SA Tourism is the tourism marketing organisation of South Africa

South African Tourism is the official tourism marketing organisation of South Africa. We market across the world focusing on three groups of travellers: international leisure travellers, the domestic and regional traveller, and business tourism travellers who travel to South Africa for meetings, conferences, exhibitions and incentives. A key part of our business is to:

- Understand the market
- Choose the attractive segments
- Market the Destination

This booklet is the result of research South African Tourism did in 2006/7 and is to help market South Africa as a Business Tourism Destination. The project's aim was to understand the whole of the market and not the section we are currently seeing. Against this research, the head office Business Tourism staff and our country offices have developed activation plans for our focus areas. These plans are available from our offices (see addresses at the back).

Current information on arrivals to South Africa are available on our website www.southafrica.net/research and www.southafrica.net/trade
Goals and aspirations:
The Business Tourism Growth Strategy addresses critical questions

- What are our goals and aspirations?
- Where will we play?
- How will we win in chosen markets?
- What capabilities must be in place to win?

- What are the broader goals of tourism?
- What role does SAT play in the tourism value chain and how could Business Tourism achieve these goals?
- What parts of Business Tourism marker should SAT focus on and in which regions?
- What does SAT need to target for growth?
- What does SAT need to defend its share in?
- What are the marketing, facilitation, product and channel levers that must be addressed for growth to take place?
- What implications does this have for SAT’s capability set?
- Who are we up against?

What management systems are required?
Goals and aspirations:

**Government has set a clear agenda for tourism, highlighting six key objectives**

A further goal has been set for business tourism to be in the top 10 global conference destinations by 2010

<table>
<thead>
<tr>
<th><strong>The Tourism Act’s mandate to SA Tourism is ...</strong></th>
<th><strong>Sustainable GDP Growth</strong></th>
<th><strong>Sustainable job creation</strong></th>
<th><strong>Redistribution and transformation</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>... through six key objectives</strong></td>
<td><strong>Increase in tourist volume</strong></td>
<td><strong>Increase in tourist spend</strong></td>
<td><strong>Increase length of stay</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Improve geographic spread</strong></td>
<td><strong>Improve seasonality patterns</strong></td>
<td><strong>Promote transformation</strong></td>
</tr>
<tr>
<td><strong>... by acting in a focused way to...</strong></td>
<td><strong>Understand the market</strong></td>
<td><strong>Choose the attractive segments</strong></td>
<td><strong>Market the Destination</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Facilitate the removal of obstacles</strong></td>
<td><strong>Facilitate the product platform</strong></td>
<td><strong>Monitor and learn from tourist experience</strong></td>
</tr>
</tbody>
</table>
**Goals and aspirations:**

**Business Tourism meets many of these high-level goals of SAT**

<table>
<thead>
<tr>
<th>Category</th>
<th>Status</th>
<th>Details</th>
</tr>
</thead>
</table>
| Volume                    | ✓        | - Business tourism is not a large market in comparison to the leisure market  
|                           |          | - However, there is **strong growth** in the market in South Africa                                                                   |
| Spend                     | x/✓      | - Business tourists are not attractive on a total spend basis when compared to other categories of travellers, but **on a spend per day level they perform well**  
|                           |          | - In absolute terms, spend by business tourists has shown significant fluctuation in the last few years                                   |
| Length of Stay            | x        | - The length of stay of business tourists is in general **shorter than for other visitor types**                                           
|                           |          | - However there is an opportunity to increase length of stay by encouraging pre-and post-tours to extend length of stay                   |
| Distribution by Province  | x/✓      | - Business tourists are less likely than leisure travellers to move around the country                                                     
|                           |          | - However, a coordinating body could ensure more equitable spread of events, especially with facilities opening in Bloemfontein and elsewhere |
| Distribution by Season    | ✓        | - The **meetings market** in particular is attractive from a seasonal distribution perspective, since there is an **opportunity to influence time of arrival** by targeting meetings that are scheduled for off-peak periods |
| Transformation            | ✓        | - **Business Tourism Associations** are actively promoting transformation principles and **encouraging members to meet regulations**           
|                           |          | - The business tourism sector provides an excellent opportunity for previously disadvantaged enterprises to play a role in the **provision of services to them across the value chain** |
Goals and aspirations:
A clear set of choices has been made to meet these objectives

- To help meet the 6 key goals of SAT
  - Increase in tourist volume
  - Increase in tourist spend
  - Increase length of stay
  - Improve geographic spread
  - Improve seasonality patterns
  - Promote transformation
- To be amongst the top ten global conference destinations by 2010

Concentrate on the association and IGO meetings markets
- Medium and Large Association Meetings
- Medium and Large IGO’s
- Aim to host one large International head-of-state meeting every three years
- We have identified actual targets
- Use regional tourism offices to target corporations based in their areas
- De-prioritise exhibitions until more data is available
- Use incentives as a way to draw in corporate meetings

Use and develop existing consumer understanding
- Share this information with trade
- Regularly conduct competitor research to revise choices and develop differentiated messaging
- Use prioritisation matrices to target most promising leads in the association and IGO markets
- Use the World Cup as a lever to raise South Africa’s world ranking
  - However, be careful to manage capacity around 2010 to prevent a major fall-off in the following years

Greater co-operation between government and industry
- Consider industry advisory board for SAT
- Ambassador programs to raise the profile of South African in target associations
- Bid support fund to cover costs of local organising committees
- Definition of standards and establishment of accreditation scheme through trade associations
- Clearly defined metrics and implementation plans

Contributing to Tourism’s 6 key objectives is certainly achievable
However, attaining Top 10 conference destination status by 2010 will be a significant challenge
Executive Summary
Where to Play

Meetings remain the most attractive segment of the Business Tourism landscape

- A global picture of the exhibitions market is not available. However, exhibitions appear to be largely dominated by domestic visitors
- Incentive travellers make up a small proportion of arrivals and behave more like leisure tourists
  - It will be important to collect data around the number of international arrivals for exhibitions and incentives in order to track their importance over time. Future where to play choices may change as more detailed data is collected
- Meetings is the largest segment by volume and value and contributes towards our goals, particularly improving seasonality

Within the Meetings segment, Large and Medium Association Meetings and Inter-Governmental Meetings are where SAT should focus its resources

- Although the largest segment of the Meetings market, corporate meetings are typically small, subject to economic conditions, have a short lead time and are predominantly local or regional in nature. This market should be tackled by Provincial tourism authorities approaching multi-nationals with headquarters/regional headquarters in South Africa and by SAT through incentive trips
- SAT should focus on all three segments of the IGO meeting market - Large Inter-Governmental Summit Meetings (e.g. WSSD, HIV/AIDS, WCAR), International Inter-Governmental Fora (e.g. WTO, WEF, UNDP) and Regional and Continental Inter-Governmental Meetings (e.g. SADC, NEPAD, AU)
  - Despite the high costs associated, SAT should aim to host at least one large summit meeting every three years for reasons of prestige and stature
  - SAT should ensure that meetings targeted fit with South Africa’s brand
- Association meetings are the second largest segment, providing stable revenue (planned 3+ years in advance and are required by association constitutions) and are more likely to result in pre- and post-tours than corporate meetings
  - Medium and large meetings (>250 delegates) are the most attractive types in terms of spend, duration, cost to acquire and number of participants
Executive Summary

How to Win

There are four areas where we can make a significant intervention in “How to Win”

- We can target more effectively using consumer understanding gained in 2001
  - This research may require updating, although much of it remains valid
- This insight can be shared with industry to help in the preparation of bid materials

- Ongoing competitor research will help revise choices around where to play and how to win
- Understanding competitor messaging will also help to develop differentiated messaging

- Through developing and maintaining local contact databases and using these to target priority associations and IGOs, SA Tourism will significantly boost its return on investment

- SA Tourism can provide a link between industry and local organising committees to maximise the meetings gained off the back of the World Cup
  - This will help in South Africa’s goal to reach the top 10 meetings destination in 2010
- However, they will also need to manage the pipeline around 2010 to prevent a post-World Cup slump in meetings
Context:
Globally, the traditional business tourism markets are large and attractive

Global Tourism Outbound 2005

- Exhibitions: N/A
- Incentives: 4
- Association / Government Meetings: 7
- Corporate Meetings: 25
- Long-Haul Leisure: 105

Global Tourism Market Size 2005

- Exhibitions: N/A
- Incentives: 58.9 (9.8)
- Association / Government Meetings: 94.9 (15.8)
- Corporate Meetings: 452.1 (75.0)
- Long-Haul Leisure: (144) 863

Note: See Appendix for methodology. Corporate meetings, average 127 participants, 197,000 meetings annually

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Context:

But business tourism arrivals are relatively small to South Africa


<table>
<thead>
<tr>
<th></th>
<th>2002</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Short-Haul/land</strong></td>
<td>4,707</td>
<td>5,412</td>
</tr>
<tr>
<td><strong>Long-Haul</strong></td>
<td>1,650</td>
<td>1,725</td>
</tr>
<tr>
<td><strong>Total Arrivals</strong></td>
<td>6,357</td>
<td>7,136</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2002</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Tourists</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2002</strong></td>
<td><strong>2005</strong></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>80</td>
<td>290</td>
</tr>
<tr>
<td>Short-Haul</td>
<td>289</td>
<td>404</td>
</tr>
<tr>
<td>Long-Haul</td>
<td>115</td>
<td>370</td>
</tr>
<tr>
<td><strong>Traders</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2002</strong></td>
<td><strong>2005</strong></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>360</td>
<td>826</td>
</tr>
<tr>
<td>Short-Haul</td>
<td>363</td>
<td>829</td>
</tr>
<tr>
<td>Long-Haul</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td><strong>Personal Shoppers</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2002</strong></td>
<td><strong>2005</strong></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>569</td>
<td>945</td>
</tr>
<tr>
<td>Short-Haul</td>
<td>579</td>
<td>948</td>
</tr>
<tr>
<td>Long-Haul</td>
<td>10</td>
<td>3</td>
</tr>
<tr>
<td><strong>Medical Tourists</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2002</strong></td>
<td><strong>2005</strong></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>279</td>
<td>288</td>
</tr>
<tr>
<td>Short-Haul</td>
<td>286</td>
<td>288</td>
</tr>
<tr>
<td>Long-Haul</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td><strong>Leisure Tourists</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2002</strong></td>
<td><strong>2005</strong></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>1,179</td>
<td>2,349</td>
</tr>
<tr>
<td>Short-Haul</td>
<td>1,247</td>
<td>2,513</td>
</tr>
<tr>
<td>Long-Haul</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

Source: South African Tourism Departure Surveys 2002–2005
Context:
Arrivals have shown strong growth, particularly in the long-haul market.

Business Tourism Arrivals in South Africa

<table>
<thead>
<tr>
<th>Year</th>
<th>Short-Haul and Land</th>
<th>Long-Haul</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>290</td>
<td>80</td>
<td>370</td>
</tr>
<tr>
<td>2003</td>
<td>233</td>
<td>122</td>
<td>355</td>
</tr>
<tr>
<td>2004</td>
<td>249</td>
<td>124</td>
<td>373</td>
</tr>
<tr>
<td>2005</td>
<td>289</td>
<td>115</td>
<td>404</td>
</tr>
</tbody>
</table>

Total Arrivals in South Africa

<table>
<thead>
<tr>
<th>Year</th>
<th>Total</th>
<th>Short-Haul and Land</th>
<th>Long-Haul</th>
<th>CAGR 02–05</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>6,357</td>
<td>4,707</td>
<td>1,650</td>
<td>3.9%</td>
</tr>
<tr>
<td>2003</td>
<td>6,301</td>
<td>4,673</td>
<td>1,628</td>
<td>4.8%</td>
</tr>
<tr>
<td>2004</td>
<td>6,458</td>
<td>4,795</td>
<td>1,662</td>
<td>1.5%</td>
</tr>
<tr>
<td>2005</td>
<td>7,136</td>
<td>5,412</td>
<td>1,725</td>
<td>3.0%</td>
</tr>
</tbody>
</table>

Source: South African Tourism Departure Surveys 2002–2005
Context:
Growth in spend has been variable over time

South African Business Tourism Spend

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Spend</th>
<th>CAGR 02–05</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>37.8 (3.7)</td>
<td>13.3%</td>
</tr>
<tr>
<td>2003</td>
<td>49.0 (6.5)</td>
<td>27.4%</td>
</tr>
<tr>
<td>2004</td>
<td>43.2 (7.1)</td>
<td>-6.9%</td>
</tr>
<tr>
<td>2005</td>
<td>54.9 (9.2)</td>
<td></td>
</tr>
</tbody>
</table>

Total Spend in South Africa

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Spend</th>
<th>Short-Haul and Land</th>
<th>Long-Haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>37.8 (3.7)</td>
<td>19.4 (1.9)</td>
<td>18.4 (1.8)</td>
</tr>
<tr>
<td>2003</td>
<td>49.0 (6.5)</td>
<td>31.6 (4.2)</td>
<td>17.4 (2.3)</td>
</tr>
<tr>
<td>2004</td>
<td>43.2 (7.1)</td>
<td>28.9 (4.7)</td>
<td>14.3 (2.3)</td>
</tr>
<tr>
<td>2005</td>
<td>54.9 (9.2)</td>
<td>40.0 (6.7)</td>
<td>14.9 (2.5)</td>
</tr>
</tbody>
</table>

Note: Total Spend Attractiveness to South Africa is determined from respondents reported spend in SA, less capital expenditure and ‘other’ spend
Source: South African Tourism Departure Surveys 2002–2005

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Context:
On a spend per day and length of stay, business tourists are attractive.

Total Spend Attractiveness per Day in South Africa, 2002–2005

Note: Total Spend Attractiveness to South Africa is determined from respondents reported spend in SA, less capital expenditure and ‘other’ spend.
Exchange rates are calculated as the year average spots on 1st January and 31st December.
Source: South African Tourism Departure Surveys 2003–2005
Context:
But the length of stay is shorter than that of a leisure traveler

These results may be being skewed by the large number of arrivals for corporate meetings from neighbouring countries

Length of Stay, 2002–2005

- **Long-Haul Leisure**
  - Number of Nights (Mode): 16.6
  - 2002: 14
  - 2003: 14
  - 2004: 14

- **Business — Professional**
  - Number of Nights (Mode): 10.4
  - 2002: 2
  - 2003: 3
  - 2004: 2

- **Business — Tourism**
  - Number of Nights (Mode): 6.4
  - 2002: 2
  - 2003: 3
  - 2004: 2

- **Average Conference Length**
  - Number of Nights (Mode): 5
  - 2002: 5
  - 2003: 5
  - 2004: 5
  - 2005: 4

* ICCA Customized SA Report, Monitor Analysis
* Source: South African Tourism Departure Surveys 2003–2005

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**Context:**
SADC visitors predominantly visit Gauteng and the province nearest to them, whereas overseas visitors are more widely spread.

### Provinces Visited by Business Tourists, by Country of Origin, 2005

(frequency of visit per 100 tourists)

<table>
<thead>
<tr>
<th>Prov. Visited</th>
<th>Lesotho</th>
<th>Swaziland</th>
<th>Mozambique</th>
<th>Botswana</th>
<th>Zimbabwe</th>
<th>Zambia</th>
<th>Namibia</th>
<th>Malawi</th>
<th>Nigeria</th>
<th>Kenya</th>
<th>UK</th>
<th>USA</th>
<th>Germany</th>
<th>RoW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gauteng</td>
<td>56</td>
<td>87</td>
<td>54</td>
<td>53</td>
<td>73</td>
<td>78</td>
<td>67</td>
<td>88</td>
<td>75</td>
<td>83</td>
<td>63</td>
<td>57</td>
<td>47</td>
<td>69</td>
</tr>
<tr>
<td>Western Cape</td>
<td>9</td>
<td>1</td>
<td>6</td>
<td>6</td>
<td>10</td>
<td>6</td>
<td>22</td>
<td>9</td>
<td>26</td>
<td>12</td>
<td>35</td>
<td>44</td>
<td>38</td>
<td>30</td>
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<tr>
<td>Eastern Cape</td>
<td>7</td>
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<td>0</td>
<td>0</td>
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<td>11</td>
<td>-</td>
<td>-</td>
<td>1</td>
<td>1</td>
<td>5</td>
<td>11</td>
<td>17</td>
<td>7</td>
</tr>
<tr>
<td>KwaZulu Natal</td>
<td>11</td>
<td>10</td>
<td>11</td>
<td>15</td>
<td>10</td>
<td>13</td>
<td>7</td>
<td>12</td>
<td>14</td>
<td>15</td>
<td>18</td>
<td>21</td>
<td>28</td>
<td>21</td>
</tr>
<tr>
<td>Mpumalanga</td>
<td>1</td>
<td>6</td>
<td>38</td>
<td>4</td>
<td>0</td>
<td>10</td>
<td>2</td>
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<td>1</td>
<td>7</td>
<td>21</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Limpopo</td>
<td>1</td>
<td>-</td>
<td>2</td>
<td>-</td>
<td>22</td>
<td>4</td>
<td>2</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>3</td>
<td>5</td>
<td>-</td>
<td>2</td>
</tr>
<tr>
<td>North West</td>
<td>7</td>
<td>1</td>
<td>2</td>
<td>18</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>5</td>
<td>4</td>
<td>9</td>
<td>11</td>
<td>8</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Northern Cape</td>
<td>3</td>
<td>-</td>
<td>2</td>
<td>6</td>
<td>0</td>
<td>-</td>
<td>7</td>
<td>-</td>
<td>-</td>
<td>1</td>
<td>5</td>
<td>3</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Free State</td>
<td>9</td>
<td>0</td>
<td>5</td>
<td>3</td>
<td>6</td>
<td>13</td>
<td>4</td>
<td>10</td>
<td>-</td>
<td>2</td>
<td>2</td>
<td>7</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

| Tourists      | 92,273  | 52,609    | 32,064     | 28,512   | 21,289   | 13,944 | 12,529  | 11,590 | 6,882   | 6,364 | 14,448 | 13,715 | 9,872  | 80,820 |
| Responses     | 96,006  | 55,350    | 38,842     | 29,970   | 26,518   | 18,985 | 15,321  | 8,240  | 7,881   | 21,624 | 23,674 | 15,372 | 121,763 |

Note: Responses: Total number of visits to a province indicated by traveler
Source: South African Tourism Departure Survey 2005, Monitor Analysis
Context:

Seasonality is less severe than in leisure tourism but still a factor

Potential exists to use business tourism arrivals to fill some of the low-season troughs of Leisure Tourism, as appears to be happening

Arrivals by Month 2003–2005

Arrivals by Month Indexed to Average Monthly Arrivals

Context:
In this project, we have focused on international business tourism market.

There is a large and very lucrative domestic market which is the responsibility of the regional and local tourism authorities to target and develop.

**Business Tourism**
*(A trip which is undertaken with the purpose of attending a conference, meeting, exhibition, event or as part of an incentive)*

**Domestic Business Tourism**
- Conferences, meetings, exhibitions, events or incentives with a purely domestic audience
  - Exhibitions with a purely domestic audience
  - Local government meetings
  - South African Associations meetings
  - Local corporate meetings / off sites
- A large and lucrative market that should not be neglected

**Global Business Tourism**
- Conferences, meetings, exhibitions, events or incentives with an international audience
  - Regional / global exhibitions
  - Inter-governmental meetings at regional or global level
  - Regional/global association meetings
  - Corporate meetings involving participants from more than one country
  - Incentive trips for employees from outside South Africa
- Highly competitive global industry

Responsibility of provincial and local tourism authorities to target and develop

Not the focus of this project

Within the scope of SAT’s Business Tourism Unit

Focus of this project
Executive Summary
Where to Play

Meetings remain the most attractive segment of the Business Tourism landscape

- A global picture of the exhibitions market is not available. However, exhibitions appear to be largely dominated by domestic visitors
- Incentive travellers make up a small proportion of arrivals and behave more like leisure tourists
  - It will be important to collect data around the number of international arrivals for exhibitions and incentives in order to track their importance over time. Future where to play choices may change as more detailed data is collected
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- SAT should focus on all three segments of the IGO meeting market - Large Inter-Governmental Summit Meetings (e.g. WSSD, HIV/AIDS, WCAR), International Inter-Governmental Fora (e.g. WTO, WEF, UNDP) and Regional and Continental Inter-Governmental Meetings (e.g. SADC, NEPAD, AU)
  - Despite the high costs associated, SAT should aim to host at least one large summit meeting every three years for reasons of prestige and stature
  - SAT should ensure that meetings targeted fit with South Africa’s brand
- Association meetings are the second largest segment, providing stable revenue (planned 3+ years in advance and are required by association constitutions) and are more likely to result in pre- and post-tours than corporate meetings
  - Medium and large meetings (>250 delegates) are the most attractive types in terms of spend, duration, cost to acquire and number of participants
Where to play:
Meetings are the most attractive segment within the business tourism market

<table>
<thead>
<tr>
<th>Exhibitions</th>
<th>Incentives</th>
<th>Meetings</th>
</tr>
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<tbody>
<tr>
<td><strong>Global</strong></td>
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- Large market
- Contributes to SAT’s goals, particularly improving seasonality
- South Africa is well positioned to serve this market with world class facilities
- Although recently slipping down ICCA rankings, South Africa has a strong competitive position, and on a number of delegates hosted basis, its ranking is actually improving

Meet SAT’s goals, large and attractive market

* Estimates based on SAT departure surveys and Monitor analysis
Source: South African Departure Survey 2005, Monitor Analysis

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Exhibitions Market

Looking at the Exhibitions market in South Africa, exhibitions attract a largely domestic audience and are mostly confined to three cities

Marketing South Africa as an exhibition destination may not be the most effective vehicle in achieving SAT’s goals

Exhibition Visitors in South Africa 2004

Exhibitions Hosted by City

Given the domestic nature of the Exhibitions market, and lack of data on international arrivals, SAT’s resources may be best spent on other business tourism markets. However further information is needed for SAT to make a more informed choice

Source: EXSA, Monitor Analysis
### Incentives

#### Exhibitions

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#### Do not appear attractive at present – need more information from industry before they become a focus for SAT

#### Not a priority on their own — form part of the corporate meetings strategy

* Estimates based on SAT departure surveys and Monitor analysis

Source: South African Departure Survey 2005, Monitor Analysis
**Incentives Market**

The Incentives market is a small but lucrative market – it should be addressed in combination with corporate meetings rather than in its own right.

There is an overlap between corporate meetings and incentives buyers to be exploited.

---

### Incentives vs. Meetings

- Incentive travellers behave somewhere between Business Tourists and Leisure Tourists
  - Some incentive trips will include a meeting element
  - Others, however, are purely leisure trips
- There is currently a debate within the WTO about whether to re-classify incentives travellers as leisure tourists
- Buyers of incentive trips are often the same as buyers for corporate meetings
- Assuming equal effort required to attract a meeting and an incentive trip, cost of acquisition per delegate is higher for incentives than for meetings
- Better data on the South African incentives market is needed
  - Incentives houses may provide better data

---

**Global Tourism Outbound 2005**

<table>
<thead>
<tr>
<th>Travellers (mn)</th>
<th>Corporate Meetings</th>
<th>Assoc / Govt Meetings</th>
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<tr>
<td></td>
<td>13</td>
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**Global Average Spend / Delegate**

<table>
<thead>
<tr>
<th>Thousand Rands (US$)</th>
<th>Corporate Meetings</th>
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<tr>
<td></td>
<td>19 (3,001)</td>
<td>14 (2,150)</td>
<td>16 (2,510)</td>
</tr>
</tbody>
</table>

**Average Size of Trip / Meeting 2004**

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<tr>
<td></td>
<td>127</td>
<td>651</td>
<td>107</td>
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</table>

---

Source: ICCA/UIA, Meeting Professionals International, Society of Incentives and Travel Executives, Meetings and Conventions Magazine

Although an attractive market, we recommend approaching incentives in combination with corporate meetings.
Meetings

Exhibitions

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Meet SAT’s goals, large and attractive market

* Estimates based on SAT departure surveys and Monitor analysis
Source: South African Departure Survey 2005, Monitor Analysis
### The meetings market

The meetings market can be divided into three organisational types:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Inter-Governmental Meetings**           | - Meetings of representatives of governments and government institutions  
- Usually within multi-lateral or regional organisations / institutions, to negotiate relationships, set regional policy on key issues or set regional investment agendas  
- IGO meetings can be segmented into regional, international and large international meetings |
| **Corporate Meetings**                    | - Business-related meetings of private companies, sometimes including customers, suppliers and other external role-players  
- Sometimes include other corporate events such as exhibitions and product launches |
| **Association / NGO and Academic Meetings** | - Meetings of professional associations, industry associations, non-governmental organisations and academic groups  
- Exchange information, network with other professionals  
- Learn and develop their subject areas  
- Association meetings can be separated into Small, Medium and Large categories |
The meetings market
Each has cost / benefit implications, with associations the most favourable

Inter-governmental meetings are typically expensive to host, but they have potential spin-off benefits due to their high profile and the public status of their delegates.

Comparison of Meeting Segments by Cost and Benefit

Benefits
- Volume
- Geographic spread
- Spend
- Seasonality
- Length of stay
- Cost to acquire
- Growth

Costs
- Cost to city / country of hosting event:
  - Security costs
  - Management
  - Co-ordination
  - Delegate expenses

Bubble size represents market size in terms of number of delegates

Size of bubble equates to 5 Million delegates per annum

Source: Monitor Conference Survey 2001, Supplier Interviews, PCO Interviews, ICCA, UIA, Monitor Analysis

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The meetings market

All inter-Governmental meetings appear attractive but may have risks

- Regional and Continental meetings with synergies in areas of local expertise and policy focus could boost South Africa’s profile as a leader in SADC and Africa
  - Continental policy leadership
    - Trade negotiations
    - African development
    - Poverty alleviation
    - International relations
  - Leading in SADC policy areas
    - Food, Agriculture and Natural Resources (FANR)
    - Trade, Industry, Finance and Investment (TIFI)
    - Infrastructure and Services (I&S)
    - Social and Human Development and Special Programmes / SHD&SP)
    - HIV and AIDS Programme

- The large number of international organisations to which South Africa belongs (over 50 IGOs and 17 environmental treaties) gives plenty of opportunity to attract international meetings
  - These meetings are attractive as in general, they have to rotate between member countries and delegates usually pay for themselves
  - Moreover, they behave like Association Meetings with clear synergies in targeting and promotion

- Large inter-governmental summit meetings with Head-of-State involvement (such as WSSD) have the potential to generate significant positive benefits for South Africa
  - Significant foreign earnings and job creation
  - Positive press coverage
- However, this must be managed against some of the negative aspects
  - Potentially damaging negative publicity or problems with brand
The meetings market

Corporate meetings are small, volatile in demand and have short lead times.

### Contribution to Tourism’s Goals

- **Volume**
  - Corporate meetings represent over 95% of meetings in South Africa, bringing in an estimated 150,000 arrivals per year.

- **Spend**
  - Corporate meetings are more expensive to acquire per-delegate.

- **Length of Stay**
  - The length of stay for Corporate meetings is shorter than for other meetings and offers less opportunity for pre- and post-tours.

- **Distribution by Province**
  - Corporate meetings occur year round and school holidays make off-peak months more attractive.

- **Distribution by Season**
  - Corporate meetings are not confined to large cities or conference centres.

### Drawbacks

- The average global size of a Corporate meeting is 127 participants compared to 650 for an association meeting.
  - This makes corporate meetings more expensive to acquire per-delegate.

- Corporate meetings are highly subject to economic conditions — one of the first things to be cut during economic downturn is corporate travel budgets.

- Lead times for Corporate meetings (6–8 months) are typically much shorter than for association meetings (3–5 years), causing uncertainty in the meeting pipeline and posing challenges to meeting organisers.

### Global spend per delegate

<table>
<thead>
<tr>
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<th>Corporate</th>
<th>Association</th>
<th>Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average # of participants</td>
<td>133</td>
<td>463</td>
<td>2,588</td>
</tr>
<tr>
<td>Cost to acquire per delegate</td>
<td>$102</td>
<td>$29</td>
<td>$5</td>
</tr>
<tr>
<td>Cost to acquire per delegate</td>
<td>R612</td>
<td>R175</td>
<td>R31</td>
</tr>
</tbody>
</table>

1 MPI — Future watch 2006— “A comparative outlook on the global business of meetings “, Monitor Analysis, SAT, ICCA
The meetings market

**Association meetings** have advantages over corporate and IGO meetings

- Rotation policies for many associations make them an easier target to attract to South Africa
  - Potential for repeat business

- High potential for repeat leisure travel

- Stable business
  - Most associations are required to have meetings under their constitutions
  - Meetings tend to be organised 3–5 years in advance, giving a clear view of the pipeline of up and coming meetings to conference organisers and event venues

- Pre- and Post- tours are more likely to be purchased by association meeting participants than by corporate or government meeting participants
  - It is not uncommon for association participants to bring a travel partner
Within this Meetings segment, we recommend focusing on Medium and Large Associations and Inter-Governmental meetings

<table>
<thead>
<tr>
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<th>Rationale</th>
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<td></td>
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<tr>
<td>• Target regional inter-governmental meetings and international fora</td>
<td>• Regional meetings boost South Africa’s profile as a leader in SADC and Africa</td>
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<tr>
<td>• Attempt to secure <strong>one large International summit meeting every three years</strong> for positioning and awareness generation</td>
<td>• International fora behave like association meetings and there are targeting synergies</td>
</tr>
<tr>
<td><strong>Corporate Meetings</strong></td>
<td></td>
</tr>
<tr>
<td>• Deprioritise</td>
<td>• Large market</td>
</tr>
<tr>
<td>• Approach in combination with incentives</td>
<td>• However, subject to economic cycles, are generally small and therefore have a higher cost to acquire per delegate, are largely local or regional in nature and rarely lead to pre or post-meeting trips</td>
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<tr>
<td>• Use regional tourism authorities to target multinationals based in South Africa</td>
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<tr>
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<tr>
<td>• Target Large and Medium sized meetings</td>
<td>• Second largest market</td>
</tr>
<tr>
<td></td>
<td>• Stable business</td>
</tr>
<tr>
<td></td>
<td>– Planned 3–5 years in advance</td>
</tr>
<tr>
<td></td>
<td>– Associations obliged to hold meetings by their constitutions</td>
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<td>• Medium and large meetings are most attractive from a size, length of stay, spend and cost to acquire perspective</td>
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Agenda

- Goals and Aspirations
- Executive Summary and Context
- Where to Play
- How to Win
- Capabilities
- Appendix: Definitions
Executive Summary

How to Win

There are four areas where we can make a significant intervention in “How to Win”

1. Consumer understanding
   - We can target more effectively using consumer understanding gained in 2001
     - This research may require updating, although much of it remains valid
   - This insight can be shared with industry to help in the preparation of bid materials

2. Competitor Research
   - Ongoing competitor research will help revise choices around where to play and how to win
   - Understanding competitor messaging will also help to develop differentiated messaging

3. Targeting and lead generation
   - Through developing and maintaining local contact databases and using these to target priority associations and IGOs, SA Tourism will significantly boost its return on investment

4. Providing the lead in taking advantage of special events
   - SA Tourism can provide a link between industry and local organising committees to maximise the meetings gained off the back of the World Cup
     - This will help in South Africa’s goal to reach the top 10 meetings destination in 2010
   - However, they will also need to manage the pipeline around 2010 to prevent a post-World Cup slump in meetings
Our starting point . . .

South Africa’s recent performance and ranking is significantly below the top 10 in both ICCA and UIA rankings

Number of Meetings per Country for Top 25 Meeting Destinations (2005) — ICCA

Number of Meetings per Country for Top 25 Meeting Destinations (2005E) — UIA

Note: Data for SA may not be complete due to apparent non-submission by Durban and Cape Town
Source: International Congress and Convention Association (ICCA), Union of International Associations (UIA)

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However, current evaluation measures may not accurately reflect South Africa’s success

- ICCA (International Congress & Convention Association) data traditionally used by SAT to evaluate its performance in the meeting and convention sector) does not capture the full range of international association meetings
  - Onus is on providers to report meetings leads to distortions in data
  - UIA has a more complete picture as meetings are reported by the associations themselves

- ICCA ranks according to the number of meetings held rather than number of attendees
  - South Africa’s ranking does not reflect the fact that the country hosts more Medium and Large meetings than less lucrative smaller meetings (which constitute 43% of number of meetings, but only 9% of delegates)

- However, ICCA’s concentration on meetings that rotate gives a good picture of the “low hanging fruit” that South Africa can attract

- Moreover, there is a body of opinion that ICCA rankings are important for attracting meetings
There are four areas in which we can make a significant intervention in order to improve our rankings

Capitalise on Superior Consumer Understanding

- SAT can assist industry in developing compelling, well-targeted bid materials by acting on and developing consumer understanding gained in 2001 and sharing this more widely with industry
  - This research may require updating, although much of it remains valid

Improve Targeting and Lead Generation

- Through developing and maintaining local contact databases and using these to target priority associations and IGOs, SAT will significantly boost its return on investment

Exploit Insights From The Competitor Research

- By understanding competitors, SAT can develop differentiated messaging that sets South Africa apart as a destination
  - Ongoing competitor research will also help SAT to revise choices around ‘where to play’ and ‘how to win’ in the future

Providing the lead in taking advantage of special events

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**Capitalise on Superior Consumer Understanding**

Real steps can be taken to address some of the concerns raised about South Africa by meetings decision makers surveyed in 2001

| **Safety and Security** | • Provide tangible evidence of movement / change (e.g. crime stats) and highlight success stories (e.g., Newtown)  
• Post explicit warnings and “how to avoid” tips (c.f. *The Economist* city guide) – don’t try to hide issues, provide new special information services and numbers |
| **Political Stability** | • Stress effectiveness of transition to democracy, political inclusion, economic and social stability |
| **Direct International Flights** | • Difficult for SAT to change  
• Work with other stakeholders to lobby for air traffic liberalisation  
• Continue to address capacity constraint issues with SAA, etc.  
• Try to attract conferences in off-peak months to ease capacity constraints |
| **Accommodation Capacity** | • Gather up to date records of accommodation from the grading council  
• Illustrate bid documents with available accommodation and distance from venues  
• Use success stories of large conferences hosted (e.g., IDF)  
• Direct leads to appropriate venues |
| **General Appeal** | • Exciting marketing messages (e.g., Business Unusual)  
• Usual marketing activities (e.g., press placement, banner advertising, etc.) |
| **Travel Costs** | • Highlight overall value for money and use of value comparators (e.g., “Big Mac” index)  
• Highlight comparable value |
| **In Country Representatives** | • SAT’s offices already well positioned for most corporate, IGO and association business  
• Look into possibility of satellite offices in Geneva and Brussels  
• Allocate time for French/German officials to spend in Switzerland and Belgium |
| **Travel Distance** | • Put into another context (“ Same distance to Rome”)  
• Emphasis on strategic location as a hub / “Gateway to Africa”  
• Use time zone advantage – overnight flight from Europe – same time zone |

**Decision making criteria**

- **Very Important**
- **Moderately Important**
- **Less Important**
Incentive decision makers have a slightly different set of decision criteria to meetings decision makers.

South Africa’s performance relative to the importance of criteria for North American incentive decision-makers in 2001:

- **Very Important:**
  - Service levels
  - Safety and security
  - Accommodation cost
  - General appeal to delegates

- **Moderately Important:**
  - Scenic beauty
  - Variety of activities for all tastes
  - Sightseeing and cultural attractions
  - Modern technical systems
  - Airfare cost
  - Sport and recreational facilities
  - Unusual destination
  - Climate
  - Public transport
  - Duration of flight

- **Less Important:**
  - More detail on incentive buying process

Note: Excludes "don’t know" answers
Source: Monitor Survey of Incentive Travel Decision-Makers 2001
Capitalise on Superior Consumer Understanding – Incentives buying process
For North America, decision-makers’ awareness must be raised. In Western Europe, the specialist channel is more crucial

Salient Set of Destinations in Consumer Mind

How does South Africa get higher up on the list?

North America
- Invite decision-makers to try high-service South African products
- Link local suppliers to corporate travel agents and incentive houses
- Channel education program

W. Europe
- Showcase top-end products in channel
- Increase familiarisation trips and marketing to specialists / incentive houses
- Host specialist press on guest programs

Rest of World
- Push value priced products to corporate travel agents
- Create value-priced product offering
- Provide ‘last-minute’ booking options
**Capitalise on Superior Consumer Understanding – Incentives buying process**

Specific information about what is most important to each region should be provided in the appropriate media.

<table>
<thead>
<tr>
<th>North America</th>
<th>W. Europe</th>
<th>Rest of World</th>
</tr>
</thead>
<tbody>
<tr>
<td>CEOs and senior sales directors of listed companies</td>
<td>Specialist incentive houses</td>
<td>Sales directors of listed companies in Asia, India, Pakistan</td>
</tr>
<tr>
<td>Corporate travel agents and incentive houses</td>
<td>Sales and marketing directors</td>
<td>Corporate travel agents</td>
</tr>
<tr>
<td>Internet</td>
<td></td>
<td>Internet</td>
</tr>
</tbody>
</table>

**How to Reach the Segment**
- CEOs and senior sales directors of listed companies
- Corporate travel agents and incentive houses
- Internet

**Information Search**
- Destination and Trip Type Selection

**What Information?**
- Programs to decision-makers
- Virtual tours

**Value proposition:**
- Variety
- Value for money

**Value proposition:**
- DMC specialist service
- Unusual and great appeal to delegates
- Emphasise unique, unusual options

**Negative perceptions:**
- Address safety concerns
- Include endorsements
- Provide familiarisation programs to decision-makers
- Provide service quality assurance by accreditation of best providers

**Value proposition:**
- Inexpensive
- Beautiful
- Interesting

**Destination and Trip Type Selection**
- More variety
- More interesting culture and history
- Better value for money — more variety and adventure for $2,400

**How to Beat the Competition**
- More variety
- More interesting culture and history
- Better value for money — more variety and adventure for $2,400

**Unusual destination**
- More interesting and creative options in South Africa
- Better sports facilities
- Best climate on earth

**Better value for money**
- South African scenic beauty
- More interesting history
- Diverse rainbow culture
- Non-racist society

**Trip Booking**
- More variety
- More interesting culture and history
- Better value for money — more variety and adventure for $2,400

**Post-trip Evaluation**
- Address safety concerns
- Emphasise specialist expertise in incentive service-provision
- Accredited product linkages

**Value proposition:**
- Emphasise scenic beauty, sights, and cultural attractions
- Virtual beach / webcam

**Competition**
- Better value for money — more variety and adventure for $2,400
- More interesting and creative options in South Africa
- Better sports facilities
- Best climate on earth

**Post-trip Evaluation**
- Address safety concerns
- Give ‘hot deals’ links
- Discounts information to overcome cost barriers
- Emphasise scenic beauty, sights, and cultural attractions
- Virtual beach / webcam

**Value proposition:**
- Inexpensive
- Beautiful
- Interesting

**Source:** Monitor Survey & Analysis 2001
Capitalise on Superior Consumer Understanding – Incentives buying process

Barriers have a high degree of commonality and should be tackled head-on. In addition, SA’s strengths for each region should be emphasised.

Enable the Buyer to Evaluate South Africa on Key Features

Origination of Need / Desire To Buy an Incentive

Information Search

Destination and Trip Type Selection

Trip Booking

Post-trip Evaluation

North America

Overcome barriers and Negative perceptions:
- South Africa is far away
- Lack of awareness of products
- Safety and security fears
- Service levels

Emphasise relevant strengths:
- Variety
- Value for money
- Interesting, friendly culture

W. Europe

Overcome barriers and Negative perceptions:
- Unwillingness to travel long-haul on incentives
- Duration of flight
- Fear of crime
- Perceptions of poor service

Emphasise relevant strengths:
- Unusual, unique place
- Delegate appeal
- Many special things to discover

Rest of World

Overcome barriers and Negative perceptions:
- South Africa is not very safe
- Cost of South Africa may be too high

Emphasise relevant strengths:
- Value for money and great deals at non 5-star venues
- Beauty
- Great culture
- Interesting sights and history

Source: Monitor Survey & Analysis 2001

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Capitalise on Superior Consumer Understanding – Incentives buying process

The right product and trip type should be available for each consumer type, from a basic value package to a specialised and unique trip.

Design and Inform about Ideal Incentives

### North America
- Good deals on **accommodation**
- Good **group flight deal**
- Standard components — nightlife, shopping, culture and history tours
- South Africa — wildlife and bushveld component
- Offer wide variety of extra options (adventure, speakers, cultural experiences)
- Flexible service

### W. Europe
- Make distance manageable for them — break it down
- Specialised, **sophisticated incentive service**
- Sightseeing tours
- More **unique cultural experiences** (e.g., jazz club, contemporary South African dance)
- **Personal touch**
- Variety of unique experiences
- Quality **service** at venues

### Rest of World
- Fairly standard and ‘mass customisation’ packages
- Create **value-for-money deals** with 3 and 4 star offering
- Encourage them to see South Africa as **close by**
- Include sightseeing and history
- Cultural offering

---

Source: Monitor Survey & Analysis 2001

Business Tourism Growth Strategy v1
Capitalise on Superior Consumer Understanding – Incentives buying process

Trip Booking: Give them Custom Options

- Incentive house / corporate travel agent must be enabled to book expert, service oriented products and DMCs in South Africa.
- Efficient service required.
- Channel education program on South African options.
- Negotiate margins to ensure value for money to end user.

North America

W. Europe

- Specialist incentive house must have confidence to channel relationship clients to specialist DMCs in South Africa.
- Efficient, sophisticated booking service required.
- Channel education program — conduct SA incentive specialist tours / guest programs.

Rest of World

- Provide appropriate products to corporate travel agents:
  - Good value for money.
- Channel education program — South African value.
- Use web to link customers to good deals.
- Enable direct booking — give links to detailed information, give virtual tours, provide free online guide to best value incentive programs in South Africa.

Source: Monitor Survey & Analysis 2001

Business Tourism Growth Strategy v1
**Capitalise on Superior Consumer Understanding**

Going forward, we recommend regular updates to the customer insights and further action to address consumer needs and concerns.

**Consumer Insight Generation**

- Regular updates on customer buying criteria and perceptions
  - Perceptions of South Africa
  - Buying criteria and trends around incentives

**Consumer Insight Actions**

- More concerted marketing efforts through local association members / corporate representatives
- Industry-wide efforts to develop accreditation schemes and training programs
- Continued work with airlines to improve capacity and business tourism offer
- Continuing efforts on safety and security developments
There are four areas in which SAT can make a significant intervention in order to improve our rankings

- **Capitalise on Superior Consumer Understanding**
  - SAT can assist industry in developing compelling, well targeted bid materials by acting on and developing consumer understanding gained in 2001 and sharing this more widely with industry
    - This research may require updating, although much of it remains valid

- **Improve Targeting and Lead Generation**
  - Through developing and maintaining local contact databases and using these to target priority associations and IGOs, SAT will significantly boost its return on investment

- **Exploit Insights From The Competitor Research**
  - By understanding competitors, SAT can develop differentiated messaging that sets South Africa apart as a destination
    - Ongoing competitor research will also help SAT to revise choices around ‘where to play’ and ‘how to win’ in the future

- **Providing the lead in taking advantage of special events**
  - SAT can provide a link between industry and local organising committees to maximise the meetings gained off the back of the 2010 World Cup
    - This will help in South Africa’s goal to reach the top 10 meetings destination in 2010
  - However, they will also need to manage the pipeline around 2010 to prevent a post-World Cup slump in meetings
**Improve Targeting and Lead Generation**

**We have built databases for association and IGO meetings, which provide local contact details, headquarter and important meeting details**

*We also incorporated a scoring matrix which helps to prioritise these meetings and identify the most attractive ones for SA Tourism to pursue*

<table>
<thead>
<tr>
<th>Associations Database</th>
<th>IGO database</th>
</tr>
</thead>
<tbody>
<tr>
<td>● 2,869 association meetings</td>
<td>● 342 IGO meetings</td>
</tr>
<tr>
<td>– 134 high priority</td>
<td>– 5 high priority</td>
</tr>
<tr>
<td>– 352 low-hanging fruit</td>
<td>– 115 low-hanging fruit</td>
</tr>
<tr>
<td>– 439 medium-long term investment</td>
<td>– 8 medium-long term investment</td>
</tr>
<tr>
<td>– 219 low priority</td>
<td>– 214 low priority</td>
</tr>
<tr>
<td>– 1,725 with limited information</td>
<td>– Details included</td>
</tr>
<tr>
<td>● Details included</td>
<td>– Global contact</td>
</tr>
<tr>
<td>– Local contact</td>
<td>– Duration</td>
</tr>
<tr>
<td>– Global contact</td>
<td>– Subject</td>
</tr>
<tr>
<td>– Duration</td>
<td>– Preferred month</td>
</tr>
<tr>
<td>– Subject</td>
<td>– Attendance</td>
</tr>
<tr>
<td>– Preferred month</td>
<td>– Location of previous meetings</td>
</tr>
<tr>
<td>– Attendance</td>
<td>– Location of previous meetings</td>
</tr>
<tr>
<td>– Venue</td>
<td>– Exhibition component</td>
</tr>
<tr>
<td>– Exhibition component</td>
<td>– Location of previous meetings</td>
</tr>
<tr>
<td>– Location of previous meetings</td>
<td>– Location of previous meetings</td>
</tr>
</tbody>
</table>

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**Improve Targeting and Lead Generation – Associations Meetings**

Using its lead facilitation mandate, SAT can create significant leverage for industry through prioritising and targeting attractive associations.

**Opportunities in the “High Priority” and “Low Hanging Fruit” segments for associations should be pursued aggressively through local reps and head offices**

<table>
<thead>
<tr>
<th>Medium-Long Term Investment</th>
<th>Most Attractive</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>High Priority</strong></td>
<td><strong>Low Hanging Fruit</strong></td>
</tr>
<tr>
<td><strong>Characteristics</strong></td>
<td><strong>Characteristics</strong></td>
</tr>
<tr>
<td>- Large, greater than 2 days duration and typically happen in arrivals troughs</td>
<td>- Small, short meetings in peak arrivals months</td>
</tr>
<tr>
<td>- However, may have been to SA recently or there is no SA representative of the association</td>
<td>- No SA representatives of the association and no SAT presence in host country</td>
</tr>
<tr>
<td><strong>Actions</strong></td>
<td><strong>Actions</strong></td>
</tr>
<tr>
<td>- Build and maintain relationships with SA representatives to keep South Africa on the radar screen</td>
<td>- Aggressively pursue opportunities</td>
</tr>
<tr>
<td>- Provide support to SA representatives to be active members of the association (“ambassador program”)</td>
<td>- Contact local representative and suggest hosting</td>
</tr>
<tr>
<td>- Continue to develop local associations database to “fill in blanks”</td>
<td>- Contact headquarters</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Low Priority</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Characteristics</strong></td>
<td><strong>Characteristics</strong></td>
</tr>
<tr>
<td>- Small, short meetings in peak arrivals months</td>
<td>- Small, short meetings in peak arrivals months</td>
</tr>
<tr>
<td>- No SA representatives of the association and no SAT presence in host country</td>
<td>- However, South African Representation and SAT presence in host country</td>
</tr>
<tr>
<td><strong>Actions</strong></td>
<td><strong>Actions</strong></td>
</tr>
<tr>
<td>- Do not invest resources in trying to attract these meetings</td>
<td>- Pursue opportunities</td>
</tr>
<tr>
<td>- However, track developments to see if they move into other quadrants (increased meeting size, appointment of South African representatives etc.)</td>
<td>- Contact local representative and suggest hosting</td>
</tr>
<tr>
<td>- Continue to develop local associations database to “fill in blanks”</td>
<td>- Contact headquarters</td>
</tr>
</tbody>
</table>

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---
Improve Targeting and Lead Generation – Inter-Governmental Meetings

For IGOs, SAT needs to develop relationships with the relevant ministries to encourage them to offer to host meetings

- Use existing contacts (Department of Environmental Affairs and Tourism) to push for appropriate high priority and low hanging fruit conferences

- Build relationships with key ministries (Department of Finance, Department of Foreign Affairs, Department of Agriculture, Department of Social Development) to encourage bidding for international conferences

- Provide liaison point between ministers and industry providers (PCOs, Convention Centres) to organise conferences

- Continue to look for further opportunities and to develop the IGO database
  - Look for new UN summits and other IGO meetings
  - Fill in the blanks in the current IGO database
**Improve Targeting and Lead Generation – Corporate Meetings and Incentives**

Targeting of corporate meetings and incentives should be focused on countries investing heavily in South Africa

*The UK is the single largest investor in South Africa, with North America and the rest of Europe a distant second*

---

**Total Stock of Foreign Direct Investments in South Africa by Country / Region in 2003**

<table>
<thead>
<tr>
<th>Country / Region</th>
<th>% of Total Stock of FDI</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>62%</td>
</tr>
<tr>
<td>North America</td>
<td>10%</td>
</tr>
<tr>
<td>South &amp; East Asia</td>
<td>6%</td>
</tr>
<tr>
<td>Germany</td>
<td>6%</td>
</tr>
<tr>
<td>Italy</td>
<td>2%</td>
</tr>
<tr>
<td>France</td>
<td>2%</td>
</tr>
<tr>
<td>Africa</td>
<td>2%</td>
</tr>
<tr>
<td>Spain</td>
<td>2%</td>
</tr>
<tr>
<td>Belgium</td>
<td>1%</td>
</tr>
<tr>
<td>Greece</td>
<td>1%</td>
</tr>
<tr>
<td>Denmark</td>
<td>1%</td>
</tr>
<tr>
<td>Portugal</td>
<td>1%</td>
</tr>
<tr>
<td>Sweden</td>
<td>1%</td>
</tr>
<tr>
<td>Middle East</td>
<td>1%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>1%</td>
</tr>
<tr>
<td>Ireland</td>
<td>0%</td>
</tr>
<tr>
<td>Austria</td>
<td>0%</td>
</tr>
<tr>
<td>Oceania</td>
<td>0%</td>
</tr>
<tr>
<td>Finland</td>
<td>0%</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>0%</td>
</tr>
<tr>
<td>Multi-state (within the EU)</td>
<td>0%</td>
</tr>
<tr>
<td>Latin America &amp; Caribbean</td>
<td>0%</td>
</tr>
<tr>
<td>Unallocated</td>
<td>0%</td>
</tr>
</tbody>
</table>

*Source: “Foreign Direct Investment in South Africa” — Crefsa, LSE, Business Map Foundation, SAT, Monitor Analysis*
**Improve Targeting and Lead Generation – Corporate Meetings and Incentives**

SAT offices are generally well placed against the major countries hosting multinationals with operations in South Africa.

Once again, Switzerland and Belgium emerge as gaps in the portfolio.

---

**Multinationals Headquarters by Country**

- **USA**: 252
- **UK**: 142
- **Japan**: 86
- **Belgium**: 48
- **Sweden**: 39
- **Denmark**: 33
- **India**: 16
- **Finland**: 15
- **Canada**: 15
- **Malaysia**: 14
- **S. Korea**: 13
- **Spain**: 12
- **Australia**: 12
- **Portugal**: 9
- **Norway**: 8
- **China**: 7
- **Brazil**: 6
- **Greece**: 5
- **Pakistan**: 4
- **Other**: 3

* Other includes all countries with one multinational headquartered in South Africa. Some companies’ headquarters could not be verified.

Source: Business Monitor Database, Monitor Analysis
Many of the foreign companies investing in South Africa appear to be in basic industries such as manufacturing, chemicals and construction.

Source: Business Monitor Database, Monitor Analysis
Improve Targeting and Lead Generation – Corporate Meetings and Incentives

The key decision-maker for incentive destinations appear to be the CEO or senior general manager in the firm...

Sales and marketing managers are frequently involved in the decision. The admin staff such as incentive/meeting managers have very limited decision-rights.

Key Decision-Maker / Process Followed When Choosing a Destination

<table>
<thead>
<tr>
<th>Percentage of Mentions</th>
<th>CEO / Chairperson</th>
<th>Board Members</th>
<th>Sales and Marketing Management</th>
<th>HR Director / Manager</th>
<th>Meetings Manager / Administrator</th>
<th>Voting of Personnel</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>30.4%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15.2%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15.0%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13.0%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10.9%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.7%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: MICE Survey of Incentive Travel Decision-Makers 2001 (SAT)
Improve Targeting and Lead Generation – Corporate Meetings and Incentives

... And specialist incentive houses appear to be the best channel to target for boosting incentives

Channels Used for Purchasing Incentive Trips

- Corporate Travel Agent: 38%
- Specialist: 31%
- Direct Bookings: 12%
- Retail Travel Agent: 10%
- Other: 6%
- Internet Booking: 4%

Source: MICE Survey of Incentive Travel Decision-Makers 2001 (SAT)
Improve Targeting and Lead Generation – Corporate Meetings

SAT should concentrate on overlap between corporate meetings planners and incentives buyers to generate synergies

- Identify cross-selling opportunities between meetings and incentives

- Target industries with large sales forces, large management layers or large dealer networks
  - e.g., Pharmaceuticals, IT, Financial Services

- Target major decision maker
  - Can be CEO, Board Members, Sales and Marketing Management, HR Director / Manager or Meeting planner
There are four areas in which SAT can make a significant intervention in order to improve our rankings

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  - However, they will also need to manage the pipeline around 2010 to prevent a post-World Cup slump in meetings
**Exploit Insights From The Competitor Research**

We can develop messages to differentiate itself from its competitors whilst learning from their strengths.

South Korea and Australia appear to represent the biggest threats, with significant investments in their business tourism industries and some overlap in the target markets.

### Focus

- **Australia**
  - Corporate meetings and incentives for IT / Technology, Pharma / Medical, Insurance, Finance, Automotive and Direct Selling Companies
  - UK / Europe, North America, Asia

- **Brazil**
  - Association meetings, corporate meetings and incentives for Technology, Automotive and Medical
  - Europe, North America

- **South Korea**
  - Large meetings particularly in the associations market
  - Medical, Financial, IT, Fashion and Design
  - Asia Pacific, Europe, North America

### Key Success Factors

- **Australia**
  - Good customer perception (safe, secure, English speaking)
  - Strong ties between TEA, CVBs and industry
  - Strong, well funded CVBs
  - Ambassador program
  - Commitment to standards and training in the industry

- **Brazil**
  - Strong country brand
  - Legacy and experience
  - Relative proximity to and beneficial time difference with US

- **South Korea**
  - High level of investment from government (US$50Mn over 5 years)
    - Bid funds
  - Big investment in training
  - Large number of direct international connections
  - Very modern facilities

### SAT’s Competitive Edge

- **Australia**
  - Relative ease of access – much closer to target markets
  - Beneficial time difference for Europeans
  - Focus on associations rather than corporates

- **Brazil**
  - More up-to-date facilities
  - Greater focus on Business Tourism
  - Beneficial time difference for Europeans

- **South Korea**
  - Better pre- and post- tour options
  - Beneficial time difference for Europeans

### Key Learnings for SA

- **Australia**
  - Improve interface with industry
  - Strengthen Convention bureaux
  - Establish fund to support bids

- **Brazil**
  - Invest in training and development
  - Monitor competitor developments every 2-3 years

---

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Exploit Insights From The Competitor Research

South Africa has less meetings from its regional rotation area than its competitors.

Australia and Brazil appear to represent a greater threat to South Africa in targeting the “World” rotation area.

Proportion of Meetings by Rotation Area

Source: ICCA Customised Competitor Report
Exploit Insights From The Competitor Research

South Africa has grown capacity in the past 4 years and is well equipped to deal with most sized conferences

However, its major conference destinations have less capacity than cities in rival countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of 3 Star</th>
<th>Number of 4 Star</th>
<th>Number of 5 Star</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>14,697</td>
<td>12,000</td>
<td>12,124</td>
</tr>
<tr>
<td>Brazil</td>
<td>7,686</td>
<td>4,056</td>
<td>4,678</td>
</tr>
<tr>
<td>South Korea</td>
<td>13,819</td>
<td>604</td>
<td>9,733</td>
</tr>
<tr>
<td>South Africa</td>
<td>9,072</td>
<td>4,089</td>
<td>5,000</td>
</tr>
</tbody>
</table>

Note: For Melbourne, 4 and 5 Star have been combined; Assumed that Seoul has a similar distribution to Busan
Source: Worldwide Convention Centres Directory; Regional Convention Bureaux (Rio, Seoul, Busan), SA Grading Council
Exploit Insights From The Competitor Research

South Africa’s meetings mix closely matches the world average, but with a higher proportion of meetings in technology, sport and law

Meetings by Subject Matter, of SA’s Key Competitors in the Association Meetings Market (1996–2005)

<table>
<thead>
<tr>
<th>Subject</th>
<th>Australia</th>
<th>Brazil</th>
<th>South Korea</th>
<th>South Africa</th>
<th>World</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical Sciences</td>
<td>14.6%</td>
<td>23.6%</td>
<td>21.6%</td>
<td>20.1%</td>
<td>23.9%</td>
</tr>
<tr>
<td>Science</td>
<td>12.8%</td>
<td>12.1%</td>
<td>15.1%</td>
<td>12.9%</td>
<td>12.3%</td>
</tr>
<tr>
<td>Technology</td>
<td>5.5%</td>
<td>10.5%</td>
<td>8.0%</td>
<td>15.9%</td>
<td>11.1%</td>
</tr>
<tr>
<td>Industry</td>
<td>9.3%</td>
<td>5.9%</td>
<td>8.3%</td>
<td>7.0%</td>
<td>7.9%</td>
</tr>
<tr>
<td>Education</td>
<td>5.8%</td>
<td>5.5%</td>
<td>4.7%</td>
<td>3.7%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Social Sciences</td>
<td>4.5%</td>
<td>3.5%</td>
<td>6.1%</td>
<td>3.0%</td>
<td>4.6%</td>
</tr>
<tr>
<td>Commerce</td>
<td>6.3%</td>
<td>4.5%</td>
<td>3.3%</td>
<td>4.4%</td>
<td>4.1%</td>
</tr>
<tr>
<td>Economics</td>
<td>4.0%</td>
<td>3.4%</td>
<td>5.0%</td>
<td>4.3%</td>
<td>4.1%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>6.8%</td>
<td>4.9%</td>
<td>4.3%</td>
<td>2.0%</td>
<td>3.4%</td>
</tr>
<tr>
<td>Management</td>
<td>4.3%</td>
<td>3.9%</td>
<td>4.2%</td>
<td>2.8%</td>
<td>3.3%</td>
</tr>
<tr>
<td>Transport &amp; Communication</td>
<td>4.3%</td>
<td>3.3%</td>
<td>3.6%</td>
<td>3.9%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Culture &amp; Ideas</td>
<td>5.0%</td>
<td>2.5%</td>
<td>1.7%</td>
<td>3.3%</td>
<td>2.4%</td>
</tr>
<tr>
<td>Arts</td>
<td>0.5%</td>
<td>2.2%</td>
<td>0.9%</td>
<td>1.7%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Sports &amp; Leisure</td>
<td>1.8%</td>
<td>2.9%</td>
<td>1.7%</td>
<td>3.0%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Law</td>
<td>3.8%</td>
<td>2.1%</td>
<td>2.6%</td>
<td>3.0%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Other</td>
<td>10.6%</td>
<td>9.1%</td>
<td>9.0%</td>
<td>9.1%</td>
<td>9.1%</td>
</tr>
</tbody>
</table>

Number of Meetings with details (1996-2005) 1,032  578  541  397  32,334

Note: Top 10 subjects per country / world
Source: ICCA customised competitor report
There are four areas in which SAT can make a significant intervention in order to improve our rankings

- **Capitalise on Superior Consumer Understanding**
  - SAT can assist industry in developing compelling, well targeted bid materials by acting on and developing consumer understanding gained in 2001 and sharing this more widely with industry
  - This research may require updating, although much of it remains valid

- **Improve Targeting and Lead Generation**
  - Through developing and maintaining local contact databases and using these to target priority associations and IGOs, SAT will significantly boost its return on investment

- **Exploit Insights From The Competitor Research**
  - By understanding competitors, SAT can develop differentiated messaging that sets South Africa apart as a destination
  - Ongoing competitor research will also help SAT to revise choices around ‘where to play’ and ‘how to win’ in the future

- **Providing the lead in taking advantage of special events**
  - SAT can provide a link between industry and local organising committees to maximise the meetings gained off the back of the 2010 World Cup
    - This will help in South Africa’s goal to reach the top 10 meetings destination in 2010
  - However, they will also need to manage the pipeline around 2010 to prevent a post-World Cup slump in meetings
Providing the lead in taking advantage of special events

Looking at the example of Japan and South Korea, it is likely that South Africa will benefit significantly from the effects of hosting the World Cup. However, this will probably not be enough on its own to get South Africa into the ICCA top 10 and it may well be followed by a significant drop off in the following year.

Number of Meetings in Japan and Korea (2000–2005)

<table>
<thead>
<tr>
<th>Year</th>
<th>Japan</th>
<th>South Korea</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996</td>
<td>146</td>
<td>52</td>
</tr>
<tr>
<td>1997</td>
<td>131</td>
<td>53</td>
</tr>
<tr>
<td>1998</td>
<td>152</td>
<td>60</td>
</tr>
<tr>
<td>1999</td>
<td>136</td>
<td>60</td>
</tr>
<tr>
<td>2000</td>
<td>158</td>
<td>46</td>
</tr>
<tr>
<td>2001</td>
<td>191</td>
<td>95</td>
</tr>
<tr>
<td>2002</td>
<td>187</td>
<td>96</td>
</tr>
<tr>
<td>2003</td>
<td>156</td>
<td>74</td>
</tr>
<tr>
<td>2004</td>
<td>147</td>
<td>118</td>
</tr>
<tr>
<td>2005</td>
<td>142</td>
<td>108</td>
</tr>
</tbody>
</table>

ICCA Ranking Japan: 7 9 7 8 9 7 7 8 9 12
ICCA Ranking Korea: 19 22 22 24 31 17 20 27 16 17

Source: ICCA Database

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**Providing the lead in taking advantage of special events**

SAT should liaise heavily with the local organising committee to gain World Cup related meetings and manage the 2010 effect on association meetings.

<table>
<thead>
<tr>
<th>World Cup Specific Meetings</th>
<th>Other Association Meetings</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Co-ordinate with local organising committee</td>
<td>• Manage pipeline around 2010</td>
</tr>
<tr>
<td>• Encourage organising committee to bid to host 2010 related meetings in SA</td>
<td>– Manage capacity around the event</td>
</tr>
<tr>
<td>• Provide support to 2010 organising committee</td>
<td>– Try to mitigate “post-2010” slump</td>
</tr>
<tr>
<td>– Marketing materials</td>
<td>o Over-invest in developing pipeline for 2011</td>
</tr>
<tr>
<td>– Links to providers (SAA, ICCs, PCOs, etc.)</td>
<td>• Prepare special packs for 2010 meetings</td>
</tr>
<tr>
<td>– Access to research etc.</td>
<td></td>
</tr>
</tbody>
</table>
While there are clearly defined roles for the different entities within the business tourism market . . .

**SAT**
- Conference delegate tracking studies
- Collating of ICCA data
- Submission of ICCA data

**CVB**
- Own research departments for lead generation within ICCs
- Gathering of ICCA data

**Trade**
- Customer satisfaction survey
- Own branding and marketing
- Alignment with destination brand

**Insight and Research**
- Provides strategic information to help develop the trade
  - Market research
  - Insight generation
  - Strategic direction
  - Intelligence gathering

**Brand and Marketing**
- Overall positioning
  - Development of SA’s Business Tourism Business Unusual campaign
- International marketing through regional offices, trade fairs and other marketing platforms
- Development of regional Business Tourism brand
  - Align with and execute against “Business Unusual”
  - Align with SAT’s global marketing plan

**Product Development**
- Advice to trade on gaps in product
  - Development of product/venue ideas
    - Alternative venues
    - Add-ons and excursions
  - Tailoring of product to market demands
    - Refurbishment
    - Development of new product

**Lead Generation**
- Facilitation of identification and forwarding of leads for incentives and association meetings
  - Liaison with government to generate IGO leads
  - Lead generation and distribution to membership base
  - Lead tracking
    - Success metrics
    - Economic impact modelling

**Bidding Process**
- Run bid documents with associations, meeting planners and venue
- Full time researcher to determine the criteria for a bid in some ICCs
  - Heavily involved in bid process
  - Run/fund Site inspections

**Accreditation and Development**
- Development and professionalisation of trade associations
  - Liaison with government to position Business Tourism as priority investment
  - Grading council
  - Education, primarily for SMEs
  - Service charters and standards from partner organisations (e.g., Cape Town)
  - Development of accredited Business Tourism guides

Source: Interviews with BT Team, ICC heads, Monitor Analysis
There are certain capability gaps which should be plugged

<table>
<thead>
<tr>
<th>SAT</th>
<th>CVB</th>
<th>Trade</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Insight and Research</strong></td>
<td><strong>Brand and Marketing</strong></td>
<td><strong>Product Development</strong></td>
</tr>
<tr>
<td>• Provide advice and support to trade on survey development and data collection</td>
<td>• Proper packaging of Business Unusual through the chain</td>
<td>• Facilitate links to SAA on behalf of trade for conference / incentive deals</td>
</tr>
<tr>
<td>• Repository of the ‘Compelling Bid Documentation’</td>
<td>• Conduct product audit</td>
<td>• Use local contact database to build ambassador program with really attractive associations</td>
</tr>
<tr>
<td>• Encourage sharing of market intelligence</td>
<td>• Business usual vs. business unusual product</td>
<td>• Establish ambassador fund</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Lead Generation</strong></th>
<th><strong>Bidding Process</strong></th>
<th><strong>Accreditation and Development</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Use of SAT facilities in HQ countries</td>
<td>• Use of SAT facilities in HQ countries</td>
<td>• Extend Fundi program to Business Tourism trade</td>
</tr>
<tr>
<td>• Greater input into bid documents and process</td>
<td>• More delegate boosting</td>
<td>• Support for bids</td>
</tr>
<tr>
<td>• Support for fam trips</td>
<td>• More delegate boosting</td>
<td>• Sourcing of sponsorship funds</td>
</tr>
<tr>
<td>• Market appropriate product to demand</td>
<td>• Market appropriate product to demand</td>
<td>• Support fund for bids</td>
</tr>
<tr>
<td>• Support for fam trips</td>
<td>• Support fund for bids</td>
<td>• Provide funds / scholarships for training</td>
</tr>
</tbody>
</table>

• Trade associations to define industry standards and set up accreditation programs
• Trade associations to liaise with colleges on accredited degree programs / PD courses

**Source:** Interviews with BT Team, ICC Heads
Regular, formal interactions with the trade will be vital for the strategy to be a success

**Individual ICCs / CVBs**
- Regular updates on leads being pursued and leads from SAT to CVBs
- Discussion of support requirements for up-coming bids
- Co-ordination of lead generation and allocation (to show it is a clear and transparent system)
- Sharing of insight and co-ordination of data collection needs (customer satisfaction surveys, etc.)
- Co-ordination around special events

**Trade as a Whole**
- Share strategy, plans and overall research
- Product development
- Alignment to destination brand and destination marketing efforts
- Definition of standards and accreditation
- Co-ordination of training and development programs
Finally, implementation plans should be developed clearly allocating responsibility and defining key milestones and metrics to measure progress.

### Progress Against Key Objectives

<table>
<thead>
<tr>
<th>SAT</th>
<th>Trade</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Regular review of departure survey data to assess business tourism contribution to SAT’s key goals (input on survey update)</td>
<td></td>
</tr>
<tr>
<td>- Arrivals volume</td>
<td>• Key metrics around visitor numbers etc.</td>
</tr>
<tr>
<td>- Spend</td>
<td>- Number of Delegates</td>
</tr>
<tr>
<td>- Length of stay</td>
<td>- Number of Delegate Days</td>
</tr>
<tr>
<td>- Geographical spread</td>
<td>- Average Number of Delegates</td>
</tr>
<tr>
<td>- Seasonality</td>
<td>- Average number of Days per Delegate</td>
</tr>
<tr>
<td>• ICCA and UIA ranking</td>
<td>- Average Expenditure per Delegate</td>
</tr>
<tr>
<td>• Development of forward looking metrics — future pipeline of meetings</td>
<td>• Collect ICCA and UIA data</td>
</tr>
</tbody>
</table>

### Targeting and Lead Generation

<table>
<thead>
<tr>
<th>SAT</th>
<th>Trade</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Number of leads contacted</td>
<td>• Number of bids won</td>
</tr>
<tr>
<td>• Number of leads forwarded on to CVBs</td>
<td>- International</td>
</tr>
<tr>
<td>• Conversion success rate</td>
<td>- National</td>
</tr>
<tr>
<td></td>
<td>• Bid Success Ratio</td>
</tr>
<tr>
<td></td>
<td>• Economic impact assessment</td>
</tr>
</tbody>
</table>

### Customer Satisfaction / Perception

<table>
<thead>
<tr>
<th>SAT</th>
<th>Trade</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Customer perception indexing</td>
<td>• Customer satisfaction ratings</td>
</tr>
<tr>
<td></td>
<td>- Services levels</td>
</tr>
<tr>
<td></td>
<td>- Value for money</td>
</tr>
<tr>
<td></td>
<td>- Facilities</td>
</tr>
<tr>
<td></td>
<td>- Flight capacity</td>
</tr>
<tr>
<td></td>
<td>- Safety and security</td>
</tr>
</tbody>
</table>
Goals and aspirations:
A clear set of choices has been made to meet these objectives

- To help meet the **6 key goals** of SAT
  - Increase in tourist **volume**
  - Increase in tourist **spend**
  - Increase **length of stay**
  - Improve **geographic spread**
  - Improve **seasonality** patterns
  - Promote **transformation**
- To be amongst the **top ten global conference destinations by 2010**

- Concentrate on the **association and IGO meetings markets**
  - Medium and Large Association Meetings
  - Medium and Large IGO’s
  - Aim to host one large International head-of-state meeting every three years
  - We have identified actual targets
- Use regional tourism offices to **target corporations** based in their areas
- **De-prioritise exhibitions** until more data is available
- Use **incentives as a way to draw in corporate meetings**
- Use and develop existing **consumer understanding**
  - Share this information with trade
- Regularly conduct **competitor research** to revise choices and develop differentiated messaging
- Use **prioritisation matrices to target** most promising leads in the association and IGO markets
- Use the **World Cup as a lever to raise South Africa’s world ranking**
  - However, be careful to manage capacity around 2010 to prevent a major fall-off in the following years
- **Greater co-operation between government and industry**
  - Consider industry advisory board for SAT
- **Ambassador programs** to raise the profile of South African in target associations
- **Definition of standards** and establishment of accreditation scheme through trade associations
- Clearly defined **metrics and implementation plans**

**Contributing to Tourism’s 6 key objectives is certainly achievable**

*However, attaining Top 10 conference destination status by 2010 will be a significant challenge*
Agenda

- Context
- Goals and Aspirations
- Where to Play
- How to Win
- Capabilities

Appendix: Definitions
Scope:
Of the many purposes of travel, the scope of this project is business tourism

Leisure, personal shopping, and traders are targeted by different entities (either within SAT or in other Government Departments)

This project focuses on business tourism
### Purposes of Travel to / within South Africa

<table>
<thead>
<tr>
<th>LEISURE</th>
<th>BUSINESS</th>
<th>MEDICAL</th>
<th>RELIGIOUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday –</td>
<td>Trading –</td>
<td>Medical treatment –</td>
<td>Religion or pilgrimages</td>
</tr>
<tr>
<td>A trip which is undertaken</td>
<td>A trip undertaken to shop for</td>
<td>A trip which is undertaken for medical</td>
<td></td>
</tr>
<tr>
<td>where the purpose is any kind</td>
<td>goods that will be resold i.e.</td>
<td>treatment and includes elective surgery</td>
<td></td>
</tr>
<tr>
<td>of leisure activity. This</td>
<td>wholesale</td>
<td></td>
<td></td>
</tr>
<tr>
<td>may, for example, include</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>golf or bird watching,</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>cultural exploration, fun,</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>adventure or relaxation,</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>sports trips and visits to</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>health spas.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visiting friends and</td>
<td>Business travel -</td>
<td></td>
<td></td>
</tr>
<tr>
<td>relatives –</td>
<td>A trip which is undertaken</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A trip which is undertaken to</td>
<td>with the purpose being to</td>
<td></td>
<td></td>
</tr>
<tr>
<td>see, socialize with, or to</td>
<td>conduct commercial or formal transactions or activities that are related to your job e.g. visiting a client, signing deals, negotiating a contract (including import/export) etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>spend time with relatives and/or friends. The person need not have stayed at the relative’s house. The purpose of visit includes weddings and funerals.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping –</td>
<td>Business tourism –</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A trip which is undertaken to</td>
<td>A trip which is undertaken with the purpose of attending a conference, meeting, exhibition, event or as part of an incentive.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>shop for goods that will be</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>used by the tourist him/herself, and will not be re-sold. The goods will be taken back by the tourist him/herself i.e. retail</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The following definitions and assumptions were used in analysis of the SA Tourism departure survey data

<table>
<thead>
<tr>
<th>Category</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical Tourism</td>
<td>Data analysis from SAT departure survey where “Health / Medical” is indicated as primary or secondary purpose of visit. Air and land data sets are used to generate the output.</td>
</tr>
<tr>
<td>Personal Shopping</td>
<td>We define Personal Shoppers when “Shopping — buying goods for personal use” is the primary purpose of visit, both air and land data is included. Where we run further analysis on tourists with Shopping as secondary purpose for comparison purposes this is noted.</td>
</tr>
<tr>
<td>Traders</td>
<td>We define Traders when “Shopping — buying goods for business use” is the primary purpose of visit, both air and land data is included.</td>
</tr>
<tr>
<td>Business Travel</td>
<td>A trip which is undertaken with the main purpose being to conduct commercial or formal transactions or activities that are related to a job. Considered when this is stated as the primary purpose of visit, both air and land datasets are queried.</td>
</tr>
<tr>
<td>Business Tourism</td>
<td>“Business-convention / conference/exhibition” is declared as primary or secondary purpose and both air and land datasets are queried.</td>
</tr>
<tr>
<td>Leisure travel</td>
<td>Output where “General Holiday” and VFR is the primary purpose of visit, Air and land respondents are included (Note: does not consider cases where it is mentioned as secondary purpose).</td>
</tr>
<tr>
<td>Spend</td>
<td>Calculated as the sum of tourist’s spend in South Africa, less any capital expenditure and less any spend declared for ‘other’ purposes.</td>
</tr>
<tr>
<td>Long-haul</td>
<td>Determined to be flights of more than 5 hours duration, or countries that do not have direct connection to South Africa.</td>
</tr>
<tr>
<td>Short-haul and land</td>
<td>Origin within five hours direct commercial flying distance or land-based arrivals.</td>
</tr>
</tbody>
</table>

Source: SAT Departure Survey Dataset Neesh combined.Sav, Weighting 1 Used, Discussed with Neesh
The following definitions and sub-groupings were used for the international* meetings markets

<table>
<thead>
<tr>
<th>Inter-governmental(^1)</th>
<th>Corporate</th>
<th>Association (International Non-governmental)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Meetings of representatives of governments and government institutions</td>
<td>• Business-related meetings of private companies, sometimes including customers, suppliers and other external role-players</td>
<td>• Meetings of professional associations, industry associations, non-governmental organisations and academic groups</td>
</tr>
<tr>
<td>• Usually within multi-lateral or regional organisations / institutions, to negotiate relationships, set regional policy on key issues or set regional investment agendas</td>
<td>• Sometimes include other corporate events such as exhibitions and product launches</td>
<td>• Exchange information, network with other professionals</td>
</tr>
<tr>
<td>• Regional and Continental Inter-Governmental Meetings (e.g., SADC, NEPAD, AU)</td>
<td>• International Inter-Governmental Forums (e.g., WTO, WEF, World Bank, UNDP, UNCTAD)</td>
<td>• Learn and develop their subject areas</td>
</tr>
<tr>
<td>• Large Inter-Governmental Summit Meetings (e.g., WSSD, HIV / AIDS, WCAR)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

\(^1\) Sub-groupings of inter-governmental meetings are Monitor defined

* This definition explicitly excludes domestic meetings and, in particular the Intra-governmental meetings market may be quite a large market and which would meet a number of national objectives set by SAT
The “Meetings Industry”

The International Association of Professional Congress Organizers’ published definitions for the industry are as follows

- **Meeting** — general term indicating the coming together of a number of people in one place, to confer or carry out a particular activity. Frequency: can be on an ad hoc basis or according to a set pattern, as for instance annual general meetings, committee meetings, etc.

- **Conference** — participatory meeting designed for discussion, fact-finding, problem solving and consultation. As compared with a congress, a conference is normally smaller in scale and more select in character — features which tend to facilitate the exchange of information. The term "conference" carries no special connotation as to frequency. Though not inherently limited in time, conferences are usually of limited duration with specific objectives.

- **Incentive** — meeting event as part of a programme which is offered to its participants to reward a previous performance.

- **Congress** — an association usually made up of delegates from constituent organizations (Merriam-Webster's dictionary).

- **Exhibition** — Events at which products and services are displayed.
Meetings Tourism

There are two sources for sizing the global association Meeting market

We recommend using the UIA data for sizing the overall market. However, ICCA data should also be taken into account as it covers only meetings that must rotate

**Inclusion criteria**
- Minimum **300 participants**
- Minimum **40% foreign** participants
- Minimum **5 nationalities** represented
- At least **3 days** duration

**Excluded from UIA data**
- National meetings
- Meetings with limited participation (e.g., subsidiary statutory bodies, committees, expert groups)
- Corporate and Incentive meetings

**Inclusion criteria**
- Minimum **50 participants**
- Meetings need to be **regularly organised**
- Meetings must **rotate** between at least 3 different countries

**Excluded from ICCA Data**
- National meetings
- Corporate meetings
- International governmental organisations

Meetings data is gathered by surveying the associations belonging to UIA

- Meetings recorded (2004): 9,160
- South Africa’s ranking (2004): 23

Meetings recorded (2005): 5,283
- South Africa’s ranking (2005): 32

- Gives a more accurate picture of the international meetings market
  - Meetings are **reported by the associations** themselves and not subject to South African non-reporting

- Gives a picture of the meetings most open to South Africa
  - Meetings **have to rotate** making them easier targets for SA to attract them

- Traditionally the measure used by SAT and others
**ICCA Meeting definitions**

**ICCA does not use the term conference in its reporting**

**ICCA has a number of criteria that need to be fulfilled in order for a meeting to be recognised**

- **International Meetings**
  - **Corporate**
    - Internal Meetings
    - External Meetings
    - In/External Meetings
    - Incentive Meetings
  - **Non-Corporate**
    - International Governmental Organisations
    - International Non-Governmental Organisations (associations)

- **Market segmented by the initiator of the meeting**

- **ICCA focuses exclusively on the Associations market**

- **Small**
  - Less than 250 participants

- **Medium**
  - Between 250 and 1000 participants

- **Large**
  - More than 1000 participants

- **Monitor defined meetings market sizes**
UIA Meeting definitions

UIA does not use the term conference in its reporting

Similarly, UIA also has a number of criteria that need to be fulfilled in order for a meeting to be recognised

- International Meetings
  - Corporate
    - Internal Meetings
    - External Meetings
    - In/External Meetings
    - Incentive Meetings
  - Non-Corporate
    - International Governmental Organisations
    - International Non-Governmental Organisations (associations)

Market segmented by the initiator of the meeting

UIA considers both IGOs and NGOS

Small
- Less than 100 participants

Medium
- Between 100 and 1000 participants

Large
- More than 1000 participants

UIA defined meetings market sizes
<table>
<thead>
<tr>
<th><strong>Business Tourism Unit - Head Office</strong></th>
<th><strong>South African Tourism</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>South Africa and Africa</strong></td>
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<tr>
<td><strong>General Manager</strong></td>
<td>Bojanala House</td>
</tr>
<tr>
<td>Business Tourism</td>
<td>90 Protea Road</td>
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<td>Chislehurston</td>
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<td></td>
<td>South Africa</td>
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<tr>
<td><strong>Business Tourism Manager</strong></td>
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<tr>
<td>Corporate &amp; Incentive</td>
<td>Call Centre: 083 123 6789</td>
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<tr>
<td><strong>Business Tourism Manager</strong></td>
<td>URL: <a href="http://www.southafrica.net">www.southafrica.net</a></td>
</tr>
<tr>
<td>Association, Government &amp; Events</td>
<td>Email: <a href="mailto:businessstourism@southafrica.net">businessstourism@southafrica.net</a></td>
</tr>
</tbody>
</table>

**ALSO ADD TRACY’S POST**
Business Tourism Manager - USA
South African Tourism
500 - 5th Avenue
20th Floor, Suite 2040
New York NY10110
United States Of America
Tel: 091 212 730 2929
Call Centre: 1 800 593 1318
## Asia and Australasia

<table>
<thead>
<tr>
<th>Business Tourism Manager - Australia</th>
<th>Country Manager – China</th>
</tr>
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<tbody>
<tr>
<td>South African Tourism</td>
<td>South African Embassy : Beijing</td>
</tr>
<tr>
<td>Suite 301</td>
<td>5 Dongzhimenwai Dajie</td>
</tr>
<tr>
<td>Level 3</td>
<td>Beijing</td>
</tr>
<tr>
<td>117 York Street</td>
<td>100600</td>
</tr>
<tr>
<td>Sydney 2000</td>
<td>China (P.R.C)</td>
</tr>
<tr>
<td>N.S.W. AUSTRALIA</td>
<td>Tel: (86) 10 653 20171</td>
</tr>
<tr>
<td>Tel: 0961 2 9261 5000</td>
<td>Call Centre: +852 8303 1229</td>
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<td>Call Centre: 1 800 238 643</td>
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<tr>
<td>44, Marker Chamber VI</td>
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<tr>
<td>Nariman Point</td>
<td>1-1-2 Moto Akasaka</td>
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<tr>
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<td>Minato-Ku</td>
</tr>
<tr>
<td>India</td>
<td>Tokyo 107-0051</td>
</tr>
<tr>
<td>Tel: 0991 22 228 28443</td>
<td>Japan</td>
</tr>
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<tr>
<td>South African Tourism</td>
</tr>
<tr>
<td>Via Mascheroni, 19</td>
</tr>
<tr>
<td>20145 Milan</td>
</tr>
<tr>
<td>Italy</td>
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<tr>
<td>Tel: 0930 02 439 117 65</td>
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<tr>
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<tr>
<td>61 Rue La Boétie</td>
</tr>
<tr>
<td>75008 Paris</td>
</tr>
<tr>
<td>France</td>
</tr>
<tr>
<td>Tel : 0933 (1) 45 61 64 41</td>
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<tbody>
<tr>
<td>South African Tourism</td>
</tr>
<tr>
<td>Friedensstr. 6-10</td>
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<tr>
<td>Frankfurt/Main</td>
</tr>
<tr>
<td>60311</td>
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<tr>
<td>Germany</td>
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<tr>
<td>Tel: 0949 (69 ) 92 91 2917</td>
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<td>Call Centre: 01805 72 2255</td>
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<th>Business Tourism Manager – Netherlands</th>
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<tr>
<td>South African Tourism</td>
</tr>
<tr>
<td>Jozef Isarélskade 48A</td>
</tr>
<tr>
<td>1072 SB Amsterdam</td>
</tr>
<tr>
<td>Tel : +31 (0) 20 471 3181</td>
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<td>Call Centre: 0900 2020 433</td>
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<table>
<thead>
<tr>
<th>Business Tourism Manager – United Kingdom</th>
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<tbody>
<tr>
<td>South African Tourism</td>
</tr>
<tr>
<td>6 Alt Grove</td>
</tr>
<tr>
<td>London</td>
</tr>
<tr>
<td>SW19 4DZ</td>
</tr>
<tr>
<td>UNITED KINGDOM</td>
</tr>
<tr>
<td>Tel : +44 (0) 208 971 9350</td>
</tr>
<tr>
<td>Call Centre: 0870 1550044</td>
</tr>
<tr>
<td>Ireland : 01 603 0996</td>
</tr>
</tbody>
</table>

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From more information contact:

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