

AGENCY TENDER BRIEF: INTEGRATED PUBLIC RELATIONS AND MARKETING AGENCY

NORTH EUROPE: THE NETHERLANDS, BELGIUM AND SWEDEN

June 2025



SOUTH AFRICAN TOURISM

BRIEF AND EXPECTED OUTCOMES



SOUTH AFRICAN TOURISM

NORTH EUROPE - INTEGRATED MARKETING AND PUBLIC RELATIONS AGENCY BRIEF



EXPECTED OUTCOMES FROM THIS BRIEF:

CREATIVE EXECUTION AND CAMPAIGN

- Big idea
- Outlining of insights to support big idea - please refer to all data provided for localization areas, barriers and in insights
- Creative execution elements of big idea, inclusive of PR
- Localisation to the 3 markets of big idea (Netherlands, Belgium and Sweden) Incorporation of PR and trade strategies to support big idea
- Activations/Event management approach linked to big idea



SOUTH AFRICAN TOURISM

NORTH EUROPE 2024/25 - AGENCY BRIEF

EXPECTED OUTCOMES FROM THIS BRIEF:

TERRITORIES AND INVESTMENT PRINCIPLES

- Please include x 3 countries in this hub on the following principle and breakdown (in accordance with arrivals stats per hub):
 - Netherlands - 70%
 - Belgium 20%
 - Sweden 10%

COSTING EXPECTATIONS - Elements to be included when providing pricing principles:

- Provide a detailed rate card for the services to be charged for outlined deliverables in scope of services. Please feel free to add any services along with the associated charges you deem appropriate. You can create sub sections for each line item if need be (please refer to and use annexure H for formatting of this rate card)
- Provide the percentage of the management fee for all the outsourced services
- In accordance with illustrative budget provided, please provide a cost breakdown for a campaign concept as per brief you have delivered on for pitch purposes, outlining agency fee vs third party/ Out of pocket costs
- Please populate Annexure H with all relevant costs



PERFORMANCE SUMMARY 2024/25

HUB 2024/25 PERFORMANCE SUMMARY - NORTH EUROPE ARRIVALS

COUNTRY	ARRIVAL NUMBERS JAN - DEC 2024	% DIFFERENCE FROM 2023	% DIFFERENCE FROM 2019
NETHERLANDS	132 422	0.8% +	9% shortfall on 2019 arrivals
BELGIUM	45 225	2.4% -	14% shortfall on 2019 arrivals
SWEDEN	24 562	0.1% +	41% shortfall on 2019 arrivals

HUB 2024/25 PERFORMANCE SUMMARY - NORTH EUROPE SPEND

COUNTRY	SPEND NUMBERS JAN - DEC 2023	% DIFFERENCE FROM 2022
NETHERLANDS	R 2 854 894 535	7.9% -
BELGIUM	R 813 401 692	15.9% -
SWEDEN	R 485 027 210	17.1% -

GLOBAL BRAND CAMPAIGN - COME FIND YOUR JOY



SOUTH AFRICA AWAITS

COME FIND

YOUR JOY

Building Towards a Joy-Led Global
Marketing Programme

Reimagining Travel Through the Lens of Childlike Wonder



SOUTH AFRICAN TOURISM

CAMPAIGN OBJECTIVES

Brand Purpose

To awaken the world's sense of joy by inviting travellers to rediscover wonder, connection, and meaning in South Africa.

CAMPAIGN OBJECTIVES

1

Inspire emotionally-driven travel to South Africa.



2

Improve brand warmth and perception.



3

Increase international arrivals across key markets



STRATEGIC FOUNDATION

HUMAN INSIGHT:

People across the world are experiencing **collective emotional fatigue**. There's a universal longing to **reconnect** with what makes us **feel alive**. The childlike joy we once knew is not lost—it's waiting to be **rediscovered**.

BRAND ROLE:

Position South Africa as the place where one can reconnect with **awe, joy, freedom**, and meaning—through authentic local encounters, immersive landscapes, and **emotional richness**.

KEY MESSAGE:

South Africa Awaits. Come Find Your Joy.

SOUTH AFRICA AWAITS
COME FIND
YOUR JOY



BRAND EXPERIENCE FRAMEWORK



BRAND PURPOSE:

To awaken the world's sense of joy by inviting travellers to rediscover wonder, connection, and meaning in South Africa.

BRAND COMMUNICATION PLATFORM:

South Africa Awaits – Come Find Your Joy!

GLOBAL BRAND CAMPAIGN

Brand Activity
Pillars

Power
Embracing
Tension/Barrier

Brand
Role

Desired
Response

Campaign
Type

Brand Tone of
Voice

Embrace POTENTIAL TRAVELLERS

Tourism is more than travel — it's a catalyst for opportunity, growth, and meaningful connection. By stepping into the sector, individuals unlock the power to shape stories, create experiences, and contribute to a thriving South Africa.

NEGATIVE PERCEPTIONS

Travel to South Africa is often misunderstood — with concerns around safety, infrastructure, and accessibility clouding its true potential. These perceptions don't reflect the rich, world-class experiences that await. It's time to change the narrative.

AWAKEN NEW PERCEPTIONS

To shift perceptions of South African travel, we must share real, joyful experiences that reflect the country's warmth, diversity, and world-class appeal. Come Find Your Joy invites the world to see South Africa not through fear, but through wonder — turning misconceptions into meaningful moments of discovery.

I have a new Story to tell about My South Africa

Through the line Global Campaign

MEDIA APPROACH

Media OBJECTIVE: Engagement & Travel Insights

Targeting
Travel enthusiasts
South Africa

Using different.
Channels to gain
reach and
potential
Travelers

Focus on
communicating
"come find your
joy"

Channel Mix:
Digital, Social Media, Radio, Recruitment flyers, vehicle
branding (ambient), Newsletters, Brochure, and activations

TARGET AUDIENCE



International
25 - 55
Leisure Travelers

Young
professionals,
content creators,
travel influencers,
and local families.

Middle-class and
aspirational
travellers from
neighboring African
countries.

Warm | Inviting | Emotive | Conversational & Relatable | Uplifting & Joyful | Empowering & Inclusive



SOUTH AFRICAN TOURISM

Europe 2025/26 - Executing EXCEPTIONALISM

North Europe are using EXCEPTIONALISM in creative and communication strategies as per Global Brand Communication strategy and the Global creative expression of seeing South Africa through the eyes of a child “South Africa Awaits – Come Find Your Joy”.

Strategic rationale:

1. North Europe will align all exceptionalism 2024/25 work to Global Creative “South Africa Awaits – Come Find Your Joy”. Brand consistency is key in building brand recognition and loyalty in North Europe and by sticking to the same creative and communication strategies, we ensure that our brand maintains a consistent image and message across all media and distribution channels. This consistency reinforces brand trust and reliability among our audience, leading to increased brand engagement and conversion.

North Europe 2025/26 - Strategic Implication of EXCEPTIONALISM

- We are inviting North Europe travellers to “Come Find Your Joy - South Africa awaits” by experiencing a life-changing transformation, filled with rich, authentic, unfiltered experiences - from breath-taking beauty to sun-soaked coasts; from wildlife to active adventure; from vibrant urban energy to the incredible warmth and cultural diversity of our people.
- North Europe travellers primarily visit South Africa for leisure purposes, with popular experiences including beautiful scenery, safaris, cultural experiences, food & wine and our climate.
- In order for one to truly FIND JOY (i.e. experience life-changing transformation through travel), one needs to experience the “SA exceptional” - and South Africa offers this in abundance! We are the ultimate destination for the meaningful and transformative travel experiences that our Explorer audience (and sub-segments) crave.
- We need to identify interesting and exceptional stories (spanning people/ culture and locales), and build exceptional comms/content that ‘heroes’ these - both paid and/or user-generated to get explorers to see South Africa as the place to re-awaken their spirit by telling them our groundbreaking stories, and showing them the sensory experiences they miss.”

North Europe 2025/26 - Strategic Implication of EXCEPTIONALISM

- Our groundbreaking stories and exceptional experiences are further reasons to believe when we make the promise (and issue the call to action) to “Come Find Your Joy - South Africa awaits” - i.e., one cannot have a transformative travel experience, one that truly revives the spirit and lets you live again, if the destination being visited (or the experiences being had) are anything short of exceptional.

- In essence, we need to drive and WIN with our Brand Strength Model:
 - Affordability > VFM, Safety & Security, Easy to get around and welcoming people
 - Stature > Welcoming people & FUN
 - Awareness > WOM, movies, TV shows are the most impactful sources of information

The WHAT

- Discover the Richness of South Africa - where every experience is exceptional
- We need to celebrates South Africa's unique allure, from her warm people, its breathtaking landscapes and wildlife to its rich cultural heritage and exhilarating activities. It promises travellers an exceptional journey filled with discovery, inspiration, and unforgettable moments
- The exceptional nature of our people is embodied in Ubuntu, our warm hospitality, and the ground- breaking nature of our talents
- South Africa is where you also go to experience natural beauty that wakes up your senses.
- It is where you reignite your humanity, be inspired to build connections in an exceptional country.

Consumer/Trade TAKE OUT

- The exceptional nature of our people is embodied into our Ubuntu, our warm hospitality, and the groundbreaking nature of our talents. South Africa is where you also go to experience natural beauty that wakes up your senses. It is where you reignite your humanity, to be inspired and transformed. South Africa is simply the best travel destination of choice for leisure and business.
- Real evidence of human exceptionalism and ground-breaking stories
- Only-in-South-Africa experiences that inspire and transform
- South Africa's unique and vibrant cultures and landscapes

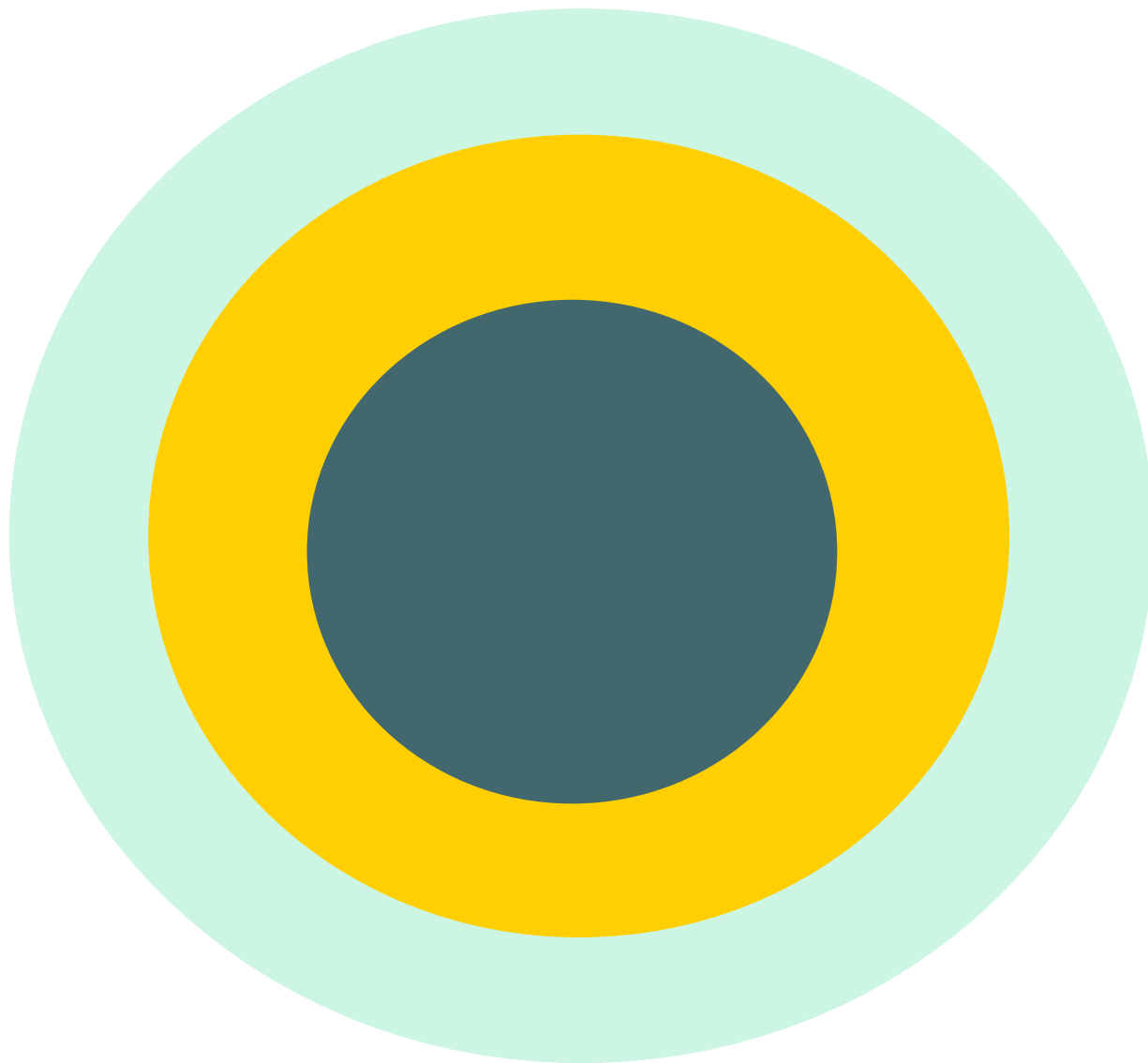
Come Find Your Joy - South Africa awaits

North Europe 2025/26 - Target Audie/Prime Prospects/Communication guidelines



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WHO DEFINITION



General Target Market:

All people who travel from that country. Outbound trips.



Strategic Target Market:

All people who travel for Long Haul in that country. Long Haul trips.



Prime Prospect:

The most responsive to your to your promise. The most likely to travel to SA. Low hanging fruit.



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Europe PRIME PROSPECTs - TRAVELLER MINDSET (Then nuanced by Europe hub)

- **WANDERLUSTERS**
- **SOCIAL EXPLORES**
- **SEASONED STATUS SEEKERS**
- **YOUNG FAMILY ADVENTURES**

- Well-travelled. Worldly.
- Independent
- Travellers, not tourists
- Travel is state of mind for them. They are global citizens for whom travel is an essential part of their everyday lives.
- They travel to expand their knowledge and to evolve (it keeps them interesting).
- They want to engage the destination, not see it at arm's length.
- They seek out interesting and high -quality experiences.
- They like to make their own decisions and maintain a sense of control over their destiny.

COG

NSSA

EXPERENTIAL TRAVELLERS

RETREATERS

WILDERNESS SEAKERS

TFT

JETSETTERS

WORLDLY TRAVELLERS

What does South Africa offer?



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What does South Africa offer?

BRAND FEATURES

A warm, welcoming people and diverse cultures
A rich, extensive and varied scenic, coastal and city landscape,
wildlife & safari in close proximity

FUNCTIONAL BENEFITS

An engagement with vibrant cultures, wide and open spaces, awe
inspiring natural beauty, realness and innovation

EMOTIONAL BENEFITS

A transformative connection with real people in an authentic and
immersive natural environment

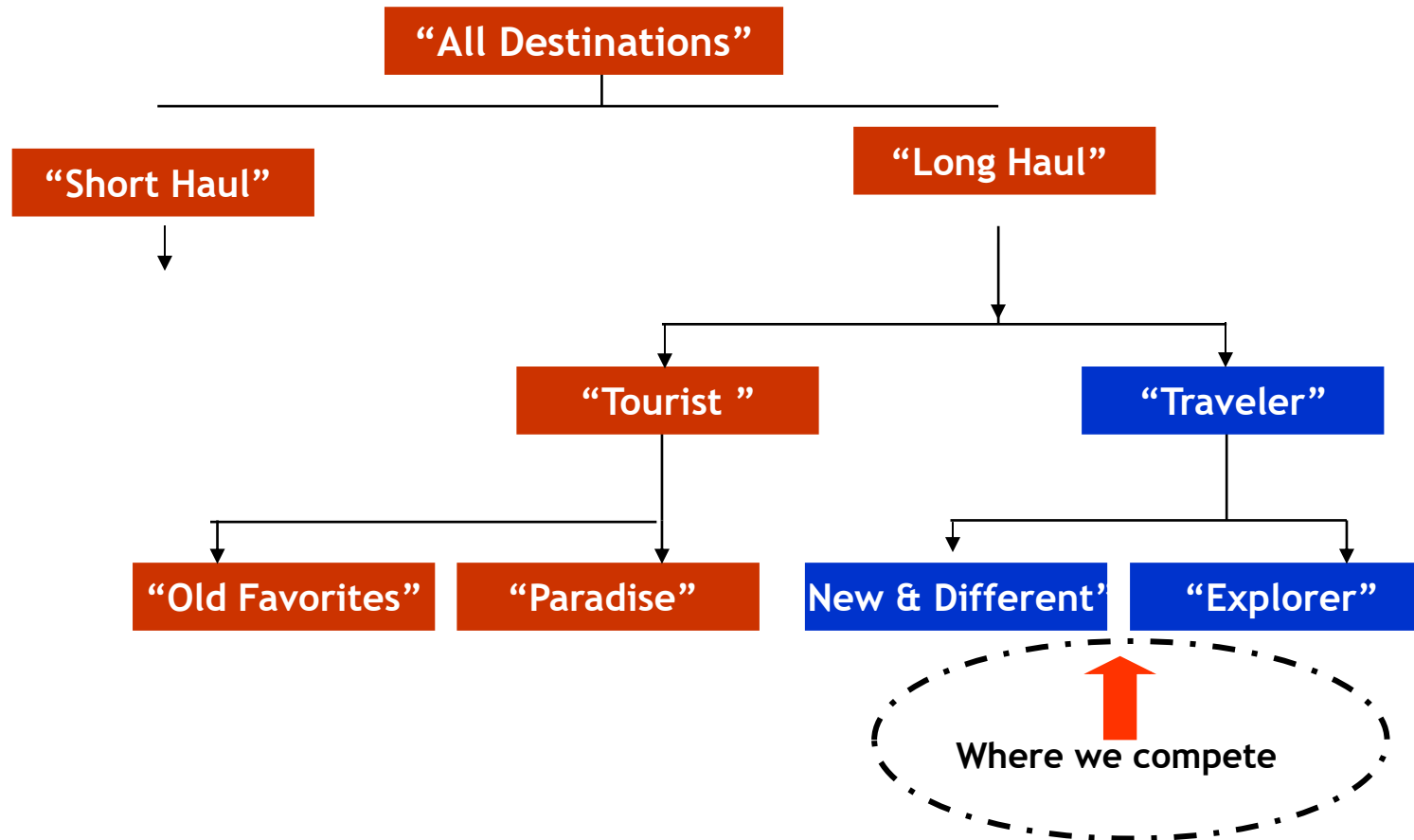
Where do we compete



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Where do we compete?

Two distinct groups of people who travel, “Tourists” and a “Traveller”. Tourists seek out the predictable and tour for predictable reasons, while travellers immerse themselves in the experience and regard each experience as a life enlightening one.



4 Drivers of Positivity and Consideration



Our Tonality

Our Tonality is informed by our brand personality and our brand values.

It is a consistent way of conveying our brand's message to our audience.

Our Tonality is a part of a brand expression that, together with visuals, defines our brand identity.

The way our brand **looks** is just as important as the way it **sounds**.

Words are an important part of our brand identity, and when used effectively, they can shape the way our brand is perceived.

Besides defining how our brand **looks** visually, it is also important to define how it **speaks**.

Our brand has a definitive style of writing and speaking, our tone of voice.

How we say it, also defines who we are as a brand!

Simply defined as the marketing mix we communicate to our prime prospects and the feelings it may provoke



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Our Tonality



Tone	FUN INVITING VIBRANT REAL INSPIRING				
Definition	moments of pleasure and enjoyment	offering the promise of an attractive or enjoyable experience	full of energy and enthusiasm	exceptionally genuine	an impassioned motivation



Considerations

- How could we hero our exceptional **people** and **cultures**, but from an **experiential** point of view and against the backdrop of exceptional **landscapes** (ticking off all points/areas simultaneously)?
- The opportunities are endless - we could look at developing a series of **content pieces** that work on their own and/or **seamlessly intertwine** these stories together within a single subject/theme (or even a specific person).

RECAP:

- WHAT WE DO AS SA TOURISM
- HOW WE LOCALIZE CAMPAIGNS
- WHAT OUR GLOBAL POSITIONING IS
- WHAT OUR COMMUNICATIONS STRATEGY IS



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NORTH EUROPE 2025/26



- SA Tourism develops the global tourism marketing campaign for the destination (**OFFICIAL DESTINATION MARKETING AGENCY FOR THE COUNTRY- REPRESENTS THE NATION BRAND**)
- This campaign is then localised in identified global markets including the North Europe Hub.
- Before the North Europe Hub campaign is rolled out, it must align to address global nuances and local insights
- This is referred to as a localised campaign.
- The localised marketing campaigns will have 360° integrated elements of the marketing mix, which is a comprehensive plan on reaching the target audience from multiple platforms and channels.

GLOBAL COMMUNICATION STRATEGY

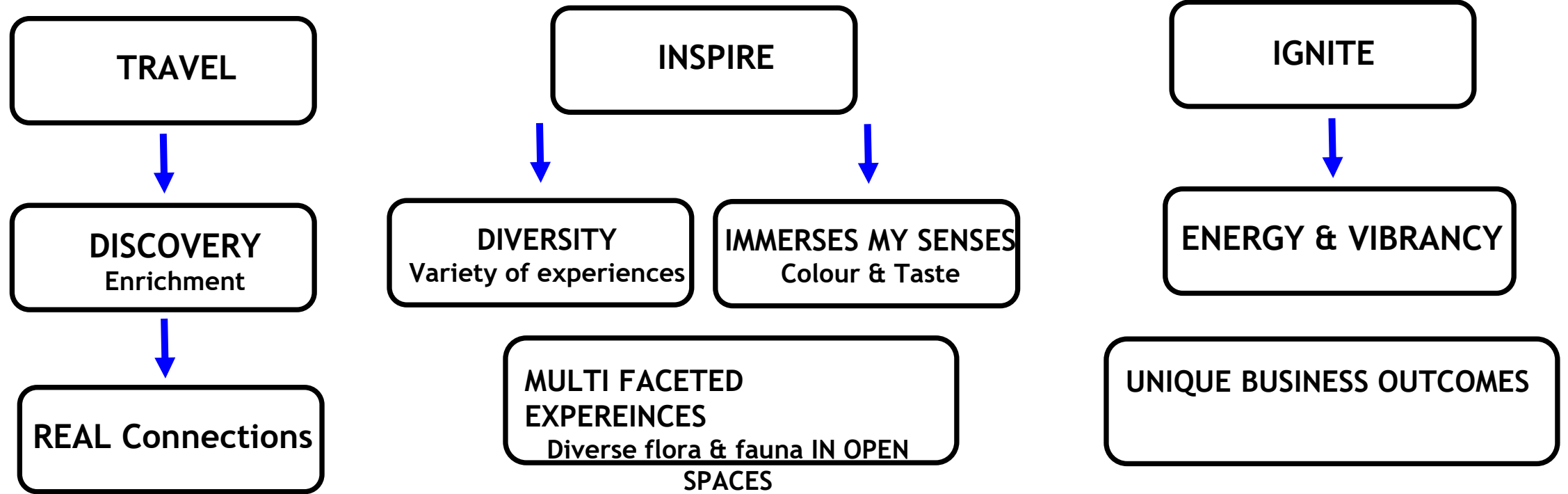


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**Discover REAL connections
that will inspire and ignite you**

#meetsouthafrica
#exploresouthafrica

Discover REAL connections that will inspire and ignite you



#meetsouthafrica
#exploresouthafrica

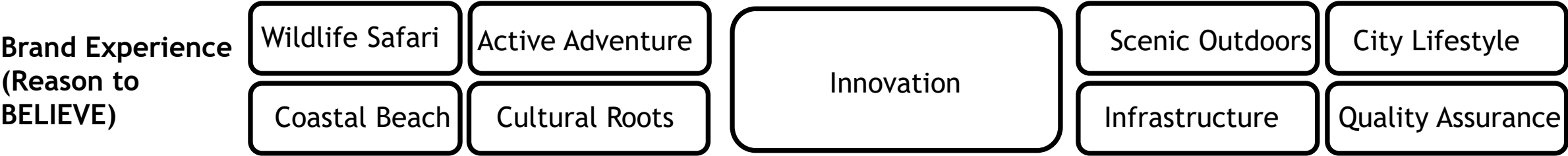
LINKAGE



ULTIMATECOUNTRYOFEXPLORATION

Where you will discover new things about yourself through the people and places of SA

Our experience pillars and the multiple and varied experiences and attractions that fall within them, in close proximity, are what make us a destination like no other. Experiencing any combination of our pillars is enrichment



We have many unique explorable experiences that are close and accessible. Demonstrating this variety, helps drive perceptions of VFM. Sharing the unique, charming persona of SA drives distinctiveness & familiarity.

Our PEOPLE UNLOCK hospitality and authenticity and are part of our USP. We must continue to show authentic, warm and friendly South Africans from all walks of life in our communications to improve perceptions of “welcoming” and allay S&S fears. Traveller word-of-mouth is our most valuable marketing tool.

Discover REAL connections that will inspire and ignite you

Then localised in-country based on Brand Journey, market insights and brand challenges to assist all teams in improving conversion ratios by developing global and regional breakthrough work



Our brand expression framework will help us execute consistently across all Business Units and markets

S_{small}

ULTIMATE
EXPLORATION

COUNTRY

OF

M_{edium}

South Africa provides the ultimate opportunity to immerse myself in unique and enriching experiences that are unlike any other anywhere in the world. South Africa is all about breaking new ground – it is the ultimate country of exploration.

L_{arge}

Immerses all my senses making me feel fully alive, Reconnects me with realness, Enriches me through a world of new experiences, embraces me into the SA family.

She impacts and expands all the senses in an awesome way. She lets you see as if for the first time again. You hear her beat in your heart and feel her fusion in your veins. Her humanity and the freedom that it brings touches you in places you never thought you had. Her wonder is so real that you can taste it. Even your sense of smell will never be the same again. South Africa liberates the senses to inspire new and different ways. We leave travellers with groundbreaking experiences and breath taking, enriching memories and so enable a transformation of quality of life...

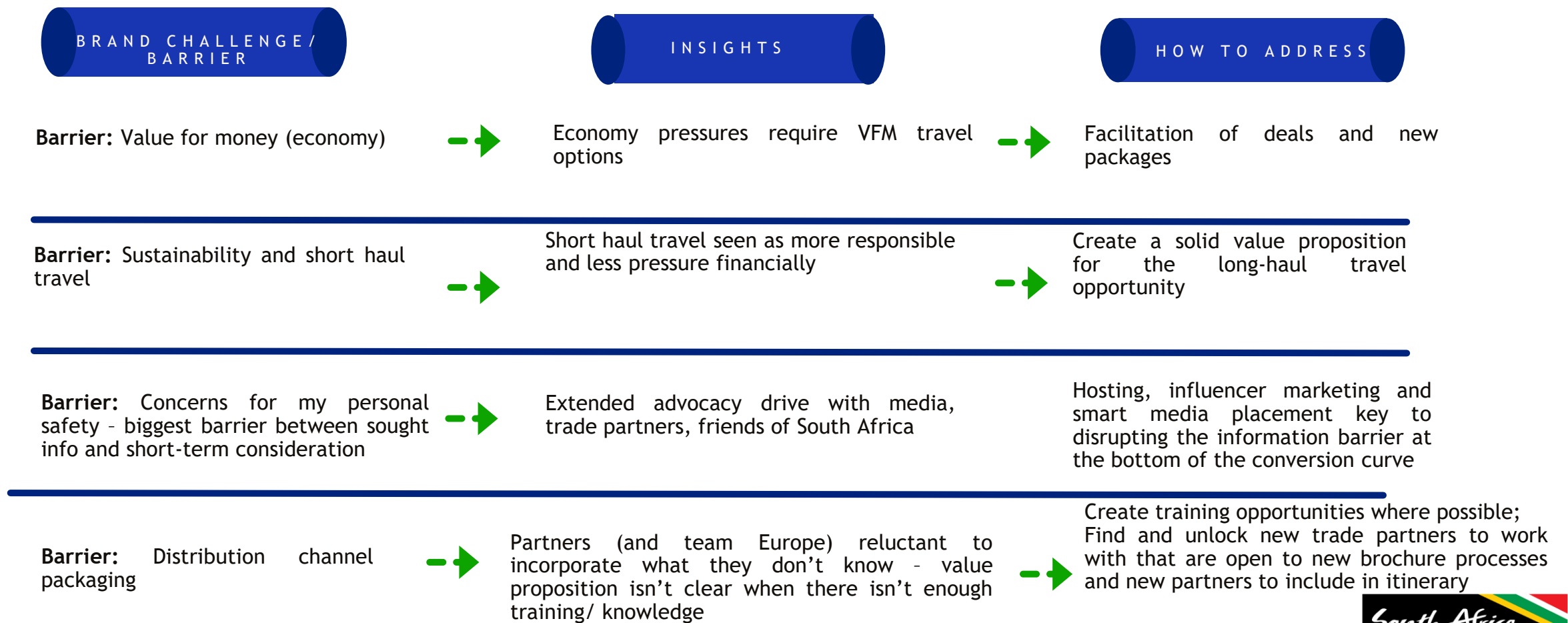
**LOCALISATION INFORMATION NORTH EUROPE
2025 - TO BE USED/ TAKEN INTO ACCOUNT
WHEN PROPOSING MEDIA STRATEGIES/ANY
CREATIVE EXECUTION**



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COME FIND YOUR JOY LOCALISATION PER HUB COUNTRY - NORTH EUROPE		
THE NETHERLANDS 65% of hub arrivals	BELGIUM 23% of hub arrivals	SWEDEN 12% of hub arrivals
BIG IDEA:		
CONNECTION AND RECONNECTION Joy is universal, but how we seek it is personal. “Come Find Your Joy” is an invitation to rediscover sense of freedom. It’s a heartfelt call to feel again—to reconnect with yourself, with those you love, and to let South Africa remind you what joy can be.		
CALL TO ACTION		
<ul style="list-style-type: none"> KOM JE GELUK ONTDEKKEN - encouraging Dutch audiences to seek their personal joy by immersing themselves in South Africa’s landscapes, food, adventure and vibrant culture. 	SOUTH AFRICA AWAITS - COME FIND YOUR JOY - amplification of food experiences, adventure and urban culture	SOUTH AFRICA AWAITS - COME FIND YOUR JOY - amplification of luxury, sustainability, scenic beauty and nature and safari
INSIGHT INFORMING BIG IDEA:		
<ul style="list-style-type: none"> Dutch travellers travel to awaken and discover who they are through travel They travel alone, with a spouse, young families and generational travel 49% repeater rate means opportunity to create advocacy They seek value for money, immersion with locals, active travel (more than adventure), scenic beauty, safari, off the beaten track experiences They value sustainable travel options, but not at a price premium 	<ul style="list-style-type: none"> Adventure, culture and safari are reasons for travel to SA Belgian consumers seek food experiences Less mature traveller than Dutch - impacts price points and familiarity Sustainability is an important consideration but not a deal breaker 	<ul style="list-style-type: none"> Sustainability a key consideration for decision making about their consumption choices including travel Enjoy nature and outdoors Enjoy water-based experiences and beach holidays Seek travel that allows them to immerse themselves in local culture Very mature traveller - not mature traveller to SA Consumer has a strong sense of social justice driven by Gen Z cohort Willing to pay for quality - defines their version of value for money
BRAND EQUITY DRIVER		
<ul style="list-style-type: none"> Amplification of connection - with South Africa, with South African people, and reconnection - with loved ones, with self and with nature and things the traveller cares about will allow a lasting association with the joy that connection and reconnection brings 		

PROBLEM STATEMENT/BUSINESS CHALLENGE



North Europe BIG Things - 2024/25

BIG THINGS	WHO, WHAT AND HOW
<p>1. Trigger considerers through the introduction of consumer relevant product that showcases immersive, adventurous experiences that amplify safari, scenic beauty and gastronomy while highlighting price points that will appeal to them</p>	<p>WHO: Considerers - first time travellers</p> <p>WHAT: showcases immersive, adventurous experiences that amplify safari, scenic beauty and gastronomy</p> <p>HOW: Showcasing/Consumer communication/Price points</p>
<p>2. Identify new segments of the NE distribution channel that align with the growth opportunity in driving SA conversion with dynamic, VFM packaging of deals that talk to what consumers want to experience such as variety, enriching experiences encompassing scenic beauty, wildlife, gastronomy and opportunities to immerse with locals and our culture while amplifying responsible tourism as a central value.</p>	<p>WHO: Trade value chain</p> <p>WHAT: value for money, variety and enriching experiences encompassing scenic beauty, wildlife, gastronomy and opportunities to immerse with locals</p> <p>HOW: Trade Communication; collaboration with trade</p>
<p>3. Facilitate inclusion and access for South African SMEs* by unlocking in-country value chain barriers caused by market maturity with offering relevant experiences and tourism services aligned with market and trade insights</p>	<p>WHO: SA DMCs; in country TOs (value chain); trade landscape; emerging tourism enterprises (ETEs)</p> <p>WHAT: removal of accessibility barriers</p> <p>HOW: facilitating the inclusion of ETEs/SMEs + offerings aligned to market and trade insights</p>

COME FIND YOUR JOY EXECUTION - 360° ELEMENTS INFORMING PROJECTS

MEDIA

Media buy periods for inspiration and conversion
Inspiring audiences with content that inspires and excites

TRADE AND CONSUMER EVENTS/ACTIVATIONS

Engagement with trade and consumer audiences for market prioritization
Facilitation of market access to ensure market has product/partners that align to consumer needs
Amplification of corporate presence and value

BIG IDEA:

Joy is universal, but how we seek it is personal. “Come Find Your Joy” is an invitation to rediscover sense of freedom. It’s a heartfelt call to feel again—to reconnect with yourself, with those you love, and to let South Africa remind you what joy can be.”

CALL TO ACTION:

KOM JE GELUK ONTDEKKEN IN ZUID-AFRIKA
SOUTH AFRICA AWAITS - COME FIND YOUR JOY (Sweden and Belgium)

PUBLIC RELATIONS

Stories that highlight different brand pillars, experiences and people
On-boarding of consumer and trade partners to ensure “friends of South Africa” and alignment with our brand promise

TRADE

Collaboration efforts with trade and airline partners to ensure conversion in the right channels, destination training opportunities and alignment of new itineraries and packaging opportunities

INSIGHTS FOR MEDIA PLAN



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OUR AUDIENCE - WANDERLUSTER EXPLORERS

WHO

*Explorers in NORTH EUROPE (Netherlands, Belgium and Sweden) who have a renewed awareness for responsible tourism priorities and have a need for transformative experiences and moments



singles/couples



average age



digital WOM
travel guides



70% book
independently

AGED 25-45

AUDIENCE SIZES

3.230.000 

1.870.000 

2.140.000 

42% of consumers in target audience are
"wannabe responsible travellers"

OUR AUDIENCE - NSSA EXPLORERS

*Explorers in NORTH EUROPE (Netherlands, Belgium and Sweden) who prioritise family and generational travel, have extra disposable income, take x2 long haul trips a year, enjoy off the beaten track destinations and have a need for transformative experiences and moments

WHO



Family travellers, empty nesters, well-travelled, "next stop South Africa" travellers



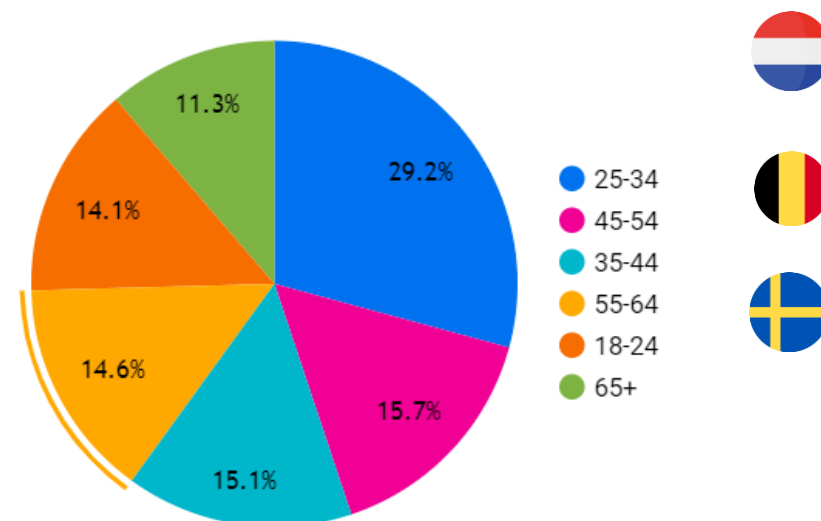
digital WOM travel guides



Make up 45.2% of website visitors, 60% book through travel specialists/ travel advisors

AGED 46-60 +

AUDIENCE SIZES



BRAND TRACKER AND CONSUMER INSIGHTS



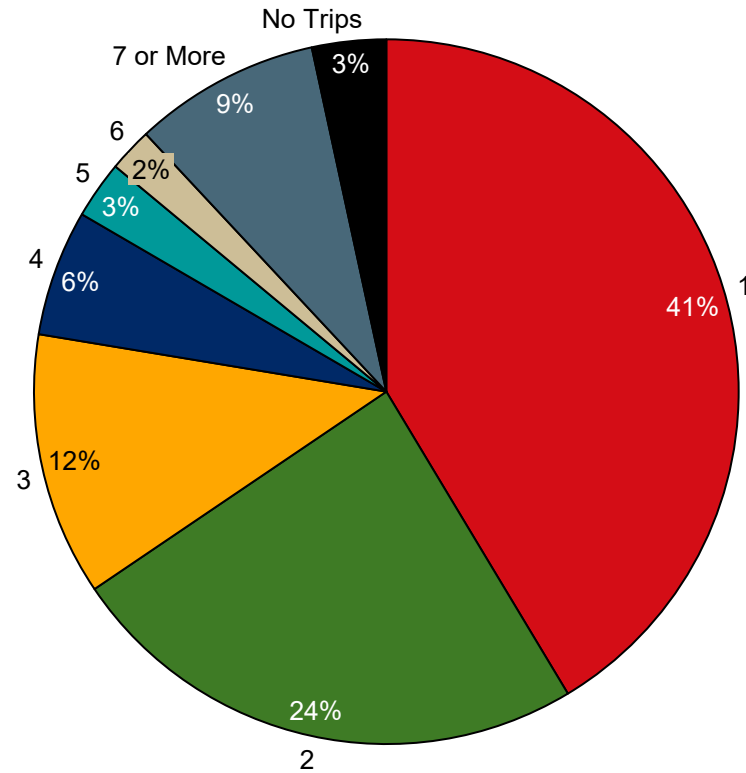
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· GENERAL TRAVEL BEHAVIOUR



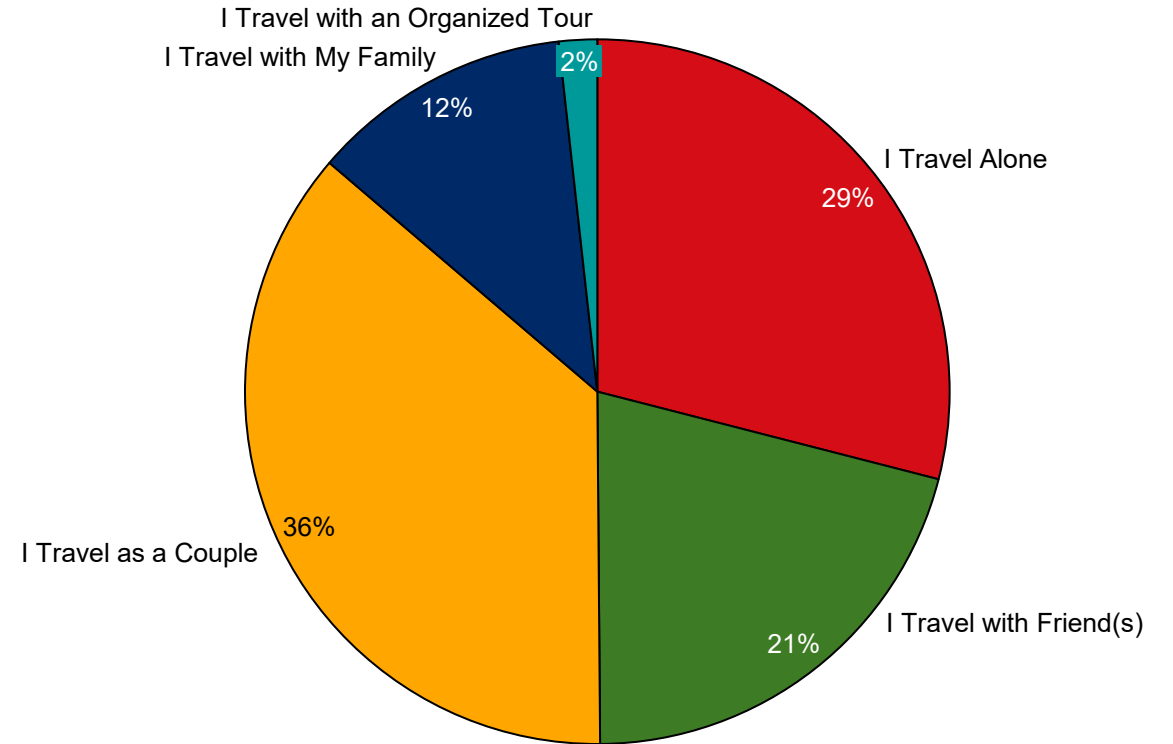
Travel Habits | Number of Trips and Individuals

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



Average: 2.8 Trips

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

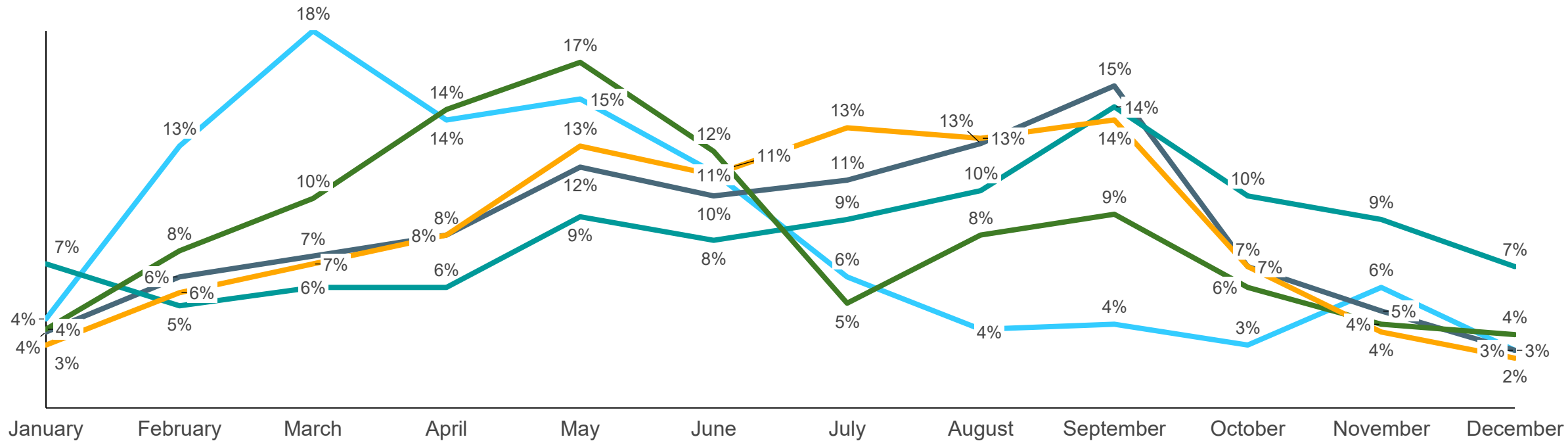


- Based on all respondents: (n=800)
- Number of Trips (Q45a): On average, how many international trips for leisure purposes do you take every year requiring a plane ride of 5 or more hours?
- Number of Individuals (Q45b): When you travel internationally for leisure, who do you usually travel with?

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)

Jun-23 Oct-23 Feb-24 Jun-24 Oct-24

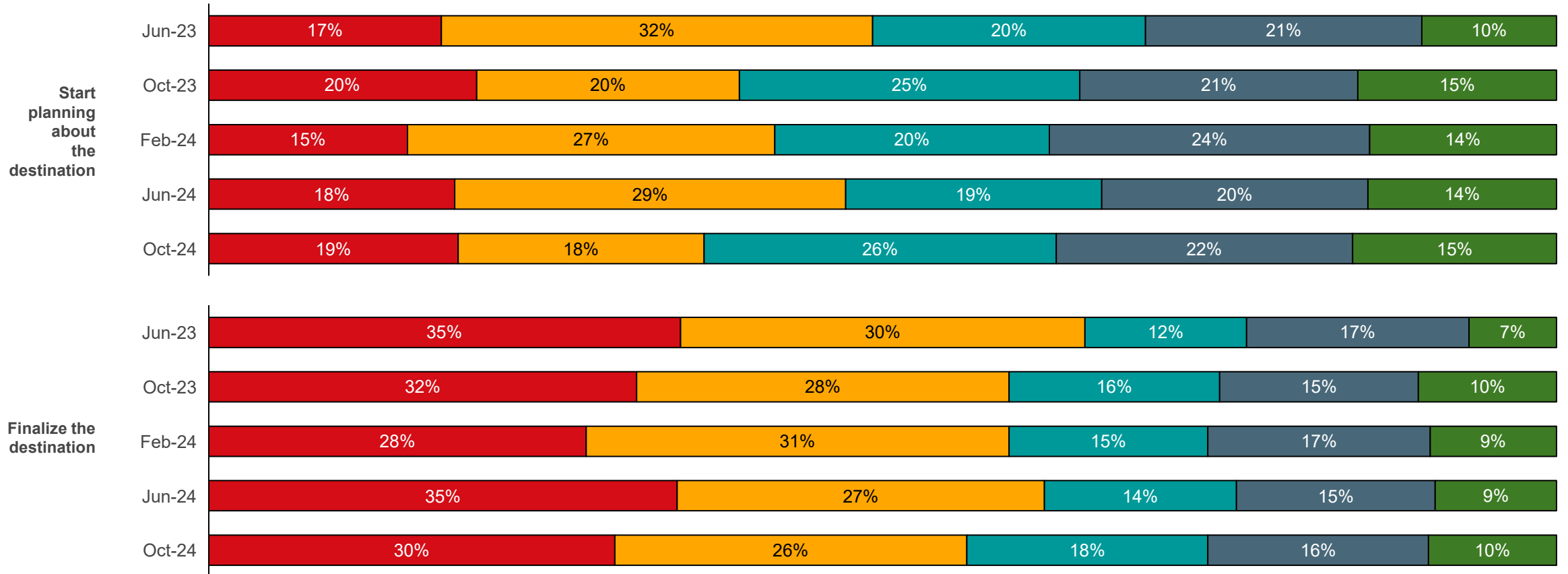


- Based on respondents who travelled for leisure purposes in the last 5 years: Jun-23: (n=400); Oct-23: (n=800); Feb-24: (n=800); Jun-24: (n=400); Oct-24: (n=800)
- Month of travel (Q12a_2): Please select the month of travel for your most recent international trip for leisure purposes? (Choose one)

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)

■ Less than a month before the trip
 ■ 1 to 2 months before the trip
 ■ 2 to 3 months before the trip
 ■ 3 to 6 months before the trip
 ■ More than 6 months before the trip



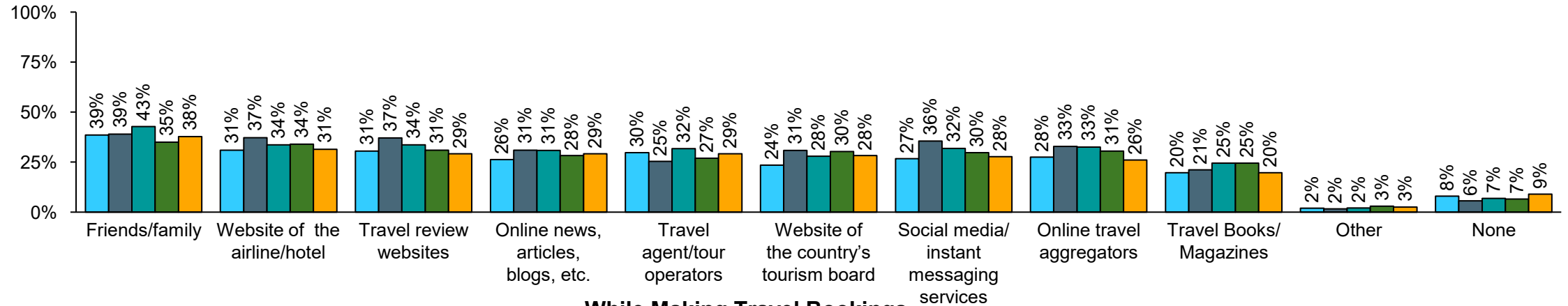
- Based on respondents who travelled for leisure purposes in the last 5 years:
- **Planning the Trip** (Q12a_3): Thinking back to the time when you were planning for this trip, how many months before the trip did you start thinking about the destination for the trip? (Choose one)
- **Finalizing the Trip** (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)

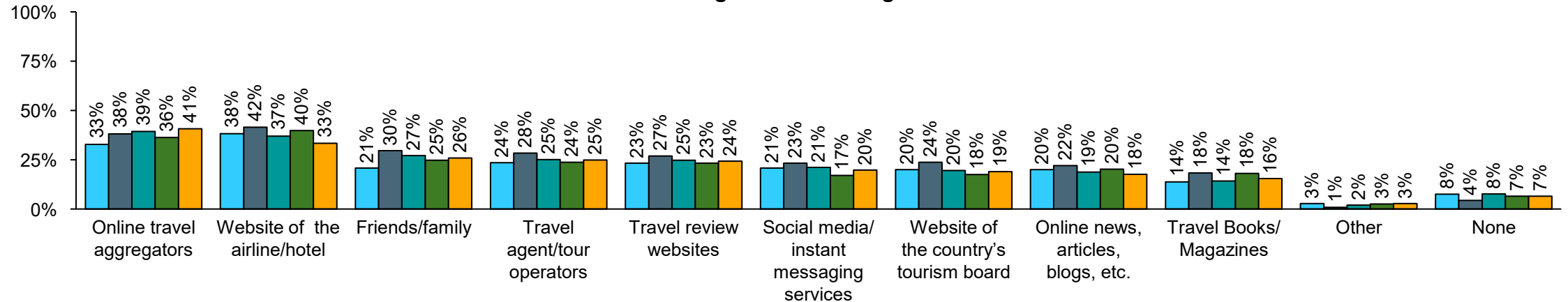
- **Role of Media Channels at Different Stages of International Leisure Trip**
(based on all respondents)

Jun-23 Oct-23 Feb-24 Jun-24 Oct-24

While Selecting The Destination



While Making Travel Bookings



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



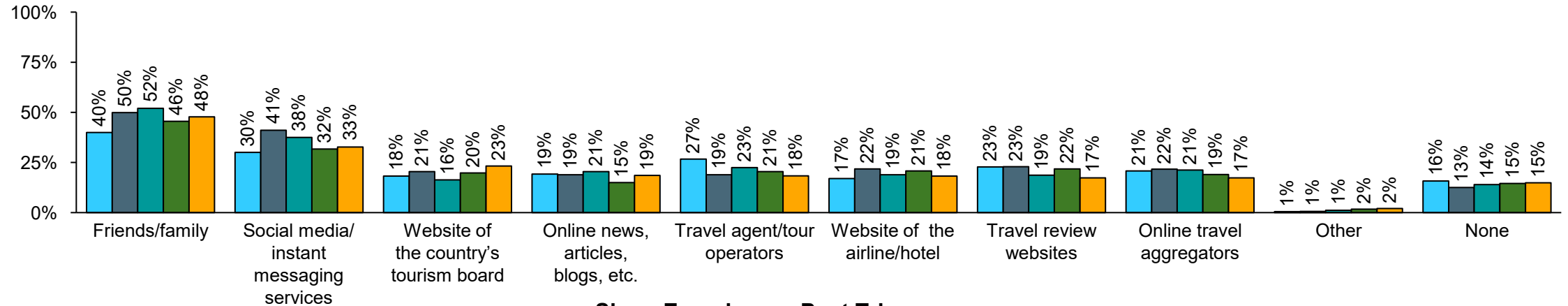
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Role of Media Channels (2/2)

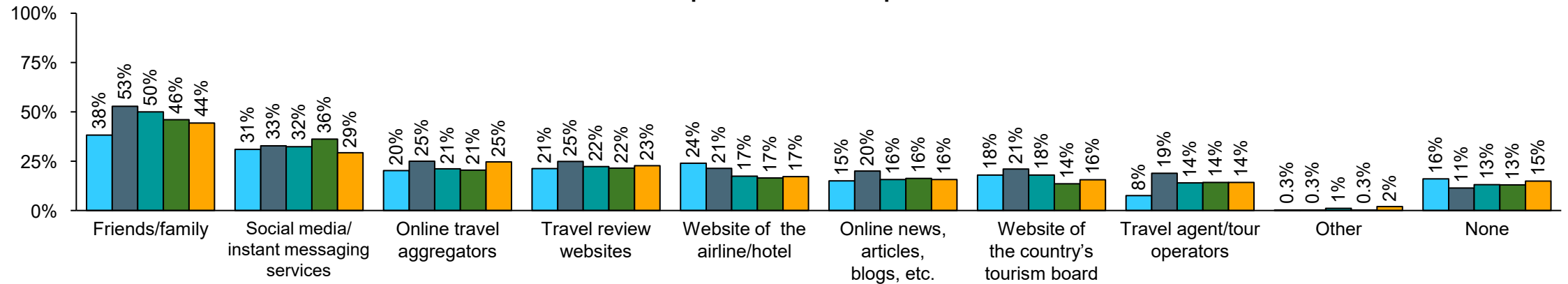
- **Role of Media Channels at Different Stages of International Leisure Trip**
(based on all respondents)

Jun-23 Oct-23 Feb-24 Jun-24 Oct-24

Share Experiences During The Trip



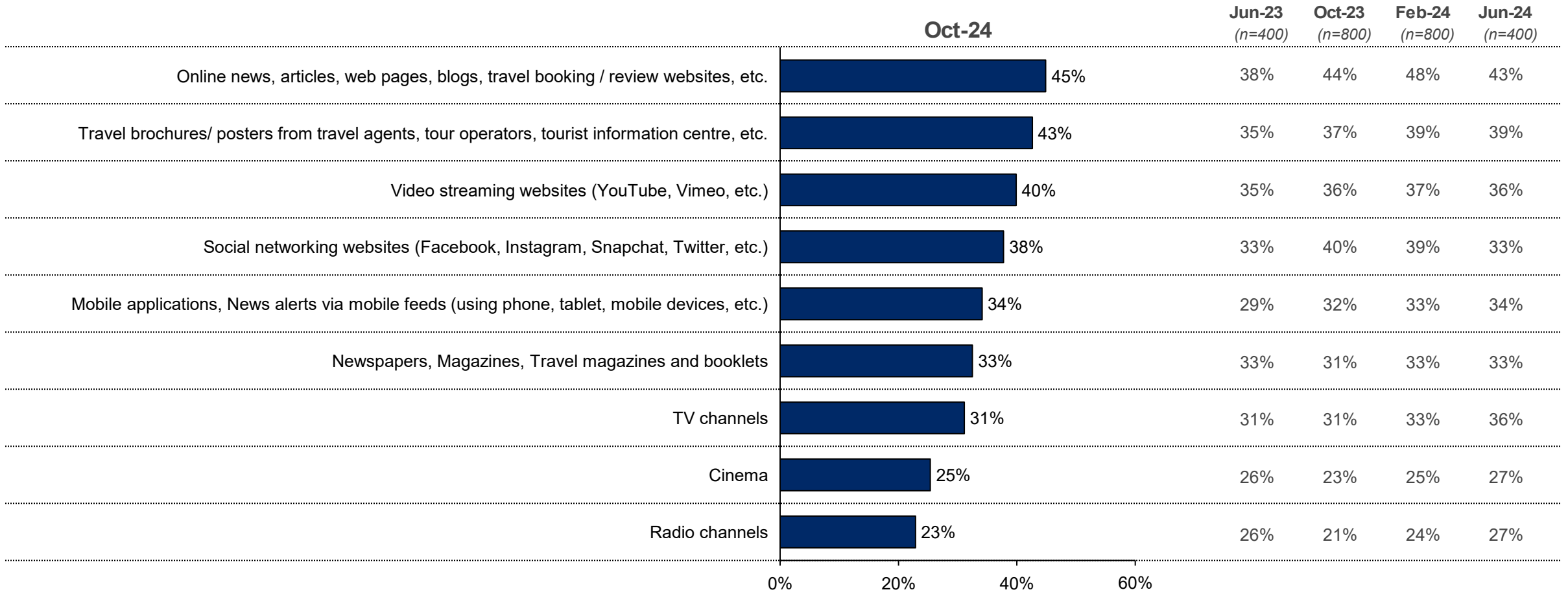
Share Experiences Post Trip



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

- **Preferred Media Channel**
(based on all respondents)



- Based on all respondents (n=1000)
- 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)	Jun-23 (n=400)	Oct-23 (n=800)	Feb-24 (n=800)	Jun-24 (n=400)	Oct-24 (n=800)
Travel Attitudes: Aspirations					
Some of my most important life goals involve travel experiences I want to have	27%	37%	38%	34%	34%
I expect to travel internationally more in the future than I do now	26%	27%	28%	24%	29%
Travel Attitudes: Adoption					
I find change exciting	28%	27%	29%	26%	26%
Once I find something I like I tend to stick with it	20%	22%	21%	20%	25%
I am one of the first people I know to try something new	20%	23%	21%	17%	23%
Travel Attitudes: Barriers					
Traveling internationally is a luxury	29%	37%	41%	41%	42%
The threat of global terrorism affects where I consider traveling internationally	20%	25%	31%	25%	29%
I would spend more money to travel to a destination that I know is safe	25%	28%	29%	24%	27%
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	17%	14%	20%	19%	24%
I would prefer visiting a country that is promoting eco-friendly policies	20%	21%	18%	17%	22%
I worry about how I may be treated in foreign countries due to my country's policies	14%	18%	19%	17%	17%
Travel Attitudes: Economics					
I am now more likely to save money than to use it to travel internationally	20%	18%	23%	19%	22%
I invest more of my extra money in my home than I used to	19%	20%	23%	22%	21%
I am spending less money on travel in favor of other forms of entertainment (eating out, movies, amusement parks, etc.)	13%	12%	18%	17%	18%
Travel Attitudes: Time & Distance					
I dont mind increasing my travel time for a cheaper airfare	21%	21%	28%	19%	25%
I am taking shorter, more frequent trips than I used to	20%	17%	22%	20%	23%
I am traveling closer to home than I used to	16%	15%	18%	19%	19%
Travel Attitudes: Travel Behavior					
I purchase travel packages that include airfare and hotel as one price for my short distance trips	23%	19%	22%	22%	25%
I prefer group tours for my long distance international trips	16%	17%	20%	15%	20%

- **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

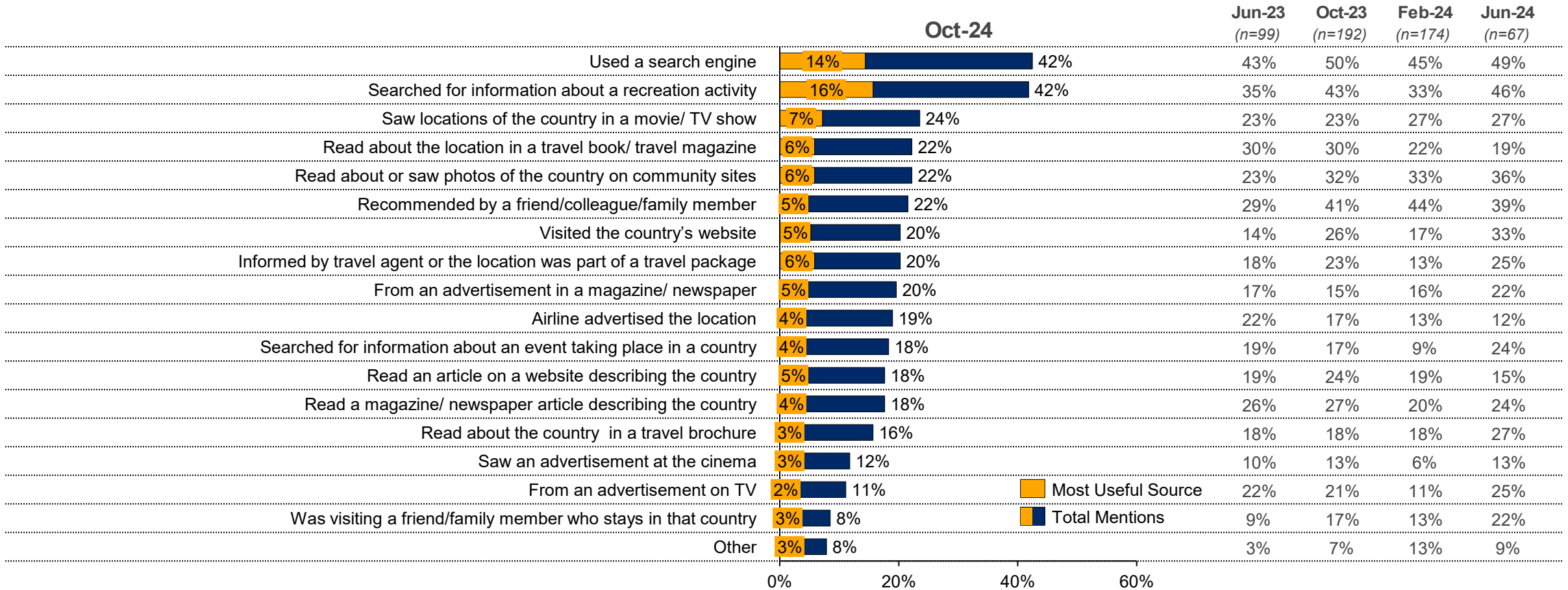


Information Sources | South Africa



• Sources of Travel Information

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



Based on responses from 760

of all respondents who have sought leisure travel information on South Africa in the past 18 months

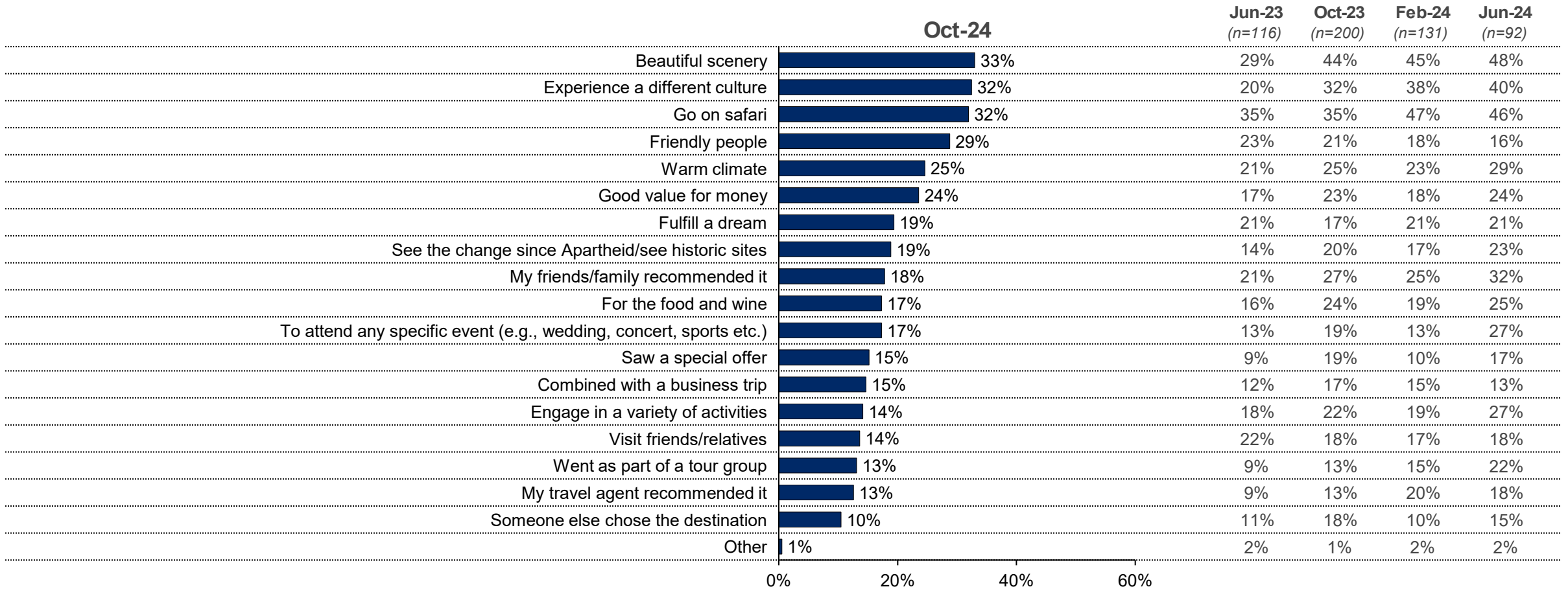
of all respondents)

- 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)

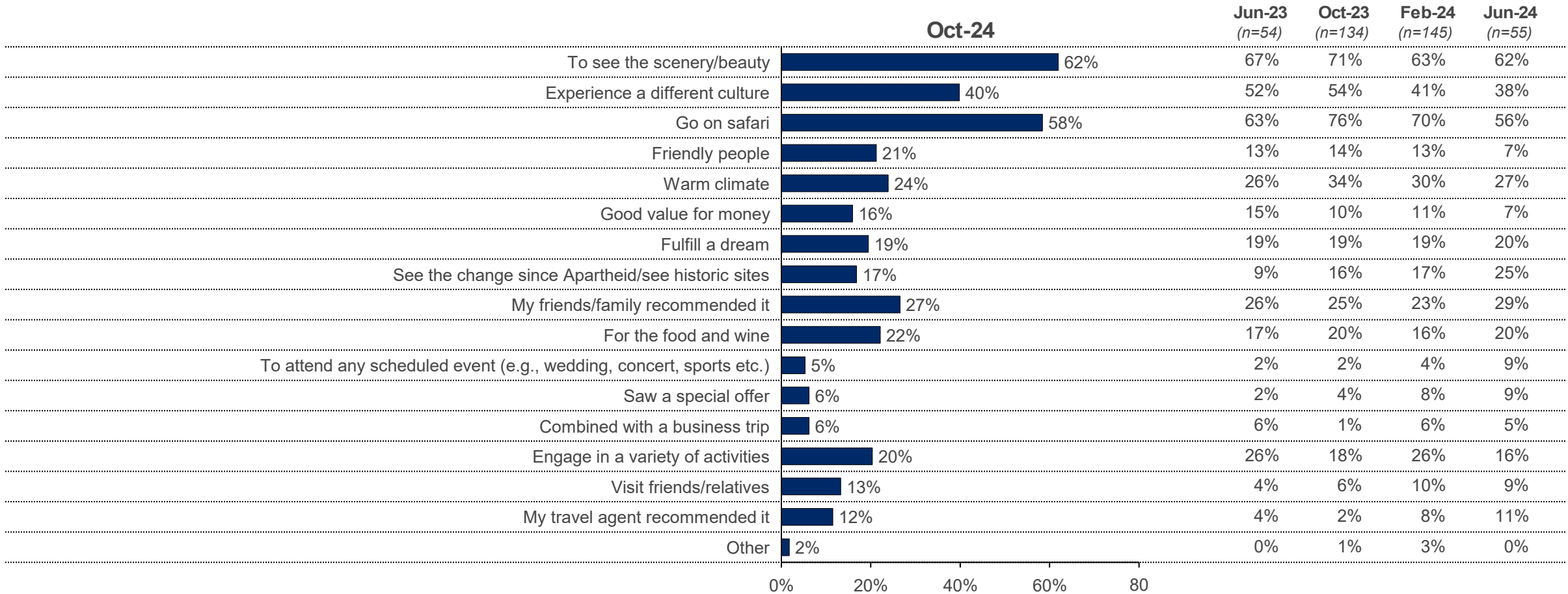


- Based on those who have visited South Africa for leisure in the past 5 years (24% of all respondents)
- Reasons for Visiting South Africa (Q35a): Why did you choose to visit South Africa as a destination for leisure purposes? (Select all that apply)

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

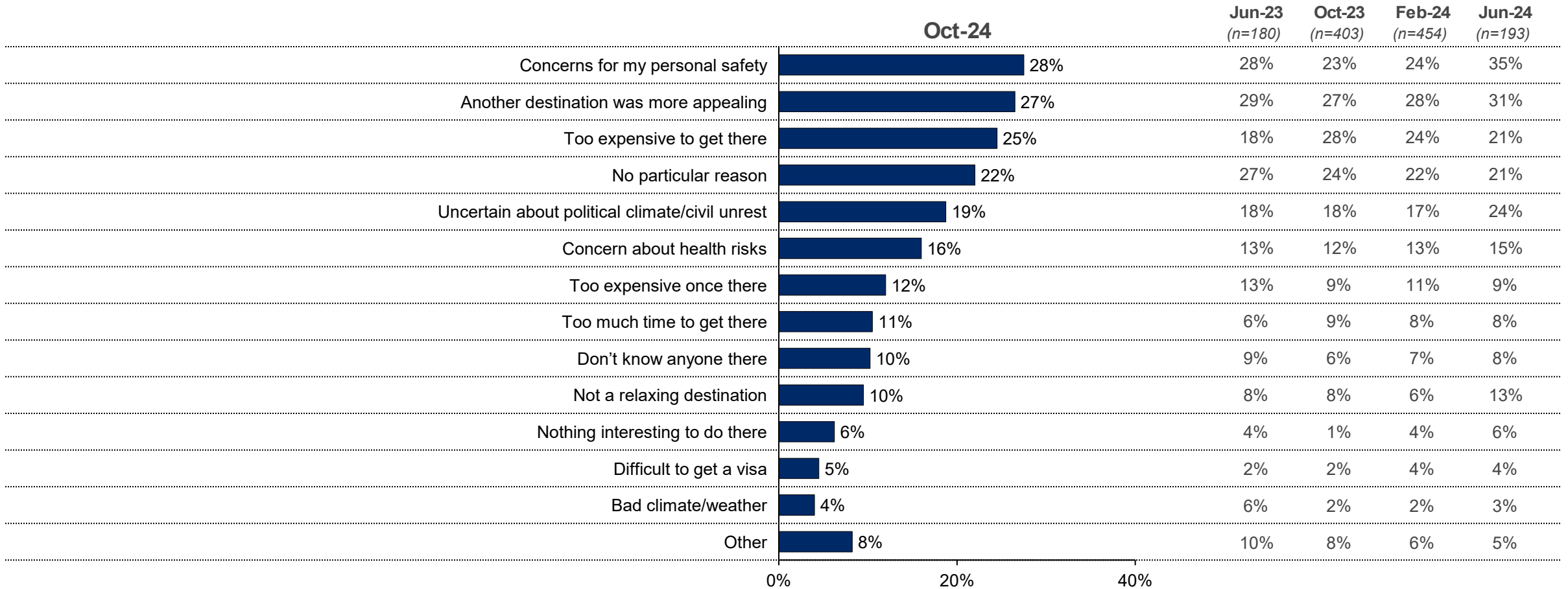
- Based on those who have not visited South Africa in the past 5 years, but intend to in the future for leisure (14% of all respondents)
- Interest in South Africa (Q42): Why are you interested in visiting South Africa for leisure purposes in the future? (Select all that apply)
- Note: The sequence of the attributes is consistent with the reasons for visiting (previous slide), to allow better comparison across attributes



SOUTH AFRICAN TOURISM

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)

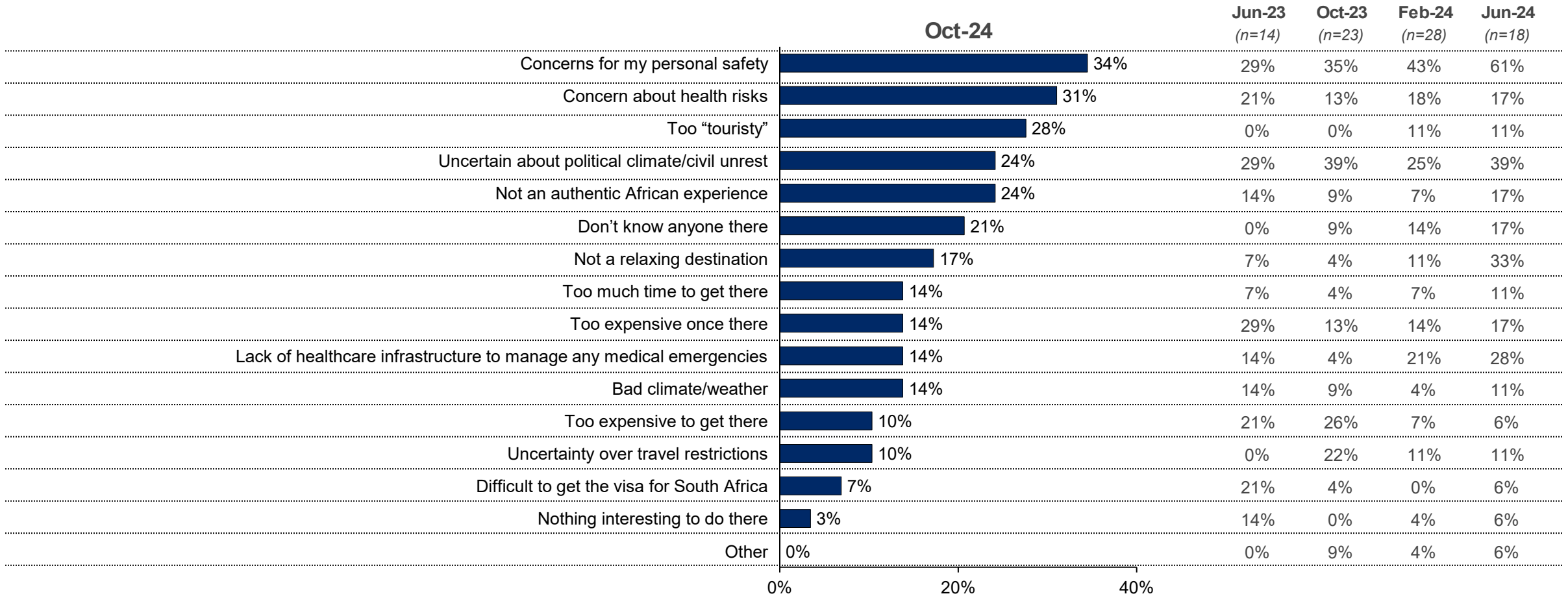


- Based on those who have not visited South Africa in the past 5 years for either business or pleasure; 50% of all respondents)
- **Reasons for Not Visiting South Africa (Q34):** Why haven't you visited South Africa for leisure purposes in the past 5 years? (Select all that apply)

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** 4% 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)



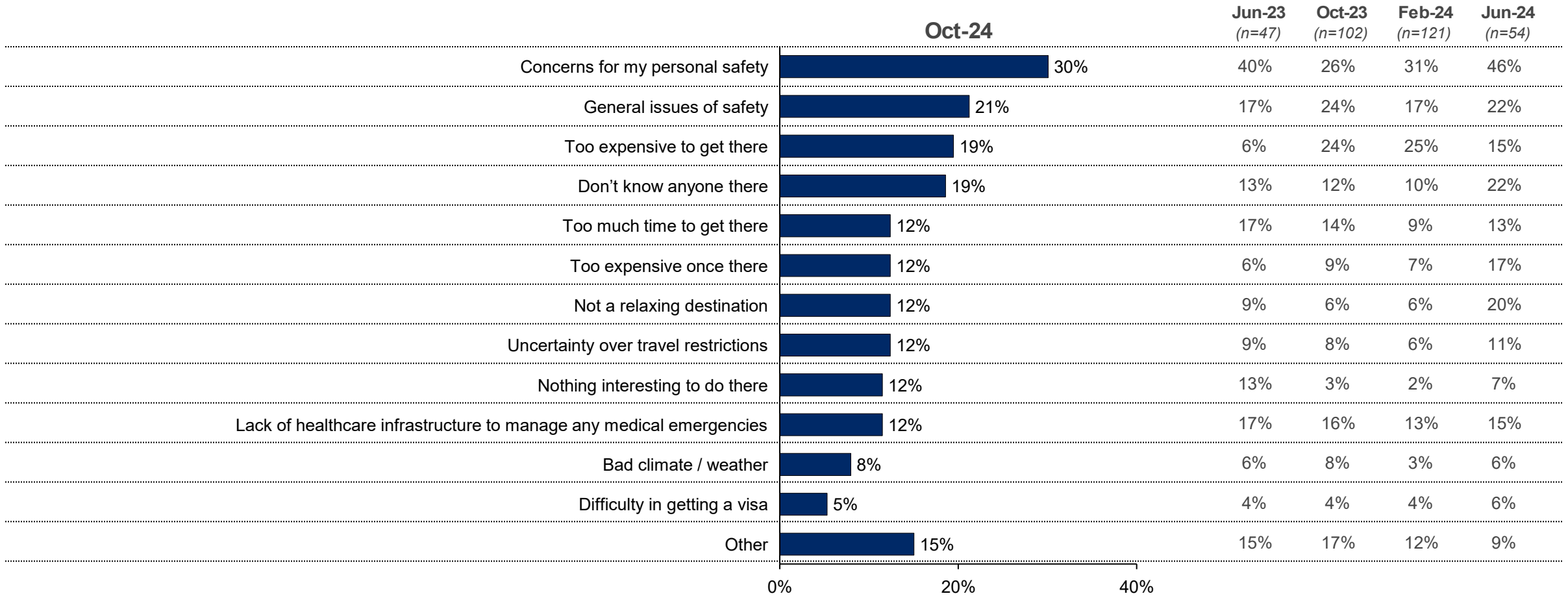
SOUTH AFRICAN TOURISM

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

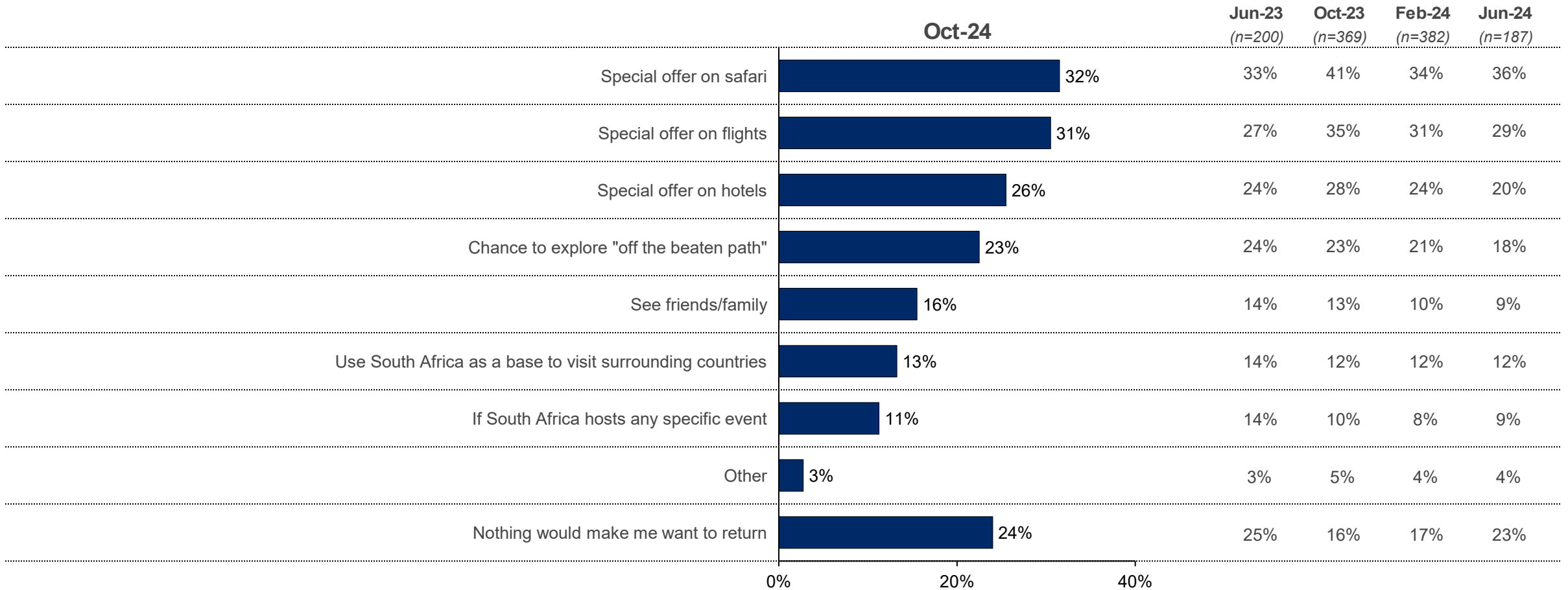
- Based on respondents who have visited South Africa for leisure in past 5 years or have sought info but have no intent to visit in the future (14% of all respondents)
- Reasons for Rejection (Q16e): After seeking information about this country, why are you no longer planning to visit this country for leisure travel? (Select all that apply)



SOUTH AFRICAN TOURISM

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 (50% 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