SOUTH AFRICAN TOURISM

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ANNUAL PERFORMANCE PLAN FY2023/24

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EXECUTIVE AUTHORITY STATEMENT

I am honoured to join this dynamic sector and to present South African Tourism's 2023/24 Annual Performance Plan.

South African Tourism's twofold strategic intent is firstly, to lead the recovery of the tourism sector that reasserts South Africa as a preferred leisure and business events destination to relevant priority markets; and secondly, to position South Africa for the future of tourism in an environment of rapid change, while prioritising domestic tourism.

Although the tourism sector was severely impacted by the Covid-19 pandemic the sector is back on a growth path where foreign tourist arrivals and domestic business and leisure travel are gradually increasing, signalling that the sector is well on its way to recovery.

South African Tourism, together with other stakeholders within the value chain, led by the Department of Tourism, will continue to implement the Tourism Sector Recovery Plan (TSRP), in terms of focusing on the identified seven strategic interventions, to support the revival of the sector:
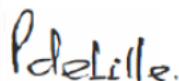
1. Implement norms and standards for safe operation across the tourism value chain to enable safe travel and rebuild traveller confidence;
2. Stimulate domestic demand through targeted initiatives and campaigns;
3. Strengthen the supply-side through resource mobilisation and investment facilitation;
4. Support for the protection of core tourism infrastructure and assets;
5. Execute a Global Marketing Programme to reignite international demand;
6. Tourism regional integration; and
7. Review tourism policy to provide enhanced support for sector growth and development.

Tourism is a life-affirming industry in which the economic benefits are spread widely throughout communities. The United Nations World Tourism Organisation (UNWTO) describes Tourism as "an economic and social phenomenon" and even though tourism is also about fun, relaxation, and adventure, the business of tourism is serious one that many in South Africa can benefit from by means of employment and empowerment. Tourism is an important driver for job creation across the world and remains a key driver of the South African economy, and a key imperative as per the National Development Plan (NDP), which aims to create a more equal society by 2030.

Tourism continues to be a significant tool for economic development, contributing to income generation, employment, and foreign exchange earnings. This is because the benefits of tourism are spread throughout the economy. South African Tourism will be a key contributor to the key priorities of government, which include addressing unemployment, especially for our youth, poverty alleviation, the energy crisis, and both socio-economic and spatial equality.

I appreciate continued commitment of the South African Tourism Board, the Executive Management Team and the South African Tourism Staff. I look forward to working together with them in leading and directing efforts to fulfill SA Tourism's mandate effectively.

I endorse this Annual Performance Plan (APP) of South African Tourism for the year 2023/24.

Pdelille.

Patricia de Lille, MP
Minister: Tourism

ACCOUNTING AUTHORITY STATEMENT

It is so encouraging that we can safely say the world is moving once again. The global tourism industry is on a healthy path to recovery post the COVID-19 pandemic and this is welcome news. When the COVID-19 pandemic first broke in March 2020, our government took some tough decisions with the sole aim of putting people's lives first. Unfortunately, some of the measures that were put in place to contain the spread of the virus, negatively affected our economy, but they were necessary, and saved lives.

As a country, we have seen the worst and because of our resilience, we have emerged stronger, and we are rebuilding. We are enthused to move forward, and we are pleased that in putting together this Annual Performance Plan (APP), we have taken time to partner and collaborate with various stakeholders and have also studied key insights and have applied these in the formulation of our strategic direction for the next fiscal and beyond.

Our biggest heroes in the last two and half years have been South Africans. As soon as the COVID-19 related regulations were revised and permitted more movement, South Africans took time out to explore their own country. Domestic travel has been instrumental in sustaining the tourism sector and its importance continues and cannot be understated. We are so pleased that domestic travel in our country is currently booming and even surpassing 2019 performance. South Africans have once again shown their love and commitment to their country.

More than 75% of our tourist arrivals come from the rest of the African continent. The COVID-19 pandemic re-emphasised the importance of intra-Africa travel. This is not only important for tourism but for greater trade and industry and ultimately economic growth and social cohesion.

The plans detailed in this APP have been devised to ensure that travellers from across the world choose South Africa as their next country to come visit and explore. Importantly, our plans recognise the need to partner with the greater tourism sector and ensure that South Africa is adequately geared up for South Africans to access and enjoy their own country and indeed to welcome visitors.

Tourism is not only about the wondrous beauty that this country has to offer, but also about economic impact. It is about sustaining livelihoods and transformation. The global recovery from the COVID-19 pandemic has called for South African Tourism to reconfigure its plans and this APP is a strategic outline of our strategic choices with a clear intent for us to achieve our mandate and increase our contribution to South Africa's inclusive economic growth.

I am pleased to present the South African Tourism Annual Performance Plan for the 2023/2024 Financial Year (FY). As the Board, we affirm our commitment to providing strategic guidance that will support South African Tourism to optimally deliver on its mandate. We believe that this Annual Performance Plan considers the change in the global tourism landscape and reflects the required strategic shift and agility required to achieve our goals. The Board fully endorses this Annual Performance Plan as the guiding document for the work and focus of South African Tourism for the FY2023/24.

Dr. Thozamile Botha

Chairperson

South African Tourism Board

CHIEF EXECUTIVE OFFICER STATEMENT

The South African tourism industry has seen tremendous growth since the beginning of 2022, as the COVID-19 restrictions were completely lifted. We are excited that the tourism sector is regaining momentum and continues to make a positive impact on our economy.

South African Tourism has continued its targeted efforts towards inclusive recovery within the sector, through various initiatives. These initiatives are aimed at stimulating travel both internationally and locally.

Locally, the *Sho't Left Travel Week* which took place in September 2022 continues to encourage South Africans to explore their own country. This initiative is in collaboration with local tourism trade who partner with South African Tourism to offer affordable travel deals of up to 50% discount on various tourism products and experiences to make tourism accessible to all South Africans.

During 2022, the tourism sector in KwaZulu-Natal was dealt a heavy blow when the province was hit by devastating floods. Our response was to forge ahead and continue to host Africa's Travel Indaba (ATI) in Durban, to contribute towards the province's recovery and the livelihoods of the communities and small businesses in Durban. Africa's Travel Indaba 2022 attracted thousands of delegates, including buyers and exhibitors onto KwaZulu-Natal's shores, thus contributing to the province's economy and drawing attention to the tourism products and services from across the continent.

However, there are still challenges in our operating environment. The global aviation industry faced a disruption in fuel supply due to the Russia-Ukraine conflict, which was not unique to the South African tourism sector. The limited number of flights available could not meet demand, which also resulted in the high cost of airline fares which adversely impacted travel.

On a positive note, South African Airways (SAA) has been back in the sky for a year now and has been increasing its flight frequency across the continent. SAA plays a crucial role for South Africa's tourism industry since 80% of international arrivals are from the African continent.

Several international airlines have increased their flight capacity and routes into South Africa. The past year has seen German airline, Lufthansa, increase its route in South Africa, which included one to Mbombela in Mpumalanga. This was with the aim to provide easy access for international tourists heading to the Kruger National Park and surrounding areas.

Emirates and Qatar Airways have increased their flight frequency into South Africa, while Air Belgium recently made its first touchdown in the country. There is also buy-in from USA's United Airlines to increase frequency of flights into South Africa.
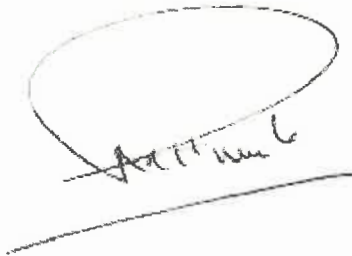
Our road infrastructure provides a great link not only for domestic travel, but for international travellers as well. Tour buses transporting international tourists and visitors encourage tourism expenditure that also support small, medium, and micro enterprises (SMMEs) across the value chain.

Our rigorous marketing efforts as South African Tourism have and will continue to show that South Africa is still one of the top tourism destinations in the world. International travellers are yearning to come visit South Africa to experience our rich culture, diversity, and to also engage in business activities in the country.

Moving into the new financial year, collaboration continues to be critical. In crafting this Annual Performance Plan, South African Tourism has facilitated various feedback and planning sessions with key tourism industry stakeholders to ensure that the work we plan to produce for the FY2023/24 is geared towards addressing the relevant industry challenges.

In 2022, we hosted our inaugural Planning Conference (PlanCon), specifically aimed at bringing the industry together to ideate and strategise toward moving the industry forward. Additionally, the organisation has co-created the Annual Performance Plan with its partners, ensuring that it is robust and inclusive.

We look forward to continuing to promote South Africa as a foremost tourism destination to increase tourist arrivals in the next financial year, and to reaching our goal of 21 million arrivals by 2030.

Mr. Mzilikazi Khumalo

Acting Chief Executive Officer

South African Tourism

OFFICIAL SIGN-OFF

It is hereby certified that this FY2023/24 Annual Performance Plan:

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

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

3) Accurately reflects the outputs and targets which South African Tourism will endeavour to achieve over the 2023/24 financial year.

Bronwen Auret
Chief Quality Assurance
Officer

Date: 27/03/23

Themba Ndlovu
A/Chief Financial
Officer

Date: 27/03/2023

Robert Manson
A/Chief Strategy Officer

Date: 27/03/2023

Nomasonto Ndlovu
Chief Operations
Officer

Date: 27.03.2023

Zinhle Nzama
A/Chief Convention
Bureau Officer

Date: 27/03/2023

Yoland Kona
Head: Strategic
Planning, Evaluation
& Programme
Management

Date: 27/3/2023

Mzilikazi Khumalo
Chief Marketing Officer
& A/Chief Executive
Officer

Date: 27/3/2023

Approved by:

Dr. Thozamile Botha
Chairperson
SA Tourism Board
(Accounting Authority)

Date: 27-3.2023

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

Date: 30-03-2023

ABBREVIATIONS AND ACRONYMS

APP	Annual Performance Plan
ATI	Africa's Travel Indaba
ATM	Arabian Travel Market
BEE	Black Economic Empowerment
B-BBEE	Broad-Based Black Economic Empowerment
B2B	Business to Business
CEO	Chief Executive Officer
COO	Chief Operations Officer
COVID-19	Corona Virus Disease, 2019
CSI	Corporate Social Investment
DT	Department of Tourism
DigiTech	Digital Technology
ERRP	Economic Reconstruction and Recovery Plan
EAP	Economically Active Population
EE	Employment Equity
EEA	Employment Equity Act
ExCo	Executive Management Committee
FY	Financial Year
GDP	Gross Domestic Product
ICT	Information and Communication Technology
JMIC	Joint Meeting Industry Council
KPI	Key Performance Indicator
LTO	Labour Turnover
MPIF	Marketing Prioritisation and Investment Framework
MTEF	Medium Term Expenditure Framework
MTSF	Medium-Term Strategic Framework
MICE	Meetings, Incentives, Conferences and Trade Exhibitions
MOA/U	Memorandum of Agreement/Understanding
NDP	National Development Plan
NTSS	National Tourism Sector Strategy 2016-2026
N/A	Not Applicable
PlanCon	Planning Conference

PCO	Professional Conference Organiser
PFMA	Public Finance Management Act
PR	Public Relations
Q	Quarter
ROI	Return on Investment
SME	Small and Medium-sized Enterprise
SMME	Small, Medium, and Micro Enterprises
SAA	South African Airways
SANCB	South African National Convention Bureau
SA Tourism	South African Tourism
SMART	Specific, Measurable, Achievable, Realistic and Time-bound
SONA	State of the Nation Address
SCM	Supply Chain Management
SDG	Sustainable Development Goal (United Nations, 2015)
TQiT	Total Quality in Tourism
TDM	Tourism Decision Metrics
TGCSA	Tourism Grading Council of South Africa
TOMSA	Tourism Marketing South Africa
TSRP	Tourism Sector Recovery Plan
UK	United Kingdom
UN	United Nations
UNWTO	United Nations World Tourism Organisation
USA	United States of America
UGC	User-generated Content
VTSDs	Villages, Towns and Small Dorpies
WTTC	World Travel and Tourism Council

TABLE OF CONTENTS

LIST OF FIGURES

PART A: OUR MANDATE

1. UPDATES TO RELEVANT LEGISLATIVE AND POLICY MANDATES

1.1. UPDATED LEGISLATIVE MANDATES

There are no updates to the legislative mandates presented in the South African Tourism Five-Year Strategic Plan 2020-2025, which reflects the following:

1) Constitutional mandate:

   a) The provisions of the Constitution of the Republic of South Africa (No. 108 of 1996):

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

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

2) Legislation defining the South African Tourism mandate:

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

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

3) Legislation informing the delivery of the core mandate:

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

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

1.2. UPDATED POLICY MANDATES

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

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

2) The Medium-Term Strategic Framework 2019-2024 (MTSF) gives effect to the electoral mandate and is framed around seven national priorities for the period to 2024. South African Tourism contributes to three MTSF priorities:

a)   Priority 1: A capable, ethical, and developmental State.

b)   Priority 2: Economic transformation and job creation; and

c)   Priority 7: A better Africa and world.

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

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

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

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

2.   UPDATES TO INSTITUTIONAL POLICIES AND STRATEGIES

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

2.1.   ECONOMIC RECONSTRUCTION AND RECOVERY PLAN, 2020

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

Figure 1:   Economic Reconstruction and Recovery Plan
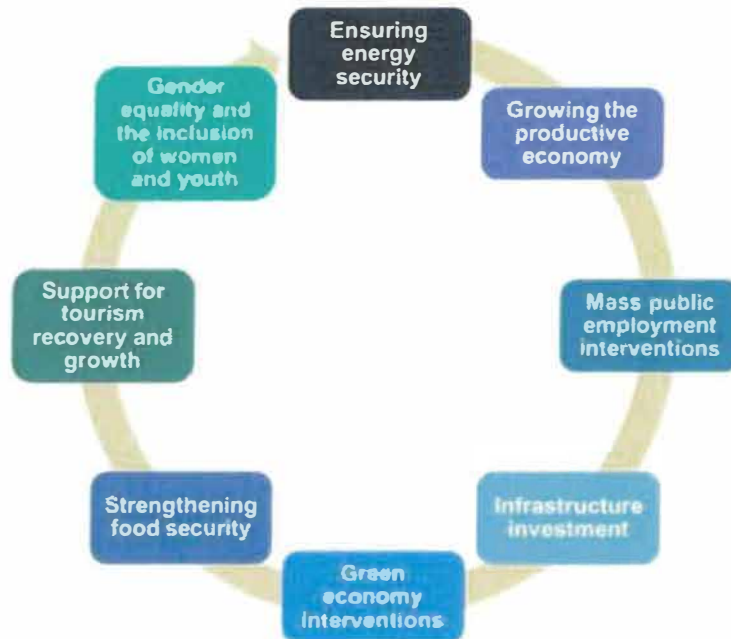
Source: Economic Reconstruction and Recovery Plan, 2020

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

2.2.   TOURISM SECTOR RECOVERY PLAN, 2021

The COVID-19 pandemic and the resultant economic shutdown has had a severe impact on the tourism sector, with many businesses struggling to recover from the related disruptions and lockdowns. A key consideration necessitated by the impact of the pandemic meant that South Africa had to protect the tourism sector and outcompete in a world where every destination is chasing recovery.

Thus, the Tourism Sector Recovery Plan (TSRP) was developed. The plan acknowledges the need for targeted and coordinated action to mitigate the impact of the crisis and to set the sector on the most optimal path to recovery, transformation, and long-term sustainability.

The TSRP is anchored on three interlinked pillars with a number of strategic interventions to support each theme. The TSRP also identifies enablers to support tourism recovery.

Figure 2: Tourism Sector Recovery Plan
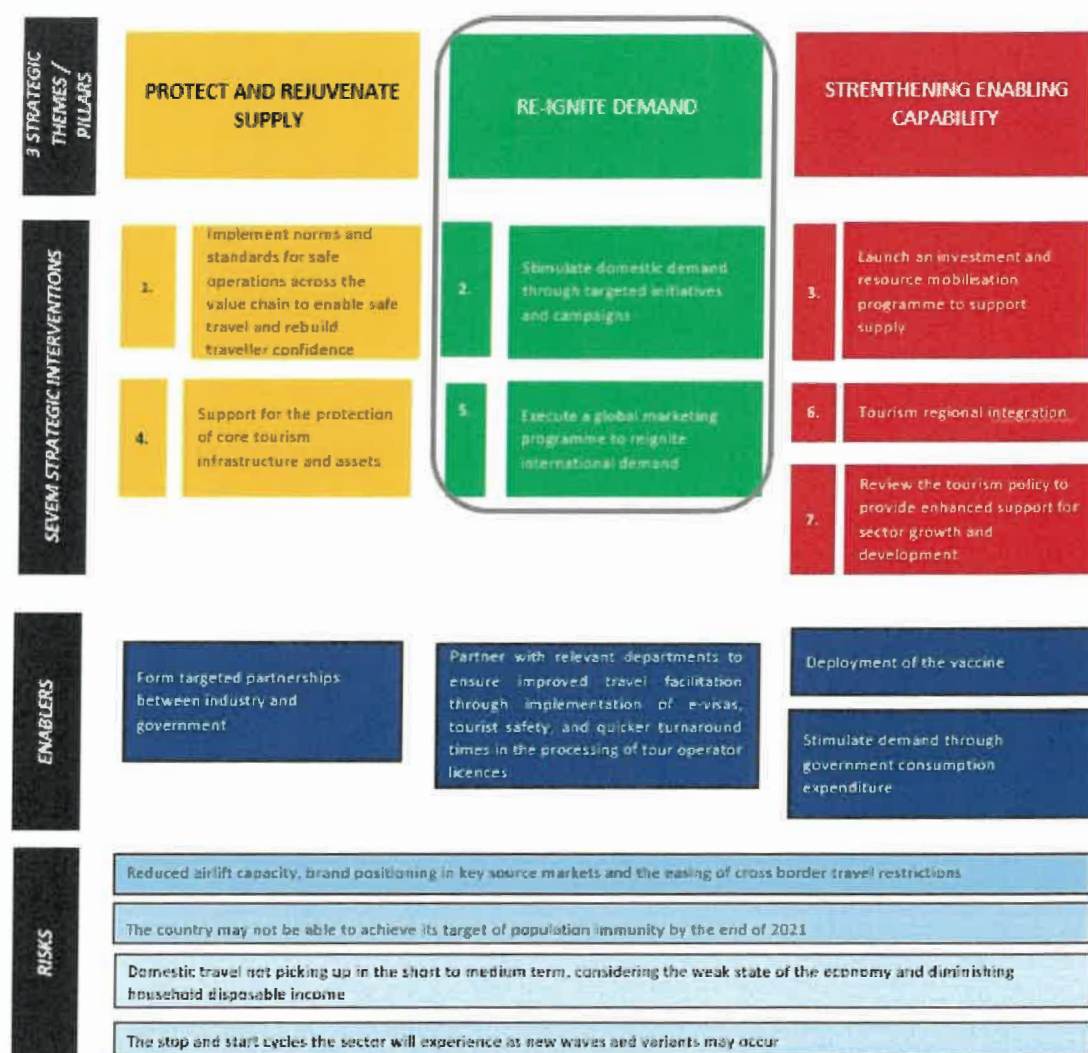
Source: Tourism Sector Recovery Plan, April 2021

South African Tourism anchors its planning around giving effect to the TSRP. This Annual Performance Plan clearly outlines how South African Tourism aims to continue its approach to the recovery of the sector in the 2023/24 fiscal year.

2.3. SOUTH AFRICAN TOURISM MARKETING PRIORITISATION AND INVESTMENT FRAMEWORK

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

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

Review and update the various parameters to ensure a robust view of the current business environment and market prioritisation.

Support day-to-day decision-making through an enhanced view on increasing efficiency and tapping into short-term opportunities.

Transition key elements of the MPIF model to a power business intelligence environment to enable easy access, navigation, and usage.

A total of 24 markets were prioritised, which were segmented into 16 growth and 8 defend markets, with an additional set of watchlist markets:

Segment	Description	Service Model
Defend Markets	• Markets where South Africa holds a substantial market share and requires continued intervention to ensure arrivals. • These markets hold both volume and value importance for South Africa. South African Tourism needs to maintain or defend its share.	Maintain the existing share in the markets outbound.
Growth Markets	• Markets that hold considerable outbound potential. • However, the share of South Africa in outbound has growth potential. • These markets provide an ample opportunity to grow based on their size.	Elevate South Africa's position in the market relative to long-haul competitors.
Watchlist Markets	• Markets that hold reasonable outbound potential. • However, the current share of South Africa in outbound is low. • These markets provide an opportunity for nurturing and investing for future growth and need to be kept in the watchlist.	

Figure 3:   Priority Source Markets Identified to Grow Tourism into South Africa, 2020-2025

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

In addition to the above, the watchlist markets hold reasonable outbound potential. These markets are key to monitor, as South African Tourism needs to protect its previous marketing investments. This is to build demand in second-tier markets that provide a pipeline for future growth, and that may diversify the portfolio of source countries to mitigate the risk of depending on only 24 markets to drive tourism recovery. The watchlist markets by region are:

Europe	Asia Pacific	Americas	Africa Air
Switzerland Belgium Sweden Ireland Denmark Portugal	Singapore Malaysia United Arab Emirates	-	Democratic Republic of Congo Tanzania
Austria Norway Finland Turkey	New Zealand	Argentina	Ghana Angola Uganda Ethiopia

While South African Tourism has aspired to bolster tourism growth by 2.5%, in partnership with the public and private sectors, to meet the target of 21 million arrivals by 2030, the econometric forecasts for South Africa have been revised downwards due to the impact of the COVID-19 pandemic. This has led to a widened gap in terms of the revised 2030 forecasts that are lower than previous projections; and a reduced timeframe, as South Africa has a shorter time horizon to meet the 2030 goal, as it is expected that markets will reach pre-COVID-19 levels later than originally projected.

Figure 4: South African Tourism's Pre-COVID-19 Target Compared to Post-COVID-19 Target
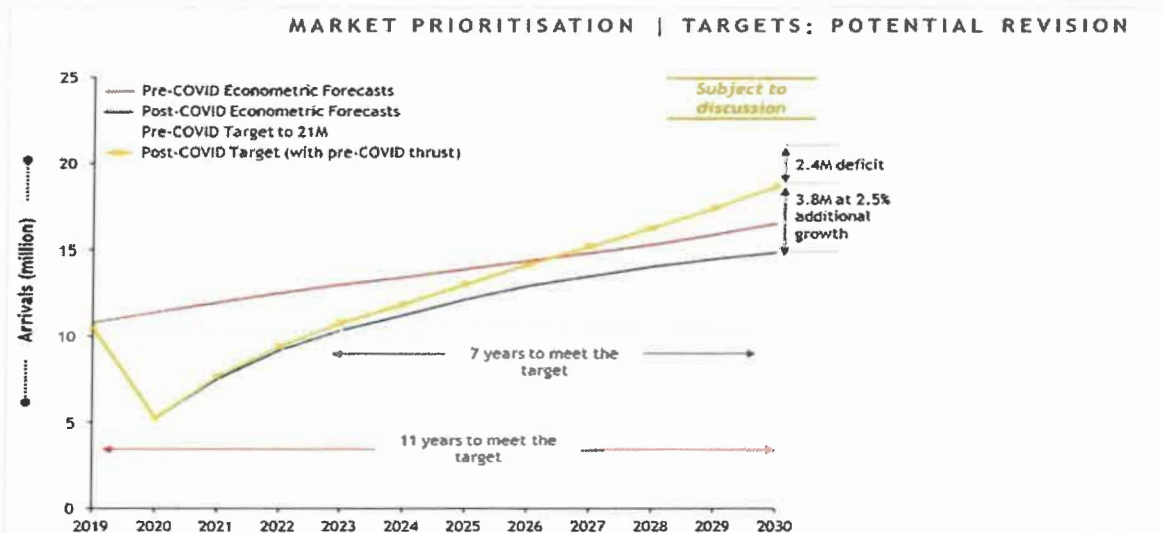
Source: Marketing Prioritisation and Investment Framework, September 2020

The challenges of the response to the unprecedented COVID-19 pandemic have decimated the ability of many of the MPIF source markets to travel to South Africa. Source market travel restrictions, international government regulations, and slashed airline routes will continue to severely impact the ability of international travel to South Africa for months to come.

Consequently, the relative priority of the 24 markets must be considered, in conjunction with dynamic and current information on variables that will affect the likelihood of travel from each market.

3. UPDATES TO RELEVANT COURT RULINGS

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

PART B: OUR STRATEGIC FOCUS

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

VISION

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

MISSION

Marketing South Africa both internationally and domestically to increase the volume of tourists and the value they add to the economy, by:

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

VALUES

In working towards the achievement of its vision and mission, South African Tourism subscribes to the following organisational values, which are in line with the Batho Pele principles:

Integrity	We do things consistently, ethically, and honestly, regardless of the circumstances.
Respect	We treat everyone with utmost dignity, inclusiveness, openness and tolerance, and a sense of appreciation of diversity.
Authentic / Caring	We show, and act, with genuine care to each other, customers, shareholder, partners, suppliers, and the business.

VALUES	
	We take personal accountability for delivering work that exceeds customers' and stakeholders' expectations.
	We take pride in, and commit to, always meeting and exceeding our customers' and stakeholders' expectations with outstanding quality.

1. UPDATED SITUATIONAL ANALYSIS

1.1. EXTERNAL ENVIRONMENT ANALYSIS

1.1.1. GLOBAL AND REGIONAL CONTEXT

While the effect of the COVID-19 pandemic has been felt across the entire travel and tourism ecosystem, 2021 saw the beginning of the recovery for the sector. The 2022 annual research, which covers 185 countries and 26 regions of the world, reveals the extent of the recovery in 2021.

Figure 5: Contribution of Global Travel and Tourism to GDP and Jobs

Global Data				
$	**Total GDP contribution:**		👥	**Total Travel & Tourism jobs:**
2019	**10.3%** USD 9,630 BN	Travel & Tourism GDP change:	**333 MN** = 1 in 10 jobs	Change in Jobs[2]:
2020	**5.3%** USD 4,775 BN	**-50.4%** =USD -4,855 BN (Economy GDP = -3.3%)	**271 MN** = 1 in 12 jobs	**-62.0MN** = -18.6%
2021	**6.1%** USD 5,812 BN	**+21.7%** =USD 1.038 BN (Economy GDP = 5.8%)	**289 MN** = 1 in 11 jobs	**+18.2MN** = + 6.7%

Source: WTTC Travel and Tourism Economic Impact Report, 2022

In 2019, travel and tourism supported 333 million jobs around the world, representing 1 in 10 of all jobs globally. Despite government retention schemes, such as furloughs and others which supported employment, 62 million jobs were lost in 2020, a decline of 18.6%.

As the contribution of the sector to the global economy increased by 21.7% in 2021, it was accompanied by a rise in the number of travel and tourism jobs from 271,3 million in 2020 to 289,5 million in 2021, an increase of 18,2 million jobs (6.7%). The sector supported 1 in 11 jobs across the entire economy in

2021. The change in travel and tourism's contribution to jobs is slower than the change in contribution to Gross Domestic Product (GDP) because jobs are less elastic and less volatile.

Figure 6: Economic Impact Timeline, 2000 to 2021
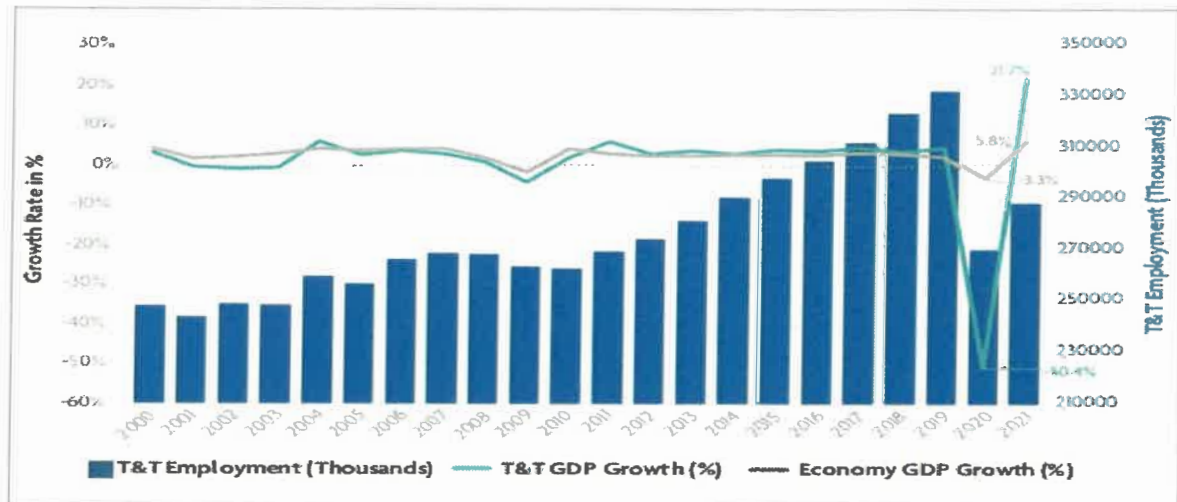
Source: WTTC Travel and Tourism Economic Impact Report, 2022

Prior to the COVID-19 pandemic, the growth rate of the global travel and tourism sector outpaced the growth of the global economy for nine consecutive years. After a devastating 50.4% fall in the contribution of the sector to the global economy, travel and tourism recovered by 21.7% in 2021. In comparison, the global economy bounced back by 6.7%. Travel and tourism's pace of recovery was slowed down by the spread of the Omicron variant in the second half of 2021, which compelled governments to reinstate restrictions on international travel.

According to the UNWTO, international tourism is on track to reach pre-pandemic levels by the end of 2022 as the sector continues to bounce back from the pandemic. An estimated 700 million tourists travelled internationally between January and September 2022, more than double (+133%) the number recorded for the same period in 2021. This equates to 63% of 2019 levels and puts the sector on course to reach 65% of its pre-pandemic levels this year, in line with UNWTO scenarios.

Results were boosted by strong pent-up demand, improved confidence levels, and the lifting of restrictions in an increasing number of destinations. Highlighting the speed at which the sector has recovered from the worst crisis in its history, the latest World Tourism Barometer from the UNWTO reveals that monthly arrivals were 64% below 2019 levels in January 2022 and had reached 37% by September 2022. An estimated 340 million international arrivals were recorded in the third quarter of 2022 alone, almost 50% of the nine-month total.

Europe continues to lead the rebound of international tourism. The region welcomed 477 million international arrivals between January and September 2022 (68% of the world total), hitting 81% of pre-pandemic levels. This was more than double that of 2021 (+126%) with results boosted by strong intra-regional demand and travel from the United States. Europe saw a particularly robust performance in Quarter 3, when arrivals reached almost 90% of 2019 levels.

South Africa is performing at 46% (January to November 2022) below 2019 levels, which is below the global average of -37% (January to September 2022).

The global travel and tourism's recovery was predominantly supported by the rise in spending by domestic visitors than revenues from international visitors. Travel and tourism domestic spending

recovered significantly, by 31.4% globally, whereas spending by international visitors recovered by 3.8%, as travel restrictions for foreign visitors remained in place across many countries. As a result, the share of domestic spending to total travel and tourism spending increased from 72% in 2019 to 85% in 2021. Travel and tourism business spending and leisure spending grew at 30.9% and 25.1% respectively.

UNWTO's forward-looking scenarios, published in May 2022, point to international arrivals reaching 55% to 70% of pre-pandemic levels in 2022. Results depend on evolving circumstances. These are mostly changing travel restrictions, ongoing inflation including high energy prices, the evolution of the war in Ukraine, as well as the health situation related to the pandemic. More recent challenges, such as staff shortages, severe airport congestion, flight delays, and cancellations, could also impact international tourism numbers.

Scenarios by region show Europe and Americas recording the best tourism results in 2022. International tourist arrivals in Europe could climb to 65% or 80% of 2019 levels in 2022, depending on various conditions, while the Americas could reach 63% to 76% of those levels.

In Africa and the Middle East, arrivals could reach about 50% to 70% of pre-pandemic levels, while Asia and the Pacific could remain at 30% of 2019 levels in the best-case scenario, due to stricter policies and restrictions.

Figure 7: Forecast 2022 to 2032

Source: WTTC Travel and Tourism Economic Impact Report, 2022

The 2022 to 2032 longer-term forecast predicts that travel and tourism's contribution to the global economy is expected to grow at an average annual rate of 5.8%, which is more than double the 2.7% average annual growth rate estimated for the global economy. In the same period, the sector is forecasted to generate 126 million additional jobs.

Figure 8: Monthly Change in International Tourist Arrivals by Region
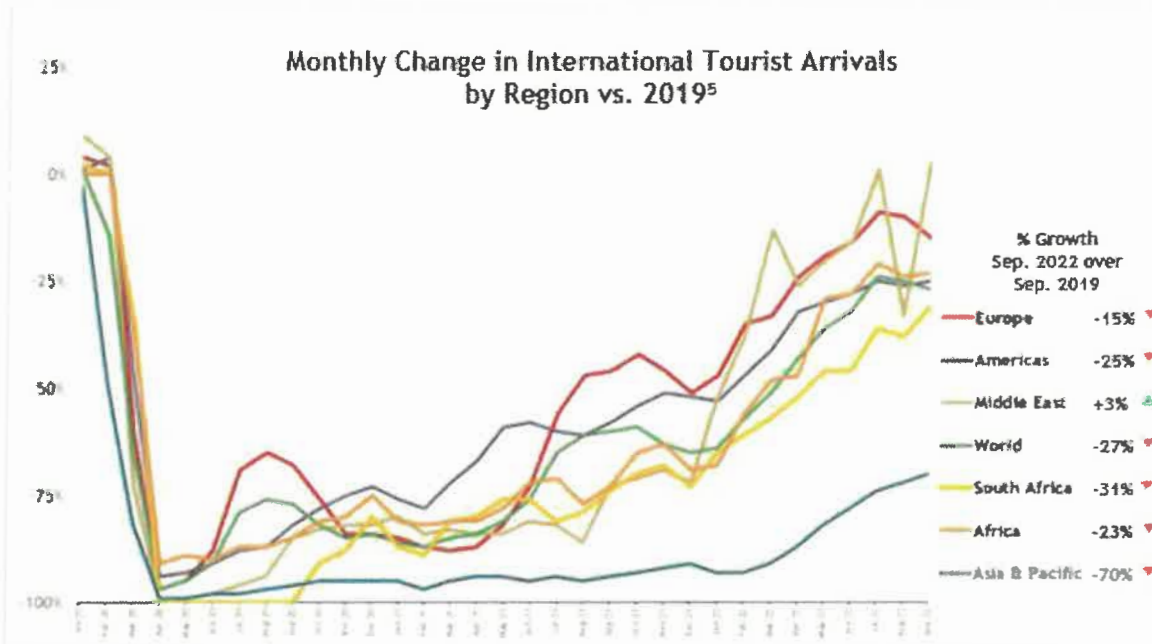
Source: Statistical Release P0351: Tourism and Migration, July - September 2022, Statistics SA.

As can be seen in the graph above, South Africa's international arrivals are well on their way to recovery. Further, for the last three months (July-September 2022), South Africa's arrivals are on average -35% down vs. the same period in 2019. However, they are continuously on the increase with the respective figure for September 2022 showing only a -31% decline.

South Africa's recovery continues to be far better than that of Asia and remains similar to that of the rest of Africa, the Americas, and the world's average. It is still far from Europe's recovery as well as that of the Middle East, although the latter has shown some erratic behaviour lately. Interestingly, for the third quarter of 2022, the Middle East is the first and only region to show positive growth over 2019 since the outbreak of the pandemic.

1.1.2. THE SOUTH AFRICAN TOURISM SECTOR'S ROAD TO RECOVERY

As was reflected in Part A, Section 2.3, when considering the unpredictable and volatile travel environment, the question of where and how to focus efforts on the road to recovery is critical.

Figure 9: Relative Contribution to South Africa's Tourism Spend (ZAR Billions) of Priority Source Markets by Region
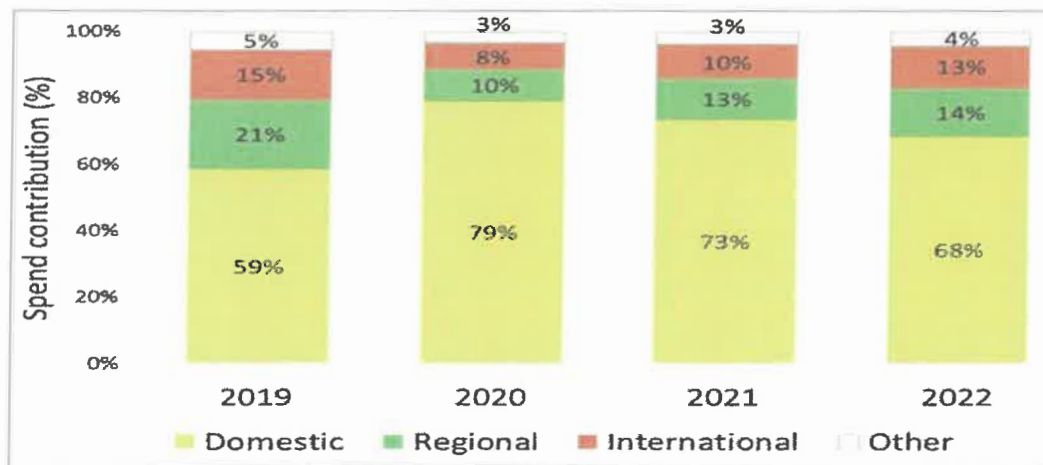
Source: Oxford Economics

The importance of domestic tourism in supporting tourism recovery in the medium term is reflected in the Oxford Economics' forecasts of spend contributions. These predict that domestic and regional markets will contribute 86% of South African tourism spend in 2021 and 82% in 2022. This calls for a drastic reimagination of tourism in South Africa, focusing on servicing and growing domestic and regional tourism to drive the recovery of the tourism sector in the near to medium term.

Figure 10: Percentage Change in Occupancy in 2020
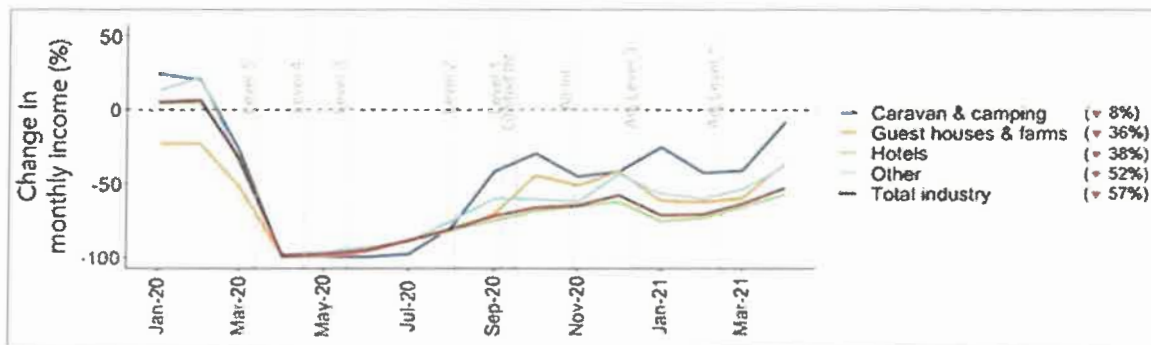
Source: South African Tourism, citing Statistics South Africa Tourism and Migration statistical reports

A further indicator of the importance of domestic and regional tourism in on the ground recovery is evident in the patterns of accommodation occupancies across 2020. Accommodation occupancies plummeted at the onset of lockdown; however, easing of movement restrictions after July 2020 resulted in signs of recovery in all accommodation segments. The observed recovery is attributable primarily to domestic and regional tourism and economic activity since international travel has been minimal.

Figure 11: Global Desirability and Performance, June 2019 to September 2022
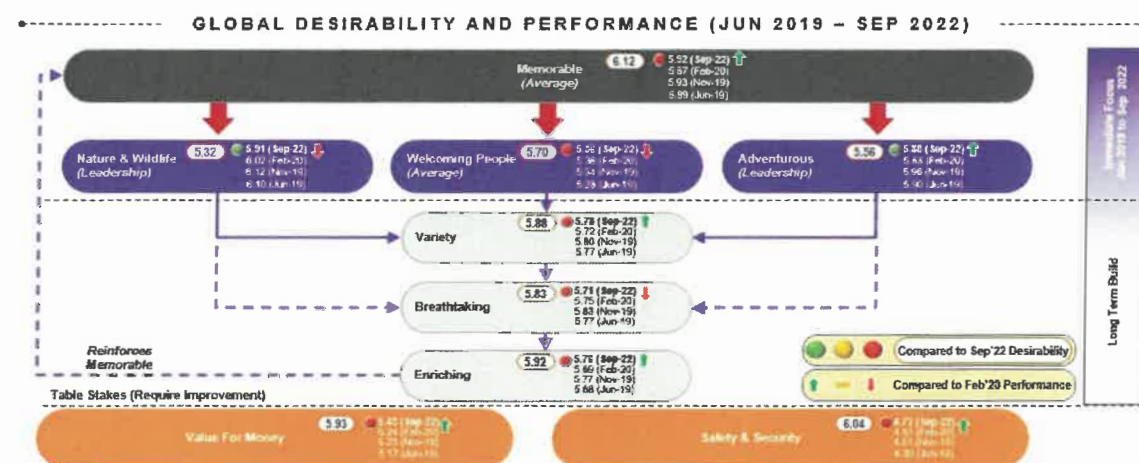
Source: South African Tourism Brand Leisure Tracker September 2022 Wave

South Africa's perception on most of the key attributes has improved since the past wave. 'Safety and security' has been improving consistently over the waves and observed a noticeable improvement since the past wave as well. However, the scores for most of the attributes have been rated below the desirability scores, except 'Nature and Wildlife' and 'Adventurous'.

1.2. INTERNAL ENVIRONMENTAL ANALYSIS

South African Tourism is alert to the fact that the COVID-19 pandemic is merely one of a potential set of disruptive events identified as potentially occurring in the future, all of which have implications for traveller propensity to visit South Africa based on safety and security concerns, climate change, and the rapid advances of technology. For the organisation to anticipate and prepare for these or other unanticipated, significant change events, means shifting its tactical and operational orientation from a reactive to a proactive stance.

South African Tourism recognises that its ability to rapidly adapt its plans to address circumstances in a timeous fashion is a critical success factor for generating impact and fulfilling its role in leading sector recovery. Whilst some of its strengths internally are the pockets of excellence and varied skills sets that exist across the organisation, currently, the target operating model and organisational structure is not optimally designed to support the level of agility demanded by current and future operating contexts. The vacancy rate needs also to be addressed. SA Tourism will therefore focus on these internal weaknesses in the new fiscal as well as striving to create a better place to work for its employees.

South African Tourism will need to shift from destination marketing only to supporting the tourism sector in a much more robust manner. This requires the re-engineering of the analytics and insight capabilities, digital transformation, and driving strategic partnerships and collaboration in a more deliberate manner. In addition, the corporate brand needs to be amplified.

A key initiative in the new fiscal will be the development of a budget optimisation strategy and policy, both of which seek to reduce the reliance of the entity on the fiscus.

1.2.1. SOUTH AFRICAN TOURISM'S STRATEGIC AND TACTICAL FRAMEWORK

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

Figure 12: The Tourism National Policy Framework
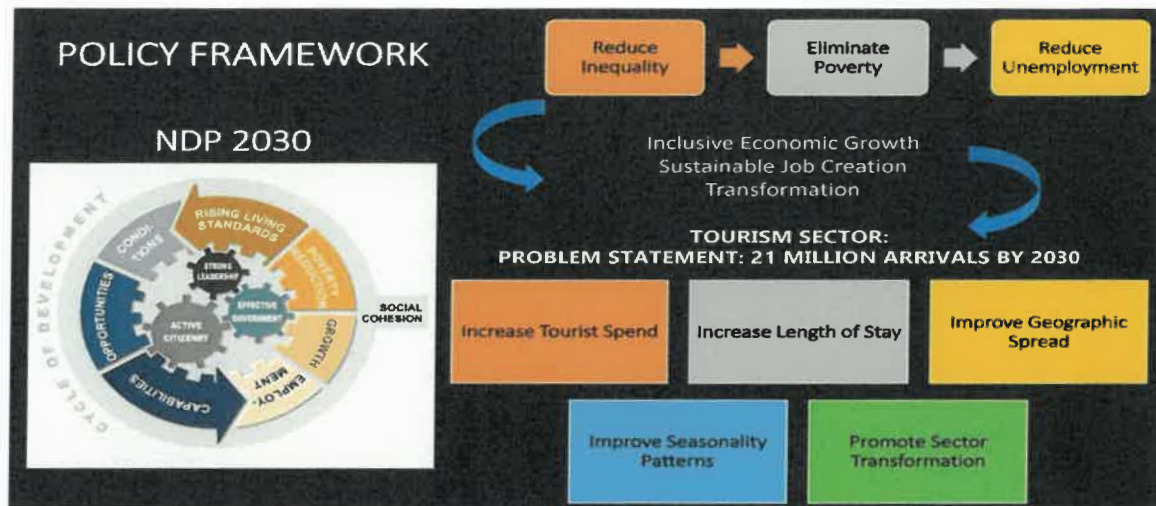
Source: South African Tourism PlanCon, August 2022

In addition, the NTSS sets out a vision for a *'rapidly and inclusively growing tourism economy that leverages South Africa's competitive edge in nature, culture and heritage, underpinned by ubuntu and supported by innovation and service excellence. A top world responsible tourism destination'.*

Key to South African Tourism from the NTSS are the pillars related to effective marketing and the visitor experience. These pillars are driven through Programmes 3: Leisure Tourism Marketing and Programme 5: Tourist Experience.

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

Figure 13: South African Tourism's 2020-2025 Revised 'Strategy on a Page'
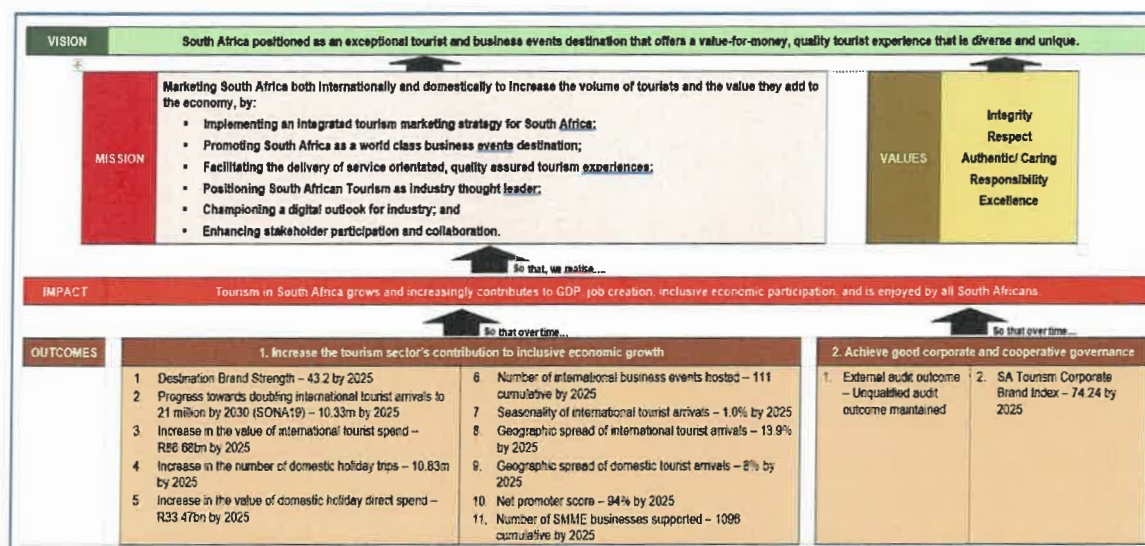
Source: South African Tourism PlanCon, August 2022

The Midterm Assessment of the Five-Year Strategic Plan (2020–2025), in September 2022, finds that the strategic framework remains relevant to inform the work of South African Tourism for the remainder of the term to 2025.

Figure 14: South African Tourism's Tactical Framework to 2025
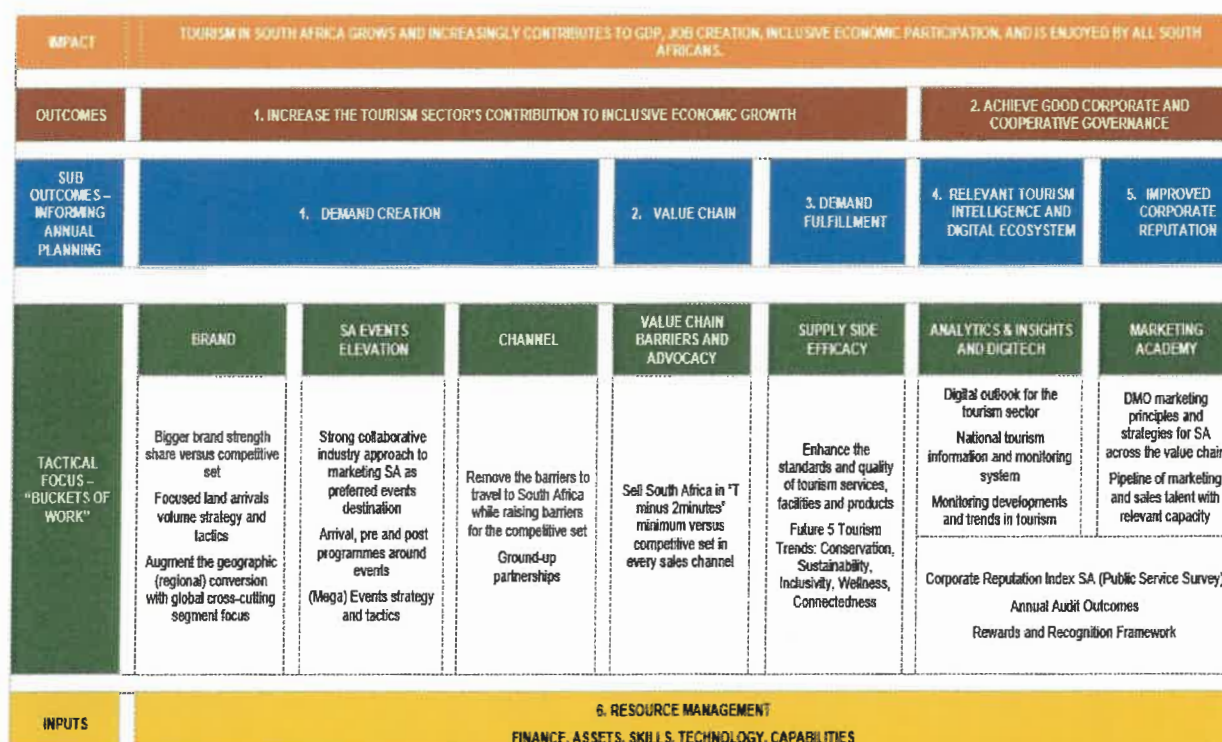
Emerging from robust engagement with its stakeholders in August 2022, seven domains, termed 'buckets of work', were defined that will direct the tactical focus of South African Tourism moving forward. The detail of the above Tactical Framework informs South African Tourism's priorities and focus areas for FY2023/24.

Informed by a situational analysis, and identified problem statements, and derived from engagement with stakeholders, South African Tourism has crafted its response in terms of the sub-outcomes and critical focus areas around which its Annual Performance Plan for FY2023/24 is constructed.

Figure 15: South African Tourism's Principles Guiding the FY2023/24 Annual Performance Plan
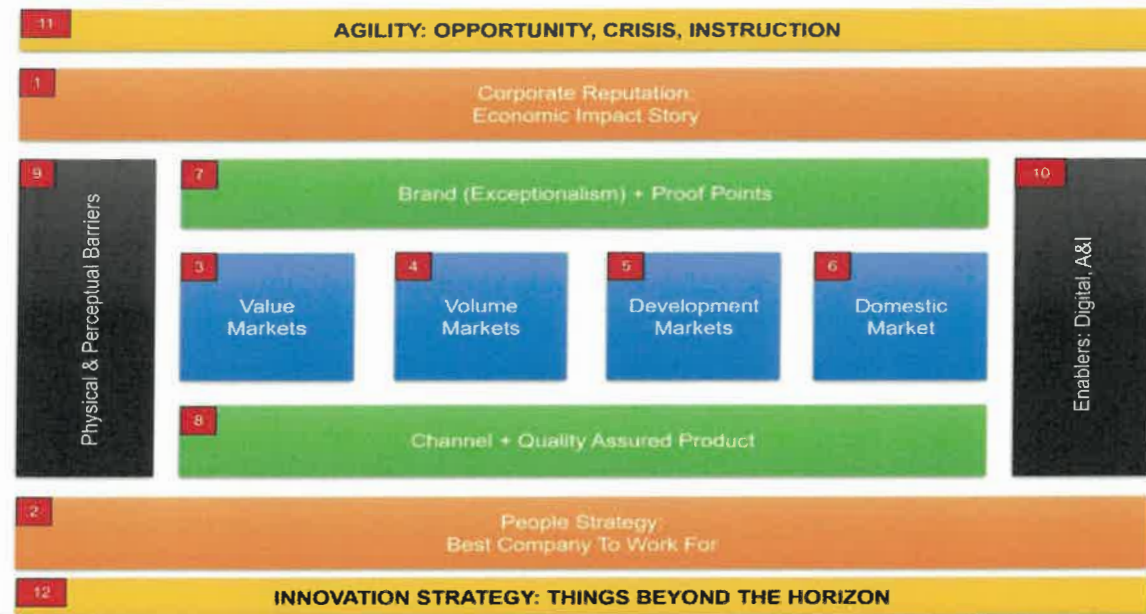
Source: South African Tourism Execution Planning Session, December 2022

Arising from the above, the short and medium-term priorities inform the performance plan for FY2023/24, reflected in Part C.

PART C: MEASURING OUR PERFORMANCE

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

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

The Five-Year Strategic Plan 2020-2025 presents the outcomes for the five years, aligned to the NDP 2030, MTSF 2019-2024, and the TSRP.

1. INSTITUTIONAL PROGRAMME PERFORMANCE INFORMATION

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

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

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

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

Institutional Outcome	Sub-Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)
2. Achieve good corporate and cooperative governance	Improved corporate reputation	External audit outcome	Unqualified audit outcome	Unqualified audit outcome maintained
		South African Tourism Corporate Brand Index	New indicator	74.24 South African Tourism Corporate Brand Index

The FY2023/24 performance plan of Programme 1 is reflected in the log frame tables below:

SOUTH AFRICAN TOURISM

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

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
2. Achieve good corporate and cooperative governance	Improved corporate reputation	2.1. Sound governance and internal control environment	2.1.1. Improved risk maturity level	N/A	N/A	New indicator	Improved risk maturity level from 2 to 3	Improved risk maturity level up from the one level from the prior assessment	Improved risk maturity level up by one level from the prior assessment	Improved risk maturity level up by one level from the prior assessment
			2.1.2 Corporate Compliance Campaign (Operation Clean Audit) implemented	N/A	N/A	N/A	New indicator	FY2023/24 Corporate Compliance Campaign (Operation Clean Audit) implemented	FY2024/25 Corporate Compliance Campaign (Operation Clean Audit) implemented	FY2025/26 Corporate Compliance Campaign (Operation Clean Audit) implemented
			2.1.3. Percentage implementation of valid internal and external audit recommendations	New indicator	95% implementation of valid audit recommendations	100% implementation of valid audit recommendations	100% implementation of valid audit recommendations	100% implementation of valid audit recommendations	100% implementation of valid audit recommendations	100% implementation of valid audit recommendations
		2.2. Optimal Financial management	2.2.1. Percentage payment of compliant invoices within thirty days from date of receipt	100%	100%	100%	100%	100%	100%	100%
			2.2.2. Number of initiatives to promote integrity and ethical conduct in supply chain management (SCM) implemented	N/A	N/A	N/A	New indicator	6 SCM ethics and integrity initiatives implemented	6 SCM ethics and integrity initiatives implemented	6 SCM ethics and integrity initiatives implemented

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
			as per Section 57 of the PFMA							
		2.3. Revenue enhancement and cost optimisation	2.3.1. Budget Optimisation Strategy developed	N/A	N/A	New indicator	Budget optimisation benchmarking study commenced	Finalised Budget Optimisation Strategy	Budget Optimisation Strategy reviewed, approved, and implemented	Budget Optimisation Strategy reviewed, approved, and implemented
		2.4. Human capital management and development	2.4.1. Staff engagement score	3.6 Staff engagement score	3.4 Staff engagement score	3.71 Staff engagement score	2.98 Staff engagement score	3.13 Staff engagement score	3.28 Staff engagement score	3.4 Staff engagement score
			2.4.2. Implementation of Employment Equity (EE) Plan:							
			2.4.2.1. Percentage of women in SA Tourism	60%	63%	67%	60%	60%	60%	60%
			2.4.2.2. Percentage of women in senior and top management positions in SA Tourism	50%	53%	64%	50%	50%	50%	50%
			2.4.2.3. Percentage of people with disabilities employed in SA Tourism	2%	2%	2%	2%	2%	2%	2%
			2.4.2.4. Maintain at least 60% Black people (Africans, Coloureds, and Indians) across all occupational levels	N/A	New indicator	73%	60%	60%	60%	60%

South African Tourism: FY2023/24 Annual Performance Plan

SOUTH AFRICAN TOURISM

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
			2.4.3. Labour Turnover (LTO) as % of average headcount	5.2%	3.5%	3.74%	4.7%	<8%	<8%	<8%
			2.4.4. Vacancies as % of staff establishment	5.7%	12.4%	12.87%	13.0%	<8%	<8%	<8%
2. Achieve good corporate and cooperative governance	Relevant tourism intelligence and digital ecosystem	2.5. ICT Governance Framework and internal controls	2.5.1. ICT Governance Framework implemented	N/A	N/A	New indicator	ICT Governance Framework developed and approved / FY2023/24 implementation roadmap for ICT Governance Framework developed	FY2023/24 Roadmap for ICT Governance Framework implemented	FY2024/25 Roadmap for ICT Governance Framework implemented	FY2025/26 Roadmap for ICT Governance Framework implemented

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

OUTPUT	OUTPUT INDICATORS	2023/24 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2023	Q2 Jul - Sep 2023	Q3 Oct - Dec 2023	Q4 Jan - Mar 2024
2.1. Governance and internal control	2.1.1. Improved risk maturity level	Improved risk maturity level up by one level from the prior assessment	Implement the recommendations from the FY2022/23 Risk Management Maturity Assessment Report	Implement the recommendations from the FY2022/23 Risk Management Maturity Assessment Report	Implement the recommendations from the FY2022/23 Risk Management Maturity Assessment Report Conduct FY2023/24 risk management maturity assessment	Conclude the implementation of the recommendations from the FY2022/23 Risk Management Maturity Assessment Report
	2.1.2. Corporate Compliance Campaign (Operation Clean Audit) implemented	FY2023/24 Corporate Compliance Campaign (Operation Clean Audit) implemented	Implement the Quarter 1 milestones in Corporate Compliance Campaign	Implement the Quarter 2 milestones in Corporate Compliance Campaign	Implement the Quarter 3 milestones in Corporate Compliance Campaign	Implement the Quarter 4 milestones in Corporate Compliance Campaign
	2.1.3. Percentage implementation of valid internal and external audit recommendations	100% implementation of valid audit recommendations	25% implementation of valid audit recommendations	50% implementation of valid audit recommendations	75% implementation of valid audit recommendations	100% implementation of valid audit recommendations
2.2. Financial management	2.2.1. Percentage payment of compliant invoices within thirty days from date of receipt	100% payment of compliant invoices within thirty days from date of receipt	100%	100%	100%	100%

South African Tourism: FY2023/24 Annual Performance Plan

OUTPUT	OUTPUT INDICATORS	2023/24 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2023	Q2 Jul - Sep 2023	Q3 Oct - Dec 2023	Q4 Jan - Mar 2024
	2.2.2. Number of initiatives to promote integrity and ethical conduct in supply chain management (SCM) implemented as per Section 57 of the PFMA	6 SCM ethics and integrity initiatives implemented	Implement in Quarter 1: 1. Letters confirming budget allocation and related accountability issued to business unit managers 2. Capability building for procurement committees 3. Create awareness organisation wide on SCM code of conduct	Implement in Quarter 2: 4. Monitoring of non-compliance to SCM policies and procedures 5. Conduct organisation wide training on Ethics in the Public Service	Implement in Quarter 3: 2. Capability building for procurement committees 4. Monitoring of non-compliance to SCM policies and procedures	Implement in Quarter 4: 4. Monitoring of non-compliance to SCM policies and procedures 6. Conduct organisation wide PFMA training
2.3. Revenue enhancement and cost optimisation	2.3.1. Budget Optimisation Strategy developed	Finalised Budget Optimisation Strategy	Approve Budget Optimisation Strategy	Develop and approve Policy to execute Budget Optimisation Strategy	Develop implementation plan to execute Budget Optimisation Strategy and Policy / Execute implementation plan	Execute implementation plan
2.4. Human capital management and development	2.4.1. Staff engagement score	3.13 Staff engagement score	Develop action plan to address issues arising from the prior year's staff engagement assessment	Implement the action plan	Implement the action plan	Conduct staff engagement assessment to determine staff engagement score / Table Staff Engagement Score Survey Report with ExCo
	2.4.2. Implementation of Employment Equity (EE) Plan:					
	2.4.2.1. Percentage of women in SA Tourism	60%	60%	60%	60%	60%
	2.4.2.2. Percentage of women in senior and top management positions in SA Tourism	50%	50%	50%	50%	50%

SOUTH AFRICAN TOURISM

OUTPUT	OUTPUT INDICATORS	2023/24 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2023	Q2 Jul - Sep 2023	Q3 Oct - Dec 2023	Q4 Jan - Mar 2024
	2.4.2.3. Percentage of people with disabilities employed in SA Tourism	2%	2%	2%	2%	2%
	2.4.2.4. Maintain at least 60% Black people (Africans, Coloureds, and Indians across all occupational levels)	60%	60%	60%	60%	60%
	2.4.3. Labour Turnover (LTO) as % of average headcount	<8%	<8%	<8%	<8%	<8%
	2.4.4. Vacancies as % of staff establishment	<8%	<8%	<8%	<8%	<8%
2.5. ICT Governance and internal controls	2.5.1. ICT Governance Framework implemented	FY2023/24 roadmap for ICT Governance Framework implemented	Implement the Quarter 1 deliverables of the FY2023/24 roadmap of the ICT Governance Framework	Implement the Quarter 2 deliverables of the FY2023/24 roadmap of the ICT Governance Framework	Implement the Quarter 3 deliverables of the FY2023/24 roadmap of the ICT Governance Framework	Implement the Quarter 4 deliverables of the FY2023/24 roadmap of the ICT Governance Framework
						Develop the FY2024/25 roadmap for ICT Governance Framework

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

Enhancing South African Tourism's corporate brand reputation, distinct from the destination brand, will be elevated in the FY2023/24. A central tenant of the corporate brand is a well-governed, well-managed, and credible organisation.

An effective governance and internal control environment, inclusive of risk management, compliance, as well as a compliant and ethical supply chain management, remains a focus as we elevate our efforts to attain a clean audit outcome.

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

The focus for FY2023/24 and beyond is to ensure that South African Tourism deploys its people, processes, and financial resources in order to improve its effectiveness, as well as its cost and operational efficiency across the organisation. South African Tourism will consider new income streams and possible commercialisation of certain services to ensure that adequate financial resources are available for core business functions.

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

1.1.5. PROGRAMME 1: RESOURCE CONSIDERATIONS

Programme 1: Administration	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
(R'000)	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Economic classification:							
Compensation of employees	48,568	54,610	56,794	59,066	61,429	63,886	66,952
Goods and services	75,757	50,773	91,685	91,530	92,453	96,906	101,558
Depreciation	10,846	5,961	6,289	7,498	7,835	8,187	8,580
Total expenses	**135,171**	**111,344**	**154,768**	**158,094**	**161,717**	**168,979**	**177,090**
Staff complement	57						

1.2. PROGRAMME 2: BUSINESS ENABLEMENT

1.2.1. PROGRAMME PURPOSE

The Business Enablement Programme includes the following business units:

Business Unit	Purpose
DigiTech	▪ To enable visualisation and interaction with data obtained from digital channels, dynamic reporting, and data-driven digital marketing execution.
Analytics and Insights	▪ To provide centralised tourism intelligence and establish South African Tourism as a thought leader in the sector.
Industry and Government Relations	▪ To enhance collaboration with various stakeholders.
Global PR and Communications	▪ To showcase South Africa's exceptional experiences and people whilst showcasing South African Tourism and the greater tourism sector's contribution to economic growth and employment.

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

Institutional Outcome	Sub-Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)
2. Achieve good corporate and cooperative governance	Relevant tourism intelligence and digital ecosystem	South African Tourism Corporate Brand Index	New indicator	74.24 South African Tourism Corporate Brand Index

The FY2023/24 performance plan of Programme 2 is reflected in the log frame tables below:

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

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
2. Achieve good corporate and cooperative governance	Relevant tourism intelligence and digital ecosystem	2.6. Integrated Digital and Analytics Operating Framework	2.6.1. Integrated Digital and Analytics Operating Framework annual roadmap implemented	N/A	N/A	New indicator	Integrated Digital and Analytics Operating Framework and annual roadmap implemented	Implementation of Year 2 Roadmap of the Integrated Digital and Analytics Operating Framework	Implementation of Year 3 Roadmap of the Integrated Digital and Analytics Operating Framework	Implementation of Year 4 Roadmap of the Integrated Digital and Analytics Operating Framework
		2.7. Tourism information gathering	2.7.1. Number of tourism information tracking surveys implemented	N/A	N/A	N/A	New indicator	5 tourism information tracking surveys completed	5 tourism information tracking surveys completed	5 tourism information tracking surveys completed
		2.8. Tourism trends analysis	2.8.1. Number of trend analysis reports	N/A	N/A	N/A	New indicator	4 quarterly trend analysis reports	4 quarterly trend analysis reports	4 quarterly trend analysis reports
		2.9. Tourism thought leadership	2.9.1. Number of thought leadership pieces published	N/A	N/A	N/A	New indicator	8 thought leadership pieces published	10 thought leadership pieces published	12 thought leadership pieces published
		2.10. Tourism research	2.10.1. Number of tourism statistics and performance reports	N/A	N/A	N/A	New indicator	4 tourism statistics and performance reports	4 tourism statistics and performance reports	4 tourism statistics and performance reports
	Improved corporate reputation	2.11. Stakeholder management	2.11.1. South African Tourism Corporate Brand Index	N/A	New indicator	Conducted a survey to establish a new baseline for South African Tourism	70.24 South African Tourism Corporate Brand Index	72.24 South African Tourism Corporate Brand Index	74.24 South African Tourism Corporate Brand Index	76.24 South African Tourism Corporate Brand Index

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
						Corporate Brand Index				
		2.12. Organisational environment	2.12.1 Rating of SA Tourism in Best Company to Work for Survey, or equivalent	N/A	N/A	N/A	New indicator	Determine SA Tourism's organisational baseline rating in the Best Company to Work for Survey, or equivalent	Improve SA Tourism's organisational rating in the Best Company to Work for Survey, or equivalent	Improve SA Tourism's organisational rating in the Best Company to Work for Survey, or equivalent
		2.13. Global PR and communications	2.13.1. Annual Global PR and Communications Plan implemented	N/A	N/A	N/A	New indicator	FY2023/24 Global PR and Communications Plan implemented	FY2024/25 Global PR and Communications Plan implemented	FY2025/26 Global PR and Communications Plan implemented

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

OUTPUT	OUTPUT INDICATORS	2023/24 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2023	Q2 Jul - Sep 2023	Q3 Oct - Dec 2023	Q4 Jan - Mar 2024
2.6. Integrated Digital and Analytics Operating Framework	2.6.1. Integrated Digital and Analytics Operating Framework annual roadmap implemented	Implementation of Year 2 Roadmap of the Integrated Digital and Analytics Operating Framework	Implement the Quarter 1 milestones as per the Year 2 Roadmap of the Integrated Digital and Analytics Operating Framework	Implement the Quarter 2 milestones as per the Year 2 Roadmap of the Integrated Digital and Analytics Operating Framework	Implement the Quarter 3 milestones as per the Year 2 Roadmap of the Integrated Digital and Analytics Operating Framework	Implement the Quarter 4 milestones as per the Year 2 Roadmap of the Integrated Digital and Analytics Operating Framework
2.7. Tourism information gathering	2.7.1. Number of tourism information tracking surveys completed	5 tourism information tracking surveys completed		International Leisure Brand Tracker Global Fieldwork Report	International Leisure Brand Tracker Global Fieldwork Report	International Leisure Brand Tracker Global Fieldwork Report
			Departure Survey Fieldwork Report	Departure Survey Fieldwork Report	Departure Survey Fieldwork Report	Departure Survey Fieldwork Report
			Domestic Tourism Survey Fieldwork Report	Domestic Tourism Survey Fieldwork Report	Domestic Tourism Survey Fieldwork Report	Domestic Tourism Survey Fieldwork Report
			-	Business Events Brand Equity Survey Fieldwork Report	Business Events Brand Equity Survey Fieldwork Report	Business Events Brand Equity Survey Fieldwork Report
			-	Domestic Leisure Brand Tracker Fieldwork Report	-	Domestic Leisure Brand Tracker Fieldwork Report
2.8. Tourism trends analysis	2.8.1. Number of trend analysis reports	4 quarterly trend analysis reports	1 Quarterly Trend Analysis Report	1 Quarterly Trend Analysis Report	1 Quarterly Trend Analysis Report	1 Quarterly Trend Analysis Report
2.9. Tourism thought leadership	2.9.1. Number of thought leadership pieces published	8 thought leadership pieces published	2 thought leadership pieces published	2 thought leadership pieces published	2 thought leadership pieces published	2 thought leadership pieces published
2.10. Tourism research	2.10.1. Number of tourism statistics and performance reports	4 tourism statistics and performance reports	1 Tourism Statistics and Performance Report	1 Tourism Statistics and Performance Report	1 Tourism Statistics and Performance Report	1 Tourism Statistics and Performance Report
2.11. Stakeholder management	2.11.1. South African Tourism Corporate Brand Index	72.24 South African Tourism Corporate Brand Index	Develop the improvement plan on the basis of the FY2022/23	Implement the Quarter 2 improvement actions from the	Implement the Quarter 3 improvement actions from the	Conduct FY2023/24 survey, reflecting 72.24 South African

OUTPUT	OUTPUT INDICATORS	2023/24 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2023	Q2 Jul - Sep 2023	Q3 Oct - Dec 2023	Q4 Jan - Mar 2024
			South African Tourism Corporate Brand Index	FY2022/23 South African Tourism Corporate Brand Index	FY2022/23 South African Tourism Corporate Brand Index	Tourism Corporate Brand Index
			Implement the Quarter 1 improvement actions from the FY2022/23 South African Tourism Corporate Brand Index			
2.12. Organisational environment	2.12.1 Rating of SA Tourism in the Best Company to Work for Survey, or equivalent	Determine SA Tourism's organisational baseline rating in the Best Company to Work for Survey, or equivalent	Conduct the Best Company to Work for Survey, or equivalent, for SA Tourism, to determine the organisation's baseline rating	Develop plan of action to improve rating	Implement improvement action plan	Implement improvement action plan
2.13. Global PR and communications	2.13.1. Annual Global PR and Communications Plan implemented	FY2023/24 Global PR and Communications Plan implemented	Develop and approve FY2023/24 Global PR and Communications Annual Plan	Implement the Quarter 2 milestones as per the FY2023/24 Global PR and Communications Plan	Implement the Quarter 3 milestones as per the FY2023/24 Global PR and Communications Plan	Implement the Quarter 4 milestones as per the FY2023/24 Global PR and Communications Plan
			Implement the Quarter 1 milestones as per the FY2023/24 Global PR and Communications Plan			

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

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

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

Technology by itself does not spontaneously bring about business transformation. Instead, a holistic view must be adopted of the organisational system into which technology is introduced. The most important of these is the human dimension, as people are required to harness the technology for value to be derived from the investment. Shifting culture is a complex task that requires the organisation to be supported with the requisite training, change management, and leadership for them to optimise the ways of working.

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

1.2.5. PROGRAMME 2: RESOURCE CONSIDERATIONS

Programme 2: Business Enablement (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Economic classification:							
Compensation of employees	14,717	14,717	15,306	15,918	16,555	17,217	18,043
Goods and services	74,983	25,124	65,679	68,703	71,866	75,174	78,782
Total expenses	**89,700**	**39,841**	**80,985**	**84,621**	**88,421**	**92,391**	**96,826**
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.
Tourism Execution	▪ To create demand through travel acquisition by working with the distribution channels to sell South Africa as a destination.
Global Trade	▪ To participate in the various local and international platforms to connect and promote South Africa as a lucrative destination to international airlines; and ▪ To identify and implement trade tools required for international partners to better sell South Africa and improve conversion.

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

Institutional Outcome	Sub-Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)
1. Increase the tourism sector's contribution to inclusive economic growth	Demand creation	Progress towards doubling international tourist arrivals to 21 million by 2030 (SONA 2019)	10.3 million	10.3 million
		Rand value of international tourist spend	R90.7 billion	R86.7 billion
		Number of domestic holiday trips	7.1 million	10.8 million
		Rand value of domestic holiday direct spend	R17.3 billion	R33.5 billion

The FY2023/24 performance plan of Programme 3 is reflected in the log frame tables below:

SOUTH AFRICAN TOURISM

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

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
1. Increase the tourism sector's contribution to inclusive economic growth	Demand creation	1.1. Global brand campaign	1.1.1. Global Tourism Brand Campaign implemented	N/A	New indicator	FY2021/22 Global Tourism Brand Campaign plan launched and implemented	FY2022/23 Global Tourism Brand Campaign Plan implemented	FY2023/24 Global Tourism Brand Campaign Plan implemented	FY2024/25 Global Tourism Brand Campaign Plan implemented	FY2025/26 Global Tourism Brand Campaign Plan implemented
								3 global tourism campaigns localised in South Africa	3 global tourism campaigns localised in South Africa	3 global tourism campaigns localised in South Africa
								2 global brand collaborations and/or partnerships secured	2 global brand collaborations and/or partnerships maintained	2 global brand collaborations and/or partnerships maintained
			1.1.2. Number of localised brand campaigns implemented in support of the Global Tourism Brand Campaign	N/A	N/A	N/A	New indicator	11 localised brand campaigns implemented	11 localised brand campaigns implemented	11 localised brand campaigns implemented
		1.2. Regional (Africa) Tourism Campaign	1.2.1. Number of regional seasonal campaigns implemented	N/A	N/A	N/A	New indicator	4 regional seasonal campaigns implemented	4 regional seasonal campaigns implemented	4 regional seasonal campaigns implemented
		1.3. Domestic Tourism Campaign	1.3.1. Number of domestic seasonal campaigns implemented	N/A	New indicator	4 domestic deal driven campaigns implemented	3 domestic deal driven campaigns implemented	3 domestic seasonal campaigns implemented	3 domestic seasonal campaigns implemented	3 domestic seasonal campaigns implemented

SOUTH AFRICAN TOURISM

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
		1.4. Global brand affinity initiatives	1.4.1. Number of distribution channel initiatives implemented in market	N/A	N/A	N/A	New indicator	101 distribution channel initiatives implemented in market	101 distribution channel initiatives implemented in market	101 distribution channel initiatives implemented in market
		1.5. Global Trade Programme	1.5.1. Global Trade Programme implemented	N/A	N/A	N/A	New indicator	FY2023/24 Global Trade Plan implemented	FY2024/25 Global Trade Plan implemented	FY2025/26 Global Trade Plan implemented
		1.6. Global Advocacy Programme	1.6.1. Annual Global Advocacy Programme implemented	N/A	N/A	New indicator	Elements of the Global Advocacy Programme implemented	FY2023/24 Global Advocacy Programme implemented	FY2024/25 Global Advocacy Programme implemented	FY2025/26 Global Advocacy Programme implemented
		1.7. Tourism economic impact communication	1.7.1 Number of quarterly tourism economic impact communication activities	N/A	N/A	N/A	New indicator	4 quarterly tourism economic impact communication activities	4 quarterly tourism economic impact communication activities	4 quarterly tourism economic impact communication activities

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

OUTPUT	OUTPUT INDICATORS	2023/24 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2023	Q2 Jul - Sep 2023	Q3 Oct - Dec 2023	Q4 Jan - Mar 2024
1.1. Global tourism brand campaign	1.1.1. Global Tourism Brand Campaign implemented	FY2023/24 Global Tourism Brand Campaign Plan implemented	Finalise the FY2023/24 Global Tourism Brand Campaign Plan	Implement Quarter 2 milestones of FY2023/24 Global Tourism Brand Campaign Plan	Implement Quarter 3 milestones of FY2023/24 Global Tourism Brand Campaign Plan	Implement Quarter 4 milestones of FY2023/24 Global Tourism Brand Campaign Plan
			Launch Live Again 2.0 at Africa's Travel Indaba			
		3 global tourism campaigns localised in South Africa	2 global tourism campaigns localised in South Africa	1 global tourism campaign localised in South Africa	-	-
		2 global brand collaborations and/or partnerships secured	2 global brand collaborations and/or partnerships secured	Roll-out of collaborations and/or partnerships	Roll-out of collaborations and/or partnerships	Roll-out of collaborations and/or partnerships
						Close-out report on each collaboration and/or partnership outlining learnings and ROI
	1.1.2. Number of localised brand campaigns implemented in support of the Global Tourism Brand Campaign	11 localised brand campaigns implemented	Develop the annual localised campaign concept and implementation plan for each hub, as follows: Americas: 2 ▪ North America 1 ▪ South America 1 Asia and Australasia: 4 ▪ India 1 ▪ China 1 ▪ Japan 1	Execute campaign for each hub	Execute campaign for each hub	Execute campaign for each hub
				Campaign progress report per hub	Campaign progress report per hub	Close out report and evaluate ROI per campaign per hub

SOUTH AFRICAN TOURISM

OUTPUT	OUTPUT INDICATORS	2023/24 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2023	Q2 Jul - Sep 2023	Q3 Oct - Dec 2023	Q4 Jan - Mar 2024
			▪ Australia 1 Europe: 4 ▪ UK 1 ▪ South Europe 1 ▪ North Europe 1 ▪ Central Europe 1 Embassy Liaison: 1			
1.2. Regional (Africa) tourism campaign	1.2.1. Number of regional seasonal campaigns implemented	4 regional seasonal campaigns implemented	Develop the annual Africa localised campaign concept and implementation plan	Implement 360° West Africa and Central, East, and Land Africa markets campaigns 1 and 2	Campaigns 1 and 2 close-out reports	Campaign 3 close-out report
			Develop 360° West Africa and Central, East, and Land brand campaigns 1 and 2 concepts	Campaigns 1 and 2 progress reports	Implement a 360° West Africa and Central, East, and Land Africa markets campaign 3	Implement a 360° West Africa and Central, East, and Land Africa markets campaign 4
			-	Develop 360° West Africa and Central, East, and Land Africa markets brand campaign 3 concepts	Campaign 3 progress report	Campaign 4 progress report
			-	-	Develop 360° West Africa and Central, East, and Land Africa markets brand campaign 4 concepts	-
1.3. Domestic tourism campaign	1.3.1. Number of domestic seasonal campaigns implemented	3 domestic seasonal campaigns implemented 1. Sho't Left Travel Week Campaign 2. Summer Deal Driven Campaign	Develop and approve annual seasonal campaign and implementation plan	Implement Sho't Left Travel Week Campaign	Sho't Left Travel Week Campaign close-out report	Sho't Left Summer Deal Driven Campaign close-out report
			Develop and Approve the Sho't Left Travel Week Campaign Concept	Develop and approve the Sho't Left Summer Deals Driven Campaign Concept	Implement Sho't Left Summer Deal Driven Campaign	Implement Sho't Left Easter Deal Driven Campaign

SOUTH AFRICAN TOURISM

OUTPUT	OUTPUT INDICATORS	2023/24 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2023	Q2 Jul - Sep 2023	Q3 Oct - Dec 2023	Q4 Jan - Mar 2024
		3. Easter Deal Driven Campaign	-	-	Develop and approve Sho't Left Easter Deals Driven Campaign concept	Sho't Left Easter Deal Driven Campaign progress report
1.4. Global brand affinity initiatives	1.4.1. Number of distribution channel initiatives implemented in market	101 distribution channel initiatives implemented in market	Implement 24 distribution channel initiatives	Implement 25 distribution channel initiatives	Implement 26 distribution channel initiatives	Implement 26 distribution channel initiatives
1.5. Global Trade Programme	1.5.1. Global Trade Programme implemented	FY2023/24 Global Trade Plan implemented	Implement the Quarter 1 milestones of FY2023/24 Global Trade Plan	Implement the Quarter 2 milestones of FY2023/24 Global Trade Plan	Implement the Quarter 3 milestones of FY2023/24 Global Trade Plan	Implement the Quarter 4 milestones of FY2023/24 Global Trade Plan
1.6. Global Advocacy Programme	1.6.1. Annual Global Advocacy Programme implemented	FY2023/24 Global Advocacy Programme implemented	Implement the Quarter 1 milestones of the Global Advocacy Programme	Implement the Quarter 2 milestones of the Global Advocacy Programme	Implement the Quarter 3 milestones of the Global Advocacy Programme	Implement the Quarter 4 milestones of the Global Advocacy Programme
1.7. Tourism economic impact communication	1.7.1. Number of quarterly tourism economic impact communication activities	4 quarterly tourism economic impact communication activities	1 quarterly tourism economic impact communication activity	1 quarterly tourism economic impact communication activity	1 quarterly tourism economic impact communication activity	1 quarterly tourism economic impact communication activity

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

The Leisure Tourism Marketing Programme leads the execution on the policy directive to revitalise the destination brand and deliver 21 million tourist arrivals by 2030.

Tourism Decision Metrics (TDM), the forecasting tool developed by Oxford Economics and used by South African Tourism, estimated that South Africa would receive 16,5 million arrivals in 2030, or 0.74% of global market share if specific interventions are not made to grow tourism. This was prior to the COVID-19 pandemic, which has significantly affected those projections. The revised post-COVID-19 projections now stand at 14,8 million arrivals in 2030. A new growth approach critical to achieve any additional tourist arrivals beyond those reflected by the projections.

In this regard, South African Tourism will continue to prioritise domestic tourism, followed by regional and then international tourism. Key to this will be the Global Tourism Brand Campaign that seeks to ensure that South Africa is embedded as a top-of-mind destination for all potential tourists. The global brand campaign will be localised for each of destination South Africa's priority source markets.

Through the Global Trade component, South African Tourism will continue to participate in various local and intentional platforms to connect and promote South Africa as a lucrative destination to international airlines. In addition, South African Tourism will continue to participate in the provincial air access forums to ensure that insights into inbound global markets are made available to support efforts to secure new entrants.

1.3.5. PROGRAMME 3: RESOURCE CONSIDERATIONS

Programme 3: Leisure Tourism Marketing	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
(R'000)	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Economic classification:							
Compensation of employees	108,916	119,163	123,929	128,887	134,042	135,702	142,216
Goods and services	954,777	260,237	917,296	937,036	937,118	983,565	1,026,281
Depreciation	2,909	3,069	3,238	3,364	3,515	3,673	3,849
Total expenses	**1,066,602**	**382,469**	**1,044,463**	**1,069,287**	**1,074,675**	**1,122,941**	**1,172,346**
Staff complement	95						

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

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

The FY2023/24 performance plan of Programme 4 is reflected in the log frame tables below:

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

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
				2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
1. Increase the tourism sector's contribution to inclusive economic growth	Demand creation	1.8. B2B Brand Campaign	1.8.1. Number of B2B brand campaigns implemented	N/A	New indicator	1 Domestic B2B Campaign implemented	1 Domestic B2B Campaign implemented	1 Domestic B2B Campaign implemented	1 Domestic B2B Campaign implemented	1 Domestic B2B Campaign implemented
						1 Global B2B Campaign implemented	1 Global B2B Campaign implemented	1 Global B2B Campaign implemented	1 Global B2B Campaign implemented	1 Global B2B Campaign implemented
		1.9. Business Events bidding platform	1.9.1. Number of bid submissions	115 bid submissions	55 bid submissions	84 bid submissions	93 bid submissions	93 bid submissions	107 bid submissions	123 bid submissions
			1.9.2. Number of business events hosted in VTSDs	N/A	New indicator	3 business events piloted in VTSDs	5 business events hosted in VTSDs	5 business events hosted in VTSDs	8 business events hosted in VTSDs	10 business events hosted in VTSDs
			1.9.3. Number of business events bidding impact reports	N/A	N/A	N/A	New indicator	4 Business events bidding impact reports	4 Business events bidding impact reports	4 Business events bidding impact reports
		1.10. Strategic platforms	1.10.1. Africa's Travel Indaba hosted	N/A	New indicator	Hosting of Meetings Africa 2022 (No Africa's Travel Indaba in 2021)	Hosting of Africa's Travel Indaba 2022 and Meetings Africa 2023	Hosting of Africa's Travel Indaba 2023 Reimagined	Hosting of Africa's Travel Indaba 2024	Hosting of Africa's Travel Indaba 2025
			1.10.2. Meetings Africa hosted	N/A	New indicator			Hosting of Meetings Africa 2024 Reimagined	Hosting of Meetings Africa 2025	Hosting of Meetings Africa 2026
			1.10.3 Number of international strategic platforms participated in	N/A	N/A	N/A	New indicator	6 international strategic platforms participated in	6 international strategic platforms participated in	6 international strategic platforms participated in

South African Tourism: FY2023/24 Annual Performance Plan

SOUTH AFRICAN TOURISM

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

OUTPUT	OUTPUT INDICATORS	2023/24 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2023	Q2 Jul - Sep 2023	Q3 Oct - Dec 2023	Q4 Jan - Mar 2024
1.8. Business to Business (B2B) Brand Campaign	1.8.1. Number of B2B brand campaigns implemented	1 Domestic B2B Campaign implemented	Approved Domestic B2B Campaign Plan	Implement Quarter 2 milestones in approved Domestic B2B Campaign Plan	Implement Quarter 3 milestones in approved Domestic B2B Campaign Plan	Implement Quarter 4 milestones in approved Domestic B2B Campaign Plan
		1 Global B2B Campaign implemented	Approved Global B2B Campaign Plan	Implement Quarter 2 milestones in approved Global B2B Campaign Plan	Implement Quarter 3 milestones in approved Global B2B Campaign Plan	Implement Quarter 4 milestones in approved Global B2B Campaign Plan
1.9. Business Events bidding platform	1.9.1. Number of bid submissions	93 bid submissions	33 bid submissions	30 bid submissions	15 bid submissions	15 bid submissions
	1.9.2. Number of business events hosted in VTSDs	5 business events hosted in VTSDs	1 business event hosted in VTSD	2 business events hosted in VTSDs	1 business event hosted in VTSDs	1 business event hosted in VTSDs
	1.9.3. Number of business events bidding impact reports	4 business events bidding impact reports	Quarter 1 Business Events Bidding Impact Report	Quarter 2 Business Events Bidding Impact Report	Quarter 3 Business Events Bidding Impact Report	Quarter 4 Business Events Bidding Impact Report
1.10. Strategic platforms	1.10.1. Africa's Travel Indaba (ATI) hosted	Hosting of Africa's Travel Indaba 2023 Reimagined	Hosting of Africa's Travel Indaba 2023 Reimagined	Post-Show Economic Impact Study briefing	Planning for Africa's Travel Indaba 2024 Reimagined - Communication Strategy formulation	Planning for Africa's Travel Indaba 2024 Reimagined and opening of registration
	1.10.2. Meetings Africa (MA) hosted	Hosting of Meetings Africa 2024 Reimagined	Post-Show Economic Impact Study briefing	Planning for Meetings Africa 2024 Reimagined – Communication Strategy formulation	Planning for Meetings Africa 2024 Reimagined and opening of registration	Hosting of Meetings Africa 2024 Reimagined
	1.10.3 Number of international strategic platforms participated in	6 international strategic platforms participated in	Plan for and participate at 2 international strategic platforms: ATM and IMEX Frankfurt	Plan for IMEX America, IBTM and WTM	Participate at 3 international strategic platforms: IMEX America, IBTM and WTM	Plan for and participate at 1 international strategic platform: ITB Berlin

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

The South Africa National Convention Bureau actively seeks to develop leads for future business events so that South Africa can continuously enhance its bidding pipeline.

Business development is one of the key strategies to maintain South Africa's position as the number one business events destination in Africa and the Middle East, and to retain the destination's competitive advantage in the global business events sector. Thus, the SANCB lends its support across the bidding process, focusing on key economic sectors, to maximise South Africa's chances of winning the rights to host business events.

A key initiative that will continue in the FY2023/24 is hosting business events in villages, towns and small dorpies (VTSDs), thereby aiding economic impact in the less-visited areas throughout the country. These bidding opportunities for the VSTDs are undertaken with the support of the provincial and city convention bureaus.

For the medium to longer term, the SANCB will continue its focus on demand creation and bid support globally, as it focuses on bids for future MICE events within the six focus sectors of the SANCB. This aligns with the Joint Meeting Industry Council (JMIC) Global Manifesto of 2020, which is the industry rationale for using business events as a primary agent for post-pandemic economic recovery and renewal.

1.4.5. PROGRAMME 4: RESOURCE CONSIDERATIONS

Programme 4: Business Events	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
(R'000)	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Economic classification:							
Compensation of employees	12,833	12,833	13,347	13,880	14,436	15,013	15,7336
Goods and Services	124,855	18,003	74,912	78,342	81,927	85,676	89,7884
Total expenses	**137,689**	**30,836**	**88,259**	**92,222**	**96,363**	**100,689**	**105,5221**
Staff complement	17						

1.5. PROGRAMME 5: TOURIST EXPERIENCE

1.5.1. PROGRAMME PURPOSE

The Tourist Experience Programme includes the following business units:

Business Unit	Purpose
Quality Assurance and Development	• To grow the number of graded properties across South Africa, which will improve overall perceptions of South Africa as a quality destination that offers a diverse, unique, and enriched variety of products and price points for tourists.
Visitor Experience	• To enable the travel trade and associated partners to deliver world-class, warm, friendly, and efficient services to tourists from the ports of entry to the various tourism value touch points; and • To recognise and celebrate tourism businesses for tourism excellence, for their contribution to South Africa's global competitiveness, and for growing tourism's contribution towards GDP and job creation.
Brand Experience	• To seek new offerings, products, and operators to package in exciting itineraries for the use of South African Tourism hosting needs; and • To enable inclusive growth through itineraries that incorporate emerging/transformed businesses, encourage geographic spread across the country, and address the misperceptions associated with seasonal travel.

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

Institutional Outcome	Sub-Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)
1. Increase the tourism sector's contribution to inclusive	Demand fulfilment	Seasonality of tourist arrivals	1.3%	1.0%
		Geographic spread of international tourist arrivals	20%	13.9%

Institutional Outcome	Sub-Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)
economic growth		Geographic spread of domestic tourist arrivals	8%	8%
		Net Promoter Score	91%	-
		Number of SMME businesses supported	182	1 096

(Cumulative 2020/21-2024/25)

(Through both Business Events platforms and Visitor Experience events and hosting itineraries) |

The FY2023/24 performance plan of Programme 5 is reflected in the log frame tables below:

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

OUTCOME	SUB-OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE		MTEF TARGETS	
				2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
1. Increase the tourism sector's contribution to inclusive economic growth	Demand fulfilment	1.11. Quality assured visitor services	1.11.1. Number of graded establishments	5 173	-	4 707	5 355	5 462	5 625	5 805
			1.11.2. Reviewed grading model and TGCSA Value Proposition implemented	N/A	N/A	New indicator	Grading business model and TGCSA Value Proposition revised	Implementation of 2023/24 milestones in the grading model and TGCSA Value Proposition Roadmap	Implementation of 2024/25 milestones in the grading model and TGCSA Value Proposition Roadmap	Implementation of 2025/26 milestones in grading model and TGCSA Value Proposition Roadmap
		1.12. Destination proposition enhancement	1.12.1. Product proposition implemented	N/A	N/A	N/A	New indicator	Product proposition developed / Product Proposition Roadmap implemented	Product Proposition Roadmap implemented	Product Proposition Roadmap implemented
		1.13. Quality Assurance in Tourism Value Chain	1.13.1. Three-Year Tourism Value Chain and Barrier Strategy implemented	N/A	N/A	N/A	New indicator	Three-Year Tourism Value Chain Strategy developed / Three-Year Tourism Value Chain Strategy Roadmap developed	Implementation of Three-Year Tourism Value Chain Strategy Roadmap	Implementation of Three-Year Tourism Value Chain Strategy Roadmap

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

OUTPUT	OUTPUT INDICATORS	2023/24 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2023	Q2 Jul - Sep 2023	Q3 Oct - Dec 2023	Q4 Jan - Mar 2024
1.11. Quality assured visitor services	1.11.1. Number of graded establishments	5 462 graded establishments	1 356	2 713	4 070	5 462
	1.11.2. Reviewed grading model and TGCSA Value Proposition implemented	Implementation of FY2023/24 milestones in the grading model and TGCSA Value Proposition Roadmap	Implement Quarter 1 milestones in the grading model and TGCSA Value Proposition Roadmap	Implement Quarter 2 milestones in the grading model and TGCSA Value Proposition Roadmap	Implement Quarter 3 milestones in the grading model and TGCSA Value Proposition Roadmap	Implement Quarter 4 milestones in the grading model and TGCSA Value Proposition Roadmap
1.12. Destination proposition enhancement	1.12.1. Product proposition implemented	Product proposition developed	Develop Product Proposition	-	-	-
		Product Proposition Roadmap implemented	-	Develop Product Proposition Roadmap	Implement Quarter 3 milestones of Product Proposition Roadmap	Implement Quarter 4 milestones of Product Proposition Roadmap
1.13. Quality Assurance in Tourism Value Chain	1.13.1. Three-Year Tourism Value Chain and Barrier Strategy implemented	Three-Year Tourism Value Chain Strategy developed	Develop Three-Year Tourism Value Chain Strategy	Approve Three-Year Tourism Value Chain Strategy	-	-
		Three-Year Tourism Value Chain Strategy Roadmap developed	-	-	-	Develop Three-Year Tourism Value Chain Strategy Roadmap

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

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

Travel is about inclusive growth, not only for those that are in the tourism sector, but any South African that has experiences to share and knowledge that contributes positively to the consumer travel experience. For FY2023/24 and beyond, a specific focus will be on finalising and implementing the findings of the review of the grading system, which will include emerging product and accommodation SMMEs. Greater emphasis will be placed on assisting new entrants to be more sustainable with projects to support emerging participants in their quality assurance journey. Visitor Experience will focus on enabling the travel trade and associated partners to deliver world-class, friendly, and efficient services to tourists. The Welcome Programme toolkit will be enhanced to assist with targeted training of the travel trade and associated partners and to encourage profound immersive experiences through tour guides.

Focus will be given to reprioritising the distribution channel to build their knowledge and familiarity of South Africa leisure and business event experiences through reinvented tools and platforms that are in line with the evolution of the consumer.

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

1.5.5 PROGRAMME 5: RESOURCE CONSIDERATIONS

Programme 5: Tourist Experience	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
(R'000)	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Economic classification:							
Compensation of employees	17,209	17,209	18,069	18,973	19,732	20,521	21,506
Goods and services	51,487	17,278	31,078	32,381	33,928	35,548	37,254
Total expenses	**68,695**	**34,487**	**49,147**	**51,354**	**53,659**	**56,069**	**58,760**
Staff complement	22						

2. CONSOLIDATED FINANCIAL PLAN AND 2023/24 MTEF BUDGET ESTIMATES

2.1. PROJECTED REVENUE FOR 2023/24 MTEF

Revenue (R'000)	2019/20 Audited	2020/21 Audited	2021/22 Audited	2022/23 Approved	2022/23 Special Adjustments	2022/23 Revised Budget	2023/24 Estimate	2024/25 Estimate	2025/26 Estimate
DT allocation	1,256,523	438,306	1,297,038	1,329,206	0	1,329,206	1,344,672	1,405,061	1,468,008
TOMSA levies	133,304	0	50,000	52,400	0	52,400	53,972	56,395	59,102
Indaba Meetings Africa and other exhibitions	110,189	680	33,498	33,757	0	33,757	34,372	35,927	37,652
Grading fees	23,164	0	12,239	12,826	0	12,826	13,210	13,804	14,467
Sundry revenue	22,498	0	24,847	27,389	0	27,389	28,608	29,881	31,315
TOTAL	1,545,678	438,986	1,417,622	1,455,578	0	1,455,578	1,474,834	1,541,068	1,610,544

2.2. PROJECTED EXPENDITURE FOR 2023/24 MTEF

	Name of the Programme	2019/20 Audited (R'000)	2020/21 Audited (R'000)	2021/22 Audited (R'000)	2022/23 Approved Budget (R'000)	2022/23 Special Adjustments (R'000)	2022/23 Revised Budget (R'000)	2023/24 Budget (R'000)	2024/25 Budget (R'000)	2025/26 Budget (R'000)
1	Corporate Support	15,219	111,344	154,768	154,769	0	154,769	161,718	168,979	177,090
2	Business Enablement	79,059	39,841	80,985	84,621	0	84,621	88,421	92,391	96,826
3	Leisure Tourism Marketing	948,603	382,469	1,051,113	1,072,614	0	1,072,614	1,074,674	1,122,941	1,172,346
4	Business Events	178,855	30,836	88,259	92,222	0	92,222	96,363	100,689	105,522
5	Tourist Experience	77,021	34,487	49,147	51,354	0	51,354	53,659	56,069	58,760
	Total	1,298,757	598,977	1,424,272	1,455,579	0	1,455,578	1,474,834	1,541,068	1,610,544

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

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

Outcome	Key Risk	Risk Mitigation
1. Increase the tourism sector's contribution to inclusive economic growth.	Inability of tourists to access the country.	▪ Hybrid trade show platform for Africa's Tourism Indaba and Meetings Africa. ▪ Improve brand strength index and brand reputation. ▪ Development of global marketing strategy and plan. ▪ Development of communication strategy and plan. ▪ Development of Communications Command Centre in collaboration with the Department of Tourism. ▪ Technology hub/citizen-driven marketing UGC and itinerary engineering.
	Difficulty for domestic travellers to access tourism experiences.	▪ Implement domestic-related campaigns and distribution channel projects.
	Safety and security of tourists in South Africa.	▪ Traveller education and citizen mobilisation using tourism recovery as a trigger. ▪ Collaboration with security cluster across the tourism value chain.
	Inadequacy of national infrastructure capacity and quality readiness.	▪ Working together with the Department of Tourism to better utilise and make data available. ▪ Strengthen trade partnerships (i.e., airlines, etc.) ▪ Provincial tourism authorities to include plans to ensure a quality assured destination.
2. Achieve good corporate and cooperative governance.	Ease of accessibility of South African Tourism insights and other relevant information.	▪ Packaging and corporate communications of insights performance reports. ▪ Development of a formalised data strategy. ▪ Development of a data hub to enable centralisation of relevant information. ▪ Develop, consolidate and maintain digital platforms.
	Cybersecurity risks - data protection and ICT security.	▪ Implementation of upgraded, consolidated, and enhanced ICT security. ▪ Development of ICT Security Framework, Network and Privilege, Access Management System, Endpoint Detection and Response

Outcome	Key Risk	Risk Mitigation
		System, Security Information, and Events Management System.
		▪ Cyber risk quantification.
		▪ Implement training and awareness campaigns on ICT security.
	Uncertainty of changes in national policies, which may impact tourism.	▪ Whole of State Approach to Tourism initiative.
	Findings due to a weak internal control environment.	▪ Establish control maturity framework and determine targeted level for South African Tourism control environment maturity.
		▪ Implement training and awareness campaigns on anti-fraud and corruption.
	Inability to execute mandate due to limited financial resources.	▪ Partnerships and leveraging South African Tourism brand strength to optimise limited budget.
		▪ Continuous monitoring and tracking of current expenditure.
		▪ Exploration of a project to be a revenue-generating entity.
	Retention of the workforce.	▪ Engagement on informal and formal programmes available for learning, development, and coaching.
		▪ Recruitment of vacant critical positions.
		▪ Continuous implementation of Employee Assistance Programme.
	High executive staff turnover.	▪ Development and effective implementation of South African Tourism Succession Plan.

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 2.1.1	Improved risk maturity level
Definition	The Risk Maturity Model is an assessment tool focused on the organisation's risk culture and the development of the organisation's Risk Management Programme. It evaluates the extent to which risk management is embedded within the organisation, where a high maturity level translates into effective risk management. Year on year SA Tourism plans to improve the organisation's risk maturity level from the level determined in the prior assessment.
Source of Data	▪ FY2022/23 Risk Management Maturity Assessment Report. ▪ FY2023/24 Risk Management Maturity Assessment Report. ▪ Quarterly Governance, Risk and Compliance reports.
Method of Calculation / Assessment	Assessment of progress on a quarterly basis on the implementation of the recommendations from the FY2022/23 and FY2023/24 risk management maturity assessment reports.
Means of Verification	Verify that the: ▪ FY2022/23 Risk Management Maturity Assessment Report was available by March 2023. ▪ FY2023/24 Risk Management Maturity Assessment Report was available in Quarter 3 of FY2023/24. ▪ Quarterly Governance, Risk and Compliance Reports outline progress on the implementation of the recommendations arising from the risk management maturity assessment reports, and were approved by the Head: Governance, Risk and Compliance, within five calendar days after the end of each quarter.
Assumptions	The recommendations arising from the FY2022/23 and FY2023/24 risk management maturity assessment reports are actionable.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Higher than targeted performance is desirable.

Indicator Responsibility	Divisional Head: Governance, Risk, Compliance

Indicator Title 2.1.2	Corporate Compliance Campaign (Operation Clean Audit) implemented
Definition	SA Tourism will conceptualise and implement a campaign that promotes the organisation's efforts and results with regards to improving corporate compliance that intends to build SA Tourism's corporate brand and works towards a clean audit outcome. These efforts will focus on enhancing and maintaining a sound control environment in financial health, supply chain management and human capital, striving for greater accuracy in the annual financial statements and performance reporting, and improving the information technology environment.
Source of Data	▪ Quarterly plan for the Corporate Compliance Campaign. ▪ Quarterly report on the Corporate Compliance Campaign.
Method of Calculation / Assessment	Assessment of progress on the implementation of the approved quarterly plan for the Corporate Compliance Campaign.
Means of Verification	Verify that the: ▪ Quarterly plan for the Corporate Compliance Campaign was developed and approved by the CEO within the first month of each quarter. ▪ Quarterly report on the Corporate Compliance Campaign outlines progress against the quarterly plan and was approved by the CEO within five days of the end of each quarter.
Assumptions	Management executes the quarterly plans timeously.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operations Officer

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

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

Method of Calculation / Assessment	Liquidity ratio: Creditor's payment period.
Means of Verification	Verify that the quarterly consolidated trial balance accurately reflects the creditor's payment period.
Assumptions	Payment for goods and services from government institutions and those with different payment terms will be executed.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Non-cumulative.
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Financial Officer.

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

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

Indicator Title 2.3.1	Budget Optimisation Strategy developed
Definition	The Budget Optimisation Strategy will outline the organisation's approach to enhancing revenue generation and cost optimisation to reduce the organisation's reliance on the fiscus.
Source of Data	▪ Budget Optimisation Strategy. ▪ Policy linked to Budget Optimisation Strategy. ▪ Implementation Plan. ▪ Quarterly Finance and SCM Reports which outline progress made on the implementation plan, in Quarters 3 and 4.
Method of Calculation / Assessment	Assessment of progress against: ▪ Budget Optimisation Strategy approved in line with the SA Tourism Delegations of Authority by the end of Quarter 1. ▪ Policy linked to Budget Optimisation Strategy approved in line with the SA Tourism Delegations of Authority by the end of Quarter 2. ▪ Implementation Plan to execute the Budget Optimisation Strategy and Policy, approved by the end of Quarter 3. ▪ Quarterly Finance and SCM Reports, approved by the Chief Financial Officer, within 5 days after the end of each quarter, which outline progress made on the Implementation Plan, in Quarters 3 and 4.
Means of Verification	Verify that the: ▪ Budget Optimisation Strategy was approved in line with the SA Tourism's Delegation of Authority by the end of Quarter 1. ▪ Policy linked to the Budget Optimisation Strategy was approved in line with the SA Tourism's Delegation of Authority by the end of Quarter 2. ▪ Implementation Plan to execute the Budget Optimisation Strategy and Policy was approved in line with the SA Tourism's Delegation of Authority by the end of Quarter 3. ▪ Quarterly Finance and SCM Reports outline progress made on the implementation plan in Quarters 3 and 4 and were approved by the Chief Financial Officer within five days after the end of each quarter.
Assumptions	The policy environment allows for significant investments into the public entity.

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

Indicator Title 2.4.1	Staff engagement score
Definition	A staff engagement score is a measure of the engagement levels of staff on an annual basis. This is a measure of the culture of the organisation. The higher the engagement, the more satisfied staff tend to be.
Source of Data	FY2023/24 annual Staff Engagement Survey Report.
Method of Calculation / Assessment	Survey questions measures based on engagement scale ranging from strongly disagree to strongly agree on clustered survey questions. The combined agree scores determine engagement. This Employee Engagement Survey is based on the service provider's employee engagement model, which has been validated over nine years, across over 6,000 organisations.
Means of Verification	Verify that the FY2023/24 annual Staff Engagement Survey Report was tabled at ExCo before the end of Quarter 4 and reflects the staff satisfaction score.
Assumptions	Human Capital Strategy is implemented.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operations Officer.

Indicator Title 2.4.2	Implementation of Employment Equity (EE) Plan: • **Percentage of women in South African Tourism** • **Percentage of women in senior and top management positions in South African Tourism** • **Percentage of people with disabilities employed in South African Tourism** • **Maintain at least 60% Black people (Africans, Coloureds, and Indians across all occupational levels)**
Definition	Employment Equity Plan (EEP) is developed in accordance to Section 20 of the Employment Equity Act (EEA) of 1998.
Source of Data	Headcount and Payroll Report.
Method of Calculation / Assessment	Assessment of progress against approved Employment Equity Plan and comparison of progress against national economically active population (EAP) targets. Alignment to the EAP for the purposes of the numerical targets will be considered. Quarterly performance will be calculated as follows: • Percentage of women in South African Tourism: Number of women employed divided by total headcount, expressed as a percentage. • Percentage of women in senior and top management positions in South African Tourism: Number of women employed in senior and top management positions divided by total number of senior and top management positions, expressed as a percentage. • Percentage of people with disabilities employed in South African Tourism: Number of people with disabilities employed divided by total headcount, expressed as a percentage. • Maintain at least 60% Black people (Africans, Coloureds, and Indians across all occupational levels): Number of Black people employed divided by total headcount, expressed as a percentage.
Means of Verification	Verify the EEA1 Form completion by all staff.
Assumptions	• Accuracy of employment equity data provided by employees. • Accuracy of data capturing of employment equity data at onboarding.
Disaggregation of Beneficiaries (where applicable)	As defined by the approved South African Tourism Employment Equity Plan, specific targets are set as follows: • Women employed – 60% of headcount • Women in senior and top management – 50% of total positions • People with disabilities employed – 2% of headcount • Black persons employed – 60% of headcount
Spatial Transformation (where applicable)	Not applicable

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

Indicator Title 2.4.3	Labour Turnover (LTO) as % of average headcount
Definition	Labour turnover (LTO) is calculated as a percentage of the average headcount in the organisation at the time.
Source of Data	Quarterly Headcount and Payroll Report.
Method of Calculation / Assessment	Labour turnover (LTO) calculation: percentage of the average headcount in the organisation at the time.
Means of Verification	Verify the Quarterly Headcount and Payroll Report, and that it was submitted five days after the end of each quarter.
Assumptions	Assessment of progress against accuracy of Headcount and Payroll Report data.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operations Officer.

Indicator Title 2.4.4	Vacancies as % of staff establishment
Definition	Vacancies in the organisation on the approved staff establishment as a percentage of headcount.
Source of Data	• Headcount and Vacancy Report. • Approved organogram.
Method of Calculation / Assessment	Calculation: Vacancies in the organisation on the approved staff establishment, expressed as a percentage of headcount.

Means of Verification	Verify the Headcount and Vacancy Report against the approved organogram.
Assumptions	No moratorium or restrictions on recruitment in place.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Operations Officer.

Indicator Title 2.5.1	ICT Governance Framework implemented
Definition	The ICT Governance Framework is defined as the processes that ensure the effective and efficient use of ICT in enabling South African Tourism to achieve its goals and objectives. The ICT Governance Framework will ensure the effective evaluation, selection, prioritisation, and funding of competing ICT investments; administer their implementation; and extract quantifiable business benefits.
Source of Data	▪ Approved ICT Governance Framework and Implementation Roadmap. ▪ Approved Master System Plan (ICT Strategy).
Method of Calculation / Assessment	Assessment of progress of the number of ICT Governance initiatives implemented per quarter in line with the approved ICT Governance Framework and Implementation Roadmap.
Means of Verification	Verify that the: ▪ ICT Governance Framework and Implementation Roadmap, which outlines the planned activities per quarter, were approved in line with the South African Tourism's Delegation of Authority. ▪ Quarterly DigiTech Reports reflect the progress against the approved ICT Governance Framework and Implementation Roadmap and were approved by the Chief Digital Transformation Officer within five days after the end of the quarter. ▪ The monthly Internal Audit Tracker of ICT findings.
Assumptions	The ICT Governance Framework and the Implementation Roadmap are approved.

Indicator Title 2.5.1	ICT Governance Framework implemented
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per defined targets.
Indicator Responsibility	Divisional Head: Chief Digital Transformation Officer.

2. PROGRAMME 2: BUSINESS ENABLEMENT

Indicator Title 2.6.1	Integrated Digital and Analytics Operating Framework Annual Roadmap implemented
Definition	The Integrated Digital and Analytics Operating Framework will provide the foundation for South African Tourism to champion the digital outlook for South African Tourism and the tourism industry. For each year of implementation, an annua Roadmap will be developed and implemented.
Source of Data	▪ Integrated Digital and Analytics Operating Framework. ▪ Year 1 Roadmap of the Integrated Digital and Analytics Operating Framework. ▪ Year 2 Roadmap of the Integrated Digital and Analytics Operating Framework. ▪ Quarterly DigiTech Reports reflecting progress against the approved Year 2 Roadmap of the Integrated Digital and Analytics Operating Framework.
Method of Calculation / Assessment	Assessment of quarterly progress against the Year 2 Roadmap of the approved Integrated Digital and Analytics Operating Framework.
Means of Verification	Verify that the: ▪ Integrated Digital and Analytics Operating Framework was approved in line with South African Tourism's Delegation of Authority in FY2022/23. ▪ Year 2 Roadmap of the Integrated Digital and Analytics Operating Framework was approved in line with South African Tourism's Delegation of Authority in FY2022/23. ▪ Quarterly DigiTech Reports reflect progress against the approved Year 2 Roadmap of the Integrated Digital and Analytics Operating

	Framework and were approved by the Chief Digital Transformation Officer within five days after the end of the quarter.
Assumptions	▪ Support by business units for implementation of the Year 1 and Year 2 roadmaps of the approved Integrated Digital and Analytics Operating Framework. ▪ Sufficient budget allocation.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per defined targets is desirable.
Indicator Responsibility	Divisional Head: Chief Digital Transformation Officer.

Indicator Title 2.7.1	Number of tourism information tracking surveys completed
Definition	Tourism information tracking surveys provide quality tourism information for planning and organisational decision-making purposes. The five tourism information tracking surveys that will be undertaken by SA Tourism are: ▪ International leisure brand tracker, which is undertaken through three data collection phases, resulting in three fieldwork reports. ▪ Departure Survey, which is undertaken through four data collection phases, resulting in four fieldwork reports. ▪ Domestic Tourism Survey, which is undertaken through four data collection phases, resulting in four fieldwork reports. ▪ Business Events Brand Equity Tracker, which is undertaken through three data collection phases, resulting in three fieldwork reports. ▪ Domestic Leisure Brand Tracker, which is undertaken through 2 data collection phases, resulting in 2 fieldwork reports.
Source of Data	▪ International leisure brand tracker: three fieldwork reports. ▪ Departure Survey: 4 fieldwork reports. ▪ Domestic Tourism Survey: 4 fieldwork reports. ▪ Business Events Brand Equity Tracker: 3 fieldwork reports. ▪ Domestic Leisure Brand Tracker: 2 fieldwork reports.

Method of Calculation / Assessment	Simple count of the number of quarterly tourism information surveys conducted.
Means of Verification	Verify performance as follows: ▪ International Leisure Brand Tracker: 1 fieldwork report delivered in quarters 2, 3, and 4, within five days after the end of the relevant quarter. ▪ Departure Survey: 1 fieldwork report delivered in each quarter, within five days after the end of the quarter. ▪ Domestic Tourism Survey: 1 fieldwork report delivered in each quarter, within five days after the end of the quarter. ▪ Business Events Brand Equity Survey: 1 fieldwork report delivered in quarters 2, 3, and 4, within five days after the end of the relevant quarter. ▪ Domestic Leisure Brand Tracker: 1 fieldwork report delivered in quarters 2 and 4, within five days after the end of the relevant quarter.
Assumptions	No lockdowns or other impediments to data collection.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly
Desired Performance	Implementation of targets as planned is desirable.
Indicator Responsibility	Divisional Head: Chief Strategy Officer.

Indicator Title 2.8.1	Number of quarterly trend analysis reports
Definition	Published quarterly trends analysis report (either in PowerPoint, Word, or PDF format). The report must include key trends which relate to tourism or consumer trends.
Source of Data	Quarterly Trends Report.
Method of Calculation / Assessment	Number of quarterly trends analysis reports published.
Means of Verification	Verify that the: ▪ Quarterly trends analysis reports were published through either a screen grab - as proof of publication; OR, back-end proof of loading

	with a time and date stamp of when the quarterly trends analysis reports were published.
	▪ The quarterly trends analysis report was approved by the Chief Strategy Officer.
	▪ The Quarterly Analytics and Insights Reports, indicate the progress of the quarterly trends report, and were approved by the Chief Strategy Officer within five days after the end of the quarter.
Assumptions	Not applicable.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly
Desired Performance	Implementation of target as planned is desirable.
Indicator Responsibility	Divisional Head: Chief Strategy Officer.

Indicator Title 2.9.1	Number of thought leadership pieces published
Definition	Thought leadership pieces (focusing on tourism) will be published on South African Tourism's platforms or external platforms and includes any of the following:
	▪ Published article; or
	▪ Infographic; or
	▪ News story; or
	▪ Video; or
	▪ Animation.
Source of Data	Published thought leadership pieces.
Method of Calculation / Assessment	Simple count of the number of published thought leadership pieces.
Means of Verification	Verify that the:
	▪ Thought leadership pieces were published through either a screen grab - as proof of publication; OR, back-end proof of loading with a time and date stamp of when the thought leadership pieces were published.

	▪ The thought leadership pieces were approved by the Chief Strategy Officer.
Assumptions	Not applicable.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly
Desired Performance	Implementation of target as planned is desirable.
Indicator Responsibility	Divisional Head: Chief Strategy Officer.

Indicator Title 2.10.1	Number of tourism statistics and performance reports
Definition	Quarterly tourism statistics and performance reports outlining the state of tourism in South Africa and globally.
Source of Data	Quarterly tourism statistics and performance reports.
Method of Calculation / Assessment	Simple count of the number of tourism statistics and performance reports.
Means of Verification	Verify that the: ▪ Quarterly tourism statistics and performance reports were published through either a screen grab - as proof of publication; OR, back-end proof of loading with a time and date stamp of when the quarterly tourism statistics and performance reports were published. ▪ The quarterly tourism statistics and performance reports were approved by the Chief Strategy Officer.
Assumptions	No delays in fieldwork.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly

Desired Performance	Implementation of targets as planned is desirable.
Indicator Responsibility	Divisional Head: Chief Strategy Officer.

Indicator Title 2.11.1	South African Tourism Corporate Brand Index
Definition	The Corporate Brand Index assesses the level of awareness by stakeholders on SA Tourism's mandate and strategy. The survey also measures the levels of satisfaction with stakeholder engagement initiatives and determines the most pertinent communication channels to enhance coordination and collaboration.
Source of Data	▪ FY2022/23 South African Tourism Corporate Brand Index Survey Report. ▪ Improvement Plan arising from the FY2022/23 South African Tourism Corporate Brand Index Report. ▪ Annual FY2023/24 Stakeholder Engagement Programme. ▪ Quarterly stakeholder engagement programme reports. ▪ FY2023/24 South African Tourism Corporate Brand Index Survey Report.
Method of Calculation / Assessment	▪ Assess whether the Improvement Plan arising from the FY2022/23 South African Tourism Corporate Brand Index Report was developed and approved in line with South African Tourism's Delegation of Authority in Quarter 1. ▪ Assess whether the Annual FY2023/24 Stakeholder Engagement Programme was developed and approved in line with South African Tourism's Delegation of Authority in Quarter 1. ▪ Assessment of progress against the Improvement Plan and Annual FY2023/24 Stakeholder Engagement Programme, detailed in the quarterly stakeholder engagement programme reports, approved by the COO, within five days after the end of each quarter. ▪ Assess if the FY2023/24 South African Tourism Corporate Brand Index Survey was undertaken in Quarter 4 with the report tabled at ExCo in Quarter 4.
Means of Verification	Verify that: ▪ The FY2022/23 South African Tourism Corporate Brand Index Survey Report was available in March 2023. ▪ The Improvement Plan arising from the FY2022/23 South African Tourism Corporate Brand Index Report was available in Quarter 1. ▪ The Annual FY2023/24 Stakeholder Engagement Programme was approved in line with South African Tourism's Delegation of Authority in Quarter 1.

	▪ Quarterly stakeholder engagement programme reports were approved by the COO within five days after the end of the quarter and were tabled at ExCo. ▪ The FY2023/24 South African Tourism Corporate Brand Index Survey Report was available in March 2024.
Assumptions	▪ Stakeholders will be willing to participate in the survey to determine South African Tourism's Corporate Brand Index. ▪ Adequate resources are available to implement the Annual FY2023/24 Stakeholder Engagement Programme.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Higher than targeted performance is desirable.
Indicator Responsibility	Divisional Head: Chief Operations Officer.

Indicator Title 2.12.1	Rating of SA Tourism in the Best Company to Work for Survey, or equivalent
Definition	The Best Company to Work for Survey, focuses on four of the most fundamental drivers of engagement today - Leadership, Culture, Human Experience, and Talent, or its equivalent, and will determine areas of focus for SA Tourism and organisational aspects that can be improved and celebrate. Once the baseline rating has been determined, an improvement plan will be developed and implemented to improve the organisation's baseline rating.
Source of Data	Report on the FY2023/24 Best Company to Work for Survey, or equivalent, indicating the organisation's baseline rating.
Method of Calculation / Assessment	Assess that the Best Company to Work for Survey, or equivalent, has been undertaken at South African Tourism in Quarter 1 of the FY2023/24, and provides an organisational baseline rating.
Means of Verification	Verify that the report on the FY2023/24 Best Company to Work for Survey, or equivalent, indicates the organisation's baseline rating, and was tabled with ExCo by the end of Quarter 1.
Assumptions	Human Capital Strategy is implemented.

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

Indicator Title 2.13.1	**Global PR and Communications Annual Plan implemented**
Definition	A Global Public Relations (PR) and Communications Plan will be developed and implemented for the FY2023/24. This plan will focus on the promotion of both South African Tourism's offerings and destination South Africa's exceptional tourism offerings.
Source of Data	▪ Annual Global PR and Communications Plan. ▪ Quarterly report detailing progress towards the implementation of the FY2023/24 Annual Global PR and Communications Plan.
Method of Calculation / Assessment	Assess progress towards implementation of the FY2023/24 Annual Global PR and Communications Plan on a quarterly basis.
Means of Verification	Verify that the: ▪ FY2023/24 Annual Global PR and Communications Plan was approved in line with South African Tourism's Delegation of Authority in Quarter 1. ▪ Quarterly reports detail progress towards the implementation of the FY2023/24 Annual Global PR and Communications Plan and were approved by the Chief Operations Officer within five days of the end of each quarter.
Assumptions	▪ There is sufficient budget available. ▪ Working and acceptable tools implemented for performance tracking, e.g., brand management system, data management, media monitoring, and digital asset management. ▪ No restrictions or business interruption from unforeseen events.
Disaggregation of Beneficiaries (where applicable)	Not applicable.

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

3. PROGRAMME 3: LEISURE TOURISM MARKETING

Indicator Title 1.1.1	Global Tourism Brand Campaign implemented
Definition	An annual Global Tourism Brand Campaign specifically targeting the MPIF defined global markets is developed and implemented.
Source of Data	▪ Annual Global Tourism Brand Campaign Plan. ▪ Quarterly report detailing progress in implementing the Global Tourism Brand Campaign Plan.
Method of Calculation / Assessment	Assess progress towards implementation of the FY2023/24 Global Tourism Brand Campaign Plan on a quarterly basis.
Means of Verification	Verify that the: ▪ FY2023/24 Global Tourism Brand Campaign Plan was developed and approved in line with South African Tourism's Delegation of Authority in Quarter 4 of FY22/23. ▪ Quarterly reports detail progress in implementing the Global Tourism Brand Campaign Plan and were approved by the Chief Marketing Officer within five days of the end of each quarter.
Assumptions	▪ There is sufficient budget available. ▪ Working and acceptable tools implemented for performance tracking, e.g., brand management system, data management, media monitoring, and digital asset management. ▪ No restrictions or business interruption from unforeseen events.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Increased tourist arrivals to South Africa, and their spend, contributes to the economic impact of tourism, including downstream economic benefit and job creation in the tourism sector.
Calculation Type	Cumulative (year-end).

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

Indicator Title 1.1.2	Number of localised brand campaigns implemented in support of the Global Tourism Brand Campaign
Definition	SA Tourism develops the global tourism marketing campaign for the destination. This campaign is then rolled out in the identified MPIF international markets: 1. Americas (North and South America). 2. Asia and Australasia (India, China, Japan, Australia). 3. Europe (UK, South Europe, North Europe, Central Europe hubs). 4. Embassy Liaison. Before the campaign is rolled out, it has to be aligned to address the nuances of the specific markets. This is referred to as a localised campaign for a market. The localised marketing campaigns will have 360° integrated elements of the marketing mix, which is a comprehensive plan 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	▪ Campaign Implementation Plan: A clear Campaign Plan with defined milestones per quarter. ▪ Campaign quarterly progress reports: A detailed Campaign Quarterly Progress Report, aligned to the Campaign Plan. ▪ Close-out reports within sixty days after the end of the campaign.
Method of Calculation / Assessment	Simple count of the number of localised brand campaigns implemented in support of the Global Tourism Brand Campaign.
Means of Verification	Verify that the: ▪ Campaign Implementation Plan has defined milestones per quarter and was approved in line with the South African Tourism's Delegation of Authority. ▪ Campaign quarterly progress reports is aligned to the Campaign Plan and were approved by the Chief Marketing Officer, within five days after the end of the quarter. ▪ Close-out reports were approved in line with the South African Tourism Delegation of Authority, within sixty days after the end of the campaign.
Assumptions	▪ Sufficient budget. ▪ Timeous global content that can be effectively localised.

	▪ Working technology and related systems.
	▪ Unrestricted market conditions, e.g., COVID-19-related travel restrictions.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	The international source market campaigns seek to promote increased tourist arrivals to South Africa, including a focus on improving the geographic spread of arrivals and spend across the 9 provinces of the country.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly
Desired Performance	Implementation of targets as planned is desirable.
Indicator Responsibility	Divisional Head: Chief Marketing Officer.

Indicator Title 1.2.1	Number of regional seasonal campaigns implemented
Definition	SA Tourism develops the global tourism marketing campaign for the destination. This campaign is then rolled out in the identified MPIF Africa markets. Before the campaign is rolled out, it has to be aligned to address the nuances of the specific markets. This is referred to as a localised campaign for a market. The localised marketing campaigns will have 360° integrated elements of the marketing mix, which is a comprehensive plan on reaching the target audience from multiple platforms and channels.
Source of Data	▪ An Annual Campaign Implementation Plan with defined milestones per quarter. ▪ Campaign Quarterly Progress Reports. ▪ Close-out reports within sixty days after the end of the campaigns.
Method of Calculation / Assessment	Simple count of the number of regional (Africa) seasonal campaigns implemented.
Means of Verification	Verify that the: ▪ Annual Campaign Implementation Plan has defined milestones per quarter and was approved in line with the South African Tourism's Delegation of Authority. ▪ Quarterly Campaign Progress Reports are aligned to the Campaign Implementation Plan and were approved by the Chief Marketing Officer, within five days after the end of the quarter.

	▪ Close-out reports were approved in line with the South African Tourism's Delegation of Authority, within sixty days after the end of the campaigns.
Assumptions	▪ Sufficient budget. ▪ Timeous global content that can be effectively localised. ▪ Working technology and related systems. ▪ Unrestricted market conditions, e.g., COVID-19-related travel restrictions.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	The Africa source market campaigns seek to promote increased tourist arrivals to South Africa, including a focus on improving the geographic spread of arrivals and spend across the 9 provinces of the country.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly
Desired Performance	Implementation of targets as planned is desirable.
Indicator Responsibility	Divisional Head: Chief Marketing Officer.

Indicator Title 1.3.1	Number of domestic seasonal campaigns implemented
Definition	The development and implementation of localised marketing campaigns, that have 360° integrated elements of the marketing mix.
Source of Data	▪ An Annual Campaign Implementation Plan with defined milestones per quarter. ▪ Campaign Quarterly Progress Reports. ▪ Close-out reports within sixty days after the end of the campaigns.
Method of Calculation / Assessment	Simple count of the number of domestic seasonal campaigns implemented.
Means of Verification	Verify that the: ▪ Annual Campaign Implementation Plan has defined milestones per quarter and was approved in line with the South African Tourism's Delegation of Authority. ▪ Quarterly Campaign Progress Reports are aligned to the Campaign Implementation Plan and were approved by the Chief Marketing Officer, within five days after the end of the quarter.

	▪ Close-out reports were approved in line with the South African Tourism's Delegation of Authority, within sixty days after the end of the campaigns.
Assumptions	▪ Sufficient budget. ▪ Timeous global content that can be effectively localised. ▪ Working technology and related systems. ▪ Unrestricted market conditions, e.g., COVID-19-related travel restrictions.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Increased domestic tourism, and the spend, contributes to the economic impact of tourism, including downstream economic benefit and job creation in the tourism sector.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation of targets as planned is desirable.
Indicator Responsibility	Divisional Head: Chief Marketing Officer.

Indicator Title 1.4.1	Number of distribution channel initiatives implemented in-market
Definition	Distribution channels are traditional and non-traditional trade, i.e., media, influencers, corporates, stakeholders. Distribution channel initiatives are platforms that allow for engagement and communication with distribution channels to build destination awareness, interest and/or conversion.
Source of Data	▪ Annual Distribution Channel Initiatives Implementation Plan. ▪ A Quarterly Implementation Plan Progress Report. ▪ Close-out Report produced in Quarter 4.
Method of Calculation / Assessment	Simple count of the number of distribution channel initiatives implemented in-market.
Means of Verification	Verify that the: ▪ Annual Distribution Channel Initiatives Implementation Plan, with clear milestones per quarter, and was approved in line with the South African Tourism Delegation of Authority. ▪ A Quarterly Implementation Plan Progress Report is aligned to the Annual Distribution Channel Initiatives Implementation Plan and is submitted five days after the end of each quarter, approved by the Executive Manager.

	• Close-out Report was produced in Quarter 4 outlining ROI, learnings, and future recommendations.
Assumptions	• Sufficient budget is allocated. • The hosting policy and hosting platform that are market relevant. • Execution Lead Hosting Policy and hosting implementation. • Working technology and related systems. • B2B Portal on SA.net – Ability to connect SMMEs and trade and consumers. • A functioning sa.net website – with SME products and experiences.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation of targets as planned is desirable.
Indicator Responsibility	Divisional Head: Chief Marketing Officer.

Indicator Title 1.5.1	Global Trade Programme implemented
Definition	The Global Trade Programme is critical to stimulate demand in our markets; we must grow trips from and within the country. South Africa needs to be sold effectively by both trade and channel to contribute to economic growth and support the Tourism Sector Recovery Plan.
Source of Data	• Reviewed framework for the Global Trade Reimagined Programme. • Global Trade Reimagined Programme Roadmap. • Quarterly reports detailing progress against the Global Trade Reimagined Programme Roadmap in quarters 2, 3, and 4.
Method of Calculation / Assessment	• Assess progress towards the reviewed framework for the Global Trade Reimagined Programme. • Assess performance against the Global Trade Reimagined Programme Roadmap in quarters 2, 3, and 4.
Means of Verification	Verify that the: • Reviewed framework for the Global Trade Reimagined Programme was approved in line with the SA Tourism's Delegation of Authority in Quarter 1.

	- Global Trade Reimagined Programme Roadmap was approved in line with the SA Tourism's Delegation of Authority in Quarter 1. - Quarterly reports detail progress against the Global Trade Reimagined Programme Roadmap and were approved by the Chief Marketing Officer within five days of the end of quarters 2, 3, and 4.
Assumptions	- Sufficient budget. - Working technology and related systems.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation of targets as planned is desirable.
Indicator Responsibility	Divisional Head: Chief Marketing Officer.

Indicator Title 1.6.1	Annual Global Advocacy Programme implemented
Definition	The Global Advocacy Programme provides collective, active, and concerted support for the positioning of South Africa, particularly to drive a positive narrative on the country, in order to address barrier issues and thereby contribute towards inspiring visitors to book to come to visit South Africa. The Global Advocacy Programme, as conceptualised in FY2021/22, will be further developed and then implemented in stages during FY2022/23 and the outer years of the MTEF.
Source of Data	- Annual Global Advocacy Programme Plan. - Quarterly reports detailing progress in implementing the Annual Global Advocacy Programme Plan, in quarters 2, 3, and 4.
Method of Calculation / Assessment	Assess progress towards implementation of the FY2023/24 Global Advocacy Programme Plan on a quarterly basis in quarters 2, 3, and 4.
Means of Verification	Verify that the: - FY2023/24 Global Advocacy Programme Plan was approved in line with SA Tourism's Delegation of Authority, in Quarter 1. - Quarterly reports detail progress towards the implementation of the FY2023/24 plan and were approved by the Chief Operations Officer tabled within five days of the end of each quarter.
Assumptions	Adequate resources are available to implement the Annual Programme.

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

Indicator Title 1.7.1	**Number of quarterly tourism economic impact communications activities**
Definition	A communications activity will be undertaken each quarter to communicate to the tourism sector and various stakeholders what the tourism sector performance has been for the quarter and the related economic impact. The communications activity to tell the quarterly economic impact story of tourism could be in the form of a round table, or a press release, or a media interview, or one on one media engagements.
Source of Data	Quarterly Economic Impact Communications Activity Plan to tell the economic impact story of tourism.
Method of Calculation / Assessment	Simple count of the number of quarterly tourism economic impact communication activities.
Means of Verification	Verify that the: ▪ Quarterly Economic Impact Communications Activity Plan was approved in line with South African Tourism's Delegation of Authority. ▪ Quarterly reports on quarterly economic impact communications activity outline progress against the plan and were approved by the Chief Marketing Officer within five days of the end of the quarter.
Assumptions	Adequate resources are available to implement the quarterly communications activity.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).

Reporting Cycle	Quarterly.
Desired Performance	Higher than targeted performance is desirable.
Indicator Responsibility	Divisional Head: Chief Marketing Officer.

4. PROGRAMME 4: BUSINESS EVENTS

Indicator Title 1.8.1	Number of B2B brand campaigns implemented
Definition	The development and implementation of a Domestic and a Global Business to Business (B2B) Marketing Campaign focused on targeted economic sectors.
Source of Data	• Campaign Plan for a Domestic and Global Business to Business (B2B) Marketing Campaign, with predetermined goals that are aligned to the South African Tourism FY2023/24 Annual Performance Plan and annual and divisional operational plans. The campaign plan will have predetermined KPIs linked to the campaign goals, indicating the measurement to be used for each KPI. • A detailed Campaign Close-out Report, addressing the goals, KPIs and its measurements, as well as insights and learnings of the campaign.
Method of Calculation / Assessment	Simple count of the number of campaigns delivered.
Means of Verification	Verify that the: • Campaign Plan for Domestic and Global Business to Business (B2B) Marketing Campaign was approved in line with the SA Tourism Delegation of Authority. • Campaign Close-out Report, addressing the goals, KPIs and its measurements, as well as insights and learnings of the campaign, was signed by the Chief Convention Bureau Officer within five days after the end of the quarter.
Assumptions	• Sufficient budget. • Timeous and relevant content that can be effectively utilised. • Working marketing technologies to communicate content to business events audiences.
Disaggregation of Beneficiaries (where applicable)	Not applicable.

Spatial Transformation (where applicable)	Increased tourist arrivals to South Africa, and their spend, contributes to the economic impact of tourism, including downstream economic benefit and job creation in the tourism sector.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per defined targets is desirable.
Indicator Responsibility	Divisional Head: Chief Convention Bureau Officer.

Indicator Title 1.9.1	**Number of bid submissions**
Definition	The number of bid submissions will be tracked with regards to bid submissions for international and regional business events (meetings, incentives, conventions, and exhibitions) that will be supported by the South Africa National Convention Bureau. Each bid submission needs to meet the minimum requirements of the Revised Bid Support Programme.
Source of Data	List of the bids supported on a quarterly basis.
Method of Calculation / Assessment	Simple count of the number of bids submitted.
Means of Verification	Verify that bid support letters were signed by the Chief Convention Bureau Officer.
Assumptions	▪ Each bid submission starts with a lead sourcing process to identify and qualify a potential piece of business. The lead sourcing process can take up to two to three years to convert a lead into a bid submission. ▪ Each bid submission requires a coordinated effort, including various value chain stakeholders (association, venue, professional conference organiser (PCO), etc.) to develop a bid strategy and bid document that responds to the hosting requirements of the event owner(s).
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Higher than targeted performance is desirable.
Indicator Responsibility	Divisional Head: Chief Convention Bureau Officer.

Indicator Title 1.9.2	Number of business events hosted in Villages, Townships and Small Dorpies (VTSDs)
Definition	The number of National Association business events supported within South Africa and hosted in villages, townships, and small dorpies (VTSDs).
Source of Data	List of National Association business events supported on a quarterly basis.
Method of Calculation / Assessment	Simple count of the number of National Association business events hosted in VTSDs.
Means of Verification	Verify that signed memorandum of agreements (MOAs) between SA Tourism and the host organisation were in place for each business event hosted in a VTSD.
Assumptions	The ability of National Associations to participate in the programme and host their business events in villages, townships, and small dorpies.
Disaggregation of Beneficiaries (where applicable)	The economic impact of hosting these meetings and conferences in VTSDs does not benefit a particular designated group of people but the community as a whole.
Spatial Transformation (where applicable)	This indicator seeks to spread meetings, conferences and workshops previously hosted in Metropolitan areas to VTSDs across South Africa.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Higher than targeted performance is desirable.
Indicator Responsibility	Divisional Head: Chief Convention Bureau Officer.

Indicator Title 1.9.3	Number of business events bidding impact reports
Definition	This report is a data and insights report on the SANCB's bidding performance.
Source of Data	Approved business events bidding impact reports.
Method of Calculation / Assessment	Simple count of the number of business events bidding impact reports published.
Means of Verification	Verify that the business events bidding impact reports were approved in line with the SA Tourism Delegation of Authority.
Assumptions	Quality assurance assistance from the Analytics and Insights business unit.

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

Indicator Title 1.10.1	Africa's Travel Indaba 2023 hosted
Definition	Hosting of Africa's Travel Indaba 2023 successfully, as a strategic business event, in order to benefit the tourism industry.
Source of Data	▪ Africa's Travel Indaba 2023 Project Plan. ▪ Post-show Report for Africa's Travel Indaba 2023. ▪ Online Diary System for the event.
Method of Calculation / Assessment	Simple count of the number of events.
Means of Verification	Verify that the: ▪ Africa's Travel Indaba 2023 Project Plan was approved in line with the SA Tourism's Delegation of Authority. ▪ Post-show Report for Africa's Travel Indaba 2023 was approved by the Chief Convention Bureau Officer seven months after the end of the event.
Assumptions	Africa's Travel Indaba 2023 will be hosted and will not be cancelled.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Non-cumulative.
Reporting Cycle	Annually.
Desired Performance	Implementation as per defined target is desirable.

Indicator Responsibility	Divisional Head: Chief Convention Bureau Officer.

Indicator Title 1.10.2	Meetings Africa hosted
Definition	Hosting of Meetings Africa 2024 successfully, as a strategic business event, in order to benefit the tourism industry.
Source of Data	▪ Meetings Africa 2024 Project Plan. ▪ Post-show Report for Meetings Africa 2024. ▪ Online Diary System for the event.
Method of Calculation / Assessment	Simple count of the number of events.
Means of Verification	Verify that the: ▪ Meetings Africa 2024 Project Plan was approved in line with the SA Tourism's Delegation of Authority. ▪ Post-show Report for Meetings Africa 2024 was approved by the Chief Convention Bureau Officer, within seven months after the end of the event.
Assumptions	Meetings Africa 2024 will be hosted and will not be cancelled.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Non-cumulative.
Reporting Cycle	Annually.
Desired Performance	Implementation as per defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Convention Bureau Officer.

Indicator Title 1.10.3	Number of international strategic platforms participated in
Definition	Participating at international strategic platforms, as identified by the organisation, in order to benefit the tourism industry.
Source of Data	▪ Project Plan per strategic platform. ▪ Post-show Report

Method of Calculation / Assessment	Calculation of the number of strategic platforms that South African Tourism participated in.
Means of Verification	Verify that the: • Project Plan per strategic platform was approved in line with the SA Tourism Delegation of Authority. • Post-show Report was approved by the Chief Convention Bureau Officer within two months after the end of the strategic platform participation.
Assumptions	International strategic platforms will be hosted and will not be cancelled.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Non-cumulative.
Reporting Cycle	Annually.
Desired Performance	Implementation as per defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Convention Bureau Officer.

5. PROGRAMME 5: TOURIST EXPERIENCE

Indicator Title 1.11.1	Number of graded establishments
Definition	The number of tourism establishments that join the Tourism Grading Council of South Africa (TGCSA) Star Grading Membership Scheme and are graded.
Source of Data	Total Quality in Tourism (TQiT) System.
Method of Calculation / Assessment	Simple count of the number of valid members on the TQiT System.
Means of Verification	Verify that quarterly TQiT System reports were generated from the TQiT System within five days after the end of each quarter.
Assumptions	• Establishments find value in grading. • The economy does not lead to establishments shutting down.
Disaggregation of Beneficiaries (where applicable)	Not applicable.

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

Indicator Title 1.11.2	Reviewed grading model and TGCSA Value Proposition implemented
Definition	Review of the grading system and the Quality Assurance Framework and approach, and to broaden the opportunities for the inclusion of emerging tourist products, tourist experiences, and accommodation. Implementation of the approved Tourism Grading Council of South Africa (TGCSA) Value Proposition and Business Model.
Source of Data	▪ FY2023/24 milestones in the grading model and TGCSA Value Proposition Roadmap. ▪ Quarterly Tourist Experience Report detailing progress against the grading model and TGCSA Value Proposition Roadmap.
Method of Calculation / Assessment	Assess progress against the grading model and TGCSA Value Proposition Roadmap on a quarterly basis.
Means of Verification	Verify that the: ▪ FY2023/24 milestones in the grading model and TGCSA Value Proposition Roadmap were developed in FY2022/23. ▪ Quarterly Tourist Experience Reports detail progress against the grading model and TGCSA Value Proposition Roadmap and were approved by the Chief Quality Assurance Officer within five days after the end of the quarter.
Assumptions	Resources to meet operational needs to deliver the value proposition/mandate: ▪ Budget. ▪ Functional TQiT System and data support. ▪ Human resources and supporting operational structure. ▪ Suppliers (grading assessors).
Disaggregation of Beneficiaries (where applicable)	The reviewed Tourism Grading Council of South Africa (TGCSA) Value Proposition and Business Model seeks to promote: ▪ Emerging women owned tourist products and experiences. ▪ Emerging youth owned tourist products and experiences.

	▪ Emerging persons with disabilities owned tourist products and experiences.
Spatial Transformation (where applicable)	The reviewed Tourism Grading Council of South Africa (TGCSA) Value Proposition and Business Model seeks to promote the inclusion of emerging tourist products and experiences outside of the traditional major centres, including in rural areas across the 9 provinces.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per defined targets is desirable.
Indicator Responsibility	Divisional Head: Chief Quality Assurance Officer.

Indicator Title 1.12.1	Product proposition implemented
Definition	South African Tourism will identify tourism products (including but not limited to tourist establishments, tourist attractions and tourist experiences) in order to match them to the brand of South Africa being an exceptional tourist destination with a variety of authentic and diverse tourism offerings that meets the demands of the tourist.
Source of Data	▪ Approved Product Proposition. ▪ Approved Product Proposition Roadmap. ▪ Quarterly Tourist Experience Report detailing progress against the project, in quarters 3 and 4.
Method of Calculation / Assessment	▪ Assess that the Product Proposition was developed in Quarter 1. ▪ Assess that the Product Proposition Roadmap was developed in Quarter 2. ▪ Assess progress against the Product Proposition Roadmap on a quarterly basis in quarters 3 and 4.
Means of Verification	Verify that the: ▪ Product Proposition was approved in Quarter 1. ▪ Product Proposition Roadmap was approved in Quarter 2. ▪ Quarterly Tourist Experience Reports detail progress against the Product Proposition Roadmap and were approved by the Chief Quality Assurance Officer within five days after the end of each quarter, in quarters 3 and 4.
Assumptions	▪ Sufficient budget to support Product Proposition programmes. ▪ Accurate information on the tourism markets and the products that each market requires.

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

Indicator Title 1.13.1	Three-Year Tourism Value Chain Strategy and Roadmap
Definition	The Three-Year Tourism Value Chain Strategy (2024-2027) will be developed. This strategy will focus on improving the quality of the visitor's experiences across the different touchpoints of the tourism value chain. The strategy will be supported by a roadmap that will outline deliverables per year for each of the three years.
Source of Data	▪ Draft Three-Year Tourism Value Chain Strategy (2024-2027) in quarter 1. ▪ Approved Three-Year Tourism Value Chain Strategy (2024-2027) in quarter 2. ▪ Three-Year Tourism Value Chain Strategy Roadmap in quarter 4. ▪ Quarterly Tourist Experience Reports.
Method of Calculation / Assessment	Assess progress against the project and the implementation roadmap on a quarterly basis.
Means of Verification	Verify that the: ▪ Three-Year Tourism Value Chain Strategy (2024-2027) was drafted in Quarter 1. ▪ Three-Year Tourism Value Chain Strategy (2024-2027) was approved in line with SA Tourism's Delegation of Authority in Quarter 2. ▪ The Roadmap was developed in Quarter 4. ▪ Quarterly Tourist Experience Reports detail progress against the project and were approved by the Chief Quality Assurance Officer within five days after the end of each quarter.
Assumptions	▪ Sufficient budget to deliver all areas ▪ Tourism value chain touchpoints are vast; thus, SA Tourism may only be able to influence those that are within its scope of control.

	■ Successful procurement of services required to deliver the Three-Year Strategy. ■ MOUs and partnerships with key strategic partners.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per defined target is desirable.
Indicator Responsibility	Divisional Head: Chief Quality Assurance Officer.

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

ANNEXURES TO THE ANNUAL PERFORMANCE PLAN

ANNEXURE A: AMENDMENTS TO THE STRATEGIC PLAN

Coinciding with the Midterm Assessment of the revised Five-Year Strategic Plan 2020-2025, the process to develop this FY2023/24 Annual Performance Plan began with reviewing and confirming the amendments made to the approved Five-Year Strategic Plan 2020-2025, included as Annexure A to the FY2021/22 Annual Performance Plan.

The review confirmed that:

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

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

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

To best align the planning framework with the discussions with South African Tourism stakeholders in the public and private sectors in August 2022, 4 sub-outcomes are introduced. While the 13 outcome indicators are retained, their sequence is changed to align with the 4 sub-outcomes.

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

The amendments are as follows:

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

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

OUTCOME	SUB-OUTCOME INTRODUCED	AMENDMENT TO OUTCOME FIVE-YEAR TARGETS			NOTE ON AMENDMENT
		Outcome indicator	Baseline (2019/20)	Five-year target (By March 2025)	
		Rand value of international tourist spend	R90.7 billion	R86.7 billion	Target adjusted downwards from R90.7 billion
		Number of domestic holiday trips	7.1 million	10.8 million	Target adjusted upwards from 7.1 million
		Rand value of domestic holiday direct spend	R17.3 billion	R33.5 billion	Target adjusted upwards from R17.3 billion
		Number of international business events hosted	230	111 (cumulative 2020/21-2024/25)	No change to target
	2. Demand fulfilment	Seasonality of tourist arrivals	1.3%	1.0%	Target adjusted downwards from 1.3%
		Geographic spread of international tourist arrivals	20%	13.9%	Target adjusted downwards from 20%
		Geographic spread of domestic tourist arrivals	8%	8%	No change to target
		Net Promoter Score	91%	-	Target removed from Five-Year Strategic Plan and moved to Annual Operational Plan
		Number of SMME businesses supported	182	1 096 (cumulative 2020/21-2024/25)	No change to target

OUTCOME	SUB-OUTCOME INTRODUCED	AMENDMENT TO OUTCOME FIVE-YEAR TARGETS			NOTE ON AMENDMENT
		Outcome indicator	Baseline (2019/20)	Five-year target (By March 2025)	
				(Through both business events platforms and Visitor Experience events and hosting itineraries)	
2. Achieve good corporate and cooperative governance	1. Relevant tourism intelligence and digital ecosystem	-	-	-	-
	2. Improved corporate reputation	South African Tourism Corporate Brand Index	New indicator	74.24 South African Tourism Corporate Brand Index	Five-year target introduced, based on findings of baseline study in 2021/22
		External audit outcome	Unqualified audit outcome	Unqualified audit outcome maintained	No change to target

ANNEXURE B: CONDITIONAL GRANTS

Not applicable to South African Tourism.

ANNEXURE C: CONSOLIDATED INDICATORS

Not applicable to South African Tourism.

ANNEXURE D: DISTRICT DEVELOPMENT MODEL

Not applicable to South African Tourism.