



SOUTH AFRICAN TOURISM

LIVE SOUTH AFRICA NORTH EUROPE ROADSHOW

15 - 23 JANUARY 2024

OBJECTIVE:

The objective of this roadshow is to contribute to the growing of arrivals from the Netherlands and Belgium to South Africa. As the trade in these countries a key partners that we rely on to bring arrivals and assist in the acquisition of new customers for the destination, equipping the trade with product knowledge and new experiences that they can package is a pivotal requirement.

A secondary objective for this roadshow is to provide market access for the South African travel trade value chain (product owners) to Dutch and Belgian buyers (tour operators and travel agents).

This will be done through convincing the travel trade that currently sell South Africa that there is still ample opportunity beyond the high price and value packages that have been historically sold, while educating them about differentiated product and packaging opportunities. We will collaborate with South African trade and suppliers qualified to accompany South African Tourism to the Netherlands and Belgium in presenting the very best of what South Africa has to offer.

The following will be provided in order to assist you in compiling your application:

1. A summary of consumer insights, arrival and spend results
2. A list of our 6 key experience pillars that highlight our brand attributes that we use to market the destination
3. Program for roadshow and cities that will be visited
4. Costs of participation and inclusions
5. Instructions for applications product/accommodation suppliers/destination marketing organisations, and instructions for DMC applications - as these application processes will be different

NORTH EUROPE STRATEGY 23/24:

As a team leading growth and new customer acquisition out of North Europe (and as SA Tourism), we pride ourselves on decision making led by sound insights, data and research. The consumer set that holds the most potential for volume (numbers) and value (money spent in South Africa for tourism purposes) for the North European region is the customer set that is targeted in all our marketing communications and is central to all decision making we undertake as a hub. In stating this, the below



SOUTH AFRICAN TOURISM

is a summary of insights from the Netherlands, the biggest market out of this hub, documented in our brand tracker survey:

1. The total outbound long haul untapped consumer opportunity for the Netherlands is 6,6 million consumers. Of this number 72% of the consumer set is aware of South Africa and 36% are positive about South Africa as a destination.
2. Beautiful scenery, wildlife/safari, experience a different culture and adventure are the main reasons provided for travelling to South Africa
3. Sustainability and responsible tourism are key considerations that are taken into account when making decisions on where to travel. Values - based decision making is prevalent amongst younger consumers within younger cohorts (millennials, Gen Z) but is increasingly surpassing generational groupings as a need when making consumption decisions. Responsible tourism is therefore an important aspect of the South African product landscape that we aim to expose and educate Dutch and Belgian trade on through our platforms.
4. In 2022, total tourism foreign direct spend (TTFDS) was recorded as an average of ZAR 23 835 per traveller for the Netherlands and R21 507 per traveller for Belgium. These numbers indicate the value that travellers from these countries provide but also highlights the need for differentiation of packages and price points that are offered to the market. South Africa is currently seen as a high cost market based on packages currently on offer.
5. The travellers from this region are currently made up of 52% repeaters vs 48% first timers. This repeater/first timer split highlights the need for both classics (for first timers) as well as new, unique, off the beaten track experiences.
6. Arrivals from the Netherlands and Belgium from January to August 2023 are:
 - 90 639 from the Netherlands: a 52% increase from 2022 arrivals and 90% towards arrivals achieved for the same period in 2019
 - 32 361 from Belgium: a 42% increase from 2022 arrivals and 85% towards arrivals achieved for the same period in 2019

These arrivals solidifies the Netherlands position as the 4th largest international market behind the USA, the UK and Germany, and is the 3rd largest source market out of Europe.

The 90% progress towards 2019's recovery target can be attributed to consistent efforts by the North Europe team to showcase South Africa as a welcoming, responsible tourism destination, highlighting experiences that align with intrepid, green economy conscious and wanderluster consumer segment



SOUTH AFRICAN TOURISM

traveller needs. Continued arrivals and growth success is expected for the remainder of the year, following the launch of our localised "Live South Africa" campaign showcasing South African responsible tourism businesses: <https://www.southafrica.net/gl/en/trade/press/south-african-tourism-invites-travellers-from-north-europe-to-live-south-africa-in-new-campaign>

This campaign is ongoing and highlights that travelling to South Africa is a responsible tourism behaviour in itself, with tourism experiences, told through the eyes of the businesses positioned at the centre of the marketing work delivered by the hub.

KEY EXPERIENCE PILLARS

- Scenic beauty
- Wildlife and safari
- Active adventure
- Culture and roots
- City lifestyle
- Coastal beaches
- Sustainability

ROADSHOW DETAILS AND ITINERARY:

South African Tourism will take a total of 15 businesses on a roadshow through the Netherlands and Belgium, covering four cities. The details for this roadshow is as follows:

1. Amsterdam (the Netherlands): 16 - 17 January 2024
2. Den Bosch (the Netherlands): 18 January 2024
3. Antwerp (Belgium): 19 January 2024
4. Brussels (Belgium): 21 - 22 January 2024

We are targeting 120 - 140 pax (inclusive of both travel agents and tour operators) in total over the 4 cities visited

PARTICIPATION COSTS

The cost of participation is 2400 euros per business (inclusive of a maximum of 2 representatives - at one table)

*if you would like to attend both Vakantiebeurs and the roadshow - the total cost will be 3100 euros inclusive of both shows participation.

The following is included in the participation cost of **2400 euros**:



SOUTH AFRICAN TOURISM

- all accommodation on a bed and breakfast basis for the duration of the roadshow (15 - 23 January 2024)
- 2 pax per table
- all transport between roadshow cities by bus (4 cities)
- Workshop participation costs - targeting 120 agents and tour operators per workshop
- Welcome and farewell dinner
- Light snack/dinner on workshop days

The following is excluded:

- All international flights
- Room nights before 15 January and after 22 January (check out 23 January)
 - All meals not mentioned (only breakfast has been provisioned with hotel costs, with light meal provided at workshops on workshop days)
 - Tipping, bar charges, room service
 - Hold deposit normally charged for at hotel
 - Incidentals and costs for own account

INSTRUCTIONS FOR APPLICATION (EXCLUDING DMCS - DMC APPLICATION PROCESS BELOW)

1. Submit a 300 word profile of your business highlighting:
 - a. Key experience pillar (pillars that your business falls into)
 - b. Consumer segments that your business normally appeals to
 - c. Current customer base
 - d. Current tourism network affiliations if applicable
 - e. Province in which you are based
 - f. Any additional information you deem relevant
2. Top line marketing plan to market yourself to potential trade partners in this region using the insights provided in this document - no more than 1 page. Include strategic objective, pricing strategy etc.
3. The score card for applications to be selected will reflect the following:
 - a. Diversity and uniqueness of experiences (linked to experience pillars) 30%
 - b. as well as marketing strategy compiled: 30% of score
 - c. Aligned with answering to consumer needs in the region (consumer needs highlights detailed above) - 30%
 - d. Responsible tourism opportunities highlighted (if applicable): 10%



SOUTH AFRICAN TOURISM

4. Everyone is welcome to apply - if many applications are received, preference will be given to suppliers who have not attended before

DMC APPLICATION PROCESS:

1. Please indicate the provinces in which you currently sell packages for
2. Present 2 different itineraries that could potentially be packaged incorporating the consumer insight elements detailed above. Score will be awarded for inclusivity and responsible tourism aspects reflected in the itinerary. Your 2 itineraries also need to be segmented as follows: Repeater itinerary (x1 itinerary) vs first timer itinerary (x1 itinerary). Please align both themes to consumer insights as reflected above. Further clarification as follows:
 - a. What kind of itinerary would you showcase to a first timer needing to see the classics (aligned to the consumer insights)? Please submit 1 in accordance with key experience pillars provided above
 - b. What kind of itinerary would you showcase to a repeat visitor? Please submit 1 in accordance with key experience pillars provided above

The scorecard will be reflected as follows:

1. How many provinces are reflected in existing packages (score only awarded if proof provided)? 4+ provinces = 5 (30% of total score)
2. Inclusivity reflected in itinerary? 40% or more inclusive representation = 5 (30% of total score)
3. 2 itineraries reflecting first timer vs repeater experiences aligned with consumer insights? Marketing strategy compiled for these itineraries (40% of total score)
4. The remaining 10% will be based on whether DMC is leisure focused more than business/ incentive and whether the company is South African owned.
5. Only 3 DMCs will be accepted

Please email your applications to: jordy@southafrica.net by the closing date and time.

Closing date for applications: Close of business on 22 November 2023.

Please don't hesitate to contact us should you have any questions.

Kind regards

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