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TOURISM LEADERSHIP CONFERENCE 2026

TBCSA
TOURISM BUSINESS COUNCIL OF SOUTH AFRICA
THE LEADING VOICE IN TOURISM

TOURISM BUSINESS COUNCIL OF SOUTH AFRICA LEADERSHIP CONFERENCE

DAY ONE: 28 OCTOBER 2026

Theme: 30 Years in Tourism Still Matters
Programme Director: Nozipho Tshabalala

Summary: Day One of the TBCSA Tourism Leadership Conference 2026 started with an afternoon session examining tourism trends, key insights and reflections from SA Tourism, SATSA, the MICE industry and TBCSA.

1. Jerry Mabena: TBCSA Chairperson

Topic: *Welcome and Conference Purpose*

Summary: TBCSA chairperson Jerry Mabena officially welcomed delegates to the 5th Leadership Conference. As the Council marks its 30th anniversary, Mabena highlighted the importance of tourism as an important driver of economic growth, employment and wider participation in South Africa's economy. He also reflected on the Council's role since its establishment in 1996, including, among others, the Tourism Marketing Levy (TOMSA), advocacy on visas, air access, safety and investment, and its response to the COVID-19 crisis.

Key Insights:

- This year we celebrate 30 years of representing, supporting and championing South Africa's tourism industry.
- Tourism matters today more than ever before – because of its contribution to the economy, job creation and economic opportunities for historically excluded communities.
- When the TBCSA was established in 1996, South Africa was a young democracy finding its place in the world.
- TBCSA played the role of an organised private sector voice that could work with government to develop and grow the sector.
- Council created an environment in which tourism businesses can operate, compete and grow.
- Behind the numbers are people, families and communities whose livelihoods depend on the success of this industry.
- Organised business working closely with government to address the structural challenges holding back our economy and unlock opportunities for growth.
- Tourism has been included in the third phase of the Government-Business Partnership.
- We already have an important foundation through the Tourism Growth Partnership Plan.
- Our responsibility now is to turn these commitments into results.
- One area that remains particularly important is rural tourism. These communities remain on the margins of the tourism economy.
- We must also ask whether the communities around our tourism assets are benefiting from the economic activity taking place.
- •Rural tourism businesses need access to markets, financing and reliable infrastructure.
- SMMEs cannot thrive where the basic conditions for doing business do not exist.
- Four outstanding young people are joining us from four different provinces. Their businesses span educational tourism, cultural experiences, nature and adventure tourism, and traditional crafts.
- The next chapter must be defined by a tourism economy that grows faster, reaches further and creates opportunities for more South Africans.

2. Message from Tourism Minister Patricia De Lille

Read by TBCSA Chair Jerry Mabena.

Summary:

- Minister de Lille expressed regret for not being able to attend the Leadership Conference in person. She noted that she never misses an opportunity to engage TBCSA, challenge it and sometimes be challenged by it. She noted the TBCSA's 30-year anniversary milestone. The minister thanked everyone who works hard alongside the government to help grow the industry.
- Minister de Lille noted the Global Champion Award she received from the WTTC, saying it was a proud moment for South Africa. She said it belonged to all the people who work tirelessly to grow South Africa's tourism economy.
- The minister said the Tourism Growth Partnership Plan is a shared commitment to action, removing barriers, opening air access, improving visa access, strengthening our destination marketing, developing our tourism products, and creating

opportunities for more South Africans to participate in this wonderful industry.

- The minister concluded by noting that there is still much work to be done to reach SA's ambitious target of 15 million international arrivals by 2030. She noted that the real measure of success will not simply be how many visitors arrive but the number of people who find work, the number of small businesses that grow and the rural communities that benefit.

3. Hon. Najib Balala: Executive Vice President, World Travel and Tourism Council (WTTC)

Topic: *Global Tourism Outlook: How Can Africa Take Advantage?*

Summary: Hon. Najib Balala, Executive Vice President of the World Travel & Tourism Council (WTTC), discussed the global outlook for tourism and strategies for Africa – specifically South Africa – to harness its potential and compete on the world stage. The WTTC was established 35 years ago and stands as a repository of data collected in 154 countries in more than three decades.

Key Insights:

- WTTC recently honoured the South African Minister of Tourism, Patricia De Lille in Malta as the global champion.
- Global advocacy is very important; tourism needs to be highlighted at the tables where policymakers, scenario planners and economists sit.
- Africa is currently under-represented in global tourism despite its massive potential.
- •Hon. Balala emphasised the need for Africa to act as a single, cohesive market to profit from the opportunities on the global stage.
- According to the data on African travel and tourism in 2025, SA has the largest tourism economy in Africa.
- 99 million arrivals were recorded in Africa in 2025, comparable to the whole of Spain in the same period, just below France.

Five key strategic priorities for Africa's growth:

1. Seamless travel through improved connectivity, biometrics, and simplified visa processes
2. Infrastructure and investment based on seven core principles for legal certainty and strategy
3. Crisis preparedness and narrative management
4. Workforce development to address a projected 9-million-person talent deficit in the sector
5. Sustainability and conservation

- **The role of political will:** tourism sector must engage beyond its own circle, specifically advocating for the inclusion of finance, transport, and security ministers in strategic meetings to ensure policy impact.
- Challenged TBCSA to move beyond internal focus and become the leader for the rest of the continent, leveraging its established position
- Hon. Balala emphasised the importance of speed in executing incentives and the necessity of developing intra-Africa travel to grow the aviation sector.

WTTC's seven principles of investment for growth:

1. Provide legal certainty and predictability.
2. Establish a one-stop shop for tourism investment.
3. Publish a tourism strategy with full stakeholder alignment.
4. Provide competitive fiscal incentives.
5. Guarantee strong support from top levels of government.
6. Draw up a comprehensive destination master plan.
7. Support sustained growth and the market potential of the sector.

4. Joe de Beer: Stats SA DDG

Topic: *Tourism by the Numbers: A View from Stats SA*

Summary: Joe de Beer from Stats SA provided a statistical overview of South Africa's tourism sector, detailing its post-pandemic recovery, contribution to the national economy, employment landscape, visitor spending patterns, and accommodation trends. The data underscores tourism's vital role as a major economic pillar, outperforming several traditional sectors like agriculture, utilities, and construction.

Key Insights

1. Statistical Overview

- Statistics offer a review of tourism. The numbers reflect what has already happened and help to better prepare for the future.
- South Africa's economy grew by 1,1% in 2025. Gauteng remains the largest economy, accounting for a third of South African GDP or 33.2%, followed by KZN with 16.1% and the Western Cape with 14.2%.
- **Major Economic Driver:** Tourism contributed R361,7 billion (or 4,9%) to South Africa's GDP in 2024. The tourism sector is larger than traditional industries such as agriculture, utilities, and construction.
- **Job Creation:** The official unemployment rate was 33.6% in the second quarter of 2026. The sector directly employed 953,981 South Africans in 2024, meaning 1 in every 18 employed individuals in the country worked in tourism. Tourism directly accounted for 5,7% of South Africa's total workforce.
- **Demographics:** Black Africans represented 77% of individuals directly employed in the sector, and women accounted for 39% of the tourism workforce.

2. Visitor Arrivals & Recovery

- **Full Recovery Achieved:** International tourist arrivals and tourism employment have both successfully surpassed pre-pandemic (2019) levels.
- There were just over 1 million tourist arrivals in August 2026. The number of tourists visiting South Africa exceeded the 2019 level in 2025. Most foreign arrivals visited the country for a holiday.
- **Regional Breakdown:** The majority of foreign arrivals come from the African continent (77,1%), with 75,2% originating from SADC countries (led by Zimbabwe). The United Kingdom remains the leading country for overseas tourists.

3. Domestic Tourism Foundation

- **The Backbone of Spend:** Domestic tourism remains the foundation of internal travel expenditure. Domestic visitors spent R665 billion in 2024, accounting for 85% of total internal tourism expenditure.
- **Travel Habits:** Total day trips and overnight trips saw slight contractions year-on-year from 2024 to 2025, with personal shopping driving day trips and visiting friends/relatives driving overnight trips

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4. Inbound Spending & Trade Balance

- **International Spend:** International visitors spent R113,9 billion in South Africa in 2024.
- **Positive Trade Balance:** Tourism generated a positive travel trade balance of R29.8 billion (inbound spend of R113.9 billion versus outbound resident spend of R84.1 billion).

5. Accommodation & Inflation Pressures

- **Occupancy Rates:** Hotels recorded an average occupancy rate of 56,2% in July 2026, outperforming guest houses/farms (24,6%) and camping/caravans (22,1%).
- **Inflation Headwinds:** Annual inflation for hotels peaked at 14.6% in March 2026, while fuel inflation reached 27.9% by September 2026, posing rising cost pressures on travellers and operators.

5. Sandeep Chagger: MD Africa, Peach Payments

Topic: *Tourism and the digital economy: How we are paying for travel*

Summary: Digital payments and the use of digital platforms for tourism purposes are increasingly connected. Travellers, particularly younger people, find travel ideas on social media before moving online to decide, book and pay. Sandeep Chagger highlighted that, for tourism businesses, the central challenge is to make that journey seamless while accommodating a widening range of payment preferences. He explained that payments are part of the booking experience, where travellers or users expect speed, flexibility, familiar payment methods, transparent charges and visible security. Fragmented payment systems and declined transactions can interrupt bookings, while locally relevant options may help businesses serve domestic, regional and international guests.

Key Insights:

- The traveller's journey begins during the booking process. Once a destination has been chosen, a booking is made, followed by the payment. This process needs to be seamless rather than treating payment as a separate experience.
- A uniform card-only payment approach may not be suitable for every market. Africa is not a single payment market. Businesses in the tourism space need to be cognisant of the various payment systems throughout the continent. In Kenya, for instance, the use of mobile money, or MPESA, is prevalent. But, in countries like the DRC, where fewer people are banked, cash is king.
- The five checkout expectations identified are speed, flexibility, familiarity, no surprises and visible security. Convenience alone does not capture the full traveller experience.
- Payment friction can undermine booking conversion. Choosing a payment method, verification, approval and charging are identified as points where a booking can break down. India has 555 million UPI consumers, 32.8 million outbound travellers in 2025 and more than 70,000 who travelled to South Africa.
- Businesses are encouraged to be findable by AI as well as search engines, with checkout able to follow the booking journey. Trust should also precede automated transactions.

Four questions for every tourism business:

1. How is the way people pay for travel changing?
2. What payment expectations do travellers bring to booking?
3. Where do payments still cost the business bookings?
4. What should the business prepare for as the digital economy develops?

- There is an expanding payment mix beyond cards and more flexible ways to book and pay. However, fragmentation across providers and markets continues to persist, even as the booking process becomes more seamless.
- South Africans are increasingly using AI adoption in their tourism decision-making.
- Peach Digital works with multiple payment providers, supporting international travellers transacting in South Africa and offering one partnership across 15 African markets. Its proposition centres on reducing fragmentation and integrating payments into existing travel systems.

6. South Africa's Tourism Debate: Where will growth come?

Panellists: *Ramasela Ganda: Group CEO, Zeda Limited; George Mothema: CEO, BARSA; Lidia de Olim: Bidvest Travel Holdings; Wrenelle Stander: Wesgro*

Moderator: *Lindelwa Isabelle: Deputy Chairperson, TBCSA*

Summary: The general sentiment is that tourism still matters. The key for South Africa is to ensure better air connectivity, increase target markets, and ensure the geographical spread of tourism to other regions of the country. The opportunities in rural tourism are yet to be fully tapped. Destination South Africa is a collective product that ought to be marketed as such.

Key Insights:

- SA should ensure that it can bring in flights traffic from all its source markets and beyond.
- It is important to ascertain who benefits from SA's growth. Tourism is a connector where all parts must work together. In SA, there is a lot of fragmentation – the country needs to be framed as one brand.
- SA needs to find new markets beyond the traditional source markets. In India, efforts are under way to understand the payment system. There is a big campaign in China, which is a complex market that requires specific tools. Azerbaijan is another new market that will have to be approached in phases.
- For the Western Cape to grow, South Africa must grow. People want to see parts of SA and the greater continent.
- The domestic market needs to have a seamless focus on providing memorable experiences to travellers. SA needs to ensure that visitors return.
- The use of technologies and updated payment systems will hold SA in good stead in the face of growing competition for source markets.
- The culture and the experiences found in townships and rural areas must be harnessed. There is an opportunity to invest in the rural markets, empower locals and leverage opportunities.
- SA should view technology as a tool to improve its tourism offering. Businesses should embrace technology, ensure they are present on social platforms, and be connected to social and online networks. SMEs must also be available to networks of consumers.
- There are limited frequencies available, which means SA should enter into co-sharing agreements. There should be continued lobbying of government to assist with easing the bottlenecks. Some of the co-sharing agreements for frequencies are determined through bilateral agreements.
- South Africa will have to acquire more frequencies to enter some of the targeted markets. Those initiatives will support marketing happening in tourism. Political will is also necessary. Domestic carriers are focusing on Africa, and more global reach is needed.
- There is a new push to ensure that SA recovers the destinations lost due to the visa requirements. There are also efforts to build experiences into districts and townships and build experiences that offer adventure and culture.
- Perceptions about safety need to be improved through investment. South Africans should also be more positive about their country.
- SA is rich in culture, heritage diversity, and even geography. Visitors need to know they can experience more than just beaches and the safari on their visit to SA. All the various experiences need to be bundled together.
- As long as geopolitical tensions persist, those issues will continue to impact the local industry. We need to ensure more investment in the market.

7. Dr Negar Rezvany: IATA Sustainability and Economics

Topic: *Global Tourism Outlook: An Aviation Perspective*

Summary: Dr Negar Rezvany explored the intersection between global tourism and air transport, focusing on South Africa and Africa's aviation landscape. While global passenger demand continues to expand post-pandemic, the African aviation market faces severe structural bottlenecks, high operational costs, and the oldest commercial fleet in the world. Despite

these challenges, aviation remains a key economic driver and the backbone of international tourism for South Africa.

Key Insights:

- In 2025, air transport directly connected South Africa to 42 countries across 186 scheduled passenger routes, supported by 21 airports and 50 airlines.
- The United Kingdom is South Africa's leading international travel source market (10.4% of traffic), followed by Zimbabwe (8.4%) and the United States (7.0%).
- South Africa recorded 6.1 million international passenger departures in 2025, marking a 7.5% year-on-year growth. South Africa ranks 55th globally and 3rd in Africa for outbound air travel volume.
- While passenger traffic to and from the wider African continent has fully recovered and surpassed 2019 pre-pandemic baseline levels, South Africa's traffic recovery index has hovered just below 2019 levels.
- Aviation is a major contributor to the national economy, generating $1.7 billion USD in GDP (roughly 1.7% of national GDP) and supporting 328.6 thousand jobs (1.3% of total employment).
- African carriers operate the oldest commercial fleet in the world, averaging 5.3 years older than the global industry average, which creates a heavy drag on fuel efficiency and maintenance.
- Africa suffers from high unit costs of operations (CATK is 19% above the rest of the world average), driven by expensive fuel, high taxes, charges, currency volatility, and blocked funds.
- Africa is the least profitable aviation region globally, with net profit forecasted at a meagre USD 0.4 per passenger in 2026.
- The African continent accounts for 18% of the world's population but only 3% of global seat capacity. Furthermore, African carriers record the lowest seat load factor among all global regions at 76% (compared to an 84% global industry average).
- Jet fuel prices surged to $187 USD per barrel by late October 2026, with fuel costs escalating to consume 31% of total airline operating costs globally.
- Global traffic is expanding despite geopolitical tensions and higher fares, but overall growth is decelerating. Total passenger traffic is projected to grow by 2.1% in 2026 globally, while Africa's regional traffic growth is projected at 10.0% (though from a much lower base).
- Long-Term Projections: Under IATA's mid-growth scenario, Africa's outbound RPKs are projected to grow at a Compound Annual Growth Rate (CAGR) of 3.6% through 2050, with intra-Africa routes expected to experience the fastest growth among all region pairs.

8. Functional Cities, Thriving Tourism: Why Local Government Matters

Panellists: *Ross Volk: MSC Cruises; Professor Busani Ngcaweni: University of Johannesburg; Zamo Gwala: SALGA; Hlengiwe Dube: Durban Tourism*

Moderator: *Nozipho Tshabalala*

Summary: The panel delved into the importance of functional local government and the benefits for the tourism sector. Infrastructure development and maintenance facilitate traction, job creation and economic growth. Successful destination marketing is anchored in municipalities that are safe and secure, offer a selection of cultural and adventure experiences, and have reliable public transport frameworks and a constant supply of water and electricity.

Key Insights:

- Roads, infrastructure and cultural offerings are important factors for cruise operators such as MSC.

The amenities and entertainment need to be readily accessible from the port. Lack of infrastructure disadvantages communities that are located outside the locale of the port. For routing to be successful, the whole ecosystem must be in order.

- The ability to move people easily and securely is an important consideration for businesses in the tourism industry.
- The enforcement of bylaws ensures that municipalities and cities function optimally. Traffic congestion requires visionary planning and the deployment of officers or technologies that ease congestion.
- Cities need to design operational architectures backed by credible knowledge systems such as universities and research institutes.
- City leaders need to know what their constituents want. The issues go beyond the provision of basic services such as water and refuse. Building heritage is just as significant, and so is building leaders who are ambitious.
- The genesis of all municipal functions is political and administrative leadership. A coherent approach that factors in all functions of society, including safety, immigration, etc.
- Political will is crucial in ensuring the enforcement of bylaws. The experience of travellers depends on the infrastructure put in place to support movement.
- The processing of regulatory applications for permits should be seamless. Cities need to have leaders who ensure that all facets of governance function.
- Travellers to SA need to experience what is advertised. Destination marketing goes hand in hand with delivery. There needs to be accountability when travellers do not experience what is promised.
- Tourism is a shared responsibility between the private sector, government and other role players. All stakeholders, be it safety, water or other operations, are part of the bigger picture.
- When all stakeholders have one goal or vision they are working towards, there will be success. In the lead up to the 2010 WC, there was one goal which united all stakeholders.
- The focus should be on the principle, building infrastructure, and supporting the economic endeavours of locals. South Africa is an opportunity waiting to happen.
- A city that works for its citizens becomes better for tourism. One of the goals is to ensure that the ecosystem benefits.

9. Tshifhiwa Tshivhengwa: CEO, TBCSA

Topic: *TBCSA at 30: Progress, Partnerships and Priorities*

Summary: Every year at the Leadership Conference, the CEO of the TBCSA provides feedback on the work done since the previous convening. CEO Tshifhiwa Tshivhengwa highlighted the importance of accountability and providing a progress report to the TBCSA community. The Leadership Conference sets goals for the year ahead, and those goals are driven by action. Every year the CEO's report begins with a look back at the 10 strategic goals set at the first Leadership Conference.

Key Insights:

1. **Automated world-class e-visas with improved airport e-infrastructure:** A lot of groundwork has been made, although much more still needs to be done in achieving the goal set. The process involves various stakeholders who must collaborate for the success of this goal.
2. **Waive visas to more source markets:** There has been progress with some countries approved. But the project is a work in progress.
3. **Critical skills visas, temporary work visas:** Critical

work visas speak to specific visas for tour guides who speak international languages. Teaching locals the language works in some instances, but it has been found that natural language speakers are more proficient and successful in connecting with tourists through language. Set aside some funds and lobby for the recruitment of language speaker tour guides to be recognised as a critical skill. The work and the lobbying continue. These are matters that are discussed at Nedlac.

4. **Vehicle licensing and reducing or fixing other red tape:** The transport department is part of the 2026 Leadership Conference and has provided feedback on the issues that previously created challenges for the sector, specifically for tour operators.
5. **Tourism safety:** This is an ongoing matter where we are seeking to improve safety and security in key tourist routes and areas. This is not only about the safety of the tourists. When all South Africans are safe, tourists will be safe.
6. **China Ready Strategy:** SA needs to have readiness for payments. Closing the digital divide between South Africa and the others and understanding the Chinese tourists holistically. This includes looking at hospitality in terms of catering, payments systems, translators and other important considerations as we look to grow numbers from that source market.
7. **Additional Funds:** More funds to be allocated towards destination marketing. There will be more advocacy for tourism allocation to the finance minister. Partnerships to accelerate economic growth, some of which include IDZs, which is an ongoing long-term plan.
8. **Business and government partnership:** The conversation on the 3% economic growth has mainly focused on creating growth while ensuring there are no job losses. The current rate of growth is not enough to create jobs. There is an ongoing debate and engagement between business and government to find ways to stimulate the necessary growth. In Phase 3 of the Business-Government, tourism is one of the four sectors that has been identified as crucial for jobs and GDP growth, alongside mining, agriculture and infrastructural development. There are two areas which are critical. Tourism accounts for 4.9% of GDP and 954K jobs. The aim is to grow from 3.04m air arrivals to 3.8m by December 2027. Expand air access and joint marketing initiatives. How to get there: Through investing in tourism growth and inclusive impact

- A collaborative fund was started in 2016 – collected from levies – and used for funding projects that are identified to potentially change the trajectory of the industry.
- Funds disbursed to projects to date: R32m
- DBN/GP air access
- SIGMA
- Incubation
- Greater Kruger
- Didima/Uthukela
- Rhino monitors with Kruger Park
- NMB Safety: Training young people to be peace officers at Summerstrand

Projects in the pipeline:

1. A unit within eThekwini for tourism safety
2. 24 hr surveillance between Hazyview and Kruger Gate

9. **Destination marketing: The second phase of the Trevor Noah campaign was launched in July.** The advert is just one part of the work that needs to be done. Locally, the new tourism show on SABC 1 was shot in all nine provinces. The one campaign reaches the world, and the other one reaches South Africans at home. The idea is to show South Africans that travel is closer than they think. Contracts have also been signed with 6 international DMZs. There

has also been an undertaking to intervene in the MICE space where there are gaps.

10. Government, Politics and the Economy: Is South Africa Positioned for Growth?

Panellists: *Dr Mpumelelo Mkhabela: Political Analyst and John Loos: Independent Economist*

Moderator: *Xoli Mngambi*

Summary: Destination South Africa has had its share of negative sentiment recently. The anti-illegal immigrants protests, service delivery failures, safety and security concerns, and rising unemployment are just some of the issues the country is grappling with. Despite the pessimism, the destination South Africa, however, remains a bucket-list destination for many travellers around the world. This debate focused mainly on what the country can do better to improve its growth prospects.

Key Insights:

- Despite the low optimism in the country, the political landscape has boosted economic sentiment in SA. Economic improvements in electricity supply and rail, for example suggest a country that is turning a corner.
- The greatest challenges for residents are jobs, service delivery, safety, security and illegal immigrants. This year's voting will be driven by the pressing local issues.
- There are significant structural reforms under way in SA. Local government was neglected for many years, and yet it is one of the keys to growth.
- South Africa, like every other nation, is risk-prone, some of which are endemic to the country, while others are broader.
- SA's political confidence crisis is seen in the levels of participation in democratic processes. Only 29 million people have registered to vote. About 17 million turn out to vote, with voter turnout at about 42%. The majority of people are not participating in the process.
- The low number of people participating in democratic processes expresses the extent of population confidence in the democratic political system/process. This is worrying, as people may look for other, non-democratic ways to express themselves.
- Geopolitically, South Africa has largely been ambitious internationally. Its participation at the United Nations, IJC and other fora indicate its morally correct positions.
- Domestically, however, SA has not matched its ambitions with capability. Although to some degree, there is a reform agenda under way, some of those reforms are not institutionalised and may be erased in the event of a change of political leadership.
- The reforms that are more institutionalised, such as those at Eskom and other SOEs, are yielding progress.
- The impact of local government on growth is massive. Service delivery challenges will drive businesses to areas where the delivery of services is prioritised.
- Past voting patterns suggest that voters tend to maintain the same patterns whether it be local or national elections.
- The attitude of voters towards local government is improving. The improvements in the supply of electricity, commuter trains, ports and rail help.
- Ubuntu is not law. Failure to implement laws and bylaws stands in the way of growth and development. Law can be humane, even its enforcement.

11. Mathabatha Mokonyama: Director-General, Department of Transport

Topic: *Fixing Transport Operating Licences: Progress on NPTR Reform*

Summary: The reforms to the NPTR system were

necessitated by, among others, industry concerns, service standards, delays in licensing and the escalation of some of the grievances and challenges to the highest authorities. DG Mathabatha Mokonyama outlined the challenges within the NPTR system and the progress in resolving those challenges.

Key Insights:

- The challenges with the NPTR were highlighted by the tourism sector, especially regarding operating licence backlog, red tape and administrative snags.
- The road to reform began in July 2016 when NPTR was operationalised.
- In July 2022, the Joint Task team was established.

2026 Progress Roadmap:

1. 2026: Genesis analytics
2. October 26: Final proposals
3. End of 26: Tourism and Transport ministers are set to agree on the final report.
4. The establishment of a working group.
5. Legislative and regulatory amendments
6. Operational Improvements
7. Digitisation and systems reform
8. Legislative and regulatory workstream

- Developed proposed amendments to the National Land Transport Regulations to reform the tourism operating process
- The aim is to simplify the processes linked to applications, renewal and operations.
- The proposed amendments are set to improve efficiency, reduce admin burden and strengthen the licensing environment.
- The draft amendment bill is out for public comments.

Aviation

- In terms of aviation, South Africa has bilateral agreements/services with the top 15 countries for aviation collaboration.
- However, the uptake from South African operators is limited. Out of the 335 available frequencies, only 17 have been taken by South Africa.
- The target for 2030 is for more to pass through ACSA channels and ensure that the spaces are hurdle-free.
- There is a commitment to work and partner with the tourism industry. The industry is a driver of growth and job creation and generating revenue in SA.
- Some of the laws are prohibitive, and defending protectionism can be self-defeating.

12. Mteto Nyati: South African Business Leader

Topic: *Leadership Masterclass: Building Businesses That Last*

Summary: Mteto Nyati is a South African business leader who has led various organisations in South Africa. He is the current chair of the Eskom Board. During his Leadership Masterclass, he outlined an approach to building enduring businesses through personal discipline, a clear strategy, cohesive teams and accountable execution. Drawing on his corporate experiences at JSE listed entities such as Altron, Microsoft and Eskom, he connected leadership intent with operational priorities and measurable deliverables. Nyati's presentation moves from self-awareness, values and purpose to strategic simplicity, execution roadmaps and operational measurement. It also stresses collaboration and the willingness to make difficult decisions. For a tourism audience, the relevant lesson is an organisational one: sustainable businesses need a shared direction, clear responsibilities and a balanced view of financial, customer and sustainability outcomes.

Key Insights:

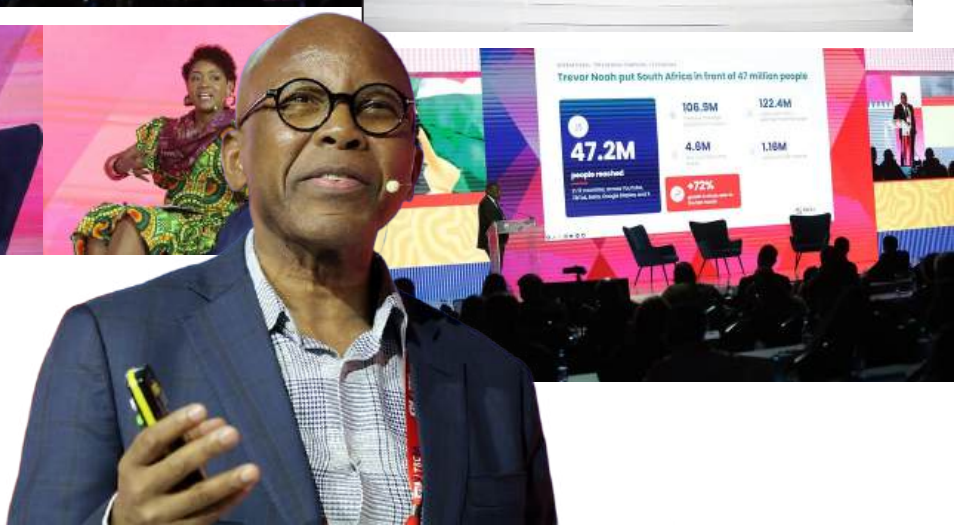
- You must manage yourself before you can lead someone else: this statement identified

self-awareness, personal vision, values, purpose and discipline as the core foundations of leadership. These can be supported through mechanisms such as executive coaching, leadership and management development, and performance management systems.

A journey towards personal mastery

- Self-awareness- How do you notice your impact, blind spots and default patterns as a leader?
- Personal Vision- What future are you committed to creating through your leadership?
- Personal Values- What values matter most to you as a leader?
- Purpose- What sense of life purpose do you bring to your leadership?
- Discipline- How do you exercise self-discipline in your leadership?

- **If you don't know where you are going, any road will take you there:** Nyati shared the One Altron strategy, developed at the company to bring purpose, vision, values, business segments and strategic priorities into a single framework.
- **The strength of a team is each individual member. The strength of each member is the team:** Recovery is presented as a structured operational process, with Nyati using the example of Eskom's generation recovery plan. That plan moved through enabling structures, execution and a longer-term performance ambition.
- **Clarity is the preoccupation of the effective leader. If you do nothing else as a leader, be clear:** the execution of a strategy roadmap organises work around revenue growth, profitability, customer experience and employee excellence across successive financial-year milestones. Its significance is the connection between broad priorities and staged deliverables, rather than a strategy remaining a statement of aspiration.
- **What gets measured gets done. And what gets recognised, gets done again, and even better:** The Altron operational dashboard included revenue growth, profitability, customer experience, employee-related measures and sustainability. This illustrates a broader view of business durability than a single financial indicator.
- **Effective leadership is not about making speeches or being liked; leadership is defined by results, not attributes:** As a leader, do not be afraid to make tough calls, but you also ought to consider the effect of your decisions or actions beyond the immediate work environment. As leaders, we sometimes make mistakes. It should never be above us to admit when we have made mistakes.
- **One of my greatest talents is recognising talent in others and giving them the forum to shine:** Recognise and acknowledge the strengths and weaknesses of your team. Know where each team member is positioned in terms of performance.
- **Courage is the most important of all the virtues because without courage, you can't practise any other value consistently:** the right thing to do and the hard thing to do are usually the same thing.
- **When people transcend their differences and work together to achieve a common goal, greatness is possible:** Collaboration and difficult decisions are complementary themes, in other words, working towards common goals and the willingness to make hard organisational choices go hand in hand.



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