

PORTFOLIO COMMITTEE ON TOURISM

Tourism Growth Partnership Plan (TGPP) 2025-2030

3 March 2026

broadening horizons



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA



Strategic Focus of the TGPP

- The **Medium-Term Development Plan (MTDP)** identifies tourism as a labour-intensive sector to support job creation;
- MTDP aims to increase access to international tourism and increase the economic contribution of tourism to the **Gross Domestic Product (GDP)**;
- The **Government of National Unity (GNU)** resolved that the next five years will be focused on actions that will drive:
 - Inclusive growth and job creation;
 - Reduce poverty and tackle the high cost of living; and
 - Building a capable, ethical and developmental state.
- The Department reviewed all strategies and policies. TGPP priorities are aligned with the **National Development Plan (NDP)** the National Tourism Sector Strategy (NTSS), the Tourism Sector Master Plan, the MTDP, and the **Tourism White Paper of 2024**.
- The **Tourism Growth Partnership Plan (TGPP)** is the guide for growth in the tourism sector during the **7th Administration**.
- The strategic focus of TGPP is **collaboration between the public and private** sector ensuring exponential tourism growth.



Government economic policy aims to drive rapid and inclusive economic growth

Drawing on the Medium-Term Development Plan (MDTP) and the Growth and Inclusion Strategy (GAIN), the following **six principles** are crucial for achieving this growth :



1
Prioritise growth in **labour intensive sectors**, focusing especially on those industries that **create jobs for young people and women**.



2
Prioritise **Whole-of-Country development**, focusing especially on **tourism infrastructure**, inside and outside of major urban centres.



3
Prioritise industries that have an **inherent competitive advantage** with opportunity for **sustainable growth**.



4
Prioritise **environmentally sustainable and responsible development** that focuses on a low-carbon economic model.



5
Prioritise industries that can take **advantage of global markets** even when the domestic market is experiencing challenges.



6
Prioritise sectors that create opportunities for **small businesses** and that will benefit from **red tape reduction**.

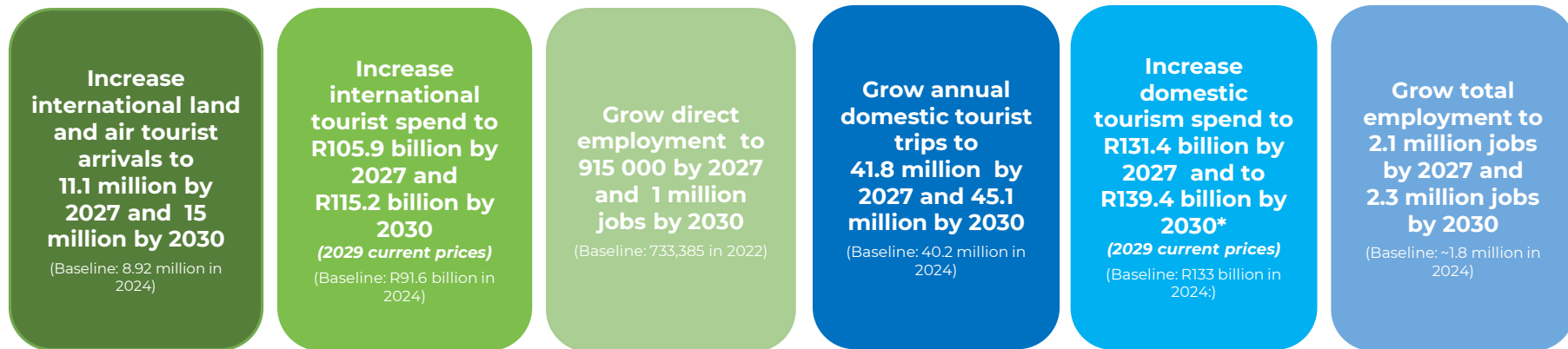
The tourism industry meets all six of these principles, making it one of the most powerful sectors for driving rapid, inclusive and sustainable economic growth.

Tourism is also one of the most effective sectors for mobilizing private investment, crowding in capital across infrastructure, hospitality, transport and digital services. Its value chain enables rapid conversion of global demand into domestic investment jobs and spatially distributed economic activity.

TGPP positions Tourism as a driver of inclusive economic growth and job creation

- **Historically, tourism has been a significant contributor to GDP and employment, but it has remained underweight.**
- **For this reason, the Cabinet has approved the Tourism Growth Partnership plan, or TGPP - a five-year strategy to position tourism as a key driver of inclusive economic growth and job creation and unlock a higher growth path for the sector. It was launched by the Minister of Tourism, Patricia de Lille, together with public and private sector partners.**
- **The TGPP builds on previous strategies, including the National Tourism Sector Strategy and the Tourism Master Plan, and aims to exponentially grow tourism in South Africa to achieve ambitious targets by 2030.**

TIMELINES:



* Domestic Spend targets and baseline to be reviewed, based on discrepancies

2025 Breakthrough for Tourism, Record international arrivals & the launch of the ETA



- ✓ **In September 2025, Minister Schreiber announced South Africa's Electronic Travel Authorisation (ETA)** - a new fully digital entry permit replacing or supplementing traditional paper visas for tourists.
- ✓ **The ETA is already streamlining visa processing for visitors from China, India, Mexico and Indonesia** boosting tourism by making it faster and easier to enter our country. The key focus in 2026 for destination marketing will be on activation the markets in China and India.
- ✓ **Five dedicated public-private TGPP working groups are now active** covering *Ease of Access, Destination Marketing, Safety and Security, Product Development and Infrastructure, and Job Creation and Skills Development*, meeting on a monthly basis to track progress through a live dashboard
- ✓ To diversify our tourism offering, we have developed eight bankable projects valued at more than R1 billion launched at inaugural **Tourism Investment Summit** of September 2025. The pipeline will continue to be built towards the second **Tourism Investment Summit** in September 2026.
- ✓ **International tourist arrivals at 10.48 million** have surpassed the pre-COVID levels, solidifying tourism's role in driving economic growth and investment. Our target for 2027 is to reach 11.1 million to ultimately reach our **2030 target of 15 million arrivals**.
- ✓ **South Africa successfully hosted the G20**, serving as a marketing platform for the country. announcement that Davos WEF Spring will be hosted in South Africa further signals growing confidence in the country as a convening **MICE** (meeting, incentives, conferences and events) destination. For the 2026 financial year, we submitted 95 bids and successfully **secured 51 bids, that will generate R894.5 million** in economic impact.



Broad-based growth, driven by sustained increases from key source markets

10.48 million international tourists visited South Africa in 2025.

This is 1.57 million more than last year, representing an impressive 17.6% year-on-year (YoY) growth.

3 million of these arrivals came by air.

This means air arrivals grew by 13.6% YoY, and an additional 360,000 tourists arrived by air compared to last year.

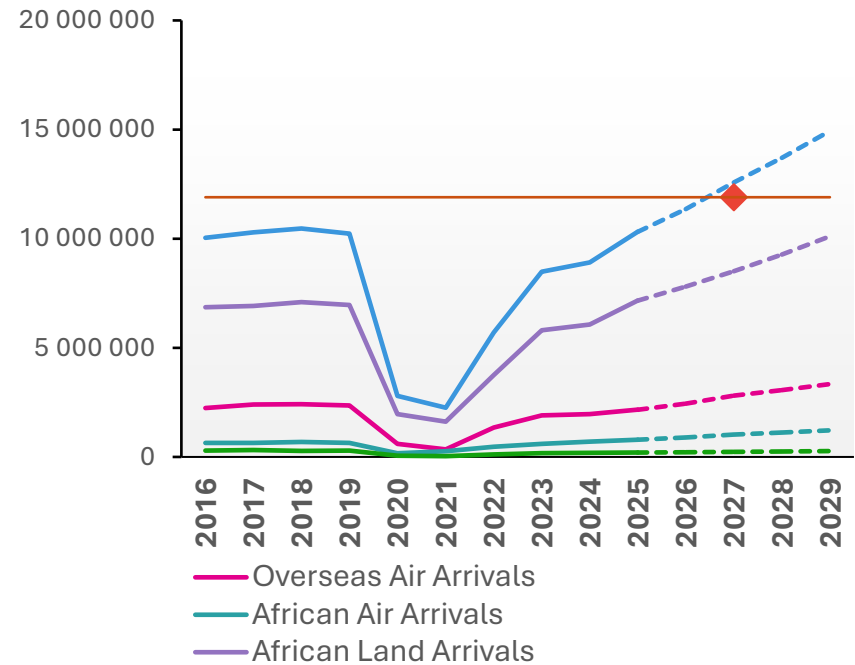
7.2 million were African land arrivals.

This marks a 20% year-on-year growth rate

It is estimated that **1 direct job and 3 indirect jobs are created for every 13 international tourist arrivals.**

The additional 1.57 million arrivals this year **added an estimated 120,000 jobs** (direct, indirect and induced) **to our economy.**

Figure 2: Historical International Arrivals and TGPP targets (2016 – 2029)



The dotted lines represent TGPP targets going forward to end-2029

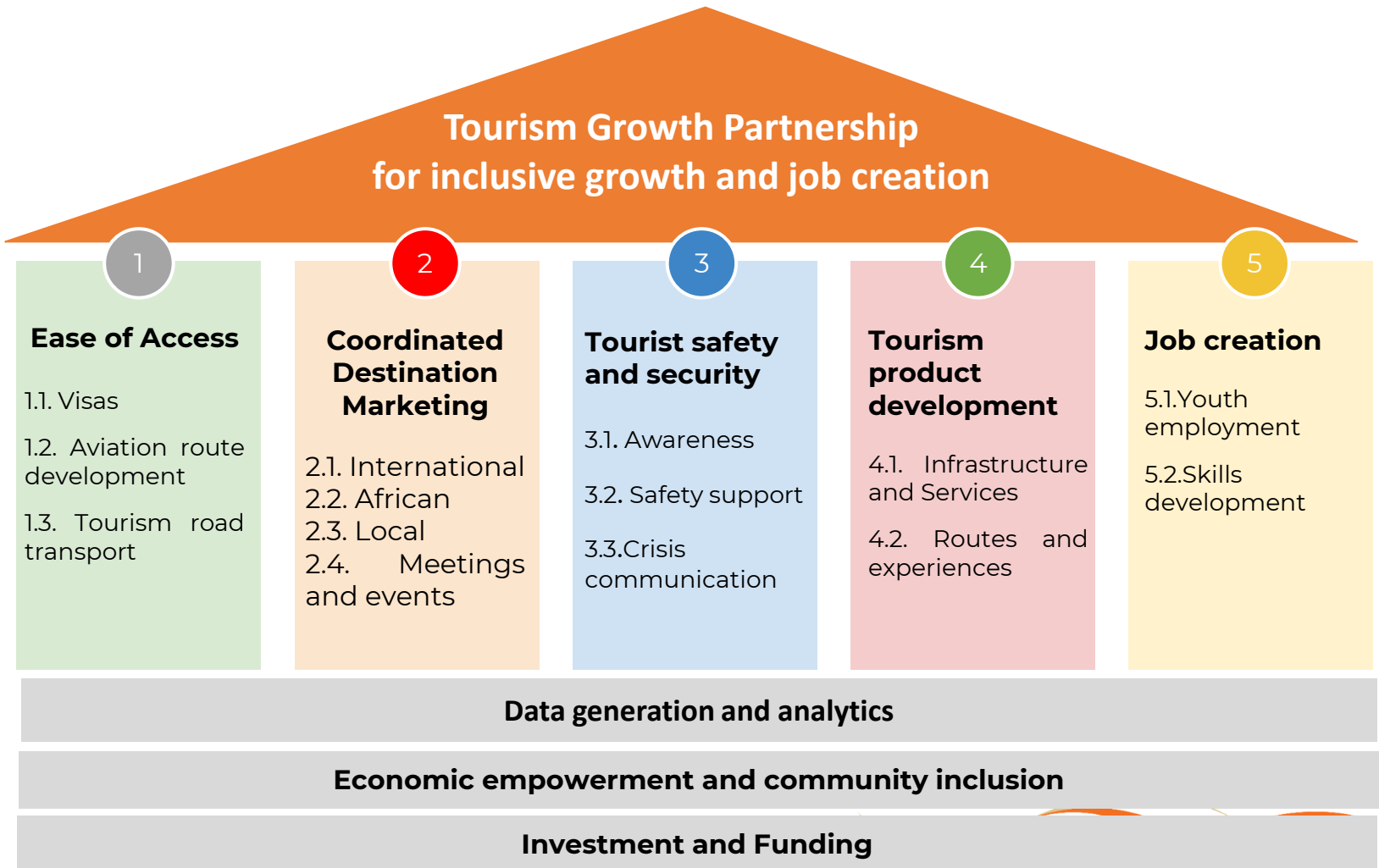
The 10.48 million international arrivals recorded in 2025 represent the highest annual total ever achieved in South Africa.

Source: Stats SA Monthly & Yearly Tourism reports (2016-2025). Job estimates calculated using a Social Accounting Matrix model. Further detail available upon request.


2026: Unlocking key opportunities

-  **Electronic Travel Authorisation.** We are working alongside the Department of Home Affairs to ensure that the ETA is fully implemented, marketed and extended beyond the four pilot countries.
-  **Transport Licensing.** We are working with the Minister of Transport and Vulindlela to fix bottlenecks in the tourism transport licensing system.
-  **Investment.** We have hosted our first Tourism Infrastructure Conference in 2025 and continue to build the project pipeline to unlock blended finance across priority tourism infrastructure and product development.
-  **Youth Employment.** We are working to link graduates in need of work experience to industry through the Harambee Youth Employment Accelerator and the Presidential Youth Initiative
-  **Tourism Safety.** We are working to eliminate crime through the Tourism Safety Forum and in collaboration with the South African Police Service and the private sector
-  **Route Development Marketing Strategy.** We are implementing the Cabinet decision on the national marketing strategy for route development to increase connectivity to and within South Africa.
-  **Job creation.** We are working together with the private sector to grow the number of opportunities within the tourism sector reach our 2030 target of one million direct jobs in tourism.
-  **Through the EPWP budget,** the Department of Tourism has committed to assist the public and private tourism establishments, as well as surrounding communities, in cleaning after the flood disaster.

Five Pillars: Tourism Growth Partnership Plan



Overview of TGPP Working Groups

 **To deliver on the TGPP**, a national, coordinated mechanism was created with five thematic Working Groups.

Working Groups & Leads

- **WG1: Coordinated Destination Marketing** – *Co-chaired by SAT & TBCSA*
- **WG2: Job Creation & Skills Development** – *Co-chaired by Harambee & NDT*
- **WG3: Ease of Access** – *Co-chaired by NDT & Home Affairs*
- **WG4: Infrastructure & Product Development** – *Co-chaired by NDT & Private Sector Panel*
- **WG5: Safety & Security** – *Co-chaired by NDT & SAPS/Industry*

Overall Progress to Date

- All WGs have moved from diagnostics to **implementation**.
- Stronger public-private coordination established across marketing, skills, access, infrastructure, and safety.
- Early TGPP targets already showing impact (e.g., 10.48m arrivals in 2025).

Progress: Marketing + Jobs & Skills

Working Group 1: Coordinated Destination Marketing

Leads: South African Tourism (SAT) & TBCSA

Key Achievements:

- Joint Marketing Action Plans initiated for **India, China, Indonesia, Mexico**.
- Two workshops held (Nov 2025) to shape China & India plans.
- **ETA marketing approved from 1 March.**
- Draft **National Business Events (MICE) Strategy** developed.
- Improved public-private alignment; 15 strategic global trade platforms identified.

Working Group 2: Job Creation & Skills Development

 **Leads:** Harambee Youth Employment Accelerator & NDT

Key Achievements:

- National diagnostic completed on **jobs, demand hotspots, and multipliers**.
- Supply-side mapping revealed **TVET drop-off >50%** and misalignment with industry needs.
- Pathways mapped with YES, Harambee, Airbnb Academy, major employers.
- Drafting a **national demand-led skills roadmap**.
- Developing a **Tourism Opportunities Tracker** with Harambee.

Progress: Ease of Access + Infrastructure

Working Group 3: Ease of Access

Leads: NDT & Department of Home Affairs

Key Achievements:

- **Supported ETA pilot** during G20; system performance strong.
- Route Development Marketing Strategy advanced; SAT service provider appointed.
- National stakeholder meeting convened with provinces, ACSA, and industry.
- Ongoing monitoring of NPTR licensing reforms with the Presidency's Red Tape Unit.
- Annual **international arrivals targets** to 2029 established.

Working Group 4: Infrastructure & Product Development

Leads: NDT & Public-Private Advisory Panel

Key Achievements:

- Tourism infrastructure pipeline prioritised; Batch 1 packaged for investor summits.
- Brownfield Resorts Network (BRN) concept finalised.
- Lead project identified: **2027 Cricket World Cup route & product development**, focused on East London.
- Priority enabling infrastructure identified (e.g., **East London wastewater/sewerage**).
- Revised WG4 mandate strengthens quarterly public-private engagement.

Progress: Safety & Cross-Cutting Themes

Working Group 5: Safety and Security

Leads: NDT & SAPS with Industry Partners

Key Achievements:

- Reviewed National Tourism Safety Strategy; improvements identified.
- National operator survey conducted to map crime hotspots.
- Targeted deployments supported in **Hazyview–Kruger Gate, NMB beachfront, Durban.**
- Strengthened festive-season communication protocols.
- Private sector exploring a **tourist aftercare fund.**

Cross-Cutting Themes:

Data & Analytics

- Workshop held with Stats SA, SAT, NDT.
- **Priorities:**
- TSA publication frequency, jobs data, alignment of domestic surveys,
- Establish a Tourism Data Hub.

Economic Empowerment & Inclusion

- **Diagnostic underway** on empowerment funding (IDC, NEF, TTC, SEDFA, PIC).
- **Identifying barriers** for women, youth, and community ventures.
- Recommendations to follow under TGPP.

TGPP Progress, Impact and Implementation Momentum

Overall Progress

- The TGPP has shifted from planning to **active implementation**, with all five Working Groups delivering concrete outputs across marketing, skills, access, infrastructure, and safety.
- **Public-private collaboration** has strengthened significantly, creating a unified national approach to tourism growth.
- **Early reforms**—ETA rollout, Route Development Marketing Strategy, safety deployments, and skills pathway mapping—are already improving system performance.

Conclusion

The TGPP is delivering **tangible, measurable progress**, with early indicators showing strong recovery, improved coordination, and growing investor and industry confidence. The next phase focuses on **scaling, deepening reforms**, and ensuring that tourism growth translates into **jobs, inclusion, and sustainable competitiveness**.