

Temperature of Domestic Tourism in South Africa? Hot!

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Travel consumers want atmosphere, memories, escapism, responsive hosts and their expectations met, according to Synovate's first measurement of the South African Domestic Tourism Barometer, a unique study focusing on the upper LSM's.

Synovate found an average satisfaction level of 78% in the first quarter, indicating a high level of satisfaction amongst domestic travellers.



The key ingredients for a satisfying travel experience are the atmosphere, the feeling that you got away from it all, and of course, the memories.

"Offering an exciting, unique experience is key," explained Jon Salters, Managing Director of Synovate in South Africa. "In fact, the five factors that had the greatest bearing on loyalty all related to the experience, rather than the actual physical surroundings."

The purpose of the study is to create a Barometer that measures not only the more rational Quality of Service aspects, but also the Experience itself when taking a trip, be it for a weekend, holiday or business. Synovate interviewed 250 South African domestic tourists (from the upper LSM's) across the nine provinces.

On the whole, tourism in South Africa has proved to be capable of meeting travellers' demands. In particular, respondents were very satisfied with the atmosphere (satisfaction rating of 83% overall) and the responsiveness of people that they encountered on their trip (83%). Another very positive finding was that the vast majority (80%) of respondents agreed that they felt safe whilst on holiday.

Excitement scored higher for the business traveller (83%) than holiday makers (68%). This may be due to the inherent nature of business travel - where there is a set objective and challenge to be met. Holiday makers, on the other hand, are travelling "to get away from it all" and relax.

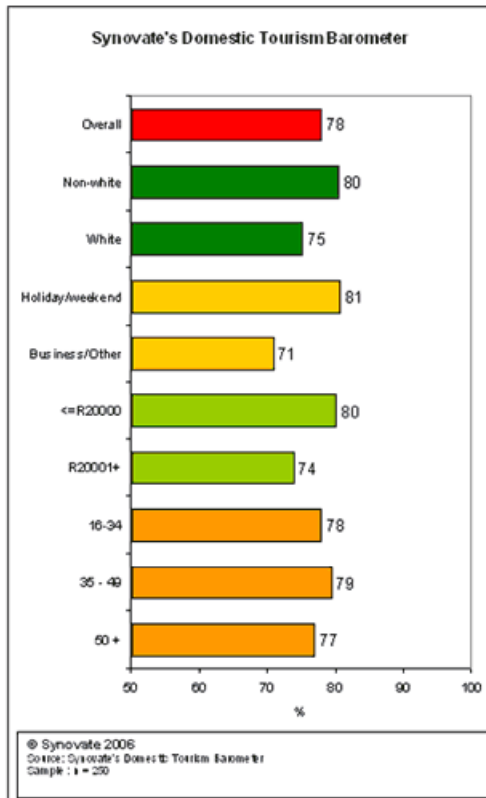
People who were travelling for relaxation - a holiday or weekend retreat - were much more satisfied overall (81%), than

those who travelled for business or other purposes (71%).

White travellers placed a lot more emphasis on "escaping from it all". They also differed from other population groups in that they were considerably more critical - a barometer reading of 75% as opposed to the 80% reading from the other population groups combined.

Accommodation received good ratings, but other physical aspects of the tourism offering do need to be addressed. Many respondents felt that visitor information was a weakness in their overall holiday experience (at 73% on the barometer).

In terms of income, overall satisfaction was lowest amongst respondents earning more than R20000 per month (74%).

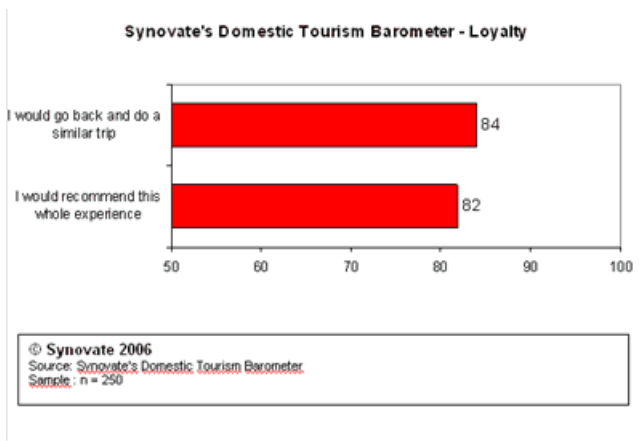


Loyalty

Measuring loyalty entails assessing the extent to which respondents report that they would recommend the destination to someone else as well as wanting to re-live the experience.

So what would make travellers recommend a destination or relive the experience?

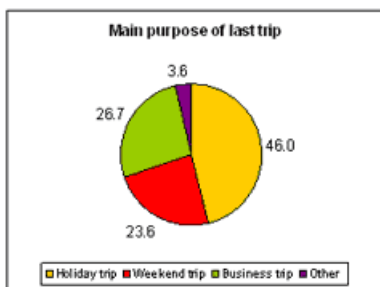
1. The trip meets expectations
2. The "hosts" or locals are responsive to traveller's needs
3. The general atmosphere
4. The effect of being able to escape from it all
5. The memorability of the trip



When looking at the sub groups in the respondents, various trends emerged relating to Loyalty.

- People who travelled for business / other purposes were most likely to recommend and to want to repeat the trip if it was exciting and they were able to take part in the experience rather than being a spectator
- Responsiveness and safety were very important to people aged 16-34
- Responsiveness was also important to travellers in the less than R10 000 per month category
- White travellers placed a lot of emphasis on "escaping from it all"
- The general atmosphere was a main loyalty driver for holiday & weekend travellers, non-white travellers, travellers over 35, and travellers with an income over R20 000 per month

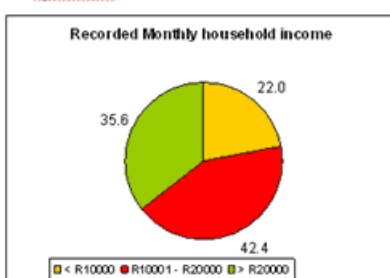
Synovate's Domestic Tourism Barometer



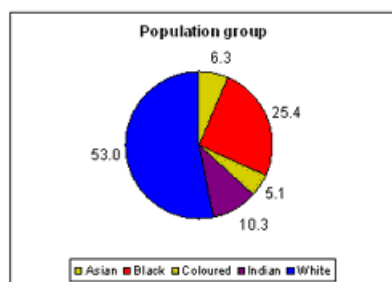
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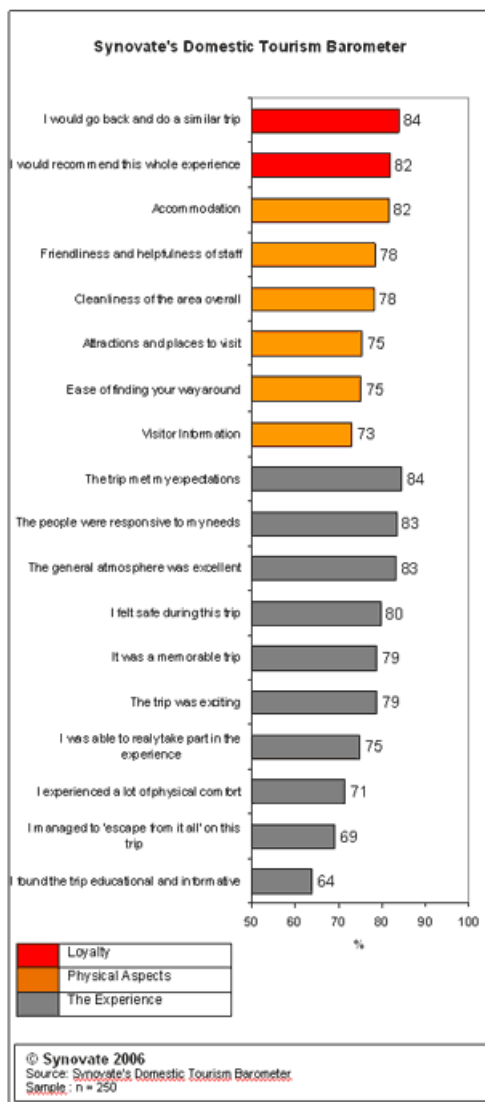
Synovate's Domestic Tourism Barometer



Synovate's Domestic Tourism Barometer



"The purpose of Domestic Tourism Barometer study is to create a measure not only the more rational Quality of Service aspects in the Tourism Industry, but also the Experience itself. Destinations have to offer truly unique travel experiences, on an emotional, physical and intellectual level," explained Salters.



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