Sports & Events Tourism Exchange

Exhibition & Conference

22-23 October 2013

Top Line Summary

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March 2014

Highlights

- 66% of the respondents stayed in 4 and 5 star hotels.
- 81% of the respondents rated Durban as a **very good** or **excellent** convention destination.
- 81% of the respondents rated Durban as a **very good** or **excellent holiday** destination.
- The economic impact of the event was estimated to be between R877 000 and R2mn.

Objectives

- To determine the profile of delegates who attended the Sports and Events Tourism Exchange: Exhibition and Conference on 22-23 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.

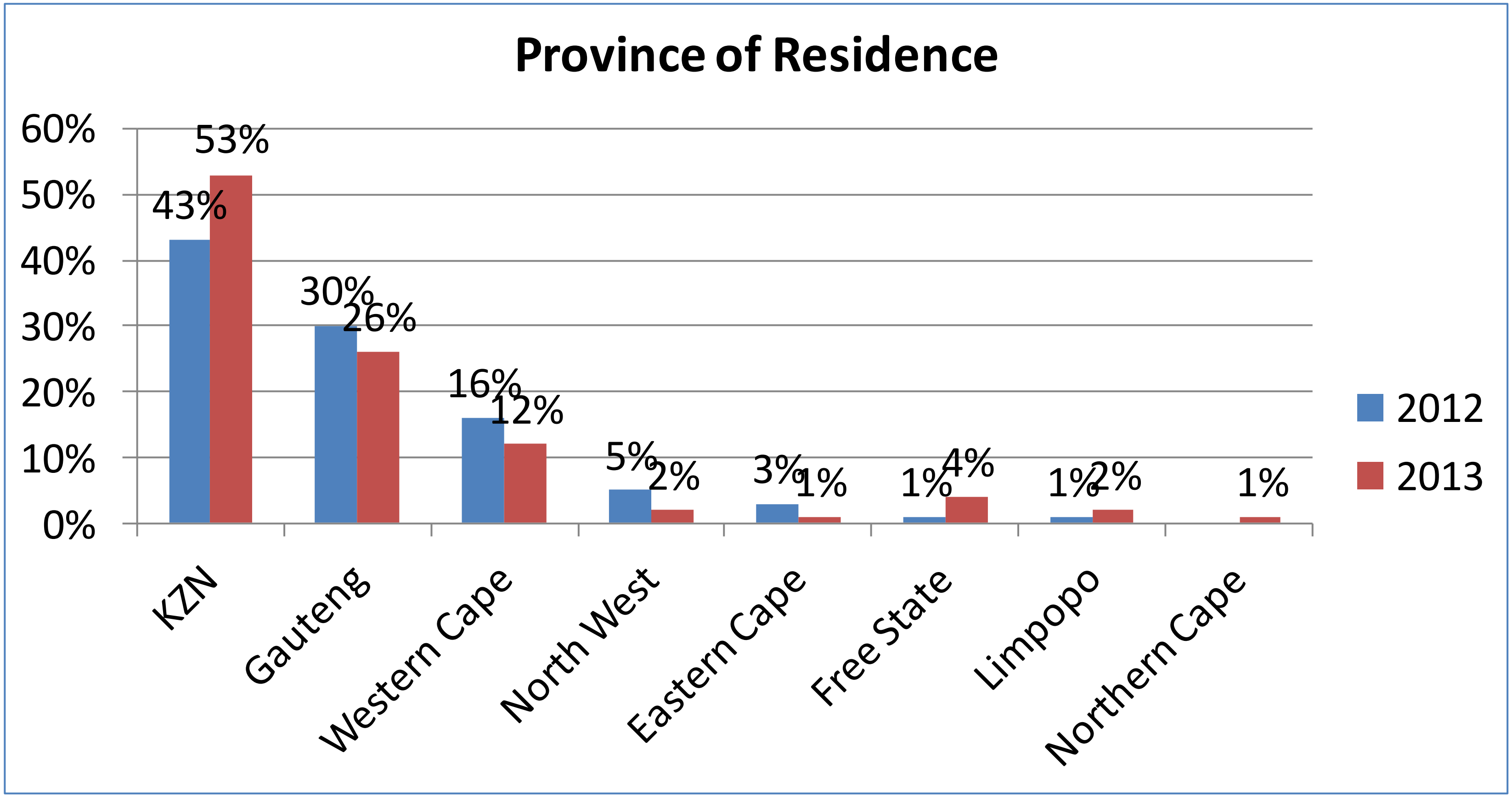
Methodology

- Face to face survey – 137 respondents.
- Probability sample design.
- Stratified allocation by day.
- Respondents systematically selected.
- Secondary data provided by the organizers.

Limitations:

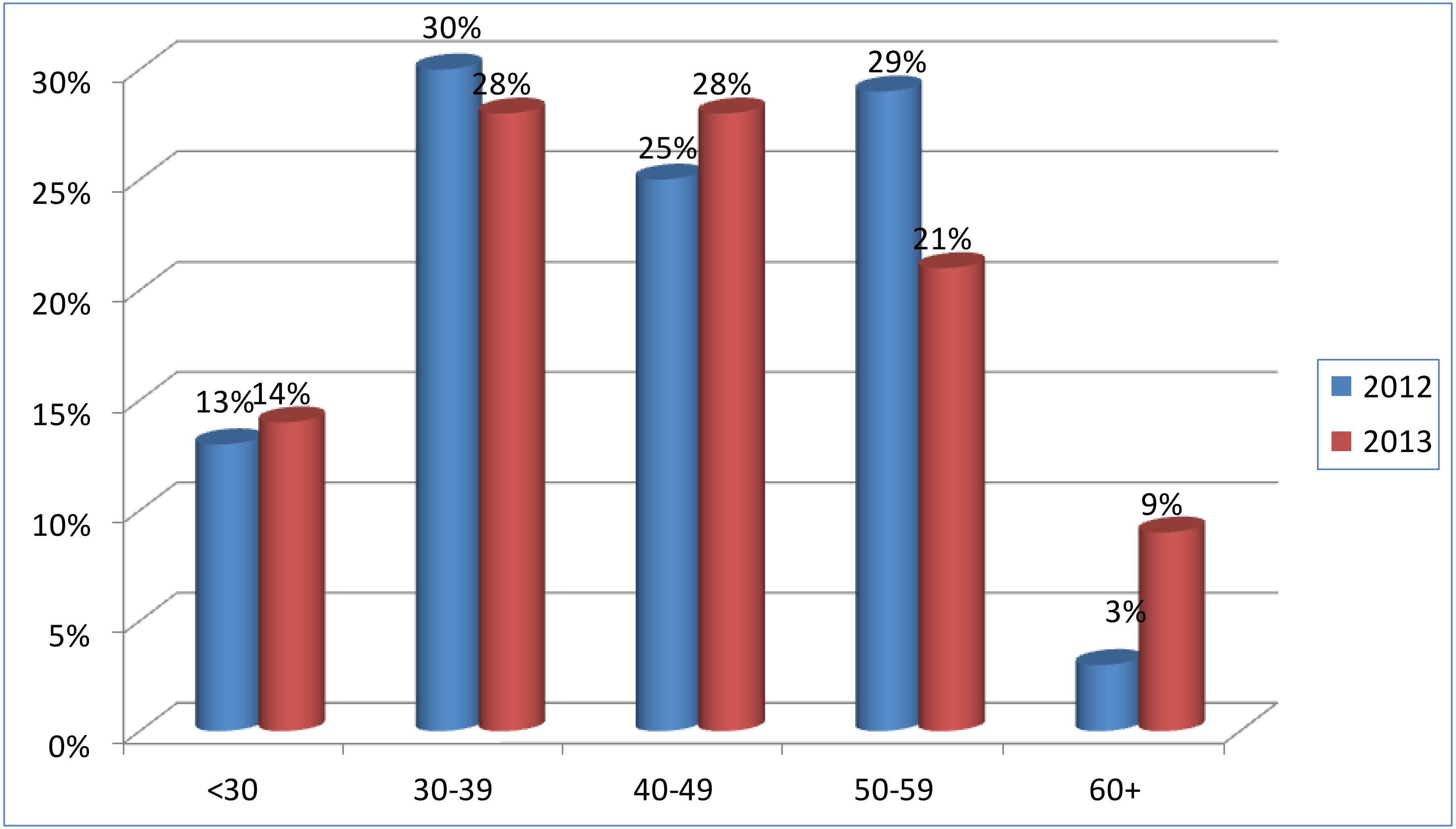
- The proportion of foreign respondents was too small to derive any statistically significant outcomes.
- This survey was only based on respondents who were regarded as conference delegates and excluded exhibitors.
- The results of this survey indicate the estimated total impact based on the spend of the conference delegates and visitors to the exhibition.

Domestic Respondents

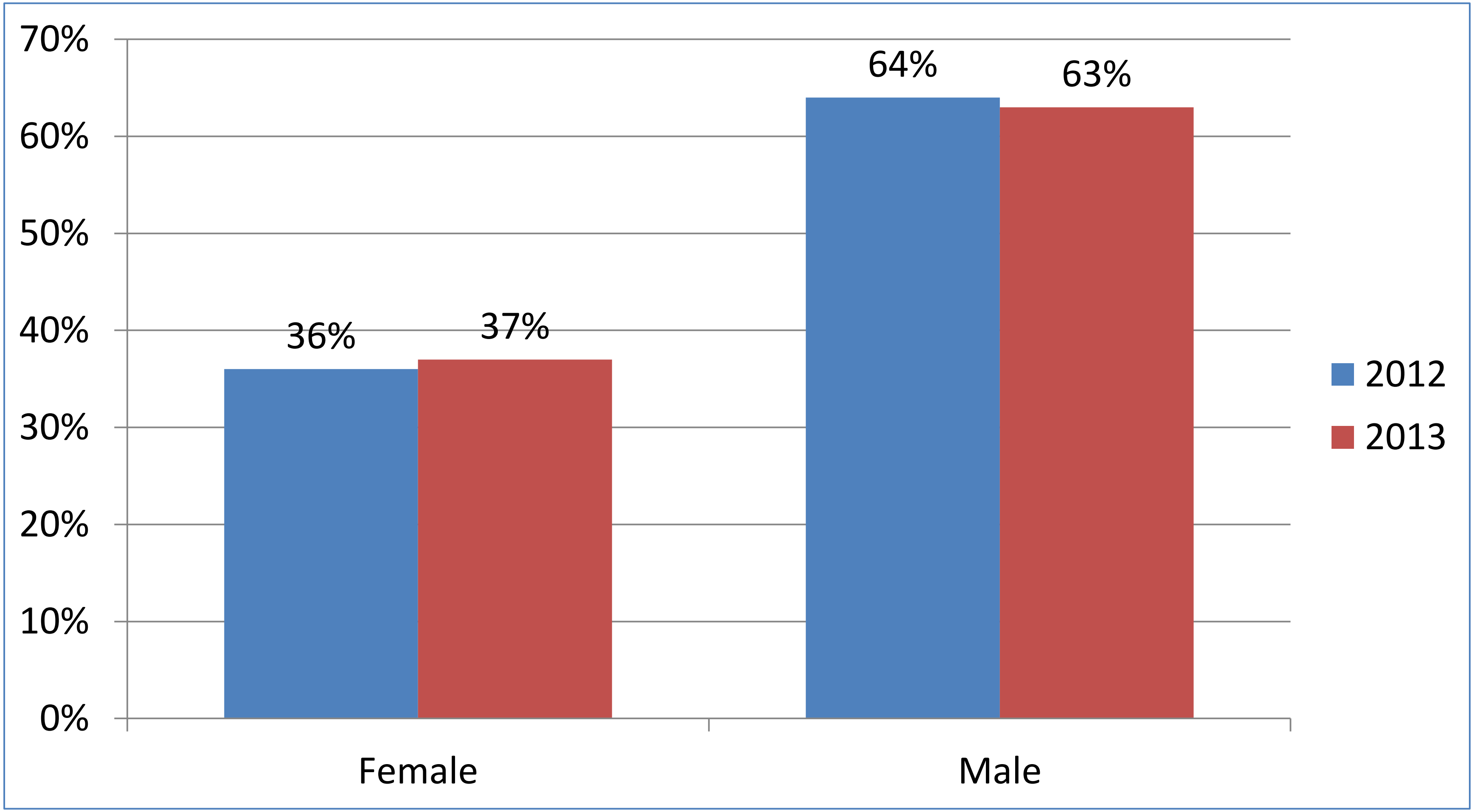


Respondents	2012		2013	
South African	76	86%	109	80%
Foreign	12	14%	28	20%
Total	88	100%	137	100%

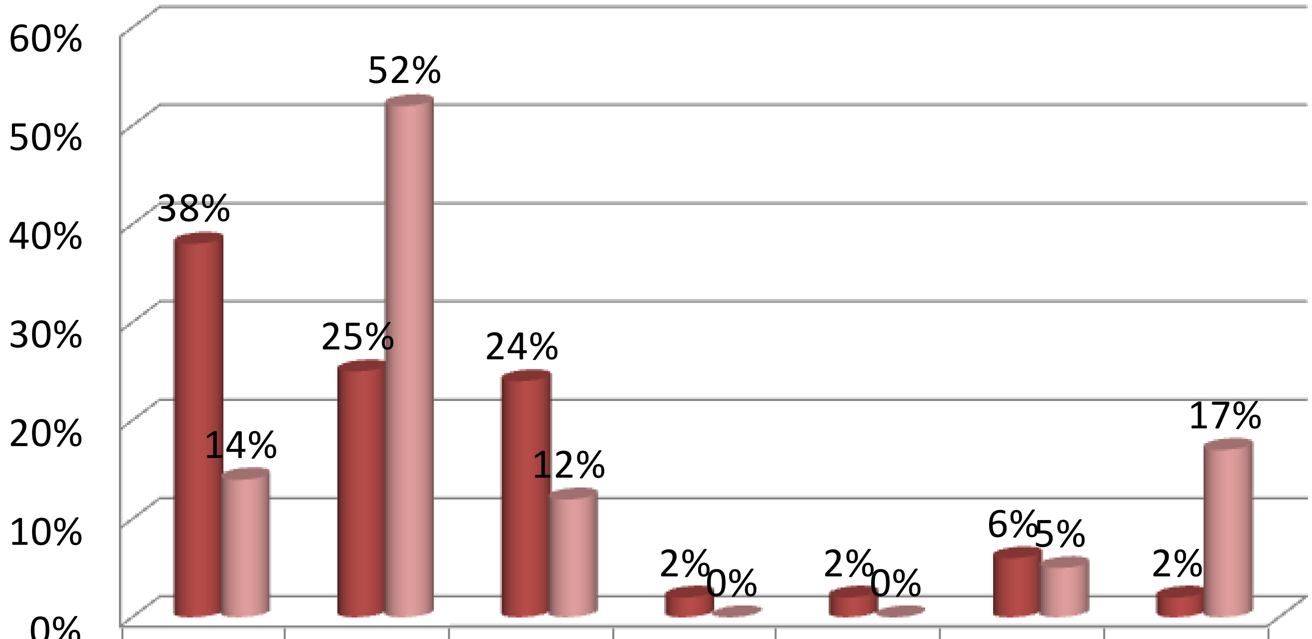
Age Group of Respondents



Respondents’ Gender



Accommodation All Respondents



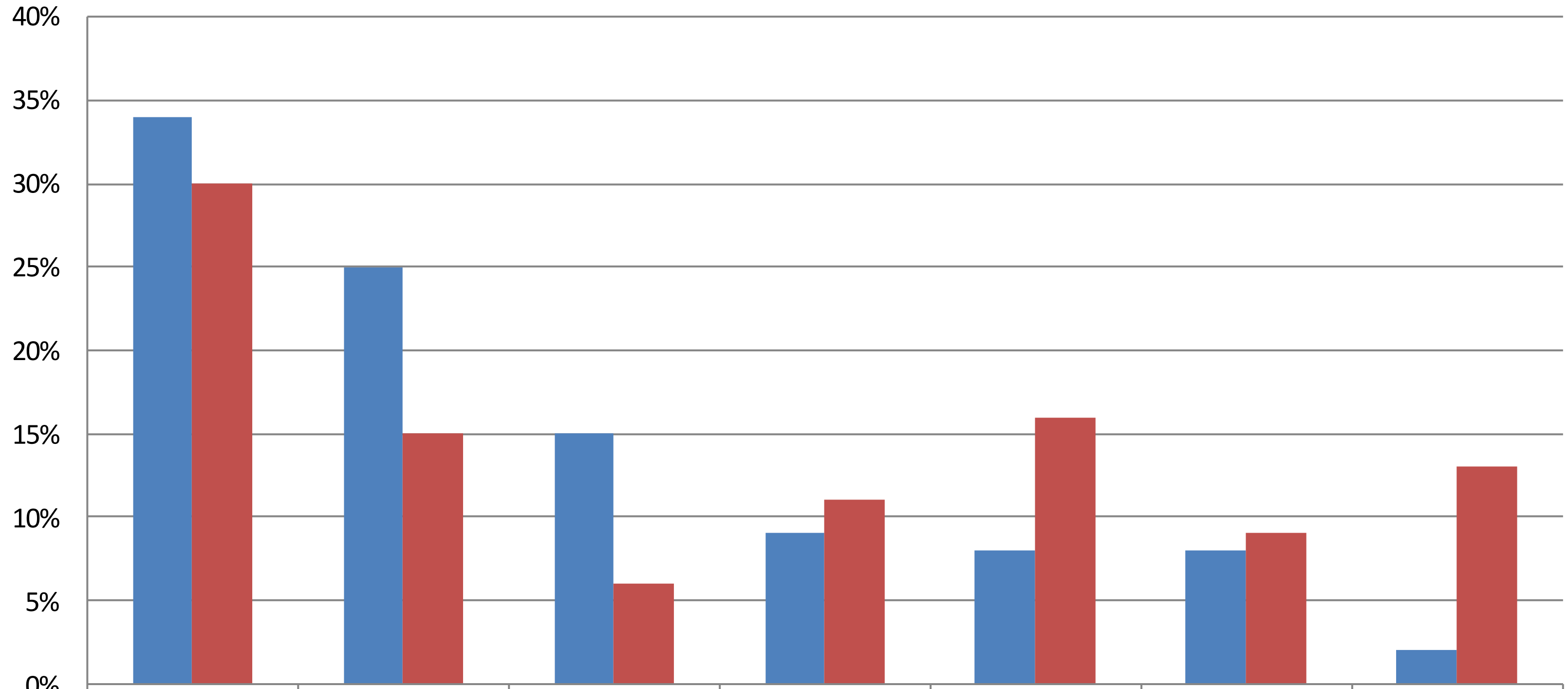
	5 star hotel	4 star hotel	3 star hotel	Guest house	B&B	Family/ friends	Other
2012	38%	25%	24%	2%	2%	6%	2%
2013	14%	52%	12%	0%	0%	5%	17%

Length of Stay: Average Nights

2012	2013
3.5	3.1

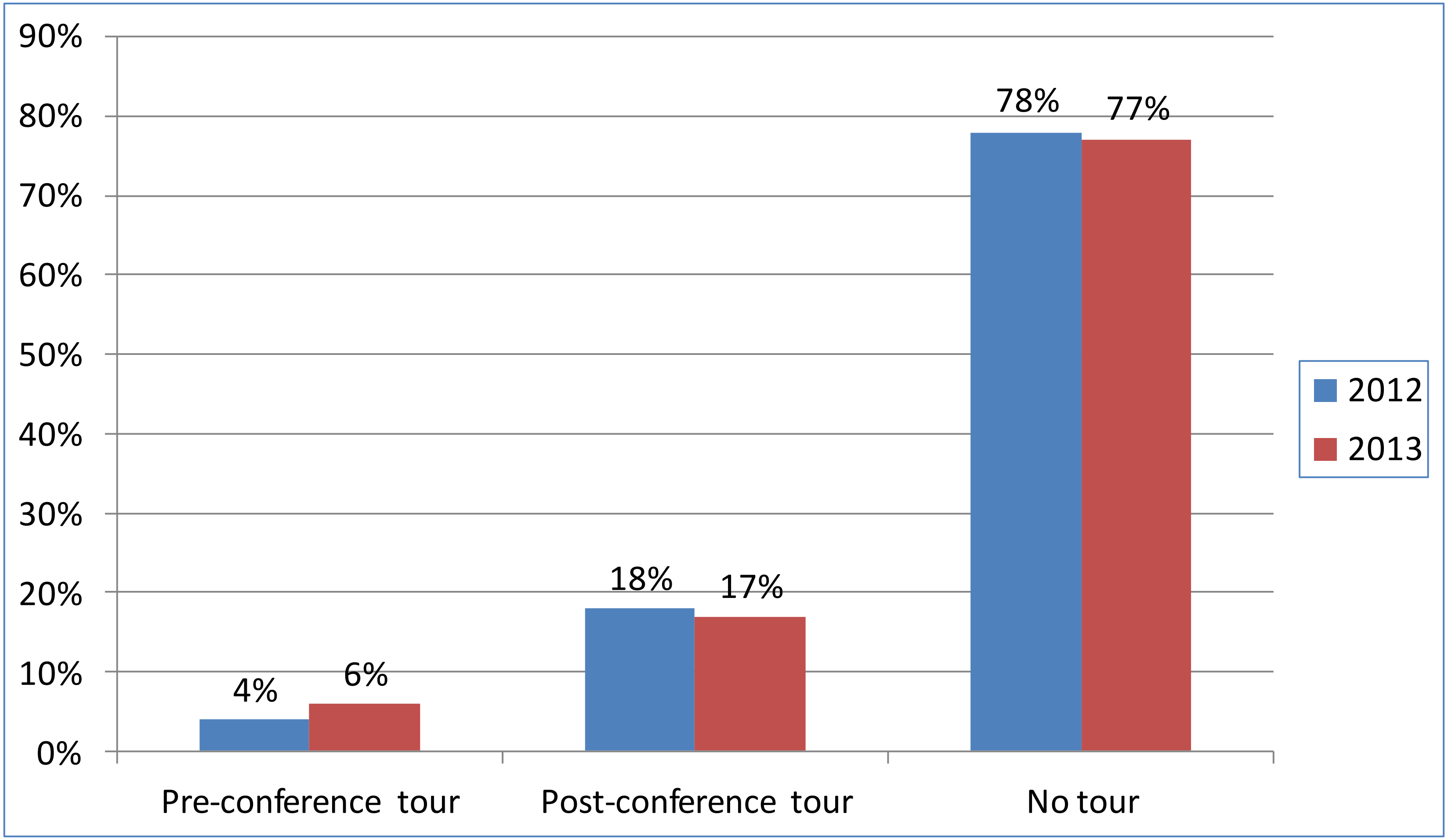
The average length of stay was 3.1 nights in 2013, slightly down from 3.5 in 2012. The conference is two days, therefore most delegates seem to stay for the duration of the conference only.

Accommodation Booking Channel

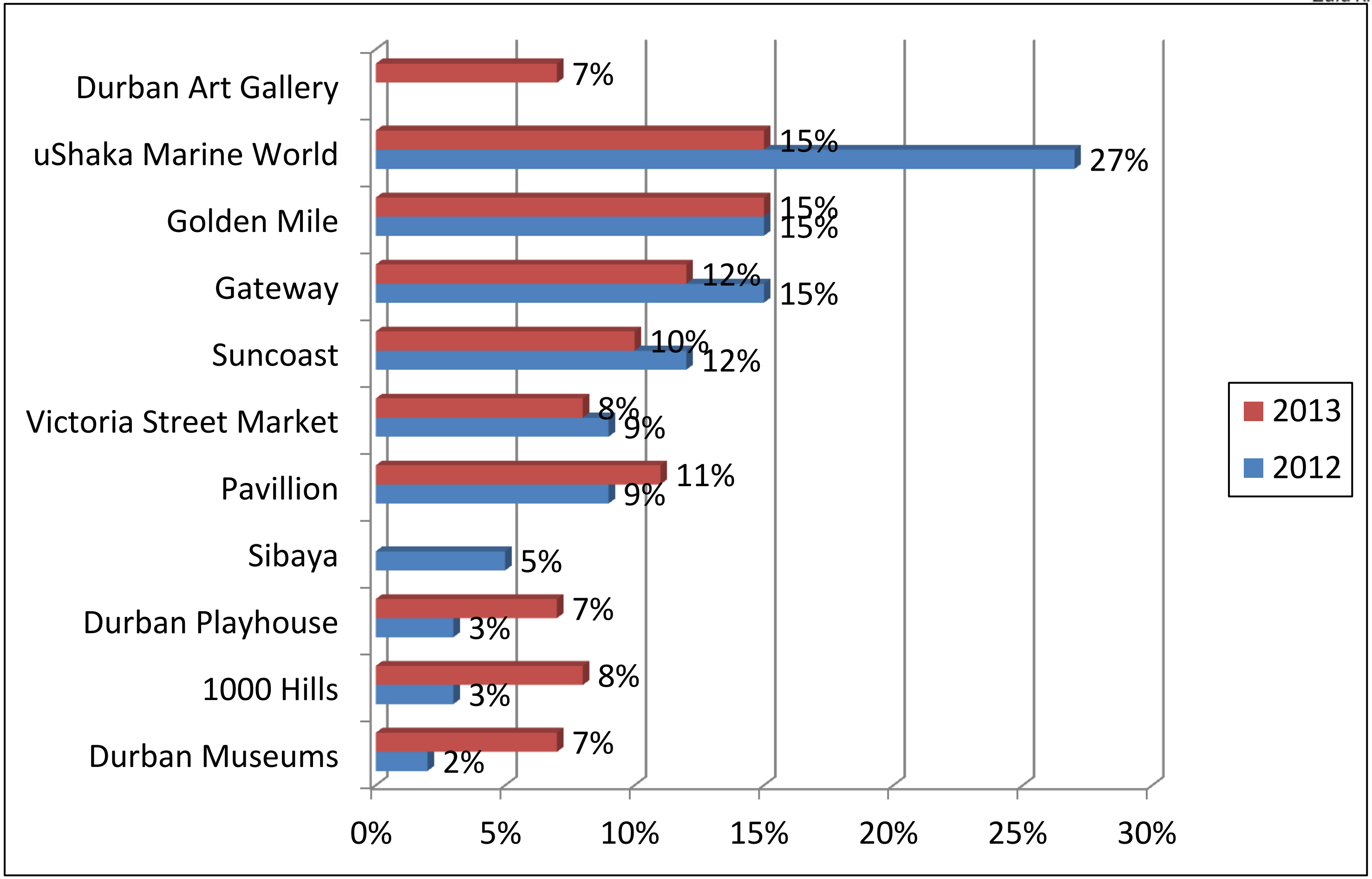


	Travel Agent	Part of Package	Convention Planner	Direct with with place of accommodation	Online	Other	Prearranged
2012	34%	25%	15%	9%	8%	8%	2%
2013	30%	15%	6%	11%	16%	9%	13%

Pre and Post-Conference Tours

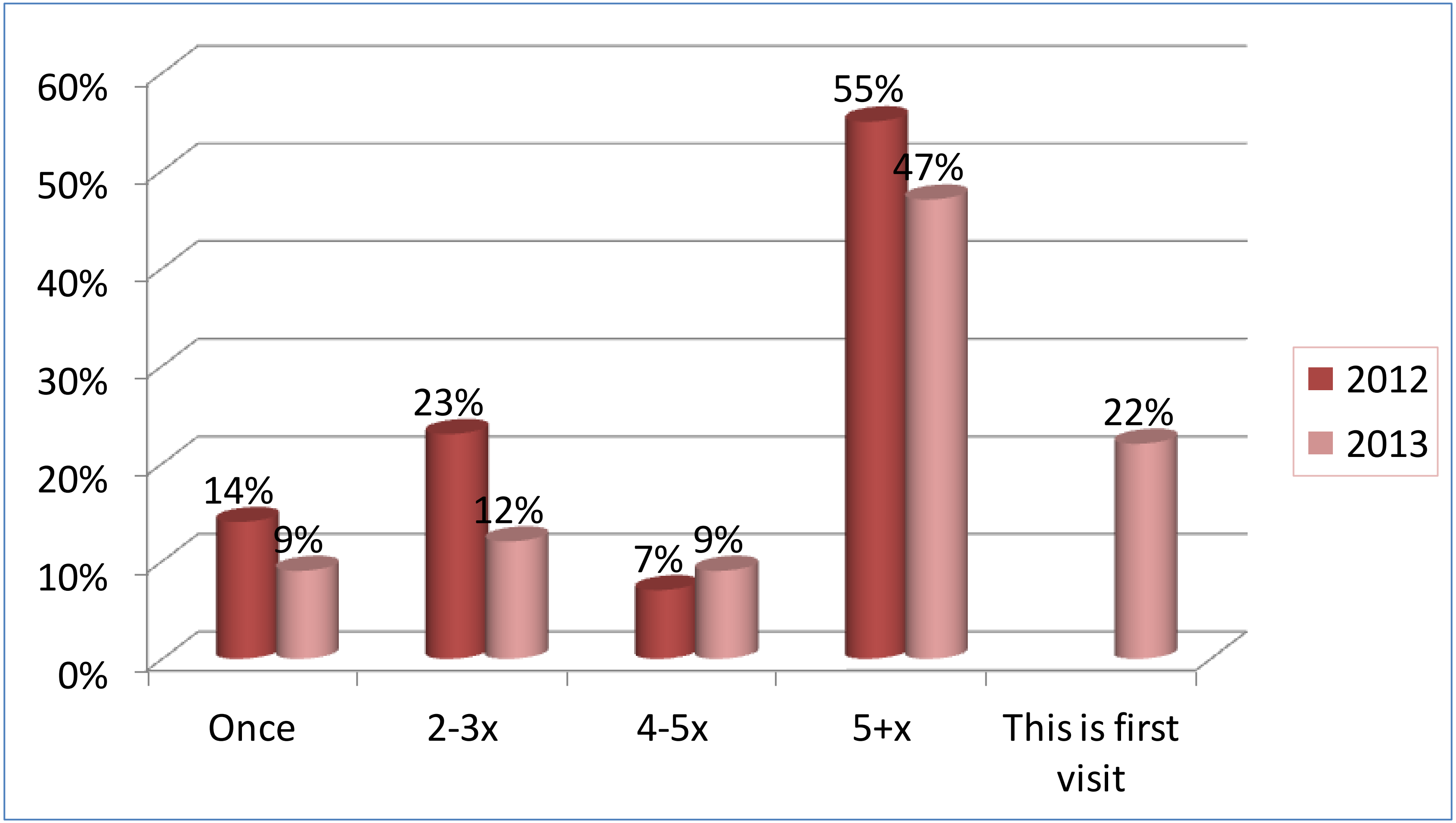


Attractions Visited*

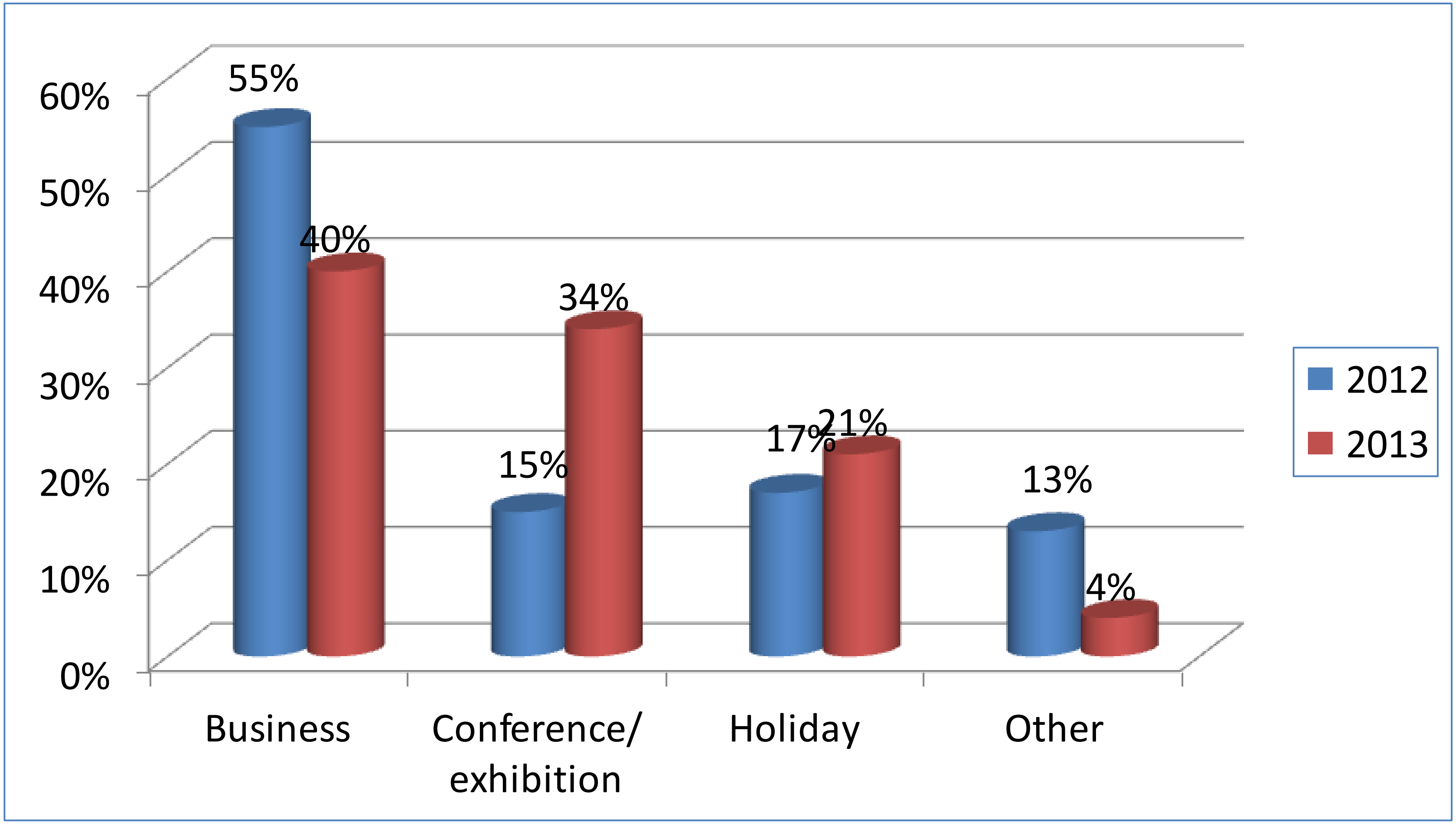


*Please note that these refer to attractions that delegates visited on their own. They do not form part of the arranged and paid for conference tours.

Durban Visits



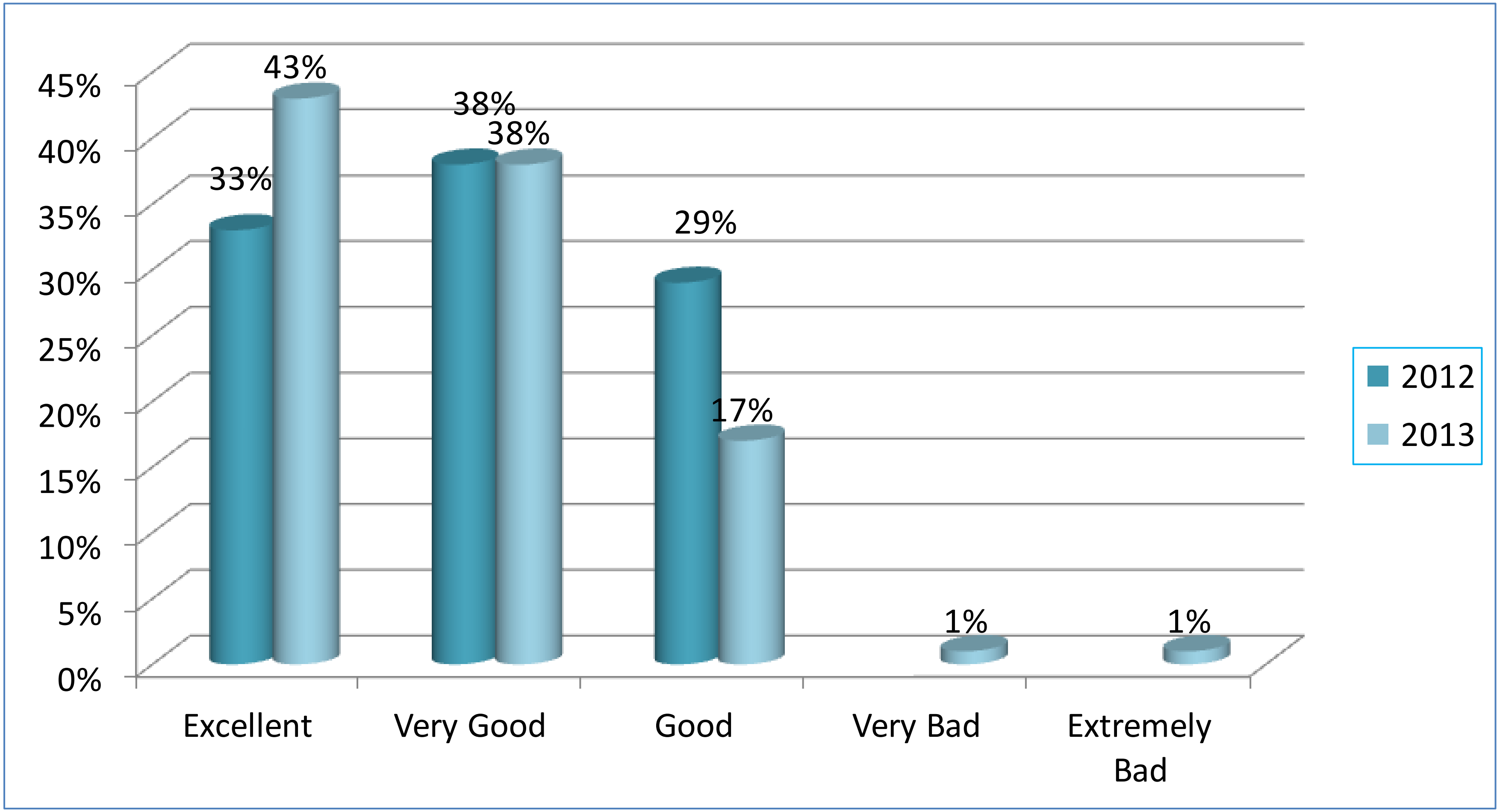
Primary Purpose of Previous Visits



Primary Purpose of Previous Visits
(cont'd)

	2-3x		4-5x		5+x	
	2012	2013	2012	2013	2012	2013
Business	46%	46%	75%	57%	57%	39%
Conference/exhibition	23%	27%	-	29%	13%	32%
Holiday	31%	18%	-	14%	13%	24%
Other	-	9%	25%	-	17%	5%
Total	100%	100%	100%	100%	100%	100%

Rating of Durban as a Convention Destination



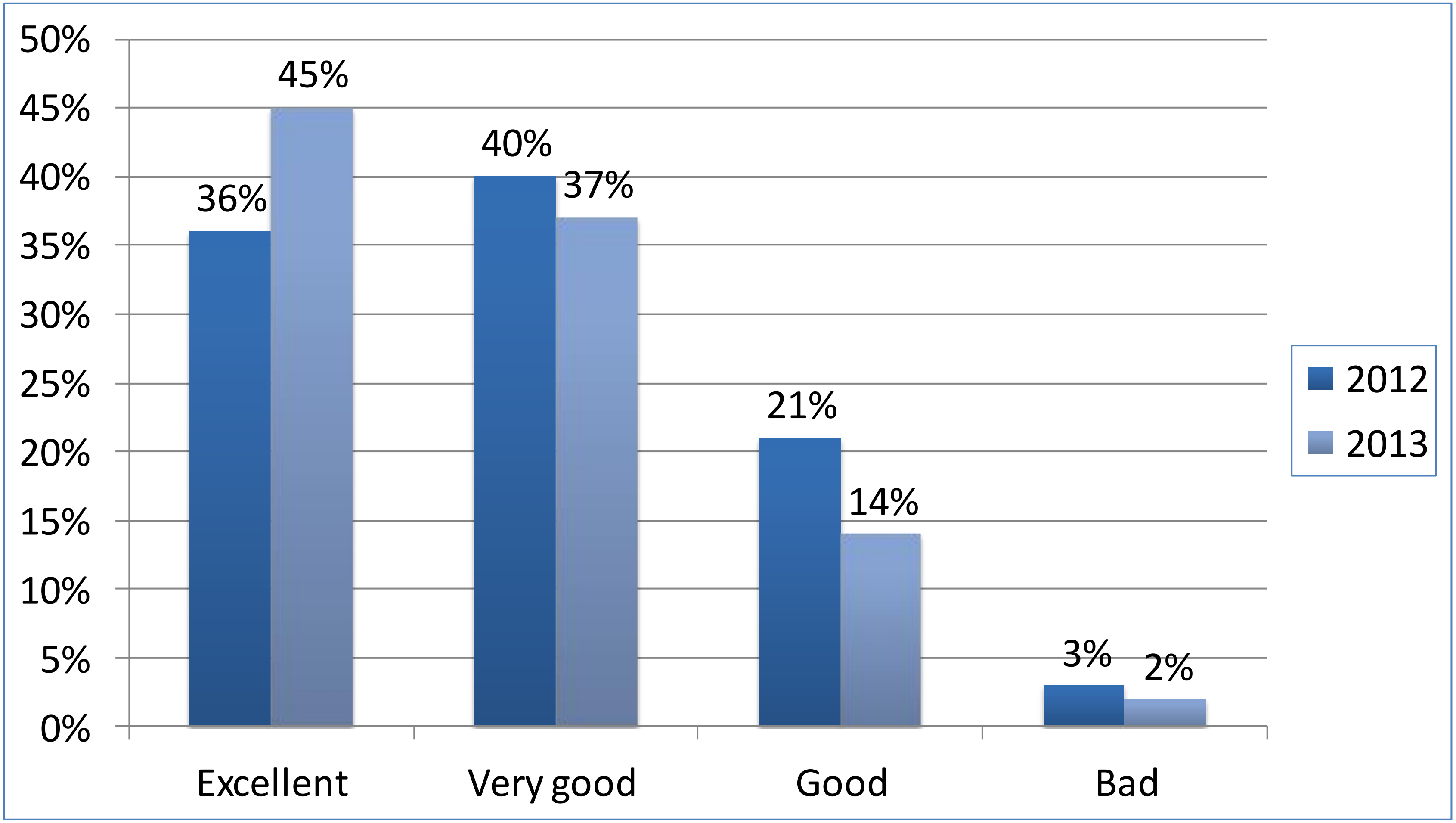
Durban as a Convention Destination: Reasons for Ratings (cont'd)

	2012	2013
Good facilities at the ICC	8%	30%
Spacious/good conference venue	7%	-
Friendly/kind people	2%	10%
Good/warm weather	17%	7%
Sea/beautiful beaches/coastline	5%	2%
Lots to do/attractions/entertainment	7%	2%
Excellent convention destination	2%	2%
Expensive	2%	-
Good infrastructure	5%	2%
Good facilities	42%	-
Everything is within a short distance	3%	-
A holiday/tourism destination	2%	-

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

	2012	2013
Close proximity to attractions/facilities/hotels	5%	16%
Accessibility/location	22%	3%
The ability of the ICC/Durban to host conventions	3%	2%
Good convention facilities	13%	8%
Internet access is expensive	2%	-
It lacks 5 star accommodation	2%	-
There is room for improvement	2%	-
Unsatisfied with venue location	3%	-
Mixture of leisure and business opportunities	3%	-
Clean	-	2%
Good accommodation	-	5%
Well organized	-	4%

Rating of Durban as a Holiday Destination



Durban as a Holiday Destination: Reasons for Ratings

	2012*	2013*
Friendly/kind/helpful people	9	16
Beautiful city	2	7
Good/warm weather	30	41
Affordable	1	-
Sea/beautiful beaches	20	28
Lots to do/see/attractions/entertainment	15	27
Hospitality	1	2
Good food	2	-
Good facilities/resources/amenities	3	4
The city is not clean/needs to be cleaned	3	1
Easy city to access	1	-
An international tourism destination	1	2
uShaka Marine World	-	2

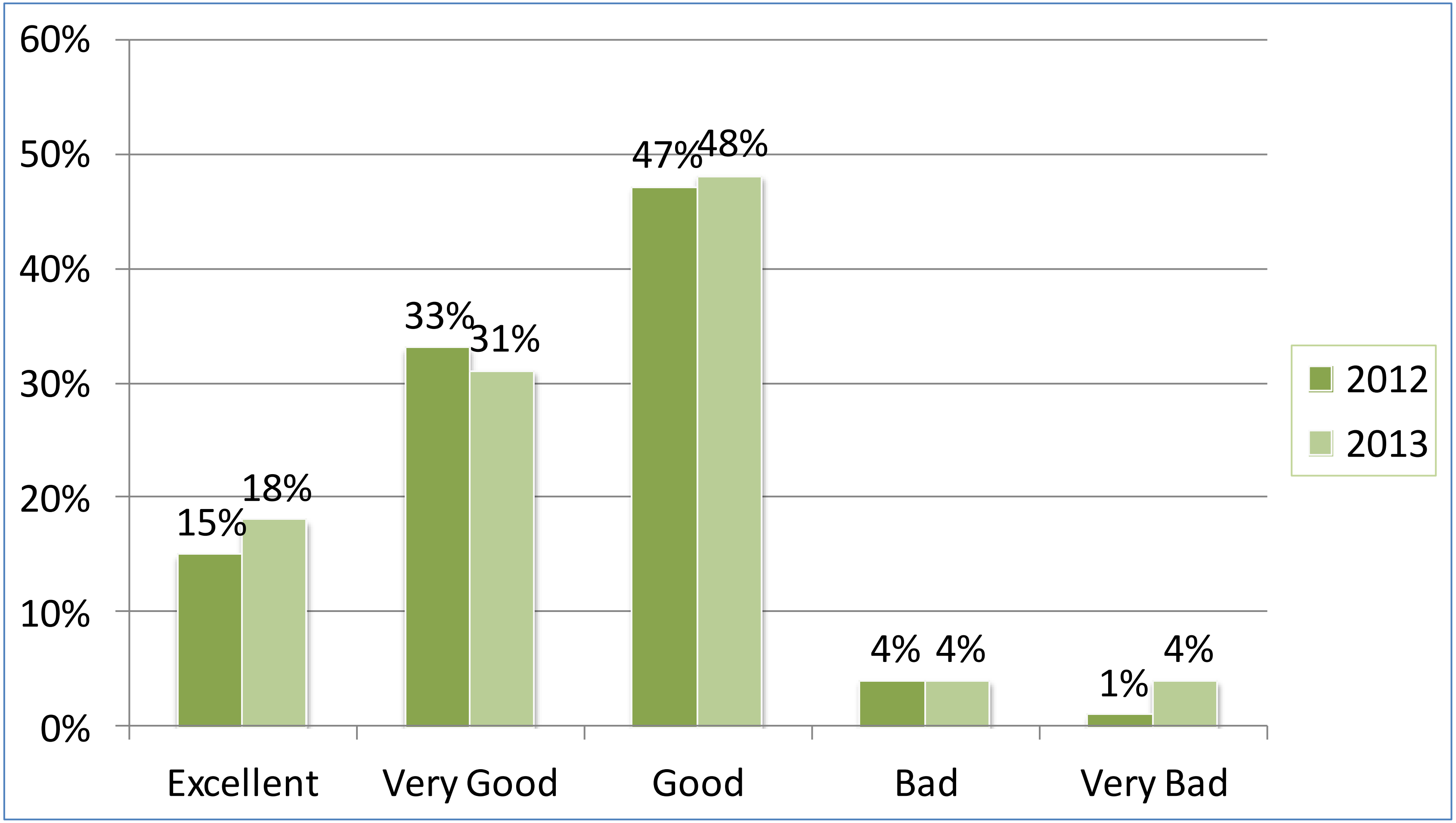
Note: number of mentions

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

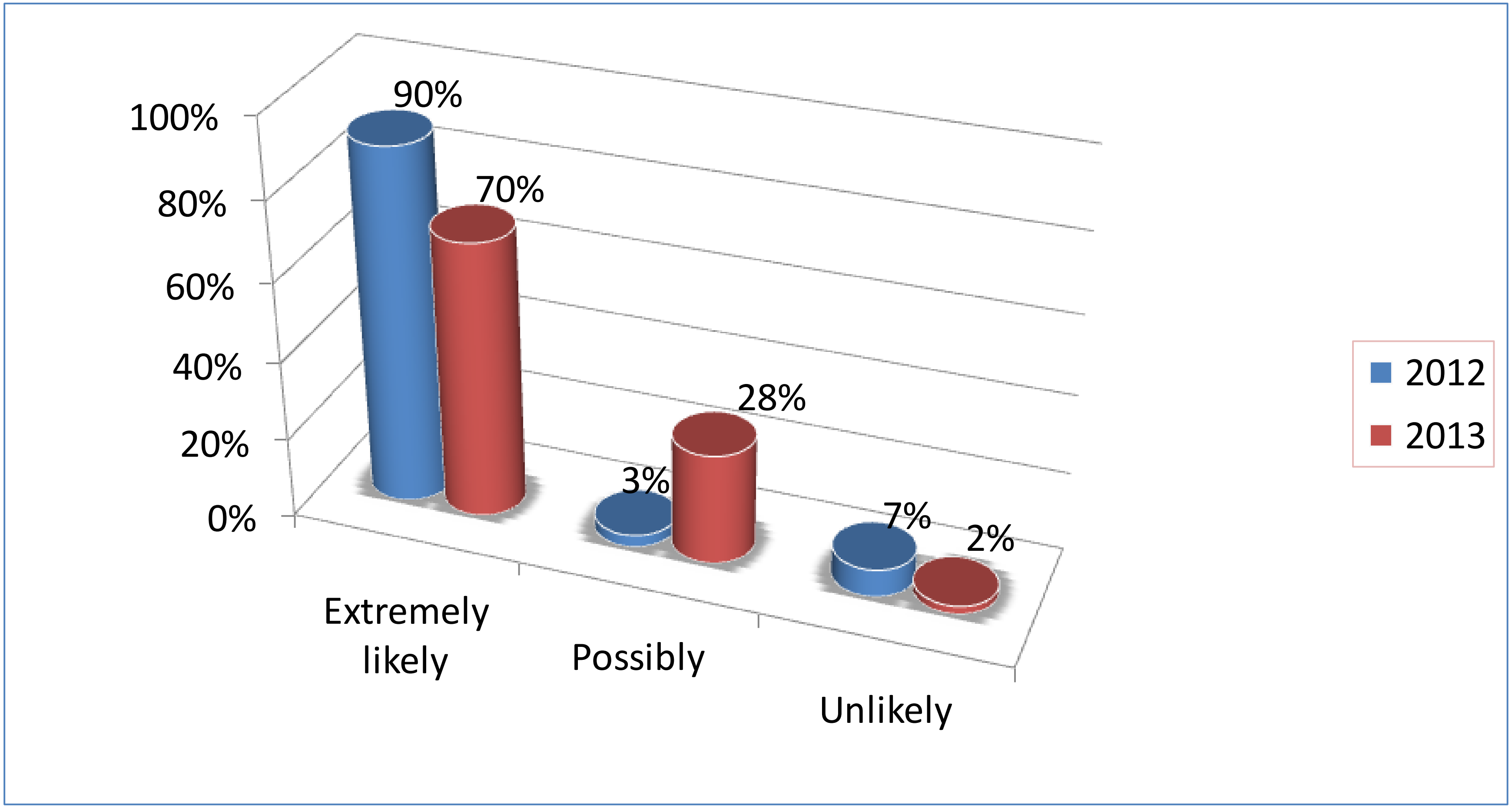
	2012*	2013*
Good hotels	1	5
Lovely attractions	1	-
Everything is within a short distance	3	3
A holiday destination	1	-
Peaceful place	3	1
Improvements made at the beachfront	1	2
Crowded beaches during holidays	1	-
Good atmosphere	2	2
Expensive accommodation	1	-
The facilities are not well kept around Durban	1	-
Durban has everything e.g. beaches, activities	2	3
Unsafe	1	4
Moses Mabhida Stadium	-	2
Shopping	-	2

Note: Number of mentions

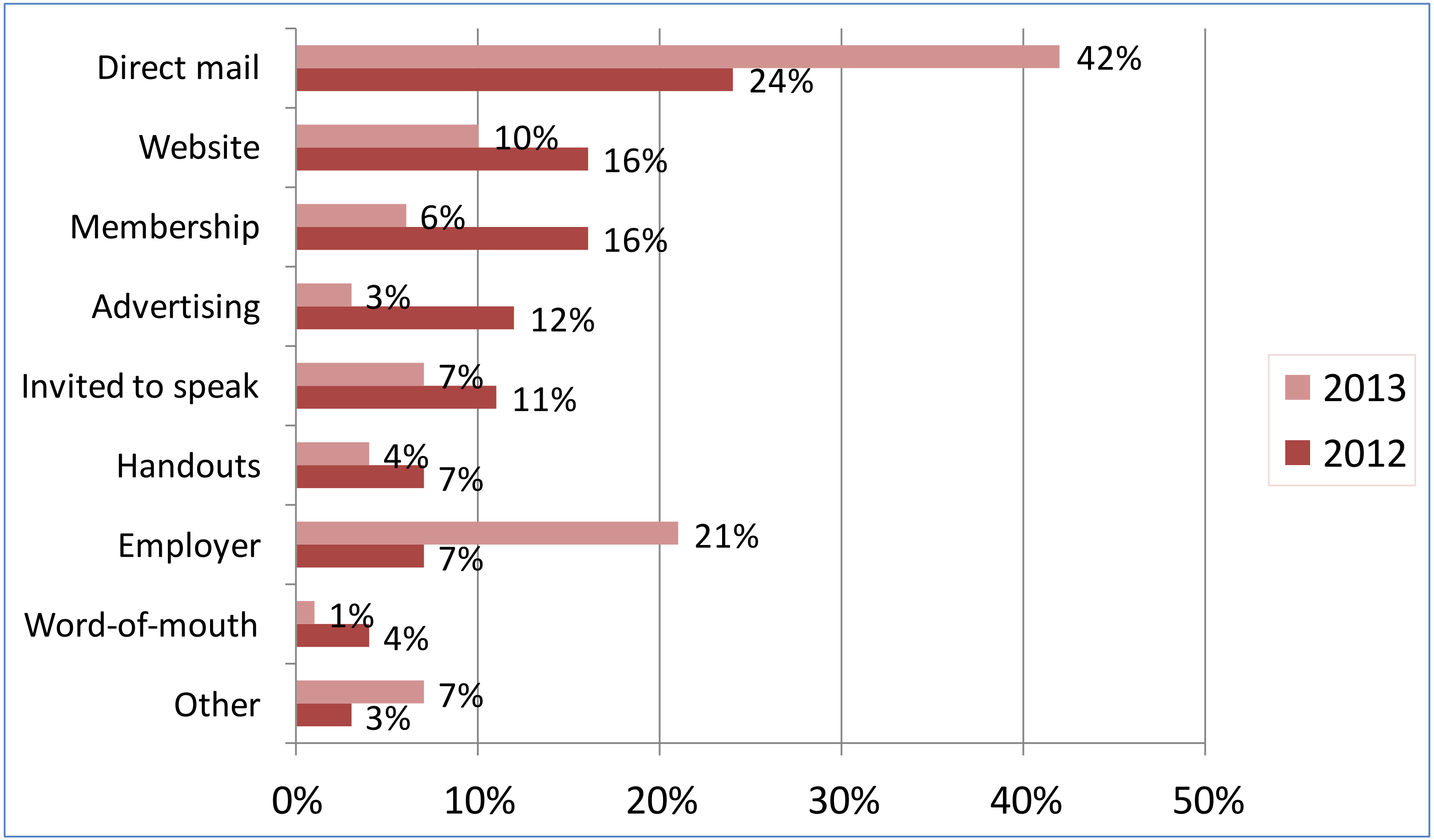
Rating of Durban as a Value for Money Destination



Likely to Visit Durban & Surrounds in Next 5 Years?



Convention Awareness



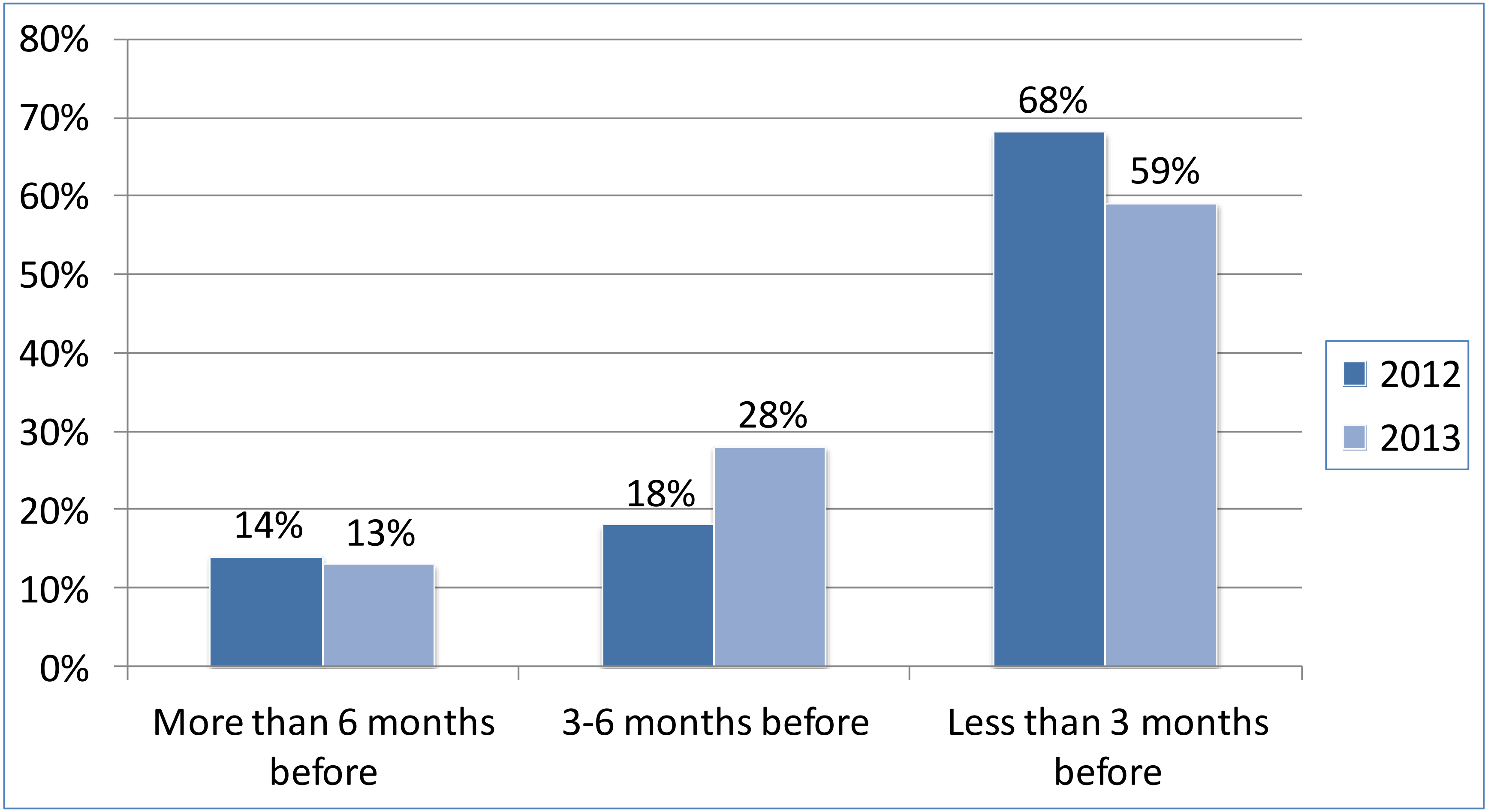
Comparing 2012 to 2013 there was a significant increase in the number of respondents who became aware of the conference via direct mail and through their employer.

Factors that influenced decision to attend

Factors	Mentions
Opportunity to network with business colleagues	66
Invited to attend	47
Employer decision	34
Topics presented at convention	28
Other	13
Social events and other arrangements	12
South Africa as a holiday destination	9
Speaker at/organiser of convention	8
Travel time to Durban	8
South Africa’s wildlife scenery	7
Membership of group holding convention	6
South Africa’s adventure	6
Durban & surrounds as a holiday destination	5
South Africa’s culture/heritage	4
South Africa’s weather	4
South Africa’s shopping	4
Low registration cost	2
South Africa’s beaches	2
Sponsorship/availability of funding	1

South Africa KWAZULU-NATAL
Zulu Kingdom. **Exceptional**

When Registered



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

Mean		
	Overall	International
Accommodation quality and service	3.5	**4.9**
ICC decoration and fittings	**4.9**	4.7
Meeting rooms	**5.1**	4.7
Food and beverages	4.5	4.1
ICC service	**4.9**	**4.9**
Technical equipment	4.5	3.8
Convention programme	4.7	4.4
Overall satisfaction	**4.9**	4.6

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

South Africa
KWAZULU-NATAL
Zulu Kingdom. **Exceptional**

Mean		
	Overall	International
Access	4.1	4.6
Reception in South Africa (respondents from outside of SA only)	-	**5.2**
Safety	**4.5**	4.2
Cleanliness	**4.2**	**4.8**
Banking	3.1	2.6
Sightseeing	3.2	3.0
Public Transport	3.0	3.0
Restaurants	3.9	4.1
Price of accommodation	3.1	3.1

Estimated Economic Impact: Conference Delegates

	2012		2013	
	Foreign	Domestic	Foreign	Domestic
Mean	R1 500*	R4 150	R3 592	R2 152*
Estimated direct spend	Between R708 244 and R1 241 247		Between R438 524 and R1 036 932	
Estimated total spend (multiplier of 1.42)	Between R1 005 707 and R1 762 571		Between R622 704 and R1 472 444	
Estimated total spend (multiplier of 2)	Between R1 416 488 and R2 482 492		Between R877 048 and R2 073 865*	

*The change between 2012 and 2013 was as a result of the decrease in the mean domestic spend and an increase in the number of domestic delegates from 228 in 2012 to 266 in 2013.

**Most of the foreign delegates were hosted buyers, hence the spend was low as they were not personally responsible for bulk of expenditure such as accommodation. This being the case this spend illustrates other spend by these delegates and spend by delegates not sponsored.*

**This is at 95% confidence level (5% chance of error)

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Estimated Economic Impact: Organizer Spend

Conference logistics	R400 000
Food and beverages	R58 314
Hosted buyers, speakers and staff to and in Durban	R1 150 000
ICC hire	R711 477

Rating Aspects of the Conference

Topic	Mean
Improvement of your knowledge and expertise in your field	4.7
Commitment to the environment	4.2
Commitment to social responsibility	4.1
Exposed to new insights and ideas	4.6
Focused on latest research and practical applications	4.3
Led to dissemination of new knowledge	4.4
Enabled the international community to focus on global and domestic issues.	4.6
Resulted in the creation of business and/or research relationships	4.6
Opportunities for business and/or research collaboration	4.6

Rating the Outcomes of the Conference

Topic	Agree	Disagree	Unsure
Share information gained with colleagues and peers	86%	3%	11%
Apply the new insights to professional practice	96%	2%	2%
Share information gained with students	90%	2%	8%
Form or strengthen collaborations with researcher and/or practitioners from the conference destination	65%	19%	16%
Form new collaborations with international researchers and/or practitioners	70%	6%	15%
Strengthen advocacy and/or policy work	78%	8%	13%
Refine existing research	70%	10%	20%
Apply new insights to research programs	74%	8%	18%
Undertake new research	73%	10%	17%

Findings

1. The majority of respondents, 53%, were from KwaZulu-Natal, followed by Gauteng at 26%. This was an increase of KZN and a decrease of Gauteng respondents compared to 2012.
2. A large proportion of the respondents were between the ages of 30-39 (28%) and 40-49 (28%).
3. In terms of gender, the respondents were mainly male (63%).
4. The 4 (52%) and 5 star (14%) hotels were the most utilised form of accommodation.
5. Most respondents arrived the night before the conference and stayed for an average of 2 nights during the conference. This research also showed that the respondents stayed for an average of 3.1 nights as a result of the conference.
6. Most of the respondents (30%) booked their accommodation through a travel agent.

Findings

7. Only 6% of the respondents said they undertook pre-conference tours with 17% indicating they were going to undertake post-conference tours. The majority of them (77%) were not going to participate in either one of them.
8. uShaka Marine, The Golden Mile and the Gateway Shopping Complex were the more popular attractions visited by the respondents.
9. 22% of the respondents indicated that attending this conference was their first visit to Durban. A further 9% indicated that they have visited only once previously. This is an important finding in that in attracting first time visitors it shows that the conference is exposing the destination to more people.
10. The primary purpose of previous visits to Durban was business (40%) and attending a conference or exhibition (34%).

Findings (cont'd)

11. The respondents rated Durban as a convention destination as **excellent (43%)** and **very good (38%)**. The main reasons for this were:
    - Good facilities at the ICC
    - Friendly/kind people
    - Good warm weather
12. The rating with regards to Durban as a holiday destination, was 45% as **excellent** and 37% as **very good.** The overall responses were positive (97%). Some of the reasons were:
    - Good/warm weather
    - Sea/beautiful beaches
    - Lots to see and do
13. The respondents rated Durban as a **good** (48%) and **very good** (31%) value for money destination.
14. In terms of likelihood to visit Durban and surrounds in future, 70% of the respondents said they were **extremely likely** to visit. This augurs well for Durban. In addition, only 2% indicated that they were unlikely to visit Durban in the next five years.

Findings (cont'd)

15. The respondents were asked which factors influenced their decision to attend the conference/exhibition. The top 4 factors mentioned were as follows:
    - Opportunity to network with business colleagues (66 mentions)
    - Invited to attend (47 mentions)
    - Employer decision (34 mentions)
    - Topics presented at the convention (28 mentions)
16. The majority of respondents (59%) registered for the conference less than 3 months before it took place. 28% registered 3-6 months before the conference. This was an improvement over 2012 when the last minute bookings constituted 18% of the total. This is an indication that work done by organizers to get early bookings has paid dividends.
17. 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 accommodation quality and service being rated the lowest at an average of 3.5. However, the international delegates rated the accommodation quality and service as 4.9.

Findings (cont'd)

18. In terms of satisfaction levels with Durban and surrounds as a tourist destination, public transport, banking and price of accommodation were rated the lowest. They received an average ratings of 3.0, 3.1 and 3.1, respectively.

    Conversely, the international respondents' ratings differed significantly from the overall figures, such as banking which was rated 2.6. The researcher suggests that it is the perception and expectation of the respondent that influences the rating. An example is that the overall rating for cleanliness was 4.2. The international respondents gave a rating of 4.8, therefore it is clear that the domestic respondents had provided a lower rating. Thus the expectations of the international respondent were not as high as those of the domestic respondent.

19. The economic impact was estimated to be between R877 048 and R2mn. In addition, the organizers spent approximately R2.3mn in organizing the conference.

Recommendations

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

1. It is suggested that the organizers schedule the conference to be close to an event, such as a national or provincial event thus enabling delegates to attend and experience a sporting event. A further example is the hosting of the AIMS Conference in the same week as the Comrades Marathon, where delegates from the conference, which is related to the marathon, could stay on to watch or participate in the Comrades.

2. Packaging and marketing of the conference should include other tourism activities, such as going to the top of the Moses Mabhida Stadium or a guided walk along the Umgeni River, to enhance the experience of visitors to the city or province. This would encourage visitors to stay longer.

3. The price of accommodation was not considered to be value for money in either 2012 or 2013. The organizers should consider negotiating cheaper conference rates for early bird bookings, such as it is done for conferences arranged by the Travel and Tourism Research Association.