

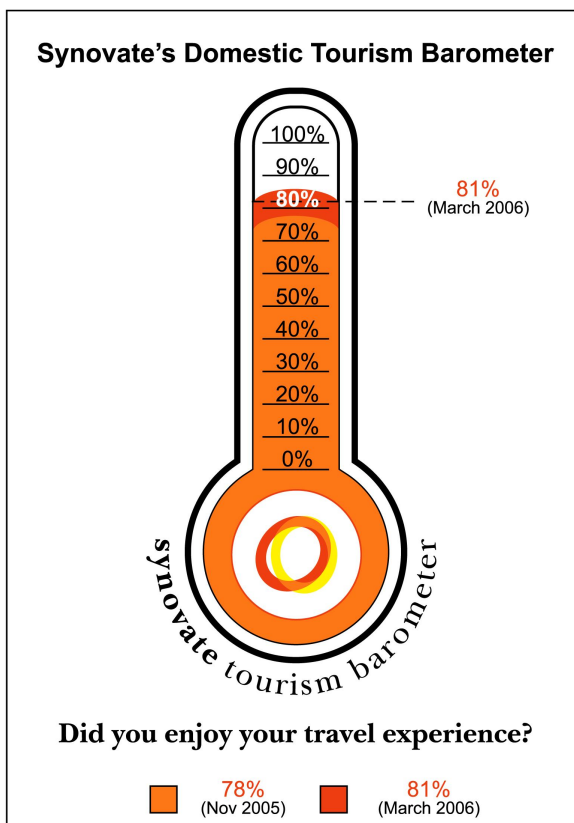
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Satisfaction Levels Rising

THE average satisfaction levels of domestic travellers in South Africa has risen from 78% in November last year to 81% in March this year. This is according to Synovate's South African Domestic Tourism Barometer, a unique study focusing on the more affluent domestic traveller.



In terms of size and value, SA's domestic tourism market is comparable with that of international tourism to SA, so it is a substantial contributor to the country's economy.

The Synovate barometer measures factors affecting the travel experience overall, whether it be for a weekend getaway, holiday or business. The company interviewed 250 South African domestic travellers from the more affluent market (LSM 7 - 10) across the nine provinces.

"A high level of satisfaction in the domestic tourism market is good news for the South African economy," says Jon Salters, MD of Synovate in South Africa. "A strong domestic tourism industry will offset fluctuations in international tourism, which is subject to economic and political issues.

"Tourism supports sustained job creation and allows the industry continually to improve. A satisfied domestic tourist is an ambassador for SA."

The various attributes contributing to satisfaction in the Barometer can be divided into loyalty, physical and experiential elements (see graph).

"The loyalty ratings were above the barometer index of 81%," said Salters. "Loyal customers become advocates who enthusiastically spread the word, dramatically increasing tourism's revenue. By retaining more existing, satisfied customers this industry can significantly boost profits and growth."

Although there has been a substantial increase in the rating for "I found the trip educational and informative" from 64% in the November reading to 71% in March, there is obvious room for improvement as this remains the lowest scoring attribute.

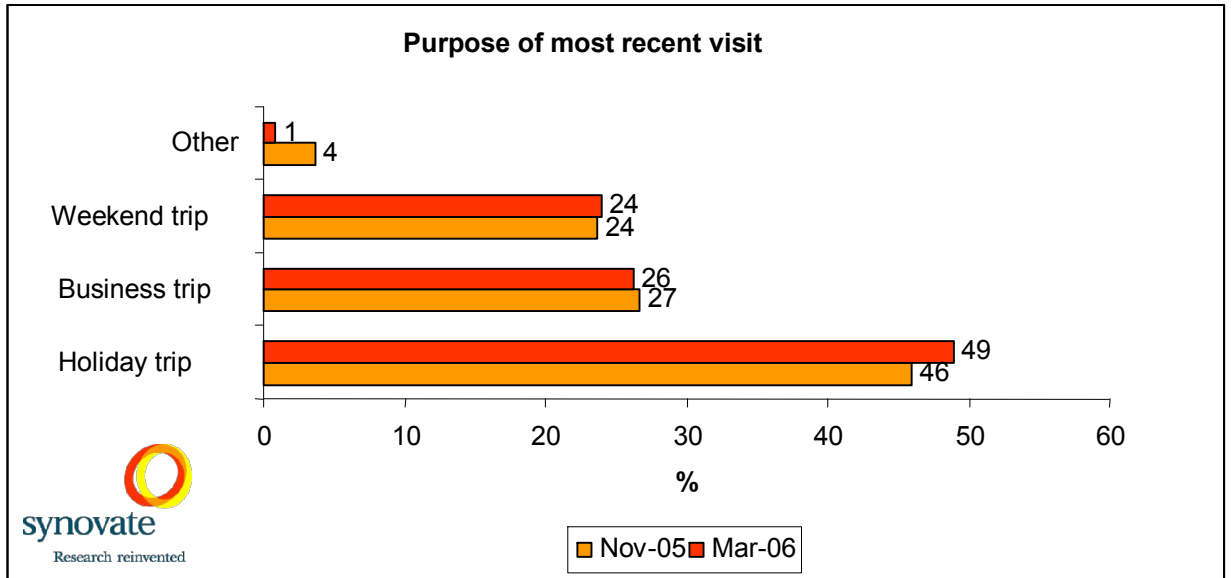
"By providing better visitor information the tourism industry will be able to better educate and inform the travellers. This in turn will help the 'by word-of-mouth' marketing of the place visited by the traveller," says Salters.

Synovate has identified five key drivers of loyalty in this market. These have a greater impact on the index than the other attributes:

- The trip met my expectations.
- People were responsive to my needs.
- The atmosphere was excellent.
- I managed to "escape from it all".
- It was a memorable trip.

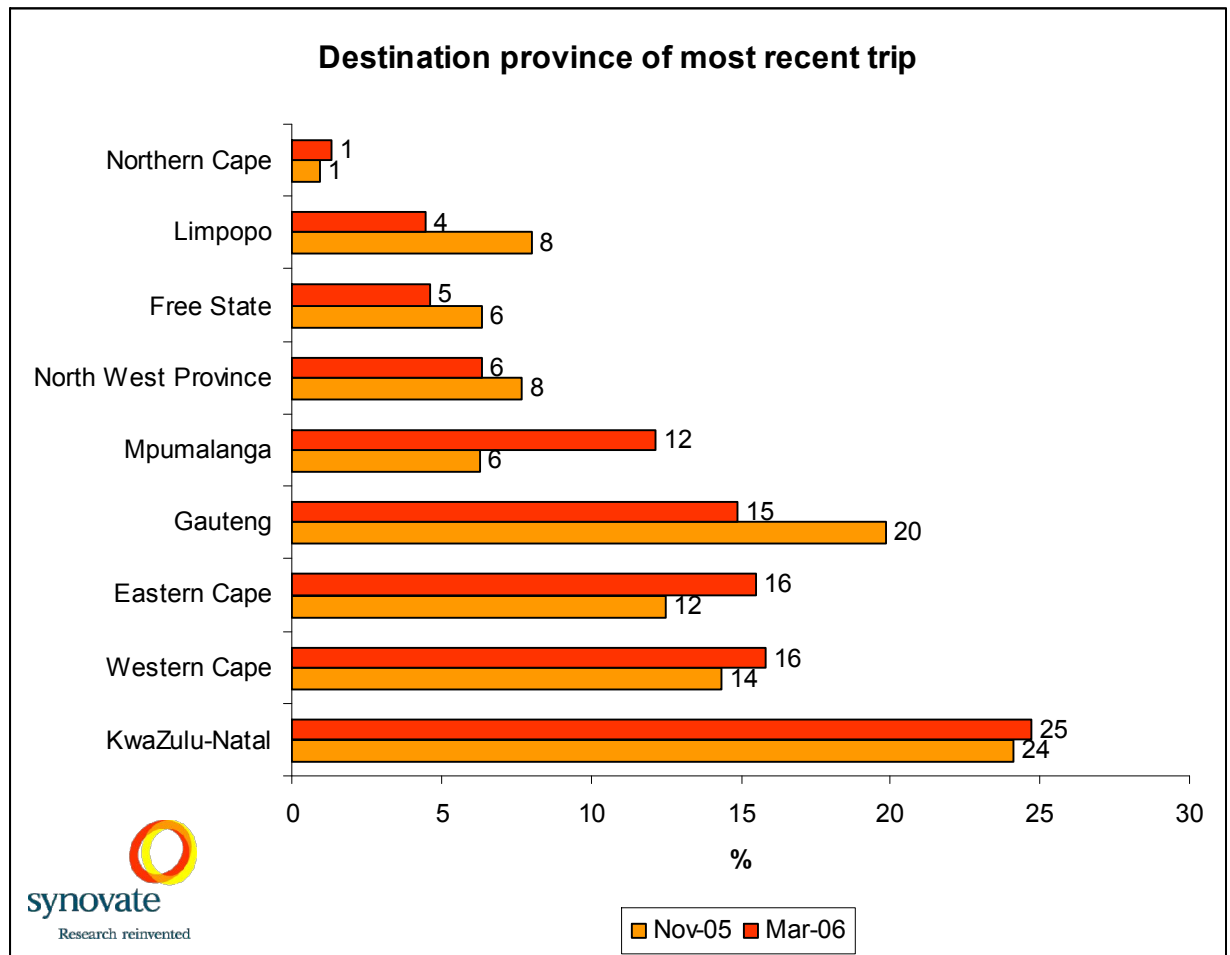
The second-lowest scoring attribute of "I managed to escape from it all on this trip" (75%) is one of the key drivers and has seen a substantial increase from 69% in the first Barometer reading in November.

Fieldwork was conducted from March 2-16 with regards to the respondents' most recent trip. The seasonality of type of travel was evident as the highest proportion of travellers (49%) were on holiday trips (excluding weekends and long weekend trips). Just over a quarter of travellers were on business trips.



When looking at the purpose of travel over the past year, weekend trips were the most common, with travellers taking on average four weekend trips a year. Business trips were the second most common at three per respondent per year.

The most popular destination is KwaZulu-Natal, with a quarter of domestic travellers visiting this province. Western Cape, Eastern Cape and Gauteng follow with about 15%.



Hotels were most popular (29% of respondents), 28% stayed in self-catering accommodation and 85% of all travellers said they would stay at the same place again, while 80% would recommend the place to their friends.

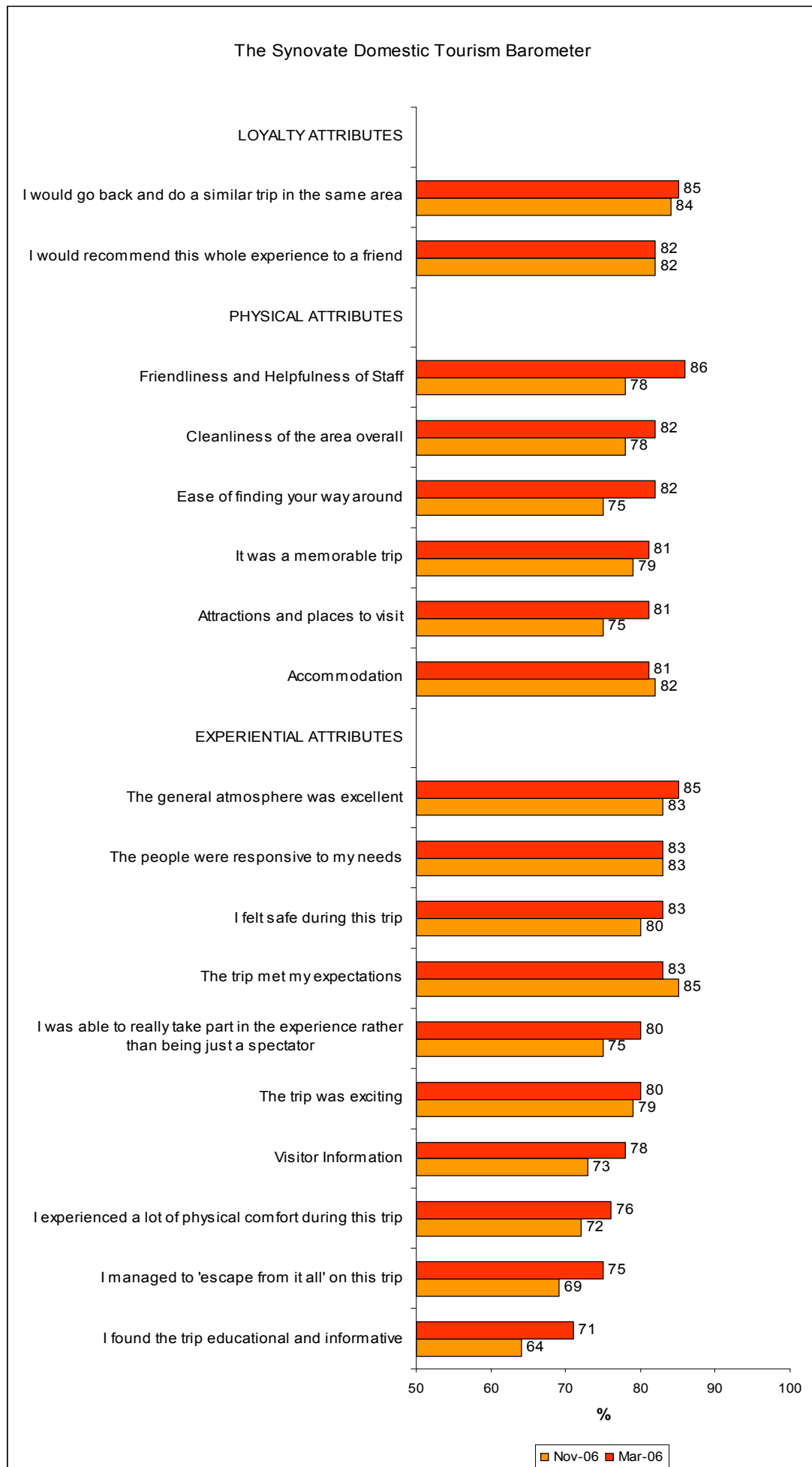
Two-thirds of respondents stayed between one and four nights.

“Tourism businesses would benefit from offering specials based on a shorter length of travel. Two- to four-day packages offering quick, exciting visits with pre-organised tours to local attractions would suit the weekend and business traveler,” says Salters.

Consistent with the previous reading, close to half the respondents made their accommodation bookings via telephone or call centre. This method was chosen over travel agencies, internet or walk-in.

Transportation means to and from destinations:

- Most people used their own vehicle (77%).
- 16% of those Synovate interviewed flew.
- 14% used a rented car at their destination.



Focus on Gauteng

(Note: Synovate combined the results from Wave 1 and 2 for The Gauteng Province – these combined results are discussed below)

Travellers to Gauteng were especially satisfied with the quality of accommodation, which obtained a rating of 84%. To corroborate this, when asked whether they would stay at the same place again, 87% of respondents who visited Gauteng said they were likely to do so.

Another element of domestic tourism which received exceptional ratings (83%) was the attractions and places to visit.

“This is good news indeed for the Gauteng Tourism Authority. The Apartheid Museum, the growing popularity of township tours (to name but a few) are tangible assets on which the tourism industry can build in promoting Gauteng as a unique tourist destination.

“The recently opened Rock Art Museum at the University of the Witwatersrand also promises to be an educational tourist attraction. The turbulent history of our country can now become an opportunity for upliftment both economically for the tourism industry, and for individuals due to job creation in this flourishing sector,” says Salters.

The hospitality industry in Gauteng is providing high levels of service. Respondents’ satisfaction with the “friendliness and helpfulness of staff” scores a high 82% as is their feeling that “people were responsive to my needs”.

Visitors to Gauteng who were interviewed by Synovate felt **safe** during their trip – this attribute scored 81%.

So why are travellers to Gauteng less satisfied?

The Gauteng Satisfaction Index, at 75% for the last two interviewing periods combined, was the lowest of the provinces. Salters ascribes this to “purpose of visit”.

“We found that visitors to Gauteng were less able to ‘escape from it all’ on their trip. This important driver of loyalty was rated a mediocre 59%. Travellers go to Gauteng largely for business, not for a holiday.”

Forty percent of the travellers interviewed stayed only one or two nights, while another 35% stayed three to four nights.

“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,” says Salters.

- Ends -

About Synovate

Synovate, the market research arm of Aegis Group plc, generates consumer insights that drive competitive marketing solutions. The network provides clients with cohesive global support and a comprehensive suite of research solutions. Synovate employs almost 5,000 staff in 50 countries.

More information on Synovate can be found at www.synovate.com and www.synovate.co.za