



Brand Performance in USA

February 2024

800 Respondents

March 29, 2024

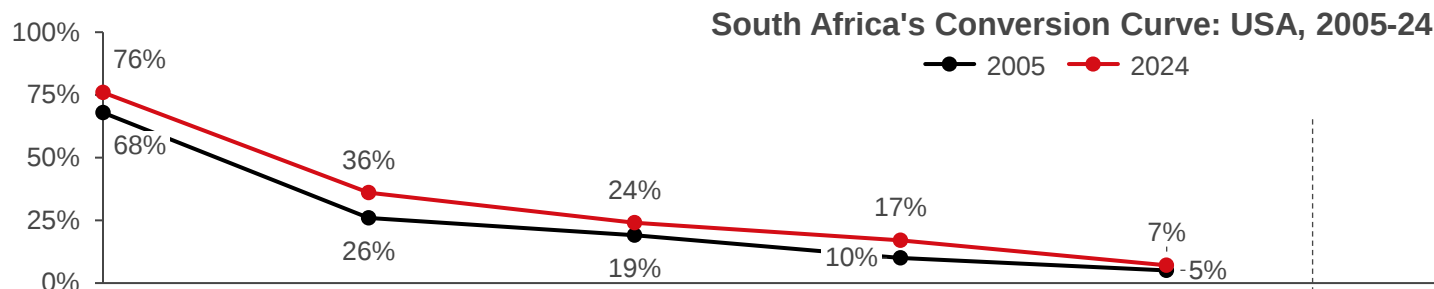
SA Tourism **BrandTracker**



SOUTH AFRICA'S LONGITUDINAL PERFORMANCE

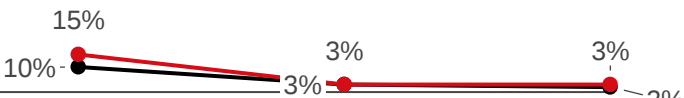


Brand Journey | Longitudinal Analysis of Conversion Curve in USA



Acceptance Ratio Closure Ratio

(2005: 1 in 14.17) (2005: 1 in 3.59)
(2024: 1 in 10.85) (2024 1 in 5.00)



	Total Awareness	Positivity	Long-term Consideration	Plan to Seek Info	Short-term Consideration
2005	68%	26%	19%	10%	5%
2006	70%	29%	22%	13%	6%
2007	77%	36%	31%	16%	9%
2008	75%	33%	28%	14%	9%
2009	79%	37%	30%	15%	9%
2010	81%	34%	27%	15%	7%
2011	82%	40%	30%	21%	12%
2012	84%	44%	32%	22%	14%
2013	82%	37%	29%	16%	9%
2014	85%	40%	31%	22%	13%
2015	81%	36%	27%	20%	9%
2016	80%	39%	30%	19%	11%
2017	82%	39%	30%	15%	9%
2018	83%	39%	28%	14%	8%
2019	81%	36%	26%	12%	7%
2020	81%	33%	27%	20%	10%
2022	78%	37%	27%	19%	9%
2023	75%	35%	25%	16%	8%
2024	76%	36%	24%	17%	7%
2005-24	8% ↑	10% ↑	7% ↑	7% ↑	2% ↑

Sought Info Recently	Have Visited Recently	Recommendation
10%	3%	2%
14%	3%	2%
16%	4%	3%
15%	4%	3%
16%	4%	3%
17%	5%	3%
21%	9%	7%
20%	10%	8%
17%	7%	5%
19%	8%	7%
18%	6%	4%
18%	8%	7%
17%	5%	4%
16%	4%	3%
14%	5%	4%
18%	6%	4%
18%	7%	5%
14%	4%	3%
15%	3%	3%
5% ↑	0% ↔	1% ↑

Acceptance Ratio: Ratio of % of travellers who are aware of the destination to % of travellers who plan to visit the destination in the next 18 months to

Closure Ratio: Ratio of % of travellers who have sought information about the destination in the last 18 months to % of travellers who have visited the destination in the last 18 months

Note: Feb'24 wave data has been used for 2024; results for 2005, 2007 to 2019 and 2023 are based on Feb, Jun and Nov waves, respectively. Nov and Sep'22 waves data have been used for the year 2022. Feb'20 wave has been used for the year 2020; while results for 2006 are based on the Nov wave; Recommendation is calculated based on the respondents who have recently visited South Africa.

Source: SAT Brand Tracker Data, 2005–24

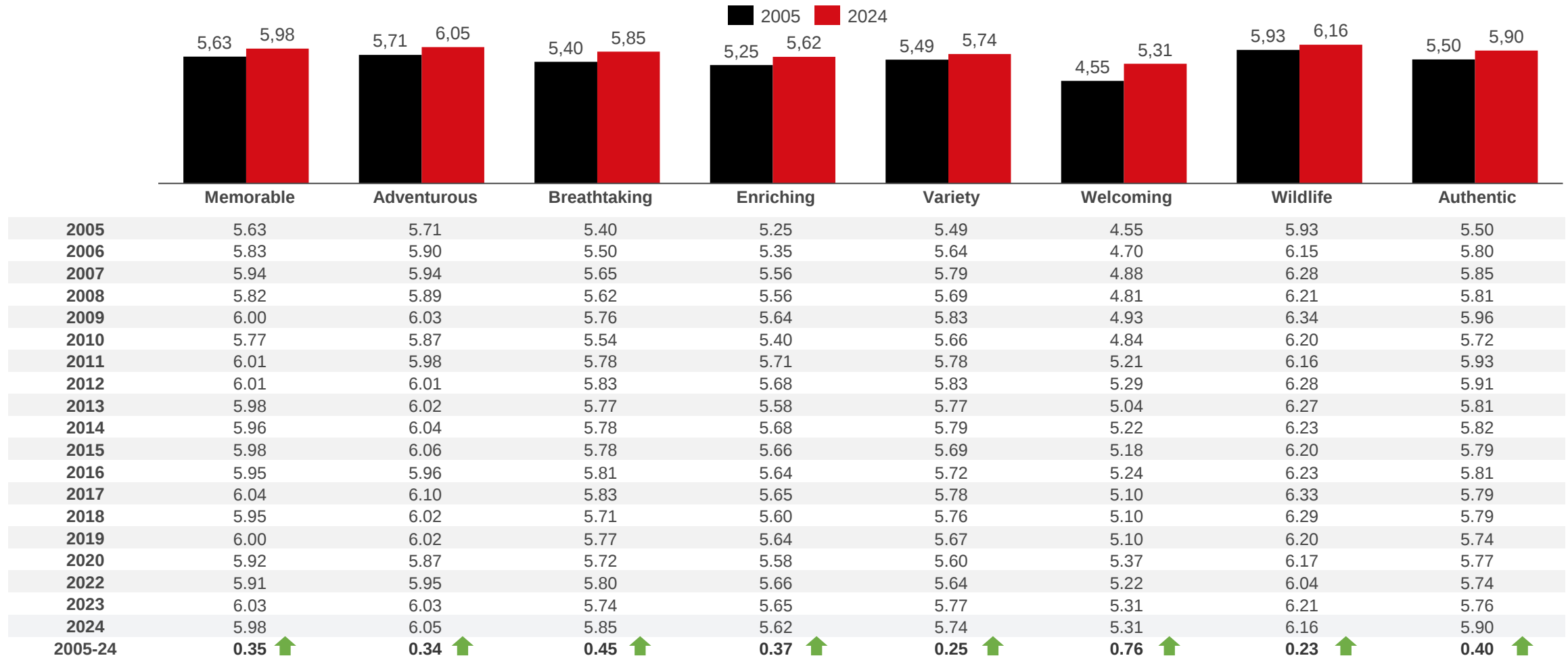
SAT - Feb-24 - USA Market Report



Brand Knowledge | Key Emotional and Functional Attributes: USA



South Africa's Scores on Emotional and Functional Attributes: USA, 2005-24



Note: Feb'24 wave data has been used for 2024; results for 2005, 2007 to 2019 and 2023 are based on Feb, Jun and Nov waves, respectively. Nov and Sep'22 waves data have been used for the year 2022. Feb'20 wave has been used for the year 2020; while results for 2006 are based on Nov wave; Recommendation is calculated based on the respondents who have recently visited South Africa.

Source: SAT Brand Tracker Data, 2005–24
SAT - Feb-24 - USA Market Report



BRAND KNOWLEDGE



South Africa Rank Versus All Destinations | Longitudinal

South Africa Ranks Across Waves

	Nov-22 (n=266)	Feb-23 (n=258)	Jun-23 (n=131)	Oct-23 (n=266)	Feb-24 (n=264)
Memorable	6	6	6	6	5
Adventurous	4	3	5	3	3
Offers a Wildlife Experience	3	1 	3	2	2
Welcoming People You Can Interact With	7	7	8	6	8
Offers a Wide Variety of Experiences	8	4	8	6	6
Breath-taking	3	6	6	6	4
Enriching	6	7	8	7	8
A Very Authentic Travel Experience	6	6	9	7	2
Offers Excellent Value for the Money	9	8	8	5	5
Is a Safe & Secure Environment	7	7	7	8	7

 Top Desirable Performance and Personality Associations for Feb-24

 Highest Rank

 Lowest Rank

 Significantly Above Average (at 95% confidence level)

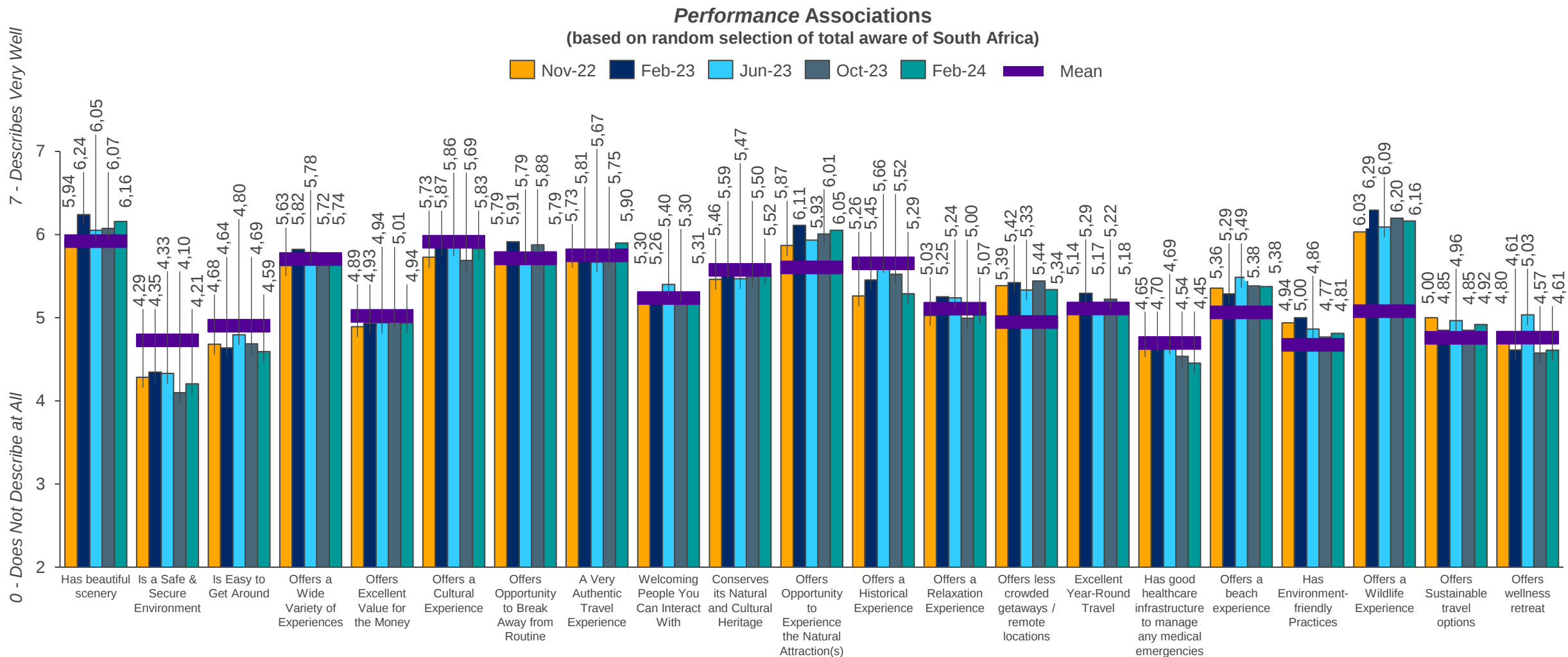
 Significantly Below Average (at 95% confidence level)

Based on a random selection of total aware of each country as an international destination for leisure purposes

Performance Ratings (Q22): How well do each of the following attributes describe this country? Use a scale of 1–7 where 1 is “Does Not Describe at All” and 7 is “Describes Extremely Well”.

Personality Ratings (Q23): How well do each of the following attributes describe this country? Use a scale of 1–7 where 1 is “Does Not Describe at All” and 7 is “Describes Extremely Well”.

South Africa Performance Associations | Total



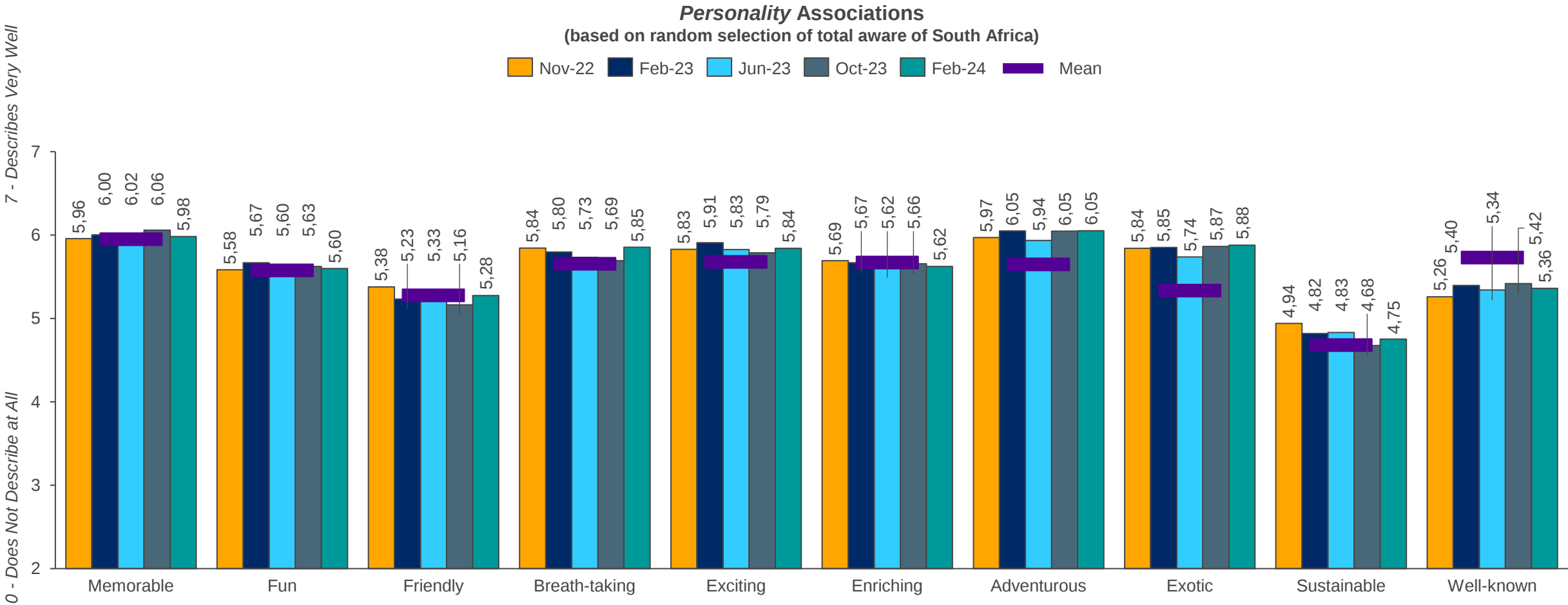
Based on a random selection of those aware of South Africa: Nov-22: (n=266) Feb-23: (n=258) Jun-23: (n=131) Oct-23: (n=266) Feb-24: (n=264)

Mean: The average rating for all destinations on this measure in February 2024 within the market

Performance (Q22): How well do each of the following attributes describe this country? Use a scale of 1–7 where 1 is “Does Not Describe at All” and 7 is “Describes Extremely Well”.



South Africa Personality Associations | Total



Based on a random selection of those aware of South Africa: Nov-22: (n=266) Feb-23: (n=258) Jun-23: (n=131) Oct-23: (n=266) Feb-24: (n=264)

Mean: The average rating for all destinations on this measure in February 2024 within the market

Personality (Q23): How well do each of the following attributes describe this country? Use a scale of 1–7 where 1 is “Does Not Describe at All” and 7 is “Describes Extremely Well”.



BRAND JOURNEY



South Africa Rank Versus All Destinations | Longitudinal

South Africa Ranks Across Waves

	Nov-22	Feb-23	Jun-23	Oct-23	Feb-24
Total Awareness	8	8	8	8	8
Unaided Awareness	8	9	8	8	8
Positivity	7	8	8	8	8
Likely to Visit in Future	7	8	8	8	8
Likely to Seek Info	7	8	8	8	8
Uniqueness	1 ★	2	3	3	1 ★
Stature	7	7	8	7	7
Sought Info	7	8	8	8	8
Familiarity	8	9	7	9	8
Suitability	6	7	6	7	7
Likely to Visit in Next 18 Months	7	8	8	8	8
Closure Ratio	7	11 ✖	11 ✖	9	10



Highest Rank



Lowest Rank



Significantly Above Average (at 95% confidence level)



Significantly Below Average (at 95% confidence level)

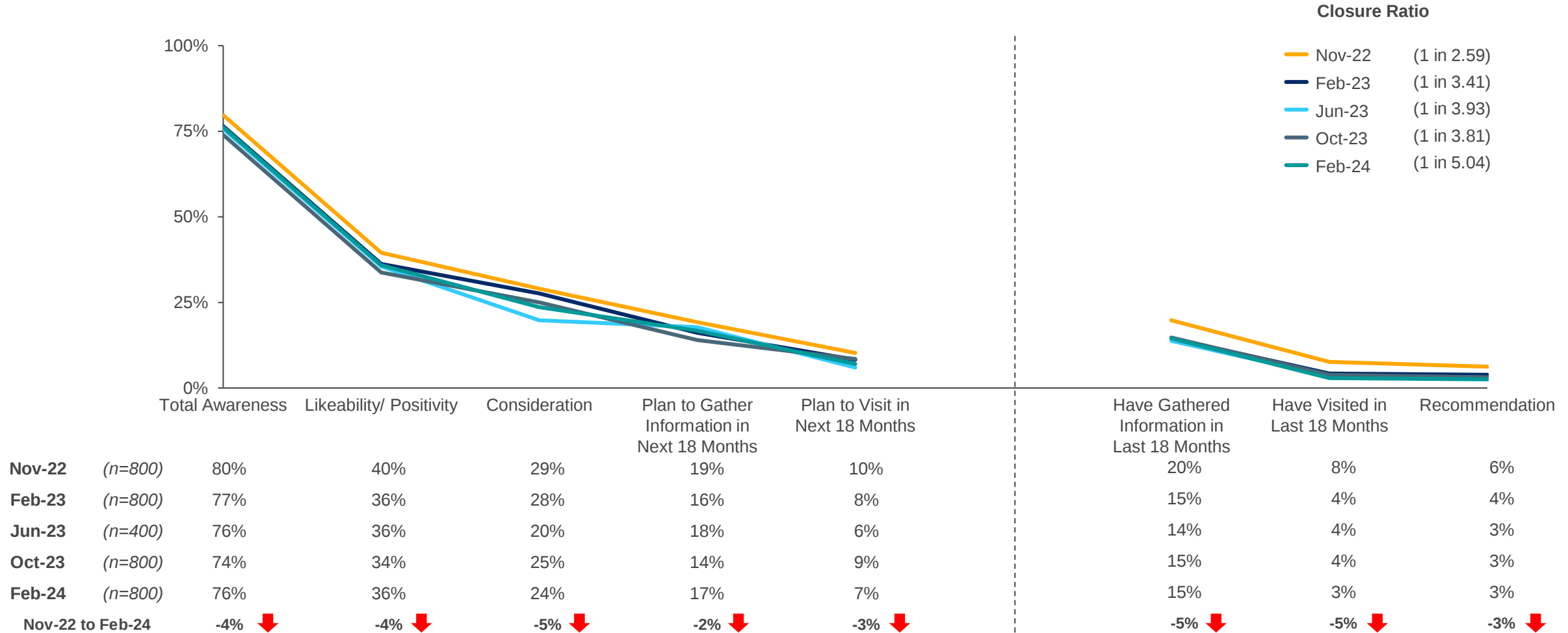
Based on all respondents: Nov-22: (n=800) Feb-23: (n=800) Jun-23: (n=400) Oct-23: (n=800) Feb-24: (n=800)

CONVERSION CURVE



South Africa Longitudinal Conversion Curve | Total

South Africa Conversion Curve Across Waves — Total



Closure Ratio: Ratio of % of people who have gathered the information about the destination in last 18 months to % of people who have visited the destination in last 18 months

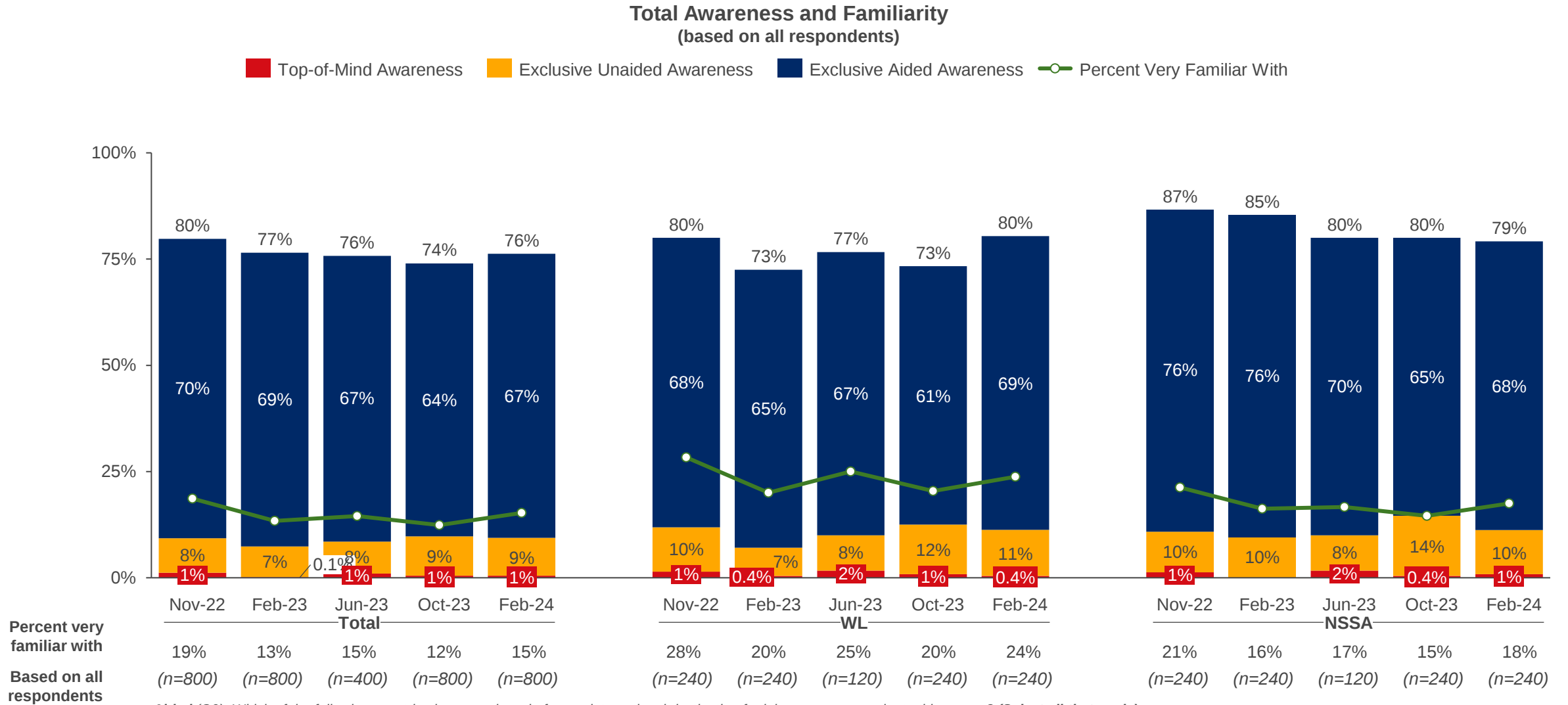
Customer Conversion (Based on Q9, Q29, Q14, Q17, Q15, Q16a, Q16b and Q32): Based on those that have travelled internationally in the last 5 years; Respondents to likeability limited to quota; Likeability/Positivity, Plan to Gather Information in Next 18 Months, and Plan to Visit in Next 18 Months based on ratings of 6 or 7 on a 7-point scale.

Note: For all questions, the percentages are based on total respondents not the awareness base for the destination; Recommendation is calculated based on the respondents who have recently visited

SOUTH AFRICA SNAPSHOT



Total Awareness and Familiarity | By Segment

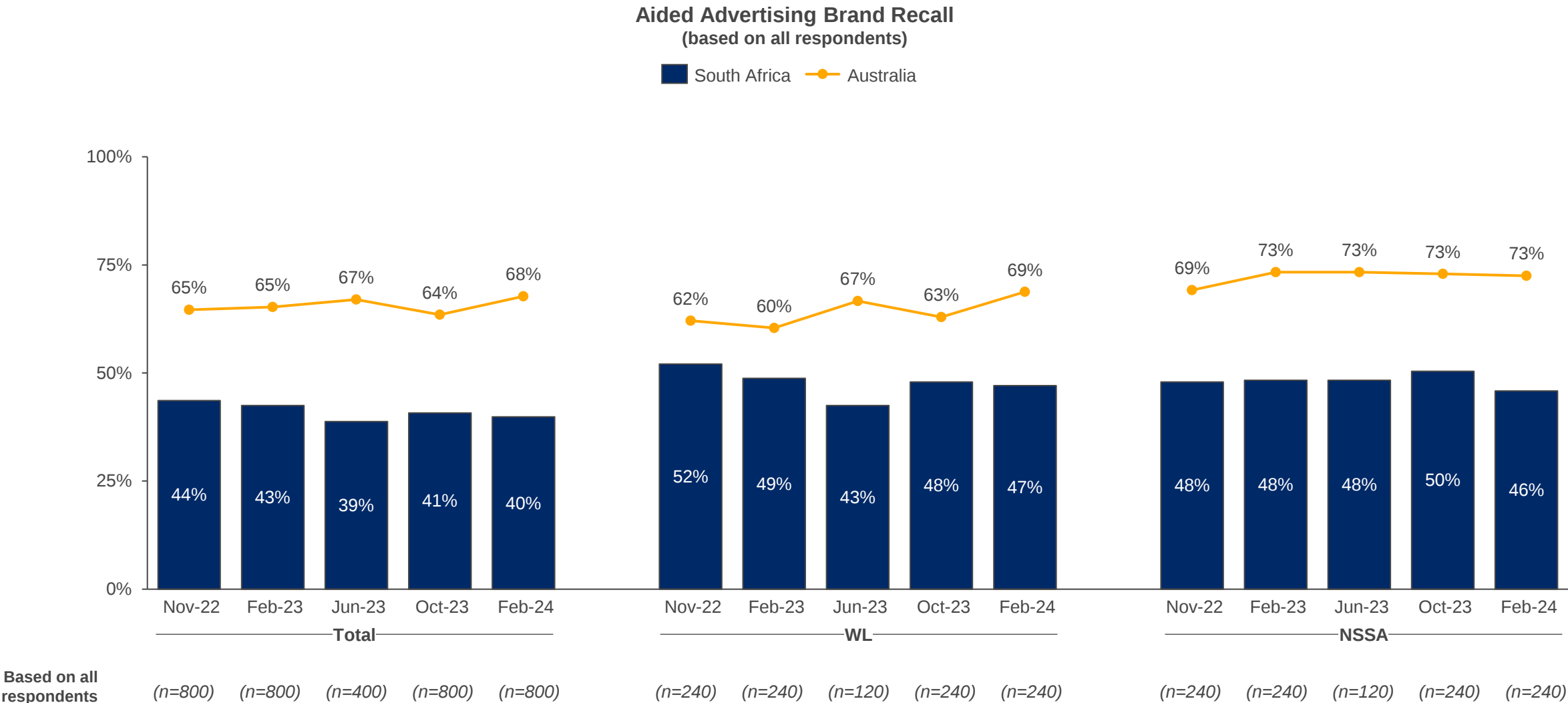


Aided (Q9): Which of the following countries have you heard of as an international destination for leisure purposes prior to this survey? **(Select all that apply)**

Unaided (Q7): I would like to begin by asking you about international destinations for leisure purposes. By this we mean "foreign countries that you may consider visiting for leisure and enjoyment". When you think about "international destinations for leisure purposes", which countries come to mind? **Top-of-Mind (Q7):** First mention to unaided awareness question.

Percent "Very Familiar" with Each Country (Q11): Of all respondents, the percentages who are "very familiar" with each as an international destination for leisure purposes.

Aided Advertising Brand Recall | By Segment

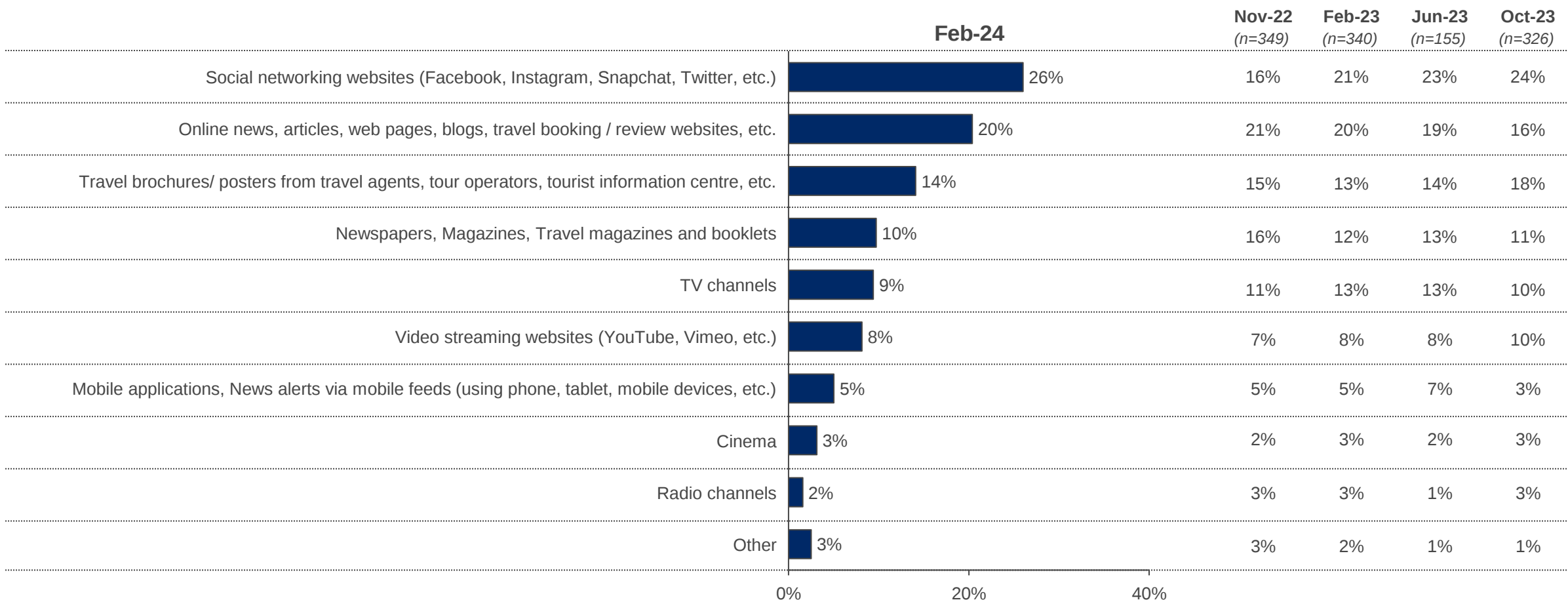


Aided Advertising Brand Recall (Q10): Which of the following international destinations for leisure purposes have you ever seen or heard travel information about? (By travel information we mean: advertisements on different media including social media, special offers, brochures, website information, articles, travel posters, television programs, etc.) **(Select all that apply)**



Brand Media Channels

Media Channels for South Africa
(based on aided advertising brand recall)



Based on aided advertising brand recall: (n=319)

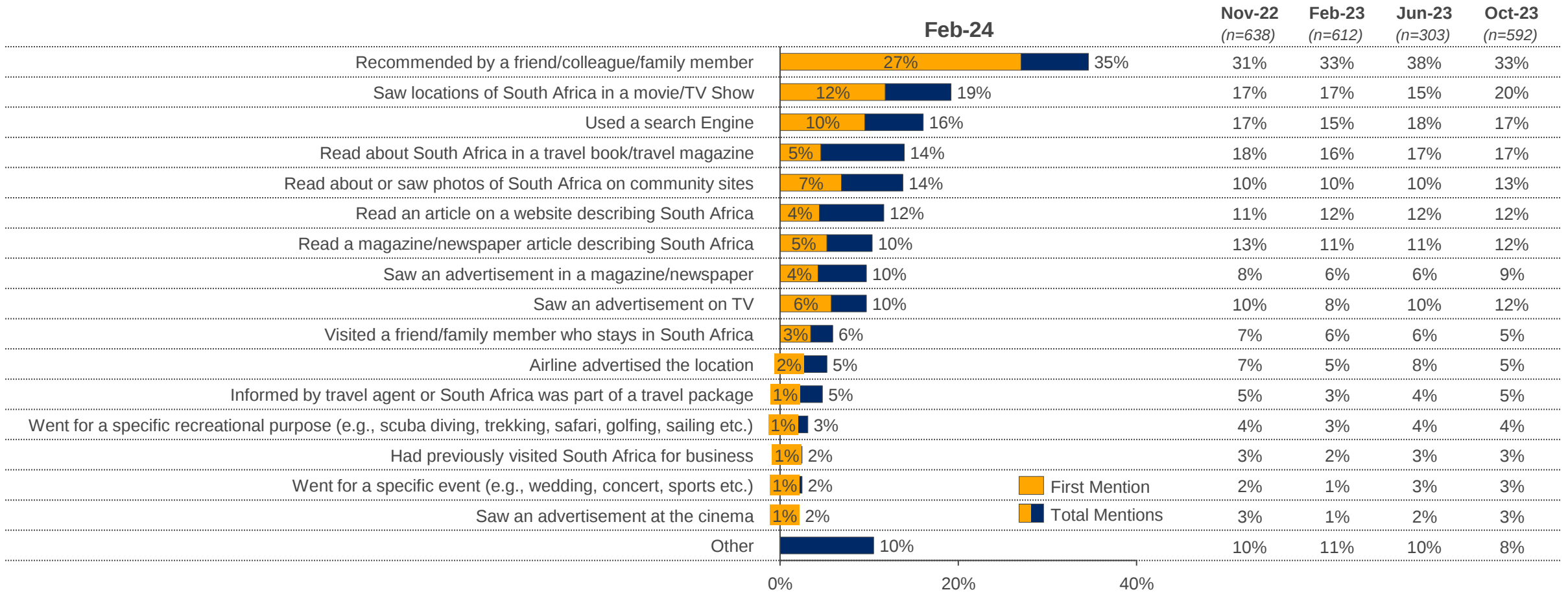
Brand Media Channels (Q10b): Where did you last see the marketing communication for the following international destination(s) for leisure purposes? (Single select)

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Sources of Awareness

How Did You First Become Aware of South Africa as a Leisure Travel Destination



Based on respondents who were aware of South Africa as a leisure travel destination: (n=610)

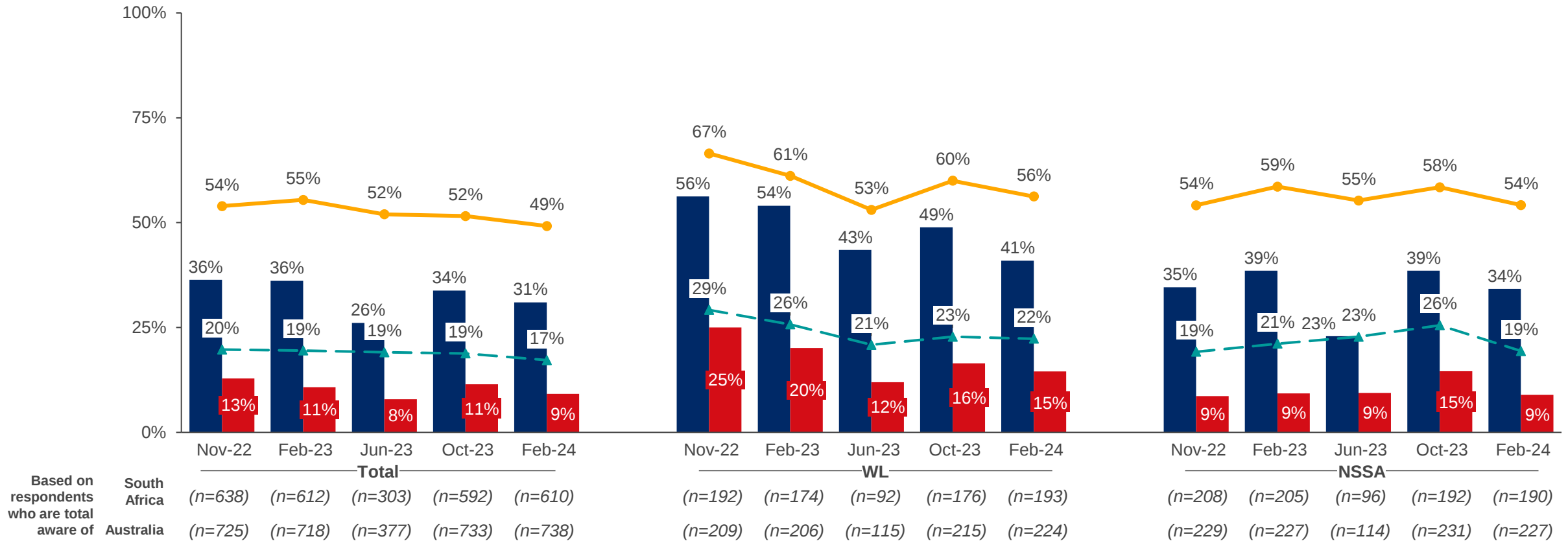
Sources of Awareness (Q33a/b): How did you FIRST become aware of South Africa as a leisure destination? (Select all that apply). Please rank the order in which each of these sources contributed to you FIRST becoming aware of South Africa as a leisure destination. (Please select one response per column)



Future Consideration | By Segment

Destinations Intend to Visit for Leisure in the Future
(based on total aware of respective destination)

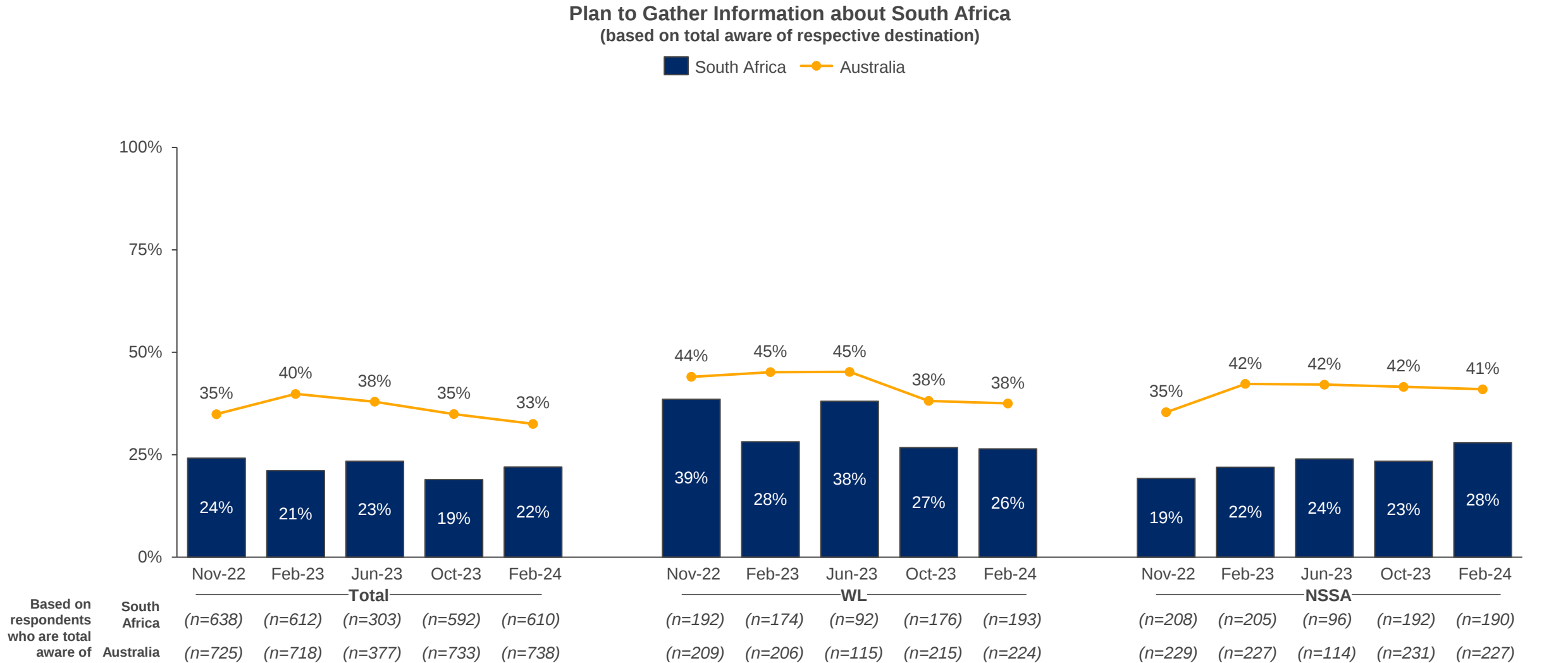
■ South Africa - Intend to Visit in the Future —●— Australia - Intend to Visit in the Future
■ South Africa - Likely to Visit in Next 18 Months —▲— Australia - Likely to Visit in Next 18 Months



Blue Sky Consideration (Q14): Which of the following international destinations do you intend to visit for leisure purposes in the future even if you have been there before? **(Select all that apply)**
Short-term Consideration (Q15): Please rate your likelihood to visit each of the following international destinations for leisure purposes in the next 18 months? (Percent rating of 6 or 7 on a 1–7 scale)



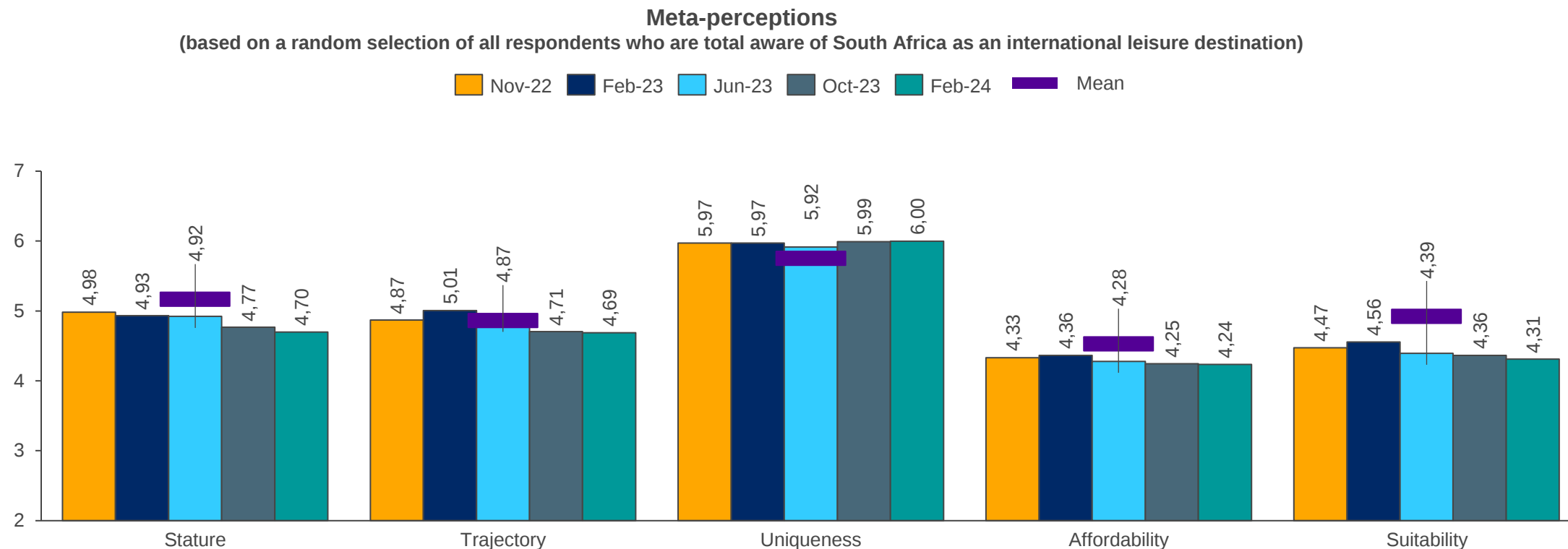
Information Gathering Intent | By Segment



Likelihood to Seek Travel Information (Q17): Thinking about the future, how likely are you to seek information in the next 18 months on the following international destinations for leisure purposes? Please answer on a scale of 1–7 where 1 means “Definitely Will Not Seek Information” and 7 means “Definitely Will Seek Information”. (Percent rating of 6 or 7 on a 1–7 scale)



Meta-perceptions Snapshot



Based on a random selection of all respondents who are total aware of South Africa as an international leisure destination: Nov-22: (n=405) Feb-23: (n=386) Jun-23: (n=200) Oct-23: (n=386) Feb-24: (n=401)

Mean: The average rating for all destinations on this measure in February 2024 within the market

Stature (Q24): To what extent do you think each of the following is "One of the Best or Worst Destinations for Leisure Purposes" using a 1–7 scale where 1 means "One of the Worst International Destinations for Leisure Purposes" and 7 means "One of the Best International Destinations for Leisure Purposes"?

Uniqueness (Q26): Some international destinations for leisure purposes are more unique and distinctive in terms of the overall travel experience they offer. Please rate each international destination according to how unique and distinctive you think the leisure travel experience is using a 1–7 scale where 1 means "Not Unique or Distinctive" and 7 means "Very Unique and Distinctive".

Affordability (Q27): Some international destinations for leisure purposes are more affordable than others and some are less affordable. Please rate each of the following international destinations according to how affordable you believe it is (including airfare) using a 1–7 scale where 1 means "Not at All Affordable" and a 7 means "Very Affordable".

Suitability (Q25): Some international destinations for leisure purposes meet the needs of many different types of leisure travellers (i.e., travellers seeking relaxation, travellers seeking a cultural experience, travellers seeking adventure, etc.), while others are suitable for only specific types of leisure travellers. Rate each of the following international destinations according to its suitability for you as a leisure traveller. Rate each using a 1–7 scale where 1 means "Less Suitable for Many Types" and 7 means "More Suitable for Many Types".

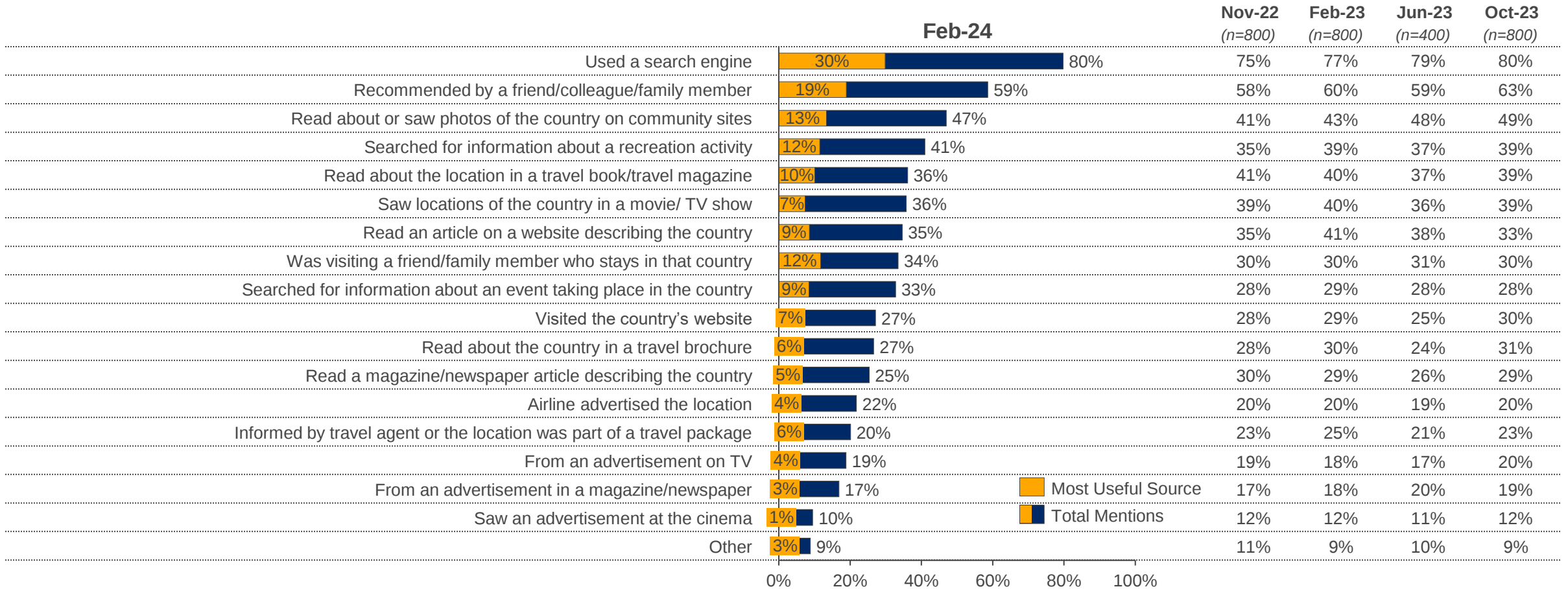
Trajectory (Q28): Some international destinations for leisure purposes are growing in popularity while others are not. Please rate each of the following international destinations for leisure purposes according to your belief that it is growing in popularity. Using a 1–7 scale where a 1 means "Declining Reputation" and 7 means "Improving Reputation".

PAST TRAVEL BEHAVIOUR



Information Sources | All Destinations

Sources of Travel Information
(based on all respondents)

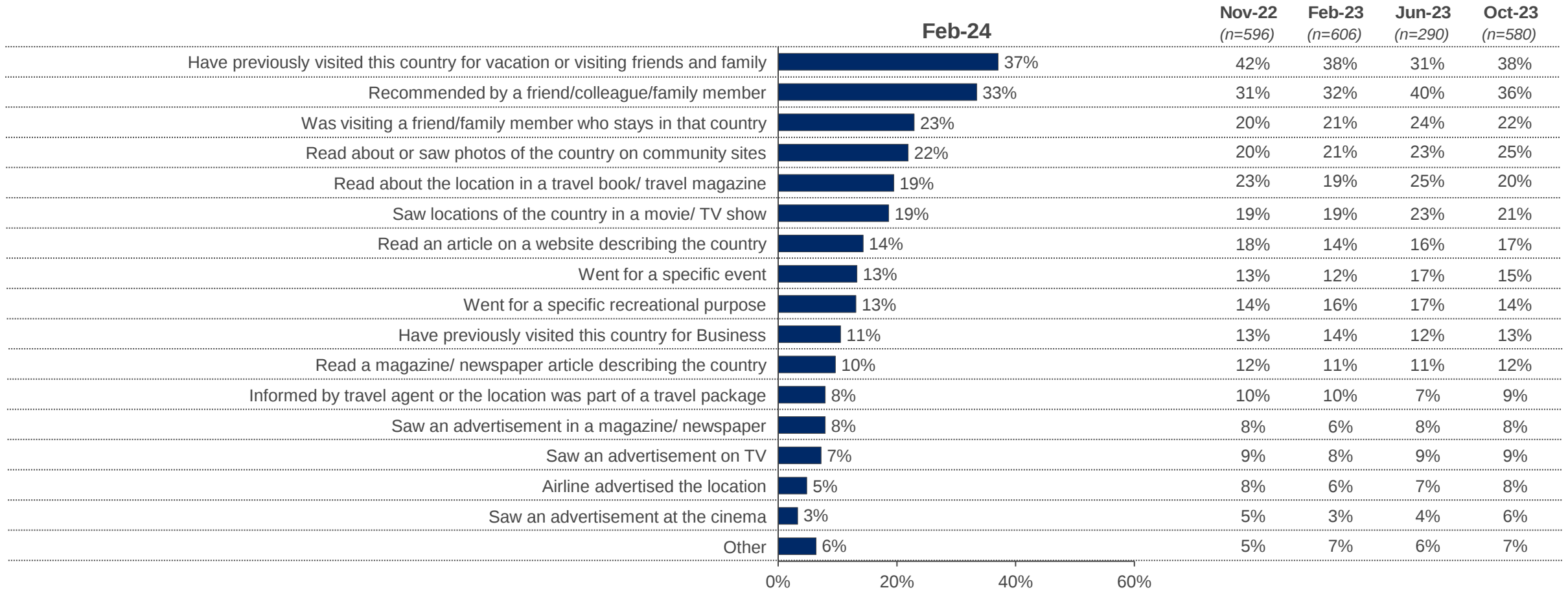


Based on all respondents: (n=800)

Information Sources (Q16d/c): Which of the following sources of information have you used/ came across to obtain leisure travel information about each of these countries in the last 18 months? (Select all that apply). Which of the following was the most useful source of information that you used/ came across to seek leisure travel information about these countries? (Single Select)

Reasons for Leisure Visits | Total

Reasons for Considering a Leisure Destination
(based on all respondents who have visited at least one of the travel destinations in the past 5 years)



Based on all respondents who have visited at least one of the travel destinations in the past 5 years (n=580; 73% of all respondents)

Trigger for Leisure Visits (Q12c): What prompted you to consider visiting this/these international leisure destination(s) on this trip? (Select all that apply)

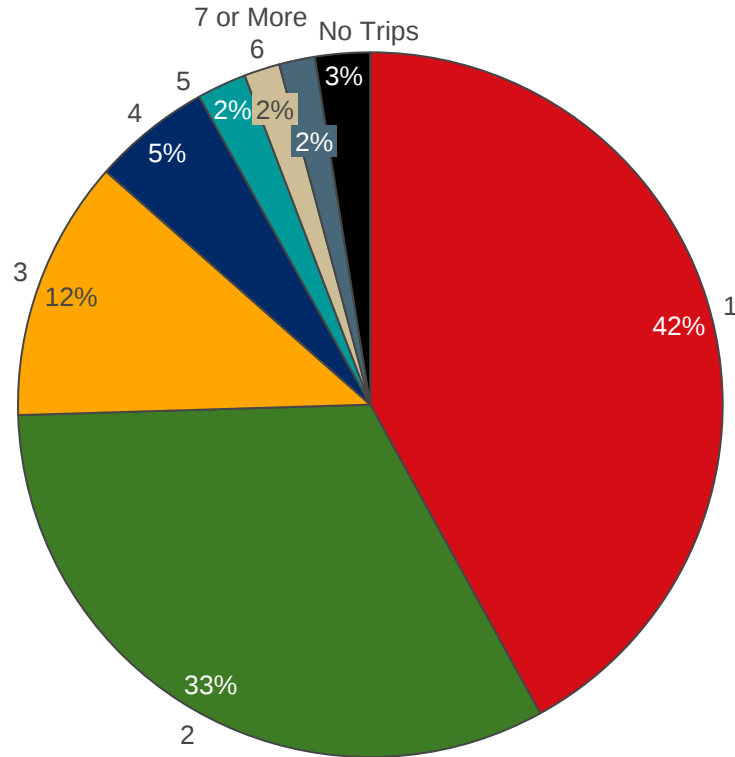


GENERAL TRAVEL BEHAVIOUR



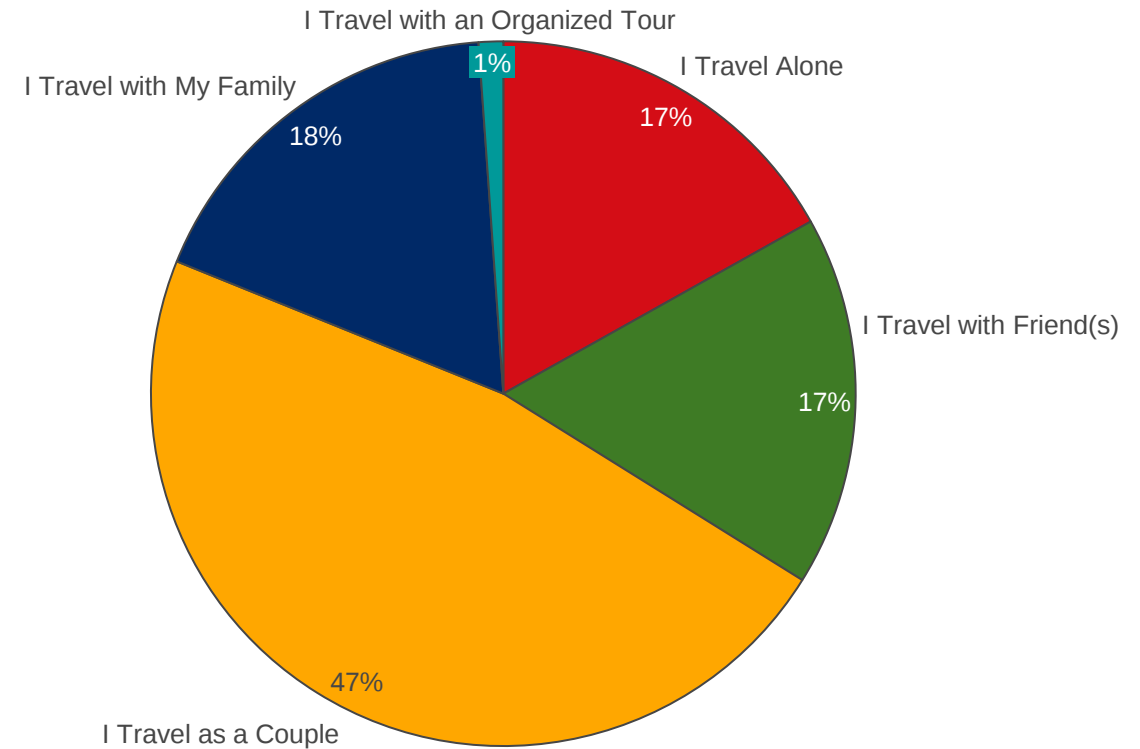
Travel Habits | Number of Trips and Individuals

Average Number of International Trips per Year
(based on all respondents)



Average: 2.1 Trips

Number of People on Typical International Leisure Visit
(based on all respondents)



Based on all respondents: Feb-24: (n=800)

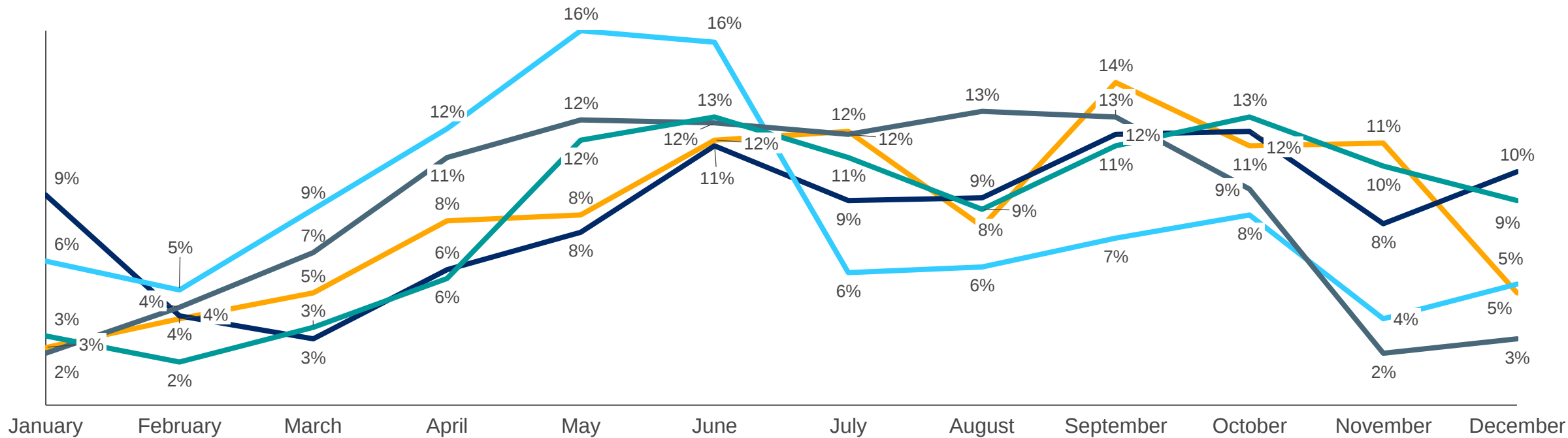
Number of Trips (Q45a): On average, how many international trips for leisure purposes do you take every year requiring a plane ride of 5 or more hours?

Number of Individuals (Q45b): When you travel internationally for leisure, who do you usually travel with?

Preferred Time for Travel

Month of Recent International Trip for Leisure Purposes
(based on respondents who travelled for leisure purposes in the last 5 years)

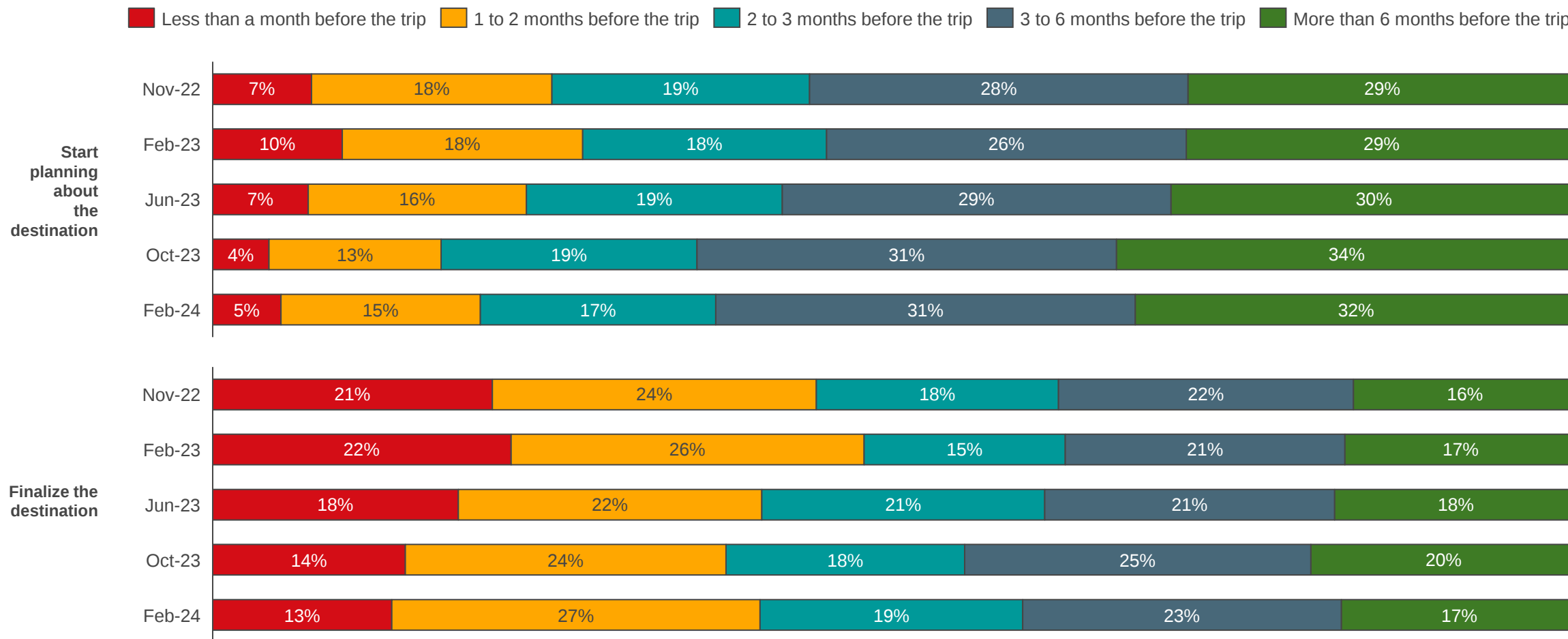
Nov-22 Feb-23 Jun-23 Oct-23 Feb-24



Based on respondents who travelled for leisure purposes in the last 5 years: Nov-22: (n=800) Feb-23: (n=800) Jun-23: (n=400) Oct-23: (n=800) Feb-24: (n=800)
Month of travel (Q12a_2): Please select the month of travel for your most recent international trip for leisure purposes? (Choose one)

Planning and Finalizing the Trip

Plan and Finalize an International Trip for Leisure Purposes
(based on respondents who travelled for leisure purposes in the last 5 years)



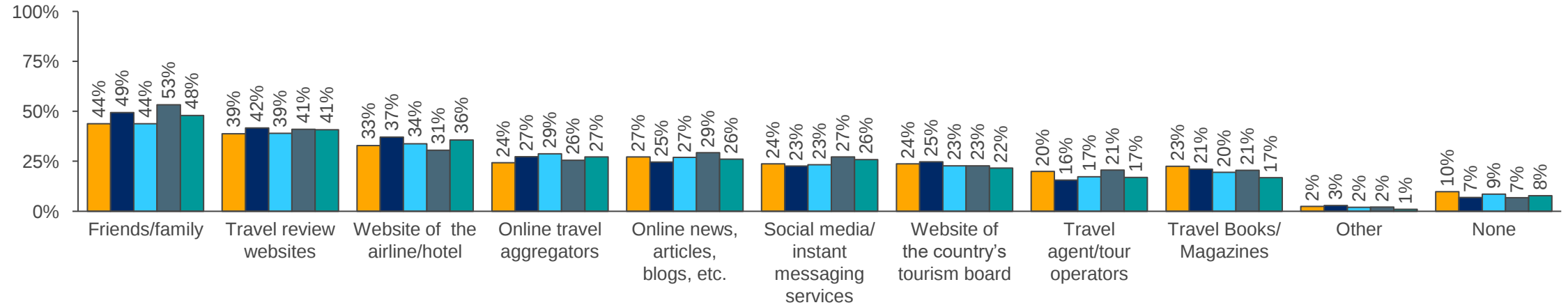
Based on respondents who travelled for leisure purposes in the last 5 years: Nov-22: (n=800) Feb-23: (n=800) Jun-23: (n=400) Oct-23: (n=800) Feb-24: (n=800)
Planning the Trip (Q12a_3): Thinking back to the time when you were planning for this trip, how many months before the trip did you start thinking about the destination for the trip? **(Choose one)**
Finalizing the Trip (Q12a_4): Thinking back to the time when you were finalizing the trip, how many months before the trip did you decide the destination for this trip? **(Choose one)**

Role of Media Channels (1/2)

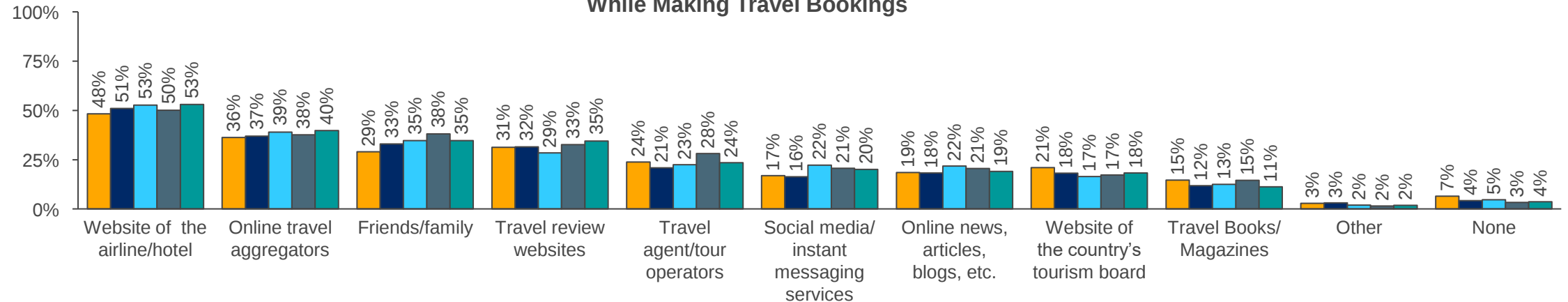
Role of Media Channels at Different Stages of International Leisure Trip
(based on all respondents)

Nov-22 Feb-23 Jun-23 Oct-23 Feb-24

While Selecting The Destination



While Making Travel Bookings



Based on all respondents: Nov-22: (n=800) Feb-23: (n=800) Jun-23: (n=400) Oct-23: (n=800) Feb-24: (n=800)

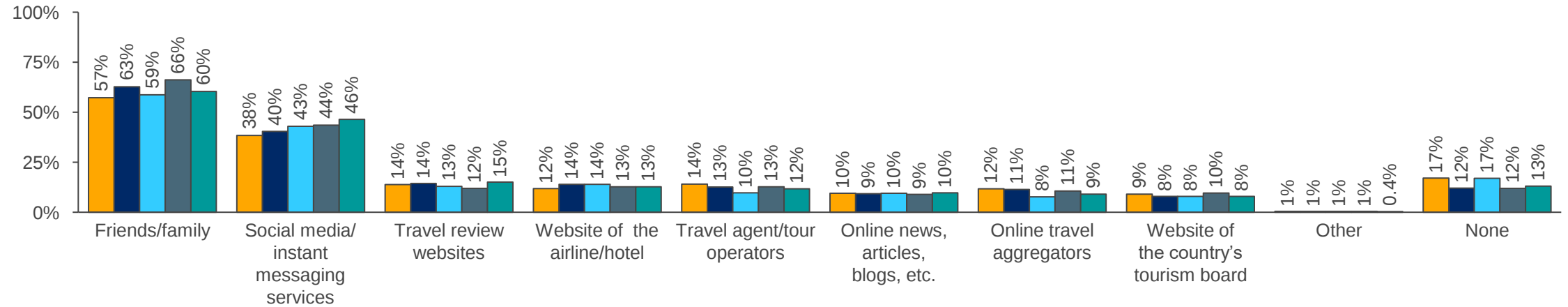
Role of Media Channels at different stages (Q12d): For your most recent trip, which of the following sources did you use at different stages of the trip? (Choose all that apply)

Role of Media Channels (2/2)

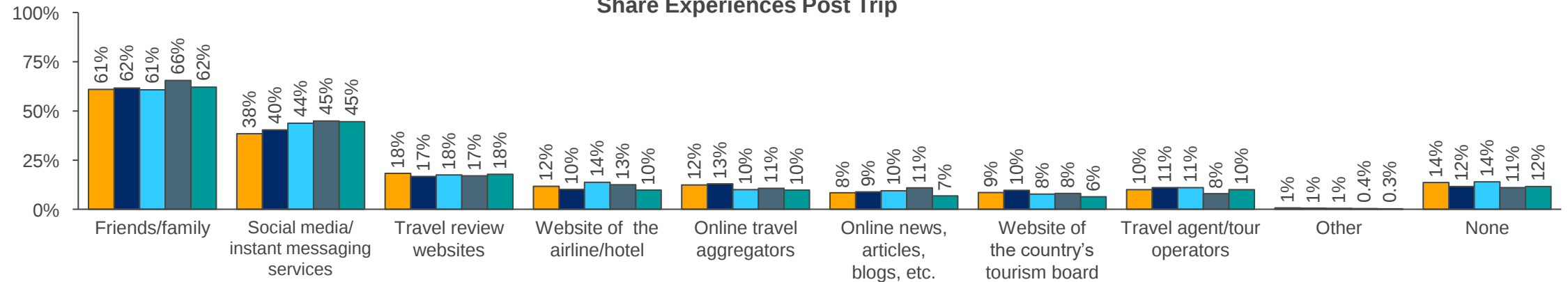
Role of Media Channels at Different Stages of International Leisure Trip
(based on all respondents)

Nov-22 Feb-23 Jun-23 Oct-23 Feb-24

Share Experiences During The Trip



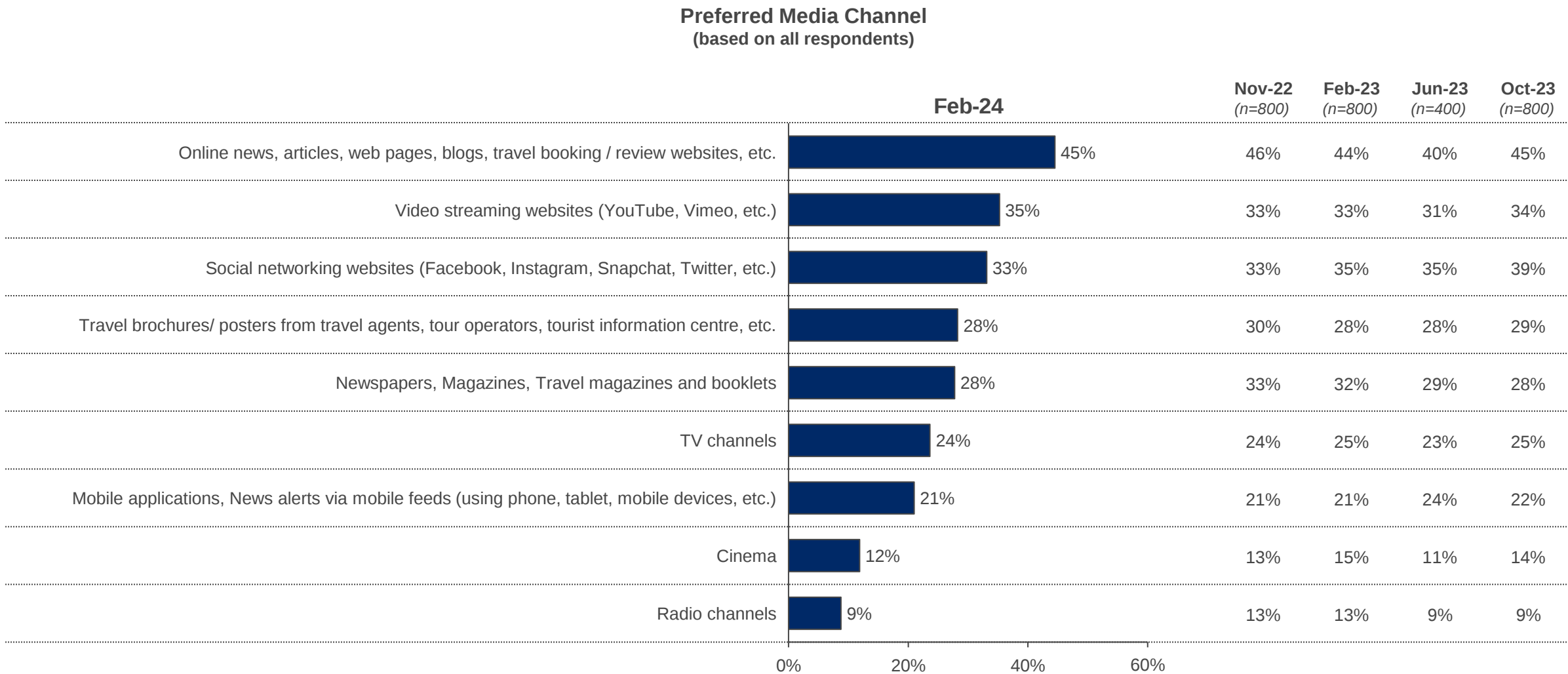
Share Experiences Post Trip



Based on all respondents: Nov-22: (n=800) Feb-23: (n=800) Jun-23: (n=400) Oct-23: (n=800) Feb-24: (n=800)

Role of Media Channels at different stages (Q12d): For your most recent trip, which of the following sources did you use at different stages of the trip? (Choose all that apply)

Preferred Media Channel



Based on all respondents: (n=800)

Preferred media channels (Q43a): To what extent do you prefer the following channels for travel and tourism related promotional material? Please answer on a scale of 1 to 7 where 1 means 'Not at All Preferred' and 7 means 'Highly Preferred' (Percent rating of 6 or 7 on a 1–7 scale)

Travel Attitudes | Total

Travel Attitudes: Total (Percent Strongly Agree)	Nov-22 (n=800)	Feb-23 (n=800)	Jun-23 (n=400)	Oct-23 (n=800)	Feb-24 (n=800)
Travel Attitudes: Aspirations					
Some of my most important life goals involve travel experiences I want to have	52%	47%	45%	49%	46%
I expect to travel internationally more in the future than I do now	37%	37%	38%	36%	33%
Travel Attitudes: Adoption					
I find change exciting	26%	26%	29%	25%	25%
I am one of the first people I know to try something new	19%	17%	16%	17%	16%
Once I find something I like I tend to stick with it	21%	17%	13%	18%	15%
Travel Attitudes: Barriers					
Traveling internationally is a luxury	33%	36%	44%	41%	39%
The threat of global terrorism affects where I consider traveling internationally	30%	29%	26%	40%	33%
I would spend more money to travel to a destination that I know is safe	33%	32%	35%	38%	30%
I worry about how I may be treated in foreign countries due to my country's policies	15%	14%	19%	14%	16%
I would prefer visiting a country that is promoting eco-friendly policies	16%	13%	14%	13%	12%
I would rather visit a country that I am familiar with, as a tourist, than experiment by visiting a place that I am not familiar with	12%	11%	8%	9%	9%
Travel Attitudes: Economics					
I am now more likely to save money than to use it to travel internationally	16%	17%	13%	16%	13%
I invest more of my extra money in my home than I used to	15%	13%	15%	14%	12%
I am spending less money on travel in favor of other forms of entertainment (eating out, movies, amusement parks, etc.)	11%	12%	12%	10%	10%
Travel Attitudes: Time & Distance					
I don't mind increasing my travel time for a cheaper airfare	23%	19%	22%	22%	17%
I am traveling closer to home than I used to	14%	12%	10%	11%	11%
I am taking shorter, more frequent trips than I used to	12%	11%	10%	10%	10%
Travel Attitudes: Travel Behavior					
I purchase travel packages that include airfare and hotel as one price for my short distance trips	13%	12%	12%	13%	12%
I prefer group tours for my long distance international trips	13%	11%	10%	10%	11%

Based on all respondents

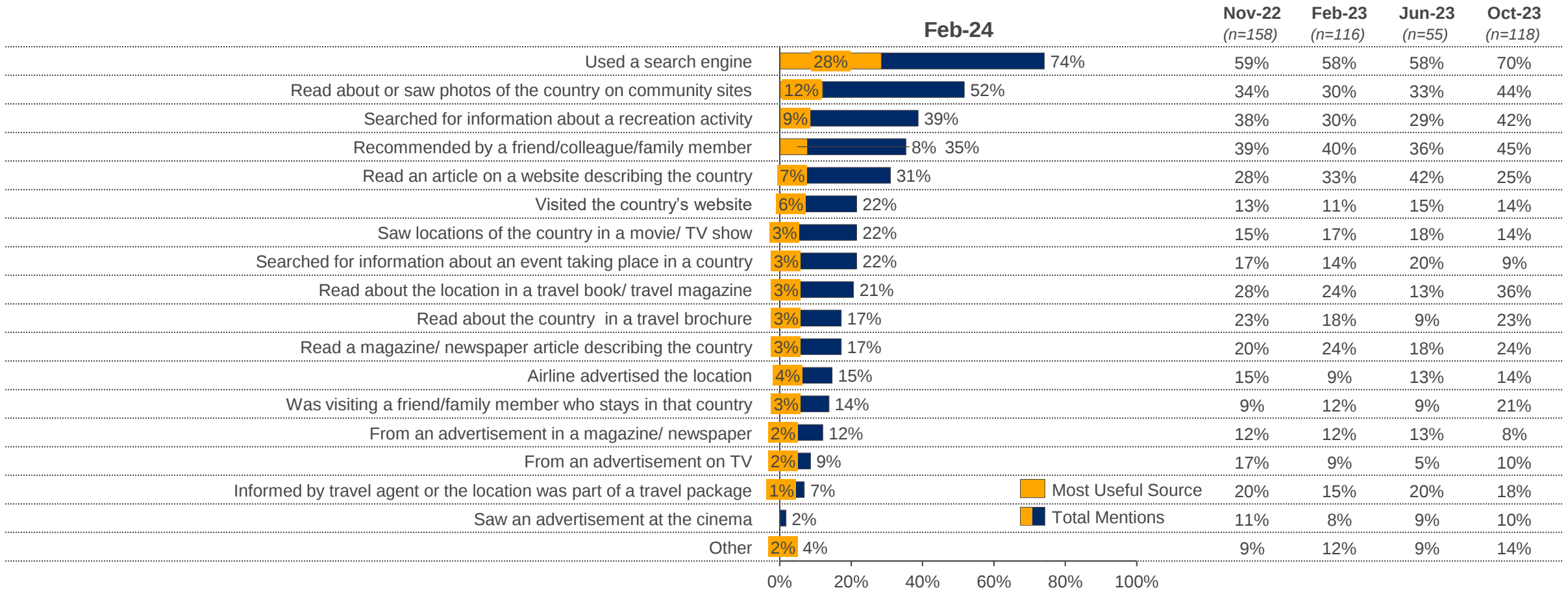
Travel Attitudes (Q44a): To what extent do you agree or disagree with the following statements? (Strongly Agree, Agree Somewhat, Disagree Somewhat, Strongly Disagree)

| SOUTH AFRICAN TRAVEL





Sources of Travel Information
(based on those who have sought leisure travel information on South Africa in the past 18 months)



⚠ Warning some bases below 75

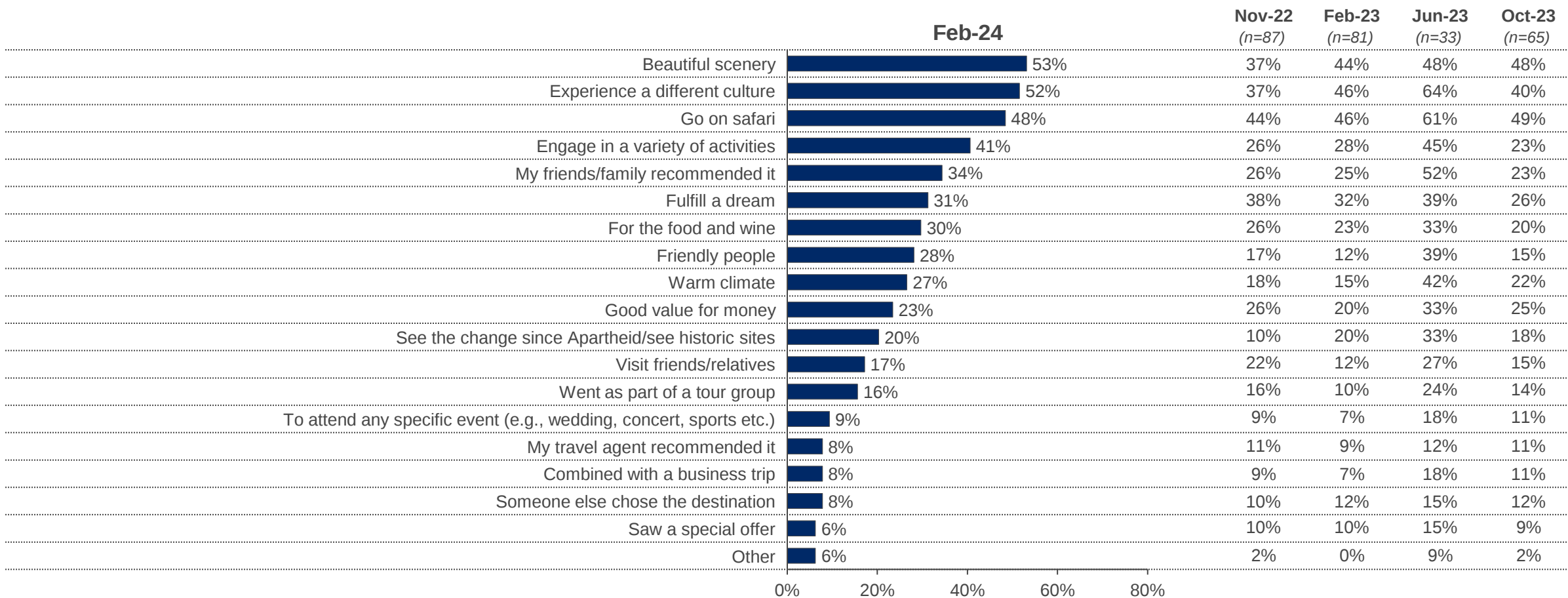
Based on respondents who have sought leisure travel information on South Africa in the past 18 months (n=116; 15% of all respondents)

Information Sources (Q16d/c): Which of the following sources of information have you used/ came across to obtain leisure travel information about each of these countries in the last 18 months? (Select all that apply). Which of the following was the most useful source of information that you used/ came across to seek leisure travel information about these countries? (Single Select)

Reasons for Visiting South Africa for Leisure



Reasons for Visiting South Africa
(based on those who have visited South Africa for leisure in the past 5 years)



⚠ Warning some bases below 75

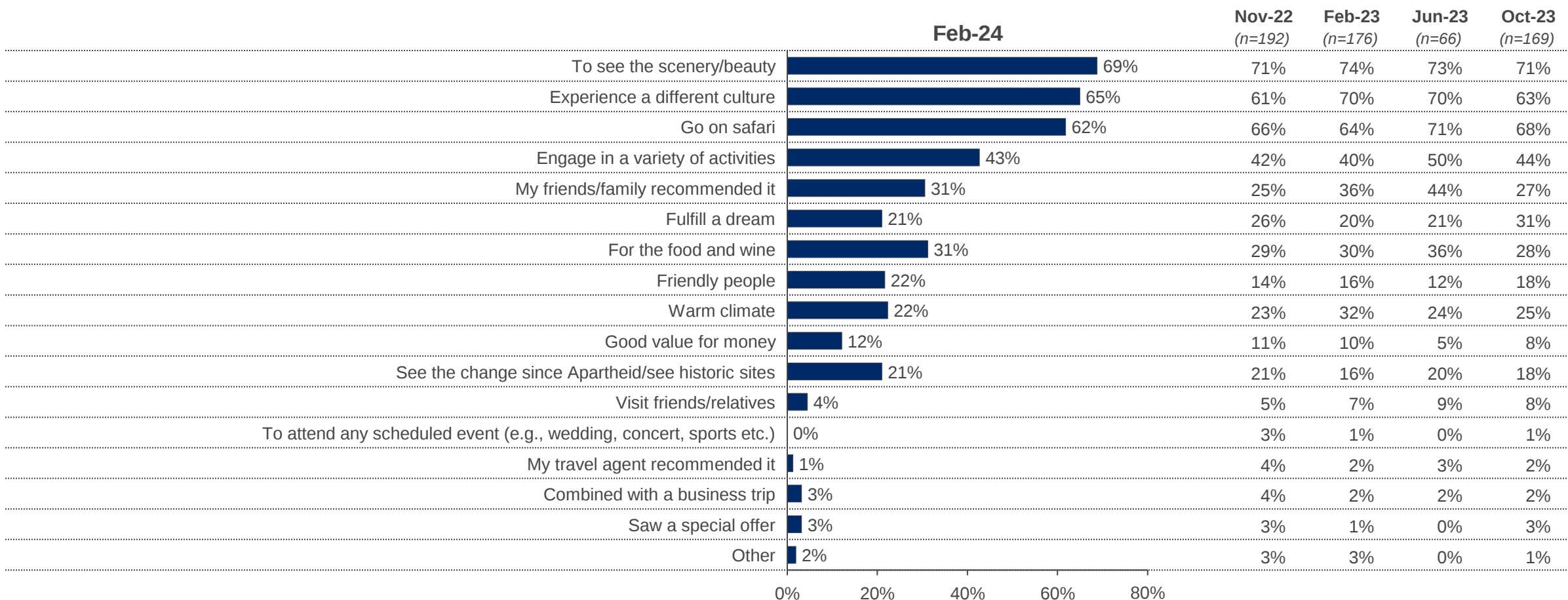
Based on those who have visited South Africa for leisure in the past 5 years (n= 64; 8% of all respondents)

Reasons for Visiting South Africa (Q35a): Why did you choose to visit South Africa as a destination for leisure purposes? (Select all that apply)

Reasons for Interest in South Africa



Reasons for Interest in Leisure Visit to South Africa in the Future
(based on those who have not visited South Africa in the past 5 years, but intend to in the future for leisure)



Warning some bases below 75

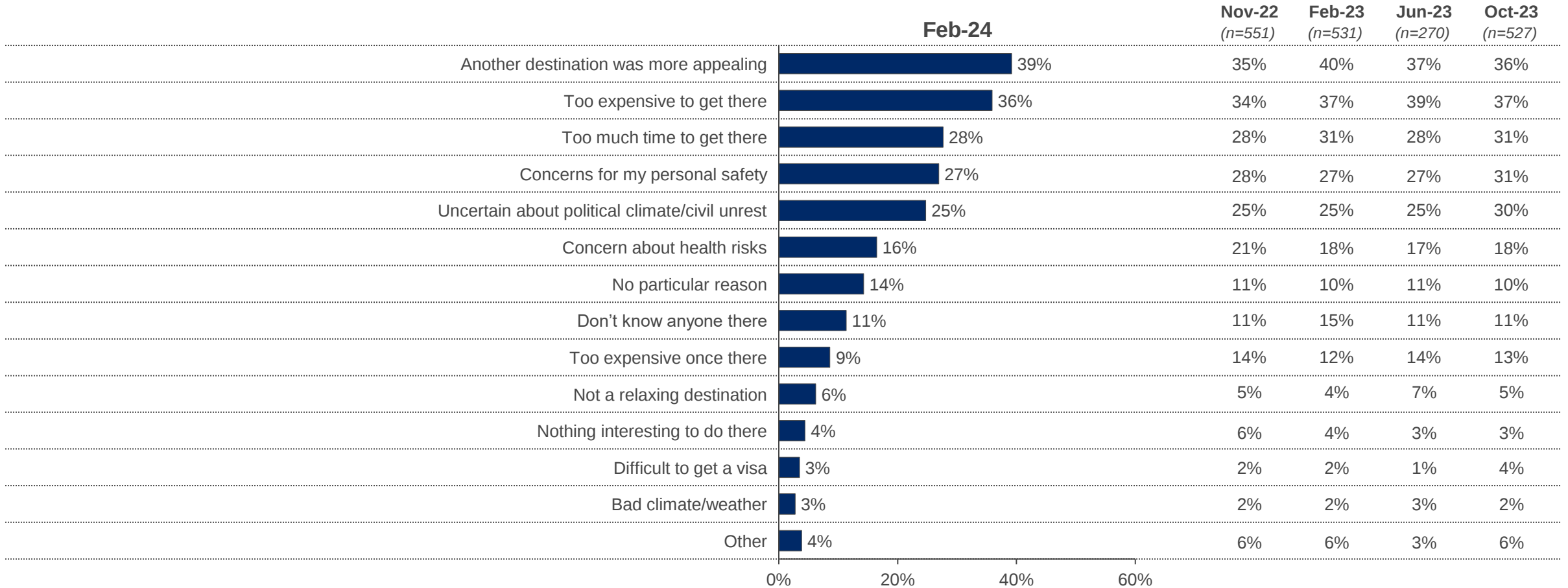
Based on those who have not visited South Africa in the past 5 years, but intend to in the future for leisure (n=157; 20% of all respondents)

Interest in South Africa (Q42): Why are you interested in visiting South Africa for leisure purposes in the future? (Select all that apply)

Note: The sequence of the attributes is consistent with the reasons for visiting (previous slide), to allow better comparison across attributes

Reasons for Not Visiting South Africa for Leisure in Past 5 Years

Reasons for Not Visiting South Africa
(based on those who have not visited South Africa in the past 5 years for either business or pleasure)



Based on those who have not visited South Africa in the past 5 years for either business or pleasure (n=546; 68% of all respondents)

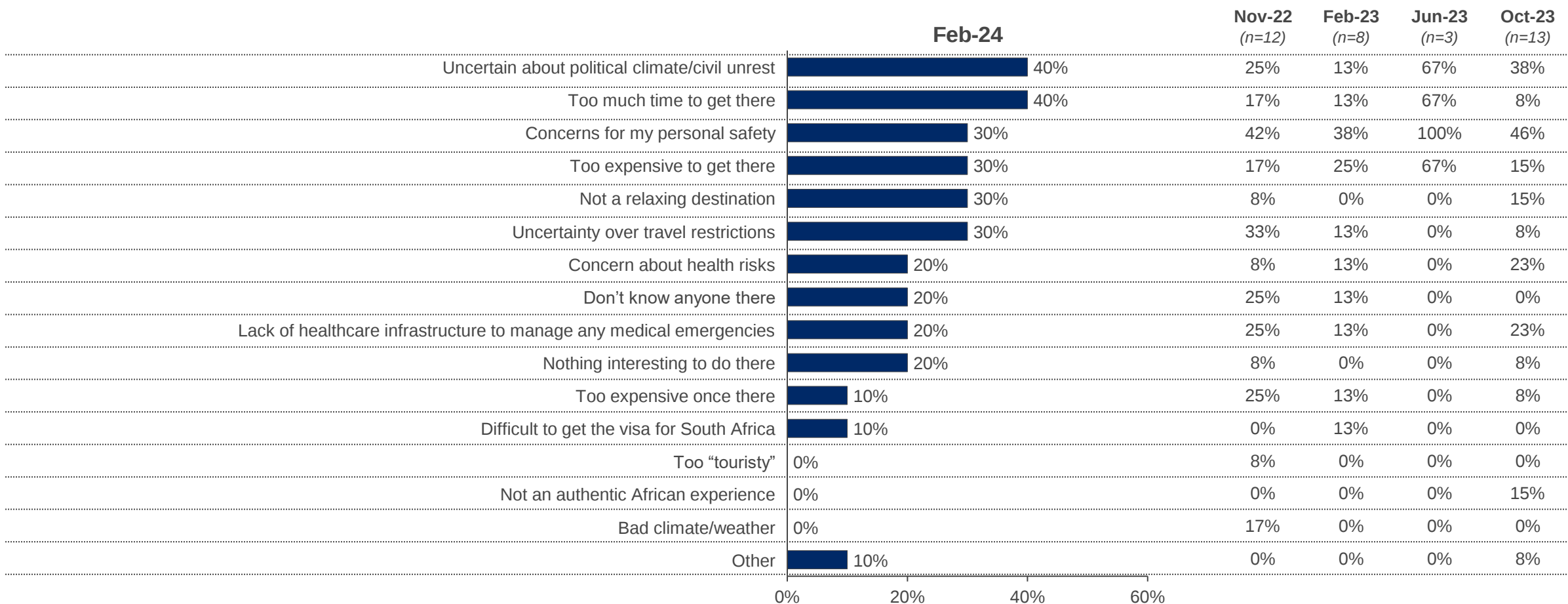
Reasons for Not Visiting South Africa (Q34): Why haven't you visited South Africa for leisure purposes in the past 5 years? (Select all that apply)



Reasons for Not Recommending



Reasons for Not Recommending South Africa
(based on those who have visited South Africa in the past 5 years for either business or pleasure but do not recommend it)



⚠ Warning some bases below 75

Based on those who have visited South Africa in the past 5 years for either business or pleasure, but do not recommend it to family and friends (n=10; 1% of all respondents)

Reasons for Not Recommending (Q33): Why wouldn't you recommend South Africa as a destination for leisure purposes to your family and friends? (Select all that apply)

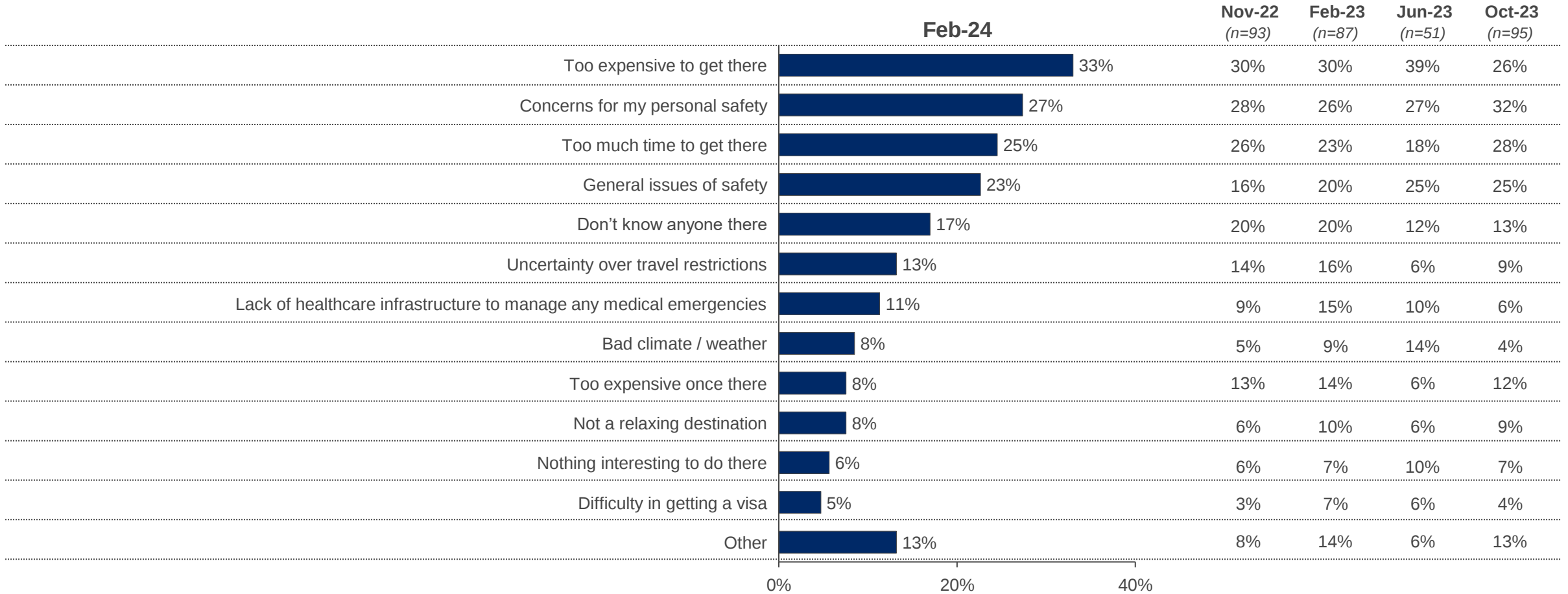
Note: A few attributes were added in Sep-22 wave such as 'lack of healthcare infrastructure to manage any medical emergencies'

Rejecting a Leisure Destination



Reasons for Rejecting a Destination After Researching It

(based on those who have visited South Africa for leisure in past 5 years or have sought information on South Africa but have no intent to visit in the future)



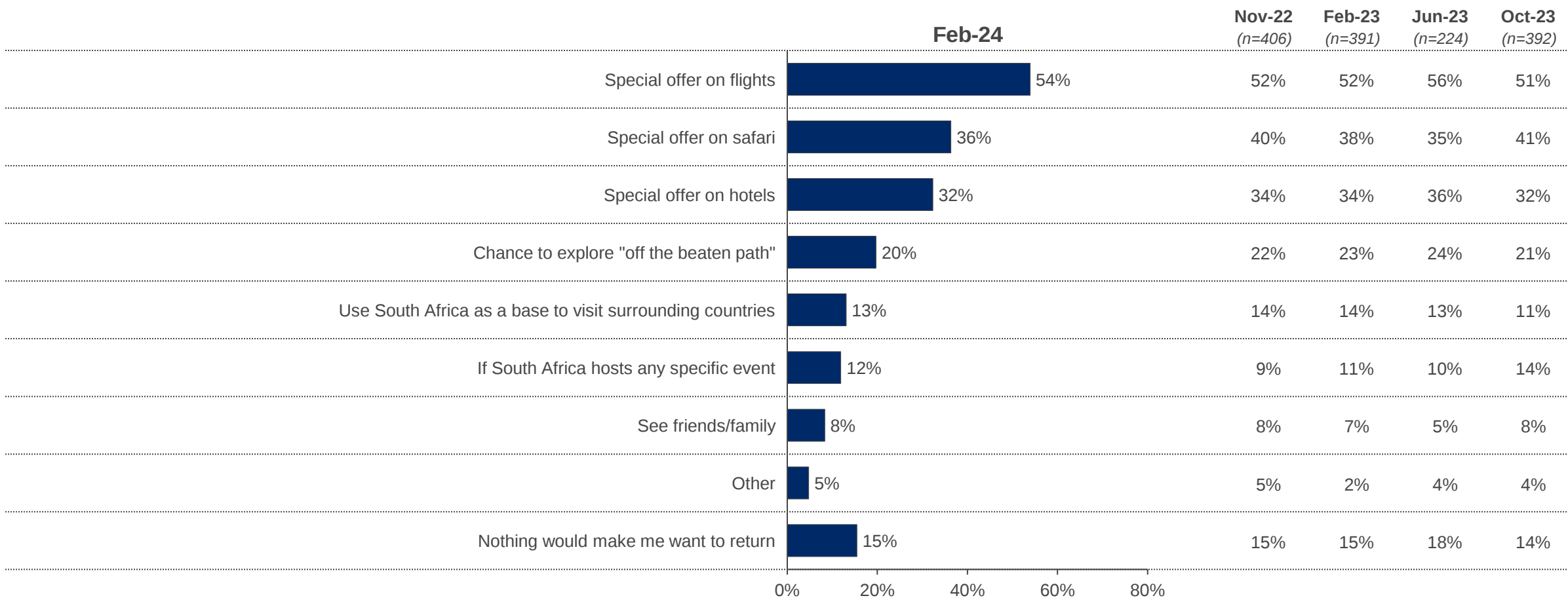
⚠ Warning some bases below 75

Based on respondents who have visited South Africa for leisure in past 5 years or have sought info but have no intent to visit in the future (n=106; 13% of all respondents)

Reasons for Rejection (Q16e): After seeking information about this country, why are you no longer planning to visit this country for leisure travel? (Select all that apply)

Encourages Future Visitation

Encourage First Time* Visitation to South Africa
(based on those who have not visited South Africa for leisure in the past 5 years and do not intend to in the future)



Based on those who have not visited South Africa in the past 5 years and do not intend to in the future (n=421; 53% of all respondents)

Encourage Visitation (Q40): What, if anything, would encourage you to visit South Africa for leisure purposes in the future? **(Select all that apply)**

* Have not been in the last five years





THANK YOU