SOUTH AFRICAN TOURISM

ANNUAL PERFORMANCE PLAN

FOR

FY2022/23

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Honourable Lindiwe Sisulu, MP

Minister of Tourism

Unknowingly, the detection of the first Coronavirus case in our country, on Thursday 5th March 2020, turned out to be a seismic event in the life of our nation. Everything changed that day. For two years, since the outbreak of the COVID-19 pandemic, we retreated tactically amidst global uncertainty, travel restrictions and lockdowns.

We are only recently starting to emerge from the COVID-19 pandemic, characterised by its catastrophic effects on the global business and leisure tourism sector and the resultant increase in our unemployment numbers. The year 2020 marked the worst year on record for the tourism sector, with a 73% year-on-year decrease in international tourist arrivals.

As a nation, we have learned the true value of the tourism sector. The drastic decrease in the number of tourists and business delegates making their way to our country due to COVID-19 has reinforced the importance of our sector to the economy. Now more than ever, as a nation, we have a shared responsibility to look after our citizens and visitors alike.

It is now time for our country to reclaim our place as an attractive tourism and business events destination. I am encouraged by estimates from the United Nations World Tourism Organisation (UNWTO) that global tourism experienced a 4% upturn in 2021, compared to 2020.

As South African Tourism, we have spent a considerable and worthwhile amount of time re-imagining and planning for the future, which is based on the Tourism Sector Recovery Plan, gazetted in 2021. As we contemplated, imagined and conceputalised what tourism would look like in a world where COVID-19 has morphed the world from despair-inducing pandemic mode into being something that is manageable, we know that as a destination we must offer more than a transient high. Our hard work has led to the launch of our Global Brand Campaign which we know will convey the message of Destination South Africa in a manner that is bold, loud, and unyielding for all the world to hear. After two years of merely surviving and staying alive with restricted movements, South Africa is showing the world how to Live Again!

The unscientific travel bans and unilateral restrictions imposed on Southern African countries like ours, over the last few months, by countries of the global north, exerted an objectively measurable price on

our countries' economies. With an unshakable conviction we are determined to climb back to the peaks we have previously summited with tourism in our country. Our goal is simple, albeit daunting under the circumstances, to restore the tourism sector to its pre-COVID-19 pinnacle and take it even higher.

As the world gradually relaxes travel restrictions and lifts travel bans, South African Tourism together with the wider tourism industry, has also launched the Global Advocacy Programme, an initiative that has the clear strategic intent of removing barriers and creating a positive narrative about South Africa. The next fiscal year will see us intensifying our efforts in this regard. This is our commitment and action in removing barrier issues that prevent domestic tourists from exploring their own country and of course those that discourage international tourists from choosing South Africa as a premier destination.

Equally, we have a collective responsibility to reignite the African continent's tourism growth and economy. Opening trade corridors across the continent must also open pathways for intra-African tourism to thrive. In this regard, we continue to build an events pipeline that continues to demonstrate that South Africa is the only premier destination for business tourism focusing on trade, investment and tourism. Our National Convention Bureau will continue to identify and submit bids to host international meetings, conferences and exhibitions in an effort to grow our business tourism market. I am particularly pleased that going into the next fiscal year, our strategic shows such as Meetings Africa and Africa's Travel Indaba are back in physical format. This is a great sign of a tourism sector that is well on its way to recovery.

We are seeing more signs of recovery and confidence in our markets as airline partners have once again resumed routes to South Africa. Air Access is important for South Africa, as we to look to recover post-COVID. We know that airlift is a major enabling factor, so seeing our airline partners resuming travel to South Africa means that we have the means to seamlessly connect people to our destination. The plans outlined in this Annual Performance Plan are inspired by such significant developments.

I would like to express my sincere gratitude to the South African Tourism Board for their diligent leadership and oversight role. Equally, the Executive Management team and greater South African Tourism team for their unwavering commitment. No doubt, the last year or two have not been easy. I would also like to express my appreciation to the greater tourism industry for the continued partnership and collaboration as we optimistically cast our eyes towards the full recovery of the tourism sector.

LN Sisulu, MP
Minister of Tourism

ACCOUNTING AUTHORITY STATEMENT

Advocate Mojanku Gumbi
Interim Chairperson of the Board

The 2021/22 financial year continued to be a challenging one for tourism globally, as the COVID-19 pandemic persisted. Our country went through various adjusted lockdown periods to mitigate against the further spread of the virus while sustaining economic activity as much as possible. At South African Tourism we started the year 2021 with intensified hope, as we continued the implementation of our Tourism Sector Recovery Plan (TSRP). We witnessed signs of recovery and confidence in our markets, as key source markets gradually opened up to South Africa. Airline partners also resumed routes to South Africa. However, these gains were reversed in the latter part of the year, when the world reintroduced restrictions, due to fears arising from the Omicron variant, the discovery of which was first announced by a South African scientist, although it turned out to be present in other parts of the world. Global airlines cancelled flights from various parts of the world to our country.

Although our borders remained open to visitors, South Africa welcomed only 1,7 million arrivals between January and October 2021, as opposed to 2,5 million in 2020 during the same period. Of these arrivals, 1,5 million (85%) were from the Continent. Travel to South Africa from the Africa land markets was the biggest source of arrivals in 2021. A total of 48,6 million domestic trips were taken in South Africa between January and September 2021. This is a decline of 40,5% compared to the same period in 2020. The recovery of the South Africa tourism sector recovers will have a positive impact on economic recovery overall.

While the COVID-19 pandemic remains volatile in all regions across the world, it is difficult to predict with any certainty, the possible developments in the global tourism landscape. We remain focused on a data and insights-led approach to inform our marketing initiatives. There is no doubt that there is a need to redesign our tourism offering as the sector requires significant work to regain pre-COVID-19 momentum. Government, working in partnership with the private sector, will continue to strengthen the enabling environment to welcome domestic, regional, and international travellers.

South African Tourism continues with its two-fold strategy. Firstly, to continue leading in the recovery of the tourism sector and reasserting South Africa as a preferred leisure and business events destination; and secondly, to orient for the future of tourism and an environment of rapid change. From a leisure tourism perspective, it is important that the South Africa destination brand be revitalised to be more appealing, so as to attract travellers and to deliver on a significantly increased number of tourist arrivals by 2030.

Tourism Decision Metrics (TDM), the forecasting tool developed by Oxford Economics and used by South African Tourism, previously estimated that South Africa would attract 16.5 million arrivals by 2030, or 0.74% of the global market share, if the status quo remains the same. This was prior to the COVID-19 pandemic, which has significantly affected this projection. The revised post-COVID-19 projections now stand at 14.8 million arrivals by 2030. A new growth approach must, therefore, be employed to achieve any additional tourist arrivals beyond those reflected by the projection. Thus, South African Tourism will, during FY2022/23, enhance its efforts to stimulate domestic, regional and international demand.

The South African National Convention Bureau (SANCB) will actively seek to develop leads for future business events to ensure that South Africa develops and maintains a bid pipeline for continued growth of the event sector. 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 be truly competitive on the international stage, is the enhanced focus on business development support, to maximise South Africa's chances of winning the rights to host business events.

As we cast our sights to the future, we continue our efforts to promote domestic tourism and to reignite demand from the African continent and the rest of key international source markets. Addressing existing travel barriers is critical for sector recovery and in this regard we will continue to work with our partners in the public and private sectors to remove such barriers. We know that visitors and tourists feel safer when they are vaccinated and when the population of their desired travel destination is vaccinated. The progress on vaccination of people globally has brought a glimmer of hope, not only for South Africa, but for the global tourism industry. Though the demand for international travel remains weak, the roll out of vaccinations has resulted in a gradual recovery as more and more tourists are willing to travel. Going forward, SA Tourism will thus increase its communication around South Africa's progress on vaccination and its impact on our tourism offering.

SA Tourism is confident that it will grow from strength to strength in the new financial year. The Board affirms its commitment to good governance and strategic oversight and leadership of SA Tourism. We appreciate the support and guidance of the Portfolio Committee and the Minister of Tourism in leading tourism sector recovery. The SA Tourism Board fully endorses the FY22/23 Annual Performance Plan as the guiding document for the work of the entity in the new financial year.

Advocate Mojanku Gumbi

Interim Chairperson of the Board

South African Tourism

CHIEF EXECUTIVE OFFICER STATEMENT

Mr. Themba Khumalo

Acting Chief Executive Officer

The global tourism sector continues to be hard hit by the COVID-19 pandemic and, unfortunately, the sector is likely to remain constrained for the foreseeable future. It is, however, encouraging that in the third quarter of 2021, global tourism saw an upturn though recovery remained fragile. According to the UNWTO World Tourism Barometer, international tourist arrivals (overnight visitors) increased by 58% in the July to September 2021 period, compared to the same period of 2020. However, they remain 64% below 2019 levels.

Given the uncertainly and non-predictability of the COVID-19 pandemic, South African Tourism needs to continually review and re-evaluate its priority focus areas, for what is undoubtedly another challenging year ahead. With this in mind, the FY22/23 Annual Performance Plan was developed following an analysis of various global developments and how the world has reacted to the effects of the COVID-19 pandemic. It of course acknowledges the unpredictability of the pandemic, especially with the regular emergence of new variants across the world.

This Annual Performance Plan clearly outlines how we will continue our approach to the recovery of the sector. In 2020, in partnership with the greater tourism sector, South African Tourism began to develop the Tourism Sector Recovery Plan (TSRP) to prepare for the post-COVID-19 era. The plan was approved by Cabinet and launched by the Minister of Tourism in April 2021. In this next fiscal year, we will continue in the spirit of a coordinated response in collaboration with the South African tourism industry as we, together, look to attract more leisure tourists and business events delegates to our shores.

We have always maintained that following the COVID-19 outbreak, domestic travel was likely to recover first, with travellers choosing to first travel locally, before hopping on a flight to a long-haul international destination. This still holds true, meaning that there is now an even greater need to focus on
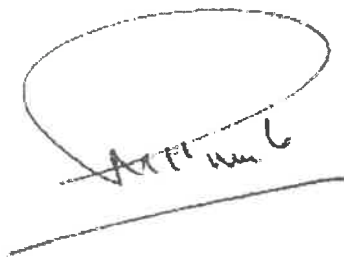
encouraging South Africans to travel around their country. The importance of domestic tourism in supporting tourism recovery in the medium term is also reflected in Oxford Economics' forecasts of spend contributions. These predict that domestic and regional markets will contribute 86% of South African tourism spend in 2021 and 82% in 2022.

Domestic consumers are looking for affordable travel rates, and information on where to go and what to do. South African Tourism has responded accordingly, with targeted deal-driven domestic campaigns, which has yielded positive results. Unfortunately, the COVID-19 pandemic came at a time when South Africa is still having to deal with other barriers, such as a perceived lack of safety and security, lack of value for money, and a low brand appeal. As we proceed into the 2022/23 fiscal year, South African Tourism will intensify its efforts that focus on servicing and growing domestic, regional, and international leisure tourism in order to drive recovery of the tourism sector in the near to medium term.

From a business events perspective, we know that COVID-19 has brought restrictions on the number of people that can gather in one place. However, with the gradual relaxation of lockdown regulations, our business events sector has made significant strides with the resumption of hosting of physical events, albeit in a limited capacity. In the next few months, South African Tourism will, once again, host both Meetings Africa and Africa's Travel Indaba. Meetings Africa will take place from 28th February 2022 to 2nd March 2022, at the Sandton Convention Centre, in Johannesburg, while Africa's Travel Indaba will be hosted from 2nd to 5th May 2022 at the Inkosi Albert Luthuli International Convention Centre in Durban.

As South African Tourism charges forward with its commitment to the recovery of the tourism sector, the return of these shows will promote and market the country's business events hosting capability and showcase destination South Africa's leisure tourism products and experiences. The hosting of these events will contribute to the country's economy, as delegates from various parts of the world will attend these trade shows.

Going forward, this Annual Performance Plan serves as a blueprint on how we intend to reposition South Africa domestically and internationally. South African Tourism still believes that its vision to position South Africa as an exceptional tourist and business events destination is realistic and achievable. The staff and executive team of South African Tourism remain committed to serving destination South Africa to its best abilities.
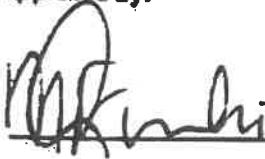
Mr. Themba Khumalo

Acting Chief Executive Officer

OFFICIAL SIGN-OFF

It is hereby certified that this 2022/23 Annual Performance Plan:

1) Was developed by the management team of South African Tourism, under the guidance of the 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 2022/23 financial year.

Amanda Kotze-Nhlapo	**Themba Khumalo**	**Amanda Kotze-Nhlapo**	**Hannelli Slabber**
Chief Convention Bureau Officer	Chief Marketing Officer	Chief Quality Assurance Officer (Acting)	Chief Operations Officer (Acting)
Date: 8/3/2022	Date: 8/3/2022	Date: 06/03/2022	Date: 8/3/2022
Robert Manson	**Nombulelo Guliwe**	**Yoland Kona**	**Themba Khumalo**
Chief Strategy Officer (Acting)	Chief Financial Officer	Head: Strategic Planning, Evaluation & Programme Management	Chief Executive Officer (Acting)
Date: 08/03/2022	Date: 08/03/2022	Date: 05/03/2022	Date: 4/3/2022

Approved by:

Advocate Mojanku Gumbi
Interim Board Chairperson
(Accounting Authority)
Date: 08/03/2022

LN Sisulu, MP
Minister: Tourism
(Executive Authority)
Date: 15/03/2022

ABBREVIATIONS AND ACRONYMS

AOP	Annual Operational Plan
APP	Annual Performance Plan
ARCO	Audit and Risk Committee
ATI	Africa's Travel Indaba
B&M	Branding and Marketing
B2B	Business to Business
B2C	Business to Consumer
BEE	Black Economic Empowerment
BPM	Business Process Management
BQV	Basic Quality Verification
Brand SA	Brand South Africa
BSP	Bid Support Programme
CEO	Chief Executive Officer
COO	Chief Operations Officer
COVID-19	Corona Virus Disease, 2019
DigiTech	Digital Technology
DMO	Destination Marketing Organisation
DRC	Democratic Republic of the Congo
DT	Department of Tourism
DXO	Destination Experience Organisation
E&SD	Enterprise and Supplier Development
EE	Employment Equity
ERRP	Economic Reconstruction and Recovery Plan
ESD	Enterprise Supplier Development
Exco	Executive Management Committee
FY	Financial Year
GDP	Gross Domestic Product
Geo-spread	Geographic Spread
GRC	Governance, Risk and Compliance
ICT	Information and Communication Technology

IT	Information Technology
JMIC	Joint Meeting Industry Council
KPI	Key Performance Indicator
LTA	Local Tourism Authority
MA	Meetings Africa
MICE	Meetings, Incentives, Conferences and Trade Exhibitions
MPIF	Marketing Prioritisation and Investment Framework
MOU	Memorandum of Understanding
MTEF	Medium Term Expenditure Framework
MTSF	Medium Term Strategic Framework
N/A	Not Applicable
NCB	National Conventions Bureau
NDP	National Development Plan
DT	Department of Tourism
NTSS	National Tourism Sector Strategy
PFMA	Public Finance Management Act
PR	Public Relations
PTA	Provincial Tourism Authority
Q	Quarter
QiT	Quality in Tourism
SA	South Africa
SANCB	South African National Convention Bureau
SAT	South African Tourism
SA Tourism	South African Tourism
SCM	Supply Chain Management
SLA	Service Level Agreement
SMART	Specific, Measurable, Achievable, Realistic and Time-bound
SMME	Small, Medium, and Micro Enterprise
SONA	State of the Nation Address
StatsSA	Statistics South Africa
Steerco	Steering Committee
TBCSA	Tourism Business Council of South Africa
TDM	Tourism Decision Metrics

TE	Tourism Execution [Programme]
Tech	Technology
TGCSA	Tourism Grading Council of South Africa
TOMSA	Tourism Marketing South Africa
TQiT	Total Quality in Tourism
TSRP	Tourism Sector Recovery Plan
UAE	United Arab Emirates
UGC	User-generated Content
UK	United Kingdom
UNWTO	United Nations World Tourism Organisation
US/USA	United States of America
USD	United States Dollar
VE	Visitor Experience
VFM	Value for Money
VTSD	Villages, Towns and Small Dorpies
WTTC	World Travel and Tourism Council
ZAR	South African Rands

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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 2020-2025 Strategic Plan, which reflects the following:

1) Constitutional mandate:

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

   Chapter 3, Section 41(1) sets out the relationship and principles underlying cooperation and assigning functions between the various spheres of government. 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 2020-2025 Strategic Plan, which reflects as follows:

1) National Development Plan, Vision 2030 (2012) (NDP) - 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) Medium Term Strategic Framework 2019-2024 (MTSF) - which 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) 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) 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) 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) 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 2020-2025 Strategic Plan in March 2020, certain policy and/or strategy developments have emerged, which have a bearing on the work and operations of South African Tourism and 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) was published in late 2020, as 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
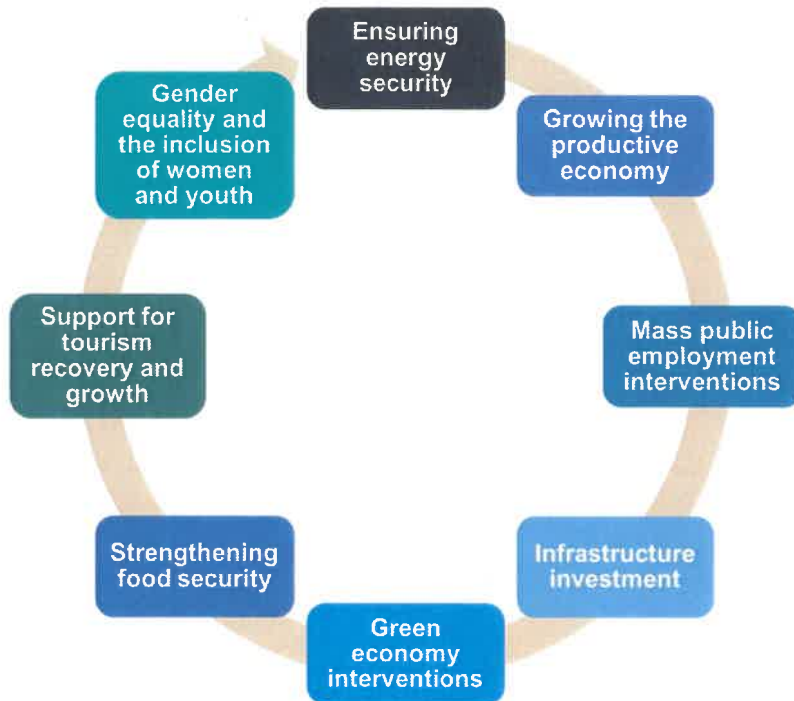
In addition to tourism being identified as one of the priority areas of intervention in the ERRP, the tourism sector has a contribution to make to a number of other priorities of the ERRP.

Source: Economic Reconstruction and Recovery Plan, 2020

2.2. TOURISM SECTOR RECOVERY PLAN, APRIL 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. Industry consultations have surfaced critical business continuity risks across the value chain. The fundamental consideration is the manner in which South Africa will protect its tourism sector and outcompete in a market where every destination is simultaneously chasing recovery.

In response, the Tourism Sector Recovery Plan (TSRP) was developed as a collaborative and iterative effort by key stakeholders in the tourism value chain. 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 or strategic themes. In terms of the plan, a number of strategic interventions are being implemented simultaneously, taking into account the effects of the stop and start cycles that the sector will contend with, at least in the short to medium term, as the virus evolves through possible new waves and strains. The impact of the interventions will cut across the three strategic themes of the TSRP. The TSRP also identifies enablers to support tourism recovery.

Figure 2:   Tourism Sector Recovery Plan

THREE STRATEGIC THEMES / PILLARS	PROTECT AND REJUVENATE SUPPLY	RE-IGNITE DEMAND	STRENTHENING ENABLING CAPABILITY

SEVEN STRATEGIC INTERVENTIONS

1. Implement norms and standards for safe operations across the value chain to enable safe travel and rebuild traveller confidence

4. Support for the Protection of Core Tourism Infrastructure and Assets

2. Stimulate domestic demand through targeted initiatives and campaigns;

5. Execute a global Marketing programme to reignite International Demand

3. Launch an investment and resource mobilisation programme to the support supply

6. Tourism Regional Integration

7. Review the tourism policy to provide enhanced support for sector growth and development

ENABLERS

Form targeted partnerships between industry and government

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

Deployment of the vaccine

Stimulate demand through government consumption

RISKS

Reduced airlift capacity, brand positioning in key source markets and the easing of cross boarder travel restrictions

The country may not be able to achieve its target of population immunity by the end of 2021.

Domestic travel not picking up in the short to medium term, considering the weak state of the economy and diminishing household disposable income.

The stop and start cycles the sector will experience as new waves and variants may occur

Source: Tourism Sector Recovery Plan, April 2021

South African Tourism anchors its planning around giving effect to the TSRP an ERRP, and this Annual Performance Plan clearly outlines how we aim to continue our approach to the recovery of the sector in the 2022/23 fiscal year.

2.3. SOUTH AFRICAN TOURISM MARKETING PRIORITISATION AND INVESTMENT FRAMEWORK

In 2016/17, in partnership with the tourism industry, South African Tourism developed a Marketing Prioritisation and Investment Framework (MPIF) that focused on identifying markets, optimising marketing investments across the identified target markets, and distributing resources to help meet the set objectives. Every three to five years, South African Tourism reviews its 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 Marketing Prioritisation and Investment Framework, 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, return on past investments, and other criteria. The revised MPIF aims to:

In total, 24 markets were identified for prioritisation and were segmented into 16 "growth" and 8 "defend" markets, with an additional set of markets earmarked as "watchlist". The 24 prioritised markets accounted for 92% of all international trips in 2019.

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	Africa Land
Switzerland	Singapore	-	DRC	-
Belgium	Malaysia		Tanzania	
Sweden	UAE			
Ireland				
Denmark				
Portugal				
Austria	New Zealand	Argentina	Ghana	-
Norway			Angola	
Finland			Uganda	
Turkey			Ethiopia	

While South African Tourism had aspired to bolster the econometric growth by 2.5% to meet its 2030 target of 21 million arrivals, the econometric forecasts for South Africa have been revised downwards due to the COVID-19 pandemic. This has led to a widened gap in terms of revised 2030 forecasts that are lower than previous projections; and a reduced timeframe, in that South Africa has a shorter time horizon to move towards 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 Target compared to Post-COVID Target
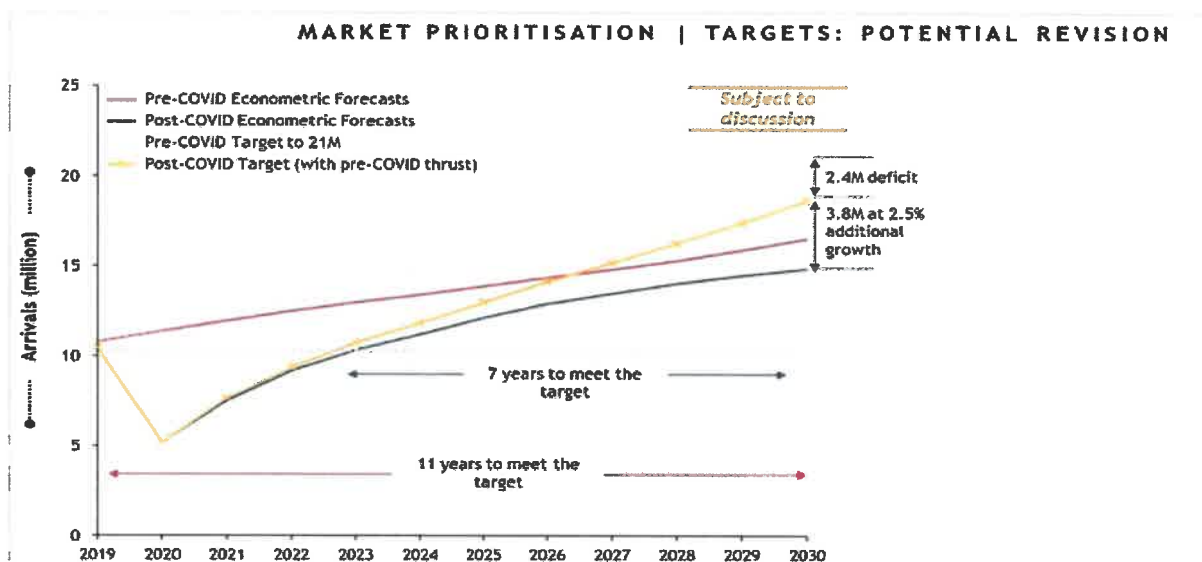
Source: Marketing Prioritisation and Investment Framework as at September 2020

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. These include:

1) **COVID-19 pandemic severity and outlook:** This is detailed by the current total cases of COVID-19, the current growth rate of COVID-19 (measured as a weekly change per 10,000 of the population), and the projected COVID-19 growth rate.

2) **Government Stringency Index:** Source market government policies to control the pandemic, such as border control, travel advisories which include quarantine (isolation), and local movement regulations, which influence the readiness of individuals for travel.

3) **Accessibility:** Level of impact on travel to and from South Africa (land, air, and sea).

4) **Vaccination rollout:** The pace and impact of vaccination, and resultant confidence levels for travel.

3. UPDATES ON RELEVANT COURT RULINGS

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

PART B: OUR STRATEGIC FOCUS

In giving effect to the legislative and policy mandate outlined in Part A, the 2020-2025 Strategic Plan articulates the South African Tourism strategic focus, namely its vision, mission, and institutional 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 event 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. ▪ 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, tolerance and act with appreciation of diversity.
AUTHENTIC / CARING	We show and act with genuine care to each other, customers, shareholder, partners, suppliers, and the business.
RESPONSIBILITY	We take personal accountability for delivering work that exceeds customers' and stakeholders' expectations.
EXCELLENCE	We take pride in and commit to always meeting and exceeding our customers' and stakeholders' expectations with outstanding quality.

1. UPDATED SITUATIONAL ANALYSIS

1.1. EXTERNAL ENVIRONMENT ANALYSIS

1.1.1. GLOBAL AND REGIONAL CONTEXT

According to the World Tourism Organisation's (UNWTO) World Tourism Barometer, global tourism continued to suffer from January to September 2021, with international tourist arrivals dropping even though there was a slight improvement compared to 2020.

Figure 5:   Global International Tourist Arrivals
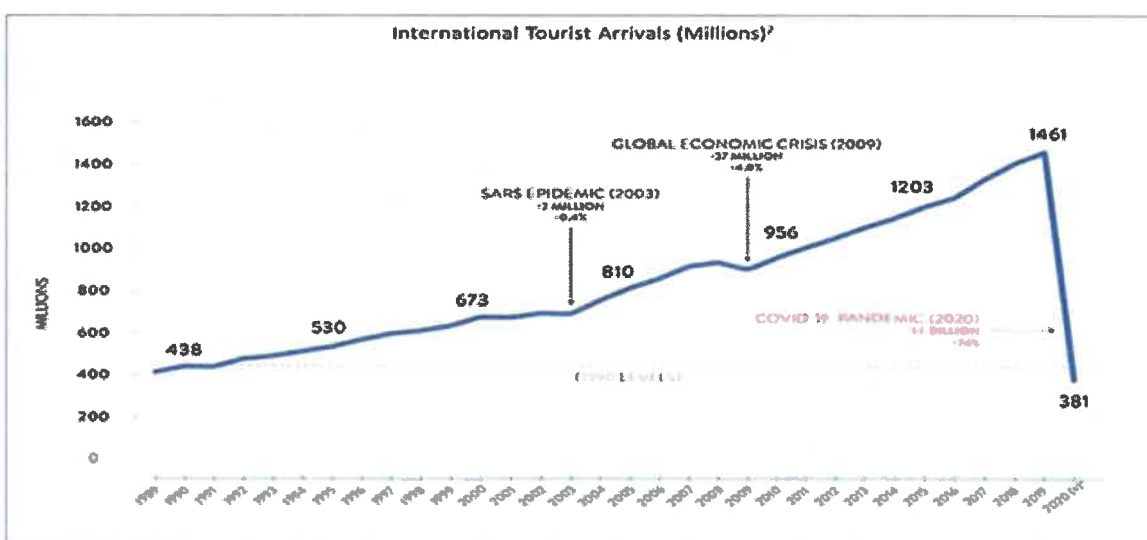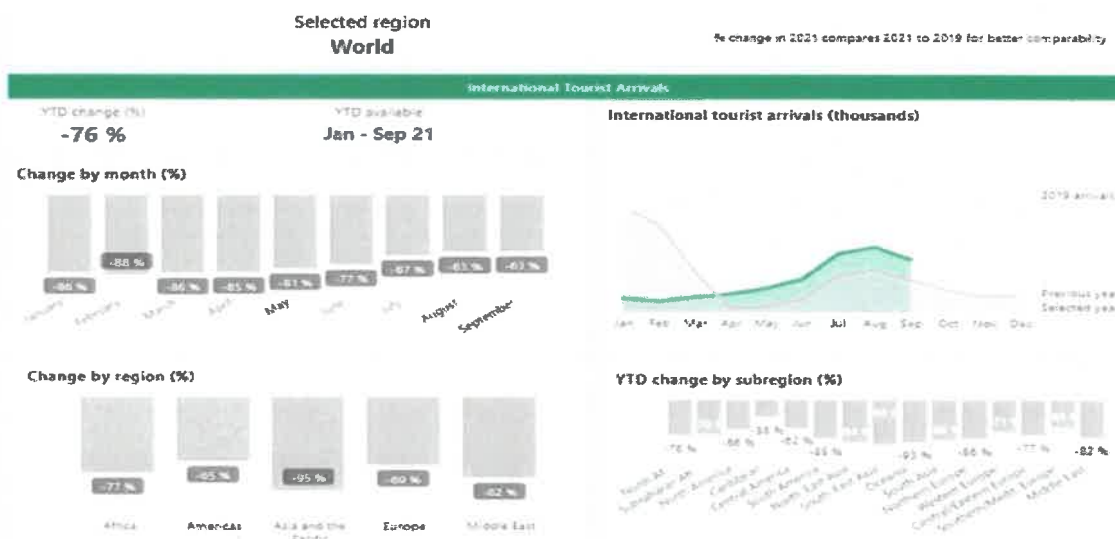
Source: UNWTO World Tourism Barometer, 2021

The devastating impact that the Covid-19 pandemic has had on travel and tourism globally is outlined in the World Travel and Tourism Council's (WTTC) latest Travel and Tourism Economic Impact Report. Global travel and tourism's contribution to GDP contracted by -49%, equivalent to USD 4.5 billion, whereas overall global GDP contracted by -3.7%. WTTC figures show a loss of 61 million jobs in the tourism sector, although previous survey-based estimates cited 121 million potential job losses in travel and tourism during 2020.

The industry's contribution to Africa's GDP in 2020 was also close to half of 2019 levels, representing 3.7% of GDP in 2020 versus 6.9% in 2019. The leisure sector suffered slightly less (49%) than business spending (-61%), whilst the impact on domestic tourism (-45%) was significantly smaller than losses in the international arena (-69%).

Figure 6:   Global Travel and Tourism Contribution to GDP

Source: WTTC Travel and Tourism Economic Impact Report, 2021

Figure 7:   Regional Travel and Tourism Contribution to GDP

Source: WTTC Travel and Tourism Economic Impact Report, 2021

Emerging tourism and travel trends, uncovered by the WTTC in its consumer survey, highlight the greater demand for domestic tourism.

Figure 8:   WTTC – Consumer Survey

Domestic travel preferred

58% of travellers will take primarily domestic trips for rest of 2020

Next leisure trip likely to be domestic
% of country's respondents

84%   69%   68%   63%

Emerging trends among travellers

40% of US travellers are re-thinking destinations, often in favour of beaches & small towns/rural areas

8.5 – 9 Average length of stay for short-term accommodations, up from previous average of 3.5 – 5 days

70% of North American leisure travellers say they would book during COVID-19 if changes were fee-free

Health and safety on the mind

92% of consumers trust word-of-mouth recommendations from family & friends

89% of Americans are more conscious of germs now than before COVID-19

80% of travellers fear potential quarantine as much as contracting the virus

69% of travellers cite cleanliness & health measures as a critical component of travel brands' crisis response

Digital technologies are on the rise...

69% of people who used videoconferencing for the first time during COVID-19 expect to continue

66% of consumers are using less cash and moving toward more contactless solutions

45% of air travel passengers are ready to shed their paper passports for digital identities

44% of travellers increased their time sent browsing social media during COVID-19

Environment
58% of consumers say they are thinking more about the environment since COVID-19

8% decrease in global CO2 emissions expected for 2020

Wildlife
78% of conservationists have been negatively impacted by COVID-19

50% drop in conservation jobs compared to normal levels

Equality
2,000+ global cities held anti-racism protests inspired by George Floyd

1,785% spike in Yelp searches for black-owned businesses

Employment
121M global Travel & Tourism jobs are estimated to be lost during the pandemic

68% of the Travel & Tourism workforce requires re-skilling

Travel restrictions and the lack of getaways in 2020 have led to an expected longer length of stay of nine days, as compared to five days previously.

Due to the pandemic, tourists and travellers are now much more aware of health and safety concerns. Moreover, quarantines and travel restrictions have forced consumers to become more familiar and adept at conducting leisure and business meetings over the web, as well as using digital payment and digital identification means.

Travellers and tourists are well aware that their absence from rural, outdoor, and wildlife travel has led, on the one hand, to a resurgence of nature and wildlife, but on the other hand, has come to mean a dramatic revenue and employment loss for these sectors.

Although there is greater uncertainty in the outlook, most predictions do not see a return to pre-pandemic 2019 levels happening before 2023.

Figure 9:   UNTWO - Prediction for Recovery

UNWTO conducted a global survey among its UNWTO Panel of Tourism Experts on the Impact of COVID-19 on tourism and the expected time of recovery
Data as collected by UNWTO, September 2021 · Published 04/10/2021
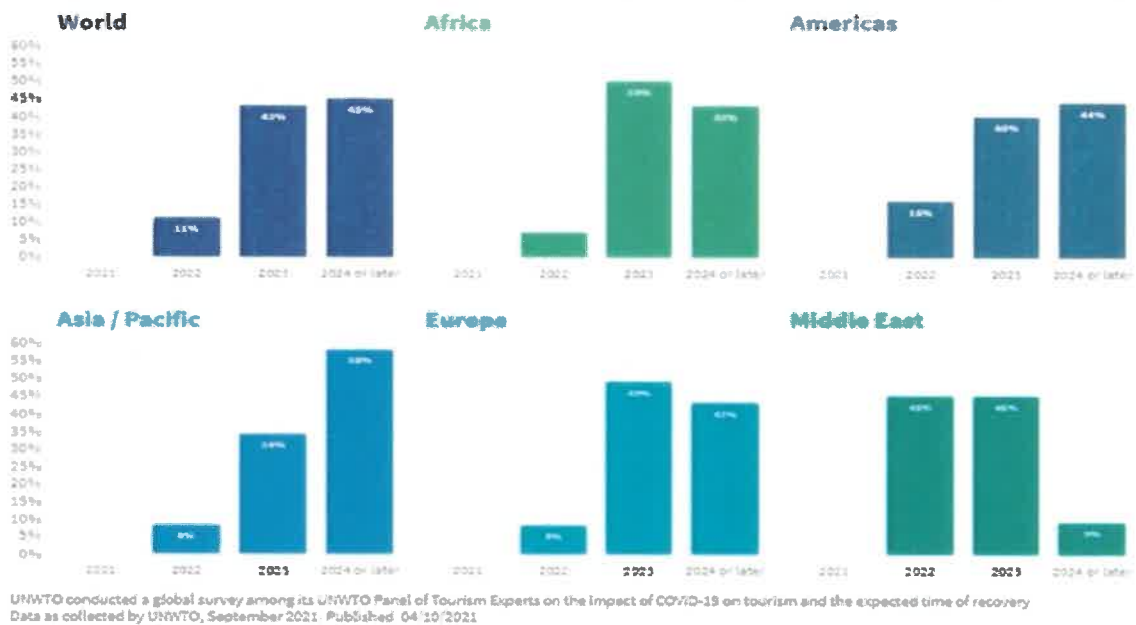
Source: UNWTO World Tourism Barometer, 2021

The extended scenarios are in terms of yearly totals, as opposed to growth.

The rebound is expected to continue in 2022, as travel conditions normalise and the pandemic is contained globally. However, international tourism could still take two and a half to four years to return to 2019 levels. The recovery times for each scenario are summarised below:

Figure 10: UNTWO – 2021 to 2024 Recovery Scenarios
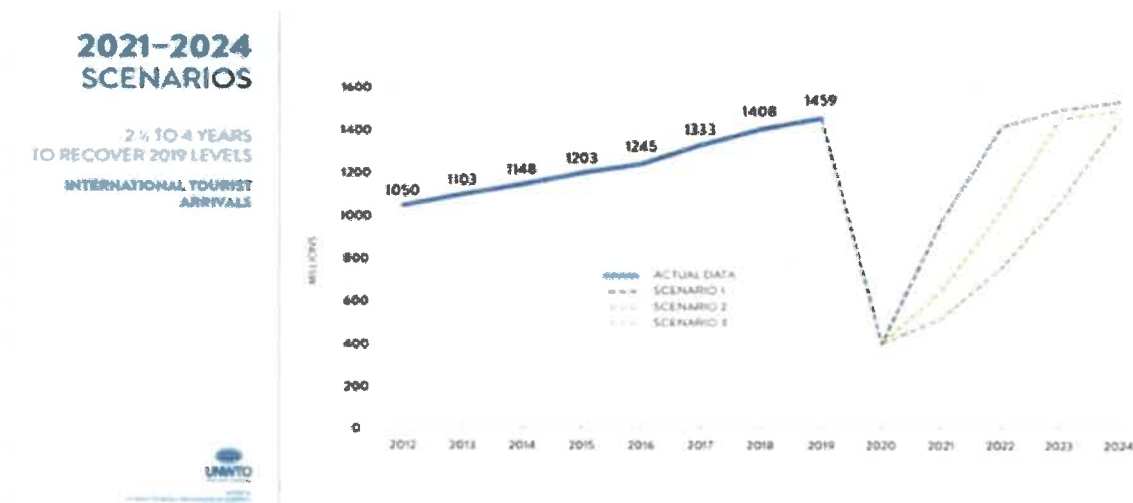
Source: UNWTO World Tourism Barometer, 2021

1.1.2. THE SOUTH AFRICAN TOURISM ROAD TO RECOVERY

As was reflected in Part A, Section 2.3, when considering the current unpredictable and volatile travel environment, the question of where and how to focus efforts on the road to recovery is critical. South African Tourism's Marketing Prioritisation and Investment Framework (MPIF), reviewed every three to five years, reconsiders the prospectus of source markets in order to optimise growth potential.

The 2020 review did not only refresh the data, but included new indicators, such as the health index, cost of travel, and country stringency index in the model, in order to ensure a robust view of the current travel environment. The MPIF priority markets were overlayed with pertinent information related to countries' rebound rates, and marketing investments were prioritised accordingly.

Figure 11: Recovery of International Tourist Arrivals into South Africa Relative to the Same Month in 2020
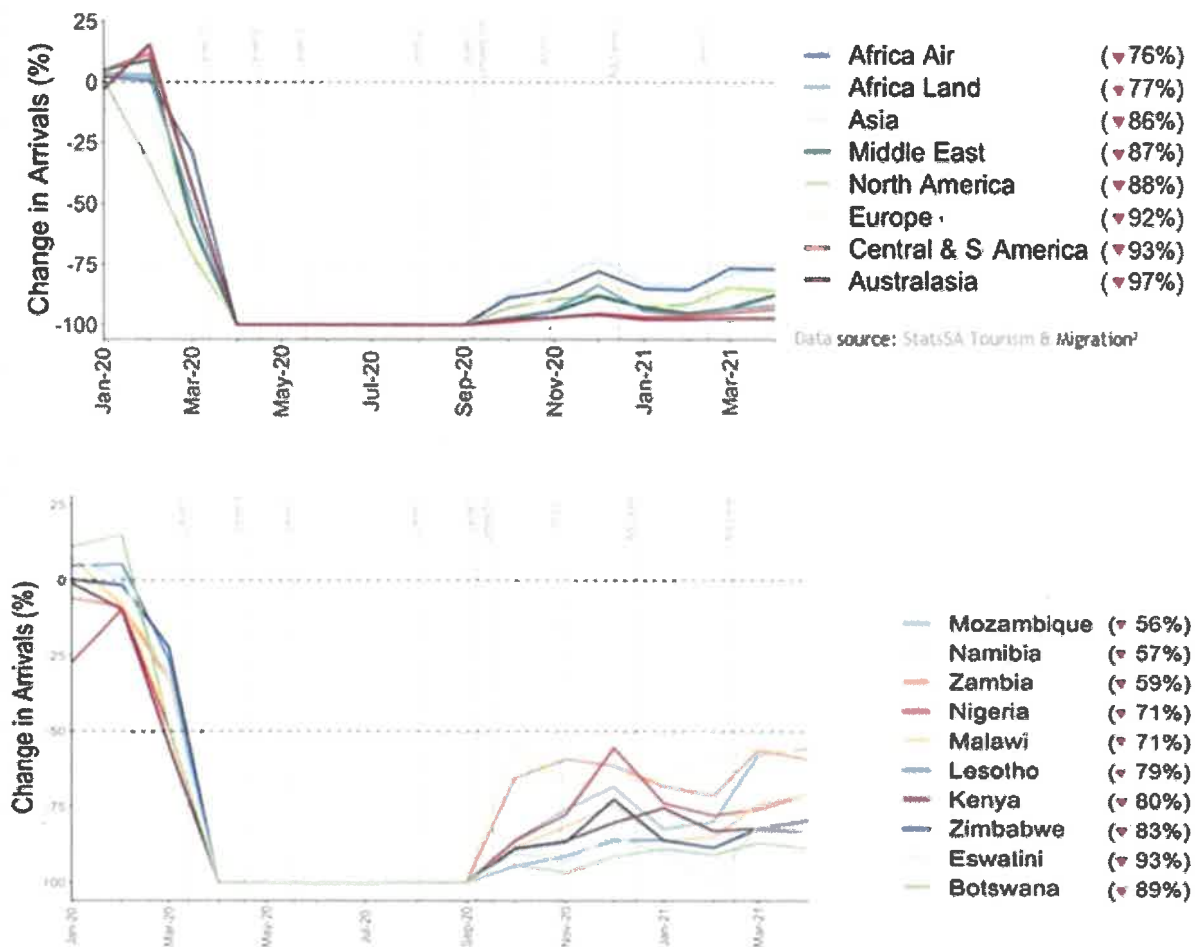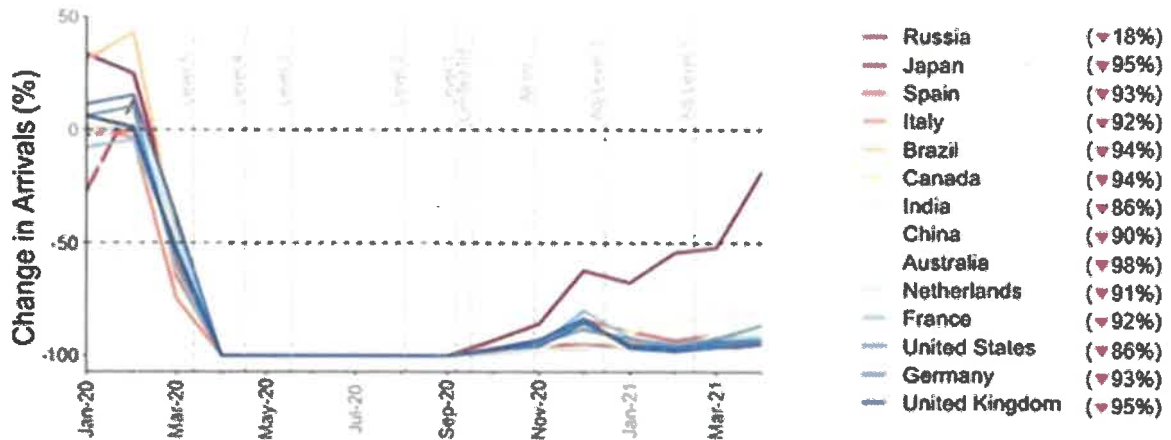
Africa Air	(▼76%)
Africa Land	(▼77%)
Asia	(▼86%)
Middle East	(▼87%)
North America	(▼88%)
Europe	(▼92%)
Central & S America	(▼93%)
Australasia	(▼97%)

Data source: StatsSA Tourism & Migration[1]

Mozambique	(▼ 56%)
Namibia	(▼ 57%)
Zambia	(▼ 59%)
Nigeria	(▼ 71%)
Malawi	(▼ 71%)
Lesotho	(▼ 79%)
Kenya	(▼ 80%)
Zimbabwe	(▼ 83%)
Eswatini	(▼ 93%)
Botswana	(▼ 89%)

Russia	(▼18%)
Japan	(▼95%)
Spain	(▼93%)
Italy	(▼92%)
Brazil	(▼94%)
Canada	(▼94%)
India	(▼86%)
China	(▼90%)
Australia	(▼98%)
Netherlands	(▼91%)
France	(▼92%)
United States	(▼86%)
Germany	(▼93%)
United Kingdom	(▼95%)

Source: South African Tourism, citing StatsSA Tourism and Migration statistical reports

The importance of domestic tourism in supporting tourism recovery in the medium term is also 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 re-imagination of tourism in South Africa focusing on servicing and growing domestic and regional tourism to drive recovery of the tourism sector in the near to medium term.

Figure 12: Relative Contribution to South Africa's Tourism Spend (ZAR Billions) of Priority Source Markets by Region, 2019 to 2022
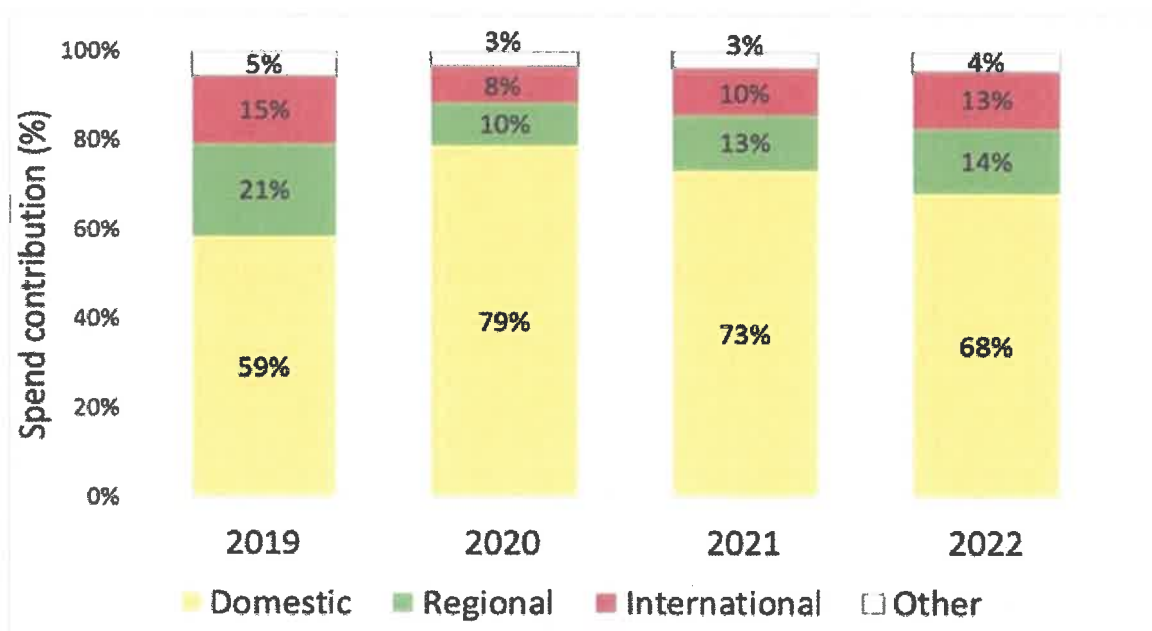
Source: Oxford Economics

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 on 27th March 2020. However, easing of movement restrictions after July 2020 resulted in signs of recovery in all accommodation segments. By October 2020, the most significant recovery had occurred in caravan and camping (-30%), home-sharing (-41%), and "other" (-40%) accommodation types, indicating a preference for outdoor and smaller establishment types. The observed recovery is attributable primarily to domestic and regional tourism and economic activity since international travel has been minimal.

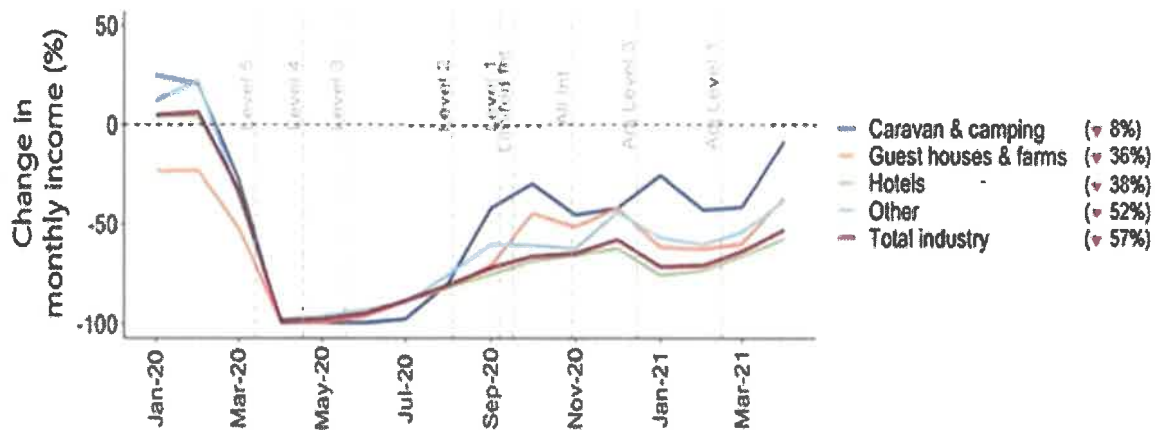**Figure 13: Percentage Change in Occupancy in 2020 Relative to the Same Month in 2019**

Source: South African Tourism, citing StatsSA Tourism and Migration Statistical Reports

The current and medium-term outlook for international travel, on the other hand, is volatile and will continue to be in constant flux from week to week and month to month as the virus evolves, pandemic trajectories fluctuate and, as vaccine development and dissemination advances, creating an environment where it is impossible to predict travel resumption.

It is thus crucial for South African Tourism's marketing efforts to be dynamic and adaptive to differing pandemic phases in relevant markets to achieve the longer-term desired growth. Therefore, there is a need for a consistent presence in the prioritised markets to ensure South Africa remains embedded as a top-of-mind destination.

1.2. INTERNAL ENVIRONMENT ANALYSIS

A degree of uncertainty continues to characterise South African Tourism's operating environment. Despite this challenge, the organisation responds to the best of its ability, given prevailing resource constraints. The pandemic has reinforced the notion that adaptability is a critical organisation characteristic that organisation's need to enhance.

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. Currently, the organisational structure – and the context in which strategic planning is conducted – is not optimally designed to support the level of agility demanded by current and future operating contexts.

Furthermore, to enable the sector to recover and become more resilient to potential future disruptions, South African Tourism will need to shift from a focus on purely destination marketing to supporting the tourism sector in a much more robust manner. This requires the re-engineering of its analytics and insight capabilities, digital transformation, and driving strategic partnerships and collaboration in a more deliberate manner.

To this end, South African Tourism has infused its strategic response with measures to accelerate and improve the organisation's powers to perceive and respond to changes in the operating context, to adapt faster, and to enhance its impact delivery.

1.2.1. THE SOUTH AFRICAN TOURISM TRANSFORMATION TO A DXO

It has been demonstrably proven by the COVID-19 disruption that the South African Tourism operating model, organisational structure, and ways of working must be optimised to enable rapid adaptability to remain relevant and impactful in the sector.

South African Tourism is alert to the fact that the COVID-19 pandemic is merely one of a potential set of disruptive events that have been identified as potentially occurring in the future. Others may include social instability arising from the growing wealth gap (recent events concerning rioting and looting serve as an indicator of this underlying potential, with clear 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 strategic and operational orientation from a reactive to a proactive stance.

The need for this fundamental shift is recognised in the South African Tourism ambition to transform from a traditional Destination Marketing Organisation (DMO) to a Destination "X" Organisation (DXO) within the ambit of its mandate. The fundamental design principle of the DXO is a response to the imperative for organisational adaptability expressed above, in that the "X" is representative of the notion that a successful and sustainable destination marketing organisation must be able to respond to change occurring in the operating context *proactively, rapidly,* and *accurately.* This results in the organisation maintaining relevance to its stakeholders and, therefore, its ability to deliver value and achieve a meaningful return on investment.

Figure 14: Transformation from DMO to DXO

The central organising principle of SAT's DXO journey is the end-to-end tourist experience, supported by greater agility and data-centricity.

The guiding principles, challenges and opportunities for SAT inform the organisation's vision and the institutional architecture that SAT should adopt.

Since tourist experience is a function of the efforts of numerous sector participants, our role is to guide and enable these stakeholders. Achieving this necessitates having the necessary capabilities and resources to both understand and meet their needs timeously.

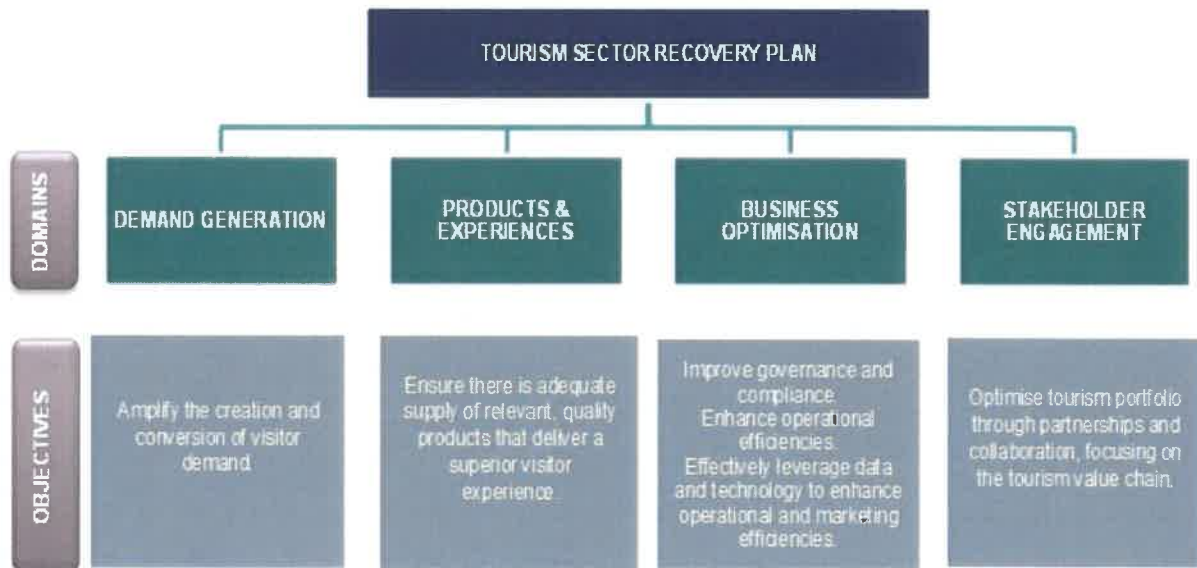**GUIDING PRINCIPLES**

CHALLENGES AND OPPORTUNITIES

VISION

Understanding the drivers of destination development supports DMOs in understanding and solidifying their role in industry:

Promotion Investment (Demand) + Destination Development, Products & Experiences (Supply) = Responsible Visitor Economy Growth

Enabling Environment (e.g. tourism leadership, policy, labour, land access, resources, community engagement, investment attraction)

Infrastructure (e.g., air access, roads, wi-fi, conference centres, major attractions)

DMO — x — DXO

Strategic leadership is required to bring industry stakeholders together:

- Scope for collective action and common goal-setting
- Engagement with all tourism stakeholders to foster partnerships between them
- Harmonise divergent interests and seek solutions to chronic problems and opportunities
- Build an environment of confidence in tourism and act as the key influencer in the tourism sector and destination

- Articulate roles and responsibilities to position SA Tourism as a knowledgeable and expert leader
- Fund-raising and resource mobilisation
- Integrate local communities for tourism by demonstrating mutually beneficial relationships
- Promote tourism culture in the destination and among stakeholders and residents
- Formulate a vision and strategic plan as well as an effective execution of that plan

Within this context, South African Tourism will focus on four strategic domains, as reflected below:

Figure 15: South African Tourism Strategic Domains and Objectives

TOURISM SECTOR RECOVERY PLAN

DOMAINS

DEMAND GENERATION	PRODUCTS & EXPERIENCES	BUSINESS OPTIMISATION	STAKEHOLDER ENGAGEMENT

OBJECTIVES

| Amplify the creation and conversion of visitor demand	Ensure there is adequate supply of relevant, quality products that deliver a superior visitor experience	Improve governance and compliance. Enhance operational efficiencies. Effectively leverage data and technology to enhance operational and marketing efficiencies.	Optimise tourism portfolio through partnerships and collaboration, focusing on the tourism value chain.

Across the four domains, broadly speaking, 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 markets; and secondly, to orient for the future of tourism in an environment of rapid change.

1.2.2. THE SOUTH AFRICAN TOURISM OPERATING MODEL TO INFORM THE FY2022/23 PLAN

Giving effect to the South African Tourism Transformation Journey described above, the South African Tourism Value Chain Model is as follows:

Figure 16: South African Tourism Value Chain
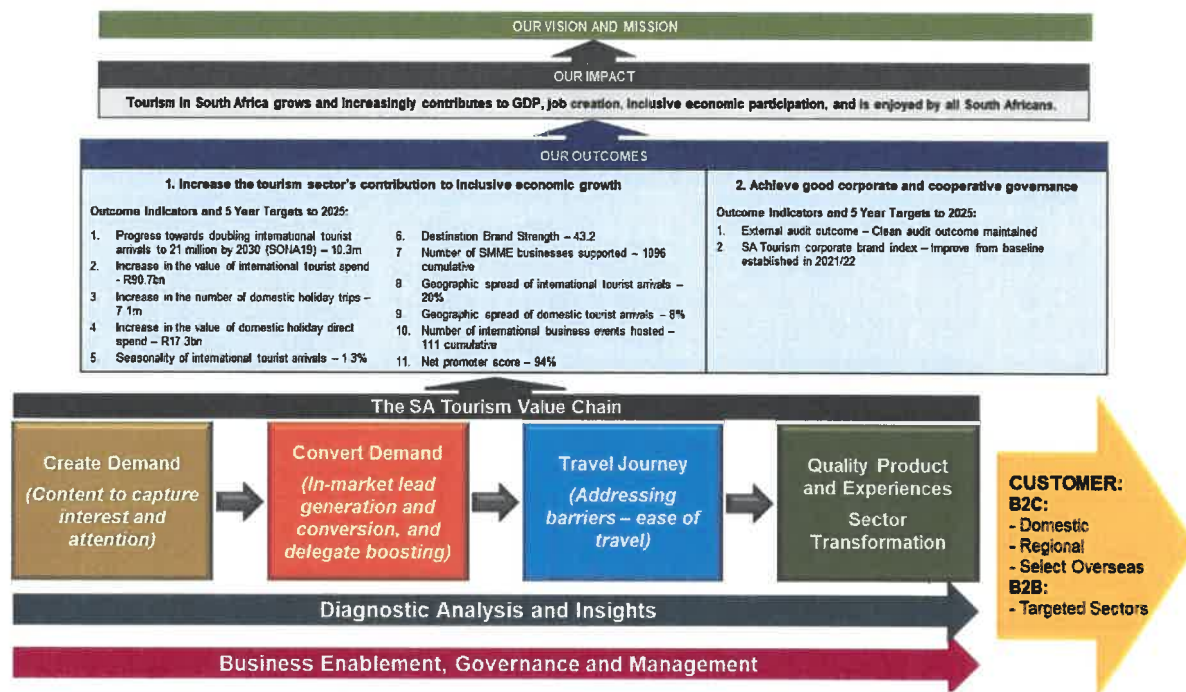
Unpacking the above Value Chain Model then informs the South African Tourism priorities and focus areas for FY2022/23 and the MTEF, as follows:

Figure 17: South African Tourism Priorities and Focus Areas

	Create Demand (Content to capture interest and attention)	Convert Demand (In-market lead generation and conversion)	Travel Journey (Addressing barriers – ease of travel)	Quality Product and Experiences

Key drivers/ deliverables	▪ **Leisure, Business and Corporate:**
	  o Integrated global brand and communication strategy.
	▪ **Global Advocacy Campaign**
	  o Brand innovation – ideas to drive brand.
	  o Release Communication
		▪ **B2C - Domestic, Africa, overseas in-market focus:**
		  o In-market campaigns.
		  o Packaging and availability of deals suited to market.
		  o Engagement and mobilisation in market.
			▪ **Whole of State Approach to tourism (SA-Inc.):**
			  o Joint coordination for Tourism Programme.
			  o Craft a compelling story for tourism.
			  o Available information, e.g. economic impact and cost impact of barriers.
				▪ **Welcome Programme** – Including toolkit, capacitating industry, training and upskilling.
				▪ **Trade Re-imagined Programme.**
				▪ **Roll-out of BQV Project to all provinces.**

	Create Demand (Content to capture interest and attention)	Convert Demand (In-market lead generation and conversion)	Travel Journey (Addressing barriers – ease of travel)	Quality Product and Experiences
	Programme (media briefing, Tourism Trade briefing) ■ **Major strategic events: (e.g., MA, Indaba etc.)**	■ **B2B – Economic sector focused campaigns:** ○ Bidding and hosting. ○ Delegate boosting.	■ **Engagement with specific value chain partners (e.g., foreign missions).**	
Secondary deliverables	■ Norms and standards – policy and processes to support standardisation across the markets. ■ Brand PR: +27 SA lifestyle activations. ■ **Enhanced lead generation framework.**	■ Leverage non-traditional channels. ■ **Revised BSP (Bid Support Programme).**	■ South African Tourism **thought leadership pieces.** ■ **Quarterly review publications.**	■ **Supply-side audit** ○ Leverage product to spark demand. ○ Partner with trade to amplify the brand. ■ Product Visitation Programme (visiting specific products to drive messages on product quality, transformation, resilience).
Transformation deliverables	■ Procurement spend.	■ Diversification and market access. ■ **Events hosted in VTSDs.**	■ Tourism model for communities.	■ Strategic partners as a lever to drive transformation agenda.
Expand capabilities through partnerships	■ Partnership Policy - partnerships to maximise demand creation ■ Brand SA alignment – reigniting the brand.	■ Partnership Policy - partnerships to maximise demand creation. ■ Brand SA alignment – in-market messaging.	■ Collaborate and define roles between DT, PTA/LTA, Trade (e.g., to address barriers)	■ **Calibration and upgrading of Grading Council -** review of Quality Assurance Framework.

	Business Enablers
Diagnostic Analysis and Insights (Understand market and segments)	■ **Accurate and up-to-date data and information:** ○ Ease of access to information. ○ Thought Leadership for the sector – releasing of publications. ○ Utilise customer journey mapping as data organising approach. ■ Management decision dashboard - dynamic indicators, analytics and control measurement framework.
Business Enablement, Governance and Management	**Technology and data sources – technology investment:** ■ 100% System availability across all platforms and applications. ■ Working tech – websites, fully-functional deals dashboard and pages. ■ Travel Tech Programme - contactless tourism value chain. ■ Optimise SCM digitisation and implementation of SCM processes. **Human capital management and development:** ■ Performance-driven - optimised performance management approach. ■ Communication to drive culture and re-build trust.

Business Enablers
▪ Address vacancies and cultivate talent.
▪ Global wellness programme.
▪ Optimise training and development, including technological upskilling of staff.

Arising from the above, the short and medium-term priorities inform the performance plan for FY2022/23, 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 2020-2025 Strategic Plan presents the outcomes for the five years, aligned to the NDP 2030, MTSF 2019-2024, and the Department of Tourism's strategic priorities and the TSRP.

1. INSTITUTIONAL PROGRAMME PERFORMANCE INFORMATION

South African Tourism is constituted by the following 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 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 is responsible for providing effective support services to the organisation and ensuring compliance with statutory requirements. The Corporate Support Programme covers the work of the following business divisions:

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

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 Strategic Plan:

Institutional Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)
2. Achieve good corporate and cooperative governance	External audit outcome	Unqualified audit outcome	Unqualified audit outcome maintained

The 2022/23 performance plan of Programme 1 is reflected in the log frame tables below:

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

| OUTCOME | OUTPUTS | OUTPUT INDICATORS | AUDITED PERFORMANCE | | | ESTIMATED PERFORMANCE | MTEF TARGETS | | |
			2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
2. Achieve good corporate and cooperative governance	2.1. Internal control	2.1.1. Percentage implementation of valid internal and external audit recommendations	N/A	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
		2.1.2. Risk maturity level	N/A	N/A	N/A	New indicator	Improved risk maturity level from 2 to 3	Improved risk maturity level from 3 to 4	Improved risk maturity level from 4 to 5
	2.2. Financial management	2.2.1. Payment of compliant invoices within 30 days from date of receipt	New indicator	100%	100%	100%	100%	100%	100%
	2.3. Business digitisation and optimisation	2.3.1. Automation of identified business processes	N/A	New indicator	The annual target was not achieved.	Tourism Grading Council of South Africa (TGCSA) business processes automated with the launch of the Total Quality in Tourism (TQiT) System. Redesign of business processes for Human Capital, Supply Chain Management,	Automation of identified and mapped business processes	Finalisation of automation projects initiated in 2022/23 Establishment of operational performance baseline and optimisation parameters	Continuous improvement in operational performance and optimisation parameters

OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
	2.4. Human capital management and development					Facilities and Finance departments. Development and deployment of a Business Process Management (BPM) System.			
		2.4.1. Staff engagement score	3.4 Staff engagement score	3.57 Staff engagement score	3.75 Staff engagement score	3.4 Staff engagement score	3.4 Staff engagement score	3.4 Staff engagement score	3.4 Staff engagement score
		2.4.2. Implementation of Employment Equity Plan:	N/A	New indicator					
		▪ Percentage of women in South African Tourism			63%	60%	60%	60%	60%
		▪ Percentage of women in senior and top management positions			53%	50%	50%	50%	50%
		▪ Percentage of people with disabilities employed			2%	2%	2%	2%	2%
		▪ Maintain at least 60% Black people (Africans, Coloureds, and Indians) across all occupational levels			New indicator	60%	60%	60%	60%

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

OUTPUT	OUTPUT INDICATORS	2022/23 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2022	Q2 Jul - Sep 2022	Q3 Oct - Dec 2022	Q4 Jan - Mar 2023
2.1. Internal control	2.1.1. 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
	2.1.2. Risk maturity level	Improved risk maturity level from 2 to 3	Implementation of the recommendations from the Risk Management Maturity Assessment Report 2020/21	Implementation of the recommendations from the Risk Management Maturity Assessment Report 2020/21	Conduct a risk management maturity assessment 2022/23	Implementation of the recommendations from the Risk Management Maturity Assessment 2022/23
2.2. Financial management	2.2.1. Payment of compliant invoices within 30 days from date of receipt	100%	100%	100%	100%	100%
2.3. Business digitisation and optimisation	2.3.1. Automation of identified business processes	Automation of identified and mapped business processes	Go-live and adoption of business processes automated by ICT Works; Initiate e-procurement portal build	Initiate automation of NCB mapped business processes, and agile go-live of ready processes	Initiate automation of Digitech and VE mapped business processes, and agile go-live of ready processes	Initiate automation of TE and B&M mapped business processes, and agile go-live of ready processes
2.4. Human capital management and development	2.4.1. Staff engagement score	3.4 Staff engagement score	Implementation of the improvement actions from the 2021/22 staff engagement assessment	Implementation of the improvement actions from the 2021/22 staff engagement assessment	Implementation of the improvement actions from the 2021/22 staff engagement assessment	Conduct staff engagement assessment to reflect targeted 3.4 staff engagement score

OUTPUT	OUTPUT INDICATORS	2022/23 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2022	Q2 Jul - Sep 2022	Q3 Oct - Dec 2022	Q4 Jan - Mar 2023
	2.4.2. Implementation of Employment Equity Plan:					
	▪ Percentage of women in South African Tourism	60%	60%	60%	60%	60%
	▪ Percentage of women in senior and top management positions	50%	50%	50%	50%	50%
	▪ Percentage of people with disabilities employed	2%	2%	2%	2%	2%
	▪ Maintain at least 60% Black people (Africans, Coloureds, and Indians) across all occupational levels	60%	60%	60%	60%	60%

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

The Corporate Support Programme offers support services to South African Tourism's core business to deliver its mandate. This programme deals with South African Tourism's resources, both human and financial, and strives for delivering efficiency within the organisation.

The focus for 2022/23 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 (SLA and activity-based cost) across the organisation. This requires a focus on attracting and retaining the best talent to deliver on the organisation's outcomes and on establishing cross-functional teams made up of people who have responsibilities along the lines of what they do best.

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 through the implementation of the Employment Equity Plan.

1.1.5. PROGRAMME 1: RESOURCE CONSIDERATIONS

Programme 1: Administration (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Economic classification:							
Compensation of employees	45,992	48,568	54 610	56,794	59,066	61,429	63,886
Goods and services	76,008	75,757	50 773	91,685	91,530	92,453	96,906
Depreciation	10,271	10,846	5 961	6,289	7,498	7,835	8,187
Total expenses	**132,271**	**135,171**	**111 344**	**154,768**	**158,094**	**161,717**	**168,979**
Staff complement (no.)	56						

1.2. PROGRAMME 2: BUSINESS ENABLEMENT

1.2.1. PROGRAMME PURPOSE

The Business Enablement Programme is responsible for enhancing collaboration with various stakeholders and to provide centralised tourism intelligence to support evidence-based decision-making. The Business Enablement Programme covers the work of the following business divisions:

Business Division	Purpose
Office of the Chief Executive Officer, and Strategic Planning, Evaluation and Programme Management	**Stakeholder Management:** To enhance collaboration with various stakeholders.
Digitech	To enable visualisation and interaction with data obtained from digital channels, dynamic reporting, and data-driven digital marketing execution.
Analytics and Insights	To provide centralised tourism intelligence and establish South African Tourism as a thought leader in the sector.

In contributing towards the South African Tourism impact of *"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 Strategic Plan:

Institutional Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)
2. Achieve good corporate and cooperative governance	South African Tourism Corporate Brand Index	New indicator	Improvement from 2021/22 baseline

The 2022/23 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	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
2. Achieve good corporate and cooperative governance	2.6. Enabling the business	2.6.1. South African Tourism Corporate Brand Index	N/A	N/A	New indicator	Conduct a survey to establish a new baseline for South African Tourism Corporate Brand Index	70.24 South African Tourism Corporate Brand Index	72.24 South African Tourism Corporate Brand Index	74.24 South African Tourism Corporate Brand Index
		2.6.2. Integrated Digital and Analytics Operating Framework and annual roadmap implemented	N/A	N/A	New indicator	Conclusion of digital transformation milestones outlined in Divisional Operational Plan. Approved reconceptualisation on the B2B/B2C portal as a component of the overall digital transformation initiatives.	Integrated Digital and Analytics Operating Framework finalised. Implementation of Year 1 (2022/23) Roadmap.	Implementation of Year 2 (2023/24) Roadmap	Dynamic reporting and data-driven digital marketing execution

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

OUTPUT	OUTPUT INDICATORS	2022/23 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2022	Q2 Jul - Sep 2022	Q3 Oct - Dec 2022	Q4 Jan - Mar 2023
2.6. Enabling the business	2.6.1. South African Tourism Corporate Brand Index	70.24 South African Tourism Corporate Brand Index	Review the outcomes of the 2021/22 survey against planned stakeholder engagement programme, and revise where required	Implementation of the revised improvement plan	Implementation of the revised improvement plan	2022/23 survey conducted, reflecting 70.24 South African Tourism Corporate Brand Index
	2.6.2. Integrated Digital and Analytics Operating Framework and annual roadmap implemented	Integrated Digital and Analytics Operating Framework finalised Implementation of Year 1 (2022/23) Roadmap	Finalise appointment of service providers for digital development support, panel of service providers, data warehouse, security tools/cybersecurity	Integrated Digital and Analytics Operating Framework finalised Year 1 (2022/23) Roadmap submitted for approval to the South African Tourism Executive Committee (Exco)	Execution of the integrated Digital and Analytics Operating Framework through implementation of the Year 1 (2022/23) Roadmap	Execution of the integrated Digital and Analytics Operating Framework through implementation of the Year 1 (2022/23) Roadmap Year 2 (2023/24) Roadmap submitted for approval to the South African Tourism Executive Committee (Exco)

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

The Business Enablement Programme enables the core business to deliver on its strategic objectives through the delivery of 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 is conducted to enable business growth. Specific focus will be given to building a deeper understanding of the barriers to travel and experience.

The success of delivering the mandate of tourism is dependent on coordination among different stakeholders. In 2022/23 and beyond, focus will be given to strengthening collaboration and better defining roles between South African Tourism, DT, PTA/LTA, TBCSA, and trade. This collaboration includes working with embassies, consulates, interest groups and apex bodies.

Numerous benefits will be realised from the Digital Transformation Programme, including operational efficiencies, cost efficiencies, and new revenue generation models. While the programme is long term in nature, the implementation of key components will help support strategic adaptability and an integrated operating model in the short term, including the implementation of the data strategy, and driving and endorsing a digital culture across the organisation and the sector.

Following the completion of the data strategy, its implementation will be fast-tracked to harness the benefits as speedily as possible. Data is a strategic asset that underpins the success of all modern organisations, and this capability should be institutionalised as rapidly as possible.

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 in the sense that people are required to harness the technology for value to be derived from the investment. Shifting culture is a complex task that requires people to be supported with the requisite training, change management, and leadership guidance for them to change their way of working. Without a formal change approach, attempts at adopting emerging technology to drive business change will not realise their full potential.

1.2.5. PROGRAMME 2: RESOURCE CONSIDERATIONS

Programme 2: Business Enablement (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Economic classification:							
Compensation of employees	13,937	14,717	14 717	15,306	15,918	16,555	17,217
Goods and services	71,993	74,983	25 124	65,679	68,703	71,866	75,174
Total expenses	85,929	89,700	39 841	80,985	84,621	88,421	92,391
Staff complement (no.)	11						

1.3. PROGRAMME 3: LEISURE TOURISM MARKETING

1.3.1. PROGRAMME PURPOSE

The Leisure Tourism Marketing Programme is responsible for creating demand through travel acquisition and growing brand equity for South Africa as a leisure and business events destination in identified markets.

The Leisure Tourism Marketing Programme covers the work of the following business divisions:

Business Division	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.

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 Strategic Plan:

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

Institutional Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)
	Seasonality of international tourist arrivals	1.36%	1,3%
	Destination brand strength	39,9	43.2
	Geographic spread of international tourist arrivals	20%	20%
	Geographic spread of domestic tourist arrivals	8%	8%

The 2022/23 performance plan of Programme 3 is reflected in the log frame tables below:

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

OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
1. Increase the tourism sector's contribution to inclusive economic growth	1.1. Global Tourism Brand Campaign	1.1.1. Global Tourism Brand Campaign Plan implemented	N/A	N/A	New indicator	2021/22 Global Tourism Brand Campaign Plan launched and implemented\n\nApproval of 2022/23 Global Tourism Brand Campaign Plan	2022/23 Global Tourism Brand Campaign Plan implemented\n\nApproval of 2023/24 Global Tourism Brand Campaign Plan	2023/24 Global Tourism Brand Campaign Plan implemented\n\nApproval of 2024/25 Global Tourism Brand Campaign Plan	2024/25 Global Tourism Brand Campaign Plan implemented\n\nApproval of 2025/26 Global Tourism Brand Campaign Plan
	1.2. Integrated Destination Brand and Marketing Strategy	1.2.1. Integrated Destination Brand and Marketing Strategy implemented	N/A	N/A	N/A	New indicator	Three-year Integrated Global Marketing Strategy\n\nImplementation of Year 1 (2022/2023) Roadmap\n\nYear 2 (2023/24) Implementation Roadmap approved	Implementation of Year 2 (2023/24) Roadmap\n\nYear 3 (2024/25) Implementation Roadmap approved	Implementation of Year 3 (2024/25) Roadmap\n\nReview and assessment of three-year Integrated Global Marketing Strategy
	1.3. Global Brand Activations	1.3.1. Number of Global Brand Activations implemented	N/A	N/A	N/A	World Expo Dubai 2020\n\nTourism Month Launch	4 Global Brand Activations implemented	4 Global Brand Activations implemented	4 Global Brand Activations implemented

OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
	1.4. Global Advocacy Programme	1.4.1. Elements of the Global Advocacy Programme implemented	N/A	N/A	New indicator	Concept for Global Advocacy Programme defined	Elements of the Global Advocacy Programme implemented: o Travel barrier removal communications roadmap for each source market o Amplification of communication around strategic events o "Always On" content management roadmap	Review the implementation and implement planned enhancements of: o Travel barrier removal communications roadmap for each source market o Amplification of communication around strategic events o "Always On" content management roadmap	Review the implementation and implement planned enhancements of: o Travel barrier removal communications roadmap for each source market o Amplification of communication around strategic events o "Always On" content management roadmap
	1.5. In-market campaigns	1.5.1. Number of domestic campaigns delivered	N/A	N/A	New indicator	4 domestic campaigns delivered	3 domestic campaigns delivered	3 domestic campaigns delivered	3 domestic campaigns delivered
		1.5.2. Number of regional (Africa) campaigns delivered	N/A	N/A	New indicator	1 regional campaign delivered	4 regional campaigns delivered	4 regional campaigns delivered	4 regional campaigns delivered
		1.5.3. Number of international (overseas) campaigns delivered	N/A	N/A	New indicator	15 international campaigns delivered	15 international campaigns delivered	15 international campaigns delivered	15 international campaigns delivered

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

OUTPUT	OUTPUT INDICATORS	2022/23 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2022	Q2 Jul - Sep 2022	Q3 Oct - Dec 2022	Q4 Jan - Mar 2023
1.1. Global Tourism Brand Campaign	1.1.1. Global Tourism Brand Campaign implemented	2022/23 Global Tourism Brand Campaign Plan implemented

Approval of 2023/24 Global Tourism Brand Campaign Plan | Implementation of Q1 milestones of the approved 2022/23 Global Tourism Brand Campaign Plan | Implementation of Q2 milestones of the approved 2022/23 Global Tourism Brand Campaign Plan | Implementation of Q3 milestones of the approved 2022/23 Global Tourism Brand Campaign Plan | Implementation of Q4 milestones of the approved 2022/23 Global Tourism Brand Campaign Plan

Approval of 2023/24 Global Tourism Brand Campaign Plan |
| 1.2. Integrated Destination Brand and Marketing Strategy (incl. Leisure & Business & Corporate) | 1.2.1. Integrated Destination Brand and Marketing Strategy implemented | Three-year Integrated Destination Brand and Marketing Strategy

Implementation of Year 1 (2022/2023) Roadmap

Year 2 (2023/24) Implementation Roadmap approved | Approved three-year year Integrated Destination Brand and Marketing Strategy, incorporating:
- Global PR & Communications Plan (inclusive of Internal Communications Strategy & Spokespersons Strategy)
- Creative Strategy
- Global Marketing Plan | Year 1 (2022/23) Implementation Roadmap approved | Implementation of Q3 milestones of Year 1 (2022/23) Roadmap | Implementation of Q4 milestones of Year 1 (2022/23) Roadmap

Year 2 (2023/24) Implementation Roadmap approved |
| 1.3. Global Brand Activations | 1.3.1. Number of Global Brand Activations implemented | 4 Global Brand Activations implemented | 1 Global Brand Activation implemented | 1 Global Brand Activation implemented | 1 Global Brand Activation implemented | 1 Global Brand Activation implemented |

OUTPUT	OUTPUT INDICATORS	2022/23 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2022	Q2 Jul - Sep 2022	Q3 Oct - Dec 2022	Q4 Jan - Mar 2023
1.4. Global Advocacy Programme	1.4.1. Elements of the Global Advocacy Programme implemented	Elements of the Global Advocacy Programme implemented: o Travel barrier removal communications roadmap for each source market	Travel barrier removal communications roadmap for each source market developed, approved and implemented	Travel barrier removal communications roadmap for each source market developed, approved and implemented	Travel barrier removal communications roadmap for each source market developed, approved and implemented	Travel barrier removal communications roadmap for each source market developed, approved and implemented
		o Amplification of communication around strategic events	Implementation of strategic events communications calendar for Q1.	Implementation of strategic events communications calendar for Q2	Implementation of strategic events communications calendar for Q3	Implementation of strategic events communications calendar for Q4
		o "Always On" content management roadmap	"Always On" content management roadmap Quarter 1 milestones implemented	"Always On" content management roadmap Quarter 2 milestones implemented	"Always On" content management roadmap Quarter 3 milestones implemented	"Always On" content management roadmap Quarter 4 milestones implemented
1.5. In-market campaigns	1.5.1. Number of domestic campaigns delivered	3 campaigns delivered	Approved Campaign Plan 1 (2022/23)	Campaign 1 (2022/23) delivered Approved Campaign Plan 2 (2022/23)	Campaign 2 (2022/23) delivered Approved Campaign Plan 3 (2022/23)	Campaign 3 (2022/23) delivered
	1.5.2. Number of regional (Africa) campaigns delivered	4 campaigns delivered	Annual Campaign Plan approved	Implementation against Campaign Plan	Implementation against Campaign Plan	Implementation against Campaign Plan 4 campaigns delivered
	1.5.3. Number of international (overseas) campaigns delivered	15 campaigns delivered	8 campaign plans approved	Quarterly Campaign Report for 8 Campaigns 4 campaign plans approved	Quarterly Campaign Report for 12 Campaigns 3 campaign plans approved	Quarterly Campaign Report for 15 Campaigns 15 campaigns delivered

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

The Leisure Tourism Marketing Programme delivers on the President's call to revitalise the destination and brand and deliver on a significantly increased number of 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, and the revised post-COVID-19 projections now stand at 14.8 million arrivals in 2030. A new growth approach must, therefore, be employed to achieve any additional tourist arrivals beyond those reflected by the projection.

In this regard, and in support of the South African Tourism strategic focus on domestic, regional, and select global markets, the focus for 2022/23 and beyond is to stimulate:

1) Domestic demand by growing trips and diversifying supply (through increased geo-spread, reduced seasonality) to contribute to growth and to support recovery (impact metric based on jobs and direct/total spend).

2) Regional demand by growing trips and diversifying supply (through increased geo-spread, reduced seasonality) to contribute to growth and to support recovery (impact metric based on jobs and direct/total spend):

   a) LAND HUB - Encourage repeat travellers to travel more frequently by providing relevant VFM deals and discounts that show new, fun, and varied experiences.

   b) CENTRAL AFRICA - Market directly to repeat visitors by enticing them to take more holiday breaks through a variety of experiences, value for money, cosmopolitan, leisure experiences.

   c) EAST AFRICA - Position South Africa as a friendly and welcoming destination that offers immersive, authentic leisure experiences underpinned by people and culture, while showcasing scenic beauty to inspire East Africans to travel to South Africa.

   d) WEST AFRICA - Position South Africa as an affordable and welcoming destination with a variety of hyper-personalised experiences through creating and sharing credible first-hand information to drive consideration and visitation.

3) Global demand in priority markets by growing trips from and diversifying supply (through increased geo-spread, reduced seasonality) to contribute to growth and to support recovery (impact metric based on jobs and direct/total spend):

   a) Provide access to information on immersive experiences and rollout global communications campaign toolkits that address all consumer segments.

   b) Implement data-driven marketing targeted at scalable niches, supported by a consumer website that features destination information and a channels partners' website for real-time destination information.

1.3.5. PROGRAMME 3: RESOURCE CONSIDERATIONS

Programme 3: Leisure Tourism Marketing (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Economic classification:							
Compensation of employees	103,472	108,916	119 163	123,929	128,887	134,042	135,702
Goods and services	920,043	954,777	260 237	917,296	937,036	937,118	983,565
Depreciation	2,755	2,909	3 069	3,238	3,364	3,515	3,673
Total expenses	**1,026,270**	**1,066,602**	**382 469**	**1,044,463**	**1,069,287**	**1,074,675**	**1,122,940**
Staff complement (no.)	83						

1.4. PROGRAMME 4: BUSINESS EVENTS

1.4.1. PROGRAMME PURPOSE

The Business Events Programme is responsible to grow the nation's business events industry. The South African National Convention Bureau (SANCB) includes the following business units:

Business Unit	Aim/ Purpose
Business Development and Support Services	To generate qualified leads and inform targeted positioning of South Africa as a business events destination.
MICE Sales	To capacitate and enable a relevant and competitive business events destination.
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 Strategic Plan:

Institutional Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)
1. Increase the tourism sector's contribution to inclusive economic growth	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 2022/23 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	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
1. Increase the tourism sector's contribution to inclusive economic growth	1.6. B2B brand campaigns	1.6.1. Number of B2B brand campaigns implemented	N/A	N/A	New indicator	Global and domestic business events campaigns implemented	2 B2B campaigns implemented	2 B2B campaigns implemented	2 B2B campaigns implemented
	1.7. Bid support for international business events	1.7.1. Number of bid submissions	109 bid submissions	115 bid submissions	55 bid submissions	77 bid submissions	93 bid submissions	112 bid submissions	134 bid submissions
	1.8. Hosting of strategic platforms	1.8.1. Africa's Travel Indaba and Meetings Africa hosted	N/A	N/A	N/A	Hosting of Meetings Africa 2022 (No Africa's Travel Indaba in 2021)	Hosting of Africa's Travel Indaba 2022 and Meetings Africa 2023	Hosting of Africa's Travel Indaba 2023 and Meetings Africa 2024	Hosting of Africa's Travel Indaba 2024 and Meetings Africa 2025
	1.9. National business events hosted in VTSDs	1.9.1. Number of national business events hosted in VTSDs	N/A	N/A	New indicator	3 National business events to be piloted in VTSD	5 National business events to be piloted in VTSD	6 National business events hosted in VTSD	10 National business events hosted in VTSD

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

OUTPUT	OUTPUT INDICATORS	2022/23 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2022	Q2 Jul - Sep 2022	Q3 Oct - Dec 2022	Q4 Jan - Mar 2023
1.6. B2B brand campaigns	1.6.1. Number of B2B brand campaigns implemented	2 B2B campaigns implemented	Approved Domestic B2B Campaign Plan Approved Global B2B Campaign Plan	Implementation of Q2 milestones in Domestic B2B Campaign Implementation of Q2 milestones in Global B2B Campaign	Implementation of Q3 milestones in Domestic B2B Campaign Implementation of Q3 milestones in Global B2B Campaign	Implementation of Q4 milestones in Domestic B2B Campaign Implementation of Q4 milestones in Global B2B Campaign
1.7. Bid support for international business events	1.7.1. Number of bid submissions	93 bid submissions	33	30	15	15
1.8. Hosting of strategic platforms	1.8.1. Africa's Travel Indaba and Meetings Africa hosted	Hosting of Africa's Travel Indaba 2022 and Meetings Africa 2023	Post review - Meetings Africa 2021 Hosting of Africa's Travel Indaba 2022	Post Review - Africa's Travel Indaba 2022 Planning for Meetings Africa 2023 and Africa's Travel Indaba 2023	Planning for Meetings Africa 2023 and Africa's Travel Indaba 2023	Hosting of Meetings Africa 2023
1.9. National business events hosted in VTSDs	1.9.1. Number of national business events hosted in VTSDs	5 National business events to be piloted in VTSD	1 National business event hosted in VTSD	2 National business events hosted in VTSDs	1 National business event hosted in VTSD	1 National business event hosted in VTSD

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

This Programme is led by the National Conventions Bureau, which will actively seek to develop leads for future business events to ensure South Africa can bid for suitable events to be hosted.

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 be truly competitive on the international stage, is to focus on business development activities. Therefore, 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. Support is given for both the actual bidding process and in the form of bid enhancements, such as committing support services to the client during the staging of events.

South African Tourism aims to encourage local-based associations, federations, and societies to:

1) Rotate their national meetings/conferences across South Africa – spreading the economic impact of local meetings and conferences to villages, towns and small dorpies (VTSD).

2) Create bidding opportunities for VSTDs with the assistance of the provincial and city convention bureaus.

3) Assist VTSDs across South Africa to develop their meeting and conferencing infrastructure by bidding for National Association meetings and conferences.

4) Promote tourism experiences (pre- and post-tour packages for delegates and accompanying persons programme) in VTSD that can be marketed to delegates by local SMMEs, contributing to domestic tourism.

5) Incentivise the procurement of conferencing goods and services from local service providers in VTSD.

6) Create opportunities for communities based in VTSD to attend and participate in National Association meetings and conferences as delegates to export earnings for South Africa.

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 (Meetings, Incentives, Conferences and Trade Exhibitions) within the six focus sectors of the SANCB. This aligns to the JMIC Global Manifesto (2020) – an industry rationale for the use of Business Events as primary agents for post-pandemic economic recovery and renewal.

1.4.5. PROGRAMME 4: RESOURCE CONSIDERATIONS

Programme 4: Business Events (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Economic classification:							
Compensation of employees	11,994	12,833	12 833	13,347	13,880	14,436	15,013
Goods and Services	117,293	124,855	18 003	74,912	78,342	81,927	85,676
Total expenses	**129,287**	**137,689**	**30 836**	**88,259**	**92,222**	**96,363**	**100,689**
Staff complement (no.)	14						

1.5. PROGRAMME 5: TOURIST EXPERIENCE

1.5.1. PROGRAMME PURPOSE

The Tourist Experience Programme is responsible for ensuring the delivery of quality assured tourist/ visitor experiences, which are diverse, unique, and enriched.

The Tourist Experience Programme includes the following business units:

Business Unit	Aim/ 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, friendly and efficient services to tourists.
Brand Experience	To seek new offerings, products, and operators to package in exciting itineraries for the use of South African Tourism hosting needs, and to enable inclusive growth through itineraries that incorporate emerging/transformed businesses, encourage geographic spread across the country and address the misperceptions associated with seasonal travel.
Global Trade	To participate in the various local and international platforms to connect and promote South Africa as a lucrative destination to international

Business Unit	Aim/ Purpose
	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 Tourist Experience Programme delivers against the following outcome and five-year targets in the approved Strategic Plan:

Outcome	Outcome Indicator	Baseline (2019/20)	Five-Year Target (2024/25)
1. Increase the tourism sector's contribution to inclusive economic growth	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)*
	Net promoter score	91%	94%

The 2022/23 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	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
1. Increase the tourism sector's contribution to inclusive economic growth	1.10. Quality assured visitor services	1.10.1 Review of the grading model and TGCSA value proposition finalised	N/A	N/A	N/A	New indicator	Grading business model and TGCSA value proposition revised and implemented	Implementation of 2023/24 milestones in the business model roadmap	Implementation of 2024/25 milestones in the business model roadmap
		1.10.2. Number of graded establishments	5,147	5,173	-	4,707	5,355	5,462	5,625
		1.10.3. Welcome Programme implemented	N/A	N/A	N/A	New indicator	Welcome Programme reviewed and implemented / Development and implementation of Welcome Programme 2022/23 roadmap	Implementation of 2023/24 milestones in the Welcome Programme roadmap	Implementation of 2024/25 milestones in the Welcome Programme roadmap
	1.11. Rejuvenate supply and ensure sustainability	1.11.1. Implementation of Global Trade Re-imagined Programme	N/A	N/A	N/A	New indicator	Global Trade Re-imagined Programme implemented	Global Trade Re-imagined Programme implementation reviewed, and enhancements implemented	Global Trade Re-imagined Programme implementation reviewed, and enhancements implemented

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

OUTPUT	OUTPUT INDICATORS	2022/23 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2022	Q2 Jul - Sep 2022	Q3 Oct - Dec 2022	Q4 Jan - Mar 2023
1.10. Quality assured visitor services	1.10.1 Review of the grading model and TGCSA value proposition finalised	Grading business model and TGCSA value proposition revised and implemented	Review and audit of the current business model and TGCSA value proposition	Review and audit of the current business model and TGCSA value proposition	Consolidate and present a reviewed business model TGCSA value proposition for approval Development of implementation roadmap	Implementation of Q4 milestones in the business model implementation roadmap
	1.10.2. Number of graded establishments	5,355	1,339 quality assured products (achieved 25%)	2,678 quality assured products (achieved 50%)	4,016 of quality assured products (achieved 75%)	5,355 of quality assured products (achieved 100%)
	1.10.3. Welcome Programme implemented	Welcome Programme reviewed and implemented Development and implementation of Welcome Programme 2022/23 roadmap	Review and audit of current Welcome Programme	Consolidate and present reviewed Welcome Programme for approval Development of Welcome Programme roadmap	Implementation of Q3 milestones in the Welcome Programme roadmap	Implementation of Q4 milestones in the Welcome Programme roadmap
1.11. Rejuvenate supply and ensure sustainability	1.11.1. Implementation of Global Trade Re-imagined Programme	Global Trade Re-imagined Programme implemented	Review and consolidate framework for approval Development of implementation roadmap	Implementation of Q2 milestones in the Global Trade Re-imagined Programme roadmap	Implementation of Q3 milestones in the Global Trade Re-imagined Programme roadmap	Implementation of Q4 milestones in the Global Trade Re-imagined Programme roadmap

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

Within South African Tourism, tourist experience is addressed through the Quality Assurance, Visitor Experience, Brand Experience (Hosting) and Global Trade teams. These teams are committed to collectively and individually improving visitor experience for both international and domestic tourists through projects and partnerships.

The Quality Assurance function will continue its drive to grow the number of graded properties across South Africa, which will improve our overall perceptions as a quality destination that offers a wide variety of products and price points for tourists. Greater emphasis will be placed on assisting new entrants to be more sustainable and projects to support emerging sharing economy participants in their quality assurance journey are planned. For 2022/23 and beyond, a specific focus will be on reviewing the grading system to include emerging product and accommodation SMMEs.

Travel is about inclusive growth, not only for those that are in the tourism sector, but any South African that has business and experiences to share and knowledge that contributes positively to the consumer travel experience. 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 team 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 we are 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.

Global Trade will continue to participate in various local and intentional platforms to connect and promote South Africa as a lucrative destination to international airlines. The Global Trade team will also continue to participate in the provincial air access forums to ensure our insights into inbound global markets are made available to support efforts to secure new entrants. 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)	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Economic classification:							
Compensation of employees	16,297	17,209	17 209	18,069	18,973	19,732	20, 521
Goods and services	49,510	51,487	17 278	31,078	32,381	33,928	35,548
Total expenses	**65,807**	**68,695**	**34 487**	**49,147**	**51,354**	**53,659**	**56,069**
Staff complement (no.)	22						

2. CONSOLIDATED FINANCIAL PLAN AND 2022/23 MTEF BUDGET ESTIMATES

2.1. PROJECTED REVENUE FOR 2022/23 MTEF

Revenue (R'000)	2018/19 Audited	2019/20 Audited	2020/21 Audited	2021/22 Approved	2021/22 Special Adjustments	2021/22 Revised Budget	2022/23 Estimate	2023/24 Estimate	2024/25 Estimate
DT allocation	1,208,048	1,256,523	438,306	1,297,038	0	1,297,038	1,329,206	1,344,672	1,405,061
TOMSA levies	121,516	133,304	0	50,000	0	50,000	52,400	53,972	56,395
Indaba Meetings Africa & other exhibitions	58,999	110,189	680	33,498	0	33,498	33,757	34,372	35,927
Grading fees	21,739	23,164	0	12,239	0	12,239	12,826	13,210	13,804
Sundry revenue	37,611	22,498	0	24,847	0	24,847	27,389	28,608	29,881
TOTAL	1,447,913	1,545,678	438,986	1,417,622	0	1,417,622	1,455,578	1,474,834	1,541,068

2.2. PROJECTED EXPENDITURE FOR 2022/23 MTEF

	Name of the Programme	2018/19 Audited	2019/20 Audited	2020/21 Audited	2021/22			2022/23 Budget	2023/24 Budget	2024/25 Budget
					Approved Budget	Special Adjustments	Revised Budget			
		(R'000)	(R'000)	(R'000)	(R'000)	(R'000)	(R'000)	(R'000)	(R'000)	(R'000)
1	Corporate Support	132,271	152,190	111,344	140,205	0	154,768	158,094	161,717	168,979
2	Business Enablement	85,929	79,059	39,841	99,714	0	80,985	84,621	88,421	92,391
3	Leisure Tourism Marketing	1,075,625	948,603	382,469	1,120,444	0	1,044,463	1,069,287	1,074,675	1,122,940
4	Business Events	129,287	178,855	30,836	134,885	0	88,259	92,222	96,362	100,689
5	Tourist Experience	65,807	77,021	34,487	71,871	0	49,147	51,354	53,659	56,069
	TOTAL	1,488,919	1,435,727	598,977	1,567,119	1,567,119	1,417,622	1,455,578	1,474,834	1,541,068

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

The strategic risks reflected in the 2020-2025 Strategic Plan 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. - Tech hub/citizen-driven marketing UGC and itinerary engineering.
	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.
	Delay of vaccine rollout. Prolonged economic recovery.	Roll out of vaccination programme specifically for the tourism sector (jab for tourism campaign).
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.

Outcome	Key Risk	Risk Mitigation
	Cybersecurity risks - data protection and ICT security.	▪ Implementation of upgraded, consolidated, and enhanced IT security. ▪ Development of IT Security Framework, Network and Privilege, Access Management System, Endpoint Detection and Response 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.
	Lack of documented and formalised business processes.	▪ Streamlining, optimisation and digitisation of business processes. ▪ Regular review of the policy universe.
	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 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	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 (x100).
Means of Verification	▪ Quarterly Internal Audit Reports. ▪ Quarterly Audit Tracker detailing progress towards mitigation of findings.
Assumptions	The recommendations are actionable.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Annually.
Desired Performance	100% implementation is targeted.
Indicator Responsibility	Divisional Head: Internal Audit.

Indicator Title 2.1.2	Risk maturity level
Definition	To improve the risk maturity of the organisation over time through the effective management of risk and the implementation of the risk management plans.

Source of Data	- FY20/21 Risk Management Maturity Assessment Report. - FY22/23 Risk Management Maturity Assessment Report. - Quarterly Risk Management Reports on the implementation of the recommendations from the risk management maturity assessments.
Method of Calculation / Assessment	Assessment of progress on the implementation of the recommendations from the FY20/21 and FY22/23 Risk Management Maturity Assessment Reports.
Means of Verification	- FY20/21 Risk Management Maturity Assessment Report. - FY22/23 Risk Management Maturity Assessment Report. - Quarterly Risk Management Reports detailing progress on the implementation of the recommendations from the risk management maturity assessments.
Assumptions	The recommendations 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 2.2.1	Payment of compliant invoices within 30 days from date of receipt
Definition	Percentage of compliant invoices paid within 30 days to suppliers of goods and services, unless determined otherwise 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	Quarterly consolidated trial balance.
Assumptions	Payment of goods and services from government institutions and those with different payment terms will be excluded.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-to-date).
Reporting Cycle	Quarterly.
Desired Performance	100% performance is targeted.
Indicator Responsibility	Divisional Head: Chief Financial Officer.

Indicator Title 2.3.1	Automation of identified business processes
Definition	The indicator refers to the automation of South African Tourism business processes. South African Tourism targets a specific set of business processes for automation for the financial year.
Source of Data	▪ Updated and approved Business Automation Project Plan – reflecting what processes are to be automated and by which quarter. ▪ Quarterly DigiTech Reports reflecting progress on the automation of business processes. ▪ Project close-out report for each completed business process.
Method of Calculation / Assessment	Assessment of progress against Business Automation Project Plan in order to assess achievement of planned milestones.
Means of Verification	▪ Updated and approved Business Automation Project Plan – reflecting what processes, and by which quarter, are to be automated. ▪ Quarterly DigiTech Reports reflecting progress on the automation of business processes. ▪ Project close-out report for each completed business process, signed off by relevant business unit.
Assumptions	Funding will be available to implement the project.

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

Indicator Title 2.4.1	Staff engagement score
Definition	A measure of the engagement levels of staff each year. This is a measure of the culture of the organisation. The higher the engagement, the more satisfied staff tend to be.
Source of Data	- Annual staff engagement survey report. - Quarterly Human Capital Reports detailing progress towards the implementation of improvement actions from the prior year staff engagement assessment.
Method of Calculation / Assessment	All raw data (staff responses to the survey) is viewed and consolidated by the appointed service provider in order to ensure confidentiality of the responses received from the staff. A comprehensive report on the staff engagement survey is then provided to the organisation in Q4 each year, where themes are identified on different organisational and team levels. Assessment of progress on the implementation of the improvement actions from the prior year staff engagement assessment.
Means of Verification	- Annual Staff Engagement Survey Report available in Quarter 4 each year. - Quarterly progress reports on implementation of the improvement actions from the prior year's staff engagement assessment, tabled within 15 days of the end of the quarter.
Assumptions	Human Capital Strategy is implemented.
Disaggregation of Beneficiaries (where applicable)	Not applicable.

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

Indicator Title 2.4.2	Implementation of Employment Equity Plan: • Percentage of women in South African Tourism • Percentage of women in senior and top management positions • Percentage of people with disabilities employed • Maintain at least 60% Black people (Africans, Coloureds, and Indians) across all occupational levels	
Definition	• Percentage of women as a proportion of filled posts. • Percentage of women representation in the senior and top management positions as a proportion of the total number of filled senior and top management positions. • Percentage of representation of people with disabilities as a proportion of the total headcount. • Percentage of Black people (Africans, Coloureds, and Indians) representation across all occupational levels as a proportion of the total headcount.	
Source of Data	• Employment Equity Plan. • Employment Equity Report/s.	
Method of Calculation / Assessment	Percentage of women as a proportion of filled posts	Count of number of women employed divided by total number of filled posts, expressed as a percentage
	Percentage of women representation in the senior and top management positions as a proportion of the total number of filled senior and top management positions	Count of number of women employed in senior and top management positions divided by total number of filled senior and top management positions, expressed as a percentage
	Percentage of representation of people with disabilities as a	Count of number of people with disabilities employed divided by total

	proportion of the total headcount	number of filled posts, expressed as a percentage
	Percentage of Black people (Africans, Coloureds, and Indians) representation across all occupational levels as a proportion of the total headcount	Count of number of Black people (Africans, Coloureds, and Indians) employed across all occupational levels divided by the total headcount, expressed as a percentage
Means of Verification	- Employment Equity Plan submitted to the Department of Labour. - Quarterly Human Capital Reports detailing progress on Employment Equity targets tabled at Exco.	
Assumptions	South African Tourism can attract suitable talent to fill vacancies.	
Disaggregation of Beneficiaries (where applicable)	Women, Youth, People with Disabilities, and Black People (Africans, Coloureds, and Indians).	
Spatial Transformation (where applicable)	Not applicable.	
Calculation Type	Non-cumulative (each quarter is reported separately).	
Reporting Cycle	Quarterly.	
Desired Performance	Higher than targeted performance is desirable.	
Indicator Responsibility	Divisional Head: Chief Operations Officer.	

2. PROGRAMME 2: BUSINESS ENABLEMENT

Indicator Title 2.6.1	South African Tourism Corporate Brand Index
Definition	An index that calculates whether stakeholders see South African Tourism as a leader in the tourism industry in South Africa. By engaging with key stakeholders and addressing matters that stimulate tourism growth, South African Tourism will develop a reputation for being the tourism industry leader in South Africa.
Source of Data	- South African Tourism Corporate Brand Index Report. - Stakeholder Engagement Programme. - Quarterly Stakeholder Engagement Reports signed off by the CEO.

Method of Calculation / Assessment	Assessment of progress against the Stakeholder Engagement Programme detailed in the Quarterly Stakeholder Engagement Reports signed off by the CEO.
Means of Verification	- South African Tourism Corporate Brand Index Report available in Quarter 4 annually. - Stakeholder Engagement Programme available in Quarter 1 annually. - Quarterly Stakeholder Engagement Reports signed off by the CEO.
Assumptions	- The tourism sector is opened after the COVID-19 lockdown, and tourism sector recovery is possible. - Willingness of stakeholders to participate in the survey. - Adequate resources are available for stakeholder engagement.
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: Office of the CEO. Divisional Head: Acting Chief Strategy Officer.

Indicator Title 2.6.2	Integrated Digital and Analytics Operating Framework and annual roadmap implemented
Definition	The Integrated Digital and Analytics Operating Framework provides visualisation and interaction with data obtained from digital channels, dynamic reporting and data-driven digital marketing execution. This framework will provide the foundation for South African Tourism to champion the digital outlook for South African Tourism and the tourism industry.
Source of Data	- Integrated Digital and Analytics Operating Framework in Quarter 2. - Approved first year South African Tourism Implementation Roadmap in Quarter 2. - Quarterly DigiTech Reports reflecting progress against the first year Implementation Roadmap submitted to Exco at the end of Quarters 3 and Quarter 4.

Indicator Title 2.6.2	Integrated Digital and Analytics Operating Framework and annual roadmap implemented
Method of Calculation / Assessment	Verification that the Integrated Digital and Analytics Operating Framework and Year 1 Roadmap was developed and approved in Quarter 2. Assessment of progress against the Exco approved first year South African Tourism Implementation Roadmap as detailed in the Quarterly DigiTech Reports tabled in Quarters 3 and 4.
Means of Verification	- Exco approved integrated Digital and Analytics Operating Framework in Quarter 2. - Exco approved first year South African Tourism Implementation Roadmap in Quarter 2. - Quarterly DigiTech Reports reflecting progress against the first year Implementation Roadmap submitted to Exco at the end of Quarters 3 and Quarter 4. - Exco approved second year South African Tourism Implementation Roadmap in Quarter 4.
Assumptions	- Support by business units for implementation of the Integrated Digital and Analytics Operating Framework. - Timely renewals of data and analytics licences and subscriptions. - Sufficient budget allocation.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-to-date).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per defined targets.
Indicator Responsibility	Divisional Head: Digitech. Divisional Head: Acting Chief Strategy 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. The campaign will focus on leisure, business and corporate tourism.
Source of Data	- Annual Global Tourism Brand Campaign Plan. - Quarterly Brand and Marketing Reports detailing progress in implementing the Global Tourism Brand Campaign Plan.
Method of Calculation / Assessment	- Verify that the FY2022/23 Global Tourism Brand Campaign Plan is developed and approved by Exco in Quarter 1. - Assess progress towards implementation of the FY22/23 Global Tourism Brand Campaign Plan on a quarterly basis. - Verify that the FY2023/24 Global Tourism Brand Campaign Plan is developed and approved by Exco in Quarter 4.
Means of Verification	- FY2022/23 Global Tourism Brand Campaign Plan. - Quarterly Brand and Marketing Reports detailing progress towards the implementation of the FY2022/23 Global Tourism Brand Campaign Plan, tabled within 15 days of the end of each quarter. - FY2023/24 Global Tourism Brand Campaign Plan.
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 COVID-19.
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 approved plan is targeted.
Indicator Responsibility	Divisional Head: Chief Marketing Officer.

Indicator Title 1.2.1	Integrated Destination Brand and Marketing Strategy implemented
Definition	A three-year integrated, organisation-wide, Destination Brand and Marketing Strategy is developed and implemented through an annual implementation roadmap. The integrated strategy will address both Business to Consumer (Leisure) and Business to Business (MICE) requirements, and will include: ▪ A Global Public Relations (PR) and Communications Plan (inclusive of Internal Communications Strategy and Spokespersons Strategy). ▪ A Creative Strategy. ▪ A Global Marketing Plan.

Source of Data	▪ Three-year (2022/23-2024/25) Integrated Destination Brand and Marketing Strategy, including:
	
	   o Global PR and Communications Plan (inclusive of Internal Communications Strategy and Spokespersons Strategy).
	
	   o Creative Strategy.
	
	   o Global Marketing Plan.
	
	▪ Annual Implementation Roadmap.

Method of Calculation / Assessment	▪ Verify that the three-year Integrated Destination Brand and Marketing Strategy is developed and approved by Exco in Quarter 1. ▪ Verify that the that the Year 1 Roadmap is developed and approved by Exco in Quarter 2. ▪ Assessment of performance against the year 1 (2022/23) Implementation Roadmap, as reported in the Quarterly Brand and Marketing Reports in Quarters 3 and 4.
Means of Verification	▪ Exco approved three-year Integrated Destination Brand and Marketing Strategy in Quarter 1. ▪ Exco approved Annual Implementation Roadmap in Quarter 2. ▪ Quarterly Brand and Marketing Reports detailing progress in implementation of the year 1 (2022/23) Implementation Roadmap, tabled within 15 days of the end of each quarter.
Assumptions	Brand and Marketing are responsible for the whole organisation's strategy.
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 approved plan and roadmap is targeted.
Indicator Responsibility	Divisional Head: Chief Marketing Officer.

Indicator Title 1.3.1.	Number of Global Brand Activations implemented
Definition	Brand activation refers to an interactive, multi-dimensional and multi-medium activity that engages audiences and build exceptional consumer experiences.
Source of Data	- Project plan for each Global Brand Activation, signed off by the Chief Marketing Officer (CMO). - Global Brand Activation Close-Out Report signed by the CMO within 30 days after the end of the activation programme.
Method of Calculation / Assessment	Simple count of the number of Global Brand Activations implemented.
Means of Verification	- Project plan for each Global Brand Activation, signed off by the CMO. - Close-out report for each Global Brand Activation signed off by the CMO within 30 days after the end of the activation programme.
Assumptions	- COVID-19 compliance and ability to execute physical activations. - No restrictions or business interruption from COVID-19.
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 Marketing Officer.

Indicator Title 1.4.1	Elements of the 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 2021/22, will be further developed and then implemented in stages during 2022/23. The Global Advocacy Programme has the following elements: ▪ Travel barrier removal communications roadmap for each source market. ▪ Amplification of communication around strategic events. ▪ "Always On" content management roadmap.
Source of Data	▪ Travel barrier removal communications roadmap for each source market. ▪ Strategic events communications calendar. ▪ "Always On" Content Management Strategy and Roadmap. ▪ Quarterly Brand and Marketing Reports detailing progress on the Global Advocacy Programme.
Method of Calculation / Assessment	▪ Verify that the travel barrier removal communications roadmap for each source market is approved by Exco on a quarterly basis and thereafter implemented. ▪ Verify that the quarterly strategic events communications calendar is approved by Exco on a quarterly basis and thereafter implemented. ▪ Verify that the "Always On" Content Management Strategy and Roadmap is approved by Exco on a quarterly basis and thereafter implemented as reported through Quarterly Brand and Marketing Reports detailing progress on the Global Advocacy Programme.
Means of Verification	▪ Travel barrier removal communications roadmap for each source market. ▪ Strategic events communications calendar per quarter. ▪ "Always On" Content Management Strategy and Roadmap. ▪ Quarterly Brand and Marketing Reports detailing progress on the Global Advocacy Programme.
Assumptions	▪ Procurement of brand sentiment/finance index, media, and social media monitoring tools. ▪ No restrictions or business interruption from COVID-19.
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 Marketing Officer.

Indicator Title 1.5.1	Number of domestic campaigns delivered
Definition	The development and implementation of marketing campaigns targeting the domestic market.
Source of Data	**Campaign Plan:** A clear campaign plan with predetermined SMART goals that are aligned to the South African Tourism FY22/23 APP and annual and divisional operational plans. The campaign plan will have predetermined KPIs (directly related to the goals), clearly indicating the measurement to be used. **Delivered Campaign:** A detailed Campaign Close-out Report, covering SMART goals, campaign evaluation, measurements, insights and learnings.
Method of Calculation / Assessment	Simple count of the number of campaigns delivered.
Means of Verification	**Campaign Plan:** Campaign Plan each quarter, approved by the COO. **Delivered Campaign:** Campaign Close-out Report signed off by the COO before the end of the reporting quarter.
Assumptions	- Sufficient budget. - Timeous content that can be effectively localised. - Working tech.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.

Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	3 domestic campaigns per annum.
Indicator Responsibility	Divisional Head: Chief Operations Officer.

Indicator Title 1.5.2	Number of regional (Africa) campaigns delivered
Definition	The development and implementation of marketing campaigns targeting the regional (Africa) markets.
Source of Data	• **Campaign Plan:** A clear campaign plan with predetermined SMART goals that are aligned to the South African Tourism FY22/23 APP and annual and divisional operational plans. The campaign plan will have predetermined KPIs (directly related to the goals), clearly indicating the measurement to be used. • **Delivered Campaign:** A detailed Campaign Close-out Report, covering SMART goals, campaign evaluation, measurements, insights and learnings.
Method of Calculation / Assessment	Simple count of the number of campaigns delivered.
Means of Verification	• **Campaign Plan**: Campaign Plan, approved by the COO. • **Delivered Campaign**: Campaign Close-out Report signed off by the COO within 60 days after the end of the campaign.
Assumptions	• Sufficient budget. • Timeous content that can be effectively localised. • Working tech.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Annually.

Desired Performance	4 regional campaigns per annum.
Indicator Responsibility	Divisional Head: Chief Operations Officer.

Indicator Title 1.5.3	Number of International (overseas) campaigns delivered
Definition	The development and implementation of marketing campaigns targeting the international (overseas) markets.
Source of Data	**Campaign Plan:** A clear campaign plan with predetermined SMART goals that are aligned to the South African Tourism FY22/23 APP and annual and divisional operational plans. The campaign plan will have predetermined KPIs (directly related to the goals), clearly indicating the measurement to be used. **Delivered Campaign:** A detailed Campaign Close-out Report, covering SMART goals, campaign evaluation, measurements, insights and learnings.
Method of Calculation / Assessment	Simple count of the number of campaigns delivered.
Means of Verification	**Campaign Plan**: Campaign Plan, approved by the COO. **Delivered Campaign**: Campaign Close-out Report by the COO within 60 days after the end of the campaign.
Assumptions	- Sufficient budget. - Timeous content that can be effectively localised. - Working tech.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Annually.
Desired Performance	15 international campaigns per annum.
Indicator Responsibility	Divisional Head: Chief Operations Officer.

4. PROGRAMME 4: BUSINESS EVENTS

Indicator Title 1.6.1	Number of B2B brand campaigns implemented
Definition	The development and implementation of business to business (B2B) domestic and global marketing campaigns, focused on targeted economic sectors, that will be flighted.
Source of Data	▪ **Campaign Plan:** A clear campaign plan with predetermined SMART goals that are aligned to the South African Tourism FY22/23 APP and annual and divisional operational plans. The campaign plan will have predetermined KPIs (directly related to the goals), clearly indicating the measurement to be used. ▪ **Delivered Campaign:** A detailed Campaign Close-out Report, covering SMART goals, campaign evaluation, measurements, insights and learnings.
Method of Calculation / Assessment	Simple count of the number of campaigns delivered..
Means of Verification	▪ **Campaign Plans**: Domestic Campaign Plan and Global Campaign Plan approved by the Executive in Q1 each year. ▪ **Delivered Campaign**: Campaign Close-out Report signed off by the Executive within 30 days after the end of the campaign. ▪ Quarterly SANCB Reports detailing progress on the B2B brand campaigns, signed off by the Executive Manager, within 15 days of the end of each 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)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired Performance	Implementation as per defined targets.

Indicator Responsibility	Divisional Head: South Africa National Convention Bureau.

Indicator Title 1.7.1	Number of bid submissions
Definition	Tracking of bid submissions for international and regional business events (meetings, incentives, conventions and exhibitions) 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	Excel spreadsheet listing the bids supported.
Method of Calculation / Assessment	Simple count of the number of bids submitted.
Means of Verification	Signed bid support letters.
Assumptions	▪ Each bid submission starts with a lead sourcing process to identify and qualify a potential piece of business. The lead nurturing process can take up to 2 - 3 years to convert a lead into a bid submission. ▪ Each bid submission requires a coordinated effort including various value chain stakeholders (association, venue, PCO etc.) to develop a bid strategy and document that responds to the event owners hosting requirements.
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: South Africa National Convention Bureau.

Indicator Title 1.8.1	Africa's Travel Indaba and Meetings Africa hosted
Definition	Hosting of Meetings Africa and Africa's Travel Indaba successfully, as strategic business events, in order to benefit the tourism industry.

Source of Data	- Meetings Africa Project Plan. - Africa's Travel Indaba Project Plan. - On-line Diary System for each event. - Post-show report for each event.
Method of Calculation / Assessment	Simple count of the number of events.
Means of Verification	- Meetings Africa Project Plan. - Africa's Travel Indaba Project Plan. - On-line Diary System for each event. - Post-show report for each event, signed off by the Executive Manager, within 60 days after the end of the event.
Assumptions	Africa's Travel Indaba and Meetings Africa are hosted and are not cancelled.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Non-cumulative.
Reporting Cycle	Bi-annually: - ATI is hosted in May and reported in Q2 annually. - MA is hosted in February of the prior year and reported in Q1 annually.
Desired Performance	Implementation as per defined targets.
Indicator Responsibility	Divisional Head: South Africa National Convention Bureau.

Indicator Title 1.9.1	Number of national business events hosted in VTSDs
Definition	The number of National Association business events supported within South Africa and hosted in villages, towns and small dorpies (VTSD).
Source of Data	List of national business events from South African Tourism.
Method of Calculation / Assessment	Simple count of the number of national business events hosted in VTSDs.

Means of Verification	Post-event report, signed off by the Executive Manager, within 60 days after the end of the event.
Assumptions	Availability of national events to be supported and COVID-19 regulations related to gatherings.
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.

5. PROGRAMME 5: TOURIST EXPERIENCE

Indicator Title 1.10.1	Review of the grading model and TGCSA value proposition finalised
Definition	Review of the grading system and the quality assurance framework and approach, and to broaden the opportunities for the inclusion of emerging products, experiences and accommodation. This includes reviewing the Tourism Grading Council of South Africa (TGCSA) value proposition and business model.
Source of Data	▪ Revised grading model and TGCSA value proposition. ▪ Grading Model Implementation Roadmap. ▪ Quarterly TE Report detailing progress against the Implementation Roadmap.
Method of Calculation / Assessment	▪ Verify that the reviewed grading model and TGCSA value proposition are tabled to Exco for approval in Q3 2022/23. ▪ Assess performance against the Implementation Roadmap commencing in Quarter 4.
Means of Verification	▪ Exco approved revised grading model and TGCSA value proposition in Quarter 3. ▪ Exco approved Annual Implementation Roadmap in Quarter 4.

	▪ Quarterly TE Report detailing progress against the Implementation Roadmap in Quarter 4, tabled within 15 days of the end of the quarter.

Assumptions	▪ Resources to meet operational needs to deliver the value proposition/mandate:
	   o Budget
	   o Systems
	   o Structure
	   o Suppliers (grading assessors)
	▪ Business integration (TGCSA, Global Product, Lilizela Tourism Awards, Brand Experience).

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 approved plan and roadmap is targeted.
Indicator Responsibility	Divisional Head: Acting Chief Quality Assurance Officer.

Indicator Title 1.10.2	**Number of graded establishments**
Definition	The number of tourism establishments that join the TGCSA Star Grading Membership Scheme and get graded.
Source of Data	QiT System
Method of Calculation / Assessment	Simple count of the number of valid members on the QiT System.
Means of Verification	QiT system reports.
Assumptions	Establishments find value in grading, and the economy does not lead to establishments shutting down. A number of establishments may have shut down due to the COVID-19 pandemic.

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: Acting Chief Quality Assurance Officer.

Indicator Title 1.10.3	Welcome Programme implemented
Definition	The Welcome Programme, including the toolkits, approach to capacitating industry, campaigns, training and upskilling approaches, needs to be reviewed and updated, for relevance in the COVID-19 environment and beyond.
Source of Data	▪ Reviewed Welcome Programme Model and Framework. ▪ Welcome Programme Roadmap. ▪ Quarterly TE Report detailing progress in Quarters 3 and 4.
Method of Calculation / Assessment	▪ Verify that the reviewed Welcome Programme Model and Framework is approved by Exco in Quarter 2. ▪ Assess performance against the Welcome Programme Roadmap in Quarters 3 and 4.
Means of Verification	▪ Exco approved reviewed Welcome Programme Model and Framework in Quarter 2. ▪ Exco approved Welcome Programme Roadmap in Quarter 2. ▪ Quarterly TE Report detailing progress against the Welcome Programme Roadmap in Quarters 3 and 4, tabled within 15 days of the end of each quarter.
Assumptions	▪ COVID-19 compliance and ability to execute physical activations. ▪ No restrictions or business interruption from COVID-19. ▪ Correct content and insights for effective training modules

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 approved plan and roadmap is targeted.
Indicator Responsibility	Divisional Head: Acting Chief Quality Assurance Officer.

Indicator Title 1.11.1	Implementation of Global Trade Re-imagined Programme
Definition	The Global Trade work 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 the trade and channel to contribute to our growth and support our recovery plan.
Source of Data	▪ Reviewed framework for the Global Trade Re-imagined Programme. ▪ Global Trade Re-imagined Programme Roadmap. ▪ Quarterly TE Reports detailing progress against the Global Trade Re-imagined Programme Roadmap in Quarters 2, 3 and 4.
Method of Calculation / Assessment	▪ Verify that the reviewed framework for the Global Trade Re-imagined Programme is approved by Exco in Q1 2022/23. ▪ Assess performance against the Global Trade Re-imagined Programme Roadmap in Quarters 2, 3 and 4.
Means of Verification	▪ Exco approved reviewed framework for the Global Trade Re-imagined Programme in Quarter 1. ▪ Exco approved Global Trade Re-imagined Programme Roadmap in Quarter 1. ▪ Quarterly TE Reports detailing progress against the Global Trade Re-imagined Programme Roadmap in Quarters 2, 3 and 4, tabled within 15 days after the end of the quarter.
Assumptions	▪ Sufficient budget. ▪ Accurate content that can be used in the trade training platform.

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 approved plan and roadmap is targeted.
Indicator Responsibility	Divisional Head: Visitor Experience.

ANNEXURES TO THE ANNUAL PERFORMANCE PLAN

ANNEXURE A: AMENDMENTS TO THE STRATEGIC PLAN

The process to develop this 2022/23 Annual Performance Plan began with reviewing and confirming the amendments made to the approved 2020-2025 Strategic Plan, included as Annexure A to the 2021/22 Annual Performance Plan.

This included reflecting on the experience and learnings from the prolonged disruption arising from the COVID-19 pandemic and the related lockdowns.

The review confirmed that there are no further material changes to the strategic plan to those reflected in Annexure A of the 2021/22 Annual Performance Plan. That Annexure remains relevant for this 2022/23 financial year Annual Performance Plan.

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.