

# The Dusi 2015: Topline Summary Report



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**April 2015**

# Methodology



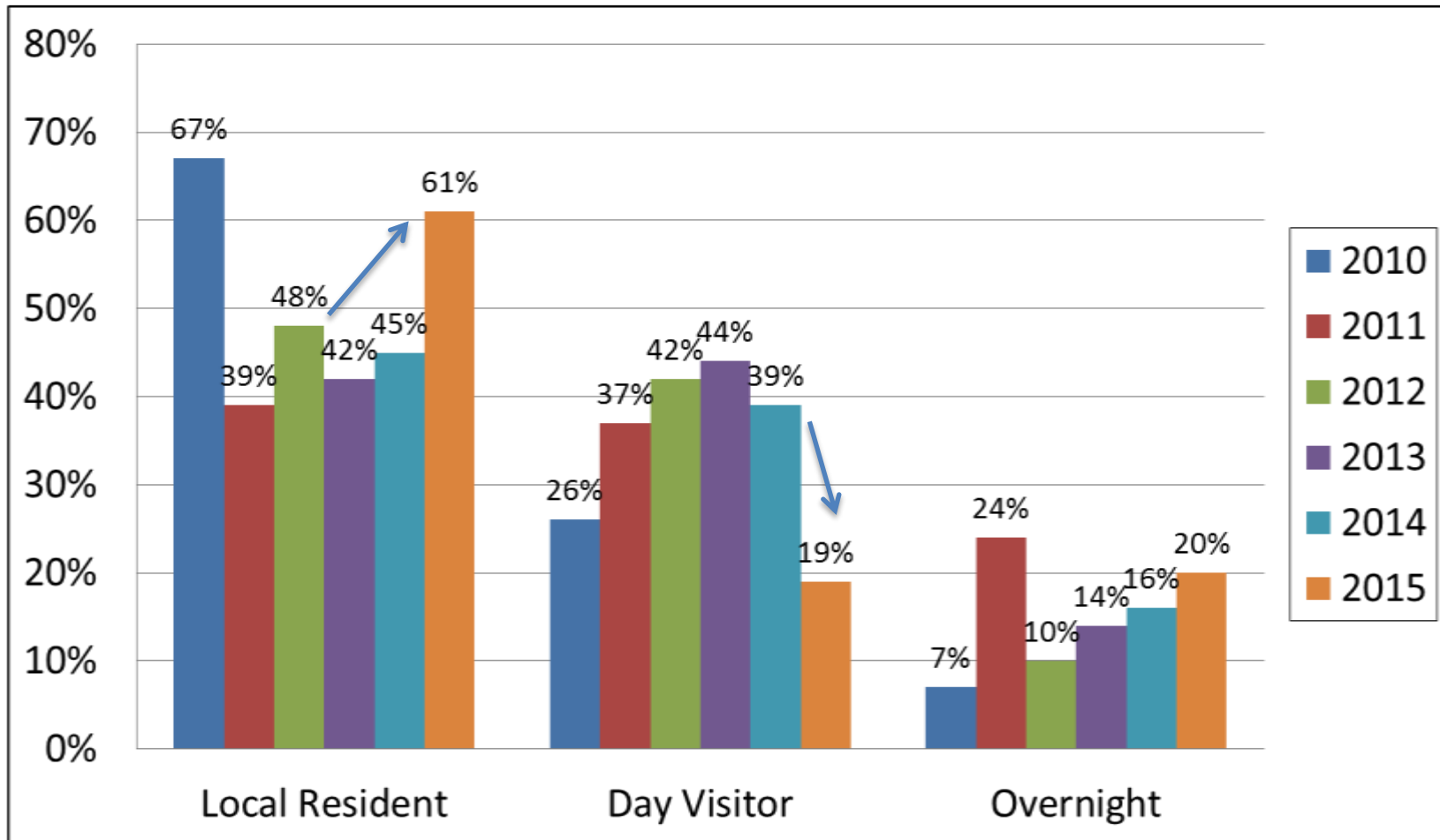
- Face to face surveys with a probability sample of 226 respondents
- Respondents were systematically selected by the hour during two days of the three day event - on Friday, 20<sup>th</sup> of February and Saturday, 21<sup>st</sup> of February 2015.

# Positive Highlights



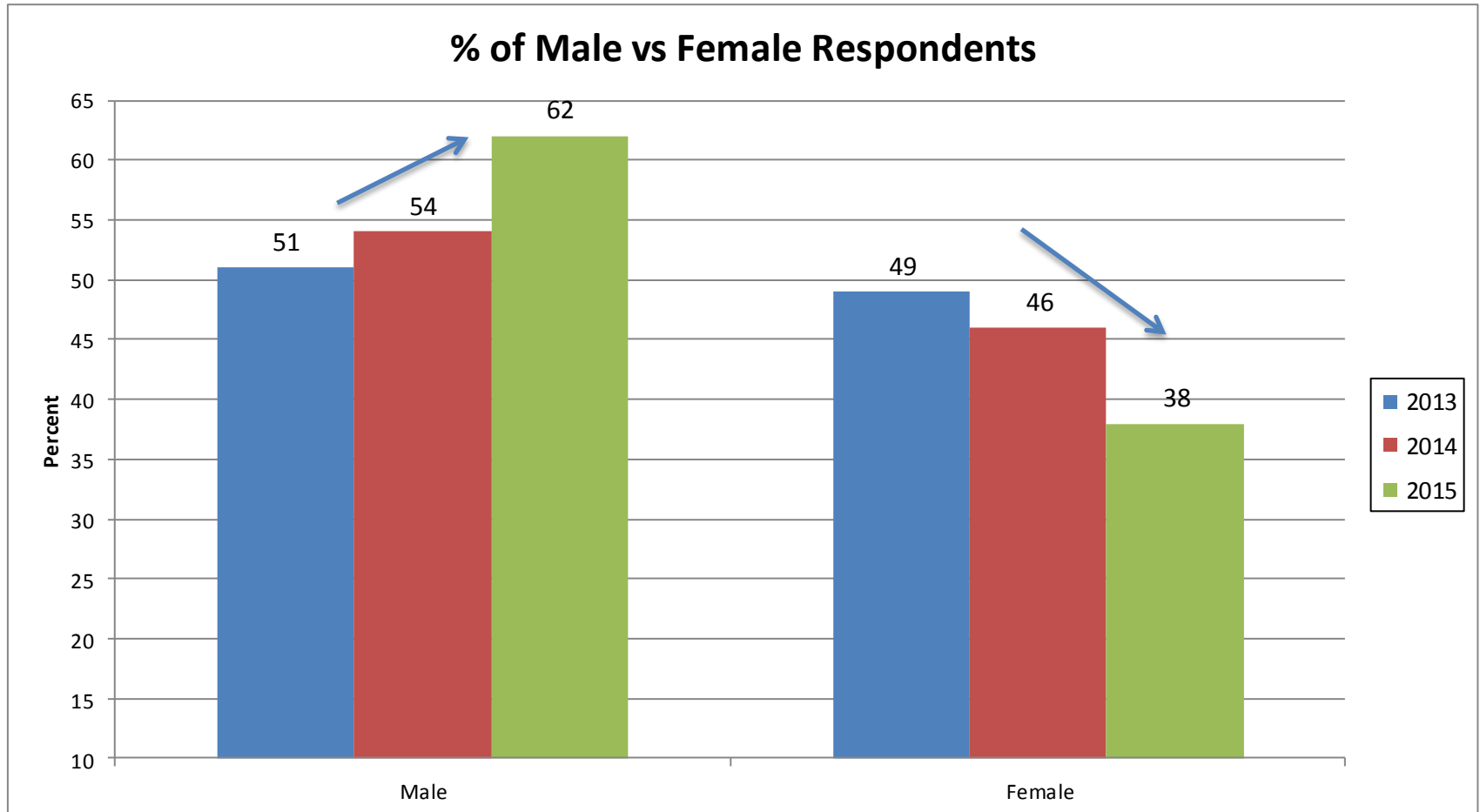
- The length of stay increased for the 4 night stay, from 14% in 2014 to 29% in 2015.
- 92% of the respondents indicated that they would attend the event again.
- 94% of the respondents had a 'good' or 'excellent' experience at the event.
- 88% of the respondents did not experience any problems at the event.
- 71% would visit KwaZulu-Natal in the next 12 months for a holiday.
- 98% indicated that they are willing to recommend the event to friends and family.
- The total average spend of all respondents has increased along with the average spend on other categories such as accommodation and transport.

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



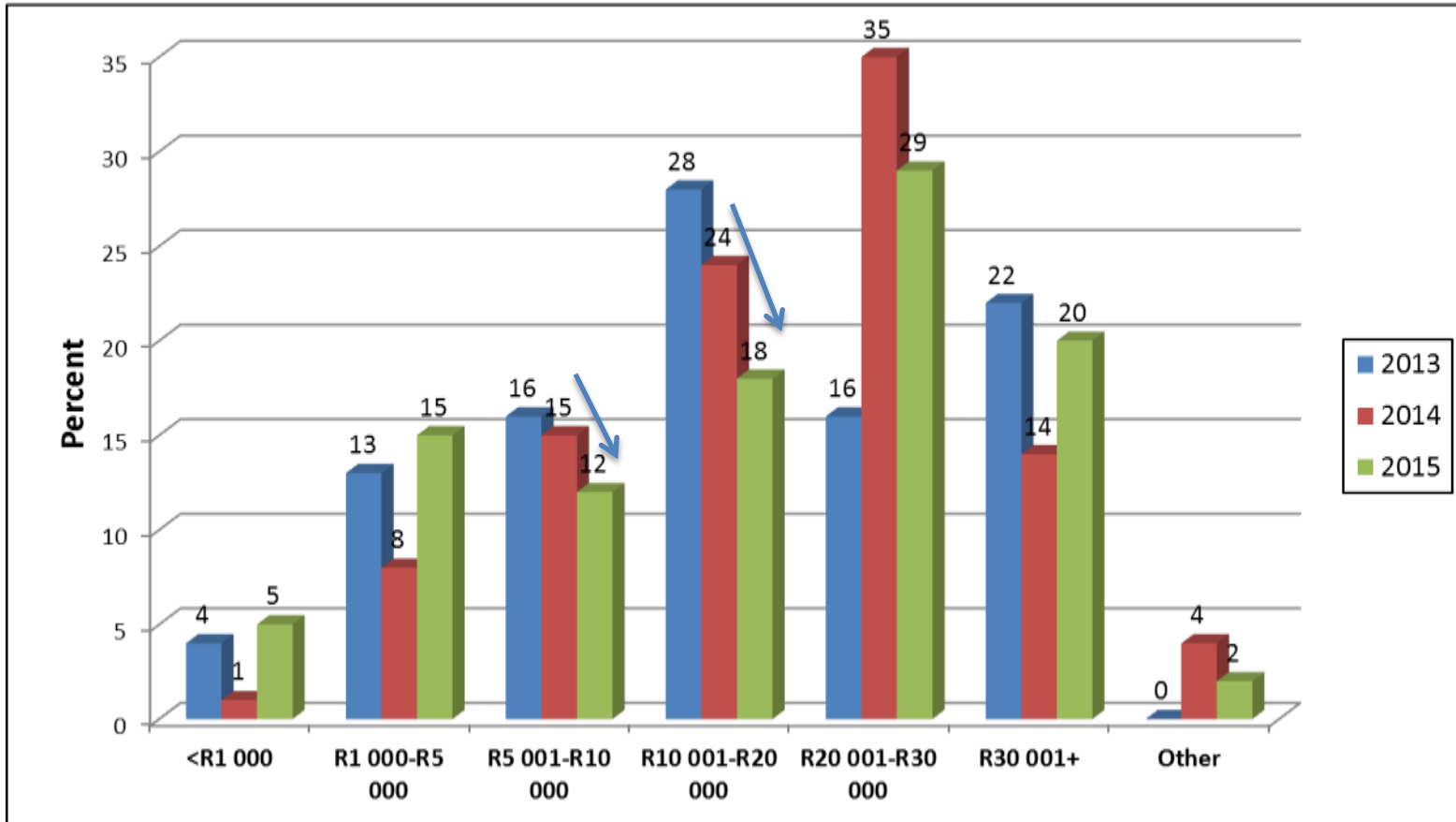
There was a significant increase in the number of local residents who attended the event along with a significant decrease in day visitors, when comparing 2014 and 2015. There was also an increase in overnight visitors, meaning more people from outside of the area(s) attended the event. The fact that the event takes place over 3 days, across a number of areas, meant that a number of the respondents stayed overnight.

# Respondent Gender



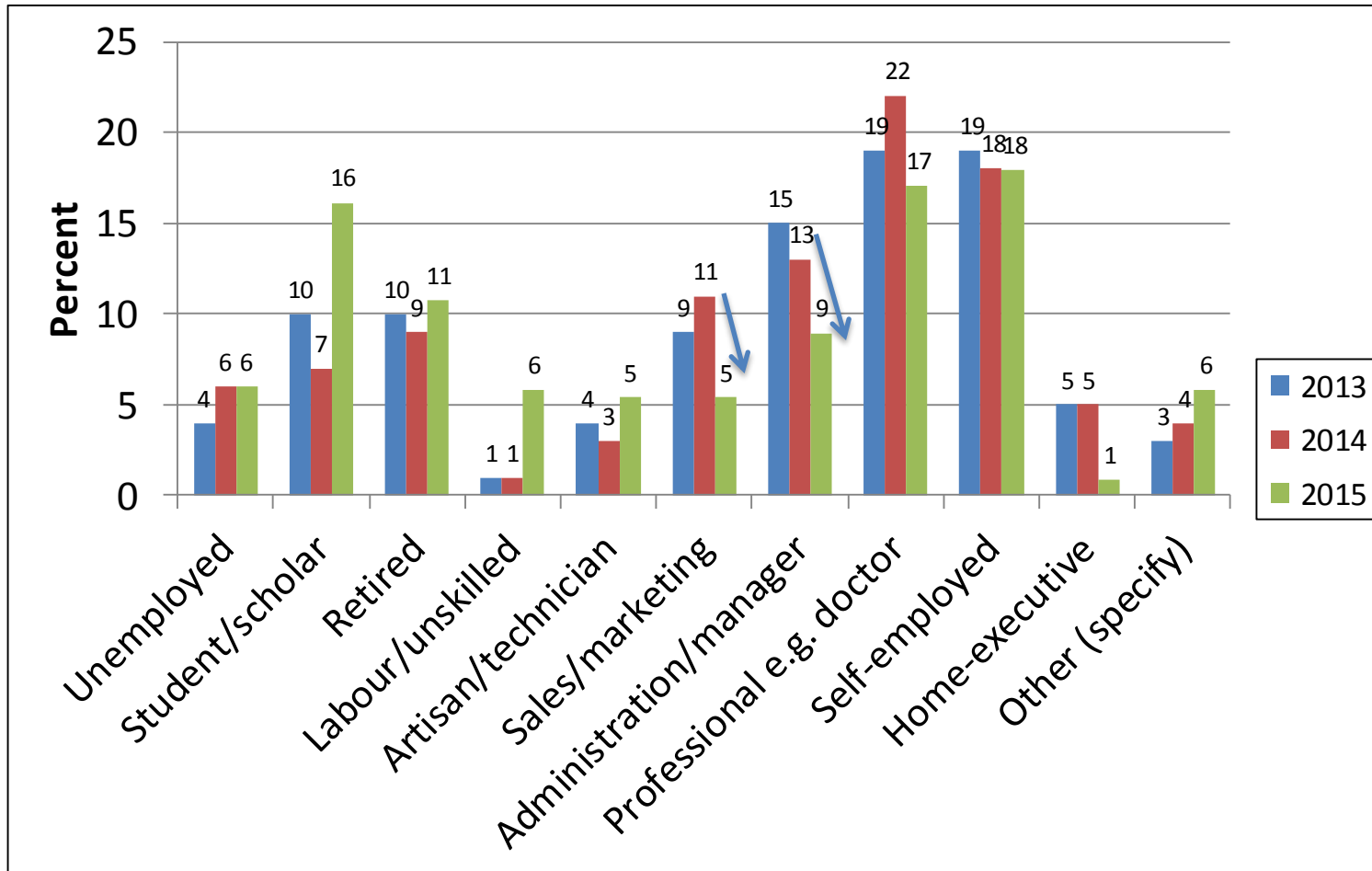
Once again, the number of male respondents outnumbered the female respondents and there has been a steady rise in this statistic from 2013 to 2015 (51% to 62% males). It is important to note that these results are based on a sample survey and not exact statistics. Nevertheless, the trend is clear.

# Respondent Income



The majority of the respondents receive an income between R20 001 and R30 000 per month. The next highest group earns 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. The respondent group who earn between R1 000 – R5 000 showed a significant increase compared with 2015, while there was also a decline in respondents earning R10 001 – R30 000.

# Respondent Occupation



This slide supports the previous slide, in that most respondents were professionals or self-employed, thus earning a relatively good income. Both of these figures indicated that this event provides positive and strong market access to high income earners with disposable income. However, the majority of the “higher paying” occupations have experienced a slight decrease, with “student/scholar” experiencing a considerable increase when compared to 2014.

# Nature of the Dusi Canoe Marathon Respondents



### South African Province of Residence



	KZN	Gauteng	W. Cape	N. Cape	E. Cape	Free State	Mpum.	Limpopo	N. West
2010	93%	4%	2%	0	1%	0	0	0	0
2011	79%	19%	1%	0	0	0	0	0	0
2012	91%	5%	3%	0	0	0	0	0	1%
2013	86%	11%	2%	0	0	1%	1%	0	0
2014	88%	8%	2%	0	1%	0	1%	0	0
2015	85%	12%	2%	0	0	0%	0%	0	0

There was no statistical difference in the proportion of respondents from KwaZulu-Natal when comparing 2014 to 2015. However, there was a slight increase in the number of respondents from Gauteng. There have been no significant changes to the proportion of respondents from other provinces. The reasons for the low number of respondents from other provinces is something that will have to be investigated.



# Nature of the Dusi Canoe Marathon Participants



<b>2014</b>	<b>KZN</b>	<b>Gauteng</b>	<b>W Cape</b>	<b>Central Districts</b>	<b>E Cape</b>	<b>International</b>
<b>Percent</b>	74%	16%	3%	1%	3%	3%
<b>Number</b>	1204	257	57	19	52	46
<b>TOTAL</b>						<b>1 635</b>

<b>2015</b>	<b>KZN</b>	<b>Gauteng</b>	<b>W Cape</b>	<b>Central Districts</b>	<b>E Cape</b>	<b>International</b>
<b>Percent</b>	76%	15%	5%	1%	1%	2%
<b>Number</b>	1080	205	64	10	17	28
<b>TOTAL</b>						<b>1 404</b>

# Estimated Mean Spend per Category



	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
Accommodation	R1 642	R2 843	R1 983	R1 729	R3 566
Transport	R733	R716	R757	R664	R907
Food and Beverage	R389	R420	R397	R564	R609
Entertainment	R346	R244	R492	R730	R557
Souvenirs	R268	R458	R282	R490	R607
Average Total Spend	R1 031	R1 542	R1 274	R1 776	R2 199

The above table indicated that there has been a significant increase in the mean spend for accommodation. This may be due to the increase in respondents from Gauteng as well as the fact that the race takes place over three days so more people stayed overnight. There has also been an increase in transportation costs and this may be due to the increased rates of petrol and toll fees. However, there was a decrease in entertainment spending. This may be because of the increased spend on other items such as accommodation. The average total spend has seen an increase every year since 2011. This has 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		2015	
	No.	Mean	No.	Mean	No.	Mean	No.	Mean	No.	Mean	No.	Mean
Participants	1 800	R1 193	1 741	R1 321	1 679	R2 564	1 564	R1 694	1 635	R2 189	1 404	R1 968
Spectators: local residents	3 685	R500	1 313	R255	1 680	R 469	2 520	R437	3 060	R662	2 647	R739
Spectators: day visitors	1 430	R790	1 750	R524	1 470	R1 184	2 640	R718	2 160	R1 323	825	R988
Spectators: overnight visitors	385	R2 964	438	R3 035	600	R4 916	840	R4 874	840	R6 453	868	R4 407

The mean spend across all categories has NOT experienced any major changes when comparing 2014 and 2015. There has been a slight decrease in the mean spend across all of the categories apart from the local spectators. The reasons for this slight decrease could be attributed to the decrease in the numbers of both participants and spectators. However, there is no clear reason for the decreased mean spend across certain categories.

# Estimated Economic Impact (cont'd)



		2010	2011	2012	2013	2014	2015
<b>Estimated Direct Impact</b>	At Least:	R1 641 956	R3 307 277	R3 113 415	R4 999 453	R8 436 420	R 5 387 988
	As much as:	R4 959 634	R6 455 964	R12 419 598	R12 461 510	R15 354 487	R 9 805 284
<b>Estimated Total Impact (multiplier of 1.42)</b>	At least:	R2 331 578	R4 696 333	R4 421 050	R7 009 223	R11 979 420	
	As much as:	R7 042 680	R9 167 469	R17 635 055	R17 695 345	R21 803 372	
<b>Estimated Total Impact (multiplier of 2.0)</b>	At least:				R9 998 906	R16 872 840	R10 775 976
	As much as:				R24 923 302	R30 708 975	R19 610 568

**Note:** international standard practice suggests that only visitor spend and not local spend should be used to determine the economic impact of an event, and local spend should be excluded. The table above thus excludes local spend. Please refer to the next slide for further analysis of the economic impact.

# Estimated Economic Impact (cont'd)



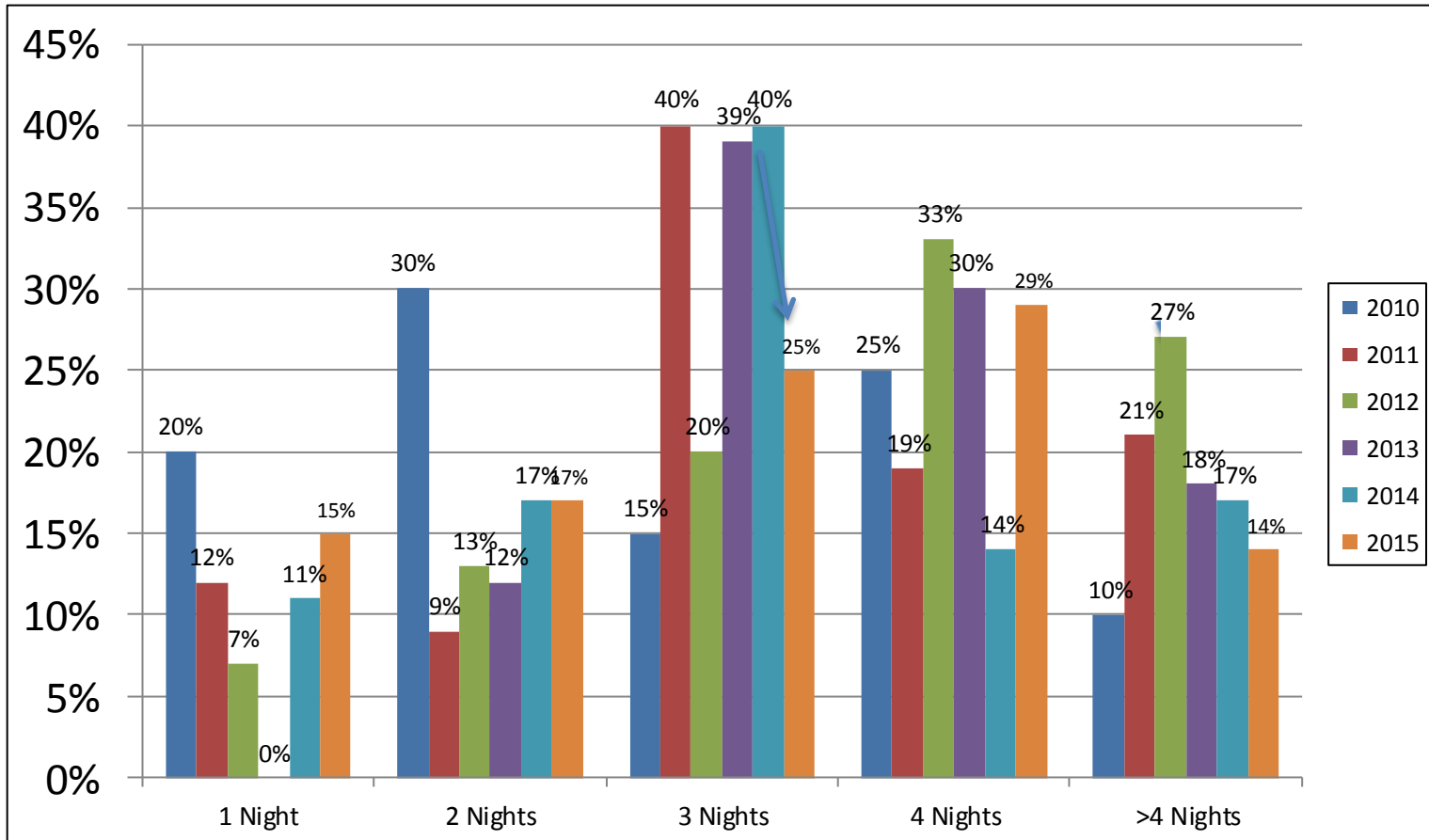
Overall Economic Impact		2015
Estimated Direct Impact	At Least:	R 15 366 715
	As much as:	R 27 964 986
Estimated Total Impact (multiplier of 2.0)	At least:	R 30 733 430
	As much as:	R 55 929 973

**Note:** the previous slide shows a significant decrease in the economic impact of the event. However, what the table shows is by no means a cause for concern as the table is based on the spend of visitors only. Furthermore, it is important to note that 61% of all respondents were local residents and are thus excluded from the estimated economic impact. The overall attendance of the event was estimated at 5 470 and the table above indicates estimated economic impact of ALL participants and spectators for 2015 (i.e. both visitors and local residents are included).

# Length of Stay

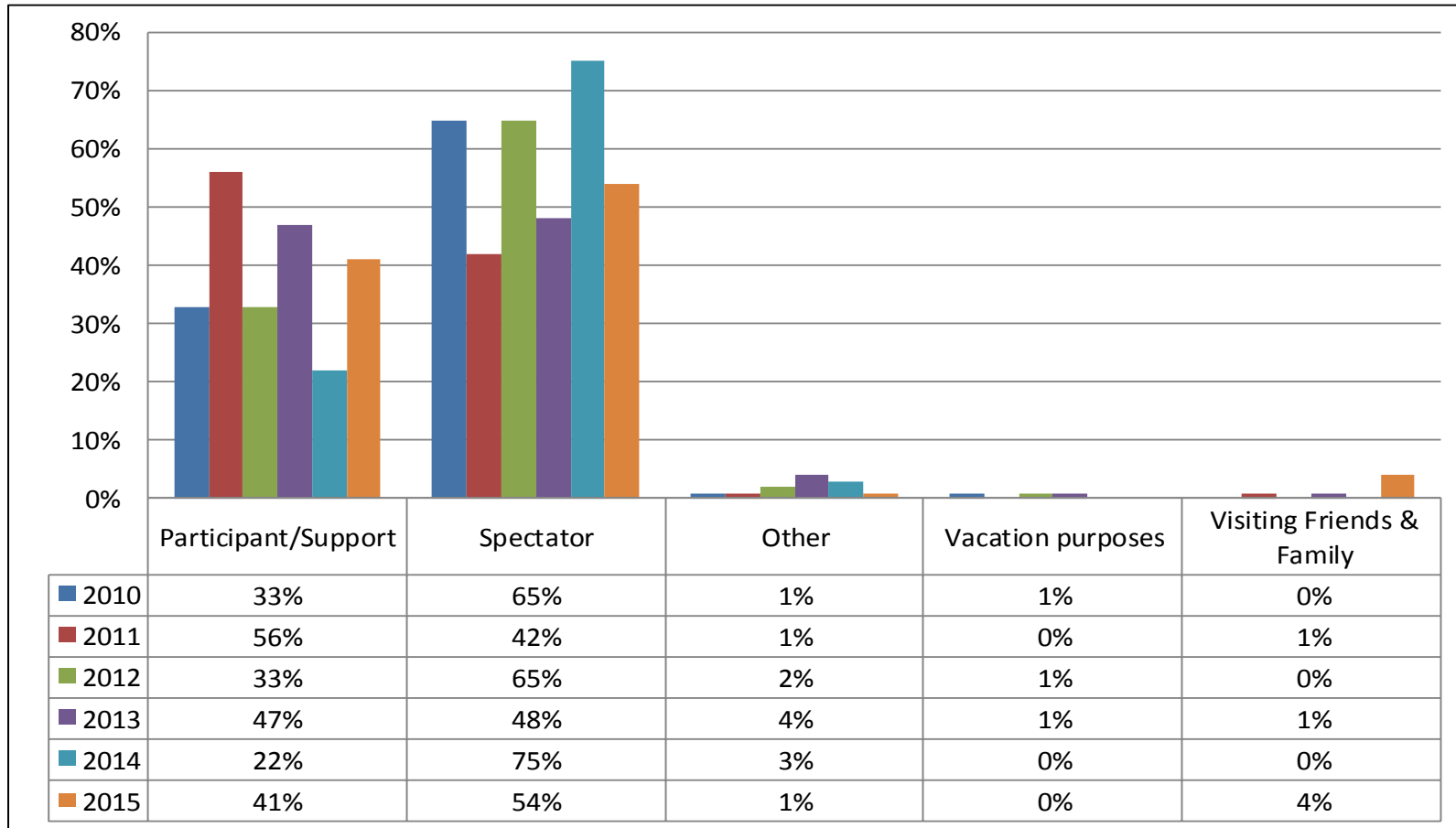


Average stay: 4 nights



There was an increase in the number of respondents who stayed 4 nights and a decrease in respondents who stayed 3 and 4+ nights. This may have affected the mean spend depicted in slide 10. There also seems to have been a major decline in respondents who stayed one night. However, this was not statistically confirmed. It can be assumed that many respondents have stayed for 4 nights as it allows them to stay for the entire event – many participants arrive the night before as the event begins early in the day.

# Primary reason for visiting area where event is taking place



Most (95%) of the respondents were at the event as either spectators or participants/crew support. There was a statistically significant difference (decrease of 21%) between the two independent sample proportions of spectators in 2014 and 2015. There was also a significant increase (21%) in the number of participants in the total number of respondents. The reasons for the majority of the respondents could be attributed to the format of the Dusi Canoe Marathon's "course". In other words, the event takes place across the river and dam systems within the inland regions of Durban and it only really takes place within populated urban areas during the start and the finish. Therefore, it would be unlikely that high numbers of people would be visiting the area of the event for other reasons.

# Accommodation: non-residents

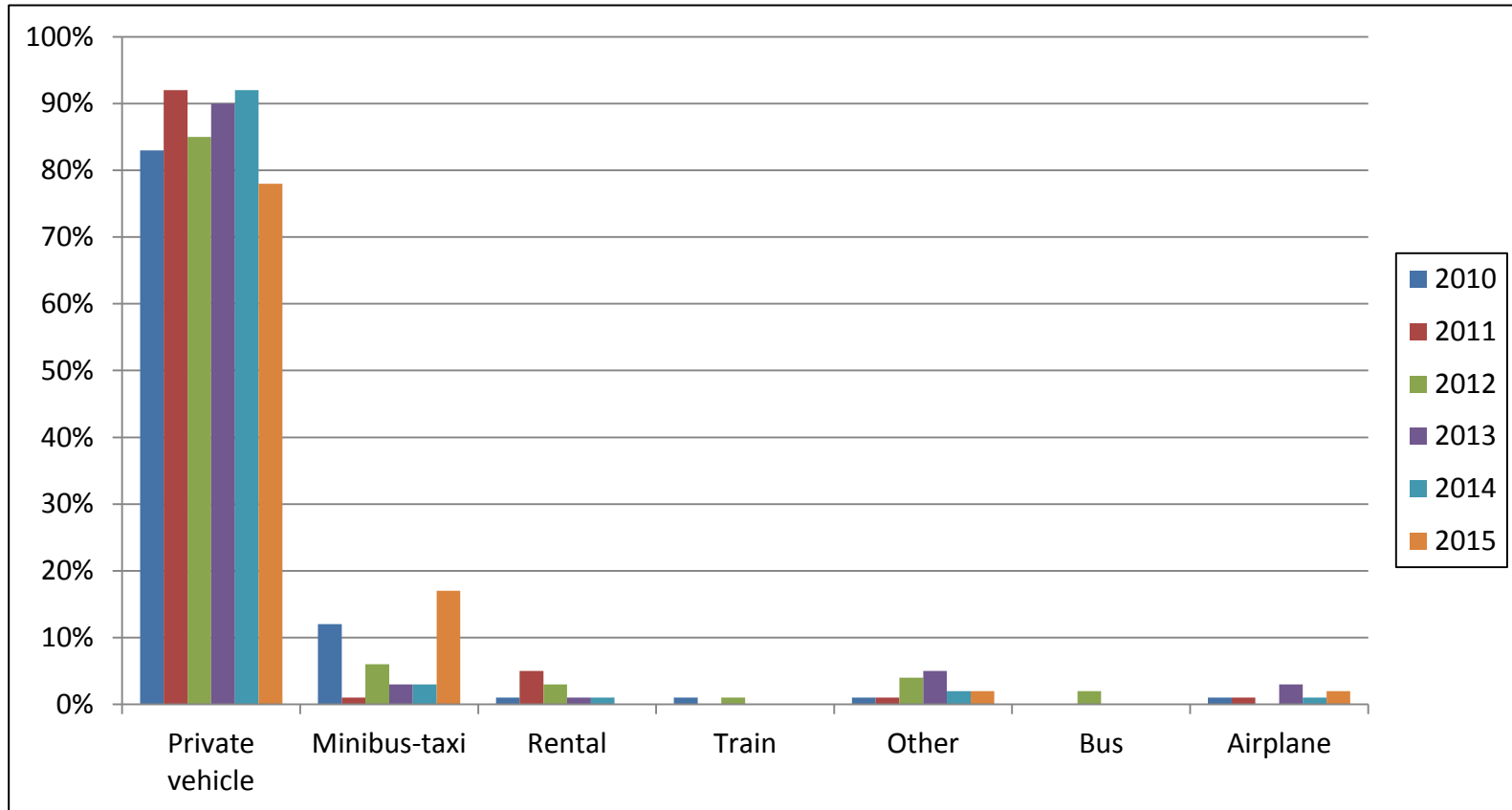


	Friends/ Relatives	Camping	B&B	Self- catering	Holiday Home	Home	Holiday Flats	Family Hotel	Luxury Hotel	Guest House	Other
<b>2010</b>	<b>56%</b>	26%	11%	-	-	-	-	4%	4%	-	-
<b>2011</b>	<b>42%</b>	13%	27%	8%	-	-	4%	2%	-	4%	-
<b>2012</b>	<b>55%</b>	18%	-	27%	-	-	-	-	-	-	-
<b>2013</b>	<b>43%</b>	23%	20%	3%	7%	-	-	3%	-	-	-
<b>2014</b>	<b>33%</b>	12%	24%	6%	3%	-	9%	6%	6%	-	-
<b>2015</b>	<b>29%</b>	23%	10%	4%	7%	-	6%	10%	6%	-	4%

Statistical analyses on the accommodation choices of non-residents 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&Bs, camping and holiday flat options were also very popular.

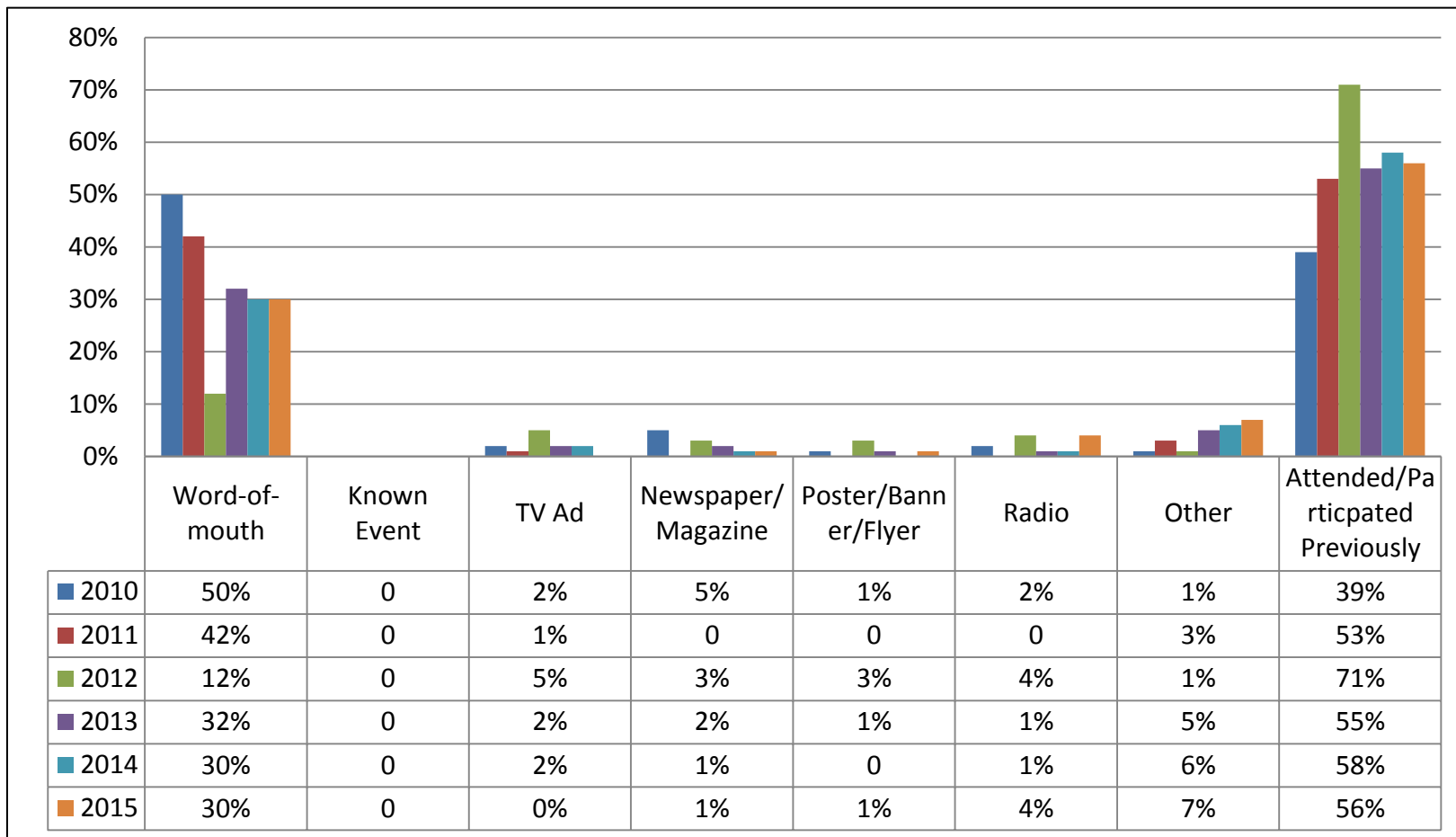


# Transport to Event: non-residents



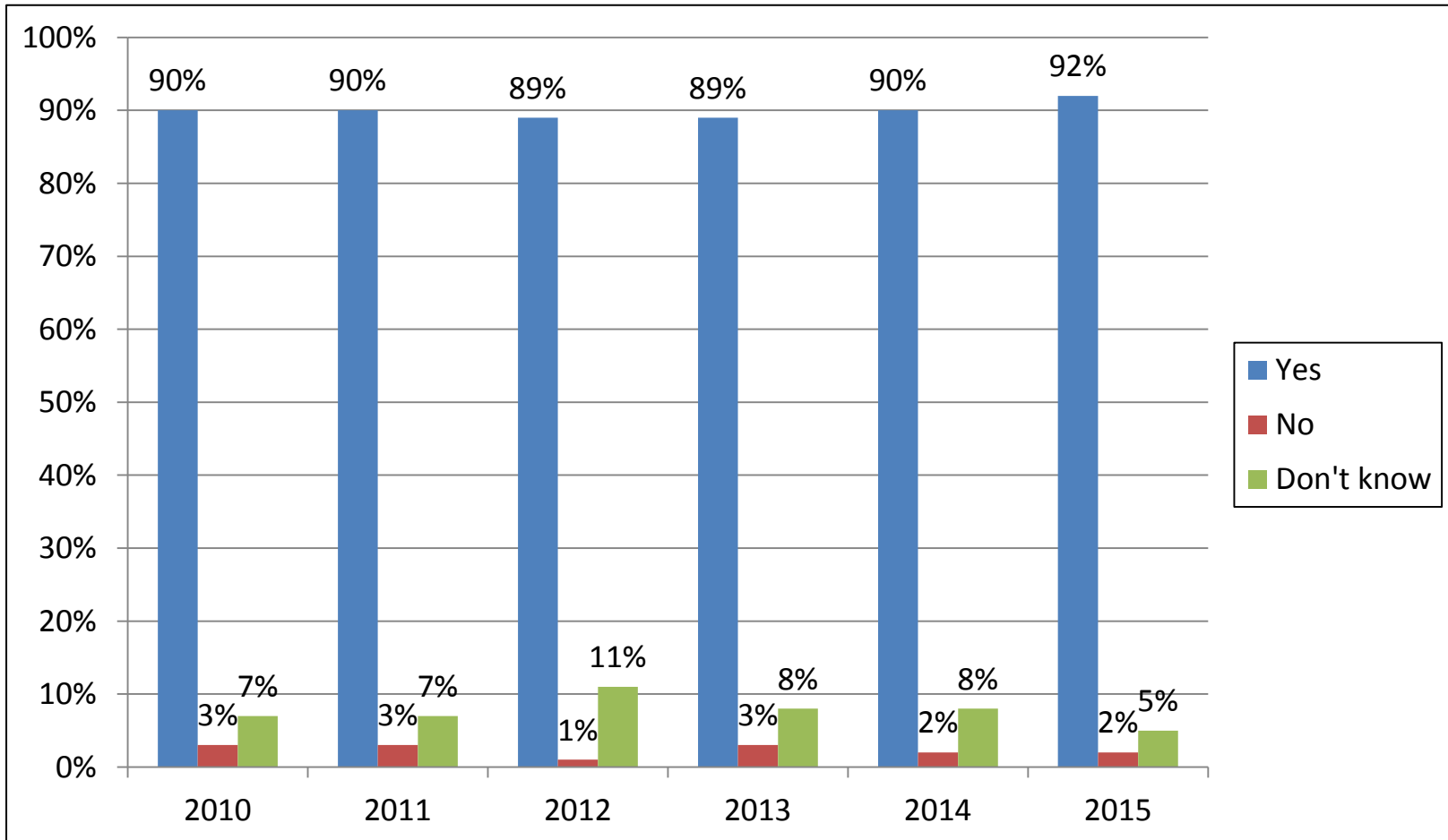
Most of the respondents travelled to the event using private vehicles as has typically been the case. However, there was a decrease in the proportion of respondents who used private vehicles while there was an increase in respondents who used a mini-bus taxi, when comparing 2014 and 2015. Respondents 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. It may be that the increase of mini-bus taxis was by spectators and not participants.

# Influenced to attend?



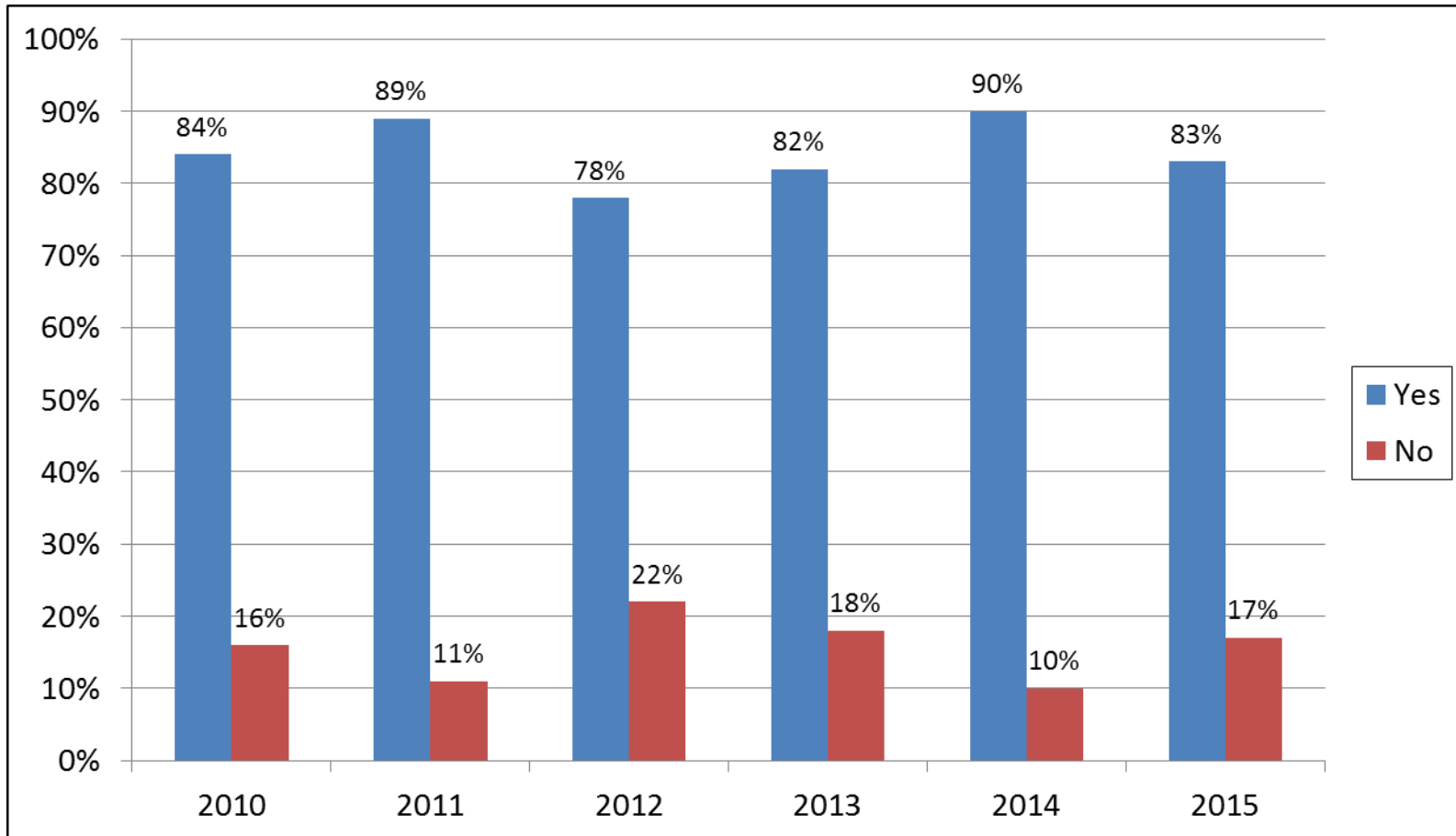
“Attended/participated previously” is the most significant factor influencing people to attend the event as has been the case previously. This was followed by “word-of-mouth”. The ‘canoeing fraternity’ is a very tight-knit group and the main influences to attend the event are not surprising as the Dusi Canoe Marathon is probably the biggest canoeing event in KZN and many of the clubs encourage their members to participate.

# Attend again?



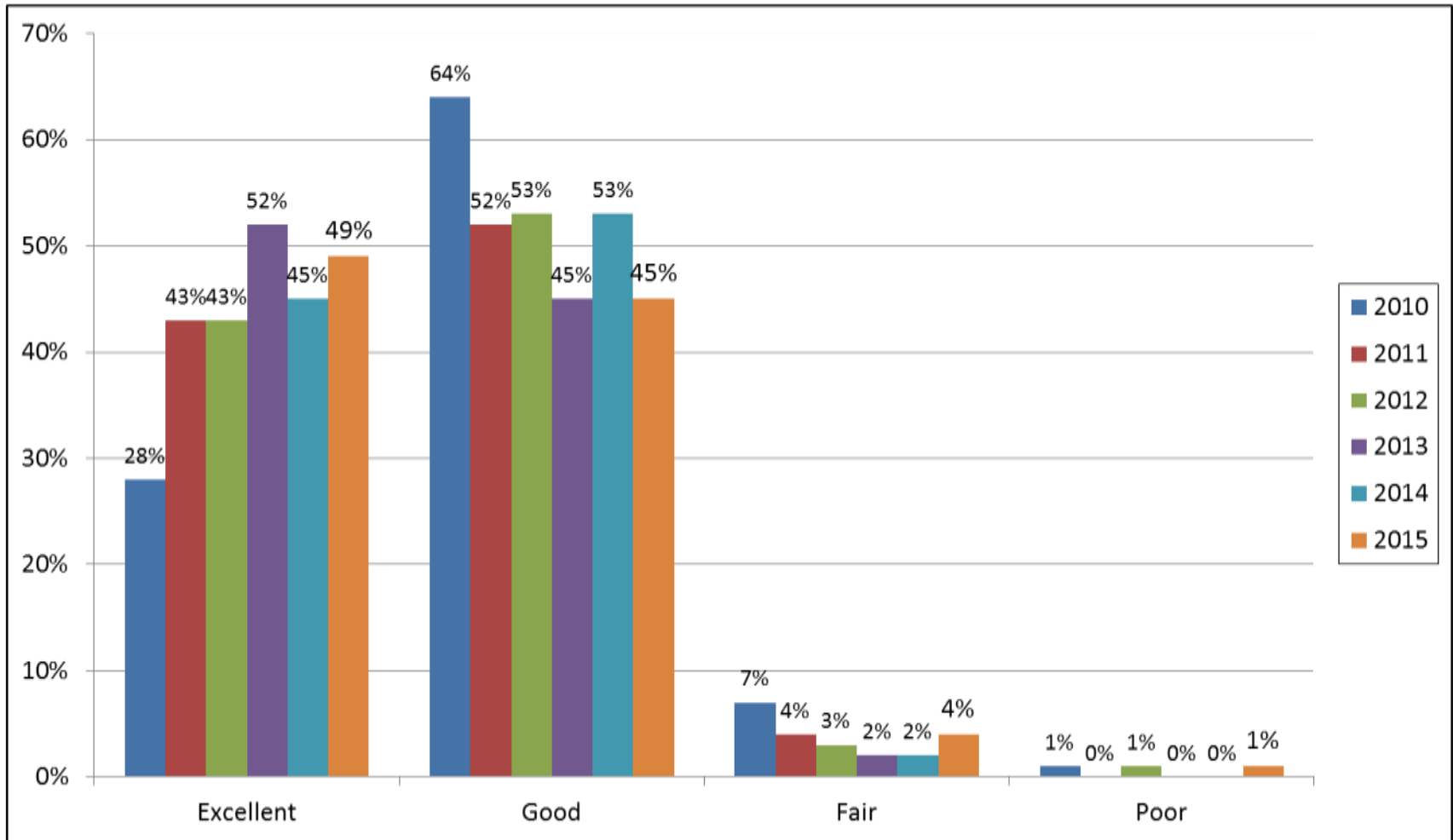
Most of the respondents (92%) indicated that they would like to attend the event again. This indicated that the event is perceived as popular and well organised by those who participate. There was no statistically significant difference when comparing 2014 with 2015.

# Attend in previous years?



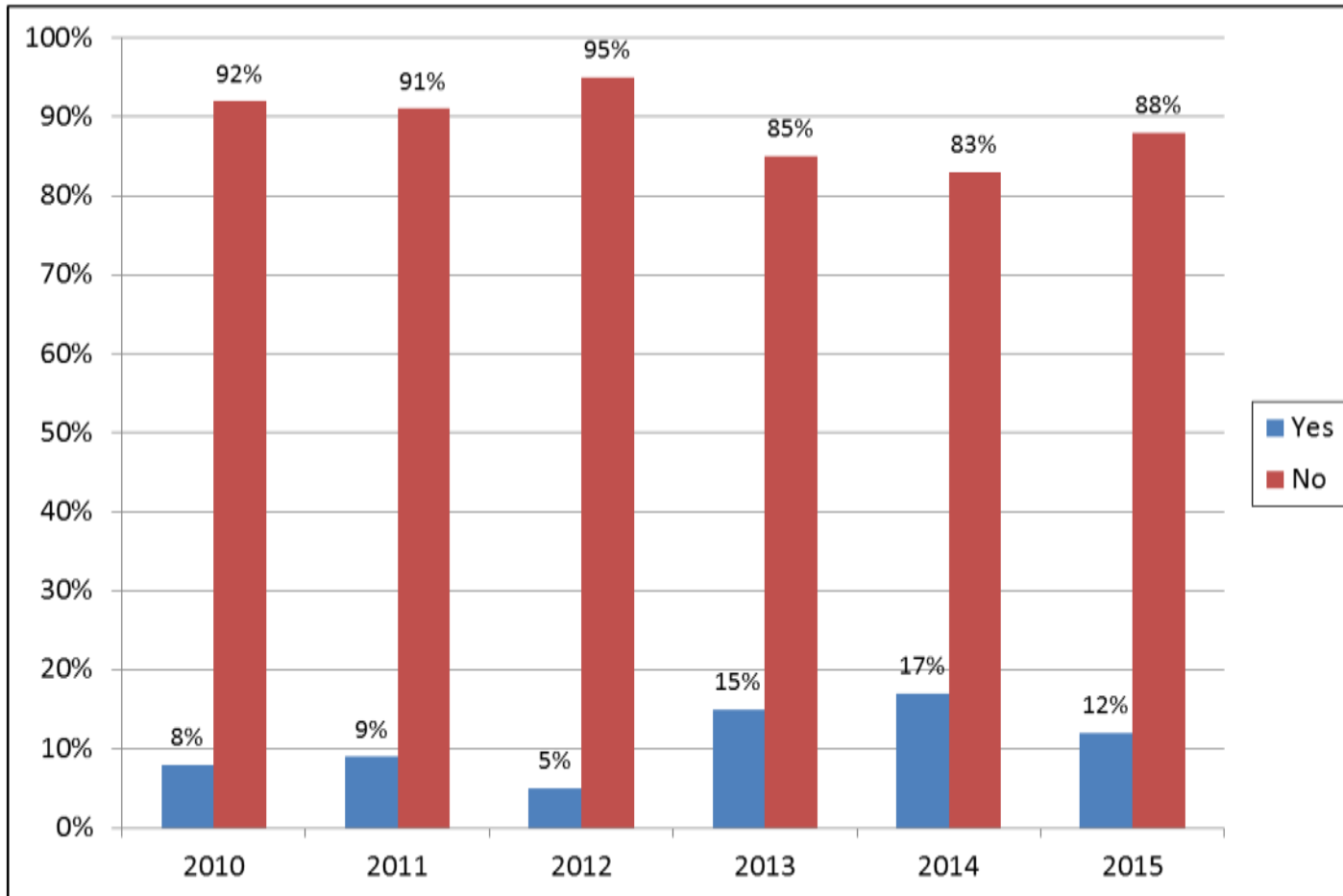
It was evident that there was a slight increase in the amount of new participants, meaning that the event is still attracting new entrants.

# Experience?



Generally, the majority of respondents had an “excellent” or “good” experience which means that the event is perceived as well managed.

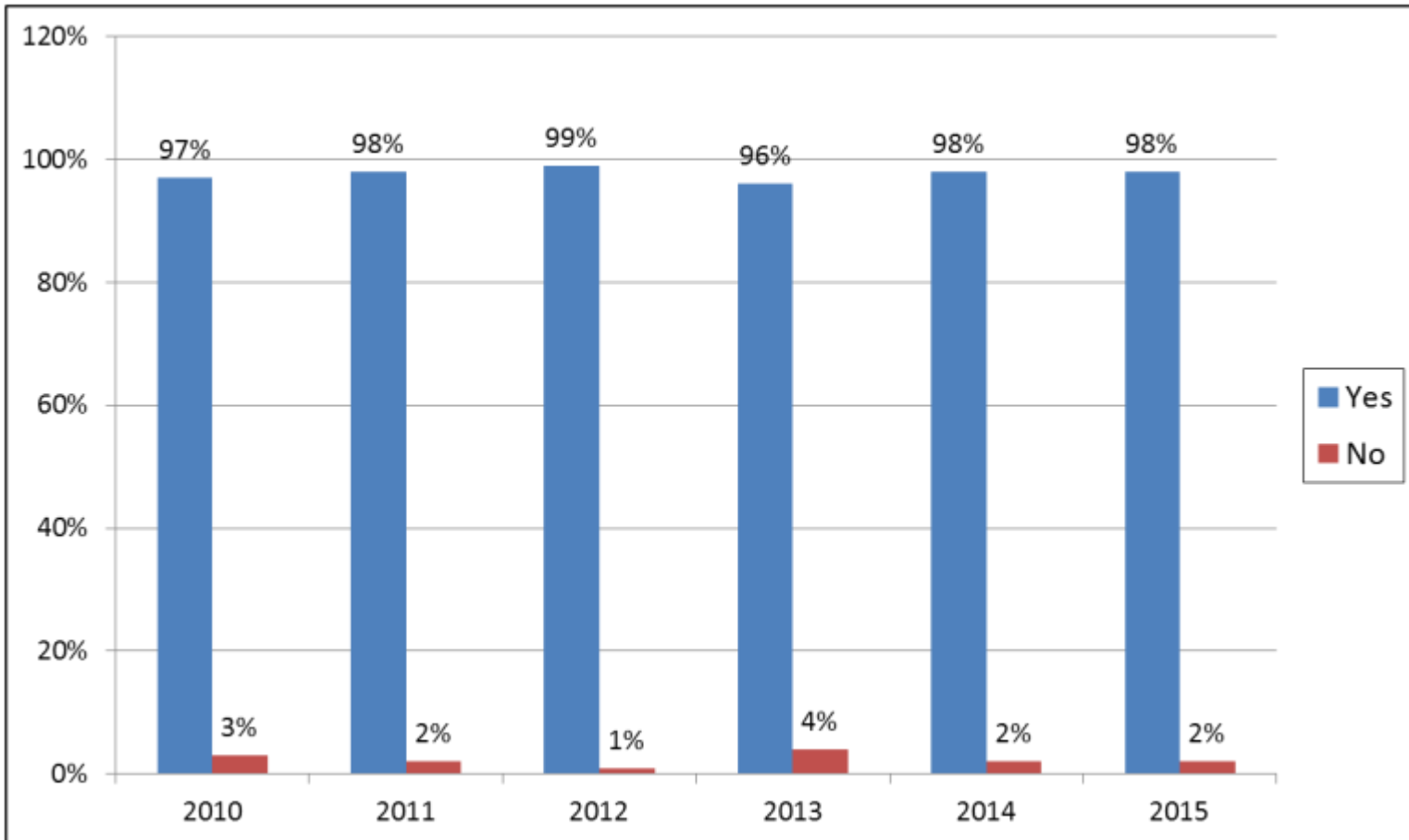
# Experienced problems?



## Problems that were experienced were related to the following:

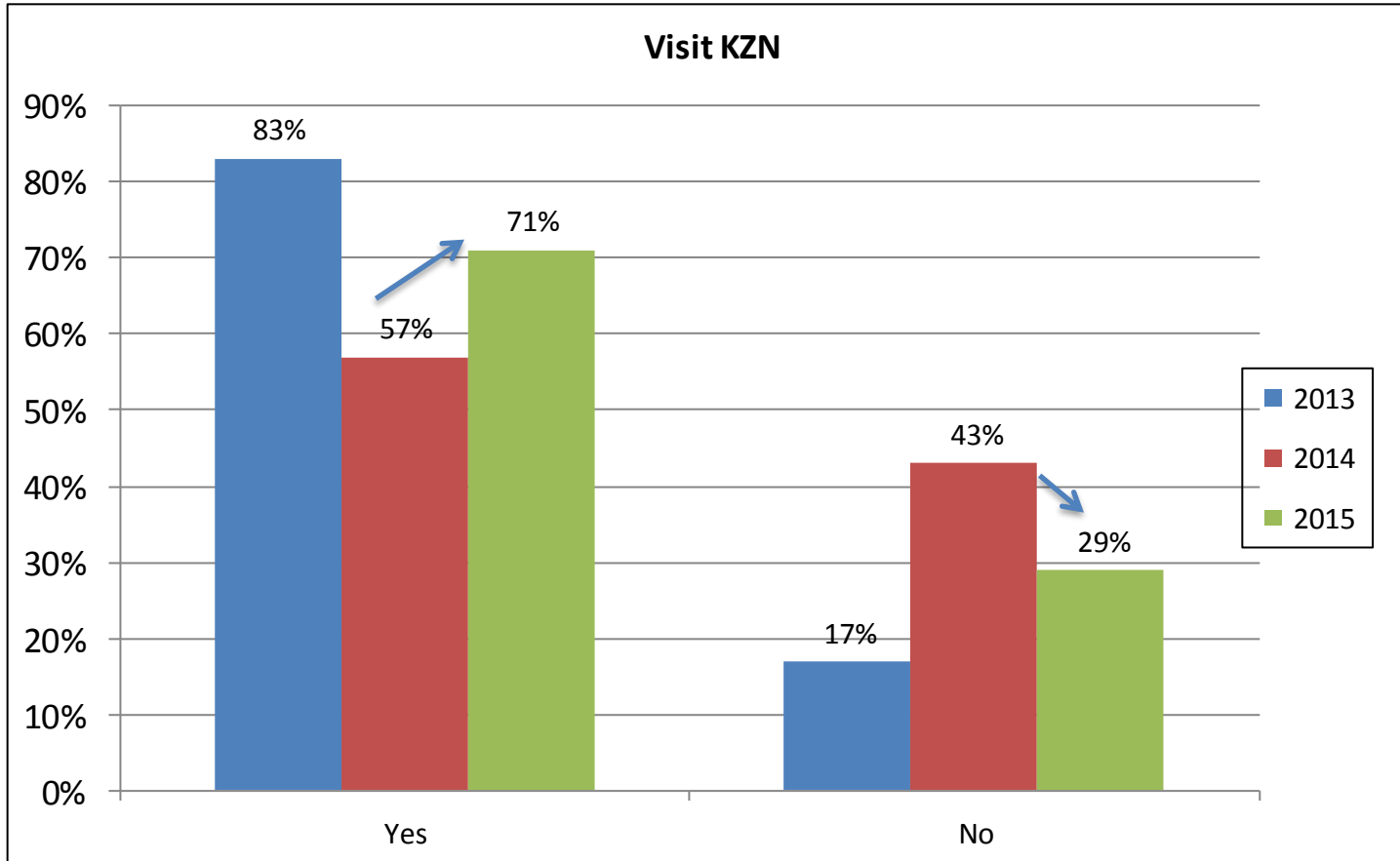
- Parking problems
- Vagrants along the route
- Not enough accommodation establishments along the route.
- Rude car guards/security guards

# Recommendation of the event to family and friends



Most respondents (98%) indicated that they would recommend the event to their friends and relatives. There has been no statistically significant change when comparing 2014 and 2015. 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



The vast majority (71%) of the respondents have stated that they will be visiting KZN in the next 12 months for a holiday. However, this number has still not reached the same level as 2013 (83%) yet it is an improvement from 2014 (57%). The respondents have listed a number of reasons for NOT planning to visit KZN in the next 12 months – see the next slide.



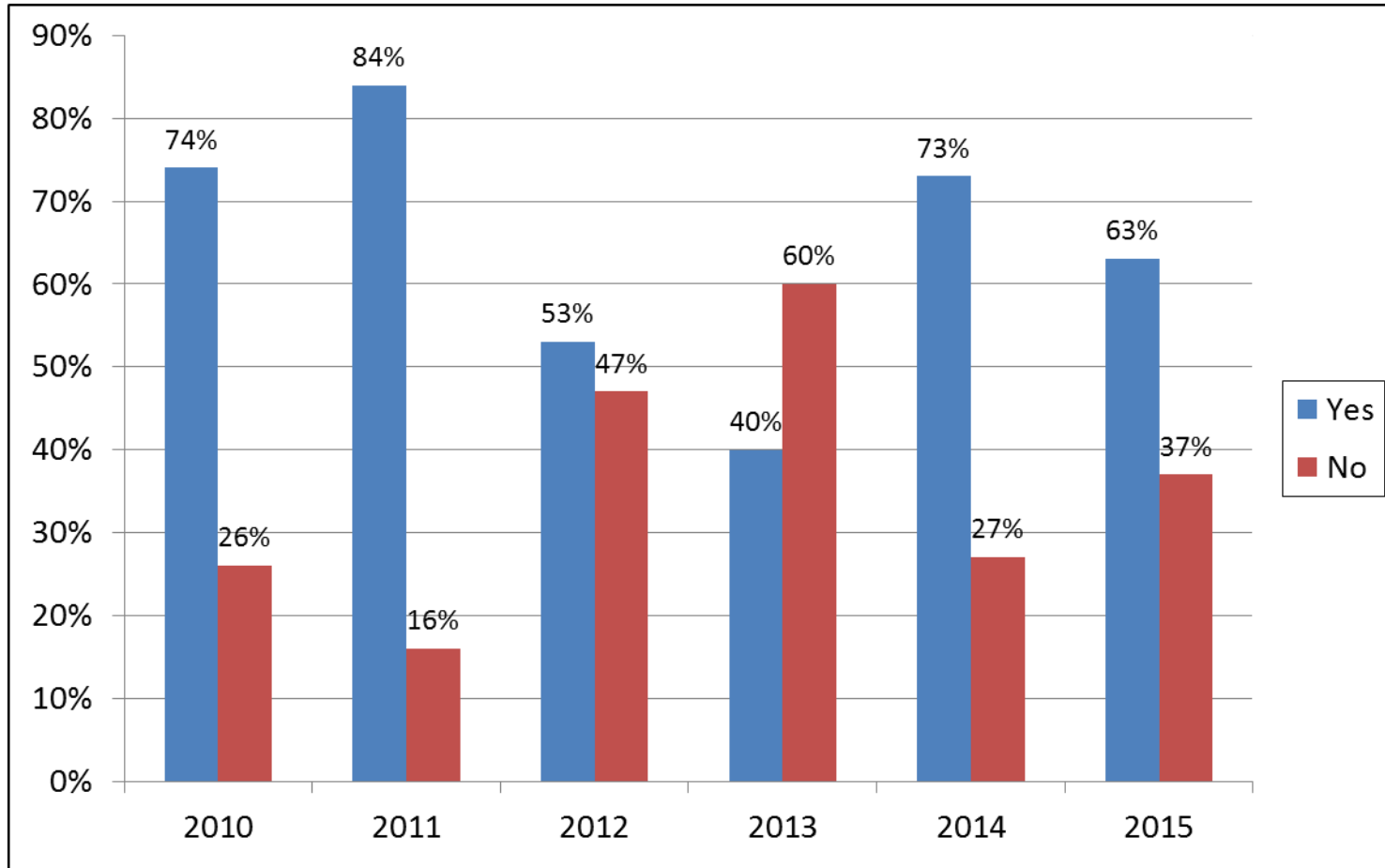
# Plan to visit KZN in the next twelve months for a holiday (contd.)



Some of the key reason for **NOT** planning to visit KZN in the next 12 months for a holiday are:

- Distance/destinations are too far
- Budget/financial constraints
- No time/busy/other commitments
- Prefer other destinations, such as Cape Town
  
- “Too hot”
- “Don’t like to travel”
- “Travelled whole of KZN, need something new” (see *recommendations*)

# Familiar with TKZN slogan?



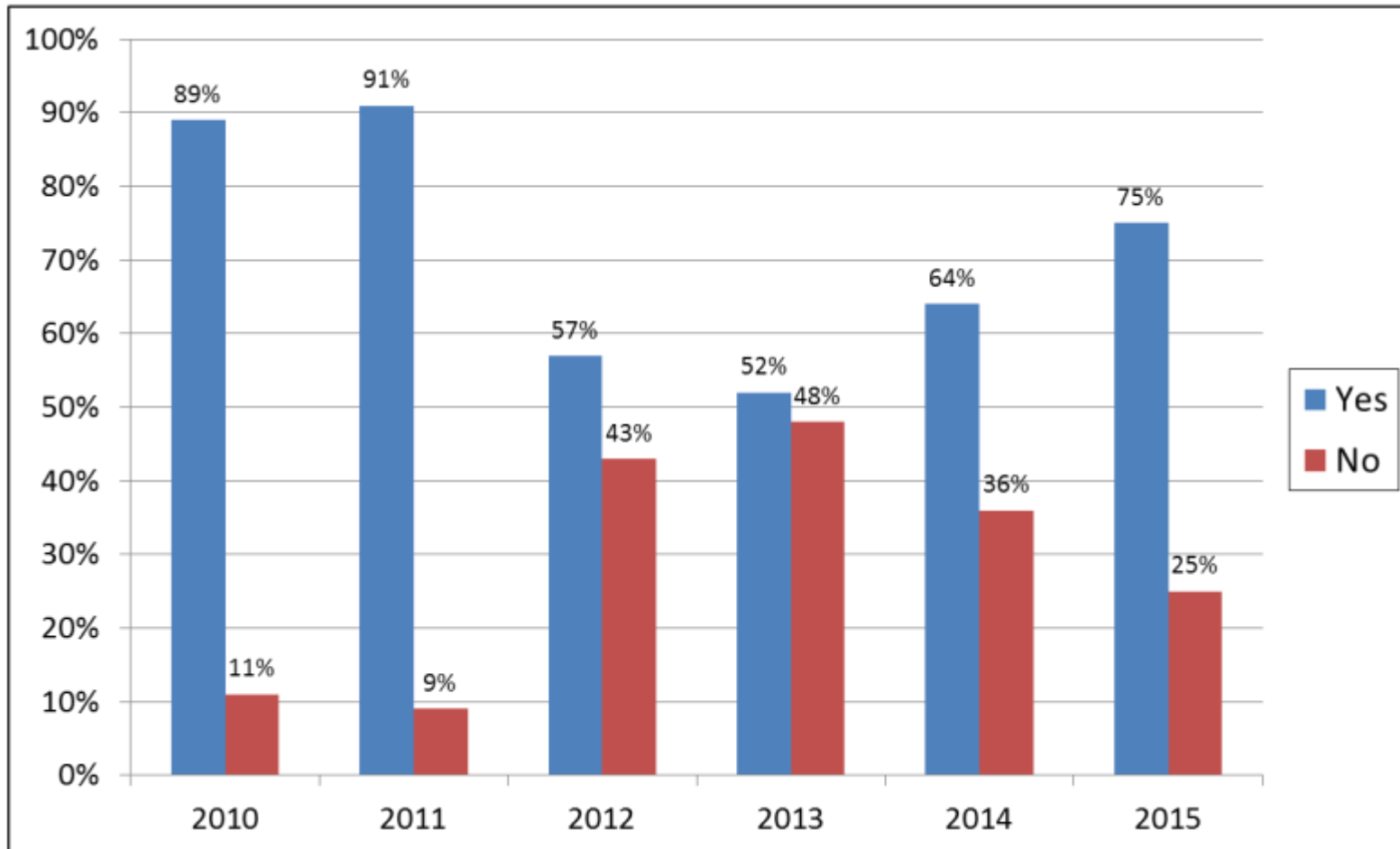
It is evident that there was an decrease in the number of respondents who were familiar with the TKZN slogan when comparing 2014 and 2015. This familiarity has never reached the same figure as in 2011 (84%) and this is due to the fact that the new slogan was only introduced in 2011. The unfamiliarity with the slogan is a cause for concern and an investigation is needed.

# Associations – TKZN slogan: Core Mentions



Association	2010	2011	2012	2013	2014	2015
Tourism holidays	8%	11%	-	18%	6%	4%
Zulu heritage, culture, King Shaka, Zulu people	<b>27%</b>	<b>48%</b>	<b>38%</b>	<b>26%</b>	<b>81%</b>	<b>37%</b>
TKZN, tourism organisation	10%	1%	-	1%	3%	3%
Culture	7%	7%	2%	-	12%	8%
KwaZulu-Natal	14%	16%	30%	23%	22%	7%
Nature	-	-	-	1%	1%	3%
Don't know	18%	-	5%	9%	3%	3%
Marketing	4%	-	2%	1%	1%	3%
Heritage	-	3%	2%	5%	6%	4%
Durban	-	-	5%	1%		1%
Exceptional/Striving	-	-	5%	-		0%
Friendliness	-	-	5%	-		0%
Game reserves	-	-	2%	-	1%	1%
Good service	-	-	2%	-		0%
People from KwaZulu-Natal	-	-	2%	-	5%	<b>15%</b>
Vibrant place	-	-	2%	-		0%
Other	13%	14%	2%	14%	17%	9%

# Noted TKZN logo?



When comparing 2014 and 2015, it seems as there has been an increase in the recognition of the logo. However, the recognition of the logo has never reached the figure of 2011 (91%). On a positive note, the noting of the logo has increased from 57% in 2012 to 75% in 2015.

# Where TKZN logo noted?



	2010	2011	2012	2013	2014	2015
Billboards/posters/banners	12%	11%	16%	11%	5%	33%
Brochures	14%	10%	7%	6%	4%	0%
Magazines	7%	8%	7%	8%	3%	1%
Newspapers	6%	2%	4%	1%	2%	1%
Clothing/Merchandise	5%	3%	3%	4%	4%	5%
uShaka Marine World	9%	15%	4%	4%	6%	4%
Tourism Information Office	7%	4%	4%	6%	3%	5%
Internet	8%	4%	8%	3%	8%	3%
TV	5%	2%	5%	13%	4%	4%
Holiday Swap KZN	-	-	-	-	-	1%
Other	1%	14%	-	15%	9%	8%
Durban	5%	1%	1%	8%	9%	7%
Airport	4%	13%	3%	5%	18%	6%

# Where TKZN logo noted? (Cont'd)



	2010	2011	2012	2013	2014	2015
Events	4%	<b>14%</b>	5%	1%	5%	3%
Various advertisements	3%	-	1%	3%	2%	1%
PMB	2%	-	3%	-	-	1%
Sibaya Casino	4%	-	1%	-	2%	0%
Not sure	4%	-	1%	7%	3%	<b>6%</b>
Canoe Marathon	-	-	<b>18%</b>	3%	5%	2%
KwaZulu-Natal	-	-	1%	-	2%	5%
Work	-	-	1%	-	-	0%
Rugby game	-	-	1%	-	0	0%
Tourism Indaba	-	-	1%	1%	1%	0%
Trade and investment	-	-	1%	-	-	0%
Campus	-	-	1%	-	-	0%
Midmar Mile	-	-	-	2%	1%	0%
Beach					2%	1%

# Where TKZN logo noted? (Cont'd)

## Top 5 places where the logo is noted



2013	2014	2015
Billboards/posters/banners	Airport	Billboards/posters/banners
uShaka Marine World	Durban	In and around KZN
TV	Internet	Airport
Events	uShaka Marine World	Tourism Information Office
Brochures	Dusi	Accommodation establishments

# Top Suggested Improvements



While the majority of the participants were happy with the overall event, some of the key comments/suggestions include:

- **Improvement of the water quality (Very important)**
- More activities for children/families
- More music/entertainment, “create more hype”
- More food stalls, a wider variety and healthier options
- More showers/toilets for participants/spectators
- More screens to see the paddlers, i.e. streaming
- A higher security presence is needed, especially along the route
- A larger media presence/commentators would be “cool”

Note: Some of these suggestions are also relevant for the specific days, i.e. Day 2 and the Finish.



# Special Feedback: Suggestions



## Day 2, Inanda Dam (20.02.2015)

While the vast majority of respondents thought improvements were not necessary on Day 2, some of the comments/suggestions were:

- Increase the amount of space for parking (especially for 'seconds')
- More activities for children/families
- Methods to reduce overcrowding
- More music/entertainment, "create more hype"
- More food stalls, a wider variety and healthier options
- More umbrellas/shaded areas
- More information/signage needed (i.e. where to go)
- More showers/toilets for participants/spectators
- More screens to see the paddlers (streaming)

# Special Feedback: Suggestions

Day 3, Blue Lagoon (21.02.2015)



While most of respondents thought improvements were not necessary on Day 3, some of the comments/suggestions were:

- Reverse start:
  - Was confusing but it was a good idea
  - Has a positive and negative aspect to it
  - Good for spectators but bad for participants who won previous day
  - “Don’t like it, as it was too early to start”
  - “Winners should come first, it is too late and we were already home/leaving”
- Live stream:
  - Improvement is needed
  - Needs to be advertised more
  - Stream all 3 days of the event
  - “Learn methods from Comrades”
  - The use of commentators for those not at the Finish

# Main Findings



- The majority of the respondents were local residents (61%). There was significant decrease in the proportion of respondents who were day visitors and an increase in overnight visitors. This could mean that there was a decrease in spectators as events such as the Comrades has a high number of day visitors who are essentially spectators.
- The majority (62%) of respondents who were interviewed were male.
- Most (69%) of the respondents indicated that they earned more than R10 000 per month. There was a significant increase the proportion of respondents who earned R30 000+ per month as well as respondents who earned between R1 000 and R5 000 per month.
- The largest proportion of respondents indicated that there were professionals (17%), followed by self-employed (18%).
- As expected most of the respondents were from KZN (85%) followed by Gauteng (12%). About 28 international participants entered the event. This equates to about 2% of the total. There was a slight decline in these numbers when compared to 2014 (46 or 3%). However the number of international participants is encouraging in terms of exposure of the event internationally.
- In 2015, a large proportion of non-resident respondents (29%) stayed with friends and relatives (VFR), 23% camped, while 10% stayed in B&B establishments and 10% stayed in family hotels. When compared to 2014, there was an decrease in the proportion of respondents who stayed in B&Bs and a decrease in those who stayed with VFR, but there was an increase in those who made use of camping facilities.

# Main Findings



- The average length of stay was 4 nights. When comparing 2014 and 2015, there was a decline in those who stayed for 3 nights and >4 nights. There was an increase those staying 1 and 4 nights. There was no difference in those staying for 2 nights. Thus more respondents are staying for either a short or a more lengthy period than previously. This is reflected in the increase in the average accommodation spend. This can also impact positively on the spend in the local economy.
- 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. There was no significant difference between 2014 and 2015.
- Approximately 78% 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. When comparing 2014 and 2015, there was a decline in the number of respondents who used private vehicles and an increase in those who used a mini-bus taxi.
- About 92% of respondents indicated they would attend the event again. 83% had attended the event previously. This suggests that the event is successful in maintaining its supporters.
- Respondents had positive experiences as 94% 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.

# Main Findings



- 88% of respondents did not experience any problems at the event. Problems that were experienced were in relation to issues such as parking, security and accommodation along the route.
- 63% of the respondents indicated that they recognized the TKZN slogan. This was a significant decrease when compared to 2014 (73%).
- 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.
- 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.
- 75% of respondents had noted the logo. This was a significant increase when compared to 2014 (64%).
- The main areas where the respondents noted the logo were:
  - Billboards/posters/banners
  - In and around KZN
  - Airport
  - Tourism Information Office
  - Other – accommodation establishments

# Recommendations



- The majority of respondents were happy with the event and there were only a select number of suggestions for improving the event.
- In addition to this, TKZN recommends the following for the **organizers**:
  - More trash cans in public spaces
  - More entertainment/something to draw the crowds (besides the main event)
  - A wider variety of food (and beverage) stalls
  - The big screen (on day 3) should show a ‘split’ of the finish line as well as shots from along the route
  - More “healthy food options”
  - Offer more prizes and incentives for participation
  - Revise the entry fees for the event
  - Initiatives to improve the water quality are long overdue and it is recommended that stakeholders such as municipalities, DWAF and Water Sanitation should be consulted.

# Recommendations



- In addition to this, the researchers recommend the following for **TKZN**:
  - Awareness campaigns are needed where TKZN promotes the awareness of the slogan and logo via tradeshows, advertising and social media.
  - More needs to be done to create a link between the slogan/logo and holidays/leisure in KZN.
  - Assist the event organizers to promote other activities and attractions in the area of which the event is taking place.