



The Dusi
Canoe
Marathon



The Unlimited Dusi 2013: Topline Summary Report



Wayne Tifflin
Karen Kohler
Tourism KwaZulu-Natal
July 2013

Methodology



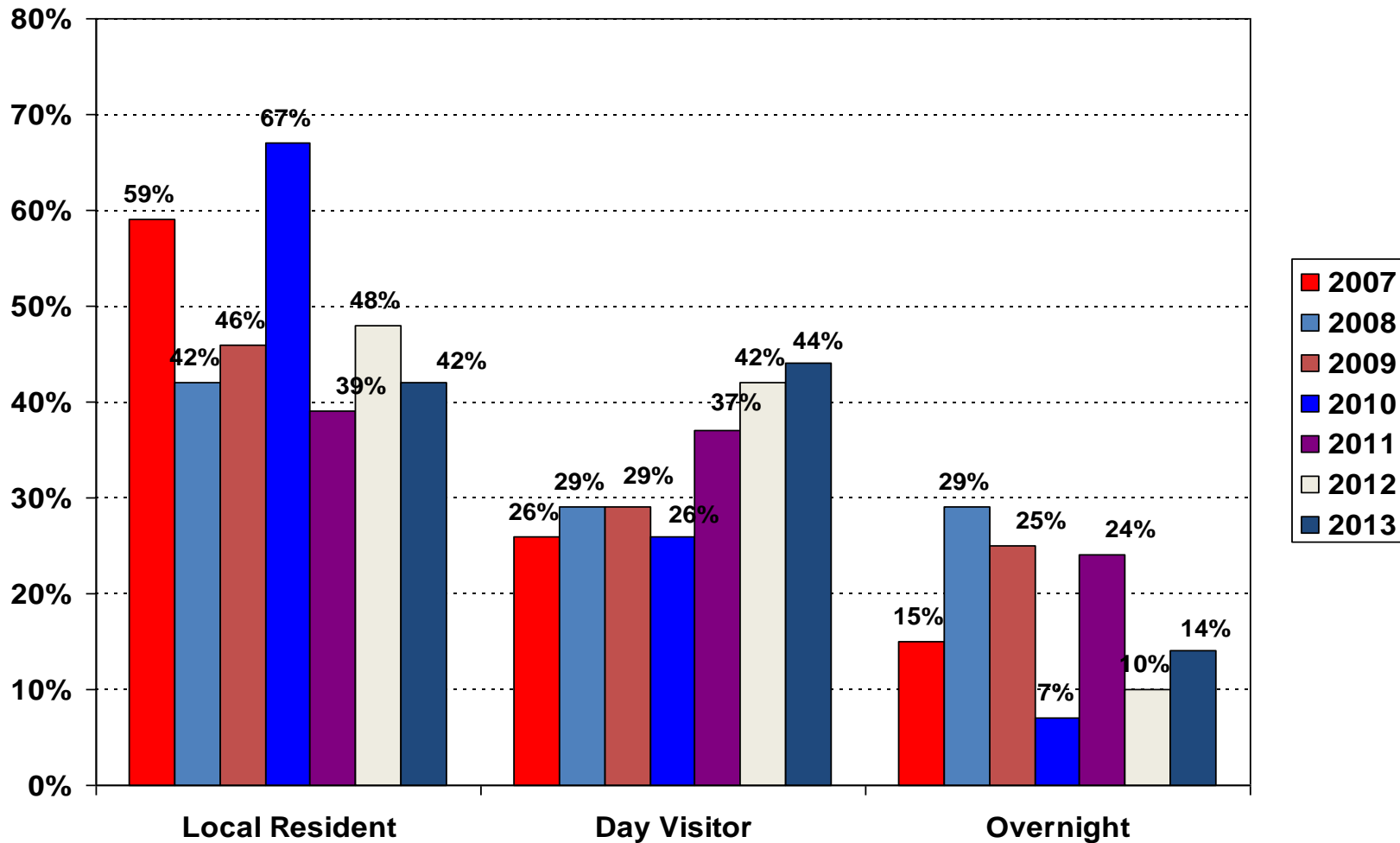
- Face to face survey with a probability sample of 214 respondents
- Respondents systematically selected by hour during two days of the event, on Thursday 14th of February and Saturday 16th of February 2013

Positive Highlights



- The spend on entertainment increased when comparing 2012 and 2013.
- 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

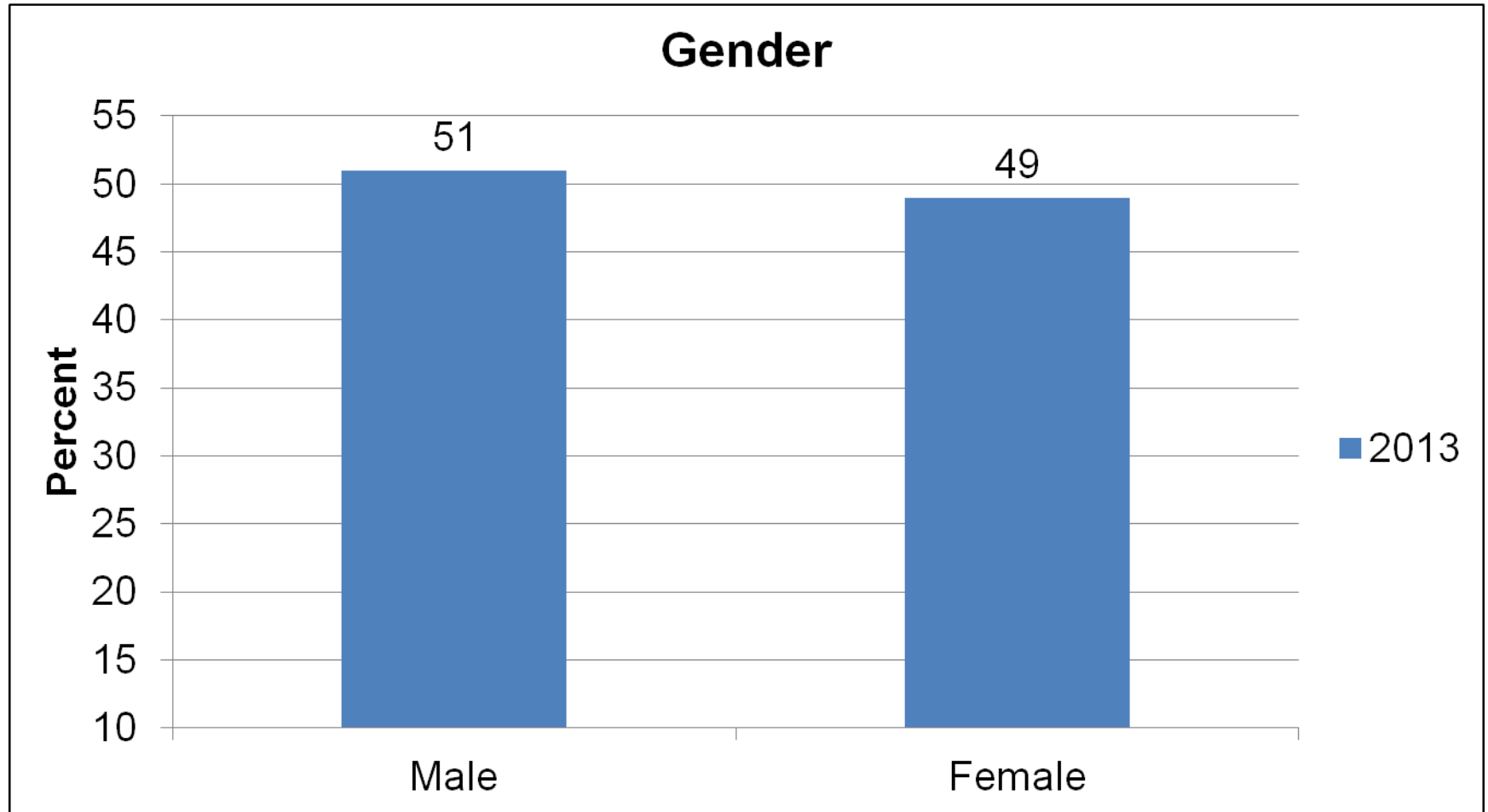


Nature of the Dusi Canoe Marathon Spectators and Participants – Residents vs Visitors (cont'd)



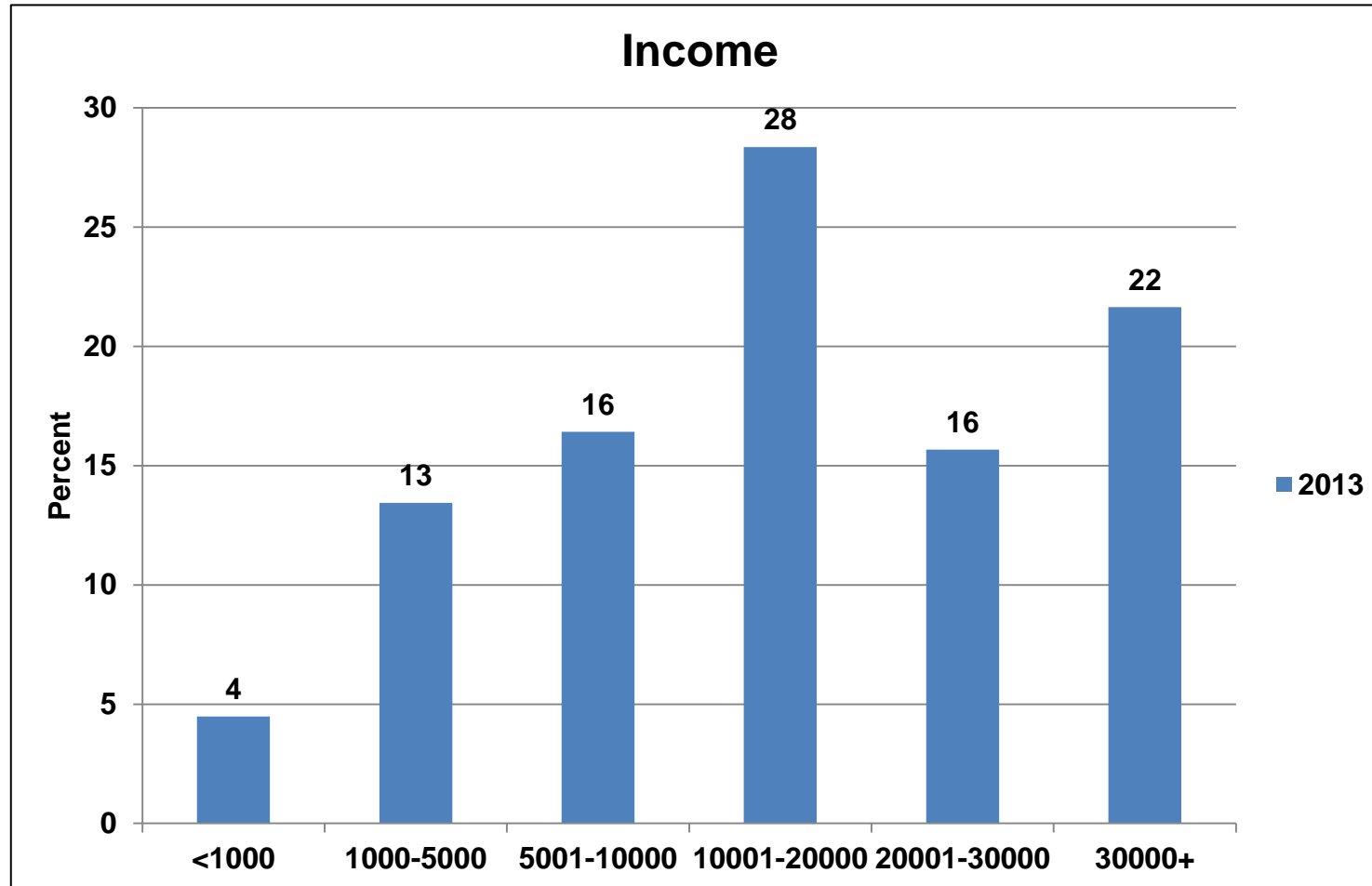
- A Z-Test of two independent sample proportions revealed the following:
 - there was no statistically significant increase in the proportion of respondents who were overnight visitors when comparing 2012 and 2013.
 - there was also no statistically significant difference in the proportion of respondents who were local residents when comparing 2012 and 2013.

Respondent Gender



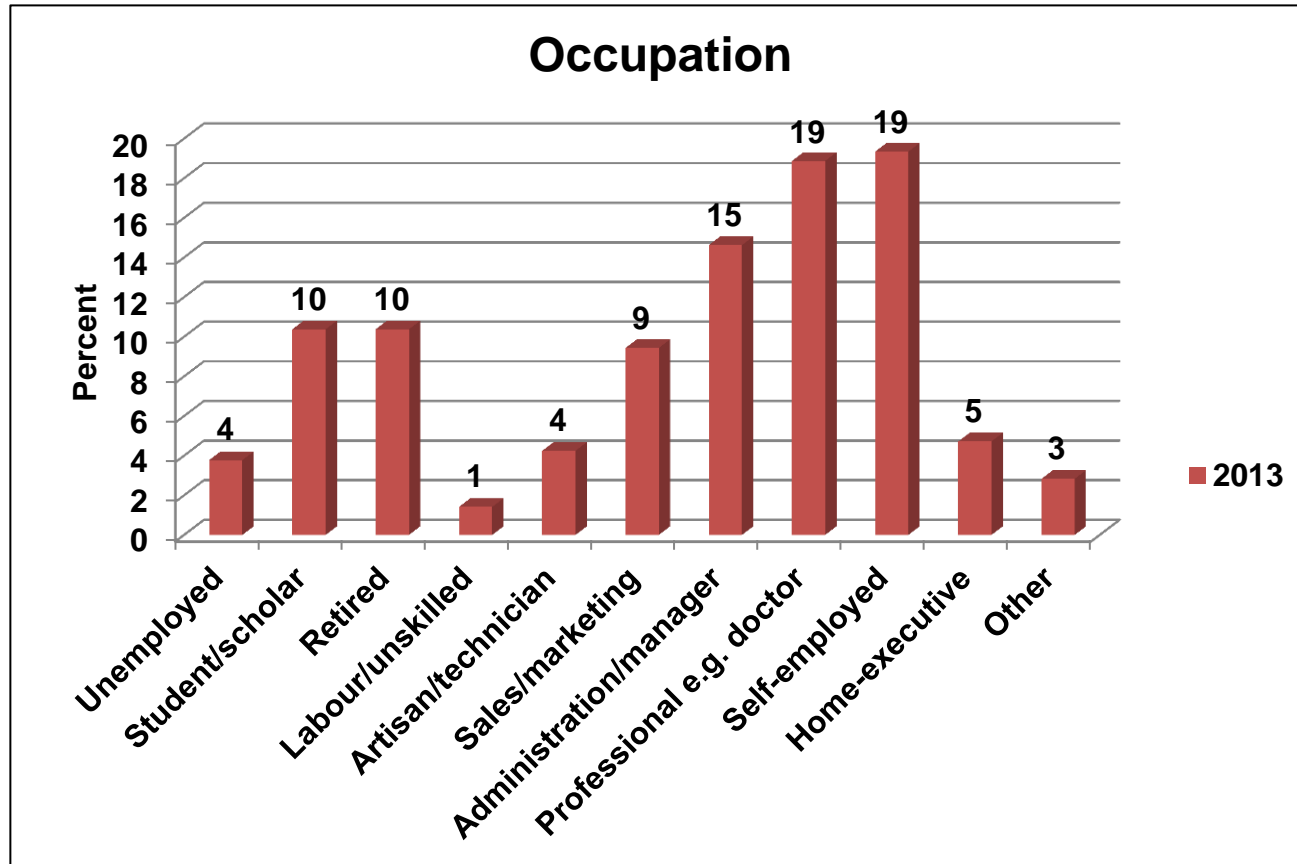
Almost as many females as males attended the event. Due to the higher number of males participating in the event it can be assumed then that most of the spectators were female.

Respondent Income



Most respondents had an income of more than R10 000. This indicates that the participants and spectators at the event have relatively good incomes and are can be a good market for branding and marketing the province.

Respondent Occupation



This slide supports slide 7, in that most respondents are professionals or self-employed, thus earning a relatively good income. Once again this highlights the opportunity available to access this segment of the market in terms of advertising and marketing.

Nature of the Dusi Canoe Marathon Spectators and Participants



South Africa Province of Residence

	KZN	Gauteng	W Cape	N Cape	E Cape	Free State	Mpumala-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%	-	-

Nature of the Dusi Canoe Marathon Spectators and Participants (cont'd)



- A Z-Test revealed the following:
 - There was a no statistically significant difference in KZN spectators and participants between 2012 and 2013.
 - A statistical increase in Gauteng spectators/participants could not be determined as the responses were below the minimum number required to calculate such tests.

Estimated Mean Spend per Category



	2011	2012	2013
Accommodation	R1 642	R2 843	R1 983
Transport	R733	R716	R757
Food and Beverage	R389	R420	R397
Entertainment	R346	R244	R492
Souvenirs	R268	R458	R282
Average Total Spend	R1 031	R1 542	R1 274

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.

Estimated Economic Impact



	2009		2010		2011		2012		2013	
	N	Mean	N	Mean	N	Mean	N	Mean	N	Mean
Participants	1 477	R1 907	1 800	R1 193	1 741	R1 321	1 679	R2 564	1 564	R1 694
Spectators: local residents	3 685	R265	3 685	R500	1 313	R255	1 680	R 469	2 520	R437
Spectators: day visitors	1 485	R250	1 430	R790	1 750	R524	1 470	R1 184	2 640	R718
Spectators: overnight visitors	330	R3 397	385	R2 964	438	R3 035	600	R4 916	840	R4 874

Mean spend for spectators has dropped when compared to 2012. Overnight visitors' spend has remained constant. Participants spend has also decreased when compared to 2012.

Estimated Economic Impact (cont'd)



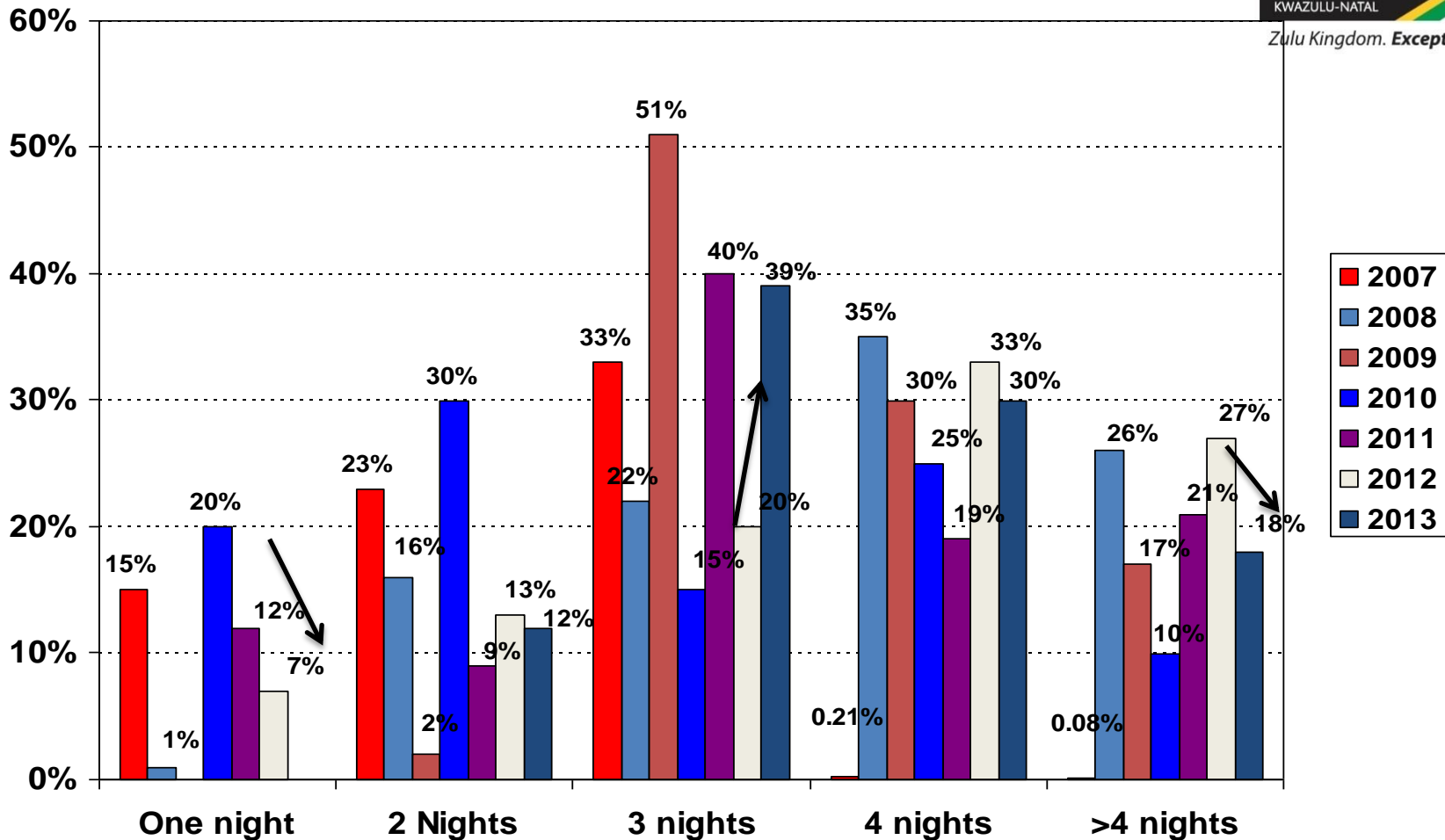
		2009	2012	2011	2012	2013
Estimated Direct Impact	At Least:	R1 822 155	R1 641 956	R3 307 277	R3 113 415	R4 999 453
	As much as:	R3 973 779	R4 959 634	R6 455 964	R12 419 598	R12 461 510
Estimated Total Impact	At least	R2 587 461	R2 331 578	R4 696 333	R4 421 050	R7 009 223
	As much	R5 642 766	R7 042 680	R9 167 469	R17 635 055	R17 695 345

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



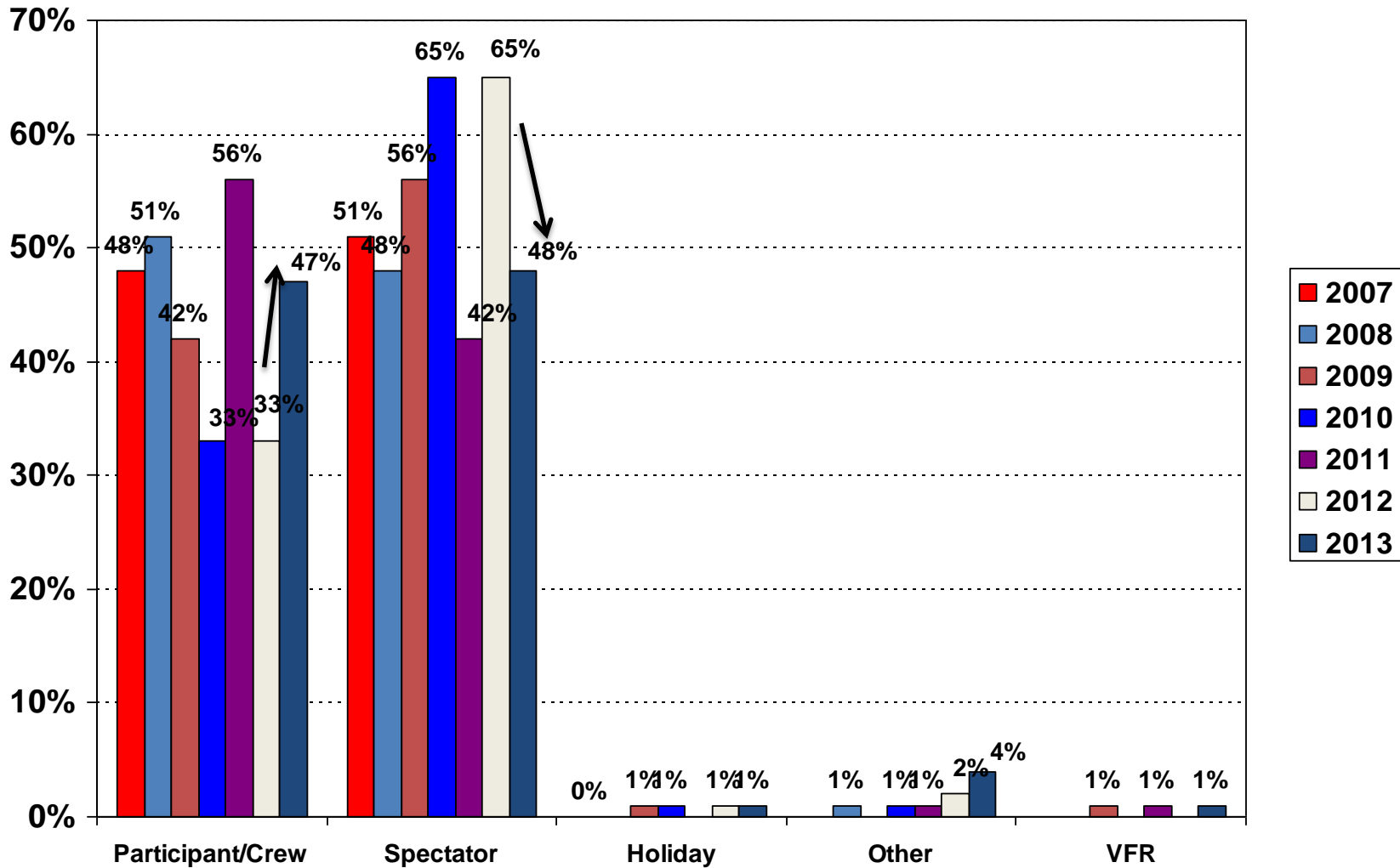
Zulu Kingdom. Exceptional



Average stay: 3.4 nights

3 nights stay has increased and 4 and over 4 nights stay has decreased. This may have affected the mean spend depicted in slide 9. There also seems to be a decline in respondents who stayed one night and over 4 nights. However this was not statistically confirmed.

Primary reason for visiting area where event is taking place



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 2012 and 2013.

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%	-	-

Statistical analysis could not be performed as the number of responses was below the minimum required to perform such tests. There seems to be an increase in the use of family/friends and camping accommodation.

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%

A Z-Test revealed no significant difference in the proportion of respondents who used private vehicles when comparing 2012 and 2013. The use of *private vehicles*, *airplanes* and *other* seemed to have increased, while the use of *minibus taxi* have decreased.

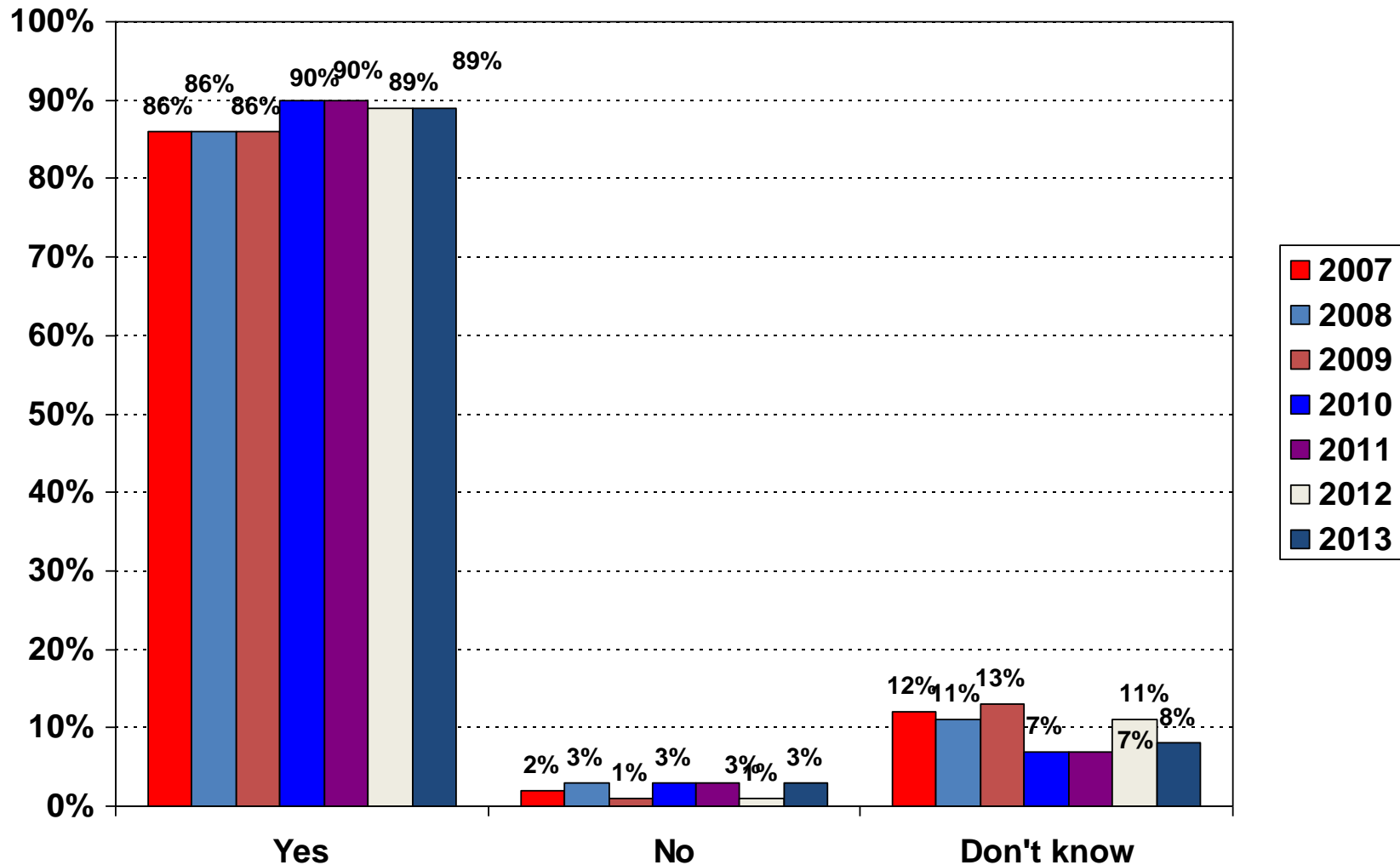
Influenced to attend?



	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%

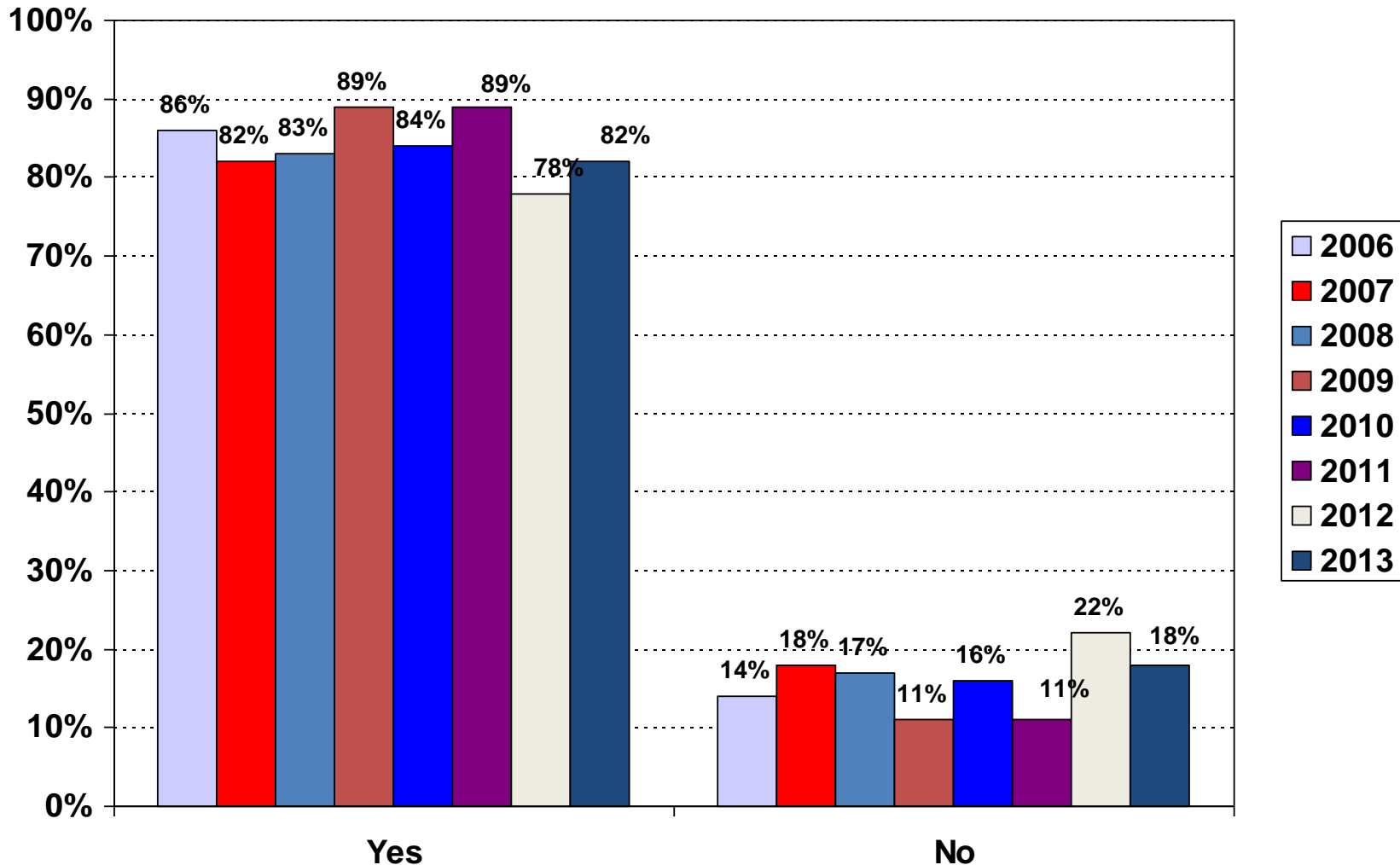
A Z-test revealed a statistically significant difference in respondents who indicated that they *attended the event previously* when comparing 2012 and 2013. Although there seems to be an increase in the *word-of-mouth* influence to attend when comparing 2012 and 2013, the cell size of 2012 as too small to conduct a statistical analysis.

Attend again?



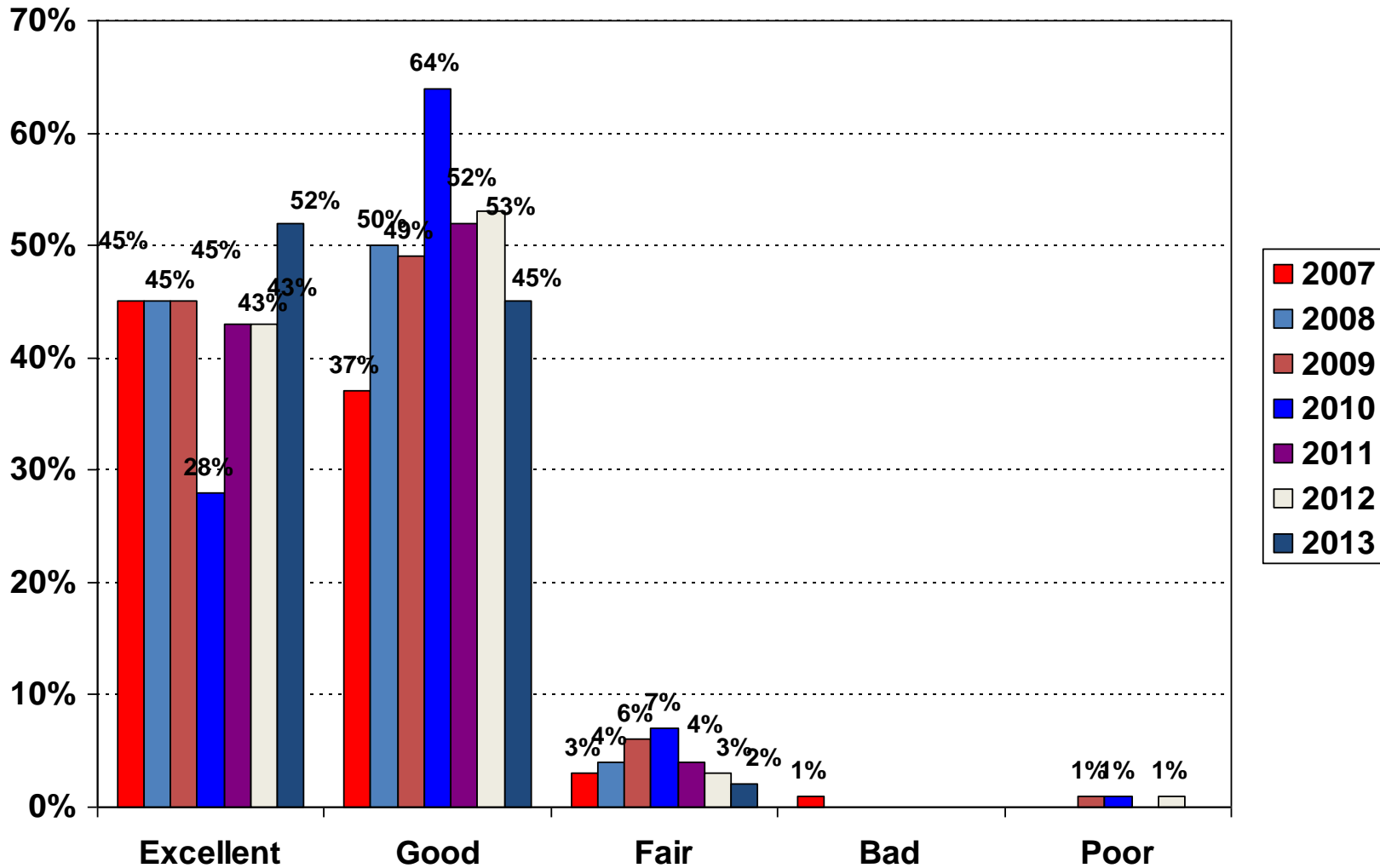
A Z-test could not be conducted due to the low cell numbers.

Attend in previous years?



A Z-test revealed no statistically significant difference in previous attendance when comparing 2012 and 2013. However, more new attendees need to be encouraged to attend the event in order to grow the event.

Experience?



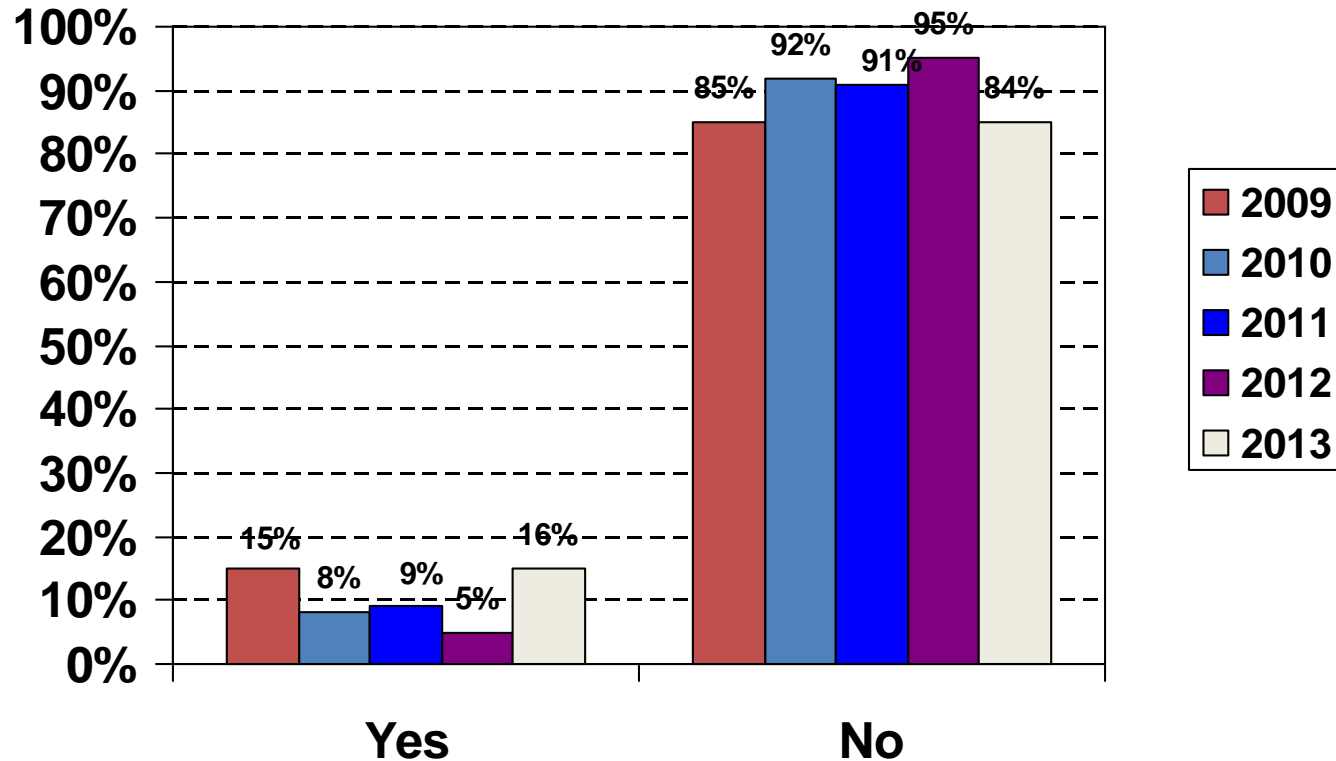
Experience? (cont'd)



Z- Test Analysis

- There was no statistically significant difference between 2012 and 2013 for either the *excellent* or *good* rating.

Experienced problems?



Problems that were experienced were related to the following:

Parking
Signage

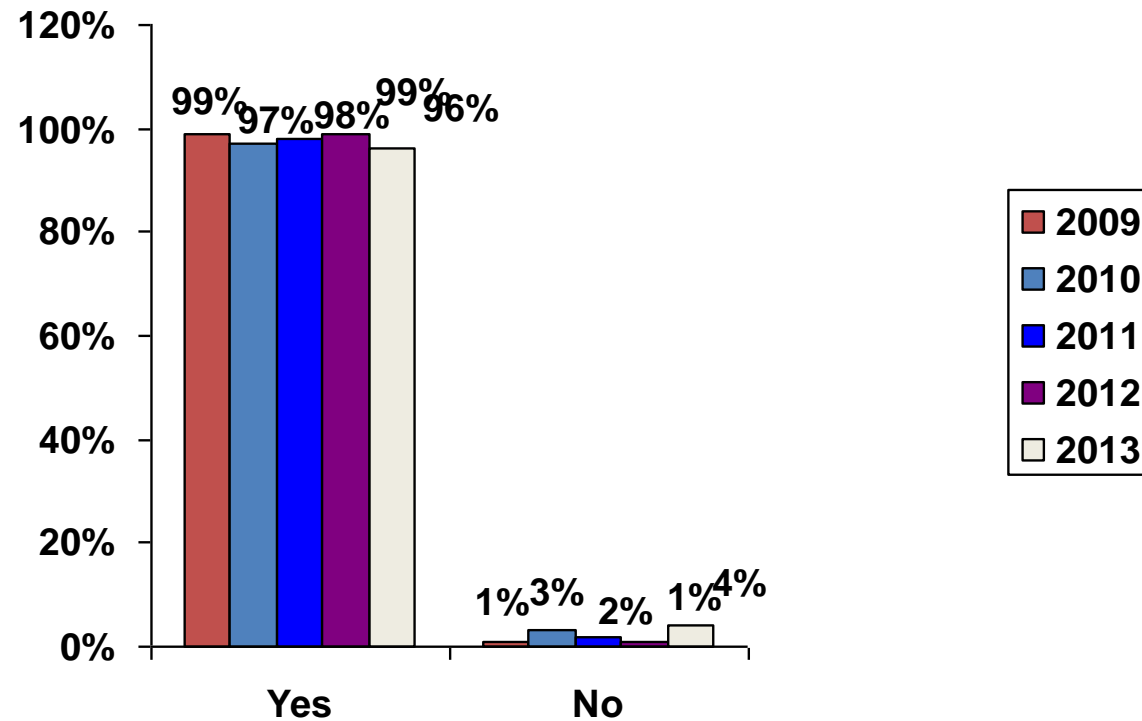
A Z-test revealed a statistical decrease in the number for respondents who did not experience problems

Days attended

Days Attended	2012	2013
All days	43%	38%
Saturday only	39%	51%
Friday and Saturday	4%	6%
Thursday and Saturday	9%	3%
Thursday and Friday	2%	1%
Thursday only	4%	1%

A Z-test did not indicate any statistical significance between 2012 and 2013.

Recommendation of the event to family and friends



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



Variable	Percent
Yes	83%
No	17%

Reasons: Visiting KZN



- The positive responses were related to the destination having the following characteristics:
 - Beaches
 - Beautiful weather
 - Drakensberg
 - Hluhluwe
 - Fun
 - Family Visit

Unique attraction in KZN



Zulu Kingdom. *Exceptional*

Attraction	Count
Drakensberg	46
uShaka Marine World	46
Beach	44
Moses Mabhida	24
Game farms/reserves	23
Sea	17
Dusi	15
1000 hills	9
Midlands Meander	7
Beachfront	6
Comrades Marathon	6
Mountains	6
Hluhluwe	5
Midmar Mile	5
Battlefields	3
Durban	3
Gateway Shopping Centre	3
Howick Falls	3
Oribi Gorge	3
Rivers	3
St. Lucia	5
sporting event	3
Ballito	2
Coast	2
Sharks Board	2
uMgeni River	2

Atmosphere of KZN



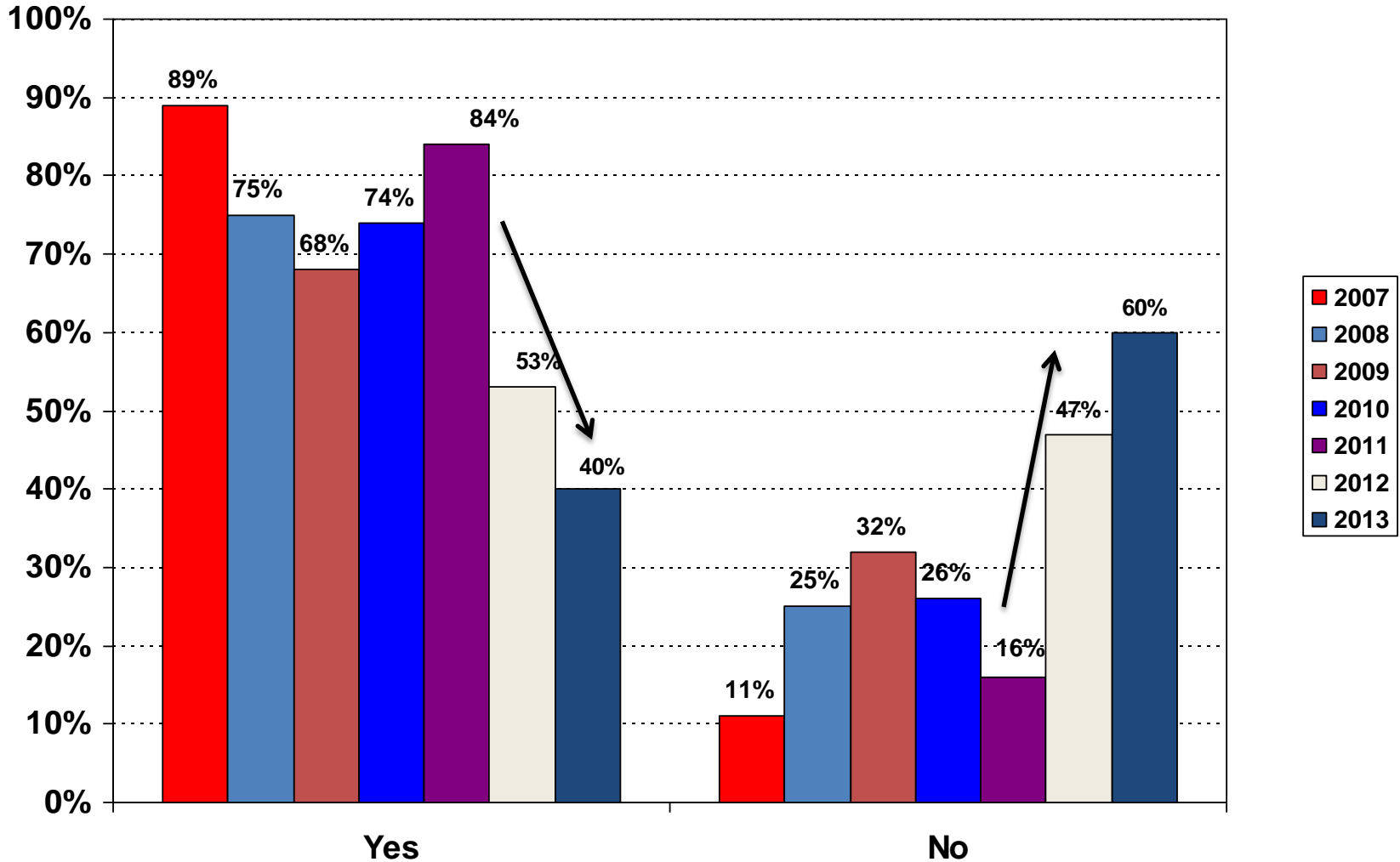
Variable	Count
Friendly	52
Happy mood	37
Calm & relaxed, easy going	28
Fun	26
Good	10
Party	10
Enjoy holiday	7
Festive	7
Chilled/laid back	6
Cool vibe	5
Energetic	5
Enthusiastic	4
Sun/hot	3
Happy	3
Always good/great	2
Awesome	2
Outdoors lifestyle. Healthy and sporty	2
Lovely atmosphere	2

Images of KZN



Image	Count
Beach	71
Sea/ocean	45
Mountains, Drakensberg	34
Sun	23
Green	17
Paddling/Dusi/rivers	17
Wildlife	13
Beautiful scenery	11
Good weather	10
Friendly people	9
Home	5
Comrades	4
Diversity	4
Fun	4
Outdoor lifestyle	4
Bush	3
Durban	3
Midlands	3
Rugby	3
Sport	3
Health	2
Holiday	2
Humidity	2
Landscape	2
The vibe, the people	2
Zulu culture	2
Coastal activities/surfing	2

Familiar with TKZN slogan?



Familiar with TKZN slogan?

(cont'd)



Z-test Analysis

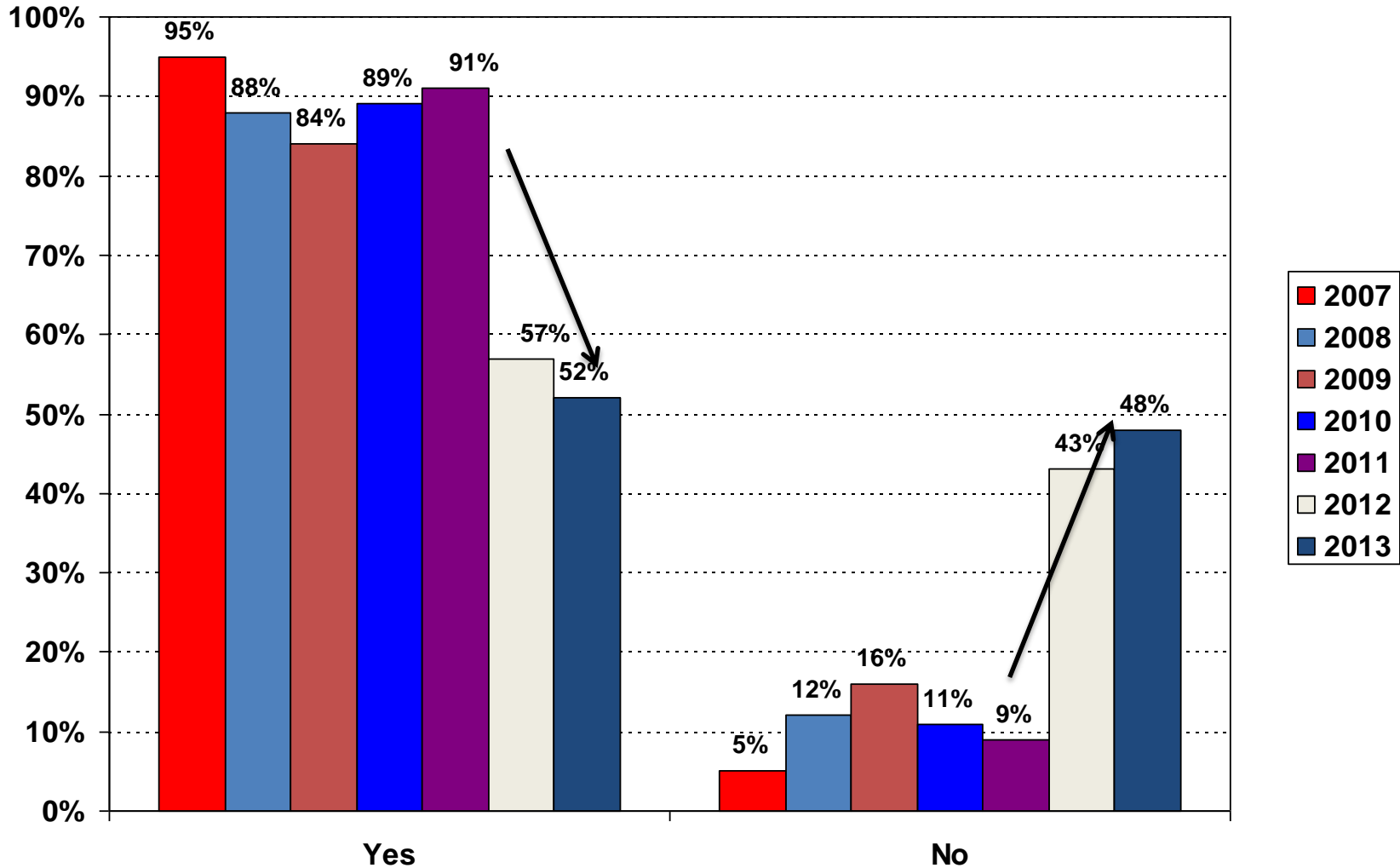
- The Z-Test of two independent sample proportions suggested that there was no statistically significant difference between the proportion of respondents who were familiar with the Zulu Kingdom slogan when comparing 2012 and 2013. However, there seems to be a decline in the noting of the slogan.

Associations – TKZN slogan: Core Mentions



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

Noted TKZN logo?



There is a decline in the noting of the TKZN logo.

Noted TKZN logo? (cont'd)



Z-Test Analysis

- Comparing 2012 and 2013, 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?



Zulu Kingdom. *Exceptional*

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

Where TKZN logo noted? (Cont'd)



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

Where TKZN logo noted? (Cont'd)

Top 5 places where the logo is noted



Billboards/posters/banners
uShaka Marine World
TV
Events
Brochures

Suggested Improvements?



Zulu Kingdom. Exceptional

Suggestions	2011	2012	2013
Happy with organisation/management of the event	26	11	6
More and clear road signs	13	3	11
Increase parking areas	10	2	20
Other	9	-	-
Clear the bushes by the river/ clean the river	8	1	1
Entertainment/activities for spectators (children/adults)	7	5	1
Provide shelter including more umbrellas and chairs	6	4	7
More Traffic control/officers	6	2	-
More food stands/variety	4	1	2
Invite other race groups to participate	2	-	2
More lifeguards – bigger rapids	2	-	1
More facilities - water stations, tables, picnic spots	2	-	3
More TV Coverage	1	-	-

Although there seem to be fewer respondents who indicated that they are happy with the event, it is rather a case of the lack of parking that has become an important issue.

Suggested Improvements? (cont'd)



Suggestions	2011	2012	2013
Event to end on Sunday	1	-	-
Toilet facilities at one of halfway stops	1	-	-
Improve the skills of lifeguards	1	-	-
Introduce the event at school level	1	-	-
Its expensive - decrease the fees	1	-	2
Need to have updated results	1	2	-
Improve the sponsors' jokes on the intercom	1	-	-
Plant trees for shade	1	-	-
More tents and fans	1	-	-
The event to take place in January, not February	1	-	-
Participants to be given new canoes	1	-	-
Invite international participants	1	-	-
Provide more sitting areas	1	-	-
Commentators concentrate too much on winners	-	1	-
Traffic on route is a problem	-	-	2

Suggested Improvements? (cont'd)

Suggestions	2011	2012	2013
Extend Portages	-	1	-
Have more big screens in the tents	-	1	-
Increase prize money	-	1	-
Promote the event early	-	2	-
Limit the seconding vehicle to one per canoe	-	1	1
Move the finish line a bit further	-	1	-
Local people to work on the route to get more people working during the event	-	1	-
No plastic stickers on the boats they litter the river	-	1	1
Promote the sport continuously not just at this time	-	1	-
Make sure that the route does not have any hazards	-	1	-
More female participants	-	1	-
Registration area had uncut grass, litter and no spectator facilities			2

Conclusion/Main Findings



- There was no significant difference in the proportion of respondents who were overnight visitors or local residents when comparing 2012 and 2013.
- There was no significant difference in the proportion of respondents who were from KwaZulu-Natal. There was a statistically significant change in the proportion of Gauteng respondents which suggests an increase in visitors from Gauteng.
- In 2013, a large proportion of non-resident respondents (43%) stayed with friends and relatives (VFR), 23% camped while 20% stayed in B&B establishments. A significant difference could not be determined as the number of responses were below the minimum requirement to perform a statistical test. There was an increase in the proportion of respondents who stayed in B&Bs when compared to 2012. This could not be tested statistically due to the small cell size of 2012.
- Word-of-mouth (32%) and previous attendance/participation (55%) 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 know of someone involved in the sport or event.
- Approximately 90% 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.

Conclusion/Main Findings



- About 89% of respondents indicated they would attend the event again. 82% 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 97% 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.
- 84% of respondents did not experience any problems at the event. Problems that were experienced by 16% of respondents, a statistical increase from 2012. The problems had to do with:
 - Parking too far from the tents
 - Poor signage along the route
- About 43% of the respondents attended all 3 days of the event compared to 38% in 2012. However, there was no statistically significant increase in this regard.
- About 83% of respondents indicated they would visit KZN in the next 12 months. The reasons were:
 - Beach
 - Beautiful weather
 - Drakensberg
 - Family visit
- The new slogan, *Zulu Kingdom. Exceptional*, was tested for the second time this year. Only 40% of the respondents indicated that they were familiar with the TKZN slogan with a Z-test suggesting no significant difference when comparing 2012 (53%) and 2013.

Conclusion/Main Findings



- However, most respondents continued to associate the slogan with Zulu history/kings/heritage/culture, KZN and with tourism/holidays. These were the dominant associations.
- The new TKZN logo was tested for the second time this year. Only 52% of respondents had noted the logo. A Z-test showed no significant difference in the noting when comparing 2012 (57%) and 2013.
- The main areas where the respondents noted the logo were:
 - Billboards and posters (21%)
 - uShaka Marine World (15%)
 - Clothing/Merchandise (13%)
 - Internet and Airport (10%)
- In terms of suggested improvements, the majority of respondents indicated that there was not enough parking. Also, more and clearer road signs need to be erected on the route. Further, there needs to be more shelter, umbrellas and chairs for spectators. The organizers did provide these, but it seems as though there were not enough provided.
- The researcher noted that the change in the format of the event with the top paddlers finishing later in the day provided an incentive for spectators and participants to stay for a longer period at the event.

Conclusion/Main Findings



- The top four characteristics of KZN that respondents mentioned were:
 - Beach/sea/ocean
 - Mountains
 - Green scenery
 - Paddling/rivers
- In terms of atmosphere that respondents would expect in KZN, they indicated the top four as follows:
 - Friendly
 - Happy
 - Calm, relaxed
 - Fun
- In terms of unique attractions of KZN, respondents indicated the following in the top five:
 - Drakensberg
 - uShaka Marine World
 - Beaches
 - Moses Mabhida Stadium
 - Game reserves

Recommendations



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

1. Parking seems to be a problem. A suggestion is for the organizers to provide a shuttle service between the Berea Rovers clubhouse and the finish in order to alleviate some of the parking pressure at the finish.
2. As indicated earlier the organizers did provide umbrellas and chairs. However, more should be provided along the bank of the river.
3. The number of entrants seemed to remain the same as last year. It is suggested that the organizations promote the Dusi at international canoeing events, so as to increase the number of international participants.
4. More attractions/activities at the finish to attract more spectators to the event.
5. More advertising of the event prior to the event being held so that the public knows that it is Dusi Weekend in Durban.