



South African Tourism

FY25/26

Quarter 1 Performance Report

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Abbreviations and Acronyms

AGSA	Auditor General of South Africa
AI	Analytics and Insights
APP	Annual Performance Plan
ARCO	Audit and Risk Committee
B2B	Business to Business
B&M	Brand and Marketing
BONDay	Business Opportunities and Networking Day
DigiTech	Digital Transformation & Technology
EPMO	Enterprise Project Management Office
ExCo	Executive Committee
FY	Financial Year
GIR	Government and Industry Relations
HC	Human Capital
HCREMCO	Human Capital and Rewards Committee
IA	Internal Audit
ICT	Information and Communication Technology
MARCOM	Marketing and Commercial Committee
MICE	Meetings, Incentives, Conferences & Trade Exhibitions
MOA	Memorandum of Agreement
MOU	Memorandum of Understanding
OCEO	Office of Chief Executive Officer
OPCA	Operation Clean Audit
PFMA	Public Finance Management Act
PR	Public Relations
Q 1	Quarter 1
SANCB	South African National Convention Bureau
SA Tourism	South African Tourism
SAT	South African Tourism
SATOVITO	South African Township and Village Tourism Association
SCM	Supply Chain Management
SMME	Small, Medium and Micro Enterprise/s
SPEPM	Strategic Planning, Evaluation and Programme Management
TBCSA	Tourism Business Council of South Africa
TE	Tourism Execution
TGCSA	Tourism Grading Council of South Africa
VE	Visitor Experience
VTSD	Villages, Townships and Small Dorpies

Performance Legend

In line with the approved Performance Information Management, Monitoring and Reporting Framework, performance reports must indicate the performance results using the following legend:

Performance Result	Description
	Target fully achieved (100% achievement of a target) by the stipulated due date and in compliance with all aspects of the Technical Indicator Description (TID)
	Target not achieved (less than 100% achievement of a target) by the stipulated date and/or not in compliance with most aspects of the TID

1. Introduction

This report presents an overview of South African Tourism's performance for Quarter 1 (April to June 2025) of the financial year 2025 to 2026 (FY25/26) including governance matters.

2. Tourism Sector Performance

2.1 International Tourism

Strong Recovery Continues

International tourism remains on a positive growth trajectory, with over 300 million tourists travelling globally in Quarter 1 of 2025 - a 5% increase from 2024 and 3% above 2019 levels. This resilience persists despite global inflation, geopolitical tensions, and rising travel costs (UNWTO Global Outlook Quarter 1 of 2025).

Regional Highlights

- Africa: Up 9% year-on-year, and 16% above 2019 levels - among the strongest performers.
- Asia Pacific: Rebounded 12%, reaching 92% of pre-pandemic volumes.
- Europe: Up 2%, led by strong performance in Central and Eastern Europe (+8%).
- Americas: Grew 2%, with South America seeing a notable 13% rise.
- Middle East: Slower 1% growth, but still 44% above 2019.

Aviation & Accommodation

- Air travel demand rose 8%, with capacity up 7% (IATA).
- Hotel occupancy remained stable at 64% in March.

Tourism Spending (Receipts)

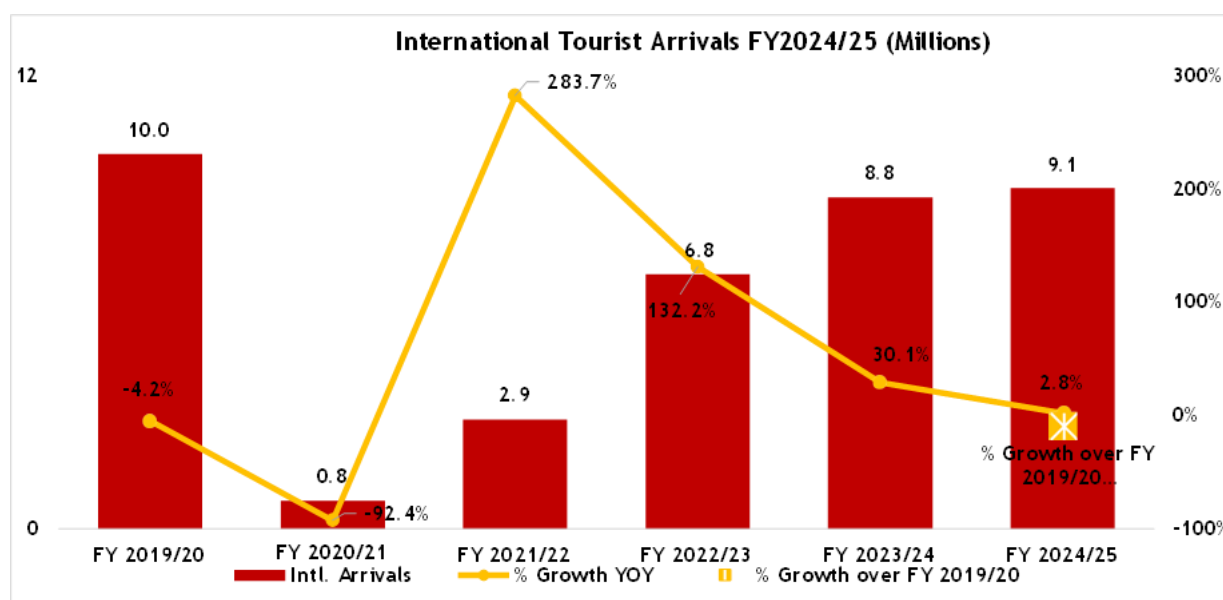
- Quarter 1 of 2025: Solid growth across many markets.
- Japan (+34%), Spain (+9%), France (+6%), Turkey (+7%), USA (+3%).
- 2024 full-year export revenues revised up to a record USD 2.0 trillion, or 6% of global exports.
- Average international trip spending reached USD 1 170 (vs. USD 1 000 pre-pandemic).
- Top outbound markets: China (+30%), UK (+16%), Canada (+13%), USA (+12%).

Outlook for 2025

- UN Tourism maintains a 3% to 5% growth forecast for the year.
- Key risks: Weak economic growth, high travel costs, trade tariffs, and geopolitical instability.
- Travel patterns may shift toward value-for-money, closer destinations, and shorter trips.
- Confidence Index for May to August 2025 reflects cautious optimism, with 45% of experts expecting stronger performance than last year.

2.2 South Africa's Tourism Performance

In the fiscal year 2024/25, South Africa observed a momentous upswing in international tourist influx, with arrivals peaking at 9.1 million. This represented a positive year-on-year growth of 2.8% over the previous financial year. However, the performance stands at 9.0% under below pre-pandemic levels in 2019/20,. This shows the significant strides made in the sector despite the ongoing recovery process.



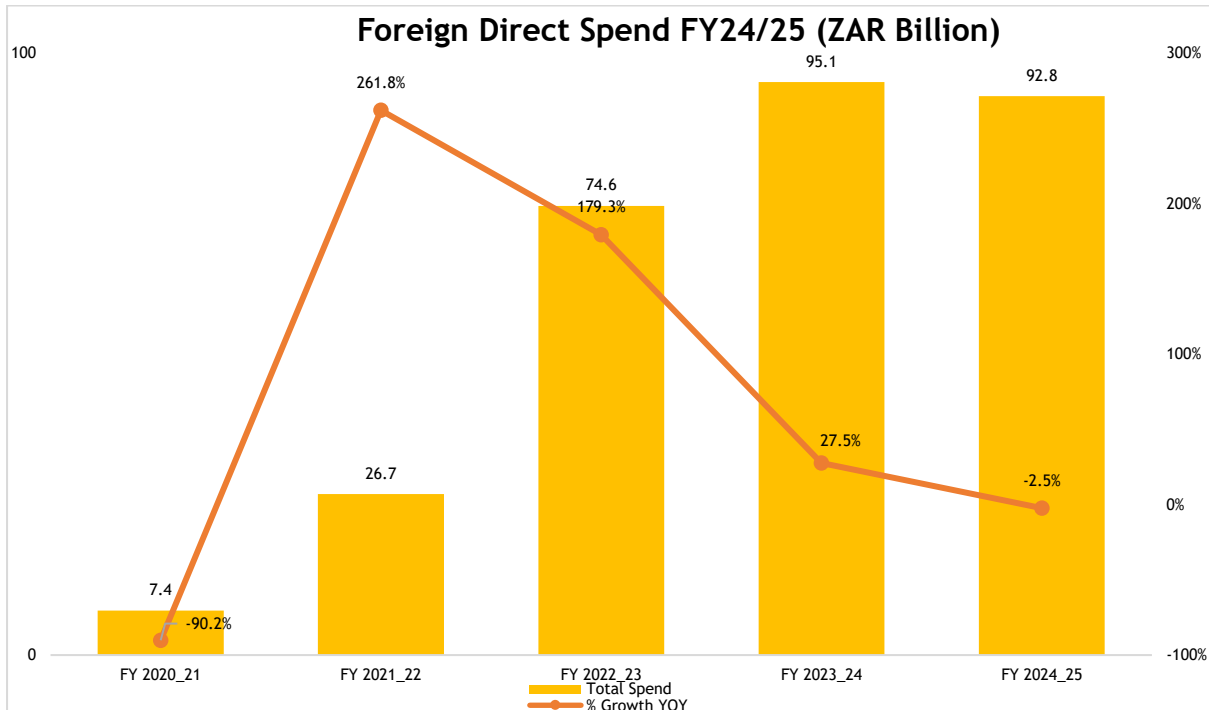
Source: Statistics South Africa International Tourism P0350 FY2024/25

South Africa welcomed a diverse array of international travellers, with the largest segment hailing from the African region, accounting for an impressive 6.9 million arrivals. Europe followed as the second-largest source market, contributing 1.3 million arrivals, while the Americas accounted for 512,596 arrivals. Encouragingly, all these regions exhibited growth, when compared to the 2023/24 financial year. In terms of the distribution of arrivals, the African region maintained the most substantial share, holding 76.1% of the total. Europe followed, making up 14.0% of the arrivals.

Tourist Arrivals by Region	FY2023/24	FY2024/25	FY2024/25 Growth %	FY2024/25 share of arrivals
Africa	6 683 463	6 891 040	3.1%	76.1%
Africa Land	6 416 076	6 579 381	2.5%	72.6%
Africa Air	267 387	311 659	16.6%	3.4%
Europe	1 278 308	1 267 234	-0.9%	14.0%
Americas	469 105	512 596	9.3%	5.7%
Asia	209 378	208 955	-0.2%	2.3%
Australasia	105 972	121 614	14.8%	1.3%
Middle East	51 426	45 796	-10.9%	0.5%
Total	8 810 010	9 059 419	2.8%	100.0%

Source: Statistics South Africa International Tourism P0350 FY2024/25

Total foreign direct spend declined slightly by 2.5%, reaching R92.8 billion in FY2024/25, from R95.1 billion in FY2023/24.



Source: South African Tourism Departure Survey FY2024/25

Tourists from Africa and Europe remain the biggest spenders when visiting South Africa. Even though these two regions make up 90.1% of our tourist arrivals, they do not spend in the same way. African tourists represent a big proportion of our arrivals (76.1%), but they only account for 45.9% of the total spending. On the other hand, Europe, despite making up only 14.0% of our tourist arrivals, contributes a whopping 30.6% to the total spending.

Spend by Region	FY2023/24 (Billions)	FY2024/25 (Billions)	FY2024/25 % Growth	FY2024/25 % Share
Africa	R43 929 093 202	R42 550 997 684	-3.1%	45.9%
Africa Land	R38 798 855 009	R36 638 371 100	-5.6%	39.5%
Africa Air	R5 130 238 193	R5 912 626 584	15.3%	6.4%
Europe	R31 255 431 720	R28 377 392 343	-9.2%	30.6%
Americas	R12 216 528 893	R14 367 921 849	17.6%	15.5%
Asia	R3 955 364 599	R3 847 071 644	-2.7%	4.1%
Australasia	R2 549 450 332	R2 524 181 734	-1.0%	2.7%
Middle East	R1 237 302 627	R1 122 858 097	-9.2%	1.2%
Total	R95 143 171 374	R92 790 423 352	-2.5%	100.0%

Source: South African Tourism Departure Survey FY2024/25

2.3 South Africa's Domestic Tourism

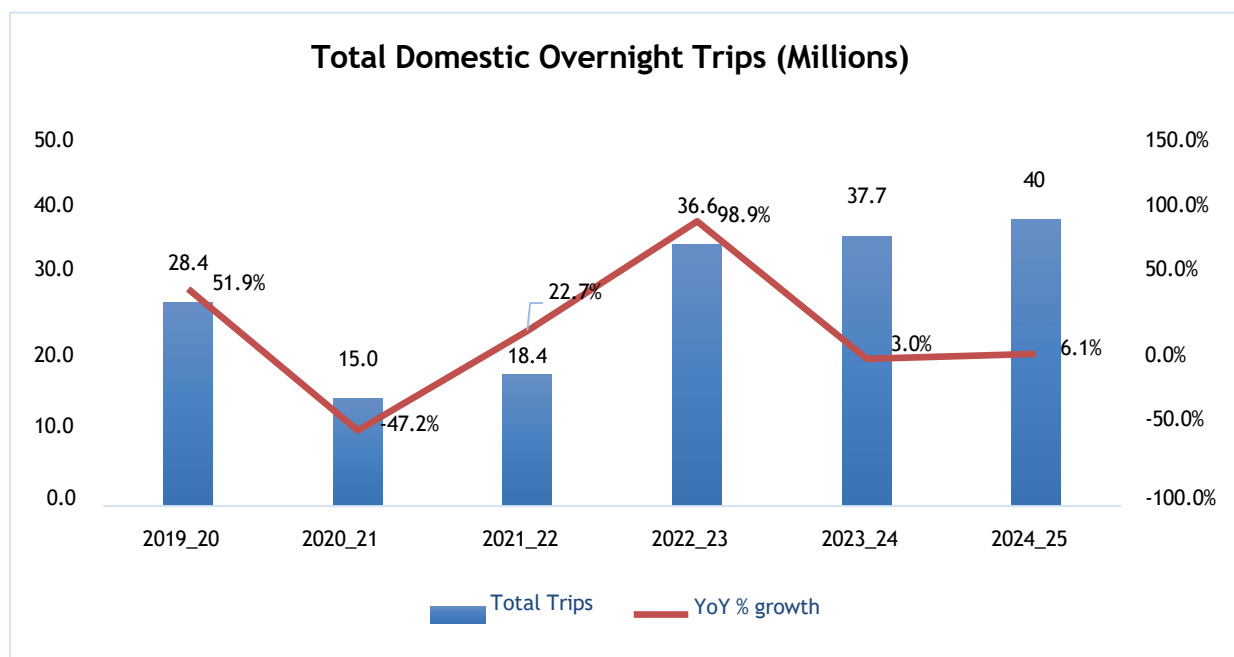
Domestic overnight travel continued its upward trajectory in 2024/25, with 40.0 million trips recorded, up from 37.7 million in the previous year. The 6.1% increase—while modest—reflects a sustained appetite for local travel, reaffirming domestic tourism's critical role in driving the sector's stability and growth.

Total overnight spend grew by 7.6%, rising from R123.8 billion in 2023/24 to R133.1 billion in 2024/25. This solid increase signals healthy expenditure across accommodation, food, transport, and related services.

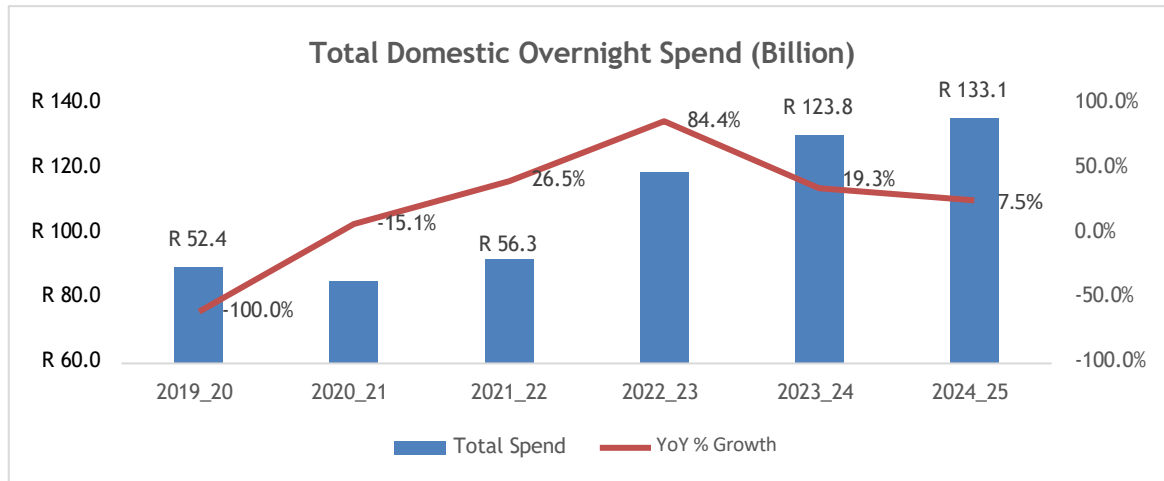
Despite an 8.1% decline in overnight holiday trips (from 12.6 million to 11.5 million), total holiday spend rose by 7.9%, reaching R61.0 billion. This indicates that leisure travellers are spending more per trip—potentially driven by longer stays, premium experiences, or increased travel costs.

Day trips held steady, with a marginal 1.3% decline from 125.2 million to 123.6 million. However, day trip spend grew by 2.8% to R145.2 billion, suggesting a rise in spend per outing or increased demand for quality day experiences.

Together, these trends point to a resilient domestic market, with South Africans continuing to explore their country, contributing meaningfully to tourism's economic footprint.



Source: South African Tourism Domestic Survey FY24/25



Source: South African Tourism Domestic Survey FY24/25

2.4 Emerging Risks

Global Challenges (UNWTO)

- High travel costs (inflation, rising transport and accommodation prices)
- Geopolitical tensions impacting consumer confidence & travel demand; and
- Extreme weather events affecting destinations.

International Tourism

- South Africa is below 2019 arrivals while the continent has recovered;
- Key source markets, such as Europe & Asia, are performing less than total arrivals growth performance; and
- Current geopolitical tensions with USA may pose a risk on arrivals, however, this is yet to be confirmed.

3. Budget Programme Structure

3.1 Budget Programme Structure

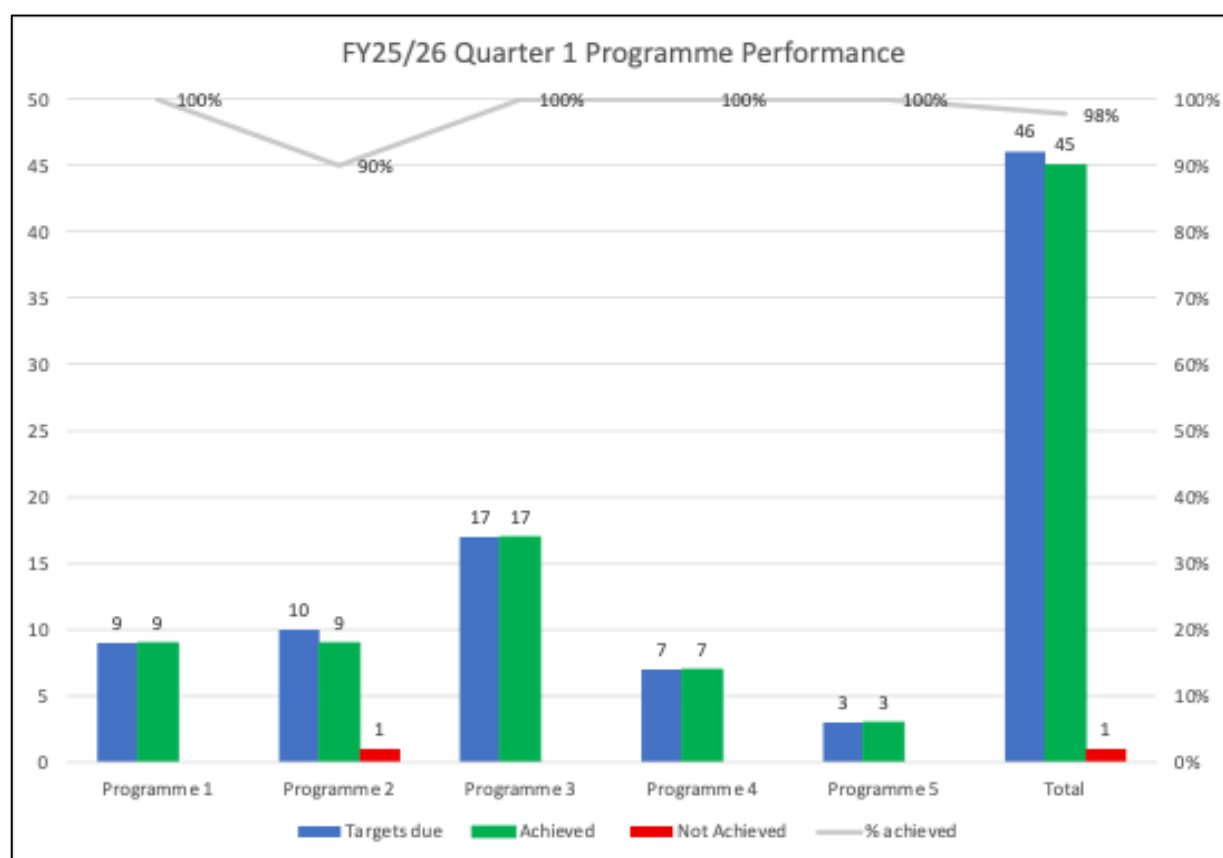
South African Tourism is structured according to five Budget Programmes, which informs the FY25/26 Annual Performance Plan (APP):

Programme	Purpose of Programme	Business Units
Programme 1: Corporate Support	The Corporate Support Programme is responsible for providing effective support services to the organisation, as well as ensuring compliance with statutory requirements; and ensuring strategy development and integration with business performance, monitoring, governance, and evaluation.	<ul style="list-style-type: none"> Internal Audit (IA) Governance, Risk & Compliance and Company Secretariat (GRC) Finance & Supply Chain Management (SCM) including Facilities Management Human Capital (HC) Management Information Communication & Technology (ICT) Office of CEO (OCEO) including Strategic Planning, Evaluation & Programme Management (SPEPM)
Programme 2: Business Enablement	The Business Enablement Programme is responsible for enhancing collaboration with various stakeholders; and providing centralised tourism intelligence to support evidence-based decision-making.	<ul style="list-style-type: none"> Government & Industry Relations (GIR) Digital Transformation & Technology (DigiTech) Analytics and Insights (AI)
Programme 3: Leisure Tourism Marketing	The Leisure Tourism Marketing Programme is responsible for creating demand through travel acquisition and growing brand equity for South Africa as a leisure and business events destination, in identified markets.	<ul style="list-style-type: none"> Brand & Marketing (B&M) Global Public Relations (PR) & Communications Tourism Execution (TE)
Programme 4: Business Events	The Business Events Programme is responsible for growing the nation's business events industry.	<ul style="list-style-type: none"> Business Development & Support Services Meetings, Incentives, Conferences & Trade Exhibitions (MICE) Sales Strategic Platforms & Events
Programme 5: Visitor Experience	The Tourist Experience Programme is responsible for ensuring the delivery of quality assured tourist / visitor experiences, which are diverse, unique, and enriched.	<ul style="list-style-type: none"> Quality Assurance & Development Visitor Experience Brand Experience Global Trade

3.2 Quarter 1 Performance

South African Tourism achieved the following performance results for Quarter 1 of FY25/26:

Programme	Total Number of Targets Planned for Quarter 1	Achieved	Not Achieved
1: Corporate Support	9	100% (9 of 9)	0% (0 of 9)
2: Business Enablement	10	90% (9 of 10)	10% (1 of 10)
3: Leisure Tourism Marketing	17	100% (17 of 17)	0% (0 of 17)
4: Business Events	7	100% (7 of 7)	0% (0 of 7)
5: Tourist Experience	3	100% (3 of 3)	0% (0 of 3)
Total	46	98% (45 of 46)	2% (1 of 46)



3.3 Key Achievements

Programme 1: Corporate Support

- Towards enhancing the internal control environment and mitigation of audit findings, SA Tourism implemented 59% of valid internal and external audit recommendations, exceeding the target of 25%.
- Implemented the Operation Clean Audit Programme where the three meetings of the OPCA Steering Committee focused on the status of audit findings and their root causes, financial year end processes, and areas of improvement required within the internal control environment.
- In finalising investment requirements for FY25/26, SA Tourism confirmed budget allocations for each business unit for the FY2025/26 and related accountability (S57 of PFMA) through signed budget allocation letters.
- To promote, integrity and ethical conduct in the procurement of goods and services, SA Tourism conducted a joint capacity building exercise and created awareness for procurement committees and the organisation on the SCM code of conduct on 19th and 23rd June 2025.
- Implemented the Peer Recognition Programme to recognise employees for living the organisation's values.
- Reviewed the operating model for optimal functioning of the entity through a structural optimisation process.
- Developed the Productivity Matrix to determine the productivity measures that will be assessed within SA Tourism.

Programme 2: Business Enablement

- Two tourism information tracking surveys were undertaken through fieldwork, namely the Departure Survey and the Domestic Tourism Survey, to track tourism information, monitor arrivals, spend, and brand performance.
- The Framework for the Sentiment Index was developed which will enable South African Tourism to communicate tourist perceptions and measure the level of user satisfaction of South Africa as a destination.
- A strategic dialogue with tourism sector role-players was convened on 30th June 2025 focusing on preparations for the TBCSA Leadership Conference, scheduled for 17th to 19th September 2025.
- The Johannesburg Expo Centre was recognised as the first entity that was graded. This recognition was published in the Tourism Tuesday Newsletter on 4th June 2025.
- Engagements were convened between TBCSA and SA Tourism on 25th April and 20th June 2025 to define ways of working and areas of collaboration, guided by the MOU. In addition, the TOMSA levy collectors list was shared with SA Tourism in relation to discounts for ATI.
- The CEOs Forum with Provincial Tourism Authorities was held on 30th June 2025 focusing on tourism transformation. Quarter 2 plans were also discussed including provincial visits and a joint planning session.

Programme 3: Leisure Tourism Marketing

- Developed and deployed the FY25/26 Global Tourism Brand Campaign toolkit. The approved toolkit is designed to guide and enable in-market implementation in alignment with the core messaging and visual identity of the campaign.
- Implemented a Global Tourism Brand campaign activity at Africa's Travel Indaba, for immersive, interactive experiences at the Brand Village where ATI delegates were invited to

reconnect with African hospitality. The activation at ATI positioned SA Tourism as a driving force in promoting tourism development, economic participation and brand awareness. This initiative was aimed to enhance brand visibility, showcase the country's diverse travel offerings, and stimulate economic opportunities, particularly for SMMEs and tourism entrepreneurs.

- Implemented one communication activity to profile destination South Africa at Africa's Travel Indaba, through a partnership with CNBC Africa to host the Township and Rural Tourism panel discussion.
- Implemented 14 global public relations and communications activities to strengthen the destination brand, exceeding the target of nine. Opportunities were leveraged in partnership with the greater tourism industry in showcasing destination South Africa.
- Marketing plans have been developed for all regions, including Domestic, Africa, Americas, Europe, Asia Australasia and Embassy Support markets.
- To drive conversion, distribution channel initiatives were implemented in all regions, including Domestic, Africa, Americas, Europe, Asia Australasia and Embassy Support markets.

Programme 4: Business Events

- Africa's Travel Indaba 2025 was hosted from 13th to 15th May 2025, preceded by BonDay on 12th May 2025. The event had 1 348 exhibitors, participating from 27 countries across the continent. an increase of 6.0% from the prior year. Overall attendance increased by 7.7% with 9 990 total attendees.
- In building the pipeline of future business events to be hosted in South Africa, the organisation supported 41 bid submissions for the MICE industry.
- Hosted 3 business events in VTSDs as follows:
 - The Public Health Association of South Africa Conference held from 6th to 9th April 2025 in Rawsonville, Western Cape;
 - The South African Institute of Agricultural Engineers (SAIAE) Two-Day Packhouse Conference and CPD Event held from 26th to 27th June 2025 in Malelane, Mpumalanga; and
 - The Digital Transformation in Mining Conference held from 25th to 26th June 2025, in Muldersdrift, Gauteng.
- A total of 42 South African tourism products were promoted at global market access platforms:
 - 20 products were promoted at the Arabian Travel Market from 28th April to 1st May 2025; and
 - 22 products were promoted at IMEX Frankfurt from 20th to 22nd May 2025.

Programme 5: Tourist Experience

- A total of 4 447 graded establishments were graded against a target of 1 125. A high number of already active establishments graded by March 2025 continued their grading status into Quarter 1.
- The BQV Programme was implemented in Gauteng. The BQV evaluators conducted assessment evaluations across several areas, including Pretoria, Soshanguve, Ga-Rankuwa, Mamelodi and Atteridgeville. The Provincial Quality Assurance Specialists commenced with pre-screening of the properties that were evaluated.
- To promote air access, SA Tourism implemented one initiative to support air access through the Tourism Route Development Marketing Plan, namely the Africa's Travel Indaba Air Pavillion.

3.4 Area/s of Under-Performance

The following target was not achieved:

Quarter 1 Planned Performance April - June 2025	Quarter 1 Actual Performance	Variance	Reasons for Deviation / Attributes for Success	Corrective Measure/s
Develop the phased approach for the development of the traveller application digital platform for approval	Developed the phased approach for the development of the traveller application digital platform for approval, however, this approach was not approved.	Target not achieved	The phased approach was not submitted to ExCo on time due to an oversight within the responsible business unit, which affected timely submission for approval.	The submission on the phased approach to ExCo for approval has been finalised and will be tabled at the next ExCo. To prevent a recurrence, a strengthened internal timeline management system has been implemented within the responsible business unit, including earlier review checkpoints by the Executive Manager and stricter adherence to governance processes. Consequence management will also be effected in relation to the under-performance.

3.5 Detailed Quarter 1 Non-Financial Performance Report

3.5.1 Programme 1: Corporate Support

OUTPUT	OUTPUT INDICATORS	2025/26 ANNUAL TARGET	QUARTERLY TARGETS				
			Quarter 1 Planned Performance Apr - Jun 2025	Quarter 1 Actual Performance Apr - Jun 2025	Variance	Reasons for Deviation / Attributes for Success	Corrective Measure/s
Enhanced internal control environment and mitigation of audit findings	Percentage of valid internal and external audit recommendations implemented	Implement 100% of valid audit recommendations	Implement 25% of valid internal and external audit recommendations	Implemented 59% of valid internal and external audit recommendations.	Target exceeded.	Management closed additional findings that were not due in Quarter 1.	None required.
Operation Clean Audit implemented towards an improved audit outcome and sound governance	Annual Operation Clean Audit Programme implemented	Implement the FY25/26 Operation Clean Audit Programme	Implement the Operation Clean Audit Programme	Implemented the Operation Clean Audit Programme where the three meetings of the OPCA Steering Committee focused on the status of audit findings and their root causes, financial year end processes, and areas of improvement required within the internal control environment.	Target achieved.	Internal collaboration.	None required.
Strengthened compliance, integrity and ethical conduct in procurement (as per PFMA Section 57)	Number of initiatives that promote compliance, integrity and ethical conduct in the procurement of goods and services implemented	Implement 8 initiatives that promote compliance, integrity and ethical conduct in the procurement of goods and services	Confirm budget allocation for each business unit for the FY2025/26 and related accountability (S57 of PFMA)	Confirmed budget allocations for each business unit for the FY2025/26 and related accountability (S57 of PFMA) through signed budget allocation letters.	Target achieved.	Effective internal controls.	None required.
			Conduct capacity building for procurement committees	Conducted a joint capacity building exercise and created awareness for procurement committees and the organisation on the SCM code of conduct on 19 th and 23 rd June 2025.	Target achieved.	Effective internal controls.	None required.
			Create organisation-wide awareness on the SCM code of conduct	Conducted a joint capacity building exercise and created awareness for procurement committees and the	Target achieved.	Effective internal controls.	None required.

OUTPUT	OUTPUT INDICATORS	2025/26 ANNUAL TARGET	QUARTERLY TARGETS				
			Quarter 1 Planned Performance Apr - Jun 2025	Quarter 1 Actual Performance Apr - Jun 2025	Variance	Reasons for Deviation / Attributes for Success	Corrective Measure/s
				organisation on the SCM code of conduct on 19 th and 23 rd June 2025.			
Improved staff engagement and morale	Staff Engagement Survey Two-Year Improvement Plan implemented	Implement the annual deliverables of the Staff Engagement Survey Two-Year Improvement Plan	Publish 3 Human Capital newsletters	Published 3 Human Capital newsletters	Target achieved.	Timeous planning.	None required.
			Implement the Peer Recognition Programme	Implemented the Peer Recognition Programme to recognise employees for living the organisation's values.	Target achieved.	Timeous planning.	None required.
Organisational design enabling optimal functioning of the entity	Reviewed organisational design implemented	Review the operating model for the entity	Review the operating model for optimal functioning of the entity	Reviewed the operating model for optimal functioning of the entity through a structural optimisation process.	Target achieved.	Internal collaboration.	None required.
Track productivity to enable a high performance culture	Productivity Matrix established	Establish the baseline for the Productivity Matrix	Develop the Productivity Matrix to determine the productivity measures that will be assessed	Developed the Productivity Matrix to determine the productivity measures that will be assessed within SA Tourism.	Target achieved.	Internal collaboration.	None required.

3.5.2 Programme 2: Business Enablement

OUTPUT	OUTPUT INDICATORS	2025/26 ANNUAL TARGET	QUARTERLY TARGETS				
			Quarter 1 Planned Performance Apr - Jun 2025	Quarter 1 Actual Performance Apr - Jun 2025	Variance	Reasons for Deviation / Attributes for Success	Corrective Measure/s
Tourism information tracking to monitor arrivals, spend, and brand performance	Number of tourism information tracking surveys conducted	Conduct 3 tourism information tracking surveys	Produce the Departure Survey Fieldwork Report	Departure Survey Fieldwork Report produced	Target achieved.	Successful project management.	None required.
			Produce the Domestic Tourism Survey Fieldwork Report	Domestic Survey Fieldwork Report produced	Target achieved.	Successful project management.	None required.
Assessment of tourist perceptions of South Africa as a destination	Sentiment Index established	Establish the Sentiment Index baseline	Develop the framework for the Sentiment Index	Developed the framework for the Sentiment Index	Target achieved.	Successful project management.	None required.

OUTPUT	OUTPUT INDICATORS	2025/26 ANNUAL TARGET	QUARTERLY TARGETS				
			Quarter 1 Planned Performance Apr - Jun 2025	Quarter 1 Actual Performance Apr - Jun 2025	Variance	Reasons for Deviation / Attributes for Success	Corrective Measure/s
Enhanced public and private sector collaboration on tourism	Number of stakeholder engagement activities implemented	Implement stakeholder engagement activities 16	Convene strategic dialogue with tourism sector role-players	A strategic dialogue with tourism sector role-players was convened on 30 th June 2025 focusing on preparations for the TBCSA Leadership Conference, scheduled for 17 th to 19 th September 2025.	Target achieved.	Timeous planning.	None required.
			Recognise stakeholder contributions to achievements in the tourism sector	The Johannesburg Expo Centre was recognised as the first entity that was graded. This recognition was published in the Tourism Tuesday Newsletter on 4 th June 2025.	Target achieved.	Internal collaboration.	None required.
			Implement the MOU with the Tourism Business Council of South Africa	Engagements were convened between TBCSA and SA Tourism on 25 th April and 20 th June 2025 to define ways of working and areas of collaboration, guided by the MOU. In addition, the TOMSA levy collectors list was shared with SA Tourism in relation to discounts for ATI.	Target achieved.	Collaboration with TBCSA.	None required.
			Conduct CEOs Forum with Provincial Tourism Authorities	The CEOs Forum with Provincial Tourism Authorities was held on 30 th June 2025 focusing on tourism transformation. Quarter 2 plans were also discussed including provincial visits and a joint planning session.	Target achieved.	Collaboration with Provincial Tourism Authorities and the Tourism Transformation Council of South Africa.	None required.
			Participate in engagements with Department of Tourism	Participated in six engagements with the Department of Tourism.	Target achieved.	Collaboration with Provincial Tourism the Department of Tourism.	None required.
Enhanced visitor experience through digital platforms	Number of digital platforms implemented	Implement one digital platform	Develop the phased approach for the development of the	Developed the phased approach for the development of the traveller application digital	Target not achieved.	The phased approach was not submitted to ExCo	The submission on the phased approach to ExCo

OUTPUT	OUTPUT INDICATORS	2025/26 ANNUAL TARGET	QUARTERLY TARGETS				
			Quarter 1 Planned Performance Apr - Jun 2025	Quarter 1 Actual Performance Apr - Jun 2025	Variance	Reasons for Deviation / Attributes for Success	Corrective Measure/s
			traveller application digital platform for approval	platform for approval, however, this approach was not approved.		on time due to an oversight within the responsible business unit, which affected timely submission for approval.	for approval has been finalised and will be tabled at the next ExCo. To prevent a recurrence, a strengthened internal timeline management system has been implemented within the responsible business unit, including earlier review checkpoints by the Executive Manager and stricter adherence to governance processes. Consequence management will also be effected in relation to the under-performance.
			Develop the technical specifications for Phase 1 of the traveller application digital platform	Developed the technical specifications for Phase 1 of the traveller application digital platform, where detailed business requirements were captured.	Target achieved.	Internal collaboration and project management.	None required.

3.5.3 Programme 3: Leisure Tourism Marketing

OUTPUT	OUTPUT INDICATORS	2025/26 ANNUAL TARGET	QUARTERLY TARGETS				
			Quarter 1 Planned Performance Apr - Jun 2025	Quarter 1 Actual Performance Apr - Jun 2025	Variance	Reasons for Deviation / Attributes for Success	Corrective Measure/s
Global Tourism Brand Campaign to create demand for South Africa as a premier tourist destination	Global Tourism Brand Campaign implemented	Implement the FY25/26 Global Tourism Brand Campaign Execution Plan	Develop and deploy the FY25/26 Global Tourism Brand Campaign toolkit	Developed and deployed the FY25/26 Global Tourism Brand Campaign toolkit. The approved toolkit is designed to guide and enable in-market implementation in alignment with the core messaging and visual identity of the campaign.	Target achieved.	Internal and external collaboration.	None required.
			Implement a Global Tourism Brand campaign activity at Africa's Travel Indaba	Implemented a Global Tourism Brand campaign activity at Africa's Travel Indaba, for immersive, interactive experiences at the Brand Village where ATI delegates were invited to reconnect with African hospitality. The activation at ATI positioned SA Tourism as a driving force in promoting tourism development, economic participation and brand awareness. This initiative was aimed to enhance brand visibility, showcase the country's diverse travel offerings, and stimulate economic opportunities, particular for SMMEs and tourism entrepreneurs.	Target achieved.	Internal and external collaboration.	None required.
Integrated digital marketing to increase brand visibility for destination South Africa	Integrated Digital Marketing Strategy implemented	Implement the FY25/26 Integrated Digital Marketing Strategy	Establish baseline for performance of social media platforms	Established baseline for performance of social media platforms	Target achieved.	Internal collaboration.	None required.

OUTPUT	OUTPUT INDICATORS	2025/26 ANNUAL TARGET	QUARTERLY TARGETS				
			Quarter 1 Planned Performance Apr - Jun 2025	Quarter 1 Actual Performance Apr - Jun 2025	Variance	Reasons for Deviation / Attributes for Success	Corrective Measure/s
Destination South Africa profiled through strategic events	Number of communication activities to profile destination South Africa through strategic events implemented	Implement 4 communication activities to profile destination South Africa through strategic events	Implement 1 communication activity to profile destination South Africa at Africa's Travel Indaba	Implemented 1 communication activity to profile destination South Africa at Africa's Travel Indaba, through a partnership with CNBC Africa to host the Township and Rural Tourism panel discussion.	Target achieved.	Internal collaboration.	None required.
Global public relations and communications to strengthen the destination brand	Number of global public relations and communications activities to strengthen the destination brand implemented	Implement 36 global public relations and communications activities to strengthen the destination brand	Implement 9 global public relations and communications activities to strengthen the destination brand	Implemented 14 global public relations and communications activities to strengthen the destination brand.	Target exceeded.	Opportunities were leveraged in partnership with the greater tourism industry in showcasing destination South Africa.	None required.
Leisure tourism campaigns to increase demand in South Africa	Number of domestic leisure tourism campaigns executed	Execute 3 domestic leisure tourism campaigns	Develop and approve the annual domestic leisure tourism implementation plan	Developed and approved the annual domestic leisure tourism implementation plan.	Target achieved.	Timeous planning.	None required.
Brand affinity to increase conversion in South Africa	Number of distribution channel initiatives in the domestic market implemented	Implement 16 distribution channel initiatives in the domestic market	Implement 4 distribution channel initiatives in the domestic market	Implemented 5 distribution channel initiatives in the domestic market	Target exceeded.	Collaborations with PTAs and non-traditional partners.	None required
Localised marketing campaigns to increase demand in the Africa region	Number of localised marketing campaigns in the Africa region executed	Execute 4 localised marketing campaigns in the Africa region	Develop and approve the annual localised marketing campaign implementation plan for the Africa region	Developed and approved the annual localised marketing campaign implementation plan for the Africa region	Target achieved.	Advance planning.	None required.
Brand affinity to increase conversion in the Africa region	Number of distribution channel initiatives in the Africa region implemented	Implement 26 distribution channel initiatives in the Africa region	Implement 4 distribution channel initiatives in the Africa region	Implemented 4 distribution channel initiatives in the Africa region.	Target achieved.	Timeous planning and leveraging stakeholder platforms.	None required.
Localised marketing campaigns to increase	Number of localised marketing campaigns in	Execute 4 localised marketing campaigns in the Europe region	Develop and approve 4 annual localised marketing campaign	Developed and approved 4 annual localised marketing	Target achieved.	Advance planning.	None required.

OUTPUT	OUTPUT INDICATORS	2025/26 ANNUAL TARGET	QUARTERLY TARGETS				
			Quarter 1 Planned Performance Apr - Jun 2025	Quarter 1 Actual Performance Apr - Jun 2025	Variance	Reasons for Deviation / Attributes for Success	Corrective Measure/s
demand in the Europe region	the Europe region executed		plans for the Europe region	campaign plans for the Europe region			
Brand affinity to increase conversion in the Europe region	Number of distribution channel initiatives in the Europe region implemented	Implement 36 distribution channel initiatives in the Europe region	Implement 12 distribution channel initiatives in the Europe region	Implemented 32 distribution channel initiatives in the Europe region	Target exceeded.	Leveraged ATI platform and post ATI tours.	None required.
Localised marketing campaigns to increase demand in the Americas region	Number of localised marketing campaigns in the Americas region executed	Execute 2 localised marketing campaigns in the Americas region	Develop and approve 2 annual localised marketing campaign implementation plans for the Americas region	Developed and approved 2 annual localised marketing campaign implementation plans for the Americas region.	Target achieved.	Timeous planning.	None required.
Brand affinity to increase conversion in the Americas region	Number of distribution channel initiatives in the Americas region implemented	Implement 12 distribution channel initiatives in the Americas region	Implement 3 distribution channel initiatives in the Americas region	Implemented 8 distribution channel initiatives in the Americas region.	Target exceeded.	Effective stakeholder management.	None required.
Localised marketing campaigns to increase demand in the Asia Australasia region	Number of localised marketing campaigns in the Asia Australasia region executed	Execute 4 localised marketing campaigns in the Asia Australasia region	Develop and approve 4 annual localised marketing campaign implementation plans for the Asia Australasia region	Developed and approved 4 annual localised marketing campaign implementation plans for the Asia Australasia region.	Target achieved.	Timeous planning.	None required.
Brand affinity to increase conversion in the Asia Australasia region	Number of distribution channel initiatives in the Asia Australasia region implemented	Implement 16 distribution channel initiatives in the Asia Australasia region	Implement 4 distribution channel initiatives in the Asia Australasia region	Implemented 11 distribution channel initiatives in the Asia Australasia region	Target exceeded.	Effective stakeholder management.	None required.
Localised marketing campaigns to increase demand in the Embassy Support markets	Number of localised marketing campaigns in the Embassy Support markets executed	Execute 1 localised marketing campaign in the Embassy Support markets	Develop and approve the annual localised marketing campaign implementation plan for the Embassy Support markets	Developed and approved the annual localised marketing campaign implementation plan for the Embassy Support markets.	Target achieved.	Timeous planning.	None required.
Brand affinity to increase conversion in the Embassy Support markets	Number of distribution channel initiatives in the Embassy Support markets implemented	Implement 16 distribution channel initiatives in the Embassy Support markets	Implement 4 distribution channel initiatives in the Embassy Support markets	Implemented 4 distribution channel initiatives in the Embassy Support markets	Target achieved.	Timeous planning.	None required.

OUTPUT	OUTPUT INDICATORS	2025/26 ANNUAL TARGET	QUARTERLY TARGETS				
			Quarter 1 Planned Performance Apr - Jun 2025	Quarter 1 Actual Performance Apr - Jun 2025	Variance	Reasons for Deviation / Attributes for Success	Corrective Measure/s
		Embassy Support markets					

3.5.4 Programme 4: Business Events

OUTPUT	OUTPUT INDICATORS	2025/26 ANNUAL TARGET	QUARTERLY TARGETS				
			Quarter 1 Planned Performance Apr - Jun 2025	Quarter 1 Actual Performance Apr - Jun 2025	Variance	Reasons for Deviation / Attributes for Success	Corrective Measure/s
Increased economic benefits and job creation through bidding and hosting of events	Meetings Africa hosted	Host Meetings Africa 2026	Conduct the economic impact briefing for Meetings Africa 2025	The economic impact briefing for Meetings Africa 2025 was conducted.	Target achieved.	Internal collaboration.	None required.
	Africa's Travel Indaba hosted	Host Africa's Travel Indaba 2025	Host Africa's Travel Indaba 2025	Africa's Travel Indaba 2025 was hosted from 13 th to 15 th May 2025, preceded by BonDay on 12 th May 2025. The event had 1 348 exhibitors, participating from 27 countries across the continent. an increase of 6.0% from the prior year. Overall attendance increased by 7.7% with 9 990 total attendees.	Target achieved.	Industry collaboration.	None required.
	Number of bid submissions for the MICE industry supported	Support 105 bid submissions for the MICE industry	Support 40 bid submissions for the MICE industry	Supported 41 bid submissions for the MICE industry.	Target exceeded.	Increased sales activities and successful academic workshops.	None required.
	Number of business events hosted in VTSDs	Host 10 business events in VTSDs	Host 3 business events in VTSDs	Hosted 3 business events in VTSDs as follows: Public Health Association of South Africa Conference held from 6 th to 9 th April 2025 in Rawsonville, Western Cape; the South African Institute of Agricultural Engineers (SAIAE) Two-Day Packhouse Conference	Target achieved.	Industry collaboration.	None required.

OUTPUT	OUTPUT INDICATORS	2025/26 ANNUAL TARGET	QUARTERLY TARGETS				
			Quarter 1 Planned Performance Apr - Jun 2025	Quarter 1 Actual Performance Apr - Jun 2025	Variance	Reasons for Deviation / Attributes for Success	Corrective Measure/s
				and CPD Event held from 26 th to 27 th June 2025 in Malelane, Mpumalanga; and the Digital Transformation in Mining Conference held from 25 th to 26 th June 2025, in Muldersdrift, Gauteng.			
Promotion of South African tourism products at global platforms	Number of South African tourism products promoted at global market access platforms	180 South African tourism products promoted at global market access platforms	40 South African tourism products promoted at global market access platforms	42 South African tourism products were promoted at global market access platforms: 20 products were promoted at the Arabian Travel Market, hosted from 28 th April to 1 st May 2025; and 22 products were promoted at IMEX Frankfurt from 20 th to 22 nd May 2025.	Target exceeded.	Strengthened industry partnerships.	None required.
B2B Campaign to create demand for South Africa as a premier business events destination	Number of B2B brand campaigns to create demand for South Africa as a premier business events destination executed	Execute 1 domestic B2B brand campaign	Develop and approve the domestic B2B brand campaign	The domestic B2B brand campaign was developed and approved.	Target achieved.	Internal collaboration.	None required.
		Execute 1 global B2B brand campaign	Develop and approve the global B2B brand campaign	The global B2B brand campaign was developed and approved.	Target achieved.	Internal collaboration.	None required.

3.5.5 Programme 5: Tourist Experience

OUTPUT	OUTPUT INDICATORS	2025/26 ANNUAL TARGET	QUARTERLY TARGETS				
			Quarter 1 Planned Performance Apr - Jun 2025	Quarter 1 Actual Performance Apr - Jun 2025	Variance	Reasons for Deviation / Attributes for Success	Corrective Measure/s
Enhanced visitor experience through quality assurance of tourism establishments	Number of graded establishments	4 500 graded establishments	1 125 graded establishments	4 447 graded establishments	Target exceeded.	A high number of already active establishments graded by March 2025 continued their grading status into Quarter 1.	None required.

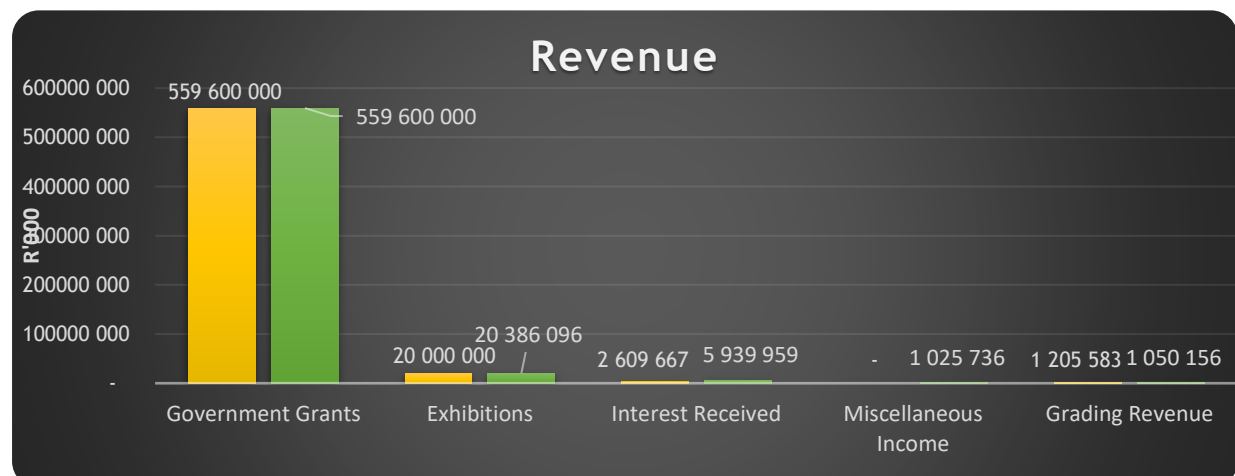
OUTPUT	OUTPUT INDICATORS	2025/26 ANNUAL TARGET	QUARTERLY TARGETS				
			Quarter 1 Planned Performance Apr - Jun 2025	Quarter 1 Actual Performance Apr - Jun 2025	Variance	Reasons for Deviation / Attributes for Success	Corrective Measure/s
Product development and job creation through basic quality verification	Basic Quality Verification (BQV) Programme implemented	Complete the BQV Programme in Gauteng	Implement the BQV Programme in Gauteng	The BQV Programme was implemented in Gauteng. The BQV evaluators conducted assessment evaluations across several areas, including Pretoria, Soshanguve, Ga-Rankuwa, Mamelodi and Atteridgeville. The Provincial Quality Assurance Specialists commenced with pre-screening of the properties that were evaluated.	Target achieved.	Adequate planning and co-ordination.	None required.
Promotion of increased air access for destination South Africa	Number of initiatives to support air access through the Tourism Route Development Marketing Plan implemented	Implement 4 initiatives to support air access through the Tourism Route Development Marketing Plan	Implement 1 initiative to support air access through the Tourism Route Development Marketing Plan	Implemented 1 initiative to support air access through the Tourism Route Development Marketing Plan, namely the Africa's Travel Indaba Air Pavillion.	Target achieved.	Adequate planning and co-ordination.	None required.

4. Financial Performance Report

4.1 Financial Performance for the period ending 30th June 2025

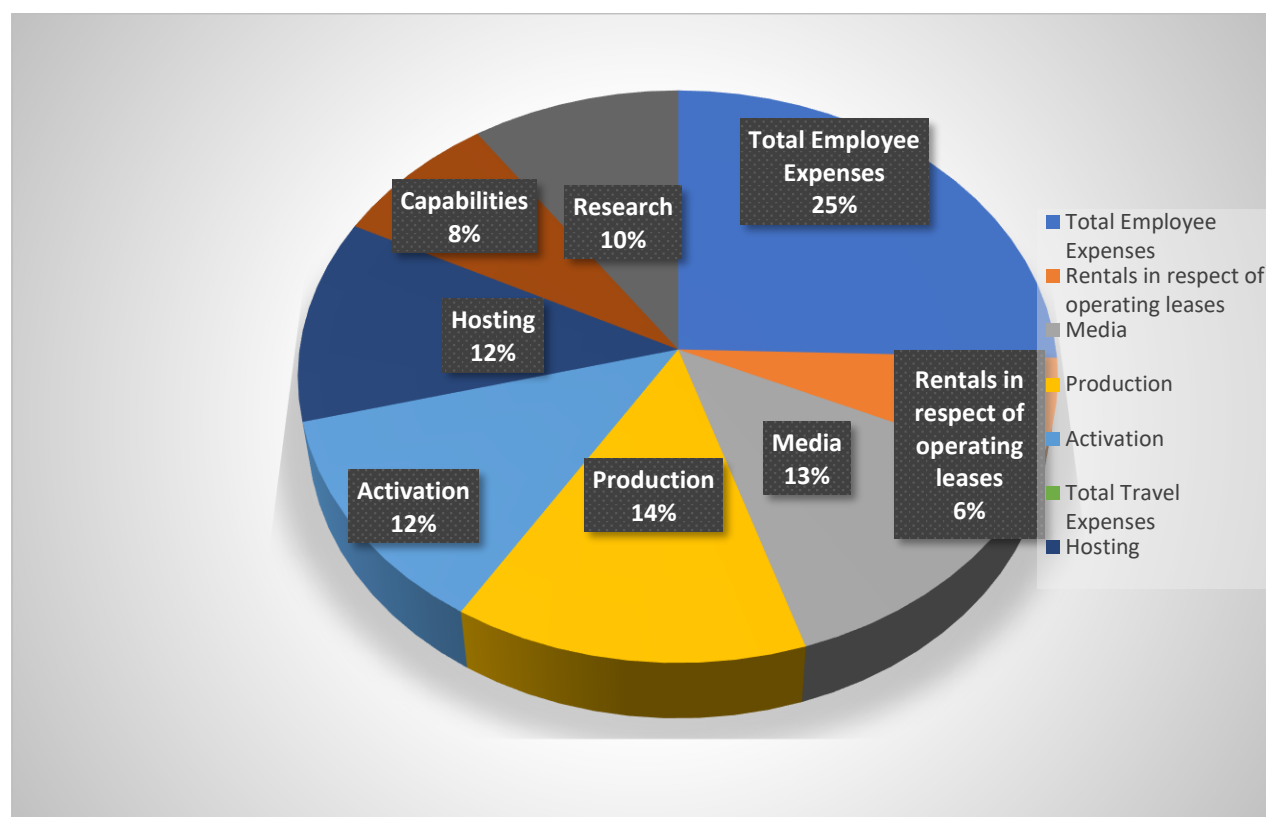
		CONSOLIDATED SUMMARY				
ACCOUNT DESCRIPTION		YEAR-TO-DATE				ANNUAL BUDGET REMAINING
	ANNUAL BUDGET	BUDGET	ACTUAL	ENCUMBRANCES	BUDGET REMAINING	
	Adj-26	Jun-25				
Revenue	-1 523 863 000	-583 415 250	-588 001 947	-	4 586 697	-935 861 053
Government Grants	-1 300 207 000	-559 600 000	-559 600 000	-	-	-740 607 000
Other Grants	-140 221 000	-	-	-	-	-140 221 000
Exhibitions	-37 652 000	-20 000 000	-20 386 096	-	386 096	-17 265 904
Interest Received	-31 316 000	-2 609 667	-5 939 959	-	3 330 292	-25 376 041
Miscellaneous Income	-	-	-1 025 736	-	1 025 736	1 025 736
Grading Revenue	-14 467 000	-1 205 583	-1 050 156	-	-155 427	-13 416 844
EXPENSES						
Overhead Cost	416 835 436	103 182 155	179 337 401	35 391 703	-111 546 949	202 106 332
Total Employee Expenses	275 245 626	65 509 333	51 071 279	236 065	14 201 989	223 938 282
General and Administrative Expenses	59 502 925	15 243 959	8 218 055	7 091 864	-65 960	44 193 006
Transactions due to Foreign Exchange Fluctuations	-	-	69 726 292	-0	-69 726 292	-69 726 292
State Grant - (Inter branch)	-	-	32 046 276	-	-32 046 276	-32 046 276
Rentals in respect of operating leases	22 380 662	5 948 183	5 787 837	6 848 639	-6 688 294	9 744 186
Maintenance, Repairs and Running cost	10 064 238	3 104 233	2 473 966	2 937 061	-2 306 794	4 653 211
Fuel and Motor Vehicle Expenses	898 515	135 002	8 116	250 000	-123 115	640 399
Consultants, Contractors and Special Services	28 921 176	8 378 485	3 458 742	16 199 148	-11 279 406	9 263 285
Legal Fees	3 862 580	1 188 148	110 429	758 772	318 947	2 993 380
Audit Fees	8 666 802	2 208 470	2 156 577	781 704	-729 812	5 728 520
Depreciation	-	-	3 342 879	-	-3 342 879	-3 342 879
Support Activation	2 782 610	414 850	280 588	257 616	-123 354	2 244 406
Support Travel Cost	4 510 303	1 051 494	656 363	30 834	364 297	3 823 106
Marketing Cost	1 102 027 613	285 159 303	74 046 135	64 810 168	146 303 000	966 223 615
Media	247 347 192	33 872 703	11 432 487	15 374 468	7 065 747	223 592 542
Production	236 946 840	85 203 945	14 986 074	12 789 434	57 428 438	209 171 332
Activation	256 991 175	83 331 432	15 764 628	8 714 758	58 852 045	232 511 788
Total Travel Expenses	36 479 187	14 327 637	816 193	529 083	12 982 360	35 133 910
Hosting	104 884 532	32 286 514	19 985 602	3 175 021	9 125 890	81 723 908
Capabilities	154 281 676	25 837 073	5 995 302	9 743 214	10 098 558	138 543 160
Research	65 097 011	10 300 000	5 065 848	14 484 190	-9 250 038	45 546 973
TOTAL EXPENSES	1 518 863 049	388 341 458	253 383 536	100 201 871	34 756 051	1 165 277 642
Capital Expenditure	5 000 000	1 500 000	1 467 143	-	32 857	3 532 857
NET (PROFIT) / LOSS BEFORE ENCUMBRANCES			-334 618 411			
NET (PROFIT) / LOSS AFTER ENCUMBRANCES			-234 416 540			

4.2 Revenue



- Revenue received this quarter amounts to R588 million, arising from departmental allocations (R559 million), exhibition income, investment income, and Grading revenue.
- Budgeted grants include TOMSA levies, of which no confirmation of income has been received in the quarter.
- R5.9 million in interest was received this quarter due to favourable or higher bank balances,
- Grading revenue received in the fourth quarter amounts to R1 million.
- In the current quarter, R20.3 million was received in respect of participation fees for exhibitions, including revenue for the Africa Travel Indaba.

4.3 Expenditure



Total expenditure, including commitments, in the current quarter amounts to R354 million.

- Marketing activities account for 39% (R139 million) of the expenditure to date, with overhead costs at 61%.
- Employee expenditure, which is 15% of the actual expenditure, is underspent at R14 million due to vacancies that were only filled at the end of the quarter. Encumbrances included relate to other salary-related costs.
- Overhead costs, including foreign exchange losses, depreciation, and rental costs, amount to R214 million and have been overspent by R111 million this quarter. This is mainly due to higher foreign exchange losses from the revaluation of balance sheet items.
- The marketing costs budget has not been utilised as expected this quarter, with an expenditure of R146 million under the year-to-date budget. The underspending is primarily due to delays in the approval of performance; however, spending improved towards the latter part of the quarter, and the budget is expected to be utilised in the upcoming quarter.

4.4 Financial Position as of 30th June 2025

South African Tourism has a positive solvency ratio, with total assets of R927 million exceeding total liabilities of R223 million. The entity also maintains a positive liquidity ratio, as total current assets of R855 million surpass current liabilities of R204 million. The current assets primarily consist of cash and cash equivalents and trade receivables due from stakeholders. The liabilities mainly comprise payables and long-term provisions.

Statement of Financial Position		
	30 June	31 March
	2025	2025
Assets		
Current Assets		
Trade and Other Receivables	39 266 093,45	30 118 315,00
Staff advances	68 726,66	71 701,00
Cash and Cash equivalents	815 502 404,29	555 046 790,00
	854 837 224,40	585 236 806,00
Non-Current Assets		
Property, plant and Equipment	66 533 205,71	68 977 912,00
Intangible assets	6 247 650,46	7 145 824,00
	72 780 856,17	76 123 736,00
Total Assets	927 618 080,57	661 360 542,00
NET Assets and Liabilities		
Current Liabilities		
Finance lease liability - current	-	(14 184 125,00)
Trade and other payables	(177 357 245,03)	(333 725 422,00)
Income received in advance	-	(20 033 000,00)
Provisions	(27 918 853,47)	(7 885 853,00)
	(205 276 098,50)	(375 828 400,00)
Non-Current Liabilities		
Finance lease liability - non current		-
Provisions	(18 175 000,00)	(18 175 000,00)
	(18 175 000,00)	(18 175 000,00)
Total Liabilities	(223 451 098,50)	(394 003 400,00)
Reserves		
Revaluation reserve	(50 656 971,59)	(50 681 978,00)
Accumulated Surplus	(653 510 010,48)	(216 675 164,00)
Total Net Assets	(704 166 982,07)	(267 357 142,00)
Total Net Assets and Liabilities	(927 618 080,57)	(661 360 542,00)

4.5 Total Assets

- a) South African Tourism's assets remain stronger, with the injection of the budget allocation in the first quarter, prior year accumulated surplus will be requested for retention.
- b) Receivables have increased due to ATI participation fees; collection measures will be implemented to ensure that revenue is recovered within time.
- c) Staff advances are primarily due to travel claims and have been kept minimal during the quarter.
- d) Non-current assets have decreased from the year-end balance due to the depreciation of existing assets.

4.6 Total Liabilities

- a) Trade payables have decreased by R156 million during the quarter due to the payment of accrued liabilities raised at year-end.
- b) Reserves and accumulated surpluses have remained high due to the current year's surplus, reflecting the organisation's positive financial health.

5. Governance and Board Matters

The South African Tourism Board is a Schedule 3A public entity established in terms of Section 9 of the Tourism Act No. 3 of 2014. In addition to the legislative requirements espoused by the Tourism Act, corporate governance within SA Tourism Board is applied through adherence to the provisions of the Public Finance Management Act No. 1 of 1999("PFMA"), the King IV Report on Corporate Governance for South Africa, 2016 ("King IV"), the Public Entity Governance Protocol entered into between the Minister of Tourism and the SA Tourism Board, as well as any other applicable law or regulation.

The Board considers good corporate governance to be an important instrument to enable the business to operate more efficiently, mitigate risks and safeguard stakeholders. Its approach to corporate governance is based on the appreciation that strategy, business model, performance and sustainable development are integral elements to creating value. The Board's governance function, therefore, supports the organisation's values and philosophies to achieve the targets that have been set for the organisation by the shareholder.

5.1 Board Meetings

During the period under review, attendance at the Board meetings was as follows:

Date of Meeting	Attendance	Key Agenda Items
23 April 2025	2/12 Only 2 Members were authorised to attend ATI Hosting	Africa Tourism Indaba Hosting Launch
30 April 2025 (Ordinary Q4 Meeting)	10/12	<ul style="list-style-type: none"> a) Q3 Performance Report b) Final draft APP c) Final Draft Five Year Strategic Plan 2025-2030 d) Prepayments on existing and new contracts e) Updated IA Charter f) Approval CFO Appointment g) CAE & CCBO Recruitment h) HC-REMCO Terms of Reference Approval i) MARCOM Terms of Reference Approval j) ARCO Terms of Reference Approval k) TGCSA Awards Committee Terms of Reference Approval l) ATI Venue Hire 2025 Approval
02 May 2025	10/12	The purpose of the meeting was to discuss the final forensic report on the investigation into transactions that led to material irregularity and transactions that are possibly fraudulent or duplication.
12 - 15 May 2025	2/12 Only 2 members were authorised attend ATI	Africa Tourism Indaba Hosting Event
30 May 2025 (Special Board Meeting)	8/11	<ul style="list-style-type: none"> (a) Approve the Annual Performance Report for the Financial Year 2024/25. (b) Approve the Draft 2024/25 Annual Financial Statements subject to management ensuring that the relevant supporting documents and schedules, inclusive of the written confirmation from WWP forms part of the Audit File that management will be submitting to the Auditor- General of South Africa with the approved Draft 2024/25 Annual Financial Statements; and further, that the necessary disclosure note regarding the Material Irregularity/fruitless and wasteful disclosure is accurately disclosed in the AFS.

5.2 Committee Meetings

During the period under review, attendance at Committee meetings were:

Committee	Date of Meeting	Attendance	Key Agenda Items
HUMAN CAPITAL & REMUNERATION COMMITTEE			
Human Capital & Remuneration Committee	14 April 2025 (Ordinary Q4 Meeting)	6/6	<ul style="list-style-type: none"> a) HC-REMCO Terms of Reference Review b) Grievance Policy and Procedure c) Employee Wellness Programme Policy d) Harassment Policy e) Quarter 4 Human Capital Report f) Business Planning Report g) Recruitment Report Update (CAE & CCBO) h) OD Implementation plan progress i) Staff engagement survey implementation plan progress Report j) Approval CFO Recruitment
MARKETING & COMMERCIAL COMMITTEE			
Marketing & Commercial Committee	24 April 2025 (Ordinary Q4 Meeting)	5/5	<ul style="list-style-type: none"> a) Digital marketing strategy b) MARCOM Terms of Reference Review c) Brand and Marketing Performance Q4 Report d) PR and COMMS Quarter 4 Report e) Digitech Q4 Report f) SANCB Q4 Performance Update g) Tourism Execution Q4 Performance Report h) Data Analytics and Strategic Insights Q4 Performance Report i) Africa Travel Indaba Update j) Global campaign launch and process k) Marcom SAT & Marcom TBCSA report

Committee	Date of Meeting	Attendance	Key Agenda Items
Marketing & Commercial Committee	25 April 2025 (TBCSA & SAT MARCOMS Engagement)	2/5	a) Global Brand Campaign b) Africa Travel Indaba Update
Marketing & Commercial Committee	20 June 2025 (TBCSA & SAT MARCOMS Engagement)	3/5	a) The focus of the meeting was to set clear, actionable plans for the partnership between TBCSA and SA Tourism. The meeting aimed to integrate work within the tourism sector and create a resolution register for oversight purpose.
AUDIT AND RISK COMMITTEE			
Audit and Risk Committee	15 April 2025 (Ordinary Q4 Meeting)	4/5	a) Q4 Organisational Performance Report b) ARCO Terms of Reference Review c) ICT Strategy d) ICT Q4 Report e) Preliminary Cyber Incident Report f) Updated IA Charter g) Internal Audit 3 year coverage/strategy h) Tender: Integrated marketing and Communication Agency for North America i) 2025/26 Annual Procurement Plan j) Delegation of Authority amendments k) ATI Venue hire 2025 (Host City) l) Prepayment Process Review and Prepayment lists
Audit and Risk Committee	27 & 29 May 2025 (Special Meeting)	7/8	a) Annual Financial Statements FY24/25 b) Annual Performance Report FY24/25
TGCSA AWARDS COMMITTEE			
TGCSA Awards Committee	22 April 2025	6/6	a) International Travel: Aviadev and Routes World b) TGCSA Awards Committee Terms of Reference c) Review Universal Accessibility Report d) Programme 5 report e) Dispensation report

5.3 Board & Committee Meeting Attendance

Attendance at the Board and Committee meetings during the reporting period is:

Name	14 Apr 2025	15 Apr 2025	22 Apr 2025	24 Apr 2025	30 Apr 2025	23 Apr 2025	25 Apr 2025	02 May 2025	12 May 2025	13 May 2025	14 May 2025	15 May 2025	27 May 2025	29 May 2025	30 May 2025	20 June 2025	Total Meetings
	Ordinary HC-REMCO Meeting	Ordinary ARCO Meeting	Ordinary TGCSA AWARDS Meeting	Ordinary MARCOM Meeting	Ordinary Board Meeting	ATI Launch	TBCSA and Marcom Meeting	Special Board Meeting	ATI	ATI	ATI	ATI	Special ARCO Meeting	Special ARCO Meeting	Special Board Meeting	TBCSA and Marcom Meeting	
Prof Gregory Davids					X	X	X	X	X	X	X				X		8
Maija de Rijk -Uys	X			X				X							X		4
Lawson Naidoo	X	X						X					X	X	X		6
Jonathan Gadihah			X		X			X						X			4
Ayanda Mazibuko			X	X	X			X									4
Rachel Nxele	X	X			X			X					X	X	X		7
Judi Nwokedi	X			X	X			X							X	X	6
Miller Matola		X	X		X			X					X	X	X		7
Tumelo Selikane			X	X	X			X								X	5
Ikaneng Pilane			X	X	X	X	X		X	X	X	X			X	X	11
Siza Mzimela	X	X			X			X									4
Ms Uveshnee Pillay	X		X		X										X		4

5.4 Board Remuneration and Travel Costs

The costs for the meetings held during Quarter 1 of FY2025/26 are:

Name	Remuneration	Travel and Accommodation	Car Hire/ Transfers	Total
Prof Gregory Davids	35 568	**** 8 701.39 ****8 631.39	****1 579.10	54 479.88
Maija de Rijk -Uys	10 792	0	0	10 792
Lawson Naidoo	16 188	0	0	16 188
Jonathan Gadiab	10 792	0	0	10 792
Ayanda Mazibuko	0	0	0	0
Rachel Nxele	18 886	0	0	18 886
Judi Nwokedi	16 188	0	0	16 188
Miller Matola	18 886	0	0	18 886
Tumelo Selikane	13 490	0	0	13 490
Ikaneng Pilane	29 678	****12 497.40 +1 596.00 ****15 713.40	****1 866	61 350.8
Siza Mzimela	10 792	0	0	10 792
*Uveshnee Pillay (Departmental representative)	0	0	0	0
Total				231 844.68

*Ms Pillay is not paid Board fees as she is a Departmental Representative.

** Former Chairperson of the Board.

*** Former Board member.

**** Quoted amounts

6. Annexure/s

The supporting document/s are attached as follows:

Annexure	Annexure Title
Annexure 1	Quarterly Compliance Report for Quarter 1: 1 st April 2025 to 30 th June 2025

Annexure 1

Quarterly Compliance Report for FY25/26 Quarter 1: 1st April 2025 to 30 June 2025

PFMA CHECKLIST FOR PUBLIC ENTITIES

Corporate Management							
No.	Section	Description	Action	Yes	No	N/A	Comments
1.	49	Accounting Authority	In terms of Section 49(3) the relevant treasury, in exceptional circumstances, may approve that a functionary other than the board or Chief Executive Officer be the Accounting Authority of the public entity. In this regard, has the Auditor-General been informed in writing of any such approval or instruction?			X	
2.	TR 27.3.1	Chief Financial Officer	In the case of a 3A or 3C public entity, has a chief financial officer been appointed to head the finance division?	X			The entity has appointed an Acting Chief Financial Officer.
3.	56(1)	Delegations of Authority	Have the powers entrusted or delegated to the Accounting Authority been delegated to other officials within the public entity?	X			The amended Delegation of Authority was approved by the Board on 30 October 2024.
4.	51(1)(a)(i)	Internal control	Does the public entity have an effective, efficient and transparent system of financial, risk management and internal control?		X		The entity does not have a Risk and Compliance Officer to assist with risk management. As a mitigating measure, an ERM Service Provider as appointed to assist with implementing the recommendations made from the risk maturity assessment that was conducted in June 2024, but not implemented due to the vacancy of the Risk and Compliance Officer. The recommendations include among others, awareness campaigns on risk management, review of the risk management policy and framework, incorporation of the risk appetite and tolerance levels in decision making, ensuring that there is a risk management plan in place, the filling of the position of risk and compliance officer, risk champions having to allocate sufficient time to risk management, ensuring that risk management is a standing agenda item in ARCO meetings, undertaking operational risk assessments, central storage of risk management documents, monitoring of risk activities

Corporate Management							
No.	Section	Description	Action	Yes	No	N/A	Comments
							at BU level once the Risk and Compliance Officer has been appointed, risk management KPI are in place for all staff at all levels in the organisation, key stakeholders to be involved in risk management, training to be included in the risk management policy, conduct a culture survey on an annual or biennial basis to determine improvement and build awareness and commitment. Most of the recommendations have been implemented. The risk maturity level of the organisation was at 2.4 in June 2024, the implementation of the recommendations will assist in improving risk management and also assist in improving the risk maturity level of the organisation going forward.
	51(1)(a)(ii)		Does the public entity have a system of internal audit under the control and direction of an audit committee complying with and operating in accordance with regulations and instructions prescribed in terms of Section 76?	X			SAT has an in-house internal audit function which report functionality to Audit and Risk Committee as required by the PFMA and National Treasury Regulations are applicable to the entity; and administratively to the CEO.
	TR 27.1.1		Is the audit committee a sub-committee of the Accounting Authority?	X			
	77(a)		Does the audit committee consist of at least 3 persons?	X			
	77(b)		Does the audit committee meet at least twice a year?	X			The Audit and Risk board sub-committee meets at least four (4) times a year on a quarterly basis.
	TR 27.1.6		Does the audit committee operate in terms of a written terms of reference?	X			Yes, the Terms of Reference for the Committee.
	TR 27.1.6		Are the terms of reference reviewed at least annually to ensure its relevance?	X			The Committee Terms of Reference were reviewed and approved 30 April 2024.
	TR 27.1.8		Does the audit committee review the following: <ul style="list-style-type: none"> • The effectiveness of internal control systems; • The effectiveness of internal audit; • The risk areas of the entity's operations to be covered in the scope of internal and external audits; • The adequacy, reliability and accuracy of financial information provided to management and other users of such information; 	X X X X			The ARCO requested since risk based audits are done, that operational and strategic risk assessments should be conducted.

Corporate Management							
No.	Section	Description	Action	Yes	No	N/A	Comments
			<ul style="list-style-type: none"> Any accounting and auditing concerns identified as a result of internal and external audits; The entity's compliance with legal and regulatory provisions; The activities of the internal audit function, including its annual work programme, co-ordination with the external auditors, the reports of significant investigations and the responses of management to specific recommendations; and Where relevant, the independence and objectivity of the external auditors. 	X X X			
	TR 27.1.10(a)		Does the audit committee report and make recommendations to the Accounting Authority?	X			
	TR 27.1.13		Does the audit committee meet annually with the Auditor-General or external auditors to ensure that there are no unresolved issues of concern?	X			SA Tourism's auditors have unrestricted access to the Chairperson of the Audit and Risk board sub-committee. Both the internal and external auditors are permanent invitees to quarterly Audit and Risk board sub-committee meetings. SA Tourism's auditors also have unrestricted access to the Audit and Risk sub-committee.
	TR 27.2.1		Are risk assessments conducted regularly to identify the public entity's emerging risks?	X			Operational risk assessments were conducted in Quarter 4 and Quarter 1.
	TR 27.2.5		Are the purpose, authority and responsibility of the internal audit function defined in an audit charter?	X			There is an Internal Audit Charter within Internal Audit which highlights the purpose, authority and responsibility of Internal Audit. The Charter is updated annually and approved by the ARCO and the Board.
	TR 27.2.6		Is internal audit conducted in accordance with standards set by the Institute of Internal Auditors?	X			Internal Audit conducts work and conduct in accordance with the global internal audit standards. The functions is reviewed every five years to ensure conformance with the standards.
	TR 27.2.7		Has the internal audit function prepared a three-year strategic internal audit plan based on the risks facing the public entity?	X			The internal audit function prepared a three-year strategic plan which was duly approved by the Audit and Risk board sub-committee.
			Does the internal audit function report to the audit committee detailing its performance against the Plan?	X			Internal Audit reports on a quarterly basis to the Audit and Risk board subcommittee meeting on the process against the coverage plan.

Corporate Management							
No.	Section	Description	Action	Yes	No	N/A	Comments
	TR 27.2.10		Does the internal audit function evaluate the following: <ul style="list-style-type: none"> The information systems environment; The reliability and integrity of financial and operational information; The effectiveness of operations; Safeguarding of assets; and Compliance with laws, regulations and controls 	X X X X X			This is done in line with the approved internal audit plan and applicable auditing standards.
5.	51(e)		Have effective and appropriate disciplinary steps been taken against any employee of the public entity who has: <ul style="list-style-type: none"> Contravened or failed to comply with a provision of the PFMA; Committed an act which undermined the financial management and internal control system of the public entity; or Made or permitted irregular or fruitless and wasteful expenditure 		X X X		
	86(2)		Has the Accounting Authority been found guilty of an offence or is there any investigation pending relating to the wilful or negligent failure to comply with the provisions of Sections 50, 51 or 55?		X		
	TR 33.1.1		Have any employees of the public entity committed financial misconduct?		X		
	TR 33.1.2		If so, was the investigation instituted within 30 days?			X	
	TR 33.2.1		Is the Executive Authority, Auditor-General and relevant treasury advised if any criminal charges that have been laid against persons for financial misconduct?			X	
	TR 33.3.1		Is the Executive Authority, Auditor-General and relevant treasury provided with a schedule detailing: <ul style="list-style-type: none"> The outcome of any disciplinary hearings and/or criminal charges; The names and ranks of employees involved; and The sanctions and any further action taken against these employees. 			X X X	There are no new cases registered in Q1. However, there are cases from previous quarter not yet resolved.

Corporate Management							
No.	Section	Description	Action	Yes	No	N/A	Comments
Planning & Budgeting							
No	Section	Description	Action	Yes	No	N/A	Comments
	52	Annual budget, corporate plan and shareholder's compact by <u>Schedule 2 public entities</u> and government business enterprises	Did the Accounting Authority submit the following to the relevant treasury and to the accounting officer of the department at least one month before the start of the public entity's financial year: <ul style="list-style-type: none"> a projection of revenue, expenditure and borrowings for the financial year in the prescribed format; and a corporate plan in the prescribed format covering the affairs of that public entity or business enterprise for the following three financial years. 			X X	SA Tourism is a schedule 3A public entity; therefore, this is not applicable to SA Tourism.
	TR 29.1.1		Does the corporate plan include the following: strategic objectives and outcomes identified and agreed upon by the Executive Authority in the shareholder's compact; <ul style="list-style-type: none"> strategic and business initiatives as embodied in business function strategies; key performance measures and indicators for assessing the entity's performance in delivering the desired outcomes and objectives; a risk management plan; a fraud prevention plan; a materiality/significant framework referred to in Treasury Regulation 28.1.5; a financial plan addressing: <ul style="list-style-type: none"> revenue, expenditure and borrowings; asset and liability management cash flow projections; capital expenditure programmes; and dividend policies 			X X X X X X	SA Tourism is a schedule 3A public entity; therefore, this is not applicable to SA Tourism.
	TR 29.2		Does the public entity conclude a shareholder's compact with the Executive Authority on an annual basis? If yes, does the shareholders compact document the mandated key performance measures and indicators to be attained as agreed between the Accounting Authority and the Executive Authority?			X	SA Tourism is a schedule 3A public entity therefore this is not applicable to SA Tourism.

Corporate Management							
No.	Section	Description	Action	Yes	No	N/A	Comments
2.	53(1)	Annual budgets by non-business Schedule 3 public entities	Did the Accounting Authority submit a budget to the Executive Authority for his or her approval at least six months prior to the start of the financial year of the department designated by the Executive Authority?	X			
	53(2)		Was the budget submitted to the Executive Authority via the Accounting Officer of the department designated by the Executive Authority?	X			
	53(3)		Did the public entity budget for a deficit or accumulate a surplus without approval of the National Treasury		X		
	TR 30.1.1		Did the Accounting Authority submit a proposed strategic plan to the Executive Authority for his or her approval at least six months before the start of the financial year of the department designated by the Executive Authority?	X			
	TR 30.1.2		Was the final strategic plan submitted to the Executive Authority before 1 April 2019	X			
	TR 30.1.3		Does the strategic plan: <ul style="list-style-type: none"> cover a period of at least three years; include objectives and outcomes as identified by the Executive Authority; include multi-year projections of revenue and expenditure; include performance measures and indicators for assessing the public entity's performance in delivering the desired outcomes and objectives; and include the materiality/significant <ul style="list-style-type: none"> framework, referred to in Treasury Regulation 28.3.1. Is the strategic plan updated on an annual basis?	X X X X X X X			

Management of Working Capital							
No.	Section	Description	Action	Yes	No	N/A	Comments
1.	38(1)(j)		Has the public entity submitted a written assurance to the transferring department to the effect that the entity has and maintains	X			

Management of Working Capital							
No.	Section	Description	Action	Yes	No	N/A	Comments
			effective, efficient, transparent financial management and internal control systems?				
	51(1)		<p>Does the public entity:</p> <ul style="list-style-type: none"> • have an appropriate procurement and provisioning administration system, which is fair, equitable, transparent, competitive and cost-effective? • have a system for properly evaluating all major capital projects prior to a final decision on the project? • collect all revenue due? • Have mechanisms in place to prevent irregular and fruitless and wasteful expenditure? • Manage available working capital efficiently and economically? 	<p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p>			
	TR 29.1.3 TR 29.1.6		<p>Did the public entity submit a corporate plan and borrowing programme to the relevant treasury? (Schedule 2, 3B and 3D entities only)</p> <p>If a borrowing programme was submitted, did it include?</p> <ul style="list-style-type: none"> • The terms and conditions on which the money was borrowed? • Information on proposed domestic borrowing; • Information on proposed foreign borrowing (national entities); • Short- and long-term borrowing; • Borrowing in relation to a pre-approved corporate plan; • The maturity profile of the debt; • The confirmation of compliance with existing and proposed loan covenants; • Debts guaranteed by the government; • Motivations for government guarantees, if required; and • The Executive Authority's approval of the borrowing programme, if required 			<p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p>	SA Tourism is a schedule 3A public entity therefore this is not applicable to SA Tourism.

Management of Working Capital							
No.	Section	Description	Action	Yes	No	N/A	Comments
			by the legislation in terms of which the entity was established.				
	TR 32.1.1		Did the public entity borrow money for bridging purposes? If yes: <ul style="list-style-type: none"> Was approval obtained from the Minister of Finance? Was the debt repaid within 30 days from the end of the financial year? 		X		

Reporting							
No	Section	Description	Action	Yes	No	N/A	Comments
1.	TR 26.1.1	Quarterly Reporting	Does the public entity submit information on its actual and projected revenue and expenditure to the designated accounting officer within 30 days from the end of each quarter? (Schedule 3A and 3C entities)	X			SA Tourism complies with the quarterly template as issued by National Treasury which includes budget versus actual analysis. The finance report, which includes actual and projected revenue and expenditure, is submitted within 30 days from the end of each quarter.
	TR 26.1.2		Does the public entity report quarterly to the Executive Authority (via the designated Accounting Officer) on the extent of compliance with the PFMA and Treasury Regulations? (Schedule 3A and 3C public entities)	X			
	TR 29.3.1 TR 30.2.1		Has the public entity established procedures to report quarterly to the Executive Authority in relation to progress made against achieving the targets set out in the strategic and corporate plan?	X			
2.	55	Annual report and financial statements	Did the public entity submit the following to the relevant treasury, Executive Authority and Auditor-General within 5 months from the end of the financial year: <ul style="list-style-type: none"> An annual report on the activities of the public entity during that financial year; 	X X X			

Reporting							
No	Section	Description	Action	Yes	No	N/A	Comments
			<ul style="list-style-type: none"> The financial statements for that financial year after the statements have been audited; The report of the auditors on those statements. Does the public entity's annual report and financial statements fairly present the state of affairs of the public entity, its business, its financial results, its performance against predetermined objectives and its financial position as at the end of the financial year concerned? Does the annual report and financial statements include: <ul style="list-style-type: none"> Any material losses through criminal conduct and any irregular expenditure and fruitless and wasteful expenditure that occurred during the financial year; Any criminal or disciplinary steps taken as a consequence of such losses or irregular expenditure or fruitless and wasteful expenditure; Any losses recovered or written off; Any financial assistance received from the state and commitments made by the state on its behalf; and The financial statements of subsidiaries. 	X X X X X X			
	65		Did the Executive Authority table the annual report and financial statements within one month after the Accounting Authority received the audit report?	X			

Reporting							
No	Section	Description	Action	Yes	No	N/A	Comments
			If no, did the Executive Authority table an explanation in the Legislature setting out the reasons why the annual report and financial statements were not tabled?				
	TR 27.1.7		Does the annual report contain a disclosure to the effect that the audit committee has adopted a formal terms of reference	X			
	TR 27.1.10		Did the audit committee comment on its evaluation of the public entity's financial statements?	X			Audit and Risk Committee commented on its evaluation of the public entity's financial statements in the Report of the Audit and Risk board sub-committee.
	TR 28.1.1		Do the financial statements include a report by the Accounting Authority that discloses the emoluments of all directors and executive members of the public entity and its subsidiaries?	X			
	TR 28.1.2		If yes, to above, does the disclosure include? <ul style="list-style-type: none"> Fees for services as a director or executive member; Basic salary; Bonuses and performance related payments; Sums paid by way of expense allowances; and Contributions made to any pension fund, medical aid, insurance scheme, etc.; 	X X X X X			
	TR 28.1.3		Has the public entity adjusted its financial year in accordance with the table in TR 28.1.3?		X		SA Tourism's financial year is consistent with prior years and no adjustments took place during the period under review.
	TR 28.2.1		Does the annual report provide details of the materiality /significant framework applied during the financial year?	X			

Cash management, Banking and Investment							
No.	Section	Description	Action	Yes	No	N/A	Comments
1.	51(1)(b)(iii) TR 31.1	Cash Management	<p>Are systems, procedures and processes in place in the public entity to ensure efficient and effective banking and cash management, which includes?</p> <ul style="list-style-type: none"> • Collecting and banking revenue promptly; • Making payment no earlier than necessary with due regard for efficient, effective and economical programme delivery and the public entity's normal terms for account payments; • Avoiding prepayments for goods and services unless required by the contractual arrangements with the supplier; • Accepting discounts to effect early settlement; • Pursuing debtors with appropriate sensitivity and rigor to ensure that amounts receivable by the public entity are collected and banked promptly; • Accurately forecasting the public entity's cash flow requirements; • Timing the in and out flow of cash; • Recognising the time value of money, i.e. economically, efficiently, and effectively managing cash; • Taking any other action that avoids locking up money unnecessarily and inefficiently, such as managing inventories to the optimum level for efficient and effective programme delivery, and selling surplus or under-utilised assets; • Performing bank reconciliations at least weekly; • Making regular cash forecasts; • Alignment of the approved budget with monthly cash flows; and • Variance analyses of actual cash flow with the approved budget. 	<p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p> <p>X</p>			
	TR 31.2.1	Banking	Does the public entity submit a list of all its banking accounts to the National Treasury by 31 May of each year?	X			The banking framework was submitted to National Treasury as required.
	TR 31.3.1 TR 31.3.2	Investment	<p>Does the public entity have an investment policy?</p> <p>If yes to the above, does the investment policy include the:</p> <ul style="list-style-type: none"> • selection of counterparties through credit risk analyses; 	<p>X</p> <p>X</p>			

Cash management, Banking and Investment							
No.	Section	Description	Action	Yes	No	N/A	Comments
			<ul style="list-style-type: none"> • establishment of investment limits per institution; • establishment of investment limits per investment instrument; • monitoring of investments against limits; • re-assessment of investment policies on a regular basis; • re-assessment of counter-party credit risk based on credit ratings; and • re-assessment of investment instruments based on liquidity requirements. 	X X X X X X			

Report ends