



SOUTH AFRICAN TOURISM

SOUTH AFRICAN TOURISM

FIVE-YEAR STRATEGIC PLAN: 2025 - 2030

EXECUTIVE AUTHORITY STATEMENT

Tourism is the heartbeat of South Africa's economic recovery. It is an industry that creates jobs, connects people, and showcases our nation's unparalleled beauty and culture.

The 2024 general elections in South Africa ushered in a Government of National Unity (GNU) built on the foundation of collaboration. This spirit of unity continues to guide our efforts as we drive the growth of the tourism sector. The key priorities of the GNU include driving inclusive growth and job creation, reducing poverty, tackling the high cost of living, and building a capable, ethical state.

The Medium-Term Development Plan for the period 2024 to 2029 positions tourism as an essential component of inclusive growth, poverty reduction, and state development, ensuring that efforts align with South Africa's broader development agenda. Our plans as a tourism portfolio align with these national priorities, including the objectives of the Tourism Sector Masterplan and the National Tourism Sector Strategy.

In this regard, South African Tourism will discharge its mandate to effectively market South Africa as a destination locally and internationally. We are also investing in our digital infrastructure to enhance our tourism offering. I am proud to see the South African tourism industry embracing new technologies like artificial intelligence (AI).

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

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

We are forging strong partnerships with various sectors and departments to improve the visa regime, enhance safety, increase airlift capacity, and promote investment in tourism infrastructure. This is important as we strive to remove barriers to travel and improve the visitor experience. A focus on responsible tourism practices will underpin our efforts, ensuring that tourism thrives today and leaves a lasting legacy for future generations.

While the private sector drives growth in tourism, the government's role is to create the conditions and environment conducive to the private sector's creation of jobs. The economy is about demand and supply, and the government's role in the tourism sector is to provide supply.

Through our plans over the next five years, the tourism portfolio will drive initiatives that create greater parity in the tourism sector, especially for women, youth, and persons with disabilities. Equally important is transformation in the sector. Our strategic outlook for the next five years is ambitious yet achievable, provided we all work together to continue to build and transform our sector.



Ms Patricia de Lille, MP
Minister for Tourism

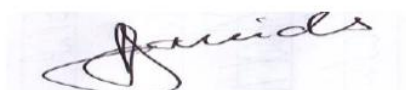
ACCOUNTING AUTHORITY STATEMENT

The South African Tourism Board present the five-year strategic plan to achieve the constitutional and legislative mandate to market our country as an attractive leisure and business events tourist destination. Tourism is a major contributor to our GDP and fulfils an important role to address the triple challenge of unemployment, poverty, and inequality. The five-year strategic plan is informed by the United Nations 2030 Agenda for Sustainable Development and the Sustainable Development Goals (SDGs). In particular, “that tourism is a driving force towards economic growth, inclusive development and environmental sustainability.”

The five-year strategic plan is shaped to realise the National Development Plan, Vision 2030, whose objective is to eliminate poverty and reduce inequality and unemployment by 2030. Tourism has an important role to play to achieve the afore and one of the main drivers of employment and economic growth. The five-year strategic plan builds on our past success and provides a future-oriented direction to achieve the overarching mandate to market our country as an attractive leisure and business events tourist destination.

Effective implementation relies on strong collaboration with all stakeholders, including the Department of Tourism, industry partners, civil society, and other relevant public entities. As a collective, we must leverage our strengths, share insights, and develop cohesive strategies to ensure that South Africa remains an attractive destination for both domestic and international travellers.

I would like to thank the Minister of Tourism, Honourable Patricia de Lille, for her unwavering support and leadership. She has built a strong relationship between government, private sector, and civil society, and has unlocked obstacles and opportunities to advance tourism.



Professor Gregory Davids

Chairperson

SOUTH AFRICAN TOURISM BOARD

ACCOUNTING OFFICER STATEMENT

I am pleased to present South African Tourism's Five-Year Strategic Plan for the period 2025 to 2030. In crafting this plan, we engaged in bold, insightful discussions that reflect our unwavering commitment to positioning South Africa as a premier destination for both leisure and business travel. Despite the significant challenges our organisation has faced over the past year, we have remained focused on our mission. We are now excited to forge a clear path forward in an ever-evolving global tourism landscape.

This year, we made remarkable strides in positioning South Africa as a value-for-money tourist destination. Despite the challenges we encountered, we successfully delivered on our mandate to elevate South Africa's presence on the global stage. In the 2023/24 financial year, South African Tourism, through our business events arm—the South African National Convention Bureau—generated R124 million from exhibitions, conferences, and business meetings. Our Grading Council also played a key role in ensuring quality assurance for 4,668 properties, contributing R15 million in grading revenue.

Through intensified marketing efforts and in partnership with the broader tourism sector, we strengthened our positioning as an appealing destination. This focused approach resulted in international tourist arrivals reaching 2.4 million from January to March 2024; a significant 15.4% increase compared to the same period in 2023. Furthermore, our commitment to transformation has enabled us to support women-led tourism enterprises and youth participation, ensuring that growth is inclusive and benefits all South Africans.

Over the next five years, we are set to elevate our marketing efforts with even greater intensity, drawing more international visitors to our shores while also inspiring South Africans to discover the beauty of their own country. In doing so, we will not only enrich lives but also strengthen our economy and boost our national GDP. Guided by the Market Prioritisation and Investment Framework, we will focus on our defend, growth, and watchlist markets to maximise our marketing returns. Our enhanced use of digital marketing platforms and customer relationship management systems will enable us to engage audiences more effectively and provide seamless visitor experiences.

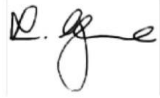
As global tourism trends evolve, we will also embrace the growing demand for sustainability and responsible tourism practices. We aim to align South Africa's offerings with the values of modern travellers, while ensuring long-term benefits for local communities and the environment. These efforts will position South Africa as a leader in sustainable tourism, reinforcing our global competitiveness.

A further priority is enhancing regional collaboration and connectivity to unlock the potential of key source markets. By working with our stakeholders to improve airlift capacity and diversifying our tourism portfolio, we aim to make South Africa more accessible to travellers towards sustainable growth in both regional and long-haul markets.

The importance of business events in propelling South Africa onto the global stage cannot be overstated. Events like Meetings Africa and Africa's Travel Indaba continue to play a vital role in showcasing our world-class capabilities. These events not only spotlight our country's offerings but also inspire increased visitor arrivals, further solidifying our position as a premier destination.

Internally, we are investing in digital transformation to enhance operational efficiency and leverage data analytics for informed decision-making. We have strengthened our operations by filling key vacancies with skilled professionals, further enhancing an already dedicated and hardworking team. As part of our commitment to excellence, we are also reviewing our organisational culture and implementing an organogram that aligns with the strategic plan to ensure seamless execution of our deliverables. This holistic approach ensures we are equipped to meet our objectives and deliver on our mandate.

As we embark on this new chapter, I extend my deepest gratitude to our dedicated team, industry partners, and our stakeholders. Your unwavering commitment is the driving force behind our success. Together, we move forward into the next five years with optimism and determination, ready to continue showcasing South Africa's incredible offerings to the world.



Ms Nombulelo Guliwe
Chief Executive Officer
South African Tourism

OFFICIAL SIGN OFF

It is hereby certified that this Five-Year Strategic Plan for the period 2025 to 2030:

- 1) Was developed by Management of South African Tourism, under the guidance of the South African Tourism Board and the Minister of Tourism.
- 2) Takes into account the relevant policies, legislation, and other mandates for which South African Tourism is responsible.
- 3) Accurately reflects the impact and outcomes which South African Tourism will endeavour to achieve over the period 2025 to 2030.



Ms Bronwen Auret
Chief Quality Assurance Officer

Date: 21/01/2025



Ms Thembisile Sehloho
Chief Marketing Officer

Date: 20/01/25



Chief Convention Bureau Officer:
DOA
Date: 30.01.2025



Mr Siyabonga Mthethwa
Chief Strategy Officer

Date: 20/01/2025



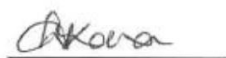
Mr. Darryl Erasmus
Chief Operating Officer

Date: 20/1/25



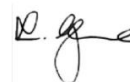
Mr Takalani Ramovha
Acting Chief Financial Officer

Date: 20/01/2025



Ms Yoland Kona
Head: Strategic Planning,
Evaluation, and Programme
Management

Date: 20/01/2025



Ms Nombulelo Guliwe
Chief Executive Officer

Date: 30.01.2025

Approved by:



Professor Gregory Davids
Chairperson, South African Tourism Board
(Accounting Authority)

Date: 30/01/2025



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

Date: 3 April 2025

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PART A: OUR MANDATE

1. CONSTITUTIONAL MANDATE

Along with the Bill of Rights, the **Constitution of the Republic of South Africa, 1996 (the Constitution)**, forms the legal foundation of a democratic South Africa, sets out the rights and duties of its citizens and defines the structure of the government. The Constitution requires that all spheres of government work together to address poverty, underdevelopment, marginalisation of individuals and communities, and other legacies of apartheid and discrimination.

Key provisions and schedules relevant to tourism include:

- Section 22: Enshrines the freedom to choose one's trade, occupation, or profession, which underpins the rights of those participating in the tourism industry, ensuring open and equitable opportunities for all South Africans.
- Section 24: Enshrines the right to a protected environment, which includes the sustainable use of natural resources, informing a focus on ensuring that tourism development is environmentally sustainable and respects South Africa's natural heritage.
- Section 41: sets out principles of cooperative governance, ensuring collaboration across spheres of government to align tourism strategies with broader developmental goals; and
- Part A of Schedule 4: Identifies tourism as a concurrent national and provincial competence, necessitating aligned efforts to enhance tourism's contribution to economic growth and social development.

2. LEGISLATIVE AND POLICY MANDATES

Where the Constitution provides the broad context to the mandate of South African Tourism, specific legislative and policy mandates are discussed below.

2.1. LEGISLATIVE MANDATE

South African Tourism is established in terms of the **Tourism Act (No. 3 of 2014)**, which aims to promote the practise of responsible tourism for the benefit of the Republic of South Africa and for the enjoyment of all its residents and foreign visitors, provide for the effective domestic and international marketing of South Africa as a tourist destination, promote quality tourism products and services, promote growth in and development of the tourism sector, and enhance cooperation and coordination between all spheres of government in developing and managing tourism.

The Tourism Act establishes South African Tourism as an entity. Chapter 3 sets out the functions of the South African Tourism Board, which are to:

- Market South Africa as a domestic and international tourist destination.
- Market South African tourism products and facilities internationally and domestically.

- Develop and implement a marketing strategy for tourism that promotes the objectives of the act.
- Advise the Minister on any other matter relating to tourism marketing.
- With the approval of the Minister, establish a National Convention Bureau in order to market South Africa as a destination for business events by:
 - Coordinating bidding for international conventions.
 - Liaising with other organs of state and suitable bodies to promote South Africa as a destination for business events.
 - Reporting to the Minister on the work of the National Convention Bureau.

The South African Tourism Board must perform any function imposed on it, in accordance with a policy directive of the Minister, and not in conflict with the act.

Further, the functions of the Tourism Grading Council of South Africa (TGCSA) have been delegated by the Minister of Tourism to the South African Tourism Board. According to Chapter 4 of the Tourism Act, a function of the TGCSA is to implement and manage the national grading system for tourism, as contemplated in Section 28.

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

The **Inter-Governmental Relations (IGR) Framework Act (No. 13 of 2005, as amended)** establishes a framework for the national government, provincial governments, and local governments to promote and facilitate intergovernmental relations, and through its regulations aims to localise and synergise objectives, targets and directives in relation to the 52 district and metropolitan spaces (IGR impact zones).

Further to the above, various legislation directs the governance and control environment and the institutional arrangements of South African Tourism. Thus, it is recognised that South African Tourism must comply with all national and provincial legislation and regulations, and all municipal bylaws, applicable to South African Tourism's functions or the areas in which it operates.

2.2. POLICY MANDATE

Where the legislation defines the scope of the mandate and regulates how South African Tourism must operate, various policy and strategy frameworks give effect to how the mandate should be implemented, and have direct bearing on the priorities and focus areas for the 2025 to 2030 period, notably:

Global and Regional Policy Alignment

South African Tourism's work is informed by key international and regional frameworks, which provide context for sustainable tourism development and regional economic integration:

- **United Nations 2030 Agenda for Sustainable Development:** Positions tourism as a key driver of economic growth, poverty reduction, and environmental conservation, with a focus on sustainable tourism practices.

- **African Union Agenda 2063:** Envisions a prosperous and integrated Africa through equitable social, economic, and technological transformation. Tourism is identified as a key sector for promoting cultural heritage, fostering pan-African unity, and advancing regional development.
- **Southern African Development Community Vision 2050 and Regional Indicative Strategic Development Plan 2020-2030:** Focuses on long-term regional development, driven by industrialisation, infrastructure development, and human capital growth. Tourism is a priority sector for regional integration, economic diversification, and creating employment opportunities across Southern Africa.

National Development Framework

At a national level, South African Tourism responds to South Africa's long-term development goals:

- **National Development Plan Vision 2030 (NDP):** The NDP serves as South Africa's blueprint for eliminating poverty, reducing inequality, and reducing unemployment by 2030. It emphasises tourism as a priority sector that generates employment, promotes inclusive growth, and enhances social cohesion. The NDP focuses on empowering marginalised groups, including women, youth, and persons with disabilities, and ensuring that tourism contributes to socio-economic upliftment.
- **GNU Priorities for 2024-2029:** Following the 2024 elections, the GNU laid out its foundational principles and priorities for the seventh administration. These priorities include rapid and inclusive economic growth, social justice, investment in people, local government stabilisation, strengthening state capacity, enhancing law enforcement and national security, enhancing social cohesion, and advancing a foreign policy rooted in human rights, international cooperation and advancing South Africa's interests.
- Informed by the Indlulamithi Scenarios 2035 processes and the evaluative reviews conducted on the NDP, 30 Years of Democracy, and 2019-2024 period, the **Medium-Term Development Plan (MTDP) 2024-2029** aligns with the GNU priorities and integrates these into the government planning system, in pursuit of the NDP's 2030 goals. The MTDP 2024-2029 serves as the bridge between the long-term aspirations of the NDP and the actionable, immediate interventions required to address the country's socio-economic challenges. It positions tourism as an essential component of inclusive growth, poverty reduction, and state development, ensuring that efforts align with South Africa's broader development agenda.
- While indirectly contributing to MTDP Priority 2: Reducing Poverty and Tackling the High Cost of Living and MTDP Priority 3: Building a Capable, Ethical, and Developmental State, the work and focus of South African Tourism is directly aligned to **MTDP Priority 1: Inclusive Growth and Job Creation** by promoting tourism as a labour-intensive sector and enhancing the tourism sector's contribution to economic growth. South African Tourism is also dedicated to promoting the rights of women, youth, children, and persons with disabilities, ensuring their full participation in the economy.
- The **Economic Reconstruction and Recovery Plan (ERRP)**, published in late 2020, is the country's plan for overall economic recovery after the COVID-19 pandemic. The ERRP identifies the eight priority interventions to drive the reconstruction and recovery of the South African economy, which includes support for tourism recovery and growth.

Sectoral Policy Alignment

Tourism's development in South Africa is further guided by sector-specific policies that aim to ensure growth, inclusivity, and sustainability within the sector, notably:

- **White Paper on the Development and Promotion of Tourism in South Africa (1996):** Provides a framework and guidelines for tourism development and promotion in South Africa. The White Paper 2024 was gazetted on 4th October 2024.
- **Green Paper on the Development and Promotion of Tourism in South Africa (2023):** outlines a strategy for boosting inclusive and sustainable tourism growth, job creation, and economic contributions in South Africa. Key focus areas include:
 - Strengthening governance, safety measures, and transformation in the tourism sector.
 - Embracing technology, crisis management, enhancing visitor services, and ensuring ease of access (including immigration and transport policies).
 - Focusing on rural and peri-urban tourism, stimulating domestic tourism for resilience, and effective destination marketing and branding.
 - Advancing responsible tourism, research, knowledge management, tourism diplomacy, and investment in the sector.
 - Key elements include establishing a regulatory environment conducive to technological development, creating a tourism safety response programme, implementing Tourism B-BBEE codes for access to finance, and regulating short-term rental accommodation to ensure policy certainty.
- **National Tourism Sector Strategy (NTSS) 2016-2026:** The NTSS provides a strategic framework for the growth of a “rapidly growing, inclusive, and sustainable tourism economy,” leveraging the country’s natural beauty, cultural diversity, and heritage. Key focus areas include:
 - Ease of access: Improving access for tourists through visa reforms, better transport connectivity, and enhanced infrastructure.
 - Visitor experience: Ensuring that visitor safety, satisfaction, and high-quality services are at the forefront.
 - Destination management and marketing: Positioning South Africa effectively in global and regional markets to attract more visitors.
 - Broad-based benefits and transformation: Promoting inclusive growth within the tourism sector, ensuring opportunities for previously disadvantaged groups.
 - Effective marketing and coordination: Enhancing collaboration between stakeholders and implementing coordinated marketing campaigns to drive demand.
- **Tourism Sector Masterplan, 2023 (TSMP):** The TSMP builds on the foundations laid by the NTSS and is designed to provide an updated, action-oriented roadmap to further position South Africa as a competitive, resilient, and inclusive tourism destination. It incorporates the objectives of the NTSS and aligns with the national development goals set out in the NDP. The TSMP is structured around three strategic pillars:

- Protect and rejuvenate tourism supply: Ensuring the sustainability of tourism offerings by improving product quality; developing new tourism routes, especially in rural and peri-urban areas; and investing in the enhancement of tourism infrastructure to attract and retain visitors.
- Reignite demand: Targeted marketing initiatives to stimulate tourism demand domestically, regionally, and internationally. This includes campaigns to attract business events, seasonal tourism activities, and cultural experiences that showcase South Africa's unique offerings.
- Strengthen enabling capability for long-term sustainability: Building the capacity of stakeholders within the tourism sector through skills development, improved tourism governance, technological innovation, and partnerships that drive sustainable growth.
- In addition, the TSMP outlines strategic interventions and enablers designed to ensure effective implementation:
 - Strategic interventions include measures to boost demand, enhance the quality of tourism products, and improve sector competitiveness.
 - Enablers focus on building partnerships, enhancing policy and regulatory environments, and ensuring sector-wide coordination for growth and sustainability.
- **Tourism B-BBEE Charter (the Charter):** The Charter seeks to transform the tourism sector by promoting equitable economic opportunities and empowering historically disadvantaged individuals and communities. The Charter provides a framework for implementing B-BBEE principles within tourism, focusing on:
 - Enterprise and supplier development: Encouraging the participation of Black-owned businesses within the tourism value chain.
 - Skills development: Ensuring the upskilling of disadvantaged groups for improved employment and entrepreneurial opportunities.
 - Socio-economic development: Contributing to community-based tourism projects and initiatives that benefit local populations. The Charter aligns with broader B-BBEE policies to ensure that growth within tourism is inclusive, creating opportunities for entrepreneurship, employment, and ownership for marginalised groups.
- **TGCSA grading criteria:** As part of the Tourism Act, the TGCSA is responsible for establishing and maintaining the country's official grading system for tourism establishments. The grading criteria focuses on:
 - Quality and service standards: Establishing clear criteria to assess the quality of accommodation and tourism services.
 - Enhancing visitor experiences: Providing standardised ratings that inform tourists about the level of service, amenities, and facilities they can expect.
 - Uplifting sector competitiveness: Ensuring that South African tourism establishments maintain global standards, enhancing the country's attractiveness as a tourism destination. The TGCSA's grading system contributes to improving and maintaining the reputation of South Africa as a premier tourism destination by setting standards that tourism businesses are encouraged to meet or exceed.

3. INSTITUTIONAL POLICIES AND STRATEGIES GOVERNING THE FIVE-YEAR PLANNING PERIOD

In addition to its alignment to global, national and sectoral policies and strategies, key institutional policies and strategies direct the focus and priorities of South African Tourism over the 2025 to 2030 period:

Minister's Delivery Agreement Commitments, 2024

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

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

South African Tourism Long-Term Corporate Strategy, 2024

The South African Tourism Long-Term Corporate Strategy provides a 15-year roadmap guiding the organisation's strategic priorities and aligning with the National Development Plan and key policy frameworks. Spanning 2025 to 2040, the strategy defines South African Tourism's vision to position the country as a leading global destination by:

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

This Five-Year Strategic Plan for 2025-2030 represents the first phase of the long-term strategy, focusing on laying the groundwork for sustained growth and achieving measurable progress toward the 2040 vision.

South African Tourism Market Prioritisation and Investment Framework, 2024

The Market Prioritisation and Investment Framework (MPIF) is a strategic tool used by South African Tourism to optimise its marketing investments across priority source markets. The framework is periodically reviewed to ensure it remains relevant and effectively aligned with the goal of achieving sustainable tourism growth by 2030.

The MPIF is designed to:

- Identify and segment markets based on their potential for tourism growth.
- Provide a strategic basis for allocating marketing resources in a way that maximises return on investment.

- Achieve the long-term objectives of increasing arrivals, spend per tourist, and overall market share for South Africa's tourism sector.

The MPIF uses a mix of qualitative and quantitative metrics to assess and categorise markets, and analyses:

- Market attractiveness: Factors, such as GDP, outbound travel demand, disposable income, and overall potential for growth in tourism.
- South Africa's ability to win: Evaluates the country's competitive position, connectivity, brand awareness, and the ease of travel, ensuring South Africa can capture a meaningful share of the outbound market.
- Return on investment: The cost-effectiveness of marketing activities in each market, aligning with goals to maximise economic return and increase tourism spend.

The MPIF segments markets into three distinct categories based on their characteristics and strategic importance to South African Tourism:

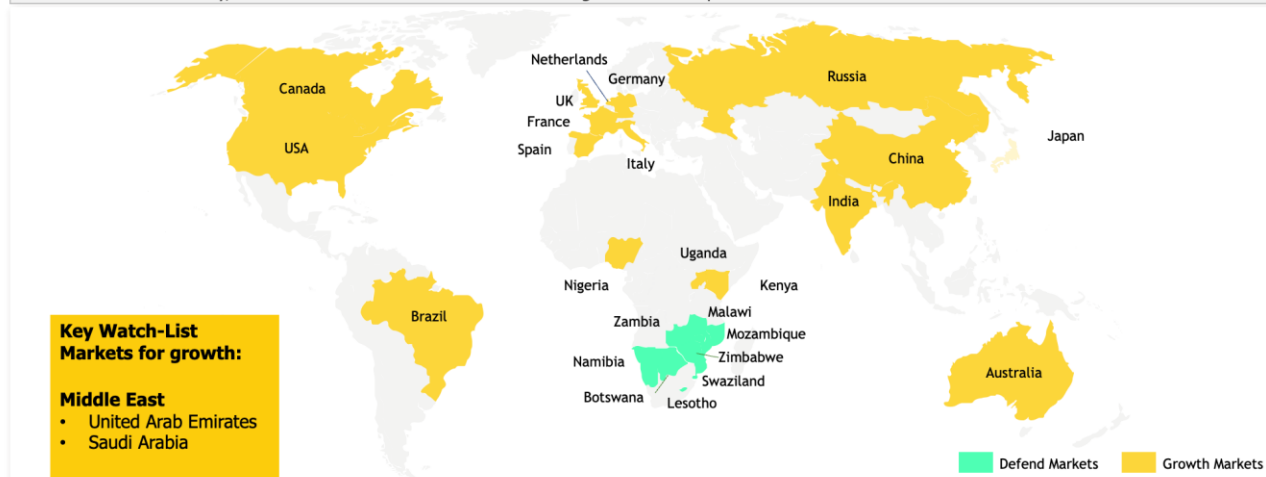
- Defend markets: These are markets where South Africa holds a significant share of arrivals. The key objective is to sustain and defend this share to ensure stable tourism revenue and volume. Investments focus on maintaining market presence, strengthening partnerships, and ensuring continued growth in tourist arrivals and spend.
- Growth markets: These markets hold strong outbound tourism potential where South Africa's share is currently lower but offers opportunities for growth. The goal is to increase South Africa's market share through targeted marketing efforts. The focus is to elevate South Africa's visibility and competitiveness relative to other long-haul destinations, focusing on product development, enhancing visitor experiences, and strategic partnerships.
- Watch-list markets: These markets present emerging opportunities but currently account for a smaller share of South Africa's tourism arrivals. While not a primary focus for immediate marketing investment, they are monitored closely for future growth potential. The focus is to track market trends and outbound potential to identify opportunities for investment and growth in the medium to long term.

The MPIF provides an adaptable approach to budget allocation, allowing South African Tourism to dynamically invest in high-impact opportunities. The focus is on activated growth through targeted interventions and baseline growth in markets that naturally align with South Africa's tourism offering.

The defend and growth markets are as follows:

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

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



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

Despite South Africa's rich tourism offerings, the country has faced challenges in maintaining its global competitiveness. To address these challenges:

- There is an urgent need to reaffirm South Africa's destination brand by emphasising its distinctiveness and appeal.
- Developing a unified messaging framework across all tourism stakeholders is essential for presenting a cohesive brand identity in international markets.
- The '5Cs' concept - collaboration, coordination, consistency, communication, and commitment - will guide efforts to enhance project activation and stakeholder engagement.

By aligning efforts across government and industry, South African Tourism can maximise its impact, drive sustainable growth, and reclaim its position as a leading global tourism destination.

4. RELEVANT COURT RULINGS

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

PART B: OUR STRATEGIC FOCUS

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

1. VISION

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

2. MISSION

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

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

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

3. VALUES

South African Tourism subscribes to the following organisational values, informed by the Batho Pele principles:

Integrity	We do things consistently, ethically, and honestly, regardless of the circumstances.
Respect	We treat everyone with utmost dignity, inclusiveness, openness and tolerance, and act with appreciation of diversity.
Authentic caring	We show and act with genuine care to each other, customers, stakeholders, partners, suppliers and the business.
Responsibility	We take personal accountability for delivering work that exceeds customers' and stakeholders' expectations.

Excellence	We take pride in, and commit to, always meeting and exceeding our customers' and stakeholders' expectations with outstanding quality.
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4. SITUATIONAL ANALYSIS

South African Tourism executes its responsibilities in a complex environment, impacted by global, regional and national events which directly or indirectly affect the delivery of its mandate. This section reflects on key macro and sectoral trends and internal environmental factors, together informing and giving context to the development of the Five-Year Strategic Plan for the period 2025 to 2030.

4.1. EXTERNAL ENVIRONMENT ANALYSIS

Global Tourism Outlook

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

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

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

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

Outlook for Tourism in South Africa

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

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

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

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

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

- **Eco-conscious and experiential accommodations:** Hospitality brands are increasingly integrating eco-friendly designs and self-sustaining accommodation that appeal to consumers prioritising sustainability and unique experiences. This trend reflects the growing desire for immersive and environmentally conscious travel.
- **Rise of micro-cations:** Short, activity-packed getaways (micro-cations) are gaining popularity due to busy schedules and the desire for cost-effective trips. These offer frequent escapes while minimising environmental impact, appealing to diverse traveller demographics.
- **Enhanced traveller well-being:** The focus on traveller well-being has increased, with innovations designed to reduce health anxiety and improve comfort. Brands are prioritising holistic travel experiences that cater to physical and emotional well-being, including jet lag remedies and child-friendly programmes.
- **Inclusivity in travel:** There is a significant emphasis on creating accessible and inclusive travel experiences for a wide range of demographics, including individuals with disabilities, LGBTQIA+ travellers, and diverse ethnic groups. This trend focuses on offering empowering, equitable travel options.
- **Integration of Web3 and smart technologies:** The adoption of technologies like Metaverse, non-fungible tokens, and AI-driven tools is reshaping the tourism industry. These innovations are enhancing personalised travel planning and real-time engagement with travellers, signalling a shift towards a more digitally integrated travel experience.

- **Transformative and mindful travel experiences:** Consumers are seeking travel opportunities that promote emotional growth and mindfulness. This includes meditation retreats and self-discovery journeys, with an increasing preference for meaningful escapism.

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

Additionally, South Africa is well-placed to leverage opportunities in the Meetings, Incentives, Conferences, and Exhibitions (MICE) Sector. The country's world-class facilities, combined with its strategic geographic position, make it an attractive destination for business events, largescale conferences, and international exhibitions. This segment is expected to play a key role in diversifying the tourism portfolio and ensuring year-round demand.

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

PESTEL Analysis

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

FACTOR	GLOBAL CONTEXT	SOUTH AFRICAN CONTEXT
Political	<ul style="list-style-type: none"> ▪ Rising nationalism, protectionist policies, and political instability are impacting international travel. ▪ Elections and policy shifts: The year 2024 has been marked by significant elections worldwide, resulting in political shifts that may affect travel policies and international relations. Notably, Donald Trump's victory in the US presidential election introduces potential changes in US foreign policy and international travel regulations. ▪ Trade policies and geopolitical tensions, such as the US-China trade war, disrupt global supply chains, including those in tourism and hospitality. 	<ul style="list-style-type: none"> ▪ The GNU, formed after the 2024 elections, creates hope for balanced governance but raises concerns over internal tensions and policy inconsistencies. ▪ Corruption, governance issues, and perceived political instability could damage South Africa's image as a safe and attractive tourist destination.
Economic	<ul style="list-style-type: none"> ▪ Post-pandemic global economic recovery remains uneven, with growth 	<ul style="list-style-type: none"> ▪ South Africa's economic situation is fragile, marked by high unemployment,

FACTOR	GLOBAL CONTEXT	SOUTH AFRICAN CONTEXT
	<p>in the US, India, and Brazil, but slower recovery in East Asia.</p> <ul style="list-style-type: none"> Economic performance directly impacts tourism through its influence on disposable income and leisure travel budgets. Inflationary pressures and rising interest rates limit consumer spending, particularly on discretionary travel and leisure. 	<p>slow GDP growth, and a tightening fiscal policy.</p> <ul style="list-style-type: none"> The GDP contraction in early 2024 and high public debt further strain public investment, affecting tourism infrastructure development. Fiscal austerity measures limit public spending on services and infrastructure essential for tourism, affecting the country's attractiveness as a destination and the ability to develop inclusive tourism strategies.
Social	<ul style="list-style-type: none"> Misinformation and disinformation, especially around safety and health issues, are major challenges for travellers, creating apprehension about visiting certain destinations. There is an increased preference for destinations aligned with personal values, such as sustainability and responsible tourism, which is particularly strong in Western markets. 	<ul style="list-style-type: none"> South Africa grapples with social unrest, high crime rates, and inequality, which can deter tourists. Addressing these issues through improvements in public safety, infrastructure, and targeted tourism campaigns is essential. Embracing inclusive tourism policies that address social issues, like unemployment and inequality, can strengthen both domestic and international tourism markets.
Technological	<ul style="list-style-type: none"> Advanced data analytics, automation, and digital platforms are shaping traveller experiences, offering more personalised services and enabling efficient market targeting. Technologies like blockchain and the Internet of Things improve secure transactions (e.g., bookings) and provide seamless travel services (e.g., smart airports and automated hotel check-ins). 	<ul style="list-style-type: none"> South Africa has made progress in technological infrastructure, especially in urban areas, but struggles with energy and water supply security, which can affect rural tourism experiences and operational consistency. Digital platforms (e.g., e-visas and mobile bookings) and bridging technological infrastructure gaps are crucial for boosting tourism competitiveness.
Environmental	<ul style="list-style-type: none"> Climate change poses risks to tourism, with rising temperatures, extreme weather, and sea-level rise affecting popular destinations. Tourists are increasingly seeking eco-friendly travel options and destinations prioritising sustainability. 	<ul style="list-style-type: none"> Environmental challenges, such as water scarcity, extreme weather, and biodiversity loss, impact South Africa's nature-based tourism (e.g., safaris and coastal attractions). Limited government capacity for environmental conservation places responsibility on the private sector to adopt sustainable tourism practices.

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

4.2. INTERNAL ENVIRONMENTAL ANALYSIS

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

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

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

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

Organisational culture and design have been highlighted as key issues affecting the achievement of the entity's strategy. While South African Tourism has a dedicated workforce with valuable market insights, capacity constraints, skills development, and internal cohesion have impacted overall performance. A workforce that is motivated, inclusive, engaged, and aligned with strategic priorities is crucial. To this end, there will be a dedicated focus on fostering a collaborative, high-performance culture, enhancing internal communication, and ensuring that the organisational structure supports strategic delivery.

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

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

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

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

Internal Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis

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

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

PART C: MEASURING OUR PERFORMANCE

In the context of the hierarchy of performance information utilised to construct this Five-Year Strategic Plan for 2025 to 2030 through the “Theory of Change” Logic Model and, where the mandate, vision and mission describe the longer-term strategic focus of the organisation, the next level in the hierarchy is to describe the impact and the outcomes (results areas) necessary to deliver against the desired strategic focus.

1. INSTITUTIONAL PERFORMANCE INFORMATION

1.1. IMPACT STATEMENT

Informed by the legislative and policy mandates and the strategic focus, the impact statement of South African Tourism is:

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

1.2. MEASURING OUR OUTCOMES

Aligned to its mandate and strategic focus and towards its impact, four outcomes will direct the effort and focus of South African Tourism over the period to 2030.

Progress towards the outcomes will be monitored and reported on as follows:

MTDP Priority 1: Inclusive Growth and Job Creation			
<ul style="list-style-type: none"> Drive growth in tourism as a labour-intensive sector, including through the finalisation and implementation of masterplans; and Strengthen economic diplomacy with our largest trading partners and potential trading partners. 			
Outcome	Outcome Indicators	Baseline	Five-Year Target
1. Strengthened market position and tourism growth	International tourist arrivals	8.81 million as at March 2024: Leisure: 8.48 million MICE: 333.9 thousand	15 million: Leisure: 14.63 million MICE: 374.3 thousand
	International tourist spend	R95.1 billion as at March 2024: Leisure: R90.47 billion MICE: R4.63 billion	R115.2 billion: Leisure: R109.59 billion MICE: R5.61 billion
	Geographic spread of international tourist arrivals	9.7% as at March 2024	13.9%

	Domestic tourist trips	37.9 million as at March 2024	45.1 million
	Domestic tourist spend	R123 billion as at March 2024	R139.4 billion
	Geographic spread of domestic tourist arrivals	3.3% as at March 2024	4.0%
	Number of bids won (MICE)	227 as at March 2024	366
	Economic impact of bids won (MICE)	R3.9 billion as at March 2024	R6.3 billion
	South Africa Leisure Brand Strength Index	45.6 as at March 2024	51
2. Enhanced visitor experience and responsible tourism offerings	Tourist Satisfaction Rating	4.6 as at March 2024	4.8
3. Insights-led sector thought leadership and advocacy	Satisfaction Score with South African Tourism's engagement	3.5 as at March 2024	4
MTDP Priority 3: Build a capable, ethical and developmental state			
<ul style="list-style-type: none"> Improve the governance and performance of public entities. 			
4. Organisational excellence and a high-performance culture	External audit outcome	Qualified audit outcome as at August 2024	Clean audit outcome
	Staff Engagement Survey score	52.2% as at March 2023	90%
	Productivity Tracking Matrix score	New indicator: Establish baseline in FY25/26	Improvement from FY25/26 baseline

1.3. EXPLANATION OF PLANNED PERFORMANCE OVER THE FIVE-YEAR PERIOD

South African Tourism's outcomes for the 2025–2030 period are designed to deliver on its impact of driving sustainable economic growth, creating jobs, and ensuring inclusive, environmental, and cultural benefits through tourism. On the journey towards the long-term corporate strategy, the outcomes are aligned with the key policy mandates, including the MTDP, NTSS, and the TSMP.

Outcome 1: Strengthened Market Position and Tourism Growth

This outcome seeks to enhance South Africa's position as a leading global and regional destination for leisure and business tourism. By increasing market share in key source markets, South African Tourism aims to drive tourism volumes and spending, fostering sustainable economic growth, creating jobs, and promoting inclusive benefits across the tourism value chain.

Aligned with the MTDP Priority 1 of inclusive growth and job creation, the NTSS, and the TSMP, the outcome prioritises targeted marketing efforts to reignite demand for South Africa. The strategy seeks to promote geographic and seasonal diversity while empowering marginalised groups, including women, youth, and persons with disabilities, through tourism training, product promotion, and enhanced access to economic opportunities. In addition, the organisation's alignment with the District Development Model (DDM) ensures equitable tourism development across provinces, particularly in historically underrepresented regions, contributing to balanced regional growth.

Over the five-year period, South African Tourism will implement the MPIF, which segments markets into defend, growth, and watch-list categories to optimise resource allocation and maximise returns. Strategic branding efforts will focus on creating compelling narratives that differentiate South Africa from competitors. These efforts will leverage digital transformation and advanced customer relationship management systems to deliver personalised and high-impact campaigns. Catalytic events such as Africa's Travel Indaba and Meetings Africa will serve as platforms to increase market visibility, attract both leisure and business travellers, and stimulate demand across priority markets, including the MICE sector.

The successful achievement of this outcome will rely on key enablers. Strengthened partnerships with provincial tourism authorities, trade stakeholders, and airlines will be instrumental in improving air connectivity and expanding market reach. Investments in digital marketing platforms and the use of data-driven insights will enhance campaign targeting and impact. Capacity-building initiatives will focus on equipping South African Tourism staff and partners with the skills necessary to excel in digital marketing, market research, and campaign execution.

By capturing a greater market share, increasing tourist arrivals, and driving higher spending per visitor, South African Tourism aims to attract 15 million visitors by 2030. This outcome supports the broader goal of positioning South Africa as a preferred tourism destination. It ensures that the country leverages its diverse tourism offerings to remain globally competitive while advancing inclusive transformation and fostering sustainable economic development across the tourism sector. This approach will contribute to equitable growth and ensure that the benefits of tourism are shared widely, reinforcing South Africa's reputation as a destination of choice for travellers worldwide.

Outcome 2: Enhanced Visitor Experience and Responsible Tourism Offerings

Ensuring a high-quality, inclusive visitor experience is central to South African Tourism's strategic intent and aligns with the TSMP's pillars of protecting and rejuvenating tourism supply and reigniting demand, as well as the MTDP's objectives for inclusive growth. This outcome focuses on creating memorable, safe, and sustainable tourism experiences that drive repeat travel, promote equitable regional growth, and build South Africa's competitive advantage.

The organisation will prioritise improving service quality and product offerings through the TGCSA, ensuring establishments meet international standards. Key initiatives include enhancing grading criteria, aligning experiences with global benchmarks, and promoting service excellence to ensure visitors have positive and memorable interactions.

Responsible tourism practices, including environmental conservation, cultural preservation, and community engagement, will be promoted to balance economic benefits with sustainability goals. Visitor experiences will be diversified to cater to a broad range of demographics, including persons with disabilities and historically disadvantaged communities, ensuring that the sector reflects the values of inclusivity and equity. Products that empower women, youth, and persons with disabilities will be developed to meet diverse needs while advancing transformation within the sector.

Real-time digital tools will play a critical role in gathering visitor feedback, enabling continuous improvement in service delivery and shaping impactful visitor experiences. Collaborative networks with accommodation providers, local communities, and tourism enterprises will co-create high-quality tourism products. Green certifications, eco-tourism initiatives, and community-based tourism will further align South African Tourism with global sustainability trends, enhancing its value proposition and supporting the sector's resilience.

By focusing on visitor satisfaction, safety, and inclusivity, this outcome will contribute to South African Tourism's intent of inclusive and responsible tourism growth. It aims to improve tourist satisfaction, ensuring that visitors leave with positive impressions and become ambassadors for South Africa's tourism experience.

Outcome 3: Insights-Led Sector Thought Leadership and Advocacy

This outcome is geared towards building a knowledge-driven tourism sector by leveraging data, insights, and market intelligence to inform strategy and advocacy efforts. Aligned with the MTDP objectives, the NTSS's focus on knowledge management and the TSMP's objective of strengthening enabling capabilities, this outcome prioritises evidence-based advocacy to support inclusive sector growth.

By acting as a thought leader, South African Tourism aims to generate and share timely, relevant insights into market trends, visitor behaviour, and emerging sectoral challenges. These insights will guide advocacy efforts to improve the tourism environment, particularly in terms of enhancing airlift capacity, simplifying visa access, and supporting tourism sector development. As a result, South African Tourism will play an important role in contributing to conducive policies that enable tourism growth.

Recognising the need to support marginalised groups, South African Tourism's market research and advocacy will include a focus on women, youth, and persons with disabilities to highlight their contributions and needs within the tourism sector. Policy advocacy efforts will seek to promote inclusive growth opportunities for these groups, enabling them to fully participate and benefit from tourism sector developments.

The effective execution of this outcome relies on enhancing South African Tourism's data collection and analysis capabilities and engaging with both public and private sector stakeholders to promote a unified tourism development agenda. Building a collaborative network with research institutions and leveraging partnerships to advocate for supportive policies are key strategies that will drive sector advancement. This outcome will enable South African Tourism to make informed strategic decisions and advocate effectively for sustainable growth, contributing to the sector's long-term impact.

Outcome 4: Organisational Excellence and a High-Performance Culture

Achieving organisational excellence is critical for South African Tourism to deliver on its strategic intent efficiently and effectively. Aligned with the MTDP's priority of building a capable, ethical, and developmental state and the TSMP's emphasis on institutional strengthening, the organisation will

prioritise talent attraction, development, and retention. Leadership development, continuous learning, and employee wellness will drive a culture of excellence and innovation. Financial governance will be strengthened through unqualified audit outcomes, supported by enhanced budget planning and resource optimisation.

Operationally, South African Tourism will enhance its internal systems and processes, leveraging technology to streamline workflows and improve service delivery. Investing in robust performance management systems, automating manual processes, and fostering innovation within teams will contribute to improving organisational efficiency and effectiveness. Creating an environment where women, youth, and persons with disabilities are well-represented across all organisational levels is integral to achieving a balanced and inclusive workforce.

This outcome underpins all other outcomes by ensuring that South African Tourism operates as a high-performing organisation capable of implementing its strategic focus effectively. The result will be improved service delivery, efficient resource utilisation, and a solid foundation to support South African Tourism's broader impact of sustainable tourism growth and economic development.

2. KEY RISKS AND MITIGATIONS

The risks to the achievement of the outcomes are identified as follows:

OUTCOME	KEY RISKS	RISK MITIGATION
1. Strengthened market position and tourism growth	<ul style="list-style-type: none"> ▪ Global economic volatility: Economic downturns, inflation, and currency fluctuations may impact tourism spend and travel budgets, affecting growth targets. ▪ Limited budget and resources: Budget constraints and resource limitations may hinder effective marketing and brand-building efforts. ▪ Increased competition: Competing destinations, both in Africa and globally, are enhancing their tourism offerings, creating intense competition for market share. ▪ Travel barriers: Air connectivity issues, travel restrictions, and complex visa processes may reduce tourist arrivals from key markets. 	<ul style="list-style-type: none"> ▪ Use the MPIF to prioritise high-impact marketing activities in defend and growth markets, ensuring efficient use of limited resources. ▪ Emphasise South Africa's unique tourism experiences, leveraging sustainability and community-based tourism as differentiators. ▪ Continuously innovate brand messaging to maintain market appeal. ▪ Work closely with airlines to enhance direct connectivity. ▪ Advocate for policy reforms to streamline visa processes and improve ease of travel to South Africa.
2. Enhanced visitor experience and	<ul style="list-style-type: none"> ▪ Safety and security concerns: Issues around crime, social unrest, and health risks could 	<ul style="list-style-type: none"> ▪ Implement proactive communication strategies to

OUTCOME	KEY RISKS	RISK MITIGATION
responsible tourism offerings	<p>negatively impact the visitor experience and South Africa's brand image.</p> <ul style="list-style-type: none"> ▪ Operational inefficiencies: Delays in service delivery, inconsistent tourism standards, and poor infrastructure may reduce visitor satisfaction and competitiveness. ▪ Limited capacity for responsible tourism initiatives: Insufficient investment in sustainable and community-based tourism can limit the appeal for eco-conscious travellers and responsible tourism growth. 	<p>manage perceptions and promote positive narratives.</p> <ul style="list-style-type: none"> ▪ Improve tourism grading criteria through the TGCSA and ensure consistent service standards across the sector. ▪ Support responsible tourism practices for local businesses. ▪ Promote experiences that align with global sustainability trends, like nature reserves, cultural heritage sites, and eco-friendly accommodation.
3. Insights-led sector thought leadership and advocacy	<ul style="list-style-type: none"> ▪ Data gaps and a lack of timely market insights: Insufficient or outdated data on market trends, visitor behaviour, and sector performance, may limit South African Tourism's ability to make informed decisions and advocate effectively. ▪ Fragmented stakeholder coordination: Inconsistent collaboration and communication among stakeholders, including government departments and private partners, may hinder policy advocacy and market growth. 	<ul style="list-style-type: none"> ▪ Implement advanced data management systems for real-time analytics, improving market insights and enabling agile decision-making. ▪ Develop partnerships with research institutions and data providers for comprehensive sector intelligence. ▪ Establish regular communication forums and collaborative platforms to ensure coherent brand advocacy.
4. Organisational excellence and a high-performance culture	<ul style="list-style-type: none"> ▪ Skills gaps and talent retention challenges: Insufficient skills in key areas, such as digital marketing, technology use, and data analytics, may hinder organisational performance. Retaining high-performing staff can be difficult in a competitive talent market. ▪ Governance and process inefficiencies: Outdated internal systems, fragmented workflows, 	<ul style="list-style-type: none"> ▪ Implement comprehensive training programmes for staff development in key skills areas. ▪ Develop a culture of recognition, inclusion, and development to enhance staff retention and build a diverse talent pipeline. ▪ Develop clear performance management systems and implement best practices in governance.

OUTCOME	KEY RISKS	RISK MITIGATION
	<p>and delayed decision-making, may affect operational efficiency and delivery against strategic objectives.</p> <ul style="list-style-type: none"> ▪ Limited technological integration: Low adoption of digital tools and outdated ICT infrastructure limit operational capacity and hinder effective service delivery. 	<ul style="list-style-type: none"> ▪ Invest in upgrading ICT systems and integrating digital solutions across all operations to improve efficiency and enhance service delivery. ▪ Adopt digital collaboration tools and data-driven decision-making platforms to build a high-performance culture. ▪ Review and optimise internal processes to enhance agility and efficiency.

3. PUBLIC ENTITIES

South African Tourism does not have any public entities.

PART D: TECHNICAL INDICATOR DESCRIPTIONS

Indicator Title	International tourist arrivals
Definition	An international tourist stays at least one night in the country visited. Destination South Africa seeks growth in the number of international tourist arrivals.
Source of data	<ul style="list-style-type: none"> ▪ South African Tourism's Departure Survey ▪ Statistics South Africa P0351 Tourism and Migration Report.
Method of calculation or assessment	Tourist Arrivals: <ul style="list-style-type: none"> ▪ Calculated as the cumulative month-on-month total of arrivals by source market. ▪ Data sourced from Statistics South Africa's P0351 Tourism and Migration Report. ▪ Growth is assessed by comparing international tourist arrivals to a baseline.
Assumptions	<ul style="list-style-type: none"> ▪ International travel is not prohibited. ▪ South Africa's competitiveness as a destination improves. ▪ Statistics South Africa publishes accurate statistics on tourist arrivals.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Desired performance	Performance higher than planned target.
Indicator responsibility	<ul style="list-style-type: none"> ▪ Chief Operating Officer is responsible for international leisure tourist arrivals. ▪ Chief Convention Bureau Officer is responsible for international MICE arrivals.

Indicator Title	International tourist spend
Definition	The amount spent directly in South Africa by all international tourists, excluding amounts spent on capital goods, for the duration of their stay in South Africa. Destination South Africa seeks growth in the spend by international tourists, as a contribution to the country's economy.
Source of data	<ul style="list-style-type: none"> ▪ South African Tourism's Departure Survey. ▪ Statistics South Africa P0351 Tourism and Migration Report.
Method of calculation or assessment	Data is collected through monthly surveys and weighted using Statistics South Africa's P0351 Tourism and Migration Report. Growth in spend is compared to a baseline. Surveys are conducted monthly at major airports (ORTIA, CTIA) and 10 land border posts, targeting departure lounges at airports and three points at land border posts. Sampling is proportional to actual arrivals each month.

	Weighting and Calculation: <ul style="list-style-type: none"> ▪ Spend: The average spend per tourist is calculated using the weighted dataset based on responses to the question, “How much was spent in South Africa?” for the number of days spent in the country. ▪ Quarterly Analysis: Spend data is calculated quarterly and becomes available three months after the quarter ends. ▪ Growth Analysis: Growth in international tourist spend is measured against the baseline.
Assumptions	<ul style="list-style-type: none"> ▪ International travel is not prohibited. ▪ There are no adverse impact by any natural or health disasters. ▪ South Africa’s competitiveness as a destination improves. ▪ Statistics South Africa publishes accurate statistics on tourist arrivals. ▪ A valid agreement exists between South African Tourism and the Airports Company South Africa and the Border Management Authority allowing for the collection of data.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Desired performance	Performance higher than planned target.
Indicator responsibility	<ul style="list-style-type: none"> ▪ Chief Operating Officer is responsible for international leisure spend. ▪ Chief Convention Bureau Officer is responsible for international MICE spend.

Indicator Title	Geographic spread of international tourist arrivals
Definition	Geographic spread of international tourist arrivals is a measure of the distribution of travellers across the nine provinces. South African Tourism seeks increased geographic spread of international tourist arrivals.
Source of data	South African Tourism’s Departure Survey.
Method of calculation or assessment	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.
Assumptions	Tourists are interested in visiting more than one province.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	All nine provinces in South Africa.

Desired performance	Performance higher than planned target.
Indicator responsibility	Chief Operating Officer.

Indicator Title	Domestic tourist trips
Definition	A domestic tourist trip is one taken within the borders of South Africa, by an adult resident in South Africa, for the main purpose of a holiday, where travel exceeds 40 kilometres from his/her place of residence. South African Tourism seeks growth in the number of domestic tourist trips.
Source of data	<ul style="list-style-type: none"> ▪ South African Tourism's Domestic Tourism Survey. ▪ Statistics South Africa Population Report.
Method of calculation or assessment	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 Statistics South Africa's population estimates. Using the Statistical Package for the Social Sciences System, the number of domestic trips is calculated 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?" Results of the survey are available three months after the reported month. The growth in domestic tourist trips is compared to the baseline.
Assumptions	<ul style="list-style-type: none"> ▪ The economy of South Africa improves, as it directly impacts discretionary income available for its residents to spend on holidays. ▪ The tourism industry develops packages and price-points that suit the domestic market and offers deals to domestic tourists, as this is a catalyst for domestic holiday travel.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Desired performance	Performance higher than planned target.
Indicator responsibility	Chief Operating Officer.

Indicator Title	Domestic tourist spend
Definition	Growth in domestic tourist spend refers to the money spent on tourism-related activities by an adult resident for holiday trips taken within the borders of South Africa. South African Tourism seeks growth in domestic tourist spend.
Source of data	<ul style="list-style-type: none"> ▪ South African Tourism's Domestic Tourism Survey.

	<ul style="list-style-type: none"> Statistics South Africa Population Report.
Method of calculation or assessment	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 Statistics South Africa's population estimates. Using the Statistical Package for the Social Sciences System, the number of domestic trips is calculated 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?" Spend can only be calculated on a quarterly basis and is only available three months after the reported quarter. The growth in domestic tourist spend is compared to the baseline.
Assumptions	<ul style="list-style-type: none"> The economy of South Africa improves, as it directly impacts discretionary income available for its residents to spend on holidays. The tourism industry develops packages and price-points that suit the domestic market and offers deals to domestic tourists, as this is a catalyst for domestic holiday travel.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Desired performance	Performance higher than planned target.
Indicator responsibility	Chief Operating Officer.

Indicator Title	Geographic spread of domestic tourist arrivals
Definition	Geographic spread of domestic tourist arrivals is a measure of the distribution of travellers across the nine provinces. South African Tourism seeks increased geographic spread of domestic tourist arrivals.
Source of data	South African Tourism's Domestic Tourism Survey.
Method of calculation or assessment	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.
Assumptions	<ul style="list-style-type: none"> The economy of South Africa improves, as it directly impacts discretionary income available for its residents for spend on holidays. Tourists are interested in visiting more than one province.
Disaggregation of beneficiaries (where applicable)	Not applicable.

Spatial transformation (where applicable)	All nine provinces in South Africa.
Desired performance	Performance higher than planned target.
Indicator responsibility	Chief Operating Officer.

Indicator Title	Number of bids won (MICE)
Definition	The number of bids won is the total of Meetings, Incentives, Conferences and Exhibitions (MICE) bids secured.
Source of data	<ul style="list-style-type: none"> South Africa National Convention Bureau Bidding Data Dashboard
Method of calculation or assessment	The South Africa National Convention Bureau collects data on bids submitted through the Bid Support Programme. The data collected includes the total number of bid submissions including the number of submissions secured.
Assumptions	<ul style="list-style-type: none"> MICE are not adversely impacted by any natural or health disasters. International travel is not prohibited. South Africa's competitiveness as a destination improves. Statistics South Africa publishes accurate statistics on tourist arrivals
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Desired performance	Performance higher than planned target.
Indicator responsibility	Chief Convention Bureau Officer.

Indicator Title	Economic Impact of bids won (MICE)
Definition	The economic impact of bids won is the total of Meetings, Incentives, Conferences and Exhibitions (MICE) bids secured estimated economic value.
Source of data	<ul style="list-style-type: none"> South Africa National Convention Bureau Bidding Data Dashboard
Method of calculation or assessment	The South Africa National Convention Bureau collects data on bids submitted through the Bid Support Programme. The data collected includes the total number of bid submissions including the number of submissions secured and economic value of those bids.
Assumptions	<ul style="list-style-type: none"> MICE are not adversely impacted by any natural or health disasters. International travel is not prohibited. South Africa's competitiveness as a destination improves. Statistics South Africa publishes accurate statistics on tourist arrivals

Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Desired performance	Performance higher than planned target.
Indicator responsibility	Chief Convention Bureau Officer.

Indicator Title	South Africa's Leisure Brand Strength Index
Definition	Brand strength is the efficacy of a brand's performance on intangible measures relative to its competitors. The brand strength index considers the functional and emotional attributes of the brand, which are considered to be intangible measures, including brand reach, and predicts arrivals by assessing the impact of brand metrics across the conversion funnel. The conversion funnel considers the potential visitor's journey which begins when a visitor discovers the destination and ends when the visitor either loses interest in the destination or converts into a buyer. As an all-encompassing measure of brand performance, South African Tourism seeks improvement in the destination's brand strength index.
Source of data	South African Tourism's International Brand Tracker.
Method of calculation or assessment	The brand strength index is determined through an international brand tracker survey across MPIF markets. The brand strength index is calculated on normalised data for various attributes and is represented on a 0 to 100 scale. An index of 100% is absolute brand strength, while 0% is no brand strength.
Assumptions	<ul style="list-style-type: none"> There will not be any significant adverse events that will negatively impact the destination brand. The destination brand strength will improve over time.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Desired performance	Performance higher than planned target.
Indicator responsibility	Chief Marketing Officer.

Indicator Title	Tourist Satisfaction Rating
Definition	The Tourist Satisfaction Rating measures the overall enjoyment and fulfilment of tourists from their holiday experiences within the country. The projected increase in the Tourist Satisfaction Rating reflects the anticipated level of contentment

	experienced by travellers visiting South Africa. South African Tourism seeks an improvement in the Tourist Satisfaction Rating.
Source of data	South African Tourism's Departure Survey.
Method of calculation or assessment	Tourist satisfaction is assessed by comparing average satisfaction ratings collected from South African Tourism's Departure Survey on various satisfaction criteria (e.g., accommodation, safety and security, tour guides, etc.). The rating is represented on a 0 to 5 scale.
Assumptions	Tourist satisfaction levels will continue to improve with the enhancement and diversification of tourism products and offerings.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Desired performance	Performance higher than planned target.
Indicator responsibility	Chief Quality Assurance Officer.

Indicator Title	Satisfaction Score with South African Tourism 's Engagement
Definition	The Satisfaction Score with South African Tourism's Engagement is a metric used to evaluate how satisfied stakeholders, partners, and/or the public are with their interactions and overall experiences with South African Tourism. This score reflects the effectiveness, quality, and responsiveness of the organisation's engagement efforts. It serves as an important indicator of how well South African Tourism fosters positive relationships and meets the expectations of its stakeholders. South African Tourism seeks an improvement in Satisfaction Score with South African Tourism's Engagement.
Source of data	South African Tourism's Corporate Reputation Index Survey Report.
Method of calculation or assessment	The satisfaction score is calculated by averaging feedback from the South African Tourism's Corporate Reputation Index Survey, where respondents rate their experience with the organisation's engagement. This score is then compared to a set target to assess performance. The rating is represented on a 0 to 5 scale.
Assumptions	<ul style="list-style-type: none"> Stakeholder satisfaction levels will continue to improve through South African Tourism's efforts to collaborate effectively with key stakeholders across the tourism value chain. Stakeholders are willing to participate in the survey.
Disaggregation of beneficiaries (where applicable)	Not applicable.

Spatial transformation (where applicable)	Not applicable.
Desired performance	Performance higher than planned target.
Indicator responsibility	Chief Executive Officer.

Indicator Title	External audit outcome
Definition	The external audit outcome is an opinion issued to South African Tourism by the Auditor-General of South Africa, based on its annual audit on the quality of financial statements, performance information, and compliance with key legislation.
Source of data	External Audit Report from the Auditor-General of South Africa.
Method of calculation or assessment	Assess the audit outcome as part of the annual Auditor-General's Report.
Assumptions	<ul style="list-style-type: none"> ▪ Sound internal control and governance environment will lead to an improved audit outcome. ▪ Effective audit procedures by the Auditor-General when conducting annual audits.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Desired performance	Achievement of target as planned.
Indicator responsibility	Chief Financial Officer.

Indicator Title	Staff Engagement Survey score
Definition	A staff engagement survey is a structured assessment used by organisations to measure and evaluate the level of employee engagement within the workplace. It may consist of a series of questions designed to gather feedback and insights from employees about leadership, team effectiveness, work outputs, business enablement, reward and recognition, and wellbeing. The results of staff engagement surveys are used by South African Tourism to identify areas for improvement and develop strategies to enhance employee engagement, productivity, and retention. South African Tourism seeks an improvement in the staff engagement survey score.
Source of data	Staff engagement survey reports.
Method of calculation or assessment	Assess the improvement from the prior staff engagement survey score, as the baseline, which is based on the survey undertaken every two years.

Assumptions	Improvement plans will be implemented and will lead to an improvement in the staff engagement survey score.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Desired performance	Performance higher than planned target.
Indicator responsibility	Chief Operating Officer.

Indicator Title	Productivity Tracking Matrix score
Definition	The Productivity Tracking Matrix Score measures the effectiveness and efficiency of organisational processes and outputs in relation to resource utilisation. It is a composite indicator that may be derived from key performance areas, such as cost-effectiveness, output quality, and resource utilisation. The score reflects improvements in productivity by comparing results year-on-year against the baseline that will be established in FY25/26.
Source of data	<ul style="list-style-type: none"> ▪ Approved Productivity Tracking Matrix. ▪ Approved Productivity Tracking Matrix Baseline Report. ▪ Periodic (monthly and/or quarterly and/or annual) productivity reports.
Method of calculation or assessment	The Productivity Tracking Matrix Score is calculated as a weighted composite score based on the defined key performance areas in the approved Productivity Tracking Matrix. The score is expressed as a single numerical value, where the baseline for FY25/26 serves as the reference point. Year-on-year changes are monitored to assess improvement over the baseline.
Assumptions	<ul style="list-style-type: none"> ▪ The Productivity Tracking Matrix will be developed, approved, and implemented effectively. ▪ Data on key performance areas will be readily available, accurately captured and reported. ▪ Productivity enhancement initiatives will lead to measurable improvements over time.
Disaggregation of beneficiaries (where applicable)	Not applicable.
Spatial transformation (where applicable)	Not applicable.
Desired performance	Performance higher than planned target.
Indicator responsibility	Chief Operating Officer.

ANNEXURES TO THE STRATEGIC PLAN

ANNEXURE A: DISTRICT DEVELOPMENT MODEL

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

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

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

ANNEXURE B: APPROACH TO SETTING AND MONITORING TARGETS

The 7th Administration's MTDP focuses on inclusive growth and job creation, with a key emphasis on boosting both international and domestic tourism. Targets are based on the MPIF, which assesses market potential and guides optimal resource allocation for sustainable tourism growth to 2030. Projections are based on statistical analysis of factors such as economic conditions, historical performance, connectivity, infrastructure, visa policies, and trade relations, amongst others.

INTERNATIONAL TARGETS

- International tourism targets aim to recover South Africa's market share lost since 2019, with a focus on **pragmatic growth**.
- Key targets include increasing international tourist arrivals from 8.81 million in FY23/24 to 14.95 million by FY29/30 (**6.3% CAGR**), with a mid-term goal of 11.9 million arrivals.
- Tourist spending is projected to rise from R95.1 billion to R115.2 billion (**2.85% CAGR**) by FY29/30, with a mid-term target of R105.9 billion.
- The entity's marketing campaigns also seek to enhance geographical spread and length of stay, particularly in rural and township areas, with **international tourist spread** increasing from 9.7% to 13.9% by FY29/30.

MICE-RELATED TARGETS

- In the MICE sector, targets include increasing Number of bids won (MICE) over five year period from 227 as March 2024 to 366 by FY29/30 (10% annual growth rate), and growing economic contribution from R3.9 billion to R6.3 billion (10% annual growth rate).

DOMESTIC TARGETS

- For domestic tourism, the plan aims to grow overnight trips from 37.9 million in FY23/24 to 45.1 million by FY29/30 (**2.5% CAGR**) through campaigns like Sho't Left, promoting geographic spread and reducing seasonality.
- Domestic tourism targets are **conservative**, considering the current economic climate, the cost of living crisis, and a slowdown after the "revenge travel" surge.
- Domestic spending is expected to increase from R123 billion to R139.4 billion (**2% CAGR**) by FY29/30, with a mid-term target of R131.4 billion.
- The entity's marketing campaigns also seek to enhance geographical spread and length of stay, particularly in rural and township areas, with **domestic spread** increasing from 3.3% to 4% by FY29/30.

BRAND STRENGTH INDEX

- The **Brand Strength Index (BSI)** is a single score that reflects how strong South Africa's tourism brand is by focusing on three key areas: affordability, stature, and awareness.
- Affordability shows how accessible South Africa feels to tourists, stature captures the emotional connection and appeal of the country's culture and attractions, and awareness measures how well-known South Africa is as a destination. These factors were chosen because they combine practical value, emotional appeal, and visibility - key drivers of tourism success.
- The BSI integrates these elements into one number on a scale of 0 to 100, providing a clear and comprehensive view of the brand's overall health. It is called an index, not a percentage, because it combines multiple aspects into a single, comparable score rather than measuring one isolated factor.
- South Africa's **Brand Strength Index (BSI)** improved by **1.8 points** from 2022 to 2023, outperforming some of our global competitors USA (1.5) and Kenya (1.4). The consistent global marketing efforts will support the aforementioned goals, with South Africa's brand strength index expected to increase from 45.6 to 51 by FY29/30.

GEOGRAPHIC SPREAD OF INTERNATIONAL TOURIST ARRIVALS

- The **Geographic Spread of International Tourist Arrivals** measures how well international travellers are distributed across South Africa's **nine provinces**.
- This indicator is calculated using data from South African Tourism's **Departure Survey**, specifically the question: "During your visit to South Africa, which provinces did you visit?".
- The result is expressed as a **percentage share** of total international arrivals for each province.
- Monitoring geographic spread aligns with South African Tourism's goal of increasing tourism distribution beyond key provinces to ensure balanced growth across all provinces.

GEOGRAPHIC SPREAD OF DOMESTIC TOURIST ARRIVALS

- The **Geographic Spread of Domestic Tourist Arrivals** measures how domestic travellers are distributed across South Africa's **nine provinces**.
- This indicator is calculated using data from South African Tourism's **Domestic Tourism Survey**, specifically the questions: "In the past month, how many trips did you take?" and "Of those trips, which provinces did you visit?".
- The results are expressed as a **percentage share** of total domestic trips for each province.
- This measure supports South African Tourism's goal of increasing tourism distribution to ensure all provinces benefit from domestic travel.

Progress towards targets is monitored monthly and quarterly, whilst official reporting on all targets is undertaken annually as part of the Annual Report for each financial year.

ANNEXURE C: ABBREVIATIONS

AI	Artificial Intelligence
B-BBEE	Broad-Based Black Economic Empowerment
COVID-19	Novel Coronavirus Disease, 2019
ERRP	Economic Reconstruction and Recovery Plan
GDP	Gross Domestic Product
GNU	Government of National Unity
ICT	Information and Communication Technology
IGR	Inter-Governmental Relations
LGBTQIA+	Lesbian, Gay, Bi-sexual, Transgender, Queer and Questioning, Intersex, Asexual, and more
MICE	Meetings, Incentives, Conferences and Exhibitions
MPIF	Market Prioritisation and Investment Framework
MTDP	Medium-Term Development Plan
NDP	National Development Plan
NTSS	National Tourism Sector Strategy 2016-2026
PESTEL	Political, Economic, Social, Technological, Environmental, and Legal
PFMA	Public Finance Management Act
SDG	Sustainable Development Goal (United Nations, 2015)
SMME	Small, Medium, and Micro Enterprise
SWOT	Strengths, Weaknesses, Opportunities and Threats
TGCSA	Tourism Grading Council of South Africa
The Charter	Tourism Broad-Based Black Economic Empowerment Charter
The Constitution	Constitution of the Republic of South Africa, 1996
The Minister	Honourable Patricia de Lille, MP
TSMP	Tourism Sector Masterplan
US/USA	United States of America
USD	United States of America Dollars