scorecard that formally assesses executive conduct, values modelling, and accountability to audit, risk, and ethics standards. This tool should be tracked quarterly and reported to HCREMCO as a mechanism for leadership reinforcement and reputational assurance.

Strategically, this sub-theme underpins SA Tourism's public credibility and sector legitimacy. Governance performance is no longer judged solely on audit outcomes, but on how visibly and consistently the organisation manages risk, responds to findings, and demonstrates consequence management. The convergence of tools such as the OPCA dashboards, ERM frameworks, and integrity protocols laid the groundwork for a more responsive and trustworthy organisational culture. To complete this shift, governance indicators must be integrated into the next five years, not as compliance outputs, but as strategic enablers of performance credibility and stakeholder confidence.

Ultimately, SA Tourism's 2020 - 2025 experience demonstrates that effective governance requires more than frameworks, it requires leadership discipline, system integration, and real-time escalation. These are not peripheral reforms. They are the backbone of delivery assurance and the organisational logic through which public trust is earned, protected, and sustained - responding directly to the call for governance renewal, institutional accountability, and trust-based public service leadership.

Organisational Culture and Internal Brand Trust

The 2020 - 2025 period exposed the centrality of organisational culture, staff engagement, and internal brand trust as foundational determinants of organisational credibility. SA Tourism's trajectory in this area was uneven and at times fragile, with sharp morale declines in the early years giving way to structured recovery only after 2022. While early planning documents and APPs did not treat culture as a strategic asset, the MTR confirmed its influence on staff retention, delivery capability, reputational coherence, and public trust. From 2023 onward, a formal shift occurred: organisational development was repositioned as a performance driver, and internal brand coherence became a measurable component of the Corporate Brand Index.

The breakdown in culture and engagement during 2021 - 2022 was significant. Staff sentiment scores dropped from 3.75 in FY2020/21 to a low of 2.3 by FY2022/23. This collapse coincided with leadership instability, contract uncertainty, and weak communication loops, which eroded organisational cohesion. Surveys were not conducted in FY2021/22, further limiting SA Tourism's ability to detect and respond to these trends in real time. The absence of formal KPIs for leadership modelling and internal values alignment meant that early warning signs were not escalated or actioned at executive level.

The post-MTR recovery was driven by a layered OD response. The Staff Engagement Improvement Plan and Organisational Effectiveness Plan, launched from FY2022/23, introduced targeted interventions including peer recognition platforms (SmartHR), anxiety reduction workshops, internal values campaigns, and emotional intelligence training. Staff sentiment improved modestly by FY2024/25, with engagement scores rebounding to 3.0, underpinned by stronger cohesion, clearer leadership visibility, and embedded feedback systems.

Despite these improvements, the five-year review confirmed several systemic gaps. Wellness interventions were widely implemented - through wellness days, ICAS utilisation, and emotional wellbeing

sessions - but were not evaluated for impact or linked to indicators such as absenteeism, productivity, or retention. Similarly, internal brand trust was introduced only from 2023 via the Corporate Brand Index, limiting longitudinal analysis of internal confidence trends. Most critically, executive performance contracts remained poorly aligned to culture and ethics KPIs, undermining sustained leadership accountability.

Evaluation reports, staff survey findings, and OD diagnostics all reinforced the strategic importance of treating culture and trust as measurable performance dimensions. Organisational culture, when left untracked, became a reputational liability. When nurtured through structured OD systems, transparent leadership, and values-based communication, it became a lever for organisational resilience, stakeholder confidence, and delivery credibility.

By the end of the strategic cycle, SA Tourism had demonstrated that culture is not an HR function - it is an organisational capability. Its ability to rebuild morale, model values-based leadership, and restore internal trust after a period of instability stands as a strategic lesson with direct implications for the next planning cycle. If internal alignment is sustained, and leadership accountability is codified into KPIs, SA Tourism can consolidate its cultural recovery into a durable asset for organisational legitimacy and public confidence.

Going forward, SA Tourism should institutionalise a multi-metric Internal Brand and Culture Index, comprising indicators for staff engagement, leadership trust, and values alignment. This index must be embedded in annual HR dashboards, reviewed biannually by ExCo, and linked to performance management systems across business units. The Team BEST programme should be retained beyond 2025 as a permanent OD workstream, with refreshed diagnostics, feedback loops, and KPIs linked to cohesion, morale, and cultural readiness. As part of this institutionalisation, a full OD review and implementation project will be rolled out in FY2025/26, ensuring that structure, culture, and performance systems are optimally aligned. Wellness interventions must shift from activity-based programming to outcome-focused tracking, with measurable links to absenteeism, performance, and mental health resilience.

Reputational Leadership and Stakeholder Confidence

Between 2020 and 2025, SA Tourism's approach to reputational leadership matured from episodic, compliance-based engagement into a more strategic and integrated system of trust-building, stakeholder visibility, and brand governance. This evolution was neither automatic nor evenly sequenced. The initial years of the period were marked by fragmented stakeholder outreach, weak sentiment tracking, and a communications model that relied more on reactive messaging than coordinated narrative leadership. The organisational reputation architecture lacked coherence, and KPIs for engagement and trust messaging were dropped from the APPs between 2022 and 2023, leaving a vacuum in performance monitoring.

The 2022 MTR signalled a turning point. Its findings prompted a pivot toward a trust-led organisational strategy, grounded in stakeholder confidence as a measurable, reputational asset. From 2023 onward, SA Tourism introduced several key reforms to realign its engagement posture. The Corporate Brand Index, first implemented in 2023, became the principal diagnostic tool for internal and external trust metrics. Disaggregated sentiment analysis enabled differentiated insights for staff, public, provincial, and trade stakeholders. By FY2024/25, the Index served as a baseline for understanding perception dynamics, linking strategic messaging to stakeholder experience, leadership credibility, and delivery assurance.

Strategic stakeholder briefings re-emerged as a core organisational routine. Provincial dialogues, DG Forums, and trade roundtables provided high-visibility platforms for transparency and reputational repair. These engagements were supported by a newly institutionalised set of stakeholder toolkits, including brand-aligned briefing decks, thematic messaging collateral, and partner-specific content calibrated against Corporate Brand Index findings. Internal brand confidence, which had previously gone unmeasured, was also introduced into the Index methodology, offering insight into morale, leadership trust, and organisational cohesion.

Reputational risk management also underwent structural reform. Between 2023 and 2025, 12 high-visibility incidents were tracked and escalated through the Integrity Dashboard, including visa policy controversies, board transitions, and international safety perceptions. These incidents were managed through cross-functional response mechanisms involving ExCo, communications, and governance leads, demonstrating a new level of anticipatory capacity and narrative agility.

However, several weaknesses persisted. Trust messaging was never codified as a standalone campaign stream and remained fragmented across platforms. Internal stakeholder confidence was measured too late in the period to establish comparative baselines. The absence of a formal Stakeholder Confidence Index, separate from the broader Brand Index, limited organisational ability to track engagement effectiveness across programme areas. Furthermore, sentiment and perception data were not yet fully integrated into planning, reporting, or evaluation cycles, reducing their influence on strategy recalibration.

WHOLE-OF-STATE MEANS WHOLE-OF-SYSTEM LISTENING

“You can’t talk localisation and then ignore the district perspective.”

- Provincial official, Stakeholder Survey 2021

Several provincial and local partners voiced frustration during the first half of the cycle, noting limited consultation and centralised campaign design. These gaps weakened on-the-ground implementation and created disconnects between national brand messaging and destination-level realities.

The shift post-MTR - toward co-created campaigns, intergovernmental briefings, and targeted roundtables - helped repair alignment. But the lesson lingers: strategic coherence depends not only on shared frameworks but also on shared voice. As SA Tourism builds toward 2030, system-wide listening is not just inclusive, it is strategic.

Evaluation reports and stakeholder reflections validated the strategic gains achieved. The Corporate Brand Index and stakeholder engagement platforms were credited with restoring narrative coherence and visibility, especially in the post-MTR years. Provincial partners welcomed the return to structured coordination and called for deeper integration into national messaging and campaign design. Internally, improved leadership transparency and alignment with OD interventions contributed to modest but notable recovery in trust sentiment. Still, these achievements were not always translated into organisational governance systems, and accountability for reputational performance remained uneven.

Looking ahead, SA Tourism must consolidate these gains by institutionalising stakeholder trust as a strategic asset embedded across the planning, delivery, and governance ecosystem. The Corporate Brand Index should be retained as an annual diagnostic, disaggregated by stakeholder type and used in programme performance reviews. A standalone Stakeholder Confidence Index should be developed, combining sentiment, engagement quality, and influence metrics, with quarterly tracking via digital dashboards and stakeholder engagement tools. Strategic trust messaging must be codified through an integrated Brand and Stakeholder Confidence Framework. This must go beyond the Communications Strategy, linking trust-building to audience segmentation, perception analytics, governance conduct, and performance accountability across platforms. Provincial MoUs should remain central to sub-national engagement, with co-delivery milestones formally reported on each quarter. Finally, internal brand trust should be triangulated with HC data, audit compliance, and ethics case tracking to close the loop between governance behaviour and public credibility.

The five-year performance of this domain confirmed that reputation is not the by-product of delivery, it is a core organisational outcome in its own right. Trust cannot be delegated to the communications function alone; it must be governed, tracked, and protected across the entire system. In positioning stakeholder confidence as both a barometer of organisational health and a lever of cooperative governance, SA Tourism has begun to reshape the national tourism narrative from the inside out - affirming its role in advancing the priorities of the 7th Administration: economic inclusion, institutional credibility, intergovernmental partnership, and public sector trust recovery.

CONCLUSION

The End of Term Report 2020 - 2025 set out not only to assess performance, but to test strategic resilience, mandate alignment, and organisational learning across a five-year period marked by profound disruption, reform, and recalibration. Through parts A to E, this review has traced the evolution of SA Tourism from a recovery-challenged, governance-compromised, compliance-based organisation into a maturing strategic entity capable of insight-driven delivery, brand stewardship, and governance innovation.

Part A reaffirmed the organisation's foundational mandate - rooted in the Constitution, sector legislation, and the National Development Plan - and clarified its role as the custodian of tourism demand stimulation and sector alignment. It validated SA Tourism's strategic authority within a broader policy universe, confirming that its delivery must consistently reflect public value, developmental equity, and intergovernmental coherence.

Part B examined the strategic intent that guided this five-year journey. It clarified the organisation's impact and outcome framework, re-traced the amendments made during the period, and presented a maturing results logic shaped by experience, reform, and evaluation. It also highlighted the emergence of sub-outcomes and delivery clusters, which brought sharper operational focus to the organisation's strategic intent post-MTR.

Part C documented the environment in which this strategy was implemented. It demonstrated that global, regional, national, and organisational forces profoundly affected delivery conditions - from pandemic shutdowns and shifting consumer behaviour to fiscal constraints and organisational instability. Rather than using context as a rationale for underperformance, the review positioned it as a backdrop against which strategic adaptation, resilience, and delivery agility must be assessed.

Part D then turned to the evidence itself - presenting, across four sub-outcomes and over 98 output elements, the detailed five-year performance record of SA Tourism. It confirmed that the organisation delivered on some of its performance commitments, particularly in the post-MTR phase. It showed that brand equity, digital intelligence, stakeholder sentiment, governance integrity, and internal trust all improved, not evenly, and not without reversals, but measurably. The analysis also laid bare the costs of system discontinuity, incomplete consequence management, and early-cycle fragmentation in planning and implementation.

Finally, Part E distilled the most valuable organisational lessons and strategic recommendations to carry forward. It confirmed that performance systems matter - but so too do leadership culture, reputational trust, and the ability to integrate insight into strategy. Lessons around campaign coherence, equity mainstreaming, innovation adoption, governance integration, and stakeholder confidence provide a blueprint for what must be sustained and strengthened in the 2025 - 2030 cycle.

Across all five parts, a clear organisational arc emerges: from crisis response to insight-led recovery, from compliance to consequence, and from output delivery to strategic credibility. The review affirms that SA Tourism is no longer simply delivering programmes - it is stewarding a national brand, catalysing sector

recovery, and building a performance ecosystem in which trust, transparency, and transformation are inseparable.

As the next strategic period begins, this End of Term Report leaves the organisation with a sharpened results logic, a codified set of performance lessons, and a renewed mandate to lead with purpose. Its next chapter must consolidate these gains - embedding performance systems, aligning culture with strategy, protecting reputational equity, and ensuring that tourism remains a credible driver of inclusive growth in South Africa.

OFFICIAL SIGN OFF



Mrs. Bronwen Auret
Chief Quality Assurance Officer

Date: 21 July 2025



Mrs. Thembisile Sehloho
Chief Marketing Officer

Date: 21 July 2025



Mr. Darryl Erasmus
Chief Convention Bureau Officer:
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Date: 21 July 2025



Mr. Siyabonga Mthethwa
Chief Strategy Officer

Date: 21 July 2025



Mr. Darryl Erasmus
Chief Operating Officer

Date: 21 July 2025



Mr. Takalani Ramovha
Acting Chief Financial Officer

Date: 21 July 2025



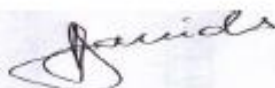
Mrs. Yoland Kona
Head: Strategic Planning,
Evaluation, and Programme
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Date: 21 July 2025



Ms. Nombulelo Guliwe
Chief Executive Officer

Date: 21.7.25



Professor Gregory Davids
Chairperson
South African Tourism Board
(Accounting Authority)

Date: 30/7/25

ANNEXURES

ANNEXURE 1: ABBREVIATIONS

AfCFTA	African Continental Free Trade Area
AGSA	Auditor-General of South Africa
APP	Annual Performance Plan
AR	Annual Report
ARCO	Audit and Risk Committee
ATI	Africa's Travel Indaba
AU	African Union
B2B	Business-to-Business
B2C	Business-to-Consumer
BEE	Black Economic Empowerment
B-BBEE	Broad-Based Black Economic Empowerment
BMA	Border Management Agency
BQV	Basic Quality Verification
COVID-19	Coronavirus Disease, 2019
DDM	District Development Model
DIRCO	Department of International Relations and Cooperation
DMC	Destination Management Companies
DMO	Destination Management Organisation
DPME	Department of Planning, Monitoring and Evaluation
dtic	Department of Trade Industry and Competition
ECOWAS	Economic Community of West African States
ERM	Enterprise Risk Management
ERRP	Economic Reconstruction and Recovery Plan
ESG	Environment, Social, and Governance
EU	European Union
ExCo	Executive Committee
FITUR	Feria Internacional de Turismo
FY	Financial Year
GDP	Gross Domestic Product
HC	Human Capital
HCREMCO	Human Capital and Remuneration Committee
ICCA	International Congress and Convention Association
ICT	Information and Communication Technology
IMEX	Worldwide Exhibition for Incentive Travel, Meetings, and Events
ITB	Internationale Tourismus Börse
ITFFA	International Tourism Film Festival Africa

KPI	Key Performance Indicator
MA	Meetings Africa
MICE	Meetings, Incentives, Conferences and Exhibitions
MOU	Memorandum of Understanding
MPIF	Market Prioritisation and Investment Framework
MTEF	Medium-Term Expenditure Framework
MTR	Mid-Term Report
MTSF	Medium-Term Strategic Framework
NDP	National Development Plan, Vision 2030
NPS	Net Promoter Score
NTSS	National Tourism Sector Strategy 2016-2026
OD	Organisational Development
OPCA	Operation Clean Audit
PIMF	Performance Information Management Frameworks
PFMA	Public Finance Management Act
PME	Planning, Monitoring, and Evaluation
PR	Public Relations
PTA	Provincial Tourism Authorities
QPR	Quarterly Performance Report
R	South African Rand
ROI	Return on Investment
SA	South Africa
SA Tourism	South African Tourism
SADC	South African Development Community
SANCB	South African National Convention Bureau
SCM	Supply Chain Management
SMME	Small, Medium, and Micro Enterprise
SONA	State of the Nation Address
SPEPM	Strategic Planning, Evaluation and Programme Management
Stats SA	Statistics South Africa
TGCSA	Tourism Grading Council of South Africa
TGSP	Tourism Grading Support Programme
TSMP	Tourism Sector Masterplan
TSRP	Tourism Sector Recovery Plan
UNWTO	United Nations World Tourism Organisation
VTSD	Villages, Towns and Small Dorpies
WTM	World Travel Market
WTTC	World Travel and Tourism Council
WYPD	Women, Youth, and Persons with Disabilities

ANNEXURE 2: REFERENCES AND DOCUMENTARY SOURCES

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