

# LOCAL GOVERNMENT TOURISM CONFERENCE

**Sisa Ntshona**  
*CEO South African Tourism*

April 2017

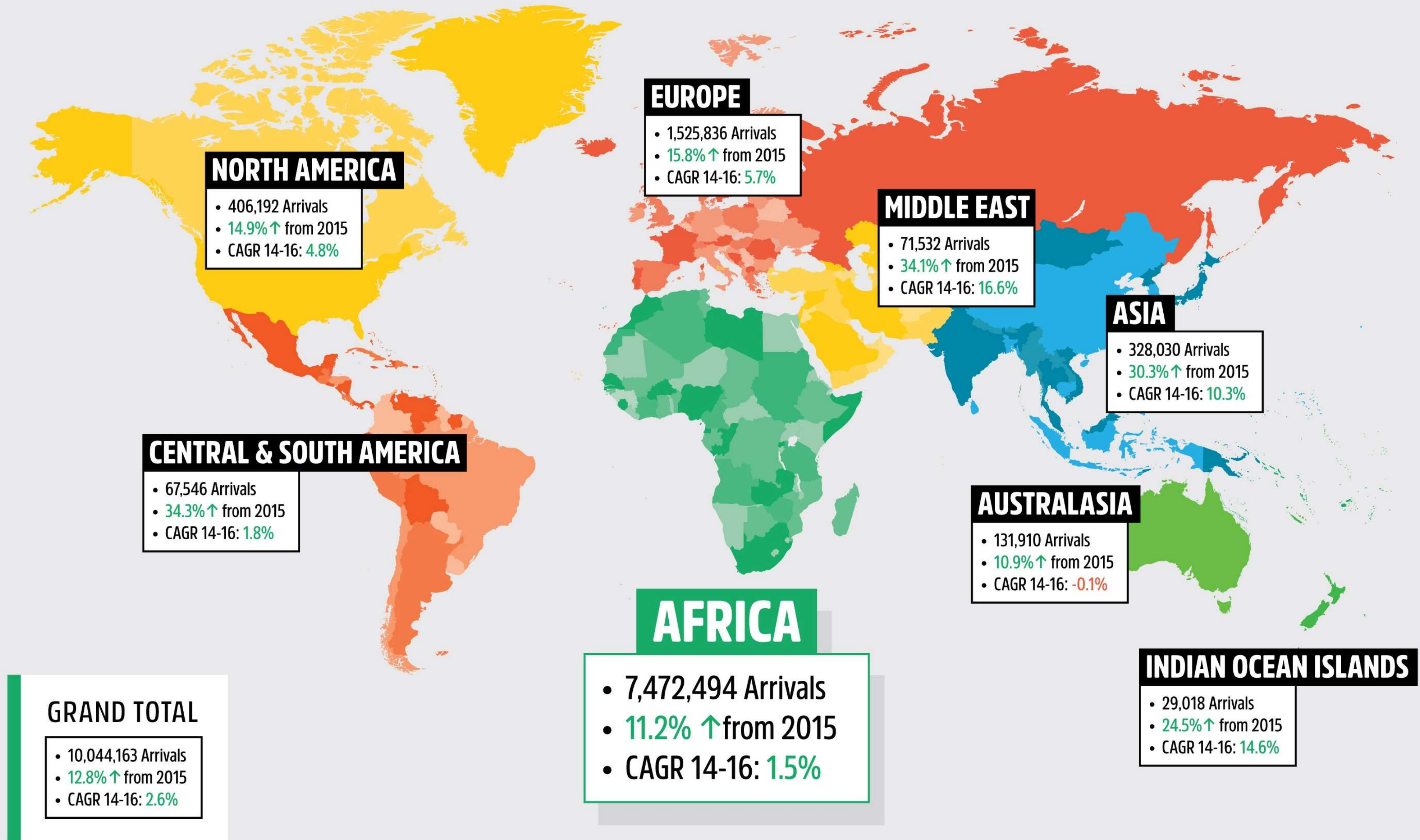


**SOUTH AFRICAN TOURISM**

# A LOOK AT GLOBAL TOURISM



# TOURISM ARRIVALS TO SOUTH AFRICA



An aerial photograph of a complex highway interchange with multiple overpasses and ramps. In the upper right, there is a large building with a prominent blue roof and an adjacent parking lot filled with cars. The overall scene is captured in a cool, blue-toned color palette.

*0.3%*  
*ECONOMIC*  
*GROWTH*

An aerial photograph of a city skyline at sunset. The sun is low on the horizon, casting a golden glow over the buildings. The sky is a mix of blue and orange. The city is densely packed with buildings of various heights and styles. In the foreground, there are several large, multi-story buildings. In the background, a tall tower is visible on the left side. The overall scene is a mix of modern and older architecture.

***SOUTH AFRICA ECONOMIC STATUS***  
***INEQUALITY AMONG THE HIGHEST IN THE WORLD***  
***INTEREST RATE AND INFLATION: ON THE RISE***  
***RATINGS: LOW- JUST ABOVE JUNK STATUS***

An aerial photograph of a city skyline at sunset. The sun is low on the horizon, casting a golden glow over the buildings. The sky is a mix of blue and orange. The city is densely packed with buildings of various heights and styles. The text is overlaid in the lower center of the image.

***CONTRIBUTED  
3% TO THE GDP IN 2016***



# LEISURE TOURISM



# BUSINESS TOURISM



# QUALITY ASSURANCE

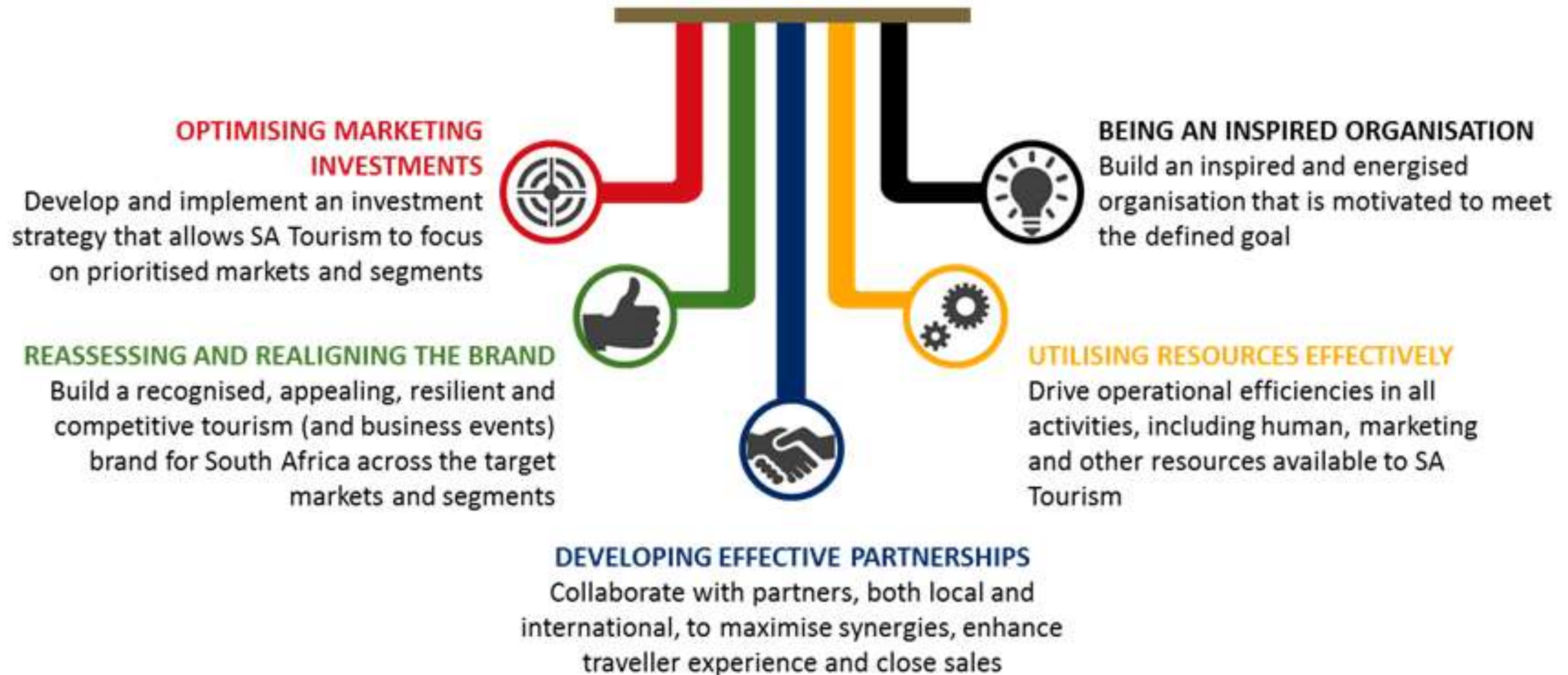


# INSIGHTS & ANALYTICS

## 5 IN 5 STRATEGY

# (5 MILLION MORE TOURISTS INCREMENTALLY OVER 5 YEARS)

### THRUSTS TO MEET THE GOAL

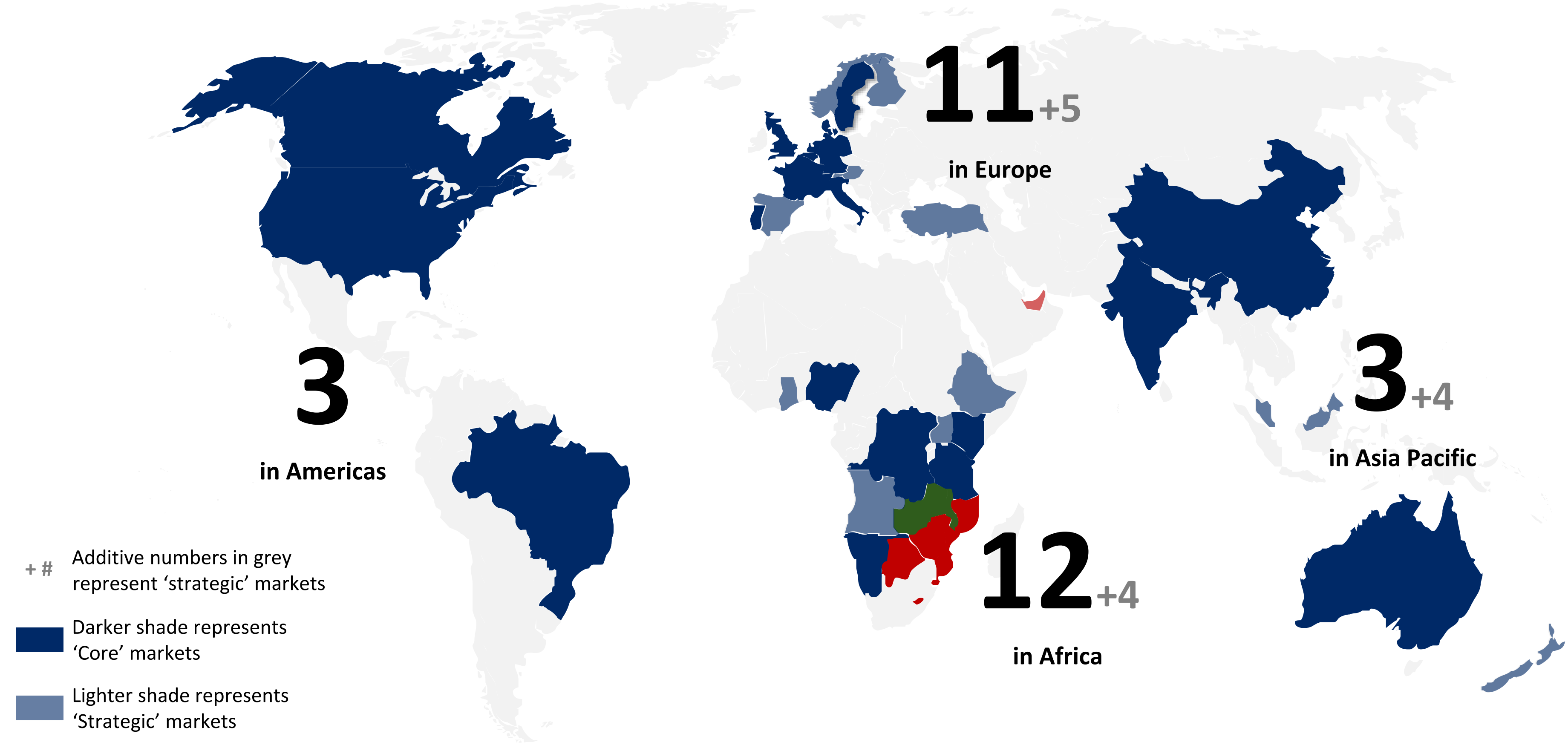


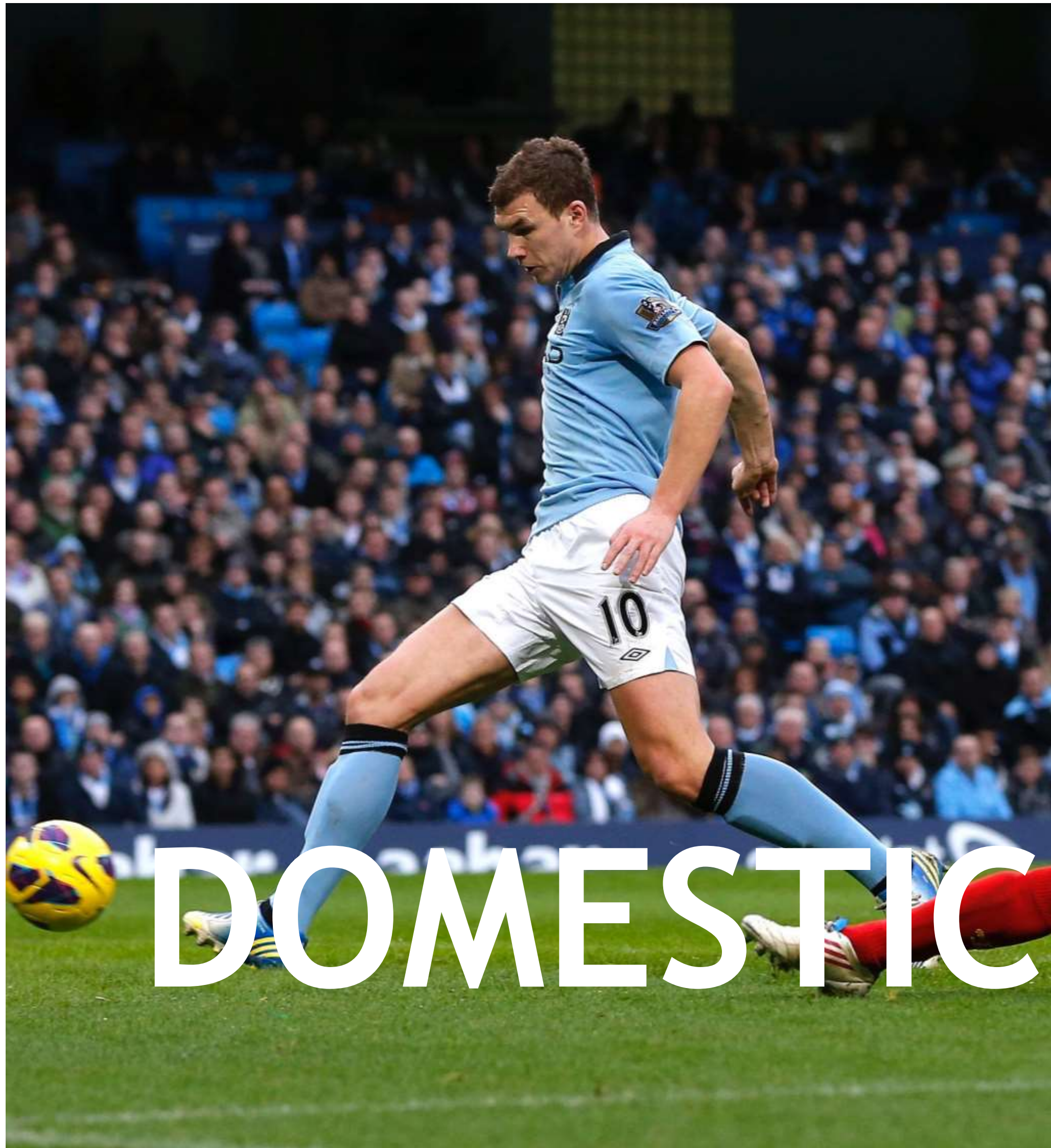


# NEW OPERATING MODEL

## Marketing Investment Framework

The priority list from the investment framework is based on market's tourism potential, South Africa's ability to win in the market, the cost of acquisition of tourist from the market





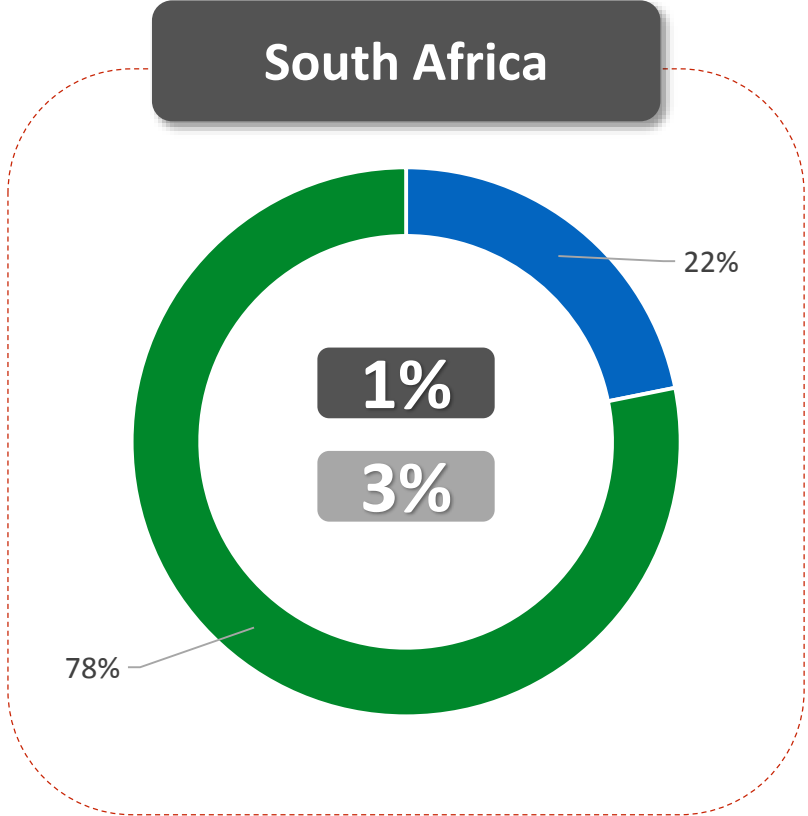
# DOMESTIC TOURISM

## CASE STUDY: FRANCE

- Tourist arrivals (France): 85 mill.+
- Population (France): 66 mill.
  - ✦ Population (Paris): 2.2 mill.
- Paris tourist arrivals down due to terror, but France is still world's no. 1 destination
  - ✦ Paris saw a drop of 1.5 million tourists in 2016, as fears linked to terror attacks scared off visitors, especially from China and Japan
- Contribution to GDP: 3.6% - almost in line with SA
- Contribution to Employment: 4.1% of total employment – slightly below SA (4.5%)

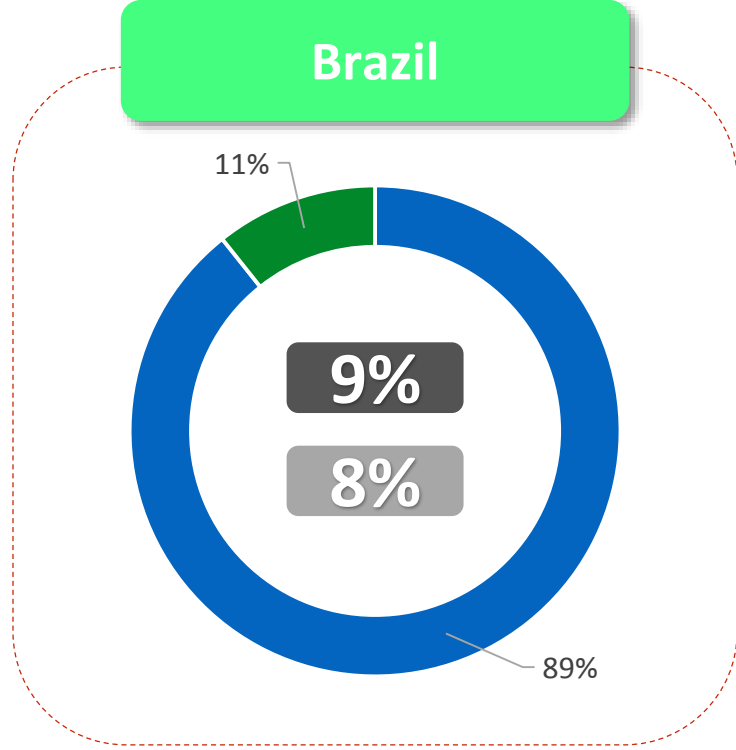
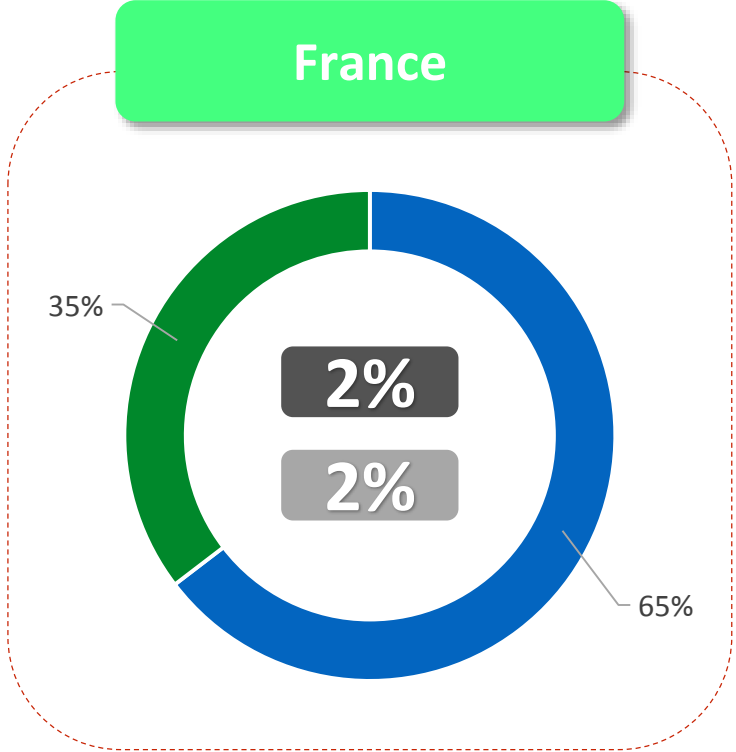
# COMPARISON OF SA TO FRANCE & BRAZIL

South Africa vs. Benchmark Countries  
Spending, 2014



- Inbound Receipts
- Domestic Receipts

	CAGR 2009-14	Trip Spending
Domestic	X%	
Inbound	X%	



Source: 'Travel in Australia', Oct 15, Euromonitor International; 'Travel in South Africa', Sep 15, Euromonitor International; 'Travel in France', Oct 15, Euromonitor International; 'Travel in Spain', Sep 15, Euromonitor International; 'Travel in The United Kingdom', Sep 15, Euromonitor International; 'Travel in India', Sep 15, Euromonitor International; 'Travel in Brazil', Sep 15, Euromonitor International

# HOW DO WE GET PEOPLE TO AFRICA

# 1

# 2 HOW DO WE BUILD A TOURISM ECONOMY



# ***#1 TRAVEL TREND FOR 2017: TRANSFORMATIONAL TRAVEL***

