



SOUTH AFRICAN TOURISM

SOUTH AFRICAN TOURISM

ANNUAL PERFORMANCE PLAN 2025 – 2026

EXECUTIVE AUTHORITY STATEMENT

Tourism is a key contributor to South Africa's economic growth, with the potential to significantly reduce poverty and tackle inequality. At the start of the Seventh Administration and the Government of National Unity, South African Tourism is poised to do things differently and grow tourism. South African Tourism's Annual Performance Plan and Strategic Plan for 2025/26 is a blueprint for this growth.

The Tourism Growth Partnership Plan 2025-2030 shows that opportunity lies before us. It provides a unique and exciting five-year window to plan for a real tourism breakthrough collectively. The plan prioritises creating jobs and the development of industry-required skills and gives new impetus to increasing the number of international, regional, and domestic travellers. To this end, in addition to creating jobs, we all agree to actively collaborate with our industry to jointly market South Africa internationally, on the African continent, and here at home.

We are pleased with the progress already made in making it easier for tourists to apply for visas, but further technological advances are needed for us to compete internationally. There is an urgent need to remove friction in the licensing procedures for tour operators. The recent Cabinet approval of the Tourism Route Development Marketing Programme allows us to improve air connectivity to and in South Africa.

All travellers should feel safe visiting our country, and good roads, efficient and safe public transport, water and waste management, functioning communication networks, reliable electricity supply, and health infrastructure all contribute immensely to the ultimate experience of travellers, both domestic and international, about South Africa as a destination.

Well-maintained and resilient infrastructure also unlocks additional economic opportunities for local small and medium community-based businesses and encourages increased tourist spending and domestic travel.

The government and private sector must hold each other accountable to make measurable progress. This is, therefore, a clarion call for the government and private sector to partner meaningfully and concretely in driving impactful and transformative initiatives for these focus areas. The good news is that tourism is a growth sector, a sunrise sector with endless possibilities to uplift communities and ample learning and earning opportunities universally regarded as low-hanging fruit. Undoubtedly, there is still much runway left to improve the sector's performance, both domestically and internationally. We can build on our world-class tourism assets and solid foundation thus far laid, partner concretely and meaningfully, leverage each other's strengths and resources and unlock South Africa's full potential as an attractive tourist destination.

I am grateful to South African Tourism, its board, executive, and every hard-working team member for driving tourism, and I look forward to seeing renewed energy in the directive. I also thank all our stakeholders for their continued input and valuable insights; our industry ultimately makes tourism happen.

The sector's credibility and success rest on a seamless and coordinated approach to messaging, marketing, digitising processes, and overall collaboration. This will be weighed against the number of jobs created, downstream benefits to other service industries, and the impact and contribution to South Africa's overall economic growth and prosperity for all its people.

P. de Lille

Ms Patricia de Lille, MP
Minister for Tourism

ACCOUNTING AUTHORITY STATEMENT

I herewith on behalf of the South African Tourism Board present the South African Tourism 2025/26 Financial Year Annual Performance Plan (APP).

This past year our marketing strategy of South Africa globally and nationally as a destination of choice delivered positive results. To achieve afore we focus on good governance, accountability, ethical leadership, rebuilding organisational capabilities, and strengthening partnerships across the sector. The alignment of the organisation's strategy with the seventh administration priorities and global tourism trends, were key in the development of the 2025/26 APP. The appointment and retention of capable executive members have been instrumental in steering South African Tourism toward a sustainable recovery. South African Tourism is commitment to fulfilling its legislative mandate as enshrined in the Tourism Act of 2014 and delivering on the goals outlined in the Tourism Sector Master Plan and advancing tourism's critical role in South Africa's economic recovery and growth.

Over the past year, we have focused on driving growth while ensuring that the benefits of tourism are widely shared across society. Encouragingly, international tourist arrivals have continued to rise, supported by increased air travel capacity and bespoke targeted marketing initiatives. As we embark on the 2025/26 financial year, we will continue on our growth path and build on past gains and lessons learnt.

The 2025/26 Annual Performance Plan provides a roadmap for achieving our vision. Our focus will remain on increasing visitor arrivals, growing domestic tourism, diversifying tourism products, and improving overall stakeholder relations and reputation. These priorities will be guided by the Market Prioritisation and Investment Framework to ensure effective resource allocation and measurable outcomes.

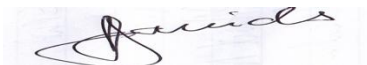
In the year ahead, we are anchored in our core mandate of increasing tourist arrivals and positioning South Africa as an attractive destination for both leisure and business travel. Our efforts will focus on leveraging digital marketing platforms and data-driven insights to inform strategies that address the evolving needs of both domestic and international travellers. At the same time, we will prioritise geographic spread to ensure that the benefits of tourism are shared across all nine provinces.

Our Board remains steadfast in fostering a culture of excellence and accountability within the organisation, ensuring that executive decisions reflect the vision of both the Board and the Shareholder. We will continue to work closely with the greater tourism sector to address challenges, unlock opportunities, and ensure tourism plays a meaningful role in the broader economic recovery of the country. This includes deepening collaboration with government, industry stakeholders, and local communities to create innovative solutions that enhance South Africa's competitiveness as a destination of choice.

We will continue to promote inclusivity by supporting tourism enterprises led by women, youth, and persons with disabilities. These initiatives are critical to ensuring that the tourism sector contributes meaningfully to reducing inequality, creating jobs, and driving sustainable economic growth.

In conclusion, I would like to express my gratitude to all stakeholders, including our executive leadership, industry partners, government authorities, and the broader tourism community, for their dedication and support over the past year. I also extend my heartfelt appreciation to the Minister of Tourism, Patricia de Lille, for her unwavering support and leadership.

The Board remains committed, and together, we will continue to make South Africa a destination of choice for all travellers.



Professor Gregory Davids
Chairperson
South African Tourism Board

ACCOUNTING OFFICER STATEMENT

As we present our 2025/26 Financial Year Annual Performance Plan, I am pleased to reaffirm our commitment to positioning South Africa as an attractive and appealing destination for both leisure and business events. Tourism continues to play a vital role in our economy, generating employment opportunities, driving regional development, and contributing significantly to our country's gross domestic product (GDP). As we navigate the dynamic global tourism landscape, we are confident that our strategic initiatives for the year ahead will position South Africa to thrive, ensuring we remain an inviting, innovative, and inclusive destination for the world to experience.

For South African Tourism, it is imperative that we remain agile, guided by research and insights to stay competitive and responsive to emerging trends. This annual performance plan sets the roadmap for the first year of implementing our strategic plan, focusing on key priorities that will drive measurable results. These include promoting the geographic spread of tourism to all provinces and strengthening transformation by supporting tourism enterprises owned by women, youth, and persons with disabilities. Through these efforts, we aim to drive economic inclusion, empower communities, and ensure that the benefits of tourism are widely shared.

As we continue rolling out targeted marketing campaigns across our international hubs and working collaboratively with partners, including the media and the tourism trade, we are confident in our ability to entice more travellers to explore South Africa. We will continue to showcase iconic attractions, such as the Kruger National Park, vibrant cities, and our idyllic coastline. At the same time, we will introduce travellers to lesser-known experiences, including township tours, cultural events, and hidden gems in rural and peri-urban areas. These efforts are central to ensuring a diversified tourism offering that reflects the richness and vibrancy of our country.

Domestic tourism remains a cornerstone of our strategy, providing a foundation for sustainable growth across the sector. We are encouraged by the number of South Africans travelling and enjoying their country. In 2025/26, we will strengthen efforts to encourage South Africans to explore their own country, focusing on lesser-visited provinces and promoting travel throughout the year, beyond traditional peak seasons, such as Easter and summer holidays.

Strategic global trade shows remain essential touchpoints, allowing us to connect with global markets, foster new partnerships, and showcase South Africa's diverse offerings. With our flagship trade shows - Meetings Africa and Africa's Travel Indaba - we continue to lead in promoting the best of our African continent while demonstrating our country's capacity to host outstanding events. We are committed to using the power of technology to enhance the value of these events for all stakeholders, ensuring they remain impactful and worthwhile.

As a destination marketing organisation, we will also continue to lead the greater tourism industry in participating in other global strategic events hosted in key markets. These platforms provide opportunities for networking, growth partnerships, and advocacy to attract both leisure and business travellers to our shores.

Over the past few years, we have seen a significant increase in direct flights between major global cities and South Africa, making our country more accessible to international travellers. As we venture into the 2025/26 financial year, we look forward to welcoming even more direct flights to South Africa. Improved accessibility is essential to sustaining growth and ensuring seamless travel experiences for visitors.

In 2024, South Africa commemorated 30 years of democracy and freedom, highlighting the resilience and vibrancy of our nation - qualities mirrored in our tourism experiences. As we head into 2025, we embrace this spirit while adapting to the ever-evolving global tourism landscape.

We welcome the government's continued commitment to easing barriers to travel, improving infrastructure, and addressing safety and security concerns. These actions are critical enablers of growth and essential to creating a favourable environment for our sector to thrive.

Driven by increased domestic, regional, and international arrivals, and government's commitment to further ease regulations to promote our sector, South Africa's tourism industry is well-positioned for growth. With 2024 demonstrating this momentum, there is renewed optimism for the sector's future.

The success of this annual plan will depend on the dedication of the South African Tourism team and the strong partnerships we have built with industry stakeholders. I would like to express my sincere gratitude to everyone who continues to collaborate with us in making a lasting impact on our country. With renewed optimism for the future of tourism, I look forward to a fruitful 2025/26 financial year.



Ms Nombulelo Guliwe

Chief Executive Officer

South African Tourism

OFFICIAL SIGN OFF

It is hereby certified that this Annual Performance Plan for financial year 2025/26:

- 1) Was developed by the Management of South African Tourism, under the guidance of the South African Tourism Board and the Minister of Tourism.
- 2) Takes into account the relevant policies, legislation, and other mandates for which South African Tourism is responsible.
- 3) Accurately reflects outcomes and outputs which South African Tourism will endeavour to achieve over the period.



Ms Bronwen Auret

Chief Quality Assurance Officer

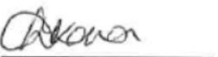
Date: 21/01/2025



Mr Siyabonga Mthethwa

Chief Strategy Officer

Date: 20/01/2025



Ms Yoland Kona

Head: Strategic Planning,
Evaluation, and Programme
Management

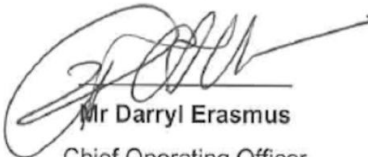
Date: 20/01/2025



Ms Thembisile Sehloho

Chief Marketing Officer

Date: 20/01/25



Mr Darryl Erasmus

Chief Operating Officer

Date: 20/1/25



Chief Convention Bureau Officer:

DOA

Date: 30.01.25



Mr Takalani Ramovha

Acting Chief Financial Officer

Date: 20/01/2025



Ms Nombulelo Guliwe

Chief Executive Officer

Date: 21, 01, 25

Approved by:



Professor Gregory Davids

Chairperson, South African Tourism Board
(Accounting Authority)

Date: 30/01/2025



Honourable Patricia de Lille, MP

Minister for Tourism
(Executive Authority)

Date: 3 April 2025

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PART A: OUR MANDATE

1. UPDATES TO THE RELEVANT LEGISLATIVE AND POLICY MANDATES

Updated Legislative Mandates

There are no updates to the legislative mandates presented in the South African Tourism Strategic Plan: 2025 - 2030, which reflects the following:

1) Constitutional mandate:

The **Constitution of the Republic of South Africa, 1996**, lays the foundation for the rights and obligations of all citizens and government structures. Key sections relevant to South African Tourism include:

- a) Section 22: The right to choose one's trade, underpinning equitable opportunities in the tourism sector.
- b) Section 24: The right to an environment that is not harmful and that supports sustainable tourism development.
- c) Section 41 and Part A of Schedule 4: Principles of cooperation between government spheres, noting tourism as a concurrent competence of national and provincial governments.

2) Legislation defining South African tourism's mandate:

- a) **Tourism Act (No. 3 of 2014)**: Establishes South African Tourism's role in promoting responsible tourism for the benefit of all; marketing South Africa as a domestic and international tourist destination; providing quality assurance to enhance competitiveness and maintain global standards; and supporting the development and promotion of business events tourism.
- b) **Public Finance Management Act (No. 1 of 1999, as amended) (PFMA)**: Lists South African Tourism as a Schedule 3A national public entity, subject to accountability to the Minister of Tourism and Parliament.
- c) **Intergovernmental Relations Framework Act (No. 13 of 2005)**: Provides a framework for cooperation across all government levels, ensuring interventions are localised and aligned with the 52 district and metropolitan spaces.

3) Legislation informing delivery of the core mandate:

- a) South African Tourism complies with all relevant national, provincial, and municipal regulations that regulate its functions and areas of operation.

Updated Policy Mandates

Policy mandates guiding South African Tourism over the 2025 to 2030 period include:

- 1) Global and regional policy alignment:
 - a) **United Nations 2030 Agenda for Sustainable Development:** Positions tourism as a key driver for sustainable economic growth, poverty reduction, and climate action.
 - b) **African Union Agenda 2063:** Envisions an integrated and prosperous Africa, with tourism fostering cultural heritage and regional development.
 - c) **Southern African Development Community Vision 2050 and Regional Indicative Strategic Development Plan 2020-2030:** Prioritises tourism for regional integration, economic diversification, and job creation.
- 2) National development framework:
 - a) **National Development Plan Vision 2030 (NDP):** Emphasises tourism's role in inclusive economic growth, employment, and social upliftment.
 - b) **Government of National Unity (GNU) Statement of Intent:** Post-election priorities focused on inclusive economic growth, social justice, investment in people, safety.
 - c) **Medium-Term Development Plan (MTDP) 2024-2029:** Bridges NDP's long-term goals with actionable interventions, positioning tourism as crucial for growth and poverty reduction. South African Tourism aligns with MTDP Priority 1 on inclusive growth and job creation, and indirectly with Priority 2 on reducing poverty and Priority 3 on building a capable state.
 - d) 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 eight priority interventions to drive the reconstruction and recovery of the South African economy, which includes support for tourism recovery and growth.
- 3) Sectoral policy alignment:
 - a) **White Paper on the Development and Promotion of Tourism (1996):** Provides a framework and guidelines for tourism development and promotion in South Africa. The White Paper 2024 was gazetted on 4 October 2024.
 - b) **Green Paper on the Development and Promotion of Tourism (2023):** Sets out an updated strategic direction for sustainable and inclusive tourism growth, focused on governance, safety, technology, crisis management, and transformation to enhance the sector's economic impact and resilience. It prioritises rural and peri-urban tourism, and responsible tourism practices, and aims to strengthen regulatory frameworks and promote sector transformation.
 - c) **National Tourism Sector Strategy (NTSS) 2016-2026:** Aims for a rapidly growing and inclusive tourism economy, focusing on ease of access, quality visitor experiences, and transformation.
 - d) **Tourism Sector Master Plan 2023:** Updates the NTSS, emphasising supply protection, demand stimulation, and capacity building for sustainable growth.
 - e) **Tourism Broad-Based Black Economic Empowerment Charter:** Seeks transformation within the sector, focusing on enterprise development, skills development, and socio-economic upliftment.

- f) **Tourism Grading Council of South Africa (TGCSA) Grading Criteria:** Implements quality standards to ensure visitor experiences meet global benchmarks and uphold South Africa's appeal as a tourism destination.

2. UPDATES TO INSTITUTIONAL POLICIES AND STRATEGIES

Key institutional policies and strategies guiding South African Tourism's focus for 2025 to 2030 include:

Minister's Delivery Agreement Commitments, 2024

In line with the Minister's Delivery Agreement signed with the President in 2023, South African Tourism will contribute towards the following priorities:

- Increase the volume and value of domestic and international tourism through the Tourism Recovery Plan.
- Enhance the enabling conditions for visitor experience.
- Support for existing businesses and growth of small, medium, and micro enterprises (SMMEs).

South African Tourism Long-Term Corporate Strategy, 2024

The South African Tourism Long-Term Corporate Strategy provides a 15-year roadmap (2025 to 2040) to position South Africa as a leading global destination. The strategy aligns with the NDP and key policy frameworks, and defines South African Tourism's vision to position the country as a leading global destination by:

- Elevating leisure and business events brand positioning through targeted marketing and strategic partnerships.
- Contributing to a sustainable and inclusive tourism value chain through quality improvements, innovation, and strategic partnerships.
- Enhancing industry credibility and organisational capability through stakeholder engagement and operational efficiency.

This 2025/26 Financial Year Annual Performance Plan represents the first operational phase of the long-term strategy. It prioritises foundational actions to strengthen South Africa's tourism brand, enhance visitor experiences, and drive inclusive growth while contributing to the organisation's 2040 vision.

South African Tourism Market Prioritisation and Investment Framework, 2024

A strategy for optimal marketing investment across priority markets, using metrics to assess market potential and allocate resources for sustainable tourism growth to 2030. It categorises markets into:

- 1) **Defend markets:** High existing share, focus on maintaining stability and growth.
- 2) **Growth markets:** Emerging markets with strong potential for increased South Africa's market share.

3) Watch-list markets: Monitored for medium- to long-term potential and strategic investments.

As part of our investment portfolio to drive arrivals & spend contribution aligned to MTDP objectives, SAT is focusing on key overseas markets for growth including BRICS+ markets (China, India, Russia, Brazil, UAE). The investment allocated is aligned on targets that will enable 2030 objectives.

- Considering the target of 15 million arrivals by 2030, South Africa's portfolio should include 25 markets, comprising of 8 Defend and 17 Growth markets. Additionally, we have watchlist markets which are strategic markets for portfolio diversification.



Enhancing a Whole-of-State Approach to Tourism, 2023

Despite South Africa's rich tourism offerings, the country has faced challenges in maintaining its global competitiveness. To address these challenges, the 5C's concept (collaboration, coordination, consistency, communication, and commitment) was introduced to guide efforts to enhance South Africa's brand and unify tourism messaging. This requires a concerted effort to ensure that stakeholder engagement, collaboration and partnerships across the public and private sectors are established and maintained.

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

Informed by the Corporate Strategy and giving effect to the legislative and policy mandate, South African Tourism's strategic focus, namely its vision, mission, and values, is as follows:

VISION

To inspire and attract local and global travellers to explore and experience the richness of South Africa and her people.

MISSION

Marketing South Africa domestically and internationally to increase the volume and value of both leisure and business travellers, while promoting quality and excellence across all tourism experiences.

The mission will be implemented through a focus on four strategic pillars aligned to the pathways of the long-term corporate strategy:

- Building and strengthening our tourism brand to increase market share and improve our competitive position.
- Leading the advancement, quality assurance and sustainable development of the sector, and improving visitor experience.
- Striving to become a trusted advisor and thought leader in the industry through mutually beneficial partnerships and delivering tourism intelligence.
- Building an organisation with the best culture, that attracts, develops and retains the best people, while optimally leveraging technology to deliver exceptional results.

VALUES

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 act with appreciation of diversity.
Authentic Caring	We show and act with genuine care to each other, customers, stakeholders, partners, suppliers and the business.
Responsibility	We take personal accountability for delivering work that exceeds customers' and stakeholders' expectations.
Excellence	We take pride in, and commit to, always meeting and exceeding our customers' and stakeholders' expectations with outstanding quality.

1. UPDATED SITUATIONAL ANALYSIS

1.1. EXTERNAL ENVIRONMENT ANALYSIS

Global Tourism Outlook

The global tourism sector is set for continued growth between 2025 and 2030, with international arrivals already reaching 96% of pre-pandemic levels in the first half of 2024. The recovery is particularly strong in regions like the Middle East, which saw a 26% increase in arrivals compared to 2019, while Europe and the Americas are nearly at pre-pandemic numbers. Asia and the Pacific have also shown improvement, reaching 82% of pre-pandemic levels by mid-year.

Tourism's economic impact is also recovering, with many countries seeing a significant rebound in tourism receipts, such as Albania, Serbia, and Saudi Arabia. The sector's contribution to global GDP reached an estimated USD 3.4 trillion in 2023, highlighting its importance to the global economy. This sets the stage for continued growth driven by increased international demand, sustainable tourism, and effective destination management. However, challenges like inflation in travel costs, staffing shortages, and geopolitical instability remain.

Global tourism is undergoing a rapid digital transformation with technologies, such as artificial intelligence, blockchain, and immersive platforms, reshaping visitor experiences. Resilience planning is also gaining prominence as the sector adapts to economic, environmental, and geopolitical challenges. These trends underscore the importance of aligning strategic planning with global imperatives like inclusive growth, environmental stewardship, and digital innovation.

Sustainability remains a cornerstone of global tourism trends. Travellers increasingly demand eco-conscious experiences, immersive cultural exchanges, and contributions to local communities. South Africa is well-positioned to leverage these global shifts, aligning its offerings with emerging traveller preferences while promoting economic inclusivity and environmental conservation.

Outlook for Tourism in South Africa

South Africa's tourism sector has been experiencing a strong recovery, aligning closely with broader trends observed across the African continent. International arrivals are nearing pre-pandemic levels, primarily driven by the resilience of regional markets. African land markets, including key neighbouring countries, have played a vital role in this recovery, contributing over 50% year-on-year growth in 2022 and 2023. This resurgence has been facilitated by the reopening of borders, renewed travel confidence, and a strong emphasis on promoting regional tourism experiences.

Economically, tourism is a crucial sector for South Africa, contributing approximately 8.6% to GDP and supporting 1.5 million jobs before the pandemic. The rebound in both international and domestic travel has revived tourism's role as a key economic driver. Domestic tourism, in particular, has seen substantial growth, with South Africans exploring local destinations, nature reserves, and adventure tourism experiences. This strong domestic demand has provided a buffer against the volatility of international travel and has contributed to overall sector stability and economic resilience. This aligns closely with the priorities of the District Development Model (DDM), which emphasises geographic diversity and the integration of underrepresented areas into the tourism economy.

A critical enabler of South Africa's tourism revival has been the improvement in air connectivity. The return of direct international flights enhanced regional air links, and partnerships with airlines have made travel to and within South Africa more accessible. Coupled with investments in airport infrastructure and tourism-related facilities, these developments have supported both long-haul and regional arrivals, positioning South Africa as a major hub for travel within Africa.

The global shift towards sustainability is shaping tourism experiences worldwide, and South Africa is no exception. The country's focus on responsible travel and sustainable tourism practices aligns well with the preferences of modern travellers who are increasingly seeking eco-friendly destinations, cultural immersion, and experiences that contribute positively to local communities. By promoting environmental conservation, supporting local economies, and enhancing cultural tourism, South Africa is building a more sustainable and inclusive tourism sector.

The key trends in tourism, as outlined in Global Travel Trends 2024 by Trend Hunter, focus on evolving consumer preferences and the growing importance of sustainability, inclusivity, and experiential travel. Below is a summary of the most notable trends:

- 1) **Eco-Conscious and Experiential Accommodations:** Hospitality brands are increasingly integrating eco-friendly designs and self-sustaining accommodation that appeal to consumers prioritising sustainability and unique experiences. This trend reflects the growing desire for immersive and environmentally conscious travel.
- 2) **Rise of Microcations:** Short, activity-packed getaways (microcations) are gaining popularity due to busy schedules and the desire for cost-effective trips. These offer frequent escapes while minimising environmental impact, appealing to diverse traveller demographics.
- 3) **Enhanced Traveller Well-being:** The focus on traveller well-being has increased, with innovations designed to reduce health anxiety and improve comfort. Brands are prioritising holistic travel experiences that cater to physical and emotional well-being, including jet lag remedies and child-friendly programmes.
- 4) **Inclusivity in Travel:** There is a significant emphasis on creating accessible and inclusive travel experiences for a wide range of demographics, including individuals with disabilities, LGBTQ+ travellers, and diverse ethnic groups. This trend focuses on offering empowering, equitable travel options.
- 5) **Integration of Web3 and Smart Technologies:** The adoption of technologies like Metaverse, NFTs, and artificial intelligence driven tools is reshaping the tourism industry. These innovations are enhancing personalised travel planning and real-time engagement with travellers, signalling a shift towards a more digitally integrated travel experience.
- 6) **Transformative and Mindful Travel Experiences:** Consumers are seeking travel opportunities that promote emotional growth and mindfulness. This includes meditation retreats and self-discovery journeys, with an increasing preference for meaningful escapism.

These trends underscore a broader shift in the travel industry toward sustainability, personalisation, and creating enriching experiences that resonate with travellers' evolving preferences.

Additionally, South Africa is well-placed to leverage opportunities in the Meetings, Incentives, Conferences, and Exhibitions (MICE) sector. The country's world-class facilities, combined with its strategic geographic position, make it an attractive destination for business events, large-scale conferences, and international

exhibitions. This segment is expected to play a key role in diversifying the tourism portfolio and ensuring year-round demand.

The overall outlook for South African tourism is optimistic, with full recovery to pre-pandemic levels anticipated by 2024. However, challenges such as economic uncertainties, competition from other destinations, and evolving travel restrictions necessitate a strategic approach to market targeting and investment. The resurgence in key African source markets and the growing potential in international markets provide strong opportunities for growth. By leveraging enhanced connectivity, sustainable tourism practices, and diverse tourism offerings, South Africa is well-positioned to capitalise on revitalised travel demand, drive economic recovery, and achieve long-term sector growth.

PESTEL Analysis

This political, economic, social, technological, environmental and legal (PESTEL) analysis outlines the external factors impacting South Africa's tourism industry, including the political and economic challenges and tightening fiscal policies. Despite these obstacles, opportunities exist to leverage technological advancements and legal reforms while adopting sustainable environmental practices to support the recovery and growth of tourism.

FACTOR	GLOBAL CONTEXT	SOUTH AFRICAN CONTEXT
Political	<ul style="list-style-type: none"> ▪ Rising nationalism, protectionist policies, and political instability are impacting international travel. ▪ Elections and policy shifts: The year 2024 has been marked by significant elections worldwide, resulting in political shifts that may affect travel policies and international relations. Notably, Donald Trump's victory in the US presidential election introduces potential changes in US foreign policy and international travel regulations. ▪ Trade policies and geopolitical tensions, such as the US-China trade war, disrupt global supply chains, including those in tourism and hospitality. 	<ul style="list-style-type: none"> ▪ The GNU, formed after the 2024 elections, creates hope for balanced governance but raises concerns over internal tensions and policy inconsistencies. ▪ Corruption, governance issues, and perceived political instability could damage South Africa's image as a safe and attractive tourist destination.
Economic	<ul style="list-style-type: none"> ▪ Post-pandemic global economic recovery remains uneven, with growth in the US, India, and Brazil, but slower recovery in East Asia. ▪ China is one of the important source markets for South Africa with an 82% increase in the number of Chinese visitors to South Africa between January and March 2024. However, as the Chinese traveller have a short 	<ul style="list-style-type: none"> ▪ South Africa's economic situation is fragile, marked by high unemployment, slow GDP growth, and a tightening fiscal policy. ▪ The GDP contraction in early 2024 and high public debt further strain public investment, affecting tourism infrastructure development.

FACTOR	GLOBAL CONTEXT	SOUTH AFRICAN CONTEXT
	<p>booking time, the visa application time for South Africa becomes a key barrier.</p> <ul style="list-style-type: none"> ▪ The India market continues to experience significant delays in visa issuance, resulting in cancellations and financial losses for travel agents. ▪ Economic performance directly impacts tourism through its influence on disposable income and leisure travel budgets. ▪ Inflationary pressures and rising interest rates limit consumer spending, particularly on discretionary travel and leisure. 	<ul style="list-style-type: none"> ▪ Fiscal austerity measures limit public spending on services and infrastructure essential for tourism, affecting the country's attractiveness as a destination and the ability to develop inclusive tourism strategies.
Social	<ul style="list-style-type: none"> ▪ Misinformation and disinformation, especially around safety and health issues, are major challenges for travellers, creating apprehension about visiting certain destinations. ▪ There is an increased preference for destinations aligned with personal values, such as sustainability and responsible tourism, which is particularly strong in Western markets. 	<ul style="list-style-type: none"> ▪ South Africa grapples with social unrest, high crime rates, and inequality, which can deter tourists. Addressing these issues through improvements in public safety, infrastructure, and targeted tourism campaigns is essential. ▪ Embracing inclusive tourism policies that address social issues, like unemployment and inequality, can strengthen both domestic and international tourism markets.
Technological	<ul style="list-style-type: none"> ▪ Advanced data analytics, automation, and digital platforms are shaping traveller experiences, offering more personalised services and enabling efficient market targeting. ▪ Technologies like blockchain and the Internet of Things improve secure transactions (e.g., bookings) and provide seamless travel services (e.g., smart airports and automated hotel check-ins). 	<ul style="list-style-type: none"> ▪ South Africa has made progress in technological infrastructure, especially in urban areas, but struggles with energy and water supply security, which can affect rural tourism experiences and operational consistency. ▪ Digital platforms (e.g., e-visas and mobile bookings) and bridging technological infrastructure gaps are crucial for boosting tourism competitiveness.
Environmental	<ul style="list-style-type: none"> ▪ Climate change poses risks to tourism, with rising temperatures, extreme weather, and sea-level rise affecting popular destinations. ▪ Tourists are increasingly seeking eco-friendly travel options and destinations prioritising sustainability. 	<ul style="list-style-type: none"> ▪ Environmental challenges, such as water scarcity, extreme weather, and biodiversity loss, impact South Africa's nature-based tourism (e.g., safaris and coastal attractions). ▪ Limited government capacity for environmental conservation places

FACTOR	GLOBAL CONTEXT	SOUTH AFRICAN CONTEXT
		<p>responsibility on the private sector to adopt sustainable tourism practices.</p> <ul style="list-style-type: none"> Adapting to climate change and investing in green infrastructure are key for long-term tourism sustainability.
Legal	<ul style="list-style-type: none"> Legal frameworks for emerging technologies like digital transactions, data privacy, cybersecurity and consumer rights are evolving, impacting global tourism operations and service standards. A transparent legal environment is essential to building trust among travellers and facilitating smooth travel processes. 	<ul style="list-style-type: none"> South Africa's legal complexity, along with high corruption and crime rates, remain a deterrent for tourists. Addressing corruption, stable e-visa systems, and legal reforms around safety and justice are critical to enhancing South Africa's appeal as a tourism destination.

1.2. INTERNAL ENVIRONMENTAL ANALYSIS

South African Tourism has achieved progress towards its strategic intent, particularly in the areas of marketing and international brand presence. Positive developments have occurred across several regions, including growth in tourism arrivals from Africa, Europe, and the Americas. The organisation has effectively tailored regional strategies to meet specific market needs, contributing to increased visibility and market engagement.

Events like Meetings Africa and Africa's Travel Indaba have served as significant platforms for promoting South Africa's tourism offerings. These events have attracted various stakeholders and positioned the country as a destination for both leisure and business travel, contributing to international brand awareness and laying the foundation for tourism growth in key market segments.

Market trends indicate a shift in consumer preferences, with growing demand for sustainable travel experiences, eco-friendly tourism, and community-based offerings. Additionally, limited direct air connectivity has posed a barrier to accessing key markets, affecting efforts to increase tourism arrivals. The organisation recognises the need to align its service offerings with these trends to maintain competitiveness in the tourism sector and address evolving traveller interests.

Challenges remain in ensuring consistent performance across all strategic initiatives. Financial constraints have limited the reach of certain campaigns and budget reductions have impacted the effective implementation of marketing strategies, resulting in some programmes not achieving their full potential. Uncertainty regarding additional revenue streams has further affected planning. To address financial sustainability and resource allocation challenges, proposals for a 'centre of excellence' for financial practices and a more strategic approach to budget optimisation are under consideration.

Organisational culture and design have been highlighted as key issues affecting the achievement of the strategy. While South African Tourism has a dedicated workforce with valuable market insights, gaps in capacity building, skills development, and internal cohesion have impacted overall performance. A workforce that is motivated, inclusive, and aligned with strategic priorities is crucial. To this end, there is a

focus on fostering a collaborative, high-performance culture, enhancing internal communication, and ensuring that the organisational structure supports strategic delivery.

Technology infrastructure is another area requiring enhancement. The current digital platforms and information and communication technology (ICT) systems are fragmented and outdated, affecting operational efficiency and limiting the use of data for marketing and customer relationship management. Addressing these gaps is critical for improving overall effectiveness. There is a focus on upgrading digital platforms, implementing enhanced customer relationship management systems, and adopting advanced data analytics to improve customer engagement and informed decision-making.

Operational processes and policy alignment have also been identified as needing improvement. Delays in internal approvals, operational policy misalignments, and fragmented workflows have led to inconsistencies in programme delivery and hindered the organisation's ability to respond swiftly to market trends. Streamlining workflows, improving internal communication, and aligning daily operations with strategic priorities are key measures to achieve responsive and effective service delivery.

Stakeholder engagement and partnerships are central to South African Tourism's development objectives. Building stronger relationships with government entities, private sector partners, travel agencies, tourism enterprises, and international collaborators is necessary to align strategies and foster collaborative efforts. Enhancing stakeholder engagement strategies will drive market growth and ensure that tourism development efforts are cohesive and impactful.

While South African Tourism has made significant strides in marketing, stakeholder partnerships, and brand positioning, challenges related to organisational culture, digital infrastructure, financial constraints, and operational processes present areas for improvement. Addressing these issues through cultural alignment, technology enhancements, and improved financial and operational practices will enable the organisation to achieve its strategic objectives effectively.

Internal SWOT Analysis

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> Strong market position across multiple markets with unique offerings like safaris, nature experiences, and cultural events. Key events like Meetings Africa and Africa's Travel Indaba enhance South Africa's position as a tourism destination. Diverse partnerships with government, private sector, and 	<ul style="list-style-type: none"> Outdated ICT systems and fragmented technology infrastructure limit efficiency and market reach. Skills gaps in digital marketing, technology, and data analytics, along with capacity issues in service models. Operational inefficiencies like delayed approvals, complex travel policies, and 	<ul style="list-style-type: none"> Digital transformation through customer-relationship management systems, e-visa processes, and data analytics to improve market reach and customer experience. Growing demand for sustainable travel, eco-friendly experiences, and wellness tourism aligns with South Africa's offerings. Expansion into niche markets like medical 	<ul style="list-style-type: none"> Economic volatility, inflation, and exchange rate fluctuations impact travel budgets and demand. Competing global and African destinations are enhancing tourism offerings, creating a need for innovation. Operational challenges, policy misalignment, and governance issues may limit strategic

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>tourism stakeholders for collaborative campaigns.</p> <ul style="list-style-type: none"> Passionate workforce with strong understanding of regional markets, enabling effective localised strategies. 	<p>misaligned strategies affect programme implementation.</p> <ul style="list-style-type: none"> Budget constraints and inconsistent financial streams hinder key marketing campaigns and strategic initiatives. 	<p>tourism, educational travel, and MICE sector for diversified revenue streams.</p> <ul style="list-style-type: none"> Enhanced trade and stakeholder engagement to support tourism growth and create a unified market approach. 	<p>responses to market opportunities.</p> <ul style="list-style-type: none"> Perception of safety and limited air connectivity from certain markets present barriers to tourism growth.

PART C: MEASURING OUR PERFORMANCE

Informed by the legislative and policy mandates and the strategic focus, the Five-Year Strategic Plan for 2025 to 2030 presents the impact statement of South African Tourism as:

A tourism sector that drives sustainable economic growth and job creation, ensures inclusive benefits, and promotes environmental and cultural sustainability.

The Strategic Plan for 2025 to 2030 presents the outcomes for the five years, aligned to the NDP 2030, MTDP 2024 to 2029, the NTSS and the Tourism Sector Master Plan.

1. INSTITUTIONAL PROGRAMME PERFORMANCE INFORMATION

South African Tourism is constituted by five budget programmes, which inform the packaging of this 2025/26 Financial Year Annual Performance Plan:

Programme	Programme Purpose
Programme 1: Corporate Support	To provide effective support services to the organisation, as well as ensure compliance with statutory requirements; and ensure strategy development and integration with business performance monitoring, governance, and evaluation.
Programme 2: Business Enablement	To enhance collaboration with various stakeholders; and 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, and 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
Internal Audit	To provide independent and objective assurance and consulting activity designed to add value and improve the organisation's operations.
Governance, Risk, Compliance and Company Secretariat	To provide efficient, effective, and proactive legal, governance, enterprise risk, and compliance support services to South African Tourism.
Human Capital	To build an inspired and energised organisation and ensure that the organisation has the necessary skills and capacity to operate successfully.
Finance, Supply Chain Management and Facilities	To provide and manage effective end-to-end financial management and supply chain support services to the organisation.
ICT	To create business value by delivering ICT-related systems and services that increase operational efficiency and effectiveness.
Office of the Chief Executive Officer	To provide strategic support to the Chief Executive Officer (CEO) to achieve the mandate and outcomes of South African Tourism.
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: "A tourism sector that drives sustainable economic growth and job creation, ensures inclusive benefits, and promotes environmental and cultural sustainability", the Corporate Support Programme supports delivery of all four outcomes but delivers against specific interventions of the following outcome and five-year targets in the Strategic Plan for 2025 to 2030:

Institutional Outcome	Outcome Indicator	Baseline (2024)	Five-Year Target (2030)
4: Organisational excellence and a high-performance culture	External audit outcome	Qualified audit outcome as at August 2024	Clean audit outcome
	Staff Engagement Survey score	52.2% as at March 2023	90%
	Productivity Tracking Matrix score	New indicator: Establish baseline in FY25/26	Improvement from FY25/26 baseline

The FY25/26 performance plan of Programme 1 is reflected in the log frame tables below:

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

OUTCOMES	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
4: Organisational excellence and a high-performance culture	Enhanced internal control environment and mitigation of audit findings	Percentage of valid internal and external audit recommendations implemented	98% implementation of valid audit recommendations	100% implementation of valid audit recommendations	91% implementation of valid audit recommendations	100% implementation of valid audit recommendations	Implement 100% of valid audit recommendations	Implement 100% of valid audit recommendations	Implement 100% of valid audit recommendations
	Operation Clean Audit implemented towards an improved audit outcome and sound governance	Annual Operation Clean Audit Programme implemented	N/A	N/A	FY23/24 Corporate Compliance Campaign (Operation Clean Audit) was implemented with the exception of one activity	FY2024/25 Corporate Compliance Campaign (Operation Clean Audit) implemented	Implement the FY25/26 Operation Clean Audit Programme	Implement the FY26/27 Operation Clean Audit Programme	Implement the FY27/28 Operation Clean Audit Programme
	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	N/A	New indicator	6 SCM ethics and integrity initiatives implemented	6 SCM ethics and integrity initiatives implemented	Implement 8 initiatives that promote compliance, integrity and ethical conduct in the procurement of goods and services	Implement 7 initiatives that promote compliance, integrity and ethical conduct in the procurement of goods and services	Implement 7 initiatives that promote compliance, integrity and ethical conduct in the procurement of goods and services
	Improved staff engagement and morale	Staff Engagement Survey Two-Year	N/A	New indicator	Staff engagement survey conducted	Annual implementation of the Staff Engagement	Implement the annual deliverables of the Staff Engagement	Implement the annual deliverables of the Staff Engagement	Implement the annual deliverables of the Staff Engagement

OUTCOMES	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
		Improvement Plan implemented				Survey Two-Year Improvement Plan	Survey Two-Year Improvement Plan	Survey Two-Year Improvement Plan	Survey Two-Year Improvement Plan
							Conduct a staff engagement survey to assess engagement levels		Conduct a staff engagement survey to assess engagement levels
	Organisational design enabling optimal functioning of the entity	Reviewed organisational design implemented	N/A	N/A	N/A	New indicator	Review the operating model for the entity	N/A	N/A
							Implement the reviewed organisational structure		
	Track productivity to enable a high performance culture	Productivity Matrix established	N/A	N/A	N/A	New indicator	Establish the baseline for the Productivity Matrix	Monitor the Productivity Matrix	Monitor the Productivity Matrix

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

OUTPUTS	OUTPUT INDICATORS	ANNUAL TARGETS (2025/26)	QUARTERLY TARGETS			
			Q1 Apr - Jun 2025	Q2 Jul - Sep 2025	Q3 Oct - Dec 2025	Q4 Jan - Mar 2026
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	Implement 40% of valid internal and external audit recommendations	Implement 60% of valid internal and external audit recommendations	Implement 100% of valid internal and external audit recommendations
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	Implement the Operation Clean Audit Programme	Implement the Operation Clean Audit Programme	Implement the Operation Clean Audit Programme
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)	-	-	Confirm budget allocation for each business unit for the FY2026/27 and related accountability (S57 of PFMA)
			Conduct capacity building for procurement committees	-	Conduct capacity building for procurement committees	Conduct capacity building for procurement committees
			Create organisation-wide awareness on the SCM code of conduct	Conduct organisation-wide training on ethics in the public service	-	Conduct organisation-wide training on PFMA
Improved staff and engagement 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	Publish 3 Human Capital newsletters	Publish 3 Human Capital newsletters	Publish 3 Human Capital newsletters
			Implement the Peer Recognition Programme	Implement the Peer Recognition Programme	Implement the Peer Recognition Programme	Implement the Peer Recognition Programme

OUTPUTS	OUTPUT INDICATORS	ANNUAL TARGETS (2025/26)	QUARTERLY TARGETS			
			Q1 Apr - Jun 2025	Q2 Jul - Sep 2025	Q3 Oct - Dec 2025	Q4 Jan - Mar 2026
			-	Implement 1 employee wellness activity	Implement 1 employee wellness activity	-
		Conduct a staff engagement survey to assess engagement levels	-	-	-	Conduct a staff engagement survey to assess engagement levels
						Table the Staff Engagement Survey Report with ExCo
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	-	-	-
		Implement the reviewed organisational structure	-	Review the organisational structure to capacitate the entity	Implement the reviewed organisational structure to capacitate the entity	Implement the reviewed organisational structure to capacitate the entity
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	Establish the baseline for the Productivity Matrix to assess levels of productivity	-	-

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

The Corporate Support Programme underpins Outcome 4: Organisational Excellence and a High-Performance Culture by enabling South African Tourism to operate efficiently and effectively. This foundational programme focuses on strengthening governance, ICT infrastructure, financial management, and workforce development to create a high-performing, resilient organisation.

The programme's human capital initiatives focus on developing a skilled, motivated, and inclusive workforce. Key deliverables include talent management strategies, leadership development initiatives, employee wellness programmes, and recognition systems that align staff capabilities with strategic intent. These efforts aim to foster equitable opportunities for women, youth, and persons with disabilities, promoting an inclusive and high-performing organisational culture.

A critical focus for the 2025/26 period is the finalisation and implementation of the organisational design to align with the new strategic plan and ensure optimal structuring and resourcing. This work will address skills gaps, build institutional capacity, and provide the agility required to achieve strategic objectives.

The implementation of a productivity tracking matrix is a significant enhancement in performance monitoring for FY2025/26. This initiative will establish a baseline framework to measure operational efficiency and resource utilisation across programmes, providing critical insights to optimise performance and drive continuous improvement.

ICT priorities encompass governance enhancements, cybersecurity measures, and digital transformation projects, such as integrating cloud-based systems and upgrading infrastructure to support operational efficiency and innovation. These initiatives are central to ensuring that South African Tourism remains technologically advanced and well-equipped to meet future demands.

Governance and compliance efforts will focus on strengthening accountability, adhering to PFMA requirements, and embedding ethical practices across all operations. Key outputs include the 100% implementation of valid audit recommendations, the rollout of the "Operation Clean Audit" campaign, and the advancement of ethical procurement initiatives to build trust and integrity within the organisation.

Dependencies, such as resource availability, skills development, and effective leadership, are critical to achieving these outputs. The programme will mitigate risks through phased implementation, continuous capacity building, and robust monitoring and evaluation frameworks. By embedding a culture of accountability, innovation, and inclusivity, the Corporate Support Programme ensures that South African Tourism is well-positioned to deliver on its strategic intent and contribute meaningfully to sustainable tourism growth and development.

1.1.5. PROGRAMME 1: RESOURCE CONSIDERATIONS

Programme 1: Administration (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
Economic classification:							
Compensation of employees	56 794	59 258	70 605	72 740	85 004	88 937	93 021

Programme 1: Administration (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
Goods and services	91 685	144 460	112 169	109 658	118 591	124 078	129 776
Depreciation	6 289	8 560	-	-	-	-	-
Total expenses	154 768	212 278	182 774	182 398	203 595	213 015	222 797
Staff complement	54						

1.2. PROGRAMME 2: BUSINESS ENABLEMENT

1.2.1. PROGRAMME PURPOSE

The Business Enablement Programme includes the following business units:

Business Unit	Purpose
Industry and Government Relations	To enhance collaboration with various stakeholders.
Digital Transformation (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.

In contributing towards the South African Tourism impact of: “A tourism sector that drives sustainable economic growth and job creation, ensures inclusive benefits, and promotes environmental and cultural sustainability”, the Business Enablement Programme supports delivery of all four outcomes, but delivers against specific interventions of the following outcome and five-year target in the Strategic Plan for 2025 to 2030:

Institutional Outcome	Outcome Indicator	Baseline (2024)	Five-Year Target (2030)
Outcome 3: Insights-led sector thought leadership and advocacy	Satisfaction Score with South African Tourism’s engagement	3.5 as at March 2024	4

The FY25/26 performance plan of Programme 2 is reflected in the log frame tables below:

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

OUTCOMES	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
Outcome 3: Insights-led sector thought leadership and advocacy	Tourism information tracking to monitor arrivals, spend, and brand performance	Number of tourism information tracking surveys conducted	N/A	New indicator	5 tourism information tracking surveys completed	5 tourism information tracking surveys completed	Conduct 3 tourism information tracking surveys	Conduct 5 tourism information tracking surveys	Conduct 5 tourism information tracking surveys
	Assessment of tourist perceptions of South Africa as a destination	Sentiment Index established	N/A	N/A	New indicator	Create a benchmark for the Sentiment Index	Establish the Sentiment Index baseline	Monitor the Sentiment Index score against the baseline	Monitor the Sentiment Index score against the baseline
	Enhanced public and private sector collaboration on tourism	Number of stakeholder engagement activities implemented	Conducted a survey to establish a new baseline for South African Tourism Corporate Brand Index	74.65 South African Tourism Corporate Brand Index	71.81 South African Tourism Corporate Brand Index	74.24 South African Tourism Corporate Brand Index	Implement 16 stakeholder engagement activities	Implement 16 stakeholder engagement activities	Implement 16 stakeholder engagement activities
	Enhanced visitor experience through digital platforms	Number of digital platforms implemented	N/A	Integrated Digital and Analytics Operating Framework Annual Year 1 Roadmap Implemented	Integrated Digital and Analytics Operating Framework Annual Year 2 Roadmap Implemented	Integrated Digital and Analytics Operating Framework Annual Year 3 Roadmap Implemented	Implement one digital platform	Implement one digital platform	Implement one digital platform

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

OUTPUTS	OUTPUT INDICATORS	ANNUAL TARGETS (2025/26)	QUARTERLY TARGETS			
			Q1 Apr - Jun 2025	Q2 Jul - Sep 2025	Q3 Oct - Dec 2025	Q4 Jan - Mar 2026
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	Produce the Departure Survey Fieldwork Report	Produce the Departure Survey Fieldwork Report	Produce the Departure Survey Fieldwork Report
			Produce the Domestic Tourism Survey Fieldwork Report	Produce the Domestic Tourism Survey Fieldwork Report	Produce the Domestic Tourism Survey Fieldwork Report	Produce the Domestic Tourism Survey Fieldwork Report
			-	Produce the Business Events Brand Equity Survey Fieldwork Report	-	Produce the Business Events Brand Equity Survey Fieldwork Report
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	Develop the calculation model for the Sentiment Index	Investigate the measurement of the Sentiment Index score by product type	Establish the baseline for South Africa's Sentiment Index
Enhanced public and private sector collaboration on tourism	Number of stakeholder engagement activities implemented	Implement 16 stakeholder engagement activities	Convene strategic dialogue with tourism sector role-players	Convene strategic dialogue with tourism sector role-players	Convene strategic dialogue with tourism sector role-players	Convene strategic dialogue with tourism sector role-players
			Recognise stakeholder contributions to achievements in the tourism sector	-	-	Recognise stakeholder contributions to achievements in the tourism sector
			Implement the MOU with the Tourism Business Council of South Africa	Implement the MOU with the Tourism Business Council of South Africa	Implement the MOU with the Tourism Business Council of South Africa	Implement the MOU with the Tourism Business Council of South Africa
			Conduct CEOs Forum with Provincial Tourism Authorities	Conduct CEOs Forum with Provincial Tourism Authorities	Conduct CEOs Forum with Provincial Tourism Authorities	Conduct CEOs Forum with Provincial Tourism Authorities

OUTPUTS	OUTPUT INDICATORS	ANNUAL TARGETS (2025/26)	QUARTERLY TARGETS			
			Q1 Apr - Jun 2025	Q2 Jul - Sep 2025	Q3 Oct - Dec 2025	Q4 Jan - Mar 2026
			Participate in engagements with Department of Tourism	Participate in engagements with Department of Tourism	Participate in engagements with Department of Tourism	Participate in engagements with Department of Tourism
			-	-	-	Conduct a survey to determine the Satisfaction Score with South African Tourism's engagement
Enhanced visitor experience through digital platforms	Number of digital platforms implemented	Implement one digital platform	Develop the phased approach for the development of the traveller application digital platform for approval	Develop Phase 1 of the traveller application digital platform	Go-live of Phase 1 of the traveller application digital platform	Assess the go-live of Phase 1 of the traveller application digital platform
			Develop the technical specifications for Phase 1 of the traveller application digital platform			Develop the technical specifications for Phase 2 of the traveller application digital platform

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

Business Enablement plays a vital role in achieving Outcome 3: Insights-Led Sector Thought Leadership and Advocacy and supporting Outcome 4: Organisational Excellence and a High-Performance Culture. It underpins South African Tourism's capacity to leverage data, digital transformation, and stakeholder collaboration for informed decision-making and enhanced sector cohesion.

The Analytics and Insights Unit spearheads research initiatives, including the International and Domestic Brand Tracker surveys, Business Events Brand Tracker surveys, and trends analysis reports. These outputs provide actionable insights that shape South African Tourism's marketing strategies, visitor experiences, and policy recommendations. By tapping into real-time market data, the unit equips South African Tourism with the foresight to anticipate market dynamics and emerging tourism trends. Enablers for successful implementation include access to advanced analytics tools, collaboration with research partners, and sufficient capacity (both in terms of human and technological resources) to effectively manage and operationalise data analytics systems.

The Digital Transformation Unit oversees the implementation of the Integrated Digital and Analytics Operating Framework, which seeks to enhance South African Tourism's ability to visualise and act on data insights. Key outputs for FY2025/26 include developing the traveller application and streamlining South African Tourism's digital infrastructure to enable real-time decision-making. These advancements are critical for ensuring that South African Tourism remains competitive in an increasingly digital tourism landscape and that marketing strategies are informed by robust, data-driven intelligence. However, achieving these milestones will require addressing current resource constraints by securing additional funding and personnel, alongside targeted skills development in advanced digital tools, artificial intelligence, and analytics platforms.

The Industry and Government Relations Unit seeks to strengthen partnerships across the public and private sectors, ensuring that stakeholder engagement is effective, policy frameworks are aligned, and tourism strategies are consistent. This will drive a whole-of-tourism approach, promoting cohesion and enhancing South African Tourism's credibility. Conducting the Satisfaction Score Survey will provide critical insights into stakeholder perceptions and improve engagement strategies. Strategic communication plans, transparent engagement, and building strong relationships with government, trade, and industry partners are vital dependencies for achieving this intent.

By embedding transformation and inclusivity into all its activities, Programme 2 supports South African Tourism's mandate to promote equitable growth. Disaggregated data from tracking surveys will inform inclusive strategies, while stakeholder engagements will ensure representation of diverse groups, including women, youth, and persons with disabilities. Sustainability remains a cross-cutting focus, with the establishment of the Sustainability Index laying the groundwork for environmental and cultural preservation initiatives across the sector.

1.2.5. PROGRAMME 2: RESOURCE CONSIDERATIONS

Programme 2: Business Enablement (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
Economic classification:							
Compensation of employees	15 306	10 942	14 368	14 684	16 410	17 169	17 957
Goods and services	65 679	59 600	64 085	57 045	73 822	77 238	80 785
Total expenses	80 985	70 543	78 452	71 729	90 232	94 407	98 742
Staff complement	9						

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 Public Relations (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: "A tourism sector that drives sustainable economic growth and job creation, ensures inclusive benefits, and promotes environmental and cultural sustainability", the Leisure Tourism Marketing Programme delivers against the following outcomes and five-year targets in the Strategic Plan for 2025 to 2030:

Institutional Outcome	Outcome Indicator	Baseline (2024)	Five-Year Target (2030)
Outcome 1: Strengthened market position and tourism growth	International tourist arrivals	8.81 million as at March 2024: Leisure: 8.48 million MICE: 333.9 thousand	15 million: Leisure: 14.63 million MICE: 374.3 thousand
	International tourist spend	R95.1 billion as at March 2024: Leisure: R90.47 billion MICE: R4.63 billion	R115.2 billion: Leisure: R109.59 billion MICE: R5.61 billion
	Geographic spread of international tourist arrivals	9.7% as at March 2024	13.9%
	Domestic tourist trips	37.9 million as at March 2024	45.1 million
	Domestic tourist spend	R123 billion as at March 2024	R139.4 billion

Institutional Outcome	Outcome Indicator	Baseline (2024)	Five-Year Target (2030)
	Geographic spread of domestic tourist arrivals	3.3% as at March 2024	4.0%
	South Africa Leisure Brand Strength Index	45.6 as at March 2024	51
	Number of bids won (MICE)	227 as at March 2024	366
	Economic impact of bids won (MICE)	R3.9 billion as at March 2024	R6.3 billion
3. Insights-led sector advocacy and thought leadership	Satisfaction Score with South African Tourism's engagement	3.5 as at March 2024	4

The FY25/26 performance plan of Programme 3 is reflected in the log frame tables below:

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

OUTCOMES	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
Outcome 1: Strengthened market position and tourism growth	Global Tourism Brand Campaign to create demand for South Africa as a premier tourist destination	Global Tourism Brand Campaign implemented	One annual campaign was launched with the global roll-out	FY22/23 Global Tourism Brand Campaign Plan was developed with 7 out of 10 planned activities implemented	FY23/24 Global Tourism Brand Campaign Plan implemented	FY2024/25 Global Tourism Brand Campaign creative concept finalised and approved	Implement the FY25/26 Global Tourism Brand Campaign Execution Plan	Implement the FY26/27 Global Tourism Brand Campaign Execution Plan	Implement the FY27/28 Global Tourism Brand Campaign Execution Plan
	Integrated digital marketing to increase brand visibility for destination South Africa	Integrated Digital Marketing Strategy implemented	N/A	N/A	New indicator	Integrated Digital Marketing Strategy developed and approved	Implement the FY25/26 Integrated Digital Marketing Strategy	Implement the FY26/27 Integrated Digital Marketing Strategy	Implement the FY27/28 Integrated Digital Marketing Strategy
	Destination South Africa profiled through strategic events	Number of communication activities to profile destination South Africa through strategic events implemented	N/A	N/A	N/A	New indicator	Implement 4 communication activities to profile destination South Africa through strategic events	Implement 4 communication activities to profile destination South Africa through strategic events	Implement 4 communication activities to profile destination South Africa through strategic events
Outcome 3: Insights-led sector advocacy and thought leadership	Global public relations and communications to strengthen the destination brand	Number of global public relations and communications activities to strengthen the	N/A	N/A	N/A	New indicator	Implement 36 global public relations and communications activities to strengthen the destination brand	Implement 38 global public relations activities to strengthen the destination brand	Implement 40 global public relations activities to strengthen the destination brand

OUTCOMES	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
		destination brand implemented							
Outcome 1: Strengthened market position and tourism growth	Leisure tourism campaigns to increase demand in South Africa	Number of domestic leisure tourism campaigns executed	3 domestic campaigns delivered	3 domestic campaigns delivered	3 domestic campaigns delivered	3 domestic campaigns delivered	Execute 3 domestic leisure tourism campaigns	Execute 3 domestic leisure tourism campaigns	Execute 3 domestic leisure tourism campaigns
	Brand affinity to increase conversion in South Africa	Number of distribution channel initiatives in the domestic market implemented	N/A	New indicator	19 distribution channel initiatives implemented	16 distribution channel initiatives implemented in the domestic market	Implement 16 distribution channel initiatives in the domestic market	Implement 16 distribution channel initiatives in the domestic market	Implement 16 distribution channel initiatives in the domestic market
	Localised marketing campaigns to increase demand in the Africa region	Number of localised marketing campaigns in the Africa region executed	New indicator	4 campaigns delivered	4 campaigns delivered	4 regional seasonal campaigns implemented	Execute 4 localised marketing campaigns in the Africa region	Execute 2 localised marketing campaigns in the Africa region	Execute 2 localised marketing in the Africa region
	Brand affinity to increase conversion in the Africa region	Number of distribution channel initiatives in the Africa region implemented	N/A	New indicator	24 distribution channel initiatives implemented in the market	26 distribution channel initiatives implemented in the Africa (regional) markets	Implement 26 distribution channel initiatives in the Africa region	Implement 20 distribution channel initiatives in the Africa region	Implement 20 distribution channel initiatives in the Africa region
	Localised marketing campaigns to increase demand in the Europe region	Number of localised marketing campaigns in the Europe region executed	New indicator	4 marketing campaigns implemented in Europe	4 marketing campaigns implemented in Europe	4 marketing campaigns implemented in Europe	Execute 4 localised marketing campaigns in the Europe region	Execute 4 localised marketing campaigns in the Europe region	Execute 4 localised marketing campaigns in the Europe region

OUTCOMES	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
	Brand affinity to increase conversion in the Europe region	Number of distribution channel initiatives in the Europe region implemented	N/A	New indicator	126 distribution channel initiatives implemented in Europe	30 distribution channel initiatives implemented in Europe	Implement 36 distribution channel initiatives in the Europe region	Implement 36 distribution channel initiatives in the Europe region	Implement 36 distribution channel initiatives in the Europe region
	Localised marketing campaigns to increase demand in the Americas region	Number of localised marketing campaigns in the Americas region executed	N/A	2 marketing campaigns implemented	2 Americas hub localised brand campaigns implemented	1 localised brand campaign implemented	Execute 2 localised marketing campaigns in the Americas region	Execute 2 localised marketing campaigns in the Americas region	Execute 2 localised marketing campaigns in the Americas region
	Brand affinity to increase conversion in the Americas region	Number of distribution channel initiatives in the Americas region implemented	N/A	New indicator	99 distribution channel initiatives implemented in market	12 distribution channel initiatives implemented in market	Implement 12 distribution channel initiatives in the Americas region	Implement 16 distribution channel in the Americas region	Implement 20 distribution channel initiatives in the Americas region
	Localised marketing campaigns to increase demand in the Asia Australasia region	Number of localised marketing campaigns in the Asia Australasia region executed	N/A	9 localised brand campaigns implemented in the Asia Australasia region	4 localised brand campaigns implemented in the Asia Australasia region	4 localised brand campaigns in the Asia Australasia region	Execute 4 localised marketing campaigns in the Asia Australasia region	Execute 4 localised marketing campaigns in the Asia Australasia region	Execute 4 localised marketing campaigns in the Asia Australasia region
	Brand affinity to increase conversion in the Asia Australasia region	Number of distribution channel initiatives in the Asia Australasia region implemented	N/A	New indicator	42 distribution channel initiatives implemented in the Asia Australasia region	12 distribution channel initiatives implemented in the Asia Australasia region	Implement 16 distribution channel initiatives in the Asia Australasia region	Implement 20 distribution channel initiatives in the Asia Australasia region	Implement 20 distribution channel initiatives in the Asia Australasia region

OUTCOMES	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
	Localised marketing campaigns to increase demand in the Embassy Support markets	Number of localised marketing campaigns in the Embassy Support markets executed	N/A	N/A	1 localised brand campaigns implemented in Embassy Support markets	1 localised brand campaign implemented in Embassy Support markets	Execute 1 localised marketing campaign in the Embassy Support markets	Execute 2 localised marketing campaigns in the Embassy Support markets	Execute 2 localised marketing campaigns in the Embassy Support markets
	Brand affinity to increase conversion in the Embassy Support markets	Number of distribution channel initiatives in the Embassy Support markets implemented	N/A	New indicator	26 distribution channel initiatives implemented in Embassy Support markets	16 distribution channel initiatives implemented in Embassy Support markets	Implement 16 distribution channel initiatives in the Embassy Support markets	Implement 20 distribution channel initiatives in the Embassy Support markets	Implement 20 distribution channel initiatives in the Embassy Support markets

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

OUTPUTS	OUTPUT INDICATORS	ANNUAL TARGETS (2025/26)	QUARTERLY TARGETS			
			Q1 Apr - Jun 2025	Q2 Jul - Sep 2025	Q3 Oct - Dec 2025	Q4 Jan - Mar 2026
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	Implement the FY25/26 Global Tourism Brand Campaign Execution Plan	Implement the FY25/26 Global Tourism Brand Campaign Execution Plan	Implement the FY25/26 Global Tourism Brand Campaign Execution Plan
			Implement a Global Tourism Brand campaign activity at Africa's Travel Indaba			

OUTPUTS	OUTPUT INDICATORS	ANNUAL TARGETS (2025/26)	QUARTERLY TARGETS			
			Q1 Apr - Jun 2025	Q2 Jul - Sep 2025	Q3 Oct - Dec 2025	Q4 Jan - Mar 2026
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	Consolidate the entity's social media platforms	Deploy unified brand messaging across the entity's social media platforms	Establish baseline for performance of social media platforms
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	Implement 1 communication activity to profile destination South Africa during Tourism Month	Implement 1 communication activities to profile destination South Africa at the G20 Summit	Implement 1 communication activity to profile destination South Africa at Meetings Africa
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	Implement 9 global public relations and communications activities to strengthen the destination brand	Implement 9 global public relations and communications activities to strengthen the destination brand	Implement 9 global public relations and communications activities to strengthen the destination brand
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	Execute the Travel Week Campaign	Execute the Summer Campaign	Execute the Easter Campaign
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	Implement 4 distribution channel initiatives in the domestic market	Implement 4 distribution channel initiatives in the domestic market	Implement 4 distribution channel initiatives in the domestic market
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	Execute 2 localised marketing campaigns in the Africa region	Execute 2 localised marketing campaigns in the Africa region	Leverage and conclude the localised marketing campaigns implemented in the Africa region

OUTPUTS	OUTPUT INDICATORS	ANNUAL TARGETS (2025/26)	QUARTERLY TARGETS			
			Q1 Apr - Jun 2025	Q2 Jul - Sep 2025	Q3 Oct - Dec 2025	Q4 Jan - Mar 2026
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	Implement 8 distribution channel initiatives in the Africa region	Implement 8 distribution channel initiatives in the Africa region	Implement 6 distribution channel initiatives in the Africa region
Localised marketing campaigns to increase demand in the Europe region	Number of localised marketing campaigns in the Europe region executed	Execute 4 localised marketing campaigns in the Europe region	Develop and approve 4 annual localised marketing campaign plans for the Europe region	Execute the localised marketing campaigns in the Europe region	Execute the localised marketing campaigns in the Europe region	Conclude the localised marketing campaigns in 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	Implement 10 distribution channel initiatives in the Europe region	Implement 8 distribution channel initiatives in the Europe region	Implement 6 distribution channel initiatives implemented in the Europe region
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	Execute the localised marketing campaigns in the Americas region	Execute the localised marketing campaigns in the Americas region	Execute and conclude the localised marketing campaigns in the Americas region
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	Implement 3 distribution channel initiatives in the Americas region	Implement 3 distribution channel initiatives in the Americas region	Implement 3 distribution channel initiatives in the Americas region
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	Execute the localised marketing campaigns in the Asia Australasia region	Execute the localised marketing campaigns in the Asia Australasia region	Execute and conclude the localised marketing campaigns in the Asia Australasia region
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	Implement 4 distribution channel initiatives in the Asia Australasia region	Implement 4 distribution channel initiatives in the Asia Australasia region	Implement 4 distribution channel initiatives in the Asia Australasia region

OUTPUTS	OUTPUT INDICATORS	ANNUAL TARGETS (2025/26)	QUARTERLY TARGETS			
			Q1 Apr - Jun 2025	Q2 Jul - Sep 2025	Q3 Oct - Dec 2025	Q4 Jan - Mar 2026
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	Execute the annual localised marketing campaign implementation plan in the Embassy Support markets	Execute the annual localised marketing campaign implementation plan in the Embassy Support markets	Execute and conclude the annual localised marketing campaign implementation plan in the Embassy Support markets
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	Implement 4 distribution channel initiatives in the Embassy Support markets	Implement 4 distribution channel initiatives in the Embassy Support markets	Implement 4 distribution channel initiatives in the Embassy Support markets

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

Leisure Tourism Marketing directly contributes to Outcome 1: Strengthened Market Position and Tourism Growth and Outcome 3: Insights-Led Sector Thought Leadership and Advocacy. The programme seeks to position South Africa as a leading tourism destination by implementing integrated global and domestic marketing strategies that resonate with diverse audiences. These efforts align with the Tourism Sector Master Plan and support key levers, such as building brand equity and increasing tourism demand, as well as contributing to the NDP Vision 2030 goals of economic growth, job creation, and poverty reduction.

A central focus of the programme is the Market Prioritisation and Investment Framework (MPIF), which segments source markets into defend, growth, and watch-list categories. This framework ensures resource allocation is optimised for maximum return on investment, guiding strategic decisions for marketing efforts. Defend markets will aim to maintain South Africa's existing market share, growth markets will be targeted for expansion opportunities, and watch-list markets will be monitored for emerging potential. The MPIF underpins the programme's global marketing campaigns, ensuring that efforts align with strategic priorities and deliver impactful results.

Global marketing initiatives will include unified branding, digital platforms, and public relations efforts to enhance South Africa's visibility and competitiveness. These campaigns will amplify South Africa's diverse attractions with regional initiatives across Africa, Europe, the Americas, Asia, and Embassy Support markets designed to drive sector recovery and stimulate demand. Partnerships with airlines, trade networks, and tour operators are critical enablers, ensuring seamless travel experiences, improved connectivity, and increased bookings from key markets.

The distribution channel initiatives are focused on improving South Africa's tourism market presence through collaborative mutual relationships with networks of traditional and non-traditional tourism companies, media, individuals, and direct marketing platforms. These relationships and platforms are activated through different marketing elements, including but not limited to destination training, digital toolkits, hosting, content creation, activations, information distribution, etc. These initiatives aim to increase travel demand and conversion ratios to drive tourism growth in international and domestic markets.

Domestic tourism initiatives and the summer, easter, and travel week campaigns will align with the District Development Model by promoting geographic spread and encouraging tourism in rural and underrepresented areas. These initiatives aim to diversify South Africa's tourism offerings and stimulate local economies, providing affordable and inclusive travel opportunities. A strong focus on empowering women, youth, and persons with disabilities will further the NDP's transformation and equity objectives, ensuring tourism growth benefits historically disadvantaged communities.

The programme's brand messaging and storytelling efforts will showcase South Africa's people, culture, and natural beauty, creating an emotional connection with travellers and reinforcing South Africa's position as a welcoming, accessible destination. Sustainability remains a priority, with campaigns emphasising eco-tourism, cultural preservation, and responsible travel practices. Inclusive marketing strategies will ensure diverse representation, enhancing South Africa's appeal to a wide range of travellers.

Key enablers for the programme include strong partnerships with provincial tourism authorities, trade and industry stakeholders, advanced digital tools for campaign tracking, and staff training to execute high-impact initiatives. The MPIF will provide the strategic direction for campaign prioritisation, ensuring resources are allocated effectively to defend and growth markets. Data-driven insights will further guide

campaign execution and monitoring. Risks, such as market volatility, reputational challenges, and fluctuating demand, will be mitigated through proactive public relations efforts, flexible marketing strategies, and a focus on high-impact campaigns tailored to market needs.

Through these initiatives, the programme aims to strengthen South Africa's market position, increase tourist arrivals and spending, and drive inclusive growth, ensuring the tourism sector continues to contribute meaningfully to the country's economic recovery and long-term sustainability.

1.3.5. PROGRAMME 3: RESOURCE CONSIDERATIONS

Programme 3: Leisure Tourism Marketing (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
Economic classification:							
Compensation of employees	123 929	107 579	106 886	109 214	163 641	171 212	179 075
Goods and services	773 568	827 442	725 559	696 580	682 438	714 013	746 803
Depreciation	3 238	1 091	-	-	-	-	-
Total expenses	900 735	936 112	832 445	805 794	846 079	885 224	925 877
Staff complement	72						

1.4. PROGRAMME 4: BUSINESS EVENTS

1.4.1. PROGRAMME PURPOSE

The Business Events Programme houses the South African National Convention Bureau (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: “A tourism sector that drives sustainable economic growth and job creation, ensures inclusive benefits, and promotes environmental and cultural sustainability”, the Business Events Programme delivers against the following outcomes and five-year targets in the Strategic Plan for 2025 to 2030:

Institutional Outcome	Outcome Indicator	Baseline (2024)	Five-Year Target (2030)
Outcome 1: Strengthened market position and tourism growth	International tourist arrivals	8.81 million as at March 2024: Leisure: 8.48 million MICE: 333.9 thousand	15 million: Leisure: 14.63 million MICE: 374.3 thousand
	International tourist spend	R95.1 billion as at March 2024: Leisure: R90.47 billion MICE: R4.63 billion	R115.2 billion: Leisure: R109.59 billion MICE: R5.61 billion
	Geographic spread of international tourist arrivals	9.7% as at March 2024	13.9%
	Domestic tourist trips	37.9 million as at March 2024	45.1 million
	Domestic tourist spend	R123 billion as at March 2024	R139.4 billion

Institutional Outcome	Outcome Indicator	Baseline (2024)	Five-Year Target (2030)
	Geographic spread of domestic tourist arrivals	3.3% as at March 2024	4.0%
	South Africa Leisure Brand Strength Index	45.6 as at March 2024	51
	Number of bids won (MICE)	227 as at March 2024	366
	Economic impact of bids won (MICE)	R3.9 billion as at March 2024	R6.3 billion
3. Insights-led sector advocacy and thought leadership	Satisfaction Score with South African Tourism's engagement	3.5 as at March 2024	4

The FY25/26 performance plan of Programme 4 is reflected in the log frame tables below:

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

OUTCOMES	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
Outcome 1: Strengthened market position and tourism growth	Increased economic benefits and job creation through bidding and hosting of events	Meetings Africa hosted	Meetings Africa was hosted	Meetings Africa hosted	Meetings Africa reimagined	Meetings Africa 2025 hosted	Host Meetings Africa 2026	Host Meetings Africa 2027	Host Meetings Africa 2028
		Africa's Travel Indaba hosted	(No Africa's Travel Indaba in 2021)	Africa's Travel Indaba was hosted	Africa's Travel Indaba reimagined was hosted	Africa's Travel Indaba 2024 hosted	Host Africa's Travel Indaba 2025	Host Africa's Travel Indaba 2026	Host Africa's Travel Indaba 2027
		Number of bid submissions for the MICE industry supported	81	95	95	95	Support 105 bid submissions for the MICE industry	Support 115 bid submissions for the MICE industry	Support 125 bid submissions for the MICE industry
		Number of business events hosted in VTSDs	New indicator	3	5	5	Host 10 business events in VTSDs	Host 15 business events in VTSDs	Host 20 business events in VTSDs
	Enhanced sustainability (economic, environmental, social) of South African Tourism owned platforms	Business model for the sustainability of South African Tourism owned strategic platforms implemented	N/A	N/A	N/A	New indicator	Implement a business model for the sustainability of South African Tourism owned strategic platforms	Implement the business model for the sustainability of South African Tourism owned strategic platforms	Review the business model for the sustainability of South African Tourism owned strategic platforms
	Promotion of South African tourism products at global platforms	Number of South African tourism products promoted at global market access platforms	N/A	N/A	N/A	New indicator	180 South African tourism products promoted at global market access platforms	190 South African tourism products promoted at global market access platforms	200 South African tourism products promoted at global market access platforms

OUTCOMES	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
	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	1 domestic B2B campaign implemented	1 domestic B2B campaign implemented	1 domestic B2B campaign implemented	1 domestic B2B campaign implemented	Execute 1 domestic B2B brand campaign	Execute 1 domestic B2B brand campaign	Execute 1 domestic B2B brand campaign
			1 global B2B campaign implemented	1 global B2B campaign implemented	1 global B2B campaign implemented	1 global B2B campaign implemented	Execute 1 global B2B brand campaign	Execute 1 global B2B brand campaign	Execute 1 global B2B brand campaign
Outcome 3: Insights-led sector thought leadership and advocacy	MICE sector capacitated for future growth	Number of assessments to demonstrate the economic impact of bids awarded conducted	N/A	New indicator	4 bidding impact reports	2 bi-annual bidding impact reports	Conduct 2 assessments to demonstrate the economic impact of bids awarded	Conduct 2 assessments to demonstrate the economic impact of bids awarded	Conduct 2 assessments to demonstrate the economic impact of bids awarded

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

OUTPUTS	OUTPUT INDICATORS	ANNUAL TARGETS (2025/26)	QUARTERLY TARGETS			
			Q1 Apr - Jun 2025	Q2 Jul - Sep 2025	Q3 Oct - Dec 2025	Q4 Jan - Mar 2026
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	Develop the project plan with key performance indicators to measure the economic impact of Meetings Africa 2026	Monitor key performance indicators to measure the economic impact of Meetings Africa 2026	Monitor key performance indicators to measure the economic impact of Meetings Africa 2026
						Host Meetings Africa 2026
	Africa's Travel Indaba hosted	Host Africa's Travel Indaba 2025	Host Africa's Travel Indaba 2025	Conduct the economic impact briefing for Africa's Travel Indaba 2025	Develop the project plan with key performance indicators to measure the	Monitor key performance indicators to measure the

OUTPUTS	OUTPUT INDICATORS	ANNUAL TARGETS (2025/26)	QUARTERLY TARGETS			
			Q1 Apr - Jun 2025	Q2 Jul - Sep 2025	Q3 Oct - Dec 2025	Q4 Jan - Mar 2026
					economic impact of Africa's Travel Indaba 2026	economic impact of Africa's Travel Indaba 2026
	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	Support 40 bid submissions for the MICE industry	Support 13 bid submissions for the MICE industry	Support 12 bid submissions for the MICE industry
	Number of business events hosted in VTSDs	Host 10 business events in VTSDs	Host 3 business events in VTSDs	Host 3 business events in VTSDs	Host 2 business events in VTSDs	Host 2 business events in VTSDs
Enhanced sustainability (economic, environmental, social) of South African Tourism owned platforms	Business model for the growth and sustainability of South African Tourism owned strategic platforms implemented	Implement a business model for the growth and sustainability of South African Tourism owned strategic platforms	-	Develop the business model for the growth and sustainability of South African Tourism owned strategic platforms	Pilot the business model for the growth and sustainability of South African Tourism owned strategic platforms	Implement the business model for the growth and sustainability of South African Tourism owned strategic platforms
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	-	90 South African tourism products promoted at global market access platforms	50 South African tourism products promoted at global market access platforms
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	Execute the domestic B2B brand campaign	Execute the domestic B2B brand campaign	Execute the domestic B2B brand campaign
		Execute 1 global B2B brand campaign	Develop and approve the global B2B brand campaign	Execute the global B2B brand campaign	Execute the global B2B brand campaign	Execute the global B2B brand campaign
MICE sector capacitated for future growth	Number of assessments to demonstrate the economic impact of bids awarded conducted	Conduct 2 assessments to demonstrate the economic impact of bids awarded	-	Conduct 1 assessment to demonstrate the economic impact of bids awarded	-	Conduct 1 assessment to demonstrate the economic impact of bids awarded

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

The Business Events Programme directly contributes to Outcome 1: Strengthened Market Position and Tourism Growth and Outcome 3: Insights-Led Sector Thought Leadership and Advocacy by positioning South Africa as a premier destination for MICE. The programme plays a pivotal role in driving business tourism growth, stimulating economic activity and elevating South Africa's global competitiveness in the business events sector.

At the heart of this programme is the SANCB, which spearheads efforts to attract international business events to South Africa. The SANCB's work includes supporting bid submissions, coordinating strategic events, and collaborating with stakeholders to enhance South Africa's standing as a preferred MICE destination. Its efforts are integral to building the country's reputation and driving sustainable growth in the business events sector.

Strategic platforms, such as Meetings Africa and Africa's Travel Indaba, showcase South Africa's capacity to host world-class business events and provide essential market access for local products and services. These platforms underpin the country's reputation as a leading business events destination while contributing to the broader objectives of reigniting demand and fostering sector recovery, as outlined in the Tourism Sector Master Plan.

Capacity is central to this programme's scalability. The current targets reflect the human and financial resources available to South African Tourism and the SANCB. If resources are expanded, the scope of activities and the associated targets can be elevated, enhancing South Africa's ability to compete more effectively on the global stage. To inform future strategies, a comprehensive review of the strategic platforms South African Tourism attends is underway. This review, expected to be finalised early in FY2025/26, will assess the relevance and value of these platforms, shaping their role in business events strategy going forward.

Bid submissions and toolkits remain a cornerstone of this programme. With 105 bid submissions planned for FY2025/26 and a streamlined bidding toolkit in place, South Africa will strengthen its competitive edge in the global MICE market. Bi-annual business events bidding impact reports will provide critical insights into the effectiveness of these initiatives, ensuring that strategies remain agile and impactful.

Inclusivity is prioritised through villages, townships and small dorpiés (VTSDs) events, with at least 10 events planned in underrepresented areas. These efforts align with the District Development Model, promoting equitable regional development and fostering economic growth in historically marginalised communities. By ensuring that business events directly benefit these areas, South African Tourism contributes to transformation goals.

Sustainability and inclusivity are embedded in the programme's design, with an emphasis on balancing economic benefits with environmental stewardship and community engagement. Business events provide an opportunity to elevate the participation of women, youth, and persons with disabilities across the value chain, ensuring broad-based benefits.

Key enablers include strategic partnerships with industry stakeholders, collaboration with provincial tourism authorities, and the use of advanced digital tools for event management and marketing. These partnerships enhance alignment with local and national objectives, while robust data analytics drive efficient planning and stakeholder engagement. The completion of the strategic platform review will ensure that resources are focused on high-value activities, further amplifying South Africa's unique value proposition in the MICE sector.

Risks, such as global competition, infrastructure challenges, and resource constraints, are mitigated through strategic prioritisation, proactive stakeholder engagement, and efforts to position South Africa as a unique and competitive destination. With scalable targets and a focus on capacity-building, the Business Events Programme and the SANCB will continue to drive economic recovery, strengthen South Africa's market position, and foster inclusive growth across the tourism sector.

1.4.5. PROGRAMME 4: RESOURCE CONSIDERATIONS

Programme 4: Business Events (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
Economic classification:							
Compensation of employees	13 347	17 619	18 338	16 046	21 175	22 154	23 172
Goods and Services	74 912	284 242	308 953	211 147	279 782	292 727	306 170
Total expenses	88 259	301 861	327 291	227 193	300 957	314 881	329 342
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	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> ▪ To seek new offerings, products, and operators to package in exciting itineraries for the use of South African Tourism's 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	<ul style="list-style-type: none"> ▪ The enhancement of Global Trade will focus on initiatives that support local and internal trade and distribution channels, as well as other interested stakeholders to better sell South Africa. ▪ The Tourism Route Development Marketing Plan (TRDMP) aims to maximise South Africa's domestic and international route development and maintenance through various marketing initiatives that increase market volumes and brand awareness to ensure sustained connectivity.

In contributing towards the South African Tourism impact of: "A tourism sector that drives sustainable economic growth and job creation, ensures inclusive benefits, and promotes environmental and cultural sustainability", the Tourist Experience Programme delivers against the following outcomes and five-year targets in the Strategic Plan for 2025 to 2030:

Institutional Outcome	Outcome Indicator	Baseline (2024)	Five-Year Target (2030)
Outcome 1: Strengthened market position and tourism growth	South Africa Leisure Brand Strength Index	45.6 as at March 2024	51

Institutional Outcome	Outcome Indicator	Baseline (2024)	Five-Year Target (2030)
Outcome 2: Enhanced visitor experience and responsible tourism offerings	Tourist Satisfaction Rating	4.6 as at March 2024	4.8

The FY25/26 performance plan of Programme 5 is reflected in the log frame tables below:

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

OUTCOMES	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
Outcome 2: Enhanced visitor experience and responsible tourism offerings	Enhanced visitor experience through quality assurance of tourism offerings	Number of graded establishments	3 605 graded establishments	4 959 graded establishments	4 668 graded establishments	5 000 graded establishments	4 500 graded establishments	4 700 graded establishments	5 000 graded establishments
	Product development and job creation through basic quality verification	Basic Quality Verification (BQV) Programme implemented	Eastern Cape pilot programme rollout	KwaZulu-Natal programme rollout	KwaZulu-Natal programme rollout	Commencement of Gauteng BQV Programme	Complete the BQV Programme in Gauteng	-	-
Outcome 1: Strengthened market position and tourism growth	Global trade equipped to better sell South Africa	Number of initiatives to equip global trade to better sell South Africa implemented	N/A	New indicator	FY2023/24 Global Trade Plan implemented	FY2024/25 Global Trade Plan implemented	Implement 2 initiatives to equip global trade to better sell South Africa	Implement 2 initiatives to equip global trade to better sell South Africa	Implement 2 initiatives to equip global trade to better sell South Africa
	Promotion of increased air access for destination South Africa	Number of initiatives to support air access through the Tourism Route Development Marketing Plan implemented	N/A	N/A	N/A	New indicator	Implement 4 initiatives to support air access through the Tourism Route Development Marketing Plan	Implement 4 initiatives to support air access through the Tourism Route Development Marketing Plan	Implement 4 initiatives to support air access through the Tourism Route Development Marketing Plan

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

OUTPUTS	OUTPUT INDICATORS	ANNUAL TARGETS (2025/26)	QUARTERLY TARGETS			
			Q1 Apr - Jun 2025	Q2 Jul - Sep 2025	Q3 Oct - Dec 2025	Q4 Jan - Mar 2026
Enhanced visitor experience through quality assurance of tourism establishments	Number of graded establishments	4 500 graded establishments	1 125 graded establishments	2 250 graded establishments	3 375 graded establishments	4 500 graded establishments
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	Implement the BQV Programme in Gauteng	Implement the BQV Programme in Gauteng	Complete the BQV Programme in Gauteng
Global trade equipped to better sell South Africa	Number of initiatives to equip global trade to better sell South Africa implemented	Implement 2 initiatives to equip global trade to better sell South Africa	-	Implement 1 initiative to equip global trade to better sell South Africa	-	Implement 1 initiative to equip global trade to better sell South Africa
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	Implement 1 initiative 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	Implement 1 initiative to support air access through the Tourism Route Development Marketing Plan

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

The Tourist Experience Programme directly contributes to Outcome 1: ensuring high-quality services, seamless travel experiences, and stronger global trade relations; and Outcome 2: Enhanced Visitor Experience and Responsible Tourism Offerings.

Quality assurance efforts, led by the TGCSA, aim to grade 4 500 establishments in FY25/26. This seeks to ensure that South Africa maintains a strong reputation for quality and consistency, building trust among visitors and travel trade partners.

Planned visitor experience enhancements include implementing key initiatives of the approved Year Two Tourism Value Chain Strategy Roadmap, which includes value chain interventions such as welcome training initiatives, activations at ports of entry, and strategic partnerships. These initiatives reflect South Africa's commitment to warm hospitality and efficient service delivery, contributing to higher tourist satisfaction and repeat travel.

Global trade initiatives are two-fold in that they will cover and enhance collaboration with the distribution channel as well as drive the Tourism Route Development Marketing Plan. Collaboration with the distribution channel aims to improve market access, increase destination knowledge, strengthen brand appeal, and support trade partners to optimally sell the destination. The Tourism Route Development Marketing Plan aims to enhance access to South Africa through targeted initiatives: increasing connectivity and reducing travel barriers. On the latter, SA Tourism will also have quarterly engagements with relevant industry stakeholders to assist the formulation of the Tourism Route Development Marketing mechanism. Together, these efforts will promote South Africa as a lucrative travel destination to sell and add to the route network.

Sustainability and inclusivity remain central to the programme's objectives. Responsible tourism practices, such as sustainable route development and service enhancements seek to promote responsible consumption and production. Inclusive marketing and development initiatives seek to ensure that women, youth, and persons with disabilities benefit from the sector's growth.

Enablers include partnerships with industry stakeholders, technology for tracking visitor feedback, and continuous improvement processes. Collaboration with provincial tourism authorities seeks to promote geographic spread and inclusivity.

Risks such as delays in grading establishments, challenges in securing trade collaborations, and infrastructure constraints are mitigated through proactive planning, stakeholder engagement, and prioritisation of high-impact interventions. Sustainability and inclusivity remain central to the programme's objectives, ensuring that growth benefits all segments of society while promoting responsible tourism practices.

1.5.5. PROGRAMME 5: RESOURCE CONSIDERATIONS

Programme 5: Tourist Experience (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
Economic classification:							
Compensation of employees	18 069	17 477	18 500	19 141	21 220	22 202	23 221
Goods and services	31 078	57 155	56 006	73 307	61 780	64 638	67 607
Total expenses	49 147	74 633	74 506	92 448	83 000	86 840	90 828
Staff complement	23						

2. CONSOLIDATED FINANCIAL PLAN AND 2025/26 MTEF BUDGET ESTIMATES

2.1. PROJECTED REVENUE FOR 2025/26 MTEF

Revenue	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
(R'000)	Audited	Audited	Audited	Approved	Estimate	Estimate	Estimate
DT allocation	1 297 038	1 329 206	1 289 739	1 243 555	1 300 207	1 359 666	1 421 151
TOMSA levies	58 839	115 440	133 544	56 395	140 221	147 232	154 594
Indaba Meetings Africa and other exhibitions	16 841	97 467	124 613	35 927	37 652	39 460	41 433
Grading fees	15 034	25 056	15 233	13 804	14 467	15 190	15 950
Sundry revenue	4 788	17 606	13 465	29 881	31 316	32 819	34 459
TOTAL	1 392 540	1 584 775	1 576 594	1 379 562	1 523 863	1 594 367	1 667 587

2.2. PROJECTED EXPENDITURE FOR 2025/26 MTEF

Name of the Programme		2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
		Audited	Audited	Audited	Approved Budget	Estimate	Estimate	Estimate
		(R'000)	(R'000)	(R'000)	(R'000)	(R'000)	(R'000)	(R'000)
1	Corporate Support	154 768	212 278	182 774	182 398	203 595	213 015	222 797
2	Business Enablement	80 985	70 543	78 452	71 729	90 232	94 407	98 742
3	Leisure Tourism Marketing	900 735	936 112	832 445	805 794	846 079	885 224	925 877
4	Business Events	88 259	301 861	327 291	227 193	300 957	314 881	329 342
5	Tourist Experience	49 147	74 633	74 506	92 448	83 000	86 840	90 828
TOTAL		1 273 894	1 595 426	1 495 468	1 379 562	1 523 863	1 594 367	1 667 587

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

The strategic risks identified in the Strategic Plan for 2025-2030 are as follows:

Outcome	Key Risks	Risk Mitigations
1. Strengthened market position and tourism growth	<ul style="list-style-type: none"> ▪ Global economic volatility: Economic downturns, inflation, and currency fluctuations may impact tourism spend and travel budgets, affecting growth targets. ▪ Limited budget and resources: Budget constraints and resource limitations may hinder effective marketing and brand-building efforts. ▪ Increased competition: Competing destinations, both in Africa and globally, are enhancing their tourism offerings, creating intense competition for market share. ▪ Travel barriers: Air connectivity issues, travel restrictions, and complex visa processes may reduce tourist arrivals from key markets. 	<ul style="list-style-type: none"> ▪ Use the MPIF Framework to prioritise high-impact marketing activities in defend and growth markets, ensuring efficient use of limited resources. ▪ Emphasise South Africa's unique tourism experiences, leveraging sustainability and community-based tourism as differentiators. ▪ Continuously innovate brand messaging to maintain market appeal. ▪ Work closely with airlines to enhance direct connectivity. ▪ Advocate for policy reforms to streamline visa processes and improve ease of travel to South Africa.
2. Enhanced visitor experience and responsible tourism offerings	<ul style="list-style-type: none"> ▪ Safety and security concerns: Issues around crime, social unrest, and health risks could negatively impact the visitor experience and South Africa's brand image. ▪ Operational inefficiencies: Delays in service delivery, inconsistent tourism standards, and poor infrastructure may reduce visitor satisfaction and competitiveness. ▪ Limited capacity for responsible tourism initiatives: Insufficient investment in sustainable and community-based tourism can limit the appeal for eco-conscious travellers and responsible tourism growth. 	<ul style="list-style-type: none"> ▪ Implement proactive communication strategies to manage perceptions and promote positive narratives. ▪ Improve tourism grading criteria through the TGCSA and ensure consistent service standards across the sector. ▪ Support responsible tourism practices for local businesses. ▪ Promote experiences that align with global sustainability trends, like nature reserves, cultural heritage sites, and eco-friendly accommodations.
3. Insights-led sector thought leadership and advocacy	<ul style="list-style-type: none"> ▪ Data gaps and lack of timely market insights: Insufficient or outdated data on market trends, visitor behaviour, and sector performance may limit South African 	<ul style="list-style-type: none"> ▪ Implement advanced data management systems for real-time analytics, improving market insights and enabling agile decision-making.

Outcome	Key Risks	Risk Mitigations
	<p>Tourism's ability to make informed decisions and advocate effectively.</p> <ul style="list-style-type: none"> ▪ Fragmented stakeholder coordination: Inconsistent collaboration and communication among stakeholders, including government departments and private partners, may hinder policy advocacy and market growth. 	<ul style="list-style-type: none"> ▪ Develop partnerships with research institutions and data providers for comprehensive sector intelligence. ▪ Establish regular communication forums and collaborative platforms to ensure coherent brand advocacy.
4. Organisational excellence and a high-performance culture	<ul style="list-style-type: none"> ▪ Skills gaps and talent retention challenges: Insufficient skills in key areas, such as digital marketing, technology use, and data analytics, may hinder organisational performance. Retaining high-performing staff can be difficult in a competitive talent market. ▪ Governance and process inefficiencies: Outdated internal systems, fragmented workflows, and delayed decision-making may affect operational efficiency and delivery against strategic objectives. ▪ Limited technological integration: Low adoption of digital tools and outdated ICT infrastructure limit operational capacity and hinder effective service delivery. 	<ul style="list-style-type: none"> ▪ Implement comprehensive training programmes for staff development in key skills areas. ▪ Develop a culture of recognition, inclusion, and development to enhance staff retention and build a diverse talent pipeline. ▪ Review and optimise internal processes to enhance agility and efficiency. ▪ Develop clear performance management systems and implement best practices in governance. ▪ Invest in upgrading ICT systems and integrating digital solutions across all operations to improve efficiency and enhance service delivery. ▪ Adopt digital collaboration tools and data-driven decision-making platforms to build a high-performance culture. ▪ Review and optimise internal processes to enhance agility and efficiency.

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

1. PROGRAMME 1: CORPORATE SUPPORT

Indicator title	Percentage of valid internal and external audit recommendations implemented
Definition	Valid audit recommendations that are provided during audits by internal and external auditors, as agreed to for the reporting period, must be implemented. The validity of recommendations is determined by whether there are supporting documents. Closing all audit recommendations contributes to an enhanced internal control environment and sound governance.
Source of data	<ul style="list-style-type: none"> Quarterly Internal Audit Reports. Quarterly Audit Tracker.
Method of calculation or assessment	Number of recommendations closed divided by the total number of recommendations issued, expressed as a percentage.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly Internal Audit Reports reflect progress on the planned quarterly targets, and were approved by the Chief Audit Executive, or the assigned delegation of authority (DOA), within three working days after the end of each quarter. Quarterly Audit Tracker, as the portfolio of evidence, correlates with the progress reported in the Quarterly Audit Reports. The Quarterly Audit Tracker will be available within three working days after the end of each quarter.
Assumptions	Management executes the internal and external audit recommendations as per the agreed upon 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	Achievement of the target as planned.
Indicator responsibility	Chief Audit Executive.

Indicator title	Annual Operation Clean Audit Programme implemented
Definition	South African Tourism will implement the Operation Clean Audit (OPCA) Programme annually, that seeks to improve the entity's audit outcome and sound governance. This programme 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	<ul style="list-style-type: none"> FY25/26 Operation Clean Audit Programme.

	<ul style="list-style-type: none"> Quarterly OPCA Reports.
Method of calculation or assessment	Assess the progress on the implementation of the FY25/26 Operation Clean Audit Programme and planned quarterly targets.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly OPCA Reports outline progress against the FY25/26 Operation Clean Audit Programme and the planned quarterly targets and were approved by the CFO, or the assigned DOA, within three working days after the end of each quarter. The Quarterly OPCA Reports include a portfolio of evidence which correlates with the progress reported in the Quarterly OPCA Reports.
Assumptions	Management implements the Operation Clean Audit Programme timeously.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Financial Officer

Indicator title	Number of initiatives that promote compliance, integrity and ethical conduct in the procurement of goods and services implemented
Definition	The implementation of initiatives that promote compliance, integrity and ethical conduct in the procurement of goods and services, as guided by Section 57 of the PFMA.
Source of data	Quarterly Finance and SCM Reports.
Method of calculation or assessment	Simple count of the number of initiatives implemented to promote compliance, integrity and ethical conduct in SCM (PFMA Section 57).
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly Finance and SCM Reports outline the progress made on the planned quarterly targets to promote integrity and ethical conduct in SCM and were approved by the CFO, or the assigned DOA, within three working days after the end of each quarter. The Quarterly Finance and SCM Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	Resources available for implementation of the initiatives.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.

Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Financial Officer.

Indicator title	Staff Engagement Survey Two-Year 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 staff engagement surveys are used by South African Tourism to identify areas for improvement and develop strategies to increase staff engagement, and morale. On the basis of the survey report, an improvement plan is developed that will be implemented over a two-year period.
Source of data	<ul style="list-style-type: none"> FY23/24 Staff Engagement Survey Report. Staff Engagement Survey Two-Year Improvement Plan. Quarterly Human Capital Reports. FY25/26 Staff Engagement Survey Report.
Method of calculation or assessment	Assess progress on the planned quarterly targets.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly Human Capital Reports reflect progress on the planned quarterly targets, and were approved by the Chief Operating Officer, or the assigned DOA, within three working days after the end of each quarter. The Quarterly Human Capital Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	Budget is available to implement the planned initiatives.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Operating Officer.

Indicator title	Reviewed organisational design implemented
Definition	The reviewed organisational design refers to the alignment of South African Tourism's operating model, organisational structure, roles, reporting lines, and organisational capacity to the approved corporate strategy. This process involves reviewing the operating model, reviewing the organisational structure, and implementing the changes necessary to improve efficiency, align resources to strategic priorities, and enhance performance across all programmes.

Source of data	<ul style="list-style-type: none"> Quarterly Human Capital Reports. Approved reviewed operating model. Approved reviewed organisational structure.
Method of calculation or assessment	Assess progress on the planned quarterly targets.
Means of verification	<p>Verify the:</p> <ul style="list-style-type: none"> Quarterly Human Capital Reports outline progress towards the planned quarterly targets, and were approved by the Chief Operations Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly Human Capital Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Adequate budget and resources are allocated to support the design and implementation process. Governance structures approve the reviewed operating model and organisational structure without significant delays. All stakeholders support and cooperate with the review and implementation process.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Operating Officer.

Indicator title	Productivity Matrix established
Definition	The Productivity Matrix is a structured tool designed to measure and evaluate operational efficiency within South African Tourism. It consolidates key metrics related to resource utilisation, output delivery, and organisational performance, enabling the identification of baseline performance levels for productivity. Establishing the baseline is a foundational step for tracking, evaluating, and improving productivity over time, and creating a high performance culture within the organisation.
Source of data	<ul style="list-style-type: none"> Quarter 1 and Quarter 2 Human Capital Reports. Productivity Matrix. Productivity Matrix Baseline Report.
Method of calculation or assessment	Assess progress on the planned quarterly targets.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarters 1 and 2 Human Capital Reports outline progress towards the planned quarterly targets, and were approved by the Chief Operations Officer, or the assigned DOA, within three working days after the end of the quarter.

	<ul style="list-style-type: none"> The Quarterly Human Capital Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Accurate and complete data for key productivity dimensions will be available for analysis. Internal processes will support the collection and validation of productivity-related data.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly (Q1 and Q2).
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Operating Officer.

2. PROGRAMME 2: BUSINESS ENABLEMENT

Indicator title	Number of tourism information tracking surveys conducted
Definition	<p>Tourism information tracking surveys provide quality tourism information for planning and organisational decision-making purposes. The three tourism information tracking surveys that will be undertaken by South African Tourism are the:</p> <ul style="list-style-type: none"> Departure Survey Domestic Tourism Survey Business Events Brand Equity Survey <p>The surveys are evidenced through fieldwork reports that are produced in different quarters.</p>
Source of data	<ul style="list-style-type: none"> Departure Survey fieldwork reports produced each quarter. Domestic Tourism Survey fieldwork reports produced each quarter. Business Events Brand Equity Survey fieldwork reports produced in Quarters 2 and 4. Quarterly Analytics and Insights Reports.
Method of calculation or assessment	Simple count of the number of tourism information tracking surveys conducted.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly Analytics and Insights Reports outline progress made on the planned quarterly targets and were approved by the Chief Strategy Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly Analytics and Insights Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
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	Achievement of the target as planned.
Indicator responsibility	Chief Strategy Officer.

Indicator title	Sentiment Index established
Definition	A Country Tourism Sentiment Index measures the level of user satisfaction from digital traces. Tracking the Sentiment Index will enable South African Tourism to communicate tourist perceptions of South Africa as a destination.
Source of data	<ul style="list-style-type: none"> ▪ Sentiment Framework. ▪ Sentiment Calculation Model. ▪ Document outlining sentiment by product type. ▪ Baseline for the Sentiment Index for South Africa. ▪ Quarterly Analytics and Insights Reports.
Method of calculation or assessment	Assess progress against the planned quarterly targets.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> ▪ Quarterly Analytics and Insights Reports outline progress made on the planned quarterly targets and were approved by the Chief Strategy Officer, or the assigned DOA, within three working days after the end of the quarter. ▪ The Quarterly Analytics and Insights Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	Sentiment data is available and may be used to create a Sentiment Index.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Strategy Officer.

Indicator title	Number of stakeholder engagement activities implemented
Definition	This indicator tracks the number of stakeholder engagement activities implemented by South African Tourism to promote a whole-of-tourism approach and public and private sector collaboration. Engagement activities may include strategic dialogues,

	formal recognition of stakeholder contributions, implementation of partnership agreements, forums, and collaborative initiatives with public and private sector partners in the tourism industry.
Source of data	Quarterly Stakeholder Management Reports.
Method of calculation or assessment	Simple count of the number of stakeholder engagement activities implemented to promote public and private sector collaboration.
Means of verification	Verify that the: <ul style="list-style-type: none"> Quarterly Stakeholder Management Reports detail progress against the planned quarterly targets and were approved by the CEO, or the assigned DOA, within three working days of the end of the quarter. The Quarterly Stakeholder Management Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Sufficient budget. Stakeholder participation and buy-in are secured for all planned activities. MOUs are actively implemented. Internal resources. Timely delivery of engagement activities.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Executive Officer.

Indicator title	Number of digital platforms 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. Digital platforms are essential to driving this digital outlook. A digital platform is an online system that allows users of the system to interact and exchange information. For each year of implementation, a document will be prepared that outlines the phased approach to the digital platform that will be developed and implemented. Informed by this Framework, initiatives to optimise digital platforms will be implemented.
Source of data	<ul style="list-style-type: none"> Document outlining the phased approach to the development and implementation of the traveller application digital platform. Quarterly DigiTech Reports.
Method of calculation or assessment	Simple count of the number of digital platforms implemented.
Means of verification	Verify that the:

	<ul style="list-style-type: none"> Quarterly DigiTech Reports outline progress made on the planned quarterly targets and were approved by the Chief Marketing Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly DigiTech Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Support by business units for the development and implementation of the traveller application digital platform. 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	Achievement of the target as planned.
Indicator responsibility	Chief Marketing Officer.

3. PROGRAMME 3: LEISURE TOURISM MARKETING

Indicator title	Global Tourism Brand Campaign implemented
Definition	The Global Tourism Brand Campaign specifically targeting the MPIF defined global markets will be developed and implemented through an annual execution plan. The campaign aims to create demand for destination South Africa's tourist offerings.
Source of data	<ul style="list-style-type: none"> FY25/26 Global Tourism Brand Campaign Execution Plan. Quarterly Brand and Marketing Reports.
Method of calculation or assessment	Assess progress towards the implementation of the FY25/26 Global Tourism Brand Campaign and the planned quarterly targets on a quarterly basis.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly Brand and Marketing Reports detail progress against the FY25/26 Global Tourism Brand Campaign Plan and the planned quarterly targets and were approved by the Chief Marketing Officer, or the assigned DOA, within three working days after the end of each quarter. The Quarterly Brand and Marketing Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> All approvals are received timeously as per South African Tourism's Delegation of Authority. Sufficient budget is 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 due to 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	Achievement of the target as planned.
Indicator responsibility	Chief Marketing Officer.

Indicator title	Integrated Digital Marketing Strategy implemented
Definition	The Integrated Digital Marketing Strategy will be developed for implementation in FY25/26. The strategy will focus on supporting both global and domestic marketing strategies that promote South Africa's tourism offerings and showcase exceptional tourism experiences, so as to create demand and promote brand visibility.
Source of data	<ul style="list-style-type: none"> Integrated Digital Marketing Strategy. Quarterly Brand and Marketing Reports.
Method of calculation or assessment	Assess progress towards implementation of the Integrated Digital Marketing Strategy and the planned quarterly targets on a quarterly basis.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly Brand and Marketing Reports detail progress against the Integrated Digital Marketing Strategy and the planned quarterly targets and were approved by the Chief Marketing Officer, or the assigned DOA, within three working days of the end of each quarter. The Quarterly Brand and Marketing Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Sufficient budget is available. No restrictions or business interruption due to 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	Achievement of the target as planned.
Indicator responsibility	Chief Marketing Officer.

Indicator title	Number of communication activities to profile destination South Africa through strategic events implemented
Definition	A range of communication activities will be implemented to profile destination South Africa through strategic events. These communication activities will take various forms including media engagement and thought leadership.

Source of data	Quarterly Global PR and Communications Reports.
Method of calculation or assessment	Simple count of the number of activities implemented to profile destination South Africa, through strategic events.
Means of verification	Verify that the: <ul style="list-style-type: none"> Quarterly Global PR and Communications Reports detail progress against the planned quarterly targets and were approved by the Chief Marketing Officer, or the assigned DOA, within three working days after the end of each quarter. The Quarterly Global PR and Communications Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	Sufficient budget is allocated.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Marketing Officer.

Indicator title	Number of global public relations and communications activities to strengthen the destination brand implemented
Definition	The tourism sector's potential to drive economic growth and create employment opportunities has been widely acknowledged. In this context, South African Tourism will implement a Global PR and Communications activities which seeks to promote destination South Africa's exceptional tourism offerings. These destination brand activities will ensure that correct, relevant, always-on, content is produced to drive South Africa's uniqueness as an appealing leisure and business events destination.
Source of data	Quarterly Global PR and Communications Reports.
Method of calculation or assessment	Simple count of the number of global public relations and communications activities to strengthen the destination brand implemented.
Means of verification	Verify that the: <ul style="list-style-type: none"> Quarterly Global PR and Communications Reports detail progress against the planned quarterly targets and were approved by the Chief Marketing Officer, or the assigned DOA, within three working days of the end of each quarter. The Quarterly Global PR and Communications Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Sufficient budget is 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 due to 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	Achievement of the target as planned.
Indicator responsibility	Chief Marketing Officer.

Indicator title	Number of domestic leisure tourism campaigns executed
Definition	The development and implementation of localised leisure marketing campaigns that have 360° integrated elements of the marketing mix, aimed at increasing demand for domestic tourism.
Source of data	<ul style="list-style-type: none"> Annual Campaign Implementation Plan. Quarterly Campaign Reports. Campaign Close-Out Reports.
Method of calculation or assessment	Simple count of the number of domestic leisure tourism campaigns executed
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly Reports for the Domestic Region outlining progress against the Annual Campaign Implementation Plan and the planned quarterly targets, and were approved by the Chief Operations Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly Reports for the Domestic Region include a portfolio of evidence which correlates with the progress reported in the quarterly reports. Close-Out Reports were approved, within 60 days after the end of the campaigns.
Assumptions	<ul style="list-style-type: none"> Sufficient budget is allocated. Working technology and related systems. Unrestricted market conditions, e.g., COVID-19-related travel restrictions.
Disaggregation of beneficiaries (where applicable)	<ul style="list-style-type: none"> 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)	Promote geographic spread across all provinces.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Operating Officer.

Indicator title	Number of distribution channel initiatives in the domestic market implemented
Definition	Inspire our segments to “get out of the house” and take more day and holiday trips NOW by showcasing a variety of affordable, desired experiences in a clear and accessible manner, that are underlined by personal safety message. Create opportunities for the distribution channel to access the domestic market to enable them to drive, promote and sell South African travel effectively as preferred by consumers, thereby increasing conversion.
Source of data	Quarterly Reports for the Domestic Region.
Method of calculation or assessment	Simple count of the number of distribution channel initiatives implemented in the domestic market.
Means of verification	Verify that the: <ul style="list-style-type: none"> Quarterly Reports for the Domestic Region outlining progress against the planned quarterly targets and is submitted three working days after the end of each quarter, approved by the Chief Operations Officer, or the assigned DOA. The Quarterly Reports for the Domestic Region include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Allocated budget. Tourism trade participation. Operational website.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Promote geographic spread across all provinces.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Operating Officer.

Indicator title	Number of localised marketing campaigns in the Africa region executed
Definition	South African Tourism's Global Tourism Marketing Campaign for the destination is aligned with the Africa region's business objectives, market insights, and the nuances of the specific markets for better resonance. This is referred to as a localised campaign for a market. Localisation could adopt the entire global campaign or selected elements of the global campaign. 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. The localised campaign is then executed to increase demand in the identified African markets.
Source of data	<ul style="list-style-type: none"> Annual Africa Localised Campaign Implementation Plan. Quarterly Campaign Reports. Campaign Close-Out Reports.
Method of calculation or assessment	Simple count of the number of localised marketing campaigns executed in the Africa region.

Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly Reports for the Africa Region outlining progress against the Annual Africa Localised Campaign Implementation Plan and the planned quarterly targets, and were approved by the Chief Operations Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly Reports for the Africa Region include a portfolio of evidence which correlates with the progress reported in the quarterly reports. Campaign Close-Out Reports were approved by the Chief Operations Officer, or the assigned DOA, within 60 days after the end of the campaigns.
Assumptions	<ul style="list-style-type: none"> Sufficient budget. Working technology and related systems. Unrestricted market conditions, e.g., in-market government rules that allow for destination marketing.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Support tourism growth benefiting all nine provinces.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Operating Officer.

Indicator title	Number of distribution channel initiatives in the Africa region implemented
Definition	<p>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 increasing conversion, i.e., trade, SAPO, media, influencers, corporates, and stakeholders. Distribution channel initiatives are platforms that allow South African Tourism to engage and communicate with distribution channels to drive brand messaging to the distribution channel themselves and, in other instances, to different audiences.</p>
Source of data	Quarterly Reports for the Africa Region.
Method of calculation or assessment	Simple count of the number of distribution channel initiatives implemented in the Africa region.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly Reports for the Africa Region outlining progress against the planned quarterly targets and is submitted three working days after the end of each quarter, approved by the Chief Operations Officer, or the assigned DOA. The Quarterly Reports for the Africa Region include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> 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 SMME products and experiences.

	<ul style="list-style-type: none"> Available South African products and experiences to promote.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Support tourism growth benefiting all nine provinces.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Operating Officer.

Indicator title	Number of localised marketing campaigns in the Europe region executed
Definition	<p>South African Tourism develops the global tourism marketing campaign for the destination. This campaign is then localised in the identified MPIF markets in Europe, including the United Kingdom/Ireland Hub, Central Europe Hub, South Europe Hub, and 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, in order to increase demand.</p>
Source of data	<ul style="list-style-type: none"> Annual Europe Localised Campaign Implementation Plan. Quarterly Campaign Reports. Campaign Close-Out Reports.
Method of calculation or assessment	Simple count of the number of localised marketing campaigns executed in the Europe region.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly Reports for the Europe Region outlining progress against the Annual Europe Localised Campaign Implementation Plan and the planned quarterly targets, were approved by the Chief Operations Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly Reports for the Europe Region include a portfolio of evidence which correlates with the progress reported in the quarterly reports. Campaign Close-Out Reports were approved by the Chief Operations Officer, or the assigned DOA, within sixty days after the end of the campaign.
Assumptions	<ul style="list-style-type: none"> Sufficient budget. Timeous global content that can be effectively localised. Clear global corporate identity guidelines. Working technology and related systems. Unrestricted market conditions. The current DOA remains the same.
Disaggregation of beneficiaries (where applicable)	Not applicable.

Spatial transformation (where applicable)	Support tourism growth benefiting all nine provinces.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Operating Officer.

Indicator title	Number of distribution channel initiatives in the Europe region implemented
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 to increase conversion, i.e., trade, media, influencers, corporates, and stakeholders. Distribution channel initiatives are platforms that allow South African Tourism to engage and communicate with distribution channels to drive our marketing communication.
Source of data	Quarterly Reports for the Europe Region.
Method of calculation or assessment	Simple count of the number of distribution channel initiatives implemented in the Europe region.
Means of verification	Verify that the: <ul style="list-style-type: none"> Quarterly Reports for the Europe Region outlining progress against the planned quarterly targets, were approved by the Chief Operations Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly Reports for the Europe Region include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Sufficient budget is allocated. The hosting policy and hosting platform are market relevant. Working technology and related systems. B2B Portal on SA.net – ability to connect SMMEs, trade, and consumers. A functioning sa.net website – with SMME products and experiences. The current DOA remains the same.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Support tourism growth benefiting all nine provinces.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Operating Officer.

Indicator title	Number of localised marketing campaigns in the Americas region executed
Definition	South African Tourism develops the global tourism marketing campaign for the destination. This 360* integrated campaign is then localised, nuanced to be fit for

	markets and actioned for rolling out in the Americas hubs, to increase demand. Prior to the Americas campaign being rolled out in each hub, it must be aligned to address the nuances of the specific markets. 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	<ul style="list-style-type: none"> Annual Americas Localised Campaign Implementation Plan. Quarterly Campaign Reports. Campaign Close-Out Reports.
Method of calculation or assessment	Simple count of the number of localised marketing campaigns executed in the Americas region.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly Reports for the Americas Region outlining progress against the Annual Americas Localised Campaign Implementation Plan and the planned quarterly targets, were approved by the Chief Operations Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly Reports for the Americas Region include a portfolio of evidence which correlates with the progress reported in the quarterly reports. Campaign Close-Out Reports were approved by the Chief Operations Officer, or the assigned DOA, within sixty days after the end of the campaign.
Assumptions	<ul style="list-style-type: none"> Sufficient budget. Timeous delivery of global content that can be effectively localised. Working technology and related systems.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Support tourism growth benefiting all nine provinces.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Operating Officer.

Indicator title	Number of distribution channel initiatives in the Americas region implemented
Definition	Americas 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 increase conversion.
Source of data	Quarterly Reports for the Americas Region.
Method of calculation or assessment	Simple count of the number of distribution channel initiatives implemented in the Americas region.
Means of verification	Verify that the:

	<ul style="list-style-type: none"> Quarterly Reports for the Americas Region outlining progress against the planned quarterly targets, were approved by the Chief Operations Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly Reports for the Americas Region include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Sufficient budget and SCM processes which support sourcing unique distribution initiatives for participation in. Functioning trade tools supported by a highly functional digital infrastructure. A functioning sa.net website – with SMME products and experiences. B2B Portal on SA.net – ability to connect SMMEs and trade and consumers.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Support tourism growth benefiting all nine provinces.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Operating Officer.

Indicator title	Number of localised marketing campaigns in the Asia Australasia region executed
Definition	South African Tourism develops the global tourism marketing campaign for the destination. This campaign is then implemented in Asia Australasia region. Before the campaign is rolled out, it must be aligned to address the nuances of the Asia markets. 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, to increase demand. Different marketing elements may be implemented in each quarter or span through different quarters.
Source of data	<ul style="list-style-type: none"> Annual Asia Australasia Localised Campaign Implementation Plan. Quarterly campaign reports. Campaign close-out reports.
Method of calculation or assessment	Simple count of the number of localised marketing campaigns executed in the Asia Australasia region.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly Reports for the Asia Australasia Region outline progress against the Annual Asia Australasia Localised Campaign Implementation Plan and the planned quarterly targets, and were approved by the Chief Operating Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly Reports for the Asia Australasia Region include a portfolio of evidence which correlates with the progress reported in the quarterly reports. Campaign Close-Out Reports were approved in line with the South African Tourism Delegation of Authority, within 60 days after the end of the campaign.
Assumptions	<ul style="list-style-type: none"> Sufficient budget. Timeous global content that can be effectively localised.

	<ul style="list-style-type: none"> Working technology and related systems.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Support tourism growth benefiting all nine provinces.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Operating Officer.

Indicator title	Number of distribution channel initiatives in the Asia Australasia region implemented
Definition	Asia Australasia 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 increase conversion.
Source of data	Quarterly Reports for the Asia Australasia Region.
Method of calculation or assessment	Simple count of the number of distribution channel initiatives implemented in the Asia Australasia region.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly Reports for the Asia Australasia Region outline progress against the planned quarterly targets and is submitted three working days after the end of each quarter, and is approved by the Chief Operations Officer, or the assigned DOA. The Quarterly Reports for the Asia Australasia Region include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Sufficient budget. Functioning trade tools. A functioning sa.net website – with SMME products and experiences. B2B Portal on SA.net – ability to connect SMMEs and trade and consumers.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Support tourism growth benefiting all nine provinces.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Operating Officer.

Indicator title	Number of localised marketing campaigns in the Embassy Support markets executed
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 must 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, to increase demand. Different marketing elements may be implemented in each quarter or span through different quarters.
Source of data	<ul style="list-style-type: none"> Annual Embassy Support Localised Campaign Implementation Plan. Quarterly campaign reports. Campaign close-out reports.
Method of calculation or assessment	Simple count of the number of localised marketing campaigns executed in the Embassy Support markets.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly Reports for the Embassy Support Markets outlining progress against the Annual Embassy Support Localised Campaign Implementation Plan and the planned quarterly targets and were approved by the Chief Operating Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly Reports for the Embassy Support Markets include a portfolio of evidence which correlates with the progress reported in the quarterly reports. Campaign Close-Out Report was approved in line with the South African Tourism DOA, within 60 days after the end of the campaign.
Assumptions	<ul style="list-style-type: none"> Sufficient budget. Timeous global content that can be effectively localised. Working technology and related systems.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Support tourism growth benefiting all nine provinces.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Operating Officer.

Indicator title	Number of distribution channel initiatives in the Embassy Support markets implemented
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 to increase conversion.

Source of data	Quarterly Reports for the Embassy Support Markets.
Method of calculation or assessment	Simple count of the number of distribution channel initiatives implemented in the Embassy Support markets.
Means of verification	Verify that the: <ul style="list-style-type: none"> Quarterly Reports for the Embassy Support Markets outlining progress against the planned quarterly targets, were approved by the Chief Operating Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly Reports for the Embassy Support Markets include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Sufficient budget. Functioning trade tools. A functioning SA.net website – with SMME products and experiences. B2B Portal on SA.net – ability to connect SMMEs and trade and consumers.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Support tourism growth benefiting all nine provinces.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Operating Officer.

4. PROGRAMME 4: BUSINESS EVENTS

Indicator title	Meetings Africa hosted
Definition	Meetings Africa is a business events trade show, owned by South African Tourism, aimed at creating a market access platform for African business events products and to position South Africa as a premier destination for business events. It serves as a platform to enable the growth of the business events industry on the continent and contributes towards its economic growth. South African Tourism thus plans to successfully host Meetings Africa 2026 to benefit the tourism industry.
Source of data	<ul style="list-style-type: none"> Project Plan for Meetings Africa 2026. Quarterly SANCB Reports. On-line diary system. Meetings Africa 2026 Post-Show Report.
Method of calculation or assessment	Simple count of the number of events hosted.
Means of verification	Verify that the: <ul style="list-style-type: none"> Quarterly SANCB Reports outlining progress against the planned quarterly targets, were approved by the Chief Convention Bureau Officer, or the assigned DOA, within three working days after the end of the quarter.

	<ul style="list-style-type: none"> The Quarterly SANCB Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Sufficient budget. Meetings Africa 2026 will not be cancelled.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the targets as planned.
Indicator responsibility	Chief Convention Bureau Officer.

Indicator title	Africa's Travel Indaba hosted
Definition	Africa's Travel Indaba is an iconic African leisure trade show, owned by South African Tourism, with the aim of creating market access for African leisure tourism products, and to position Africa as a premier destination for leisure tourism. South African Tourism thus plans to successfully host Africa's Travel Indaba 2025 to benefit the tourism industry.
Source of data	<ul style="list-style-type: none"> Project Plan for Africa's Travel Indaba 2025. Quarterly SANCB Reports. Online diary system. Africa's Travel Indaba 2025 Post-Show Report.
Method of calculation or assessment	Simple count of the number of events hosted.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly SANCB Reports outlining progress against the planned quarterly targets, were approved by the Chief Convention Bureau Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly SANCB Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Sufficient budget. Africa's Travel Indaba 2025 will not be cancelled.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the targets as planned.
Indicator responsibility	Chief Convention Bureau Officer.

Indicator title	Number of bid submissions for the MICE industry supported
Definition	South African Tourism supports bid submissions to increase the pipeline of bids awarded to destination South Africa, in an effort to grow the MICE industry and contribute to the country's economic growth. The number of bid submissions for international and regional business events (MICE) that will be supported by South African Tourism, and awarded to destination South Africa, will be tracked on a quarterly basis.
Source of data	<ul style="list-style-type: none"> List of bids supported on a quarterly basis. Bid submission letters signed by the Chief Convention Bureau Officer. Evidence that the signed bid support letters were dispatched to event owners. Quarterly SANCB Reports.
Method of calculation or assessment	Simple count of the number of bids submitted.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly SANCB Reports outline progress against the planned quarterly targets and were approved by the Chief Convention Bureau Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly SANCB Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Sufficient budget for execution. 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, etc.) to develop a bid strategy and bid document that responds to the hosting requirements of the event owner(s).
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Performance higher than planned target.
Indicator responsibility	Chief Convention Bureau Officer.

Indicator title	Number of business events hosted in VTSDs
Definition	The number of National Association business events supported and hosted in VTSDs, to contribute to broadening the economic benefits through the geographic spread of MICE events.
Source of data	<ul style="list-style-type: none"> List of National Association business events supported on a quarterly basis.

	<ul style="list-style-type: none"> Finalised Memorandum of Agreement between South African Tourism and the host organisation for each business event. Quarterly SANCB Reports. Post-Show Reports approved by the Chief Convention Bureau Officer.
Method of calculation or assessment	Simple count of the number of National Association business events hosted in VTSDs.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarterly SANCB Reports outline progress against the planned quarterly targets and were approved by the Chief Convention Bureau Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly SANCB Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> 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)	Contribute to rural economic transformation, benefitting VTSDs in all nine provinces.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Performance higher than planned target.
Indicator responsibility	Chief Convention Bureau Officer.

Indicator title	Business model for the growth and sustainability of South African Tourism owned strategic platforms implemented
Definition	Sustainability focuses on economic, environmental, social aspects. South African Tourism owned strategic platforms, namely, Africa's Travel Indaba and Meetings Africa, will be reviewed. This review will inform the development and implementation of a business model for the sustainability of these platforms to ensure their long-term viability and effectiveness. This would include the review of the hosted buyer and media programme. The growth and sustainability business model includes frameworks for sustainability, stakeholder partnerships, and operational efficiencies.
Source of data	<ul style="list-style-type: none"> Approved business model for the growth and sustainability of South African Tourism owned strategic platforms. Quarters 2, 3 and 4 SANCB Reports.
Method of calculation or assessment	Assess progress against the quarterly targets in Quarters 2, 3 and 4.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarters 2, 3 and 4 SANCB Reports outlining progress against the planned quarterly targets, and were approved by the Chief Convention Bureau Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly SANCB Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.

Assumptions	<ul style="list-style-type: none"> Adequate financial and human resources to implement the sustainability business model. Stakeholder alignment and buy-in are achieved for the sustainability business model. Implementation challenges are effectively managed.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly (Q2, Q3 and Q4).
Desired performance	Achievement of the targets as planned.
Indicator responsibility	Chief Convention Bureau Officer.

Indicator title	Number of South African tourism products promoted at global market access platforms
Definition	This indicator measures the number of South African tourism products, such as accommodation, experiences, and tourism offerings, promoted at global market access platforms, including Africa's Travel Indaba, Meetings Africa, and other international exhibitions or trade fairs, to enhance their global market access.
Source of data	<ul style="list-style-type: none"> Quarters 1, 3 and 4 SANCB Reports. Post-Show Reports.
Method of calculation or assessment	Simple count of the number of products promoted at global market access platforms
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarters 1, 3 and 4 SANCB Reports outlining progress against the planned quarterly targets, and were approved by the Chief Convention Bureau Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly SANCB Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Sufficient budget. International strategic platforms will not be cancelled.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly (Q1, Q3 and Q4).
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Convention Bureau Officer.

Indicator title	Number of B2B brand campaigns to create demand for South Africa as a premier business events destination executed
Definition	The development and implementation of business-to-business (B2B) campaigns, both domestic and global, focused on MICE, to create demand for South Africa as a premier business events destination
Source of data	<ul style="list-style-type: none"> ▪ B2B Domestic Campaign Plan. ▪ B2B Global Campaign Plan. ▪ Quarterly SANCB Reports. ▪ Campaign Close-Out Reports for each campaign.
Method of calculation or assessment	Simple count of the number of B2B campaigns executed.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> ▪ Quarterly SANCB Reports outline progress against each campaign and the planned quarterly targets and were approved by the Chief Convention Bureau Officer, or the assigned DOA, within three working days after the end of the quarter. ▪ The Quarterly SANCB Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports. ▪ Campaign Close-Out Reports for each campaign are approved by the Chief Convention Bureau Officer, or the assigned DOA.
Assumptions	<ul style="list-style-type: none"> ▪ Sufficient budget. ▪ Timeous and relevant content that can effectively utilised. ▪ Working marketing technologies to communicate content to business events audiences.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Convention Bureau Officer.

Indicator title	Number of assessments to demonstrate the economic impact of bids awarded conducted
Definition	This indicator tracks the number of assessments conducted to measure and demonstrate the economic impact of business events secured through successful bids. The assessments evaluate the contribution of awarded business events to South Africa's economy, including direct spending, job creation, and broader economic benefits to the MICE sector.
Source of data	<ul style="list-style-type: none"> ▪ Dashboard on bidding data. ▪ Quarters 2 and 4 SANCB Reports. ▪ Reports assessing the economic impact of bids awarded to South Africa.

Method of calculation or assessment	Simple count of the number of assessments conducted to demonstrate the economic impact of bids awarded to destination South Africa.
Means of verification	Verify that the: <ul style="list-style-type: none"> Quarters 2 and 4 SANCB Reports outlining progress against the planned quarterly targets, and were approved by the Chief Convention Bureau Officer, or the assigned DOA, within three working days after the end of the quarter. The Quarterly SANCB Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Adequate data is available from event organisers, participants, and other stakeholders. Funding and capacity are in place to conduct thorough assessments. 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	Achievement of target as planned.
Indicator responsibility	Chief Convention Bureau Officer.

5. PROGRAMME 5: TOURIST EXPERIENCE

Indicator title	Number of graded establishments
Definition	The number of tourism establishments that join the TGCSA Star Grading Membership Scheme and are graded to improve visitor experience.
Source of data	<ul style="list-style-type: none"> Total Quality in Tourism (TQiT) System reports. Quarterly Tourist Experience Reports.
Method of calculation or assessment	Simple count of the number of valid members on the TQiT System.
Means of verification	Verify that quarterly TQiT System reports were generated from the TQiT System within three working days after the end of each quarter and indicate the number of valid graded establishments for the reporting period.
Assumptions	<ul style="list-style-type: none"> Establishments find value in grading. The economy does not lead to establishments shutting down. Working technology and related systems. (e.g. TQiT, Oracle and all supporting technical systems) are 100% operational and servicing the business appropriately and efficiently.
Disaggregation of beneficiaries (where applicable)	Not applicable.

Spatial transformation (where applicable)	Contribute to balanced tourism development across all nine provinces.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Quality Assurance Officer.

Indicator title	Basic Quality Verification (BQV) Programme implemented
Definition	Implementation of the Basic Quality Verification (BQV) Programme in Gauteng to support new accommodation entrants.
Source of data	<ul style="list-style-type: none"> ▪ BQV Implementation Plan. ▪ Quarterly Tourist Experience Reports.
Method of calculation or assessment	Assess progress against the planned quarterly targets.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> ▪ Quarterly Tourist Experience Reports detail progress against the BQV Implementation Plan and the planned quarterly targets, and were approved by the Chief Quality Assurance Officer, or the assigned DOA, within three working days after the end of each quarter. ▪ The Quarterly Tourist Experience Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> ▪ BQV evaluators are adequately recruited and managed by contracted service provider. ▪ All evaluators are trained and meet minimum standard requirements. ▪ The service provider meets its contractual obligations. ▪ Support from Gauteng properties to participate in the BQV Programme. ▪ Provincial and municipal buy-in and support for the BQV Programme. ▪ Working technology and related systems. (e.g. tablets, data, registration, and other digital systems) are 100% operational and servicing the business appropriately and efficiently.
Disaggregation of beneficiaries (where applicable)	Emphasis on women, youth, and persons with disabilities owned enterprises.
Spatial transformation (where applicable)	Contribute to balanced tourism development across all nine provinces.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Quality Assurance Officer.

Indicator title	Number of initiatives to equip global trade to better sell South Africa implemented
Definition	Initiatives to enhance global trade will include those that support local and international trade and distribution channels, and any other interested stakeholder, to better sell South Africa. This may be undertaken through initiatives including, but not limited to: trade tools and/or hostings and/or workshops and/or educational material and/or collaborations with online travel agents and/or destination management companies and/or tour operators and/or associations and/or other similar bodies.
Source of data	<ul style="list-style-type: none"> Quarters 2 and 4 Tourist Experience Reports.
Method of calculation or assessment	Simple count of the number of initiatives implemented to enhance global trade.
Means of verification	<p>Verify that the:</p> <ul style="list-style-type: none"> Quarters 2 and 4 Tourist Experience Reports detail the progress against the planned quarterly targets and were approved by the Chief Quality Assurance Officer, or the assigned DOA, within three working days after the end of each quarter. The Quarterly Tourist Experience Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Sufficient budget and resources. Working technology and related systems. Timeous approvals.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly (Q2 and Q4).
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Quality Assurance Officer.

Indicator title	Number of initiatives to support air access through the Tourism Route Development Marketing Plan implemented
Definition	The Tourism Route Development Marketing Plan (TRDMP) aims to maximise South Africa's domestic and international air access and route development and maintenance through various marketing initiatives that increase market volumes and brand awareness for sustained connectivity.
Source of data	<ul style="list-style-type: none"> Cabinet approved Tourism Route Development Marketing Plan Approach Quarterly Tourist Experience Reports.
Method of calculation or assessment	Simple count of the number of initiatives to support air access through the Tourism Route Development Marketing Plan
Means of verification	Verify that the:

	<ul style="list-style-type: none"> Quarterly Tourist Experience Reports detail progress against the planned quarterly targets and are approved by the Chief Quality Assurance Officer within three working days of the end of the quarter. The Quarterly Tourist Experience Reports include a portfolio of evidence which correlates with the progress reported in the quarterly reports.
Assumptions	<ul style="list-style-type: none"> Sufficient budget and resources. Working technology and related systems. Timeous approvals. Sponsorship and revenue receipt model. Adequate approval of international travel.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Calculation type	Cumulative (year-end).
Reporting cycle	Quarterly.
Desired performance	Achievement of the target as planned.
Indicator responsibility	Chief Quality Assurance Officer.

ANNEXURES TO THE ANNUAL PERFORMANCE PLAN

ANNEXURE A: AMENDMENTS TO THE STRATEGIC PLAN

There are no amendments to the Strategic Plan for 2025 to 2030, as this 2025/26 Financial Year Annual Performance Plan was developed at the same time.

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

South African Tourism aligns its efforts with the District Development Model by advancing equitable tourism growth across South Africa's districts and metropolitan areas. The District Development Model focuses on integrated planning and spatial transformation, and South African Tourism contributes to these objectives by promoting geographic diversity, empowering marginalised communities, and enhancing the appeal of underrepresented regions. Key contributions include:

- Promoting geographic diversity in tourism: Efforts are directed towards encouraging the spread of international and domestic tourists across all nine provinces. By showcasing South Africa's diverse tourism offerings, the economic and social benefits of tourism can be extended beyond traditional hubs to rural areas, small towns, and historically under-represented regions.
- Showcasing rural and peri-urban destinations: Through targeted marketing campaigns and support to MICE hosting, unique attractions in rural and peri-urban areas are highlighted, such as cultural heritage sites, eco-tourism destinations, and community-based tourism initiatives. These initiatives seek to foster sustainable growth in local economies while integrating underdeveloped areas into the broader tourism landscape, contributing to inclusive growth and regional development.
- Strengthening provincial collaboration: Collaborative partnerships with provincial tourism boards, municipalities, and community stakeholders are central to aligning tourism development efforts with local priorities. Tailored interventions reflect the distinct offerings of each region, supporting the promotion of unique products and experiences. This collaboration seeks to amplify the impact of provincial initiatives and ensure that tourism contributes meaningfully to regional economic and social goals.
- Enhancing traveller access and experience: Ensuring that all provinces are accessible and appealing to travellers is a key priority. By promoting seamless travel experiences and world-class attractions, these efforts seek to encourage tourists to explore less-visited regions, contributing to balanced tourism growth and a broader geographic reach.

South African Tourism's alignment with the District Development Model demonstrates its commitment to ensuring inclusive and equitable tourism growth. By supporting spatial transformation and regional development, tourism becomes a catalyst for economic inclusion, ensuring that its benefits are distributed fairly and contribute to balanced growth across all provinces.

ANNEXURE E: ABBREVIATIONS

APP	Annual Performance Plan
B2B	Business to Business
BQV	Basic Quality Verification
COVID-19	Corona Virus Disease, 2019
DigiTech	Digital Transformation
DOA	Delegation of Authority
ExCo	Executive Management Committee
FY	Financial Year
G20	Group of Twenty
GDP	Gross Domestic Product
GNU	Government of National Unity
ICT	Information and Communication Technology
MICE	Meetings, Incentives, Conferences and Trade Exhibitions
MOU	Memorandum of Understanding
MPIF	Market Prioritisation and Investment Framework
MPIF	Marketing Prioritisation and Investment Framework
MTDP	Medium-Term Development Plan
MTEF	Medium Term Expenditure Framework
NDP	National Development Plan, Vision 2030
NTSS	National Tourism Sector Strategy 2016-2026
OPCA	Operation Clean Audit
PESTEL	Political, Economic, Social, Technological, Environmental, and Legal
PFMA	Public Finance Management Act
PR	Public Relations
PTA	Provincial Tourism Authority
Q	Quarter
SANCB	South African National Convention Bureau
SAPO	South African Product Owners
SCM	Supply Chain Management
SMME	Small, Medium, and Micro Enterprises
SWOT	Strengths, Weaknesses, Opportunities and Threats
TGCSA	Tourism Grading Council of South Africa
TOMSA	Tourism Marketing Levy South Africa
TQiT	Total Quality in Tourism
TRDMP	Tourism Route Development Marketing Plan
UNWTO	United Nations World Tourism Organisation
VTSDs	Villages, Towns and Small Dorpies