



FNB Solutions for Tourism Businesses

Tourism 2010 & Beyond

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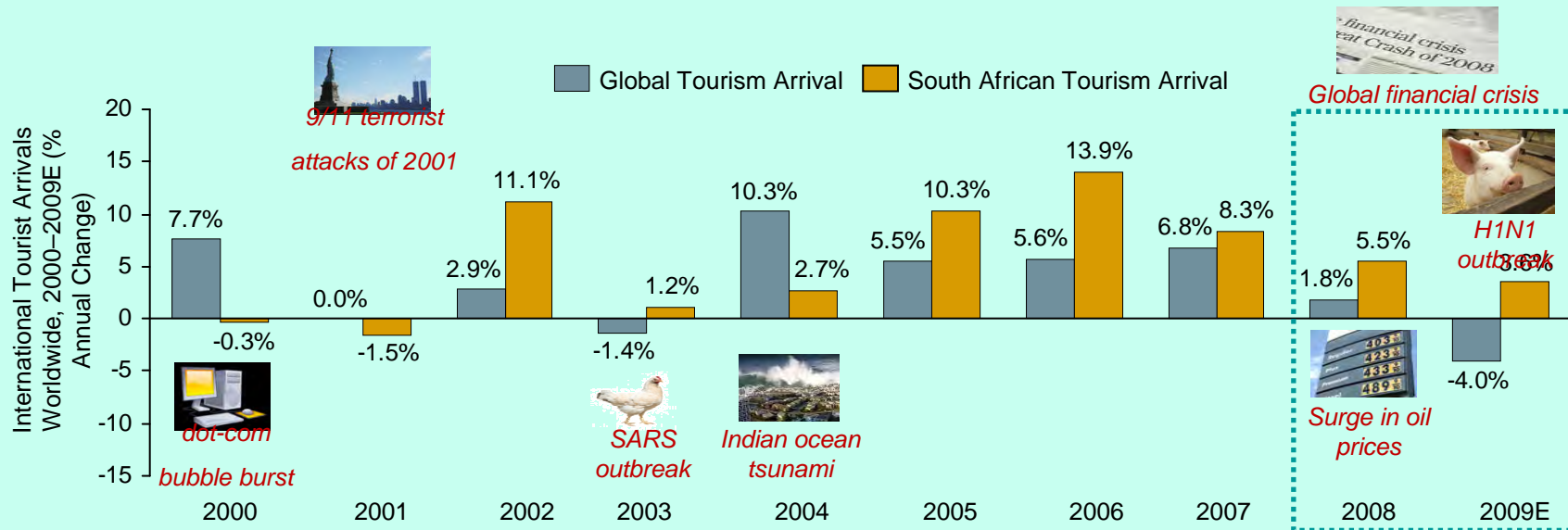


Status of the Tourism Industry

The past 10 years have been a rough ride for the global tourism industry

Impact of Global Events

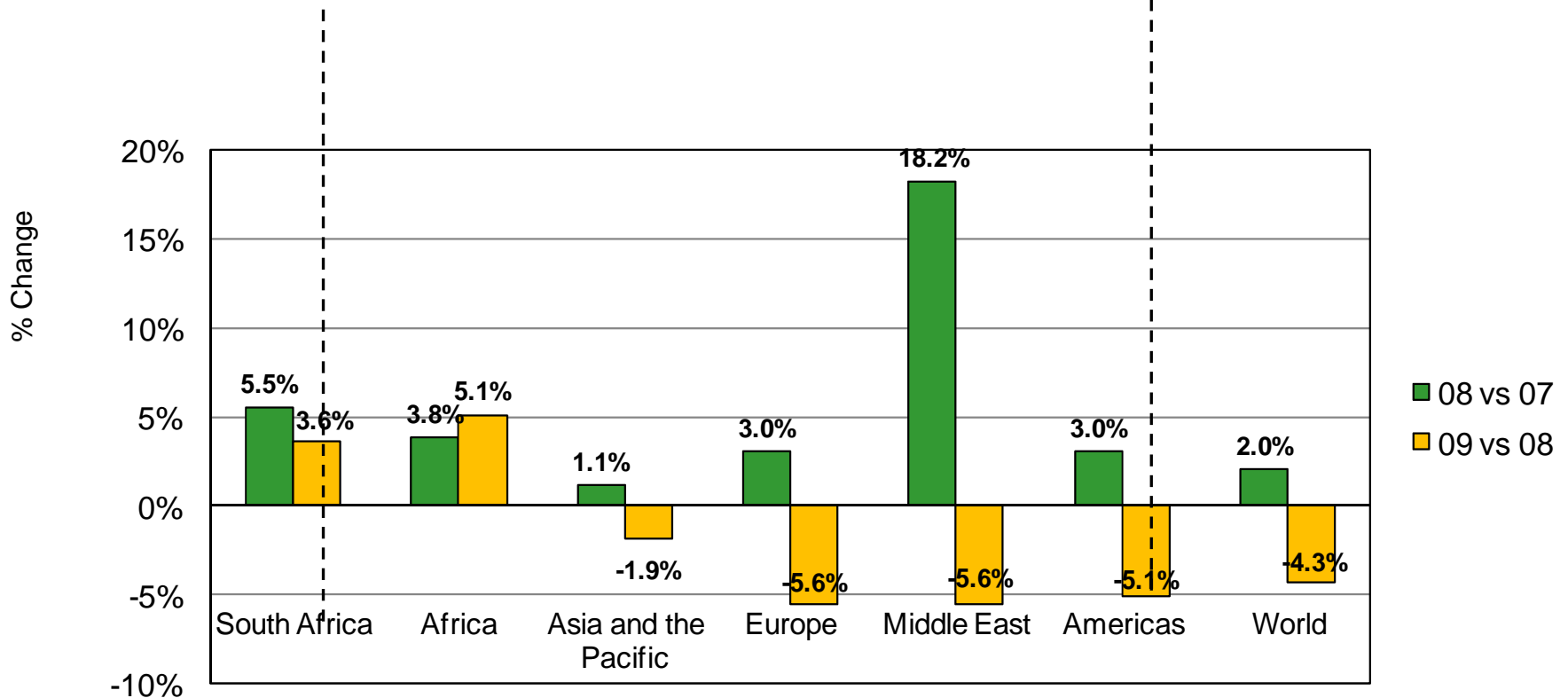
The growth in the global tourism industry is volatile, as the industry is highly susceptible to external factors. While globally, the consumer demand has considerably fallen due to recent events, South Africa has shown better growth in tourists arrivals than the world average



- Of all the global events, the economic crisis had the most pronounced effect on the tourism industry
- According to the UNWTO World Tourism Barometer report, across the globe, most regions registered a decline in tourists arrivals during the first eight months of 2009, including Europe (-8%), the Middle East (-8%), the Americas (-7%), and the Asia Pacific (-5%). Africa was the only region to record a 4% increase in arrivals
- Additionally, other natural events also affect the number of tourist arrivals. For e.g. The tourist arrivals to China reduced by ~50% in May 2008, due to Sichuan earthquake that killed more than 70,000 people in the country

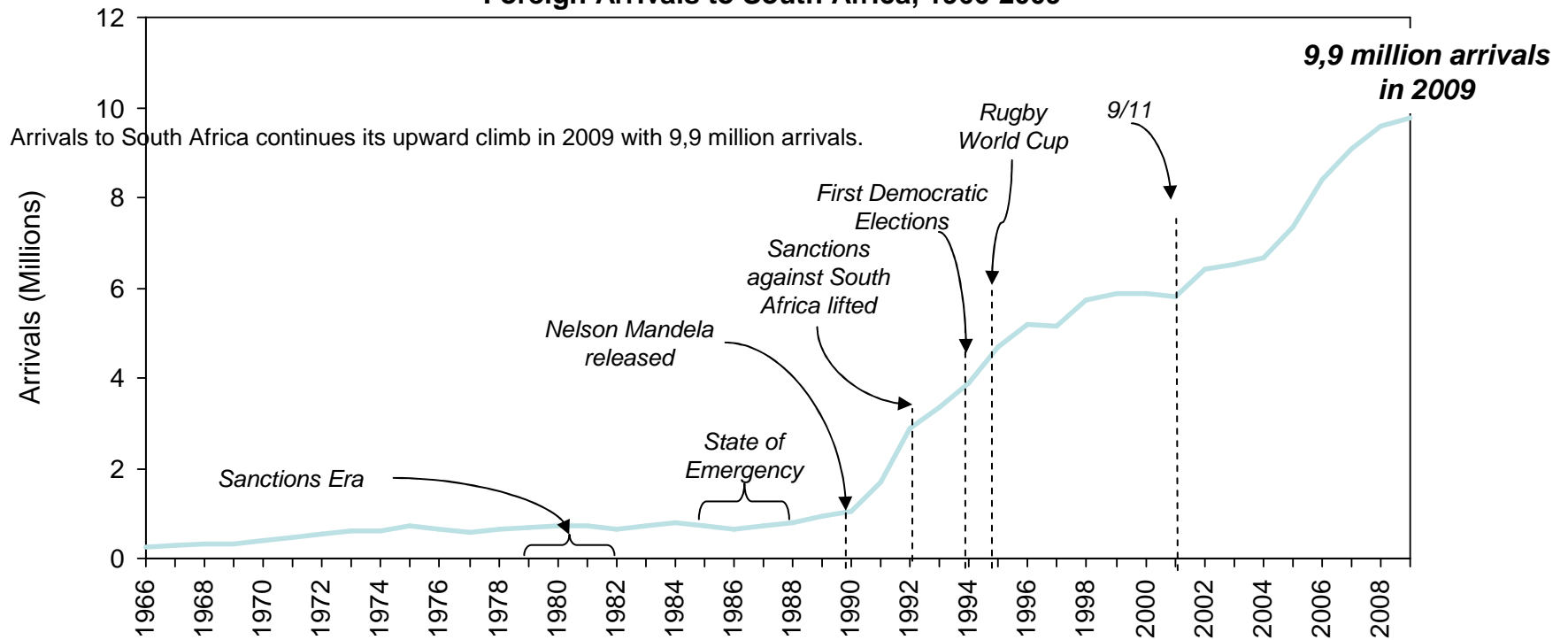
South Africa did outperform global tourism growth. Global arrivals decreased by 4% in 2009 while arrivals to South Africa grew by 3.6%

Year-on-Year Change in Foreign Arrivals to each region



2008 Arrivals (Millions)	9.6	45.7	184.1	487.1	55.6	147.1	920
2009 Arrivals (Millions)	9.9	48.1	180.5	459.7	52.5	139.6	880

Foreign Arrivals to South Africa, 1966-2009



1970s and 80s – Stagnation

- Stagnation drove low investment, focus on narrow white domestic market and costs

1990-1998 – Growth

- Initial period of short-term profit-taking followed by period of investment growth and entry of foreign players

1998-2004 – Cyclicity

- Global events, currency volatility drove uncertainty and short-term strategy by firms
- Investment rates remain weak overall



2010

Overview of tickets sales

- in total 2 million tickets have been sold (that's 2 thirds of the total inventory), 1,232,000 through public sales, the rest through tour operators, participating federations, via the hospitality programme or to commercial affiliates;
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- SA 1.1m approx
- USA 127 000
- UK 96 000
- Germany 38 000
- Australia 41 000
- Canada 15,106
- Japan 21 000
- Mexico 26 000
- Brazil 19 000
- Figures from rest of Africa still small and not available yet.

TEAM BASE CAMP INFO

Province	No. of Teams
Gauteng	19
Kwazulu Natal	5
North West	3
Western Cape	3
Mpumalanga	1
Northern Cape	1
Eastern Cape	0
Limpopo	0
Free State	0
Total	32

Accommodation database

- **Verification**

- ✓ Establishments: **18 882** (8,364 graded)
- ✓ Rooms: **202 712** (113,294)
- ✓ Eliminated duplicates and non-accommodation establishments;
- ✓ Received & incorporated updated databases from provinces;
- ✓ Received & incorporated database received from Match;
- ✓ Included TGCSA's database;
- ✓ In principle agreement on the 'basic database' with industry.

Outside South Africa - inventory overview by Country

Linked town/general area	Rooms on 15 th June 2010	Total Room Nights
Botswana	59	1,947
Lesotho	39	1,287
Mauritius	0	0
Namibia	193	5,419
Swaziland	229	7,556
Zambia	60	1,980
Zimbabwe	70	2,590
Totals	650	20,779

Information

- GIS information on products and services available on www.tourism.gov.za
- Audit of visitor information centers completed, there are 351 Visitors Information centers in the country
- Lack of gateway information centers (**fan embassies**) with National information (to be addressed working with ACSA)
- Developing a national “2010 companion” handout to all visitors - (beyond 90 min experience - working with provinces)
- Completion of five Visitor Information Centres (Mbombela, Polokwane, Mangaung, Nelson Mandela Metro and Rustenburg)

Call Center

- The number is **+27 87 803 INFO or (4636)**
- Launched 08 December 2009
- It provides information on accommodation, attractions, activities, routes, experience, services and restaurants
- Emergency numbers are also available on request
- In the following languages (Portuguese, Spanish, **German, English, French, Dutch**)

- Currently the centre operates 24/7 in English
- Other languages 09am - 09pm
- Leading to event will be 24/7 in all languages
- Current capacity 1,000 calls a week and later 10,000 calls a week (**01 April**)
- 01 March - Contact Centre Campaign begins - more demand to be generated
- ***Provinces and host cities are invited to linkup their call centres with the contact centre for after hours and overflow provisions***



FNB Tourism



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- Thursday Media Launch?

Contact us!

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