

South African Tourism

**Domestic Tourism
Presentation to the Portfolio Committee on Tourism**

September 2015



DOMESTIC TOURISM

Key Challenge

Developing the economic, socio-political case for Domestic Tourism resulting in building a culture of travel among all South Africans, encouraging more frequent travel, over a broad geographic spread throughout all seasons.

DOMESTIC TOURISM

Portfolio Committee on Tourism request on key issues to be addressed:

- Strategies to inculcate a culture of travel amongst South Africans.
- Strategies to achieve geographic spread.
- Partnerships with organisations/stakeholders.
- Unpacking “Nothing’s More Fun Than A Sho’t Left”.
- Implementation of the R100 million ring-fenced funding.

BACKGROUND

- Tourism is positioned as one of the six core pillars of growth in South Africa's New Growth Path Framework.
- The National Tourism Sector Strategy (NTSS) has identified domestic tourism as a critical priority in sustaining the South African tourism industry and improving job creation.
- This mandate pertains to South African Tourism as well as NDT.
- Ring-fenced money was allocated to South African Tourism to address the issue of Domestic Tourism for the period 2015 to 2018 (R100 million 2015/16, R105 million 2016/17, R110 million 2017/18).

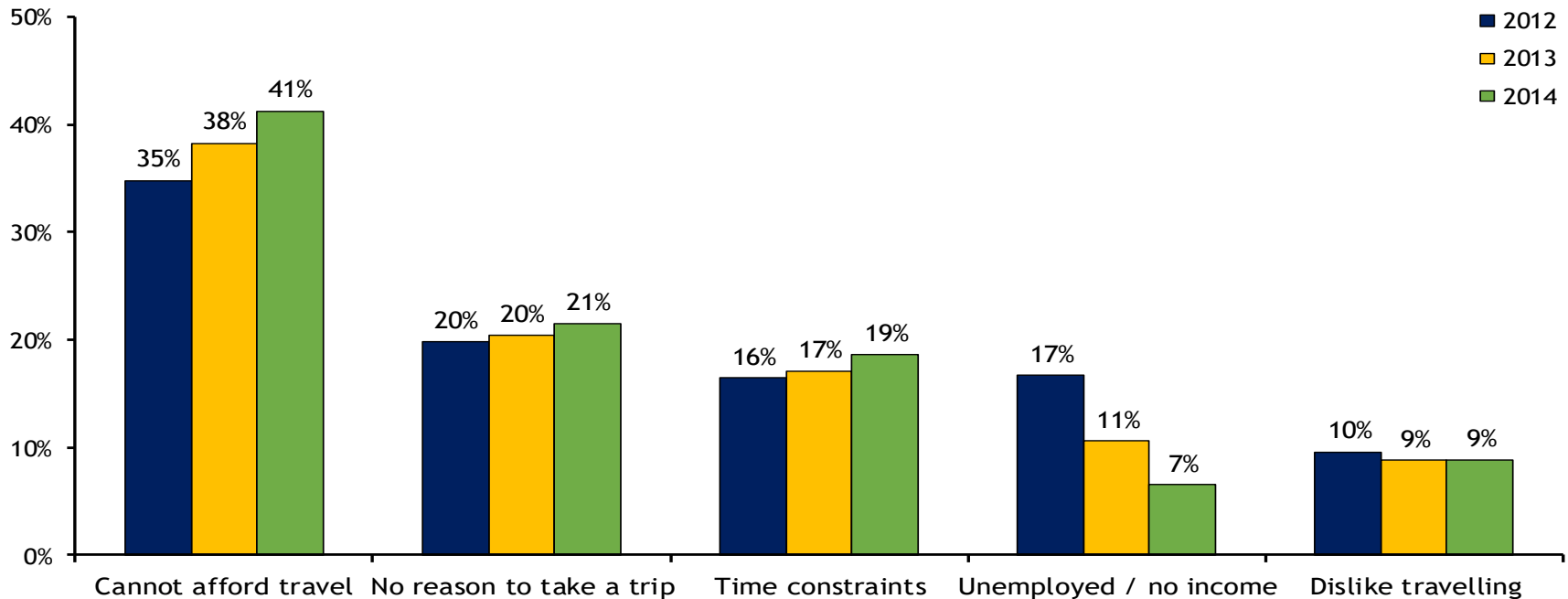
BACKGROUND

BARRIERS TO DOMESTIC TRAVEL

- Low disposable income.
- The perception of the lack of affordability of travel.
- A lack of a culture of travel due, in part, to not understanding the benefits of travel.
- The general belief in the trade that the international tourism is the more important the domestic tourism.

CORE DOMESTIC TOURISM PROBLEMS

- Top five Reasons for not taking a domestic trip over the last three years



Economic constraints remain the biggest barrier to domestic travel. This can be translated into the lack of affordability, but it can also be seen as the lack of value a travel experience can create. Approximately, 48% of the adult population cannot afford to travel and they are unemployed/ have no income.

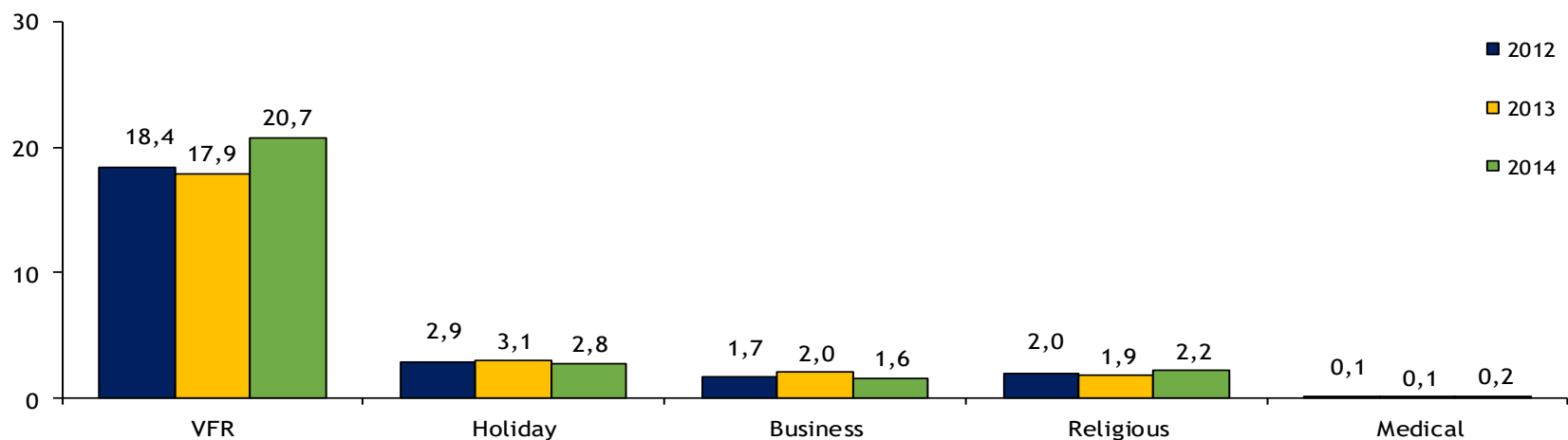
DOMESTIC PERFORMANCE OVER THE LAST FIVE YEARS

This is a synopsis of the domestic tourism performance indicators for the last five years that analyse the trends and performance of the market.

Key Metrics		2010	2011	2012	2013	2014
Domestic Travel Incidence	Annual	43%	44%	40%	35%	35%
	Monthly ¹	8%	7%	6%	6%	7%
Number of Trips	Annual	29.7 Million	26.3 Million	25.4 Million	25.2 Million	28.0 Million
	travellers	13.5 million	13.9 million	12.5 million	12.0 million	12.0 million
	Avg. Trip taken	2.4	2.1	2	2.1	2.3
	By Purpose	VFR: 74%, Holiday: 13%, Business: 5%,	VFR: 73%, Holiday: 15%, Business: 4%,	VFR: 72%, Holiday: 12%, Business: 7%,	VFR: 70%, Holiday: 12%, Business: 8%,	VFR: 73%, Holiday: 10%, Business: 6%,
Spend	Total Annual Spend	R21.1 Billion	R20.2 Billion	R21.8 Billion	R24.3 Billion	R26.8 Billion
	By Purpose	VFR: 51%, Holiday: 31%, Business: 14%	VFR: 53%, Holiday: 29%, Business: 12%	VFR: 52%, Holiday: 23%, Business: 17%	VFR: 47%, Holiday: 26%, Business: 19%	VFR: 51%, Holiday: 22%, Business: 20%
	Average Spend per Trip / per Day	R710 / Trip;	R760 / Trip;	R850 / Trip;	R980 / Trip;	R950 / Trip;
		R160 / Day	R170 / Day	R180 / Day	R210 / Day	R230 / Day
Trip Length	Total Annual Bed Nights	130.8 Million	114.8 Million	121.2 Million	111.3 Million	113.1 Million
	Average Nights per Trip	4.4	4.4	4.8	4.4	4.0

THE NUMBER OF DOMESTIC TRIPS FROM 2012-2014

- VFR remains the major reason for domestic trips and the number of domestic trips increased in 2014 compared to 2013. The number of holiday and business trips taken in 2014 decreased compared to 2013 and were even lower than 2012 levels.



% growth '13 vs '12	-2,8%	5,4%	20,6%	-7,0%	18,4%
% growth '14 vs '13	15,7%	-9,1%	-19,7%	19,7%	86,4%
CAGR '12 to '14	6,0%	-2,1%	-1,6%	5,5%	48,6%

THE DOMESTIC TOURISM STRATEGY

NTSS OBJECTIVES

- To entrench a tourism culture among all South Africans.
- To increase the number of domestic travellers to achieve the 2020 target of 18 million travellers; and growing the number of domestic trips to 54 million, while increasing the number of holiday trips to 9 million.
- To improve the domestic tourism revenue contribution to R499 billion and create 225 000 additional jobs by 2020.
- To improve seasonality and geographic spread of tourism.

HOW WILL SA TOURISM DELIVER?

“Strategies to inculcate a culture of travel amongst South Africans”

- South African Tourism have embarked on a developing new campaign “My First Time” that will be supported across all media (TV, national, regional and community radio, Out of Home) with extensive digital support, supporting Sho’t Left.
- Due for launch in October 2015.
- This campaign will run for the next three years (providing it shows results) to really drive the culture of travel among all South Africans.
- The Sho’t Left product offer will continue to support affordable trade offers.

HOW WILL SA TOURISM DELIVER?

“Partnerships with organisations and stakeholders”

- Joint Marketing Agreements are critical for the success in driving the right offer with the trade.
- Provincial and City Tourism Agencies are consistently involved via a number of planned interactions.
- High level actions will be in place to mobilise the South African population directly and indirectly.
- Media partnerships are core for effective delivery.
- Content integration will feature on a number of recognised shows, as well as importantly drive the creation of a new travel show.

HOW WILL SA TOURISM DELIVER?

“Geographic spread and seasonality”

- Media hostings will support the entire campaign, driving geographic spread and issues of seasonality.
- Public Relations will play an extensive role in building geographic spread and seasonality.
- Each story built will be aware of the issues around geographic spread and seasonality.

HOW WILL SA TOURISM DELIVER?

As agreed, this approach will ensure that the additional funding will be expended in the following two broad categories i.e. awareness and conversion:

- In 2015/16 70% of the budget will be spent on marketing activities aimed at creating awareness and culture of travel amongst South Africans whilst the remaining 30% will be spent on marketing activities that will drive conversion in the short term which will positively impact the travellers numbers and the tourism revenue.
- In 2016/17 60% of the budget will be spent on marketing activities aimed at creating awareness and culture of travel whilst the remaining 40% will be spent on marketing activities that will drive conversion in the short term.
- In 2017/18 a balanced approach with an equal 50:50 split will be used to achieve both conversion in the integrated segments as well as growing awareness in the most attractive market segments identified.

THE BRAND

SOUTH AFRICA

THE TARGET MARKET

THERE'S ALWAYS A FIRST TIME

JOB 1: THE PRIORITY AND SECONDARY SEGMENTS

INSPIRE through the inherent desire for new experiences

Tap into the human emotion of what it feels like to experience something for the first time in order to develop programs that emphasize how every Sho't Left is another opportunity to experience something new for the first time.

JOB 2: TRADE

EDUCATE, empower and partner with trade to take advantage of domestic travel potential through market insights & real-life experiences

In order to create more relevant travel packages that answer to the target markets desire for new experiences, we need to improve trade's knowledge through first-hand experiences of product offerings they are not currently aware of - trade's first time.

JOB 3: SOUTH AFRICANS WITH NO CULTURE OF TRAVEL

CREATE real-life travel experiences for South Africans to participate in

In order for people who have never travelled for leisure to understand the role travel can play in their lives, we need to provide South Africa's future travelers with the chance to literally feel what it's like to experience something for the first time.

SOUTH AFRICAN TOURISM'S PARTNERS

PARTNERS

PRODUCT

ALL offerings from Heritage Sites, SANParks, SANBI, Museums etc etc

Work on collaborative offers to drive the first timers to experience what we have to offer

PROVINCES AND MUNICIPALITIES

GALVINISE all to work on a common strategy with common strategic insights

Sharing the purpose, the strategy and the insights will create a common purpose, that can then be created collaboratively

TRAVEL PARTNERS

GETTING the traveler there

Working with SA Express, Mango, Prasa, InterCape and the transport industry to show just how easy it is to experience travel, more first timers will be encouraged

A SHARED TRUTH EXISTS BETWEEN ALL 3 KEY DOMESTIC TARGET MARKETS

KEY JOB TO BE DONE:

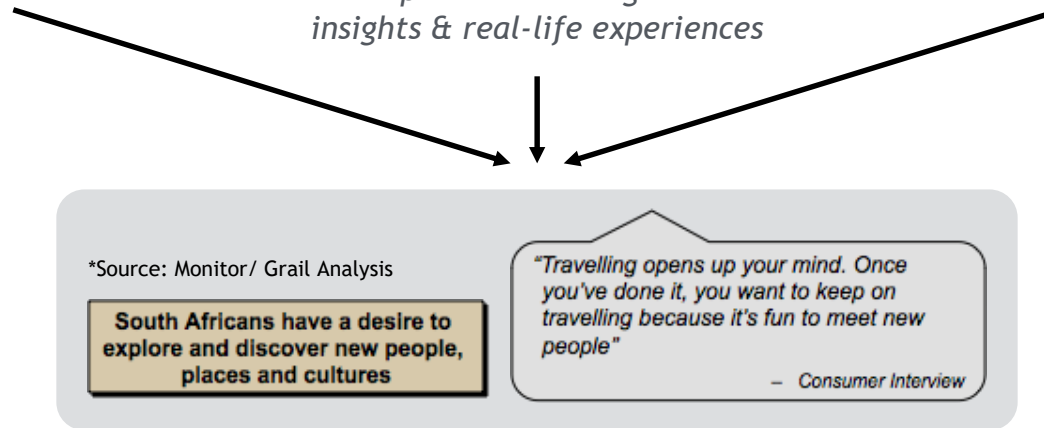
***INSPIRE** through the inherent desire for new experiences*

KEY JOB TO BE DONE:

***EDUCATE**, empower and partner with trade to take advantage of domestic travel potential through market insights & real-life experiences*

KEY JOB TO BE DONE:

***CREATE** real-life travel experiences for South Africans to participate in*



THERE'S ALWAYS A FIRST TIME

No matter how much you do or do not travel, every weekend provides a new opportunity to do something you've never done before

The feeling/emotion new experiences provide people

PROPOSED WAY FORWARD

MOVING FROM

SHO'T LEFT AS BRAND



TO

SHO'T LEFT AS CAMPAIGN

UNDER THE SOUTH AFRICA 'INSPIRING NEW WAYS' BRAND
BUILDING A MILLION NEW EXPERIENCES ARE A SHO'T LEFT AWAY

PROPOSED WAY FORWARD: USING GLOBAL AS REFERENCE



Inspiring new ways

**Overarching
Brand**

OVER-ARCHING BIG IDEA: **MEET SOUTH AFRICA**

'Meet South Africa' is our BIG IDEA which leverages South Africa's unique point of difference - our people - both locally and abroad

**Unique POD &
over-arching
Big Idea**

USA

IN-MARKET CAMPAIGN: **WHAT'S YOUR BIG 5?**

Based on in-market insights and issues, this campaign is designed to address individual market needs

BRAZIL

IN-MARKET CAMPAIGN: **ORDINARILY EXTRAORDINARY**

Based on in-market insights and issues, this campaign is designed to address individual market needs

SOUTH AFRICA

IN-MARKET CAMPAIGN: **SHO'T LEFT**

Based on in-market insights and issues, this campaign is designed to address individual market needs

**In-market
Campaign
Examples**



Inspiring new ways

THE IMPEMETATION PLAN

IMPLEMENTATION PLAN 2015/16

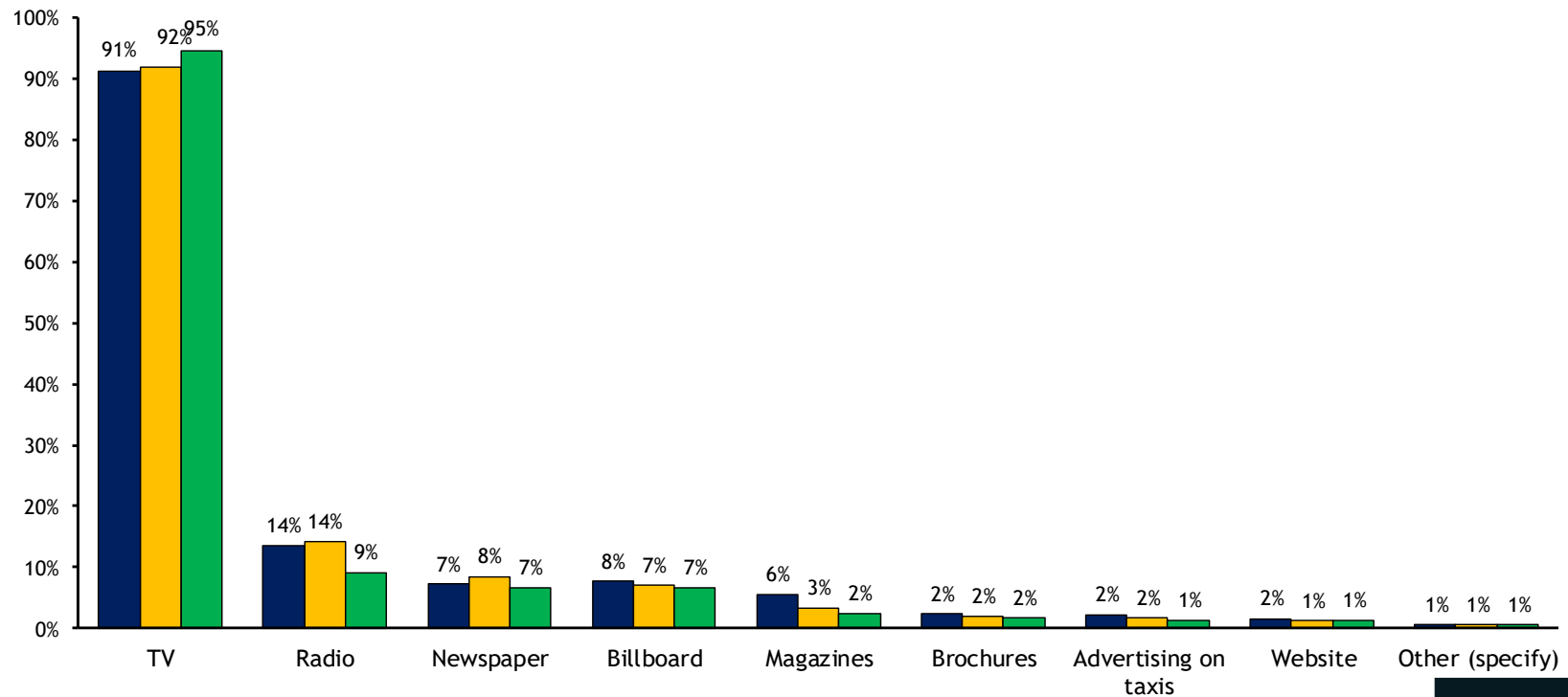
Media support “My First Time”

Television

SABC1, 2 and 3

eTV

DSTV



Media Support “My First Time”

Radio

National (Metro, Five FM)

Provincial (ECR, Kaya, Jacaranda, Thobela, Heart FM together with all SABC regional stations).

Community

Radio deployment on national, provincial and community radio stations foster a culture of travel and influence consumer behaviour within the consumer’s first language.

Media support “My First Time”

Out Of Home

Gauteng, KwaZulu-Natal, Eastern Cape

Out Of Home (OOH) marketing is highly impactful advertising that reaches the consumer while they are outside of their homes. OOH advertising is mainly focused on marketing to consumers when they are "on the go" in public places, in transit, waiting (such as bus stops), and/or in specific commercial locations (such as in a retail venues or airports).

OOH advertising formats fall into four main categories: billboards, street poles, transit, and mobile such as taxi's airplanes and buses. OOH is critical to the campaign mix in order to retain top of mind awareness, generate demand and drive conversion.

South African Tourism is working with the municipalities and provinces where possible to share costs.

IMPLEMENTATION PLAN 2015/16

Digital

www.shotleft.com

Facebook

twitter

Instagram

Pinterest

Online advertising

Digital media placement is advancing rapidly, and digital media strategies need to be fluid enough to capitalize on the best implementation technology available. Savvy online consumers quickly get used to the same advertising on their favourite websites and advert avoidance is a real threat to long term media campaigns. Hence, specific channel tools will be used to target consumers from our targeted segments to ensure maximum effective deployment which will take place across both digital and mobile platforms.

User generated content will be a key driver in the “My First Time” campaign.

IMPLEMENTATION PLAN 2015/16

Trade and other activation partners

Thompsons Tours JMA

Flightsite JMA

STA Travel JMA

Vuwa Tours JMA

Dinare Trust JMA

Mango

SAX

InterCape

Tollgate

Provincial and Municipal Tourism Organisations

Working proactively on conversion with partners is an essential tool to drive domestic tourism.

HIGH LEVEL PRACTICAL ACTIONS FOR DEMONSTRATING DOMESTIC TOURISM TO THE POPULATION

SA Tourism will directly mobilise **5373** South Africans through the following initiatives...

	PROJECT/ACTIVITY	NO OF PEOPLE
1	Ultimate Braai Master Television Show	300 Grade 7 children
2	Stories from a Sidecar Television Show	20 Adults (12 women and 8 Men)
3	South African Stories “My First Time”	53 South Africans (27 Adult Men, 18 Women 8 children)
5	Gogo’s on Tour	3000 Senior Citizens
6	School Kids Activation: Nationwide	2000 Children
		5373 People

HIGH LEVEL PRACTICAL ACTIONS FOR DEMONSTRATING DOMESTIC TOURISM TO THE POPULATION

SA Tourism through joint partnerships with trade and industry has and will mobilise **2,116,045** South Africans through the following initiatives that directly offer some form of incentive to travel.

	PROJECT/ACTIVITY	NO OF PEOPLE
1	Women's Day Activation at Hebron, North West: 9 th August 2015	1000 Women
2	Stokvel Association Expo at Walter Sisulu Square in Kilptown: 22-23 August 2015.	5000 Adults
3	InterCape Joint Partnership.	100,000 Adults
5	Tollreach Activations nationwide	1,000,000 Adults
6	Campus Activations in partnership with STA Travel	60,000 students
7	Mango In-Flight Activations	950,000 passengers
8	DJ Tours: 5 First-time travellers to all 9 provinces	45 People
	TOTAL	2,116,045 People

IMPLEMENTATION PLANS 2015 - 2018

MTEF TARGETS

- South African Tourism seeks to achieve to stabilise the declining domestic tourism market and protect the market by setting the following targets over the MTEF.

KEY PERFORMANCE INDICATOR	AUDITED OUTCOME/ ACTUAL PERFORMANCE			ESTIMATED PERFORMANCE		TARGET		FORECASTS			
	2012/13	2013/14		2014/15		2015/16		2016/17		2017/18	
Number of domestic holiday trips	2 900 000	3 100 000	6,9%	2 624 214	-15,3%	2 841 209	8,3%	3 059 764	7,7%	3 278 319	7,1%
TDDS (billion)	R 21,8	R 24,3	11,5%	R 23,2	24,3%	R 24,3	4,5%	R 25,3	4,5%	R 26,5	4,5%

MTEF BUDGET ALLOCATION

	2015/16	2016/17	2017/18
MTEF ring-fenced Allocation	R100 000 000	R105 000 000	R110 250 000
Domestic Budget (current allocation)	R 36,576,000	R 41,200,000	R 48,656,000
TOTAL	R136,576,000	R141,200,000	R148,656,000

IMPLEMENTATION PLAN 2015/2016

Activity	Quarter 1 Actual	Quarter 2 Planned	Quarter 3 Planned	Quarter4 Planned	Total 2015/16
Media	R16,6m	R14,4m	R25m	R14m	R70m
Digital	R2m	R2m	R2m	R2m	R8m
Activations	R1,6m	R9m	R5m	R2,4m	R18m
PR & Comms	R0,3m	R0,3m	R4,1m	R0,3m	R5m
Trade	R6m	R2m	R2m		R10m
Hostings/ events	R0,6m	R1m	R2,2m	R1,2m	R5m
Content integration	R1,9m	R5,9m	R0,2m	R1m	R9m
Other	R1,75m	R1,75m	R5,75m	R1,75m	R11m
Total	R30,75m	R36,35m	R46,25m	R22,65m	R136m

IMPLEMENTATION PLAN 2015/2016

- SA Tourism will be able to target the selected prioritised five segments with the current R36 million (2015/16) and with the additional R100 million allocated, we will be in a position to target all 14 segments, with overlap into the total population.
- The two main primary objectives will be to expend 70% of the budget to create awareness and entrenching a tourism culture amongst South Africans and 30% towards conversion and growing holiday trips in South Africa.

STRATEGIC OBJECTIVE	KEY PERFORMANCE INDICATOR	MEASUREMENT TARGET: 2015/16	TARGET SEGMENT	ACTION AND PROJECTS	BUDGET ALLOCATED
Increase Domestic Tourism in South Africa					2015/6
	Grow the number of Holiday Trips	Achieve annual target of 2.8 m holiday trips which is a 8.3% growth on 2014/15 actual.	Target Five Segments	Drive conversion by securing key joint marketing agreements with established and small tourism businesses. Improving job creation. Expand our reach and partner with online tour operators (OTA's like SafariNow) and secure joint marketing agreements encouraging conversion. These partnerships must focus of specials in price range of affordable like under R1000 special deal for a weekend using relevant outdoor channels like street advert poles in townships, taxi ranks, airports and highways etc.	R3.5 m(current) R2.5m (additional)
Entrench a tourism culture among South Africans	Build a Culture of Embracing Tourism amongst South Africans	Achieve annual target of 2.8m holiday trips	Target 3 Segments	Use media platforms that will create inspiration to start building a culture of travel simultaneously inspiring current travellers to take additional trips (media buys are costly).Content integration plan for Muvangho tv soapie. Produce a series of #My1st local stories for both above the line and below the line media platforms. Collaborative provincial partnership plan that details how we enhance and support provincial activities that aligns to the national domestic tourism campaign. Partner with the national Stokvel Association and jointly reach all ordinary South Africans through affiliated Stokvel groups across all provinces including rural townships. This gives us the opportunity to address this captive audience to educate and instil a sense of travel amongst them. Roll-out as part of the DJ Tours Project to include radio activations with specific national & regional radio stations like Metro FM, Ukhozi FM, iKwekwezi, Thobela FM, Kaya FM, Cape Talk FM etc. in collaboration with provinces promoting alignment and first time travel. Collaborate with all provinces to highlight their hidden gems and jointly promote the Madiba Pilgrimage Route and other iconic heritage attractions nationally. Roll out schools program, campus activations, Travel Industrial Schools Play, Childrens Travel Book with PUO Books and Spelling Bee Competition creating awareness of travel and the benefits.	R20 m (current) R94 m (additional)

STRATEGIC OBJECTIVE	KEY PERFORMANCE INDICATOR	MEASUREMENT TARGET: 2015/16	TARGET SEGMENT	ACTION AND PROJECTS	BUDGET ALLOCATED
Increase tourism revenue contribution to the economy	Total Domestic Direct Spend (TDDS)	Achieve annual spend target of R24.3 billion which is a 4.5% increase on 2014/15 estimate (R23.2 billion).	Target 5 segments	Drive conversion with all trade partners showing them the profitability of selling domestic travel (Use SATSA members). Increase our reach to corporates and loyalty clubs i.e. Edgars, Avios & Discovery Vitality are loyalty clubs that have a propensity to convert to a large consumer base of ordinary South Africans encouraging a culture of travel. Collaborate with InterCape targeting South Africans who travel fro VFR to convert them to leisure.	R4.5 m(current) R1.5 m(additional)
Enhance efforts aimed at addressing seasonality and equitable geographical spread	Increase geographic spread		Target 5 segments with spill over into remaining 9	Engage in non-traditional partnerships using events as a key catalyst in the even distribution of tourism, e.g. iRock Limpopo, Cape Town International Jazz Festival, Macufe Festival, Joy of Jazz, Nelson Mandela Golf Invitational, Heritage Festival, Oppie Koppie etc. Partner with at least one event per Province. Sign at least one Joint Marketing Agreement with a partner in each Province to address low season. All joint marketing agreements secured to have a 360 approach focussing on hidden gems in less visited provinces. Special deal-driven packaged deals using partners that have access to mass segments, Computicket at Checkers. Also using the Stokvel Association to push these special travel deals. Activate partnership with Gogo's on Tour.	R4 million (current) R1.5 million (additional)
	Address Seasonality	Decrease seasonality Increase in share of bed nights spent in the low season months	Target 5 segments	Roll-out deal driven tactical campaigns with trade partners that are specifically designed to address the low season from May to September as well as using key events, e.g. Tourism Month campaign. Use our iconic heritage sites to incite free entry to attractions encouraging day trips domestically, e.g. SANParks, Table Mountain Cableway, Maropeng and Robben Island etc. Also ensure that all marketing activity extends throughout the year and not just in peak season.	R4.5 m R500K (additional)
				SUB TOTALS	R36 m (2015/16)
				TOTAL	R100 m (additional) R136 m

IMPLEMENTATION PLAN 2016/2017

- SA Tourism will be able to target the selected prioritized five segments with the current R36.2 million (2016/17) and with the additional R105 million allocated, we will be in a position to target a total of nine segments.
- The two main primary objectives will be to expend 60% of the budget to create awareness and entrenching a tourism culture amongst South Africans and 40% towards conversion and growing holiday trips in South Africa.

STRATEGIC OBJECTIVE	KEY PERFORMANCE INDICATOR	MEASUREMENT TARGET: 2016/17	TARGET SEGMENT	ACTION AND PROJECTS	BUDGET ALLOCATED
Increase Domestic Tourism in South Africa					2016/17
	Grow the number of Holiday Trips	Achieve annual target of 3m holiday trips which is a 7.7% growth on 2015/16 target.	Target 5 segments	<p>Drive conversion by securing key joint marketing agreements with established and small tourism businesses. Improving job creation.</p> <p>Expand our reach and partner with online tour operators (OTA's like Travel Ground and SafariNow) and secure joint marketing agreements encouraging conversion. The trade partnerships must focus on specials in price range of affordable like under R1000 special deal for a weekend using relevant outdoor channels like street advert poles in townships, taxi ranks, airports and highways etc.</p>	<p>R3.5 m (current)</p> <p>R8 m (additional)</p>
Entrench a tourism culture among South Africans	Build a culture of travel of embracing tourism among South Africans	Achieve annual target of 4.3 m holiday trips which is a 30.3% growth on 2015/16 target (3.3 million).	Target 6 segments	<p>Deploy the local SA stories on above the line media platforms, television being the most consumed medium.</p> <p>Create provincial partnership plan that details regional media buys enhancing national domestic tourism campaign to lobby alignment and support.</p> <p>Partner with the national Stokvel Association and jointly reach all ordinary South Africans through affiliated Stokvel groups across all provinces including rural townships. This gives us the opportunity to address this captive audience to educate and instil a sense of travel amongst them.</p> <p>Roll-out as part of the DJ Tours Framework to include radio activations with specific national & regional radio stations like Metro FM, Ukhozi FM, East Coast, Kaya FM, Heart FM etc. in collaboration with provinces promoting alignment. Collaborate with all provinces to highlight their hidden gems and jointly promote the Madiba Pilgrimage Route and other iconic heritage attractions nationally.</p>	<p>R1.5m (current)</p> <p>R82 m (additional)</p>

STRATEGIC OBJECTIVE	KEY PERFORMANCE INDICATOR	MEASUREMENT TARGET: 2016/17	TARGET SEGMENT	ACTION AND PROJECTS	BUDGET ALLOCATED
Increase tourism revenue contribution to the economy	Amount of revenue	Achieve annual spend target of R24.6b, which is a 20% growth on 2015/16 target (R20.5 billion).	Target 5 segments	<p>Drive conversion with all trade partners showing them the profitability of selling domestic travel (use SATSA members).</p> <p>Increase our reach to corporates and loyalty clubs i.e. Edgars Club & Discovery Vitality are loyalty clubs that have a propensity to convert to a large consumer base of ordinary South Africans encouraging a culture of travel.</p>	R4 m R5 m (additional)
Enhance efforts aimed at addressing seasonality and equitable geographical spread	Increase geographic spread		Target 5 segments	<p>Engage in non-traditional partnerships using events as a key catalyst in the even distribution of tourism, e.g. iRock Limpopo, Cape Town International Jazz Festival, Macufe Festival, Joy of Jazz, Nelson Mandela Golf Invitational, Heritage Festival etc.</p> <p>All joint marketing agreements secured to have a 360 approach focussing on hidden gems in less visited provinces. Special deal-driven packaged deals using partners that have access to mass segments, Computicket at Checkers. Also using the Stokvel Association to push these special travel deals.</p>	R5 m R5 m (additional)
	Address Seasonality	Decrease seasonality Increase in share of bed nights spent in the low season months	Target 5 segments	<p>Roll-out deal driven tactical campaigns with trade partners that are specifically designed to address the low season from May to September as well as using key events, e.g. Tourism Month campaign. Use our iconic heritage sites to incite free entry to attractions encouraging day trips domestically, e.g. SANParks, Table Mountain Cableway, Maropeng etc. Also ensure that all marketing activity extends throughout the year and not just in peak season.</p>	R3.5 m R5 m (additional)
				SUB TOTALS	R36.2 m (2016/17)
				TOTAL	R105 m (additional) R141.2 m

IMPLEMENTATION PLAN 2017/2018

- SA Tourism will be able to target the selected prioritized five segments with the current R38.4million (2017/18) and with the additional R110.25 million allocated, we will be in a position to target a total of eight segments, but there will be overlap into other segments.
- The two main primary objectives will be expend 50% of the budget towards awareness of entrenching a tourism culture amongst South Africans and 50% towards conversion and growing holiday trips in South Africa.

STRATEGIC OBJECTIVE	KEY PERFORMANCE INDICATOR	MEASUREMENT TARGET: 2017/18	TARGET SEGMENT	ACTION AND PROJECTS	BUDGET ALLOCATED
Increase Domestic Tourism in South Africa					2017/18
	Grow the number of Holiday Trips	Achieve annual target of 4.6m holiday trips which is a 7% growth on 2016/17 target (4.3 million).	Target 5 segments	<p>Drive conversion by securing key joint marketing agreements with established and small tourism businesses. Improving job creation.</p> <p>Expand our reach and partner with online tour operators (OTA's like Travel Start, Travel Ground and Safari Now) and secure joint marketing agreements encouraging conversion. These partnerships must focus of specials in price range of affordable like under R1000 special deal for a weekend using relevant outdoor channels like street advert poles in townships, taxi ranks, airports and highways etc.</p>	<p>R3.5 m (current)</p> <p>R15 m (additional)</p>
Entrench a tourism culture among South Africans	Build a culture of embracing tourism amongst South Africans	Achieve annual target of 4.6m holiday trips which is a 7% growth on 2016/17 target (4.3 million).	Target 2 segments	<p>Create provincial partnership plan that details regional media buys enhancing national domestic tourism campaign to lobby alignment and support.</p> <p>Partner with the national Stokvel Association and jointly reach all ordinary South Africans through affiliated Stokvel groups across all provinces including rural townships. This gives us the opportunity to address this captive audience to educate and instil a sense of travel amongst them.</p> <p>Roll-out as part of the DJ Tours Project to include radio activations with specific national & regional radio stations like Metro FM, Kagasi FM, Ukhozi FM, iKwekwezi, KFMetc. in collaboration with provinces promoting alignment. Collaborate with all provinces to highlight their hidden gems and jointly promote the Madiba Pilgrimage Route and other iconic heritage attractions nationally.</p>	<p>R1.5m (current)</p> <p>R57 m (additional)</p>

STRATEGIC OBJECTIVE	KEY PERFORMANCE INDICATOR	MEASUREMENT TARGET: 2017/18	TARGET SEGMENT	ACTION AND PROJECTS	BUDGET ALLOCATED
Increase tourism revenue contribution to the economy	Amount of revenue	Achieve annual spend target of R26.1 b, which is a 6.1% growth on 2016/17target (R24.6 billion).	Target 5 segments	<p>Drive conversion with all trade partners showing them the profitability of selling domestic travel (Use SATSA & FEDHASA members).</p> <p>Increase our reach to corporates and loyalty clubs i.e. Edgars, Smart Shopper Clubs & Discovery Vitality are loyalty clubs that have a propensity to convert to a large consumer base of ordinary South Africans encouraging a culture of travel.</p>	<p>R4 m</p> <p>R18 m</p> <p>(additional)</p>
Enhance efforts aimed at addressing seasonality and equitable geographical spread	Increase geographic spread		Target 5 segments	<p>Engage in non-traditional partnerships using events as a key catalyst in the even distribution of tourism, e.g. iRock Limpopo, Cape Town International Jazz Festival, Macufe Festival, Joy of Jazz, Nelson Mandela Golf Invitational, Heritage Festival etc.</p> <p>All joint marketing agreements secured to have a 360 approach focussing on hidden gems in less visited provinces. Special deal-driven packaged deals using partners that have access to mass segments, Computicket at Checkers. Also using the Stokvel Association to push these special travel deals.</p>	<p>R5 m</p> <p>R10 million</p> <p>(additional)</p>
	Address Seasonality	<p>Decrease seasonality</p> <p>Increase in share of bed nights spent in the low season months</p>	Target 5 segments	Roll-out deal driven tactical campaigns with trade partners that are specifically designed to address the low season from May to September as well as using key events, e.g. Tourism Month campaign. Use our iconic heritage sites to incite free entry to attractions encouraging day trips domestically, e.g. SANParks, Table Mountain Cableway, Maropeng etc. Also ensure that all marketing activity extends throughout the year and not just in peak season.	<p>R3.5 m</p> <p>R10.25 m</p> <p>(additional)</p>
				SUB TOTAL	<p>R 38.4 m</p> <p>(2017/18)</p> <p>R110.25 m</p> <p>(additional)</p>
				TOTAL	R148.65 m

THANK YOU