

The Dusi 2014: Topline Summary Report



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Methodology



- Face to face survey with a probability sample of 207 respondents
- Respondents systematically selected by hour during two days of the event, on Thursday 13th of February and Saturday 15th of February 2014



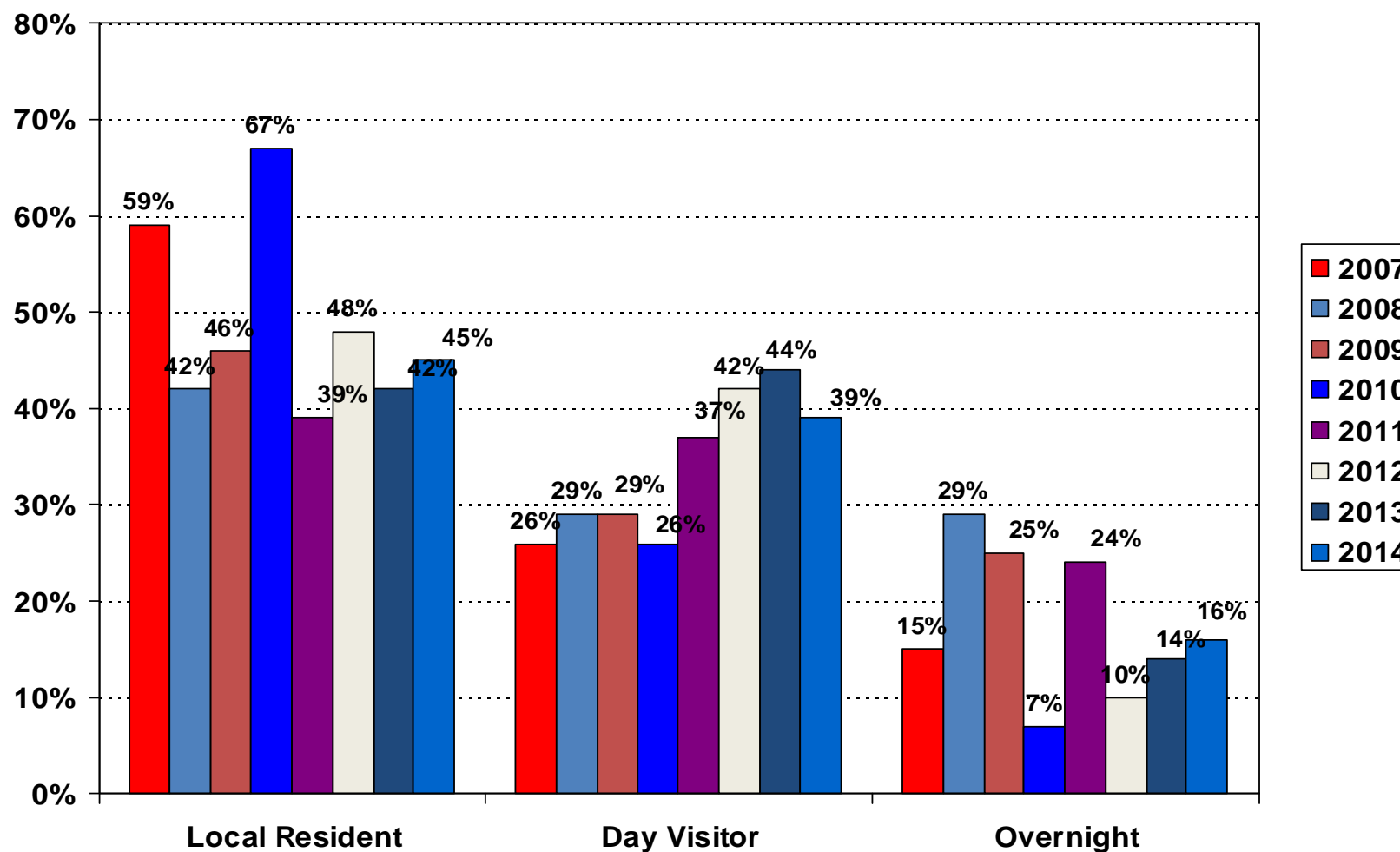
Positive Highlights



- The length of stay increased for 3 night stay, from 20% in 2012 to 39% in 2013.
- 89% of the respondents indicated that they would attend the event again.
- 97% of the respondents had a good or excellent experience at the event.
- 84% of the respondents did not experience any problems at the event.
- 83% would visit KwaZulu-Natal in the next 12 months for a holiday.
- 96% indicated that they are willing to recommend the event to friends and family.



Nature of Dusi Canoe Marathon Spectators and Participants – Residents vs Visitors



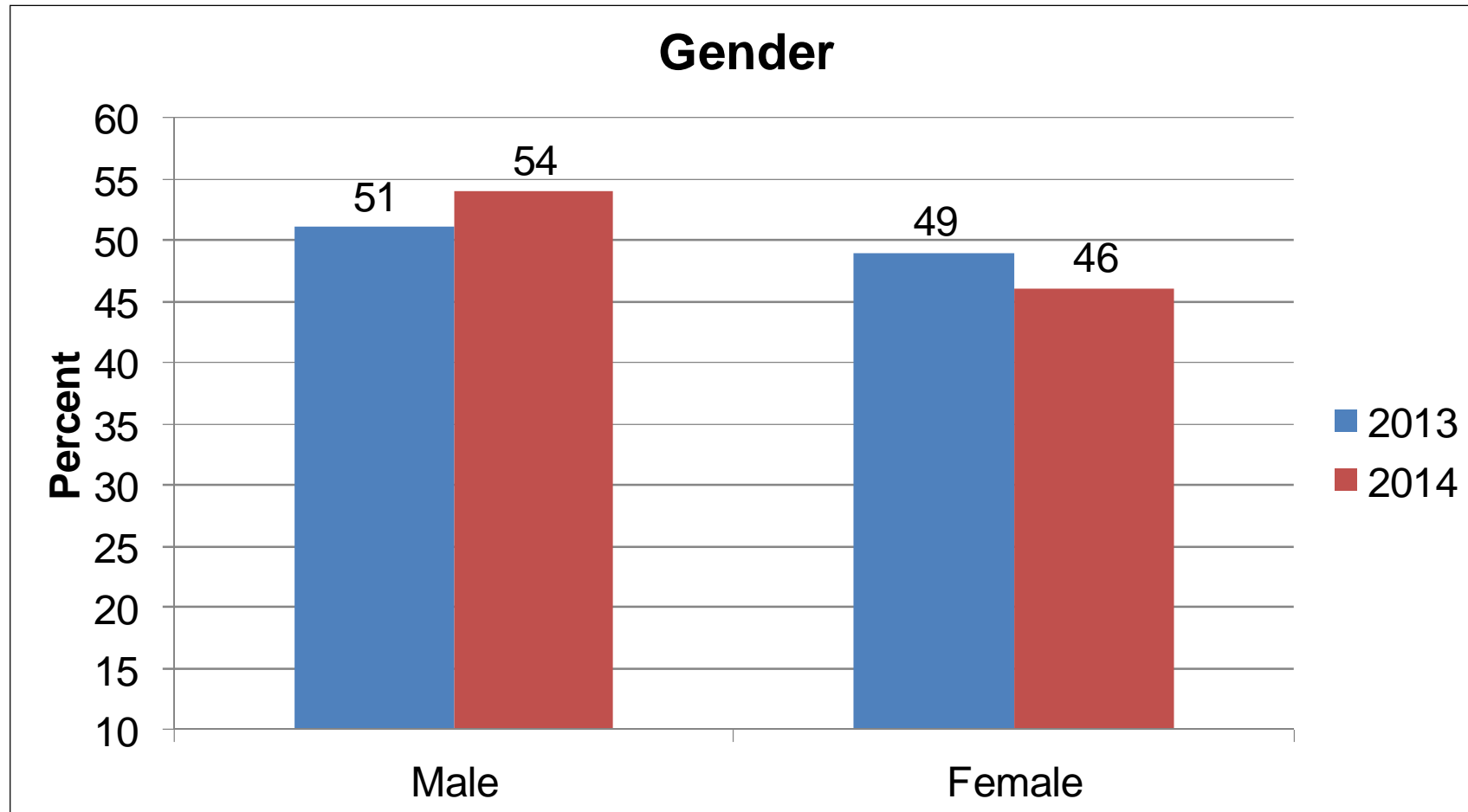
Nature of the Dusi Canoe Marathon Spectators and Participants – Residents vs Visitors (cont'd)



- A Z-Test of two independent sample proportions revealed the following:
 - there was no statistically significant decrease in the proportion of respondents who were day visitors when comparing 2013 and 2014.



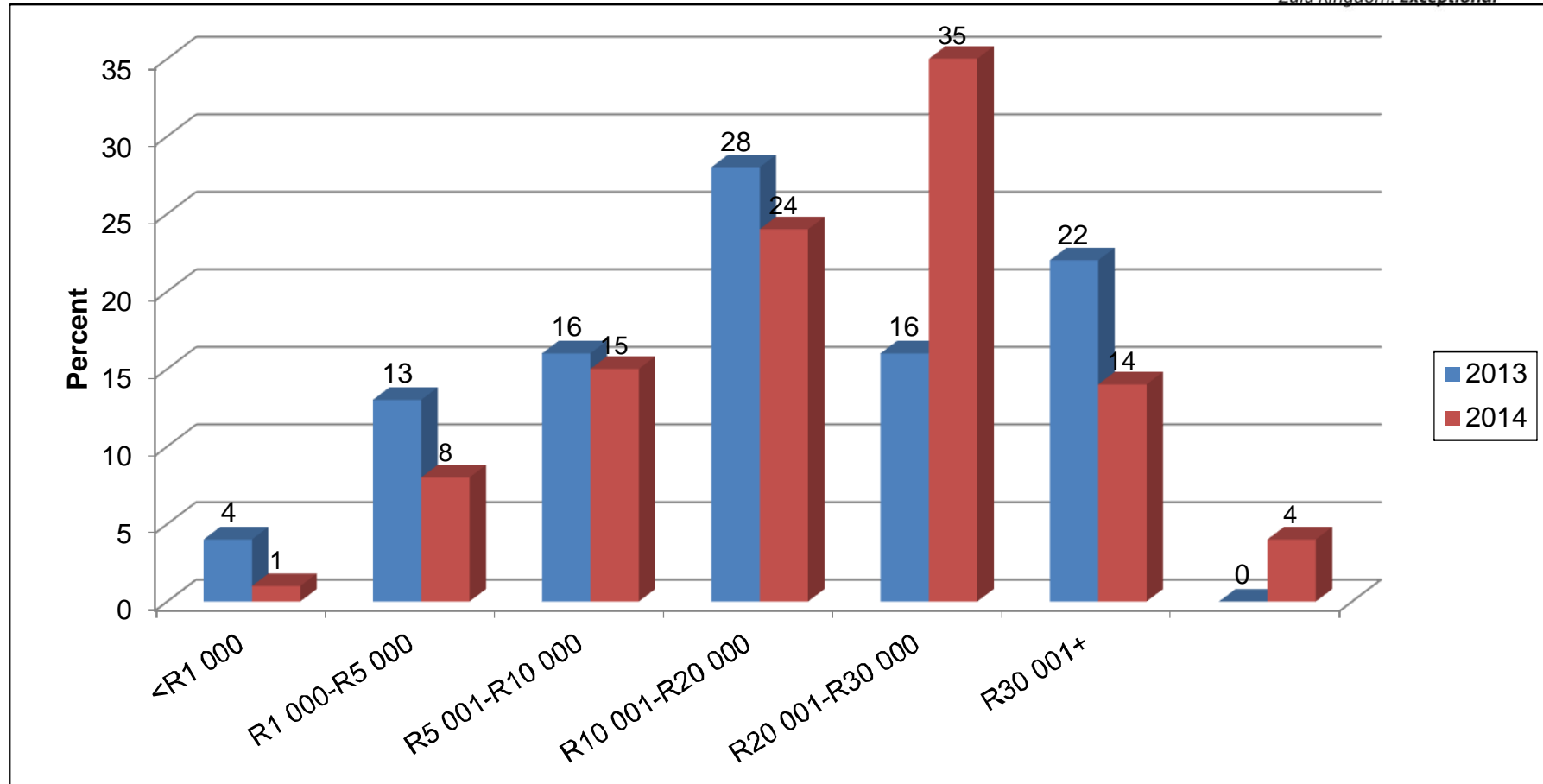
Respondent Gender



Almost as many females as males attended the event. Due to the higher number of males participating in the event it can be assumed then that most of the spectators were female.



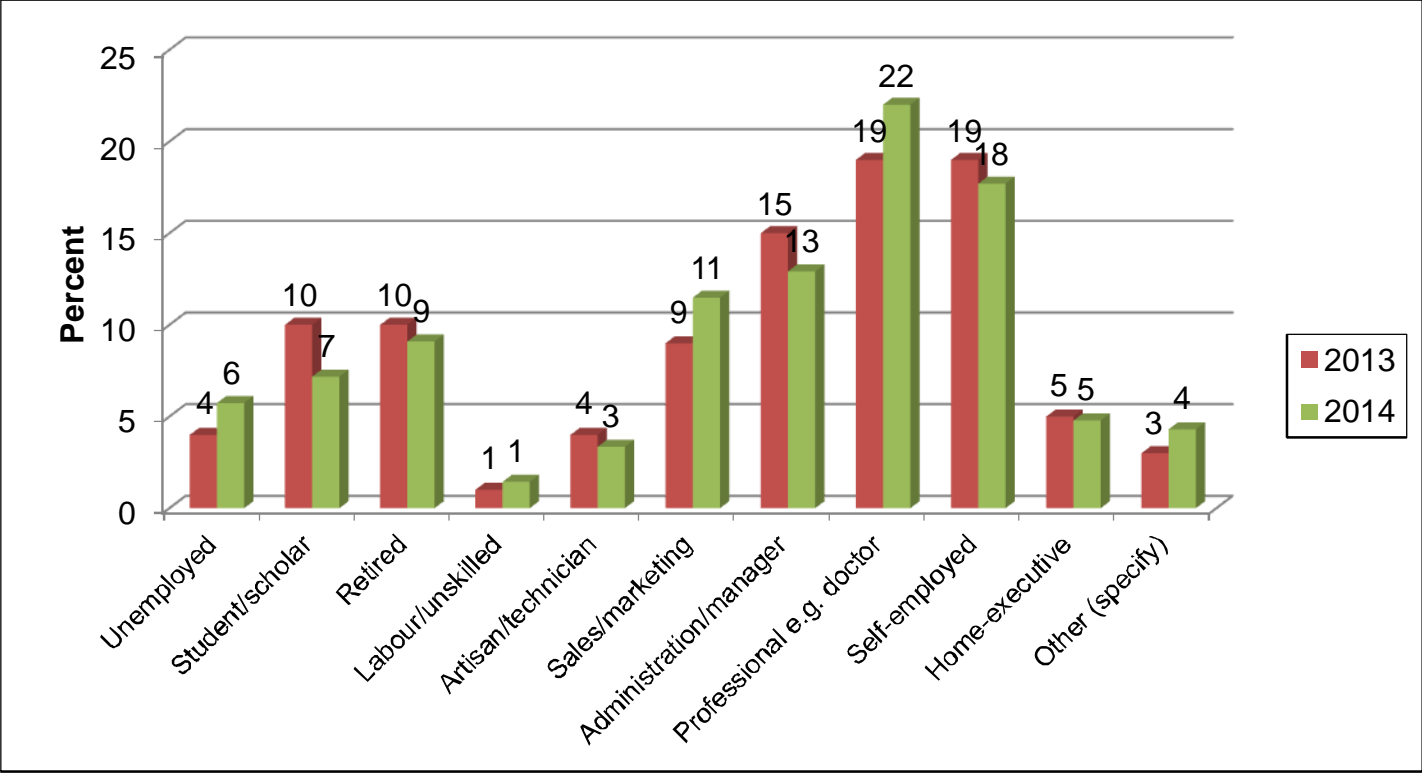
Respondent Income



Most respondents at the Dusi have incomes between R10 001 and R20 000 per month. The next highest is more than R30 000 per month. This finding illustrates that this sport attracts fairly high income spectators/participants. It is important to note that the sport of canoeing is fairly costly in terms of the purchasing a canoe, associated equipment and travelling to various events. Respondents earning between R20 001 – R30 000 showed a significant increase compared with 2013.



Respondent Occupation



This slide supports slide 7, in that most respondents were professionals or self-employed, thus earning a relatively good income. Both figure 3 and 4 indicated that this event provides positive and strong market access to high income earners with disposable income.



Nature of the Dusi Canoe Marathon Respondents



South Africa Province of Residence

| | KZN | Gauteng | W Cape | N Cape | E Cape | Free State | Mpuma-langa | Limpopo | North West |
|-------------|------------|----------------|---------------|---------------|---------------|-------------------|--------------------|----------------|-------------------|
| 2007 | 85% | 12% | 3% | 1% | - | - | - | - | - |
| 2008 | 66% | 24% | 6% | - | - | - | 1% | 1% | - |
| 2009 | 77% | 15% | 5% | - | 1% | - | 2% | - | - |
| 2010 | 93% | 4% | 2% | - | 1% | - | - | - | - |
| 2011 | 79% | 19% | 1% | - | - | 0.50% | - | - | 0.50% |
| 2012 | 91% | 5% | 3% | - | - | - | - | - | 1% |
| 2013 | 86% | 11% | 2% | - | - | 1% | 1% | - | - |
| 2014 | 88% | 8% | 2% | - | 1% | - | 1% | - | - |

There was no statistical difference in the proportion of respondents from KwaZulu-Natal when comparing 2013 to 2014.



Nature of the Dusi Canoe Marathon Participants



| 2014 | KZN | Gauteng | W Cape | Central Districts | E Cape | International |
|----------------|------------|----------------|---------------|--------------------------|---------------|----------------------|
| Percent | 74% | 16% | 3% | 1% | 3% | 3% |
| Number | 1204 | 257 | 57 | 19 | 52 | 46 |



Estimated Mean Spend per Category



| | 2011 | 2012 | 2013 | 2014 |
|---------------------|--------|--------|--------|--------|
| Accommodation | R1 642 | R2 843 | R1 983 | R1 729 |
| Transport | R733 | R716 | R757 | R664 |
| Food and Beverage | R389 | R420 | R397 | R564 |
| Entertainment | R346 | R244 | R492 | R730 |
| Souvenirs | R268 | R458 | R282 | R490 |
| Average Total Spend | R1 031 | R1 542 | R1 274 | R1 776 |

The above table indicated that there has been a decrease in the mean spend for accommodation. This may be due to the decrease in 4 and over 4 nights stays and an increase in 3 night stays. However there was an increase in entertainment spending. This may be because of the decrease in the number of nights stayed. The average total spend has increased and is the highest since 2011. This had a positive impact on the local economy and clearly indicated that this event contributes to local economy.



Estimated Economic Impact



| | 2010 | | 2011 | | 2012 | | 2013 | | 2014 | |
|--------------------------------|-------|--------|-------|--------|-------|--------|-------|--------|-------|--------|
| | N | Mean | N | Mean | N | Mean | N | Mean | N | Mean |
| Participants | 1 800 | R1 193 | 1 741 | R1 321 | 1 679 | R2 564 | 1 564 | R1 694 | 1 635 | R2 189 |
| Spectators: local residents | 3 685 | R500 | 1 313 | R255 | 1 680 | R 469 | 2 520 | R437 | 3 060 | R662 |
| Spectators: day visitors | 1 430 | R790 | 1 750 | R524 | 1 470 | R1 184 | 2 640 | R718 | 2 160 | R1 323 |
| Spectators: overnight visitors | 385 | R2 964 | 438 | R3 035 | 600 | R4 916 | 840 | R4 874 | 840 | R6 453 |

Mean spend across all categories has increased when comparing 2013 and 2014. This may be due to the higher costs of travelling (fuel and toll fees) and of accommodation.



Estimated Economic Impact (cont'd)

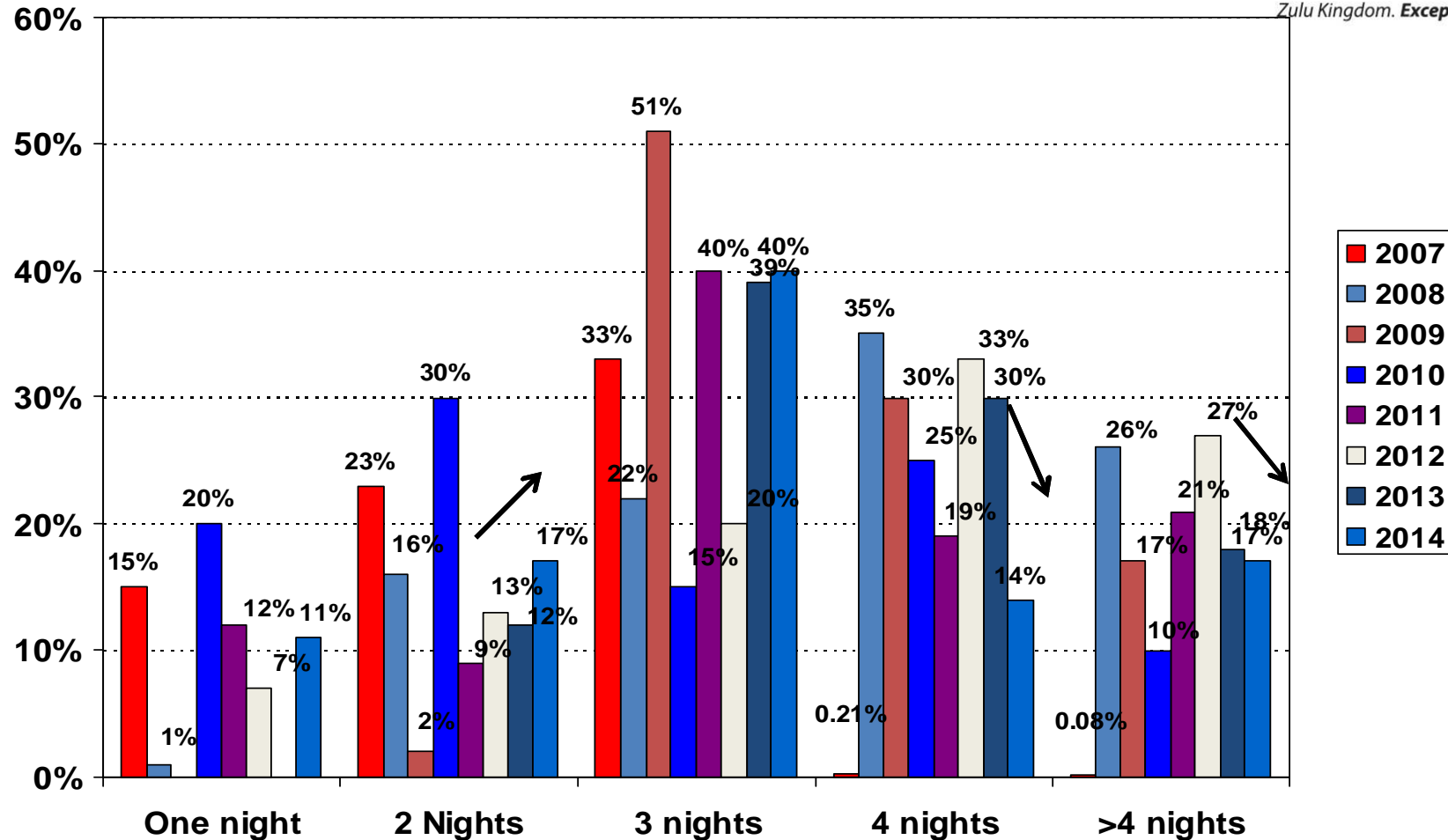


| | | 2010 | 2011 | 2012 | 2013 | 2014 |
|--|-------------|------------|------------|-------------|-------------|-------------|
| Estimated Direct Impact | At Least: | R1 641 956 | R3 307 277 | R3 113 415 | R4 999 453 | R8 436 420 |
| | As much as: | R4 959 634 | R6 455 964 | R12 419 598 | R12 461 510 | R15 354 487 |
| Estimated Total Impact (multiplier of 1.42) | At least | R2 331 578 | R4 696 333 | R4 421 050 | R7 009 223 | R11 979 420 |
| | As much | R7 042 680 | R9 167 469 | R17 635 055 | R17 695 345 | R21 803 372 |
| Estimated Total Impact (multiplier of 2.0) | | | | | R9 998 906 | R16 872 840 |
| | | | | | R24 923 302 | R30 708 975 |

Note: international standard practice suggests that only visitor spend and not local spend should be used to determine the economic impact of an event.



Length of Stay

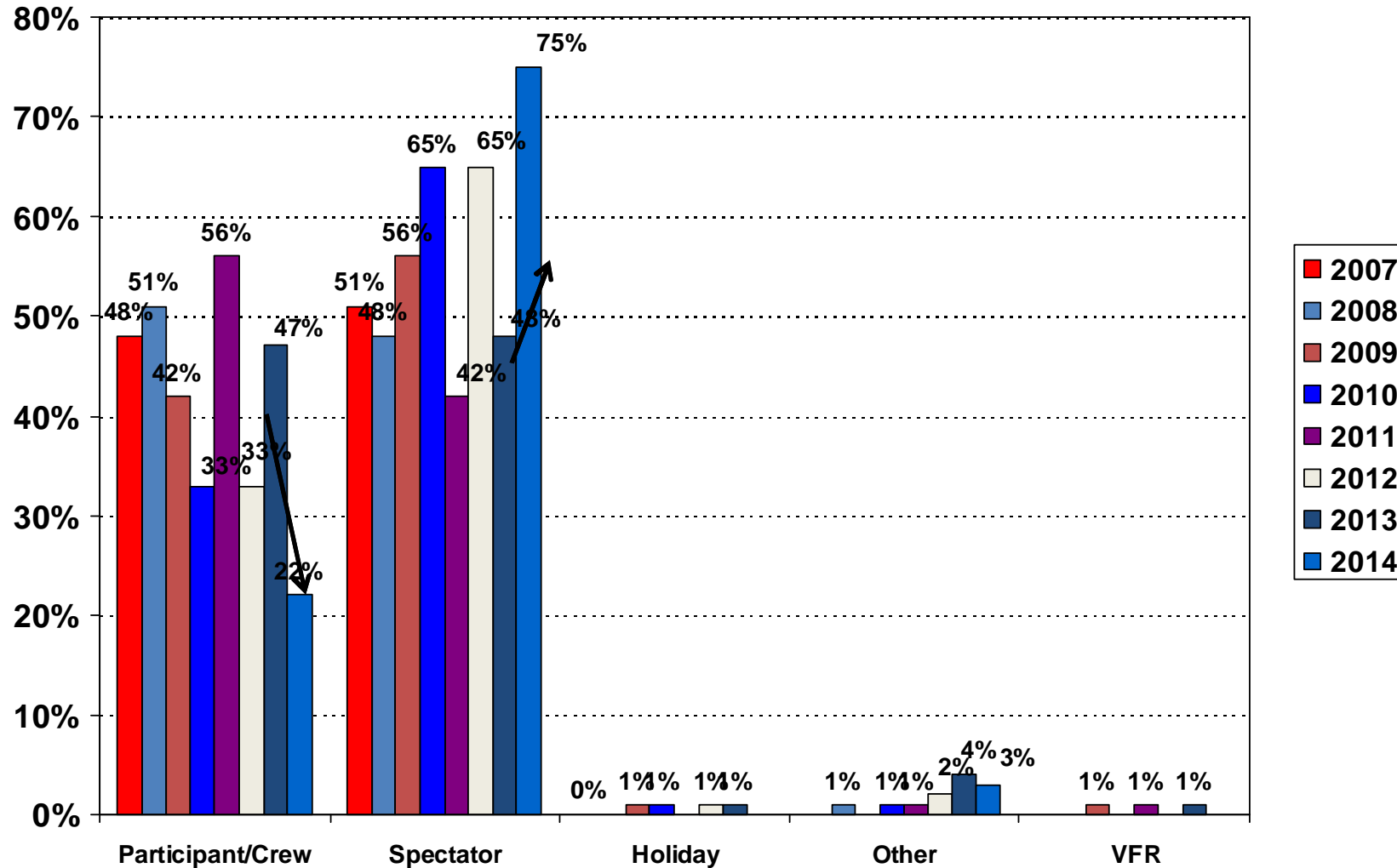


Average stay: 4 nights

There was an increase in the number of respondents who stayed 2 and 3 nights and a decrease in respondents who stayed 4 nights. This may have affected the mean spend depicted in slide 9. There also seems to have been a decline in respondents who stayed one night or over 4 nights. However, this was not statistically confirmed.



Primary reason for visiting area where event is taking place



Most (97%) of the respondents were at the event as either spectators or participants/crew support. There was a statistically significant difference between the two independent sample proportions of spectators in 2013 and 2014. This indicated that there was possibly an increase in the number of spectators in 2014 when compared to 2013.



Primary reason for visiting area where event is taking place (cont'd)



- A one-tailed Z-Test revealed the following:
 - There was a statistically significant difference between the two independent sample proportions of spectators in 2013 and 2014.



Accommodation: non-residents



| | Friends/ Relatives | Camping | B&B | Self- catering | Holiday Home | Hotel | Home | Holiday Flats | Family Hotel | Luxury Hotel | Guest House |
|-------------|-----------------------|------------|-----|-------------------|-----------------|-------|------------|------------------|-----------------|-----------------|----------------|
| 2006 | 26% | 45% | 14% | 3% | 3% | 3% | - | - | - | - | - |
| 2007 | 40% | 36% | 13% | 9% | 2% | 0% | - | - | - | - | - |
| 2008 | 17% | 21% | 16% | 5% | 2% | 2% | 29% | 5% | 3% | - | - |
| 2009 | 34% | 22% | 14% | 6% | - | 2% | 2% | 10% | 10% | - | - |
| 2010 | 56% | 26% | 11% | - | - | - | - | - | 4% | 4% | - |
| 2011 | 42% | 13% | 27% | 8% | - | - | - | 4% | 2% | - | 4% |
| 2012 | 55% | 18% | - | 27% | - | - | - | - | - | - | - |
| 2013 | 43% | 23% | 20% | 3% | 7% | - | - | - | 3% | - | - |
| 2014 | 33% | 12% | 24% | 6% | 3% | - | - | 9% | 6% | 6% | - |

Statistical analyses could not be performed as the number of responses was below the minimum required to perform such tests. However, in South Africa the trend is that most respondents at this type of event stay with friends and relatives. B&B and camping options were also very popular.



Transport to Event: non-residents



| | Private vehicle | Minibus-taxi | Rental | Train | Other | Bus | Airplane |
|-------------|------------------------|---------------------|---------------|--------------|--------------|------------|-----------------|
| 2007 | 86% | 5% | 5% | - | 2% | 1% | 1% |
| 2008 | 78% | 1% | 7% | - | 9% | - | 6% |
| 2009 | 96% | 1% | - | - | - | 1% | 2% |
| 2010 | 83% | 12% | 1% | 1% | 1% | - | 1% |
| 2011 | 92% | 1% | 5% | | 1% | - | 1% |
| 2012 | 85% | 6% | 3% | 1% | 4% | 2% | - |
| 2013 | 90% | 3% | 1% | - | 5% | - | 3% |
| 2014 | 92% | 3% | 1% | - | 2% | - | 1% |

Most of the respondents travelled to the event using private vehicles as has typically been the case. A Z-test revealed no statistically significant difference in the proportion of respondents who used private vehicles when comparing 2013 and 2014. Respondents would use private vehicles because of the support which needed to be provided to participants during the race. At the end of each day's paddling the participants would need to be collected at the finish and taken back the next morning for the start.



Influenced to attend?

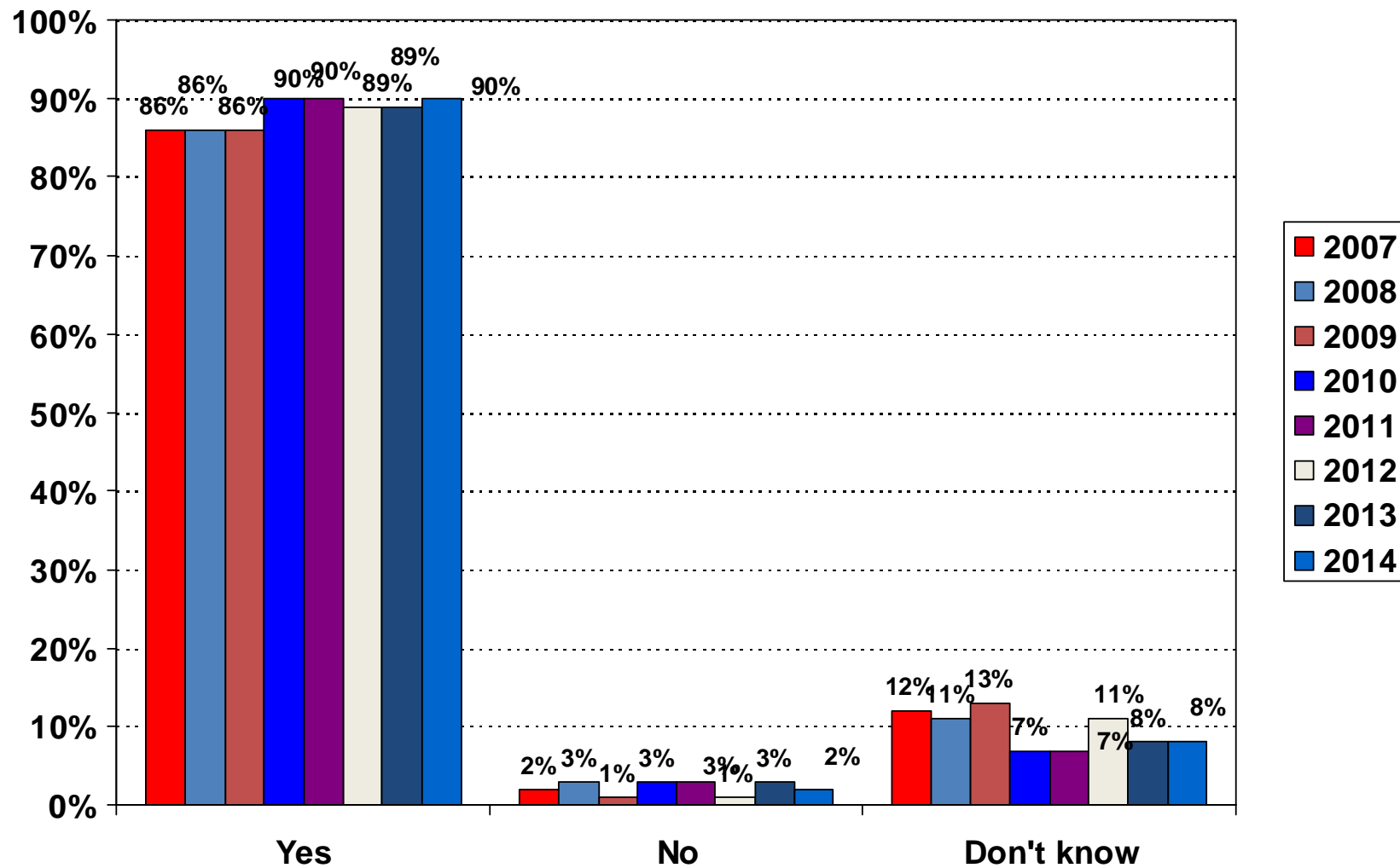


| | Word-of-mouth | Known Event | TV Ad | Newspaper/Magazine | Poster/Banner/Flyer | Radio | Other | Attended/participated previously |
|-------------|---------------|-------------|-------|--------------------|---------------------|-------|-------|----------------------------------|
| 2007 | 44% | 43% | 5% | 3% | 2% | 1% | 3% | - |
| 2008 | 49% | - | 9% | 9% | 2% | 2% | 29% | - |
| 2009 | 40% | - | - | 2% | 2% | 1% | 1% | 53% |
| 2010 | 50% | - | 2% | 5% | 1% | 2% | 1% | 39% |
| 2011 | 42% | - | 1% | - | - | - | 3% | 53% |
| 2012 | 12% | - | 5% | 3% | 3% | 4% | 1% | 71% |
| 2013 | 32% | - | 2% | 2% | 1% | 1% | 5% | 55% |
| 2014 | 30% | - | 2% | 1% | - | 1% | 6% | 58% |

Attended/participated previously is the most significant factor influencing people to attend the event as has been the case previously. This is followed by *word-of-mouth*. A Z-test revealed no statistically significant difference in the number of respondents who indicated that they *attended the event previously* when comparing 2013 and 2014.



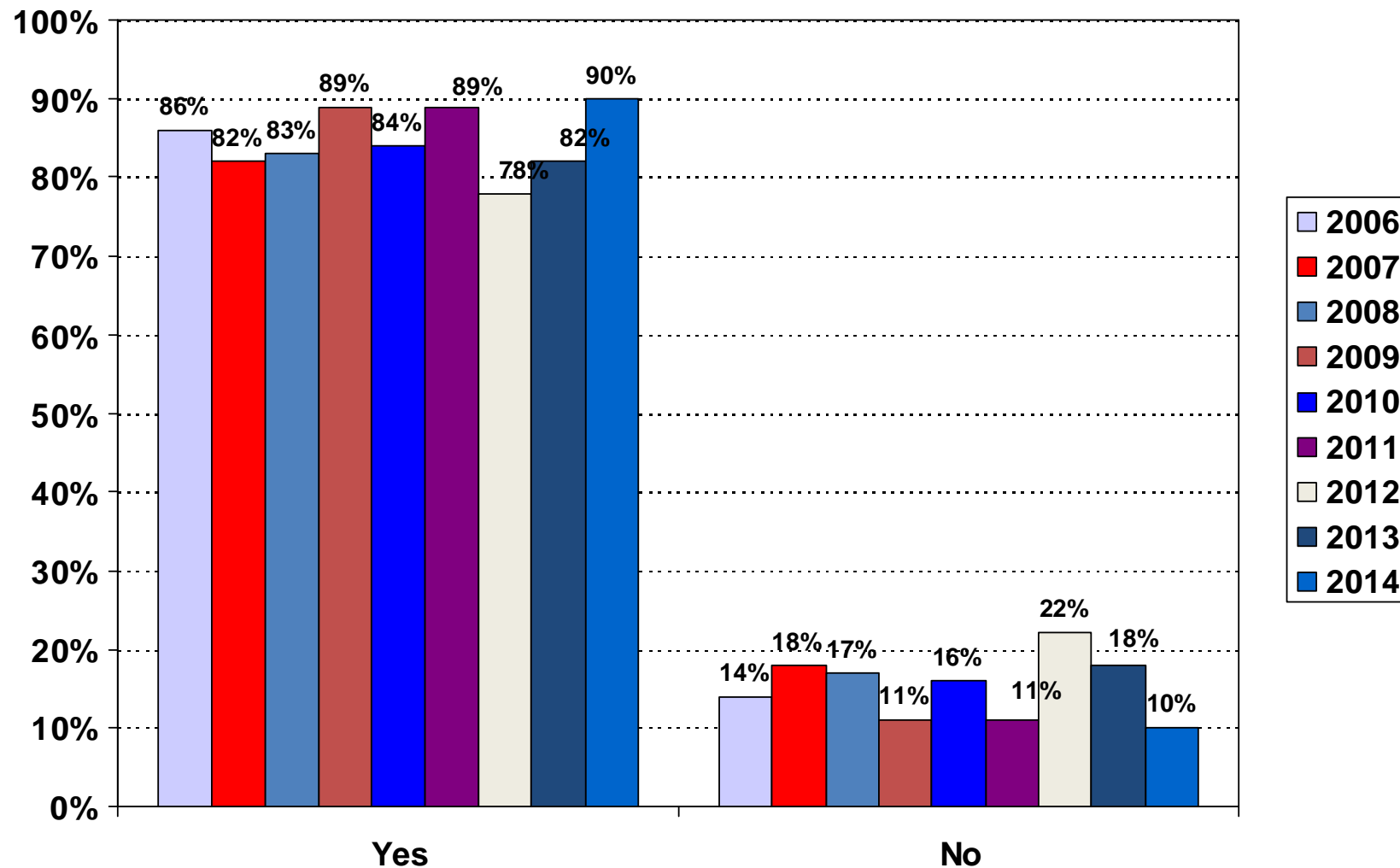
Attend again?



Most of the respondents (90%) indicated that they would like to attend the event again. This indicated that the event is popular and well organised with those who participate. There was no statistically significant difference when comparing 2013 with 2014.



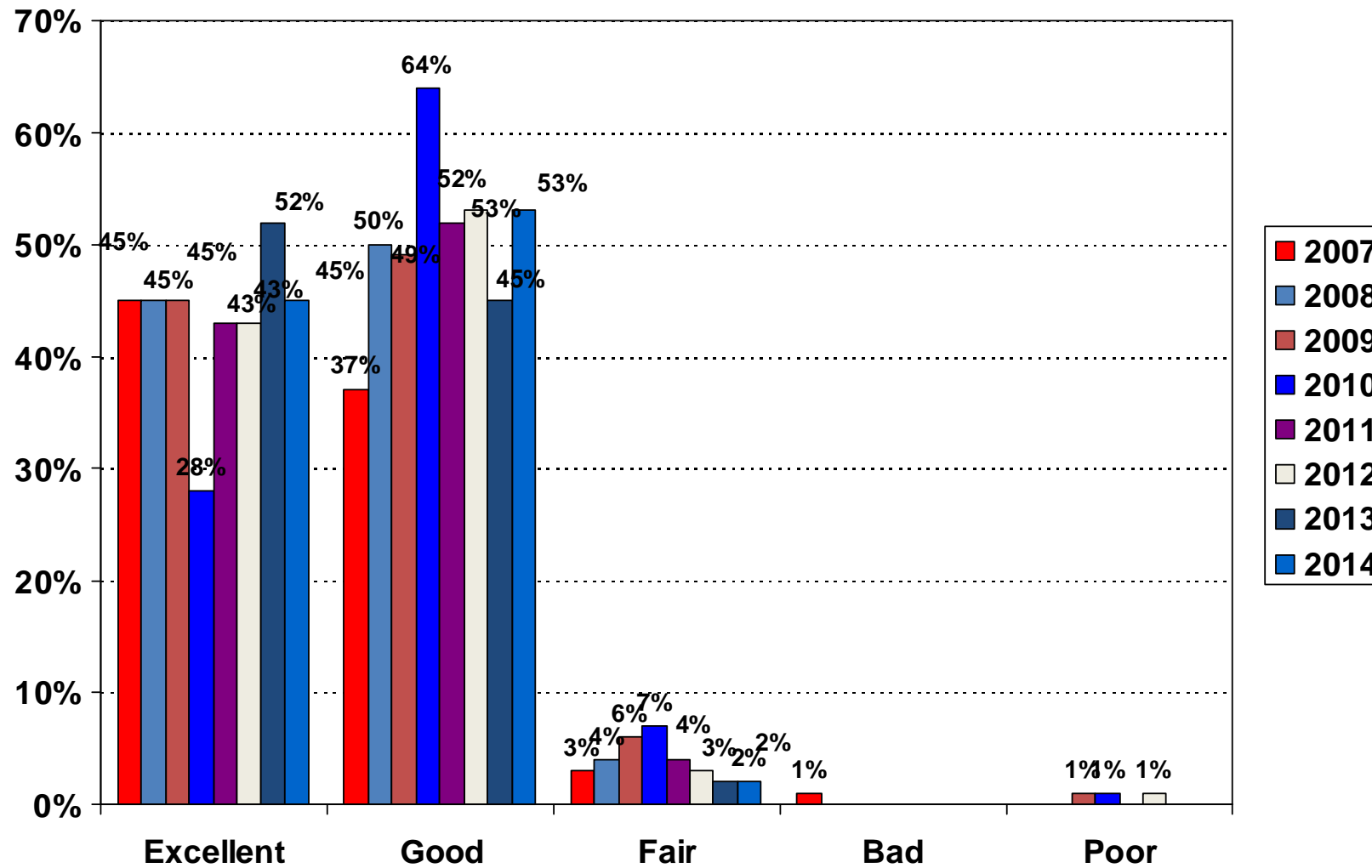
Attend in previous years?



A Z-test revealed statistically significant difference in previous attendance when comparing 2013 and 2014. This may indicate a reduction in the number of new entrants.



Experience?



Experience? (cont'd)

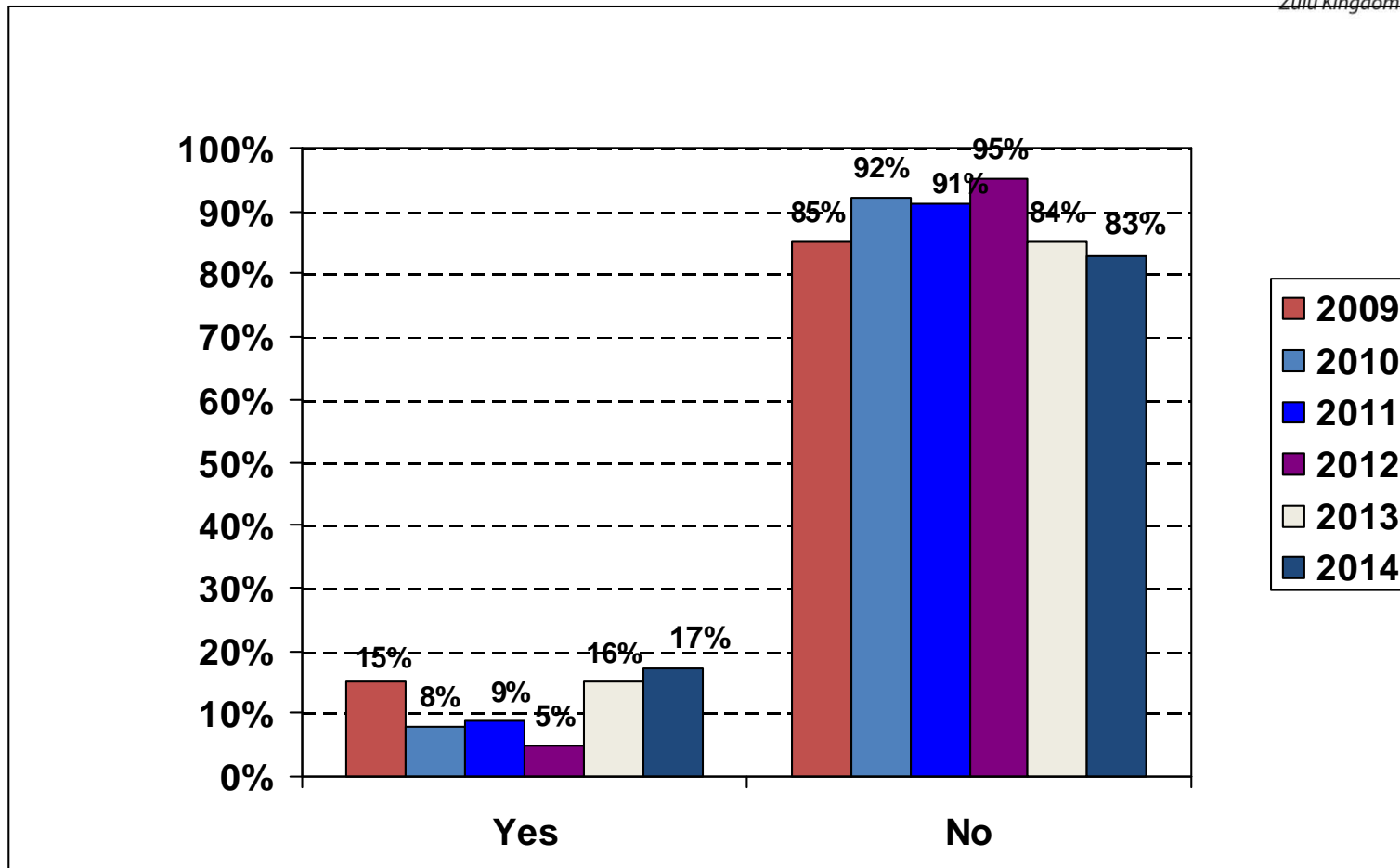


Z- Test Analysis

- There was no statistically significant difference between 2013 and 2014 for either the *excellent* or *good* rating.



Experienced problems?



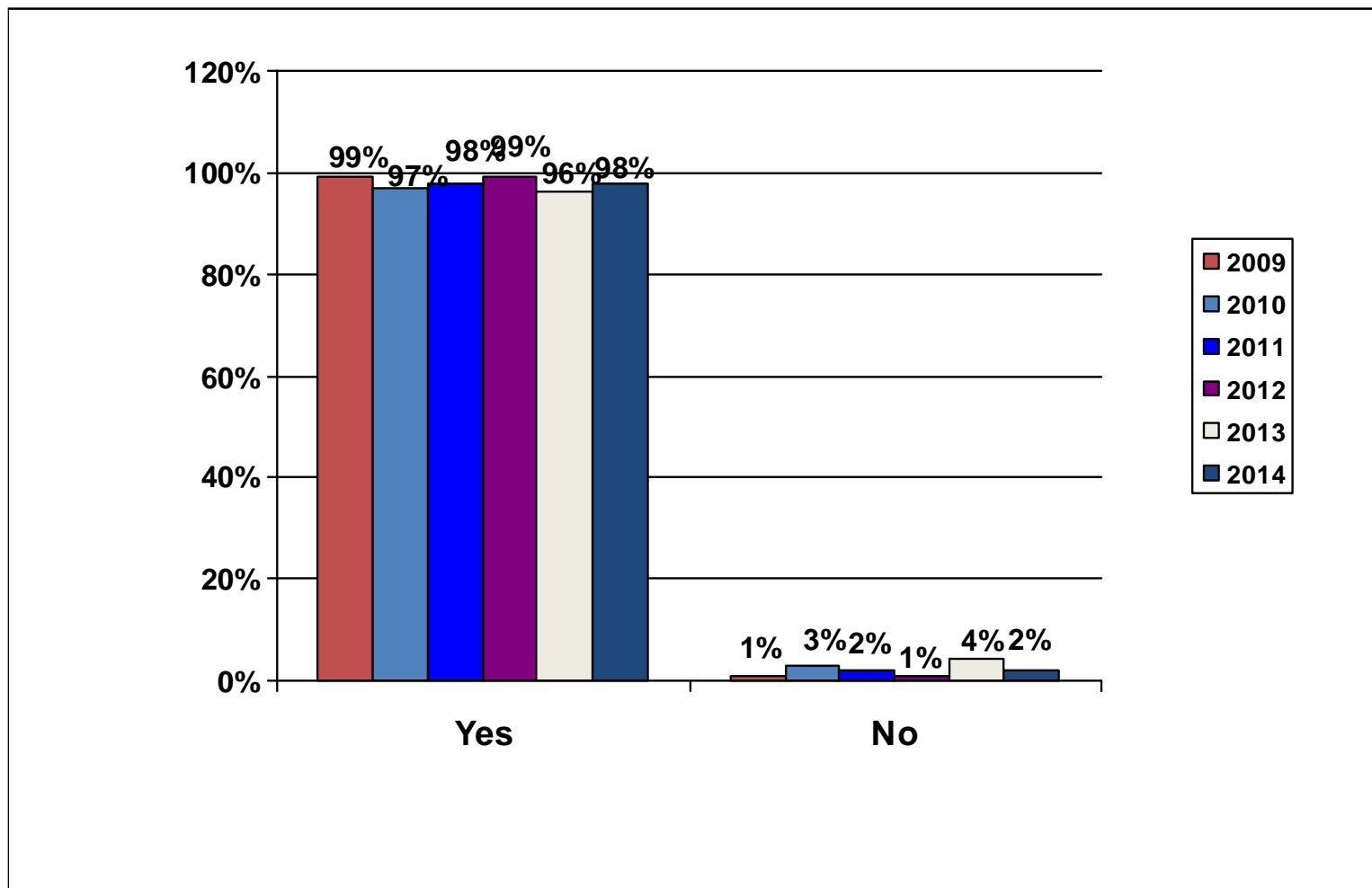
Problems that were experienced were related to the following:

Parking

A Z-test revealed a statistical decrease in the number for respondents who did not experience problems



Recommendation of the event to family and friends



Most respondents (98%) indicated that they would recommend the Dusi to their friends and relatives. There has been no statistically significant change when comparing 2013 and 2014. This indicates that people have enjoyed the experience of being at the event and also that the event is well organized, to the extent that almost all would recommend it to their family and friends.



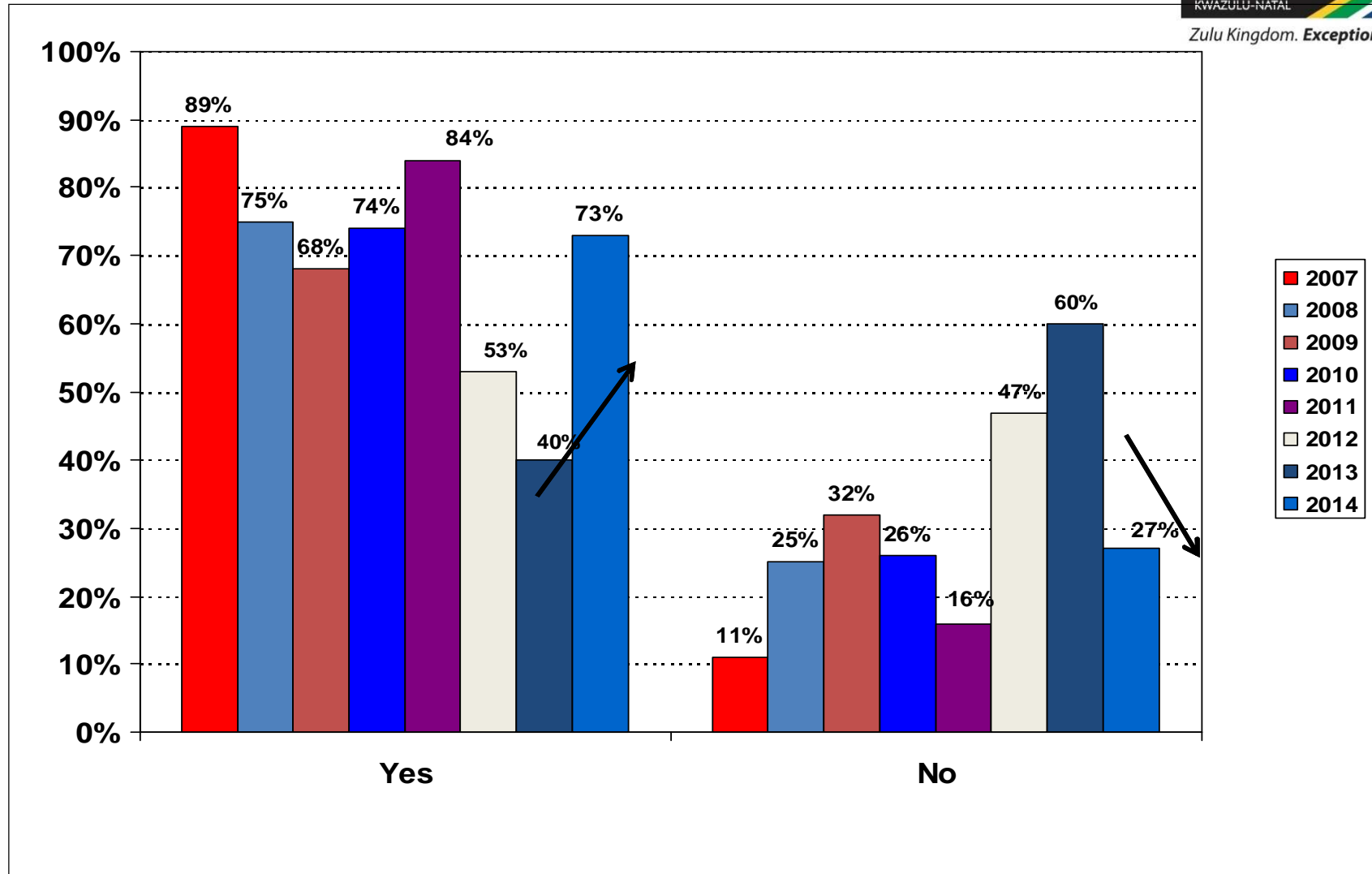
Plan to visit KZN in the next twelve months for a holiday



| Variable | 2013 | 2014 |
|----------|------|------|
| Yes | 83% | 57% |
| No | 17% | 43% |



Familiar with TKZN slogan?



The Z-Test of two independent sample proportions suggested that there was a statistically significant difference between the proportion of respondents who were familiar with the Zulu Kingdom slogan when comparing 2013 and 2014. This indicated that there was an increase in the number of respondents who were familiar with the TKZN slogan.

Familiar with TKZN slogan? (cont'd)



Z-test Analysis

- The Z-Test of two independent sample proportions suggested that there was a statistically significant difference between the proportion of respondents who were familiar with the Zulu Kingdom slogan when comparing 2013 and 2014.



Associations – TKZN slogan: Core Mentions



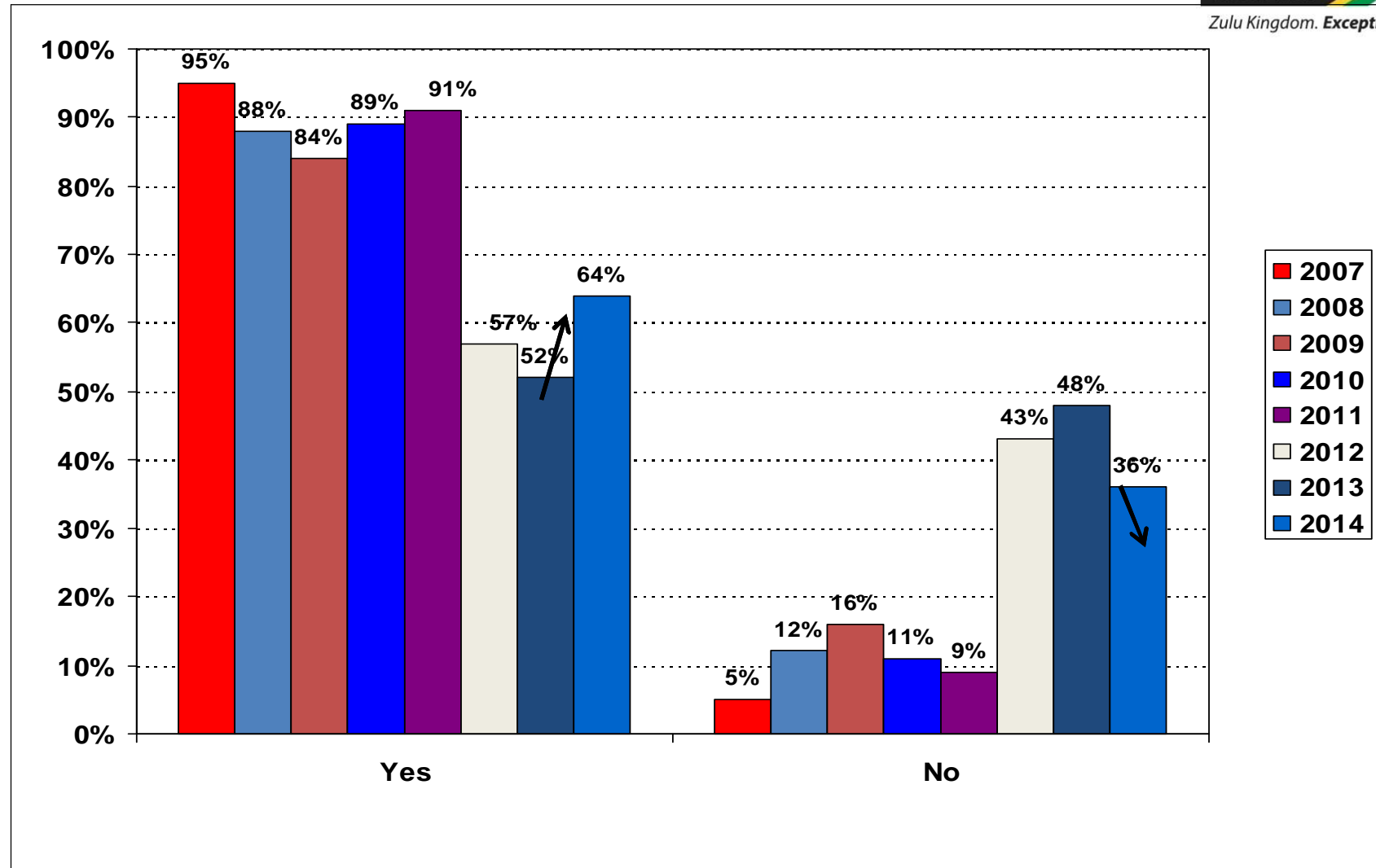
| Association | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---|------|------|------|------|------|------|
| Tourism Holidays | 35 | 8 | 11 | - | 18 | 6 |
| Zulu Heritage, Culture, King Shaka, Zulu people | 28 | 27 | 48 | 38 | 26 | 81 |
| TKZN, tourism organisation | 9 | 10 | 1 | - | 1 | 3 |
| Culture | 9 | 7 | 7 | 2 | - | 12 |
| KwaZulu-Natal | 8 | 14 | 16 | 30 | 23 | 22 |
| Nature | 3 | - | - | - | 1 | 1 |
| Don't know | - | 18 | - | 5 | 9 | 3 |
| Marketing | - | 4 | - | 2 | 1 | 1 |
| Heritage | - | - | 3 | 2 | 5 | 6 |
| Durban | - | - | - | 5 | 1 | |
| Exceptional/Striving | - | - | - | 5 | - | |
| Friendliness | - | - | - | 3 | - | |
| Game Reserves | - | - | - | 2 | - | 1 |
| Good Service | - | - | - | 2 | - | |
| People from KwaZulu-Natal | - | - | - | 2 | - | 5 |
| Vibrant place | - | - | - | 2 | - | |
| Other | 9 | 13 | 14 | 2 | 14 | 17 |



Noted TKZN logo?



Zulu Kingdom. Exceptional



Comparing 2013 and 2014, a z-test suggested that there was no statistically significant difference in the proportion of respondents who had noted the Zulu Kingdom logo. However, it seems as though there has been an increase in the recognition of the logo.



Noted TKZN logo? (cont'd)



Z-Test Analysis

- Comparing 2013 and 2014, the test suggested that there was no statistical significant difference in the proportion of respondents who had noted the Zulu Kingdom logo. However it seems as though there is a decrease in the recognition of the logo.



Where TKZN logo noted?

| | 2007 | 2008 | 2009 |
|----------------------------|------------|------------|------------|
| Billboards/posters/banners | 7% | 21% | 21% |
| Brochures | 7% | 5% | 5% |
| Magazines | 3% | 5% | 4% |
| Newspapers | 12% | 4% | 1% |
| Clothing/Merchandise | 5% | 9% | 13% |
| uShaka Marine World | 5% | 9% | 15% |
| Tourism Information Office | 7% | 4% | 5% |
| Internet | 2% | 7% | 10% |
| TV | 14% | 17% | 9% |
| Durban | 6% | 1% | - |
| Airport | 2% | 7% | 10% |
| Events | - | 3% | 1% |
| Various advertisements | - | 1% | - |
| PMB | - | - | - |
| Sibaya Casino | - | - | - |
| Not sure | - | - | - |
| Other | 30% | 6% | 5% |



Where TKZN logo noted?



| | 2010 | 2011 | 2012 | 2013 | 2014 |
|----------------------------|------|------|------|------|------|
| Billboards/posters/banners | 12% | 11% | 16% | 11% | 5% |
| Brochures | 14% | 10% | 7% | 6% | 4% |
| Magazines | 7% | 8% | 7% | 8% | 3% |
| Newspapers | 6% | 2% | 4% | 1% | 2% |
| Clothing/Merchandise | 5% | 3% | 3% | 4% | 4% |
| uShaka Marine World | 9% | 15% | 4% | 4% | 6% |
| Tourism Information Office | 7% | 4% | 4% | 6% | 3% |
| Internet | 8% | 4% | 8% | 3% | 8% |
| TV | 5% | 2% | 5% | 13% | 4% |
| Other | 1% | 14% | - | 15% | 9% |
| Durban | 5% | 1% | 1% | 8% | 9% |
| Airport | 4% | 13% | 3% | 5% | 18% |



Where TKZN logo noted? (Cont'd)



| | 2010 | 2011 | 2012 | 2013 | 2014 |
|------------------------|------|------|------|------|------|
| Events | 4% | 14% | 5% | 1% | 5% |
| Various advertisements | 3% | - | 1% | 3% | 2% |
| PMB | 2% | - | 3% | - | - |
| Sibaya Casino | 4% | - | 1% | - | 2% |
| Not sure | 4% | - | 1% | 7% | 3% |
| Canoe Marathon | - | - | 18% | 3% | 5% |
| KwaZulu-Natal | - | - | 1% | - | 2% |
| Work | - | - | 1% | - | - |
| Rugby Game | - | - | 1% | - | 0 |
| Tourism Indaba | - | - | 1% | 1% | 1% |
| Trade and investment | - | - | 1% | - | - |
| Campus | - | - | 1% | - | - |
| Midmar Mile | - | - | - | 2% | 1% |
| Beach | | | | | 2% |

Where TKZN logo noted? (Cont'd)

Top 5 places where the logo is noted



| 2013 | 2014 |
|----------------------------|---------------------|
| Billboards/posters/banners | Airport |
| uShaka Marine World | Durban |
| TV | Internet |
| Events | uShaka Marine World |
| Brochures | Dusi |



Top Suggested Improvements



| Suggestions | 2014 |
|---|------|
| Communication with metro police for parking | 25 |
| More marquees to provide shade | 16 |
| More signage for seconders | 5 |
| Live TV coverage | 4 |
| Improve the awareness of the event by providing information to spectators | 4 |
| Improve the route for seconders/dedicated entrance and exit into valley | 3 |



Future Visits to KZN



| | 2013 | 2014 |
|-----|------|------|
| Yes | 83% | 57% |
| No | 17% | 43% |

When respondents were asked if they planned visit KZN for a holiday in the next twelve months, 57% indicated that they would compared to 83% in 2013. This indicated that less respondents would return before the next Dusi for a holiday in KZN.



Main Findings



- Most of the respondents were local residents. There was significant decrease in the proportion of respondents who were day visitors.
- The majority (54%) of respondents who were interviewed were male.
- Most (77%) of the respondents indicated that they earned more than R10 000 per month. There was a significant increase the proportion of respondents who earned between R20 001 and R30 000 per month.
- The largest proportion of respondents indicated that there were professionals (22%), followed by self-employed (18%).
- As expected most of the respondents were from KZN (88%) followed by Gauteng (8%). About 46 international participants entered the event. This equates to about 3% of the total. There are no 2013 international figures to compare to. However the number of international participants is encouraging in terms of exposure of the event internationally.
- In 2014, a large proportion of non-resident respondents (33%) stayed with friends and relatives (VFR), 12% camped while 24% stayed in B&B establishments. There was an increase in the proportion of respondents who stayed in B&Bs and a decrease in the proportion who stayed with VFR and camped, however, when compared to 2013. This may be
- The average length of stay was 4 nights. The proportion of visitors who stayed more than 4 nights and 3 nights in 2014 remained similar to 2013. However, there was a decline in those that stayed for 4 nights. There was an increase those staying 1 and 3 nights. Thus more respondents are staying for shorter periods than previously. This is reflected in the decrease in the average accommodation spend. This can also impact negatively on the spend in the local economy.



Conclusion/Main Findings



- Word-of-mouth (30%) and previous attendance/participation (58%) were still the dominant factors which influenced respondents to attend the event. The event appears to continue to attract only those people involved in or knowing someone already involved in the sport or event.
- Approximately 92% of the respondents used private vehicles to travel to the event. The nature of the event requires people to travel along the route therefore a private vehicle is the most convenient.
- About 90% of respondents indicated they would attend the event again. 90% had attended the event previously. This suggests that the event is successful in maintaining its supporters. However, it is important that the event attracts more new participants and spectators in order to grow the event.
- Respondents had positive experiences as 98% of them indicated they either had a *good* or an *excellent* experience at the event. This shows that the event is well organized and enjoyable.
- 83% of respondents did not experience any problems at the event. Problems that were experienced by 17% of respondents had been in relation to parking.
- 73% of the respondents indicated that they recognized the TKZN slogan. This was a significant increase when compared to 2013 (52%).
- 98% of the respondents indicated that they would recommend this event to their friends and family. This indicated that the event was well managed and popular with the respondents.



Conclusion/Main Findings



- However, most respondents continued to associate the slogan with Zulu history/kings/heritage/culture, rather than with KZN and with tourism/holidays. These were the dominant associations. Campaigns need to be run to link the Zulu Kingdom, slogan with holidays and tourism.
- 64% of respondents had noted the logo. A Z-test showed no significant difference in the noting when comparing 2013 (52%) and 2014.
- The main areas where the respondents noted the logo were:
 - Airport (18%)
 - Durban (9%)
 - Internet (8%)



Recommendations



Although the majority of respondents were happy with the event, the following recommendations are made to further improve/increase satisfaction levels:

- It is suggested that in order to improve the organization of parking at the finish that the organizers communicate better with Metro Police.
- Respondents suggested that more marquees for shade be provided. Perhaps the organizers could approach various sponsors to provide sponsored umbrellas and gazebos at the finish that can be used by spectators.
- More signage for seconders to be provided with regards to travelling between various seconding points.
- It is suggested that the organizers have live television coverage or perhaps live internet coverage.
- In promoting the event more should be done to improve the awareness of the event and sport by providing spectators with information.
- It is suggested that the organizers provide some incentive for the back markers in the event, where they could compete against each other based on a set of criteria.

