

Gauteng Tourism Authority

Annual Performance Plan

FY2024/25



Executive Authority Statement

The year 2023/24 FY draws us near the end of the 6th administration; this implies that Gauteng Department of Economic Development (GDED) and its entities must hasten efforts toward accelerated service delivery and continue to inculcate the discipline of implementation until the end of term.

It is noteworthy to mention that during the 22/23 Financial year, the Gauteng Provincial Government welcomed its 7th Premier and Executive Council and from the onset, the Premier and EXCO set the province's agenda for the remainder of the MTSF period which seeks to reaffirm its commitment to realising the goals of the National Development Plan (NDP) 2030, which serves as an action plan for securing the future of South Africans as charted in the Constitution.

For the golden province, the Growing Gauteng Together (GGT) 2030 vision serve as our blueprint in to achieve heightened economic recovery, sustainable jobs, reindustrialisation and be on par with the demands of the share economy. Underpinning this vision is the deliberate stimulation and catalysation of the key 10 high-growth sectors in Gauteng using a social-compacting by like-partners in development to dial-up implementation.

The 6th administration introduced the elevated provincial government priorities to accelerate the creation of a growing and developmental Gauteng economy with job opportunities, transformation, and modernization at the forefront. Central to these priorities is the drive to change the living conditions in townships, informal settlements, and hostels, heightened economic recovery and reconstruction programmes, better relation and leveraging of Africa as an important market and the strengthening of the marketing and communications capacity of the state.

The department will continue to pursue its mandate of economic development through various programmes and projects aimed to stimulate and grow the Gauteng Economy. Emboldened by progressive legislation that saw the passing of the Township Economic Development Act of 2022, the Department will make steady headway in making the Gauteng economy more inclusive and competitive, thereby cementing our position as the economic hub of the country and continent.

The following are intervention areas for the Economic Development Department and its entities:

- Economic growth and investment attraction, in particular through the implementation of the Special Economic Zones (SEZ).
- High growth sectors.
- Increased contribution of Township SMMEs to the GCR economy and employment targets through increased support for and procurement from township businesses.
- Improvement of the quality of lives of citizens in townships, informal settlements, and hostels (TISH).

Our delivery priorities will be achieved through job creation, infrastructure investment, reindustrializing the economy, growing small businesses, and accelerating economic reforms to unlock investment and growth. However, the need to address the energy crisis is urgent, and so is the need for implementing structural reforms, to spur expansion in job-creating sectors to meet the country's development goals. South Africa's unstable electricity supply has been a key hindrance to investment, growth, and employment creation. The difficulty to keep the lights on and power the economy however has compounded a weak economic growth outlook, with disruptions to operations and supply chains and limited business confidence delaying investments and net employment creation.

The Township Economic Development Act (TEDA) gave impetus to the establishment of the SME Partnership Fund, a public-private partnership initiative that will extend funding to SMMEs and township enterprises that are currently unable to access funding from financial institutions. We are

looking forward to the actual and direct beneficiation of the tourism and hospitality enterprises out of this ground-breaking venture.

Smart planning and sustained implementation are needed to anticipate and navigate the increasingly complex challenges facing the Gauteng Province Government (GPG). Transforming the economy will require well researched and carefully sequenced actions that build on strengths without destroying capacities. The department is focusing on disciplined implementation which will ensure that department actions are done effectively and efficiently.

While GDED has effectively managed the strategic, technical, and operational alignment process, the department has shifted its focus to ensure effective planning and implementation. These efforts will enable the department to meet its legislative, governance and oversight role while incorporating the elevated priorities and ensuring that our agencies play an effective role as delivery agents of the GGT 2030 blueprint.

MEC Tasneem Motara (MPL) Signature: _____ Date: _____
MEC of Economic Development

It gives me great pleasure to present the Gauteng Tourism Authority (GTA) annual performance plan for 2024–2025, a transitional period which houses the end of the 6th and the start of the 7th administrations. Through this tourism development and marketing plan, the GTA seek to prioritize major overarching interventions outlined in the Gauteng Tourism Sector Recovery Strategy in addition to focusing on attaining the elevated priorities of the Gauteng Provincial Government. These interventions aim to support the creation of jobs, diversification of the tourism industry's supply side, heightened attention to Gauteng Township's tourism infrastructure and targeted brand communications and stakeholder outreach initiatives.

Despite the COVID-19 pandemic's devastating effects, the tourism industry is slowly gravitating towards pre pandemic growth numbers and a robust domestic tourism base which bodes well for Gauteng’s positioning as a bleisure destination of choice. Travel patterns and, consequently, consumer preferences are fast moving toward small, customized groups, FIT, and semi-FIT, wellness and remote working all forming part of the phenomenon called revenge travel. One of the factors driving the recovery is pent-up demand for travel, sports entertainment events, bleisure experiences visiting friends and family (VFR), end-to-end online booking and the use of artificial intelligence and machine learning to aggregate data, insights, instant reach, and contactless experiences. In Gauteng we have joined the broader tourism sector in the use of the '5Cs' concept as a set of guiding principles for successful tourism projects activation, which encourages stakeholders and multidisciplinary teams to work together and share a common goal and mission:



To this end, GTA will continue to implement the Tourism Sector Recovery Plan in terms of focusing on the following interventions to support the sector's recovery, in collaboration with tourism value chain stakeholders:

- Create Demand to drive visitor numbers and the economy from both domestic and international markets.
- Position Gauteng as a leading global bleisure events destination of choice.
- Rejuvenate tourism supply by fostering the growth of the industry; and

- Supporting provincial government’s transformation agenda by supporting small medium enterprises.

We have reorganised the GTA’s Board of Directors Committees and work to respond to the vision outlined above while remaining true to established corporate governance principles and protocols. With the continued diminishing government purse and low revenue base, this plan red together with our strategic plan and business strategy documents is set to ignite the building blocks towards self-revenue generation and sustainability.

On behalf of the GTA Board, we appreciate the continued support and leadership of the Gauteng MEC for Economic Development Ms Tasneem Motara and the dedication of Team GTA in effective delivering of the mandate of the entity under very difficult circumstances. I hereby present the entity’s 2024/25 Annual Performance Plan.

Ms. Judy Nwokedi Signature: Date
GTA Board Chairperson

Chief Executive Officer Statement

The mandate of the Gauteng Tourism Authority (GTA) is to position the province as a global destination of choice, promote, develop, coordinate and facilitate sustainable tourism growth across the Gauteng City Region and add economic value in the province. Through the implementation of the tourism agenda, the anticipated outcome is sustainable GDP growth, sustainable job creation and redistribution and transformation.

Growth of tourism to and within Gauteng requires Gauteng Tourism Authority to provide an enabling environment in order to realise improvements in the tourism offering, visitor experience, and access to the destination, while deliberately ensuring that the tourism sector transformation levels improve significantly.

While we have made the massive strides in implementing the tourism recovery plan and the provincial blueprint in the form of the Growing Gauteng Together vision 2030 culminating in more than R30 billion injected by the visitor economy into the provincial GDP and over R33 billion leveraged by SMMEs from major events hosted in the province, the financial and operational sustainability of the GTA remains a going concern.

Financial resources

Not only has the GTA operational and developmental budget decreased by more than 17% over the past seven years, the agency has not been able to fill the more than 23% of its vacancy rate negatively impacting on the implementation of the Gauteng Tourism Act in particular the tourism development, management and planning functions, inter-governmental coordination and heightened international marketing to leverage our strong value proposition to the international source markets especially China, India, Americas and Africa.

In its reflection post the reorganisation of the Provincial Government and the 6th administration, Gauteng EXCO endorsed the elevated priorities which seamlessly became our preoccupation and focus areas. Consequently, the provincial government up-ward adjusted budget to accelerate the implementation of these priorities, the up-ward investment and recapitalisation of the GTA is now more than urgent. To this end the GTA has developed a sustainability strategy and invested in the building of an Always-On digital ecosystem which we believe will ease the pressure on our operations and resource requirements.

Over and above this, the Gauteng Tourism Act mandates the GTA to manage a development fund as well as manage donations for the development and growth of the Tourism Industry in the province. It is through this policy instrument and facility that we plan to roll-out our business strategy which is stakeholders and customer centric, technology powered and hosting communities biased. The critical elements of all these are contained in this plan which represents a step-by-step annual representation, measurements of the work and overall resourcing mechanism.

Spending on Designated groups

In support of the provincial government's transformation agenda, GTA will continue to prioritise spend on women, youth, people with disabilities and military veterans. Not only will this dedicated attention be limited to financial spend but it will expand to other aspects like enterprise and supplier development, storytelling capabilities of our military veterans and the expansion of our fair trade and responsible tourism practices.

Human Capital

The target operating model and organizational structure are inadequately designed to support the level of agility required by current and future operating contexts. To address this, the GTA launched transformation projects which will be implemented in the new fiscal.

The employee engagement survey is one of the tools used to assess an organization's employee dedication and enthusiasm. The first survey was conducted in the first quarter of the fiscal year 2022/23, with 80% of GTA employees participating, and the report indicated a 54.5% engagement rate.

The report included recommendations for addressing some of the organization's challenges. The second survey was conducted in the fourth quarter of FY2022/23, and 73% of GTA employees took part. According to the report, there was a 63.1% engagement rate with recommendations. As a result, the GTA will prioritize the recommendations in the new fiscal year while also working to create a welcoming and inclusive work environment for its employees.

I would like to appreciate the GTA employees who ensure that commitments made in the Annual Performance Plan are realized and benefits the hosting communities and propels the Gauteng visitor economy to greater heights.


Ms. Sthembiso Dlamini
Chief Executive Officer
Official Sign Off

Signature: Date

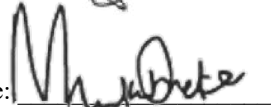
It is hereby certified that this Annual Performance Plan -2024/25:

- Was developed by the Management of the Gauteng Tourism Authority (GTA) under the guidance and direction of the Board (Board of Directors),
- Considers all the relevant policies, legislation, and other mandates for which GTA is responsible and
- Accurately reflects the impact, outcomes, and outputs which GTA will endeavour to achieve over the period 2024/25


Ms. Tinyiko Nkuna
Head Strategy and Business Intelligence

Signature:  Date: 28/04/2024

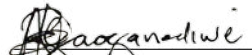
Ms. Nonnie Kubeka
Head Official responsible for Programme:
Conferencing, Events and Business Tourism

Signature:  Date: 28/02/2024

Mr. Mbuyiselo Kona
Head Official responsible for Programme:
Destination Management and Development

Signature:  Date: 28/02/2024


Mr. Barba Gaoganediwe
Head Official responsible for Programme:
Destination Marketing and Communications

Signature:  Date: 28/02/2024

Mr Mahomed Chowan
Chief Financial Officer

Signature:  Date 28 Feb 2024

Ms. Sthembiso Dlamini
Chief Executive Officer

Signature:  Date: 28 /02/2024

Ms. Judy Nwokedi
GTA Board Chairperson

Signature: _____ Date: _____

Mr. Blake Mosley-Lefatola
Head of Department: Gauteng
Department of Economic Development (GDED)

Signature: _____ Date: _____

Honourable Tasneem Motara
MEC of Economic Development

Signature: _____ **Date:** _____

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ABBREVIATIONS

4IR	Fourth Industrial Revolution
B2B	Business to Business
B2C	Business to Consumer
B-BBEE	Broad-Based Black Economic Empowerment
CEO	Chief Executive Officer
CSI	Corporate Social Investment
CRM	Customer Relations Management
GCR	Gauteng City Region
GCREDP	Gauteng City Region Economic Development Plan
GDED	Gauteng Department of Economic Development
GEP	Gauteng Enterprise Propeller
GPG	Gauteng Provincial Government
GTA	Gauteng Tourism Authority
GTSS	Gauteng Tourism Sector Strategy
GDP	Gross Domestic Product
ICCA	International Congress and Convention Association
IEA	International Energy Agency
MICE	Meetings, Incentives, Conferences and Exhibitions
MTSF	Medium-Term Strategic Framework
NDP	National Development Plan
NGOs	Non-Government Organisations
PFMA	Public Finance Management Act
PR	Public Relations
TER	Township Economic Revitalisation
VIC	Visitor Information Centre
VIS	Visitor Information Services
UNWTO	United Nations World Tourism Organisation
SADC	Southern African Development Community
SAT	South African Tourism
SMMEs	Small, Medium and Micro Enterprise
SA	South Africa

PART A: OUR MANDATE

1. CONSTITUTIONAL MANDATE

Part A of Schedule 4 to the Constitution of the Republic of South Africa (1996) lists tourism as a functional area of concurrent national and provincial legislative competence. Accordingly, the provincial legislature can enact laws regulating tourism affairs in the province, hence the Gauteng Tourism Act.

2. LEGISLATIVE AND POLICY MANDATES

2.1. Legislative Mandate

Tourism is a concurrent competence of both national and provincial governments. Both national and provincial legislation affect the mandate of the Gauteng Tourism Authority.

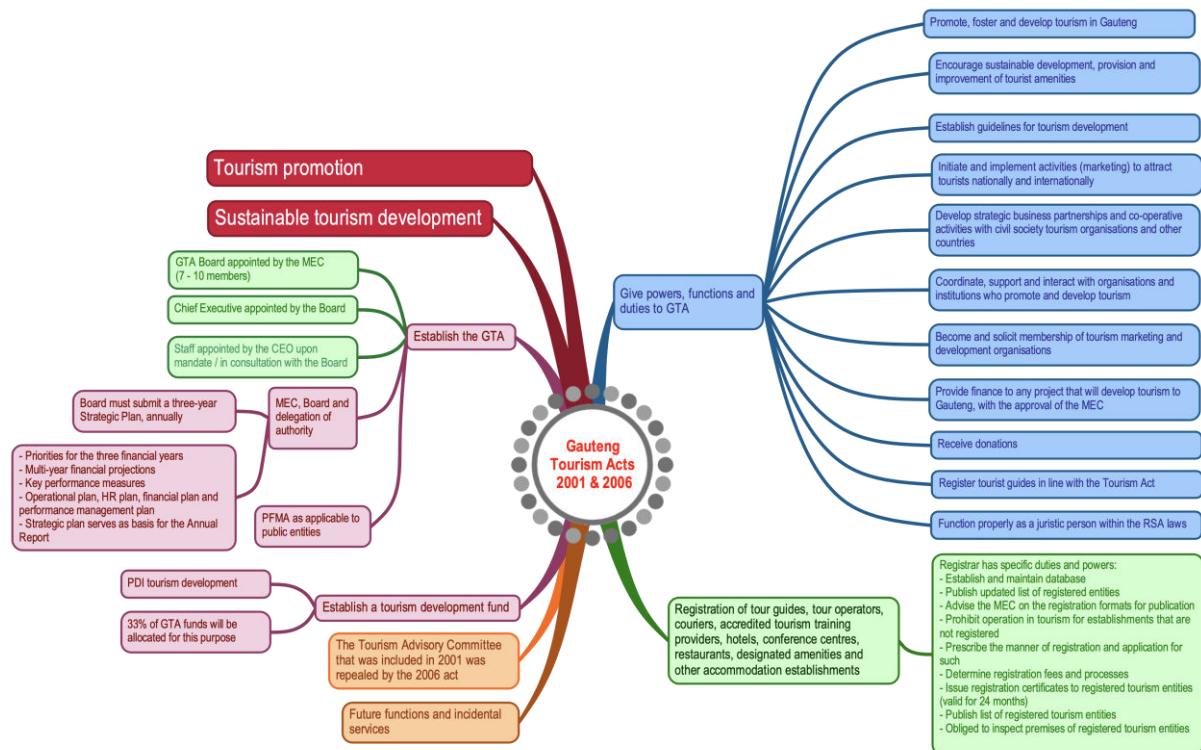
2.1.1. The Tourism Act (No. 3 of 2014)

The goal of the Tourism Act is to promote responsible tourism for the benefit of the South African economy and the enjoyment of all citizens and foreign visitors. It further aims to provide for the effective domestic and international marketing of South Africa as a tourist destination of choice. The Act promotes quality tourism products and services, encourages growth and development of the tourism sector, and enhances cooperation and coordination between all spheres of government in developing and managing responsible tourism. The act further promotes tourism that seeks to avoid negative economic, environmental, and social impacts; generates greater economic benefits for local people, enhances the well-being of host communities and improves working conditions and access to the tourism sector. Lastly, the act regulates the registration of tourism guides within the Republic of South Africa.

2.1.2. The Gauteng Tourism Act (10 of 2001)

The Authority was established in terms of the Gauteng Tourism Act, No. 18 of 1998, repealed by the Gauteng Tourism Act, No. 10 of 2001 as amended, which became the enabling legislation. The National Tourism Act 3 of 2014 (“Tourism Act”) provides for the effective domestic and international marketing of South Africa as a tourist destination and the promotion of growth and development of

the tourism sector and responsible tourism. Inter alia, it seeks to generate more significant economic benefits for our local people and host our communities. The GTA is one of several provincial tourism agencies that have been established in alignment with the objectives of the Tourism Act. The Gauteng Tourism Act 10 of 2001 (“Gauteng Tourism Act”) provides for the establishment of GTA as a juristic person and provincial public entity (read with sections 1, 48 and 49 and schedule 3C of the Public Finance Management Act [“PFMA”]). The picture below summarises what the Gauteng Tourism Act stipulates.



Through this Act, GTA is responsible for the following duties: promote and develop tourism in Gauteng; encourage sustainable development, provision, and improvement of tourist amenities; establish guidelines for tourism development; initiate and implement activities and actions nationally and internationally to attract tourists to Gauteng; develop strategic and business partnerships and other cooperative activities with tourist organisations in civil society and other countries; co-ordinate, support and interact with organisations and institutions aimed at promoting and developing tourism; solicit membership with and become a member of, organisations for tourism development and marketing; with approval of the GTA’s Executive Authority, provide finance for any project which will develop tourism in Gauteng.

2.1.3. The Public Finance Management Act (PFMA)

GTA is listed as a Schedule 3 entity in terms of the PFMA. As a Schedule 3 entity, the Authority relies on fiscal allocation to undertake its operations to fulfil its mandate. Therefore, the entity should comply with the provisions and compliance requirements of the Act. The Act further regulates the conduct of the entity's Accounting Authority (the Board) and requires them to exercise a duty of utmost care in managing public resources. In instances where the interest of the public entity could be compromised, Board members are obliged to report to the Executive Authority, in this case, the Member of the Executive Council (MEC) responsible for economic development.

2.2. Policy Mandate

2.2.1. National and Provincial policy mandates

- National Tourism Sector Strategy (NTSS) 2016-2026
- Gauteng Tourism and Sector Strategy
- Gauteng Employment, Growth and Development Strategy
- Gauteng Provincial Government Priorities

2.2.2. GTA Unique Institutional Policies and Strategies

- Integrated Destination Marketing Strategy
- Tourism Institutional Framework
- GTA Financial Sustainability Strategy
- Visitor Services Strategy
- Bidding and Hosting Strategy

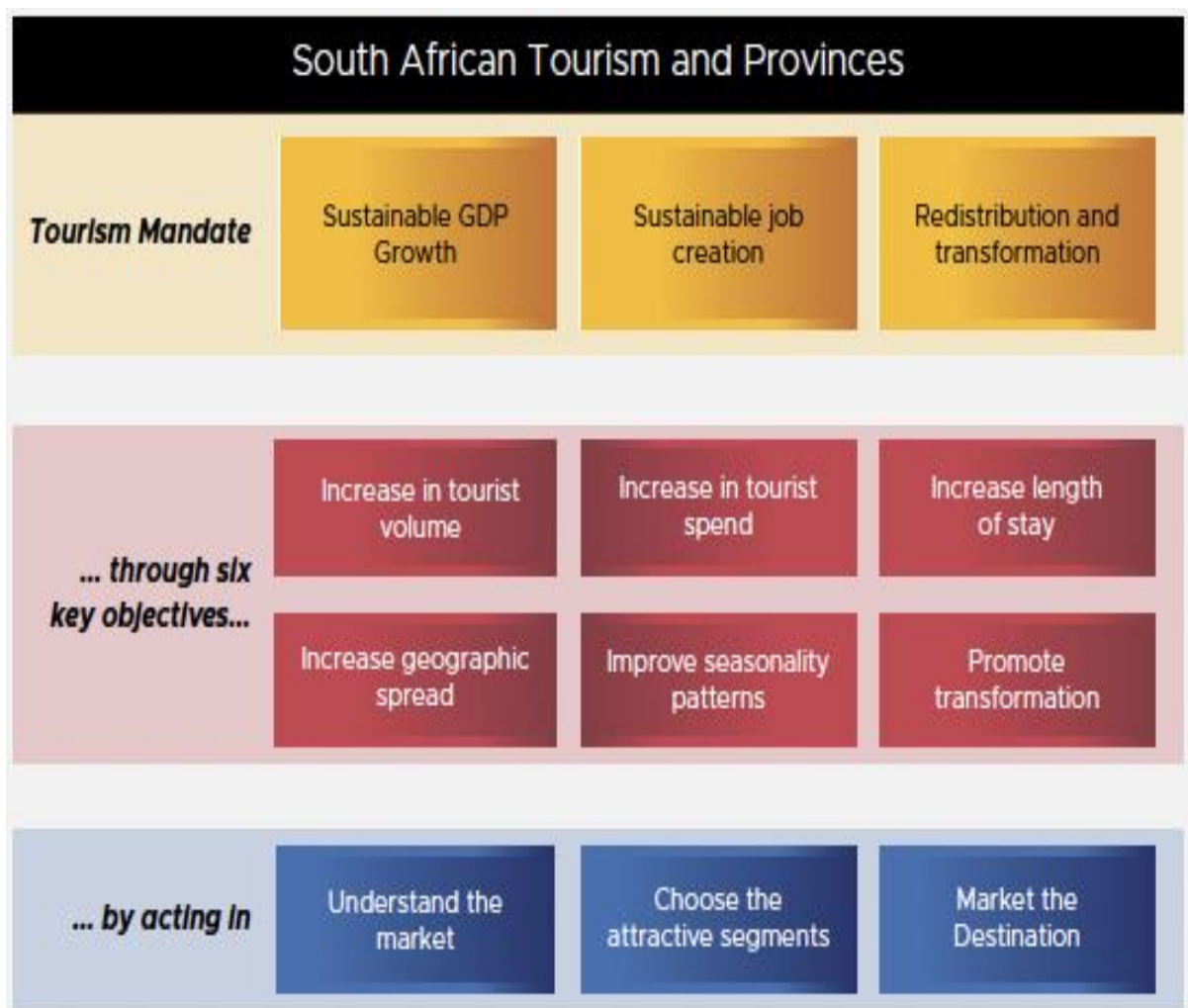
3. UPDATES TO RELEVANT COURT RULINGS

As in FY2023/24, there are no relevant court rulings that GTA must implement during FY2024/25.

PART B: OUR STRATEGIC FOCUS

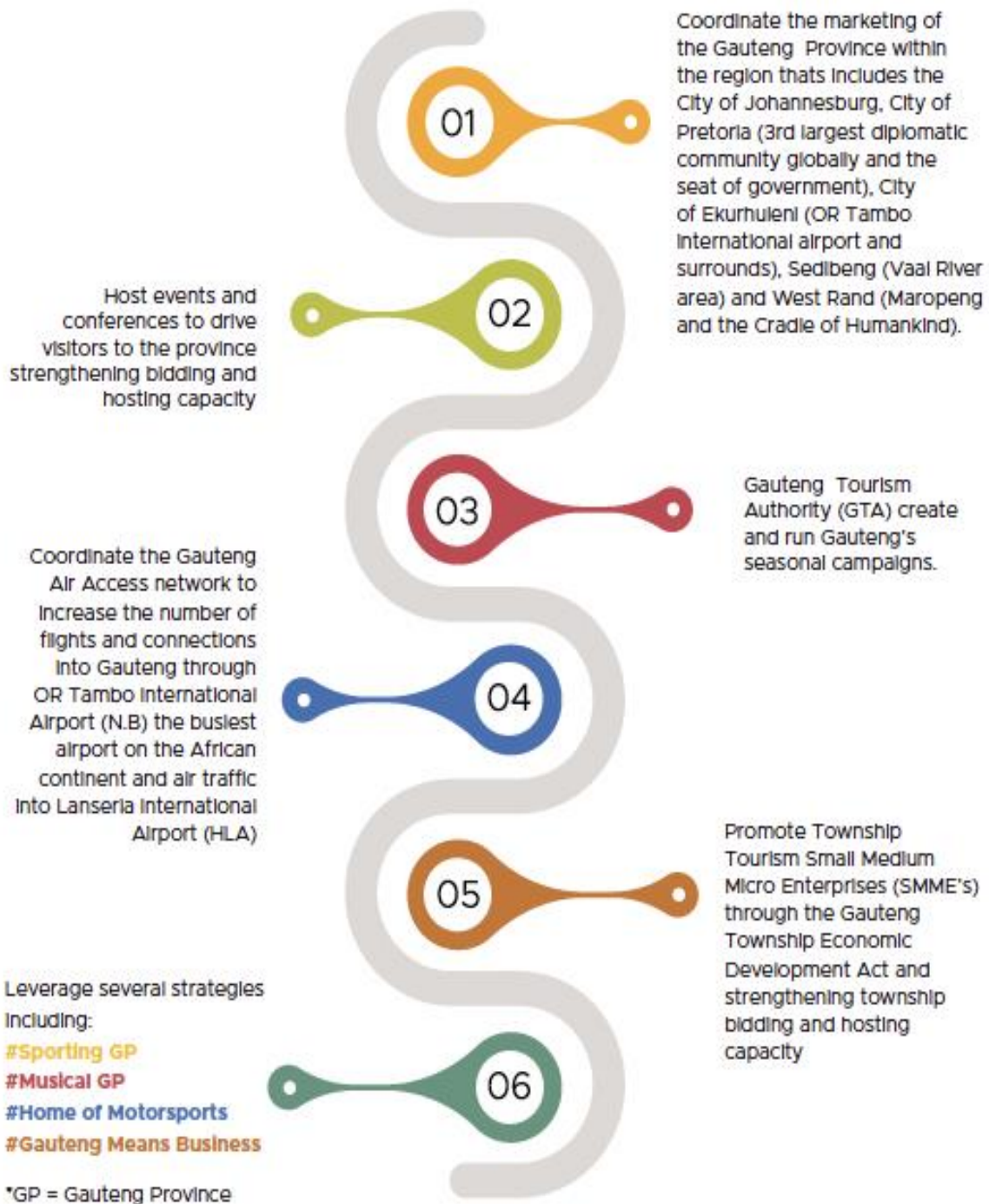
GTA is an agency of the GDED, and it is committed to the economic growth and development of the Gauteng City Region through leveraging on the provincial tourism potential, development, and preservation. This GTA Strategic Plan defines the envisaged impact of GTA’s planned outcome in the lives of the province's residents through focused implementation of this Strategic Plan for the period 2020/21 to 24/25. Our outcomes are aligned with the Gauteng Employment, Growth and Development Strategy.

4. STRATEGIC DIRECTIVES



Gauteng Tourism Authority

Key motivators to drive tourism



GTA is the implementing agency of the Gauteng Department of Economic Development (GDED). The Authority is committed to the economic growth and development of the Gauteng City Region (GCR) through leveraging the provincial tourism potential, its development and preservation.



4.1. Marketing Principles

We have adopted the following marketing principles:

- 4.1.1. **With Scarcity comes Clarity** - Prioritising limited resources continues to focus Gauteng Tourism efforts on those programmes that maximize impact, leverage our budget, and create value for our industry partners and hosted communities.
- 4.1.2. **Create Value and Add Value** - Every Gauteng Tourism programme or initiative must create value and add value for one or more of our stakeholder groups underpinned by shared value principles.
- 4.1.3. **Something for Everyone, but not Everything for Everyone** - Gauteng Tourism has made a strategic decision to strive to provide valuable programmes for all partners whilst recognising and communicating that only some programmes will be a good fit for some partners.
- 4.1.4. **Quality VS Quantity** - Gauteng Tourism recognises that it is not necessarily the number of people we reach that is the most important – it is the most impact we have on consumer behaviour.
- 4.1.5. **If it's worth doing, it's worth doing it right** - GTA will not compromise quality.

- 4.1.6. **Everything is Co-opable** - to maximise the reach of our brand, we will explore co-operative arrangements in all our marketing efforts. GTA will focus on expanding Gauteng's presence in front of consumers by facilitating cost-effective opportunities while ensuring regional spread and community beneficiation.
- 4.1.7. **Do what the industry cannot do for itself** - Gauteng Tourism provides a provincial marketing platform to promote the Gauteng Tourism brand domestically and internationally. Similarly, GTA strives to develop and manage destination Gauteng tourism initiatives to use tourism to grow Gauteng Together through jobs recovered and tourism revenue generated.

5. SITUATIONAL ANALYSIS

5.1.External Environment

5.1.1. *Overview and context within the SDGs*

The travel and tourism industry, which is key to socio-economic development, has shown notable resilience and growth in recent years. As of 2023, the World Travel & Tourism Council (WTTC) reports that the sector's global contribution is expected to reach \$9.5 trillion, nearing the pre-pandemic levels of 2019 (WTTC, 2023). This figure represents a significant recovery, considering the industry's impact was just 5% below the 2019 peak levels. In terms of employment, the sector rebounded impressively from the severe job losses during the COVID-19 pandemic (ILO, 2023). After losing more than 70 million jobs in 2020, the industry recovered 11 million jobs in 2021 and added 21.6 million new jobs in 2022 (WEF, 2023). By the end of 2022, more than 295 million people were employed globally in the tourism sector, constituting approximately one in every 11 jobs worldwide.

Looking forward, the WTTC forecasts a continued growth trajectory for the sector. By 2033, the industry's GDP contribution is projected to grow to \$15.5 trillion, representing 11.6% of the global economy (Bloomberg, 2023). Employment in the sector is expected to rise to 430 million globally, accounting for nearly 12% of the working population.

Notably, 34 countries had already exceeded their 2019 tourism levels as of 2023, and it is expected that nearly half of the 185 countries analyzed will have fully recovered to pre-pandemic levels or be within 95% of full recovery by the end of 2023 (Stats SA, 2023; WTTC, 2023).

These statistics underscore tourism’s pivotal role in global economic growth, job creation, and socio-economic development, aligning with the Sustainable Development Goals (SDGs) and contributing significantly to goals such as Decent work and economic growth (Goal 8), Responsible consumption and production (Goal 12), and Life below water (Goal 14).



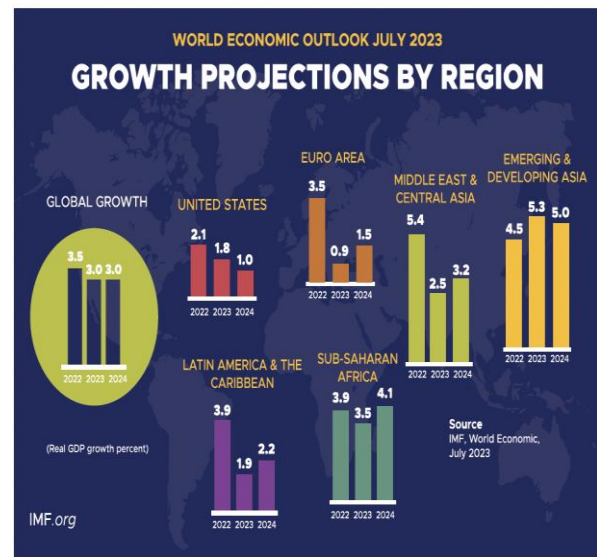
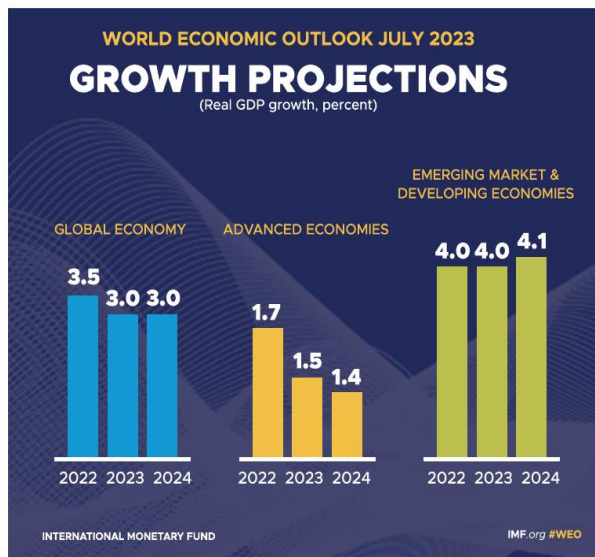
Tourism plays a crucial role in economic growth, and evolving service demands in developed economies could lead to stronger tourism demand, potentially enhancing the economic impact of investment initiatives. However, the industry faces challenges such as slowing key tourist markets, escalating food and fuel costs, natural disasters, and decreased revenue from citizenship-by-investment programs. These factors could impede growth, strain fiscal conditions, and jeopardize debt stability.

Despite these challenges, the tourism sector has shown resilience, continuing its recovery from the pandemic's impacts in the face of rising energy and food costs, as noted by the International Monitoring Fund (IMF) in 2023. This recovery has been buoyed by a resurgence in tourism and government policies addressing global food and fuel price hikes. While growth rates are expected to be slower, tourism-related activities are anticipated to drive economic expansion in 2023.

5.1.2. Impact on the Global Economy

Globally, governments have responded proactively to both pandemics and the escalation in energy and food prices. Between 2020 and 2022, various relief measures played a critical role in curbing the spread of COVID-19 and shielding populations from the economic impacts of rising global food and fuel prices. However, there are suggestions that these support measures could have been more effectively targeted to conserve fiscal resources. As indicated, the actual GDP growth in 2022 was 3.5%, with projections for a growth of 3.0% in both 2023 and 2024.

Current global crises, such as increasing interest rates and high food and energy costs, continue to pressure economic activities. The Russia-Ukraine conflict further exacerbates these challenges. The United Nations Conference on Trade and Development (UNCTAD) 2024-2025 Report identifies the Ukraine conflict as a key factor contributing to the global food and energy crisis, spiralling inflation, and tightening debt conditions among nations. At the same time, there is no specific forecast for global growth. A moderate increase is anticipated in 2024. This uptick, however, hinges on various factors, including the approach and timing of further monetary policy tightening, the ongoing situation in Ukraine, and potential disruptions in supply-chain sectors.



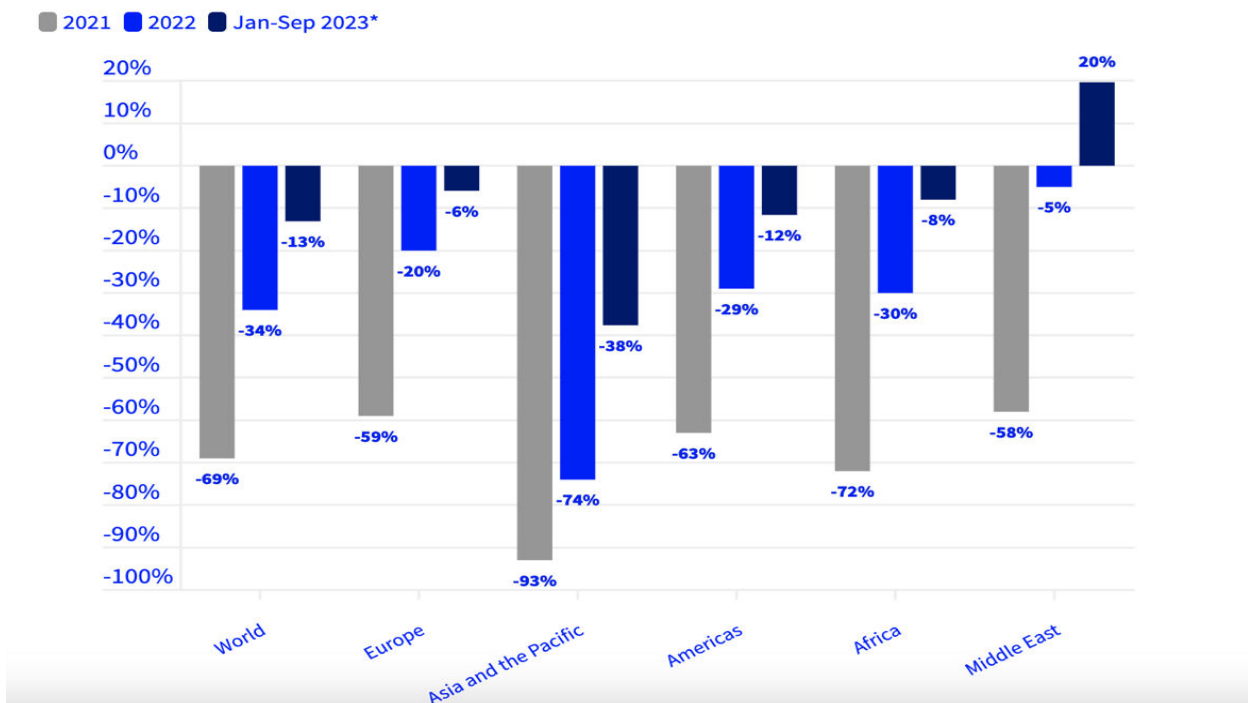
The World Bank reports that domestic food price inflation remains high in many countries, with the most affected regions including Africa. This inflation is partly driven by increased maize and wheat prices, which have risen substantially. Despite some global food price declines in 2023, the situation remains challenging, especially for low-income and food import-dependent countries (World Bank, 2023). As of 2023, Africa continues to face significant challenges related to food security, exacerbated by various factors, including the aftermath of the Russia-Ukraine conflict. This conflict has contributed to rising food and fertilizer prices, increasing staple food costs in Africa, adding \$9 billion to the import

bill, affecting about 24 African economies. South Africa's food inflation rate reached a 14-year high in March 2023. Rising prices of vegetables, wheat and corn-based products, and plant-based oils drove this surge. The country's ongoing electricity crisis has also compounded the situation, increasing costs across food value chains, and consequently driving food price inflation (USDA, 2023).

Furthermore, the Global Report on Food Crises highlights that economic shocks, conflicts, and climate extremes have significantly driven acute food insecurity and malnutrition. In 2022, around 35 million people experienced emergency levels of acute hunger in 39 countries, with over half located in just four countries, including the Democratic Republic of the Congo and Sudan. The report also emphasizes the need for a paradigm shift towards more effective humanitarian assistance and investments in food security, sustainable agrifood systems, and nutrition improvement to address the root causes of food crises (FAO, 2023).

The newest UNWTO World Tourism Barometer also shows that world destinations welcomed 22% more international tourists in the third quarter of 2023 than last year.

International tourist arrivals (% change vs. 2019)



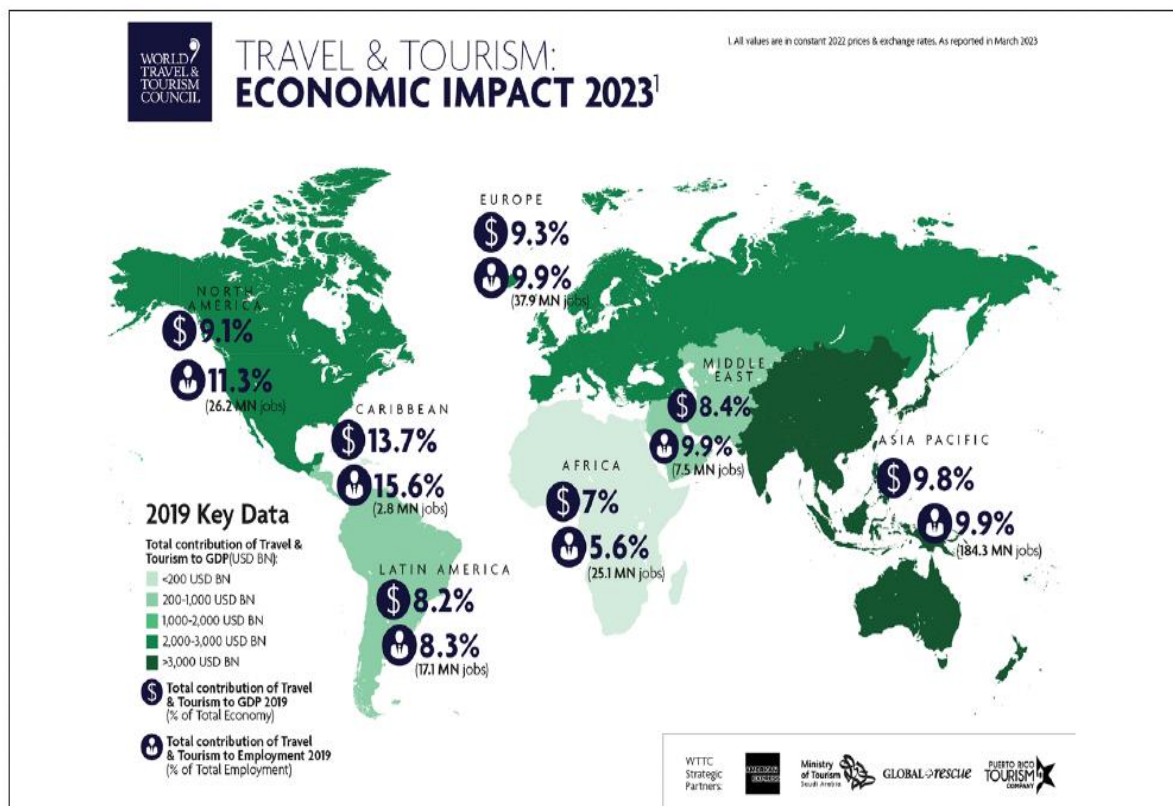
International tourism receipts were set to reach USD 1.4 trillion in 2023, about 93% of the USD 1.5 trillion earned by destinations in 2019.

The **Middle East** continues to lead the recovery by regions in relative terms, with arrivals 20% above pre-pandemic levels in the nine months through September 2023. The Middle East remains the only world region to surpass 2019 levels this period. Visa facilitation measures, the development of new destinations, investments in new tourism-related projects and hosting large events help underpin this remarkable performance.

Europe, the world's largest destination region, welcomed 550 million international tourists over the period, 56% of the global total. That represents 94% of pre-pandemic levels. The rebound was supported by robust intra-regional demand and strong demand from the United States.

Africa recovered 92% of pre-pandemic visitors these nine months, and arrivals in the Americas reached 88% of 2019 numbers this period, as the region benefitted from strong US demand, particularly to Caribbean destinations.

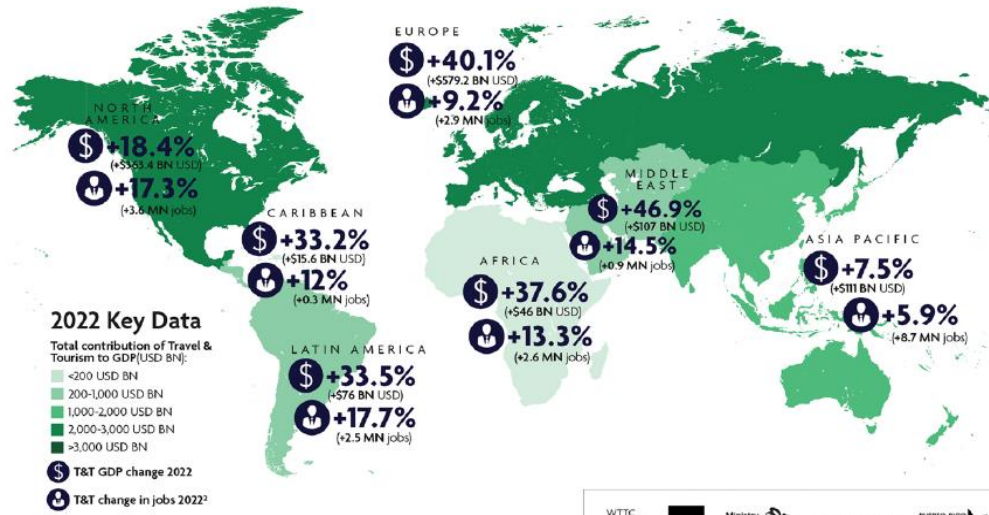
Asia and the Pacific reached 62% of pre-pandemic levels this period due to slower reopening to international travel. However, performance among subregions is mixed, with South Asia recovering 95% of pre-pandemic levels but North-East Asia only about 50%.





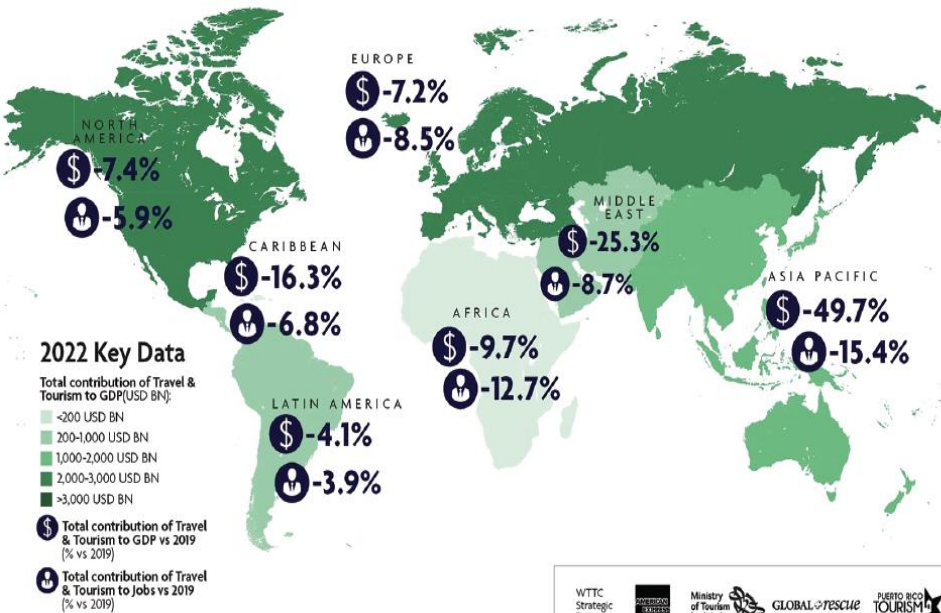
TRAVEL & TOURISM: ECONOMIC IMPACT 2023¹

1. All values are in constant 2022 prices & exchange rates. As reported in March 2023
2. Where the country or region has implemented job support schemes and supported jobs are still recorded as employment by national statistical authorities, job losses exclude those supported jobs (where known)



TRAVEL & TOURISM: ECONOMIC IMPACT 2023¹

1. All values are in constant 2022 prices & exchange rates. As reported in March 2023



5.1.3. Impact on the South African Economy

The African tourism economy is set to outpace the overall economy for the next ten years in terms of growth. GDP is forecasted to grow at an average rate of 6.8 per cent annually in the next seven years (2022-2032), which is more than twice the 3.3 per cent growth rate of the region's overall economy, to reach nearly US\$ 279 billion (7.2 per cent of the total economy). The sector's contribution to GDP was expected to grow 20.5 per cent to US\$ 144 billion by the end of 2022, amounting to 5.1 per cent of the total economic GDP.

SA's tourism sector's contribution to GDP as a share of the total economy was 6.4 per cent (R405.2 billion) in 2021. It fell to just 3.1 per cent (R 180 billion) in 2020, representing a staggering 55.6 per cent loss. The sector also supported more than 1.5 million jobs across the country before suffering a 29.9 per cent drop. WTTC (2023) asserted that South Africa recorded tourism recovery at the beginning of 2021. Its 2022 contribution to GDP increased by 8.4 per cent year-on-year to reach over R195 billion. The sector is expected to grow 37.2 per cent yearly to nearly R268 billion (4.3 per cent of the total economy). The sector is further forecasted to grow at an average rate of 7.6 per cent annually over the next decade, outperforming the 1.8 per cent growth rate of the country's overall economy. The SA's tourism sector is expected to continue contributing to GDP by more than R554.6 billion (7.4 per cent of the total economy), bringing nearly ZAR 287 billion into the national economy.

In 2023, South Africa faced a range of economic challenges, but there were also signs of resilience and recovery in certain sectors. According to the South African Reserve Bank (SARB) 2023, the country's disposable personal income increased in the first quarter of 2023 compared to the fourth quarter of 2022. However, the household debt to disposable income ratio also rose during this period, indicating growing financial pressures on households. South Africa's inflation is expected to average around 5% in 2024, according to the South African Reserve Bank (SARB) governor. This projection is within the SARB's target range of 3-6%. However, despite declining food costs, annual inflation slowed to 5.5% in November 2023 due to cooling fuel prices. The central bank is cautious about cutting rates and aims to ensure that inflation sustainably declines to around 4.5% (Chowdhury & Gumbi, 2024).

The South African economy experienced modest growth in the first quarter of 2023, with a 0.5% increase in real gross domestic expenditure. This was an improvement from a decrease observed in the last quarter of 2022. Household consumption played a significant role in this growth, although decreased net exports partially offset it. Despite this, the economy faced headwinds such as load-shedding and an uncertain external environment, which continued to affect sectors like manufacturing and construction (SARB, 2023).

PwC's analysis in January 2023 provided further insights into the economic outlook for South Africa. It highlighted ongoing challenges, including load-shedding, that were expected to continue affecting economic performance. The report also noted that while large companies and wealthy households had adapted to these challenges by acquiring off-grid power solutions, smaller businesses and most households faced difficulties due to power outages. These disruptions impacted small businesses' production, supply chain costs, operating hours, and security. Despite these challenges, there was some recovery in employment, but unemployment rates remained high, with concerns for youth unemployment.

REAL GDP, ANNUAL PER CENT CHANGE	2022	2023	2024
World Output	3.5	3.0	3.0
Advanced Economies	2.7	1.5	1.4
Emerging Markets	4.0	4.0	4.1
SA's / Gauteng's Top Ten Source Markets			
USA	2.7	1.8	1.0
Germany	1.8	-0.3	1.3
UK	2.5	0.8	1.3
Zimbabwe	3.0	2.5	3.6
Mozambique	4.1	5.0	8.2
Botswana	6.4	3.7	4.3
Lesotho	2.1	2.2	2.3
Eswatini	0.5	2.8	2.5
Namibia	3.8	2.8	2.6
Malawi	0.8	2.4	3.2
Sub-Saharan Africa	3.9	3.2	3.0
South Africa	1.9	0.3	1.7
Nigeria	3.3	3.2	3.0

IMF, 2023

The World Travel and Tourism Council's Economic Impact Report forecasts that the South African Travel and Tourism sector is expected to grow at an average rate of 7.6% annually over the next decade. This growth is significantly more than the 1.8% growth rate of the country's overall economy. According to the National Treasury's forecasts, South Africa's economy is expected to grow by 0.9% in 2023 and recover slowly to 1.8% by 2025 (Gov. za, 2023).

This rate of economic expansion is well below the pace required to generate significant employment growth and support national development, the Treasury has said. More than the agriculture, utilities and construction sectors, tourism contributes just below 4% to South Africa's GDP. By 2032, the tourism sector's contribution to GDP could reach more than R554.6 billion (7.4% of the total economy), injecting nearly R287 billion into the national economy, the World Travel and Tourism Council's Economic Impact Report suggests (Gov. za, 2023).

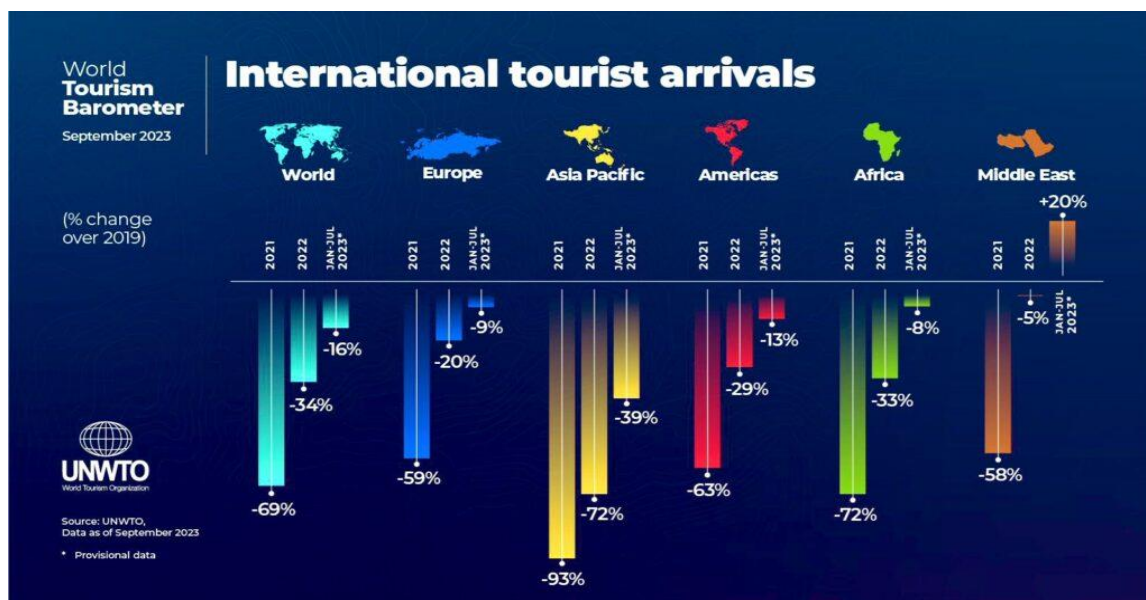
South Africa's Human Development Index (HDI) is 0.713, with life expectancy at 62.3 years, mean years of schooling at 11.3 years, and expected years of schooling at 13.6 years. According to Africa

Data Hub, South Africa's Gross National Income (GNI) per capita stands at \$12,948, reflecting a high level of development but still below the global average HDI of 0.732.

The sector is an important driver for job creation worldwide (globally, one in 10 jobs were created in the industry in 2019) and is no different in the local context. Most tourists to South Africa (95,3%) come for holidays. Direct jobs include employment by hotels, travel agents, airlines, and other passenger transportation services (excluding commuter services). It also includes activities of hospitality, restaurants and leisure industries directly supported by tourism. Tourism is expected to create more than 800,000 jobs over the next decade, reaching more than 1.9 million by 2032, according to the World Travel and Tourism Council’s Economic Impact Report. Employment in the sector is set to grow by 3.8% to reach more than 1.1 million jobs by the end of this year.

Regarding youth unemployment, a significant issue in South Africa, the National Human Development Report (SANHDR) 2022 by the United Nations Development Programme (UNDP) highlights that this not only limits the earning potential of youth but also affects business growth and social cohesion. The unemployment rates for youth aged 14-24 years and 25-34 years are alarmingly high at 61.0% and 39.9%, respectively. The overall national unemployment rate is 32.7% (UNDP, 2022). The SANHDR 2022 emphasizes a multi-faceted approach to address youth unemployment, focusing on education and skills development, job creation, and harnessing opportunities in new sectors like technology and green industries.

5.1.4. World Tourism’s 2023 Performance



International tourism experienced a significant recovery in 2023, approaching pre-pandemic levels. The World Tourism Organization (UNWTO) reported that in the first three months of 2023, around 235 million tourists travelled internationally. This figure more than doubled the number of international travellers in the same period in 2022, indicating a robust recovery of the tourism sector. By the end of the first quarter of 2023, international arrivals had reached 80% of the pre-pandemic levels. International tourism was on track to recover almost 90% of pre-pandemic levels for the year. An estimated 975 million tourists travelled internationally between January and September 2023, marking a 38% increase compared to the same months in 2022. The recovery was particularly strong in the Middle East, with arrivals 20% above pre-pandemic levels in the first nine months of the year.

Europe also saw a significant rebound, with 550 million international tourists, representing 94% of pre-pandemic levels. Africa recovered 92% of its pre-pandemic visitor numbers, and the Americas reached 88% of their 2019 numbers during this period. Asia and the Pacific had slower reopening to international travel and reached 62% of pre-pandemic levels. However, the UNWTO also cautioned about remaining alert to challenges such as geopolitical insecurity, staffing shortages, and the potential impact of the cost-of-living crisis on tourism (UNWTO, 2023).

5.1.5. Arrivals to Gauteng

South Africa has seen a significant increase in international tourist arrivals in 2023. From January to November of that year, the country recorded 7.6 million international tourist arrivals (Travel and Tour World, 2023). This marks a 51.8% increase from the same period in 2022. Despite this impressive growth, these numbers were still 17.6% lower than the pre-pandemic figures recorded for the same timeframe in 2019. The recovery indicates a strong rebound for the nation's tourism sector, reflecting South Africa's enduring appeal to regional and international travellers. The country's success in drawing visitors has been attributed to various factors, including strategic marketing efforts and improvements in the visa process, which have been particularly effective in the African region, the Americas and Europe (GazetteNGR, 2023).

Tourism in Gauteng is showing signs of recovery and growth in 2024. According to Stats SA, international tourist arrivals from January to November 2023 totalled 7.6 million, representing a remarkable 51.8% increase compared to the same period in 2022. International tourist arrivals in Gauteng reached 4.8 million, a 70.6% increase from the previous year (Stats SA, 2023). While recovery towards pre-COVID-19 numbers is encouraging, this performance is 17.6% lower than in 2019.

However, this upward trend is encouraging as the country aims to surpass pre-COVID arrival numbers and exceed 10 million by March 2024.

Most tourists came from other African countries, with Zimbabwe and Kenya showing significant increases due to improved visa regulations and targeted marketing campaigns. Zimbabwe saw an exceptional 77,5% increase in tourist arrivals, totalling 1.9 million, while Kenya recorded a 94,2% surge, reaching 37,414 arrivals for January to November 2023 compared to the same period last year. South Africa welcomed 5.8 million visitors from the rest of Africa, marking a significant 75.5% of all arrivals compared to the same period in 2022. Tourist arrivals from the Americas registered at 411 254, reflecting a 44.1% growth compared to the same period in 2022. A recorded 320,948 tourists from the United States visited South Africa (39.5% growth).

The European market also showed strength, with the United Kingdom, Germany, and the Netherlands contributing to the rise in tourism numbers. With 1.1 million tourist arrivals, Europe contributed to 14.6% of the total arrivals during the first 11 months of 2023, a 43.2% increase compared to 2022.

- 315 054 residents from the United Kingdom (30.4 % growth).
- 219 971 arrivals from Germany (47.9% growth).
- 117 948 arrivals from the Netherlands (48.4% growth).
- 25 116 arrivals from Russia, a growth of 83.9%.

The Asian markets also showed significant growth, with 182 497 arrivals from the region, representing an astounding 72.6% compared to the same period last year. A resurgence in visitors from China can be attributed to the reopening of the Chinese market and the initiation of direct flight routes.

- 34 669 arrivals from China (215.7% growth).
- 73 037 arrivals from India (46.3% growth).

The Middle East saw a robust increase, with 51 779 arrivals in the same period – a 37.5% growth.

- 15 507 arrivals from Saudi Arabia (40.9% growth).
- 6 360 arrivals from the United Arab Emirates (114.2% growth).

Against this backdrop, tourism is well on track to fully recover pre-pandemic levels in 2024 despite economic challenges such as high inflation, weaker global output, and important geopolitical tensions and conflicts. The data and forecasts suggest a positive outlook for tourism in South Africa and Gauteng specifically, suggesting a sustained recovery and potential return to pre-pandemic levels. Gauteng is

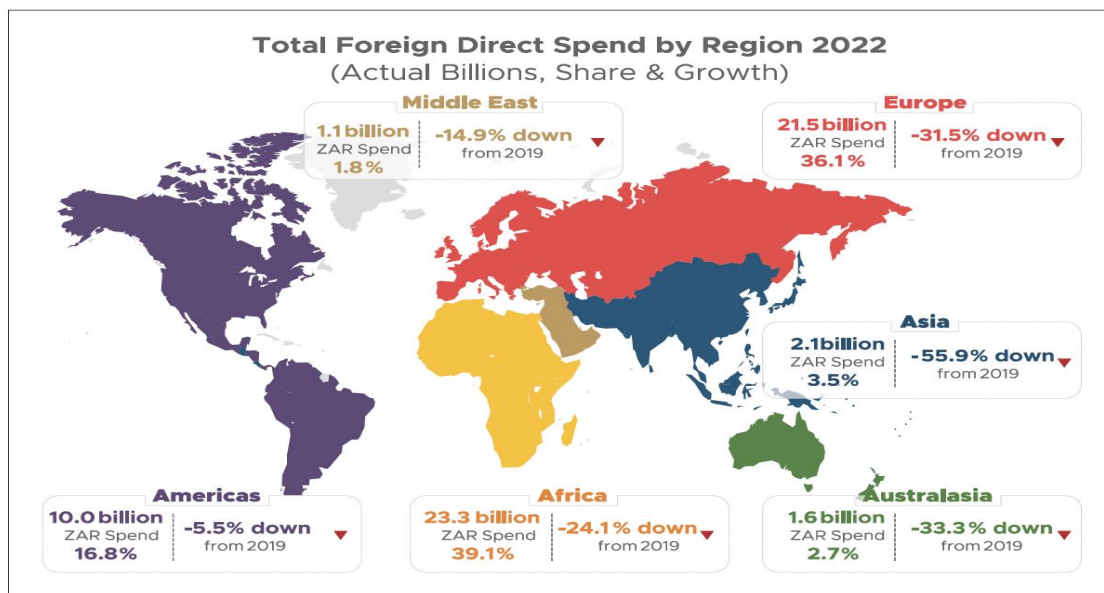
expected to continue leading South Africa's inbound tourism, with projections forecasting an increase in international arrivals from 2.3 million in 2022 to more than 3.6 million by 2025.

5.1.6. Tourism Spends

The industry is expected to exceed 2019 performance by the end of 2024. It will be possible for Chinese travellers to re-enter the market. Thus, the sector is projected to grow its GDP contribution to \$15.5 trillion by 2033, representing 12 per cent of the global economy and employing 430 million people worldwide, with almost 12 per cent of the working population employed in the sector. The EIR (2023) reveals that 34 of the 185 countries have now recovered to pre-pandemic levels regarding GDP contribution. WTTC (2023) predicted that by the end of 2023, nearly half of the 185 countries would fully recover to pre-pandemic levels or be within 95 per cent of full recovery.

In 2022, SA's total foreign direct spending reached ZAR 59.6 billion, showing a remarkable growth of 186.6 per cent against 2021 and a 26.5 per cent reduction against 2019 (SAT, 2023). Personal shopping expenditure demonstrated an average recovery of 26.3 per cent, while food, leisure, transport, accommodation, and business shopping spending were much slower to recover. However, medical expenditure showed remarkable growth at 83 per cent.

Business travel was reduced, signifying the recovery of visiting friends and relatives indicator (VFR). VFR fully recovered, but the holiday visit has not. Shares for business shopping and business travel were more robust in 2019 but weaker in 2021, and as in 2022, they have not returned to their 2019 records. VFR scored 43.0 per cent, holiday scored 16.6 per cent, followed by Business Shopping at 12.3 per cent and Business Travel at 8.8 per cent. MICE scored 3.9 per cent, following medical at 4.7 per cent. The total foreign direct spend per region is presented in the map below:



In the first quarter of 2023, South Africa's tourism sector demonstrated a remarkable rebound from the COVID-19 pandemic. The country witnessed a significant increase in overnight domestic tourism, which generated R25.3 billion in direct spending, reflecting a robust 143.9% increase from the first quarter of 2022. While this figure approaches the R25.6 billion spent in the same period of 2019, it indicates the sector's strong recovery trajectory. The rise in domestic tourism spend during the first few months of 2023 showcases the resilience of South Africa's tourism industry, with substantial contributions from both local and international visitors. European tourists were among the largest contributors to this spending, followed by visitors from African nations (RateWeb, 2023, Tourism Update, 2023).

5.1.7. Competitiveness

As of 2023, South Africa remains classified as an upper-middle-income country, according to the World Bank. This classification places it alongside a select group of African nations, including Mauritius, Botswana, and Gabon, within the income bracket of \$4,096 to \$12,695 gross national income per capita. The South African economy has significantly evolved from its reliance on agriculture and resource extraction. It has become the industrial powerhouse of Africa, contributing 24% to the continent's gross domestic product. The major sectors contributing to its GDP include finance, real estate, business services, government services, wholesale and retail trade, and manufacturing.

Despite these advancements, South Africa faces challenges such as a high unemployment rate, estimated at 31.9% in the third quarter of 2023, and a significant youth unemployment rate. The economy is also marked by high levels of inequality, with a large portion of the population living in poverty.

Nevertheless, South Africa's middle class has grown substantially since the end of apartheid in 1994, and the gross domestic product has increased from US\$136 billion to US\$408 billion.

Tourism is a significant and growing sector in South Africa. Gauteng, the country's smallest province in terms of land area, is a major contributor to the economy and leads in terms of tourism arrivals and bed nights. Among South African cities, Johannesburg stands out as a top destination for international visitors in 2022, followed by Pretoria and Sandton. Cape Town is particularly notable in tourism, ranked as a top travel destination globally.

The South African economy is the second largest in Africa, after Nigeria, and is the most industrialized, technologically advanced, and diversified continent. The country's economy has diversified since the end of apartheid, with a significant shift towards the services sector, including a strong financial industry that contributed US\$41.4 billion to the GDP in 2019. Moreover, South Africa-based financial institutions managed over US\$1.41 trillion in assets as of 2021.

While South Africa faces challenges such as high unemployment and inequality, its diversified economy and growing sectors like tourism and financial services point towards a vibrant economic landscape with potential for further growth and development.

5.1.8. Tourist Safety

It is apparent that despite proactive efforts, Gauteng continues to struggle with petty theft, street crime, and sporadic violent crimes, with certain high-risk areas in Johannesburg demanding greater caution from tourists. This persistent criminal activity, particularly muggings and carjackings, often targets tourists who are perceived as affluent and unfamiliar with local conditions, underscoring the importance of situational awareness (SABC News, 2021).

The province's security issues are deeply entwined with its socio-economic fabric, where high unemployment and disparities contribute to crime, sometimes exacerbated by social unrest, which poses additional risks to tourists. In response, the government and local authorities have intensified police patrols, fostered community policing, and partnered with tourism stakeholders to fortify tourist safety measures, including dedicated police units, dissemination of safety guidelines, and establishment of help centres.

For tourists, enhancing personal safety in Gauteng involves staying informed about no-go zones, safeguarding belongings, using trusted transport options, and choosing secure lodging. Technological solutions, like mobile safety apps, offer real-time advice and alerts, improving individual security

(Dragonfly, 2023). Engagement with local communities and guidance from local leaders can also provide safer and more authentic travel experiences.

The National Tourism Safety Forum (NTSF), a collaborative entity between the public and private sectors, tackles the challenges crime presents to the tourism industry. It does this by overseeing the integration and coordination of the Tourism Safety Programme along with the execution of a comprehensive, multifaceted Tourist Safety Action Plan spearheaded by the South African Police Service (SAPS). According to the Memorandum of Understanding that has been signed, there's a consensus that tourism issues should be incorporated into the agenda of the National Joint Operational and Intelligence Structure's (NATJOINTS) subcommittee on Crime and Migration. This inclusion guarantees that tourism concerns are regularly discussed and that, when needed, intelligence is gathered to investigate specific crimes against tourists.

The National Tourism Safety Strategy (NTSS) outlines immediate, mid-term, and long-term priorities for tourism safety, defining the duties and responsibilities of various levels of government and stakeholders in managing tourism safety initiatives. It fosters a collaborative spirit and mutual support among all parties involved. Moreover, the strategy highlights proactive, cooperative measures to reduce the chances of crime at tourist sites and in their operations, as well as the development of supportive programmes for tourists who become victims of crime, ensuring a unified approach to, and backing for the overall safety initiative.

Overall, Gauteng's security challenges mirror those in other global tourist hubs, suggesting a potential for learning from international best practices. A comprehensive strategy that encompasses safety infrastructure investment, community empowerment, and the promotion of responsible tourism is essential (Tourism Update, 2024). Vigilance, informed awareness, and adherence to local recommendations are imperative for tourists navigating Gauteng's complex safety landscape.

5.1.9. Travel Facilitation

Increasing the ease of travel to South Africa requires partnerships with relevant departments to ensure improved travel facilitation by implementing e-visas, tourist safety, airlift capacity and quicker turnaround times in processing tour operator licences. It requires collaboration with the Departments of Home Affairs, Transport, and the South African Police Service (SAPS).

South Africa continues to enhance ease of access for tourism priority markets. The visa regime has improved over the past few years. The improvement included the addition of the visa waiver regime for travellers from countries such as Qatar, Saudi Arabia, United Arab Emirates, New Zealand, Tunisia, Ghana, Cuba, and São Tomé and Príncipe in 2019.

In December 2022, Kenya and South Africa agreed that Kenyan travellers would qualify for visa-free entry for 90 days at the beginning of 2023. Before that, the Department of Home Affairs had implemented the e-visa regime for 15 countries to enable access to those markets not qualifying for a visa waiver. Kenya was part of the e-visa regime.

The e-visa system has been active in 14 countries since February 2022. Once the online visa system has been stabilised for the 14 countries, the aim is to make it available to more nationalities. The South African Government has announced the removal of visa requirements for Kenyans travelling to the country for up to 90 days. Where the e-visa regime had been implemented, there had been indications that its improvements were required (for example, outstanding documents were still being submitted in person in Nigeria instead of being uploaded online). This indicated that efficiency needed to be addressed.

An analysis conducted by SA Tourism on 24 priority markets across several regions (African, American, European, Asia, Australasia, and Middle East markets) indicated that the prioritised tourism markets enjoyed a relatively liberal visa regime. This suggested that more work needed to be focused on market development (e.g. Eastern Europe, Asia, and the African Continent).

While South African visa-free markets extend beyond prioritised tourism markets, ensuring that the e-visa system is effective at the implementation stage will unlock significant tourism volumes in those markets. Currently, there are more than 83 countries that qualify for visa-free status in South Africa.

5.1.10. Airlift

With the relaxation of COVID-19 travel restrictions worldwide and within South Africa, there has been a notable revival of flight operations.

The Airports Company South Africa (ACSA) has observed a substantial return of flight operations from both domestic and international carriers at South African airports. ACSA's data shows that by September

2022, the number of airlines that had resumed services to South Africa's three major international airports was 40 in Johannesburg, 17 in Cape Town, and 6 in Durban.

However, the reintroduction of substantial flight operations faces certain obstacles, particularly regarding international flights. The withdrawal of South African Airways from long-distance routes has resulted in overutilisation of the allocated frequencies in some markets. While code-sharing arrangements help maintain South Africa's visibility in the market, they should ideally lead to increased available seats in the country. Therefore, it's crucial to factor in these dynamics when considering strategic partnerships for South African Airways.

The Department of Tourism, in collaboration with other government entities and the private sector, will persist in overseeing and facilitating the eVisa system and tourist entry requirements. Additionally, efforts to recover and enhance South Africa's flight capacity are ongoing to ensure sufficient service for tourism markets.

5.1.11. Domestic Travel

The downfall of several local airlines has led to disruptions in domestic flight availability. This has notably influenced the cost of airfare and could further limit the domestic travel sector. Nevertheless, there has been a discernible improvement in the domestic travel scene, with more South Africans opting for local holidays, dubbed "Sho't Left," the COVID-19 restrictions. To meet the demands of this market, the tourism industry must tailor its offerings, crafting unique products and services for the domestic traveller.

5.1.12. International Relations

South Africa holds full membership status in the UNWTO. After being put forward by the UNWTO Commission for Africa (CAF) in 2021 and receiving the endorsement of the 24th UNWTO General Assembly, South Africa secured a seat on the UNWTO Executive Council for 2022 to 2025. This Executive Council position allows South Africa to advocate for the Southern African region and the broader African continent. Under the CAF framework, South Africa is committed to working in tandem with the SADC region and the entire African continent to advance tourism development interests.

5.2. Organisational Delivery Environment

5.2.1. *Impact of global trends on the Gauteng tourism sector*

- **Demographic shifts and market diversification:** The travel industry is dominated by younger travellers, particularly millennials and Gen Z, who prioritise experiential travel, adventure activities, and cultural immersion. In 2024, there was a significant increase in youth travel, with women accounting for most bookings. The senior population aged 60 and above, is becoming an important demographic in the tourism market. Trends indicate a diversification in destinations and vacation types favoured by older travellers, including longer stays and multi-generational trips (Tourvest, 2024). Gauteng's tourism sector has been prompted to diversify its market and cater to various age groups and interests.
- **Sustainable and eco-conscious travel:** Sustainable travel has emerged as a dominant global trend, with travellers showing heightened awareness of their environmental footprint and seeking eco-friendly destinations. In Gauteng, this has translated into an increased demand for sustainable accommodations, greener travel options, and experiences that contribute to conservation efforts. The province's response, including developing eco-tourism certifications for businesses and promoting low-impact tours, has helped attract environmentally conscious travellers, boosting the local economy while preserving natural resources.
- **The rise of health and wellness tourism:** The tourism sector in Gauteng has been on a transformative journey, especially in the aftermath of the global pandemic. The year 2024 is a testament to the resilience and adaptability of the region's tourism industry, shaped by global trends that have redefined travellers' expectations and experiences. This analysis delves into these trends and their ramifications on Gauteng's tourism, providing a comprehensive look at the province's strategic response and the emerging opportunities within the sector.
- **Economic impact and global events:** Tourism has experienced significant growth in 2024, driven by increased international travel, domestic tourism, and new tourism markets. Employment in the sector has also seen a positive trend, with job creation in travel and hospitality areas accelerating. The International Labour Organization (ILO) reports a substantial increase in tourism-related employment in 2024. Gauteng has strategically leveraged global events like the 2024 Soccer World Cup qualifiers and international music festivals to boost its global profile and brand it as a vibrant tourism destination.

- **Experiential and cultural tourism:** Experiential travel has become central to the tourism narrative, with travellers seeking authentic experiences that offer a deeper understanding of local cultures. With its rich cultural heritage and history, Gauteng has seen a rise in cultural festivals, local arts and crafts markets, and township tours. These experiences cater to the global demand for experiential travel, foster cultural exchange, and provide socio-economic benefits to local communities.
- **Technological and social trends:** Social media platforms like Instagram and TikTok influence travel choices, with tourism boards collaborating with influencers to promote destinations (MDPI, 2023). Geopolitical events and global economic conditions also impact travel patterns, with some regions benefiting from stability and growth while others face challenges. Technology has revolutionised the tourism industry, with Gauteng embracing it by integrating augmented reality in museums and cultural sites for immersive storytelling and data analytics to tailor experiences to individual preferences. This has improved service delivery and customer satisfaction, positioning Gauteng as a smart tourism destination. SA Tourism’s key marketing message is ‘Live again’ which sums up the call to come and explore, and immerse yourself in the culture, fauna, and flora. South Africa positions itself as a destination for experiences that appeal to the shift in post-pandemic tourism trends, focusing less on pure consumption and more on cultural exploration. A lot of good work has been done in this from a marketing and social media material aspect (Wiest, 2024).

Wiest (2024) highlights nine more trends to be aware of this year:

- **Time to shift from luxury to mainstream:** Post-pandemic, South Africa's 5-star tourism surged ahead, but mainstream 3-star tourism is facing hurdles, including a shortage of flight seats, which are now 50-60% more expensive than pre-2020. This reality is diverting travellers to other destinations, which can be seen in East Africa's tourism growth. Though 5-star luxury travel is enjoying rapid recovery, it is approaching capacity – and the priority is to reignite the mainstream segment in South Africa to ensure sustained tourism growth in 2024.
- **Open skies now:** Meaningful tourism growth necessitates legislative changes, which include open skies policies. The call is to address capacity constraints and ensure that anyone willing to fly to South Africa is allowed to.
- **Infrastructure reinvestment vital:** Tourism entities need to reinvest significantly in infrastructure. Customs and export restrictions on luxury coaches, for example, result in a shortage, among other challenges. The tourism industry is capital-intensive, and government amendments for tax-free coach imports will boost infrastructure.

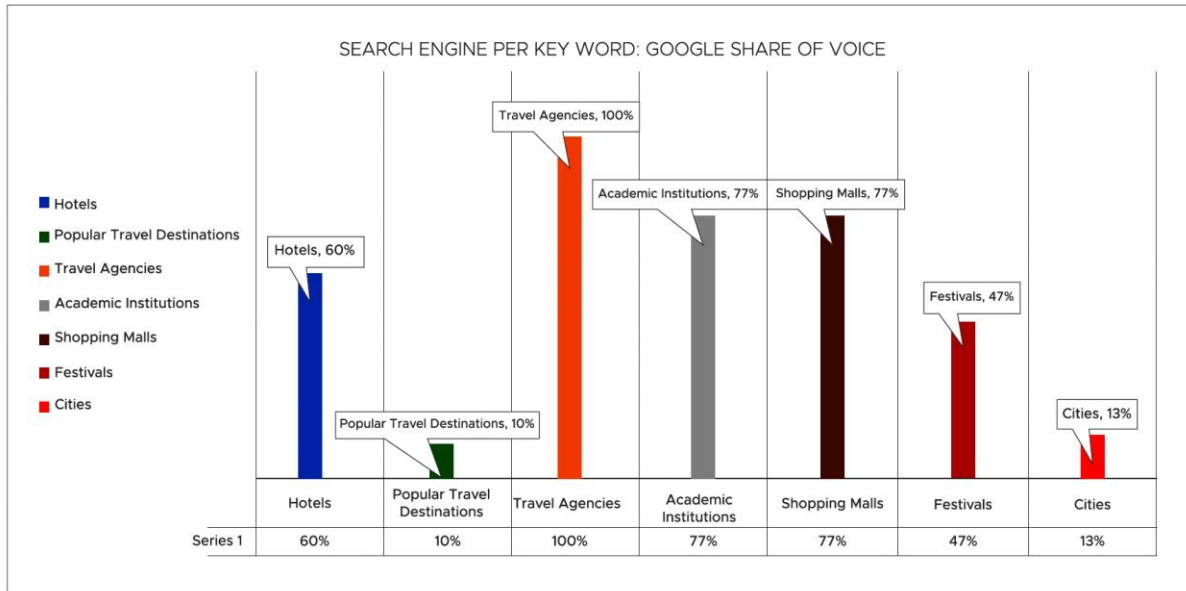
- **Streamline visa regulations:** Government deciding to boldly adjust visa regimes, e-visas, and visa-free arrivals will make a material difference in attracting tourists, as will taking recommendations discussed at TBCSA level and implementing them swiftly.
- **Fix educational sector challenges:** Educational shortcomings have led to numerous unfilled positions at Tourvest, for example. Scalability hinges on addressing deep structural issues in education, CATHSETA, and the lack of specific qualifications for inbound leisure. The shortage of tour guides and travel consultants, for instance, must be addressed.
- **It's about scalability:** We must grow tourism if we want to earn more foreign exchange for this country and create decentralised employment in rural areas – which we do. We're all trying very hard to get these things right, but we need to fix the bottlenecks to achieve scalability in the industry. Anything that hinders us from scaling up should be reviewed and reworked in a hurry, and that's not happening... yet.
- **Government quandary on tourism vs immigration control:** While the Minister of Tourism strives for accessibility, the Minister of Home Affairs must navigate the delicate balance of protecting borders and limiting illegal immigration. The tourism industry understands these challenges, and it is a delicate area for government to navigate while trying to promote travel to the country and maintain immigration control at our borders.
- **Connecting travelable parts of Africa:** According to Statista.com, of the 969.39 international tourist arrivals in 2022, the African continent attracted only 46.61, while Europe attracted 594.9 and the Americas, 156.18. This means Africa attracted less than 5% of global tourism, but it also means there are endless opportunities for the travelable parts of the continent. For instance, just focusing on sub-Saharan Africa, would include Ghana, Senegal, Ivory Coast, and Benin in West Africa; Ethiopia, Rwanda, Uganda, Tanzania, and Kenya in East Africa; and all SADC countries in southern Africa.
- **Multi-destination travel:** A surge in pan-African connectivity, as seen in Ethiopian Airlines, is enabling multi-destination travel. This novel trend attracts travellers by combining destinations like Cape Town and the Serengeti, or a safari in South Africa with a beach holiday in Zanzibar and fosters more significant global interest in the continent. From embracing sustainable travel practices to the fusion of technology and tradition, these trends are not just predictions; they are glimpses into

the future of how we will embark on our journeys, create memories, and connect with the world around us.

Overall, Gauteng's tourism sector has shown remarkable adaptability, responding proactively to global trends such as sustainable travel, technological advancements, health and wellness tourism, cultural and heritage tourism, global events, and demographic shifts. The sector's innovation and commitment to sustainable practices set the stage for a resilient future.

During the year under review, GTA conducted an impact evaluation study on events that the Authority supported during the 2022/23 FY. The survey sample included the Golden West Festival, World Constitutional Law, Rage Expo, Makhelwane Festival, Joy of Jazz, Delicious Festival, Rand Show, National Tourism Career Expo, Enter23 Congress, and Decorex Africa. Data was collected from events and analysed to determine the impact in different social settings, including economic and social impacts. The study confirmed jobs the event organisers reported while assessing the percentage of jobs created through their partnership with GTA. Eight thousand five hundred and eighty-eight (8588) jobs were created. Of these jobs, 45.95 per cent (39.46) were created through partnerships with GTA. On rand value, the impact evaluation study focused on both direct and indirect impact, including the effect per visitor non-ticket spending day, non-local producers' and event supporters' spending, and nonlocal media visitor spending. According to the study, the total captured spending in the impact area (direct impact) was R4 277 868 711 billion, and the indirect multiplier effect was R7 228 538 505 billion.

Over and above, GTA conducted a brand survey. Overall, Net Promoter Score indicated that visitors are happy with Gauteng as a destination. Ninety-eight per cent would likely recommend the tourism destination to their families and friends. Over and above, data for analysing Share of Voice (SoV) was collected through the Google search engine. It deliberated on hotels, popular travel destinations, travel agencies, academic institutions, shopping malls, festivals, and cities. Gauteng scored 55 per cent on SoV. The province of Gauteng dominated the share of voice through hotels at 60 per cent, Travel Agencies at 100 per cent, Academic Institutions at 77 per cent, and shopping malls at 77 per cent. Fair performance was witnessed through the province's performance at Festivals and poor performance at Travel Destinations and Cities. This SoV is summarized in the table graph below.

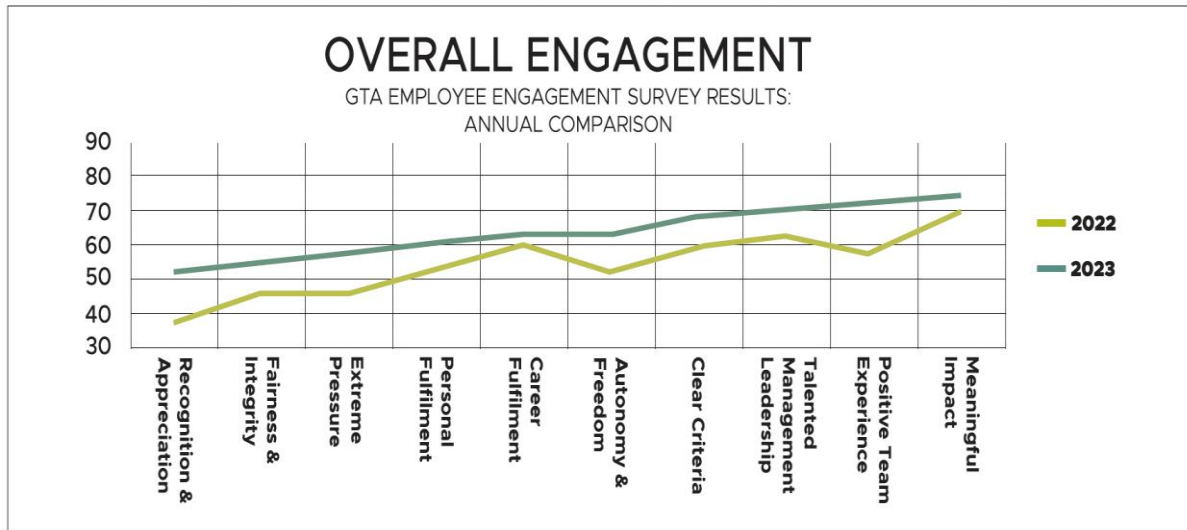


GTA reduced the number of challenges that it faced during the 2021/22 financial year. Challenges faced during 2021/22 included issues that led to low staff morale, triggered by the prolonged resolution of employee grievances, unfair discrimination, and inconsistencies in policy implementations.

More than ten organisational policies were reviewed. The review process was initiated through the development of a policy review committee. The committee aimed to facilitate procedures for developing new policies and reviewing them due for review. The committee provided leadership for the policy development programme, facilitated communication for policy development, benchmarked policies with strategic partners and sister GDED agencies, suggested new policy development and changes on existing policies and facilitated their approvals.

Over and above, and for policy development, a staff members’ committee was established to represent the interests of the staff vis-à-vis the Authority and maintain continuous contact between GTA and its staff members. The goal is to enable the smooth running of the organisation, thereby creating a conducive working environment.

GTA continued with staff engagements for the entire organisation to resolve issues that affect GTA as an employer and individual employees and thus improved from the 2021/22 staff engagement score. The Authority recorded 63 per cent on the staff engagement index. An Engagement Index of 63 per cent suggests that whilst there are components of engagement functioning well, there is still room for improvement. As presented in the graph below, there was an 8 per cent increase from 2021/22’s engagement index.



Omnicoor, 2023

The Authority improved its risk maturity programme, thereby moving from the baseline to the evolving level. A summary of the milestones for movement from baseline to evolving is presented below:

ERM Components	Baseline (40 percent)	Evolving (60percent)
Strategy and Appetite	Board discussions on risk environment and recognition of inherent risk appetite	Strategic risks have been captured and initial discussions on risk appetite
Governance and Accountability	Risk discussed ad-hoc through existing oversight structure at Board /Audit and Risk Committee	Basic oversight structure in place with Board/Audit and Risk Committee review of risk on a regular basis.
Risk Culture and Communication	Board and Executive awareness of risk	‘Tone from the Top’ messaging on risk with ad-hoc training and communication
Risk Cycle: Identification and Assessment	Ad-hoc risk information exists throughout the business	Siloed approach to risk identification and assessment. Risk coverage low and key process assessments incomplete
Controls and Resilience	Limited business understanding of control and resilience	Controls and effectiveness documented. Mitigation where appropriate. Basic control information and understanding of Business Continuity Management / Disaster Recovery
Analysis and Monitoring	Awareness of the need for analysis and monitoring	Limited analysis of risk information and monitoring in place

ERM Components	Baseline (40 percent)	Evolving (60percent)
Reporting and Disclosure	Informal and periodic discussions on risk limited to meeting disclosure requirements	Basic risk reporting to management, the Board and its Committee's to inform disclosure requirements
Assurance and Effectiveness	Basic assurance in place e.g., External Audit only	Siloed approach to risk management wider assurance activities

The Authority planned to move from evolving to mature in 2023/24, and these include the following components:

- Authority-wide understanding of the risk culture with risk-based performance metrics.
- Presented risk information, including categorisation provided by the business.
- Adequate controls and mitigations for all risks with clear links to resilience planning.
- Ongoing risk analysis, including aggregation, additional quantification, and clear monitoring structures.
- Formal risk reporting supported by escalation as required by consolidated 'risk function' and disclosure informed by existing processes.
- Clearly defined assurance structures with ownership throughout the business.

Progress against the 2023/24 risk targets were still to be assessed.

5.2.2. Key Policy Developments and Legislative Changes

There were no policy changes during the year under review.

5.3. Internal Environmental Analysis (SWOT)

PESTEL context scan

POLITICS

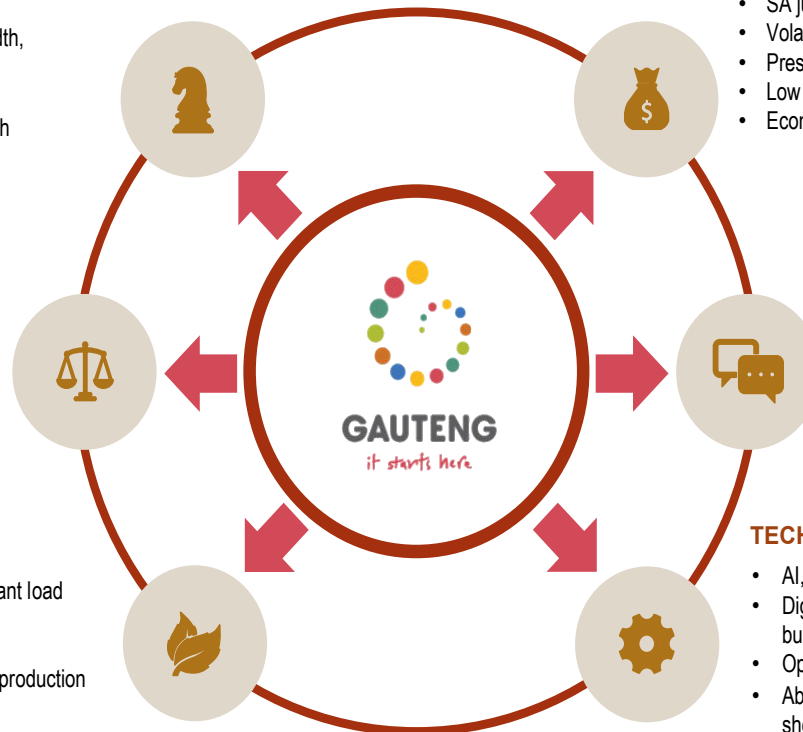
- Politicians need to participate as tourism champions
- Tourism is not always on the main political agenda
- Political and governance volatility in the province
- Political play and issues around Eskom, SOEs, bandwidth, spectrum, TERS, skills development and job creation
- SA Junk status - growth / non-growth
- The legacy of past discrimination is still evident, although changes are coming through

LEGAL & REGULATORY

- Impact of National Treasury and the South African Revenue Service (SARS) tax regimes
- National and provincial tourism dynamics at play
- Influence of competition regulations and Competitions Commission
- Sector B-BBEE codes, regulations, ownership and shareholding – transformation beyond compliance
- Regulatory delays and red tape stifles business

ENVIRONMENT

- Power generation (Electricity distribution) crisis – Constant load shedding has an environmental impact and damage old infrastructure
- Growing demand for more sustainable and responsible production processes and practices
- Greater conservation awareness in green cities
- Global awareness of conservation and attraction to conservancies



ECONOMY

- Only 7m out of 47m South Africans pay tax as of 26/06/23
- The economy is very slow and severely pressurised
- Limited local disposable income and high unemployment
- National development goals of the government
- SA junk status
- Volatile SA/US\$/Euro exchange rate and resultant repo rate in SA
- Pressure from competitors and market access to source markets
- Low economic development and growth.
- Economic migration

SOCIAL

- Rising unemployment, especially among the youth up to 35 and resultant poverty
- Global recession and social decline
- Skills shortage vs unemployed – will we be able to stimulate skills shortage demand while creating employment opportunities
- Demographic shifts and cultural attitudes
- Rich cultural heritage and history of Gauteng
- Increasing young population (Millennials)

TECHNOLOGY

- AI, cyber tourism and the changing dynamics as a result
- Digital transformation, digital disruption and the growth of 4IR as a business and life reality
- Operational technology infrastructure vulnerable to cyber security threats
- Ability to be connected from anywhere/ everywhere, except for load-shedding issues
- Ability to promote Gauteng on global digital platforms and to offer high tech product reservations access

BUSINESS CONTEXT	Theme	Factor Description	Factor impact prospect		Opportunity to contribute to improving or addressing the factor through the current government priorities
			Level	Positive or Negative	
POLITICAL	International Relations	<ul style="list-style-type: none"> International sentiment from critical countries – Africa inbound, UK, SA 	High	+	<ul style="list-style-type: none"> e-Visa regime GTA must influence the debate and conversations
	Government Administration	<ul style="list-style-type: none"> The legacy of past bureaucracy is still evident, although changes are coming through 	Moderate	-	<ul style="list-style-type: none"> Engage political principals and decision-makers. Align leadership structure to the strategy for the best political result. Influence the awarding of RFPs so that business can get done. Influence red-tape relaxation Use and instigate presidential and provincial hotlines with a firm tourism agenda. Participate in the Gauteng Premier Ethics Advisory Council Fight corruption, institutionalize integrity and promote ethical leadership
		<ul style="list-style-type: none"> Political decision-makers often do not regard tourism as a priority agenda item 	High	-	
	Tourism Industry	<ul style="list-style-type: none"> Tourism is a quick recovery sector following political change 	High	+	<ul style="list-style-type: none"> Economy and employment through developing the tourism industry. Gauteng Tourism Master Plan Gauteng Tourism Sector Strategy Faster and more inclusive economic growth Tourism Master Plan Relaxation of VISA regime
		<ul style="list-style-type: none"> Increased confidence of travel intermediaries, especially in SA and globally 	Moderate	+	

	Transformation	<ul style="list-style-type: none"> Job creation and SMME development are political priorities 	High	+	<ul style="list-style-type: none"> Faster and more inclusive economic growth Tourism Master Plan Gauteng Tourism Sector Strategy Tshepo 1 million Township Economic Revitalisation
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HOME AFFAIRS processes that impact the landscape			
DIRCO process from the BRICS Summit	Outcomes and SARS pronouncements on tax implications on the remote working visas	The trusted employer scheme will be gazetted by December	Group visas must comply with legislation

PRESIDENTIAL COUNCIL focus areas				
Security & Visas	Transport & Infrastructure	Education & Skills	Investment & Development	Markets And Marketing
<ul style="list-style-type: none"> Safety, crime & statistics E-visas & biometrics Tourist visas 	<ul style="list-style-type: none"> NTPR National air access Land & air borders 	<ul style="list-style-type: none"> Know & Love RSA SKILLS for 2030 Understanding tourism 	<ul style="list-style-type: none"> Investment facilitation and incentives Tourism infrastructure Public infrastructure 	<ul style="list-style-type: none"> Foreign tourism strategy New markets strategy Domestic tourism strategy

BUSINESS CONTEXT	Theme	Factor Description	Factor impact prospect		Opportunity to contribute to improving or addressing the factor through the current government priorities
			Level	Positive or Negative	
ECONOMIC	Economic growth	<ul style="list-style-type: none"> The economy is very slow and severely pressurised as it is not growing at levels that are desirable for tackling socioeconomic challenges of unemployment, poverty, and inequality 	High	–	<ul style="list-style-type: none"> Faster and more inclusive economic growth Mobilising society to support the plan and exploring a social compact to reduce poverty and inequality through investment and employment. Reducing the cost of living for low-income and working-class households Gauteng Economic Plan Bringing about faster economic growth, higher investment, and greater labour absorption. Mobilising society to support the plan and exploring a social compact to reduce poverty and inequality through investment and employment.
		<ul style="list-style-type: none"> The economy is very slow and severely pressurised as it is not growing at levels that are desirable for tackling socioeconomic challenges of unemployment, poverty, and inequality 	High	–	<ul style="list-style-type: none"> Faster and more inclusive economic growth Mobilising society to support the plan and exploring a social compact to reduce poverty and inequality

BUSINESS CONTEXT	Theme	Factor Description	Factor impact prospect		Opportunity to contribute to improving or addressing the factor through the current government priorities
			Level	Positive or Negative	
		<ul style="list-style-type: none"> Limited local disposable income and high unemployment 	High	-	<p>through investment and employment.</p> <ul style="list-style-type: none"> Reducing the cost of living for low-income and working-class households Gauteng Economic Plan Bringing about faster economic growth, higher investment, and greater labour absorption. Mobilising society to support the plan and exploring a social compact to reduce poverty and inequality through investment and employment.
	Economic Infrastructure	<ul style="list-style-type: none"> Rollout of Special Economic Zone programmes in the province 	Moderate	+	<ul style="list-style-type: none"> Build Strong Economic infrastructure. Radical economic transformation
ECONOMIC	Crime	<ul style="list-style-type: none"> Safety concerns impact the economic activity directed at Gauteng 	High	-	<ul style="list-style-type: none"> People living in South Africa feel safe and have no fear of crime - a well-resourced professional institution staffed by highly skilled officers who value their work, serve the community, safeguard lives and property without discrimination, protect the peaceful against violence, and respect the rights of all to equality and justice. Tourism safety monitors
		<ul style="list-style-type: none"> Perceived xenophobia 	High	-	

BUSINESS CONTEXT	Theme	Factor Description	Factor impact prospect		Opportunity to contribute to improving or addressing the factor through the current government priorities
			Level	Positive or Negative	
	Economic Sector	<ul style="list-style-type: none"> Rise in business confidence after regime change 	Moderate	+	<ul style="list-style-type: none"> A higher investment rate, with public sector investment crowding in private investment. Partnership with the private sector, policy certainty and building confidence in the economy's long-term growth.
	Government administration	<ul style="list-style-type: none"> The spread of accredited and quality-assured products will stimulate tourism 	High	+	<ul style="list-style-type: none"> Economy and employment through developing the tourism industry. Gauteng Tourism Master Plan Gauteng Tourism Sector Strategy Economic transformation and job creation Township Economic Revitalisation Township and solidarity
		<ul style="list-style-type: none"> Integration of various disciplines or channels of tourism is important 	High	+	
		<ul style="list-style-type: none"> The rollout of the Township Economy Revitalisation Programme has not yielded tangible transformation 	Moderate	-	
ECONOMIC	Tourism Industry	<ul style="list-style-type: none"> Prioritisation of tourism for economic recovery 	High	+	<ul style="list-style-type: none"> MTSF Priority sector Gauteng Tourism Master Plan
		<ul style="list-style-type: none"> The conference marketplace is changing due to digitisation and calls for new and innovative strategies 	Moderate	+	

BUSINESS CONTEXT	Theme	Factor Description	Factor impact prospect		Opportunity to contribute to improving or addressing the factor through the current government priorities
			Level	Positive or Negative	
SOCIAL	Transformation	<ul style="list-style-type: none"> Quality township-based products will enhance township tourism and job creation. 	High	+	<ul style="list-style-type: none"> Faster and more inclusive economic growth Tourism Master Plan Gauteng Tourism Sector Strategy Township Economic Revitalisation
	DEPARTMENTAL COST CONTAINMENT MEASURES	<ul style="list-style-type: none"> Internal Cost Containment directives might impact the spending and ability to deliver 	VERY High	-	<ul style="list-style-type: none"> Mobilise partnerships and joint activity to gain access to marketing and development investment beyond own limited funds
	Tourism Industry	<ul style="list-style-type: none"> Rich cultural heritage and history of Gauteng 	High	+	<ul style="list-style-type: none"> Economy and employment through developing the tourism industry. Gauteng Tourism Master Plan Gauteng Tourism Sector Strategy Promoting and marketing Gauteng as a globally competitive destination of choice with enhanced uptake of its complete tourism offering
		<ul style="list-style-type: none"> Erosion of culture of hospitality and traditional hospitality values evident amongst younger generations 	Moderate	-	
		<ul style="list-style-type: none"> Restore loyalty and pride in self and destination 	Moderate	+	
SOCIAL	Inclusive Economy	<ul style="list-style-type: none"> Increasing young population (Millennials) 	High	-	<ul style="list-style-type: none"> Faster and more inclusive economic growth Strengthen youth service programmes and introduce new, community-based programmes to offer young people life-skills
		<ul style="list-style-type: none"> Youth and female unemployment have reached crisis proportions 	High	-	

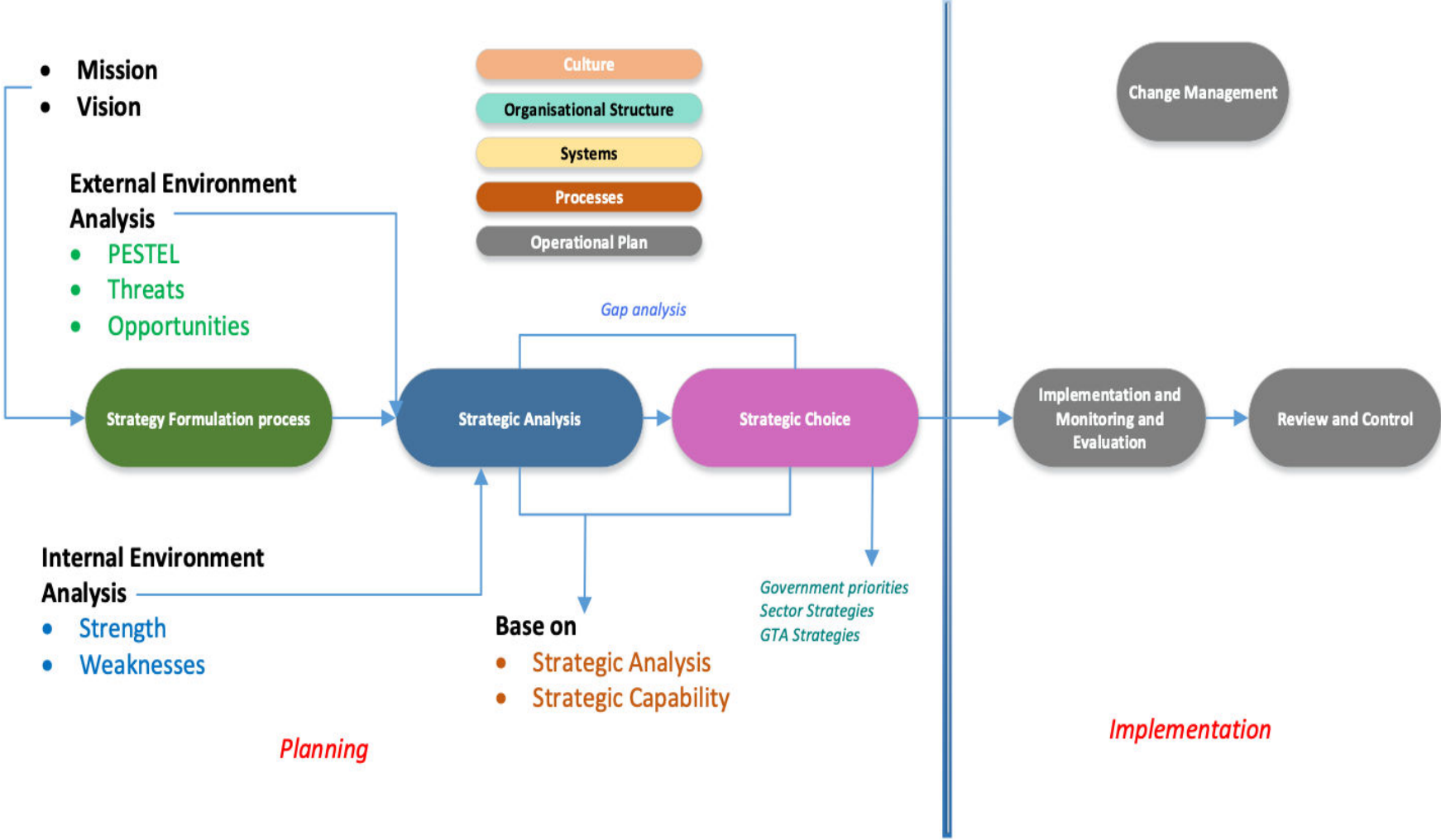
BUSINESS CONTEXT	Theme	Factor Description	Factor impact prospect		Opportunity to contribute to improving or addressing the factor through the current government priorities
			Level	Positive or Negative	
	Skills	<ul style="list-style-type: none"> Skills available, limited opportunities 	High	-	training, entrepreneurship training and opportunities to participate in community development programmes. <ul style="list-style-type: none"> Public employment should expand, with a focus on youth and women. Improving the quality of education, skills development, and innovation
		<ul style="list-style-type: none"> Need more investment in basic training and building a tourism culture in Gauteng 	Moderate	+	
		<ul style="list-style-type: none"> Lost generation – the erosion of free thinking 	Moderate	• –	
	Transformation	<ul style="list-style-type: none"> Inequality and township-based poverty remains an issue 	High	• –	<ul style="list-style-type: none"> Faster and more inclusive economic growth Tshepo 1 million
TECHNOLOGICAL	Economic infrastructure	<ul style="list-style-type: none"> There has been technological investment in the province 	Moderate	+	<ul style="list-style-type: none"> Expand science, technology, and innovation outputs by increasing government research and development spending and encouraging industry to do so. Drive innovation and Digital revolution 4IR Programme
		<ul style="list-style-type: none"> Advancement in recent years and future vision for Industry 4.0 	High	+	
		<ul style="list-style-type: none"> High mobile penetration and internet usage 	Moderate	+	

BUSINESS CONTEXT	Theme	Factor Description	Factor impact prospect		Opportunity to contribute to improving or addressing the factor through the current government priorities
			Level	Positive or Negative	
		<ul style="list-style-type: none"> The digital revolution continues, and the high use of mobile platforms 	Moderate	+	
	Tourism industry	<ul style="list-style-type: none"> Ability to promote Gauteng on global mobile platforms and to offer high-tech product reservation access 	Moderate	+	<ul style="list-style-type: none"> Economy and employment through developing the tourism industry. Gauteng Tourism Master Plan Gauteng Tourism Sector Strategy Promoting and marketing Gauteng as a globally competitive destination of choice with enhanced uptake of its complete tourism offering
		<ul style="list-style-type: none"> Ability to engage the international target market 	Moderate	+	
ENVIRONMENTAL	Government Regulation	<ul style="list-style-type: none"> Strong environmental record and regulatory system still in place 	High	+	<ul style="list-style-type: none"> A capable, ethical, and developmental state/ public service Regional partnerships Implement environmental sustainability and resilience plan. Implement an Integrated Resource Plan Economy and employment through developing the tourism industry. Gauteng Tourism Master Plan Gauteng Tourism Sector Strategy Promoting and marketing Gauteng as a globally competitive destination of choice with enhanced uptake of its complete tourism offering
	Environmental management	<ul style="list-style-type: none"> Greater conservation awareness in green cities 	High	+	
		<ul style="list-style-type: none"> Global awareness of conservation and attraction to conservancies 	High	+	
	Tourism product	<ul style="list-style-type: none"> A gateway to known environmental experiences but needs to promote Gauteng's own as well 	Moderate	+	

BUSINESS CONTEXT	Theme	Factor Description	Factor impact prospect		Opportunity to contribute to improving or addressing the factor through the current government priorities
			Level	Positive or Negative	
		<ul style="list-style-type: none"> • Opportunity to offer regional linkages with other conservation products – Mpumalanga, Northwest, SADC, and East Africa 	Moderate	+	
		<ul style="list-style-type: none"> • Able to offer sustainable tourism products, maximise global conservation trends and attract more high-end market 	Moderate	+	
LEGAL	Government Regulation	<ul style="list-style-type: none"> • Regulatory stability provides optimism and travel-conducive regulations 	High	+	<ul style="list-style-type: none"> • Building a capable and developmental state. • Reduced cost of regulatory compliance, especially for small- and medium-sized firms
		<ul style="list-style-type: none"> • Legislation changes in favour of local product 	Moderate	+	
		<ul style="list-style-type: none"> • Relaxation of regulations will favour international investment 	Moderate	+	
		<ul style="list-style-type: none"> • Relaxation of rigid rules positive 	Low	+	

BUSINESS CONTEXT	Theme	Factor Description	Factor impact prospect		Opportunity to contribute to improving or addressing the factor through the current government priorities
			Level	Positive or Negative	
	Economic Sector	<ul style="list-style-type: none"> The political will to enable the growth of business following political change 	High	+	<ul style="list-style-type: none"> Economic Plan MTSF Priority sectors
	Tourism Sector and Infrastructure	<ul style="list-style-type: none"> Tourism has a significant role to play in transformation and economic development as reflected in regulatory frameworks 	High	+	<ul style="list-style-type: none"> Tourism Charter Economy and employment through developing the tourism industry. Gauteng Tourism Master Plan and Sector Strategy Promoting and marketing Gauteng as a globally competitive destination of choice with enhanced uptake of its complete tourism offering Build solid economic infrastructure. Radical economic transformation

6. APPLIED STRATEGIC PLANNING PROCESS



PART C: MEASURING OUR PERFORMANCE

7. TOURISM AGENDA



7.1. International Tourism Marketing Prioritisation and Investment Framework

In 2016/17, South African Tourism developed the Marketing Prioritisation and Investment Framework (MPIF) that focused on identifying markets and optimising marketing investments across the identified target markets. In early 2020, in consultation with Provincial Tourism Authorities and Industry, South African Tourism initiated a revision of the Marketing Prioritisation and Investment Framework, using 2019 as the base year to review the portfolio. The framework used 33 variables related to performance, outlook, South Africa’s ability to win in the market, return on past investments, and other criteria. A total of 24 markets were identified for prioritisation and were segmented into 16 growth and 8 defend markets, with an additional set of watchlist markets.

Segment	Description	National Service Model	Gauteng Service Model
Defend Markets	<ul style="list-style-type: none"> Markets where South Africa holds a substantial market share and requires continued intervention to ensure arrivals. These markets hold both volume and value importance for South Africa. South African Tourism needs to maintain or defend its share. 	Maintain the existing share in the markets outbound.	Maintain the existing share in the markets outbound.
Growth Markets	<ul style="list-style-type: none"> Markets that hold considerable outbound potential. However, the share of South Africa in outbound has growth potential. These markets provide an ample opportunity to grow based on their size. 	Elevate South Africa’s position in the market relative to long-haul competitors.	Elevate Gauteng’s value proposition by leveraging the relationship with Foreign Missions based in Gauteng.
Watchlist Markets	<ul style="list-style-type: none"> Markets that hold reasonable outbound potential. However, South Africa's current share in outbounds is low. These markets provide an opportunity for nurturing and investing for future growth and must be kept on the watchlist. 		Positioning Gauteng products through the smart use of Marketing Technology and partnering with Distribution channel

Figure 34: Priority source markets identified to grow tourism arrivals into South Africa, 2020-2025



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

The watchlist markets by region are:

Europe	Asia Pacific	Americas	Africa Air
<ul style="list-style-type: none"> • Switzerland • Belgium • Sweden • Ireland • Denmark • Portugal 	<ul style="list-style-type: none"> • Singapore • Malaysia • United Arab Emirates (UAE) 	<ul style="list-style-type: none"> • - 	<ul style="list-style-type: none"> • Democratic Republic of Congo (DRC) • Tanzania
<ul style="list-style-type: none"> • Austria • Norway • Finland • Turkey 	<ul style="list-style-type: none"> • New Zealand 	<ul style="list-style-type: none"> • Argentina 	<ul style="list-style-type: none"> • Ghana • Angola • Uganda • Ethiopia

7.2.Domestic Tourism Marketing

Domestic tourism is the backbone of any country or destination's marketing efforts. The drive to position Gauteng as the preferred destination for tourism, trade, investments, the creative sector, and competitive sports starts with locals' appreciation of their own country, province, and locality. Therefore, the GTA's domestic tourism marketing efforts are in the context of domestic first, regional, and international as complementary but not linearly. As demonstrated over the past years of the COVID-19 pandemic, the strength of the country's domestic tourism base helped keep tourism afloat, preserve some of the tourism and value-chain jobs and lift the country's mood amid despair and fear.

For destination Gauteng, the domestic marketing focus is also informed by the current administration's support and focus on townships, informal settlements, and hostels. Together with other tourism hubs and neighbourhoods, these spaces represent the actual DNA of the brand Gauteng, with the core-essence being

about the 15+ population of the province, with the majority found in these nodes. Promoting domestic products, events, offerings, and experiences aligns with provincial priorities, supports buying, living, and exploring local campaigns, and seeks to grow the domestic revenue base and empower the destination to be robust, resilient, and absorb future disasters. Accordingly, the efforts to invest in domestic marketing initiatives as per the market's investment framework are geared towards the overall building process of the Gauteng, we all want. They seek to stimulate demand to sustain and create more jobs in townships, informal settlements, and hostel nodes, which can benefit and form part of the broader visitor economy value chain.



The domestic marketing approach is in line with the country's District Development Model (DDM,) which calls for a joint-up whole-of-government approach to development and governance matters. In the context of Gauteng, the five development corridors represent the identified beneficiaries of tourism marketing, development, and management. As per the marketing strategy, the region of Johannesburg, which is the financial and commercial hub, home of the creative sector, sports entertainment, and most extensive corporate headquarters network, serves as the anchor destination and attract brand. The visitors will thematically be dispersed to the other regions in a coordinated manner to ensure the visitor experience is memorable, sharable, and enjoyable. Tshwane is the diplomatic capital and home to hundreds of foreign missions and diplomatic corps, only second to Washington DC in the United States. The region is also home to the country and Africa's automotive sector, Research and Development, leading universities, and sprawling townships. It allows for the appropriate packaging and selling of these experiences and offerings to the domestic market, particularly locals. The City of Ekurhuleni is the province's metropolis, built on a major airport's economic functioning.

It is also the manufacturing and industrial base for the country, with the Springs in-land port serving the rest of the inner regions. Aviation and air access are also vital content aspects for this city, together with the length and breadth of the region's townships, arts and graffiti murals, and leading heritage sites and museums. The adjacent regions of West Rand, which is the home to Lanseria Airport, the Cradle of Humankind World Heritage Sites, and the townships of Kagiso, Mansenville, Merafong etc., represent the key offerings in the region. Sedibeng is the “coastal” region of the province, with water sports, casinos, outdoor adventure, and township tourism standing out. It is a crucial #GPshotleft weekend power break destination with the Dinokeng sub-region in Tshwane. All these critical differentiators per region are therefore aggregated at the provincial level to ensure maximum geographic spread of tourism marketing and development, impactful visitor experience and guide to brand communications and messaging work to position overall destination Gauteng as not just a business destination but a leisure destination for locals and visitors alike.

Lifestyle, culture, heritage, and sports entertainment represent vital elements of the destination Gauteng story and brand essence. We are a lifestyle and inspirational destination. We house the most extensive collection of media and entertainment houses. The cultural and heritage offerings are elevated through thematic marketing and packaging via the tourism and heritage route, the jazz heritage route, the sports tourism route, the pink route, #MusicalGP, #CreativeGP and #SportingGP sub-brands positioning. We use these platforms to amplify our destination marketing content, provide market access opportunities to SMMEs, increase job opportunities, and support the Working for Tourism programmes overall. The marketing investments done in these areas of work are collaborated with sister marketing agencies, sports and creative sector bodies, leading sister attractions and products and persons of significant influence in these spaces to leverage opportunities associated with building our brand strength, increase awareness of the importance of tourism and showcase the interlinkages between sports, heritage, tourism, creative sector and other part of the visitor economy value-chain like transport, ICT and manufacturing.

7.3.Informing Strategic Projects

7.3.1. Logic Framework

IMPACT:		
1. Gauteng is recognised as a globally competitive destination of choice		
ULTIMATE OUTCOME:		
1.1. Economic Growth, Job Creation and Infrastructure		
1.1.1. INTERMEDIATE OUTCOME	(a) Tourism contributed to the GPG Economy	(b) Positive impact on tourism growth among hosting communities
1.1.1.1. IMMEDIATE OUTCOME	(a) Value generated through tourism uptake	(b) Inclusive and sustainable tourism growth
IMPACT:		
2. Sustainable tourism development to accelerate the transformation of the tourism sector		
ULTIMATE OUTCOME:		
2.1. Reduced inequality within and among communities		
2.1.1 INTERMEDIATE OUTCOME	(a) Visitor experience enhanced	(b) Township communities' empowerment and youth employability.
2.1.1.1. IMMEDIATE OUTCOME	(a) Tourism offering differentiation (b) Transformed local tourism (c) Tourism share increased	(b) 1. A range of youth-directed upskilling and youth employment opportunities developed at Gauteng attractions and experiences (b) 2. Tourism Entrepreneurship and SMMEs Development

7.3.2. *Objectives and Outcomes of Strategic Projects*

IMPACT: Gauteng is recognised as a globally competitive destination of choice			
ULTIMATE OUTCOME: Economic Growth, Job Creation, and Infrastructure Development			
INTERMEDIATE OUTCOME: Tourism contributed to the GPG economy			
IMMEDIATE OUTCOMES	OUTPUTS	ACTIVITIES	INPUTS
Value generated through tourism uptake	Greater awareness of the Gauteng tourism brand	<ul style="list-style-type: none"> • Drive brand Gauteng’s public relations and editorial programme • Collectively position the brand of Gauteng through the custodianship of the tourism sector • Undertake a market positioning exercise in domestic and international markets. • Develop and implement Gauteng’s market investment framework. • Crystalize and communicate the Gauteng offering. • Improve product packaging to promote the unique products Gauteng has to offer. • Improve research and provision of data. • Youth-directed travel packaging and product offering for youth tours, small youth groups and individual youth travellers – unleash the considerable potential of youth travel to Gauteng in groups and as individual travel. • Lead brand Gauteng’s bookable digital footprint • Develop, implement, and manage all electronic marketing activities, including the GTA’s website. • Develop, implement, and manage the GTA’s social media platform. • Develop, implement, and execute the GTA’s e-marketing strategy. • Provide online support to Gauteng tour operators and events managers through the Gauteng.net site. • Youth-directed e-travel social media drive and product offering to unleash the considerable potential of youth travel to Gauteng in groups and as individual travellers. 	Financial Resources Policies <ul style="list-style-type: none"> • Marketing • Endorsements • Logistics • PFMA • Spokespersons • Tourist safety measures Social Compacts <ul style="list-style-type: none"> • Integrated marketing ecosystem Partnership <ul style="list-style-type: none"> • Trade relationships • Joint marketing agreements • Key media relationships

	Improved Business and Trade relations	<ul style="list-style-type: none"> • Develop joint marketing agreements. • Facilitate trade networking and CRM. • Develop influencers programme. • Stimulate community product updates with trade. • Forums 	<ul style="list-style-type: none"> • GPG development units • Digital content partners
	Quality-assured visitor information is provided	<ul style="list-style-type: none"> • Creating an enabling environment for visitors • Undertake initiatives for improving visitor services and visitor experiences. • Manage the VICs and partners. • Train staff working in VICs. • Host tourism information awareness about Gauteng destinations, products, opportunities, and experiences 	

IMPACT: Gauteng is recognised as a globally competitive destination of choice

ULTIMATE OUTCOME: Economic Growth, Job Creation, and Infrastructure

INTERMEDIATE OUTCOME: Tourism contributed to the GPG economy

IMMEDIATE OUTCOMES	OUTPUTS	ACTIVITIES	INPUTS
Inclusive and sustainable tourism growth	Tourism development where emerging entrants were introduced into the tourism value chain	<ul style="list-style-type: none"> • Community-centric tourism activities - implement projects for stimulating participation / creation of new players to enhance beneficiation. • Leverage events for coverage in trade, local and community media – and, where appropriate, national mainstream media • Invite and host appropriate media at event/ project/ initiative. 	Financial Resources Policies <ul style="list-style-type: none"> • Marketing • Endorsements • Logistics • Transformation

	Enhanced stakeholder-centric communication regime for concurrent tourism development and promotion	<ul style="list-style-type: none"> • Maintain and strengthen the CRM database and leveraged it for stakeholder engagement based on quality market intelligence and content development through: <ul style="list-style-type: none"> - CRM activity, including a quarterly electronic newsletter to effectively communicate GTA's projects, impact, and successes to external stakeholders. - Showcase the offering of the province in the CRM activity. - Engaged with electronic newsletter to share GTA's projects, impact, and successes with external stakeholders. - Youth-directed travel packaging and product offering for youth tours, small youth groups and individual youth travellers 	<ul style="list-style-type: none"> • Tourist safety measures <p>Social Compacts</p> <ul style="list-style-type: none"> • Integrated marketing ecosystem • Local tourism communities • Entrepreneurs' development <p>Partnership</p> <ul style="list-style-type: none"> • Trade relationships • Joint marketing agreements • Key media relationships
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IMPACT: Gauteng is recognised as a globally competitive destination of choice			
ULTIMATE OUTCOME: Economic Growth, Job Creation, and Infrastructure			
INTERMEDIATE OUTCOME: Tourism contributed to the GPG Economy			
IMMEDIATE OUTCOMES	OUTPUTS	ACTIVITIES	INPUTS
Value generated through tourism uptake.	Bid for events by proactively identifying, attracting, and providing support in hosting a diverse range	<ul style="list-style-type: none"> • Develop a mega and significant events pipeline for the next 5 to 10 years. • Working with strategic partners bid for to for significant events. • Support hosting of signature, regional and township events • Leveraging events for income generation, marketing, and brand building • Showcase the diverse cultural offering of Gauteng for onward growth and greater community cohesion while embracing the value of diversity. • Evaluate all potential events to determine whether they could be classified as mega or major or whether they fall within any of the other bid categories. 	<p>Financial Resources</p> <p>Policies</p> <ul style="list-style-type: none"> • Marketing • Endorsements • Logistics • Tourist safety measures

	<p>of world-class events in Gauteng - international, regional, local, community and township events for the province.</p>	<p>Proactively attract high-yield business events to Gauteng, such as Meetings, Incentives, Conferences and Events (MICE), by</p> <ul style="list-style-type: none"> • Identifying, bidding, and securing major international and national MICE events. • Supporting delegate-boosting activities • Supporting hosting of onsite MICE events • Implementing MICE trade engagement activities 	<p>Social Compacts Partnership</p> <ul style="list-style-type: none"> • Event value chain • Event organisers • Vertical industry leaders • Provincial government structures • MICE value chain partnerships
	<p>Support hosting Mega, Major, and Significant events held in Gauteng.</p>	<p>Partnership with the private sector, associations/ federations/ stakeholders, municipalities, and others to become proactive in driving significant events in the province and regions by</p> <ul style="list-style-type: none"> • Using the events calendar, identify gaps for the diversity of significant events from a location, theme, and type of event point of view. Initiate and encourage events that fill the identified gaps. • Provide the necessary operational support to host mega and major events. • Assisting in the marketing of events to help ensure event attendance and leverage. • Provide support tools to the private sector, federations, associations, municipalities, and others so that they can identify, bid for and host successful, world-class, significant events. • Creating an interactive and dynamic calendar of events for the province, including all mega, major, significant, and local events, and assisting the regions in creating regional calendars. 	

IMPACT: Gauteng is recognised as a globally competitive destination of choice

ULTIMATE OUTCOME: Economic Growth, Job Creation, and Infrastructure

INTERMEDIATE OUTCOME: Positive impact on tourism growth among hosting communities			
IMMEDIATE OUTCOMES	OUTPUTS	ACTIVITIES	INPUTS
Inclusive and sustainable tourism growth	<p>Stimulated Economic growth, job creation and social cohesion in township communities, though,</p> <ul style="list-style-type: none"> • Incubated projects and implemented projects for township events. • Incubated township events held in Gauteng. 	<ul style="list-style-type: none"> • Implement events incubation projects by attracting new events or grow existing ones that are uniquely reflective and enhance Gauteng's brand /image and have the potential to be developed into mega, major or significant events (these may start as local or even community events) (incubator events); and provided support to community and local events that focus on talent and legacy development which are aligned to provincial strategic objectives, thereby building and nurturing true partnerships with interested private sector parties with a view of handing over the management of developed/ supported events when they are self-sustainable. • Providing support to at least 30 talent / legacy development or incubator events per annum. • Mobilise role players to become proactive in driving local and community events in the regions; create an interactive and dynamic calendar of events for the province inclusive of all local events and assist the regions in creating regional events calendars that are inclusive of all event types, including community events, by <ul style="list-style-type: none"> - Using the events calendar, track the number of local events in the province by type, theme and location and compare them against the target. - Providing support tools to the private sector, federations, associations, municipalities, and others to identify, support, promote, and host successful local and community events. - Assisting in promoting local and community events to help ensure that event attendance, and hence vibrancy, is maximised. 	<p>Financial Resources</p> <p>Policies</p> <ul style="list-style-type: none"> • Marketing • Endorsements • Logistics • Tourist safety measures <p>Social Compacts</p> <ul style="list-style-type: none"> • Event value chain <p>Partnership</p> <ul style="list-style-type: none"> • Event organisers • Vertical industry leaders • Provincial government structures • MICE value chain partnerships

IMPACT: Sustainable tourism development to accelerate the transformation of the tourism sector

ULTIMATE OUTCOME: Reduced inequality within and among communities

INTERMEDIATE OUTCOME: Visitor experience enhanced			
IMMEDIATE OUTCOMES	OUTPUTS	ACTIVITIES	INPUTS
Tourism offering differentiation	Enhancement of tourism infrastructure influenced	Influence the upgrade and maintenance of tourism infrastructure with partners in government structures and the product trade by <ul style="list-style-type: none"> Identifying maintenance issues in current assets and resolving them with local municipalities and other tourism partners Securing stakeholder buy-in on future tourism infrastructure and maintenance plans. Supporting new investment opportunities relating to the tourism sector Developing a differentiated tourism offering with quality products and services 	Financial Resources Policies <ul style="list-style-type: none"> Marketing Endorsements Logistics Transformation BEE Tourist safety measures Social Compacts <ul style="list-style-type: none"> Tourism development ecosystem Partnership <ul style="list-style-type: none"> Development community Trade partnerships for market access
	<ul style="list-style-type: none"> Showcased the value of tourism for investment, social development, and job creation. Attracted more funding and Investment into the tourism sector by the public and private sectors and foreign investors 	<ul style="list-style-type: none"> Utilise the data gained from the Tourism Economic Account and interactive model to determine the value of new investments and developments in the sector. Market and showcase the value generated from direct and indirect tourism opportunities through PR and CRM activity 	

IMPACT: Sustainable tourism development to accelerate the transformation of the tourism sector
ULTIMATE OUTCOME: Reduced inequality within and among communities
INTERMEDIATE OUTCOME: Township communities' empowerment and youth employability

IMMEDIATE OUTCOMES	OUTPUTS	ACTIVITIES	INPUTS
A range of youth-directed upskilling and youth employment opportunities developed at Gauteng attractions and experiences	Skilled tourism workforce - Created employability opportunities for youth through skills / reskilling and employment opportunities	<p>Influenced the employment and employability of Gauteng youth through the skills development at Gauteng attractions and deployment as guides, maintenance, and hospitality staff initially by</p> <ul style="list-style-type: none"> • Identifying possible participating attractions and assets for attraction-based in-service training • Identifying maintenance, hospitality and guidance issues at current assets and developing appropriate skills programme • Securing stakeholder buy-in on future tourism youth skills development plans. • Supporting new youth training investment opportunities relating to the tourism sector 	<p>Financial Resources Policies</p> <ul style="list-style-type: none"> • Marketing • Endorsements • Transformation • BEE and youth development <p>Social Compacts</p> <ul style="list-style-type: none"> • Youth and township tourism economy <p>Partnerships</p> <ul style="list-style-type: none"> • Gauteng attractions • Youth development community
Tourism Entrepreneurship and SMMEs Development	<p>Empowered township-based entrepreneurs through</p> <ul style="list-style-type: none"> • Skills development, social development, • Job creation • Showcasing the value of township tourism for investment, • Attracting more funding and • Investment into the tourism sector by the public and private sectors and foreign investors 	<ul style="list-style-type: none"> • Partner with the formal trade sector to develop skills and entrepreneurship in the direct and indirect township tourism segments for the growth of the township economy. • Township mobilisation of direct and indirect value chain – empowerment and social development workshops for new entrants • Market entrepreneurs’ offering to the formal tourism value chain for uptake in their offering. • Promote the township offering to increase domestic visitors through programmes like Sho’t Left • Market and showcase the value generated from direct and indirect tourism opportunities 	<ul style="list-style-type: none"> • Training institutions and social development programmes • Trade partnerships for market access

		through PR and CRM activity to the formal trade	
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IMPACT: Increased economic contribution by an inclusive tourism value chain in Gauteng			
ULTIMATE OUTCOME: Reduced inequality within and among communities			
INTERMEDIATE OUTCOME: Visitor experience enhanced.			
IMMEDIATE OUTCOMES	OUTPUTS	ACTIVITIES	INPUTS
Transformed local tourism	<ul style="list-style-type: none"> Transformed tourism products among local communities. New product development offering among local communities. Implemented tourism development projects on: <ul style="list-style-type: none"> Catalytic partnerships Market access Training Helping to eradicate business red tape for better business. Workforce development, mentorship, Business support, Registration of tourism amenities, Quality assurance, 	<p>Developed new tourism services and products through incubation and facilitation of the tourism value chain.</p> <ul style="list-style-type: none"> Tourism incubators Entrepreneurs programme <p>Marketing platform to provide market access.</p> <p>Implement programmes aimed at the empowerment of marginalised enterprises and individuals to promote inclusive growth of the sector, especially in townships by</p> <ul style="list-style-type: none"> Introducing a tourism product development toolkit to guide and assist entrepreneurs. Providing a mentorship platform between established products and emerging businesses 	<p>Financial Resources</p> <p>Policies</p> <ul style="list-style-type: none"> Marketing Endorsements Trade development Economic development National development plan Tourist safety measures <p>Social Compacts</p> <ul style="list-style-type: none"> Economic development partnerships <p>Partnership</p> <ul style="list-style-type: none"> Trade and industry segments <p>Community development partners</p>

	<ul style="list-style-type: none"> • Tourism signage, Service Excellence 	<ul style="list-style-type: none"> • Making provision for business management and funding programmes unique to industry requirements <p>Community Tourism Action Forum, in partnership with SATOVITO</p>	
Tourism share increased	<p>Created reliable transformation baseline information segmented per region and sub-sector to measure growth – quality and bookable.</p> <ul style="list-style-type: none"> • Interpreted the outcome of the baseline for Gauteng compared to the targets set by national targets. • Managed support to destination database of tourism amenities and products • Undertook effective product and service CRM activity. • tourism investment facilitation <p>Enhanced partnerships with the travel trade and relevant sectors for marketing, knowledge, and decision-making</p>	<ul style="list-style-type: none"> • Set community tourism participation and job creation growth targets for Gauteng. • Develop, implement, and manage an efficient and valuable membership, including maintaining the membership database and developing visitor services partnerships. • Registration and accreditation for generating GTA income. • Establish an information knowledge repository which collates all information and research conducted and collected at the principal and regional level 	
	<p>Mentored community-based tourism enterprises and entrepreneurs to enter the tourism value chain.</p> <p>Marketed community incubation products and quality assured through accreditation processes in the first year and then for renewal in the second and third years until sustainable</p>	<p>Support community incubation products to achieve the maturity phase and contribute sustainably to the tourism value chain by</p> <ul style="list-style-type: none"> • Identifying community incubation products with high potential for success • Facilitating benefits for these community incubation products through the Tourism Incentive Programme of NDT 	<p>Financial Resources</p> <p>Policies</p> <ul style="list-style-type: none"> • Marketing • Endorsements • Logistics • Transformation • BEE • Tourist safety measures <p>Social Compacts</p>

		<ul style="list-style-type: none"> • Providing consultation on long-term financial planning • Monitoring quarterly progress and advising on shortcomings • Ensure sustainability of community incubation products after 3-5 years 	<ul style="list-style-type: none"> • Tourism development ecosystem • Close cooperation with GEP on development goals <p>Partnership</p> <ul style="list-style-type: none"> • Development community • Trade partnerships for market access <p>SATOVITO as a critical partner</p>
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8. INSTITUTIONAL PROGRAMME PERFORMANCE INFORMATION

Gauteng Tourism Authority is constituted by the following budget programmes, which inform the packaging of this Annual Performance Plan:

Programme	Programme Purpose
Programme 1: Strategic Support and Business Enablement	Provide strategic support services for effectively implementing the GTA’s mandate and increasing public value and trust through improved governance and accountability.
Programme 2: Destination Communications and Promotions	To stimulate demand for destination Gauteng tourism offerings and increase brand awareness in domestic and international markets.
Programme 3: Bidding and Hosting	To stimulate demand for destination Gauteng through identifying, attracting, securing, and hosting business events to thrive in the tourism and investment sector.
Programme 3: Destination Management and Development	To facilitate effective planning, development, and management of a sustainable and thriving tourism sector.

As reflected in the sections below, the above programmes contribute to attaining the outcomes through programme-level outputs, output indicators, and annual and quarterly targets.

8.1. Programme 1: Strategic Support and Business Enablement

8.1.1. Programme 1: Purpose

The strategic support programme is responsible for providing strategic support for effectively implementing the GTA’s mandate and increasing public value and trust through improved governance and accountability. The strategic support covers the work of the following business divisions.

Business Division	Purpose
Office of the Chief Executive Officer, Risk Management, and Internal Audit	<ul style="list-style-type: none"> To provide strategic support to the CEO to achieve the mandate and outcomes of the Gauteng Tourism Authority
Strategy and Business Intelligence	<ul style="list-style-type: none"> To provide strategic support to the organisation, facilitating Strategic Planning, Monitoring and Evaluation and Business Process management.
Governance and Company Secretariat	<ul style="list-style-type: none"> To provide efficient, effective, and proactive legal governance services to Gauteng Tourism Authority and the Board.
Human Capital	<ul style="list-style-type: none"> To build an inspired and energised organisation and ensure that the organisation has the necessary skills and capacity to operate successfully.
Finance and Supply Chain Management	<ul style="list-style-type: none"> To provide and manage effective end-to-end financial management and supply chain support services to the organisation.
Information Communication and Technology (ICT)	<ul style="list-style-type: none"> To create business value by delivering ICT-related systems and services that increase operational efficiency and effectiveness.
Market Intelligence	<ul style="list-style-type: none"> Provides researched information to support strategic decision-making and actions while coordinating processes that align strategic and operational objectives with business activities

8.1.2. Programme 1: Outcomes, Outputs, Performance Indicators and Targets

GGT2030 statement	Outcome	Output	Output Indicators	Historically Audited/Actual Performance			Estimated Performance	Annual Target for the MTEF period		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
GGT2030 impact statement on building a capable and developmental state with heightened procurement reform.	Inclusive and sustainable tourism growth	Suppliers owned by PDIs who served GTA in delivering its business model	Percentage of GTA procurement spent on enterprises owned by women	New indicator as from 2023/24	New indicator as from 2023/24	New indicator as from 2023/24	30%	30%	30%	30%
			Percentage of procurement spend on enterprises owned by youth	New indicator as from 2023/24	New indicator as from 2023/24	New indicator as from 2023/24	10%	10%	10%	10%
			Percentage of procurement spend on enterprises owned by persons with disabilities	New indicator as from 2023/24	New indicator as from 2023/24	New indicator as from 2023/24	5%	5%	5%	5%
			Percentage of valid procurement Invoices paid within 15 days	New indicator as from 2023/24	New indicator as from 2023/24	New indicator as from 2023/24	100%	100%	100%	100%
			Number of PDIs suppliers participated in the GTA Supplier Development Programme	New indicators as from 2021/22	50	53	Not part of the 2023/24 APP	60	60	60

8.1.3. Programme 1: Indicators, Annual and Quarterly Target

Output Indicators	Annual Targets	Q1	Q2	Q3	Q4
1. Percentage of GTA procurement spent on enterprises owned by women	30%	-	-	-	30%
2. Percentage of procurement spend on enterprises owned by youth	10%	-	-	-	10%
3. Percentage of procurement spend on enterprises owned by persons with disabilities	5%	-	-	-	5%
4. Percentage of valid procurement Invoices paid within 15 days	100%	-	-	-	100%
5. Number of PDIs suppliers participated in the GTA Supplier Development Programme	60	-	20	20	20

8.1.4. Programme 1: Resource Considerations

Programme 1: Strategic Support (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
Economic classification:							
Compensation of employees	46,572	46,301	48,985	49,913	58,500	58,500	58,500
Goods and services	18,595	84,948	24,787	16,790	21036	21,900	22,950
Capital expenditure	-	-	-	-	1,000	1,000	900
Total expenses	65,168	131,248	73,772	66,703	80 536	81,400	82,350

8.1.5. Programme 1: Explanation of Planned Performance over the Medium-term Period

The Strategic Support Programme offers support services to the Gauteng Tourism Authority's core business to deliver its mandate. This programme deals with Gauteng Tourism's resources, both human and financial, and strives to deliver efficiency within the organisation. The focus for 2024/25 and beyond is to ensure that the Gauteng Tourism Authority deploys its people, processes, and financial resources to improve its effectiveness, cost, and operational efficiency across the organisation. It requires a focus on attracting and retaining the best talent to deliver on the organisation's outcomes and on establishing cross-functional teams made up of people with responsibilities along the lines of what they do best. The programme will facilitate research, development, and business process management over and above strategic planning and monitoring.

8.2. Programme 2: Destination Communications and Promotions

8.2.1. Programme 2: Purpose

The Destination Marketing Programme stimulates demand for destination Gauteng tourism offerings and increases brand equity in domestic and international markets. The programme focuses on the following areas to include:

- **Domestic Market Stimulation** – The domestic tourism market is a solid base and ignition point for the province's economic recovery post-COVID-19 and the implementation mechanism for the Growing Gauteng Together Vision 2030. Through this programme, the agency will partner with Gauteng regions and visitor economy products to develop packages that will drive the uptake of domestic trips and make Gauteng an affordable and value-for-money destination for locals. Similarly, the agency will coordinate partnership efforts with other departments to leverage the public service and related agency staff through discounted weekend deals and shot breaks to build demand for the provincial and municipal low-budget break facilities in government-owned nature reserves and heritage sites.
- **Brand Gauteng Repairing** – Through this programme, the GTA will drive coordinated efforts to separate the destination brand from the corporate brand to build collaborative residual value and mitigate associated risks. In implementing the brand Gauteng's strategic framework, the agency will focus on experiential marketing, storytelling, hyper-targeting, live engagement and experiences, gamification as a key content and engagement platform, and strengthening the social listening systems. In positioning Gauteng as a preferred destination for tourism, investments, trade, competitive sports, and the creative economy, the GTA will create pathways for brand growth and reputation by building toolkits that guide a single destination brand outlook. Key

deliverables will include the development of the brand health index and the tracking socialisation of early warning systems to mitigate brand killers like crime, grime, airlift capacity, and incidents of xenophobia, amongst others. Repairing the destination brand work will be coordinated through heightened stakeholder mobilisation, citizen involvement as champion hosts and increased appetite from complementary brands in building a Gauteng brand tribe along the destination brand conversion curve. Firming the destination brand value proposition and leveraging the strengths and health of the tribe's complementary brands will characterise the impact-driven approach to brand building.

- **International Arrivals** – Guided by the destination market investment framework, the province will seek to contribute positively to the national targets for international arrivals. A specific focus for Gauteng will be the drive to increase the length of stay, bed nights, spending, and geographic spread in line with our aim to use the visitor economy to engender transformation and inclusive growth. Our defining feature will be the hosting and bidding for quality signature events in line with the GGT2030 high growth sectors and targeted focus on African land and air markets.
- **Air Access** – The air access initiative aims to support Gauteng's GGT2030 strategy by facilitating economic growth through greater alignment with the tourism and trade markets and unblocking obstacles to growth. The initiative allows for greater market access to support growth and competition through focused demand stimulation and supports the following strategic goals:
 - Promotion of trade and tourism.
 - Increasing contribution to accelerated economic growth.
 - Increase the mobility of the domestic and regional markets.
 - Promotion of sustainable aviation industry.
 - and environmental responsibility.
- **Co-Creation and Stakeholder focus outlook** – Leveraging on the growth of the digital and share-economy frontier, the GTA, through this programme, is adopting an always-on digital ecosystem and business strategy with co-creation and joint implementation capabilities. The customer-centric and stakeholder-driven approach will drive all our interventions and outlook with an appreciation that content is king, marketing and distribution are queen and set the agenda. Multi-year marketing investment cycles with high-pressure bidding capabilities like mega signature events actioned in a scalable manner will ensure a sustained pipeline with accrued revenue and impact that broadly highlights the value of tourism and the visitor economy.

8.2.2. Programme 2: Outcomes, Outputs, Performance Indicators and Targets

GGT2030 statement	Outcome	Output	Output Indicators	Historically Audited/Actual Performance			Estimated Performance	Annual Target for the MTEF period		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
Promoting investment in new growth path sectors, i.e., creative industries, supporting Africa’s agenda for industrialisation and regional integration and cementing the GCR as the gateway to Africa.	Inclusive and sustainable tourism growth	Development and promotion of Gauteng Brand	The score level of the Gauteng Brand Index achieved	New indicator as from 2022/23	New indicator as from 2022/23	Baseline set	45%	60%	70%	80%
		International Markets Tourism promotion	Number of international arrivals that visited Gauteng	922k	932k	1.6	1.605m	1.622m	1.638m	2m
			Total Foreign Direct Spending generated from international markets	R28 bn	R10bn	R11bn	R13bn	R20bn	R25bn	R35bn
		Domestic Market Tourism Promotion	Number of domestic trips taken in Gauteng	3.3m	3.2m	3 500 164	4.0m	5.9m	6m	7m
			Total Direct Domestic Spending generated in Gauteng	R9.3bn	R17.2bn	R10 bn	R10.8 bn	R11 bn	R13 bn	R17 bn
		Increase Airlift capacity	Number of new airline routes Promoted	New indicator	New indicator	3	3	3	3	3

GGT2030 statement	Outcome	Output	Output Indicators	Historically Audited/Actual Performance			Estimated Performance	Annual Target for the MTEF period		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
				as from 2021/22	as from 2021/22					

8.2.3. *Programme 2: Indicators, Annual and Quarterly Targets*

Output Indicators	Annual Targets	Q1	Q2	Q3	Q4
1. The score level of the Gauteng Brand Index achieved	60%	-	-	-	60%
2. Number of international arrivals that visited Gauteng	1.622m	-	-	-	1.622m
3. Total Foreign Direct Spending generated from international markets	R20bn	-	-	-	R20bn
4. Number of domestic trips taken in Gauteng	5.9m	-	-	-	5.9m
5. Total Direct Domestic Spending generated in Gauteng	R11 bn	-	-	-	R11 bn
6. Number of new airline routes Promoted	3	-	-	-	3

8.2.4. Programme 2: Resource Considerations

Programme 2: Destination Communications and Promotions (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
Economic classification:							
Compensation of employees	-	-	-	-	-	-	-
Goods and services	8,334	17,793	26,277	6,401	10,100	3,641	4,259
Capital expenditure	-	-	-	-	-	-	-
Total expenses	8,334	17,793	26,277	6,401	10,100	3,641	4,259

8.2.5. Programme 2: Explanation of Planned Performance over the Medium-term Period

The Destination Marketing Programme positions and profiles Gauteng as a business events destination through bidding and hosting of events by identifying, attracting, and securing bids and hosting small, medium, and large meetings, conferences, exhibitions, incentives, and event gatherings with researched potential of significant return on investment, maximum impact and to raise the level of awareness of Gauteng's wide range of business tourism-related venues and associated services.

8.3. Programme 3: Bidding and Hosting

8.3.1. Programme 3: Purpose

To stimulate demand for destination Gauteng through identifying, attracting, securing, and hosting business events to thrive in the tourism and investment sector. The Gauteng Convention Bureau (GCEB) Programme is responsible for identifying, attracting, securing, and hosting high-yield business events with researched potential of significant return on investment and maximum impact and for raising the level of awareness of Gauteng's wide range of business tourism-related venues and associated services.

Bidding and Hosting Programme comprises of 3 sub-programmes with distinct areas of operations namely, business lead development, delegate and events promotions, events, and MICE support. Bidding and Hosting enables economic growth and creates jobs in tourism, conferencing, and hospitality (inclusive of social cohesion in township communities) for a value-added contribution to the GDP and employment within the sector. It is mandated to position and profile Gauteng as a business events destination through bidding and hosting events. It is a one-stop solution for independent information and assistance, giving neutral advice on bidding, hosting, and organizing events in Gauteng. Furthermore, it sharpens and focuses the government's ongoing involvement in attracting and hosting events, providing direction for a more coordinated and comprehensive approach.

The overarching aim of the Bidding and Hosting programme is to create a systematic, balanced and sustainable portfolio of world class business and lifestyle events that deliver a long term economic, social and cultural legacy for the people of Gauteng, as well as ensuring best value for public resources.

8.3.2. *Programme 3: Outcomes, Outputs, Performance Indicators and Targets*

GGT2030 statement	Outcome	Output	Output Indicators	Historically Audited/Actual Performance			Estimated Performance	Annual Target for the MTEF period		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
Promoting investment in new growth path sectors i.e., creative industries, supporting Africa’s agenda for industrialisation and regional integration and cementing the GCR as the gateway to Africa.	Inclusive and sustainable tourism growth	MICE and Events promotion	Number of bids submitted	22	26	Target not set during the year under review	15	30	30	30
			Number of Events hosted in Townships	New indicator as from 2023/24	New indicator as from 2023/24	New indicator as from 2023/24	8	8	8	8
			Rand value generated through supported events	Target not set during the year under review	Target not set during the year under review	R1bn	R1bn	R600m	R1,3bn	R1,5bn
			Rand value generated for SMME suppliers through events	New indicator as from 2022/23	New indicator as from 2022/23	R37m	Not part of the 2023/24 APP	R15m	R32m	R35m

8.3.3. *Programme 3: Indicators, Annual and Quarterly Targets*

Output Indicators	Annual Targets	Q1	Q2	Q3	Q4
1. Number of bids submitted (International Business Events)	30	-	-	-	30
2. Number of Events hosted in Townships	8	1	2	3	2
3. Rand value generated through supported events	R600m	1	2	4	R600m
4. Rand value generated for SMME suppliers through events	R15m	-	-	-	R15m

8.3.4. *Programme 3: Resource Considerations*

Programme 3: Bidding and Hosting (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
Economic classification:							
Compensation of employees	-	-	-	-	-	-	-
Goods and services	-	-	18,561	16,292	11,616	7,925	9,270
Capital expenditure	-	-	-	-	-	-	-
Total expenses	-	-	18,561	16,292	11,616	7,925	9,270

8.3.5. Programme 3: Explanation of Planned Performance over the Medium-term Period

The focus for 2024/25 and beyond is to ensure that GCEB enables economic growth and creates jobs in tourism, conferencing, and hospitality (inclusive of social cohesion in township communities) for a value-added contribution to the GDP and employment within the sector. Furthermore, the business unit sharpens and focuses the government’s ongoing involvement in attracting and hosting events, providing direction for a more coordinated and comprehensive approach.

8.4. Programme 4: Destination Management and Development

8.4.1. Programme 4: Purpose

The Destination Management and Development Programme facilitates effective planning, development, and management of Gauteng's sustainable, thriving tourism sector. The Destination Management and Development covers the work of the following business divisions:

Business Division	Purpose
Destination Planning and Development	<p>To Facilitate and coordinate tourism destination development.</p> <p><i>Tourism enhancement</i></p> <ul style="list-style-type: none"> Increases the competitiveness of Gauteng’s tourism industry. <p>Destination Planning and Investment Coordination</p> <ul style="list-style-type: none"> Ensures that tourism infrastructure supports the current and future growth of the sector. <p><i>Working for Tourism</i></p> <ul style="list-style-type: none"> Facilitates the development of tourism infrastructure projects under the EPWP through labour-intensive methods targeted at youth, women, unemployed and disabled people, and small, medium, and micro enterprises.
Tourism Sector Support	<p><i>Skills Development</i></p> <ul style="list-style-type: none"> Coordinate and facilitate people development for service excellence, primarily focusing on SMMEs and Entrepreneurs through

Business Division	Purpose
	<p>facilitating:</p> <ul style="list-style-type: none"> • Tourism skills development interventions for tourism businesses and tourism workforce – for new entrants and already existing businesses, • Tourism skills interventions target unemployed communities and beneficiaries, focusing on previously disadvantaged groups and individuals. <p>Regulation and Compliance of Tourism Industry</p> <ul style="list-style-type: none"> • To facilitate tourism business regulations for amenities and services, • Encourage tourism business sector compliance and quality assurance, including grading of amenities, • Facilitate tourism safety awareness and complaints management. <p>Visitor Information</p> <ul style="list-style-type: none"> • Encourage coordination of visitor-centric quality, assured tourism information servicing tourism businesses and travellers/visitors throughout Gauteng province. <p>SMME Development and Tour Guiding Registrar Services</p>

8.4.2. Programme 4: Outcomes, Outputs, Performance Indicators and Targets

GGT2030 statement	Outcome	Output	Output Indicators	Historically Audited/Actual Performance			Estimated Performance	Annual Target for the MTEF period		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
Building an inclusive economy through targeted	Inclusive and sustainable tourism growth	Leverage Job opportunities through the Tourism programme	The number of job opportunities created through	New indicator as from 2021/22	423	3300	3500	3700	4000	4500

GGT2030 statement	Outcome	Output	Output Indicators	Historically Audited/Actual Performance			Estimated Performance	Annual Target for the MTEF period		
				2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
investment in tourism infrastructure			Tourism projects.							
		Sector Skills Support	Number of capacity building programmes implemented	New indicator as from 2022/23	New indicator as from 2022/23	New indicator as from 2023/24	5	4	4	4
		SMME Development	Number of incubator programme implemented	New indicator as from 2023/24	New indicator as from 2023/24	New indicator as from 2023/24	2	2	2	2
			Number of SMMEs provided with access to markets	30	45	60	150	200	300	350
			Number of tourism hubs provided with tourism safety programmes	New indicator as from 2023/24	New indicator as from 2023/24	New indicator as from 2023/24	4	4	4	4

8.4.3. *Programme 4: Destination Management and Development*

Output Indicators	Annual Targets	Q1	Q2	Q3	Q4
1. The number of job opportunities created through Tourism projects.	3700	-	-	-	3700
2. Number of capacity building programmes implemented	4	-	1	2	1
3. Number of incubator programme implemented	2	-	-	1	1
4. Number of SMMEs provided with access to markets	200	50	50	50	50
5. Number of tourism hubs provided with tourism safety programmes	4	-	1	2	1

8.4.4. *Programme 4: Explanation of Planned Performance over the Medium-term Period*

- Destination Planning and Development** – The COVID-19 pandemic has and continues to devastate the broader tourism sector, resulting in the closure of tourism businesses, businesses operating at drastically reduced capacity, massive job losses, the collapse of tourism supply in Gauteng and thus causing a regression of transformation targets for the tourism sector in Gauteng. Guided by the Tourism Sector Recovery Plan as aligned to the Growing Gauteng Together (GGT) approach, the Destination Planning and Development, during the MTEF period, will direct its priorities towards targeted and coordinated action to mitigate the impacts of the Crisis and set the sector on the most optimal path to recovery, transformation, and long-term sustainability.
- The 2023/24 MTEF focus will be on strengthening the tourism supply side through resource mobilization and agglomerated interventions. In this regard, aggregated financial support will be directed towards supporting tourism businesses (prioritising SMMEs) as a measure to strengthen transformation, ensuring the sustainability and resilience of the sector. Furthermore, efforts will be directed towards stimulating new demand for tourism in Southern Corridors as part of implementing the Vaal Spatial Economic Zone (SEZ) through the development and positioning of Vaal Marina as a hub for holiday

and business tourism targeted at domestic and regional visitors, whilst continuously setting aside resources for maintaining and upgrading the state-owned tourism infrastructure and strategic community-based assets in Gauteng. These interventions are essential for job creation, product diversification and geographic spread of tourism value.

Secondly, Destination Planning and Development will introduce innovative solutions by GTA to deliver tourism services to its customers and consumers. In this regard, existing visitor centres will be repurposed to support the virtual distribution of tourism information and other supporting services to GTA key stakeholders and visitors whilst opening new trading channels for tourism SMME suppliers and creative artists. Thirdly, the Working for Tourism as an employment drive for tourism aligned to Tshepo 1 million will be upscaled to incorporate industry aggregated efforts, including private and public sector stakeholders.

- **Tourism Sector Support** – the Tourism Sector Support Services ensures that the sector in Gauteng is transformed. The outputs and outcomes identified will assist in empowering women, youth, and people with disabilities to participate in the tourism sector. During the 2023/4 financial year, the unit will implement capacity-building initiatives to ensure continuous human resource improvement.
- **Enterprise Development and Transformation** – transformation is one of the critical pillars of the Tourism Agenda and the main driver for inclusive economic growth and job creation. The performance is to deliver needs-based enterprise development support programmes that will strengthen the sustainability of Township enterprises, including community-owned tourism establishments.
- **Visitor Support Services** – visitor services are integral to tourism operations and destination marketing. If the promises made through destination marketing cannot be delivered upon and exceeded through excellent visitor services, the investment in destination marketing will be almost worthless. Visitor services will be an integral part of Gauteng's future tourism operations. It is a cross-cutting operation, supporting the three pillars of destination marketing: conference & incentives, events, and leisure tourism. Indeed, visitor services should be seen as an integral part of the whole marketing strategy by ensuring customer satisfaction, which invariably is the best form of promotion, through ‘word-of-mouth’ and repeat visits and by developing the

customer database for future ‘customer relationship marketing’. Also, visitor services are vital for membership development and the delivery of benefits to tourism businesses and will be an important contributor to future development activity.

- **Tour guiding and registrar services** – the well-being of tourist guides also contributes to enhanced visitor experiences to our visitors and tourists. Programmes related to training and capacity building in this critical sector are vital to growing and developing the sector, and tourist guides ensure excellent and memorable experiences.
- **Intergovernmental Relations** – for the successful execution of plans and policies concerning tourism, lobbying and advocacy for tourism enhancement and visitor experience is essential throughout the three spheres of Government. Local Government may then be regarded as a critical role player in the above services and a key manager of spatial management of tourism facilities and access to visitor experiences in a particular locality. The District Development Model as a spatial integration tool will enhance tourism's competitiveness in Gauteng localities and destinations across the five.

8.4.5. Programme 4: Resource Considerations

Programme 4: Destination Management and Development (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
Economic classification:							
Compensation of employees	-	-	-	-	-	-	-
Goods and services	6,866	13,291	16,484	25,235	10,268	11,237	13,018
Capital expenditure	-	-	-	-	-	-	-
Total expenses	6,866	13,291	16,484	25,235	10,268	11,237	13,018

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

9.1. Projected Revenue for 2024/25 MTEF

Revenue	2020/21	2021/22	2022/23	2023/24			2024/25	2025/26	2026/27
(R'000)	Audited	Audited	Audited	Approved	Special Adjustments	Revised Budget	Estimate	Estimate	Estimate
DED Grant	97,850	124,009	109,989	109,954	3,500	113,454	112,520	104,203	108,897

9.2. Projected Expenditure for 2024/25 MTEF

Consolidated expenditure (R'000)	Audited Outcomes			Estimated Expenditure	MTEF Expenditure Estimates		
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
Programme 1: Strategic Support	65,168	131,248	73,772	66,703	80,536	81,400	82,350
Programme 2: Destination Communications and Promotions	8,334	17,793	26,277	6,401	10,100	3,641	4,259
Programme 3: Bidding and Hosting	-	-	18,561	16,292	11,616	7,925	9,270
Programme 4: Destination Management and Development	6,866	13,291	16,484	25,235	10,268	11,237	13,018
Total expenses	80,368	162,331	135,095	114,631	112,520	104,203	108,897

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

Intermediate	Key risk	Risk mitigation
Departmental Cost Containment Measures	INTERNAL COST CONTAINMENT directives might impact the spending and ability to deliver on the mandate of tourism development and marketing	Mobilize trade and other partnerships and joint activity to gain access to marketing and development investment beyond own limited fund
Value generated through tourism uptake	Lack of or weak marketing strategy for business and leisure tourism promoting Gauteng as the must-visit destination for leisure and business tourism	Integrated marketing strategy with a robust channel approach, including embracing the 4IR & AI digital marketing channels
	Weak partnership uptake due to the poor reputation of GTA amongst the tourism trade stakeholders	Strong reputation and thought leadership drive as part of the integrated marketing and PR implementation
	Competitive offering by KZN and Western Cape as the preferred	Aggressive and compelling marketing and showcasing of the conference, events and business tourism offering of Gauteng
	Competitive offering by alternative venues as the preferred event destination	Intense market research, proactive attracting, and hosting of events – mega, major, significant, and local
Inclusive and sustainable tourism growth	Failure to measure and illustrate the value of tourism to the benefit of local communities, especially township tourism and low uptake of developed products	Showcase the success of tourism development and the benefits created through direct and indirect business generation and job creation
Tourism offering differentiation	Low uptake of the product offering	DMO marketing and growth stakeholder engagement
Transformed local tourism	Value chain not responding to the township SMME offering due to perceived or actual quality-assurance issues	Position the quality assurance and accreditation of the new SMME entrants into the tourism value chain – detailed tourism development implementation
	Limited resources of mentor and accredit community incubation tourism products to maturity	Partner with identified trade to mentor, train and accredit emerging tourism products and entrepreneurs into maturity and accreditation
Tourism shares increased	There is not enough differentiated product development to position and leverage the unique selling points of Gauteng as a destination	Detailed tourism development and showcasing of the differentiated offering – maintaining a struct and up-to-date database of products to leverage
Tourism Entrepreneurship and SMMEs Development	Tourism is not seen as a critical role player in the broader economic development value chain	Solid partnerships and stakeholder engagement with trade partners as well as a variety of public sector partners responsible for economic development in Gauteng

PART D: TECHNICAL INDICATOR DESCRIPTION

11. TECHNICAL INDICATOR DESCRIPTORS

11.1. Programme: Strategic support

Indicator Title	Output Indicator 1: Percentage of GTA procurement spent on enterprises owned by women.
Definition	Measures 30% of actual expenditure spent on supporting enterprises owned by women
Source of data	<ul style="list-style-type: none"> • Central Supplier Database Report that verifies whether women own enterprises. • Paid invoices of women-owned enterprises
Method of Calculation / Assessment	<ul style="list-style-type: none"> • Percentage of actual expenditure spent on women-owned enterprises. • Actual expenditure with women-owned enterprises divided by total goods and services actual expenditure
Means of verification	Verification using CSD report on whether the women-owned
Assumptions	Business units spend their respective budgets
Disaggregation of Beneficiaries (where applicable)	N/A
Spatial Transformation (where applicable)	N/A
Calculation Type	Cumulative
Reporting Cycle	Annual
Desired performance	Higher than targeted performance is desirable.
Responsibility	Chief Financial Officer

Indicator Title	Output Indicator 2: Percentage of procurement spend on enterprises owned by youth
Definition	Measures 10% of actual expenditure spent on supporting enterprises owned by youth
Source of data	<ul style="list-style-type: none"> • Central Supplier Database Report that verifies whether the enterprise is owned by youth. • Paid invoices of youth-owned enterprises
Method of Calculation / Assessment	<p>Percentage of actual expenditure spent on youth-owned enterprises.</p> <p>Actual expenditure spent on youth divided by Total goods and services actual expenditure</p>
Means of verification	Verification using CSD report on whether the enterprise is youth-owned
Assumptions	Business units spend their respective budgets
Disaggregation of Beneficiaries (where applicable)	N/A
Spatial Transformation (where applicable)	N/A
Calculation Type	Cumulative

Indicator Title	Output Indicator 2: Percentage of procurement spend on enterprises owned by youth
Reporting Cycle	Annual
Desired performance	Higher than targeted performance is desirable.
Responsibility	Chief Financial Officer

Indicator Title	Output Indicator 3: Percentage of procurement spend on enterprises owned by persons with disabilities
Definition	Measures 5% actual expenditure spent on supporting enterprises owned by persons with disabilities
Source of data	<ul style="list-style-type: none"> Central Supplier Database Report that verifies whether persons with disabilities own the enterprise. Paid invoices of enterprises owned by persons with disabilities
Method of Calculation / Assessment	<ul style="list-style-type: none"> Percentage of actual expenditure spent on enterprises owned by persons with disabilities. Actual expenditure spent on enterprises owned by persons with disabilities divided by Total goods and services actual expenditure
Means of verification	Verification using CSD report on whether persons with disabilities own the enterprise
Assumptions	Business units spend their respective budgets
Disaggregation of Beneficiaries (where applicable)	N/A
Spatial Transformation (where applicable)	N/A
Calculation Type	Cumulative
Reporting Cycle	Annual
Desired performance	Higher than targeted performance is desirable.
Responsibility	Chief Financial Officer

Indicator title	Output Indicator 4: Percentage of valid procurement Invoices paid within 15 days
Definition	Measures the percentage of invoices paid within 15 days to suppliers of goods and services.
Source of data	GTA Finance System
Method of calculation/ assessment	<ul style="list-style-type: none"> Invoices: Number of days taken to process payment for valid invoices received. Mandatory Payment: Payments are made to relevant bodies in line with prescriptions.
Means of verification	Reports from OCFO with evidence.
Assumptions	Reliability of reports from the unit.
Disaggregation of beneficiaries (where applicable)	Not Applicable
Spatial transformation (where applicable)	Not Applicable
Calculation type	Cumulative
Reporting cycle	Quarterly
Desired performance	Performance higher than target is acceptable
Indicator responsibility	Chief Financial Officer

Indicator title	Output Indicator 5: Number of designated groups suppliers benefitted from the GTA Supplier Development Programme to reinforce procurement reform
Definition	Number of GTA Supplier benefitting from the agency's Supplier Development Programme implemented in association with GEP and other agencies. These includes suppliers from the designated groups covering youth, women, persons living with disabilities and military veterans. Overall the indicator refers to suppliers owned by PDIs who served GTA in delivering its businesses
Source of data	Relevant Procurement Reports, attendance register from the supplier development consultation sessions, login details from the online training interventions. Confirmation letters from the GTA validating the supplier's participation in the programme.
Method of calculation/assessment	Simple count
Means of verification	Supply chain database, Supplier Development Programme quarterly reports, attendance register of suppliers participating in the programme
Assumptions	Not applicable
Disaggregation of beneficiaries (where applicable)	Not applicable
Spatial transformation (where applicable)	All regions
Calculation type	Non-cumulative
Reporting cycle	Annually
Desired performance	Higher than the set target.
Indicator responsibility	Chief Financial Officer

11.2. Programme: Destination Communications and Promotions

Indicator Title	Output Indicator 1: Scored level of Gauteng Brand Index
Definition	This refers to an umbrella process for metrics that show how well your brand is doing. These metrics include the net promoter score, the share of voice, brand reputation, visitors' perception and satisfaction, purchase intent of the destination-differentiated products and perceived quality, brand awareness and association.
Source of data	GTA standardised Brand index report
Method of Calculation / Assessment	Aggregated results
Means of verification	Audited GTA standardised Brand index report and relevant sources from brand index activities, i.e., survey.
Assumptions	<ul style="list-style-type: none"> Working digital ecosystem and information and comms technology. Enough budget to invest in building digital and social media assets. Enough funding to implement the integrated brand and communications strategy. No or less effect of brand killers
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative
Reporting Cycle	Annually

Desired performance	Higher than the set target
Responsibility	Head: Destination Marketing and Communication

Indicator Title	Output Indicator 2: Number of international arrivals that visited Gauteng
Definition	This relates to the percentage increase in the number of international arrivals into Gauteng covering global source markets
Source of data	Quarterly tourism reports from SAT/ Stas SA
Method of Calculation / Assessment	UNWTO/STATS SA and SA Tourism method of calculation as led and finalised by SA Tourism
Means of verification	Quarterly tourism reports from SAT/ Stas SA.
Assumptions	The travel restrictions from these markets will be lifted. Enough marketing budget to invest in long-term yield, no major competitor markets, aggressive price competition, and airlift build capacity. All the governance, oversight and auditing bodies understand the calendar year data collection instead of the financial year.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired performance	Increased arrivals from overseas source markets
Responsibility	Head: Destination Marketing and Communication

Indicator Title	Output Indicator 3: Total Foreign Direct spending generated from international markets
Definition	This relates to the total tourism foreign direct revenue generated through spending and bed nights annually from these source markets in Gauteng
Source of data	Quarterly tourism reports from SAT/ Stas SA
Method of Calculation / Assessment	UNWTO/STATS SA and SA Tourism method of calculation as led and finalised by SA Tourism
Means of verification	Quarterly tourism reports from SAT/ Stas SA.
Assumptions	The economic situation in terms of affordability will improve, travel restrictions from these markets will be lifted, and there will be a large enough vaccinated population, low numbers of COVID-19 infections, and available airlift capabilities. All the governance, oversight and auditing bodies understand the calendar year data collection instead of the financial year.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.

Indicator Title	Output Indicator 3: Total Foreign Direct spending generated from international markets
Desired performance	Increased revenue from overseas key source markets
Responsibility	Head: Destination Marketing and Communication

Indicator Title	Output Indicator 4: Number of domestic trips taken in Gauteng
Definition	This relates to the actual increase in the number of domestic trips undertaken in Gauteng
Source of data	Quarterly tourism reports from SAT/ Stas SA
Method of Calculation / Assessment	STATS SA and or SA Tourism method of calculation as led and finalised by SA Tourism
Means of verification	Quarterly tourism reports from SAT/ Stas SA
Assumptions	The travel restrictions from these markets will be lifted, with enough vaccinated population and low numbers of COVID-19 infections. Enough competitive price points for domestic travel and enough investments into domestic tourism promotion efforts and deals. All the governance, oversight and auditing frameworks understand the calendar year data collection instead of the financial year.
Disaggregation of Beneficiaries (where applicable)	N/A
Spatial Transformation (where applicable)	All regions
Calculation Type	Non-cumulative
Reporting Cycle	Annually
Desired performance	Higher than the set target
Responsibility	Head: Destination Marketing and Communication

Indicator Title	Output Indicator 5: Total Direct Domestic spending generated in Gauteng
Definition	This relates to the total domestic tourism trip revenue generated through spend, overnight stays, weekend power breaks and holiday trips
Source of data	Quarterly tourism reports from SAT/ Stas SA
Method of Calculation / Assessment	STATS SA and or SA Tourism method of calculation as led and finalised by SA Tourism
Means of verification	Quarterly tourism reports from SAT/ Stas SA
Assumptions	The economic situation in terms of affordability will improve, the national state of disaster, which restricts operating hours, will be lifted, enough vaccinated population and low numbers of COVID infections and available and affordable airlift and road carriers' infrastructure during peak seasons and holidays. All the governance, oversight and auditing bodies understand the calendar year data collection instead of the financial year.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Not applicable.
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired performance	Increased destination Gauteng revenue from domestic trips
Responsibility	Head: Destination Marketing and Communication

Indicator Title	Output indicator 6: Number of new airline routes promoted
Definition	This relates to the number of new or returning airline routes into Gauteng promoted. The purpose is to increase airlift capacity (International and Domestic) of the province to support of the implementation of the tourism, trade, and investment strategy of the province.
Source of data	Project implementation report measured in line with the project plan.
Method of Calculation / Assessment	Quantitatively – simple count
Means of verification	Airline reports from aggregating bodies like ACSA regarding new or returning routes and any relevant source of information per the project plan and project report.
Assumptions	Airline recovery as countries open borders to allow air travel
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	City of Ekurhuleni, City of Johannesburg, Western Corridor, City of Tshwane
Calculation Type	Non-cumulative
Reporting Cycle	Annually
Desired Performance	Maintain or increase FY2023/2024 statistics
Responsibility	Executive: Office of the CEO

11.3. Programme: Destination Communications and Promotions

Indicator Title	Output Indicator 1: Number of bids submitted
Definition	The number of bid submissions will be tracked for measurement of bid submissions for international and regional business events (meetings, incentives, conventions, and exhibitions) that the Gauteng Convention and Events Bureau will support. Each bid submission must meet the minimum requirements of the Revised Bid Support Programme.
Source of data	List and copies of the bids supported quarterly.
Method of Calculation / Assessment	A simple count of the number of bids submitted.
Means of verification	Bid support letters, signed by the Head: GCEB
Assumptions	<p>Each bid submission starts with a lead sourcing process to identify and qualify a potential piece of business. The lead sourcing process can take up to 2 to 3 years to convert a lead into a bid submission.</p> <p>Each bid submission requires a coordinated effort, including various value chain stakeholders (association, venue, professional conference organiser (PCO), etc.), to develop a bid strategy and bid document that responds to the hosting requirements of the event owner/s.</p>
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	All Gauteng Regions
Calculation Type	Cumulative (year-end).
Reporting Cycle	Quarterly.
Desired performance	Higher than targeted performance is desirable.
Responsibility	Head: Gauteng Convention and Events Bureau

Indicator Title	Output indicator 2: Number of Events hosted in Townships
Definition	These events have a substantial local influence from within the township in terms of attendance and focus and have the potential to generate local tourism and interest from people outside the township where such events take place. Use this event to boost the township economy, create job opportunities, and boost local township tourism.
Source of data	Events supported- Approval report
Method of calculation	Count the number of township events supported
Means of verification	Service level agreement and Closeout Reports from suppliers.
Assumption	There will be township events that can be incubated into significant events
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	Gauteng Townships
Calculation type	Non-Cumulative
Reporting cycle	Quarterly
New indicator	Yes,
Desired performance	Implementation as per defined target.
Responsibility	Head: Gauteng Convention and Events Bureau

Indicator Title	Output Indicator 3: Rand value generated through supported events.
Definition	This indicator determines the economic value in rand generated from participants/ delegates/ exhibitors attending of B2B and B2C Events supported by the GCEB.
Source of data	Signed MoU, project implementation report and Event implementation confirmation letter.
Method of Calculation / Assessment	No of delegates x by number of days x rand value. GTA uses the SAT rand value calculation model.
Means of verification	Event implementation confirmation, Close out Reports from organizers and/or Planners including relevant sources.
Assumptions	Not applicable.
Disaggregation of Beneficiaries (where applicable)	Not applicable.
Spatial Transformation (where applicable)	All Gauteng Regions
Calculation Type	Non-cumulative
Reporting Cycle	Annually
Desired performance	Higher than targeted performance is desirable.
Responsibility	Head: Gauteng Convention and Events Bureau

Indicator Title	Output indicator 4: Rand value generated for SMME suppliers through events.
Definition	Rand value facilitated for SMME through supported hosted events.
Source of data	Event implementation confirmation letters and or/ closeout reports of B2B and B2C events,
Method of calculation	Simple count

Means of verification	SMME Invoices and / Or letters from SMME businesses confirming project transactions including relevant sources, i.e., Number of SMMEs supported with the following evidence/ proof (a) Participation in the event, (b) nature of the participation, (c) type of benefit (d) rand value benefitted by SMME, (e) gender (f) race, (g) and region.
Assumption	Not applicable.
Disaggregation of Beneficiaries (where applicable)	Women businesses (35% of the set target) Youth businesses (35% of the set target) Township businesses (70% if the set target)
Spatial Transformation (where applicable)	All regions
Calculation type	Non-Cumulative
Reporting cycle	Annually
New indicator	Yes,
Desired performance	Higher than the set target.
Responsibility	Head: Gauteng Convention and Events Bureau

11.4. Programme: Destination Management and Development

Indicator Title	Output indicator 1: Number of Job opportunities created through Tourism projects.
Definition	This indicator refers to aggregated jobs created or leveraged from the sector's performance, including its operations.
Source of data	Verified Project reports and implementation reports.
Method of calculation / assessment	Simple count
Means of verification	Proof of employment (Signed employment forms/contract).
Assumptions	Availability and access to relevant data timeously and cooperation of key stakeholders.
Disaggregation of beneficiaries (where applicable)	The project is primarily targeted at unemployed youth and, secondarily, the previously disadvantaged groups (women, PWD) from all corridors of Gauteng.
Spatial transformation (where applicable)	The project will be implemented in all corridors of Gauteng
Calculation Type	Non-cumulative
Reporting cycle	Annually
Desired performance	Higher than the set target
Indicator responsibility	Head: Destination Planning and Development

Indicator Title	Output Indicator 2: Number of capacity building programmes implemented
Definition	This relates to tourism-focused interventions meant to assist with training in skills, and or enhance the sustainability of tourism businesses and services
Source of data	Approved project implementation report
Method of Calculation / Assessment	Quantitative – simple count of the number of capacity-building programmes
Means of verification	Project closure reports.
Assumptions	Availability and access to relevant data timeously and cooperation of key stakeholders

Disaggregation of Beneficiaries (where applicable)	The project is primarily targeted at the broader tourism sector value chain of tourism businesses, tourism workforce and unemployed youth, focusing on previously disadvantaged groups from all corridors of Gauteng
Spatial Transformation (where applicable)	The project will be implemented in all corridors of Gauteng primarily targeting township beneficiaries.
Calculation Type	Non-cumulative
Reporting Cycle	Quarterly
Responsibility	Head: Tourism Support

Indicator Title	Output Indicator 3: Number of incubator programme implemented
Definition	This indicator refers to the aggregated number of SMMEs / Entrepreneurs that participated in business development incubator/ training programmes executed over a longer period directly or indirectly through GTA or leveraged through collaborations with key partners or institutions meant to enhance business efficiency, responsiveness sustainability or create a pool of tourism expertise to enhance tourism service excellence and economic growth. These might entail focused interventions directed to Eateries/ Chefs, Events companies, PCO's, Tour Operators trained/ incubated to becomes Destination Management Companies, Tour Guides, etc.
Source of data	Approved project implementation report
Method of Calculation / Assessment	Simple count
Means of verification	Project implementation report with a list of beneficiaries
Assumptions	Availability and access to relevant data timeously and cooperation of key stakeholders
Disaggregation of Beneficiaries (where applicable)	The project is primarily targeted at tourism businesses and services, focusing on previously disadvantaged groups from all corridors of Gauteng primarily targeting township beneficiaries.
Spatial Transformation (where applicable)	The project will be implemented in all corridors of Gauteng primarily targeting township beneficiaries.
Calculation Type	Non-cumulative
Reporting Cycle	Quarterly
Desired Performance	Business sustainability leading to service excellence
Responsibility	Head: Tourism Support

Indicator Title	Output Indicator 4: Number of Tourism SMMEs provided with access to markets
Definition	This refers to SMMEs provided with access to markets to showcase their businesses or implement actual business activities in those markets. Source markets are identified and implemented through destination marketing, management, and development projects.
Source of data	Approved project implementation report
Method of Calculation / Assessment	Simple count
Means of verification	Implementation report and market access forms
Assumptions	Destination marketing and Management and Development will provide opportunities for GTA to leverage SMMEs.
Disaggregation of Beneficiaries (where applicable)	Women businesses (35% of the set target) Youth businesses (35% of the set target) Township businesses (70% of the set target)

Spatial Transformation (where applicable)	The project will be implemented in all corridors of Gauteng primarily targeting township beneficiaries.
Calculation Type	Non-cumulative
Reporting Cycle	Quarterly
Desired performance	Higher than the fixed target
Responsibility	Head: Tourism Support

Indicator Title	Output Indicator 5: Number of tourism attractions provided with safety support programme
Definition	The number of programmes implemented to guide visitors in terms of safer areas or Tourism safety tips to avoid criminal activities being perpetrated against them and or further guide and or provide assistance in unfortunate cases where they fall victim to criminal incidences, such as collaboratively working with and within the safety cluster on incident management, facilitating counselling, liaising with relevant embassies/ high commission/ Department of Home Affairs or Airline companies for the issuance of emergency replacement of citizenship or travel documents if the incidences contributed to their loss and other related services
Source of data	Visitor safety incidence reports
Method of Calculation / Assessment	simple count
Means of verification	Incidence reports
Assumptions	Not applicable
Disaggregation of Beneficiaries (where applicable)	Not applicable
Spatial Transformation (where applicable)	All corridors
Calculation Type	cumulative
Reporting Cycle	Quarterly
Responsibility	Head: Tourism Support

12.ANNEXURE A: AMENDMENTS TO THE STRATEGIC PLAN

There were amendments to the Strategic Plan. Please see the tables below: The 2020/21 – 2024/25 Strategic Plan

OUTCOME	Outcome Type	Outcome Indicator	2019 baselines	5-year target
Impact: Gauteng is recognized as a globally competitive destination of choice				
Ultimate Outcome: Economic growth, job creation and infrastructure				
<i>Tourism contributed to the GPG Economy</i>	Intermediate	Total Foreign Direct Spend	R25 bn	R60 bn
		Total Domestic Direct Spend	R7.7bn	R50 bn
		The number of direct and indirect sector jobs created	32 000	45
Value generated through tourism uptake	Immediate	The number of international arrivals	3.3m	4.4
		The number of domestic trips	6.7m	7m
Positive impact on tourism growth among hosting communities	Intermediate	Direct and indirect rand value generated through supported events	R2.1 bn	R10 bn
		The number of events participants	862 854	2m
Inclusive and sustainable tourism growth	Immediate	The number of people who participated in hosted community /township events	-	350 000

Outcome	Outcome Type	Outcome Indicator	2019 baselines	5-year target
Impact: Sustainable tourism development to accelerate the transformation of the tourism sector				
The ultimate outcome: Reduced inequality within and among communities				
Visitor experience enhanced.	Intermediate	The number of businesses graded	-	3000
Tourism offering differentiation	Immediate	The number of new products developed	1	2
Transformed local tourism		The number of special strategic projects implemented to support local tourism programmes	1	5
Tourism shares increased		Rand value facilitated for SMMEs through destination marketing and development projects.	R37 m	R80m
Township community's empowerment and youth employability	Intermediate	The number of SMMEs given access to markets	130	700
A range of youth-directed upskilling and youth employment opportunities developed at Gauteng attractions and experiences.	Immediate	The number of youths placed for job opportunities	-	3000
Tourism Entrepreneurship and SMMEs Development		The number of SMMEs incubated	-	450
Township communities' empowerment and youth employability		The number of youths trained in tourism skills	-	2000

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