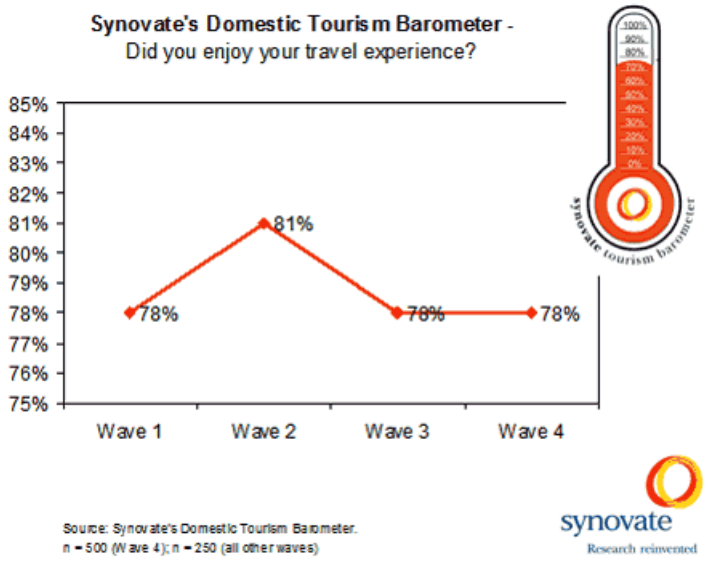
Domestic tourism continues to please

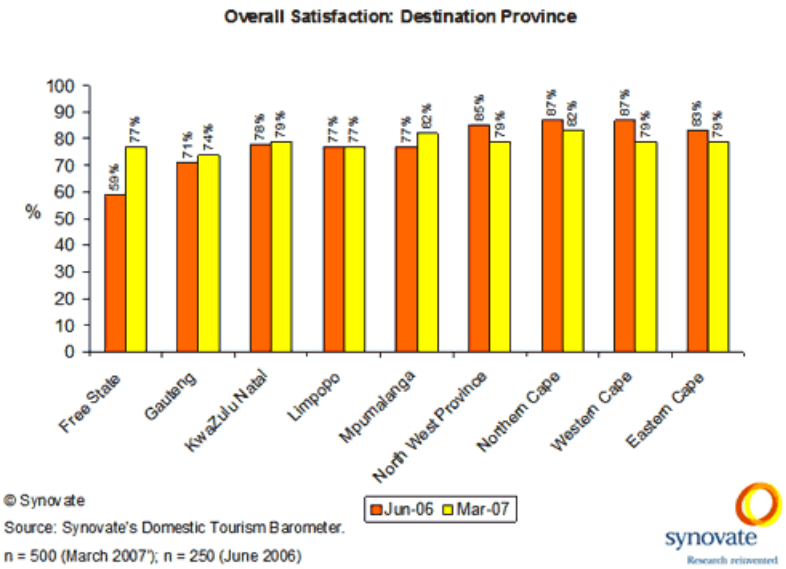
Issued by Ipsos

7 Mar 2007

Satisfaction with domestic tourism stabilised over the last six months of 2006, according to the latest results from Synovate's Domestic Tourism Barometer. Overall satisfaction when travelling within South Africa remains at 78%.



The most notable change amongst those travelling lies with the single respondents – whose satisfaction levels have dropped quite noticeably – from 83% in June last year to 75% reported this year.



"This is very definitely good news for the tourism industry in the years leading up to 2010," states Jon Salters, Managing Director of Synovate Sub Saharan Africa. "While everyone expects that satisfaction with tourist experiences should be increasing in the popular destinations such as Cape Town, KwaZulu Natal and Gauteng, it is encouraging to note that other provinces are also improving and creating a better experience for tourists."

5-star Performers

Domestic Tourism is strongest in the areas of *accommodation, ease of finding one's way around,* and the *friendliness and helpfulness of staff*. Respondents felt that the *general atmosphere* was excellent, the found that people were *responsive to their needs* and unanimously agreed that they would *recommend the experience to their friends*. Each of these aspects were rated over 80%.

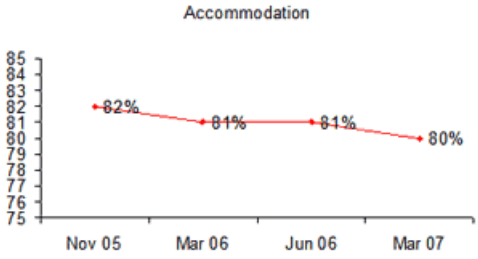
Just over three quarters of respondents visiting Gauteng agreed that they would *recommend* their experience to their friends. Mpumalanga, North West Province, Western Cape, Eastern Cape and KwaZulu Natal enjoy the highest levels of word-of-mouth advertising.

Areas for Improvement

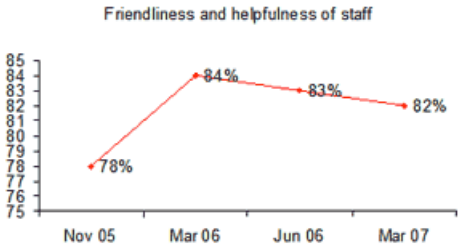
Two identified areas for improvement are *visitor information* as well as the need to *feel safe* on the trip.

Free State and Gauteng score lowest for *visitor information* – 61% and 68% respectively. The Northern Cape appears to be getting it right and scored highest amongst all provinces – 85%

Physical Attributes







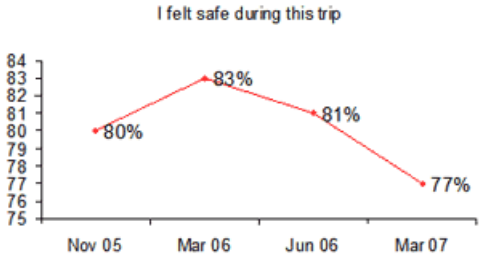
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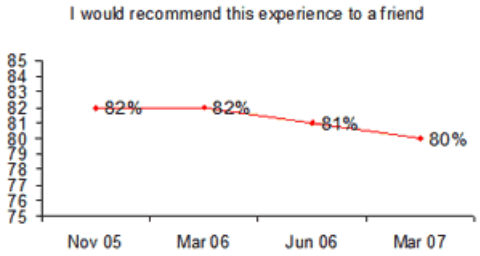
Synovate's Domestic Tourism Barometer

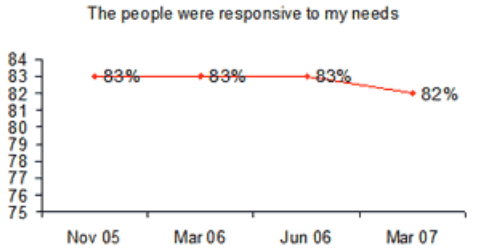
n = 500 (March 2007)

n = 250 (All other waves)

Experiential Attributes









© Synovate

Synovate's Domestic Tourism Barometer

n = 500 (March 2007)

n = 250 (All other waves)

Overall, 77% of respondents stated that they felt safe on their last trip – a decline from 81% in June last year.

"This should be a major focus point for those in the industry," states Salters. "With crime levels under close scrutiny in the press at the moment, making your visitors feel safe and secure is a sure-fire way to enhance their experience and up satisfaction levels with domestic tourism." Most of the provinces, however, reflect a decline in this area.

Domestic Business Tourism

Satisfaction levels of Business travellers in South Africa are slightly lower than the national overall average – 73% indicate they are satisfied as against 79% of all travellers (including holiday and weekend away travellers).

46% of business travellers stayed in hotels; 88% say they would stay there again and the majority (51%) stayed for 1-2 nights. 23% stayed with friends and family; 11% stayed in self-catering accommodation and 8% stayed in a game lodge. Eight out of ten business travellers rate the accommodation they stayed in and friendliness of staff extremely well.

73% of business tourists state that they felt safe during their most recent trip vs. the national cumulative overall average (including holiday travellers) of 80.4%

Business travellers spend more per day than leisure travellers - the overall average daily spend recorded over all waves for business travellers is R1 202.20 – compared to the overall average daily spend of holiday travellers at R991.00.

Holiday Trends

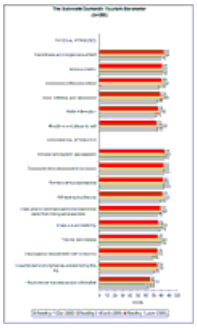
Younger, more technology-smart, age groups (16 – 24 year olds) show a marked increase in booking their trips over the Internet (40% in March 2007 compared to 18% cumulative average). Travel agent usage sees a slight decrease overall and sits at 18%. Overall, respondents prefer to use the telephone to book their trips with 47% using this method.

The average length of trip increased in the last wave of 2006. The June results reflected an average of 3.9 nights, whereas the latest results show a 5.5 night average stay – reflecting the impact of the December holidays.

Says Salters, "It has recently been reported that the international tourism industry to South Africa generated more foreign exchange than gold in 2006 – South Africa attracted more than six million international visitors in the first nine months of last

year. With this in mind, it is increasingly important to monitor the levels of satisfaction among travellers, both domestic and foreign especially in the run-up to the 2010 World Cup."

The Synovate Domestic Tourism Barometer



click to enlarge

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 4 was conducted over the last six months of 2006. 500 respondents were interviewed across South Africa.

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