SOUTH AFRICAN TOURISM

ANNUAL PERFORMANCE PLAN FY2024/25

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EXECUTIVE AUTHORITY STATEMENT

Fortunately for the global tourism industry, we can now safely say that we have risen above the COVID-19 pandemic.

Airports the world over are buzzing, hotel occupancy numbers are rising and billions of the world's populations are back on the move travelling between various countries for a variety of reasons.

The United Nation's World Tourism Organisation (UNWTO) indicates the global tourism numbers are on the rise with some countries having reached and surpassed pre- COVID 19 numbers. We can all breathe a sigh of relief that the COVID-19 pandemic's catastrophic effects on the global business and leisure tourism sector are gradually fading away, though, indeed we are not all back to 2019 numbers.

As we look forward to the financial year 2024/25, the final financial year of the sixth administration, we need to work together as the greater South African tourism industry to reclaim our place as an appealing tourism and capable business events destination. I am encouraged by the outlook from the UNWTO that global tourism will see more upturn soon, especially in the next two years.

For South Africa to fully get our fair share of global tourism numbers, we are going into the next financial year with clear policies, regulations and strategies that serve to create an enabling environment for our tourism sector. This will allow us to reach our domestic goals of getting more South Africans to travel and explore their own country while attracting more visitors from various part of the world to come to South Africa. The plans outlined in this Annual Performance Plan are inspired by this.

The value of our tourism sector is indisputable. An increase in the number of tourists and business delegates is of vital importance of our sector and for our economy. As a collective, we have a shared responsibility to address the needs of our citizens and visitors alike.

As part of our plans for the 2024/25 financial year, we have spent considerable amount of time, collaborating and consulting with the greater tourism sector and we have laid a solid foundation for the 2024/25 financial year. The projects outlined in this APP represent those engagements and indeed ensure that we are poised for growth.

In 2024, South Africa commemorates 30 years of democracy and while there is much to reflect on, without a doubt, there is a lot to celebrate.

While South Africa has received numerous accolades from a wide array of audiences in different countries, there is no doubt we still need to do more to convey the message of an appealing and safe South Africa boldly and unambiguously.

South African Tourism together with the wider tourism industry, needs to continue with plans of removing barriers and creating a positive narrative about South Africa. Working with other related government departments, we have committed to intensifying our efforts in this regard.

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The rest of the African continent continues to be an important source market for South Africa, and we know the greatest numbers of visitor arrivals come from the rest of Africa. We must therefore work together with the continent's tourism sector to further drive the African continent's tourism growth and economy. A big win for all of us in this regard would be more air lift and air access and more clearer and conducive immigration regulations that will afford access to our various countries on this continent.

The realisation of a thriving intra-African tourism is within our hands and can only be achieved with less talks but more implementation. I am particularly pleased that, in this spirit, going into the next financial year, our strategic shows such as Africa's Travel Indaba in May 2024 and Meetings Africa in February 2025 will be planned and executed even more collaboratively.

South Africa's people continue to be the best assets our country has. Therefore, without a doubt the plans that we have as a sector must serve the country's people.

The plans outlined in this APP are underpinned by the Economic Reconstruction and Recovery Plan, launched in October 2020, the Green Paper on the Development and Promotion of Tourism and Tourism Sector Master Plan, approved by Cabinet in September and October 2023 respectively.

Prosperity for us as South Africa is directly linked to the people and involves promoting inclusive economic growth by ensuring that smaller businesses in the sector are also afforded market access and equipped to promote their products and experiences. As such, we are placing significant emphasis on the promotion of township and village tourism.

Let me extend my appreciation to the South African Tourism Board, appointed during my term of office, for their excellent oversight role. I would like to also thank South African Tourism's Executive Management and greater South African Tourism team for their continued commitment in what was not an easy 2023/24 financial year.

Lastly let me thank the tourism industry as a whole, including the private sector for the continued partnership and collaboration. The plans for the 2024/25 financial year are bold and will need all of us so that we can succeed in our sector attaining full recovery.

P. de Lille

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Honourable Patricia de Lille, MP

Minister of Tourism

ACCOUNTING AUTHORITY STATEMENT

The past financial year has seen a strong recovery of tourism in South Africa.

South African Tourism - working together with the industry, and other public partners - continues to drive this recovery, and spread the benefits of tourism for our citizens.

Over the past year the entity has been focussed on this mission, while also dealing with a leadership transition, rebuilding key functions and capabilities, and navigating issues like safety concerns, confusion around immigration regulations, and a rising cost of living in South Africa, and around the world.
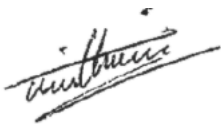
Our work continues to be aligned with the principles and goals of the Tourism Master Plan – our country's plan for overall our sector's recovery and growth.

As we look towards the 2024/25 financial year, we remain committed to achieving our core mandate of increasing tourist arrivals to South Africa.

South African Tourism received an unqualified audit opinion for the 2022/23 financial year, and the board is supporting the management team to ensure that we strengthen any areas of weakness and continue to enhance the governance of the entity.

I would like to thank the Minister of Tourism, Patricia de Lille, for her unwavering support and leadership. She has built a strong link between government and the private sector, which is the most important element of future success. I would like to also to thank the leadership of SA Tourism, and the wider team for their hard work and commitment in a difficult period.

The plan we are tabling here will help us to build on our success and ensure South Africa achieves its tourism potential.

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Mr Tim Harris

South African Tourism Board Chairperson

CHIEF EXECUTIVE OFFICER STATEMENT

I am pleased to present the Chief Executive Officer Statement for South African Tourism's Annual Performance Plan (APP) for the 2024/25 financial year. In all our strategic planning sessions leading up to the 2024/25 APP plans we, as South African Tourism, had some bold and robust discussions. A crucial step for us was to reflect on our aspirations, accomplishments, and the challenges we faced in the 2023/24 financial year and indeed chart a strong path forward as we gear up to win even bigger in the dynamic global tourism landscape.

During the 2022/23 financial year, South African Tourism made significant strides in promoting our country as an attractive value-for-money tourist destination. Despite the global challenges, our dedicated efforts resulted in 6.8 million in international tourist arrivals, showcasing the enduring appeal of South Africa as a travel destination. Through targeted marketing campaigns and collaborative initiatives, we aim to continue to rekindle a renewed sense of adventure among various travellers from various parts of the world, promoting a deeper appreciation for the beauty and cultural wealth that South Africa has to offer and to inspire them to come explore and visit South Africa.
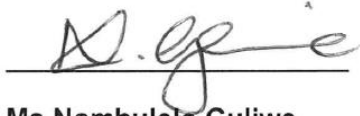
On the domestic tourism front and in the pursuit of fostering sustainable growth, we remain committed to nurturing and expanding our domestic tourism sector. The 2023/24 financial year saw significant strides being made in addressing travellers' challenges, such as affordability and accessibility. In all our work, it was important to ensure that South Africans from all walks of life can access and explore the rich tapestry of our diverse country. As we go into the 2024/25 financial year, we are looking forward to rolling out even more plans to address these needs and more.

The significance of business events cannot be overstated in propelling South Africa onto the global stage. With Meetings Africa and Africa's Travel Indaba at the forefront, we are poised to showcase the country's unique offerings and capabilities in hosting world-class events. With some exciting plans ahead for the 2024/25 financial year, we are looking forward to some key strategic enhancements in our approach to these strategic events, leveraging technology even more, and leading with innovation to amplify the impact of these events. We are committed to facilitating meaningful connections and fostering collaborations. Indeed, South Africa will continue to participate in other global strategic events that take place is some of our key markets, all with the aim of increasing arrival numbers to South Africa.

As we navigate the challenges and opportunities of the past year and look forward to celebrating 30 years of democracy in our country, I envision a future where South Africa continues to shine as a beacon of hospitality and cultural richness. With sustainability top of our agenda, our commitment to community engagement and the preservation of our natural heritage will be unwavering.

With the plans that we have set out for the 2024/25 financial year, our ambitions are high and we are confident that with further partnering with the greater tourism industry, we will realise further growth in visitor and business delegate numbers.

In closing, I extend my gratitude to our resolute team, industry partners, and stakeholders who contribute tirelessly to the success of South African Tourism. Together, we embark on this journey with optimism and a commitment to highlighting the best of South Africa to the world.

Ms Nombulelo Guliwe
Acting Chief Executive Officer

OFFICIAL SIGN-OFF

It is hereby certified that this financial year 2024/25 Annual Performance Plan:

1) Was developed by the management team of South African Tourism, under the guidance of the South African Tourism Board and the Minister of Tourism.

2) Takes into account all the relevant policies, legislation, and other mandates, for which South African Tourism is responsible.

3) Accurately reflects the outputs and targets which South African Tourism will endeavour to achieve over the 2024/25 financial year.
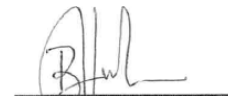
Ms. Bronwen Auret Chief Quality Assurance Officer and Acting Chief Marketing Officer	**Ms. Nomasonto Ndlovu** Chief Operations Officer	**Mr. Bjorn Hufkie** Acting Chief Convention Bureau Officer
Date: 26/01/2024	Date: 26 January 2024	Date: 26/01/2024

Ms. Yoland Kona Head: Strategic Planning, Evaluation, and Programme Management	**Ms. Nombulele Guliwe** Interim Chief Financial Officer & Acting Chief Executive Officer
Date: 26-01-2024	Date: 26-01-2024

Approved by:

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Mr Tim Harris
Chairperson
South African Tourism Board
(Accounting Authority)

Date: 29/01/2024

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Honourable Patricia de Lille, MP
Minister for Tourism
(Executive Authority)

Date: 28/03/2024

ABBREVIATIONS

AA	Accounting Authority
AGSA	Auditor-General of South Africa
APP	Annual Performance Plan
B2B	Business to Business
B-BBEE	Broad-Based Black Economic Empowerment
BEE	Black Economic Empowerment
CCBO	Chief Conventions Bureau Officer
CEO	Chief Executive Officer
CFO	Chief Financial Officer
COO	Chief Operations Officer
COVID-19	Corona Virus Disease, 2019
CQAO	Chief Quality Assurance Officer
CSI	Corporate Social Investment
CSO	Chief Strategy Officer
DigiTech	Digital Technology
DOA	Delegation of Authority
EE	Employment Equity
ERRP	Economic Reconstruction and Recovery Plan
ExCo	Executive Management Committee
FY	Financial Year
GDP	Gross Domestic Product
GRC	Governance, Risk and Compliance
HIV/AIDS	Human Immunodeficiency Virus/Acquired Immunodeficiency Syndrome
ICT	Information and Communication Technology
KPI	Key Performance Indicator
MICE	Meetings, Incentives, Conferences and Trade Exhibitions
MOA/U	Memorandum of Agreement/Understanding
MP	Member of Parliament
MPIF	Marketing Prioritisation and Investment Framework
MTEF	Medium Term Expenditure Framework
MTSF	Medium Term Strategic Framework 2019-2024
N/A	Not Applicable
NDP	National Development Plan Vision 2030 (2012)

PCO	Professional Conference Organiser
PESTEL	Political, Economic, Sociological, Technological, Environmental, and Legislative
PFMA	Public Finance Management Act
PR	Public Relations
Q	Quarter
ROI	Return on Investment
SANCB	South African National Convention Bureau
SANCB	South African National Convention Bureau
SCM	Supply Chain Management
SCM	Supply Chain Management
SME	Small and Medium-sized Enterprise
SMME	Small, Medium, and Micro Enterprises
SONA	State of the Nation Address
TOMSA	Tourism Marketing South Africa
TQiT	Total Quality in Tourism
UGC	User-generated Content
UNWTO	United Nations World Tourism Organisation
USA	United States of America
VTSD	Villages, Townships and Small Dorpies

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PART A: OUR MANDATE

1. UPDATES TO RELEVANT LEGISLATIVE AND POLICY MANDATES

1.1. UPDATED LEGISLATIVE MANDATES

The key legislative mandates presented in the South African Tourism Five-Year Strategic Plan 2020-2025 remain relevant, as follows:

1) Constitutional mandate:

    a) The provisions of the Constitution of the Republic of South Africa,1996, which sets out the rights and duties of its citizens and defines the structure of the government.

         o Chapter 3, Section 41(1) sets out the relationship and principles underlying cooperation and assigning functions between the various spheres of government.

         o Part A of Schedule 4 lists tourism as a functional area of concurrent national and provincial legislative competence.

2) Legislation prescribing the South African Tourism mandate:

    a) The Tourism Act (No. 3 of 2014), which establishes the entity, and in Chapter 3 sets out the functions of the South African Tourism Board.

    b) The Public Finance Management Act (No. 1 of 1999, as amended) (PFMA), lists South African Tourism as a Schedule 3A national public entity, which is accountable to the Minister of Tourism and Parliament. All prescripts and regulations arising from the PFMA are applicable to South African Tourism's governance and operations.

3) Legislation informing the delivery of the core mandate:

    a) Various legislation pertaining to the governance and control environment and institutional arrangements.

    b) All national and provincial legislation and regulations, and all municipal bylaws, applicable to South African Tourism's functions or the areas in which it operates.

    c) The Green Paper on the Development and Promotion of Tourism in South Africa outlines interventions that are pivotal to tourism growth, which will be implemented in a coordinated and effective manner. Key to South African Tourism are the tourism crisis management framework, domestic tourism, facilitating ease of access, a unified tourism competitive identity for South Africa, regional integration, promoting South Africa as a preferred destination for tourism investment, positioning South Africa as a leader in hosting international events, keeping pace with technological developments, responsible tourism, strengthening mechanisms for quality visitor services, and investment in rural and peri-urban routes to stimulate the rural economy.

4) Emerging regulatory amendments, which impact the operations of South African Tourism:

   a) With the aim of aligning regulations with the Constitutional Court judgement of 30th May 2022, on 4th November 2022, the Minister of Finance gazetted the new Preferential Procurement Regulations, 2022, under the Preferential Procurement Policy Framework Act, 2000. South African Tourism's supply chain management policy must align with the new regulations.

   b) The amendments to the Employment Equity Act were signed into law by the President on 14th April 2023, which is intended to promote transformation in the private sector. On 12th May 2023, the first set of regulations to implement the amendment was published for public comment, to come into effect on 1st September 2023. South African Tourism will be required to review its supply chain management and human resources policies to ensure compliance with the new regulations.

1.2.   UPDATED POLICY MANDATES

There are no updates to the policy mandates presented in the Five-Year Strategic Plan 2020-2025, which reflect as follows:

1) The National Development Plan, Vision 2030 (2012) (NDP) which seeks to eliminate poverty and sharply reduce inequality and unemployment by 2030. The NDP recognises tourism as one of the main drivers of employment and economic growth.

2) The Medium Term Strategic Framework 2019-2024 (MTSF) is the manifestation of an implementation plan for the NDP and gives effect to the electoral mandate of the 6th Administration. It is framed around seven national priorities for the period to 2024. South African Tourism contributes to three MTSF priorities:

   a) Priority 1: A capable, ethical, and developmental State.
   b) Priority 2: Economic transformation and job creation; and
   c) Priority 7: A better Africa and world.

3) The National Tourism Sector Strategy 2016-2026 sets out a vision for a *"rapidly and inclusively growing tourism economy that leverages South Africa's competitive edge in nature, culture and heritage, underpinned by ubuntu and supported by innovation and service excellence."*

4) The White Paper on the Development and Promotion of Tourism in South Africa (1996) sets out a framework and guidelines for tourism development and promotion in South Africa.

5) The Tourism Grading Council of South Africa grading criteria, 2019, seeks to advance and maintain a recognisable, credible, and globally benchmarked system of quality assurance for accommodation and venues in South Africa.

6) The Tourism Black Economic Empowerment Charter aims to not only make South African tourism globally competitive, but to open the benefits of tourism to previously disadvantaged individuals.

2.   UPDATES TO INSTITUTIONAL POLICIES AND STRATEGIES

Since the tabling of the Five-Year Strategic Plan 2020-2025 in March 2020, certain policy and strategy developments have emerged, which have a bearing on the work and operations of South African Tourism. These policy implications and directives have been considered in the development of this APP.

2.1.   ECONOMIC RECONSTRUCTION AND RECOVERY PLAN, 2020

The Economic Reconstruction and Recovery Plan (ERRP), published in late 2020, is the country's plan for overall economic recovery after the COVID-19 pandemic. The ERRP identifies the following eight priority interventions to drive the reconstruction and recovery of the South African economy:

Figure 1:   Economic Reconstruction and Recovery Plan

Source: Economic Reconstruction and Recovery Plan, 2020

In addition to tourism being identified as one of the priority areas of intervention in the ERRP, the tourism sector contributes to a number of other priorities of the ERRP.

The Annual Budget Prioritisation Framework continues to build on the stabilisation, recovery, and reconstruction efforts adopted through the ERRP Over the 2024 medium term, the fiscal stance is to achieve fiscal sustainability by reducing the budget deficit and stabilising the debt-to-GDP ratio. The focus is to identify savings within existing baselines, while protecting frontline service delivery. Additional allocations to a programme will need to be funded through reductions in another programme or through reprioritisation, either within the department or entity, or from other department or entity budgets.

2.2. TOURISM SECTOR MASTERPLAN, 2023

The National Tourism Sector Strategy 2016–2026, which was adopted by Cabinet in December 2017, as well as the NDP, served as the foundation for the creation of the Tourism Sector Masterplan. Additionally, this masterplan was derived from the three-year Tourism Sector Recovery Plan, 2021, which comprises interventions that extend beyond its immediate implementation time period of 2023–2024 and was approved by Cabinet in April 2021.

The plan primarily aims to galvanise government, industry, and labour to collectively share a common vision that will position the tourism industry on an inclusive and sustainable competitive path for the benefit of all South Africans. The masterplan is anchored on three interlinked pillars or strategic themes:

Protect and Rejuvenate Supply

Reignite Demand

Strenghen Enabling Capability
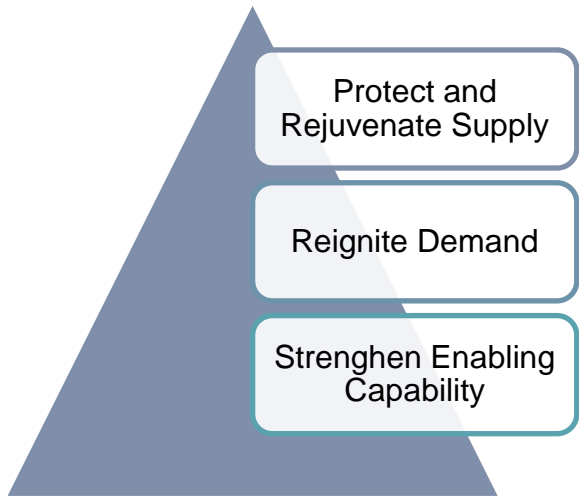
Within these pillars, there are seven strategic interventions that address key areas of focus:

Enhancing Education & Skills Development → Promoting Entrepreneurship & Economic Growth → Improving Infrastructure & Connectivity

Strengthening Governance & Institutions ← Preserving the Environment & Natural Resources ← Fostering Social Cohesion & Well-Being

Promoting Regional Co-operation
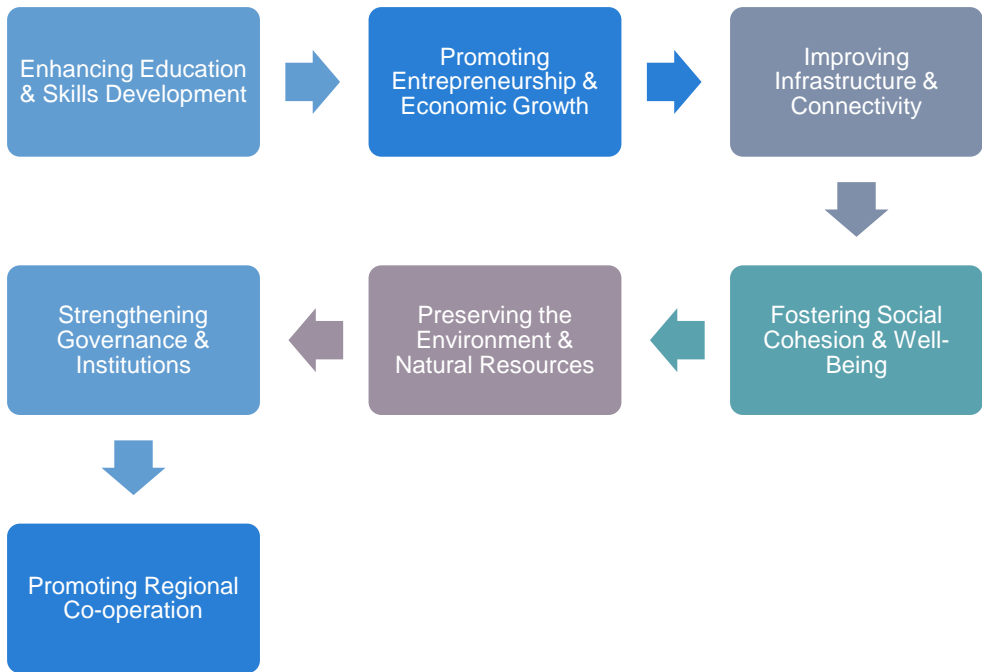
Additionally, there are three enablers that support the implementation of the plan:

Stimulate domestic demand through government consumption expenditure.

Partner with relevant departments to ensure improved travel facilitation through implementation of e-visas, tourist safety, airlift capacity, and quicker turnaround times in the processing of tour operator licences.

Form targeted, strategic partnerships between government and industry.

The plan indicates that South African Tourism is the lead partner in destination marketing of South Africa as a key destination, and will lead the stimulation of domestic demand through targeted initiatives and campaigns through:

1) Domestic tourism seasonal campaigns.

2) Domestic business events campaigns.

3) Domestic Business-to-Business (B2B) Campaign.

4) Business events hosted in Villages, Townships and Small Dorpies (VTSDs).

5) Increasing the number of quality assured establishments.

6) Confirming and implementing the brand management protocol.

7) Regional tourism campaigns to increase the number of tourists from the continent/region.

8) A global marketing campaign targeted at high value source markets implemented.

9) A global business events campaign.

10) Drive an increase in the number of events and business events hosted in South Africa.

11) Drive the number of international bid submissions.

12) Drive industry marketing collaboration with regional counterparts; and

13) Design and implement joint domestic and international campaigns.

In line with the Minister's Delivery Agreement signed with the President, South African Tourism will contribute towards the following priorities:

1) Increase the volume and value of domestic and international tourism through the Tourism Recovery Plan.

2) Enabling conditions for visitor experience

3) Support for existing businesses and growth of SMMEs.

2.3. SOUTH AFRICAN TOURISM MARKETING PRIORITISATION AND INVESTMENT FRAMEWORK, 2020

In 2016/17, South African Tourism developed the Marketing Prioritisation and Investment Framework (MPIF) that identified priority markets in order to optimise its marketing investments accordingly and distribute resources to help meet the set objectives. Every five years, South African Tourism reviews this portfolio in order to improve its ability to dynamically and effectively allocate and manage its budgets and resources.

In early 2020, South African Tourism initiated a revision of the MPIF, using 2019 as the base year to review the portfolio. The framework made use of 33 variables related to performance, outlook, South Africa's ability to win in the market, and return on past investments.

The revised MPIF aims to:

| Review and update the various parameters to ensure a robust view of the current business environment and market prioritisation. | Support day-to-day decision-making through an enhanced view on increasing efficiency and tapping into short-term opportunities. | Transition key elements of the MPIF model to a power business intelligence environment to enable easy access, navigation, and usage. |

The MPIF seeks to prioritise key markets by classifying them as follows:

Segment	Description	Service Model
Defend markets	▪ markets where South Africa holds a substantial market share and requires continued intervention to ensure arrivals. ▪ These markets hold both volume and value importance for South Africa. South African Tourism needs to maintain or defend its share.	Maintain the existing share in the markets outbound.
Growth markets	▪ markets that hold considerable outbound potential. ▪ However, the share of South Africa in outbound has growth potential.	Elevate South Africa's position in the market relative

Segment	Description	Service Model
	▪ These markets provide an ample opportunity to grow based on their size.	to long-haul competitors.
Watchlist markets	▪ markets that hold reasonable outbound potential. ▪ However, the current share of South Africa in outbound is low. ▪ These markets provide an opportunity for nurturing and investing for future growth and need to be kept in the watchlist.	

A total of 24 markets are prioritised, which are segmented into 16 growth and 8 defend markets:

Figure 2:   Priority Source markets Identified to Grow Tourism into South Africa, 2020-2025

Source: South African Tourism Marketing Prioritisation and Investment Framework, 2020

In addition to the above, the watchlist markets hold reasonable outbound potential. These markets are key to monitor, as South African Tourism needs to protect its previous marketing investments.

To achieve pre-pandemic arrival levels, it is important to consistently evaluate the relative significance of the 24 prioritised markets and to stay informed about factors that impact travel likelihood from each market.

The MPIF will be revised in the first quarter of the financial year 2024 – 2025.

2.4. ENHANCING A WHOLE OF STATE APPROACH TO TOURISM, 2023

Data reveals that South Africa's reputation as a top tourism destination has dwindled over time. Although it was once celebrated as a primary wildlife haven, it has now ceded ground to rivals like Kenya and Australia. Additionally, South Africa's tourism brand has suffered in terms of its appeal, desirability, memorability, and overall recognition.

A major concern is the fragmentation of South Africa's destination brand, often operating independently from provincial and industry brands. This has led to confusion and conflicting messages in the market. To bolster South Africa's global competitiveness, there is an urgent need to reaffirm South Africa's destination brand. This entails reclaiming global recognition, rebuilding awareness, restoring distinctiveness, and enhancing appeal and desirability.

In the diverse and competitive landscape of tourism, South Africa faces the challenge of marketing its unique attractions against global destinations. Despite limited resources and a weaker currency compared to key competitors, it is crucial for all destination marketing organisations, both public and private, to collaborate and establish a unified messaging position. By sharing consistent messaging and content, we can make a strong impact in international markets.

To achieve this, it is essential to create a mechanism that ensures all stakeholders have access to and promote the same messaging. By aligning core programmes and opportunities, we can maximise South Africa's tourism marketing efforts and overcome budget constraints. The goal is to develop flexible, open-source content that is available to everyone for coordinated brand application**.**

Thus, the '5Cs' concept was introduced as a set of fundamental principles for effective project activation, fostering a shared sense of purpose, mission, and collaboration among stakeholders:

CO-CREATION: Defining the key players and their roles in the visitor journey, and working with the private and public sector to co-create the South African tourism experience and to redefine the destination marketing strategy.

CONVERSION: Creating a clear path from strategy to impact/implementation in solving the key challenges and barriers to tourism.

COORDINATION: Choreographing mutual success by ensuring every action is tactfully planned and implemented as a managed step towards the end goal.

COMPLEMENTARITY: Streamlining ways of working between the provincial and national tourism brands to minimize competing messages and maximise cross-selling opportunities.

COLLABORATION: Levelling the playing field so that each industry partner can collaborate equally, and to build trust in relationships between industry partners.

Ultimately, to increase arrivals to South Africa and regaining pre-pandemic visitor numbers, it is imperative to adeptly apply the '5Cs' in the marketing of South Africa as a premier tourism destination.

3. UPDATES TO RELEVANT COURT RULINGS

There are no court judgements or rulings which have a bearing on the mandate and/or core operations of South African Tourism.

PART B: OUR STRATEGIC FOCUS

In giving effect to the legislative and policy mandate outlined in Part A, the 2020-2025 Strategic Plan articulates the South African Tourism's strategic focus, namely, its vision, mission, and values, as follows:

VISION
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.

MISSION
Marketing South Africa both internationally and domestically to increase the volume of tourists and the value they add to the economy, by: ▪ Implementing an integrated tourism marketing strategy for South Africa. ▪ Promoting South Africa as a world class business events destination. ▪ Facilitating the delivery of service orientated, quality assured, tourism experiences. ▪ Positioning South African Tourism as an industry thought leader. ▪ Championing a digital outlook for the industry; and ▪ Enhancing stakeholder participation and collaboration.

VALUES	
In working towards the achievement of its vision and mission, South African Tourism subscribes to the following organisational values, which are in line with the Batho Pele principles:	
Integrity	We do things consistently, ethically, and honestly, regardless of the circumstances.
Respect	We treat everyone with utmost dignity, inclusiveness, openness and 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.

VALUES	
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.

1. UPDATED SITUATIONAL ANALYSIS

1.1. EXTERNAL ENVIRONMENT ANALYSIS

1.1.1. GLOBAL AND REGIONAL CONTEXT

The repercussions of the COVID-19 pandemic have been profoundly experienced throughout the travel and tourism sector. Nevertheless, 2022 marked a significant resurgence for this industry. Data from the World Travel and Tourism Council 2023 annual research, encompassing 185 countries and 26 global regions, underscores the magnitude of the 2022 recovery.

Figure 3: Contribution of Global Travel and Tourism to GDP and Jobs

Global Data				
	Total GDP contribution:		**Total Travel & Tourism jobs:**	
2019	**10.4%** (of Total Economy) USD **10.0 TN**	Change in 2020: **-49.4%**	**334 MN** =10.3% (Share of Global Jobs)	Change in 2020: **-70.7 MN** -21.2%
2022	**7.6%** USD **7.7 TN**	Annual Change: **+22.0%** (-22.9% vs 2019) Economy Change YoY= 3.1%	**295 MN** =9.0%	Annual Change: **+7.9%** (-11.4% vs 2019)
2023 (F)	**9.2%** USD **9.5 TN**	Annual Change: **+23.3%** (-5.0% vs 2019) Economy Change YoY= 1.3%	**320 MN** =9.6%	Annual Change: **+8.2%** (-4.2% vs 2019)

South Africa Key Data

2019	**7.8%** (of Total Economy) ZAR 513.1BN (USD 31.3BN)	Change in 2020: **-51.9%**	**1.51MN** =9.2% (Share of Total Jobs)	Change in 2020: **-33.1%**
2022	**6.3%** ZAR **421.7BN** (USD 25.8BN)	Annual Change: **+48.7%** (-17.8% vs 2019) Economy Change: +2.3%	**1.31MN** =8.4%	Annual Change: **+25.3%** (-13.1% vs 2019)
2023 (F)	**6.8%** ZAR 458.9BN (USD 28.0BN)	Annual Change: **+8.8%** (-10.6% vs 2019)	**1.38MN** =8.7%	Annual Change: **+5.5%** (-8.3% vs 2019)

Source: World Travel and Tourism Council Travel and Tourism Economic Impact Report, 2023

In the pre-pandemic year of 2019, the travel and tourism sector championed an instrumental role in global employment, underpinning approximately 334 million jobs. This accounts for a substantial 1 in every 10 jobs on a global scale. Despite concerted efforts by governments worldwide, including employment retention schemes, such as furlough programmes, the sector confronted a precipitous decline, culminating in the loss of 70.2 million jobs in 2020 – a contraction of 21.2%.

The year 2022 heralded an encouraging phase of recovery for the industry. As the sector's contribution to the global economy surged by 22.0%, it catalysed a revival in employment figures, which climbed to 295 million. Although this represents an 11.4% decrement relative to 2019, it is a testament to the industry's resilience. It is essential to note the more tempered recovery rate in employment, as opposed to its contribution to the GDP. Such a phenomenon underscores the inherent stability and less reactionary nature of employment metrics within this sector.

As we gaze into the horizon, projections for 2023 indicate promising trajectories. The travel and tourism sector's contribution to the global GDP is anticipated to ascend to 9.5 trillion USD, albeit at a 5.0% diminution compared to 2019 standards. Concurrently, the employment domain is poised for further rejuvenation, with estimations pointing to 320 million jobs, marking a 4.2% deviation from 2019 benchmarks.

Focusing on South Africa's travel and tourism sector, 2023 projections indicate a contribution of 28 billion USD to its GDP, reflecting a decline of 10.6% compared to 2019. Furthermore, the sector is expected to support 1.38 million jobs, marking an 8.3% decrease from 2019 figures. The data underscores the critical need for targeted interventions and strategic investments to stimulate recovery and ensure the long-term sustainability of the sector in South Africa.

Navigating through a landscape marked by the unprecedented challenges of the COVID-19 pandemic, the global travel and tourism market witnessed significant disruptions. Nevertheless, the industry showcased exceptional resilience and tenacity, successfully

charting a path towards recovery. This narrative of resilience and revival, as depicted by the United Nations World Tourism Organisation (UNWTO) World Tourism Barometer, offers invaluable insights for our investors and stakeholders.

Figure 4:   International Tourist Arrivals (% change versus 2019)
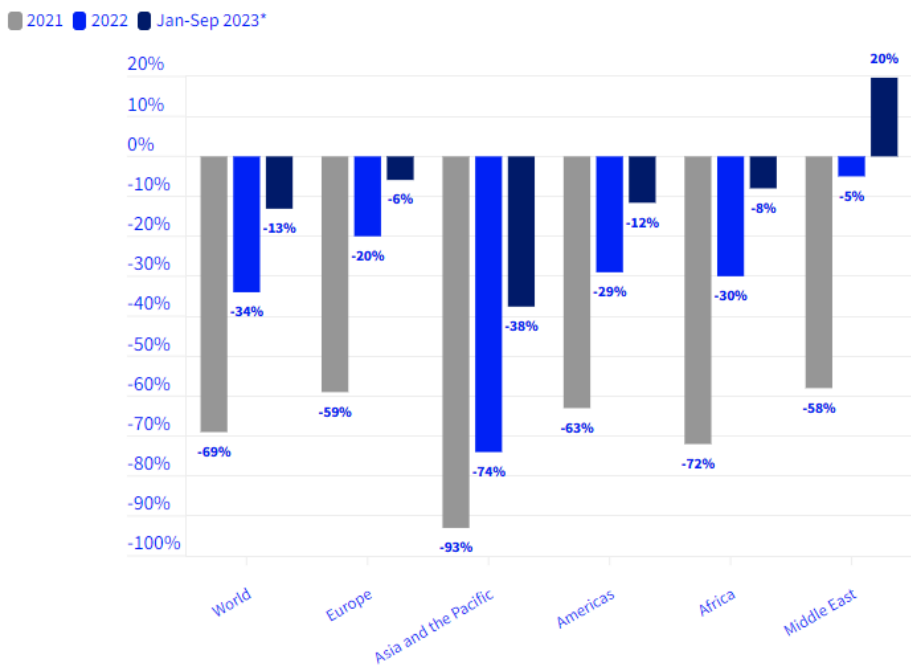
Source: UNWTO, Data as published 30 November 2023

The global tourism industry is experiencing a remarkable recovery, nearing a return to its pre-pandemic strength. As per the World Tourism Organization (UNWTO), the first nine months of 2023 witnessed a substantial resurgence in international tourism, with approximately 975 million tourists traveling abroad. This marks a 38% surge compared to the same period in 2022, signalling a robust comeback.

The latest UNWTO World Tourism Barometer further highlights this resurgence. In the third quarter of 2023, international tourist arrivals surged by 22% compared to the previous year, propelled by a vibrant summer season in the Northern Hemisphere. This period saw international tourist numbers reach 91% of the pre-pandemic figures, with July 2023 emerging as the strongest month since the pandemic's onset. Overall, from January to September 2023, the sector recovered 87% of its pre-pandemic levels and is projected to achieve nearly 90% recovery by year's end.

In financial terms, international tourism receipts are anticipated to approach USD 1.4 trillion in 2023, roughly 93% of the USD 1.5 trillion earned in 2019. This near-complete recovery from the COVID-19 crisis is a testament to the resilience of the tourism sector, with many destinations now attracting tourist numbers and revenue comparable to or even surpassing their pre-pandemic levels. UNWTO Secretary-General Zurab Pololikashvili emphasizes the critical importance of this recovery for destinations, businesses, and communities reliant on tourism.

Regional analysis reveals varied recovery patterns. The Middle East leads the recovery, with tourist arrivals 20% higher than pre-pandemic levels. This success is attributed to visa facilitation, new destination development, investment in tourism projects, and hosting significant events. Europe, as the largest destination region, welcomed 550 million international tourists, achieving 94% of its pre-pandemic levels, buoyed by strong intra-regional and U.S. demand. Africa and the Americas are also recovering steadily, with Africa regaining 92% and the Americas 88% of their pre-pandemic visitors. Asia and the Pacific show a more mixed recovery, with overall figures at 62% of pre-pandemic levels, though South Asia nearly fully recovered while North-East Asia lagged behind.

The barometer provides detailed insights into regional, sub-regional, and individual destination performances. Additionally, outbound travel spending has been robust, with several key markets like Germany, the United States, and Italy spending more on travel than in 2019. The industry's positive trajectory is further evidenced by strong air passenger numbers and tourist accommodation occupancy levels, as reported by IATA and STR.

Despite economic challenges like high inflation and geopolitical tensions, the international tourism sector is on a clear path to a complete recovery by 2024, showcasing its dynamic adaptability and enduring appeal.

1.1.2. SOUTH AFRICA'S TRAVEL AND TOURISM: A TRAJECTORY TOWARDS RECOVERY

In focusing our attention on South Africa's travel dynamics for 2023, the results are notable. During the first ten months alone, the nation registered a commendable 6.8 million international arrivals, culminating in a revenue yield of 69,3 billion ZAR. According to South African Tourism's projections, supported by Oxford Economics Data, the trajectory is decidedly positive. By the end of 2023, South Africa is anticipated to host approximately 8.9 million international visitors, with an expected revenue generation of 71 billion ZAR.

Figure 5: International Tourist Arrivals
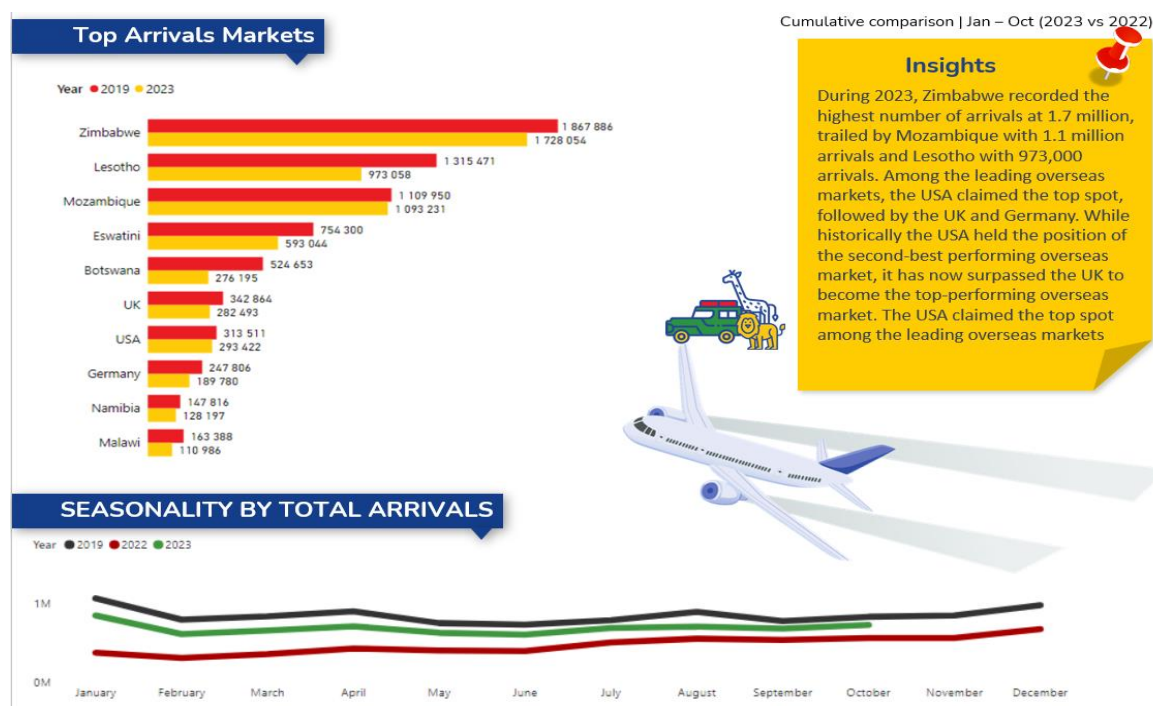
Source: StasSA Tourism & Migration Report, Jan- Oct 2023 vs 2022

These figures not only suggest a tangible recovery but also underline the potential for South Africa's travel and tourism sector to approach, if not surpass, pre-pandemic levels. It emphasises the sector's resilience and the integral role it plays in the nation's economic framework.

The Minister's Delivery Agreement with the President includes 10.6 million arrivals by the end of March 2024, but currently, projections reveal 8.9 million by March 2024. This is a key issue to assess, plan for, and track. Critical factors that will drive visitor numbers include visa availability, affordability, air access, and top-of-mind presence, through marketing. Key in this regard is the focus on the 24 priority source markets as defined in the MPIF introduced previously.

In addition, certain investment markets are considered, to build demand in second-tier markets that provide a pipeline for future growth, and that may diversify the portfolio of source countries to mitigate the risk of depending on only 24 markets to drive tourism recovery.

The investment markets by region are:

Europe	Asia Pacific	Americas	Africa Air
Switzerland	Singapore	-	Democratic Republic of Congo
Belgium	Malaysia		
Sweden	United Arab Emirates		Tanzania
Ireland			

Europe	Asia Pacific	Americas	Africa Air
Denmark Portugal			
Austria Norway Finland Turkey	New Zealand	Argentina	Ghana Angola Uganda Ethiopia

1.1.3. LOOKING AHEAD

The first quarter results of 2023, globally, align well with the UNWTO's forward-looking scenarios for the year, predicting international arrivals to recuperate between 80.0% and 95.0% of pre-pandemic levels. The UNWTO's Panel of Experts have expressed optimism for a robust peak season (May to August) in the Northern Hemisphere. This sentiment is echoed in the latest UNWTO Confidence Index, indicating that the performance for this period is set to surpass the strides made in 2022.

Despite these promising prospects, the path to recovery in tourism is not without its hurdles. The UNWTO Panel of Experts indicate that the global economic climate remains a significant factor influencing the effective recovery of international tourism in 2023. The repercussions of high inflation and escalating oil prices, resulting in increased transport and accommodation costs, cannot be overlooked. Consequently, a shift in tourist behaviour is anticipated, with a greater emphasis on value for money and preference for local travel. Furthermore, the uncertainties arising from the Russian aggression against Ukraine, along with other burgeoning geopolitical tensions, continue to pose potential risks to the recovery trajectory.

1.1.4. UPDATED PESTEL ANALYSIS

		INSIGHT	IMPLICATIONS
P	**Political**	- South Africa has a democratic government that is based on a multi-party system. - The ruling party, the African National Congress, has been in power since the end of Apartheid in 1994. - The government has implemented policies that promote the country's growth, such as the NDP, which aims to achieve sustainable growth by 2030.	- Perceptions of instability and corruption in South Africa deters potential tourists. - Positive international relations can boost air access and tourist arrivals. - Political stability influences perceptions of South Africa as a welcoming destination, and the process and functioning of the 2024 elections are key in this regard.

		However:
		
		▪ Political instability and conflicts harm tourism. Examples include USA/China decoupling and Russia/Ukraine conflict.
		
		▪ Political policies influence tourism, for example:
		   o Visa regulations
		   o Taxation
		   o Travel restrictions
		   o Rising fuel costs	

E	**Economic**	▪ South Africa is the second largest economy in Africa and has a highly diversified economy. ▪ The country has an abundance of natural resources, such as gold, diamonds, and platinum, which have been the backbone of its economy. ▪ The government has implemented several economic policies, such as Black Economic Empowerment (BEE) and Broad-Based Black Economic Empowerment (B-BBEE) to address these challenges. However: ▪ The country struggles with high levels of inequality, poverty, and unemployment. ▪ Economic conditions influence individual disposable income and travel budgets. ▪ Exchange rates affect the cost of travel for foreigners. ▪ Inflation can increase the overall expense of trips. ▪ Labour shortages may elevate service prices in tourism. ▪ Interest rates can influence travel financing and spending.	▪ Recovery of tourism businesses is a top priority. ▪ Spreading economic activity nationwide is vital amidst rising inflation and decreasing disposable incomes. ▪ Loadshedding has escalated business costs, exacerbated by red-tape and, increasingly, logistics and water security issues. ▪ Rising interest rates and fuel prices further reduce consumer disposable income, affecting tourism budgets. ▪ Favourable exchange rates make South Africa a value-for-money destination for international tourists.
S	**Social**	▪ South Africa is a culturally diverse country with a population of over 62 million people.	▪ Higher unemployment correlates with reduced domestic tourist market size.

		▪ The country has 12 official languages (including sign language). ▪ The country has a rich history, and its cultural diversity has contributed to the growth of its tourism sector. ▪ South Africa still faces several social challenges, such as high levels of crime, violence, and HIV/AIDS. However: ▪ Demographic changes, cultural attitudes, and lifestyle trends influence tourism. ▪ These factors shape how and why people travel. ▪ Rising interest in sustainable and eco-friendly tourism practices. ▪ Minimising carbon footprint is a growing consideration for travellers.	▪ Diverse cultures and income disparities can result in unequal treatment of tourists. ▪ High youth unemployment poses challenges for future tourism growth segments. ▪ Tourism growth can potentially reduce unemployment levels. ▪ Tourism provides a platform for bridging cultural divides, allowing people to understand diverse perspectives.
T	**Technological**	▪ South Africa has made significant investments in its technology infrastructure, which has contributed to the growth of this industry. ▪ The country has a highly skilled workforce and has become a hub for technology innovation on the African continent. ▪ Technological advancements alter how people travel and their service expectations. Examples include online booking platforms, virtual reality tours, and mobile applications. However: ▪ Limited technological access, especially in rural areas, curtails economic development and widens social inequalities. ▪ Cybercrime, data breaches, and digital threats persist due to a lack of cybersecurity experts and measures.	▪ Rise of online travel agencies contrasts with the decline of brick-and-mortar agencies. ▪ Challenges exist with digital infrastructure, including aging telecommunication networks, limited broadband connectivity, and costly high-speed internet. ▪ Collaboration among government, private sector, and civil society is crucial to ensure technology benefits all South Africans.

		▪ Load-shedding further strains the technological infrastructure.	
E	**Environmental**	▪ South Africa has a diverse ecosystem, which includes several national parks and wildlife reserves. ▪ South Africa has implemented several policies to protect its natural resources, such as the National Environmental Management Act. However: ▪ The country still faces several environmental challenges, such as water scarcity, air pollution, and climate change. ▪ South Africa is sensitive to climate change impacts like rising temperatures and shifting rainfall patterns. ▪ Specific regions like KwaZulu-Natal and the Eastern Cape have experienced recent severe environmental events. ▪ Scarcity of water is exacerbated by factors like population growth, urbanisation, and climate change.	▪ Growing global environmental consciousness influences consumer spending habits in tourism. ▪ There is rising demand for environmentally friendly and sustainable tourism products. ▪ Climate change, natural disasters, and resource depletion directly affect tourism. ▪ Load-shedding impacts water distribution, leading to further restrictions for both locals and tourists. ▪ Water pollution in coastal regions poses a threat to tourism. ▪ Preserving biodiversity through habitat maintenance and controlling ecological threats is crucial.
L	**Legal / Regulatory**	▪ South Africa has implemented several laws to protect the rights of its citizens, such as the Constitution of the Republic of South Africa. ▪ South Africa has a complex legal system that is based on common law, Roman-Dutch law, and customary law. However: ▪ Rampant corruption affects the country's economy and societal fabric. ▪ High rates of various crimes (violent, property, organised) negatively influence public safety. ▪ Access to justice is limited for many due to sparse legal services, language obstacles,	▪ Global travel advisories often highlight crime and corruption issues, deterring potential tourists. ▪ Labour laws, consumer protection, and safety regulations influence the tourism sector. ▪ Health and safety guidelines, travel insurance mandates, and liability laws shape tourism practices. ▪ Data privacy laws have altered marketing strategies deployed by destination marketing organisations (DMOs), making consumer reach more restrictive.

		and insufficient legal understanding. ▪ Human rights challenges persist, including discrimination, police brutality, and access to vital services like healthcare and education.	

The PESTEL highlights that the 2024/25 fiscal year is a crucial transition period between the sixth and seventh administrations. Key considerations include ensuring a smooth transition in planning, budgeting, and reporting processes.

To address identified factors, strategic actions include reviewing the MPIF for investment in market decisions and evaluating the effectiveness of the leisure and business tourism brand approach and interventions. The goal is to inform and shape strategies that present South Africa as a competitive tourism destination. Additionally, it is crucial to strengthen an integrated master approach to South Africa's tourism brand through toolkits and enhanced collaboration for continual improvement.

Other priorities involve an emphasis on leading the digital transformation of the tourism sector, reviewing the South African National Convention Bureau (SANCB) strategy, critically examining the strategic platforms where South African Tourism must 'show up', and formulating the Global Trade Strategy addressing barriers and enhancing the visitor experience.

1.2. INTERNAL ENVIRONMENTAL ANALYSIS

Corporate Brand

Towards the end of 2022/23 fiscal year and well into the 2023/24 fiscal year, South African Tourism has been confronted with reputational challenges. This has resulted not only in the erosion of the South African Tourism corporate brand but also a loss of trust internally and externally, which adversely impacts reputation and productivity. The implication of this is that, going forward, South African Tourism's efforts toward the restoration of the entity's corporate brand and reputation will need to be intensified.

There is a need for greater collaboration with the private sector, provincial government, and the provincial tourism authorities, as well as local government. In addition, better coordination is required between the Department of Tourism and South African Tourism as its implementing agent, including improved communication by South African Tourism to the Ministry and the Department. Hence, the whole of state approach to tourism is required as outlined in section 2.4 of this APP.

Human Capital

South African Tourism currently faces challenges in becoming an employer of choice, as it struggles to attract and retain top talent in the industry. The organisation's reputation as an

employer has declined over the years, leading to difficulties in recruiting qualified candidates and high turnover rates. This problem is further compounded by low levels of employee engagement, limited career growth opportunities, and a challenging work environment. As a result, the South African Tourism is unable to position itself as an employer of choice.

The staff engagement survey results display a decrease in engagement levels year on year and a concerted effort is required to implement action plans to enhance overall satisfaction levels and wellbeing. The high vacancy rate created by continuous moratoriums impacts capacity. However, despite these challenges, the organisation operates to the best of its ability.

A degree of uncertainty continues to characterise South African Tourism's operating environment, with the post-pandemic impact on arrivals and the instability created through numerous leadership changes at the executive and senior level. The target operating model and organisational structure needs to be optimised to support the level of agility demanded by current and future operating contexts. South African Tourism will, therefore, focus on these internal challenges in the new fiscal, as well as striving to create a conducive and inclusive environment to work for its employees.

Key focus areas in the fiscal will be on leadership stability, organisational effectiveness initiatives, targeted focus on employee wellbeing, assessment of the operating model, and recognition and the reinforcement of a high-performance culture in support of the entity's strategic objectives.

Women, Youth and Persons with Disabilities

In support of government's transformation agenda, South African Tourism will continue to prioritise the empowerment of minority groups aligned to our employment equity targets and plan. Key initiatives include the annual learnership and workplace experiential placement opportunities for youth, and the employment of persons with disabilities.

Information and Communication Technology

During the financial year (FY) 2022/2023 and FY2023/2024, the Information and Communication Technology (ICT) governance environment has improved with the approval of the ICT Governance Framework, ICT Security Framework, ICT Strategy with implementation plan, and ICT policies and procedures. This paved the way to resolve audit findings raised during the same period. The ICT business unit has been implementing various initiatives to address business pain points. For the FY2023/2024, the business unit will implement initiatives to address business needs, particularly the automation of processes and systems.

Broad-Based Black Economic Empowerment

To enhance its B-BBEE compliance and contribute more effectively to economic transformation in South Africa, South African Tourism will focus on:

1) Actively working towards incorporating disabled individuals into its workforce.

2) Promoting transparency in supplier development and enterprise development initiatives

by clearly defining the criteria for beneficiaries and ensuring they are part of the supply chain.

3) Committing to meaningful community development initiatives that align with B-BBEE goals.

4) Fostering collaboration and communication internally to enhance coordination in meeting B-BBEE requirements.

5) Benchmarking against industry leaders and peers to identify areas where South African Tourism may further excel in B-BBEE compliance and economic transformation initiatives.

1.2.1. SOUTH AFRICAN TOURISM'S STRATEGIC FRAMEWORK FOR 2020-2025

Where the legislation directs the mandate, objects, and functions of South African Tourism, the policy directives inform the priorities and focus of the organisation.

Figure 6: National Policy Framework for Tourism
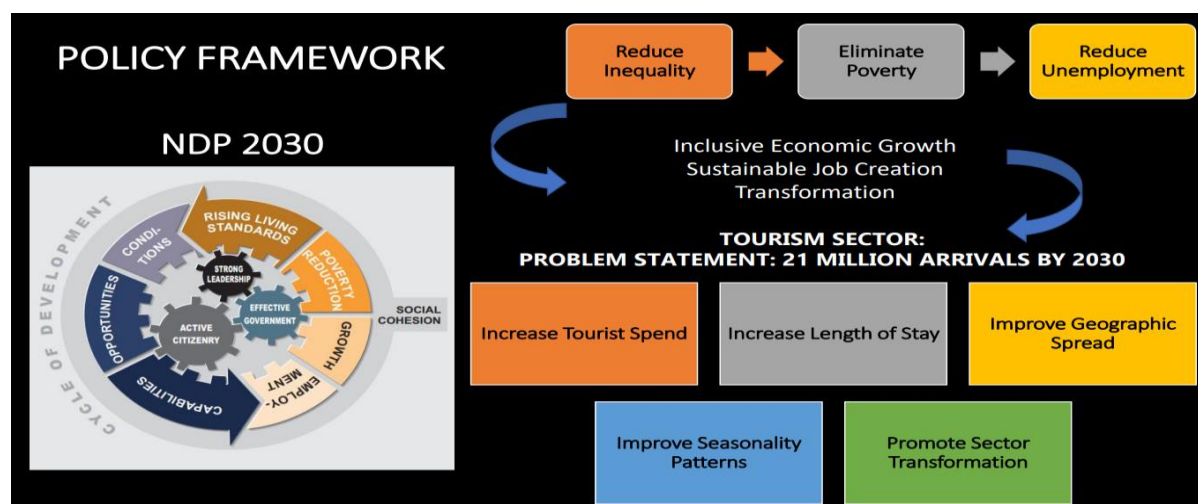
Source: South African Tourism, August 2022

In addition, the National Tourism Sector Strategy sets out a vision for a 'rapidly and inclusively growing tourism economy that leverages South Africa's competitive edge in nature, culture, and heritage, underpinned by ubuntu and supported by innovation and service excellence. A top world responsible tourism destination'. Key to South African Tourism, from the National Tourism Sector Strategy, are the pillars related to effective marketing and visitor experience. These pillars are driven through Programme 3: Leisure Tourism Marketing, Programme 4: Business Events, and Programme 5: Tourist Experience.

Responding to this policy context, South African Tourism has a twofold intent in terms of its strategy. Firstly, to lead the recovery of the tourism sector and reassert South Africa as a preferred leisure and business events destination to relevant priority markets; and secondly,

to increasingly play a leadership role in orientating the tourism sector to exploit the opportunities arising from a fast-changing, technologically savvy, and diverse tourism market.

Figure 7:   South African Tourism's 2020-2025 Revised 'Strategy on a Page'
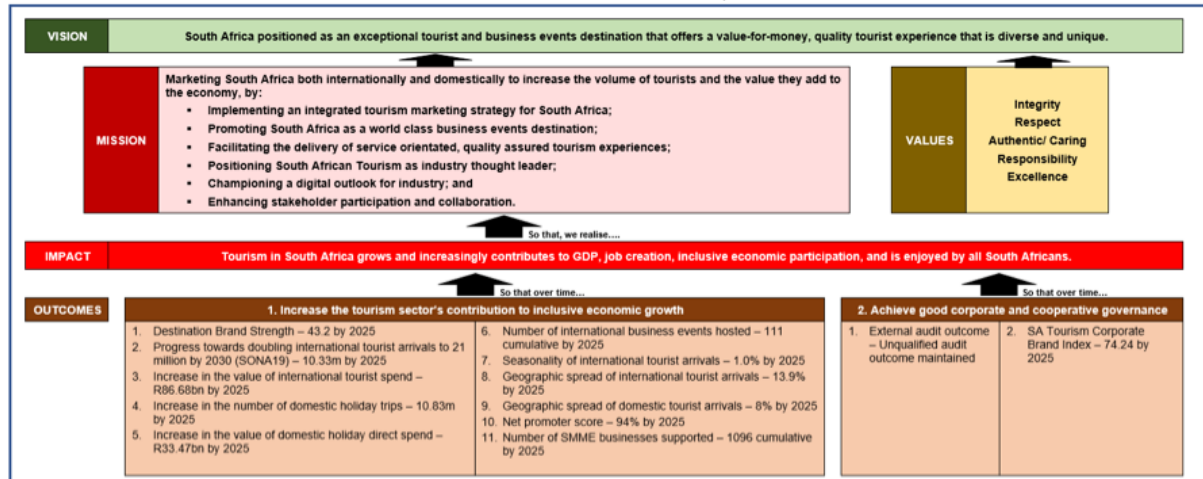
Source: South African Tourism PlanCon, August 2022

1.2.2.   PROGRESS AGAINST THE OUTCOME FIVE-YEAR TARGETS

Progress to date against the five-year targets reflected in the Five-Year Strategic Plan for 2020-2025 is as follows:

OUTCOME	AMENDED IN ANNEXURE A OF 2021/22 APP			PROGRESS TO DATE 2023
	OUTCOME INDICATOR	BASELINE (2019/20)	FIVE-YEAR TARGET (TO MARCH 2025)	
1. Increase the tourism sector's contribution to inclusive economic growth	Brand Strength Index	41.0	44.7	FY20/21: Not done due to internal challenges
				FY21/22: Not done due to COVID-19.
				FY22/23: 43.8
				FY23/24: Information due by March 2024.
	Progress towards doubling international tourist arrivals to 21 million by 2030 (SONA 2019)	10.3 million	Increase international tourist arrivals with 6.0% annually by 2024	FY20/21: 760,080
				FY21/22: 2.9 million
				FY22/23: 6.8 million
				FY23/24: 4 767 385 (Apr to Oct)
	Increase in the value of international tourist spend	R87.4 billion	R90.7 billion	FY20/21: R7.4 billion
				FY21/22: R26.7 billion
				FY22/23: R74.6 billion

OUTCOME	AMENDED IN ANNEXURE A OF 2021/22 APP			PROGRESS TO DATE 2023
	OUTCOME INDICATOR	BASELINE (2019/20)	FIVE-YEAR TARGET (TO MARCH 2025)	
				FY23/24: R44.0 billion (Apr to Sept)
	Increase in the number of domestic holiday trips	7.1 million	8.3 million	FY20/21: 3.07 million
				FY21/22: 4.6 million
				FY22/23: 9.9 million
				FY23/24: 6.5 million (Apr to Sept)
	Increase in the value of domestic holiday direct spend	R17.3 billion	R19.5bn	FY20/21: R12.07 billion
				FY21/22: R25.8 billion
				FY22/23: R47.8 billion
				FY23/24: R28.2 billion (Apr to Sept)
	Seasonality of international tourist arrivals	1.3%	1.3%	FY20/21: Not tracked due to COVID-19.
				FY21/22: 1.0%
				FY22/23: 1.0%
				FY23/24: Information due in July 2024.
	Geographic spread of international tourist arrivals	20.0%	13.9%	FY20/21: 13.8%
				FY21/22: 12.2%
				FY22/23: 11.0%
				FY23/24: 8.9% (Apr to Oct)
	Geographic spread of domestic tourist arrivals	8.0%	8.0%	FY20/21: 4.0%
				FY21/22: 2.6%
				FY22/23: 1.8%
				FY23/24: 2.1% (Apr-Oct)
	Number of international business events hosted	230	111 (cumulative 2020/21-2024/25)	FY20/21: 0
				FY21/22: 6
				FY22/23: 49
				FY23/24: Information due in March 2024.
	Number of SMME businesses supported	182	1,096 (cumulative 2020/21-2024/25)	FY20/21: 515
				FY21/22: 1690

OUTCOME	AMENDED IN ANNEXURE A OF 2021/22 APP			PROGRESS TO DATE 2023
	OUTCOME INDICATOR	**BASELINE (2019/20)**	**FIVE-YEAR TARGET (TO MARCH 2025)**	
				FY22/23: 628
				FY23/24: 717
2. Achieve good corporate and cooperative governance	External audit outcome	Unqualified audit outcome	Unqualified audit outcome maintained	FY20/21: Qualified
				FY21/22: Unqualified
				FY22/23: Unqualified
				FY23/24: Information due in August 2024
	South African Tourism Corporate Reputation Index	N/A Baseline to be determined in 2021/22	Improve from 68.24 (baseline established in FY 2021/22)	FY20/21: First study done in FY21/22
				FY21/22: 68.24
				FY22/23: 74.65
				FY23/24: Information due in March 2024

The assessment reflects the significant impact of COVID-19 on progress towards the outcome targets set in 2020. The stated aim is to achieve or exceed the pre-COVID-19 levels in the key tourism metrics.

The strategic framework remains relevant to inform the work of South African Tourism for the remainder of the term to 2025 and, therefore, informs this 2024/25 APP.

Based on the current strategic guiding documents and priorities, the performance plan for FY2024/25 is reflected in Part C.

PART C: MEASURING OUR PERFORMANCE

Informed by the legislative and policy mandates and the strategic focus, the 2020-2025 Strategic Plan presents the impact statement of South African Tourism as:

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

The Five-Year Strategic Plan 2020-2025 presents the outcomes for the five years, aligned to the NDP, MTSF, and the Tourism Sector Recovery Plan.

1. INSTITUTIONAL PROGRAMME PERFORMANCE INFORMATION

South African Tourism is constituted by five budget programmes, which inform this APP:

Programme	Programme Purpose
Programme 1: **Corporate Support**	▪ To provide effective support services to the organisation, as well as to ensure compliance with statutory requirements; and ▪ To ensure strategy development and integration with business performance monitoring, governance, and evaluation.
Programme 2: **Business Enablement**	▪ To enhance collaboration with various stakeholders; and ▪ To provide centralised tourism intelligence to support evidence-based decision-making.
Programme 3: **Leisure Tourism Marketing**	▪ To create demand through travel acquisition and growing brand equity for South Africa as a leisure and business events destination in identified markets.
Programme 4: **Business Events**	▪ To grow the nation's business events industry.
Programme 5: **Tourist Experience**	▪ To ensure the delivery of quality assured tourist/visitor experiences, which are diverse, unique, and enriched.

The above programmes contribute to the attainment of the outcomes through programme level outputs, output indicators, annual and quarterly targets, as reflected in the sections below.

1.1. PROGRAMME 1: CORPORATE SUPPORT

1.1.1. PROGRAMME PURPOSE

The Corporate Support Programme includes the following business units:

Business Unit	Purpose
Governance, Risk, Compliance and Company Secretariat	To provide efficient, effective, and proactive legal, governance, enterprise risk, and compliance support services to South African Tourism.
Internal Audit	To provide independent and objective assurance and consulting activity designed to add value and improve the organisation's operations.
Finance and Supply Chain Management, including Facilities	To provide and manage effective end-to-end financial management and supply chain support services to the organisation.
Human Capital Management	To build an inspired and energised organisation and ensure that the organisation has the necessary skills and capacity to operate successfully.
Information Communication and Technology (ICT)	To create business value by delivering ICT-related systems and services that increase operational efficiency and effectiveness.
Office of the Chief Executive Officer: Manager in the Office of the Chief Executive Officer	To provide strategic support to the Chief Executive Officer to achieve the mandate and outcomes of South African Tourism.
Office of the Chief Executive Officer: Strategic Planning, Evaluation and Programme Management	To ensure strategy development and integration with business performance monitoring, evaluation, and reporting.

In contributing towards the South African Tourism impact of: "tourism in South Africa grows and increasingly contributes to GDP, job creation, inclusive economic participation, and is enjoyed by all South Africans", the Corporate Support Programme delivers against the following outcome and five-year targets in the approved Five-Year Strategic Plan 2020-2025:

Institutional Outcome	Sub-Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)
2. Achieve good corporate and cooperative governance	Improved corporate reputation	External audit outcome	Unqualified audit outcome	Unqualified audit outcome maintained
		South African Tourism Corporate Brand Index	N/A Baseline to be determined in 2021/22	Improve from 68.24 (baseline established in FY 2021/22)

The FY2024/25 performance plan of Programme 1 is reflected in the log frame tables below:

1.1.2. PROGRAMME 1: OUTCOMES, OUTPUTS, OUTPUT INDICATORS, AND TARGETS

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
2. Achieve good corporate and cooperative governance	Improved corporate reputation	2.1. Sound governance and internal control environment	2.1.1. Improved risk maturity level	N/A	N/A	Improved risk maturity level from 2 to 3	Improved risk maturity level up by one level from the prior assessment	Improved risk maturity level up by one level from the prior assessment	Maintain risk maturity level	Maintain risk maturity level
			2.1.2 Corporate Compliance Campaign (Operation Clean Audit) implemented	N/A	N/A	N/A	FY2023/24 Corporate Compliance Campaign (Operation Clean Audit) implemented	FY2024/25 Corporate Compliance Campaign (Operation Clean Audit) implemented	FY2025/26 Corporate Compliance Campaign (Operation Clean Audit) implemented	FY2026/27 Corporate Compliance Campaign (Operation Clean Audit) implemented
			2.1.3. Percentage implementation of valid internal and external audit recommendations	95% implementation of valid audit recommendations	100% implementation of valid audit recommendations	100% implementation of valid audit recommendations	100% implementation of valid audit recommendations	100% implementation of valid audit recommendations	100% implementation of valid audit recommendations	100% implementation of valid audit recommendations
		2.2. Optimal Financial management	2.2.1. Percentage payment of compliant invoices within thirty days from date of receipt	100% payment of compliant invoices within thirty days from date of receipt	100% payment of compliant invoices within thirty days from date of receipt	100% payment of compliant invoices within thirty days from date of receipt	100% payment of compliant invoices within thirty days from date of receipt	100% payment of compliant invoices within thirty days from date of receipt	100% payment of compliant invoices within thirty days from date of receipt	100% payment of compliant invoices within thirty days from date of receipt
			2.2.2. Number of initiatives to promote integrity and ethical conduct in Supply	N/A	N/A	N/A	6 SCM ethics and integrity initiatives implemented	6 SCM ethics and integrity initiatives implemented	6 SCM ethics and integrity initiatives implemented	6 SCM ethics and integrity initiatives implemented

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
			Chain Management (SCM) implemented as per Section 57 of the PFMA							
		2.3. Revenue enhancement and cost optimisation	2.3.1. Budget Optimisation Strategy implemented	N/A	N/A	Budget optimisation benchmarking study commenced	Finalised Budget Optimisation Strategy	Budget Optimisation Strategy implemented and reviewed	Budget Optimisation Strategy implemented and reviewed	Budget Optimisation Strategy implemented and reviewed
		2.4. Optimal Human capital management and development	2.4.1. Staff Engagement Survey Improvement Plan implemented	3.75	Staff engagement survey was not undertaken in FY21/22	2.3	3.13	Staff Engagement Survey Two-Year Improvement Plan implemented	Staff Engagement Survey Two-Year Improvement Plan implemented	Staff Engagement Survey Two-Year Improvement Plan developed and implemented
			2.4.2. Organisational Effectiveness Assessment Improvement Plan implemented	N/A	N/A	N/A	N/A	Organisational Effectiveness Assessment Three-Year Improvement Plan implemented	Organisational Effectiveness Assessment Three-Year Improvement Plan implemented	Organisational Effectiveness Assessment Three-Year Improvement Plan implemented
2. Achieve good corporate and	Relevant tourism intelligence	2.5. Enhanced ICT Governance Framework	2.5.1. ICT Governance Framework implemented	N/A	N/A	ICT Governance Framework developed and approved	FY2023/24 Roadmap for ICT Governance	FY2024/25 Roadmap for ICT Governance	FY2025/26 Roadmap for ICT Governance	FY2026/27 Roadmap for ICT Governance

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS			
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	
cooperative governance	and digital ecosystem	and internal controls				FY2023/24 implementation roadmap for ICT Governance Framework developed	Framework implemented	Framework implemented	Framework implemented	Framework implemented	

1.1.3. PROGRAMME 1: OUTPUT INDICATORS: ANNUAL AND QUARTERLY TARGETS

OUTPUT	OUTPUT INDICATORS	2024/25 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 **Apr - Jun 2024**	**Q2** **Jul - Sep 2024**	**Q3** **Oct - Dec 2024**	**Q4** **Jan - Mar 2025**
2.1. Sound governance and internal control environment	2.1.1. Improved risk maturity level	Improved risk maturity level up by one level from the prior assessment	Implement the recommendations from the FY2023/24 Risk Management Maturity Assessment Report	Implement the recommendations from the FY2023/24 Risk Management Maturity Assessment Report	Implement the recommendations from the FY2023/24 Risk Management Maturity Assessment Report	Conclude the implementation of the recommendations from the FY2023/24 Risk Management Maturity Assessment Report
					Conduct FY2024/25 Risk Management Maturity Assessment	Table FY2024/25 Risk Management Maturity Assessment Report at ExCo
	2.1.2. Corporate Compliance Campaign (Operation Clean Audit) implemented	FY2024/25 Corporate Compliance Campaign (Operation Clean Audit) implemented	Implement the Quarter 1 milestones in Corporate Compliance Campaign	Implement the Quarter 2 milestones in Corporate Compliance Campaign	Implement the Quarter 3 milestones in Corporate Compliance Campaign	Implement the Quarter 4 milestones in Corporate Compliance Campaign
	2.1.3. Percentage implementation of valid internal and external audit recommendations	100% implementation of valid audit recommendations	25% implementation of valid audit recommendations	50% implementation of valid audit recommendations	65% implementation of valid audit recommendations	100% implementation of valid audit recommendations
2.2. Optimal financial management	2.2.1. Percentage payment of compliant invoices within thirty days from date of receipt	100% payment of compliant invoices within thirty days from date of receipt	100% payment of compliant invoices within thirty days from date of receipt	100% payment of compliant invoices within thirty days from date of receipt	100% payment of compliant invoices within thirty days from date of receipt	100% payment of compliant invoices within thirty days from date of receipt

OUTPUT	OUTPUT INDICATORS	2024/25 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2024	Q2 Jul - Sep 2024	Q3 Oct - Dec 2024	Q4 Jan - Mar 2025
	2.2.2. Number of initiatives to promote integrity and ethical conduct in Supply Chain Management (SCM) implemented as per Section 57 of the PFMA	6 SCM ethics and integrity initiatives implemented	Implement in Quarter 1: 1. Letters confirming budget allocation and related accountability issued to business unit managers 2. Capability building for procurement committees 3. Create awareness organisation-wide on SCM code of conduct	Implement in Quarter 2: 4. Monitoring of non-compliance to SCM policies and procedures 5. Conduct organisation-wide training on Ethics in the Public Service	Implement in Quarter 3: 2. Capability building for procurement committees 4. Monitoring of non-compliance to SCM policies and procedures	Implement in Quarter 4: 4. Monitoring of non-compliance to SCM policies and procedures 6. Conduct organisation-wide PFMA training
2.3. Revenue enhancement and cost optimisation	2.3.1. Budget Optimisation Strategy implemented	Budget Optimisation Strategy implemented and reviewed	Develop FY2024/25 Budget Optimisation Strategy Implementation Plan	Implement the Quarter 2 deliverables of the FY2024/25 Budget Optimisation Strategy Implementation Plan	Implement the Quarter 3 deliverables of the FY2024/25 Budget Optimisation Strategy Implementation Plan	Implement the Quarter 4 deliverables of the FY2024/25 Budget Optimisation Strategy Implementation Plan
			Implement the Quarter 1 deliverables of the FY2024/25 Budget Optimisation Strategy Implementation Plan			Review Budget Optimisation Strategy and Policy based on learnings from implementation
2.4. Optimal Human capital management and development	2.4.1. Staff Engagement Survey Improvement Plan implemented	Staff Engagement Survey Two-Year Improvement Plan implemented	Staff Engagement Survey Two-Year Improvement Plan developed, arising from the prior year's staff engagement assessment	Implement the Quarter 2 deliverables of the Staff Engagement Survey Two-Year Improvement Plan	Implement the Quarter 3 deliverables of the Staff Engagement Survey Two-Year Improvement Plan	Implement the Quarter 4 deliverables of the Staff Engagement Survey Two-Year Improvement Plan
			Implement the Quarter 1 deliverables of the Staff Engagement Survey Two-Year Improvement Plan			

OUTPUT	OUTPUT INDICATORS	2024/25 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 **Apr - Jun 2024**	**Q2** **Jul - Sep 2024**	**Q3** **Oct - Dec 2024**	**Q4** **Jan - Mar 2025**
	2.4.2. Organisational Effectiveness Assessment Improvement Plan implemented	Organisational Effectiveness Assessment Three-Year Improvement Plan implemented	Conduct Organisational Effectiveness Assessment	Organisational Effectiveness Assessment Three-Year Improvement Plan developed, arising from the assessment Implement the Quarter 2 deliverables of the Organisational Effectiveness Assessment Three-Year Improvement Plan	Implement the Quarter 3 deliverables of the Organisational Effectiveness Assessment Three-Year Improvement Plan	Implement the Quarter 4 deliverables of the Organisational Effectiveness Assessment Three-Year Improvement Plan
2.5. Enhanced ICT governance framework and internal controls	2.5.1. ICT Governance Framework implemented	FY2024/25 Roadmap for ICT Governance Framework implemented	Implement the Quarter 1 deliverables of the FY2024/25 roadmap of the ICT Governance Framework	Implement the Quarter 2 deliverables of the FY2024/25 roadmap of the ICT Governance Framework	Implement the Quarter 3 deliverables of the FY2024/25 roadmap of the ICT Governance Framework	Implement the Quarter 4 deliverables of the FY2024/25 roadmap of the ICT Governance Framework Develop the FY2025/26 roadmap for ICT Governance Framework

1.1.4. PROGRAMME 1: EXPLANATION OF PLANNED PERFORMANCE OVER THE MEDIUM-TERM PERIOD

Enhancing South African Tourism's corporate brand, distinct from the destination brand, will be further elevated in the FY2024/25. A central tenant of the corporate brand is a well-governed, well-managed, and credible organisation. An effective governance and internal control environment, inclusive of risk management, compliance, as well as a compliant and ethical SCM, remains a focus as we amplify our efforts to attain a clean audit outcome.

The Auditor-General Management and Audit Report provides recommendations to senior management to rectify weaknesses in financial management, performance management, compliance with legislation, and service delivery. The recommendations focus on addressing the underlying root causes of these weaknesses. The Internal Audit business unit provides independent assurance that protects South African Tourism against risk, informs strategic decision-making, and improves overall performance.

Operation Clean Audit is a proactive initiative to improve audit outcomes by strengthening internal controls and minimising and/or preventing compliance issues that ultimately lead to negative audit findings. Following the annual audit by the Auditor-General and, where findings have been identified, a clear audit action plan is developed and tracked monthly. This is done in collaboration with the entity's internal assurance partners. This initiative has the potential to assist the business broadly, reduce adverse audit outcomes, and encourage collective ownership.

To foster effective risk management, South African Tourism will proactively manage risk and continuously monitoring the risk profile. The focus is to ensure that risk management is effectively embedded within the organisation and, therefore, implementation of the risk maturity recommendations is critical in progressing to the desired risk maturity level. This incorporates the risk appetite and tolerance into decision-making, to ensure that the entity's risks are aligned to the set appetite and tolerance thresholds and to aid the decision-making processes. South African Tourism will consider the assessment of risks for all strategic projects, which will assist with the identification of emerging risks at both at operational and strategic levels.

South African Tourism will deploy its people, processes, and financial resources to improve its effectiveness, as well as cost and operational efficiency. South African Tourism will consider new income streams and possible commercialisation of certain services to ensure that adequate financial resources are available for core business functions. Through the FY2024/25 Roadmap for ICT Governance Framework, several initiatives will be implemented to improve efficiencies with the ICT space.

Through the Corporate Support Programme, South African Tourism will continue to strive for delivering efficiency within the organisation through robust and coordinated planning and optimising organisational and individual performance.

The priority focus on women, youth, and persons with disabilities will be addressed in this programme at an operational level, through the implementation of the Employment Equity Plan, the CSI Programme, and the B-BBEE Verification Programme.

1.1.5.   PROGRAMME 1: RESOURCE CONSIDERATIONS

Programme 1: Administration	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
(R'000)	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
Economic classification:							
Compensation of employees	5 461	56 794	59 258	70 605	66 044	69 069	71 947
Goods and services	50 773	91 685	144 460	133 420	124 801	130 517	135 956
Depreciation	5 961	6 289	8 560	-	-	-	-
Total expenses	**62 195**	**154 768**	**212 278**	**204 025**	**190 845**	**199 586**	**207 903**
Staff complement	59						

1.2.   PROGRAMME 2: BUSINESS ENABLEMENT

1.2.1.   PROGRAMME PURPOSE

The Business Enablement Programme includes the following business units:

Business Unit	Purpose
DigiTech	To enable visualisation and interaction with data obtained from digital channels, dynamic reporting, and data-driven digital marketing execution.
Analytics and Insights	To provide centralised tourism intelligence and establish South African Tourism as a thought leader in the sector.
Industry and Government Relations	To enhance collaboration with various stakeholders.

In contributing towards the South African Tourism impact of: **"***tourism in South Africa grows and increasingly contributes to GDP, job creation, inclusive economic participation, and is enjoyed by all South Africans",*** the Business Enablement Programme delivers against the following outcome and five-year target in the approved Five-Year Strategic Plan 2020-2025:

Institutional Outcome	Sub-Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)
2. Achieve good corporate and cooperative governance	Relevant tourism intelligence and digital ecosystem	South African Tourism Corporate Brand Index	N/A Baseline to be determined in 2021/22	Improve from 68.24 (baseline established in FY 2021/22)

The FY2024/25 performance plan of Programme 2 is reflected in the log frame tables below:

1.2.2. PROGRAMME 2: OUTCOMES, OUTPUTS, OUTPUT INDICATORS, AND TARGETS

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
2. Achieve good corporate and cooperative governance	Relevant tourism intelligence and digital ecosystem	2.6. Integrated Digital and Analytics Operating Framework	2.6.1. Integrated Digital and Analytics Operating Framework Annual Roadmap implemented	N/A	N/A	Integrated Digital and Analytics Operating Framework and annual roadmap implemented	Implementation of Year 2 Roadmap of the Integrated Digital and Analytics Operating Framework	Implementation of Year 3 Roadmap of the Integrated Digital and Analytics Operating Framework	Implementation of Year 4 Roadmap of the Integrated Digital and Analytics Operating Framework Review Integrated Digital and Analytics Operating Framework, and develop year one annual roadmap	Implementation of Year 1 Roadmap of the Integrated Digital and Analytics Operating Framework
		2.7. Tourism information gathering	2.7.1. Number of tourism information tracking surveys completed	N/A	N/A	N/A	5 tourism information tracking surveys completed	5 tourism information tracking surveys completed	5 tourism information tracking surveys completed	5 tourism information tracking surveys completed
		2.8. Tourism trends analysis	2.8.1. Number of trend analysis reports	N/A	N/A	N/A	4 quarterly trend analysis reports	4 quarterly trend analysis reports	4 quarterly trend analysis reports	4 quarterly trend analysis reports
		2.9. Tourism thought leadership	2.9.1. Number of thought leadership pieces published	N/A	N/A	N/A	8 thought leadership pieces published	10 thought leadership pieces published	12 thought leadership pieces published	12 thought leadership pieces published

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
		2.10. Tourism research	2.10.1. Number of tourism statistics and performance reports	N/A	N/A	N/A	4 tourism statistics and performance reports	4 tourism statistics and performance reports	4 tourism statistics and performance reports	4 tourism statistics and performance reports
	Improved corporate reputation	2.11. Stakeholder management promoting whole of tourism approach	2.11.1. South African Tourism Corporate Brand Index	N/A	Conducted a survey to establish a new baseline for South African Tourism Corporate Brand Index	74.65 South African Tourism Corporate Brand Index	72.24 South African Tourism Corporate Brand Index	74.24 South African Tourism Corporate Brand Index	76.24 South African Tourism Corporate Brand Index	78.24 South African Tourism Corporate Brand Index

1.2.3. PROGRAMME 2: OUTPUT INDICATORS: ANNUAL AND QUARTERLY TARGETS

OUTPUT	OUTPUT INDICATORS	2024/25 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2024	Q2 Jul - Sep 2024	Q3 Oct - Dec 2024	Q4 Jan - Mar 2025
2.6. Integrated Digital and Analytics Operating Framework	2.6.1. Integrated Digital and Analytics Operating Framework Annual Roadmap implemented	Implementation of Year 3 Roadmap of the Integrated Digital and Analytics Operating Framework	Implement the Quarter 1 milestones as per the Year 3 Roadmap of the Integrated Digital and Analytics Operating Framework	Implement the Quarter 2 milestones as per the Year 3 Roadmap of the Integrated Digital and Analytics Operating Framework	Implement the Quarter 3 milestones as per the Year 3 Roadmap of the Integrated Digital and Analytics Operating Framework	Implement the Quarter 4 milestones as per the Year 3 Roadmap of the Integrated Digital and Analytics Operating Framework
						Finalisation of the Year 4 Roadmap of the Integrated Digital and Analytics Operating Framework
2.7. Tourism information gathering	2.7.1. Number of tourism information tracking surveys completed	5 tourism information tracking surveys completed	-	International Leisure Brand Tracker Global Fieldwork Report	International Leisure Brand Tracker Global Fieldwork Report	International Leisure Brand Tracker Global Fieldwork Report
			Departure Survey Fieldwork Report	Departure Survey Fieldwork Report	Departure Survey Fieldwork Report	Departure Survey Fieldwork Report
			Domestic Tourism Survey Fieldwork Report	Domestic Tourism Survey Fieldwork Report	Domestic Tourism Survey Fieldwork Report	Domestic Tourism Survey Fieldwork Report
			Business Events Brand Equity Survey Fieldwork Report	Business Events Brand Equity Survey Fieldwork Report	Business Events Brand Equity Survey Fieldwork Report	Business Events Brand Equity Survey Fieldwork Report
			Domestic Leisure Brand Tracker Fieldwork Report	Domestic Leisure Brand Tracker Fieldwork Report	Domestic Leisure Brand Tracker Fieldwork Report	Domestic Leisure Brand Tracker Fieldwork Report
2.8. Tourism trends analysis	2.8.1. Number of trend analysis reports	4 quarterly trend analysis reports	1 Quarterly Trend Analysis Report	1 Quarterly Trend Analysis Report	1 Quarterly Trend Analysis Report	1 Quarterly Trend Analysis Report

OUTPUT	OUTPUT INDICATORS	2024/25 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 **Apr - Jun 2024**	**Q2** **Jul - Sep 2024**	**Q3** **Oct - Dec 2024**	**Q4** **Jan - Mar 2025**
2.9. Tourism thought leadership	2.9.1. Number of thought leadership pieces published	10 thought leadership pieces published	2 thought leadership pieces published	3 thought leadership pieces published	2 thought leadership pieces published	3 thought leadership pieces published
2.10. Tourism research	2.10.1. Number of tourism statistics and performance reports	4 tourism statistics and performance reports	1 tourism statistics and performance report	1 tourism statistics and performance report	1 tourism statistics and performance report	1 tourism statistics and performance report
2.11. Stakeholder management promoting whole of tourism approach	2.11.1. South African Tourism Corporate Brand Index	74.24 South African Tourism Corporate Brand Index	Review the Stakeholder Engagement Framework on the basis of the FY2023/24 South African Tourism Corporate Brand Index	Develop the Stakeholder Engagement Framework Implementation Plan on the basis of the revised Stakeholder Engagement Framework	Implement the Quarter 3 actions from Stakeholder Engagement Framework Implementation Plan	Implement the Quarter 4 actions from Stakeholder Engagement Framework Implementation Plan
				Implement the Quarter 2 actions from Stakeholder Engagement Framework Implementation Plan		Conduct FY2024/25 survey, reflecting 74.24 South African Tourism Corporate Brand Index

1.2.4. PROGRAMME 2: EXPLANATION OF PLANNED PERFORMANCE OVER THE MEDIUM-TERM PERIOD

The success of delivering the mandate of tourism is partially dependent on coordination among different stakeholders. South African Tourism will continue to strength collaboration with stakeholders by delivering a revised Stakeholder Engagement Framework. This framework is further aimed at driving a new vision to become a responsive organisation for the tourism industry that is purpose-driven, collaborative, data-driven, agile, and efficient.

The South African Tourism Corporate Brand Index is the key tool in determining the status of the organisation's corporate brand. This assessment identifies areas of corporate brand management that South African Tourism needs to enhance in the coming fiscal.

Data and the intelligence derived from data and research are strategic assets that underpin the success of all modern organisations. The Business Enablement Programme will continue to deliver insights that are based on quality research and analytics. In support of South African Tourism's journey to be an insights-led organisation, demand-driven research will be conducted to enable business and sector growth.

Numerous benefits will be realised from the Digital Transformation Programme, including operational and cost efficiencies. While the programme is long term in nature, the implementation of key components will support strategic adaptability and an integrated operating model in the short term, as well as the implementation of a data strategy that will drive a digital culture across the organisation and the tourism sector.

1.2.5. PROGRAMME 2: RESOURCE CONSIDERATIONS

Programme 2: Business Enablement (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
Economic classification:							
Compensation of employees	14 717	15 306	10 942	12 368	11 569	12 099	12 603
Goods and services	25 124	65 679	59 600	57 601	53 880	56 347	58 695
Total expenses	**39 841**	**80 985**	**70 543**	**69 968**	**65 448**	**68 446**	**71 298**
Staff complement	13						

1.3. PROGRAMME 3: LEISURE TOURISM MARKETING

1.3.1. PROGRAMME PURPOSE

The Leisure Tourism Marketing Programme includes the work of the following business units:

Business Unit	Purpose
Brand and Marketing	To grow brand equity to create tourism demand for South Africa as a leisure and business events destination in identified markets.
Global PR and Communications	To showcase South Africa's exceptional experiences and people whilst showcasing South African Tourism and the greater tourism sector's contribution to economic growth and employment.
Tourism Execution	To create demand through travel acquisition by implementing integrated marketing communication and working with the distribution channels to sell South Africa as a destination.

In contributing towards the South African Tourism impact of: "tourism in South Africa grows and increasingly contributes to GDP, job creation, inclusive economic participation, and is enjoyed by all South Africans", the Leisure Tourism Marketing Programme delivers against the following outcome and five-year targets in the approved Five-Year Strategic Plan 2020-2025:

Institutional Outcome	Sub-Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)
1. Increase the tourism sector's contribution to inclusive economic growth	Demand creation	Progress towards doubling international tourist arrivals to 21 million by 2030 (SONA 2019)	10.3 million	Increase international tourist arrival with 6% annually by 2024
		Rand value of international tourist spend	R87.4 billion	R90.7bn
		Number of domestic holiday trips	7.1 million	8.3 million
		Rand value of domestic holiday direct spend	R17.3 billion	R19.5bn

The FY2024/25 performance plan of Programme 3 is reflected in the log frame tables below:

1.3.2.   PROGRAMME 3: OUTCOMES, OUTPUTS, OUTPUT INDICATORS, AND TARGETS

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
1. Increase the tourism sector's contribution to inclusive economic growth	Demand creation	1.1. Global brand alignment	1.1.1. Integrated Tourism Brand Strategy developed	N/A	N/A	N/A	N/A	Integrated Tourism Brand Strategy developed for FY2025/26	Integrated Tourism Brand Strategy implemented	N/A
			1.1.2. Global Tourism Brand Campaign implemented	N/A	One annual campaign was launched with the global roll-out	FY2022/23 Global Tourism Brand Campaign Plan was developed with 7 out of 10 planned activities implemented	FY2023/24 Global Tourism Brand Campaign Plan implemented	FY2024/25 Global Tourism Brand Campaign Plan implemented	FY2025/26 Global Tourism Brand Campaign Plan implemented	FY2026/27 Global Tourism Brand Campaign Plan implemented
		1.2. Localised marketing campaigns implemented to drive demand in Europe MPIF hubs	1.2.1. Number of Europe hubs marketing campaigns implemented	N/A	N/A	4 marketing campaigns implemented	4 Europe Hub localised brand campaigns implemented	4 Europe Hub localised brand campaigns implemented	4 Europe Hub localised brand campaigns implemented	4 Europe Hub localised brand campaigns implemented
		1.3. Europe brand affinity initiatives	1.3.1. Number of distribution channel initiatives implemented in Europe	N/A	N/A	N/A	30 distribution channel initiatives implemented in market	30 distribution channel initiatives implemented in market	30 distribution channel initiatives implemented in market	30 distribution channel initiatives implemented in market

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
		1.4. Localised marketing campaigns implemented to drive demand in Americas MPIF markets	1.4.1. Number of marketing campaigns implemented in Americas hubs	N/A	N/A	2 marketing campaigns implemented	2 Americas Hub localised brand campaigns implemented	2 localised brand campaigns implemented in Americas hubs	2 localised brand campaigns implemented in Americas hubs	2 localised brand campaigns implemented in Americas hubs
		1.5. Americas brand affinity initiatives	1.5.1. Number of distribution channel initiatives implemented in Americas	N/A	N/A	N/A	12 distribution channel initiatives implemented in market in total for Americas combined	12 distribution channel initiatives implemented in market	12 distribution channel initiatives implemented in market in total for Americas combined	12 distribution channel initiatives implemented in market in total for Americas combined
		1.6. Localised marketing campaigns implemented to drive demand in Embassy Support markets	1.6.1. Number of localised brand campaigns implemented in support of the Global Tourism Brand Campaign in Embassy Support markets	N/A	N/A	N/A	1 localised brand campaign implemented	1 localised brand campaign implemented	1 localised brand campaign implemented	2 localised brand campaigns implemented
		1.7. Embassy Support markets brand affinity initiatives	1.7.1. Number of distribution channel initiatives implemented in Embassy Support markets	N/A	N/A	N/A	12 distribution channel initiatives implemented in market	16 distribution channel initiatives implemented in market	16 distribution channel initiatives implemented in market	16 distribution channel initiatives implemented in market

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
		1.8 Localised marketing campaigns implemented to drive demand in Asia and Australasia	1.8.1 Number of localised brand campaigns implemented in Asia and Australasia	N/A	N/A	9 marketing campaigns implemented	4 localised brand campaigns implemented	4 localised brand campaigns implemented	4 localised brand campaigns implemented	4 localised brand campaigns implemented
		1.9 Asia and Australasia brand affinity initiatives	1.9.1 Number of distribution channel initiatives implemented in Asia and Australasia markets	N/A	N/A	N/A	8 distribution channel initiatives implemented in market	12 distribution channel initiatives implemented in market	10 distribution channel initiatives implemented in market	8 distribution channel initiatives implemented in market
		1.10. Regional (Africa) Tourism Campaign	1.10.1. Number of regional seasonal campaigns implemented	N/A	N/A	4 campaigns delivered	4 regional seasonal campaigns implemented	4 regional seasonal campaigns implemented	4 regional seasonal campaigns implemented	2 regional annual campaigns with seasonal messages implemented
		1.11 Regional (Africa) Brand Affinity initiatives	1.11.1 Number of distribution channel initiatives implemented in Regional (Africa) markets	N/A	N/A	N/A	16 distribution channel initiatives implemented in the market	26 distribution channel initiatives implemented in the market	26 distribution channel initiatives implemented in the market	26 distribution channel initiatives implemented in the market
		1.12. Domestic Tourism Campaign	1.12.1. Number of domestic seasonal	N/A	5 domestic deal driven campaigns implemented	3 domestic deal driven campaigns implemented	3 domestic seasonal campaigns implemented	3 domestic seasonal campaigns implemented	3 domestic seasonal campaigns implemented	3 domestic seasonal campaigns implemented

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
			campaigns implemented							
		1.13 Domestic Brand Affinity initiatives	1.13.1 Number of distribution channel initiatives implemented in the Domestic market	N/A	N/A	N/A	16 distribution channel initiatives implemented in the market	16 distribution channel initiatives implemented in the market	16 distribution channel initiatives implemented in the market	16 distribution channel initiatives implemented in the market
		1.14. Tourism economic impact communication	1.14.1. Annual Tourism Economic Impact Communication Plan implemented	N/A	N/A	N/A	4 Tourism economic impact communication activities	FY2024/25 Tourism Economic Impact Communication Plan implemented	FY2025/26 Tourism Economic Impact Communication Plan implemented	FY2026/27 Tourism Economic Impact Communication Plan implemented
		1.15. Global PR and communications	1.15.1. Annual Global PR and Communications Plan implemented	N/A	N/A	N/A	FY2023/24 Global PR and Communications Plan implemented	FY2024/25 Global PR and Communications Plan implemented	FY2025/26 Global PR and Communications Plan implemented	FY2026/27 Global PR and Communications Plan implemented

1.3.3. PROGRAMME 3: OUTPUT INDICATORS: ANNUAL AND QUARTERLY TARGETS

OUTPUT	OUTPUT INDICATORS	2024/25 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2024	Q2 Jul - Sep 2024	Q3 Oct - Dec 2024	Q4 Jan - Mar 2025
1.1. Global brand alignment	1.1.1. Integrated Tourism Brand Strategy developed	Integrated Tourism Brand Strategy developed for FY2025/26	Brand review concluded	Integrated Tourism Brand Strategy for FY2025/26 developed	Integrated Tourism Brand Strategy for FY2025/26 approved	Integrated Tourism Brand plans developed
	1.1.2. Global Tourism Brand Campaign implemented	FY2024/25 Global Tourism Brand Campaign Plan implemented	FY2024/25 Global Tourism Brand Campaign concluded and launched	FY2024/25 Global Tourism Brand Campaign Plan implemented	FY2024/25 Global Tourism Brand Campaign Plan implemented	FY2024/25 Global Tourism Brand Campaign Plan implemented
			Brand Toolkit created			
1.2 Localised marketing campaigns implemented to drive demand in Europe MPIF hubs	1.2.1. Number of Europe hubs marketing campaigns implemented	4 Europe hub localised brand campaigns implemented	Develop the annual localised campaign concept and implementation plan for each hub	Execute campaign for each hub	Campaign progress report per hub	Campaign progress report per hub
						Close out report and evaluate ROI per campaign per hub
1.3. Europe brand affinity initiatives	1.3.1. Number of distribution channel initiatives implemented in Europe	30 distribution channel initiatives implemented in market	Implement 12 distribution channel initiatives	Implement 8 distribution channel initiatives	Implement 6 distribution channel initiatives	Implement 4 distribution channel initiatives
1.4. Localised marketing campaigns implemented to drive demand in Americas MPIF markets	1.4.1. Number of marketing campaigns implemented in Americas hubs	2 localised brand campaigns implemented in Americas hubs	Develop the annual localised campaign concept and implementation plan for each hub	Execute campaign plan for each hub	Execute campaign plan for each hub	Execute campaign plan for each hub
1.5. Americas brand affinity initiatives	1.5.1. Number of distribution channel initiatives implemented in Americas	12 distribution channel initiatives implemented in market	Develop an annual distribution channel implementation plan	Implement 3 distribution channel initiatives	Implement 4 distribution channel initiatives	Implement 4 distribution channel initiatives

OUTPUT	OUTPUT INDICATORS	2024/25 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2024	Q2 Jul - Sep 2024	Q3 Oct - Dec 2024	Q4 Jan - Mar 2025
			Implement 1 distribution channel initiative			
1.6. Localised marketing campaigns implemented to drive demand in Embassy Support markets	1.6.1. Number of localised brand campaigns implemented in support of the Global Tourism Brand Campaign in Embassy Support markets	1 localised brand campaign implemented	Develop the annual localised campaign concept and implementation plan for Embassy Support markets	Execute campaign plan	Execute campaign plan	Execute campaign plan Close out report for Embassy Support markets
1.7. Embassy Support markets brand affinity initiatives	1.7.1. Number of distribution channel initiatives implemented in Embassy Support markets	16 distribution channel initiatives implemented in market	Implement 4 distribution channel initiatives	Implement 4 distribution channel initiatives	Implement 4 distribution channel initiatives	Implement 4 distribution channel initiatives
1.8 Localised marketing campaigns implemented to drive demand in Asia and Australasia	1.8.1 Number of localised brand campaigns implemented in Asia and Australasia	4 localised brand campaigns implemented	Develop the annual localised plan for each hub	Execute campaign plan for each hub	Execute campaign plan for each hub	Execute campaign plan for each hub
1.9 Asia and Australasia brand affinity initiatives	1.9.1. Number of distribution channel initiatives implemented in Asia and Australasia markets	12 distribution channel initiatives implemented in market	Implement 3 distribution channel initiatives	Implement 3 distribution channel initiatives	Implement 3 distribution channel initiatives	Implement 3 distribution channel initiatives
1.10. Regional (Africa) Tourism Campaign	1.10.1. Number of regional seasonal campaigns implemented	4 regional seasonal campaigns implemented	Develop the annual Africa localised campaign implementation plan with annual campaign concepts	Implement 360° West Africa and Central, East, and Land Africa markets Quarter 2 campaigns West Africa and Central East, and Land Africa Quarter 2 campaigns progress reports	Implement a 360° West Africa and Central, East, and Land Africa markets Quarter 3 campaigns Quarter 2 campaigns close-out reports Quarter 3 campaigns progress reports	Quarter 3 campaigns close-out reports

OUTPUT	OUTPUT INDICATORS	2024/25 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2024	Q2 Jul - Sep 2024	Q3 Oct - Dec 2024	Q4 Jan - Mar 2025
1.11 Regional (Africa) brand affinity initiatives	1.11.1 Number of distribution channel initiatives implemented in Regional (Africa) markets	26 distribution channel initiatives implemented in market	Develop an annual distribution channel Implementation plan Implement 2 distribution channel initiatives	Implement 8 distribution channel initiatives	Implement 8 distribution channel initiatives	Implement 8 distribution channel initiatives
1.12. Domestic Tourism Campaign	1.12.1. Number of domestic seasonal campaigns implemented	3 domestic seasonal campaigns implemented	Develop and approve annual seasonal campaign and implementation plan with annual campaign concepts	Implement Sho't Left Travel Week campaign Sho't Left Travel Week progress report	Sho't Left Travel Week Campaign close-out report Implement Sho't Left Summer Deal Driven Campaign Sho't Left Summer Deal Driven Campaign progress report	Sho't Left Summer Deal Driven Campaign close-out report Implement Sho't Left Easter Deal Driven Campaign Sho't Left Easter Deal Driven Campaign progress report
1.13 Domestic brand affinity initiatives	1.13.1 Number of distribution channel initiatives implemented in the Domestic market	16 distribution channel initiatives implemented in market	4 distribution channel initiatives implemented in market	4 distribution channel initiatives implemented in market	4 distribution channel initiatives implemented in market	4 distribution channel initiatives implemented in market
1.14. Tourism economic impact communication	1.14.1. Annual Tourism Economic Impact Communication Plan implemented	FY2024/25 Tourism Economic Impact Communication Plan implemented	Develop and approve FY2024/25 Tourism Economic Impact Communication Plan	Implement the Quarter 2 milestones as per the FY2024/25 Tourism Economic Impact Communication Plan	Implement the Quarter 3 milestones as per the FY2024/25 Tourism Economic Impact Communication Plan	Implement the Quarter 4 milestones as per the FY2024/25 Tourism Economic Impact Communication Plan
1.15. Global PR and communications	1.15.1. Annual Global PR and Communications Plan implemented	FY2024/25 Global PR and Communications Plan implemented	Develop and approve FY2024/25 Global PR and Communications Plan	Implement the Quarter 2 milestones as per the FY2024/25 Global PR and Communications Plan	Implement the Quarter 3 milestones as per the FY2024/25 Global PR and Communications Plan	Implement the Quarter 4 milestones as per the FY2024/25 Global PR and Communications Plan

1.3.4. PROGRAMME 3: EXPLANATION OF PLANNED PERFORMANCE OVER THE MEDIUM-TERM PERIOD

The Leisure Tourism Marketing Programme leads the execution of the policy directive to revitalise the destination brand and contribute towards increased arrivals.

Tourism Decision Metrics, the forecasting tool developed by Oxford Economics and used by South African Tourism, estimated that South Africa would receive 16.5 million arrivals by 2030, or 0.74% of global market share if specific interventions are not made to grow tourism. This was prior to the COVID-19 pandemic, which has significantly affected those projections. A new growth approach is critical to achieve any additional tourist arrivals beyond those reflected by the projections.

It is imperative that the Global Brand Campaign is localised for each of South Africa's priority source markets to ensure consumer-relevant integrated marketing communication and impactful media strategies that will drive demand, brand equity, and conversion.

Tourism Execution will deliver localised marketing campaigns to both consumer and the distribution channel to generate demand for South Africa's wildlife, stunning landscapes, rich cultural heritage, vibrant cities, and adventure, whilst promoting sustainable tourism practices to protect the environment and local communities.

Through Global Public Relations (PR) & Communications, South African Tourism will continue to position South Africa as an attractive and safe destination (destination brand PR). As a part of this focus area, South African Tourism will advance the positioning of the entity as a formidable thought leader within the tourism sector (corporate brand PR).

1.3.5. PROGRAMME 3: RESOURCE CONSIDERATIONS

Programme 3: Leisure Tourism Marketing (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
Economic classification:							
Compensation of employees	119 163	123 929	107 579	126 886	118 689	124 125	129 298
Goods and services	260 237	917 296	827 442	767 770	718 174	751 064	782 364
Depreciation	3 069	3 238	1 091	-	-	-	-
Total expenses	**382 469**	**1 044 463**	**936 112**	**894 656**	**836 863**	**875 190**	**911 661**
Staff complement	94						

1.4. PROGRAMME 4: BUSINESS EVENTS

1.4.1. PROGRAMME PURPOSE

The Business Events Programme houses the SANCB and includes the following business units:

Business Unit	Purpose
Business Development and Support Services	To generate qualified leads and inform targeted positioning of South Africa as a business events destination.
Meetings, Incentives, Conferences and Trade Exhibitions (MICE) Sales	To capacitate and enable a relevant and competitive business events destination through bidding.
Strategic Events and Platforms	To create an inclusive market access and transaction platform for South African and African tourism and auxiliary products.

In contributing towards the South African Tourism impact of: *"tourism in South Africa grows and increasingly contributes to GDP, job creation, inclusive economic participation, and is enjoyed by all South Africans",* the Business Events Programme delivers against the following outcomes and five-year targets in the approved Five-Year Strategic Plan 2020-2025:

Institutional Outcome	Sub-Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)
1. Increase the tourism sector's contribution to inclusive economic growth	Demand creation	Number of international business events hosted	230	111 (cumulative 2020/21-2024/25)
		Number of SMME businesses supported	182	1 096 (cumulative 2020/21-2024/25) *(Through both business events platforms and Visitor Experience events and hosting itineraries)*

The FY2024/25 performance plan of Programme 4 is reflected in the log frame tables below:

1.4.2. PROGRAMME 4: OUTCOMES, OUTPUTS, OUTPUT INDICATORS, AND TARGETS

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
1. Increase the tourism sector's contribution to inclusive economic growth	Demand creation	1.16. B2B Brand Campaign	1.16.1. Number of B2B brand campaigns implemented	N/A	1 Domestic B2B Campaign implemented	1 Domestic B2B Campaign implemented	1 Domestic B2B Campaign implemented	1 Domestic B2B Campaign implemented	1 Domestic B2B Campaign implemented	1 Domestic B2B Campaign implemented
					1 Global B2B Campaign implemented	1 Global B2B Campaign implemented	1 Global B2B Campaign implemented	1 Global B2B Campaign implemented	1 Global B2B Campaign implemented	1 Global B2B Campaign implemented
		1.17. Business events bidding platform	1.17.1. Number of bid submissions	55 bid submissions	81 bid submissions	95 bid submissions	93 bid submissions	93 bid submissions	94 bid submissions	95 bid submissions
			1.17.2. Number of business events hosted in VTSDs	N/A	3 business events piloted in VTSDs	5 business events hosted in VTSDs	5 business events hosted in VTSDs	5 business events hosted in VTSDs	6 business events hosted in VTSDs	7 business events hosted in VTSDs
			1.17.3. Number of Business Events Bidding Impact Reports	N/A	N/A	N/A	4 Business Events Bidding Impact Reports	2 Business Events Bidding Impact Reports	2 Business Events Bidding Impact Reports	2 Business Events Bidding Impact Reports
		1.18. Strategic platforms	1.18.1. Africa's Travel Indaba hosted	N/A	Hosting of Meetings Africa 2022 (No Africa's Travel Indaba in 2021)	Hosting of Africa's Travel Indaba 2022 and Meetings Africa 2023	Hosting of Africa's Travel Indaba 2023 Reimagined	Hosting of Africa's Travel Indaba 2024	Hosting of Africa's Travel Indaba 2025	Hosting of Africa's Travel Indaba 2026
			1.18.2. Meetings Africa hosted	N/A			Hosting of Meetings Africa 2024 Reimagined	Hosting of Meetings Africa 2025	Hosting of Meetings Africa 2026	Hosting of Meetings Africa 2027
			1.18.3 Number of international	N/A	N/A	N/A	6 international strategic platforms participated in	6 international strategic	6 international strategic	6 international strategic

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2020/21	**2021/22**	**2022/23**	**2023/24**	**2024/25**	**2025/26**	**2026/27**
			strategic platforms participated in					platforms participated in	platforms participated in	platforms participated in

1.4.3. PROGRAMME 4: OUTPUT INDICATORS: ANNUAL AND QUARTERLY TARGETS

OUTPUT	OUTPUT INDICATORS	2024/25 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 **Apr - Jun 2024**	**Q2** **Jul - Sep 2024**	**Q3** **Oct - Dec 2024**	**Q4** **Jan - Mar 2025**
1.16. B2B Brand Campaign	1.16.1. Number of B2B brand campaigns implemented	1 Domestic B2B Campaign implemented	Domestic B2B Campaign rollout planning	Implement Quarter 2 milestones in the rollout plan of the Domestic B2B Campaign	Implement Quarter 3 milestones in the rollout plan of the Domestic B2B Campaign	Implement Quarter 4 milestones in the rollout plan of the Domestic B2B Campaign
		1 Global B2B Campaign implemented	Global B2B Campaign rollout planning	Implement Quarter 2 milestones in the rollout plan of the Global B2B Campaign	Implement Quarter 3 milestones in the rollout plan of the Global B2B Campaign	Implement Quarter 4 milestones in the rollout plan of the Global B2B Campaign
1.17. Business events bidding platform	1.17.1. Number of bid submissions	93 bid submissions	33 bid submissions	30 bid submissions	15 bid submissions	15 bid submissions
	1.17.2. Number of business events hosted in VTSDs	5 business events hosted in VTSDs	1 business event hosted in VTSD	2 business events hosted in VTSDs	1 business event hosted in VTSDs	1 business event hosted in VTSDs
	1.17.3. Number of Business Events Bidding Impact Reports	2 Business Events Bidding Impact Reports	-	1 consolidated bi-annual Business Events Bidding Impact Report	-	1 consolidated bi-annual Business Events Bidding Impact Report
1.18. Strategic platforms	1.18.1. Africa's Travel Indaba hosted	Hosting of Africa's Travel Indaba 2024	Hosting of Africa's Travel Indaba 2024	Post-Show Economic Impact Study briefing	Planning for Africa's Travel Indaba 2025	Planning for Africa's Travel Indaba 2025

OUTPUT	OUTPUT INDICATORS	2024/25 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2024	Q2 Jul - Sep 2024	Q3 Oct - Dec 2024	Q4 Jan - Mar 2025
	1.18.2. Meetings Africa hosted	Hosting of Meetings Africa 2025	Post-Show Economic Impact Study briefing	Planning for Meetings Africa 2025	Planning for Meetings Africa 2025	Hosting of Meetings Africa 2025
	1.18.3 Number of international strategic platforms participated in	6 international strategic platforms participated in	Plan for and participate at 2 international strategic platforms: ATM and IMEX Frankfurt	Plan for IMEX America, IBTM and WTM	Participate at 3 international strategic platforms: IMEX America, IBTM and WTM	Plan for and participate at 1 international strategic platform: ITB Berlin

1.4.4. PROGRAMME 4: EXPLANATION OF PLANNED PERFORMANCE OVER THE MEDIUM-TERM PERIOD

The SANCB is mandated to market South Africa as a premier business events destination and to secure international and regional meetings, incentives, conventions, and exhibitions. Thus, the SANCB actively seeks to develop leads for future business events so that South Africa can continuously enhance its bidding pipeline.

South Africa continues to be the leading business events destination in the region, and this compels the SANCB to retain the destination's competitive advantage in the global business events sector. This is ensured through numerous campaigns, deployed to ensure consistent marketing and promotion efforts across the globe. The purpose of the B2B global and domestic brand campaigns are to contribute to effective marketing of the destination and to contribute to positioning South Africa as a business events destination to attract these into the country.

As part of reigniting demand, a domestic business events campaign will be implemented to support business events to take place in VTSDs as part of ensuring inclusive, as well as sustainable, recovery. Additionally, a global business events campaign will be implemented as part of positioning South Africa's hosting capabilities.

Bid submissions form a critical part in pursuing potential conversion to increase the number of business events hosted in South Africa. Strategic platforms play an enabling role in facilitating potential business opportunities for the destination.

To continue making informed decisions that will benefit the business events sector and continue positioning SANCB as a thought leader, the programme seeks to undertake the following research:

1) SANCB Strategy: The current SANCB strategy was developed at inception in FY2011/2012. There is a need to develop a new strategy that will address growth for the destination in the business events sector.

2) Review of strategic platforms: A study will be conducted to ascertain the viability of the current strategic platforms and to identify other platforms post-COVID-19.

3) Competitor insights: To source insights to assist the South African business events industry when bidding against some of our key competitors in the market.

4) Macro-economic impact: Currently, the SANCB only measures the micro-economic impact of business events, yet the macro-economic impact is just as important in demonstrating the contribution of business events to the economy.

1.4.5.   PROGRAMME 4: RESOURCE CONSIDERATIONS

Programme 4: Business Events (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
Economic classification:							
Compensation of employees	12 833	13 347	17 619	18 338	17 153	17 939	18 686
Goods and Services	18 003	74 912	307 514	195 399	182 777	191 147	199 113
Total expenses	**30 836**	**88 259**	**325 133**	**213 737**	**199 930**	**209 086**	**217 799**
Staff complement	14						

1.5. PROGRAMME 5: TOURIST EXPERIENCE

1.5.1. PROGRAMME PURPOSE

The Tourist Experience Programme includes the following business units:

Business Unit	Purpose
Quality Assurance and Development	▪ To grow the number of graded properties across South Africa, which will improve overall perceptions of South Africa as a quality destination that offers a diverse, unique, and enriched variety of products and price points for tourists.
Visitor Experience	▪ To enable travel trade and associated partners to deliver world-class, warm, friendly, and efficient services to tourists from the ports of entry to the various tourism value touch points; and ▪ To recognise and celebrate tourism businesses for tourism excellence, for their contribution to South Africa's global competitiveness, and for growing tourism's contribution towards GDP and job creation.
Brand Experience	▪ To seek new offerings, products, and operators to package in exciting itineraries for the use of South African Tourism hosting needs; and ▪ To enable inclusive growth through itineraries that incorporate emerging / transformed businesses, encourage geographic spread across the country, and address the misperceptions associated with seasonal travel.
Global Trade	▪ To foster proactive and collaborative engagements between the organisation and stakeholders in the aviation and cruise industries (followed by road and rail) nationally, regionally, and internationally to promote South Africa as a lucrative destination; and ▪ To identify and implement trade tools required for partners to better sell South Africa and improve conversion.

In contributing towards the South African Tourism impact of: "tourism in South Africa grows and increasingly contributes to GDP, job creation, inclusive economic participation, and is enjoyed by all South Africans", the Tourist Experience Programme delivers against the following outcome and five-year targets in the approved Five-Year Strategic Plan 2020 - 2025:

Institutional Outcome	Sub-Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)
1. Increase the tourism sector's contribution to inclusive economic growth	Demand fulfilment	Seasonality of tourist arrivals	1.3%	1.3%
		Geographic spread of international tourist arrivals	20.0%	13.9%
		Geographic spread of domestic tourist arrivals	8.0%	8.0%
		Net Promoter Score	91.0%	-
		Number of SMME businesses supported	182	1 096 (cumulative 2020/21-2024/25) *(Through both business events platforms and Visitor Experience events and hosting itineraries)*

The FY2024/25 performance plan of Programme 5 is reflected in the log frame tables below:

1.5.2. PROGRAMME 5: OUTCOMES, OUTPUTS, OUTPUT INDICATORS, AND TARGETS

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
1. Increase the tourism sector's contribution to inclusive economic growth	Demand fulfilment	1.19. Quality assured visitor services	1.19.1. Number of graded establishments	-	3 605	4 959	5 462	5 000	5 200	5 500
		1.20. Quality assurance in tourism value chain	1.20.1. Three-Year Tourism Value Chain and Barrier Strategy implemented	N/A	N/A	N/A	Three-Year Tourism Value Chain Strategy developed Three-Year Tourism Value Chain Strategy Roadmap developed	Implementation of Three-Year Tourism Value Chain Strategy FY2024/25 Roadmap	Implementation of Three-Year Tourism Value Chain Strategy FY2025/26 Roadmap	Implementation of Three-Year Tourism Value Chain Strategy FY2026/27 Roadmap
		1.21. Global Trade Programme	1.21.1. Global Trade Programme implemented	N/A	N/A	N/A	FY2023/24 Global Trade Plan implemented	FY2024/25 Global Trade Plan implemented	FY2025/26 Global Trade Plan implemented	FY2026/27 Global Trade Plan implemented

1.5.3. PROGRAMME 5: OUTPUT INDICATORS: ANNUAL AND QUARTERLY TARGETS

OUTPUT	OUTPUT INDICATORS	2024/25 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2024	Q2 Jul - Sep 2024	Q3 Oct - Dec 2024	Q4 Jan - Mar 2025
1.19. Quality assured visitor services	1.19.1. Number of graded establishments	5 000 graded establishments	1 500	3 000	4 000	5 000
1.20. Quality assurance in tourism value chain	1.20.1. Three-Year Tourism Value Chain and Barrier Strategy implemented	Implementation of Three-Year Tourism Value Chain Strategy FY2024/25 Roadmap	Finalise the Three-Year Tourism Value Chain Strategy FY2024/25 Roadmap	Implement Quarter 2 milestones in the Three-Year Tourism Value Chain Strategy FY2024/25 Roadmap	Implement Quarter 3 milestones in the Three-Year Tourism Value Chain Strategy FY2024/25 Roadmap	Implement Quarter 4 milestones in the Three-Year Tourism Value Chain Strategy FY2024/25 Roadmap
1.21. Global Trade Programme	1.21.1. Global Trade Programme implemented	FY2024/25 Global Trade Plan implemented	Finalise the FY2024/25 Global Trade Plan	Implement Quarter 2 milestones in the FY2024/25 Global Trade Plan	Implement Quarter 3 milestones in the FY2024/25 Global Trade Plan	Implement Quarter 4 milestones in the FY2024/25 Global Trade Plan

1.5.4 PROGRAMME 5: EXPLANATION OF PLANNED PERFORMANCE OVER THE MEDIUM-TERM PERIOD

Within South African Tourism, tourist experience is addressed through Quality Assurance, Visitor Experience, and Brand Experience (Hosting). These focus areas collectively and individually improve the visitor experience for both international and domestic tourists. The Quality Assurance Function will continue its drive to grow the number of graded properties across South Africa, which will improve the overall perceptions as a quality destination that offers a wide variety of products and price points for tourists.

Travel is about inclusive growth, not only for those that are in the tourism sector, but any South African that has experiences and knowledge to share that contributes positively to the consumer travel experience. For FY2024/25, a specific focus will be to finalise and implement the findings of the review of the grading system, including emerging product and accommodation SMMEs. Visitor Experience will focus on enabling travel trade and associated partners to deliver world-class, friendly, and efficient services to tourists. The Welcome Programme will be enhanced to assist with targeted training of the travel trade and associated partners and to encourage profound immersive experiences through tour guides. Greater emphasis will be placed on working with the private sector on the tourism value chain and barrier initiatives that will contribute towards achieving targets set for South Africa.

Brand Experience will aid both international and domestic media and trade in promoting and selling the South African experience, attractions, and accommodation. It is for this reason that the Brand Experience component will continue to scour the country for new offerings, products, and operators to package in exciting itineraries for the use of South African Tourism hosting needs. To ensure that South African Tourism is true to our inclusive growth endeavours, itineraries will incorporate emerging business, transformation representation, encourage geographic spread across the country, and address the misperceptions associated with seasonal travel. The South African Specialist Programme will be enhanced to ensure content is refreshed and the system functionality is enhanced for optimal user engagement and benefit.

Through the Global Trade component, South African Tourism will continue to collaborate with government and the National Air Access Committee to cement the airlift role and strengthen relationships with key stakeholders like ACSA, provincial Air Access teams and African airline operators. Global Trade will participate in various local and intentional platforms to connect and promote South Africa as a lucrative destination to international airlines and mitigate visa and air travel issues. In addition, South African Tourism will continue to participate in the provincial air access forums to ensure that insights into inbound global markets are made available to support efforts to secure new entrants.

1.5.5 PROGRAMME 5: RESOURCE CONSIDERATIONS

Programme 5: Tourist Experience	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
(R'000)	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
Economic classification:							
Compensation of employees	17 209	18 069	17 477	19 500	18 240	19 076	19 871
Goods and services	17 278	31 078	57 155	72 948	68 236	71 361	74 335
Total expenses	**34 487**	**49 147**	**74 633**	**92 448**	**86 476**	**90 436**	**94 205**
Staff complement	22						

2. CONSOLIDATED FINANCIAL PLAN AND 2024/25 MTEF BUDGET ESTIMATES

2.1. PROJECTED REVENUE FOR 2024/25 MTEF

Revenue	2019/20	2020/21	2021/22	2022/23	2023/24			2024/25	2025/26	2026/27
(R'000)	Audited	Audited	Audited	Audited	Approved	Special Adjustments	Revised Budget	Estimate	Estimate	Estimate
DT allocation	1 256 523	423 027	1 297 038	1 329 206	1 344 672	-33 000	1 311 672	1 243 555	1 300 207	1 359 666
TOMSA levies	133 304	7 942	58 839	115 440	53 972	-	53 972	56 395	59 102	56 455
Indaba Meetings Africa and other exhibitions	110 189	68	16 841	97 467	34 372	-	34 372	35 927	37 652	39 460
Grading fees	23 164	18 942	15 034	25 056	13 210	-	13 210	13 804	14 467	14 467
Sundry revenue	22 498	7 704	4 788	17 606	28 608	-	28 608	29 881	31 315	32 818
TOTAL	**1 545 678**	**457 683**	**1 392 540**	**1 584 775**	**1 474 834**	**-33 000**	**1 441 834**	**1 379 562**	**1 442 743**	**1 502 866**

2.2. PROJECTED EXPENDITURE FOR 2024/25 MTEF

	Name of the Programme	2019/20 Audited (R'000)	2020/21 Audited (R'000)	2021/22 Audited (R'000)	2022/23 Audited (R'000)	2023/24 Approved Budget (R'000)	2023/24 Special Adjustments (R'000)	2023/24 Revised Budget (R'000)	2024/25 Budget (R'000)	2025/26 Budget (R'000)	2026/27 Budget (R'000)
1	Corporate Support	15 219	62 195	154 768	212 278	204 025	-	204 025	190 845	199 586	207 903
2	Business Enablement	79 059	39 841	80 985	70 543	69 968	-	69 968	65 448	68 446	71 298
3	Leisure Tourism Marketing	948 603	454 666	900 735	936 112	894 656	-33 000	861 656	836 863	875 190	911 661
4	Business Events	178 855	30 836	88 259	301 861	213 737	-	213 737	199 930	209 086	217 799
5	Tourist Experience	77 021	34 487	49 147	74 633	92 448	-	92 448	86 476	90 436	94 205
Total		**1 298 757**	**622 025**	**1 273 894**	**1 595 426**	**1 474 834**	**-33 000**	**1 441 834**	**1 379 562**	**1 442 743**	**1 502 867**

3. UPDATED KEY RISKS AND MITIGATION ACTIONS FROM THE STRATEGIC PLAN

The strategic risks reflected in the Five-Year Strategic Plan 2020-2025 are updated as follows:

Outcome	Key Risk	Risk Mitigation
1. Increase the tourism sector's contribution to inclusive economic growth	Inability of tourists to access the country.	▪ Collaborate with partner departments to facilitate entry requirements and processes for incoming tourists. This includes increasing capacity in visa processing and providing clarity on entry requirements to streamline the arrival experience for tourists. ▪ Engagements at National Tourism Stakeholder Forum (NTSF) platforms to discuss and address challenges related to tourist access. ▪ Strengthen partnerships with trade stakeholders, such as airlines and travel agencies, to enhance connectivity and accessibility through strategic collaborations to increase flight routes, improve air access, and promote tourism packages. ▪ Implementation of controls and measures to ensure a smooth and secure entry process for tourists. This includes implementing necessary security protocols and procedures while maintaining a welcoming and efficient experience. ▪ Engage with stakeholders to reposition South Africa as a destination of choice through global marketing efforts, through strategic communication and marketing campaigns to highlight the country's attractions, safety measures, and unique experiences. • Develop and implement an air access strategy to improve connectivity and increase the number of flights to key destinations. This strategy focuses on attracting airlines and expanding routes to enhance accessibility for tourists.
	Safety and security of tourists in South Africa.	▪ Establishing collaborative working arrangements with the security cluster to enhance safety measures for tourists and residents. This includes conducting intensive awareness campaigns on safety. ▪ Implementing a global advocacy programme to manage the perception around crime in the country, promoting South Africa as a safe destination for tourists. ▪ Implementing health and safety standards to ensure the well-being of tourists. This includes measures to address potential risks and hazards. ▪ Establishing partnerships with other relevant agencies, such as law enforcement and emergency services, to collaborate on safety and security initiatives. • Establishing Crisis communication Joint Operations Centers (JOCs) as strategic platforms to effectively

Outcome	Key Risk	Risk Mitigation
		manage and respond to safety and security incidents, ensuring timely and coordinated communication.
	Inadequacy of national infrastructure capacity and quality readiness.	▪ Collaborating with the Department of Tourism to better utilise and make available data for infrastructure planning and development. ▪ Aligning infrastructure plans with specific target markets to attract tourists and support infrastructure development. ▪ Implementing programme to reimagine and enhance global trade partnerships and opportunities. ▪ Engaging and collaborating with other departments to address infrastructure challenges and enhance readiness. • Business Continuity backup such as generators, to ensure business continuity in case of infrastructure disruptions.
2. Achieve good corporate and cooperative governance	Ease of accessibility of South African Tourism insights and other relevant information.	▪ Digitalisation of information sources, implementing a centralised data storage system to store and manage market expectations and needs data, making it easily accessible. ▪ Developing user-friendly dashboards for users to access and analyse insights. Subscribing to real-time data services from providers. SAT is also building its own central data storage platform. ▪ Generating reports that present insights in a clear and understandable format, making it easier for users to interpret and utilise the information. ▪ Engaging with the Provincial Tourism Authorities (PTA) in the distribution of insights, ensuring that relevant stakeholders have access to the information. ▪ Facilitating structured engagements and discussions at the CEO and CMO level to ensure that the insights are effectively communicated and utilised for decision-making.
	Cybersecurity risks - data protection and ICT security.	▪ Quarterly penetration testing to identify vulnerabilities and daily vulnerability scanning. ▪ Monitoring the progress of implementing the cybersecurity framework initiatives and regularly assessing vulnerabilities in the cybersecurity infrastructure. This includes identifying and addressing potential risks associated with phishing, malware, and ransomware attacks.
	Findings due to a weak internal control environment.	▪ Addressing audit findings, promoting accountability, reviewing policies and procedures, implementing preventative controls, providing training, and enhancing the capabilities of relevant committees and staff members. Implement training and awareness campaigns on anti-fraud and corruption.
	Budget erosion.	▪ Implement measures to amplify revenue generation initiatives within the tourism sector. This can include exploring new sources of funding, partnerships with

Outcome	Key Risk	Risk Mitigation
		private sector entities, and innovative revenue-generating projects. ▪ Heighten cost efficiency measures at the functional level to optimise budget utilisation, such as conducting thorough cost assessments, identifying areas for cost savings, and implementing strategies to reduce unnecessary expenses. ▪ Prioritise expenditure on critical tourism initiatives and activities that have the highest potential for economic impact by carefully evaluating and allocating funds to projects that align with strategic objectives and have a significant return on investment. ▪ Value for money in marketing expenditure by conducting thorough evaluations of marketing campaigns and initiatives and assessing the effectiveness and efficiency of marketing channels, targeting the right audience, and optimising marketing strategies to maximise impact. ▪ Advocate for increased funding for the tourism sector by engaging with relevant stakeholders, such as government officials, policymakers, and industry associations by highlighting the importance of tourism for economic growth and job creation and emphasise the need for adequate funding to support tourism initiatives. ▪ Foster collaboration and partnerships with other organisations, both within the tourism sector and beyond, to leverage resources and share costs. This can include joint marketing campaigns, shared infrastructure, and collaborative projects that reduce individual financial burdens. ▪ Implement robust monitoring and evaluation mechanisms to track the impact and effectiveness of budget utilisation. Regularly assess the outcomes of tourism initiatives and adjust strategies as needed to ensure optimal use of resources.
	Talent Management	▪ Engagement on informal and formal programmes available for learning, development, and coaching. ▪ Recruitment of vacant critical positions. ▪ Performance management programme. ▪ Talent management framework. ▪ Review remuneration and recognition policy and conduct global benchmark. ▪ Implementation of engagement survey action plans to enhance engagement levels.
	Poor corporate and destination brand perception	▪ Conducting a comprehensive review of the brand to ensure a unified messaging strategy and the implementation of a global campaign to enhance the brand perception. ▪ Addressing the brand culture of the organisation. It includes initiatives such as employee awareness and

Outcome	Key Risk	Risk Mitigation
		training programs to educate employees on the importance of protecting confidential information, recognising and addressing misinformation, and understanding the potential impact of negative media coverage. ▪ Public Relations Policy to establish effective communication channels to disseminate accurate and timely information to stakeholders. It includes strategies to address public perception and manage media relations effectively.
	Inadequate innovation within the business	▪ Leadership to actively support and participate in innovation initiative to set the tone by demonstrating commitment to innovation, providing resources and support, and actively engaging with employees to encourage and nurture innovative ideas.
	Stakeholder Management	▪ Address the challenges related to tourist access by collaborating with partner departments, engaging stakeholders, strengthening trade partnerships, implementing controls, and strategically positioning South Africa as an attractive destination.

The detailed South African Tourism Risk Register is reviewed monthly by ExCo, and quarterly at the Audit and Risk Committee meeting.

4. PUBLIC ENTITIES

South African Tourism does not have any public entities.

5. INFRASTRUCTURE PROJECTS

Not applicable to South African Tourism.

6. PUBLIC/PRIVATE PARTNERSHIPS

Not applicable to South African Tourism at this stage.

PART D: TECHNICAL INDICATOR DESCRIPTIONS

Note: Where the South African Tourism's Delegation of Authority (DoA) is silent on any deliverable (for example, report, plan, framework, or roadmap, etc.) for consideration and/or review and/or approval, the consideration and/or review and/or approval lies with the Executive Committee (ExCo) of South African Tourism.

1. PROGRAMME 1: CORPORATE SUPPORT

Indicator Title 2.1.1	Improved risk maturity level
Definition	The Risk Maturity Model is an assessment tool focused on the organisation's risk culture and the development of the organisation's Risk Management Programme. It evaluates the extent to which risk management is embedded within the organisation, where a high maturity level translates into effective risk management. Year on year South African Tourism plans to improve the organisation's risk maturity level from the level determined in the prior assessment.
Source of Data	▪ FY2023/24 Risk Management Maturity Assessment Report.
Method of Calculation / Assessment	▪ Assess progress on the implementation of the recommendations from the FY2023/24 risk management maturity assessment report on a quarterly basis, towards an improved risk maturity level.
Means of Verification	Verify that the: ▪ Quarterly Governance, Risk and Compliance Reports outline progress on the implementation of the recommendations arising from the FY2023/24 Risk Management Maturity Assessment Report, and were approved by the Head: Governance, Risk and Compliance, or the assigned DOA, within five calendar days after the end of each quarter.
Assumptions	The recommendations arising from the FY2023/24 Risk Management Maturity Assessment reports are actionable.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Higher than targeted performance is desirable.

Indicator Responsibility	Divisional Head: Governance, Risk, Compliance.

Indicator Title 2.1.2	**Corporate Compliance Campaign (Operation Clean Audit) implemented**
Definition	South African Tourism will implement a campaign that seeks to improve corporate compliance and work towards a clean audit outcome. These efforts will focus on enhancing the internal control environment in financial health, supply chain management, human capital, striving for greater accuracy in the annual financial statements and performance reporting, and improving the information technology environment.
Source of Data	▪ FY24/25 Corporate Compliance Campaign. ▪ Quarterly OPCA Reports outlining progress against the FY24/25 Corporate Compliance Campaign.
Method of Calculation / Assessment	▪ Assess the progress on the implementation of the annual plan for the Corporate Compliance Campaign.
Means of Verification	Verify that the: ▪ FY24/25 Corporate Compliance Campaign was developed in Quarter 1. ▪ Quarterly OPCA Reports outlining progress against the FY24/25 Corporate Compliance Campaign and was approved by the COO, or the assigned DOA, within five days of the end of each quarter.
Assumptions	Management executes the plans timeously.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operations Officer

Indicator Title 2.1.3	Percentage implementation of valid internal and external audit recommendations
Definition	The implementation of valid audit recommendations that were provided during audits by internal and external auditors as agreed for the reporting period. The validity of findings is determined by whether there are supporting documents.
Source of Data	▪ Quarterly Internal Audit Reports. ▪ Quarterly Audit Tracker detailing progress towards mitigation of findings.
Method of Calculation / Assessment	▪ Calculation: Number of recommendations implemented divided by the total number of recommendations, expressed as a percentage.
Means of Verification	Verify that the: ▪ Quarterly Internal Audit Reports were approved by the Head: Internal Audit, or the assigned DOA, within five days after the end of each quarter. ▪ Quarterly Audit Tracker details progress towards mitigation of findings, and were available within five days after the end of each quarter.
Assumptions	Management executes the internal and external audit recommendations as per the agreed action dates.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Audit Executive.

Indicator Title 2.2.1	Percentage payment of compliant invoices within thirty days from date of receipt
Definition	Percentage of compliant invoices paid within 30 days from date of receipt to suppliers of goods and services, unless otherwise determined in a contract or other agreement, or in the case of civil claims, from the date of settlement or court judgement.
Source of Data	▪ Oracle Financial Management System.

Method of Calculation / Assessment	▪ Calculation: Number of compliant invoices paid within 30 days of receipt divided by the total number of compliant invoices, expressed as a percentage.
Means of Verification	▪ Verify the creditor's payment period as reflected in the quarterly consolidated trial balance.
Assumptions	Payment for goods and services from government institutions and those with different payment terms will be executed.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Non-cumulative.
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Financial Officer.

Indicator Title 2.2.2	**Number of initiatives to promote integrity and ethical conduct in Supply Chain Management (SCM) implemented as per Section 57 of the PFMA**
Definition	The implementation of initiatives that promote integrity and ethical conduct in supply chain management as guided by Section 57 of the PFMA.
Source of Data	▪ Quarterly Finance and SCM Reports outlining the progress made on the planned initiatives.
Method of Calculation / Assessment	▪ Simple count of the number of initiatives to promote integrity and ethical conduct in SCM implemented (PFMA Section 57).
Means of Verification	Verify that the: ▪ Quarterly Finance and SCM Reports outline the progress made on the planned initiatives to promote integrity and ethical conduct in supply chain management and were approved by the Chief Financial Officer, or the assigned DOA, within five days after the end of each quarter.
Assumptions	Resources will be available to implement the six initiatives.
Disaggregation of Beneficiaries (where applicable)	Not applicable.

Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Financial Officer.

Indicator Title 2.3.1	**Budget Optimisation Strategy implemented**
Definition	The Budget Optimisation Strategy outlines the organisation's approach to enhancing revenue generation and cost optimisation to reduce the organisation's reliance on the fiscus.
Source of Data	▪ Budget Optimisation Strategy. ▪ Annual Budget Optimisation Strategy Implementation Plan. ▪ Quarterly Finance and SCM Reports outlining progress made on the Annual Budget Optimisation Strategy Implementation Plan.
Method of Calculation / Assessment	▪ Assess the progress on the implementation of the Annual Budget Optimisation Strategy Implementation Plan on a quarterly basis. ▪ Assess whether the Budget Optimisation Strategy and Policy were reviewed in Quarter 4 based on learnings from implementation.
Means of Verification	Verify that the: ▪ Annual Budget Optimisation Strategy Implementation Plan was developed in Quarter 1. ▪ Quarterly Finance and SCM Reports outline progress made on the Annual Budget Optimisation Strategy Implementation Plan and were approved by the Chief Financial Officer, or the assigned DOA, within five days after the end of each quarter. ▪ The Budget Optimisation Strategy and Policy were reviewed in Quarter 4.
Assumptions	The policy environment allows for significant investments into the public entity.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).

Reporting Cycle	Annual
Desired Performance	Implementation as per the defined target.
Indicator Responsibility	Divisional Head: Chief Financial Officer.

Indicator Title 2.4.1	Staff Engagement Survey Improvement Plan implemented
Definition	A staff engagement survey is a structured questionnaire or assessment tool used by organisations to measure and evaluate the level of employee engagement within the workplace. It consists of a series of questions designed to gather feedback and insights from employees about leadership, team effectiveness, work outputs, business enablement, reward and recognition and wellbeing. The results of engagement surveys are used by South African Tourism to identify areas for improvement and develop strategies to enhance employee engagement, productivity, and retention.
Source of Data	- FY2023/24 Annual Staff Engagement Survey Report. - Staff Engagement Survey Two-Year Improvement Plan based on FY2023/24 Annual Staff Engagement Survey Report. - Quarterly Human Capital Reports outlining progress made on the Two-Year Staff Engagement Survey Improvement Plan.
Method of Calculation / Assessment	Assess the progress against the Two-Year Staff Engagement Survey Improvement Plan on a quarterly basis.
Means of Verification	Verify that the: - Staff Engagement Survey Two-Year Improvement Plan based on FY2023/24 Annual Staff Engagement Survey Report was developed in Quarter 1. - Quarterly Human Capital Reports outline progress made on the Two-Year Staff Engagement Survey Improvement Plan and were approved by the Chief Operations Officer, or the assigned DOA, within five days after the end of each quarter.
Assumptions	Human Capital Strategy is implemented.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.

Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operations Officer.

Indicator Title 2.4.2	Organisational Effectiveness Assessment Improvement Plan implemented
Definition	An organisational effectiveness assessment is a systematic evaluation or analysis conducted within an organisation to determine how efficiently and optimally it operates. It involves assessing various aspects of the organisation, such as its structure, processes, leadership, culture, and performance metrics. The goal of this assessment is to identify strengths, weaknesses, opportunities, and threats that can impact the South African Tourism's overall effectiveness and efficiency. Insights gained from such assessments are used to make informed decisions and implement improvements to enhance the organisation's performance, productivity, and competitiveness.
Source of Data	▪ FY2024/25 Organisational Effectiveness Assessment Report. ▪ Organisational Effectiveness Assessment Three-Year Improvement Plan. ▪ Quarterly Human Capital Reports outlining progress made on the Organisational Effectiveness Assessment Three-Year Improvement Plan.
Method of Calculation / Assessment	▪ Assess quarterly progress against the Organisational Effectiveness Assessment Three-Year Improvement Plan in Quarters 2, 3 and 4.
Means of Verification	Verify that the: ▪ FY2024/25 Organisational Effectiveness Assessment was conducted in Quarter 1. ▪ Organisational Effectiveness Assessment Three-Year Improvement Plan was developed in Quarter 2. ▪ Quarterly Human Capital Reports outline progress made on the Organisational Effectiveness Assessment Three-Year Improvement Plan and were approved by the Chief Operations Officer, or the assigned DOA, within five days after the end of Quarters 2, 3 and 4.
Assumptions	Human Capital Strategy is implemented.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable

Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operations Officer.

Indicator Title 2.5.1	ICT Governance Framework implemented
Definition	The ICT Governance Framework is defined as the processes that ensure the effective and efficient use of ICT in enabling South African Tourism to achieve its goals and objectives. The ICT Governance Framework ensures the effective evaluation, selection, prioritisation, and funding of competing ICT investments; administer their implementation; and extract quantifiable business benefits.
Source of Data	▪ Approved Master System Plan (ICT Strategy). ▪ FY2024/25 Roadmap for ICT Governance Framework. ▪ Quarterly ICT and DigiTech Reports outlining progress made on the Annual Roadmap for ICT Governance Framework.
Method of Calculation / Assessment	▪ Assess the quarterly progress against the FY2024/25 Roadmap for the ICT Governance Framework.
Means of Verification	Verify that the: ▪ Quarterly ICT and DigiTech Reports outline progress made on the FY2024/25 Roadmap for the ICT Governance Framework and were approved by the Chief Operations Officer, or the assigned DOA, within five days after the end of the quarter.
Assumptions	Sufficient budget is made available for the execution of the Implementation Roadmap.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target.
Indicator Responsibility	Divisional Head: Chief Operations Officer.

2. PROGRAMME 2: BUSINESS ENABLEMENT

Indicator Title 2.6.1	Integrated Digital and Analytics Operating Framework Annual Roadmap implemented
Definition	The Integrated Digital and Analytics Operating Framework provides the foundation for South African Tourism to champion the digital outlook for South African Tourism and the tourism industry. For each year of implementation, an annual Roadmap will be developed and implemented.
Source of Data	▪ Year 3 Roadmap of the Integrated Digital and Analytics Operating Framework. ▪ Quarterly DigiTech Reports reflecting progress against the approved Year 3 Roadmap.
Method of Calculation / Assessment	▪ Assess the progress against the Year 3 Roadmap of the Integrated Digital and Analytics Operating Framework on a quarterly basis. ▪ Assess that the Year 4 Roadmap of the Integrated Digital and Analytics Operating Framework was developed in Quarter 4.
Means of Verification	Verify that the: ▪ Quarterly DigiTech Reports reflect progress against the approved Year 3 Roadmap of the Integrated Digital and Analytics Operating Framework and were approved by the Chief Operations Officer, or the assigned DOA, within five days after the end of each quarter. ▪ Year 4 Roadmap of the Integrated Digital and Analytics Operating Framework was developed in Quarter 4.
Assumptions	▪ Support by business units for the implementation of Year 3 Roadmap. ▪ Sufficient budget allocation.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per defined the target is desirable.
Indicator Responsibility	Divisional Head: Chief Operations Officer.

Indicator Title 2.7.1	Number of tourism information tracking surveys completed
Definition	Tourism information tracking surveys provide quality tourism information for planning and organisational decision-making purposes. The five tourism information tracking surveys that will be undertaken by South African Tourism are the: ▪ International leisure brand tracker resulting in three fieldwork reports. ▪ Departure Survey resulting in four fieldwork reports. ▪ Domestic Tourism Survey resulting in four fieldwork reports. ▪ Business Events Brand Equity Tracker resulting in four fieldwork reports. ▪ Domestic Leisure Brand Tracker resulting in four fieldwork reports.
Source of Data	▪ International leisure brand tracker: three fieldwork reports. ▪ Departure Survey: four fieldwork reports. ▪ Domestic Tourism Survey: four fieldwork reports. ▪ Business Events Brand Equity Tracker: four fieldwork reports. ▪ Domestic Leisure Brand Tracker: four fieldwork reports.
Method of Calculation / Assessment	▪ Simple count of the number of quarterly tourism information tracking fieldwork reports completed.
Means of Verification	Verify performance as follows: ▪ International Leisure Brand Tracker: 1 fieldwork report delivered in Quarters 2, 3, and 4, within five days after the end of the relevant quarter. ▪ Departure Survey: 1 fieldwork report delivered in each quarter, within five days after the end of the quarter. ▪ Domestic Tourism Survey: 1 fieldwork report delivered in each quarter, within five days after the end of the quarter. ▪ Business Events Brand Equity Survey: 1 fieldwork report delivered in each quarter within five days after the end of the relevant quarter. ▪ Domestic Leisure Brand Tracker: 1 fieldwork report delivered in each quarter, within five days after the end of the relevant quarter.
Assumptions	No lockdowns or other impediments to data collection.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly

Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Strategy Officer.

Indicator Title 2.8.1	Number of trend analysis reports
Definition	The quarterly trends analysis report must include key trends which relate to tourism or consumer trends. These report are produced in either PowerPoint, Word, or PDF format.
Source of Data	▪ Quarterly Trend Analysis Reports produced and published.
Method of Calculation / Assessment	▪ Simple count of the number of trend analysis reports produced and published per quarter.
Means of Verification	Verify that the: ▪ Quarterly Trend Analysis Reports were produced and published.
Assumptions	Not applicable.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Strategy Officer.

Indicator Title 2.9.1	Number of thought leadership pieces published
Definition	Thought leadership pieces, focusing on tourism, will be published on internal and/or external platforms in any one of the following formats: a published article; a PowerPoint presentation; an infographic; a news story; a video; an animation.
Source of Data	▪ Published thought leadership pieces focusing on tourism.
Method of Calculation / Assessment	▪ Simple count of the number of thought leadership pieces published.
Means of Verification	Verify that the:

	▪ Thought leadership pieces were produced and published.
Assumptions	Not applicable.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Strategy Officer.

Indicator Title 2.10.1	Number of tourism statistics and performance reports
Definition	Tourism Statistics and Performance Reports outline the state of tourism in South Africa and globally and will be produced on a quarterly basis.
Source of Data	▪ Tourism Statistics and Performance Reports.
Method of Calculation / Assessment	▪ Simple count of the number of Tourism Statistics and Performance Reports produced.
Means of Verification	Verify that the: ▪ Tourism Statistics and Performance Reports were produced and published on a quarterly basis.
Assumptions	No delays in fieldwork.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Strategy Officer.

Indicator Title 2.11.1	South African Tourism Corporate Brand Index
Definition	The Corporate Brand Index assesses the level of awareness by stakeholders on South African Tourism's mandate and strategy. The survey also measures the levels of satisfaction with stakeholder engagement initiatives and determines the most pertinent communication channels to enhance coordination and collaboration.
Source of Data	▪ FY2023/24 South African Tourism Corporate Brand Index Survey Report. ▪ Reviewed Stakeholder Engagement Framework. ▪ Stakeholder Engagement Framework Implementation Plan. ▪ Quarterly reports reflecting progress against the Stakeholder Engagement Framework Implementation Plan, in Quarters 2, 3 and 4. ▪ FY2024/25 South African Tourism Corporate Brand Index Survey Report.
Method of Calculation / Assessment	▪ Assess progress against the Stakeholder Engagement Framework Implementation Plan, in Quarters 2, 3 and 4. ▪ Assess if the FY2024/25 South African Tourism Corporate Brand Index Survey was undertaken in Quarter 4.
Means of Verification	Verify that the: ▪ Stakeholder Engagement Framework was reviewed in Quarter 1. ▪ Stakeholder Engagement Framework Implementation Plan was developed in Quarter 2. ▪ Quarterly reports reflecting progress against the Stakeholder Engagement Framework Implementation Plan, in Quarters 2, 3 and 4 which were approved by the CEO, or the assigned DOA, within five days after the end of Quarters 2, 3 and 4. ▪ FY2024/25 South African Tourism Corporate Brand Index Survey Report was undertaken in Quarter 4.
Assumptions	▪ Stakeholders will be willing to participate in the survey to determine South African Tourism's Corporate Brand Index. ▪ Adequate resources are available to implement the Stakeholder Engagement Framework Implementation Plan.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.

Desired Performance	Higher than targeted performance is desirable.
Indicator Responsibility	Divisional Head: Chief Executive Officer.

3. PROGRAMME 3: LEISURE TOURISM MARKETING

Indicator Title 1.1.1	Integrated Tourism Brand Strategy developed
Definition	A strong and positive brand can help attract more tourists and boost the country's economy. This involves understanding how South Africa is perceived by potential tourists, both domestically and internationally and how the brand can stay relevant and competitive in the ever-evolving tourism industry. Integration and alignment of the various players and stakeholders to the tourism brand is critical, and this requires an Integrated Tourism Brand Strategy to inform the global brand campaign brief and toolkits that can be adopted by stakeholders.
Source of Data	▪ Brand review that was concluded in Quarter 1. ▪ Integrated Tourism Brand Strategy for FY25/26 that was developed in Quarter 2. ▪ Integrated Tourism Brand Strategy for FY25/26 that was approved in Quarter 3. ▪ Integrated Tourism Brand Plans for FY25/26 that were developed in Quarter 4. ▪ Quarterly Brand and Marketing Reports detailing progress on the above listed targets, as applicable per quarter.
Method of Calculation / Assessment	▪ Assess progress towards the development of the Integrated Tourism Brand Strategy.
Means of Verification	Verify that the: ▪ Brand review was concluded in Quarter 1. ▪ Integrated Brand Strategy for FY25/26 was developed in Quarter 2. ▪ Integrated Brand Strategy for FY25/26 was approved in Quarter 3, in line with South African Tourism's Delegation of Authority. ▪ Integrated Tourism Brand Plans for FY25/26 were developed in Quarter 4. ▪ Quarterly Brand and Marketing Reports detail progress on the above listed targets, as applicable per quarter, and were approved by the Chief Marketing Officer, or the assigned DOA, within five days of the end of each quarter.
Assumptions	▪ Brand review is initiated in FY23/24 Quarter 4. ▪ There is sufficient budget available.

	▪ Working and acceptable tools implemented for performance tracking, e.g. brand management system, data management, media monitoring, and digital asset management. ▪ No restrictions or business interruption from unforeseen events. ▪ All approvals are received timeously per as per South African Tourism's Delegation of Authority.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Marketing Officer.

Indicator Title 1.1.2	**Global Tourism Brand Campaign implemented**
Definition	An annual Global Tourism Brand Campaign specifically targeting the MPIF defined global markets is developed and implemented.
Source of Data	▪ FY24/25 Global Tourism Brand Campaign Plan that was developed in Quarter 1. ▪ Quarterly Brand and Marketing Reports detailing progress against the Global Tourism Brand Campaign Plan.
Method of Calculation / Assessment	▪ Assess progress towards implementation of the FY2024/25 Global Tourism Brand Campaign Plan on a quarterly basis.
Means of Verification	Verify that the: ▪ FY2024/25 Global Tourism Brand Campaign Plan was developed and approved in line with South African Tourism's Delegation of Authority ▪ Quarterly Brand and Marketing Reports detail progress against the FY2024/25 Global Tourism Brand Campaign Plan and were approved by the Chief Marketing Officer, or the assigned DOA, within five days of the end of each quarter.
Assumptions	▪ There is sufficient budget available. ▪ Working and acceptable tools implemented for performance tracking, e.g., brand management system, data management, media monitoring, and digital asset management. ▪ No restrictions or business interruption from unforeseen events.

	▪ All approvals are received timeously per as per South African Tourism's Delegation of Authority.
Disaggregation of Beneficiaries (where applicable)	The Global Brand Campaign seeks to promote increased tourist arrivals to South Africa. Increased tourist arrivals to South Africa, and their spend, contributes to the economic impact of tourism, including downstream economic benefit and job creation in the tourism sector.
Spatial Transformation (where applicable)	The Global Brand Campaign seeks to promote increased tourist arrivals to South Africa, including a focus on improving the geographic spread of arrivals and spend across the nine provinces of the country.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Marketing Officer.

Indicator Title 1.2.1	**Number of Europe hubs marketing campaigns implemented**
Definition	SA Tourism develops the global tourism marketing campaign for the destination. This campaign is then localised in the identified MPIF markets in Europe including the UK/Ireland Hub, Central Europe Hub, South Europe Hub & North Europe Hub. Before the Europe Hub campaign is rolled out, it must align to address the nuances of the Europe MPIF markets. This is referred to as a localised campaign for Europe Hubs. The localised Europe marketing campaigns will have 360° integrated elements of the marketing mix, which is a comprehensive plan on reaching the target audience from multiple platforms and channels.
Source of Data	▪ Annual Europe Hub Campaign Implementation Plan. ▪ Europe Hub Campaign Quarterly Reports ▪ Europe Hub Close-out Reports.
Method of Calculation / Assessment	▪ Simple count of the number of Europe Hubs marketing campaigns implemented.
Means of Verification	Verify that the: ▪ Annual Europe Hub Campaign Implementation Plan has defined milestones per quarter, with annual campaign concept, and success measurements and is approved in line with the South African Tourism's DOA.

	▪ Europe Hub Campaign Quarterly Reports is aligned to the Campaign Plan and were approved by the Chief Operations Officer, or the assigned DOA, within five days after the end of the quarter. ▪ Europe Hub Close-out Reports were approved by the Chief Operations Officer, or the assigned DOA, within sixty days after the end of the campaign.
Assumptions	▪ Sufficient budget. ▪ Timeous global content that can be effectively localised. ▪ Clear global CI guidelines ▪ Working technology and related systems. ▪ Unrestricted market conditions, e.g., COVID-19-related travel restrictions. ▪ The current DOA remains the same.
Disaggregation of Beneficiaries (where applicable)	The Europe Hub localised market campaigns seek to promote increased destination awareness and tourist arrivals to South Africa from Europe. Increased Europe arrivals to South Africa, and their spend, contributes to the economic impact of tourism, including downstream economic benefit and job creation in the tourism sector.
Spatial Transformation (where applicable)	The Europe Hub localised market campaigns seek to promote increased tourist arrivals to South Africa from Europe. Increased Europe arrivals to South Africa, and their spend, contributes to the economic impact of tourism, including downstream economic benefit and job creation in the tourism sector.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operating Officer.

Indicator Title 1.3.1	Number of distribution channel initiatives implemented in Europe
Definition	Europe Hubs' Distribution channels are a tourism network of traditional and non-traditional organisations, individuals, and direct marketing involved in building destination brand awareness, positivity and/or conversion, i.e., trade, media, influencers, corporates, and stakeholders. Distribution channel initiatives are platforms that allow SAT to engage and communicate with distribution channels to drive our marketing communication.
Source of Data	▪ Europe Hub Annual Distribution Channel Initiatives Implementation Plan.

	▪ Europe Hub Quarterly Implementation Plan Progress Reports, aligned to the Annual Distribution Channel Initiatives Implementation Plan. ▪ Close-out Report.
Method of Calculation / Assessment	▪ Simple count of the number of distribution channel initiatives implemented Europe.
Means of Verification	Verify that the: ▪ Europe Hub Annual Distribution Channel Initiatives Implementation Plan, with clear milestones per quarter, is approved as per the South African Tourism DOA. ▪ A Europe Hub Quarterly Implementation Plan Progress Report is aligned to the Annual Distribution Channel Initiatives Implementation Plan and is submitted five days after the end of each quarter, and is approved by the Chief Operations Officer, or assigned DOA. ▪ Close-out Report was produced in Quarter 4 outlining ROI, learnings, and future recommendations.
Assumptions	▪ Sufficient budget is allocated. ▪ The hosting policy and hosting platform that are market relevant. ▪ Working technology and related systems. ▪ B2B Portal on SA.net – Ability to connect SMMEs and trade and consumers. ▪ A functioning sa.net website – with SME products and experiences. ▪ The current DOA remains the same
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operating Officer.

Indicator Title 1.4.1	**Number of marketing campaigns implemented in Americas hubs**
Definition	South African Tourism develops the global tourism marketing campaign for the destination. This campaign is then localised in the identified MPIF markets in the Americas namely USA and Brazil.

	Before the Americas Hub Campaign is rolled out, it has to be aligned to address the nuances of the North and South Americas MPIF markets, including language (translation relevant for Brazilian Portuguese). This is referred to as a localised campaign relevant for a respective market. The localised marketing campaigns may have 360° integrated elements of the marketing mix (budget dependant), which is a comprehensive plan on reaching the target audience from multiple platforms and channels with a heavy skew on digital for cost efficiency. Different marketing elements may be implemented in each quarter or span through different quarters.
Source of Data	▪ Americas Annual Hub Campaign Implementation Plan. ▪ Quarterly Reports outlining progress against the Americas Hub Campaign Implementation Plan. ▪ Close-out Reports.
Method of Calculation / Assessment	▪ Simple count of the number of marketing campaigns implemented in Americas hubs.
Means of Verification	Verify that the: ▪ Americas Hub Campaign Implementation Plan has defined milestones per quarter and was approved in line with the South African Tourism's DOA. ▪ Quarterly Reports outlining progress against the Americas Hub Campaign Implementation Plan and were approved by the Chief Operating Officer, or assigned DOA, within five days after the end of the quarter. ▪ Americas Hub Close-out Reports were approved in line with the South African Tourism's DOA, within 60 days after the end of the campaign.
Assumptions	▪ Sufficient budget allocated timeously. ▪ Appointment of 360 degree agency for USA and Canada. ▪ Timeous global content that can be effectively localised. ▪ Working technology and related systems. ▪ Unrestricted market conditions, e.g., COVID-19-related travel restrictions and negative travel advisories.
Disaggregation of Beneficiaries (where applicable)	The Americas Hub localised market campaigns seek to promote increased tourist arrivals to South Africa from Americas. Increased Americas arrivals to South Africa and their spend, contributes to the economic impact of tourism, including downstream economic benefit and job creation in the tourism sector.
Spatial Transformation (where applicable)	The Americas Hub localised market campaigns seek to promote increased tourist arrivals to South Africa from Americas. Increased Americas arrivals to South Africa, and their spend, contributes to the economic impact of tourism, including downstream economic benefit and job creation in the tourism sector.
Calculation Type	Cumulative (year-end).

Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operating Officer.

Indicator Title 1.5.1	**Number of distribution channel initiatives implemented in Americas**
Definition	Americas Hub distribution channels are traditional and non-traditional trade, i.e., media, influencers, corporates, stakeholders. Distribution channel initiatives are platforms that allow for engagement and communication with distribution channels to build destination awareness, interest and/or conversion. Activities and platforms can be activated virtually and physically.
Source of Data	▪ Americas Hub Annual Distribution Channel Initiatives Implementation Plan. ▪ Americas Hub Quarterly Implementation Plan Progress Reports.
Method of Calculation / Assessment	▪ Simple count of the number of distribution channel initiatives implemented in-market.
Means of Verification	Verify that the: ▪ Americas Hub Annual Distribution Channel Initiatives Implementation Plan, with clear milestones per quarter, was approved in line with the South African Tourism DOA. ▪ Quarterly Reports outlining progress against the Americas Hub Annual Distribution Channel Initiatives Implementation Plan and were submitted five days after the end of each quarter, approved by the Chief Operations Officer, or the assigned DOA. ▪ Close-out Report was produced in Quarter 4 outlining ROI, learnings, and future recommendations.
Assumptions	▪ Sufficient budget is allocated. ▪ DOA approvals for hosting are timeous, expedient and simple. ▪ The hosting policy and hosting platform are market relevant. ▪ Execution Lead Hosting Policy and hosting implementation. ▪ Working technology and related systems. ▪ B2B Portal on SA.net – Ability to connect SMMEs and trade and consumers. ▪ A functioning sa.net website – with SME products and experiences.
Disaggregation of Beneficiaries (where applicable)	Not applicable.

Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operating Officer.

Indicator Title 1.6.1	Number of localised brand campaigns implemented in support of the Global Tourism Brand Campaign in Embassy Support markets
Definition	South African Tourism develops the global tourism marketing campaign for the destination. This campaign is then implemented into the Embassy Support markets. ▪ Embassy Support markets (Preference Tier 1 markets as per Embassy Support service model, Tier 2,3,4 markets can also be included). Before the Embassy Support campaign is rolled out, it has to be aligned to address the nuances of the Embassy Support markets. The localised Embassy Support marketing campaigns will have 360° integrated elements of the marketing mix, which is a comprehensive plan on reaching the target audience from multiple platforms and channels. Different marketing elements may be implemented in each quarter or span through different quarters.
Source of Data	▪ Embassy Support Campaign Implementation Plan. ▪ Quarterly Reports outlining progress against the Embassy Support Campaign Implementation Plan. ▪ Close-out Reports.
Method of Calculation / Assessment	▪ Simple count of the number of localised brand campaigns implemented to drive demand in Embassy Support markets.
Means of Verification	Verify that the: ▪ Embassy Support Campaign Implementation Plan has defined milestones per quarter and was approved in line with the South African Tourism's DOA. ▪ Quarterly Reports outlining progress against the Embassy Support Campaign Implementation Plan and were approved by the Chief Operating Officer, or the assigned DOA, within five days after the end of the quarter. ▪ Embassy Support Close-out Reports were approved in line with the South African Tourism DOA, within 60 days after the end of the campaign.

Assumptions	▪ Sufficient budget.
	▪ Timeous global content that can be effectively localised.
	▪ Working technology and related systems.
	▪ Unrestricted market conditions, e.g., COVID-19-related travel restrictions.
Disaggregation of Beneficiaries (where applicable)	The Embassy Support Hub localised market campaigns seek to promote increased tourist arrivals to South Africa from Europe.
	Increased Embassy Support arrivals to South Africa, and their spend, contributes to the economic impact of tourism, including downstream economic benefit and job creation in the tourism sector.
Spatial Transformation (where applicable)	The Embassy Support Hub localised market campaigns seek to promote increased tourist arrivals to South Africa from Embassy Support markets.
	Increased Embassy Support arrivals to South Africa, and their spend, contributes to the economic impact of tourism, including downstream economic benefit and job creation in the tourism sector.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operating Officer.

Indicator Title 1.7.1	**Number of distribution channel initiatives implemented in Embassy Support markets**
Definition	Embassy Support distribution channels are traditional and non-traditional trade, i.e., media, influencers, corporates, stakeholders. Distribution channel initiatives are platforms that allow for engagement and communication with distribution channels to build destination awareness, interest and/or conversion.
Source of Data	▪ Embassy Support Annual Distribution Channel Initiatives Implementation Plan.
	▪ Quarterly Reports outlining progress against the Annual Distribution Channel Initiatives Implementation Plan.
Method of Calculation / Assessment	▪ Simple count of the number of distribution channel initiatives implemented in-market.
Means of Verification	Verify that the:
	▪ Embassy Support Annual Distribution Channel Initiatives Implementation Plan, with clear milestones per quarter, was approved in line with the South African Tourism DOA.

	▪ Quarterly Reports outline progress against the Annual Distribution Channel Initiatives Implementation Plan and is submitted five days after the end of each quarter, and is approved by the Chief Operations Officer, or the assigned DOA. ▪ Close-out Report was produced in Quarter 4 outlining ROI, learnings, and future recommendations.
Assumptions	▪ Sufficient budget is allocated. ▪ The hosting policy and hosting platform that are market relevant. ▪ Execution Lead Hosting Policy and hosting implementation. ▪ Working technology and related systems. ▪ B2B Portal on SA.net – Ability to connect SMMEs and trade and consumers. ▪ A functioning sa.net website – with SME products and experiences. ▪ Functioning trade tools.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operating Officer.

Indicator Title 1.8.1	Number of localised brand campaigns implemented in Asia and Australasia
Definition	South African Tourism develops the global tourism marketing campaign for the destination. This campaign is then localised in the identified MPIF markets in Asia and Australasia. Before the Asia and Australasia Hub campaign is rolled out, it has to be aligned to address the nuances of the markets. This is referred to as a localised campaign. The localised marketing campaigns will have 360° integrated elements of the marketing mix, which is a comprehensive plan on reaching the target audience from multiple platforms and channels. Different marketing elements may be implemented in each quarter or span through different quarters.
Source of Data	▪ Asia and Australasia Hub Campaign Implementation Plan.

	▪ Quarterly Reports outlining progress against the Asia and Australasia Hub Campaign Implementation Plan. ▪ Close-out Report.
Method of Calculation / Assessment	▪ Simple count of the number of localised brand campaigns implemented to drive demand in Asia and Australasia MPIF hubs.
Means of Verification	Verify that the: ▪ Asia and Australasia Hub Campaign Implementation Plan has defined milestones per quarter and was approved in line with the South African Tourism's DOA. ▪ Quarterly Reports outline progress against the Asia and Australasia Hub Campaign Implementation Plan and were approved by the Chief Operating Officer, or the assigned DOA, within five days after the end of the quarter. ▪ Asia and Australasia Hub Close-out Report was approved in line with the South African Tourism Delegation of Authority, within 60 days after the end of the campaign.
Assumptions	▪ Sufficient budget. ▪ Timeous global content that can be effectively localised. ▪ Working technology and related systems. ▪ Unrestricted market conditions, e.g., COVID-19-related travel restrictions.
Disaggregation of Beneficiaries (where applicable)	The Asia and Australasia Hub localised market campaigns seek to promote increased tourist arrivals to South Africa from Asia and Australasia. Increased Asia and Australasia arrivals to South Africa, and their spend, contributes to the economic impact of tourism, including downstream economic benefit and job creation in the tourism sector.
Spatial Transformation (where applicable)	The Asia and Australasia Hub localised market campaigns seek to promote increased tourist arrivals to South Africa from Europe. Increased Asia and Australasia arrivals to South Africa, and their spend, contributes to the economic impact of tourism, including downstream economic benefit and job creation in the tourism sector.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operating Officer.

Indicator Title 1.9.1	Number of distribution channel initiatives implemented in Asia and Australasia markets
Definition	Asia and Australasia Hub distribution channels are traditional and non-traditional trade, i.e., media, influencers, corporates, stakeholders. Distribution channel initiatives are platforms that allow for engagement and communication with distribution channels to build destination awareness, interest and/or conversion.
Source of Data	▪ Asia and Australasia Hub Annual Distribution Channel Initiatives Implementation Plan. ▪ Quarterly Reports outlining progress against the Asia and Australasia Hub Annual Distribution Channel Initiatives Implementation Plan. ▪ Close-out Report.
Method of Calculation / Assessment	▪ Simple count of the number of distribution channel initiatives implemented in-market.
Means of Verification	Verify that the: ▪ Asia and Australasia Hub Annual Distribution Channel Initiatives Implementation Plan, with clear milestones per quarter, was approved in line with the South African Tourism DOA. ▪ Quarterly Reports outline progress against the Asia and Australasia Hub Annual Distribution Channel Initiatives Implementation Plan and is submitted five days after the end of each quarter, and is approved by the Chief Operations Officer, or the assigned DOA. ▪ Close-out Report was produced in Quarter 4 outlining ROI, learnings, and future recommendations.
Assumptions	▪ Sufficient budget is allocated. ▪ The hosting policy and hosting platform that are market relevant. ▪ Execution Lead Hosting Policy and hosting implementation. ▪ Working technology and related systems. ▪ B2B Portal on SA.net – Ability to connect SMMEs and trade and consumers. ▪ A functioning sa.net website – with SME products and experiences.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.

Indicator Responsibility	Divisional Head: Chief Operating Officer.

Indicator Title 1.10.1	Number of regional seasonal campaigns implemented
Definition	SA Tourism develops the global tourism marketing campaign for the destination. This campaign is then rolled out in the identified MPIF Africa markets. Before the campaign is rolled out, it must align to address the nuances of the specific markets for better resonance. This is referred to as a localised campaign for a market. The localised marketing campaigns will have 360° integrated elements of the marketing mix, which is a comprehensive plan for reaching the target audience through multiple platforms and channels.
Source of Data	▪ Annual Africa Localised Campaign Implementation Plan. ▪ Quarterly Campaign Reports outlining progress against the Annual Africa Localised Campaign Implementation Plan. ▪ Close-out Reports within sixty days after the end of the campaigns.
Method of Calculation / Assessment	▪ Simple count of the number of regional (Africa) campaigns implemented.
Means of Verification	Verify that the: ▪ Annual Africa Localised Campaign Implementation Plan has defined milestones per quarter, with the annual campaign concept, and success measurements, and is approved in line with the SA Tourism DOA. ▪ Quarterly Reports outline progress against the Annual Africa Localised Campaign Implementation Plan and were approved by the Chief Operations Officer, or the assigned DOA, within five days after the end of the quarter. ▪ Close-out Reports were approved by the Chief Operations Officer, or the assigned DOA, within sixty days after the end of the campaigns.
Assumptions	▪ Sufficient budget. ▪ Timeous global content that can be effectively localised. ▪ Clear global CI guidelines. ▪ Working technology and related systems. ▪ Unrestricted market conditions, e.g., in-market government rules that allow for destination marketing, etc. ▪ The current DOA remains the same.
Disaggregation of Beneficiaries (where applicable)	The Africa source market campaigns seek to promote increased brand awareness and tourist arrivals to South Africa. Increased tourist arrivals to South Africa, and their spend, contributes to the economic impact of tourism, including downstream economic benefit and job creation in the

	tourism sector. Increased brand awareness contributes to sustainable tourism in South Africa.
Spatial Transformation (where applicable)	The Africa source market campaigns seek to promote increased tourist arrivals to South Africa, including a focus on improving the geographic spread of arrivals and spend across the nine provinces of the country.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operating Officer.

Indicator Title 1.11.1	**Number of distribution channel initiatives implemented in Regional (Africa) markets**
Definition	Africa Hubs' Distribution channels are a tourism network of traditional and non-traditional organisations, individuals, and direct marketing involved in building destination brand awareness, positivity and/or conversion, i.e., trade, SAPO, media, influencers, corporates, and stakeholders. Distribution channel initiatives are platforms that allow SAT to engage and communicate with distribution channels to drive different messaging.
Source of Data	▪ Africa Hubs Annual Distribution Channel Initiatives Implementation Plan. ▪ Quarterly Reports outlining progress against the Africa Hubs Annual Distribution Channel Initiatives Implementation Plan. ▪ Close-out Report.
Method of Calculation / Assessment	▪ Simple count of the number of distribution channel initiatives implemented in Africa.
Means of Verification	Verify that the: ▪ Africa Hubs Annual Distribution Channel Initiatives Implementation Plan, with clear milestones per quarter, was approved as per the SA Tourism DOA. ▪ Quarterly Reports outline progress against the Africa Hubs Annual Distribution Channel Initiatives Implementation Plan and is submitted five days after the end of each quarter, approved by the Chief Operations Officer, or the assigned DOA. ▪ Close-out Report produced in Quarter 4 outlining ROI, learnings, and future recommendations approved by the relevant line Executive Manager.
Assumptions	▪ Sufficient budget is allocated. ▪ The hosting policy and hosting platform that is market relevant.

	▪ Working technology and related systems.
	▪ A functioning sa.net website – with SME products and experiences.
	▪ The current DOA remains the same.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operating Officer.

Indicator Title 1.12.1	Number of domestic seasonal campaigns implemented
Definition	The development and implementation of localised marketing campaigns, that have 360° integrated elements of the marketing mix.
Source of Data	▪ Annual Campaign Implementation Plan. ▪ Quarterly Reports outlining progress against the Annual Campaign Implementation Plan. ▪ Close-out Reports.
Method of Calculation / Assessment	▪ Simple count of the number of domestic seasonal campaigns implemented.
Means of Verification	Verify that the: ▪ Annual Campaign Implementation Plan has defined milestones per quarter and was approved in line with the SA Tourism DOA. ▪ Quarterly Reports outlining progress against the Annual Campaign Implementation Plan and were approved by the Chief Operations Officer, or the assigned DOA, within five days after the end of the quarter. ▪ Close-out Reports were approved in line with the SA Tourism DOA, within 60 days after the end of the campaigns.
Assumptions	▪ Sufficient budget. ▪ Working technology and related systems. ▪ Unrestricted market conditions, e.g., COVID-19-related travel restrictions.

Disaggregation of Beneficiaries (where applicable)	The domestic seasonal campaigns seek to promote domestic tourism (holidays and day trips). Increased domestic tourism, and the spend, contributes to the economic impact of tourism, including downstream economic benefit and job creation in the tourism sector.
Spatial Transformation (where applicable)	The domestic seasonal campaigns seek to promote domestic tourism (holidays and day trips) in all nine provinces of the country.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operating Officer.

Indicator Title 1.13.1	**Number of distribution channel initiatives implemented in the domestic market**
Definition	Domestic distribution channels are traditional and non-traditional trade, i.e., media, influencers, corporates, stakeholders. Distribution channel initiatives are platforms that allow for engagement and communication with distribution channels to build destination awareness, interest and/or conversion.
Source of Data	- Domestic Annual Distribution Channel Initiatives Implementation Plan. - Quarterly Reports outlining progress against Domestic Annual Distribution Channel Initiatives Implementation Plan. - Close-out Report.
Method of Calculation / Assessment	Simple count of the number of distribution channel initiatives implemented in-market.
Means of Verification	Verify that the: - Domestic Annual Distribution Channel Initiatives Implementation Plan, with clear milestones per quarter, was approved in line with the South African Tourism DOA. - Quarterly Reports outline progress against Domestic Annual Distribution Channel Initiatives Implementation Plan and is submitted five days after the end of each quarter, approved by the Chief Operations Officer, or the assigned DOA. - Close-out Report was produced in Quarter 4 outlining ROI, learnings, and future recommendations.
Assumptions	- Sufficient budget is allocated. - Hosting policy and hosting platform that are market relevant.

	▪ Execution Lead Hosting Policy and hosting implementation.
	▪ Working technology and related systems.
	▪ B2B Portal on SA.net – Ability to connect SMMEs and trade and consumers.
	▪ A functioning sa.net website – with SME products and experiences.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operating Officer.

Indicator Title 1.14.1	Annual Tourism Economic Impact Communication Plan implemented
Definition	The Annual Tourism Economic Impact Communication Plan will outline a communications activity that will be undertaken each quarter to communicate to the tourism sector and various stakeholders what the tourism sector performance has been for the quarter and the related economic impact. The communications activity to tell the quarterly economic impact story of tourism could be in the form of a round table, or a press release, or a media interview, or one on one media engagements.
Source of Data	▪ FY2024/25 Annual Tourism Economic Impact Communication Plan. ▪ Quarterly Reports detailing progress against the Annual Tourism Economic Impact Communication Plan.
Method of Calculation / Assessment	▪ Assess progress towards implementation of the FY2024/25 Annual Tourism Economic Impact Communication Plan on a quarterly basis.
Means of Verification	Verify that the: ▪ FY2024/25 Annual Tourism Economic Impact Communication Plan was developed and approved in line with South African Tourism's DOA in Quarter 1. ▪ Quarterly Reports detail progress against the FY2024/25 Annual Tourism Economic Impact Communication Plan and were approved by the Chief Marketing Officer, or the assigned DOA, within five days of the end of each quarter.
Assumptions	▪ Sufficient budget is allocated.

	▪ Economic data is provided for publication.
	▪ Working technology and related systems.
	▪ No restrictions or business interruption from unforeseen events.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Marketing Officer.

Indicator Title 1.15.1	**Annual Global PR and Communications Plan implemented**
Definition	A Global Public Relations (PR) and Communications Plan will be developed and implemented for the FY2024/25. This plan will focus on the promotion of both South African Tourism's offerings and destination South Africa's exceptional tourism offerings.
Source of Data	▪ FY2024/25 Annual Global PR and Communications Plan. ▪ Quarterly Reports detailing progress against the implementation of the FY2024/25 Annual Global PR and Communications Plan.
Method of Calculation / Assessment	▪ Assess progress towards implementation of the FY2024/25 Annual Global PR and Communications Plan on a quarterly basis.
Means of Verification	Verify that the: ▪ FY2024/25 Annual Global PR and Communications Plan was approved in line with South African Tourism DOA in Quarter 1. ▪ Quarterly Reports detail progress against the implementation of the FY2024/25 Annual Global PR and Communications Plan and were approved by the Chief Marketing Officer, or the assigned DOA, within five days of the end of each quarter.
Assumptions	▪ There is sufficient budget available. ▪ Working and acceptable tools implemented for performance tracking, e.g., brand management system, data management, media monitoring, and digital asset management. ▪ No restrictions or business interruption from unforeseen events.

Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Marketing Officer.

4. PROGRAMME 4: BUSINESS EVENTS

Indicator Title 1.16.1	Number of B2B brand campaigns implemented
Definition	The development and implementation of a Domestic and a Global Business to Business (B2B) Marketing Campaign focused on targeted economic sectors.
Source of Data	▪ Campaign Plan for Domestic and Global B2B Marketing Campaign. ▪ Quarterly Reports outlining progress against the Campaign Plan for Domestic and Global Business to Business (B2B) Marketing Campaign. ▪ Campaign Close-out Report.
Method of Calculation / Assessment	▪ Simple count of the number of B2B campaigns delivered.
Means of Verification	Verify that the: ▪ Campaign Plan for Domestic and Global Business to B2B Marketing Campaign is approved in line with the SA Tourism DOA. ▪ Quarterly Reports outline progress against the Campaign Plan for Domestic and Global B2B Marketing Campaign and were approved by the Chief Convention Bureau Officer, or the assigned DOA, within five days after the end of the quarter. ▪ Campaign Close-out Report, addressing the goals, KPIs and its measurements, as well as insights and learnings of the campaign, is approved in line with the SA Tourism DOA.
Assumptions	▪ Sufficient budget. ▪ Timeous and relevant content that can be effectively utilised. ▪ Working marketing technologies to communicate content to business events audiences.

Disaggregation of Beneficiaries (where applicable)	The B2B brand campaigns seek to attract international MICE events, and delegates, to South Africa. Increased tourist arrivals to South Africa, and their spend, contributes to the economic impact of tourism, including downstream economic benefit and job creation in the tourism sector.
Spatial Transformation (where applicable)	The B2B source market campaigns seek to promote increased tourist arrivals to South Africa, including a focus on improving the geographic spread of arrivals and spend across the nine provinces of the country.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Convention Bureau Officer.

Indicator Title 1.17.1	**Number of bid submissions**
Definition	The number of bid submissions will be tracked with regards to bid submissions for international and regional business events (meetings, incentives, conventions, and exhibitions) that will be supported by the South Africa National Convention Bureau. Each bid submission needs to meet the minimum requirements of the Revised Bid Support Programme.
Source of Data	▪ List of the bids supported on a quarterly basis.
Method of Calculation / Assessment	▪ Simple count of the number of bids submitted.
Means of Verification	Verify that bid support letters were signed by the Chief Convention Bureau Officer.
Assumptions	▪ Sufficient budget to ensure that commitments are fulfilled. ▪ Each bid submission starts with a lead sourcing process to identify and qualify a potential piece of business. The lead sourcing process can take up to two to three years to convert a lead into a bid submission. ▪ Each bid submission requires a coordinated effort, including various value chain stakeholders (association, venue, professional conference organiser (PCO), etc.) to develop a bid strategy and bid document that responds to the hosting requirements of the event owner(s). ▪ Available Budget for execution.
Disaggregation of Beneficiaries (where applicable)	Not applicable.

Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Higher than targeted performance is desirable.
Indicator Responsibility	Divisional Head: Chief Convention Bureau Officer.

Indicator Title 1.17.2	Number of business events hosted in Villages, Townships and Small Dorpies (VTSDs)
Definition	The number of National Association business events supported within South Africa and hosted in VTSDs.
Source of Data	▪ Finalised memorandum of agreements (MOAs) between South African Tourism and the host organisation for each event.
Method of Calculation / Assessment	▪ Simple count of the number of National Association business events hosted in VTSDs.
Means of Verification	▪ Verify that finalised memorandum of agreements (MOAs) between South African Tourism and the host organisation were in place for each business event hosted in a VTSD.
Assumptions	▪ The ability of National Associations to participate in the programme and host their business events in VTSDs. ▪ Sufficient budget
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Higher than targeted performance is desirable.
Indicator Responsibility	Divisional Head: Chief Convention Bureau Officer.

Indicator Title 1.17.3	Number of Business Events Bidding Impact Reports
Definition	The Business Events Bidding Impact Report is a data and insights report on the SANCB's bidding performance.
Source of Data	▪ Bid support letters. ▪ Bid award correspondence. ▪ Business Events Bidding Impact Reports.
Method of Calculation / Assessment	▪ Simple count of the number of Business Events Bidding Impact Reports produced.
Means of Verification	Verify that the: ▪ Bi-annual Business Events Bidding Impact Report were produced in Quarters 2 and 4 and were signed by the Chief Convention Bureau Officer, or the assigned DOA, within five days after the end of the respective quarters.
Assumptions	Quality assurance assistance from the Analytics and Insights business unit.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Bi-annually.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Convention Bureau Officer.

Indicator Title 1.18.1	Africa's Travel Indaba hosted
Definition	Hosting of Africa's Travel Indaba 2024 successfully, as a strategic business event, in order to benefit the tourism industry.
Source of Data	▪ Africa's Travel Indaba 2024 Project Plan. ▪ Online diary system
Method of Calculation / Assessment	▪ Simple count of the number of events hosted.
Means of Verification	Verify that the:

	▪ Event was hosted as evidenced through the Post-Show Impact Report for Africa's Travel Indaba 2024, which was approved in line with the SA Tourism DOA seven months after the end of the event.
Assumptions	Sufficient budget and Africa's Travel Indaba 2024 will be hosted and will not be cancelled.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Non-cumulative.
Reporting Cycle	Annually.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Convention Bureau Officer.

Indicator Title 1.18.2	Meetings Africa hosted
Definition	Hosting of Meetings Africa 2025 successfully, as a strategic business event, in order to benefit the tourism industry.
Source of Data	▪ Meetings Africa 2025 Project Plan. ▪ Online diary system.
Method of Calculation / Assessment	▪ Simple count of the number of events hosted.
Means of Verification	Verify that the: ▪ Event was hosted as evidenced through the Post-show Impact Report for Meetings Africa, which was approved in line with the SA Tourism DOA.
Assumptions	Sufficient budget and Meetings Africa 2024 will be hosted and will not be cancelled.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Non-cumulative.
Reporting Cycle	Annually.

Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Convention Bureau Officer.

Indicator Title 1.18.3	Number of international strategic platforms participated in
Definition	Participating at international strategic platforms, as identified by the organisation, in order to benefit the tourism industry.
Source of Data	▪ Project Plan per strategic platform. ▪ Online diary system
Method of Calculation / Assessment	▪ Simple count of the number of strategic platforms that South African Tourism participated in.
Means of Verification	Verify that the: ▪ Events were participated in as evidenced by the Post-show Report, which was approved in line with the SA Tourism DOA within two months after the end of the strategic platform participation.
Assumptions	Sufficient budget and International strategic platforms will be hosted and will not be cancelled.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Non-cumulative.
Reporting Cycle	Annually.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Convention Bureau Officer.

5. PROGRAMME 5: TOURIST EXPERIENCE

Indicator Title 1.19.1	Number of graded establishments
Definition	The number of tourism establishments that join the Tourism Grading Council of South Africa Star Grading Membership Scheme and are graded.
Source of Data	▪ Total Quality in Tourism (TQiT) System.

Method of Calculation / Assessment	▪ Simple count of the number of valid members on the TQiT System.
Means of Verification	▪ Verify the number of graded establishments as per the quarterly TQiT System generated reports within five days after the end of each quarter.
Assumptions	▪ Establishments find value in grading. ▪ The economy does not lead to establishments shutting down.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined targets is desirable.
Indicator Responsibility	Divisional Head: Chief Quality Assurance Officer.

Indicator Title 1.20.1	Three-Year Tourism Value Chain and Barrier Strategy implemented
Definition	The Three-Year Tourism Value Chain Strategy (2024-2027) was developed. This strategy focuses on improving the quality of the visitor's experiences across the different touchpoints of the tourism value chain. The strategy is supported by a roadmap that outlines deliverables per year for each of the three years.
Source of Data	▪ Three-Year Tourism Value Chain Strategy (2024-2027). ▪ FY2024/25 Roadmap for the Three-Year Tourism Value Chain Strategy (2024-2027). ▪ Quarterly reports detailing progress against the FY2024/25 Roadmap for the Three-Year Tourism Value Chain Strategy (2024-2027).
Method of Calculation / Assessment	▪ Assess progress against the FY2024/25 Roadmap for the Three-Year Tourism Value Chain Strategy (2024-2027) on a quarterly basis.
Means of Verification	Verify that the: ▪ FY2024/25 Roadmap for the Three-Year Tourism Value Chain Strategy (2024-2027) was finalised in Quarter 1. ▪ Quarterly Reports detail progress against the FY2024/25 Roadmap for the Three-Year Tourism Value Chain Strategy (2024-2027) and were approved by the Chief Quality Assurance Officer, or the assigned DOA, within five days after the end of each quarter.

Assumptions	- Sufficient budget to deliver all areas. - Tourism value chain touchpoints are vast; thus, South African Tourism may only be able to influence those that are within its scope of control. - Successful procurement of services required to deliver the Three-Year Strategy and Roadmap. - Successful conclusion of MOUs and partnerships with key strategic partners.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Quality Assurance Officer.

Indicator Title 1.21.1	Global Trade Programme implemented
Definition	The Global Trade Programme is critical to stimulate demand in our markets as we must grow trips from and within the country. South Africa needs to be sold effectively by both trade and channel to contribute to economic growth and support the Tourism Sector Master Plan.
Source of Data	- FY2024/25 Global Trade Plan. - Quarterly reports detailing progress against the FY2024/25 Global Trade Plan.
Method of Calculation / Assessment	Assess progress against the FY2024/25 Global Trade Plan on a quarterly basis.
Means of Verification	Verify that the: - FY2024/25 Global Trade Plan was approved in line with the South African Tourism DOA in Quarter 1. - Quarterly Reports detail progress against the FY2024/25 Global Trade Plan and were approved by the Chief Quality Assurance Officer, or the assigned DOA, within five days of the end of the quarter.
Assumptions	- Sufficient budget. - Working technology and related systems. - Successful procurement or conclusion of all third party agreements.

Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per the defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Quality Assurance Officer.

ANNEXURES TO THE ANNUAL PERFORMANCE PLAN

ANNEXURE A: AMENDMENTS TO THE STRATEGIC PLAN

The process to develop this FY2024/25 APP began with reviewing and confirming the amendments made to the approved Five-Year Strategic Plan 2020-2025, included as Annexure A to the FY2021/22 APP.

The review confirmed that:

1) There are no material changes to the information reflected in Part A of the revised Five-Year Strategic Plan 2020-2025. Recent updates to regulations and institutional policies and strategies are reflected in Part A of this APP.

2) There are no changes to the Vision, Mission, and Values reflected in Part B of the revised Five-Year Strategic Plan 2020-2025.

3) There are no changes to the impact statement or the outcomes statements reflected in Part C of the revised Five-Year Strategic Plan 2020-2025.

Through the amendment in Annexure A of the FY2022/23 APP, to best align the planning framework with the discussions with South African Tourism stakeholders in the public and private sectors, 4 sub-outcomes were introduced. While the 13 outcome indicators are retained, their sequence is changed to align with the 4 sub-outcomes.

Further, certain adjustments to five-year targets, arising from the mid-term assessment of progress against the Five-Year Strategic Plan, were made.

The amendments are retained as follows:

Introduction of Sub-Outcomes, and Amendments to Outcome Indicators and Five-Year Targets:

OUTCOME	SUB-OUTCOME INTRODUCED	AMENDMENT TO OUTCOME FIVE-YEAR TARGETS			NOTE ON AMENDMENT
		Outcome indicator	Baseline (2019/20)	Five-year target (By March 2025)	
1. Increase the tourism sector's contribution to inclusive economic growth	1. Demand creation	Progress towards doubling international tourist arrivals to 21 million by 2030 (SONA 2019)	10.3 million	Increase international tourist arrival with 6% annually by 2024	No change to target

OUTCOME	SUB-OUTCOME INTRODUCED	AMENDMENT TO OUTCOME FIVE-YEAR TARGETS			NOTE ON AMENDMENT
		Outcome indicator	**Baseline (2019/20)**	**Five-year target (By March 2025)**	
		Rand value of international tourist spend	R87.4 billion	R86.7 billion	Indicator and target revised downward owing to the impact of COVID-19.
		Number of domestic holiday trips	7.1 million	10.8 million.	Target adjusted upwards from 7.1 million due to positive domestic tourism performance as a result of COVID-19 travel restrictions internationally.
		Rand value of domestic holiday direct spend	R17.3 billion	R33.5 billion	Target adjusted upwards from R17.3 billion due to positive domestic tourism performance as a result of COVID-19 travel restrictions internationally.
		Number of international business events hosted	230	111 (cumulative 2020/21-2024/25)	Target revised owing to the impact of COVID-19.
	2. Demand fulfilment	Seasonality of tourist arrivals	1.3%	1.3%	No change to target
		Geographic spread of international tourist arrivals	20%	13.9%	Target revised downward owing to the impact of COVID-19.
		Geographic spread of domestic tourist arrivals	8%	8%	No change to target
		Net Promoter Score	91.0%	-	Target removed from Five-Year

OUTCOME	SUB-OUTCOME INTRODUCED	AMENDMENT TO OUTCOME FIVE-YEAR TARGETS			NOTE ON AMENDMENT
		Outcome indicator	Baseline (2019/20)	Five-year target (By March 2025)	
					Strategic Plan and moved to Annual Operational Plan
		Number of SMME businesses supported	182	1 096 (cumulative 2020/21-2024/25) *(Through both business events platforms and Visitor Experience events and hosting itineraries)*	Target adjusted upwards from 255
2. Achieve good corporate and cooperative governance	2. Improved corporate reputation	South African Tourism Corporate Brand Index	N/A Baseline to be determined in 2021/22	Improve from 68.24 (baseline established in FY 2021/22)	Five-year target introduced, based on findings of baseline study in 2021/22
		External audit outcome	Unqualified audit outcome	Unqualified audit outcome maintained	No change to target

The following outcome Technical Indicator Description is amended in 2023/24 as part of the planning process for FY24/25 to holistically reflect the work of the organisation in supporting SMMEs:

Outcome Indicator Title 1.10	Number of SMME businesses supported
Definition	The number of SMMEs that are assisted or supported through SA Tourism's operations and by the SA Tourism Business Units. The support may include, among other, access to tradeshow platforms, market access support, marketing support, hosting, quality assurance support, training and development, enterprise development support, etc. This is to ensure that SMMEs gain exposure and to facilitate inclusive growth for the sector.
Source of data	South African Tourism list of SMMEs are assisted or supported through SA Tourism's operations and by the SA Tourism Business Units.
Method of Calculation / Assessment	Count of SMMEs that are assisted or supported through SA Tourism's operations and by the SA Tourism Business Units.
Assumptions	▪ SMMEs show an interest in SA Tourism assistance or support. ▪ SMMEs will have resources to provide the required service. ▪ Tradeshows have limited space which means that there will be a limit on the number of SMMEs that can attend the various tradeshows.
Disaggregation of Beneficiaries (where applicable)	South African Tourism has identified its thresholds, based on "black designated groups" as defined under the codes of best practice issued in terms of Section 9(1) of the Broad Based Black Economic Empowerment Act (2003), and will target: i) Enterprises which are at least 60% black-youth-owned and -operated ii) Enterprises which are at least 60% black-woman-owned and -operated iii) Enterprises which are at least 30% black-people-with-disabilities-owned and -operated
Spatial Transformation (where applicable)	Not applicable
Reporting Cycle	Annual progress against the five-year target
Desired Performance	1096 SMME businesses supported by 2025 (cumulative)
Indicator Responsibility	All SA Tourism Executive Managers.

ANNEXURE B: CONDITIONAL GRANTS

Not applicable to South African Tourism.

ANNEXURE C: CONSOLIDATED INDICATORS

Not applicable to South African Tourism.

ANNEXURE D: DISTRICT DEVELOPMENT MODEL

Not applicable to South African Tourism.