

6th MIM Pan African Malaria Conference

7 - 11 October 2013

Top Line Summary

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Highlights



- 66% of the respondents stayed in 4 and 5 star hotels.
- 98% of the respondents rated Durban as an *excellent, very good or good* convention destination.
- 95% of the respondents rated Durban as an *excellent, very good or good* holiday destination.
- 76% of the respondents rated Durban as an *very good* and *good* value for money destination.
- The direct spend as a result of the event was estimated to be between R4.2mn and R5.8mn.

Objectives



- To determine the profile of delegates who attended the 6th MIM Pan African Malaria Conference on 7-11 October 2013.
- To determine what factors influenced their decision to attend this conference and to what degree.
- To ascertain their travel and activity patterns over the period of this conference.
- To determine their perceptions of the overall organisation of the conference, the conference venue and Durban as a tourist destination.

Methodology

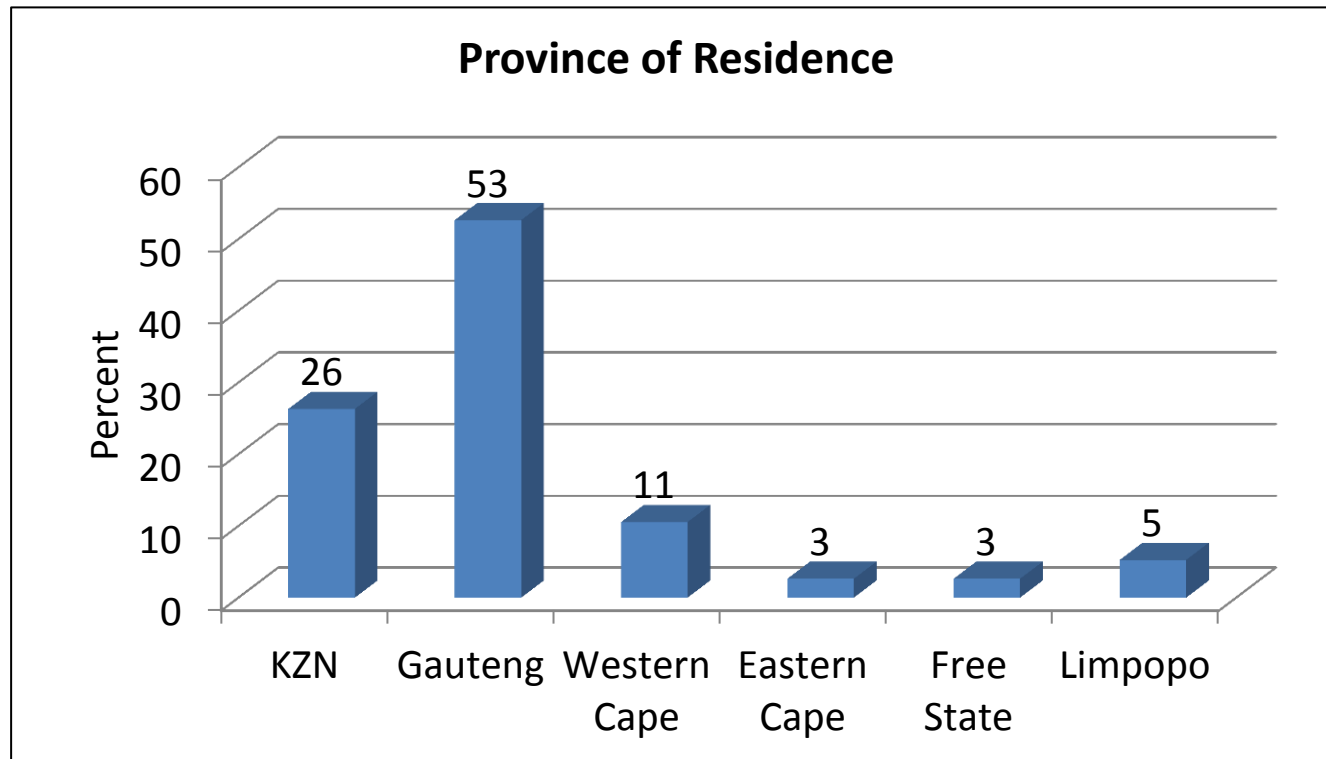


- Face to face survey – 255 respondents.
- Probability sample design.
- Stratified allocation by day.
- Respondents systematically selected.
- Secondary data provided by the organizers.

Limitations:

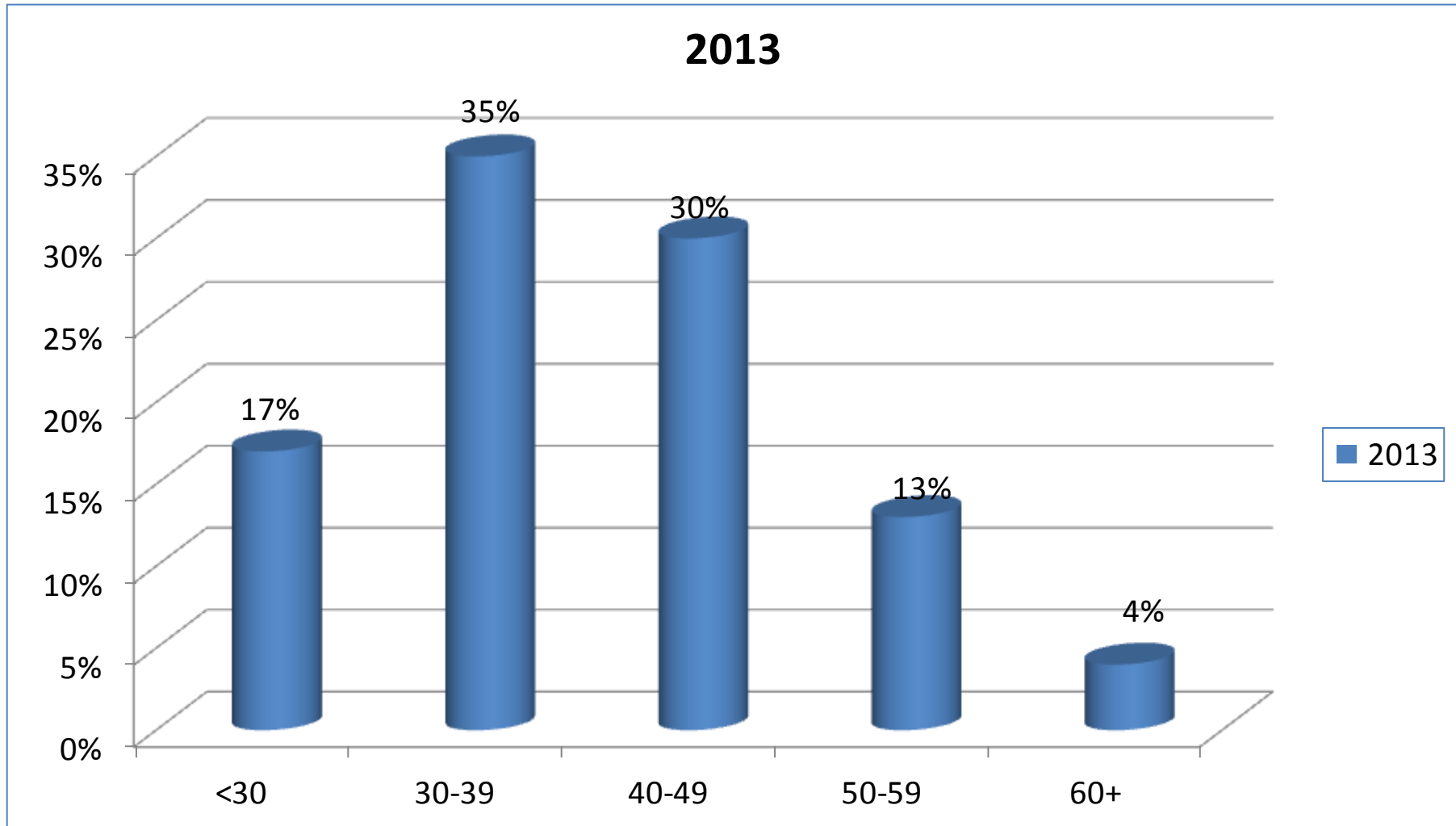
- This survey was only based on respondents who were regarded as conference delegates.
- Thus the results of this survey indicate the estimated total impact of the conference delegates and visitors to the exhibition.

Domestic Respondents



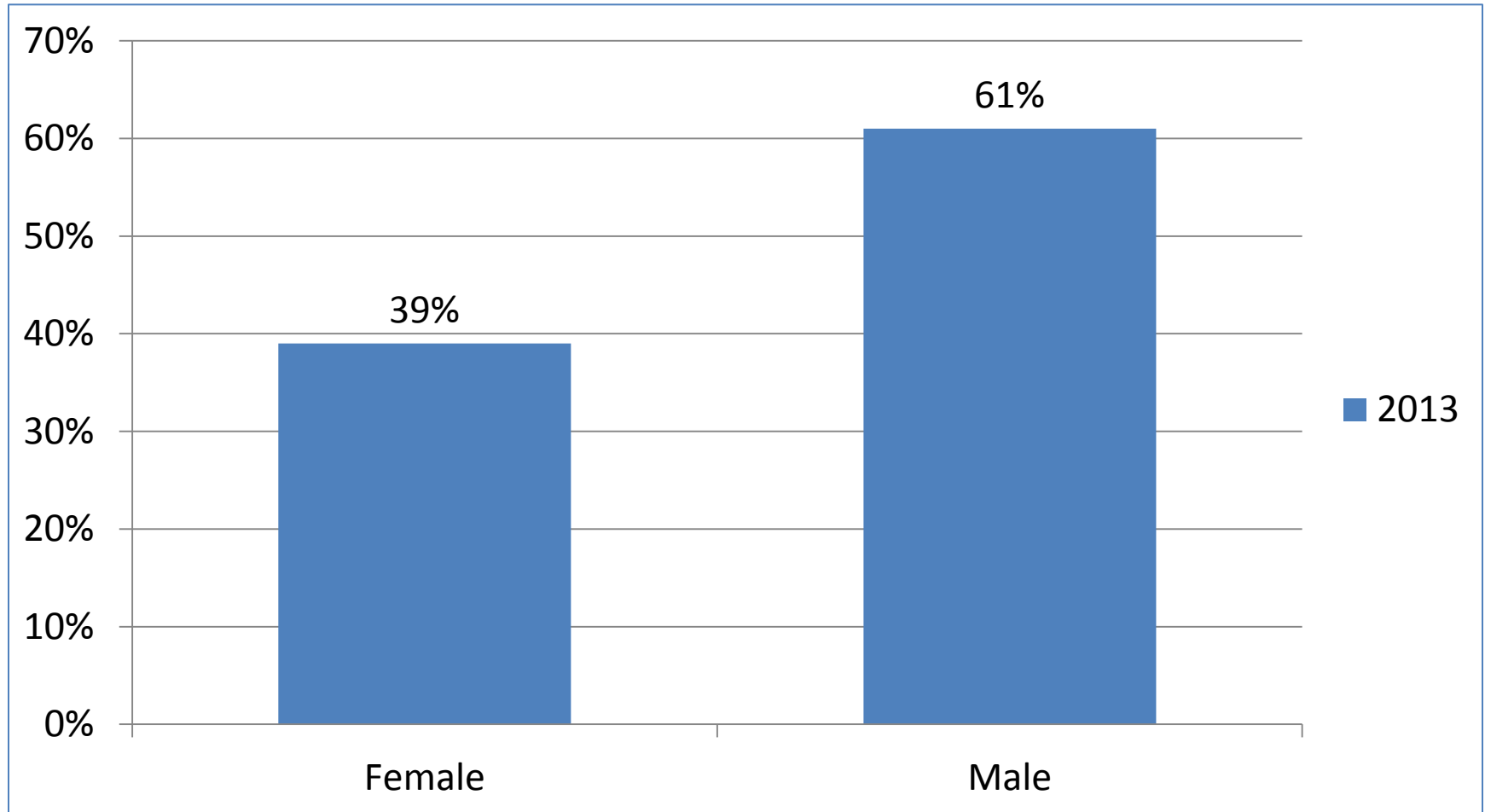
Respondents	2013	
South African	37	15%
Foreign	218	85%
Total	255	100%

Age Group



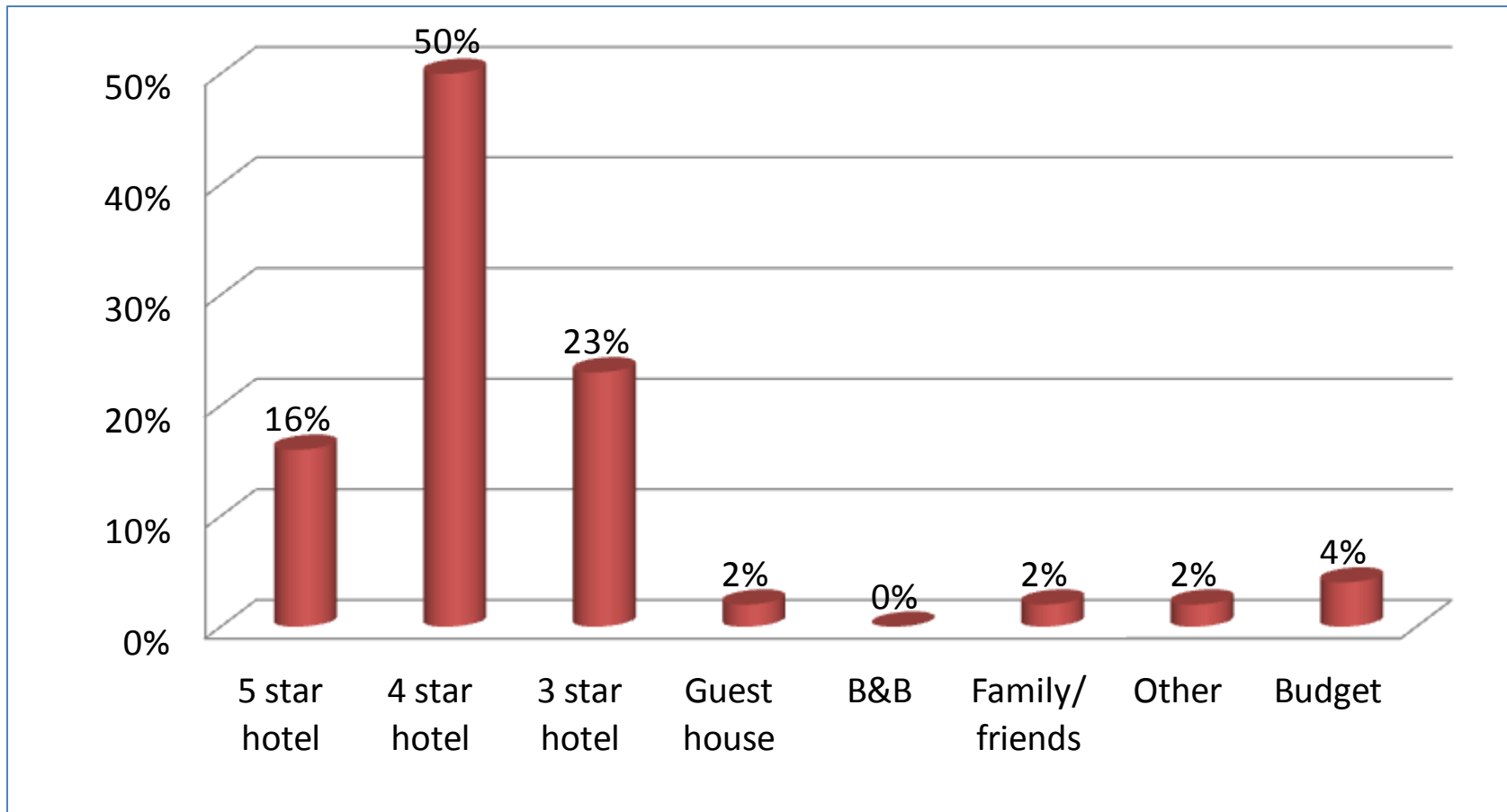
Most of the respondents were between the ages of 30 and 49 years old. A significant number were under 30 years old.

Gender



Most of the respondents were male.

Accommodation



4 star and 3 star hotels were mostly used by respondents. With the high number of international visitors using stronger currencies this is not surprising.

Length of Stay: Average Nights



With the conference being 5 days, most delegates stayed 1 night extra. It is clear that delegates only stayed for the duration of the conference.

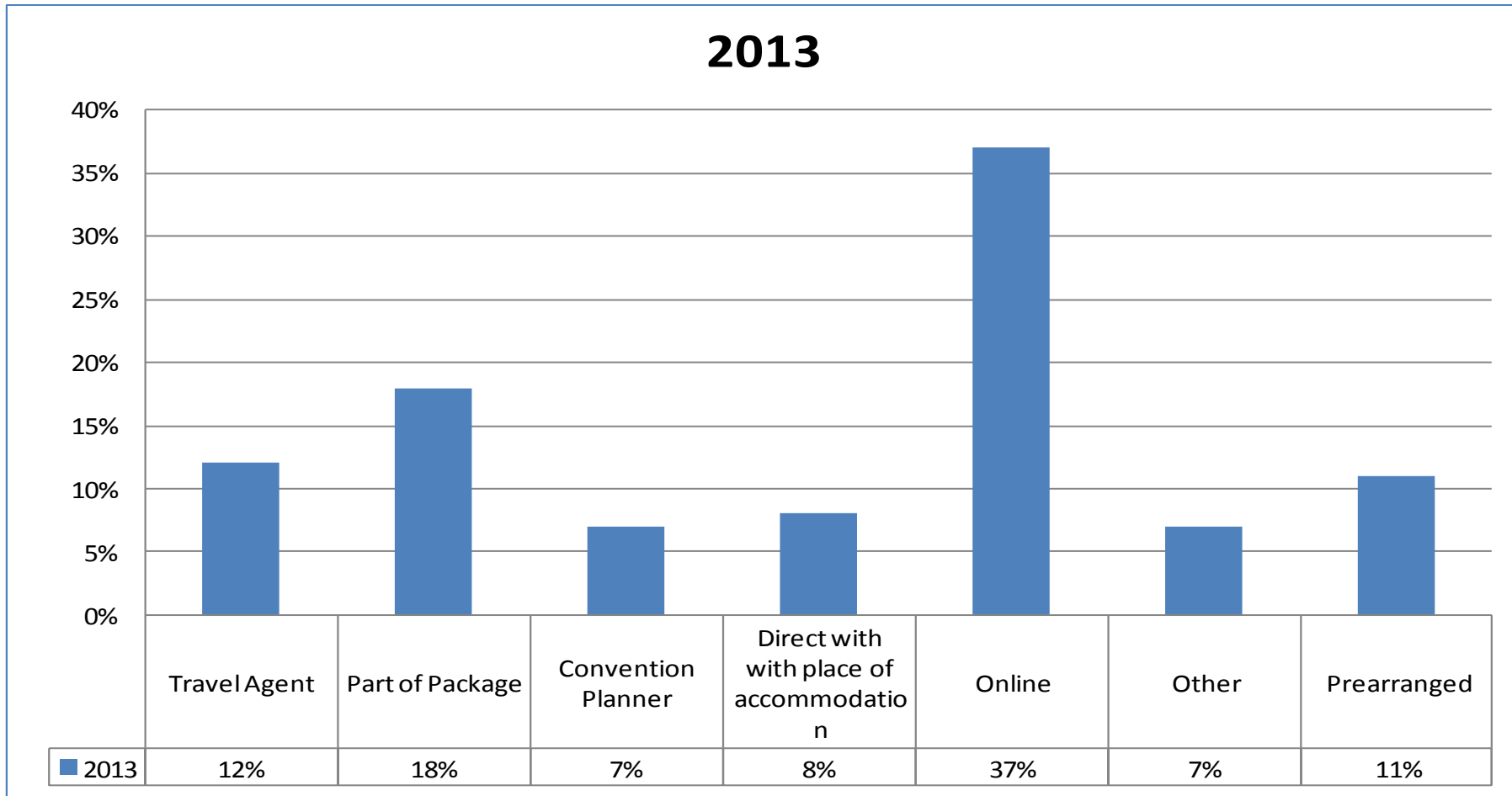
Attended Conference in South Africa Previously



Yes	71%
No	29%

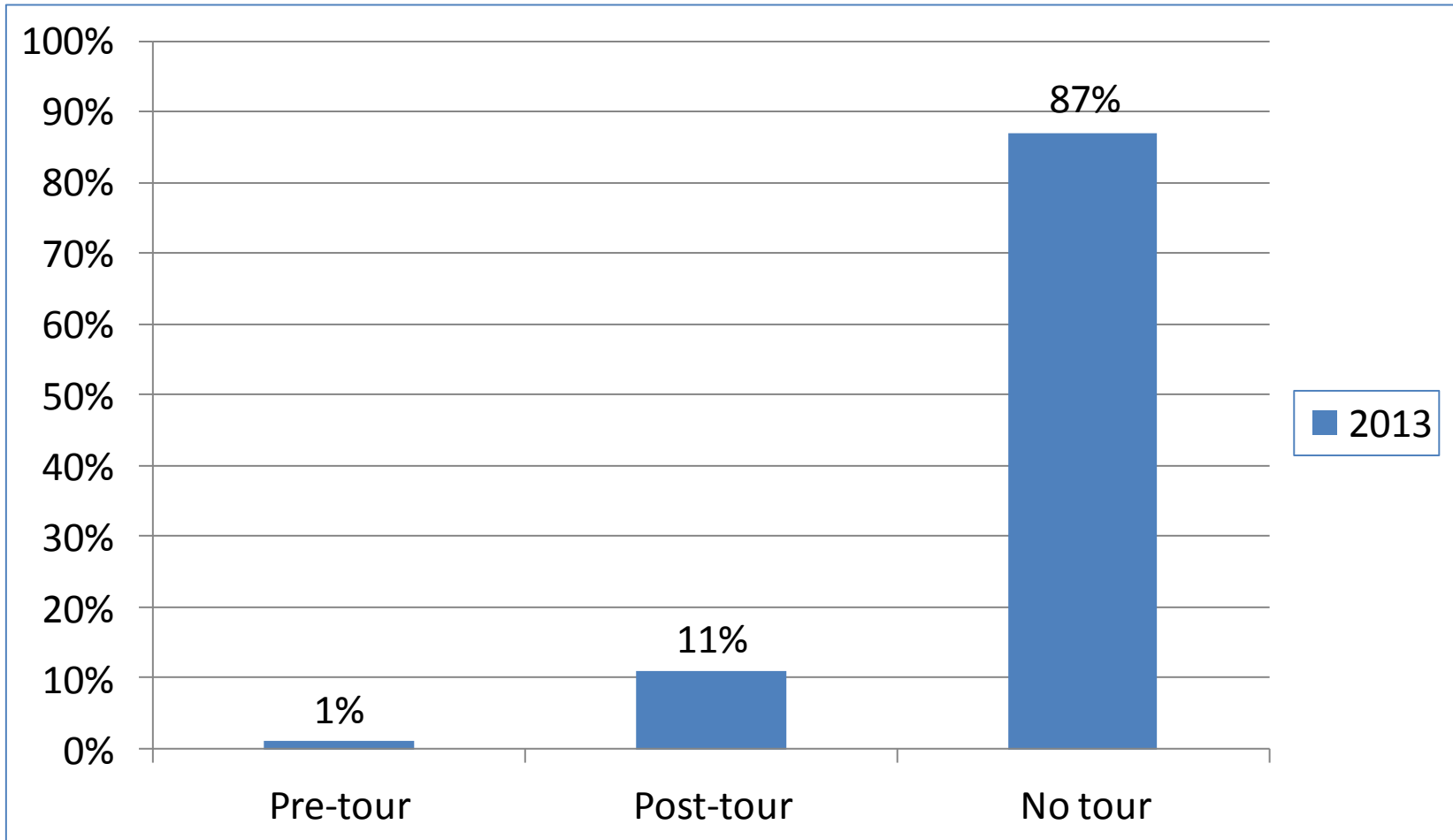
This indicated that South Africa is increasingly a popular conference destination.

Accommodation Booking Channel



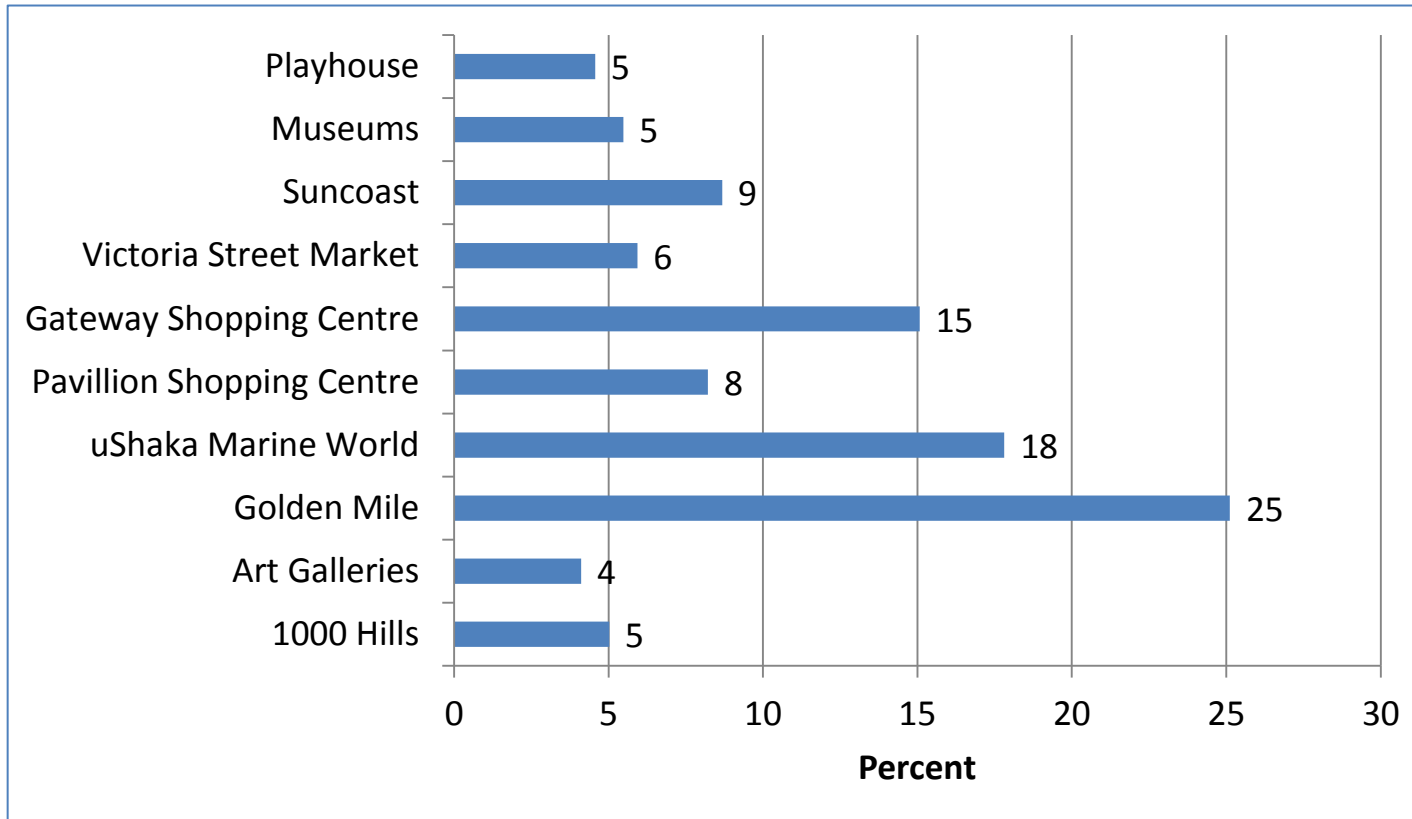
The high use of the internet to book accommodation is surprising considering that most accommodation is booked using travel agents.

Pre-and Post-Conference Tours



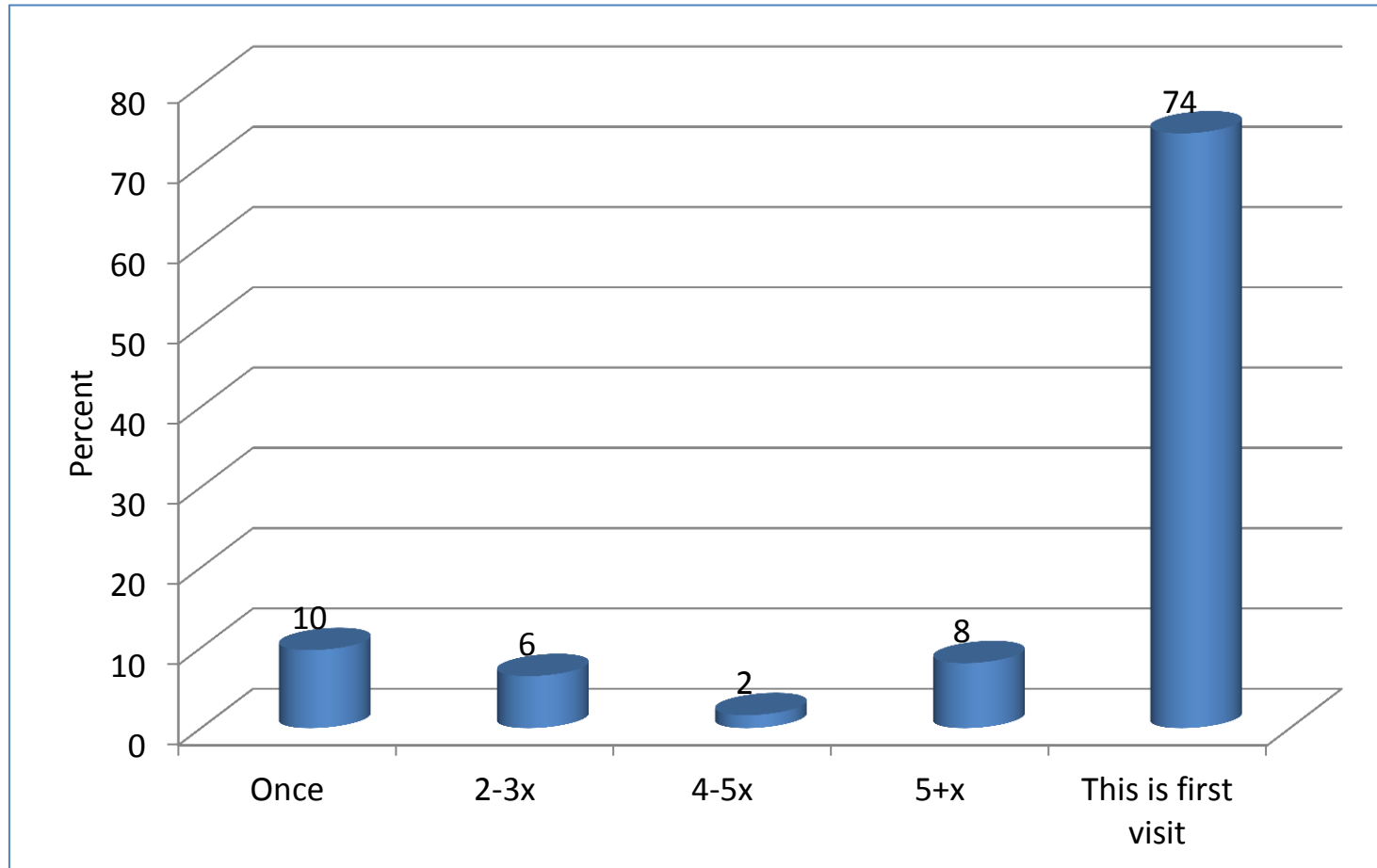
Considering that delegates only stayed on average 5.9 nights, the high incidence of no tours being taken was not surprising.

Attractions Visited*



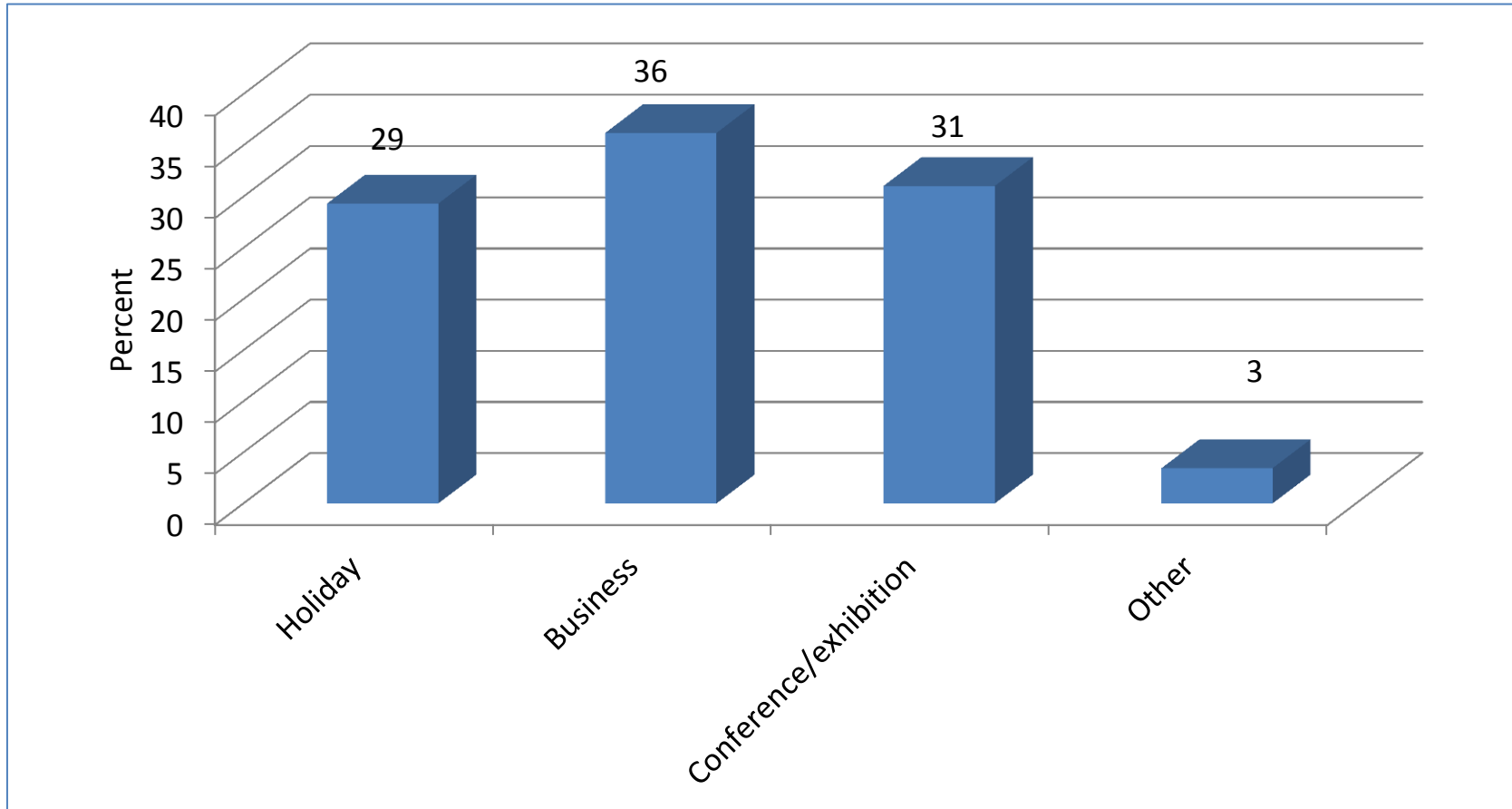
*Please note that these refer to attractions that delegates visited on their own. They do not form part of the arranged and paid for conference tours.

Durban Visits



Most of the respondents were visiting Durban for the first time. Considering that most had been to South Africa for a conference previously, indicated that most had not been to Durban for a conference.

Primary Purpose of Previous Visits



Of those who had visited Durban previously, their main purpose was for business or conferences.

Primary Purpose of Previous Visits

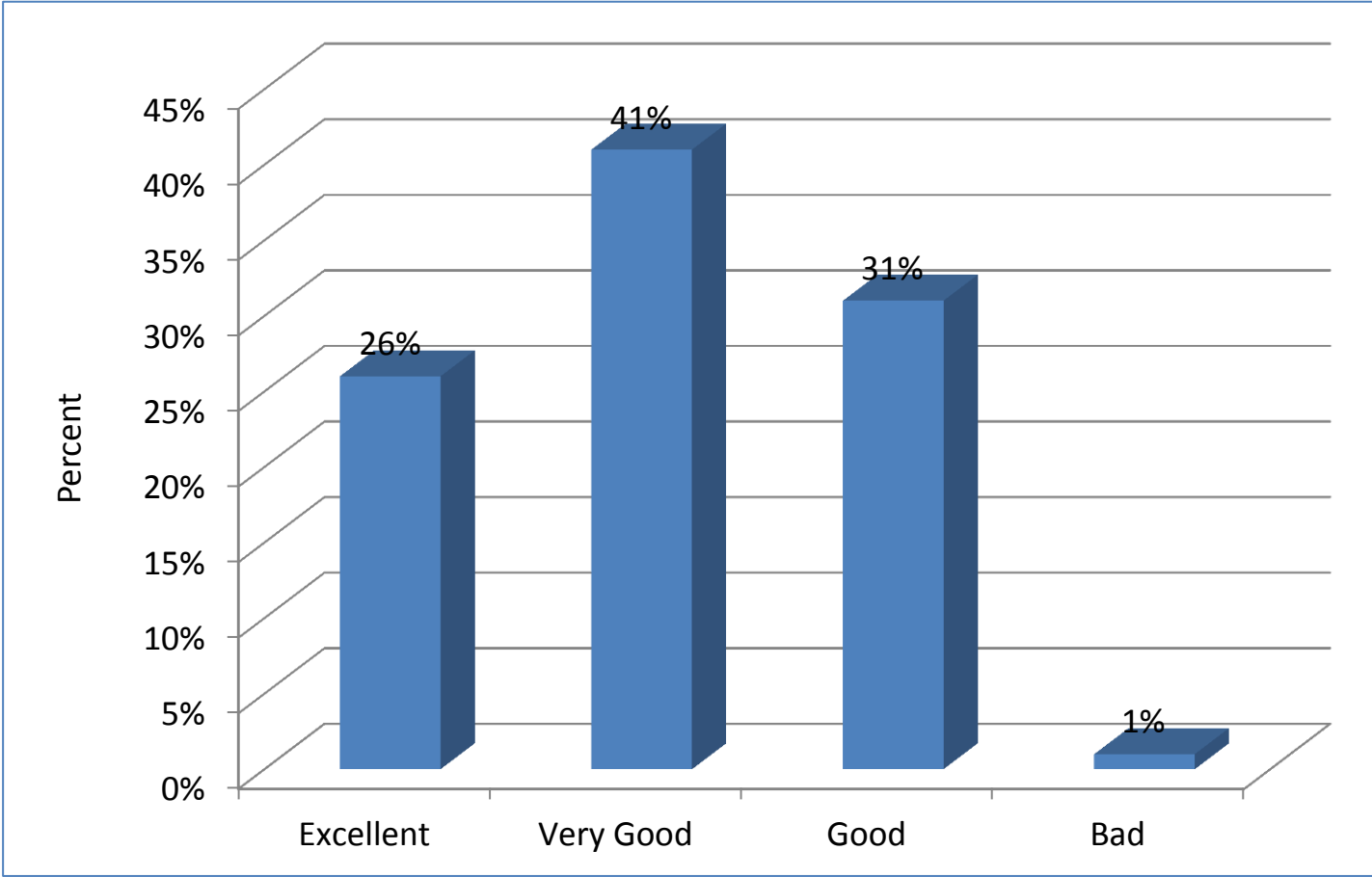
(cont'd)



	Once	2-3x	4-5x	5+x
Business	33%	33%	10%	24%
Conference/exhibition	56%	17%	11%	17%
Holiday	12%	18%	0	71
Other	0	100%	0	0

In this slide it is clear that holidays are not a big draw card for this market as yet. Therefore it is necessary to showcase what Durban has to offer in order to lure them back for leisure purposes.

Rating of Durban as a Convention Destination



Durban as a Convention Destination: Reasons for Ratings (cont'd)



Reason	Count
Conference facilities are good	72
Central located	30
Well organised	28
Efficient ICC staff, service is good	16
Able to accommodate large number of people	14
Friendly city	14
Clean	13
Beautiful city	11
Safety an issue	11
Easy to get around	9
Good food	9

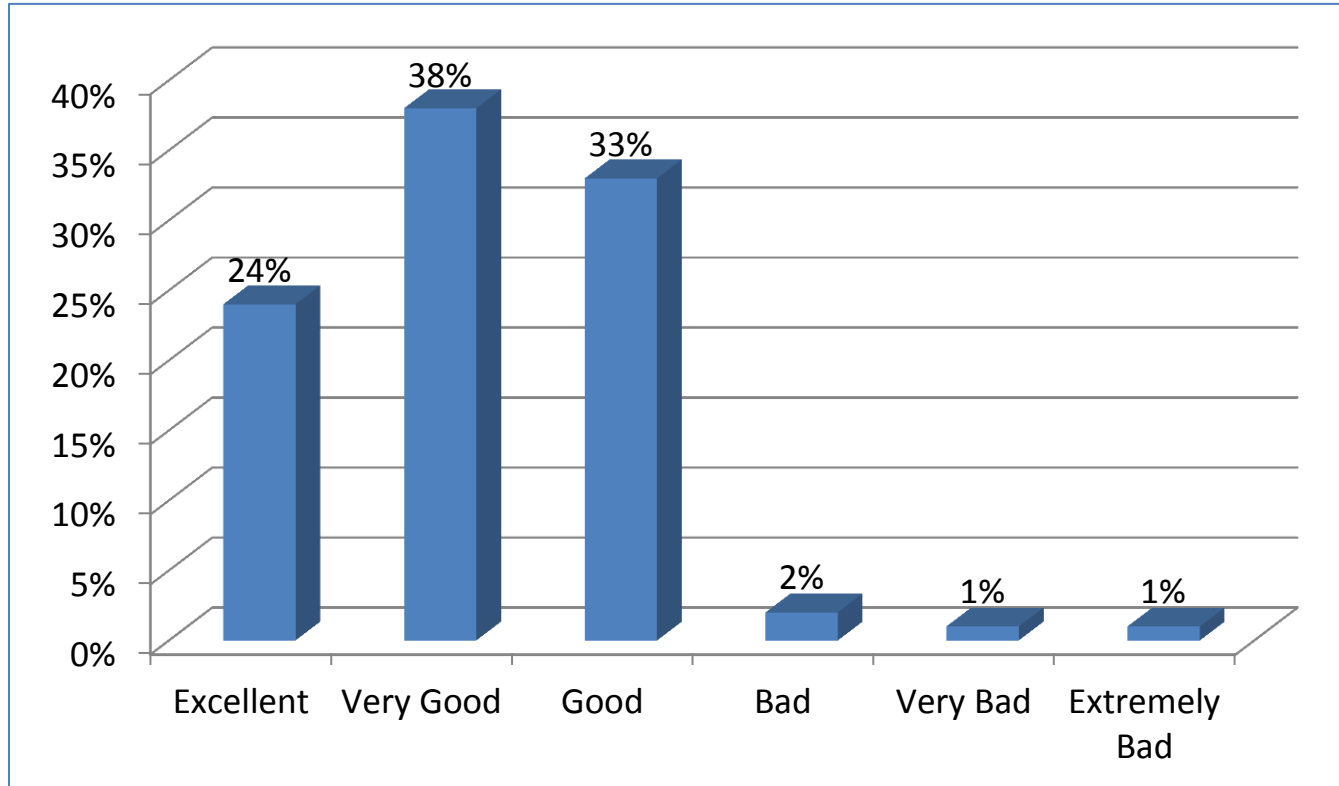
Considering this and the previous slide the ICC has been seen as a good conference facility.

Durban as a Convention Destination: Reasons for Ratings (cont'd)



Reason	Count
Enough space	6
Great infrastructure	6
Good weather	5
Hotels are good	5
Safe city	4
Durban has the best convention centre so far	3
Atmosphere is good	2
Good people	2
It is an excellent venue	2
The city has good attractions	2

Rating of Durban as a Holiday Destination



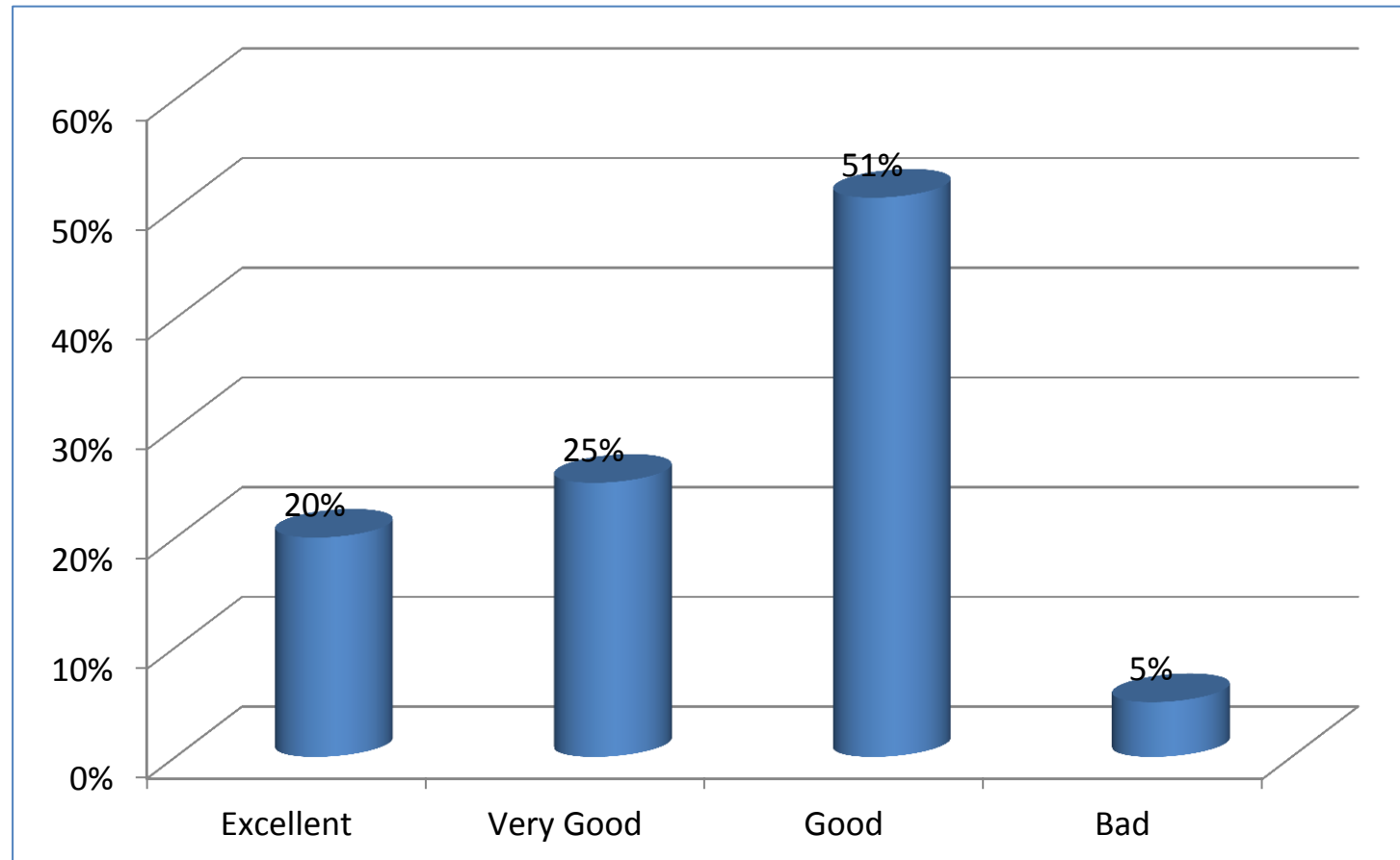
Durban has been rated as a *very good* and *good* holiday destination. This helps in encouraging delegates to return for a holiday. The respondents who rated Durban *very bad* and *extremely bad* were concerned about safety and security issues.

Durban as a Holiday Destination: Reasons for Ratings



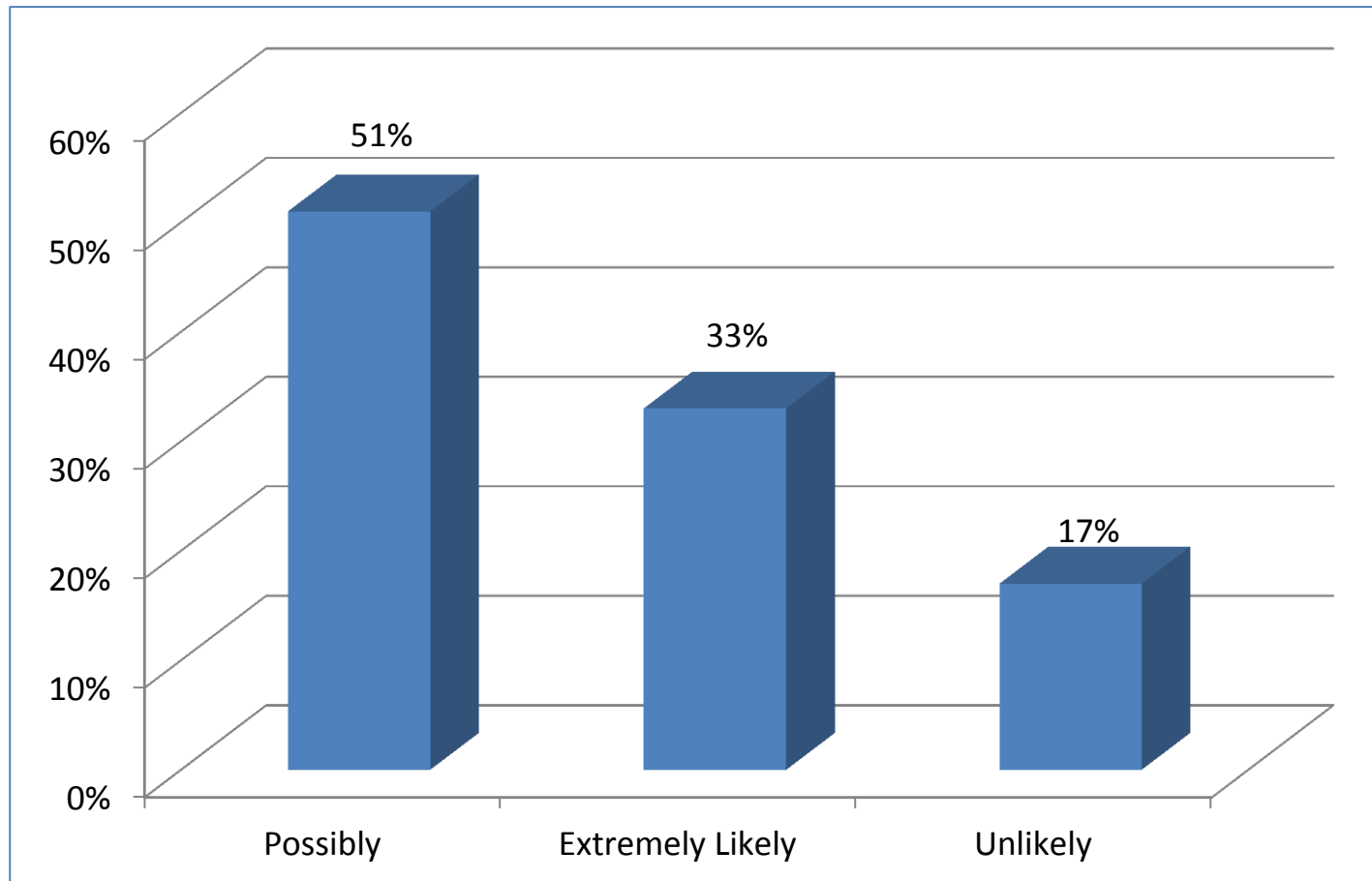
Reason	Number
Beach/sea/ocean	70
The weather/climate	66
Friendly people	24
Durban has nice/lots of attractions	23
Crime rate is high	19
Beautiful city	16
Clean	14
Culture	10
Hotels are good	6
Shopping	5
Good food	3
Good place to be	3

Rating of Durban as a Value for Money Destination



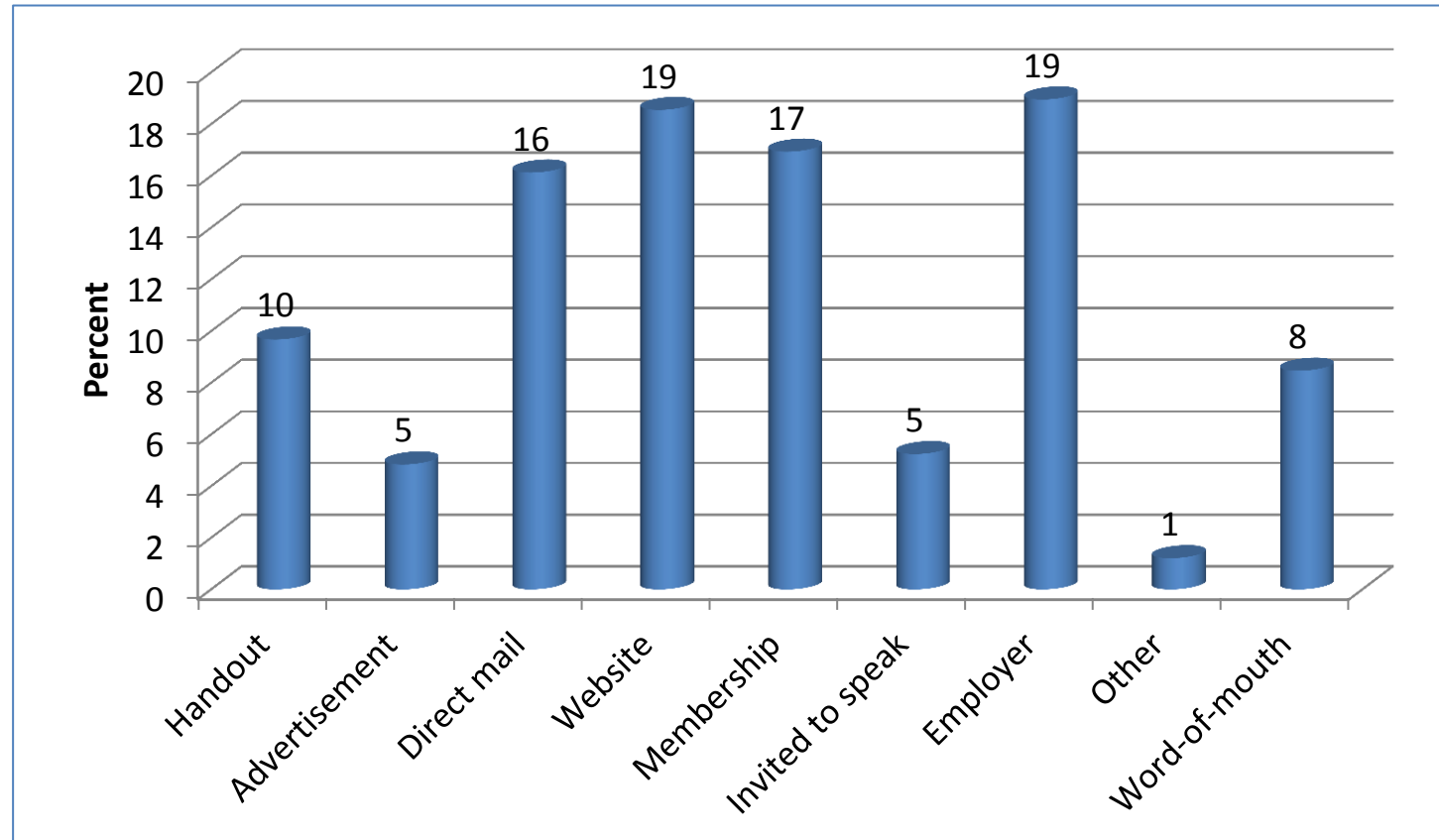
The weakness of the Rand makes South Africa a value for money destination.

Likely to Visit Durban & Surrounds in Next 5 Years?



It is encouraging to see that most delegates would possibly return to Durban in the next five years.

Convention Awareness



The delegates were made aware of this convention through the internet and their employers. Being a member of the association and direct mail was also important for this conference.

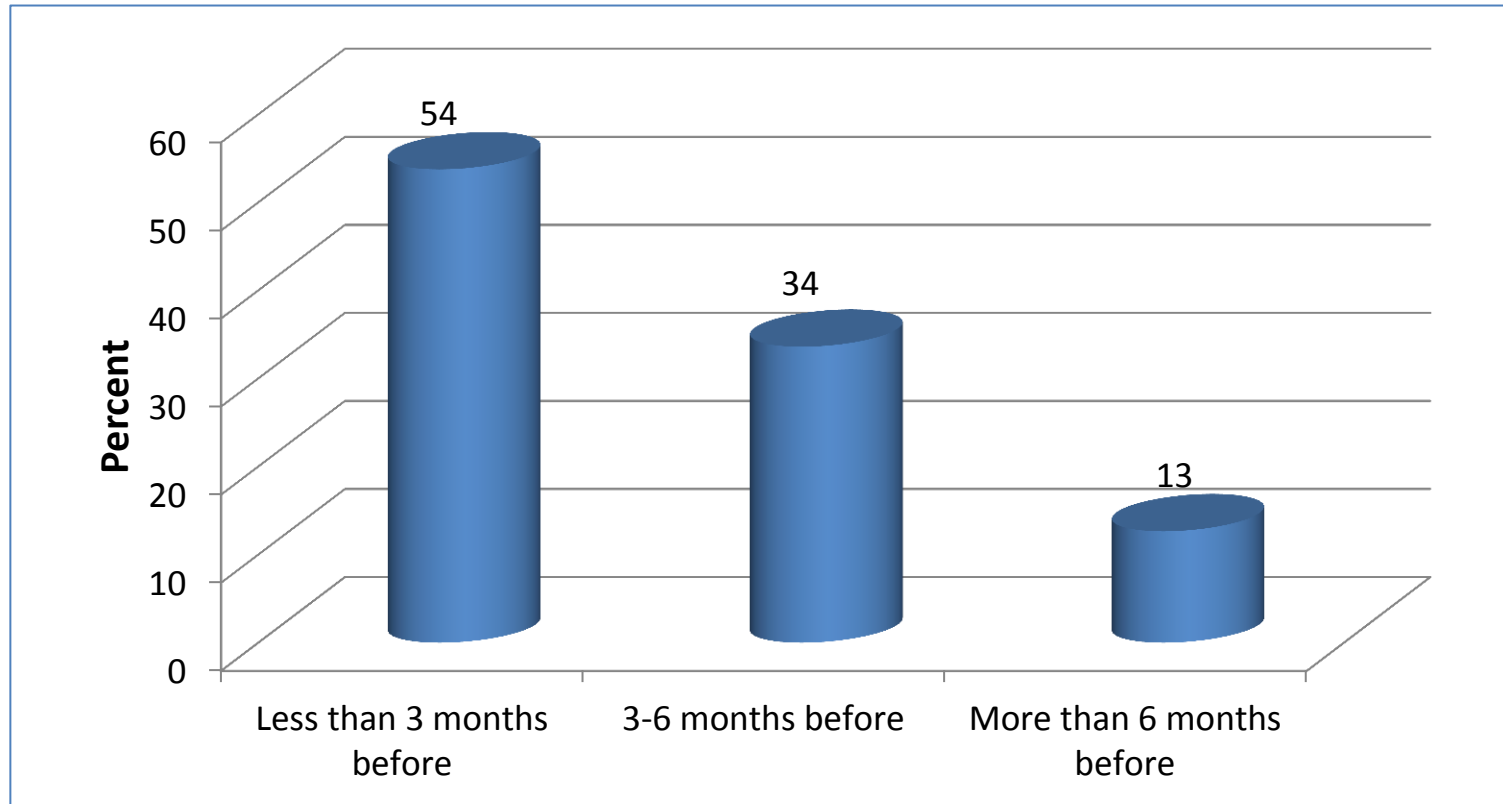
Factors that influenced decision to attend



Zulu Kingdom. Exceptional

Factors	Mentions	Percent
Topics presented at convention	96	15
Opportunity to network with business colleagues	88	14
Employer decision	81	13
Invited to attend	73	12
Speaker at/organiser of convention	43	7
Sponsorship/availability of funding	38	6
Membership of group holding convention	34	5
South Africa's culture/heritage	28	4
South Africa's weather	27	4
South Africa's beaches	24	4
Other	15	2
South Africa as a holiday destination	15	2
Social events and other arrangements	14	2
South Africa's wildlife scenery	12	2
Travel time to Durban	10	2
Durban & surrounds as a holiday destination	9	1
South Africa's shopping	8	1
South Africa's adventure	7	1
Low registration cost	4	1

When Registered



Most delegates registered less than 3 months before the conference. This may have something to do with employer approval, in the context of employers having the greatest influence on delegates to attend.

Satisfaction Levels: Convention Related Issues (Scale of 1 – 6) 6 = Very Satisfied



Mean		
	Overall	International
Accommodation quality and service	4.8	4.9
ICC decoration and fittings	5.1	5.1
Meeting rooms	5.1	5.1
Food and beverages	4.8	4.9
ICC service	4.9	4.9
Technical equipment	4.8	4.7
Convention programme	4.8	4.8
Overall satisfaction	5.0	4.9

Satisfaction Levels: Durban and Surrounds as a Tourist Destination (Scale of 1 – 6)

6 = Very Satisfied



Mean		
	Overall	International
Access	4.4	4.4
Reception in South Africa (respondents from outside of SA only)	-	4.3
Safety	3.9	3.8
Cleanliness	4.6	4.7
Banking	3.3	3.1
Sightseeing	2.8	2.7
Public Transport	3.6	3.6
Restaurants	4.6	4.5
Price of accommodation	3.8	3.8

The rating of sightseeing by the delegates is low. This is not unexpected when 87% of the delegates did not go on any tours.

Estimated Economic Impact: Conference Delegates



	2013	
	Foreign	Domestic
Mean	R7 644	R5 233
Estimated direct spend	Between R7 299 108 and R10 019 295	
Estimated total spend (multiplier of 1.42)	Between R10 364 733 and R14 228 293	
Estimated total spend (multiplier of 2)	Between R14 458 216 and R20 038 790	

Estimated Economic Impact: Organizer Spend



Conference logistics	
Food and beverages	Included in venue hire
ICC hire	R6.4mn

Rating Aspects of the Conference

Topic	Mean
Improvement of your knowledge and expertise in your field	4.9
Commitment to the environment	4.5
Commitment to social responsibility	4.4
Exposed to new insights and ideas	5.0
Focused on latest research and practical applications	5.1
Led to dissemination of new knowledge	5.1
Enabled the international community to focus on global and domestic issues.	4.8
Resulted in the creation of business and/or research relationships	4.8
Opportunities for business and/or research collaboration	4.8

The rating of the conference as highlighted above, provides an indication that the conference was successful in these terms.

Rating the Outcomes of the Conference



Topic	Agree	Disagree	Unsure
Share information gained with colleagues and peers	99%	1%	-
Apply the new insights to professional practice	95%	2%	3%
Share information gained with students	76%	13%	10%
Form or strengthen collaborations with researcher and/or practitioners from the conference destination	87%	3%	10%
Form new collaborations with international researchers and/or practitioners	85%	3%	12%
Strengthen advocacy and/or policy work	83%	7%	11%
Refine existing research	86%	4%	10%
Apply new insights to research programs	90%	4%	6%
Undertake new research	83%	6%	11%

Conclusion/Main Findings



1. The majority of respondents, 85%, were international delegates. This is significant because of the exposure that the Durban will gain from a largely international conference.
2. A large proportion of the respondents were between the ages of 30-39 (35%) and 40-49 (30%).
3. In terms of gender, the respondents were mainly male (61%) while the rest were female (39%).
4. The 4 (50%) and 3-star (23%) followed by 5 star (16%) hotels were the most utilised form of accommodation.
5. The respondents stayed for an average of 5.9 nights for the conference. Thus it seemed as though the respondents spent the night before and after the conference in Durban.
6. Many respondents (37%) booked their accommodation online. This is a shift from previous conferences where booking through a travel agent is the most popular method.
7. 74% of the respondents indicated that this was the first time in Durban. In relation to point 1 above, this event has created good exposure for Durban, which can probably translate into future visits.

Conclusion/Main Findings



8. 72% of the respondents rated Durban as a *very good* or *good* convention destination.
9. 71% of the respondents indicated that Durban was a *very good* or *good* holiday destination.
10. 76% of the respondents indicated that Durban was a *very good* or *good* value for money destination.
11. 51% of the respondents indicated that there is a possibility that they would visit Durban in the next 5 years. In the context of 85% of the respondents being international delegates this bodes well for Durban.
12. 54% of the respondents indicated that they registered within 3 months before the conference.

Conclusion/Main Findings (cont'd)



13. The respondents were asked as to which factors influenced their decision to attend the conference/exhibition. The top 4 factors mentioned were as follows:
 - Topics presented at the conference (96 mentions)
 - Opportunity to network (88 mentions)
 - Employer decision (81 mentions)
 - Invited to attend (73 mentions)
14. Respondents were asked to rate their degree of satisfaction with various aspects of the convention. This was on a scale of 1-6 where 1 denoted very unsatisfied and 6 represented the highest level of satisfaction i.e. very satisfied. Overall the ratings were positive with an average satisfaction rating of 5.0.
15. When asked to rate their satisfaction levels of Durban and surrounds sightseeing was rated the lowest by both local and international delegates. This may be as a result of a lack of opportunity of sightsee. The issue of security that was mentioned in slide 18 may have an impact of delegates wanting to sightsee.

Recommendations



The following recommendations are based on the findings which were discussed in the previously:

1. The perception of a security problem is still prevalent. Organizers of conference need to engage the city and hotels to overcome this perception.
2. Sightseeing was rated lowest. Sightseeing opportunities should be made available for delegates to purchase before or after the conference.