

Table 9.1: Market Segment Attractiveness

Foreign Market Segments		Buffalo City Inbound 2002	South Africa Inbound 2002	South Africa Inbound Growth 2002/01	Buffalo City Penetration of South Africa Inbound	Spend per day Buffalo City	Length of Stay estimate (Nights)	Ratings												
								Market Size (1-10)	Market Growth (1-10)	Buffalo City Market Penetration (1-5)	Market Profitability (1-5)	Rise of Competitors (1-5)	Negotiating Power (1-5)	Substitutes (1-5)	Buffalo City Product Attractiveness (1-10)	Overall Rating	Overall Rank			
Germany		30 450	249 542	25.0%	12.2%		2.2													
Germany	Organised Tours					1194		5	7	3	4	2	2	1	7	31	6			
Germany	FIT's					1217		7	7	3	4	2	2	1	7	33	3			
Germany	VFR					780		3	7	3	4	2	2	1	7	29	10			
UK		23 100	443 817	27.8%	5.2%		2.2													
UK	Organised Tours					1288		6	8	2	4	2	2	1	7	32	5			
UK	FIT's					1353		8	8	2	4	2	2	1	7	34	1			
UK	VFR					811		4	8	2	4	2	2	1	7	30	8			
Backpackers		7 230					4.0	3	6	3	4	2	2	1	8	29	10			
Cruises		1 560					1.0	1	9	1	5	2	2	1	4	25	30			
USA African American/ Scandanav		6 300	183 424	9.6%	3.4%	1890		2.2	5	6	1	4	2	2	1	8	29	10		
Foreign Special Interest		1 050						3.0	2	7	1	3	2	2	1	7	25	30		
Domestic Market Segments		Buffalo City Inbound 2002	Provincial Outbound		Penetration of Provincial Outbound	Spend per day Buffalo City	Length of Stay estimate (Nights)													
Eastern Cape excluding VFR		140 010	1 348 948		10.4%															
Eastern Cape	Day Visitors		4 805 817			37	-	7	6	3	3	4	1	4	6	34	1			
Eastern Cape	City Break					85	1.5	6	5	3	3	4	1	4	4	30	8			
Eastern Cape	Holiday	140 010	757 416		18.5%	90	7.0	6	5	4	3	3	3	3	4	31	6			
Weekend Break (Black mid market)						110	1.5	6	8	2	4	2	2	2	7	33	3			
Domestic VFR		375 000	19 610 728		1.9%	35	7.0	9	6	2	1	1	2	1	5	27	15			
Western Cape Holiday		57 440	1 377 120		4.2%	90	5.0													
WC African	Low Income							1	2	2	2	2	2	2	6	19	51			
WC African	Medium Income							1	2	2	3	2	2	1	5	18	53			
WC African	High Income							1	4	2	4	1	2	1	4	19	51			
WC White	Low Income							6	2	2	2	2	2	2	6	24	33			
WC White	Medium Income							7	4	2	3	2	2	1	5	26	21			
WC White	High Income							8	6	2	4	1	2	1	4	28	14			
WC Other Income and Racial Groups								4	6	2	3	2	2	2	6	27	15			
KwaZulu-Natal Holiday		53 850	826 272		6.5%	90	5.0													
KZN African	Low Income							6	2	2	2	2	2	2	6	24	33			
KZN African	Medium Income							7	2	2	3	2	2	1	5	24	33			
KZN African	High Income							8	4	2	4	1	2	1	4	26	21			
KZN White	Low Income							4	2	2	2	2	2	2	6	22	46			
KZN White	Medium Income							5	4	2	3	2	2	1	5	24	33			
KZN White	High Income							6	6	2	4	1	2	1	4	26	21			
KZN Other Income and Racial Groups								4	6	2	3	2	2	2	6	27	15			
Free State Holiday		32 310	344 280		9.4%	90	5.0													
FS African	Low Income							6	2	2	2	2	2	2	6	24	33			
FS African	Medium Income							7	2	2	3	2	2	1	5	24	33			
FS African	High Income							8	4	2	4	1	2	1	4	26	21			
FS White	Low Income							4	2	2	2	2	2	2	6	22	46			
FS White	Medium Income							5	4	2	3	2	2	1	5	24	33			
FS White	High Income							6	6	2	4	1	2	1	4	26	21			
FS Other Income and Racial Groups								4	6	2	3	2	2	2	6	27	15			
Gauteng Holiday		68 210	2 065 679		3.3%	90	5.0													
GT African	Low Income							6	2	2	2	2	2	2	6	24	33			
GT African	Medium Income							7	2	2	3	2	2	1	5	24	33			
GT African	High Income							8	4	2	4	1	2	1	4	26	21			
GT White	Low Income							4	2	2	2	2	2	2	6	22	46			
GT White	Medium Income							5	4	2	3	2	2	1	5	24	33			
GT White	High Income							6	6	2	4	1	2	1	4	26	21			
GT Other Income and Racial Groups								4	6	2	3	2	2	2	6	27	15			
Limpopo, Mpumalanga, Nort West		7 180	1 514 832		0.5%	80	5.0													
Rest African	Low Income							6	2	2	2	2	2	2	6	24	33			
Rest African	Medium Income							7	2	2	3	2	2	1	5	24	33			
Rest African	High Income							8	4	2	4	1	2	1	4	26	21			
Rest White	Low Income							4	2	2	2	2	2	2	6	22	46			
Rest White	Medium Income							5	4	2	3	2	2	1	5	24	33			
Rest White	High Income							6	6	2	4	1	2	1	4	26	21			
Rest Other Income and Racial Groups								4	6	2	3	2	2	2	6	27	15			
Conference/Incentive		28 720				180	2.5	3	6	1	4	1	2	2	4	23	46			
Domestic Special Interest		0				80	3.0	1	8	2	4	1	2	2	5	25	30			
Sport		28 720				30	2.5	3	7	3	3	2	2	3	6	29	10			