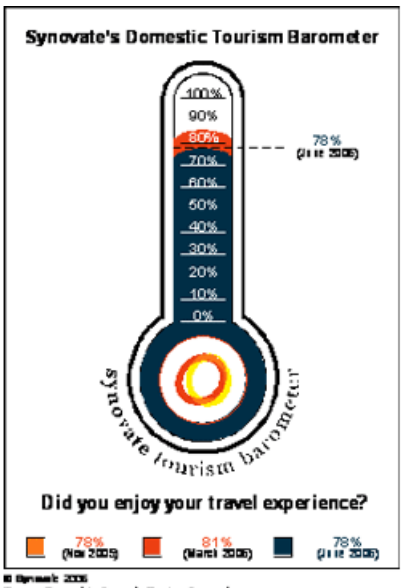
Domestic tourism cools over the winter months

Issued by Synovate

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As South Africa celebrated Tourism Month in September, Synovate released its third reading of Synovate's Domestic Tourism Barometer.

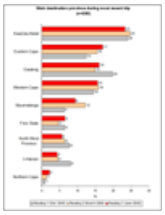


The average satisfaction level of domestic travellers has decreased slightly from 81% in March 2006 to 78% in June this year. This is according to the third reading of Synovate's South African Domestic Tourism Barometer, a unique study focusing on the more affluent domestic travellers in South Africa.

Ahead of Tourism Month in September, the Department of Environmental Affairs and Tourism's initiative to showcase the unique offerings of each of the nine provinces, a challenge to build up Domestic Tourism has been identified when comparing it to our International Tourism market. International Tourism outperformed all other sectors of South Africa's economy last year, indicating huge potential for the Domestic Tourism Market.

Over the winter months, weekend trips replaced full length holidays and there was an increase in the number of business trips taken. Business travellers are not as easy to please as holiday makers possibly due to the purpose of their travel. Only 11% of respondents reported taking trips that were longer than six nights long. The average length of the trips taken during this period was four nights.

The barometer index calculated by Synovate encompasses both the experiential and physical elements of tourism. The ratings of these attributes for the past three readings can be seen below:



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Looking at the experiential attributes, most of them have remained stable compared with the previous wave. Although most respondents felt that their trip met their expectations, there has been a decline in the excitement and memorability of their experience. The educational elements of the trip received the lowest ratings for the third consecutive wave. Since the emphasis for most travellers is on relaxation and being able to get away from it all, it is unlikely that they are actively going out to look for educational outings or experiences.

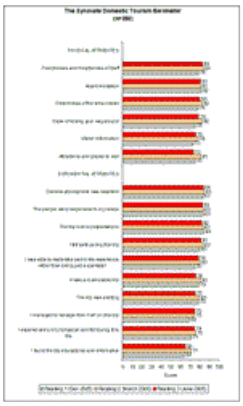
KZN (23%) still remains the most popular destination followed by Eastern Cape (17%) and Gauteng (16%). Almost two-thirds of the respondents who visited Gauteng did so for business purposes, compared to a third in the Eastern Cape, and 22% in KZN. It is thus no surprise that visitors to Gauteng were less able to "escape from it all". This important driver of loyalty was rated at a very low 55%. Travellers generally tend go to Gauteng for business, not for holiday. This sentiment is further reflected in the lower overall barometer reading for Gauteng (71%) as opposed to Eastern Cape (87%).

"Synovate's research into Domestic Tourism has demonstrated that business travellers tend towards lower ratings and are generally harder to please when travelling," states Jon Salters, Managing Director of Synovate sub-Saharan Africa. "We have identified being able to escape as one of the main drivers of loyalty. As such the tourism industry and, especially, the hospitality industry need to find ways to incorporate this element into business travellers' experience. This could be by, for example, providing spa facilities or themed restaurants within the hotels," suggests Salters.

The physical attributes which have shown a marginal decline in satisfaction over the winter months include visitor

information and attractions and places to visit.

Game lodges appeared to be more popular in the colder months. The second reading of the barometer in March 2006 indicated that only 6% of respondents had visited game lodges in the previous three months. This figure tripled in the third reading.



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The good news is that the loyalty attributes have remained relatively stable. The majority (83%) of respondents agree that they would go back and do a similar trip in the same area and 81% of respondents state that they would recommend this whole experience to a friend.

More about the Survey

The Synovate barometer measures factors affecting the travel experience overall, whether it be for a weekend getaway, holiday or business. The company interviewed 250 domestic travellers from the more affluent market across the nine provinces.

Fieldwork for Wave 3 was conducted from 8th May to the 21st June 2006.

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