

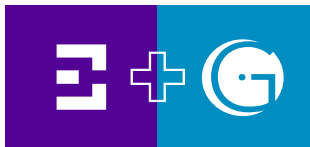


Brand Performance in China

February 2025

800 Respondents

March 28, 2025



SA Tourism **BrandTracker**





Brand Journey

- South Africa's performance on all the conversion curve attributes has improved or remained stable since the past wave except for 'Have visited in last 18 months'.
- 'Likeability/ Positivity' has recorded the highest improvement, followed by 'Total Awareness' and 'Plan to Gather Information'.
- South Africa's 'Closure Ratio' has declined slightly since the last wave.

Brand Knowledge

- South Africa's performance across all functional and emotional attributes has improved since the Oct-24 wave
- 'Cultural Experience' has recorded the highest improvement, followed by 'Less Crowded Getaways', 'Variety of Experiences' and 'Good Healthcare Infrastructure'
- Most of the performance and personality attributes have been rated lower than the average scores of all destination

Meta-perception

- South Africa's scores for all the meta perception attributes have improved since the past wave
- 'Suitability' has recorded the highest improvement, followed by 'Affordability'
- Most meta-perception attributes have been rated lower than the average scores of all destinations

BRAND KNOWLEDGE



South Africa Rank Versus All Destinations | Across Competitors

South Africa Ranks Versus All Destinations – Feb-25

	South Africa (n=270)	Australia (n=133)	Egypt (n=135)	Kenya (n=130)	Brazil (n=133)	USA (n=136)	UK (n=130)	Italy (n=130)	France (n=133)	Germany (n=132)	New Zealand (n=133)
Memorable	6	2	8	11 ✖	10	1 ★	3	5	9	7	4
Adventurous	2	7	6	5	8	1 ★	3	9	10	4	11 ✖
Offers a Wildlife Experience	2	1 ★	10	8	6	5	4	11 ✖	9	7	3
Welcoming People You Can Interact With	4	1 ★	9	11 ✖	10	7	3	6	5	8	2
Offers a Wide Variety of Experiences	6	2	10	11 ✖	9	3	4	5	8	1 ★	7
Breath-taking	1 ★	3	6	10	8	2	7	5	9	4	11 ✖
Enriching	8	1 ★	6	11 ✖	10	2	3	5	9	4	7
A Very Authentic Travel Experience	6	2	9	11 ✖	10	1 ★	7	3	4	5	8
Offers Excellent Value for the Money	3	5	2	10	11 ✖	1 ★	9	7	8	4	6
Is a Safe & Secure Environment	8	1 ★	9	10	11 ✖	4	5	7	6	2	3

■ Top Desirable Performance and Personality Associations

★ 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 Rank Versus All Destinations | Longitudinal

South Africa Ranks Across Waves

	Oct-23 (n=263)	Feb-24 (n=262)	Jun-24 (n=134)	Oct-24 (n=274)	Feb-25 (n=270)
Memorable	9	10	4	10	6
Adventurous	7	8	4	4	2
Offers a Wildlife Experience	5	4	1 ★	7	2
Welcoming People You Can Interact With	8	10	5	9	4
Offers a Wide Variety of Experiences	9	8	3	11 ✖	6
Breath-taking	1 ★	9	2	3	1 ★
Enriching	9	10	3	10	8
A Very Authentic Travel Experience	5	11 ✖	3	9	6
Offers Excellent Value for the Money	9	8	4	8	3
Is a Safe & Secure Environment	10	10	9	9	8

□ Top Desirable Performance and Personality Associations

★ Highest Rank

✖ Lowest Rank

■ Significantly Above Average (at 95% confidence level)

■ Significantly Below Average (at 95% confidence level)

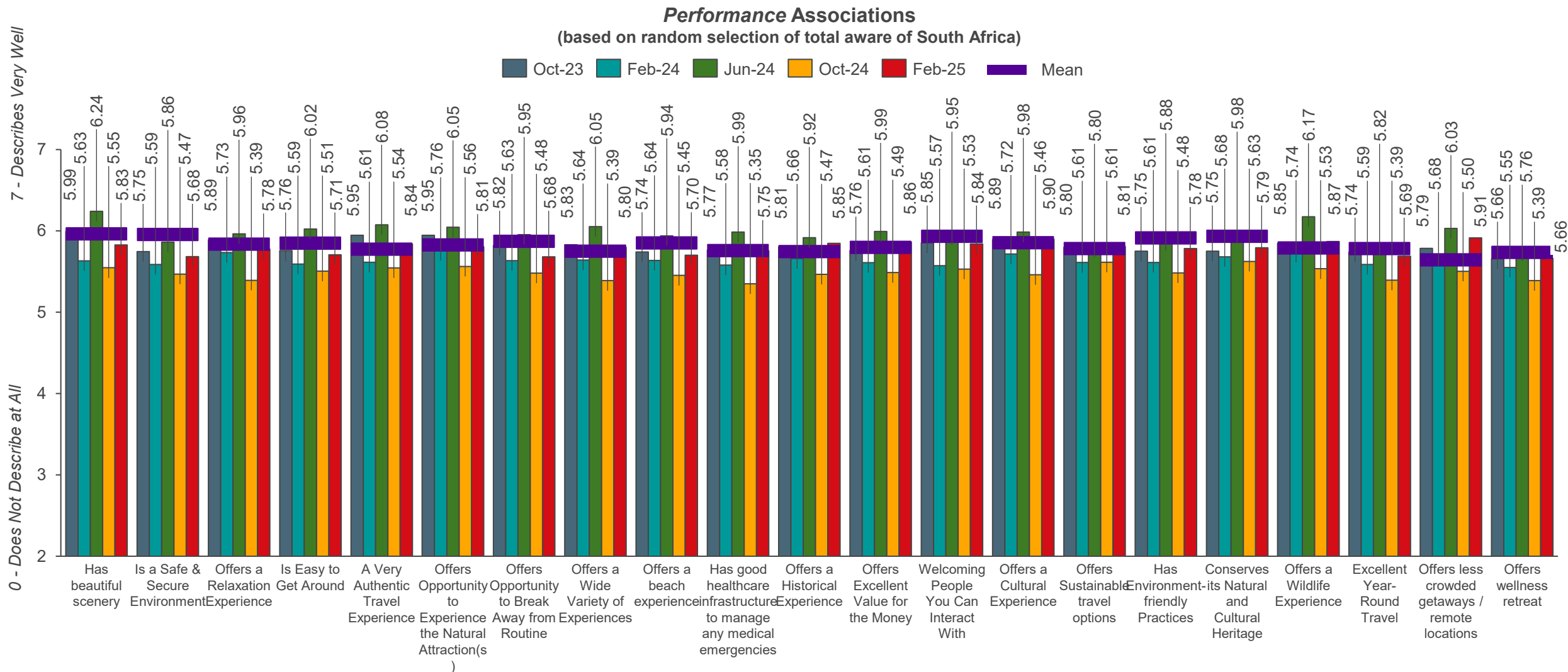
Based on a random selection of total aware of each country as an international destination for leisure purposes

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



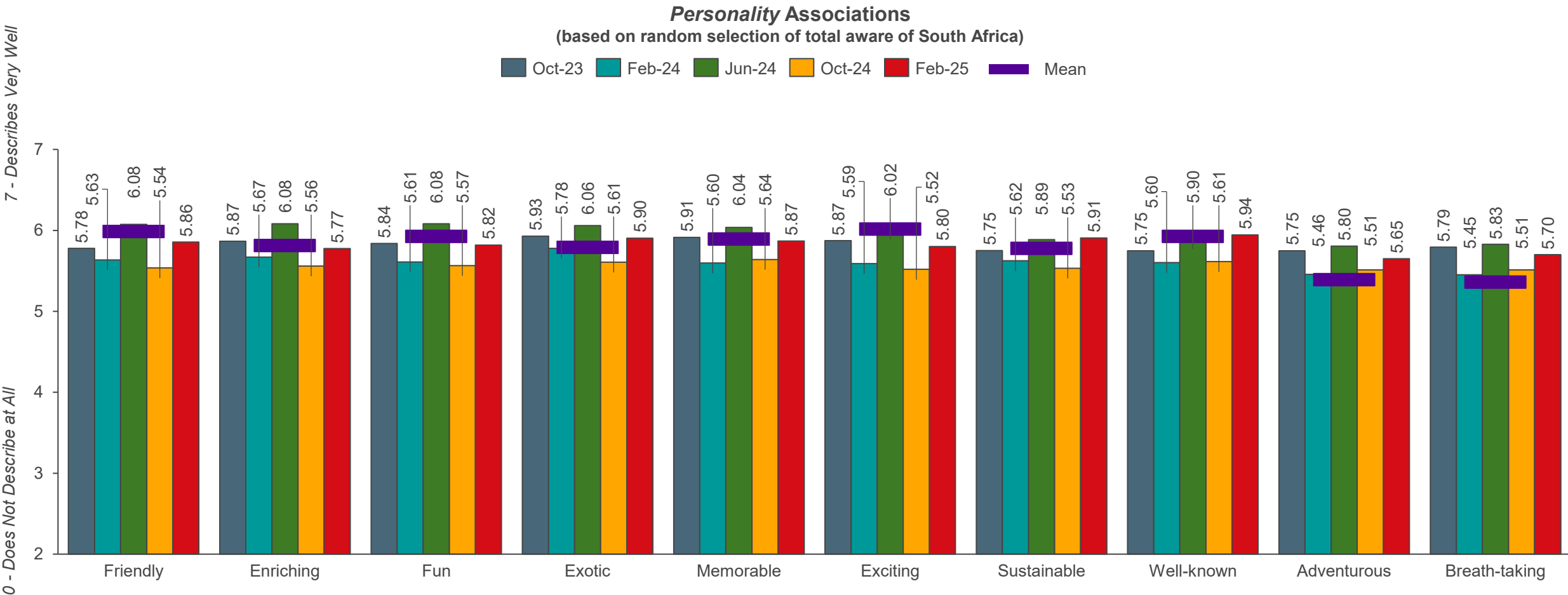
Based on a random selection of those aware of South Africa: Oct-23: (n=263); Feb-24: (n=262); Jun-24: (n=134); Oct-24: (n=274); Feb-25: (n=270)

Mean: The average rating for all destinations on this measure in February 2025 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: Oct-23: (n=263); Feb-24: (n=262); Jun-24: (n=134); Oct-24: (n=274); Feb-25: (n=270)
Mean: The average rating for all destinations on this measure in February 2025 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”.
SAT - Feb-25 - China Market Report



BRAND JOURNEY



South Africa Rank Versus All Destinations | Longitudinal

South Africa Ranks Across Waves

	Oct-23	Feb-24	Jun-24	Oct-24	Feb-25
Total Awareness	10	9	10	10	9
Unaided Awareness	8	9	9	9	8
Positivity	10	9	10	10	8
Likely to Visit in Future	8	6	9	8	8
Likely to Seek Info	9	8	10	9	8
Uniqueness	8	7	7	6	4
Stature	8	8	8	6	6
Sought Info	8	8	8	8	8
Familiarity	8	9	8	9	8
Suitability	8	8	8	6	6
Likely to Visit in Next 18 Months	7	8	9	8	7
Closure Ratio	5	9	8	4	8



Highest Rank



Lowest Rank



Significantly Above Average (at 95% confidence level)



Significantly Below Average (at 95% confidence level)



Based on all respondents: Oct-23: (n=800); Feb-24: (n=800); Jun-24: (n=400); Oct-24: (n=800); Feb-25: (n=800)
SAT - Feb-25 - China Market Report



South Africa Rank Versus All Destinations | Across Competitors

South Africa Ranks Versus All Destinations –Feb-25

	South Africa	Australia	Egypt	Kenya	Brazil	USA	UK	Italy	France	Germany	New Zealand
Total Awareness	9	1 ★	8	11 ✖	10	4	6	5	3	7	2
Unaided Awareness	8	3	9	10	11 ✖	1 ★	5	6	2	7	4
Positivity	8	1 ★	9	11 ✖	10	4	6	5	2	7	3
Likely to Visit in Future	8	1 ★	9	11 ✖	10	3	6	5	4	7	2
Likely to Seek Info	8	1 ★	9	11 ✖	10	4	6	5	3	7	2
Uniqueness	4	1 ★	9	11 ✖	10	5	7	6	3	8	2
Stature	6	1 ★	10	11 ✖	9	7	4	5	3	8	2
Sought Info	8	1 ★	10	11 ✖	9	4	5	6	3	7	2
Familiarity	8	2	10	11 ✖	9	4	5	6	1 ★	7	3
Suitability	6	1 ★	10	11 ✖	9	4	7	5	2	8	3
Likely to Visit in Next 18 Months	7	1 ★	9	10	11 ✖	3	6	5	4	8	2
Closure Ratio	8	2	10	5	11 ✖	1 ★	7	6	3	9	4



Highest Rank



Lowest Rank



Significantly Above Average (at 95% confidence level)



Significantly Below Average (at 95% confidence level)



Based on all respondents: Feb-25: (n=800)
SAT - Feb-25 - China Market Report

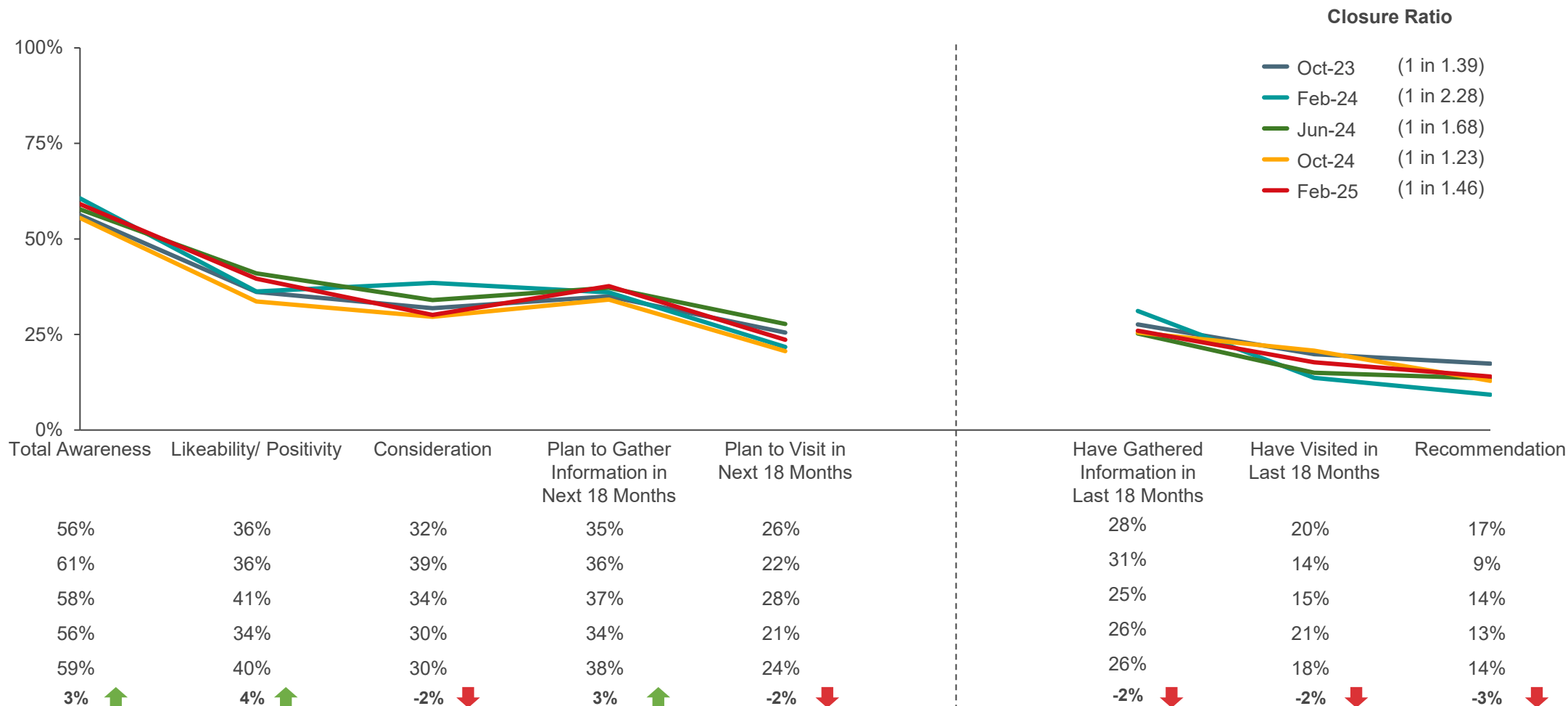


CONVERSION CURVE



South Africa Longitudinal Conversion Curve | Total

South Africa Conversion Curve Across Waves — Total



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

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;

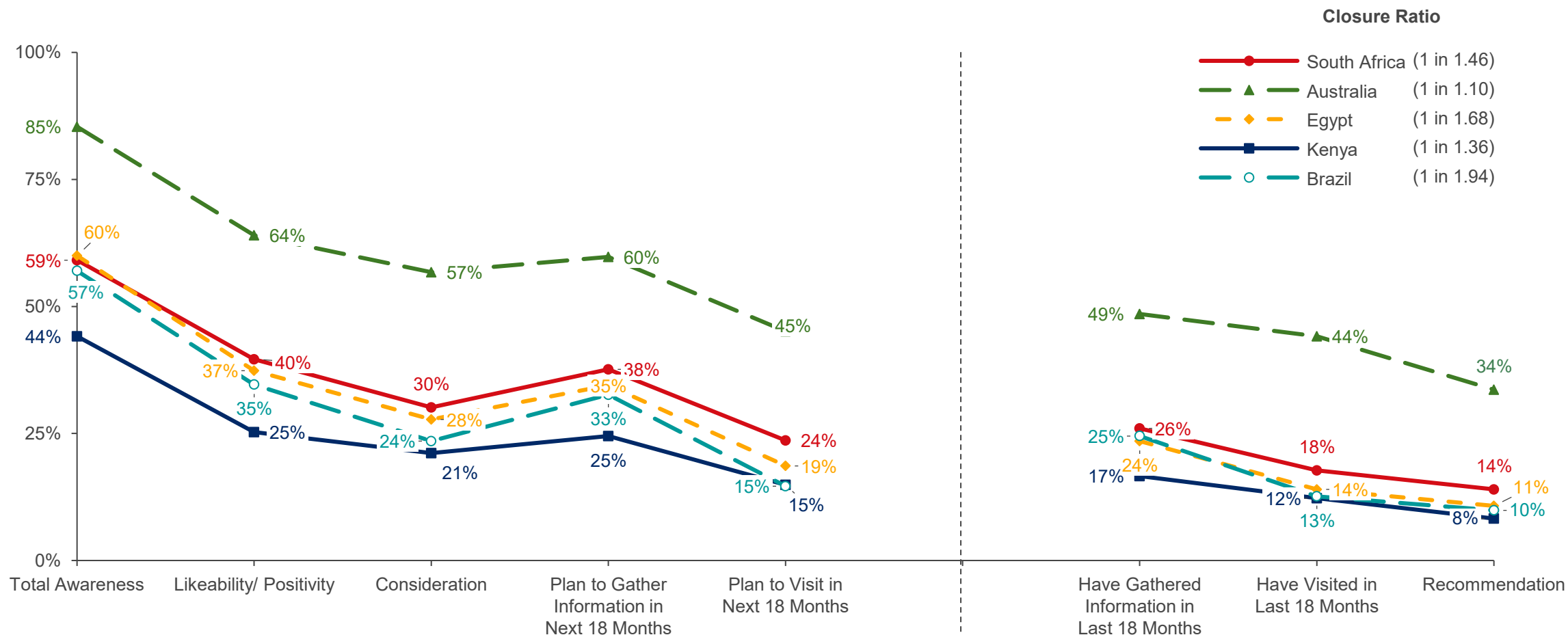
Likeability/Positivity, Plan to Gather Information in Next 18 Months, and Plan to Visit in Next 18 Months based on ratings of 6 or 7 on a 7-point scale.

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



South Africa Competitive Conversion Curve | Total

South Africa Competitive Conversion Curve — Total Feb-25



Based on all respondents: (n=800)

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

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.

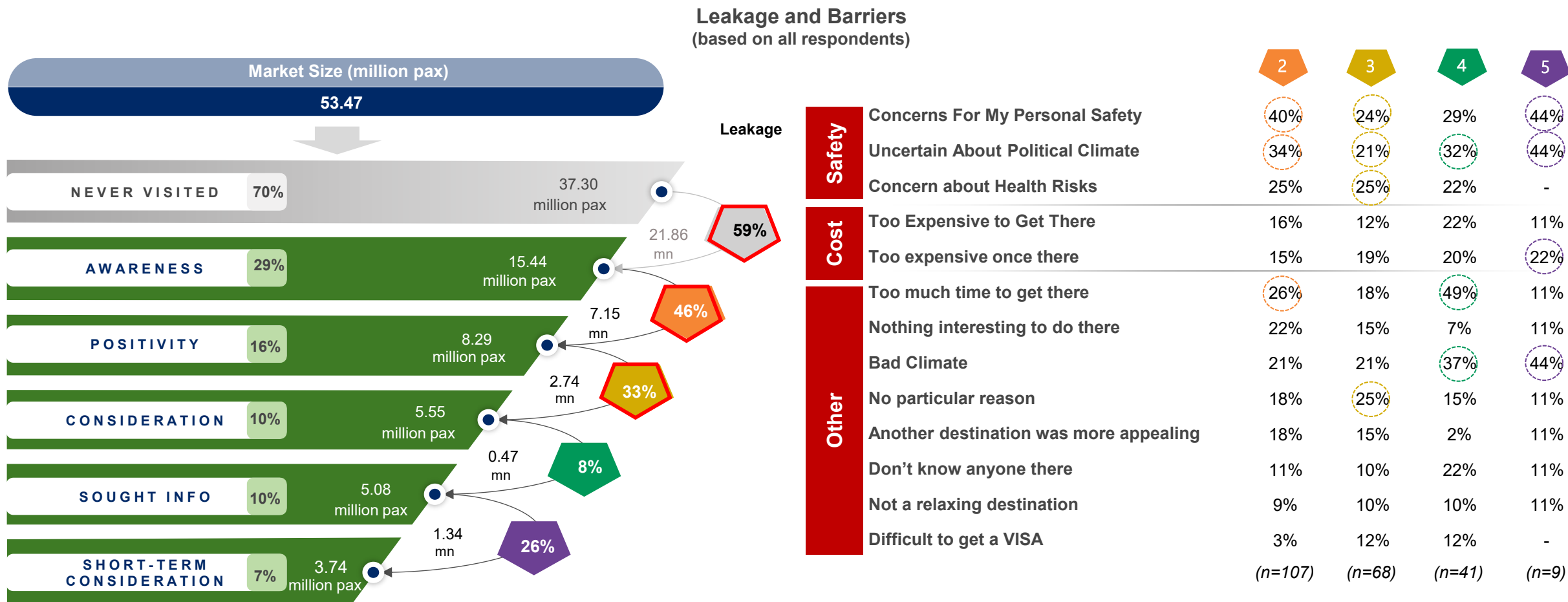
Note: For all questions, the percentages are based on total respondents not the awareness base for the destination; Recommendation is calculated based on the respondents who have recently visited the destination



CONVERSION LEAKAGE ANALYSIS



Leakage at Stages of the Brand Journey | Barriers



⚠ Warning some bases below 75
Based on all respondents: Feb-25: (n=800)

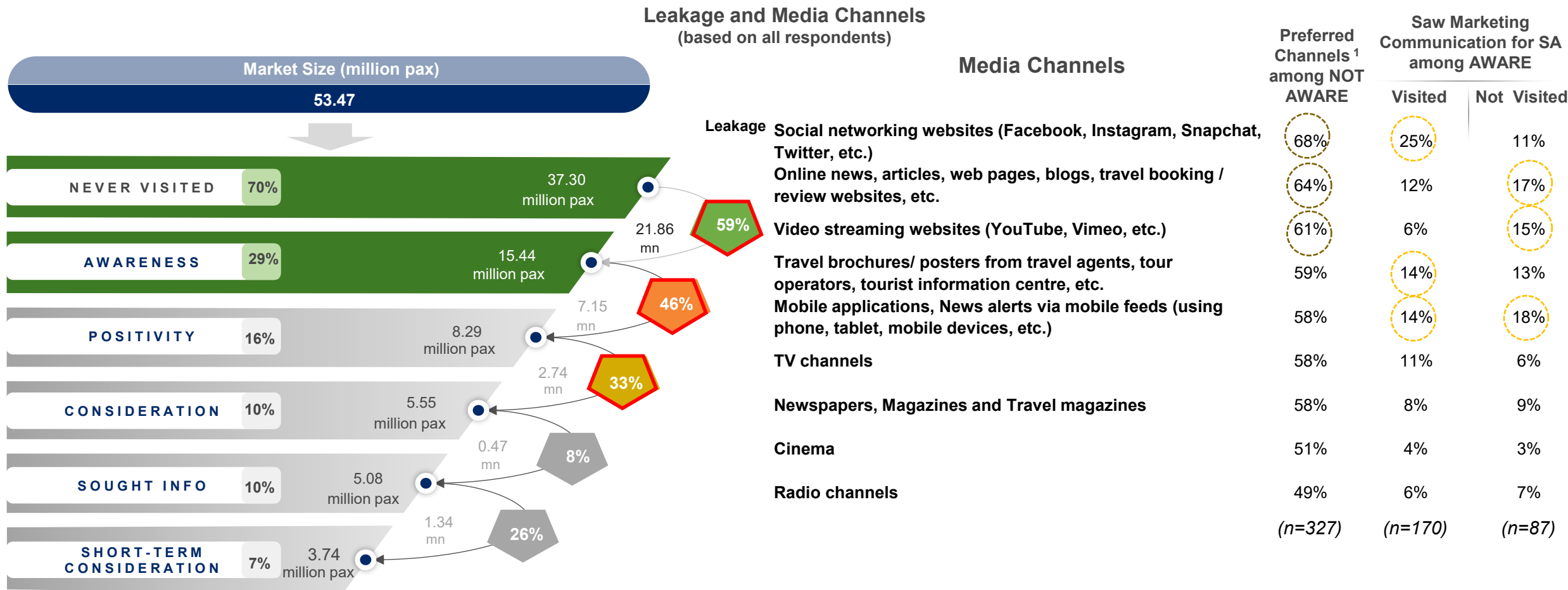
Customer Conversion (Based on Q9, Q29, Q14, Q17, Q15, Q16a and Q16b): Based on those that have travelled internationally in the last 5 years; Respondents to likeability limited to quota; Likeability/Positivity, Plan to Gather Information in Next 18 Months, and Plan to Visit in Next 18 Months based on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

Leakage is calculated by subtracting each subsequent metric from the previous metric. For example, Total Awareness percent minus Likeability/Positivity percent equals Leakage between Awareness and Likeability
Barriers (Based on Q34) Reasons for Not Visiting South Africa: Why haven't you visited South Africa for leisure purposes in the past 5 years? (Select all that apply)

Note: All market sizes are for the 'Never Visited' category in the market; All calculations have been done using absolute values, and not the rounded off values. The million pax at different stages are calculated based on those who are aware of South Africa, and the barriers are based on the leakages at different stages



Leakage at Stages of the Brand Journey | Media Channels



Based on all respondents: Feb-25: (n=800)

Customer Conversion (Based on Q9, Q29, Q14, Q17, Q15, Q16a and Q16b): 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

Leakage is calculated by subtracting each subsequent metric from the previous metric. For example, Total Awareness percent minus Likeability/Positivity percent equals Leakage between Awareness and Likeability

Media Channels (Based on Q43a and Q10b): Impact of preferred media channels and saw marketing communication

Note: ¹Preferred channels for viewing travel and tourism related promotional material, and it is a rating question. All rating questions have been analyzed using top 2 box approach.

The million pax at different stages are calculated based on those who are aware of South Africa