SOUTH AFRICAN TOURISM

CALL FOR APPLICATIONS

SOUTH AFRICA MARKET ACCESS B2B MULTI-CITY TRADE ENGAGEMENTS

12 - 22 January 2027 · 8 cities across the Netherlands, Belgium and Germany

DATES	MARKETS	PARTICIPATION	APPLICATIONS CLOSE
12-22 Jan 2027	NL · BE · DE	R72 000	01 October 2026

South African Tourism's North and Central Europe Hubs invite South African tourism businesses — SMMEs, accommodation and experience suppliers, destination marketing organisations (DMOs) and destination management companies (DMCs) — to apply to take part in the South Africa Market Access Business to Business (B2B) Multi-City Trade Engagements, taking place from 12 to 22 January 2027 across the Netherlands, Belgium and Germany.

Objective

The objective of these B2B multi-city trade engagements is to contribute to the growth of arrivals from the Netherlands, Belgium and Germany to South Africa. Trade partners in these markets are key distribution channel levers that South African Tourism relies on to bring arrivals and assist in the acquisition of new customers for the destination. Equipping the travel trade with product knowledge and new, differentiated experiences that they can package is a pivotal requirement.

A secondary objective of these engagements is to provide market access for the South African travel trade value chain (product owners) to Dutch, Belgian and German buyers (tour operators and travel agents). This will be achieved by demonstrating to trade currently selling South Africa that there is ample opportunity beyond the high-price, high-value packages historically sold, while educating them on differentiated product and packaging opportunities. South African Tourism will collaborate with qualified South African trade and suppliers to accompany the North and Central Europe Hubs in presenting the very best of what South Africa has to offer.

What this document provides to assist you in compiling your application

- A summary of consumer insights, arrivals and spend results
- Our key experience pillars — the brand attributes used to market the destination
- A high-level programme and the cities to be visited
- Costs of participation and inclusions
- Instructions for applications from product, accommodation and experience suppliers and destination marketing organisations, and separate instructions for DMC applications, as these application processes differ

NORTH EUROPE MARKET INSIGHTS

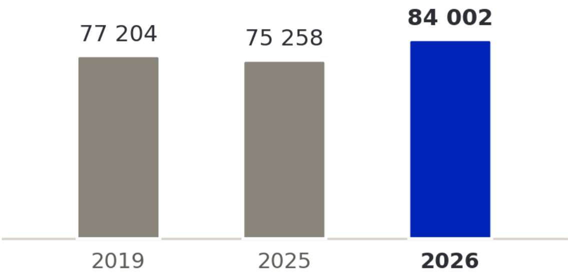
As a team leading growth and new customer acquisition out of North Europe, South African Tourism prides itself on decision-making led by sound insights, data and research. The consumer set that holds the most potential for volume and value for the North European region is central to all decision-making undertaken by the hub. Below is a summary of the most recent insights available to the hub, drawn from the Netherlands, our largest market in the North Europe hub, and used to guide engagement across the region, including our newest market, Germany:

- The total outbound long-haul untapped consumer opportunity for the Netherlands is 9.42 million consumers. Of this number, 53% are aware of South Africa and 25% are positive about South Africa as a destination.
- Beautiful scenery, wildlife and safari, experiencing a different culture, and adventure are the main reasons travellers give for visiting South Africa.
- Sustainability and responsible tourism are key considerations in travel decision-making, particularly (though no longer exclusively) among younger cohorts. Responsible tourism is therefore an important part of the South African product landscape that the hub aims to expose Dutch, Belgian and German trade to through these engagements.
- Total tourism foreign direct spend (TTFDS) has averaged ZAR 21 559 per traveller for the Netherlands and ZAR 17 986 per traveller for Belgium. These figures highlight both the value travellers from these markets provide and the need for differentiated packages and price points, as South Africa is currently seen as a high-cost destination based on packages on offer.
- Travellers from the region are split roughly 49% repeaters and 51% first-timers, underscoring the need for both classic itineraries (for first-timers) and new, off-the-beaten-track experiences (for repeat visitors).
- The Netherlands remains South Africa's third-largest international source market out of Europe and fourth-largest source market internationally, behind the UK, the USA and Germany — reinforcing the strategic value of extending market access engagements into Germany.

These insights reflect consistent efforts by the North Europe team to position South Africa as a welcoming, responsible tourism destination, and to showcase experiences aligned with the intrepid, green-economy-conscious and wanderlusting consumer segments the hub targets across the Netherlands and Belgium.

Netherlands

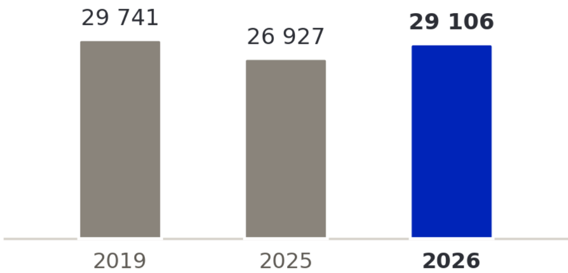
Tourist arrivals to South Africa, January to July



+8.8% vs 2019 · +11.6% vs 2025

Belgium

Tourist arrivals to South Africa, January to July



−2.1% vs 2019 · +8.1% vs 2025

INSIGHT

The Netherlands is the best recovering market in Europe, closing at 97% of 2019 arrivals in 2025 and projected to close at 104% in 2026, supported by KLM's increased seat capacity (+15% vs 2019). A 52% Netherlands repeater rate indicates trust and familiarity that can be leveraged, and being one of only two markets to visit all 9 provinces in 2024 reflects Dutch travellers' willingness to explore.

INSIGHT

Safety and security concerns are a big deterrent at two critical points in the conversion curve; advocacy is needed to remedy this. Wildlife ownership should continue to be amplified, while improved scores on welcoming people reflect the success of putting locals at the centre of campaigns over the past four years.

AVIATION OVERVIEW — NETHERLANDS

FORWARD OUTLOOK

DIRECT CAPACITY NL-SA

- KLM accounts for 100% of direct capacity, on 11× weekly AMS-CPT and 7× weekly AMS-JNB
- 2019: approx. 258 900 seats · 2025: 289 943 seats (+11%) · 2026: 305 067 seats (+15% vs 2019)

INDICATIVE FARES (EUR, ONE-WAY / RETURN)

- KLM, the only direct carrier: 790 / 1 580
- Air France 562 / 1 124 · Lufthansa 760 / 1 520 · British Airways 391 / 782
- Emirates 385 / 770 · Kenya Airways 355 / 710 · Etihad 337 / 674 · Qatar 324 / 648 · Turkish 287 / 574
- Market average (carriers shown): 478 / 956

TOTAL OUTBOUND

- Oxford Economics forecast: South Africa +15.4% from the Netherlands in 2026, against Dutch total outbound of +5.0%
- Jan-May 2026 actual +10.8% — tracking behind forecast
- Competing destinations forecast strong Dutch growth: China, Indonesia, Kenya
- Dutch long-haul air tax €30 → €72 in 2027 (+140%), the highest such tax
- Two-thirds of Dutch travellers fear flying becoming unaffordable; affordability is one of only two meta-perception attributes below the all-destination average
- AF-KLM is building winter 26/27 capacity to the Indian Ocean and Caribbean; Schiphol is set to become the second most expensive airport in Europe as it raises fees by 41%

INSIGHT

Capacity is growing but risks diminishing returns due to KLM's monopoly on direct access. Prices continue to rise (EUR 1 580 return, 65% above market average), indicating sufficient demand. However, the Dutch are price-sensitive and may opt for short-haul. Turkish, Qatar and Emirates remain workable one-stop partner options. Price is a leakage point between plan to visit and visited within 24 months.

INSIGHT

Unaffordability of flights due to rising costs, coupled with competitors gaining both airlift capacity during South Africa's high season (the Dutch winter) and arrivals growth, poses a risk to South African growth and requires deliberate action on both airlift and pricing.

Sources: South African Tourism North Europe Hub — brand tracker and departure survey; Statistics South Africa Tourist Arrivals Table B; airline capacity and fare monitoring.

CENTRAL EUROPE MARKET INSIGHTS

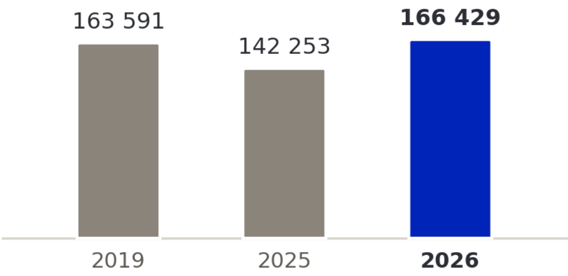
Germany is South Africa's second-largest source market out of Europe and third-largest overseas market. The insights below are drawn from South African Tourism's brand tracker and departure survey work in the market, Statistics South Africa arrivals data, and seat capacity and fare monitoring across the Central European carriers. They are provided to help applicants shape a proposition that speaks to what German buyers and travellers are actually asking for:

- Germany delivered 290 795 arrivals in 2025, up 14.0% on the 254 992 recorded in 2024. It is South Africa's second-largest source market in Europe after the United Kingdom, and third-largest internationally after the United Kingdom and the United States.
- Growth has continued into 2026. Arrivals for January to July 2026 reached 166 429, 17.0% ahead of the same period in 2025 (142 253) and 1.7% ahead of the same period in 2019 (163 591) — meaning Germany has now recovered beyond its pre-pandemic arrival levels on a year-to-date basis. The hub's working projections are 310 225 arrivals for 2026/27 and 329 615 for 2027/28.
- Total tourism foreign direct spend from Germany was R6.8 billion in 2025, against R5.4 billion in 2024 and R6.3 billion in 2023. The hub's assessment is that spend has not yet returned to 2023 levels in value terms, so growth in arrivals is currently running ahead of growth in value. Differentiated product at a range of price points, rather than volume alone, is therefore the priority for this market.
- Responsible travel, flexibility and authentic experiences led German travel trends in 2025, and German travellers show a clear preference for smaller, lesser-known areas away from established tourist concentrations. Value for money remains the decisive factor at the point of booking.
- South Africa holds leadership positions on breathtaking and wildlife experience, and scores above average on enriching, adventurous and wide variety of experiences. The defined barriers are safety and security, the cost of getting to South Africa, and another destination being more appealing. The 2025 closure ratio of 1 in 1.29 shows that travellers who plan a trip to South Africa largely go on to take it, so the opportunity lies in widening consideration rather than in converting existing intent.
- The German distribution landscape has no single dominant operator. South Africa's position in the market rests on a large base of medium-sized and smaller tour operators, which is precisely why these engagements are structured as multi-city B2B sessions rather than a single central event.
- Scheduled seat capacity from Germany for August 2026 to June 2027 stands at 240 927 seats across Lufthansa (172 097, +22.7%) and Condor (68 830, +9.9%), over seven active routes into South Africa. That remains 23% below the 311 799 seats available in 2019, and average 2026 fares sit at approximately €1 300. Capacity is growing but still constrained, and with higher fuel and operating costs being passed on to passengers and Middle East disruption shifting demand towards European carriers, fares are likely to stay firm into the 2026/27 season.

The consistent message from this market is that German travellers will trim other spending before they give up a holiday, and that they are willing to pay more for a land arrangement that meets their personal needs — though not necessarily for the flight that gets them there. Applicants presenting to German buyers should therefore be prepared to speak to well-priced, differentiated land product, to regions and experiences beyond the established routes, and to the responsible-tourism credentials that increasingly inform German travel decisions.

Germany

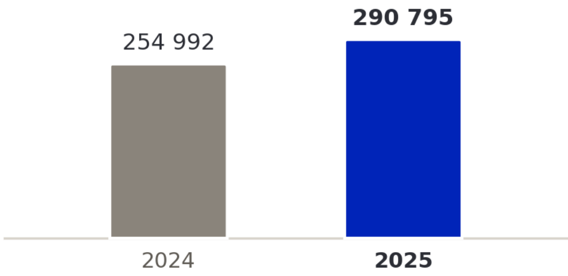
Tourist arrivals to South Africa, January to July



+1.7% vs 2019 · +17.0% vs 2025

Germany

Tourist arrivals to South Africa, full year



+14.0% vs 2024

AVIATION OVERVIEW — GERMANY

FORWARD OUTLOOK

SEAT CAPACITY AUG '26 - JUN '27

- Lufthansa: 172 097 (+22.7%) · Condor: 68 830 (+9.9%) · Total: 240 927
- 7 active routes into South Africa
- 2019 capacity: 311 799 — current capacity is 23% below 2019
- Average fare 2026: approximately €1 300

FORWARD OUTLOOK

- Higher fuel and operating costs are being passed on to passengers
- Strong demand for South Africa, especially in the European winter, supporting higher fares
- Limited competitive capacity: Middle East disruption is shifting demand to European carriers
- Travellers prefer to save budget elsewhere before they give up on a holiday
- Consumers are prepared to pay more for a land arrangement that meets their personal needs, though not necessarily for the flight

INSIGHT

Germany is a big driver in terms of arrivals, and seat capacity into the coming season is up across the Central European carriers, led by Lufthansa. Spend, however, has not yet returned to 2023 levels.

INSIGHT

Travellers want authentic, less crowded experiences, but value for money still decides the final booking. Cost pressure and shifting competitor capacity will shape fares and seat availability into 2026/27: the customer is willing to pay more for a personal holiday experience, but not necessarily for the flight.

Sources: South African Tourism Central Europe Hub — brand tracker and departure survey; Statistics South Africa Tourist Arrivals Table B; airline capacity and fare monitoring.

KEY EXPERIENCE PILLARS

These are the brand attributes used to market the destination across both hubs. Your application should state clearly which pillar or pillars your business speaks to.

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

Engagement Details and Itinerary

South African Tourism will take a group of participating businesses on B2B multi-city trade engagements across the Netherlands, Belgium and Germany, covering 8 cities in total, running from 12 to 22 January 2027.

4 cities **NETHERLANDS** Utrecht · Haarlem · Rotterdam · Amsterdam	**2 cities** **BELGIUM** Brussels · Antwerp	**2 cities** **GERMANY** Düsseldorf · Frankfurt

Participation Costs

B2B MULTI-CITY TRADE EVENTS **R72 000.00** per business in total	VAKANTIEBEURS + B2B TRADE EVENTS **R125 000.00** still subject to approval and confirmation of attendance after scoring

The participation fee is expected to cover the below inclusions on a per-business basis, with a maximum of 2 representatives per business, at one table.

THIS RATE INCLUDES

- Accommodation on a bed and breakfast basis for the duration of the engagements
- 2 representatives per business, at one table
- Transport between engagement cities
- Workshop participation costs
- Welcome and farewell dinner
- A light snack or dinner on workshop days

THIS RATE EXCLUDES

- Accommodation and transfers for Vakantiebeurs (if applying for both — please refer to the Vakantiebeurs application instructions)
- All international flights
- Room nights outside of the confirmed engagement dates
- All meals not listed alongside
- Tipping, bar charges and room service
- Hotel hold deposits
- Incidentals and costs for own account
- Visa fees and travel insurance

APPLICATION INSTRUCTIONS

Product, accommodation and experience suppliers, and DMOs

Please note: DMCs should follow the separate DMC application process in the section that follows.

1. Submit a 300-word profile of your business highlighting: the key experience pillar or pillars your business falls into; the consumer segments your business normally appeals to; your current customer base; current tourism network affiliations, if applicable; the province in which you are based; and any other information you consider relevant.
2. Submit a top-line marketing plan (no more than 1 page) setting out how you would market yourself to potential trade partners in this region, using the insights provided in this document. Include your strategic objective, pricing strategy and any other relevant detail.

SCORECARD

Each criterion is scored from 0 to 3 — 3 excellent, 2 acceptable, 1 some requirements met, 0 no submission in the category or minimum requirements not met — and then weighted as shown below.

CRITERION	WEIGHTING
Diversity and uniqueness of experiences (linked to the key experience pillars)	**30%**
Quality of the marketing strategy compiled	**30%**
Alignment with consumer needs in the region, as detailed above	**30%**
Responsible tourism opportunities highlighted, where applicable	**10%**

Everyone is welcome to apply. Where more applications are received than places available, preference will be given to suppliers who have not participated in a previous edition of the B2B multi-city engagements.

DMC APPLICATION PROCESS

Limited DMC places are available, and preference will be given to DMCs who have not participated previously.

1. Indicate the provinces in which your business currently sells packages.
2. Present two different itineraries that could be packaged incorporating the consumer insights detailed above — one for repeat visitors and one for first-time visitors. Both should align with the consumer insights above, and specifically answer:
   - What itinerary would you showcase to a first-timer wanting to see the classics, aligned with the key experience pillars provided above?
   - What itinerary would you showcase to a repeat visitor, aligned with the key experience pillars provided above?

Scoring will be awarded in accordance with the matrix below. Suppliers who score highest will be selected. In the event of tied scores, preference will be given to first-time attendees and those who were declined for the 2026 edition.

Score 3	Score 2	Score 1	Score 0
Excellent	Acceptable	Some requirements met	No submission in the category, or minimum requirements not met

REQUIREMENT	SCORE	WEIGHTING
Number of provinces reflected in existing packages, with proof provided	**3:** 7-9 provinces included in packages **2:** 4-6 provinces included in packages **1:** 2-3 provinces included in packages **0:** only 1 province covered (this would not qualify as a DMC)	**30%**
Incorporation of SMMEs and community tourism suppliers reflected in the itineraries (supplier names to be included as proof)	**3:** 40%+ of itinerary includes SMME or community tourism businesses **2:** 30-39% of itinerary includes SMME or community tourism businesses **1:** 10-29% of itinerary includes SMME or community tourism businesses **0:** SMME incorporation not clearly shown, or less than 10% of itinerary	**30%**
Two itineraries reflecting first-timer versus repeater experiences, aligned with consumer insights, with a marketing strategy compiled for each	Requirements: first-timer itinerary · repeater itinerary · marketing strategy compiled for the three markets **3:** all 3 submitted, clearly reflecting alignment to consumer insights **2:** only 2 of 3 submitted, clearly reflecting alignment **1:** only 1 of 3 submitted, clearly reflecting alignment **0:** none of the 3 submitted, or no clear reflection of alignment to consumer insights for the outlined markets	**30%**

REQUIREMENT	SCORE	WEIGHTING
Whether the DMC is leisure-focused rather than business or incentive-focused, and whether the company is South African owned	**3:** both requirements met — leisure focused and South African owned **2:** 1 of 2 requirements met **1:** neither requirement met, but the DMC can prove activity in any of the 3 markets **0:** no requirements met and the DMC has not been active in the markets	**10%**

Only a limited number of DMCs will be accepted; the final number will be confirmed to applicants.

HOW TO APPLY

Please email your completed application to netrade@southafrica.net by the closing date and time below. Stakeholders are encouraged to apply as soon as possible to ensure they are guaranteed a place and are included in any pre-engagement marketing.

CLOSING DATE AND TIME	SEND APPLICATIONS TO	QUESTIONS PERTAINING TO APPLICATION CRITERIA:
01 October 2026 **17:00 (SAST)** **No late applications will be considered**	**netrade@southafrica.net**	**Abby Jacobs** **abby@southafrica.net**

Kind regards,

North and Central Europe Hub teams