



SUMMARY REPORT

16 MARCH 2018



INTRODUCTION

The Board of Airline Representatives of South Africa (BARSA) convened the BARSA Aviation Summit 2018 on Friday, 2 March 2018 at the Hyatt Regency Hotel in Rosebank, Johannesburg.

The Summit was organized under the theme: ***“A Blueprint for Collaboration”***.

In this context, the key objective of the gathering was to establish mechanisms for greater alignment and closer collaboration between aviation and tourism industry role players, in order to tackle the blockages that hinder industry growth.

This one day momentous event brought together high level government and private sector representatives: policy makers, captains of industry, thought-leadership and key stakeholders from across aviation and tourism.

Delegates represented domestic and International airline operators; air transport regulatory authorities; airport operators; aviation service providers; aviation and tourism associations; tourism marketing agencies; government departments and agencies, as well as research institutions.

This document is a summary of the key outcomes of the BARSA Aviation Summit 2018, and provides insights into stakeholder perspectives on some of the key challenges that face the industry and the steps that need to be taken to address them.

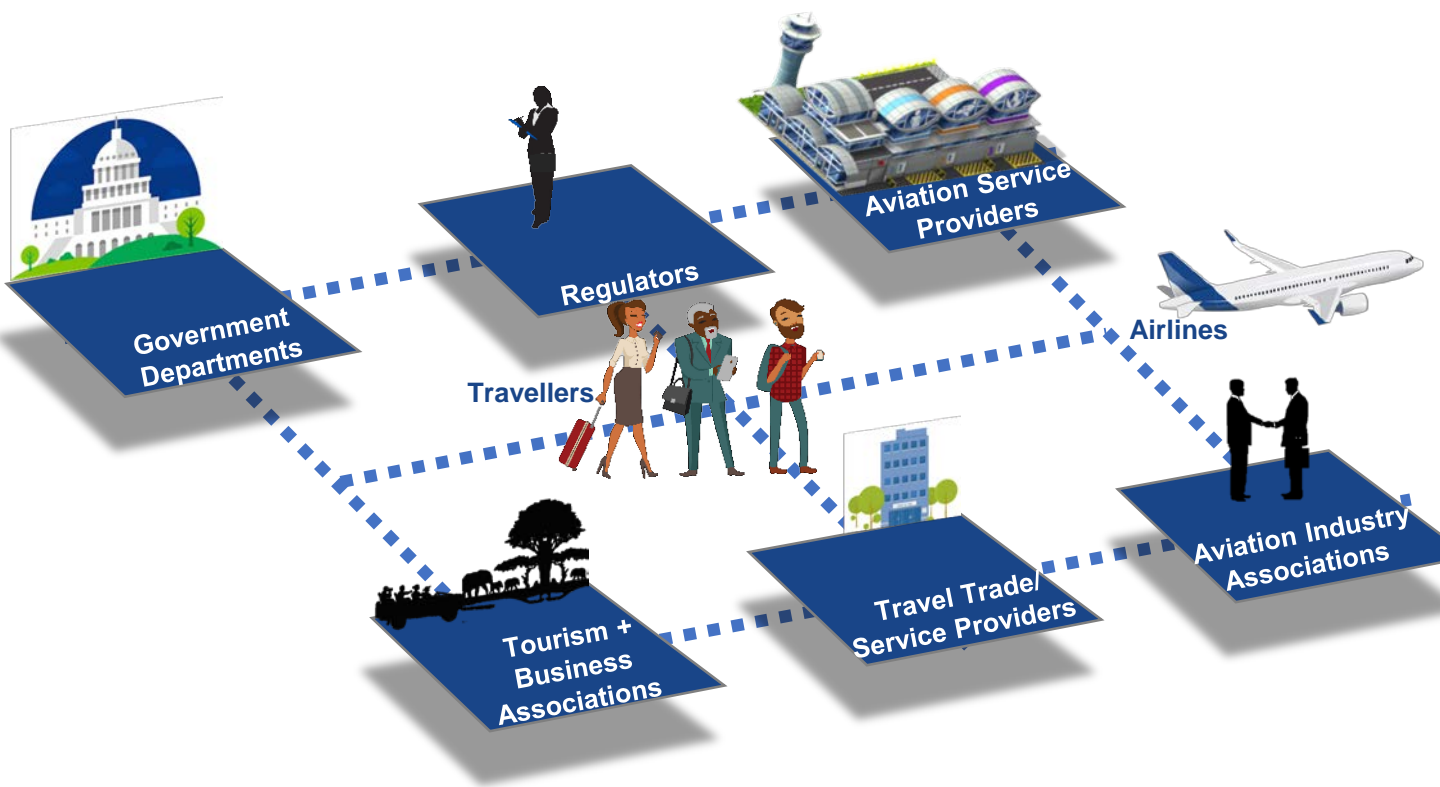
BARSA is committed to working closely with all role players in the aviation and tourism industry in order to pursue the outcomes of the Summit, and to achieve sustainable aviation development and tourism growth.



STAKEHOLDERS

STAKEHOLDER GROUPINGS

The below represent the stakeholder groupings which were considered at the Summit on 2 March 2018.

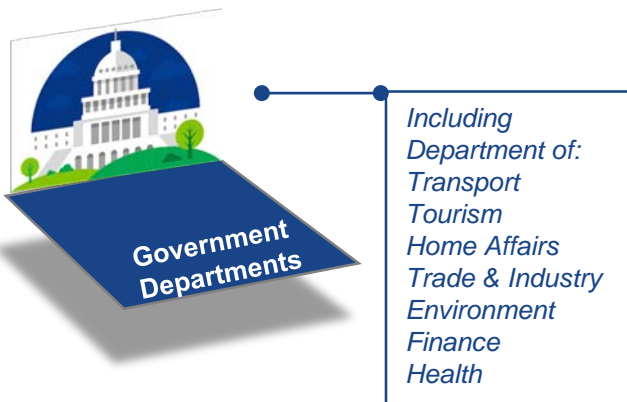




**STAKEHOLDER
PERSPECTIVES**

STAKEHOLDER PERSPECTIVES

The perspectives below provide an extraction of key points raised at the Summit on 2 March 2018.

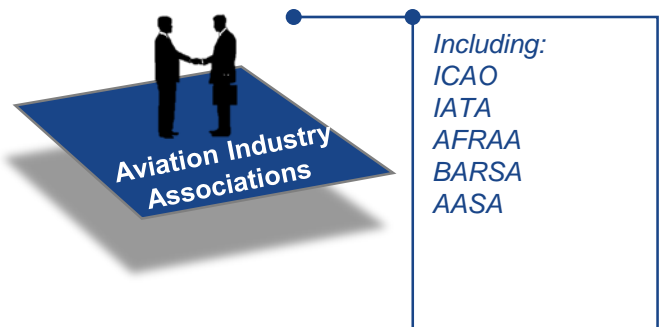


- Committed to strong partnerships across Government departments
- Concerned with removal of regulatory barriers to growth/competitiveness
- Amendments to legislation have been advanced
- Global & Continental Harmonisation
- Balancing growth with adverse environmental impact
- Promote Public/Private Sector collaboration
- Believe collaboration is central to NDP's Vision 2030

- Bring confidence to the country's air transportation systems
- Safety and sustainability remain a key shared area of focus
- Believe it is important to balance passenger interests with those of the sector
- Are committed to reducing the burden of red tape to improve efficiency in the industry
- Adequate resourcing a key consideration for authorities

STAKEHOLDER PERSPECTIVES

The perspectives below provide an extraction of key points raised at the Summit on 2 March 2018.



- Collaborate well on their platforms to improve customer facilitation
- There is room for broader collaboration
- Keen to make themselves more relevant to the communities within which they operate
- Believe active participation in marketing regions is key

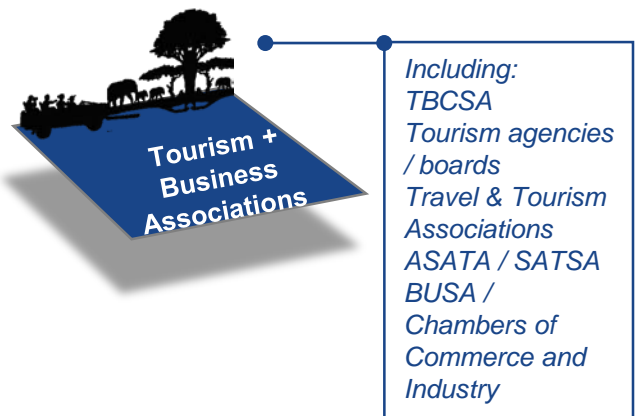
- Emphasise the importance of working off the same data as the industry/country
- Believe that although open skies are good, we need to significantly improve on our capacity to develop mechanisms that help industry associations operationalise policy
- There has to be 'fair' benefit realisation across the players for the sustainability of open skies policies

STAKEHOLDER PERSPECTIVES

The perspectives below provide an extraction of key points raised at the Summit on 2 March 2018.



*Including:
Travel Agents
Tour Operators
Hospitality
Car Hire /
Transport*



*Including:
TBCSA
Tourism agencies
/ boards
Travel & Tourism
Associations
ASATA / SATSA
BUSA /
Chambers of
Commerce and
Industry*

- Business committed to pulling together in the national interest
- Want to build upon/leverage their endowments & competitive advantages
- Believe using technology effectively will bring them closer to their partners and clients
- Have a view that regulations are throttling our businesses
- Want to take advantage of 'Ramaphoria'
- Desire to unlock opportunities for member businesses
- Seeking alignment across the tourism/travel ecosystem in terms of opportunities we pursue as a country
- Support the different players in the industry to ably cater to growth aspirations

STAKEHOLDER PERSPECTIVES

The perspectives below provide an extraction of key points raised at the Summit on 2 March 2018.



- See South Africa as a strategic market for international airlines
 - Acknowledge that there are very competitive global tourist destination markets
 - Believe they need to put the customer at the centre of our collaboration efforts
 - Committed to lowering emissions
- Want
 - For us to get to know them
 - A seamless experience
 - Continuous connectivity
 - For us to live up to our promise
 - To be delighted



SUMMIT FINDINGS

KEY CONCERNS

The following were raised by the Summit attendees as the key concerns in the aviation-tourism industry.

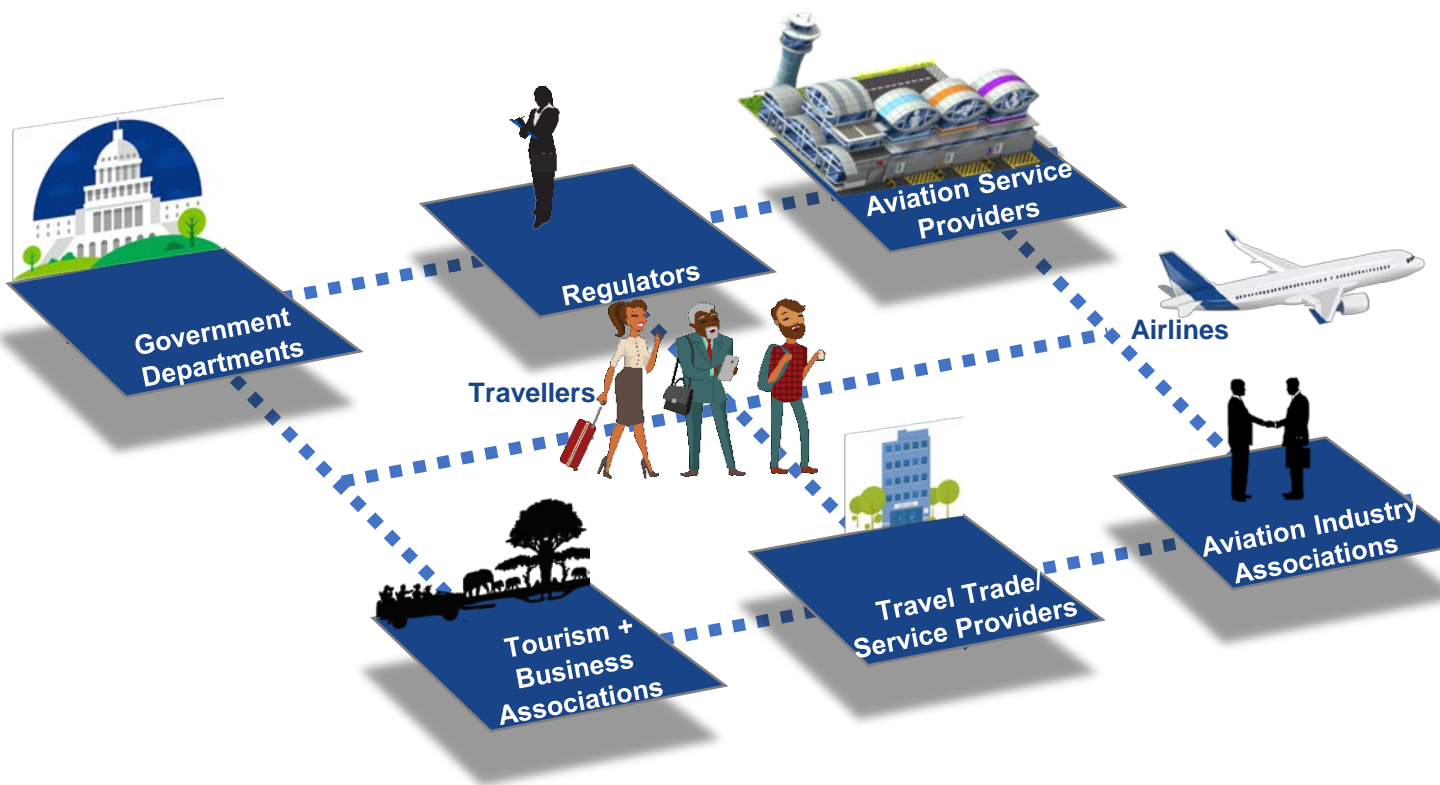
- 1. Lack of quality engagement/consultation and alignment across all levels of the value chain**
- 2. Regulatory Barriers/Constraints**
- 3. Slow economic growth forecast in the short term/government debt levels**
- 4. Safety & security country reputation**



**SUMMIT
OUTCOME**

SELECTED STRATEGIC QUESTION

“How do we work together to create a seamless traveller experience?”

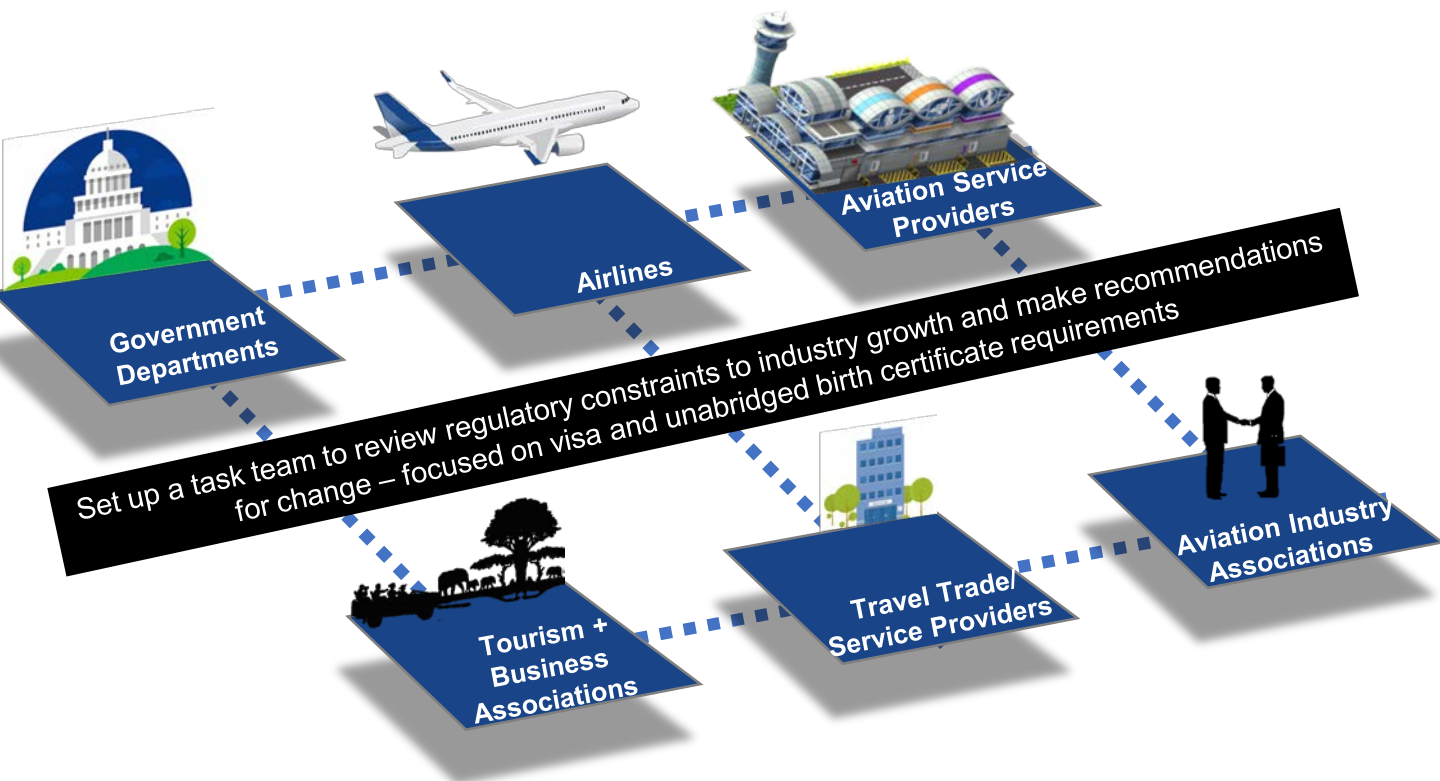




**POTENTIAL QUICK
WINS**

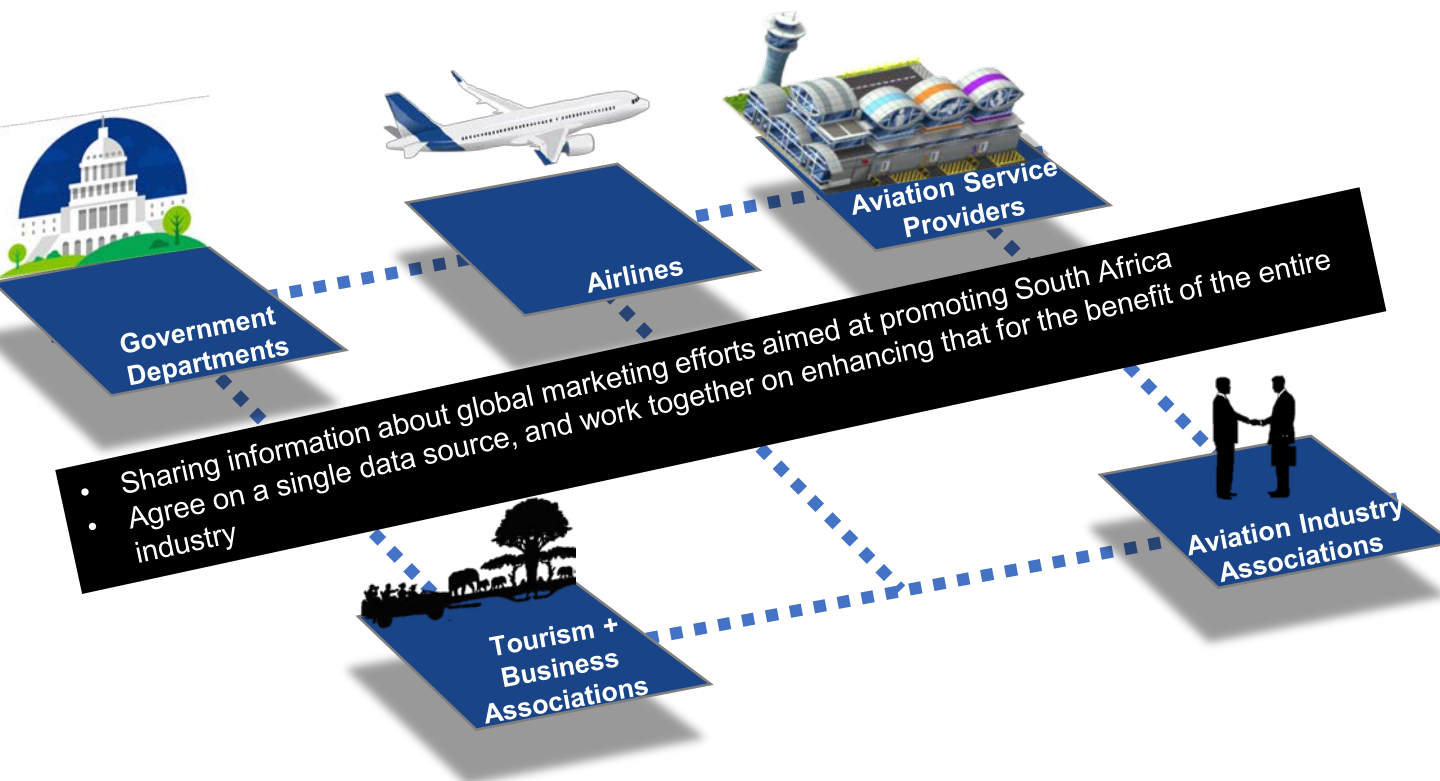
POSSIBLE QUICK WIN – 1

The below represents a possible quick win given the perspectives identified at the Summit, as well as the relevant stakeholders.



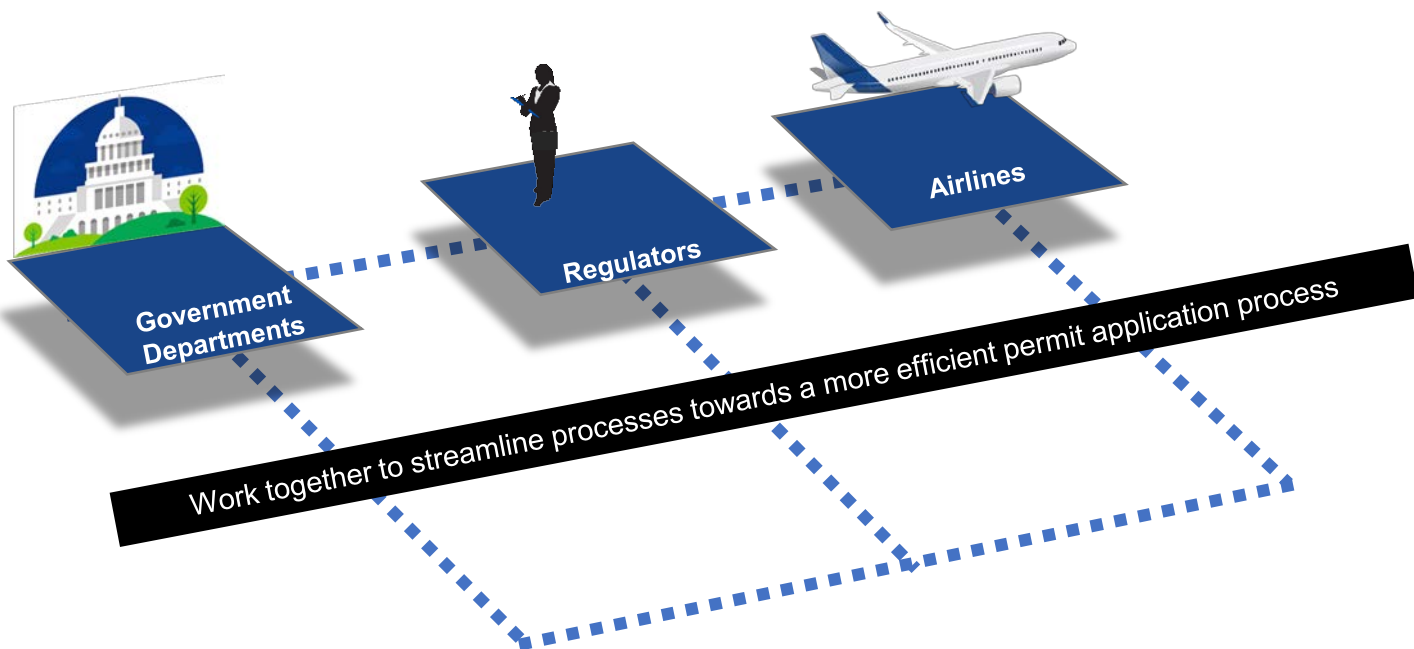
POSSIBLE QUICK WIN – 2

The below represent possible quick wins given the perspectives identified at the Summit, as well as the relevant stakeholders.



POSSIBLE QUICK WIN – 3

The below represents a possible quick win given the perspectives identified at the Summit, as well as the relevant stakeholders.





CONCLUSION



CONCLUSION

In her closing remarks the BARSA CEO made specific commitments to follow through on key actions raised at the Summit.

- 1. BARSA will meet individual stakeholders over the next three to six months regarding specific actions that require follow through**
- 2. Other existing stakeholder engagement platforms will be leveraged to drive the agenda items raised at the conference**
- 3. BARSA will organize the BARSA Aviation Summit in 2019 and use that opportunity to assess progress**
- 4. Industry support for high level intergovernmental engagements pledged**

CONCLUSION

With your cooperation, we have achieved our aim of having the BARSA Aviation Summit 2018 certified a green event by the Event Greening Forum:

1. **BARSA signed a Sustainable Event Charter committing to making this Summit a green event and care was taken to ensure every aspect of the event met the prescribed requirements**
2. **BARSA would like to thank all conference delegates, the host venue (The Hyatt Rosebank), the organisers, suppliers and support staff for helping us realize this achievement**



THANK YOU FOR YOUR CONTRIBUTION

