



SOUTH AFRICAN TOURISM

SOUTH AFRICAN TOURISM

ANNUAL PERFORMANCE PLAN

for

2021/22

To obtain additional copies of this document please contact:

SOUTH AFRICAN TOURISM

Office of the CEO

Bojanala House, 90 Protea Road

Chislehurst

Johannesburg, 2196

South Africa

Tel: +27 (0)11 895 3000

Email: travel@southafrica.net

Web: www.southafrica.net

EXECUTIVE AUTHORITY STATEMENT



Honourable Mmamoloko Kubayi-Ngubane, MP
Minister for Tourism

In the financial year 2020/21, the tourism sector operated mostly under travel restrictions imposed in varying degrees in various countries of the world to curb the spread of the Covid-19 pandemic. The evolution of the pandemic has seen the virus spread fluctuating between multiple peaks and troughs resulting in the tightening and easing of travel restrictions over time. According to the United Nations World Tourism Organisation (UNWTO) report on restrictions, as of 1 February 2021, 32% of all destinations worldwide are completely closed for international tourism and 34% are partially closed, while 2% have lifted all COVID-19 related travel restrictions.

As a result of these travel restrictions the UNWTO expects international arrivals to have declined by 70% to 75% for the whole of 2020. In this case, global tourism will have returned to levels of 30 years ago, with 1 billion fewer arrivals and a loss of some US\$ 1.1 trillion in international tourism receipts. This drop in tourism could result in an economic loss of US\$ 2 trillion in world GDP.

Locally, the sector has not been spared from the devastation of the pandemic. According to Statistics South Africa, for December 2020 foreign arrivals decreased by 82.1%, from 1.5 million arrivals in December 2019 to 279,539 in December 2020. It was also reported that while 163,335 tourists came from Europe in December 2019, only 26,880 arrived from Europe in December 2020. Regionally, 772,945 visitors came from other African countries in December 2019, dropping to 161,358 in December last year. From March until December 2020, because of the travel restrictions, there was a significant drop of inbound international travellers which translates into a huge loss of tourism revenue for the financial year 2020/21.

The focus of the financial year 2021/2022, will be on the implementation of the Tourism Recovery Plan (TRP) in alignment with our country's Economic Reconstruction and Recovery Plan. The TRP outlines a set of strategic interventions together with enablers which, if implemented, will ensure business continuity and restore growth in the tourism sector. SAT will be central in driving

interventions such as the stimulation of domestic demand through targeted initiatives and campaigns and in the execution of a global marketing programme to reignite international demand.

Aggressive tourism marketing domestically, regionally and internationally is an integral part of the TRP and SAT will elaborate annual marketing programmes on its annual performance plans for the next three years. This will allow our country to communicate with our source markets to keep them updated on our management of the pandemic, progress in rolling out the vaccine and measures we are taking to protect tourists and all those who are participants in the tourism sector.

In early 2020, SA Tourism initiated a revision of its Marketing and Investment Framework using 2019 as the base year to review the portfolio. The framework made use of 33 variables related to performance, outlook, and South Africa's ability to win in the market, return on past investments, and other criteria. In total, 24 markets / countries are identified for prioritisation, 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. This framework will be utilised in the implementation of our marketing programmes in alignment with the vaccination programme and the travel restrictions of each of the identified countries.

As regards domestic tourism our country will continue to implement the Risk Adjusted Strategy to manage the pandemic. Before the second wave of the pandemic hit our country in December 2020, domestic tourism was rapidly rising which a rapid recovery of subsectors such as restaurants, accommodation and other open-air attractions. As the restrictions were tightened to respond to the second wave, domestic tourism was dampened. Indeed, the strategies that SAT will adopt to promote domestic tourism will be sensitive to the reality of stops and starts due to the fluctuation of the spread of the virus until such a time that our country can achieve herd immunity. The recovery will be protracted however the tourism sector has demonstrated the resilience and ingenuity to survive the uncertainty of the pandemic.

Technological innovation will play a central role in the delivery of services in the tourism sector and SAT will be championing the adoption and the usage of these technologies. Reorienting our destination to attract international and domestic digital nomads is a fundamental shift that the sector will need to embrace as increasingly businesses and professionals are opting to work remotely. SAT will work closely with the sector to ensure our marketing programmes are responsive to this change and many other changes that are happening in the sector.

As their term comes to an end this financial year, I would like to appreciate the work done by the South African Tourism Board in steering the organisation for the past three years including the past financial year which was overshadowed by the Covid-19 pandemic. I would also like to acknowledge the dedication and hard work of the South African Tourism executive team and the entire staff under the leadership of the Chief Executive Officer as we look forward to re-igniting demand, rejuvenating the supply side of the market and strengthening capabilities for tourism sector to continue thrive and grow


Honourable Mmamotoko Kubayi-Ngubane, MP

Minister for Tourism

ACCOUNTING AUTHORITY STATEMENT



Mr. Siyabonga Dube

Chairperson of the Board, SOUTH AFRICAN TOURISM

I am pleased to present South African Tourism's Annual Performance Plan for the financial year 2021/22.

The Coronavirus pandemic has changed the world as we know it. It has necessitated us, as an organisation, and the world at large, to press the reset button and observe the consistent changes around us, to ensure we remain relevant and fit for purpose.

This Annual Performance Plan has been developed with the current world order in mind and aims to propel South African Tourism forward, as we work towards recovery and fulfilling our mandate.

Although COVID-19 has set the global tourism sector back, I know that we are a resilient sector, and we will recover from this pandemic. To this end, a Tourism Sector Recovery Plan has been collaboratively developed with key industry stakeholders, as a blueprint for the sector's recovery. As per the Plan, the strategic objectives for us as a sector protecting and rejuvenating supply, reigniting demand and strengthening enabling capability for long term sustainability.

As we work towards recovery, we will continue to focus on improving operational efficiencies and remaining visible, whilst creating marketing campaigns that are geared to contribute to building the stature of the destination brand, so that South Africa becomes a destination of choice as travel restrictions are being lifted around the world.

For the 2021/22 fiscal year, South African Tourism is confident that it will enhance its capability and capacity and continue to strengthen its governance systems and outcomes-based reporting. The Board affirms its commitment to continue to provide the necessary strategic guidance, to transform South African Tourism into an entity that is optimally positioned to deliver on its mandate, during and post the pandemic.

As the South African Tourism Board, we would like to acknowledge the continuous support of the Portfolio Committee and the Minister of Tourism, Ms. Mmamoloko Kubayi-Ngubane, in guiding the organisation towards realising its key objectives. A long recovery journey lies ahead of us, but I am confident that we have the ability and the requisite skills to see to it that we achieve the priorities we have set for ourselves as we execute our mandate.

The Board fully endorses the 2021/22 Annual Performance Plan as the guiding document for the work and focus of South African Tourism for the fiscal period.



Mr. Siyabonga Dube

Board Chairperson

ACCOUNTING OFFICER STATEMENT



Mr Sisa Ntshona

Chief Executive Officer, SOUTH AFRICAN TOURISM

South African Tourism is pleased to present the 2021/22 Annual Performance Plan (APP).

This Annual Performance Plan has been developed taking into consideration the current global context, as well as the new world order presented by the Coronavirus pandemic. COVID-19 has had a devastating impact on the world at large, including the global and local tourism sector, with many tourism businesses being unable to survive the adverse impact of this pandemic.

According to the United Nations World Tourism Organisation (UNWTO), as a result of the global travel restrictions, international arrivals decreased by an unprecedented 95% during the second quarter of 2020 and, although destinations are lifting travel restrictions, international travel remains sluggish and this is likely to be the case for the foreseeable future.

The recovery of tourism, globally, will be long and arduous and the uncertain environment means that the outlook is largely indeterminate. What has become evident about the recovery is that it will be led by domestic tourism before international tourism, although the possibility of a third wave locally places even this at risk. In aid of the recovery, the Tourism Sector Recovery Plan has been developed. The plan includes the following strategic interventions:

- 1) Implement biosecurity norms and standards across the value chain to enable safe travel and rebuild traveller confidence.
- 2) Stimulate domestic demand through targeted initiatives and campaigns.
- 3) Strengthen the supply-side through resource mobilisation and investment facilitation.
- 4) Support for the Protection of Core Tourism Infrastructure and Assets.

- 5) Execute a global Marketing programme to reignite International Demand.
- 6) Tourism Regional Integration, and
- 7) Review the tourism policy to provide enhanced support for sector growth and development.

Aligned to its role reflected in the Tourism Sector Recovery Plan, SA Tourism has prioritised 5 themes, which form the key focus areas of SA Tourism's APP for the next financial year:

- 1) Domestic, regional and select international marketing;
- 2) Market entry facilitation and sector transformation;
- 3) Biosecurity protocols and quality assurance;
- 4) Industry/Government recovery partnerships; and
- 5) Business optimisation.

Although the sector is faced with a myriad of challenges, I am confident that we will recover; and this Annual Performance Plan clearly outlines how we aim to navigate our way through this unstable climate.

Domestic tourism will play a leading role in our recovery, as travellers will use their surroundings as a means to, once again, familiarise themselves with travel, prior to hopping on a long-haul international flight. It is for this reason that we will place significant effort into reigniting domestic demand and encouraging South Africans to travel and enjoy their country.

As a sector leader, South African Tourism will continue to work with the various tourism product owners and SMMEs, to ensure we can assist each other as we rebuild our destination brand offering.

We remain cognisant of the pressure that COVID-19 has placed on the South African economy, and we are committed to ensuring we are prudent in all that we do, whilst delivering on our mandate.

For the 2021/22 fiscus, we will improve the organisation's operational efficiency by automating critical business enabling processes and build the organisation's capability to deliver on its mandate in the most efficient and cost-effective manner possible. Internally, South African Tourism is in the process of making the exciting shift to become more consumer-centric, purpose-driven, collaborative, data-driven, agile and efficient.

Our strategy aims to help the tourism sector and position South African Tourism to achieve its targets through the recovery. I am confident that we will achieve everything we have set out in this Annual Performance Plan, with the continuous support and resolute leadership of the Minister and the Board.

I would like to affirm my commitment and that of the South African Tourism team to work to the best of our ability to implement the Annual Performance Plan. I commit to leading the organisation and to ensure that we execute against all of our priorities contained in this key planning document.



Mr. Sisa Ntshona

Chief Executive Officer (Accounting Officer)

OFFICIAL SIGN-OFF

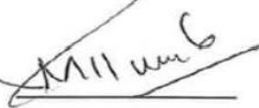
It is hereby certified that this 2021/22 Annual Performance Plan:

- 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 2021/22 financial year.



Ms. Amanda Kotze-Nhlapo

CHIEF CONVENTION
BUREAU OFFICER



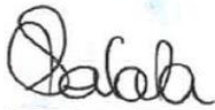
Mr. Themba Khumalo

CHIEF MARKETING
OFFICER



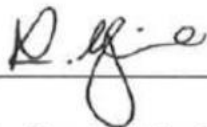
Ms. Amanda Kotze-Nhlapo

CHIEF QUALITY
ASSURANCE
OFFICER (ACTING)



Ms. Sthembiso Dlamini

CHIEF OPERATIONS
OFFICER



Ms. Nombulelo Guliwe

CHIEF FINANCIAL OFFICER

19/03/2021

Date



Ms. Yolanda Kona

19/03/2021

Date

HEAD: STRATEGIC PLANNING, EVALUATION & PROGRAMME MANAGEMENT




Mr. Sisa Ntshona

19/03/2021

CHIEF EXECUTIVE OFFICER (ACCOUNTING OFFICER)

Date

APPROVED BY:



19/03/2021

Date

Mr. Siyabonga Dube

CHAIRPERSON OF THE BOARD (ACCOUNTING AUTHORITY)



Honourable Mmamoloko Kubayi-Ngubane, MP

22/03/2021

Date

MINISTER FOR TOURISM (EXECUTIVE AUTHORITY)

ABBREVIATIONS AND ACRONYMS

AG/AGSA	Auditor-General of South Africa
AI	Analytics and Insights
APP	Annual Performance Plan
B2B	Business to Business
B2C	Business to Consumer
B-BBEE	Broad-Based Black Economic Empowerment
BEE	Black Economic Empowerment
CEO	Chief Executive Officer
CFO	Chief Financial Officer
CMO	Chief Marketing Officer
COO	Chief Operations Officer
COVID-19	Corona Virus Disease, 2019
DMO	Destination Marketing Organisation
DT	Department of Tourism
E&SD	Enterprise and Supplier Development
EE	Employment Equity
ERRP	Economic Reconstruction and Recovery Plan
Exco	Executive Management Committee
FY	Financial Year
GDP	Gross Domestic Product
GMA	Global Marketing Association
IATA	International Air Transport Association
ICT	Information and Communication Technology
IMF	International Monetary Fund
LGBTQI	Lesbian, Gay, Bisexual, Transgender/Transsexual, Queer/Questioning and Intersex
LTA	Local Tourism Authority
MICE	Meetings, Incentives, Conferences and Trade Exhibitions
MIF	Marketing and Investment Framework
MOU	Memorandum of Understanding
MTEF	Medium-Term Expenditure Framework

MTSF	Medium-Term Strategic Framework
NCB	National Conventions Bureau
NDP	National Development Plan
NPS	Net Promoter Score
OLA	Operational Service Level Agreement
PFMA	Public Finance Management Act
PTA	Provincial Tourism Authority
PWD	People with Disability
RPK	Revenue Passenger Kilometres
SA	South Africa
SA Tourism	South African Tourism
SANCB	South African National Convention Bureau
SAPO	South Africa Product Owner
SLA	Service Level Agreement
SMME	Small, Medium, and Micro Enterprise
SONA	State of the Nation Address
StatsSA	Statistics South Africa
TDM	Tourism Decision Metrics
TE	Tourism Execution Programme
TGCSA	Tourism Grading Council of South Africa
TOMSA	Tourism Marketing South Africa
UNWTO	United Nations World Tourism Organisation
US/USA	United States of America
VTSD	Villages, Towns and Small Dorpies
WEO	World Economic Outlook
ZAR	South African Rands

TABLE OF CONTENTS

EXECUTIVE AUTHORITY STATEMENT	3
ACCOUNTING AUTHORITY STATEMENT	5
ACCOUNTING OFFICER STATEMENT	7
OFFICIAL SIGN-OFF	10
ABBREVIATIONS AND ACRONYMS	12
PART A: OUR MANDATE	18
1. UPDATES TO RELEVANT LEGISLATIVE AND POLICY MANDATES	18
1.1. Updated Legislative Mandates	18
1.2. Updated Policy Mandates.....	18
2. UPDATES TO INSTITUTIONAL POLICIES AND STRATEGIES	19
2.1. Economic Reconstruction and Recovery Plan, 2020	18
2.2. Tourism Sector Recovery Plan, 2021	20
2.3. SA Tourism Marketing and Investment Framework (MIF)	23
3. UPDATES TO RELEVANT COURT RULINGS	25
PART B: OUR STRATEGIC FOCUS.....	26
1. UPDATED SITUATIONAL ANALYSIS.....	27
1.1. External Environment Analysis.....	27
1.1.1. <i>The SA Tourism Road to Recovery</i>	31
1.2. Internal Environment Analysis	35
1.3. Priorities Informing 2021/22 Planning	35
PART C: MEASURING OUR PERFORMANCE.....	41
1. INSTITUTIONAL PROGRAMME PERFORMANCE INFORMATION.....	41
1.1. Programme 1: Corporate Support.....	42
1.1.1. <i>Programme Purpose</i>	42
1.1.2. <i>Programme 1: Outcomes, Outputs, Output Indicators and Targets</i>	43
1.1.3. <i>Programme 1: Output Indicators: Annual and Quarterly Targets</i>	45
1.1.4. <i>Programme 1: Explanation of Planned Performance over the Medium-Term Period</i>	47
1.1.5. <i>Programme 1: Resource Considerations</i>	47
1.2. Programme 2: Business Enablement	48

1.2.1.	<i>Programme Purpose</i>	48
1.2.2.	<i>Programme 2: Outcomes, Outputs, Output Indicators and Targets</i>	49
1.2.3.	<i>Programme 2: Output Indicators: Annual and Quarterly Targets</i>	50
1.2.4.	<i>Programme 2: Explanation of Planned Performance over the Medium-Term Period</i>	51
1.2.5.	<i>Programme 2: Resource Considerations</i>	51
1.3.	<i>Programme 3: Leisure Tourism Marketing</i>	52
1.3.1.	<i>Programme Purpose</i>	52
1.3.2.	<i>Programme 3: Outcomes, Outputs, Output Indicators and Targets</i>	54
1.3.3.	<i>Programme 3: Output Indicators: Annual and Quarterly Targets</i>	56
1.3.4.	<i>Programme 3: Explanation of Planned Performance over the Medium-Term Period</i>	58
1.3.5.	<i>Programme 3: Resource Considerations</i>	59
1.4.	<i>Programme 4: Business Events</i>	59
1.4.1.	<i>Programme Purpose</i>	59
1.4.2.	<i>Programme 4: Outcomes, Outputs, Output Indicators and Targets</i>	61
1.4.3.	<i>Programme 4: Output Indicators: Annual and Quarterly Targets</i>	63
1.4.4.	<i>Programme 4: Explanation of Planned Performance over the Medium-Term Period</i>	64
1.4.5.	<i>Programme 4: Resource Considerations</i>	65
1.5.	<i>Programme 5: Tourist Experience</i>	65
1.5.1.	<i>Programme Purpose</i>	65
1.5.2.	<i>Programme 5: Outcomes, Outputs, Output Indicators and Targets</i>	67
1.5.3.	<i>Programme 5: Output Indicators: Annual and Quarterly Targets</i>	69
1.5.4.	<i>Programme 5: Explanation of Planned Performance over the Medium-Term Period</i>	71
1.5.5.	<i>Programme 5: Resource Considerations</i>	72
2.	CONSOLIDATED FINANCIAL PLAN AND 2021/22 MTEF BUDGET ESTIMATES	73
2.1.	<i>Projected Revenue for 2021/22 MTEF</i>	73
2.2.	<i>Projected Expenditure for 2021/22 MTEF</i>	74
3.	UPDATED KEY RISKS	75
4.	PUBLIC ENTITIES	76
5.	INFRASTRUCTURE PROJECTS	77
6.	PUBLIC / PRIVATE PARTNERSHIPS	77
	PART D: TECHNICAL INDICATOR DESCRIPTIONS	78

1. PROGRAMME 1: CORPORATE SUPPORT	78
2. PROGRAMME 2: BUSINESS ENABLEMENT	82
3. PROGRAMME 3: LEISURE TOURISM MARKETING	86
4. PROGRAMME 4: BUSINESS EVENTS	96
5. PROGRAMME 5: TOURIST EXPERIENCE	102
ANNEXURES TO THE ANNUAL PERFORMANCE PLAN	109
ANNEXURE A: AMENDMENTS TO THE STRATEGIC PLAN	109
ANNEXURE B: CONDITIONAL GRANTS	122
ANNEXURE C: CONSOLIDATED INDICATORS	122
ANNEXURE D: DISTRICT DEVELOPMENT MODEL	122

LIST OF FIGURES

Figure 1:	SA Tourism - Constitutional and legislative mandates	18
Figure 2:	SA Tourism - Policy mandates.....	19
Figure 3:	Tourism Sector Recovery Plan – The approach.....	22
Figure 4:	Priority source markets identified to grow tourism into South Africa, 2020-2025.....	24
Figure 5:	South African Tourism's pre-COVID target compared to post-COVID target	25
Figure 6:	International arrivals by region - Year-to-date change January to December 2020.....	28
Figure 7:	IATA - Growth in international and domestic RPKs (November 2020).....	29
Figure 8:	International Travel Stringency Index Weighted by Population (Jan-Nov 2020).....	30
Figure 9:	Travel outlook from priority markets for 2021 based on COVID-19 Status, government responses and flight capacity.....	32
Figure 10:	Relative contribution to South African Tourism spend (ZAR billions) of priority source markets by region, 2019 to 2022.....	33
Figure 11:	Percentage change in occupancy in 2020 relative to the same month in 2019 (December 2020)	34
Figure 12:	SA Tourism's transformation journey	35

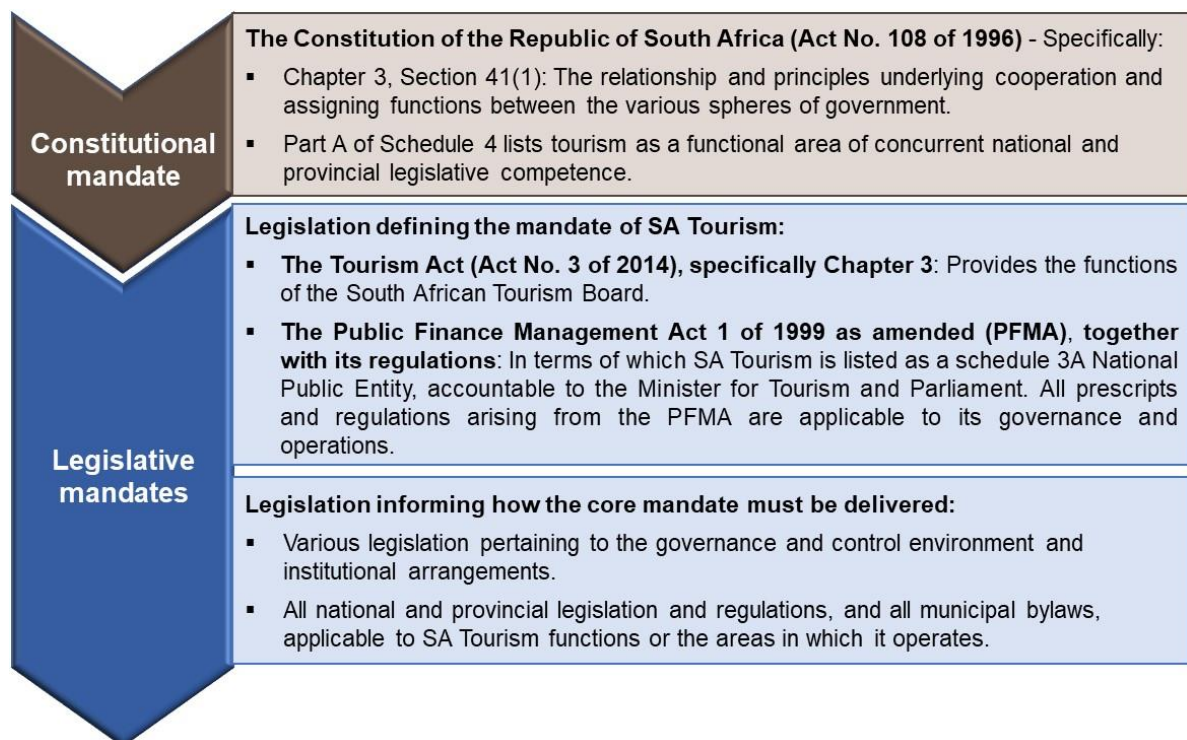
PART A: OUR MANDATE

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 as follows:

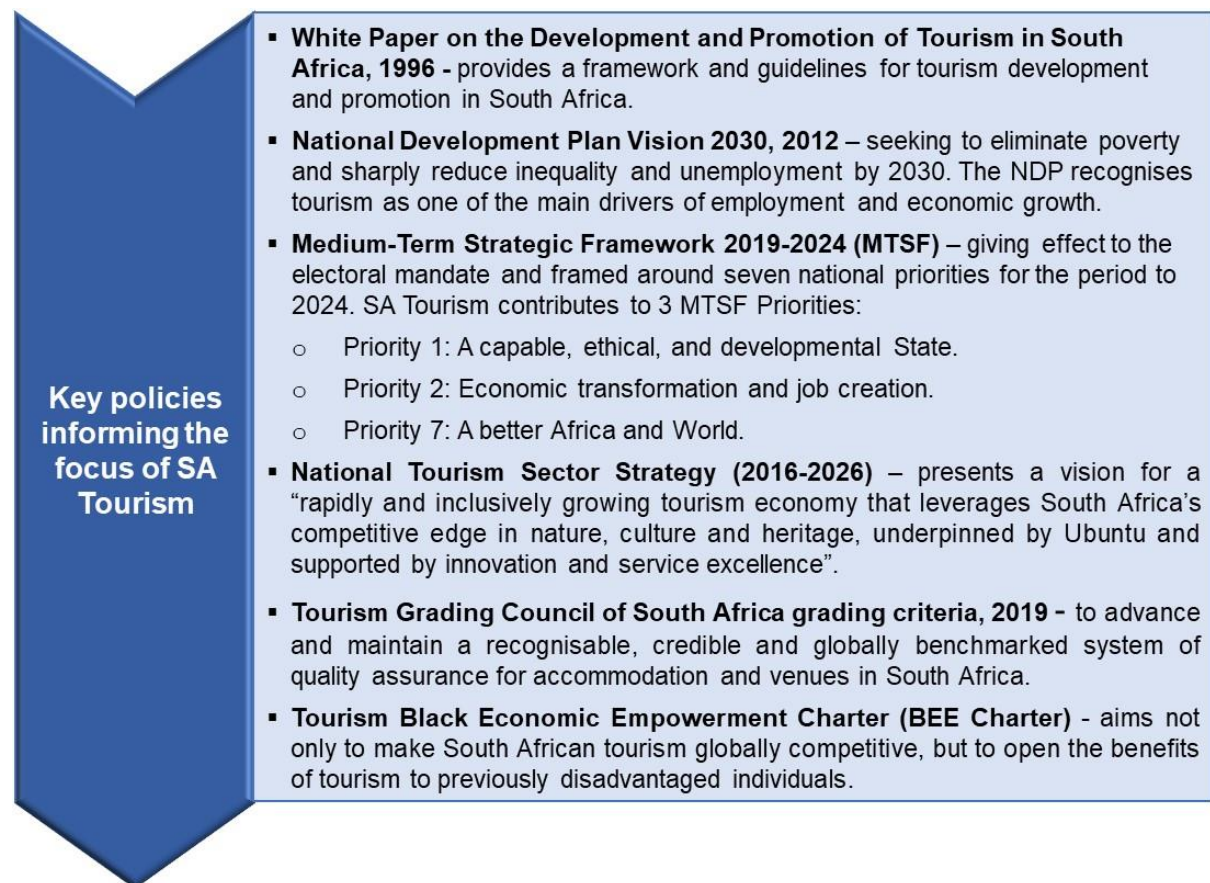
Figure 1: SA Tourism - Constitutional and legislative mandates



1.2. UPDATED POLICY MANDATES

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

Figure 2: SA Tourism - Policy mandates



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 recovery of the economy post the impact of COVID-19.

The ERRP identifies the following 8 priority interventions to drive the reconstruction and recovery of the South African economy:

- 1) Ensuring energy security;
- 2) Growing the productive economy;
- 3) Mass public employment interventions;

- 4) Infrastructure investment;
- 5) Green economy interventions;
- 6) Strengthening food security;
- 7) Support for tourism recovery and growth; and
- 8) Gender equality and the inclusion of women and youth.

In addition to tourism having been identified as one of the priority areas of intervention in the ERRP, the tourism sector has a contribution to make on the following priorities of the ERRP:

- 1) Infrastructure;
- 2) Mass public employment;
- 3) Green economy interventions;
- 4) Gender equality and the inclusion of women and youth; and
- 5) Skills development.

2.2. TOURISM SECTOR RECOVERY PLAN, 2021

COVID-19 and the economic shutdown has had a severe impact on the tourism sector, with many businesses struggling to recover from the related hard lockdown. 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 has been developed as a collaborative and iterative effort by key stakeholders in the tourism value chain. The Plan acknowledges the need for targeted, coordinated action to mitigate the impacts of the crisis, and sets the sector on the most optimal path to recovery, transformation and long-term sustainability.

The Tourism Sector Recovery Plan is anchored on three interlinked pillars or strategic themes: protecting and rejuvenating supply, reigniting demand and strengthening enabling capability for long term sustainability.

In terms of the Plan, the following strategic interventions will be implemented:

- 1) Implement biosecurity norms and standards across the value chain to enable safe travel and rebuild traveller confidence;
- 2) Stimulate domestic demand through targeted initiatives and campaigns;
- 3) Launch an investment and resource mobilisation programme to support supply requirements of the post-COVID-19 era;
- 4) Support for the protection of core tourism infrastructure and assets;

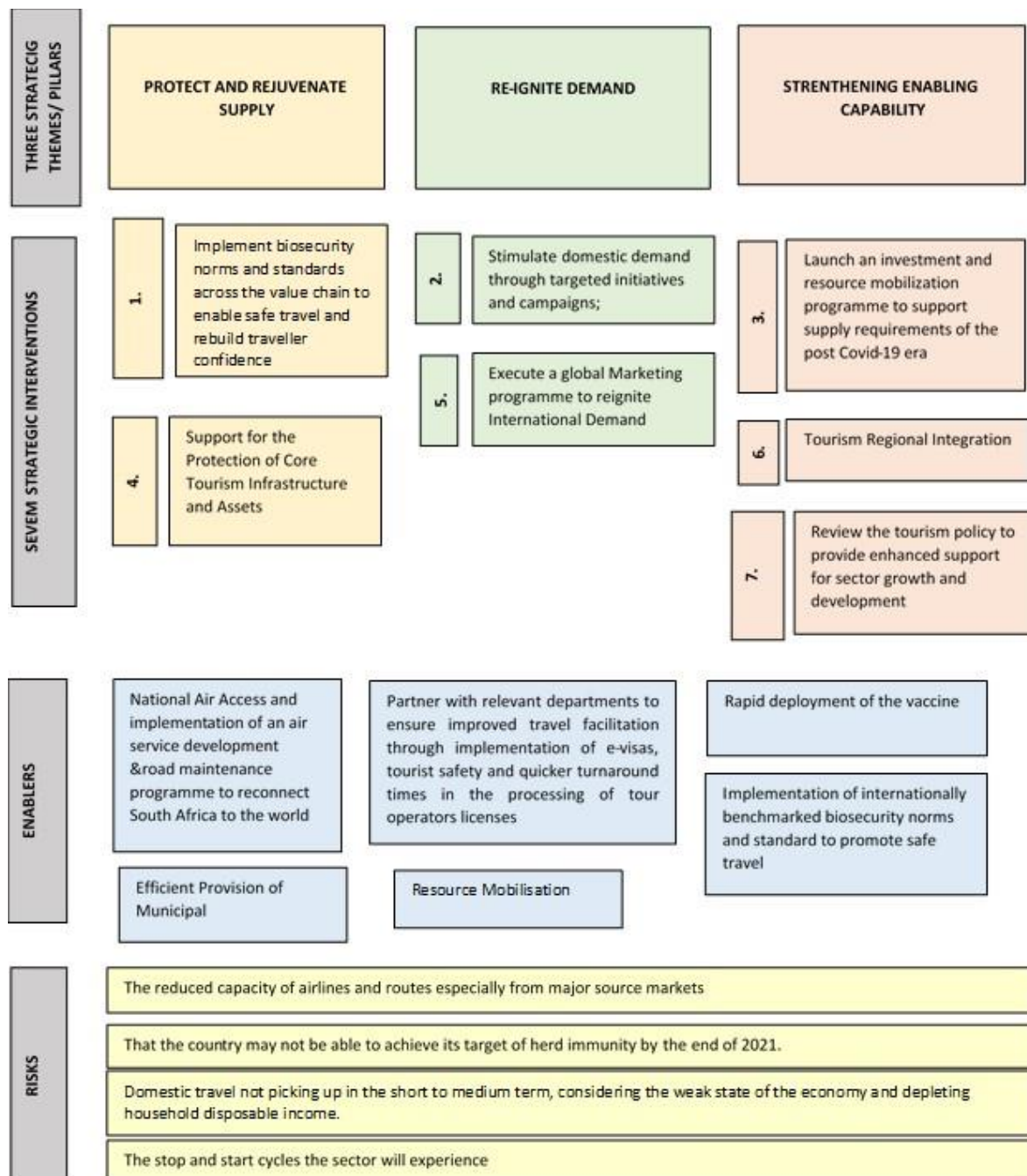
- 5) Execute a global marketing programme to reignite international demand;
- 6) Tourism regional integration; and
- 7) Review the tourism policy to provide enhanced support for sector growth and development outlines specific interventions under each strategic theme, with timeframes and lines of accountability.

These interventions will be implemented simultaneously, taking into account the effects of the stop and start cycles that the sector will be expected to contend with at least in the short to medium term as the virus evolves, bringing with it possible new waves and strains. The impact of the interventions will cut across the three strategic themes of the Plan.

The Plan also identifies enablers to support tourism recovery:

- 1) Form targeted, strategic partnerships between government and industry;
- 2) Partner with relevant departments to ensure improved travel facilitation through implementation of e-visas, tourist safety, airlift capacity, quicker turnaround times in the processing of tour operator licenses;
- 3) Deployment of a vaccine to frontline workers, attainment of population immunity and taking part in global efforts to facilitate safe travel; and
- 4) Stimulate domestic demand through Government consumption expenditure.

Figure 3: Tourism Sector Recovery Plan – The approach



Source: Tourism Sector Recovery Plan, 2021

The socio-economic costs of the COVID-19 pandemic will last for years to come. As a sector that facilitates mobility and human interaction, tourism has been amongst the hardest hit by the pandemic. Tourism revival in South Africa is critical, not just because of the jobs and businesses that it supports, but because, in its interconnectedness, its resilience and its ability to rebound swiftly, tourism can be a catalyst for a broader economic recovery.

It is envisaged that the implementation of the Plan will result in the preservation of a significant amount of value and employment in the sector. It will also ensure that the sector is more sustainable and more resilient going forward. The Plan will yield a recovered sector characterised by greater inclusion.

The tourism sector's potential far exceeds its previous levels. While the COVID-19 crisis has been catastrophic, tourism's long-term growth potential and overall impact on the South African economy is undiminished. The Tourism Sector Recovery Plan seeks not only to lift the sector out of the COVID-19 induced crisis, but also to unleash its long-term growth potential and expand the sector's overall impact on the South African economy.

Associated interventions and accountabilities for government and industry have been identified, and inform an action framework, with the SA Tourism focus and actions, as they inform this Annual Performance Plan, discussed in Part B of this document.

2.3. SA TOURISM MARKETING AND INVESTMENT FRAMEWORK (MIF)

In 2016/17, SA Tourism, in partnership with the Tourism industry, developed a Marketing Investment Framework (MIF) that was 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, SA Tourism then reviews its portfolio in order to improve its ability to dynamically and effectively allocate and manage its budgets and resources.

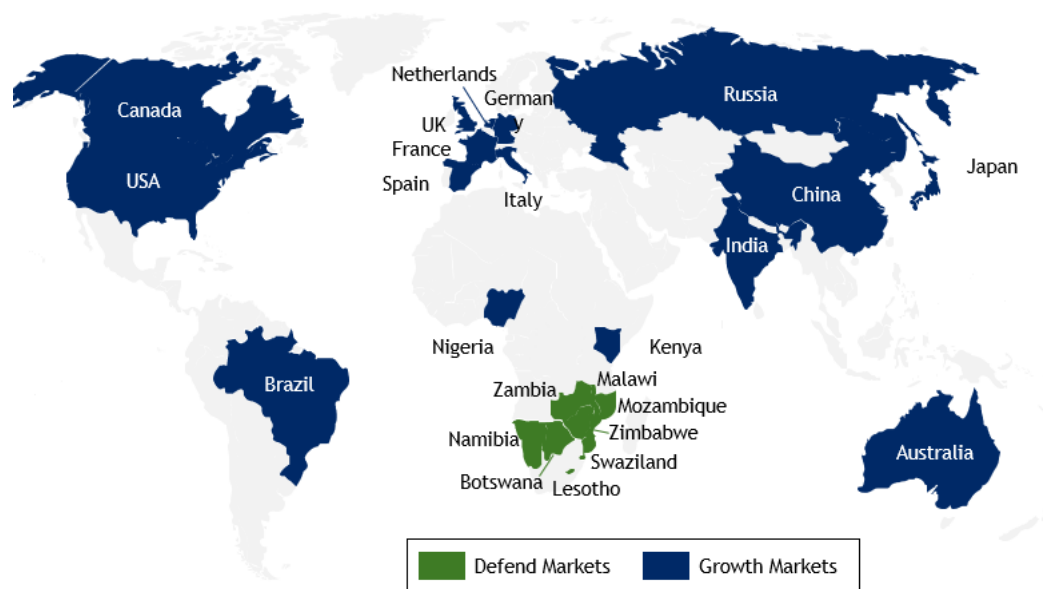
In early 2020, SA Tourism initiated a revision of the Marketing and Investment Framework using 2019 as the base year to review the portfolio. The framework made use of 33 variables related to performance, outlook, South Africa's ability to win in the market, return on past investments, and other criteria. In total, 24 markets / countries are identified for prioritisation, segmented into 16 "Growth" and 8 "Defend" markets, with an additional set of markets ear marked 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 market hold both volume and value importance for South Africa, and SA Tourism needs to necessarily maintain or defend its share.	Maintain the existing share in the market's 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 watch list.	

The revised MIF aims to:

- 1) Review and update the various parameters to ensure a robust view of the current business environment and market prioritisation;
- 2) Support day-to-day decision-making through an enhanced view on increasing efficiency and tapping into short-term opportunities; and
- 3) Transition key elements of the MIF model to a Power Business Intelligence environment, to enable easy access, navigation and usage.

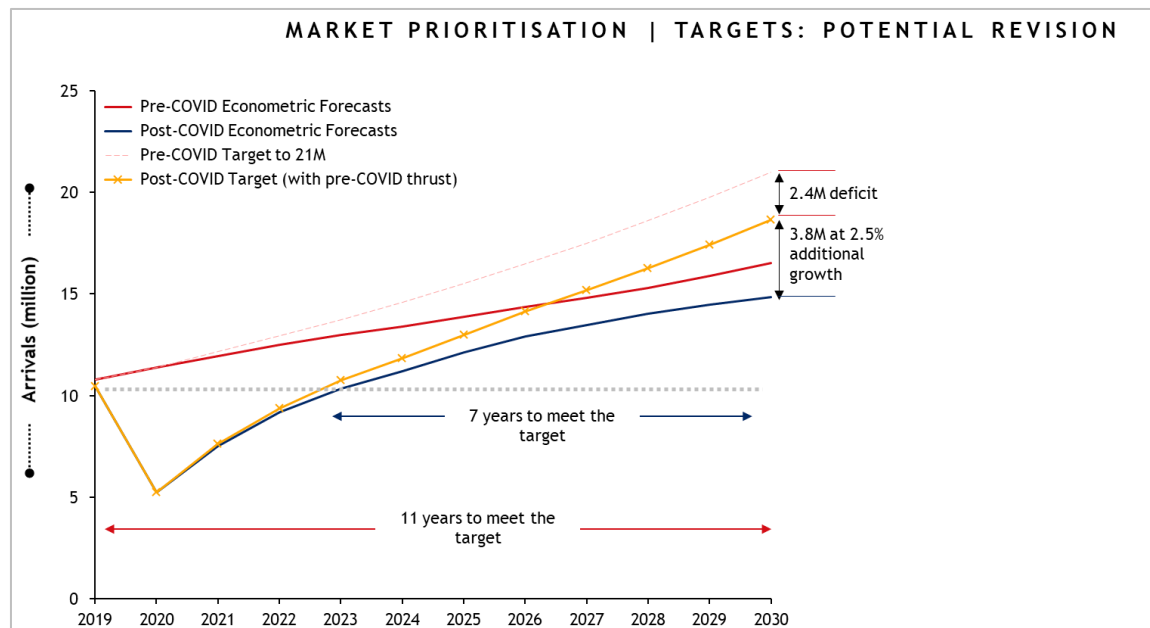
Figure 4: Priority source markets identified to grow tourism into South Africa, 2020-2025



Source: SA Tourism – Marketing and Investment Framework, 2020

SA Tourism had aspired to bolster the econometric growth by 2.5% to meet its 2030 target of 21 million arrivals. However, the econometric forecasts for South Africa have been revised downwards due to the COVID pandemic, which has led to:

- 1) **A widened gap:** Revised 2030 forecasts are lower than previous projections; and
- 2) **A reduced timeframe:** South Africa has a limited time horizon to move towards the 2030 goal, as it is expected that markets will reach pre-COVID levels by 2023/2024.

Figure 5: South African Tourism's pre-COVID target compared to post-COVID target

Source: Market Prioritisation and Investment Framework as at September 2020

The challenges of the unprecedented COVID-19 pandemic, however, have decimated the ability of many of these 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 several months to come.

Consequently, the relative priority of the 24 markets must be considered, in conjunction with dynamic and up to date information of variables that will affect the likelihood of travel from each market. This includes:

- 1) **COVID-19 pandemic severity and outlook:** Which is detailed by the current total cases of COVID-19, the current growth rate of COVID-19 (measured as weekly change per 10 000 of the population), and the projected COVID19 growth rate for Quarter 1 of 2021.
- 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 will influence the readiness of individuals to external travel.
- 3) **Accessibility:** Level of impact of travel to and from South Africa (land, air and sea).
- 4) **Vaccination rollout:** The pace, impact and resultant confidence levels for travel.

3. UPDATES TO RELEVANT COURT RULINGS

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

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 – 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 a sense of appreciation of diversity.
AUTHENTIC / CARING	We show and act with genuine care to each other, customers, shareholder, partners, suppliers, and the business.
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

The UNWTO reports that, globally, 2019 was a year of strong growth in international tourism (+3.8%), although slower compared to the exceptional rates of 2017 (+7%) and 2018 (+6%).

However, in 2020 the world changed with the outbreak of the Coronavirus pandemic (COVID-19). The pandemic saw many countries' economies shut down, and severe restrictions on movement were introduced, as countries battled to protect their citizens from succumbing to the deadly virus. According to the IMF's World Economic Outlook report of October 2020¹, global growth is projected at -4.4 percent in 2020, 0.4 percentage points above the June 2020 World Economic Outlook (WEO) forecast.

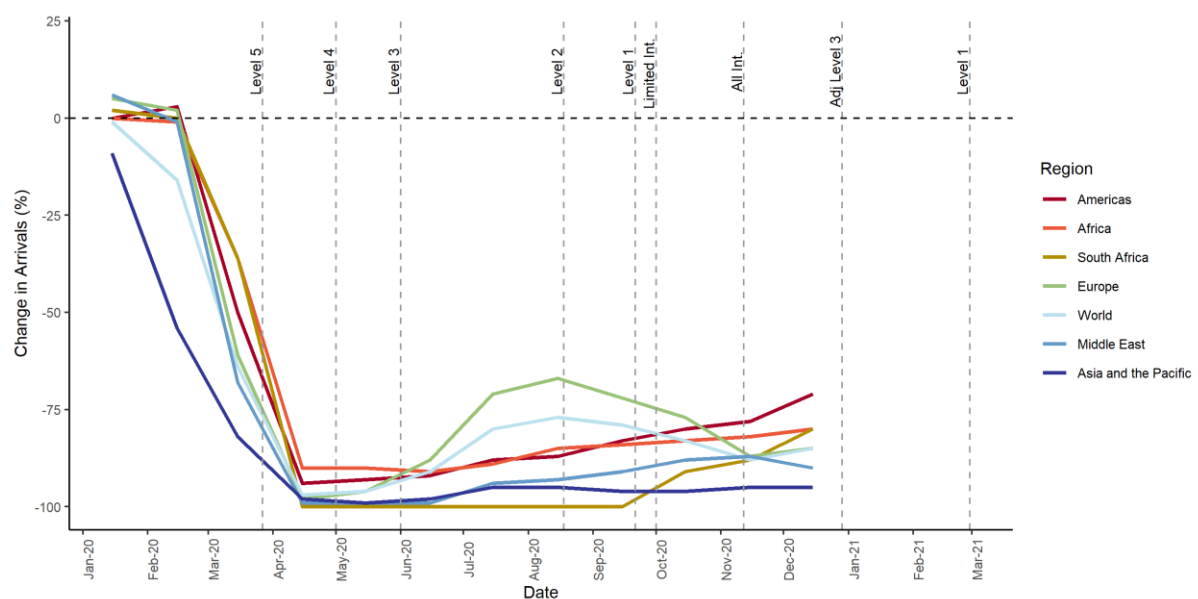
The COVID-19 pandemic had a more negative impact on activity in the first half of 2020 than anticipated, and although recovery began in the third quarter, with the COVID-19 pandemic continuing to spread, many countries have slowed reopening, and some are reinstating partial lockdowns to protect susceptible populations. The recovery is projected to be more gradual than previously forecast. In 2021, global GDP growth is projected at 5.2 percent, slightly lower than the September 2020 forecast. Overall, following the contraction in 2020 and recovery in 2021, the level of global GDP in 2021 is expected to be a modest 0.6 percent above that of 2019. These growth projections imply wide negative output gaps and elevated unemployment rates across both advanced and emerging market economies².

Restrictions on travel, low consumer confidence and the global struggle to contain the COVID-19 virus all contributed to the worst year on record in the history of tourism, with about 90% of all flights grounded. According to UNWTO, international tourist arrivals (overnight visitors) declined by 72% (900 million fewer international tourists) over the first ten months of 2020, compared to the same period in 2019. This translates into a loss of US\$ 935 billion in export revenues from international tourism, more than 10 times the loss under the impact of the global economic crisis in 2008/9³.

¹ IMF World Economic Outlook, October 2020

² IMF World Economic Outlook, October 2020

³ United Nations World Tourism Organisation Barometer, December 2020

Figure 6: International arrivals by region - Year-to-date change January to December 2020

Source: UNTWO (Global)⁴ and StatsSA (RSA)⁵

Based on the current evidence, UNWTO expects international arrivals to have declined by 70% to 75% for the whole of 2020. In this case, global tourism will have returned to levels of 30 years ago, with 1 billion fewer arrivals and a loss of some US\$ 1.1 trillion in international tourism receipts. This drop in tourism could result in an economic loss of US\$ 2 trillion in world GDP⁶.

The extended scenarios for 2021-2024 presented by the United Nations Specialised Agency for Tourism point to a return to 2019 levels in terms of international arrivals taking between two-and-a-half and four years⁷. However, the unpredictability of the evolution of the pandemic and vaccine rollouts leaves the future outlook highly uncertain. Consumer confidence is at record lows, while the deteriorating economic environment will continue to have a negative impact on jobs and disposable income. Travel restrictions are still in place in many destinations and virus containment is slow.

As the first wave of the global pandemic abated, interest in travel began to reignite both globally and in South Africa. However, as many restrictions remained in place and second waves began to gather pace in many markets, this interest has begun to wane. IATA indicates that Revenue

⁴ United Nations World Tourism Organisation Barometer, December 2020

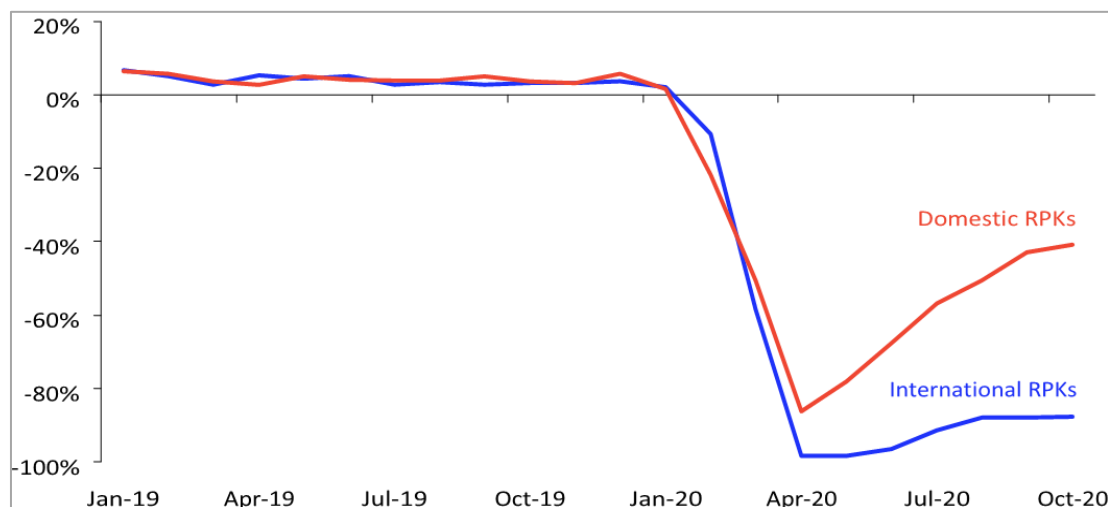
⁵ StatsSA, P0351 – Tourism and Migration December 2020, February 2021

⁶ United Nations World Tourism Organisation Barometer, December 2020

⁷ UNTWO.Org, accessed 17 December 2020

Passenger Kilometres (RPK) for international has stalled since August 2020, and domestic market growth has slowed.

Figure 7: IATA - Growth in international and domestic RPKs (November 2020)

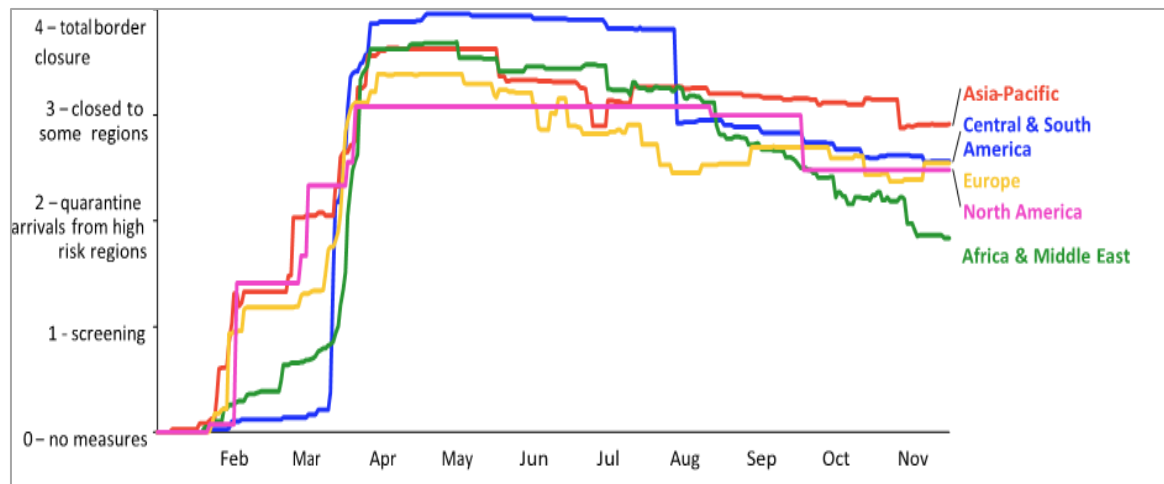


Source: economics@iata.org, accessed 17 December 2020

While the travel and tourism industry is in various stages of recovery, most businesses are performing well below 2019 levels and do not expect to get back to those levels until 2023 or 2024. The lodging industry is performing better in US and China, while India is performing poorly among the reported countries. Flight is performing well in China, as it has opened up to air travel much more than other countries, while drive is performing far better in the US and – Germans seem to be choosing drive holidays over waiting for airlift⁸.

For South Africa, while there is pressure to re-open, most source markets remain severely constrained by travel restrictions and a shortage of air access options. While screening and/or testing is being introduced, a majority of passengers are restricted.

⁸ Skift Research

Figure 8: International Travel Stringency Index Weighted by Population (Jan-Nov 2020)

Source: economics@iata.org, accessed 17 December 2020

At the joint sitting of Parliament on South Africa's Economic Reconstruction and Recovery Plan (15 October 2020), the President stressed the need to respond to the immediate economic impact of COVID-19 by driving job creation and expanding support for vulnerable households. He stated, *"We aim to do this primarily through a major infrastructure programme and a large-scale employment stimulus, coupled with an intensive localisation drive and industrial expansion"* and that key interventions outlined in the Plan will *"resuscitate vulnerable sectors, such as tourism, which have been hard hit by the pandemic"*.

According to the modelling done by National Treasury, the implementation of the Economic Reconstruction and Recovery Plan will raise growth to around 3% on average over the next 10 years. As an apex priority, tourism is expected to make an increasingly more significant contribution to the South African economy, to create jobs and contribute to a better living environment by reducing poverty.

The challenge is to grow current tourism levels to reach the goal of 21 million tourist arrivals by 2030. However, Tourism Decision Metrics (TDM), the forecasting tool developed by Oxford Economics and used by SA Tourism, pre-COVID-19, estimated that on the current trajectory all things being equal, South Africa will receive 16.5 million arrivals in 2030, or 0.74% of global market share if specific interventions are not made to grow tourism. COVID-19 has significantly impacted on the arrival's targets, with revised estimates of 14.8 million being a realistic 2030 target.

A new growth approach needs to be adopted if SA Tourism is to contribute to narrowing the gap to the achievement of the aspirational target of 21 million tourism arrivals by 2030, and supporting the Minister of Tourism's vision for the tourism sector to increase its contribution to GDP from the current 3.5% to >5%, and for domestic tourism to exceed 50 million.

It is within this context that the Tourism Sector Recovery Plan must be implemented with urgency and intent.

1.1.1. THE SA TOURISM ROAD TO RECOVERY

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.

The MIF priority markets were overlayed with pertinent information related to COVID-19 pandemic status, Government stringencies and accessibility. From this assessment, it is evident that travel from the Americas and Europe is likely to be low, due to poor COVID-19 statuses, high government stringencies and reduced flight capacity. While the outlook is more positive in Australasia, travel will still be low due to source market travel and border restrictions and markedly reduced air accessibility.

The outlook for tourism from both Africa and domestic tourism is, however, more promising compared to other regions, due to lower COVID-19 statuses, lower government stringency and greater accessibility into South Africa.

This indicates that a short to medium term focus on domestic and regional travel is critical for recovery.

Figure 9: Travel outlook from priority markets for 2021 based on COVID-19 Status, government responses and flight capacity

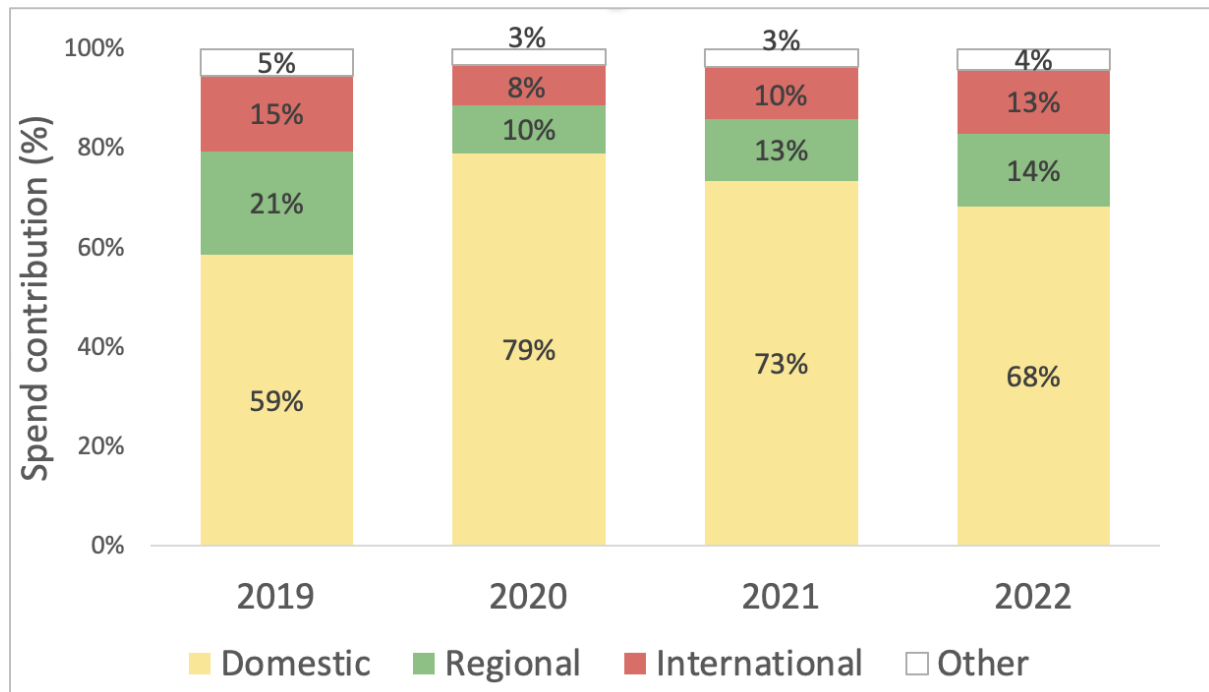


Source: SA Tourism - The Road to Recovery Report

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 SA Tourism spend in 2021 and 82% in 2022. This

calls for a drastic reimagination of SA Tourism that focuses on servicing and growing domestic and regional tourism in order to drive recovery of the tourism sector in the near to medium-term.

Figure 10: Relative contribution to South African Tourism spend (ZAR billions) of priority source markets by region, 2019 to 2022

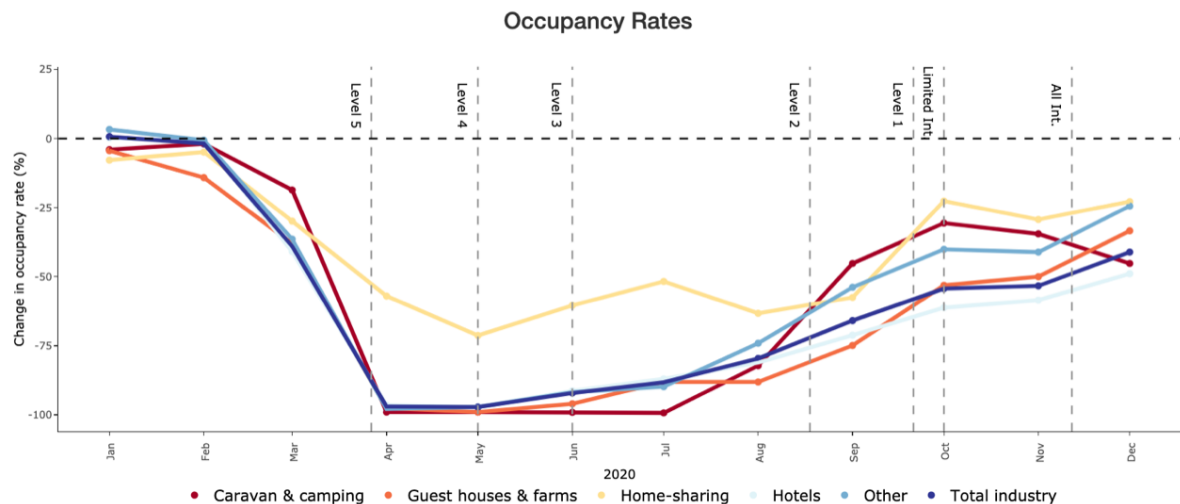


Source: Oxford Economics as at 7 December 2020

A further indicator of the importance of domestic/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 resulted in signs of recovery in all accommodation segments. By October 2020, the greatest 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 mostly attributable to domestic/regional tourism and economic activity since international travel has been minimal⁹.

⁹ SA Tourism - The Road to Recovery Report, Version 1 - December 2020

Figure 11: Percentage change in occupancy in 2020 relative to the same month in 2019 (December 2020)



Source: SA Tourism - The Road to Recovery Report, citing StatsSA¹⁰

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 SA Tourism marketing efforts to be dynamic and adaptive to differing pandemic phases in relevant markets to achieve the longer-term desired growth. Messaging will need to be current and pertinent (e.g., messaging will need to change from pre-vaccine to post-vaccine rollouts).

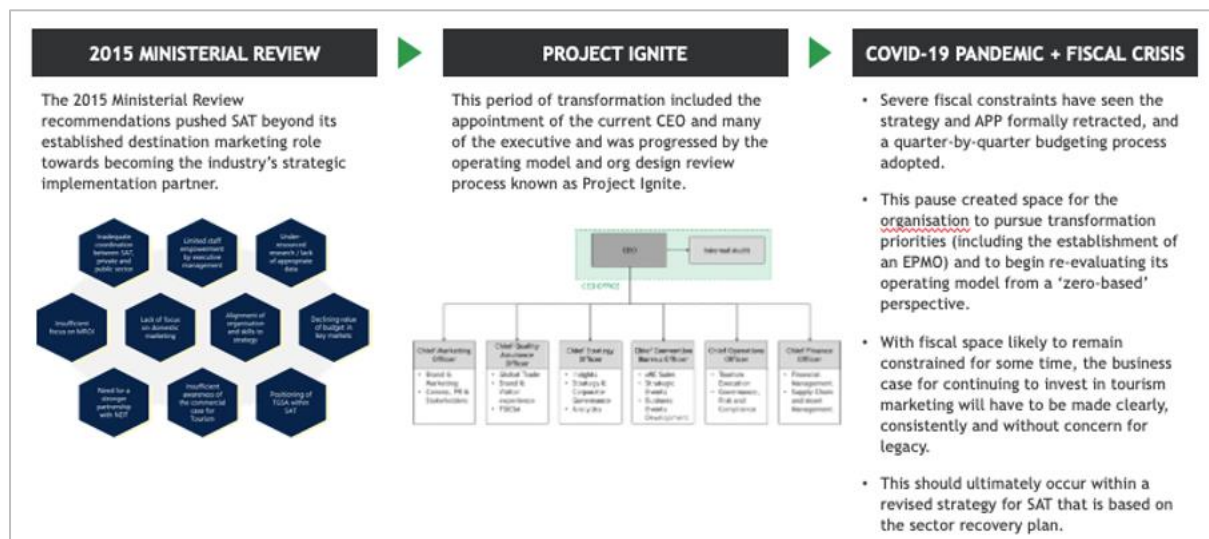
In this uncertain environment, the only certainty is the need for a consistent presence (passive marketing) in the prioritised markets during “the year of the vaccine”, to ensure that SA remains embedded as a top-of-mind destination. The competitive environment for travel post-Covid19 will be heated. In order to maintain and grow share in desired markets we will build momentum throughout the pandemic rather than jostling into action as travel re-emerges. Critically, SA Tourism will continue to tactically engage through reactive and dynamic digital channels as opportune milestones and environments arise throughout the coming year.

¹⁰ StatsSA, P6410 – Tourist Accommodation December 2020, February 2021

1.2. INTERNAL ENVIRONMENT ANALYSIS

SA Tourism has been in a process of transformation since the recommendations of the 2015 Ministerial Review were adopted. This process has been accelerated by the severe fiscal constraints brought about by the COVID-19 crisis.

Figure 12: SA Tourism's transformation journey



Source: 2015 Ministerial Review

The Institutional Architecture (IA) project is a strategic response to the challenge of how SAT can lead sector recovery while simultaneously pursuing its transformation imperative to emerge as a more agile, efficient and effective organisation in support of its vision, mandate and outcomes.

SAT has been in a process of transformation since the recommendations of the 2015 Ministerial Review were adopted. Though the organisation is a competent operator with well-developed capabilities, it carries with high fixed costs, operational risk and legacy operations. COVID-19 has exacerbated the urgency for transformation. The global pandemic has plunged South Africa's tourism industry into crisis and SAT - as the national DMO - has a responsibility to lead recovery efforts against a backdrop of uncertainty, economic devastation and significant fiscal constraints.

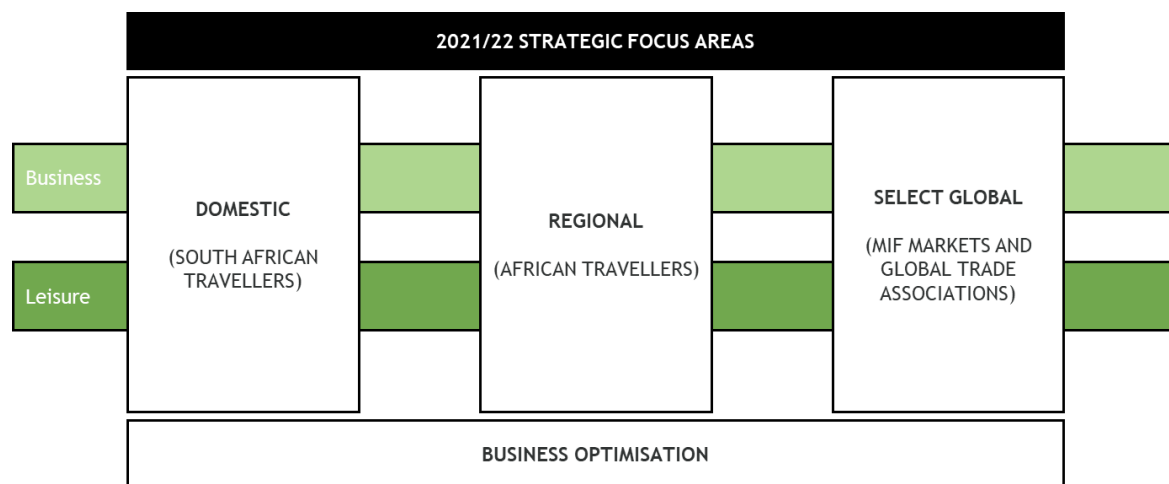
To address the organisation's transformation, as well as the imperative for it to lead sector recovery (and growth beyond that), the IA project was conceived. This process commenced with defining the envisioned future state and will conclude with change implementation. The project was underpinned by the development of a revised operating model and organisation structure that would optimally support the organisation's vision and strategy, while simultaneously capacitating it to lead sector recovery.

Subsequent to this, several factors have emerged as having the potential to significantly impact the design of the new operating model and organisation structure that is in progress. These are the review of the service model for international presence, the review and repurposing of entities including the possible consolidation of these entities, and the governmental review panel looking at legislation which could potentially influence SAT's mandate. Until the implications of these

emerging factors on SAT's operating model and organisational design can be fully understood, the institutional architecture project is focusing on enhancing core competencies, ways of working and capability, in order to enhance organisational effectiveness ahead of any formal structural changes that may be required by policy decisions.

1.3. PRIORITIES INFORMING 2021/22 PLANNING

In planning for 2021/22, the SA Tourism Board, Exco and Management Team reflected on the contribution of SA Tourism to the Tourism Sector Recovery Plan. For the next 12-15 months, given the fast-changing dynamic of the COVID-19 pandemic and related uncertainty, the broader South African Tourism strategic focus is on domestic, regional and select global markets. In each market, a dual business and leisure focus will be adopted, as follows:



The contribution of the SA Tourism business divisions towards these strategic focus areas are:

DOMESTIC (SOUTH AFRICAN TRAVELLERS):		
Accelerate domestic demand and associated revenue for sustained growth.		
Function	Scope	Barriers and Enablers
1. Acquisition and Conversion	Inspire our segments to take more day and leisure trips NOW by showcasing a variety of affordable, desired experiences in a clear and accessible manner that is underlined by the message of personal safety.	Barriers: <ul style="list-style-type: none"> Safety and Security Racial Discrimination Infrastructure (roads) Enablers: <ul style="list-style-type: none"> Digital engagement and listening tools Hyper-personalised experiences Information on leisure and business events activities
2. Visitor Experience/ Supply	Reprioritise the distribution channel to build their knowledge and familiarity of South Africa leisure and business event	Barrier – South African Product Owners (SAPO) not considering the region as viable thus resulting in limited products to sell

DOMESTIC (SOUTH AFRICAN TRAVELLERS):

Accelerate domestic demand and associated revenue for sustained growth.

Function	Scope	Barriers and Enablers
	experiences through reinvented tools and platforms that are in line with the evolution of the consumers	Enablers - Digital platform / tools to enable trade to promote destination; Partners keen to partner with Sho't Left to create hyper-personalised experiences and content
3. Transformation (Demand & Supply)	Expand participation in the tourism value chain – for example: SMME participation at trade shows and events, broadening grading criteria for new entrants and marketing VTSDs for consumer experiences, business events hosted in VTSD	Barrier - Limited number of black owned DMCs Enablers - Partners keen to partner with Sho't Left to create hyper personalised experiences and content; Content in line with consumer needs
4. Intelligence & Analytics/ Finance	Deeper understanding of barriers to travel and experience Brand Tracker for Africa Land markets will be developed	Enabler - Consistent and timeous Brand Tracker reporting
5. Technology	Amplification of experience with digital tools for targeted messaging and measurement (e.g., visitor app, booking tool) Digital and Social monitoring and listening tools	Barrier - Data too expensive Enabler - Monitoring tools for in depth consumer understanding
6. Human Capital	Capacitation of team to do the work on the ground Business Optimisation	Enablers - creation of cross-functional teams and internal support for team
7. Stakeholder Management	Collaborate and define roles between DT, PTA/LTA, Trade	Enablers - Intensified stakeholder engagement with SAPO from Executive Level
8. Other Functions / Considerations	Localise Team Best outcomes Sign Operational Service Level Agreements	Enablers – Operational Service Level Agreements (OLA) that have clear deliverables and penalties; communication strategy and creative from Team Best that can be localised

REGIONAL (AFRICAN TRAVELLERS):

Develop break through communication and content that drive brand positivity messaging to increase arrivals and spend for sustainable growth.

Function	Scope	Barriers and Enablers
1. Acquisition and Conversion	LAND HUB - Encourage repeat travellers to travel more frequently by providing relevant VFM deals and discounts that show new, fun and varied experiences.	Barriers - <ul style="list-style-type: none"> Safety and Security Limited or No airlift/ Limited road transport for land markets Cumbersome Visa processing

REGIONAL (AFRICAN TRAVELLERS):

Develop break through communication and content that drive brand positivity messaging to increase arrivals and spend for sustainable growth.

Function	Scope	Barriers and Enablers
	<p>CENTRAL AFRICA - Market directly to repeat visitors by enticing them to take more holiday breaks through a variety of value for money, cosmopolitan, leisure experiences.</p> <p>EAST AFRICA - Position SA as a friendly and welcoming destination that offers immersive authentic leisure experiences underpinned by people & culture, while showcasing scenic beauty to inspire East Africans to travel to South Africa.</p> <p>WEST AFRICA - Position SA 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.</p>	<p>Enablers -</p> <ul style="list-style-type: none"> Address issues and concerns around Xenophobia through barrier messaging and communication Digital engagement and listening tools Hyper-personalised experiences Engaging with locals (Land Markets)
2. Visitor Experience/ Supply	Reprioritise 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 consumers	<p>Barriers - SAPO not considering the region as viable thus resulting in limited products to sell; Limited / No airlift; Cumbersome Visa processing</p> <p>Enabler - Digital platform / tools to enable trade to promote destination</p>
3. Transformation (Demand & Supply)	Expand participation in the tourism value chain – for example: SMME participation at trade shows and events, broadening grading criteria for new entrants and marketing VTSDs for consumer experiences, business events hosted in VTSD	<p>Barriers - Limited number of black owned DMCs; Negative profiling of African travellers</p> <p>Enablers - In market trade is keen to partner with SAPO to create hyper-personalised experiences and content; Content in line with consumer needs</p>
4. Intelligence & Analytics/ Finance	<p>Deeper understanding of barriers to travel and experience</p> <p>Brand Tracker for Africa Land markets will be developed</p>	<p>Barriers - Delayed stats from StatsSA; Discrepancies between Airlines and StatsSA figures</p> <p>Enabler - Understand consumer needs to inform Land Hub specific product offering (in progress with insight activator)</p>
5. Technology	<p>Amplification of experience with digital tools for targeted messaging and measurement (e.g., visitor app, booking tool)</p> <p>Digital and social monitoring and listening tools</p>	Enabler - Monitoring tools for in depth consumer understanding
6. Human Capital	Capacitation of team to do the work on the ground	Enabler - Creation of cross-functional teams and internal support for team

REGIONAL (AFRICAN TRAVELLERS):

Develop break through communication and content that drive brand positivity messaging to increase arrivals and spend for sustainable growth.

Function	Scope	Barriers and Enablers
	Business Optimisation	
7. Stakeholder Management	<p>Collaborate and define roles between SA Mission in market, DT, PTA/LTA, Trade</p> <p>Collaboration with embassies/Consulates to facilitate removal of visa as a barrier to travel, as well as to promote SA as a tourist and investment destination.</p> <p>Collaborate with Interest groups to stimulate conversion of membership base (polo, golf, cycling, other sports, Arts and Culture etc groups)</p> <p>Collaboration with Apex bodies in source markets (Business Chambers, Institute of Directors etc) to stimulate conversion of MICE travel.</p>	Enabler - Intensified stakeholder engagement with SAPO from Executive Level
8. Other Functions / Considerations	<p>Localise Team Best outcomes</p> <p>Sign Operational Service Level Agreements</p>	Enablers – OLAs that have clear deliverables and penalties; communication strategy and creative from Team Best that can be localised

SELECT GLOBAL (MIF MARKETS AND GLOBAL TRADE ASSOCIATIONS):

Return the core business to marketing.

Function	Scope	Enablers
1. Acquisition and Conversion	<p>Highlight what we are good at which is communication - This needs to be done for business and leisure</p> <p>Collect and analyse customer data to understand best marketing methods</p> <p>Improve process of marketing and communication as current process is killing creativity</p> <p>Improve information access for travellers</p> <p>Partner with associations to bid</p> <p>Target the scalable niches e.g., LGBTQI</p>	<ul style="list-style-type: none"> Information on Quality assurance through COVID care Access to information on immersive experiences Data-driven marketing targeted at scalable niches Global communications campaign toolkits that address all consumer segments Consumer website that features destination information Channels partners website for real-time destination information Associations partnership model
2. Visitor Experience/ Supply	<p>Encourage deep immersive experiences (tour guides)</p>	<ul style="list-style-type: none"> Destination experience activation (more advocacy and use information to drive it) Access to accommodation and airlift Iconic signature destination itineraries

SELECT GLOBAL (MIF MARKETS AND GLOBAL TRADE ASSOCIATIONS):

Return the core business to marketing.

Function	Scope	Enablers
	Engage trade more aggressively to educate them on the value of priority markets and what to do to attract them	
3. Transformation (Demand & Supply)	Expand participation in the tourism value chain – for example: SMME participation at trade shows and events, broadening grading criteria for new entrants and marketing VTSDs for consumer experiences, business events hosted in VTSD	<ul style="list-style-type: none"> Stimulated demand from adventure traveller Activation of trade
4. Intelligence & Analytics/ Finance	<p>Understand traveller segments and preferences</p> <p>Understand competitor consideration set (COVID overlay)</p> <p>Explore opportunities to commercialise our partnerships</p>	<p>Segment-based strategy</p> <ul style="list-style-type: none"> Customer journey initiatives based on dynamic data Competitor insights and impact Partnership commercialisation model (GMAs)
5. Technology	Use digital tool to track repeat visitors and form a strategy to get repeat travellers (e.g., shift business traveller to leisure traveller)	Informed repeat strategy
6. Human Capital	<p>Enable the creation of cross-functional teams</p> <p>Responsibilities should be linked to P&L – along 3 markets</p> <p>Capability over structure (best people for project)</p> <p>Have a reporting team with people who enjoy and are good at reporting - This will allow others to focus on other tasks</p>	<ul style="list-style-type: none"> Cross-functional teams made up of people who have responsibilities along what they do best Cross-functional teams are linked to P&L
7. Stakeholder Management	<p>Collaborate and define roles between DT, PTA/LTA, Trade</p> <p>Supply technical information to stakeholders so that they understand what needs to be done</p>	Whole of state approach focused on corporate brand (all departments, CEO, Board should work together)
8. Other Functions / Considerations	<p>Need to be agile – there is lack of focus on key initiatives - directly linked to inefficiency in planning</p> <p>Improve alignment between what needs to be done at leadership level and what needs to be done at bottom level</p>	1-page strategy for internal use that everyone is aligned on

Arising from the above, the short and medium-term priorities were identified and inform the performance plan for 2021/22 in Part C.

PART C: MEASURING OUR PERFORMANCE

1. INSTITUTIONAL PROGRAMME PERFORMANCE INFORMATION

SA Tourism is constituted by the following budget programmes, which informs the packaging of this Annual Performance Plan:

Programme No.	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.

Informed by the legislative and policy mandates and 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 then presents the outcomes for the five years, aligned to the NDP 2030, MTSF 2019-2024, and the Department's strategic priorities. The above Programmes then 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 to provide effective support services to the organisation, as well as ensure 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 SA 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 SA Tourism.
Human Capital	To build an inspired and energised organisation and to 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 SA 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 5-year target in the approved Strategic Plan:

Institutional Outcome	Outcome indicator	Baseline (2019/20)	5-year target (2024/25)
2. Achieve good corporate and cooperative governance	External audit outcome	Unqualified audit outcome	Unqualified audit outcome maintained

The 2021/22 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		
			2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
2. Achieve good corporate and cooperative governance	2.1. Internal control	Percentage implementation of valid internal and external audit recommendations	N/A	N/A	New indicator	100% implementation of valid audit recommendations	100% implementation of valid audit recommendations	100% implementation of valid audit recommendations	100% implementation of valid audit recommendations
	2.2. Financial management	Payment of compliant invoices within 30 days from date of receipt	N/A	N/A	100%	100%	100%	100%	100%
	2.3. Business process automation	Identified business processes automated	N/A	N/A	New indicator	Human Capital, SCM, Finance and Legal business processes automated	ICT, TE, CMO, TGCSA, NCB business processes automated	Continuous improvement	Continuous improvement
	2.4. Human resources management and development	Staff engagement score	3.1	3.4	3.6	3.4 staff engagement score	3.4 staff engagement score	3.4 staff engagement score	3.4 staff engagement score
		Implementation of Employment Equity Plan: <ul style="list-style-type: none"> Percentage of women in South African Tourism Percentage of women in senior and top management positions 	N/A	N/A	New indicator	60% 50%	60% 50%	60% 50%	60% 50%

OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
		<ul style="list-style-type: none"> Percentage of people with disabilities employed Maintain at least 60% Black people (Africans, Coloureds and Indians) across all occupational levels 				2%	2%	2%	2%
						New indicator	60%	60%	60%

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

OUTPUT	OUTPUT INDICATORS	2021/22 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2021	Q2 Jul - Sep 2021	Q3 Oct - Dec 2021	Q4 Jan - Mar 2022
2.1. Internal control	Percentage implementation of valid internal and external audit recommendations	100% implementation of valid audit recommendations	-	-	-	100% implementation of valid audit recommendations ¹¹
2.2. Financial management	Payment of compliant invoices within 30 days from date of receipt	100%	100%	100%	100%	100%
2.3. Business process automation	Identified business processes automated	ICT, TE, CMO, TGCSA, NCB business processes automated	Testing processes concluded in Q4 20/21	40% ICT, TE, CMO, TGCSA, NCB business processes automated	80% ICT, TE, CMO, TGCSA, NCB business processes automated	100% ICT, TE, CMO, TGCSA, NCB business processes automated
2.4. Human resources management and development	Staff engagement score	3.4 Staff engagement score	-	-	-	3.4 Staff engagement score ¹²
	Implementation of Employment Equity Plan: ▪ Percentage of women in South African Tourism	60%	60%	60%	60%	60%

¹¹ This is a cumulative (year-end target) that will be reported on annually at the end of Q4.

¹² This is a cumulative (year-end target) that will be reported on annually at the end of Q4.

OUTPUT	OUTPUT INDICATORS	2021/22 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2021	Q2 Jul - Sep 2021	Q3 Oct - Dec 2021	Q4 Jan - Mar 2022
	<ul style="list-style-type: none"> Percentage of women in senior and top management positions 	50%	50%	50%	50%	50%
	<ul style="list-style-type: none"> Percentage of people with disabilities employed 	2%	2%	2%	2%	2%
	<ul style="list-style-type: none"> 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 corporate support services to South African Tourism's core business to deliver on 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 2021/22 and beyond is to ensure that SA Tourism deploys its people, processes, technological tools and financial resources in order to improve its effectiveness (SLA-based), as well as its cost and operational efficiency (SLA and activity-based cost) across the organisation.

This will require that there be a focus on attracting and retaining the best talent to deliver on the organisation's outcomes, and on the establishment of cross-functional teams made up of people who have responsibilities along the lines of what they do best.

To improve efficiency through the business, the organisation must evolve to a digital operating model. A key focus will be on the amplification of experiences with digital tools for targeted messaging and measurement (e.g., visitor app, booking tool).

Given the financial constraints facing Government, South African Tourism must identify 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. In this year, operations will focus on activities to deliberately target an increase in the number of female employees and people with disabilities. This is, however, dependent on the number of vacancies that arise during the year.

1.1.5. PROGRAMME 1: RESOURCE CONSIDERATIONS

Programme 1: Administration (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Economic classification:							
Compensation of employees	43 512	45 992	48 568	56 507	54 057	56 161	56 833
Goods and Services	86 762	76 008	75 757	45 139	60 334	69 111	68 872
Depreciation	9717	10 271	10 846	9 800	12 072	4 577	5 861
Total expenses	139 991	132 271	135 171	111 445	126 463	129 849	131 566
Staff complement (no.)	56						

1.2. PROGRAMME 2: BUSINESS ENABLEMENT

1.2.1. PROGRAMME PURPOSE

The Business Enablement Programme is responsible to enhance 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.
Brand and Marketing – Analytics and Insights	To establish Analytics and Insights as a thought leader and trailblazer in tourism intelligence.

In contributing towards the SA 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 5-year targets in the approved Strategic Plan:

Institutional Outcome	Outcome indicator	Baseline (2019/20)	5-year target (2024/25)
2. Achieve good corporate and cooperative governance	SA Tourism corporate brand index	New indicator	Improvement from 2021/22 baseline

The 2021/22 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		
			2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
2. Achieve good corporate and cooperative governance	2.5. Stakeholder relations	Percentage of approved MOUs with provinces implemented	N/A	N/A	N/A	New indicator	100% approved MOUs with provinces implemented	100% approved MOUs with provinces implemented	100% approved MOUs with provinces implemented
	2.6. Industry engagement	B2B and B2C portal supported	N/A	N/A	New indicator	Soft launch of portals by March 2021	Go-Live and support B2B and B2C portals	Support B2B and B2C portals	Support B2B and B2C portals
		SA Tourism corporate brand index	N/A	N/A	N/A	New indicator	Conduct survey to establish new baseline for SA Tourism Reputation Index	Target to be defined based on baseline determined in FY21/22	Target to be defined based on baseline determined in FY21/22
	2.7. Thought leadership/ Analytics and Insights	Number of reports assessing performance of tourism sector produced	N/A	N/A	New indicator	4 tourism sector performance reports	4 tourism sector performance reports	4 tourism sector performance reports	4 tourism sector performance reports
		Number of sector engagements	N/A	N/A	N/A	New indicator	4 sector engagements	4 sector engagements	4 sector engagements

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

OUTPUT	OUTPUT INDICATORS	2021/22 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2021	Q2 Jul - Sep 2021	Q3 Oct - Dec 2021	Q4 Jan - Mar 2022
2.5. Stakeholder relations	Percentage of approved MOUs with provinces implemented	100% approved MOUs with provinces implemented	-	30% approved MOUs with provinces implemented	65% approved MOUs with provinces implemented	100% approved MOUs with provinces implemented
2.6. Industry engagement	B2B and B2C portal supported	Go-Live and support B2B and B2C portals	User Acceptance Testing	Go-Live and Support	Support B2B and B2C portals	Support B2B and B2C portals
	SA Tourism Reputation Index	Conduct survey to establish new baseline	-	Conduct survey to establish new baseline	-	-
2.7. Thought leadership/ Analytics and Insights	Number of reports assessing performance of tourism sector produced	4 tourism sector performance reports	1 tourism sector performance report	1 tourism sector performance report	1 tourism sector performance report	1 tourism sector performance report
	Number of sector engagements	4 sector engagements	1 sector engagement	1 sector engagement	1 sector engagement	1 sector engagement

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, the Analytics and Insights (AI) unit will ensure that 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, and a Brand Tracker for Africa Land markets will be developed to inform Land Hub specific product offering.

The success of delivering the mandate of tourism is dependent on coordination among different stakeholders. In 2021/22 and beyond, focus will be given to:

- 1) Strengthening collaboration and better defining roles between SA Tourism, DT, PTA/LTA, Trade.
- 2) Collaboration with embassies/consulates to facilitate the removal of visa as a barrier to travel, as well as to promote SA as a tourist and investment destination.
- 3) Collaboration with interest groups to stimulate the conversion of their membership base (polo, golf, cycling, other sports, Arts and Culture, etc. groups).
- 4) Collaboration with apex bodies in source markets (Business Chambers, Institute of Directors, etc.) to stimulate conversion of MICE travel.

In an increasingly competitive market and global environment, South African Tourism will define its corporate brand architecture, which will include defining the corporate image (who we are, how we look, values, etc.) and the brand promise (value proposition to the sector).

Internal stakeholders (staff) are equally important and must also be managed to ensure the alignment with the vision of the organisation towards its strategic targets. This will require the development of an internal stakeholder management framework, which will include appropriate products, inter alia, newsletters, regular video calls with hubs, engagements on the brand values, and appropriate use of platforms like social media.

1.2.5. PROGRAMME 2: RESOURCE CONSIDERATIONS

Programme 2: Business Enablement (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Economic classification:							
Compensation of employees	13 185	13 937	14 717	13 517	16 380	17 018	17 222
Goods and Services	68 110	71 993	74 983	20 290	68 605	70 242	71 192

Programme 2: Business Enablement (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Total expenses	81 295	85 929	89 700	33 807	84 985	87 260	88 414
Staff complement (no.)	11						

1.3. PROGRAMME 3: LEISURE TOURISM MARKETING

1.3.1. PROGRAMME PURPOSE

The Leisure Tourism Marketing Programme is responsible to create 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
Tourism Execution	To create demand through travel acquisition, by working with the distribution channels to sell South Africa as a destination.
Brand and Marketing	To grow brand equity to create tourism demand for South Africa as a leisure and business events destination, in identified markets.

In contributing towards the SA 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 5-year targets in the approved Strategic Plan:

Institutional Outcome	Outcome indicator	Baseline (2019/20)	5-year target (2024/25)
1. Increase the tourism sectors 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	R90.7bn
	Increase in the number of domestic holiday trips	7.1 million	7.1 million

Institutional Outcome	Outcome indicator	Baseline (2019/20)	5-year target (2024/25)
	Increase in the value of domestic holiday direct spend	R17.3 billion	R17.3bn
	Seasonality of international tourist arrivals	1.36%	1,3%
	Geographic spread of international tourist arrivals	20%	20%
	Geographic spread of domestic tourist arrivals	8%	8%

Due to the fluctuating state of the virus, the pandemic evolution, the development and dissemination of the vaccine, as well as the volatility and unpredictability of source market border closures and government regulations, the generation of a single non-dynamic version of international arrival and spend targets is not advised. In the South African context for example, the emergence of a new and more virulent version of the virus, completely altered the trajectory of travel recovery within a matter of weeks.

This is not a unique challenge to only SA Tourism. As an example, DMOs, such as Destination Canada, have opted to address this issue by creating three different scenarios of targets; which, although providing some estimate, are still problematic due to the constantly evolving pandemic environment.

In this light, SA Tourism has extended the recovery period by further one year from the Oxford Economics projections. We may achieve the 2019 levels only in 2025. This now factors in the early impact of the second wave experienced in December by South Africa and its neighbouring countries.

In this context, the 2021/22 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		
			2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
1. Increase the tourism sector's contribution to inclusive economic growth	1.1. International tourist arrivals	Number of international tourist arrivals	10.4 million	10.4 million	10.3 million	73.9 thousand	2.6 million	3.5 million	6.5 million
	1.2. Regional tourist arrivals	Number of regional tourist arrivals	7.6 million	7.8 million	7.6 million	2.0 million	2.0 million	2.7 million	4.7 million
	1.3. Domestic holiday trips	Number of domestic holiday trips	2.7 million	3.0 million	7.1 million	3.1 million	3.1 million	3.2 million	3.6 million
	1.4. Domestic holiday spend	Rand value of domestic holiday direct spend	R6.2bn	R10.1bn	R17.3bn	R10.1 bn	R10.1 bn	R10.1 bn	R10.9 bn
	1.5. Domestic day trips	Number of day trips	121.7 million	124.6 million	127.6 million	116.1 million	116.1 million	134.3 million	137.2 million
	1.6. Destination brand strength	Brand strength index (leisure)	37.9	39.9	41.0	39,9	39.9	42.2	42.8
	1.7. Domestic marketing campaigns	Number of domestic deal-driven campaigns implemented	N/A	N/A	N/A	New indicator	4 domestic deal-driven campaigns	4 domestic deal-driven campaigns	4 domestic deal-driven campaigns
		Number of digital engagements - domestic	N/A	N/A	N/A	New indicator	481 720	500 000	520 000
	1.8. Regional marketing campaign	New regional brand campaign implemented	N/A	N/A	N/A	New indicator	1 regional brand campaign implemented	1 regional brand campaign implemented	1 regional brand campaign implemented

OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
		Number of digital engagements - regional	N/A	N/A	N/A	New indicator	85.7m	85.7m	85.7m
	1.9. Global tourism brand campaign	Global tourism brand campaign implemented	N/A	N/A	N/A	New indicator	1 annual campaign launched and global roll-out	1 annual campaign launched and global roll-out	1 annual campaign launched and global roll-out
		Tourism activation at the World Expo 2020 in Dubai	N/A	N/A	N/A	New indicator	Tourism activation at the World Expo 2020 in Dubai implemented	N/A	N/A

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

OUTPUT	OUTPUT INDICATORS	2021/22 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2021	Q2 Jul - Sep 2021	Q3 Oct - Dec 2021	Q4 Jan - Mar 2022
1.1. International tourist arrivals	Number of international tourist arrivals	2.6 million	-	-	-	2.6 million ¹³
1.2. Regional tourist arrivals	Number of regional tourist arrivals	2.0 million	-	-	-	2.0 million ¹⁴
1.3. Domestic holiday trips	Number of domestic holiday trips	3.1 million	-	-	-	3.1 million ¹⁵
1.4. Domestic holiday spend	Rand value of domestic holiday direct spend	R10.1 bn	-	-	-	R10.1bn ¹⁶
1.5. Domestic day trips	Number of day trips	116.1 million	-	-	-	116.1 million ¹⁷

¹³ This is a cumulative (year-end target) that will be reported on annually at the end of Q4.

¹⁴ This is a cumulative (year-end target) that will be reported on annually at the end of Q4.

¹⁵ This is a cumulative (year-end target) that will be reported on annually at the end of Q4.

¹⁶ This is a cumulative (year-end target) that will be reported on annually at the end of Q4.

¹⁷ This is a cumulative (year-end target) that will be reported on annually at the end of Q4.

OUTPUT	OUTPUT INDICATORS	2021/22 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2021	Q2 Jul - Sep 2021	Q3 Oct - Dec 2021	Q4 Jan - Mar 2022
1.6. Destination brand strength	Brand strength index (leisure)	39.9	-	-	-	39.9 ¹⁸
1.7. Domestic marketing campaigns	Number of domestic deal-driven campaigns implemented	4 domestic deal-driven campaigns implemented	1 domestic deal-driven campaign	1 domestic deal-driven campaign	1 domestic deal-driven campaign	1 domestic deal-driven campaign
	Number of digital engagements - domestic	481 720	-	-	-	481 720 ¹⁹
1.8. regional marketing campaign	New regional brand campaign implemented	1 regional brand campaign implemented	1 regional campaign launched	Implementation of regional campaign	Implementation of regional campaign	Implementation of regional campaign
	Number of digital engagements - regional	85.7m	-	-	-	85.7m ²⁰
1.9. Global tourism brand campaign	Global tourism brand campaign implemented	1 Annual campaign launched and global roll-out	1 Annual campaign launched	Implementation of annual campaign	Implementation of annual campaign	Implementation of annual campaign
	Tourism activation at the World Expo 2020 in Dubai	Tourism activation at the World Expo 2020 in Dubai implemented	-	Preparations for tourism activation at the World Expo 2020 in Dubai	Tourism activation at the World Expo 2020 in Dubai implemented	Tourism activation at the World Expo 2020 in Dubai implemented

¹⁸ This is a cumulative (year-end target) that will be reported on annually at the end of Q4.

¹⁹ This is a cumulative (year-end target) that will be reported on annually at the end of Q4.

²⁰ This is a cumulative (year-end target) that will be reported on annually at the end of Q4.

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 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, estimated that South Africa will receive 16.5 million arrivals in that year, 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 SA Tourism strategic focus on domestic, regional and select global markets, the focus for 2021/22 and beyond is:

- 1) To stimulate 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):
 - a) Inspire our segments to take more day and leisure trips NOW by showcasing a variety of affordable, desired experiences in a clear and accessible manner that is underlined by the message of personal safety.
 - b) 'It's your country' - Inspiration cues are national pride, curiosity and exploration, empowerment and the opportunity to reconnect with friends and family.
- 2) To stimulate 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 value for money, cosmopolitan, leisure experiences.
 - c) EAST AFRICA - Position SA 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 SA 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) To stimulate 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.
- c) Develop and implement an associations partnership model.

1.3.5. PROGRAMME 3: RESOURCE CONSIDERATIONS

Programme 3: Leisure Tourism Marketing (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Economic classification:							
Compensation of employees	113 491	103 472	108 916	131 029	120 589	127 772	129 301
Goods and Services	856 861	920 043	954 777	92 284	890 806	910 663	922 877
Depreciation	2 606	2 755	2 909	3 069	3 238	3 364	3 404
Total expenses	972 958	1 026 270	1 066 602	226 382	1 014 633	1 041 799	1 055 582
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.

Business Unit	Aim/ Purpose
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 outcome and 5-year targets in the approved Strategic Plan:

Institutional Outcome	Outcome indicator	Baseline (2019/20)	5-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)

Strategic Plan 5-Year targets are tracked over the 5-year period, however, to enable better monitoring towards their achievement, SA Tourism has annualised the 5-year targets as follows:

Outcome	Outcome indicator	Baseline (2019/20)	2020/21	2021/22	2022/23	2023/24	2024/25
1. Increase the tourism sector's contribution to inclusive economic growth	Number of international business events hosted	230	8	8	24	32	39

The 2021/22 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		
			2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
1. Increase the tourism sector's contribution to inclusive economic growth	1.10. Business Events Destination brand strength	Business Events brand strength index	N/A	N/A	N/A	New indicator	Baseline to be determined in 2021/22	Targets to be defined once baseline determined – for inclusion in 2022/23 APP	
	1.11. Positioning South Africa as a business events destination	Global business events campaign implemented	N/A	N/A	N/A	New indicator	1 global business events campaign	1 global business events campaign	1 global business events campaign
		Domestic business events campaign implemented	N/A	N/A	N/A	New indicator	1 domestic business events campaign	1 domestic business events campaign	1 domestic business events campaign
	1.12. Bid support for international business events	Number of bid submissions	94 bid submissions	109 bid submissions	115 bid submissions	48 bid-submissions	77 bid submissions	93 bid submissions	112 bid submissions
	1.13. National business events hosted in VTSDs	Number of national business events hosted in VTSDs	N/A	N/A	N/A	New indicator	3 national business events to be piloted in VTSD	3 national business events hosted in VTSD	5 national business events hosted in VTSD
	1.14. Business events hosted	Indaba and Meetings Africa hosted	N/A	N/A	N/A	New indicator	Hosting of Indaba and Meetings Africa in a hybrid format	Hosting of Indaba and Meetings Africa	Hosting of Indaba and Meetings Africa

OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
	1.15. Strategic platforms hosted	Lilizela Awards hosted	Lilizela Awards hosted	Lilizela Awards hosted	Lilizela Awards hosted	New indicator	Hosting of Lilizela Awards in a hybrid format	Hosting of Lilizela Awards	Hosting of Lilizela Awards

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

OUTPUT	OUTPUT INDICATORS	2021/22 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2021	Q2 Jul - Sep 2021	Q3 Oct - Dec 2021	Q4 Jan - Mar 2022
1.10. Business Events Destination brand strength	Business Events brand strength index	Baseline determined in 2021/22		-	Study conducted and baseline determined	Targets to be defined once baseline determined – for inclusion in 2022/23 APP
1.11. Positioning South Africa as a business events destination	Global business events campaign implemented	1 global business events campaign	Development of content brief and first review and revert	1 global business events campaign launched	1 global business events campaign implemented	1 global business events campaign implemented
	Domestic business events campaign implemented	1 domestic business events campaign	Development of content brief and first review and revert	1 domestic business events campaign launched	1 domestic business events campaign implemented	1 domestic business events campaign implemented
1.12. Bid support for international business events	Number of bid submissions	77 bid submissions	25 bid submissions	25 bid submissions	13 bid submissions	14 bid submissions
1.13. National business events hosted in VTSDs	Number of national business events hosted in VTSDs	3 national business events to be piloted in VTSD	Infrastructure and supplier assessment conducted in VTSD in preparation for the event hosting pilot	1 national business event piloted in VTSD	1 national business event piloted in VTSD	1 national business event piloted in VTSD
1.14. Business events hosted	Indaba and Meetings Africa hosted	Hosting of Indaba and Meetings Africa in a hybrid format	Hosting of Indaba and Meetings Africa in a hybrid format	-	-	-
1.15. Strategic platforms hosted	Lilizela Awards hosted	Hosting of Lilizela Awards in a hybrid format	-	-	National Lilizela Awards hosted	-

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.

The National Association Plan aims to encourage local-based associations, federations and societies to:

- 1) Rotate their national meetings/conferences across SA – spreading the economic impact of local meetings and conferences to villages, towns and small dorpias (VTSD);
- 2) Create bidding opportunities for VTSDs with the assistance of the Provincial and City Convention Bureaus;
- 3) Assist VTSDs across SA 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 person 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;
- 7) South African Tourism attracts business events (MICE) to South Africa.

Geographic spread of the benefits of tourism is another way of broadening participation in the tourism sector. For this, South African Tourism will use its leverage with national associations to host business events in Villages, Towns and Small Dorpias (VTSDs). Support will be provided to national associations who host their business events in VTSDs.

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 (6) focus sectors of the SANCB. This aligns to the JMIG Global Manifesto (2020) – An industry rationale for the use of Business Events as primary agents for post-pandemic economic recovery and renewal.

For the more immediate period, the SANCB is aligned to the broader South African Tourism strategic focus on events and delegate boosting for domestic, regional and select overseas markets.

1.4.5. PROGRAMME 4: RESOURCE CONSIDERATIONS

Programme 4: Business Events (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Economic classification:							
Compensation of employees	11 209	11 994	12 833	18 067	14 487	15 051	15 231
Goods and Services	107 791	117 293	124 855	5 224	111 972	114 794	116 332
Total expenses	119 000	129 287	137 689	23 291	126 459	129 845	131 563
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 /

Business Unit	Aim/ Purpose
	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 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 5-year targets in the approved Strategic Plan:

Outcome	Outcome indicator	Baseline (2019/20)	5-year target (2024/25)
1. Increase the tourism sector's contribution to inclusive economic growth	Number of SMMEs supported*	182	1096 (cumulative 2020/21-2024/25)
	Net promoter score	91%	94%

*SMMEs supported through Business Events platforms and Visitor Experience events and hosting itineraries.

Strategic Plan 5-Year targets are tracked over the 5-year period, however, to enable better monitoring towards their achievement, SA Tourism has annualised the 5-year targets as follows:

Outcome	Outcome indicator	Baseline (2019/20)	2020/21	2021/22	2022/23	2023/24	2024/25
1. Increase the tourism sector's contribution to inclusive economic growth	Number of SMMEs supported*	182	191	195	216	239	255
	Net promoter score	91%	92%	92%	93%	93%	94%

*SMMEs supported through Business Events platforms and Visitor Experience events and hosting itineraries.

The 2021/22 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		
			2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
1. Increase the tourism sector's contribution to inclusive economic growth	1.16. Quality assured visitor services	Net Promoter Score improvement plan implemented	N/A	N/A	N/A	New indicator	Net Promoter Score improvement plan implemented	Net Promoter Score improvement plan implemented	Net Promoter Score improvement plan implemented
	1.17. Accommodation establishments graded	Number of graded establishments	5 058	5 147	5 173	-	4 707	5 355	5 462
	1.18. Enterprise and supplier development	E&SD programme implemented	N/A	N/A	N/A	New indicator	E&SD programme developed and thereafter implemented	E&SD programme reviewed and enhanced	E&SD programme reviewed and enhanced
		Percentage of total seats at SA Tourism tradeshow platforms dedicated for SMME participants	N/A	N/A	N/A	New indicator	25% of total seats at SA Tourism tradeshow platforms dedicated for SMME participants	25% of total seats at SA Tourism tradeshow platforms dedicated for SMME participants	25% of total seats at SA Tourism tradeshow platforms dedicated for SMME participants
		Basic Quality Verification programme to support new accommodation entrants implemented	N/A	N/A	N/A	New indicator	Baseline to be determined in 2021/22	Targets to be defined once baseline determined – for inclusion in 2022/23 APP	

OUTCOME	OUTPUTS	OUTPUT INDICATORS	AUDITED PERFORMANCE			ESTIMATED PERFORMANCE	MTEF TARGETS		
			2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
		Percentage of qualifying expenditure achieved on procurement from B-BBEE contributor status levels 1-5	N/A	N/A	New indicator	100% procurement from B-BBEE contributor status levels 1-5	100% procurement from B-BBEE contributor status levels 1-5	100% procurement from B-BBEE contributor status levels 1-5	100% procurement from B-BBEE contributor status levels 1-5
		Minimum percentage expenditure achieved on procurement of goods and services from targeted groups	N/A	N/A	New indicator	30% SMMEs, Youth and Women	30% SMME 40% Women-owned 30% Youth-owned 7% PWD-owned	30% SMME 40% Women-owned 30% Youth-owned 7% PWD-owned	30% SMME 40% Women-owned 30% Youth-owned 7% PWD-owned

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

OUTPUT	OUTPUT INDICATORS	2021/22 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2021	Q2 Jul - Sep 2021	Q3 Oct - Dec 2021	Q4 Jan - Mar 2022
1.16. Quality assured visitor services	Net Promoter Score improvement plan implemented	NPS improvement plan implemented	-	NPS improvement plan developed	NPS improvement plan implemented	NPS improvement plan implemented
1.17. Accommodation establishments graded	Number of graded establishments	4 707	3 621	3 983	4 345	4 707
1.18. Enterprise and supplier development	E&SD programme implemented	E&SD programme developed and thereafter implemented	E&SD programme launched	Onboarding of SMMEs onto E&SD programme	E&SD programme implemented	E&SD programme implemented
	Percentage of total seats at SA Tourism tradeshow platforms dedicated for SMME participants	25% of total seats at SA Tourism tradeshow platforms dedicated for SMME participants	25% of total seats for SMME participants	25% of total seats for SMME participants	25% of total seats for SMME participants	25% of total seats for SMME participants
	Basic Quality Verification programme to support new accommodation entrants implemented	Baseline established Targets for 2022/23-2024/25 defined	-	Study conducted to establish baseline	Baseline established Targets for 2022/23-2024/25 defined	-

OUTPUT	OUTPUT INDICATORS	2021/22 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2021	Q2 Jul - Sep 2021	Q3 Oct - Dec 2021	Q4 Jan - Mar 2022
	Percentage of qualifying expenditure achieved on procurement from B-BBEE contributor status levels 1-5	100% procurement from B-BBEE contributor status levels 1-5	-	-	-	100% procurement from B-BBEE contributor status levels 1-5 ²¹
	Minimum percentage expenditure achieved on procurement of goods and services from targeted groups	30% SMME 40% Women-owned 30% Youth-owned 7% PWD-owned	-	-	-	30% SMME 40% Women-owned 30% Youth-owned 7% PWD-owned ²²

²¹ This is a cumulative (year-end target) that will be reported on annually at the end of Q4.

²² This is a cumulative (year-end target) that will be reported on annually at the end of Q4.

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. Each of 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 2021/22 and beyond, a specific focus will be on reviewing the grading system to include emerging product and accommodation SMMEs.

Visitor Experience will focus on enabling the travel trade and associated partners to deliver world class, friendly and efficient services to tourists. A toolkit will be enhanced to assist with targeted training of the travel trade and associated partners, and to encourage deep immersive experiences through tour guides. Travel is about inclusive growth not only for those that are in the tourism sector, but any South African that has business/ experiences to share/ knowledge that would contribute positively to the consumer travel experiences.

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 consumers.

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, our 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 on the provincial air access forums to ensure our insights into inbound global markets are made available to support efforts to secure new entrants to our skies. The SA Specialist programme will undergo an enhancement to ensure content is refreshed and the system functionality is enhanced for optimal user engagement and benefit.

South African Tourism is committed to supporting businesses from designated groups to be viable businesses in the South African economy. Through this programme, South African Tourism will actively increase spend with suppliers in designated groups. At present, a minimum of 30% of spend exceeding R30 million is with designated groups. During this year, activities will be geared to establishing systems and processes to measure the Rand value spent with these groups.

1.5.5. PROGRAMME 5: RESOURCE CONSIDERATIONS

Programme 5: Tourist Experience (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Economic classification:							
Compensation of employees	15 418	16 297	17 209	18 861	19 154	19 899	20 137
Goods and Services	61 203	49 510	51 487	25 200	45 929	46 926	47 573
Total expenses	76 621	65 807	68 695	44 061	65 083	66 825	67 710
Staff complement (no.)	22						

2. CONSOLIDATED FINANCIAL PLAN AND 2021/22 MTEF BUDGET ESTIMATES

2.1. PROJECTED REVENUE FOR 2021/22 MTEF

Revenue	2017/18	2018/19	2019/20	2020/21			2021/22	2022/23	2022/24
(R'000)	Audited	Audited	Audited	Approved	Special Adjustments	Revised Budget	Estimates	Estimates	Estimates
DT Allocation	1,129,288	1,208,048	1,256,523	1,304,306	-866,000	438,306	1,297,038	1,329,206	1,344,672
TOMSA levies	116,841	121,516	133,304	144,224	-144,224	0	50,000	52,400	53,972
Indaba, Meetings Africa & other exhibitions	74,659	58,999	110,189	63,503	-62,823	680	33,498	35,106	36,159
Grading fees	20,646	21,739	23,164	25,134	-25,134	0	12,239	12,826	13,211
Sundry revenue	28,642	37,611	22,498	23,552	-23,552	0	24,847	26,040	26,821
TOTAL	1,370,076	1,447,913	1,545,678	1,560,719	-1,121,733	438,986	1,417,622	1,455,578	1,474,835

2.2. PROJECTED EXPENDITURE FOR 2021/22 MTEF

Name of the Programme		2017/18	2018/19	2019/20	2020/21			2021/22	2022/23	2023/24
		Audited	Audited	Audited	Approved Budget	Special adjustments	Revised Budget	Budget	Budget	Budget
		(R'000)	(R'000)	(R'000)	(R'000)	(R'000)	(R'000)	(R'000)	(R'000)	(R'000)
1	Corporate Support	151,212	158,725	152,190	140,936	-29,491	111,445	126,463	129,849	131,566
2	Business Enablement	60,926	85,929	79,059	94,710	-60,903	33,807	84,985	87,260	88,414
3	Leisure Tourism Marketing	955,996	1,045,306	948,603	1,111,609	-885,227	226,382	1,014,633	1,041,799	1,055,582
4	Business Events	172,123	129,287.00	178,855	140,932	-117,641	23,291	126,459	129,845	131,563
5	Tourist Experience	49,596	65,807.00	77,021	72,532	-28,471	44,061	65,083	66,825	67,710
TOTAL		1,389,853	1,485,054	1,435,727	1,560,719	-1,121,733	438,986	1,417,622	1,455,578	1,474,835

3. UPDATED KEY RISKS

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	Brand and Reputation: <ul style="list-style-type: none"> Impact of country and global epidemics that flare up from time to time. Safety and security. Port of entry restrictions. Ease of access to the destination (due to long-haul air travel) and inadequate infrastructure. Xenophobia, safety and security and racism. Possible dilution of the SA Tourism mandate through the merger. 	<ul style="list-style-type: none"> Develop a crisis management plan for SA Tourism to be implemented as and when such events occur in future. Closer collaboration with stakeholders and the industry to minimise impact and to develop recovery strategies. Collaborative working arrangements with the security cluster and intensive awareness campaigns on tourist and residents' safety. Intensify roll out of the Welcome Campaign and close collaboration with partner departments to increase capacity in visa processing. Better marketing of value proposition through packaging of product diversity. Forge closer working arrangements with the stakeholders to enhance product development. Proactive alignment of brand strategy, key projects & work streams with Brand SA and Proudly SA.
	Business Events: <ul style="list-style-type: none"> Geographical availability of business ready infrastructure. 	<ul style="list-style-type: none"> SA Tourism to implement rotational hosting of small to medium size events to VTSDs (excluding three main regions).
	Socio-demographic: <ul style="list-style-type: none"> Universal accessibility of products. Lack of sector transformation. Availability of graded products in VTSD. Losing transformation gains due to COVID-19. Lack of data to support transformation programme. 	<ul style="list-style-type: none"> Develop and implement South African Tourism Transformation Framework. SA Tourism to implement rotational hosting of small to medium size events to VTSDs (excluding three main regions).

OUTCOME	KEY RISK	RISK MITIGATION
	<ul style="list-style-type: none"> Limited resources - prioritisation matrix has a dependence on resources. 	<ul style="list-style-type: none"> Review SA Tourism financial model and revenue generators.
	<ul style="list-style-type: none"> Relevance of grading model to travellers Integrity of assessor model/programme Ease of accessibility of SA Tourism insights and other relevant information 	<ul style="list-style-type: none"> Implementation of Tourism Net Promoter Score improvement plan. Develop data hub to enable centralisation of relevant information and digitalisation of information sources relating to market expectations and needs.
2. Achieve good corporate and cooperative governance	Reputation: <ul style="list-style-type: none"> Audit outcomes. Fraud and corruption. Cyber risks (vulnerabilities in cyber security) 	<ul style="list-style-type: none"> Strengthening of system of internal controls, including fraud and ethics risk assessments and awareness campaigns Penetration testing. Cyber security awareness. Firewalls and anti-virus tools. Back-up. Incident Management Programme. Robust information security programme.
	Governance: <ul style="list-style-type: none"> Regulatory Framework (potential changes in national policies which impact tourism). SA Tourism mandate over-reach Documented and formalised business processes (Effectiveness of business strategies, operations and architecture) 	<ul style="list-style-type: none"> Actively participate and provide inputs into the development of the regulatory frameworks. Business process management initiative to map all organisational process and ensure integration thereof in order to optimise the business processes.

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

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 and documented in the audit outcome implementation plan. The validity of finding is determined on whether there are supporting documents
Source of data	Audit outcome implementation plan and progress reports
Method of Calculation / Assessment	Count of number of recommendations implemented divided by total number of recommendations, expressed as a percentage
Means of verification	Audit outcome implementation plan and progress reports
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	To achieve 100% implementation
Indicator Responsibility	Divisional Head: Governance, Risk, Compliance and Company Secretariat Divisional Head: Finance and Supply Chain Management (CFO) Divisional Head: Office of the CEO

Indicator Title 2.2.1	Payment of compliant invoices within 30 days from date of receipt
Definition	Measures percentage of 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: creditors payment period
Means of verification	Annually by the Auditor-General as part of the financial viability assessment.
Assumptions	Payment of goods and services from government institutions as well as those which have different payment terms to 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	To achieve 100% implementation
Indicator Responsibility	Divisional Head: Finance and Supply Chain Management (CFO)

Indicator Title 2.3.1	Identified business processes automated
Definition	The indicator measures the extent to which targets set for the automation of SA Tourism business processes are realised
Source of data	<ul style="list-style-type: none"> Approved business automation project plan – reflecting what processes, and by which quarter, are to be automated Quarterly project progress reports reflecting progress in the automation of business processes Project close-out report for each targeted division
Method of Calculation / Assessment	Verification of the achievement of the quarterly targets set for the automation of SA Tourism business processes in business automation project plan, as reported in quarterly project progress reports
Means of verification	<ul style="list-style-type: none"> Approved business automation project plan – reflecting what processes, and by which quarter, are to be automated Quarterly project progress reports reflecting progress in the automation of business processes

	<ul style="list-style-type: none"> Project close-out report for each targeted division
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	To achieve 100% of targeted processes automated
Indicator Responsibility	Divisional Head: Information and Communications Technology (COO)

Indicator Title 2.4.1	Staff engagement score
Definition	A measure of the engagement levels of staff each year. The higher the engagement, the more satisfied staff tend to be. This is a measure of the culture of the organisation.
Source of data	Annual staff engagement survey report
Method of Calculation / Assessment	<ul style="list-style-type: none"> Responses to each question are measured on a five-point rating scale Mean scores are calculated by adding all raw values per question and dividing by the number of responses in each
Means of verification	Annual staff engagement survey report
Assumptions	Human Capital Strategy is implemented
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Annually

Desired Performance	To achieve and maintain a 3.4 staff engagement score, as per the 5-point rating scale used by the survey
Indicator Responsibility	Divisional Head: Human Capital and Facilities Management (COO)

Indicator Title 2.4.2	Implementation of Employment Equity Plan: <ul style="list-style-type: none"> ▪ Percentage of women in South African Tourism ▪ Percentage of women in senior and top management positions ▪ Percentage of people with disabilities employed ▪ Black people (Africans, Coloureds and Indians) representation across all occupational levels
Definition	<ul style="list-style-type: none"> ▪ Percentage women as a proportion of filled posts ▪ Percentage women representation in the senior and top management positions ▪ Percentage representation of people with disabilities as a proportion of the filled posts ▪ Percentage of Black people (Africans, Coloureds and Indians) representation across all occupational levels
Source of data	<ul style="list-style-type: none"> ▪ Employment Equity Plan and/or Report ▪ South African Tourism Quarterly Human Capital Report
Method of Calculation / Assessment	Verification of EE information reported against targets in the EE Plan: <ul style="list-style-type: none"> ▪ Count of number of targeted persons employed divided by total number of funded posts, expressed as a percentage
Means of verification	<ul style="list-style-type: none"> ▪ Employment Equity Plan and/or Report ▪ South African Tourism Quarterly Human Capital Report
Assumptions	SA Tourism can attract people 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	To achieve the defined targets for each category

Indicator Responsibility	Divisional Head: Human Capital and Facilities Management (COO)
---------------------------------	--

2. PROGRAMME 2: BUSINESS ENABLEMENT

Indicator Title 2.5.1	Percentage of approved MOUs with provinces implemented
Definition	The success of delivering the mandate of SA tourism is dependent on coordination and implementation by provincial stakeholders, including Provincial Tourism Authorities
Source of data	<ul style="list-style-type: none"> Signed MOUs with provinces Quarterly progress reports on MOU implementation
Method of Calculation / Assessment	Count of number of provincial MOUs implemented divided by total number of signed provincial MOUs, expressed as a percentage
Means of verification	<ul style="list-style-type: none"> Signed MOUs with provinces Quarterly progress reports on MOU implementation
Assumptions	The tourism sector is opened up after COVID-19 lockdown, and tourism sector recovery is possible
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	All 9 provinces
Calculation Type	Cumulative (year-to-date)
Reporting Cycle	Quarterly
Desired Performance	100% approved MOUs with provinces implemented
Indicator Responsibility	Divisional Head: Office of the CEO

Indicator Title 2.6.1	B2B and B2C portal supported
Definition	A two-way communication platform the centralises communication between the industry and SA Tourism
Source of data	<ul style="list-style-type: none"> B2B Base Portal project plan

	<ul style="list-style-type: none"> Tech Hub project progress reports Project close-out report
Method of Calculation / Assessment	Verification - Go-Live and support for B2B and B2C portals in place by Q2 2021/22
Means of verification	<ul style="list-style-type: none"> B2B Base Portal project plan Tech Hub project progress reports Project close-out report
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 (Q1 and Q2 2021/22)
Desired Performance	Go-Live and support for B2B and B2C portals in place by Q2 2021/22
Indicator Responsibility	Divisional Head: Information and Communications Technology (COO)

Indicator Title 2.6.2	SA Tourism Reputation Index
Definition	<p>An index that calculates whether stakeholders see South African Tourism as a leader in the tourism industry in South Africa.</p> <p>By engaging with key stakeholders, address matters that stimulate tourism growth, South African Tourism will develop a reputation of being the tourism industry leader in SA.</p> <p>This is a new indicator, and the first survey will be conducted in 2021/22 to determine the baseline. Targets for the outer years will be published in the APP for 2022/23.</p>
Source of data	South African Tourism Reputation Index
Method of Calculation / Assessment	Verification - South African Tourism Reputation Index report available in Q2 2021/22 to determine baseline, and define targets for the outer years

Means of verification	South African Tourism Reputation Index
Assumptions	<ul style="list-style-type: none"> ▪ The tourism sector is opened up after COVID-19 lockdown, and tourism sector recovery is possible ▪ Willingness to participate in the survey
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Q2 2021/22, and thereafter Annually
Desired Performance	South African Tourism Reputation Index report available in Q2 2021/22 to determine baseline, and define targets for the outer years
Indicator Responsibility	Divisional Head: Office of the CEO

Indicator Title 2.7.1	Number of reports assessing performance of tourism sector produced
Definition	South African Tourism's market intelligence reports providing insight into the performance of the South African tourism sector that will inform future growth strategies
Source of data	South African Tourism surveys and analysis by the Strategy, Insights & Analytics unit
Method of Calculation / Assessment	Simple count and verification of the tourism sector performance reports produced
Means of verification	Reports published
Assumptions	Adequate resources are available for such reports
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable

Calculation Type	Cumulative (year-end)
Reporting Cycle	Quarterly
Desired Performance	4 quarterly reports produced
Indicator Responsibility	Divisional Head: Brand and Marketing - Analytics and Insights (CMO)

Indicator Title 2.7.2	Number of sector engagements
Definition	<p>South African Tourism will engage the sector and industry on a quarterly basis.</p> <p>The sector engagements will address:</p> <ul style="list-style-type: none"> ▪ Road to Recovery Report on tourism performance ▪ Igniting domestic and regional tourism demand ▪ Domestic distribution channel capacitation ▪ Regional distribution channel capacitation ▪ Speed marketing opportunities
Source of data	Sector engagement reports, signed off by the CEO
Method of Calculation / Assessment	Simple count of the number of sector engagements
Means of verification	Sector engagement reports, signed off by the CEO
Assumptions	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	4 quarterly sector engagements
Indicator Responsibility	Divisional Head: Office of the CEO

3. PROGRAMME 3: LEISURE TOURISM MARKETING

Indicator Title 1.1.1	Number of international tourist arrivals
Definition	<p>An international visitor who stays at least one night in collective or private accommodation in the country visited.</p> <p>Visitor – A visitor is a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main reason other than to be employed by a resident entity in the country or place visited.</p> <p>Tourist – A visitor who stays at least one night in the place visited.</p>
Source of data	Statistics South Africa (Stats SA) release P0351: Tourism & Migration
Method of Calculation / Assessment	<p>Each person entering the borders of South Africa gets their passport stamped and recorded at immigration control by the Department of Home Affairs. These records are then made available on a monthly basis to Statistics South Africa (Stats SA) for processing and reporting on tourism and migration. South African Tourism obtains the information directly from Stats SA.</p> <p>The Tourism & Migration report is available three months after the reported month of travel.</p>
Means of verification	Statistics South Africa (Stats SA) release P0351: Tourism & Migration
Assumptions	<ul style="list-style-type: none"> Stats SA published statistics on tourism arrivals. South Africa's competitiveness improves. No major natural or health disasters to prohibit travel.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Non-cumulative (reported on at year-end – in Q4)
Reporting Cycle	Annually
Desired Performance	Performance higher than target is desirable
Indicator Responsibility	Divisional Head: Tourism Execution (COO)

Indicator Title 1.2.1	Number of regional tourist arrivals
Definition	<p>A visitor from the African Continent (excluding South Africa) who stays at least one night in collective or private accommodation in the country visited.</p> <p>Regional Visitor – A visitor is a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main reason other than to be employed by a resident entity in the country or place visited.</p> <p>Regional Tourist – A visitor who stays at least one night in the place visited.</p>
Source of data	Statistics South Africa (Stats SA) release P0351: Tourism & Migration
Method of Calculation / Assessment	<p>Each person entering the borders of South Africa gets their passport stamped and recorded at immigration control by the Department of Home Affairs. These records are then made available on a monthly basis to Statistics South Africa (Stats SA) for processing and reporting on tourism and migration. South African Tourism obtains the information directly from Stats SA.</p> <p>The Tourism & Migration report is available three months after the reported month of travel.</p>
Means of verification	<p>A visitor from the African Continent (excluding South Africa) who stays at least one night in collective or private accommodation in the country visited.</p> <p>Regional Visitor – A visitor is a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main reason other than to be employed by a resident entity in the country or place visited.</p> <p>Regional Tourist – A visitor who stays at least one night in the place visited.</p>
Assumptions	<ul style="list-style-type: none"> Stats SA published statistics on tourism arrivals. South Africa's competitiveness improves. No major natural or health disasters to prohibit travel.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Non-cumulative (reported on at year-end – in Q4)
Reporting Cycle	Annually
Desired Performance	Performance higher than target is desirable
Indicator Responsibility	Divisional Head: Tourism Execution (COO)

Indicator Title 1.3.1	Number of domestic holiday trips
Definition	<p>All those trips taken within the borders of South Africa by an adult resident in South Africa for the main purpose of a holiday.</p> <p>Domestic tourist – A resident visitor who visits within the economic territory of the country of reference.</p> <p>Trip – A trip refers to the travel by a person from the time of departure from his/her usual residence until he/she returns: a round trip. Trips taken by visitors are tourism trips.</p> <p>Usual environment – The usual environment of an individual, a key concept in tourism, is defined as the geographical area within which an individual conducts his/her regular life routines. To be outside the usual environment, the person should travel more than 40 kilometres from his/her place of residence (one way) and the place should not be visited more than once a week. This includes place of work and place of study. Leisure and recreational trips are included irrespective of frequency.</p>
Source of data	<p>South African Tourism Domestic Tourism Survey</p>
Method of Calculation / Assessment	<p>A monthly interviewer-administered national survey of South African residents aged 18 years and older. The sample is stratified by province, population group and geographic location. The results from the obtained samples are then reweighted to the broader population statistics, based on Stats SA's population estimates.</p> <p>Using the Statistical Package for the Social Sciences system, we calculate the number of domestic trips using the question "In the past 12 months how many trips did you take inside South Africa that lasted at least 1 night, but less than 365 nights?" "How many of these trips were for holiday?"</p> <p>Results of the survey are available three months after the reported month.</p>
Means of verification	<p>South African Tourism Domestic Tourism Survey</p>
Assumptions	<ul style="list-style-type: none"> ▪ The domestic survey has a margin of error of 2.7% at a confidence interval of 95% on the monthly sample. ▪ The economy of South Africa improves as this affects domestic tourists' discretionary income and therefore spend on holidays. ▪ The industry develops packages and price-points that suit the domestic market and offer deals to domestic tourists as this is a trigger for domestic holiday travel.
Disaggregation of Beneficiaries (where applicable)	<p>Not applicable</p>
Spatial Transformation (where applicable)	<p>Not applicable</p>

Calculation Type	Non-cumulative (reported on at year-end – in Q4)
Reporting Cycle	Annually
Desired Performance	Performance higher than target is desirable
Indicator Responsibility	Divisional Head: Tourism Execution (COO)

Indicator Title 1.4.1	Rand value of domestic holiday direct spend
Definition	The money spent on tourism-related activities by an adult resident for holiday trips taken within the borders of South Africa.
Source of data	South African Tourism Domestic Tourism Survey
Method of Calculation / Assessment	<p>A monthly interviewer-administered national survey of South African residents aged 18 years and older. The sample is stratified by province, population group and geographic location. The results from the obtained samples are then reweighted to the broader population statistics, based on Stats SA's population estimates.</p> <p>Using the Statistical Package for the Social Sciences system, we calculate the number of domestic trips using the questions "In the past 12 months how many trips did you take inside South Africa that lasted at least 1 night, but less than 365 nights?", "How many of these trips were for holiday?", and "How much did you spend during the holiday trips?"</p> <p>Spend can only be calculated on a quarterly basis and is only available three months after the reported quarter.</p>
Means of verification	South African Tourism Domestic Tourism Survey
Assumptions	<ul style="list-style-type: none"> ▪ The domestic survey has a margin of error of 2.7% at a confidence interval of 95% on the monthly sample. ▪ The economy of South Africa improves as this affects domestic tourists' discretionary income and therefore spend on holidays. ▪ The industry develops packages and price-points that suit the domestic market and offer deals to domestic tourists as this is a trigger for domestic holiday travel.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable

Calculation Type	Non-cumulative (reported on at year-end – in Q4)
Reporting Cycle	Annually
Desired Performance	Performance higher than target is desirable
Indicator Responsibility	Divisional Head: Tourism Execution (COO)

Indicator Title 1.5.1	Number of day trips
Definition	A trip taken by a South African within South Africa which is outside his/her usual environment (beyond 40 kms from usual environment).
Source of data	SA Tourism domestic survey
Method of Calculation / Assessment	Simple count of the number domestic day trips.
Means of verification	SA Tourism domestic survey
Assumptions	<ul style="list-style-type: none"> ▪ Lockdown level does not restrict day trips. ▪ Means of collecting information dependent on level of lockdown.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Non-cumulative (reported on at year-end – in Q4)
Reporting Cycle	Annually
Desired Performance	Performance higher than target is desirable
Indicator Responsibility	Divisional Head: Tourism Execution (COO)

Indicator Title 1.6.1	Brand strength index (leisure)
Definition	The brand strength index takes into consideration the functional and emotional attributes of the brand, as well as brand reach, and predicts arrivals by assessing the impact of brand metrics across the conversion

	<p>funnel. As an all-encompassing measure of brand performance, South African Tourism seeks an improvement in the brand strength index.</p> <p>The brand strength equation takes into consideration the following elements of a brand:</p> <ul style="list-style-type: none"> ▪ Functional attributes, as reflected in the 'Affordability' metric, which is affiliated to the destination's performance ▪ Emotional attributes, as reflected in the 'Stature' metric, which is affiliated to the destination's personality ▪ Brand reach, as reflected in the 'Awareness' metric
Source of data	South African Tourism Brand Tracker surveys
Method of Calculation / Assessment	<p>The brand strength index is calculated on normalised data for the three attributes, and is represented on a 0–100 scale:</p> <ul style="list-style-type: none"> ▪ Functional attributes, as reflected in the 'Affordability' metric, which is affiliated to the destination's performance ▪ Emotional attributes, as reflected in the 'Stature' metric, which is affiliated to the destination's personality ▪ Brand reach, as reflected in the 'Awareness' metric
Means of verification	South African Tourism Brand Tracker surveys
Assumptions	<ul style="list-style-type: none"> ▪ Competitors will not increase their budgets disproportionately. ▪ There will not be any drastic negative news about the destination.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Annually
Desired Performance	<ul style="list-style-type: none"> ▪ An improvement in the index is desired: an index of 100% is absolute brand strength, while 0% is no brand strength ▪ Targets are based on Brand Strength Model (January 2021)
Indicator Responsibility	<p>Divisional Head: Brand and Marketing, including Analytics and Insights (CMO)</p> <p>Divisional Head: Tourism Execution (COO)</p>

Indicator Title 1.7.1	Number of domestic deal-driven campaigns implemented
Definition	The development and implementation of marketing campaigns that will be flighted
Source of data	<ul style="list-style-type: none"> Marketing plan for each campaign Exco report on implementation of each campaign, reflecting campaign reach and frequency
Method of Calculation / Assessment	Simple count of the number of domestic deal-driven campaigns implemented
Means of verification	<ul style="list-style-type: none"> Marketing plan for each campaign Exco report on implementation of each campaign, reflecting campaign reach and frequency
Assumptions	There is sufficient budget available
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Cumulative (year-end)
Reporting Cycle	Quarterly
Desired Performance	4 domestic deal-driven campaigns implemented per annum
Indicator Responsibility	Divisional Head: Tourism Execution (COO)

Indicator Title 1.7.2	Number of digital engagements - domestic
Definition	The number of consumers that have seen, liked, replied and/ or shared SA Tourism content from/ on digital platforms or social media
Source of data	Google analytics report Social media listening tools
Method of Calculation / Assessment	Simple count of the number of digital engagements

Means of verification	<ul style="list-style-type: none"> Google Analytics Report Social media listening tools
Assumptions	<ul style="list-style-type: none"> 100% of system up time Websites that are functional
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Non-cumulative (reported on at year-end – in Q4)
Reporting Cycle	Annually
Desired Performance	Performance higher than target is desirable
Indicator Responsibility	Divisional Head: Tourism Execution (COO)

Indicator Title 1.8.1	New regional brand campaign implemented
Definition	A marketing campaign specifically targeting the rest of the African continent is implemented
Source of data	<ul style="list-style-type: none"> Regional Brand and Marketing Campaign Plan Exco reports on implementation, reflecting campaign reach and frequency Television or other media campaign elements
Method of Calculation / Assessment	Verification of the implementation of the regional campaign
Means of verification	<ul style="list-style-type: none"> Regional Brand and Marketing Campaign Plan Exco reports on implementation, reflecting campaign reach and frequency Television or other media campaign elements
Assumptions	<ul style="list-style-type: none"> There is sufficient budget available SA Tourism is allowed to distribute campaign in targeted countries

Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Cumulative (year-end)
Reporting Cycle	Quarterly
Desired Performance	1 regional campaign launched in Q1, and thereafter implemented
Indicator Responsibility	Divisional Head: Tourism Execution (COO)

Indicator Title 1.8.2	Number of digital engagements - regional
Definition	The number of consumers that have seen, liked, replied and/ or shared SA Tourism content from/ on digital platforms or social media
Source of data	<ul style="list-style-type: none"> Google Analytics Report Social media listening tools
Method of Calculation / Assessment	Simple count of the number of digital engagements
Means of verification	<ul style="list-style-type: none"> Google Analytics Report Social media listening tools
Assumptions	100% of system up time Websites that are functional
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Non-cumulative (reported on at year-end – in Q4)
Reporting Cycle	Annually
Desired Performance	Performance higher than target is desirable

Indicator Responsibility	Divisional Head: Tourism Execution (COO)
---------------------------------	--

Indicator Title 1.9.1	Global tourism brand campaign implemented
Definition	A marketing campaign specifically targeting the MIF defined global markets is implemented
Source of data	<ul style="list-style-type: none"> Global Brand and Marketing Campaign Plan Exco reports on implementation, reflecting campaign reach and frequency Television or other media campaign elements
Method of Calculation / Assessment	Verification of the implementation of the global campaign
Means of verification	<ul style="list-style-type: none"> Global Brand and Marketing Campaign Plan Exco reports on implementation, reflecting campaign reach and frequency Television or other media campaign elements
Assumptions	There is sufficient budget available
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Cumulative (year-end)
Reporting Cycle	Quarterly
Desired Performance	1 Annual campaign launched in Q1, and thereafter implemented
Indicator Responsibility	Divisional Head: Brand and Marketing (CMO)

Indicator Title 1.9.2	Tourism activation at the World Expo 2020 in Dubai
Definition	<p>A destination promotion campaign to be staged at the World Expo 2020 in Dubai, running from October 2021 to March 2022.</p> <p>December 2021 (Q3) has been allocated as Tourism month.</p>

Source of data	<ul style="list-style-type: none"> Approved World Expo campaign plan Exco reports on implementation, reflecting progress against milestones defined in the approved World Expo campaign plan Campaign elements
Method of Calculation / Assessment	Verification of the implementation of the World Expo campaign plan
Means of verification	<ul style="list-style-type: none"> Approved World Expo campaign plan Exco reports on implementation, reflecting progress against milestones defined in the approved World Expo campaign plan Campaign elements
Assumptions	There is sufficient budget available
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Cumulative (year-end)
Reporting Cycle	Quarterly
Desired Performance	Tourism activation at the World Expo 2020 in Dubai implemented
Indicator Responsibility	Divisional Head: Brand and Marketing (CMO)

4. PROGRAMME 4: BUSINESS EVENTS

Indicator Title 1.10.1	Business Events brand strength index
Definition	<p>The business events brand strength index takes into consideration the functional and emotional attributes of the brand, as well as brand reach; and predicts business events arrivals by assessing the impact of brand metrics across the conversion funnel.</p> <p>As an all-encompassing measure of business events brand performance, South African Tourism seeks an improvement in the brand strength index.</p> <p>The brand strength equation takes into consideration the following elements of a brand:</p>

	<ul style="list-style-type: none"> Functional attributes, as reflected in the 'Affordability' metric, which is affiliated to the destination's performance Emotional attributes, as reflected in the 'Stature' metric, which is affiliated to the destination's personality Brand reach, as reflected in the 'Awareness' metric
Source of data	South African Tourism Business Events Brand Tracker survey
Method of Calculation / Assessment	<p>The brand strength index is calculated on normalised data for the three attributes, and is represented on a 0–100 scale:</p> <ul style="list-style-type: none"> Functional attributes, as reflected in the 'Affordability' metric, which is affiliated to the destination's performance Emotional attributes, as reflected in the 'Stature' metric, which is affiliated to the destination's personality Brand reach, as reflected in the 'Awareness' metric
Means of verification	South African Tourism Business Events Brand Tracker survey
Assumptions	<p>Competitors will not increase their budgets disproportionately</p> <p>There will not be any drastic negative news about the destination</p>
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Annually
Desired Performance	<p>The Business Events Brand Tracker Survey will be conducted for the first time in 2021/22</p> <p>Thereafter, an improvement in the index is desired: an index of 100% is absolute brand strength, while 0% is no brand strength</p>
Indicator Responsibility	Divisional Head: South African National Convention Bureau

Indicator Title 1.11.1	Global business events campaign implemented
Definition	The development and implementation of a global business events marketing campaign that will be flighted
Source of data	<ul style="list-style-type: none"> Marketing plan

	<ul style="list-style-type: none"> Exco reports on implementation, reflecting campaign reach and frequency
Method of Calculation / Assessment	Simple count of the number of global business events marketing campaigns implemented
Means of verification	<ul style="list-style-type: none"> Marketing plan Exco reports on implementation, reflecting campaign reach and frequency
Assumptions	There is sufficient budget available
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Cumulative (year-end)
Reporting Cycle	Quarterly
Desired Performance	1 global business events campaign implemented per annum
Indicator Responsibility	Divisional Head: South African National Convention Bureau

Indicator Title 1.11.2	Domestic business events campaign implemented
Definition	The development and implementation of a domestic business events marketing campaign that will be flighted
Source of data	<ul style="list-style-type: none"> Marketing plan Exco reports on implementation, reflecting campaign reach and frequency
Method of Calculation / Assessment	Simple count of the number of domestic business events marketing campaigns implemented
Means of verification	<ul style="list-style-type: none"> Marketing plan Exco reports on implementation, reflecting campaign reach and frequency
Assumptions	There is sufficient budget available

Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Cumulative (year-end)
Reporting Cycle	Quarterly
Desired Performance	1 domestic business events campaign implemented per annum
Indicator Responsibility	Divisional Head: South African National Convention Bureau

Indicator Title 1.12.1	Number of bid submissions
Definition	The number of bids submitted for international and regional business events (corporate meetings, incentive meetings, international conventions and exhibitions) supported by the South African National Convention Bureau.
Source of data	Signed bid submission letters
Method of Calculation / Assessment	Simple count of the number of bids submitted
Means of verification	Signed bid submission letters
Assumptions	South Africa is considered by associations for events
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Cumulative (year-end)
Reporting Cycle	Quarterly
Desired Performance	Performance higher than target is desirable

Indicator Responsibility	Divisional Head: South African National Convention Bureau
---------------------------------	---

Indicator Title 1.13.1	Number of national business events hosted in VTSDs
Definition	The number of business events supported within South Africa by South African associations in villages, townships and small dorps
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	List of national business events from South African Tourism
Assumptions	Availability of national events to be supported
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Cumulative (year-end)
Reporting Cycle	Quarterly
Desired Performance	Performance higher than target is desirable
Indicator Responsibility	Divisional Head: South African National Convention Bureau

Indicator Title 1.14.1	Indaba and Meetings Africa hosted
Definition	To ensure that Meetings Africa and Africa's Travel Indaba are successfully hosted to benefit the industry
Source of data	<ul style="list-style-type: none"> ▪ Online Diary System ▪ Post Show Report, signed off by the CEO

Method of Calculation / Assessment	Verification - Meetings Africa and Africa's Travel Indaba are hosted as planned
Means of verification	<ul style="list-style-type: none"> Online Diary System Post Show Report, signed off by the CEO
Assumptions	The Indaba and Meetings Africa is hosted in a hybrid format, and is not cancelled
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Annually in Q1
Desired Performance	Meetings Africa and Africa's Travel Indaba are hosted as planned
Indicator Responsibility	Divisional Head: South African National Convention Bureau

Indicator Title 1.15.1	Lilizela Awards hosted
Definition	To ensure that the national Lilizela Awards are successfully hosted to recognise and benefit the industry
Source of data	<ul style="list-style-type: none"> Post Show Report, signed off by the CEO
Method of Calculation / Assessment	Verification – Lilizela Awards is hosted as planned
Means of verification	Post Show Report, signed off by the CEO
Assumptions	The national Lilizela Awards is hosted in a hybrid format, and is not cancelled
Disaggregation of Beneficiaries (where applicable)	Not applicable

Spatial Transformation (where applicable)	Not applicable
Calculation Type	Non-cumulative
Reporting Cycle	Annually in Q3
Desired Performance	Lilizela Awards is hosted as planned
Indicator Responsibility	Divisional Head: South African National Convention Bureau

5. PROGRAMME 5: TOURIST EXPERIENCE

Indicator Title 1.16.1	Net Promoter Score improvement plan implemented
Definition	Measures a consumer's willingness to recommend South Africa to others. It is used to determine customer satisfaction and is also a proxy for brand loyalty A high net promoter score indicates a high propensity for tourists who visited South Africa to recommend it to friends and family
Source of data	<ul style="list-style-type: none"> Net Promoter surveys Exco approved Net Promoter Score improvement plan in Q2 2021/22, defining the quarterly milestones and activities for the balance of the year Quarterly progress reports on implementation of the Net Promoter Score improvement plan, against the milestones defined in the plan
Method of Calculation / Assessment	<ul style="list-style-type: none"> Verification of the achievement of the targets set for the implementation of the approved Net Promoter Score improvement plan, as reported in quarterly project progress reports
Means of verification	<ul style="list-style-type: none"> Exco approved Net Promoter Score improvement plan in Q2 2021/22, defining the quarterly milestones and activities for the balance of the year Quarterly progress reports on implementation of the Net Promoter Score improvement plan, against the milestones defined in the plan
Assumptions	The tourism sector is opened up after COVID-19 lockdown, and tourism sector recovery is possible
Disaggregation of Beneficiaries (where applicable)	Not applicable

Spatial Transformation (where applicable)	Not applicable
Calculation Type	Cumulative (year-end)
Reporting Cycle	Quarterly
Desired Performance	Achievement of the targets set for the implementation of the approved Net Promoter Score improvement plan
Indicator Responsibility	Divisional Head: Visitor Experience

Indicator Title 1.17.1	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 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-to-date)
Reporting Cycle	Quarterly
Desired Performance	Performance higher than target is desirable
Indicator Responsibility	Divisional Head: Visitor Experience

Indicator Title 1.18.1	E&SD programme implemented
Definition	The number of SMMEs that attend tradeshow platforms in which South African Tourism participates and that are included in hosting itineraries This is to ensure that SMMEs gain exposure to local and international tour operators to facilitate inclusive growth for the sector
Source of data	South African Tourism list of SMMEs that attended tradeshow platforms and list of SMMEs used in hosting itineraries
Method of Calculation / Assessment	Simple count of the number of SMMEs provided with access to marketing platforms
Means of verification	South African Tourism list of SMMEs that attended tradeshow platforms and list of SMMEs used in hosting itineraries
Assumptions	SMMEs show an interest in attending the tradeshow. SMMEs will have resources to provide the required service. Tradeshow have limited space which means that there will be a limit on the number of SMMEs that can attend the various tradeshow.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Cumulative (year-end)
Reporting Cycle	Quarterly
Desired Performance	Performance higher than target is desirable
Indicator Responsibility	Divisional Head: Visitor Experience

Indicator Title 1.18.2	Percentage of total seats at SA Tourism tradeshow platforms dedicated for SMME participants
Definition	To ensure that a minimum number / proportion of available seats at tradeshow platforms in which South African Tourism participates are reserved for SMME participants. This is to ensure that SMMEs gain exposure to local and international buyers and operators to facilitate inclusive growth for the sector.

Source of data	South African Tourism list of SMMEs that attended tradeshow platforms.
Method of Calculation / Assessment	Calculation: Number of seats dedicated to SMME participants divided by the total available seats at tradeshow platforms in which South African Tourism participates, expressed as a percentage.
Means of verification	South African Tourism list of SMMEs that attended tradeshow platforms
Assumptions	<ul style="list-style-type: none"> ▪ SMMEs show an interest in attending the tradeshow. ▪ SMMEs will have resources to provide the required service. ▪ The tradeshow platforms are not cancelled.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Non-cumulative (Each quarter is reported separately)
Reporting Cycle	Quarterly (Q2-Q4)
Desired Performance	Performance higher than target is desirable
Indicator Responsibility	Divisional Head: Visitor Experience

Indicator Title 1.18.3	Basic Quality Verification programme to support new accommodation entrants implemented
Definition	<p>Implementation of the Basic Quality Verification project to recognise new entrants in the sector who are not able to be graded at the outset.</p> <p><u>Core cornerstones of the proposed programme:</u></p> <p>Provide a structured development programme to enable tourism products who do not meet core requirements of grading, to enter the tourism sector with confidence and provided access to funding opportunities to develop their offering to meet requirements for formal grading over the short term.</p> <p>The programme ideally will allow products to reside as a Basic Quality Verification recipient for a duration of a maximum of two (2) years after which they would be encouraged to apply for a star grading assessment.</p> <p>Basic Accreditation completed before acceptance to the programme should include:</p> <ol style="list-style-type: none"> 1) Legal Compliance

	<p>2) Cleanliness Standards</p> <p>3) Hygiene Standards</p> <p>4) Comfort and Safety Compliance</p> <p>The proposed Basic Quality Verification project will create a lead pool for the TGCSA to increase memberships in line with the objectives of the Tourism Grading Support Programme and the proposed Basic Quality Verification project could act as a starting point for the formalisation of homestays in South Africa.</p> <p>Verifications could allow for youth employment - graduates could be used to perform these verifications as the technical specialisation required to be an Accredited Assessor is not a requirement.</p>
Source of data	Quarterly Report on project progress against project deliverables
Method of Calculation / Assessment	Verification of progress reports against project deliverables
Means of verification	Progress report against project deliverables
Assumptions	None
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Cumulative (year-to-date)
Reporting Cycle	Quarterly (Q2 and Q3)
Desired Performance	Baseline to be established in 2021/22, and thereafter targets for 2022/23-2024/25 to be defined
Indicator Responsibility	Divisional Head: Visitor Experience

Indicator Title 1.18.4	Percentage of qualifying expenditure achieved on procurement from B-BBEE contributor status levels 1-5
Definition	<p>Measures percentage expenditure from B-BBEE compliant businesses and SMMEs.</p> <p>The indicator is reported on in Q4, but reflects the expenditure across all for quarters (cumulative – year end).</p>

Source of data	Oracle Financial Management System
Method of Calculation / Assessment	Expenditure on procurement from B-BBEE compliant businesses and SMMEs as a proportion of total expenditure.
Means of verification	Procurement report
Assumptions	Procurement from government institutions and for country offices to be excluded.
Disaggregation of Beneficiaries (where applicable)	B-BBEE compliant enterprises (level 1 – 5)
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Non-cumulative (target reported in Q4 annually)
Reporting Cycle	Annually
Desired Performance	To achieve 100% procurement from B-BBEE contributor status levels 1-5
Indicator Responsibility	Divisional Head: Finance and Supply Chain Management (CFO)

Indicator Title 1.18.5	Minimum percentage expenditure achieved on procurement of goods and services from targeted groups
Definition	Measures percentage spending on procurement of goods and services from SMMEs. The indicator is reported on in Q4, but reflects the expenditure across all for quarters (cumulative – year end).
Source of data	Oracle Financial Management System
Method of Calculation / Assessment	Expenditure on procurement from B-BBEE compliant businesses and SMMEs as a proportion of total expenditure.
Means of verification	Quarterly finance reports
Assumptions	Procurement from government institutions and for country offices to be excluded.

Disaggregation of Beneficiaries (where applicable)	Targeted Groups: Women, Youth, People with Disabilities
Spatial Transformation (where applicable)	Not applicable
Calculation Type	Non-cumulative (target reported in Q4 annually)
Reporting Cycle	Annually
Desired Performance	To achieve 30% expenditure on procurement of goods and services from targeted groups
Indicator Responsibility	Divisional Head: Finance and Supply Chain Management (CFO)

ANNEXURES TO THE ANNUAL PERFORMANCE PLAN

ANNEXURE A: AMENDMENTS TO THE STRATEGIC PLAN

The process to develop this 2021/22 Annual Performance Plan began with a critical review of the approved 2020-2025 Strategic Plan, tabled in March 2020. This included reflecting on the experience and learnings from the disruption experienced as a result of the COVID-19 pandemic and the related lockdown.

The amendments to the approved 2020-2025 Strategic Plan arising from the review are limited to outcome indicators and 5-year targets, as reflected below:

PART A OF THE STRATEGIC PLAN - OUR MANDATE:

There are no changes to the Legislative and Policy Mandates presented in the Strategic Plan.

Recently developed Institutional Policies and Strategies are presented in Part A of this Annual Performance plan as updates.

PART B OF THE STRATEGIC PLAN - OUR STRATEGIC FOCUS:

There are no changes to the Vision, Mission and Values statements presented in the approved Strategic Plan.

PART C OF THE STRATEGIC PLAN – MEASURING OUR PERFORMANCE:

There are no changes to the Impact Statement and Outcomes presented in the approved Strategic Plan:

IMPACT	Tourism in South Africa grows and increasingly contributes to GDP, job creation, inclusive economic participation, and is enjoyed by all South Africans.
OUTCOMES	<ol style="list-style-type: none"> 1) Increase the tourism sectors contribution to inclusive economic growth. 2) Achieve good corporate and cooperative governance.

As part of the maturing of the SA Tourism planning, monitoring and reporting environment, through the 2021/22 planning cycle the outcome indicators and 5-year targets reflected in the approved 2020-2025 Strategic Plan were amended, as follows:

AMENDMENTS TO OUTCOME INDICATORS AND 5 YEAR TARGETS:

OUTCOME	APPROVED 2020-2025 STRATEGIC PLAN (MARCH 2020)			AMENDMENT (JANUARY 2021)			NOTE ON AMENDMENT
	Outcome Indicator	Baseline (2019/20)	5-year Target (March 2025)	Outcome Indicator	Baseline (2019/20)	5-year Target (March 2025)	
1. Increase the tourism sectors contribution to inclusive economic growth	Brand strength index	41.0	44.7	-			Dropped to APP Output
	Percentage increase in international tourist arrivals	10.4 million	Increase international tourist arrival with 6% annually by 2024. (14.8 million)	Progress towards doubling international tourist arrivals to 21 million by 2030 (SONA 2019)	10.3 million	Increase international tourist arrival with 6% annually by 2024 (10.3 million by 2024/24)	Indicator and target revised to track broader progress towards SONA 2030 stretch target
	Percentage increase in the value of international tourist spend	R87.4 billion	Increase the value of international tourist arrival with 4% each year. (R128.6 billion)	Increase in the value of international tourist spend	R90.7 billion	R90.7bn	Retained as Outcome indicator Indicator and target revised owing to COVID-19 impact
	Increase in the number of domestic holiday trips	3.0 million	8.3 million	Increase in the number of domestic holiday trips	7.1 million	7.1 million	Retained as Outcome indicator Target revised owing to COVID-19 impact
	Increase in the value of domestic holiday direct spend	R10.1 billion	R19.5 billion	Increase in the value of domestic holiday direct spend	R17.3 billion	R17.3bn	Retained as Outcome indicator Target revised owing to COVID-19 impact
	Percentage growth in tourism's direct	4.53% growth in tourism's direct	3.23% growth in tourism's direct contribution to the	-			Removed from Strategic Plan –

OUTCOME	APPROVED 2020-2025 STRATEGIC PLAN (MARCH 2020)			AMENDMENT (JANUARY 2021)			NOTE ON AMENDMENT
	Outcome Indicator	Baseline (2019/20)	5-year Target (March 2025)	Outcome Indicator	Baseline (2019/20)	5-year Target (March 2025)	
	contribution to the GDP	contribution to the GDP in 2019	GDP per annum by 2024				beyond SA Tourism control
	Percentage increase in tourism's direct contribution to employment.	3.19% tourism's direct employment increase in 2019	Tourism's direct employment increase by a rate of 2.67% per annum by 2024	-			Removed from Strategic Plan – beyond SA Tourism control
	Seasonality of international tourist arrivals	1.36%	1.29%	Seasonality of international tourist arrivals	1.3%	1.3%	Retained as Outcome indicator
	Number of SMMEs supported	207	225	Number of SMME businesses supported <i>(Cumulative of Business Events and Visitor Experience)</i>	182	1096 (cumulative 2020/21-2024/25)	Clarify contribution by two Programmes – to aid clear monitoring and reporting Baseline target revised owing to COVID-19 impact
	Geographic spread of international tourist arrivals	20%	25%	Geographic spread of international tourist arrivals	20%	20%	Retained as Outcome indicator Target revised owing to COVID-19 impact
	Geographic spread of domestic tourist arrivals	8.4%	15%	Geographic spread of domestic tourist arrivals	8%	8%	Retained as Outcome indicator Target revised owing to COVID-19 impact

OUTCOME	APPROVED 2020-2025 STRATEGIC PLAN (MARCH 2020)			AMENDMENT (JANUARY 2021)			NOTE ON AMENDMENT
	Outcome Indicator	Baseline (2019/20)	5-year Target (March 2025)	Outcome Indicator	Baseline (2019/20)	5-year Target (March 2025)	
	Total number of international business events hosted	207	270	Number of international business events hosted	230	111 (cumulative 2020/21-2024/25)	Retained as Outcome indicator Target revised owing to COVID-19 impact
	Net promoter score	91%	94%	Net promoter score	91%	94%	Retained as Outcome indicator Target revised owing to COVID-19 impact
2. Achieve good corporate and cooperative governance	External audit outcomes	Unqualified audit outcome	Unqualified audit outcome maintained	External audit outcome	Unqualified audit outcome	Unqualified audit outcome maintained	Retained as Outcome indicator
	South African Tourism Reputation Index	New indicator Baseline to be determined in 2020/21	Improvement from 2020/21 baseline	South African Tourism Corporate Reputation Index	New indicator Baseline to be determined in 2021/22	Improvement from 2021/22 baseline (Targets to be defined once baseline determined – for inclusion in 2022/23 APP)	Indicator and target revised to be specific on SA Tourism corporate reputation

PART D OF THE STRATEGIC PLAN – OUTCOME TECHNICAL INDICATOR DESCRIPTIONS:

The following revised Outcome Indicator Technical Indicator Descriptions support the revised Outcome information above:

Indicator Title 1.1	Progress towards doubling international tourist arrivals to 21 million by 2030 (SONA 2019)
Definition	<p>An international visitor who stays at least one night in collective or private accommodation in the country visited.</p> <p>Visitor – A visitor is a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main reason other than to be employed by a resident entity in the country or place visited.</p> <p>Tourist – A visitor who stays at least one night in the place visited.</p>
Source of data	Statistics South Africa (Stats SA) release P0351: Tourism & Migration
Method of Calculation / Assessment	<p>Each person entering the borders of South Africa gets their passport stamped and recorded at immigration control by the Department of Home Affairs. These records are then made available on a monthly basis to Statistics South Africa (Stats SA) for processing and reporting on tourism and migration. South African Tourism obtains the information directly from Stats SA.</p> <p>The Tourism & Migration report is available three months after the reported month of travel.</p>
Assumptions	<ul style="list-style-type: none"> Stats SA published statistics on tourism arrivals. South Africa's competitiveness improves. No major natural or health disasters to prohibit travel.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Reporting Cycle	Annual progress against the five-year target
Desired Performance	Performance should be higher than target
Indicator Responsibility	Chief Operations Officer

Indicator Title 1.2	Increase in the value of international tourist spend
Definition	The amount spent directly in South Africa by all foreign tourists excluding amounts spent on capital goods for the duration of their stay in South Africa. This indicator was previously called "Total tourist foreign direct spend".
Source of data	South African Tourism Departure Survey
Method of Calculation / Assessment	<p>A monthly, interviewer-administered survey conducted at OR Tambo and Cape Town International Airports as well as 10 land border posts of South Africa. Sample is drawn proportional to the actual arrivals for the month. Sampling points are the departure lounges at the airports and at three points at the land border posts.</p> <p>The survey results are weighted to the total visitor arrivals into South Africa by air and road per month from the data released by Stats SA. Using the Statistical Package for the Social Sciences system, we calculate the average spend per tourist on the weighted data set for the question "How much was spent in South Africa?" for the number of days spent in South Africa.</p> <p>Spend can only be calculated on a quarterly basis and is only available three months after the reported quarter.</p>
Assumptions	Stats SA published error-free statistics on tourism arrivals as the survey data is weighted on this data.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Reporting Cycle	Annual progress against the five-year target
Desired Performance	Performance should be higher than target
Indicator Responsibility	Chief Operations Officer

Indicator Title 1.3	Increase in the number of domestic holiday trips
Definition	<p>All those trips taken within the borders of South Africa by an adult resident in South Africa for the main purpose of a holiday.</p> <p>Domestic tourist – A resident visitor who visits within the economic territory of the country of reference.</p> <p>Trip – A trip refers to the travel by a person from the time of departure from his/her usual residence until he/she returns: a round trip. Trips taken by visitors are tourism trips.</p>

	Usual environment – The usual environment of an individual, a key concept in tourism, is defined as the geographical area within which an individual conducts his/her regular life routines. To be outside the usual environment, the person should travel more than 40 kilometres from his/her place of residence (one way) and the place should not be visited more than once a week. This includes place of work and place of study. Leisure and recreational trips are included irrespective of frequency.
Source of data	South African Tourism Domestic Tourism Survey
Method of Calculation / Assessment	<p>A monthly interviewer-administered national survey of South African residents aged 18 years and older. The sample is stratified by province, population group and geographic location. The results from the obtained samples are then reweighted to the broader population statistics, based on Stats SA's population estimates.</p> <p>Using the Statistical Package for the Social Sciences system, we calculate the number of domestic trips using the question "In the past 12 months how many trips did you take inside South Africa that lasted at least 1 night, but less than 365 nights?" "How many of these trips were for holiday?"</p> <p>Results of the survey are available three months after the reported month.</p>
Assumptions	<p>The domestic survey has a margin of error of 2.7% at a confidence interval of 95% on the monthly sample.</p> <p>The economy of South Africa improves as this affects domestic tourists' discretionary income and therefore spend on holidays</p> <p>The industry develops packages and price-points that suit the domestic market and offer deals to domestic tourists as this is a trigger for domestic holiday travel</p>
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Reporting Cycle	Annual progress against the five-year target
Desired Performance	Performance should be higher than target
Indicator Responsibility	Chief Operations Officer

Indicator Title 1.4	Increase in the value of domestic holiday direct spend
Definition	The money spent on tourism-related activities by an adult resident for holiday trips taken within the borders of South Africa.

Source of data	South African Tourism Domestic Tourism Survey
Method of Calculation / Assessment	<p>A monthly interviewer-administered national survey of South African residents aged 18 years and older. The sample is stratified by province, population group and geographic location. The results from the obtained samples are then reweighted to the broader population statistics, based on Stats SA's population estimates.</p> <p>Using the Statistical Package for the Social Sciences system, we calculate the number of domestic trips using the questions "In the past 12 months how many trips did you take inside South Africa that lasted at least 1 night, but less than 365 nights?", "How many of these trips were for holiday?", and "How much did you spend during the holiday trips?"</p> <p>Spend can only be calculated on a quarterly basis and is only available three months after the reported quarter.</p>
Assumptions	<p>The domestic survey has a margin of error of 2.7% at a confidence interval of 95% on the monthly sample.</p> <p>The economy of South Africa improves as this affects domestic tourists' discretionary income and therefore spend on holidays</p> <p>The industry develops packages and price-points that suit the domestic market and offer deals to domestic tourists as this is a trigger for domestic holiday travel</p>
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Reporting Cycle	Annual progress against the five-year target
Desired Performance	Performance should be higher than target
Indicator Responsibility	Chief Operations Officer

Indicator Title 1.5	Seasonality of international tourist arrivals
Definition	Managing seasonality ensures that there is year-round economic impact in the form of revenue to tourism businesses and therefore consistent employment for tourism workers. The index measures the variance in tourist arrivals on a month-to-month basis.
Source of data	Stats SA, Tourism & Migration reports

Method of Calculation / Assessment	$S^X = \frac{\sum (a_m - a_{m-1}) \times (a_m - \bar{a}_m) \times 2}{(\bar{a})^2 \times m} \times 100$ <p>Where:</p> <p>a_m = arrivals for month m</p> <p>a_{m-1} = arrivals for month $m-1$</p> <p>\bar{a}_m = mean arrivals year to date to month m</p>
Assumptions	Statistics SA accurately captures the statistics on international tourist arrival
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Reporting Cycle	Annual progress against the five-year target
Desired Performance	Performance should be better than target
Indicator Responsibility	Chief Operations Officer

Indicator Title 1.6	Number of SMME businesses supported
Definition	The number of SMMEs that attend tradeshow platforms in which South African Tourism participates and that are included in hosting itineraries. This is to ensure that SMMEs gain exposure to local and international tour operators to facilitate inclusive growth for the sector.
Source of data	South African Tourism list of SMMEs that attended tradeshow platforms and list of SMMEs used in hosting itineraries.
Method of Calculation / Assessment	<ul style="list-style-type: none"> ▪ The count of SMMEs that attend tradeshow platforms in which South African Tourism participates. ▪ Count of SMMEs used during hosting.
Assumptions	<ul style="list-style-type: none"> ▪ SMMEs show an interest in attending the tradeshow. ▪ SMMEs will have resources to provide the required service. ▪ Tradeshow have limited space which means that there will be a limit on the number of SMMEs that can attend the various tradeshow.
Disaggregation of Beneficiaries (where applicable)	South African Tourism has identified its thresholds, based on “black designated groups” as defined under the codes of best practice issued in terms of Section 9(1) of the Broad Based Black Economic Empowerment Act (2003), and will target:

	<ul style="list-style-type: none"> i) Enterprises which are at least 60% black-youth-owned and -operated ii) Enterprises which are at least 60% black-woman-owned and -operated iii) Enterprises which are at least 30% black-people-with-disabilities-owned and -operated
Spatial Transformation (where applicable)	Not applicable
Reporting Cycle	Annual progress against the five-year target
Desired Performance	1096 SMME businesses supported by 2025 (cumulative)
Indicator Responsibility	Chief Conventions Bureau Officer, and Chief Quality Assurance Officer

Indicator Title 1.7 and 1.8	Geographic spread of international tourist arrivals / Geographic spread of domestic tourist arrivals
Definition	The number of provinces visited by international and domestic tourists for the year. This is a measure of the distribution of travellers throughout the nine provinces to ensure equitable share is received by the respective provinces.
Source of data	South African Tourism's Departure and Domestic Surveys
Method of Calculation / Assessment	<p>Based on the question in the Departure survey "During your visit to South Africa, which provinces did you visit?", the number of tourists who visited each province is calculated and expressed as a percentage. This represents the share of the total arrivals that a province receives.</p> <p>Based on the questions in the Domestic Survey "In the past month how many trips did you take?" and "Of those trips which provinces did you visit?", the number of tourists who visited each province is calculated and expressed as a percentage. This represents the share of the domestic trips that a province receives.</p>
Assumptions	<p>Tourists are interested in visiting other provinces</p> <p>Execution of provincial MOUs by both parties</p>
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Reporting Cycle	Annual progress against the five-year target

Desired Performance	Increase in the number of provinces visited by international and domestic tourists on each trip
Indicator Responsibility	Chief Operations Officer

Indicator Title 1.9	Number of international business events hosted
Definition	<p>Measures the number of business events held by international associations that take place in South Africa.</p> <p>South African Tourism attracts business events to South Africa through the activities of the National Convention Bureau. An increase in the number of business events results in an increase in the number of tourist arrivals which contribute to export earnings for South Africa.</p>
Source of data	International Congress and Convention Association (ICCA) country ranking report and non-ICCA events report
Method of Calculation / Assessment	<p>Research is undertaken to gain the information necessary to make a bid and increase the chance of the bid being successful. Bids are submitted for the international association conferences that meet the ICCA ranking criteria. ICCA only records association conferences that were attended by at least 50 international delegates, rotates to at least three countries and takes place over three days.</p> <p>The non-ICCA events report will consider only international conferences, meetings and conventions that are not hosted by associations and not reported by ICCA and its delegates. This report will be verified by a third party.</p>
Assumptions	Associations are willing to consider South Africa as a business event destination.
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Reporting Cycle	Annual progress against the five-year target
Desired Performance	111 business events by 2025 (cumulative)
Indicator Responsibility	Chief Conventions Bureau Officer

Indicator Title 1.10	Net promoter score
Definition	Measures a consumer's willingness to recommend South Africa to others. It is used to determine customer satisfaction and is also a proxy for brand loyalty. A high net promoter score indicates a high propensity for tourists who visited South Africa to recommend it to friends and family.
Source of data	South African Tourism Departure Surveys
Method of Calculation / Assessment	The percentage of the positive (yes) responses to the question "Would you recommend friends, relatives or colleagues to visit South Africa?"
Assumptions	People willing to participate in the survey
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Reporting Cycle	Annual progress against the five-year target
Desired Performance	94% Net Promoter Score by 2025
Indicator Responsibility	Chief Quality Assurance Officer

Indicator Title 2.1	External Audit outcome
Definition	Sound governance and compliance across the organisation, evidenced by a clean external audit outcome on previous year's financial performance information.
Source of data	External Audit Report from the Auditor-General of South Africa
Method of Calculation / Assessment	Verification – Information contained in the External Audit Report from the Auditor-General of South Africa on the previous year's financial performance and compliance environment.
Assumptions	Effective audit procedures by AGSA on conducting audit
Disaggregation of Beneficiaries (where applicable)	Not applicable

Spatial Transformation (where applicable)	Not applicable
Reporting Cycle	Annual progress against the five-year target
Desired Performance	To achieve and then maintain a clean audit outcome from the Auditor-General of South Africa over the period.
Indicator Responsibility	Chief Financial Officer

Indicator Title 2.2	South African Tourism Corporate Reputation Index
Definition	<p>An index that calculates whether stakeholders see South African Tourism as a leader in the tourism industry in South Africa.</p> <p>By engaging with key stakeholders, address matters that stimulate tourism growth, South African Tourism will develop a reputation of being the tourism industry leader in SA. This is a new indicator that will be developed in 2020/21. Five-year target to be calculated after establishing the baseline. The target will be published as an Annexure in the APP 2021/22.</p>
Source of data	South African Tourism Corporate Reputation Index
Method of Calculation / Assessment	Verification – Information contained in the South African Tourism Corporate Reputation Index
Assumptions	Willingness to participate in the survey
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	Not applicable
Reporting Cycle	Annual progress against the five-year target
Desired Performance	Baseline to be determined in 2021/22, and thereafter an improvement from 2021/22 baseline over the period to 2025
Indicator Responsibility	Chief Marketing Officer

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.