

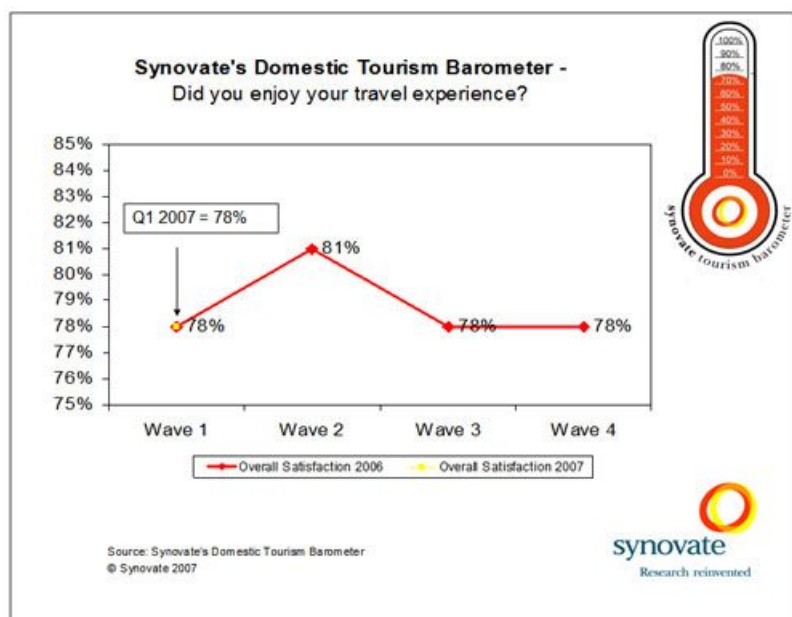
Domestic tourism stays stable

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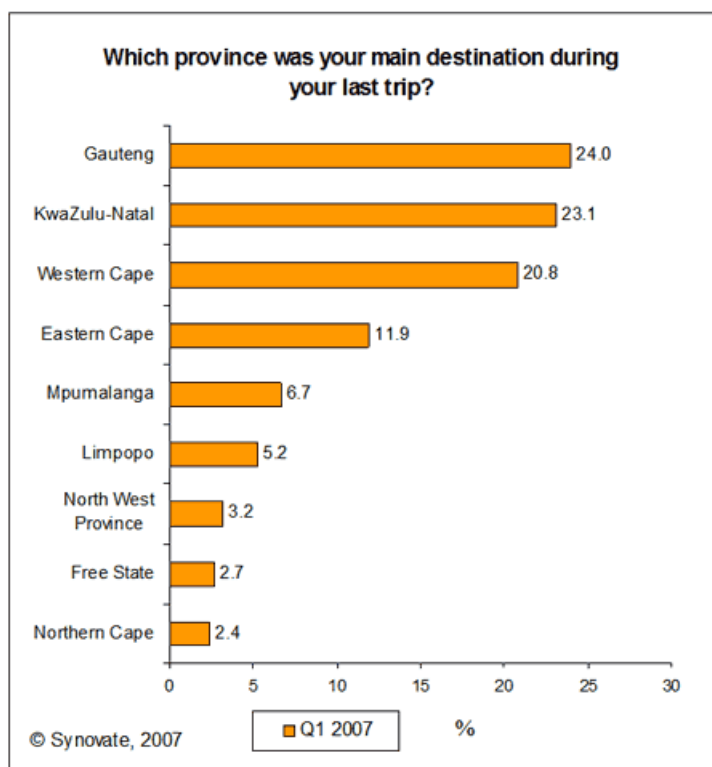
The first quarter of 2007 has seen little fluctuation satisfaction amongst domestic travellers, according to the latest results from Synovate's Domestic Tourism Barometer, a unique study focusing on the more affluent domestic traveller.

Overall satisfaction when travelling within South Africa remains at 78%. However, when comparing this score to that yielded this time last year, there has been a drop in satisfaction (from 81% in the first quarter of 2006).



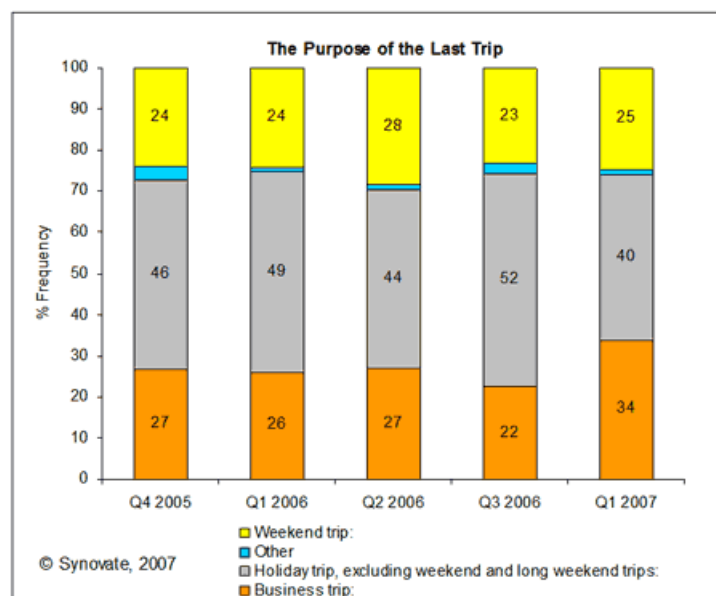
The findings of this reading of the Synovate Domestic Tourism Barometer represent the views of those people that have travelled within South Africa in the first quarter in 2007. Synovate interviewed 1206 people from all nine provinces.

In this quarter Gauteng and KwaZulu-Natal were the most popular destinations, receiving 24% and 23% of domestic travellers respectively. Gauteng received the lowest overall satisfaction score (74%), while KwaZulu Natal received one of the highest (82%). A higher proportion of visits to Gauteng are business related (averaging 3.3 over the past 3 months).



Source: Synovate's Domestic Tourism Barometer Q1 2007

The overall trend this quarter is a noticeable increase in business trips. This is definitely something the industry need to take into consideration, particularly since the overall satisfaction score for business travellers (at 71%) is 10% lower than those travelling on holiday (81%). These lower satisfaction levels are possibly inevitable, just due to the nature of the trip, but those providing a service to business travellers can focus on meeting their specific needs. This is particularly necessary for those in Gauteng, considering that 57% of the last trips undertaken to this province by respondents to this survey were for business purposes. Improve their satisfaction, and this will uplift the levels of travel experience in Gauteng overall.



Source: Synovate's Domestic Tourism Barometer Q1 2007

Accommodation: Just over a third of respondents (34%) chose to stay at hotels – this has increased from last year. Business travellers mostly made use of hotels (53%) on their trips.

Duration of trip: One to two night stays have increased markedly in the first quarter of 2007. 37% of the sample report a trip of this duration, compared to only 5% of the sample in the last reading of the Domestic Tourism Barometer. 7 – 10 night stays are taken mostly by those without children and stays longer than 10 nights are more common R10 000 – R 20 000 income segments.

Overall, 21% of respondents reported **renting a vehicle** while on their trip. This is most common when the destination is Gauteng or Western Cape, as well as amongst business travellers.

Average expenditure amounted to R965 per day across the country. Gauteng visitors' expenditure dropped below the average at R874 per day, while Western Cape has the highest at R 1226 per day. It is also worth noting that business trips yield higher spenders than holiday trips do.

Did you enjoy your stay?

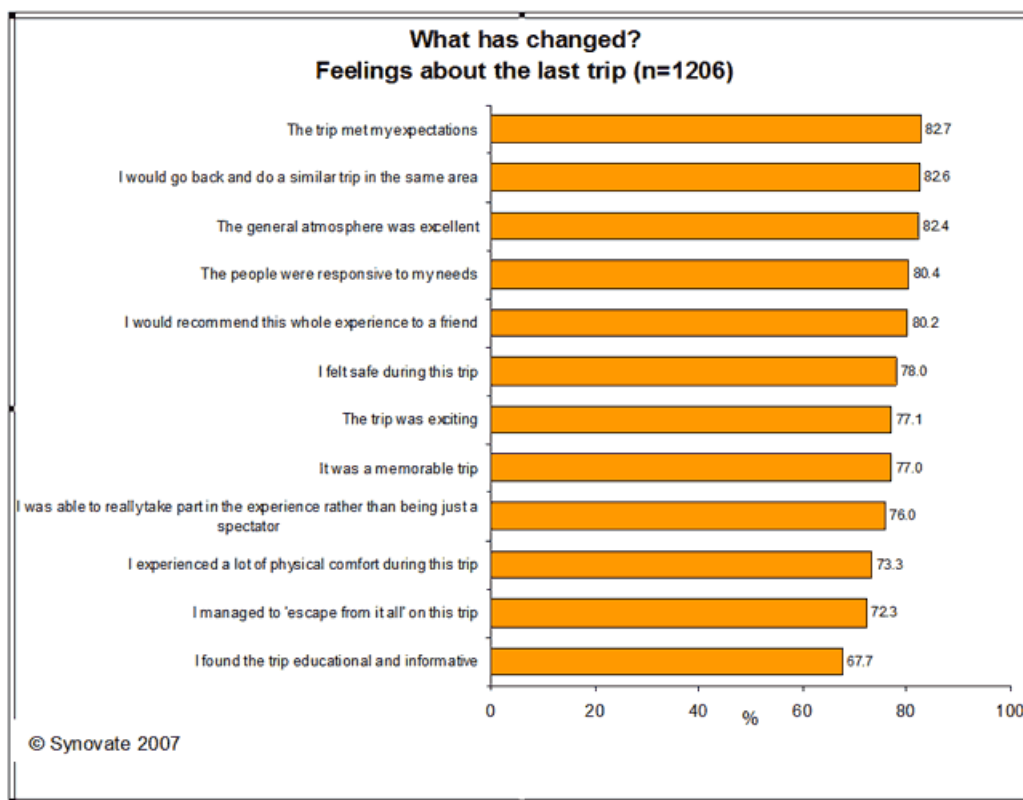
“Offering a unique and exciting experience is key for those involved in the domestic tourism industry” states Jon Salters, Managing Director of Synovate Sub-Saharan Africa, “and the purpose of the Barometer is to measure that experience, as well as the more rational quality of the service aspects of the trip. On the whole, tourism in South Africa has proved to be capable of meeting travellers' demands.”

Once again, highest levels of satisfaction were recorded with the *general atmosphere of the trip, responsiveness of staff* and how the *trip met expectations* – all scored over 80%. *Accommodation, ease of finding one's way around* and the *friendliness and helpfulness of staff* also continue to score above 80% on the physical attribute ratings.

Noted improvements in this quarter's reading emerged when respondents were asked to consider their last trip. 89% of the respondents stated that they *would stay there again* (compared to 80% from the last reading). 84% said that they would *advise their friends to stay there* (also compared to 80% from the last reading).

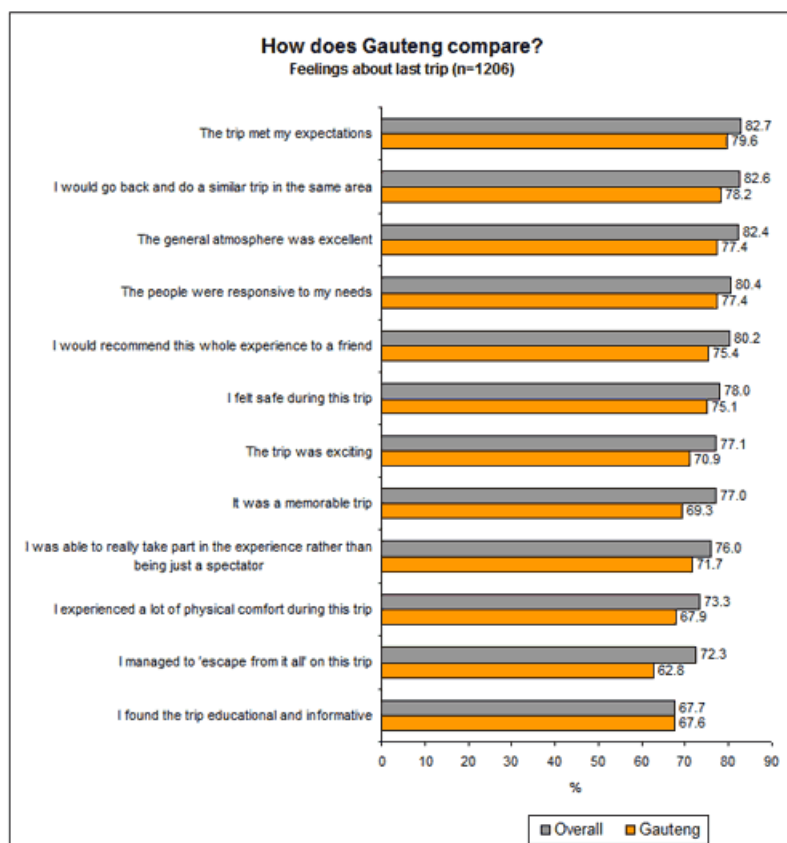
Answering whether or not the *trip was exciting*, more than three quarters (78%) of respondents felt that it was. Gauteng received the lowest score (71%) perhaps due to the high proportion of business travellers. Highest levels of excitement were experienced by those respondents falling between 25 and 34 years of age. This score is particularly low for those travelling on business (67%)

Being able to *escape from it all* is an important driver of loyalty. Overall, respondents rated this aspect of their trip at 72%. Gauteng scored the lowest at 63%.



Source: Synovate's Domestic Tourism Barometer Q1 2007

Focus on Gauteng:



Source: Synovate's Domestic Tourism Barometer Q1 2007

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 1206 domestic travellers from the more affluent market across the nine provinces.

Fieldwork for Quarter 1 2007 was conducted during March and April 2007.

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