The FNB Dusi 2017
Economic Impact Assessment
Topline Summary Report

Richard Wyllie
Karen Kohler
Tourism KwaZulu-Natal

March 2017

Methodology

- Face to face surveys with a probability sample of **225** respondents

- Respondents were systematically selected by the hour during two days of the three day event: on Friday, 17^{th} of February (Inanda Dam) and Saturday, 18^{th} of February 2017 (Blue Lagoon).

- Used the internationally accepted 'representative sampling' research methodology for the event (see next slide)

Methodology (cont'd.)

Representative Sampling

A **small quantity of something** such as customers, data, people, products, or materials, **whose characteristics represent** (as accurately as possible) the **entire batch, lot, population, or universe**.

Two advantages

1. Saves **time** (not enough time to interview 1 000 people during an event)

2. Saves **money** (fieldworkers are paid per survey/questionnaire –

E.g. 1 000 surveys @ R25 = R25 000)

National Department of Tourism: Accepted Standards

10 people in a room – interview all 10.

100 people in a room – safe with 40-50 surveys.

1 000 people in a room – safe with 100 surveys.

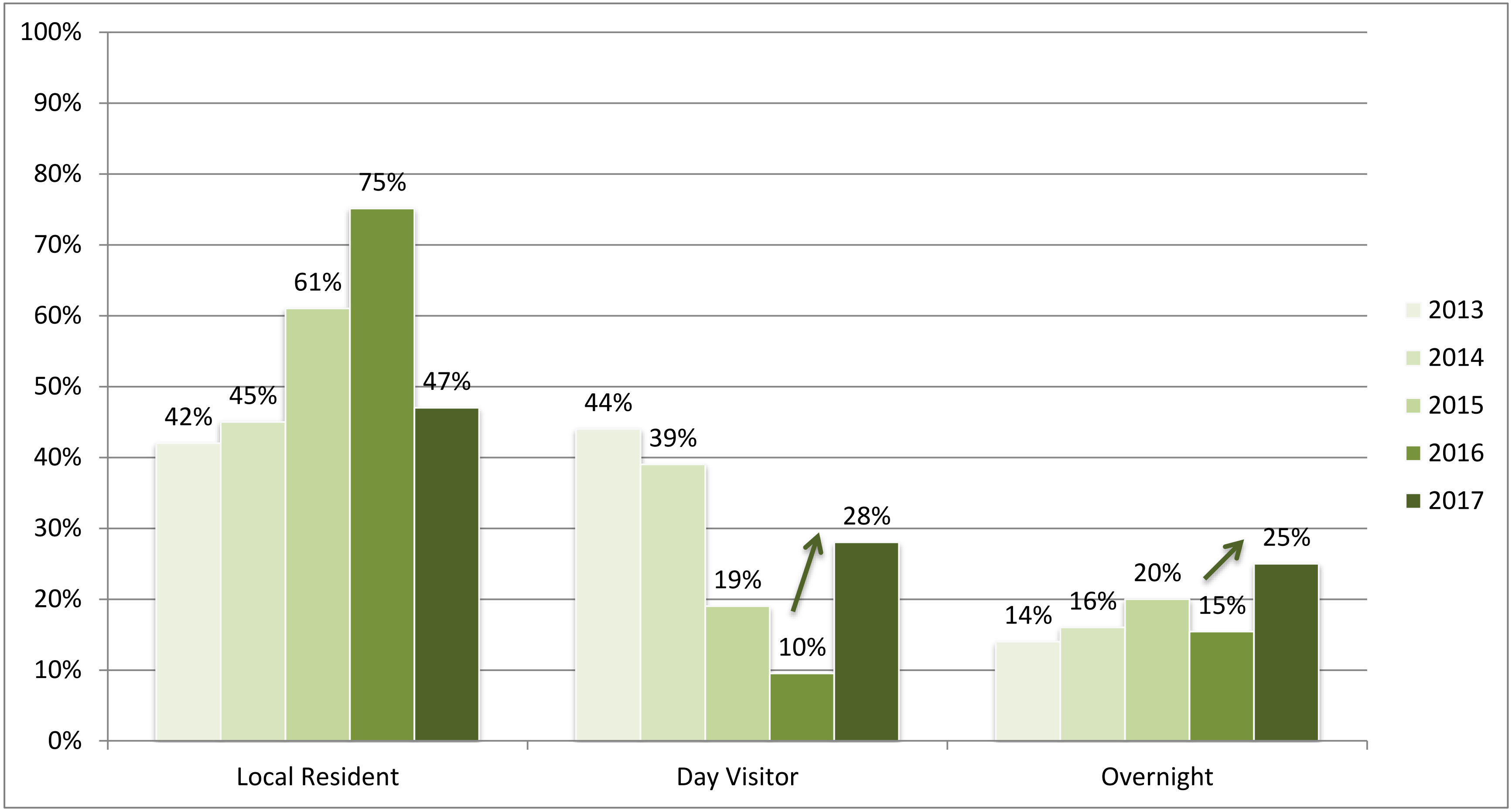
10 000 people in a room – safe with 150-200 surveys.

i.e. If the sample size grows to more than 400 (in relation to the population), any addition to the sample size **becomes statistically irrelevant**.

Positive Highlights

- ❑ **91%** of the respondents indicated that they would attend the event again.
- ❑ **92%** of the respondents had a ‘good’ or ‘excellent’ experience at the event.
- ❑ **91%** of the respondents did not experience any problems at the event.
- ❑ **75%** would visit KwaZulu-Natal in the next 12 months for a holiday.
- ❑ **96%** said that they would recommend the event to their friends and family.
- ❑ The estimated economic impact of the event was as much as **R9.1 million**.

Local Residents vs Visitors



There was a significant decrease (by 28%) in the number of respondents who were local residents. Along with this, there was also a significant increase in both overnight (by 18%) and day visitors (by 10%), when comparing 2017 with 2016. This is a positive finding and it has had a positive influence on the economic impact on the event.

Breakdown of Respondents

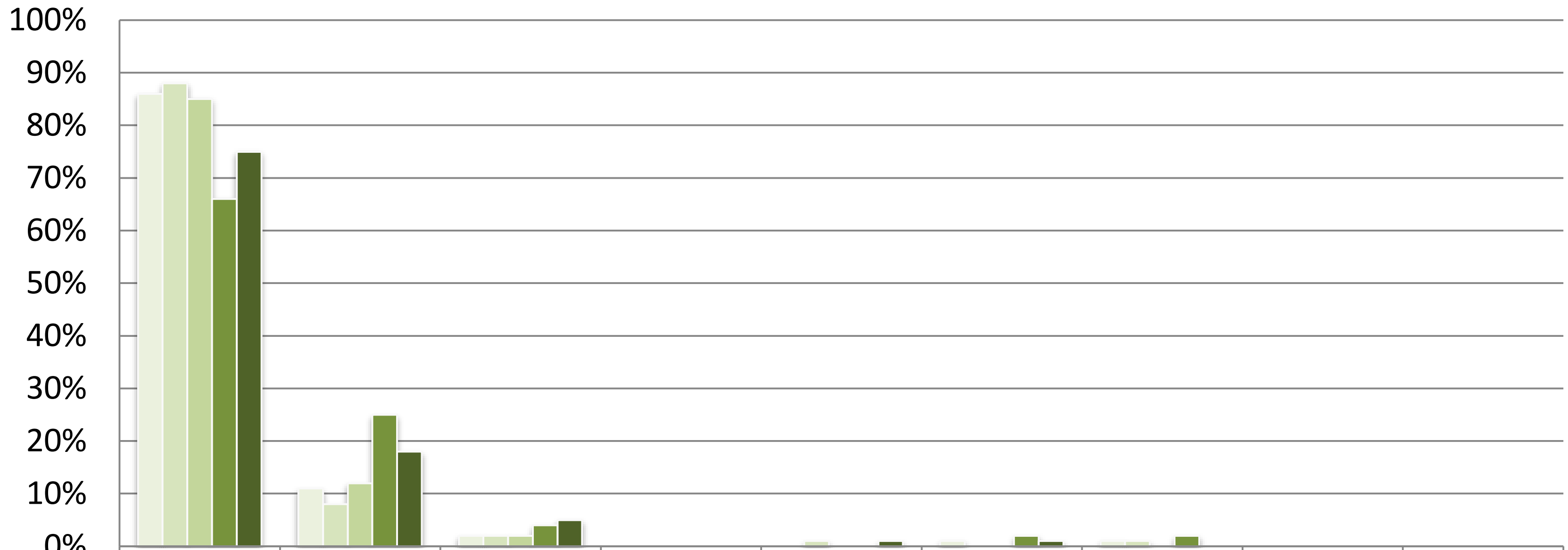
2016	Sample	%	Total Attendance*
Local Residents	151	75	2 144
Day Visitors	19	10	286
Overnight Visitors	31	15	429
TOTAL	**201**	**100**	**2 859**

2017	Sample	%	Total Attendance*
Local Residents	106	47	1 160
Day Visitors	63	28	692
Overnight Visitors	56	25	618
TOTAL	**225**	**100**	**2 470**

The table outlines the breakdown of the estimated numbers that attended the event. The breakdown of the numbers is based on the proportion of local residents and visitors, which has been obtained from the surveys.

*****It is important to note that the total attendance was estimated to be **2 470**. This is based on the total number of participants (**1 029**) multiplied by the average group size (**2.4**).

Provincial Origin: All Respondents



	KZN	Gauteng	W. Cape	N. Cape	E. Cape	Free State	Mpum.	Limpopo	N. West
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
2016	66%	25%	4%	0%	0%	2%	2%	0%	0%
2017	75%	18%	5%	0	1%	1%	0	0	0

There was a 9% increase in the number of respondents who came from KZN in 2017. In addition to this, there was a 7% decrease in the number of respondents who came from Gauteng. In terms of domestic tourism in the province, this event attracted more intra-provincial tourists than inter-provincial tourists.

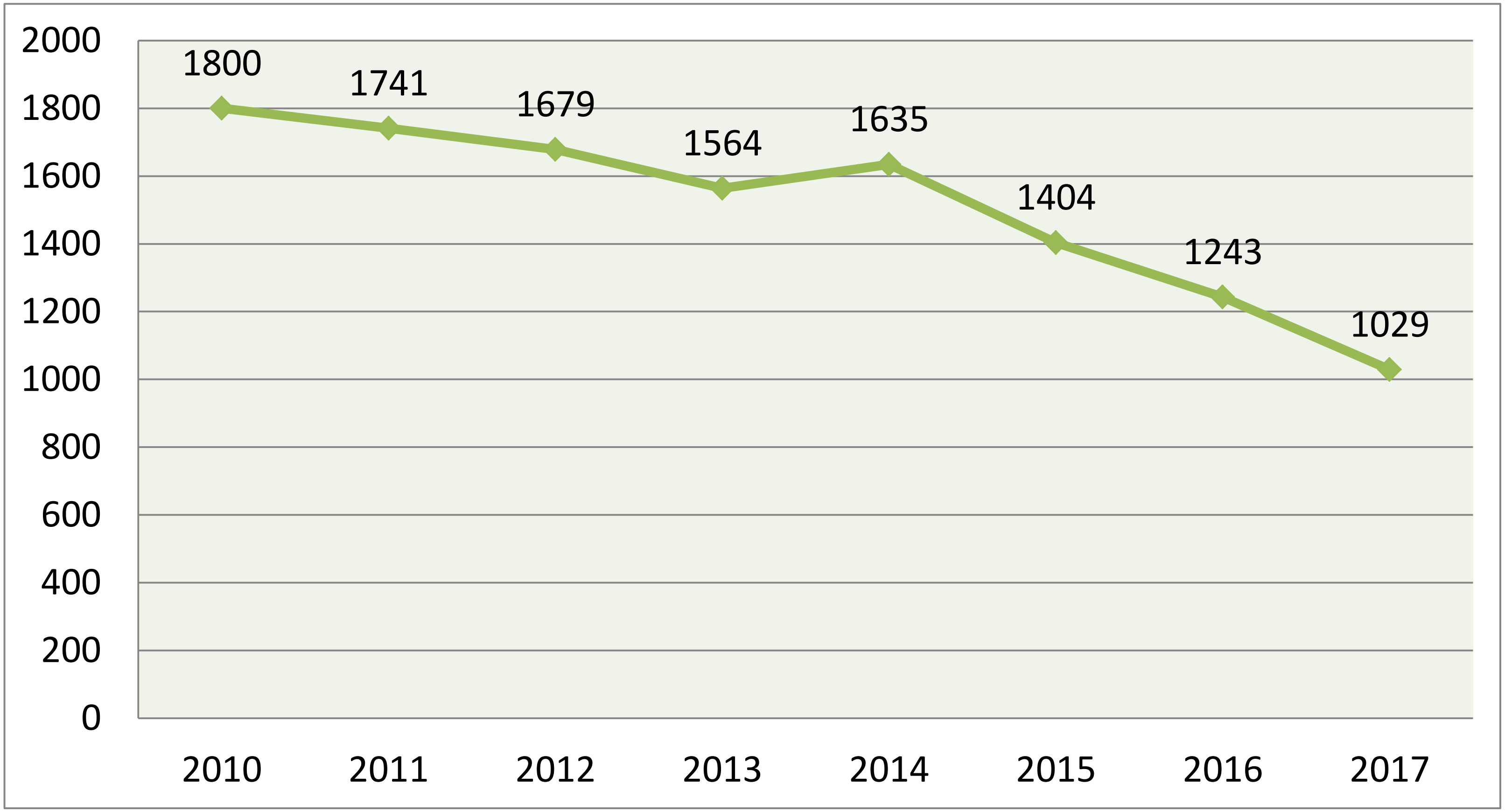
Nature of the Dusi Canoe Marathon Participants

2016	KZN	Gauteng	W Cape	Central Districts	E Cape	International
Percent	76%	16%	4%	1%	1%	2%
Number*	*945*	*199*	*50*	*12*	*12*	*25*
TOTAL						**1 243**

2017	KZN	Gauteng	W Cape	Central Districts	E Cape	International
Percent	73%	19%	4%	1%	2%	2%
Number	748	195	41	7	20	18
TOTAL						**1 029**

*Note: This information was supplied by the organizers of the event.

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



It is clear that the number of participants have slowly declined each year – barring a slight increase of participants in 2014. The total number of participants in 2017 was the lowest in the last six years. It is highly probable that the national drought has had a major impact on the numbers for 2016 and 2017.

Estimated Mean Spend per Category

	2013	2014	2015	2016	2017
Accommodation*	R1 983	R1 729	R3 566	R2 455	↑R4 339
Transport (e.g. fuel)	R757	R664	R907	R767	↓R697
Food & Beverages	R397	R564	R609	R570	↓R562
Entertainment	R492	R730	R557	R540	↓R74
Souvenirs/Other	R282	R490	R607	R700	↓R51
Average Total Spend	**R1 274**	**R1 776**	**R2 199**	**R1 420**	**↑R2 049**

~~*Includes the amount for overnight visitors only.~~

There has been a increase in total average spend of all of the respondents in 2017. This is mainly driven by a significant increase in the spend on *Accommodation*, as all of the other categories of spend have seen a decline when comparing 2017 with 2016. It was expected that the increase in the total average spend has had a positive influence on the overall economic impact of the event. It is difficult to conclude on the reasons for the decline in the other categories. However, it is likely that the state of the national economy may have had an influence on the spend. For example, most people are probably saving money for family holidays or for other sports events (e.g. MTB events)

Estimated Economic Impact

	2013		2014		2015		2016		2017	
	No.	**Mean**	**No.**	**Mean**	**No.**	**Mean**	**No.**	**Mean**	**No.**	**Mean**
Participants	1 564	R1 694	1 635	R2 189	1 404	R1 968	1243	R1 898	↓1 029	↑R3 089
Spectators: local residents	2 520	R437	3 060	R662	2 647	R739	1 212	R640	↓677	↑R768
Spectators: day visitors	2 640	R718	2 160	R1 323	825	R988	162	R620	↑403	↑R1 349
Spectators: overnight visitors	840	R4 874	840	R6 453	868	R4 407	242	R2 967	↑361	↑R3 567

The mean spend across all categories has increased when comparing 2017 with 2016. It is difficult to ascertain the reason for the increased spend, but it could have followed the same trend as domestic tourism in KZN – whereby the number of trips/tourists had decreased but the direct spend per trip had increased.

Estimated Economic Impact (cont'd)

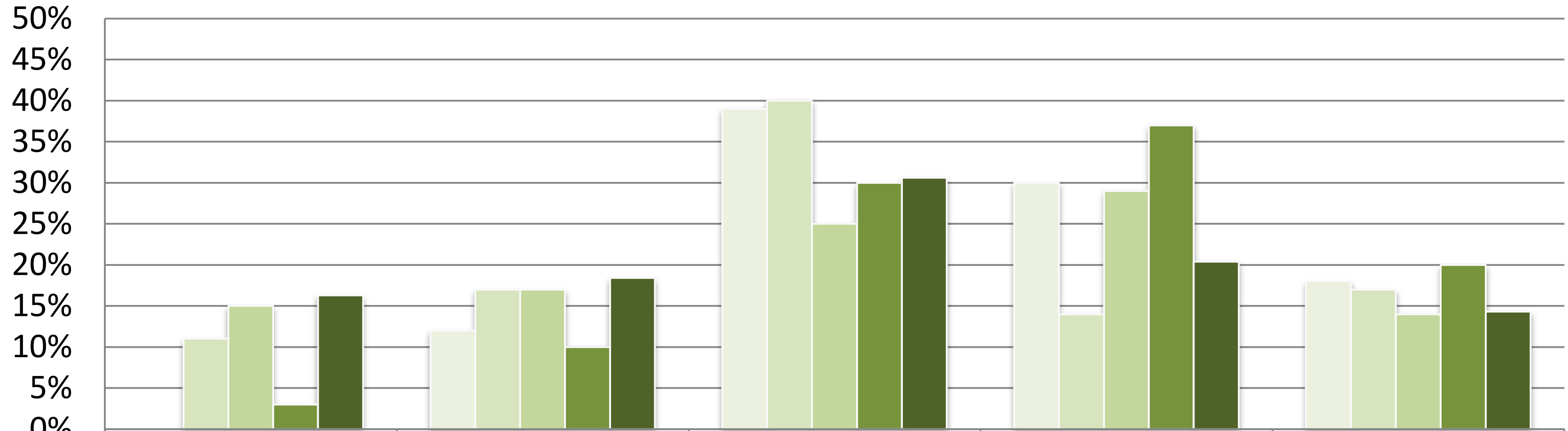
		2013	2014	2015	2016	2017
Estimated Direct Impact	At Least:	R4 999 453	R8 436 420	R 5 387 988	R 1 205 490	↑**R 3 201 640**
	As much as:	R12 461 510	R15 354 487	R 9 805 284	R 2 644 785	↑**R 4 553 560**
Estimated Total Impact (multiplier of 1.42)	At least:	R7 009 223	R11 979 420			
	As much as:	R17 695 345	R21 803 372			
Estimated Total Impact (multiplier of 2.0)	At least:	R9 998 906	R16 872 840	R10 775 976	R2 410 980	↑**R 6 403 280**
	As much as:	R24 923 302	R30 708 975	R19 610 568	R5 289 570	↑**R 9 107 120**

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.

There has been **an increase** in the total economic impact of the event – yet it has still not reached the same figures as previous years (excluding 2016). The most probable reason for the increased impact is the increased spend of the respondents, as well as an increased number of visitors. However, the low number of participants and small group size (of 2.4) is still having an effect on the low economic impact of the event. It may be assumed that the economic situation in the country is having an effect on events such as this one.

Length of Stay

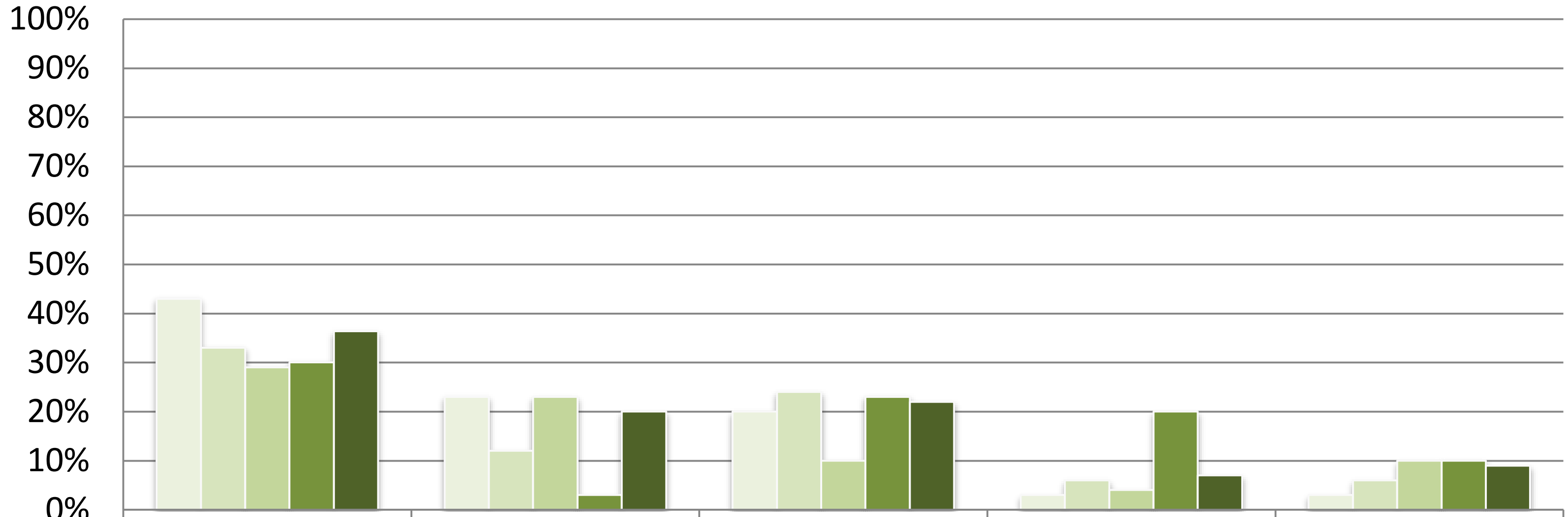
Average stay: 3.5 nights



	1 night	2 Nights	3 nights	4 nights	>4 nights
2013	0%	12%	39%	30%	18%
2014	11%	17%	40%	14%	17%
2015	15%	17%	25%	29%	14%
2016	3%	10%	30%	37%	20%
2017	16%	18%	31%	20%	14%

There was a increase in the number of respondents who stayed for 1 night (by 13%) and for more than 2 nights (by 8%). There also seems to have been a decline in respondents who stayed for 4 nights (by 17%) and for more than 4 nights (by 6%). This is surely an indication of the current economic conditions in SA, as respondents have seemed to have only stayed away fro home if necessary. Still, over 50% stayed overnight for 3 or 4 nights, which is the general period of the event. Once again, the effects of the economy are evident.

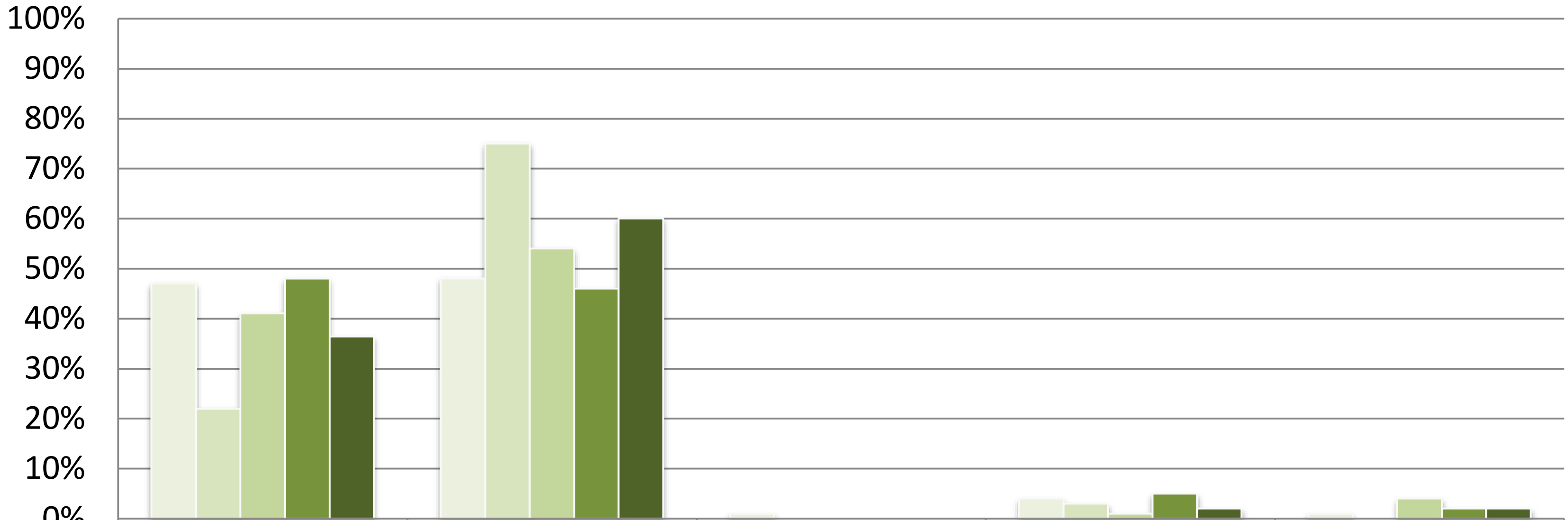
Accommodation: Top 5 Choices



	Friends/family	Camping	B&B	Self-catering	Family Hotel
2013	43%	23%	20%	3%	3%
2014	33%	12%	24%	6%	6%
2015	29%	23%	10%	4%	10%
2016	30%	3%	23%	20%	10%
2017	36%	20%	22%	7%	9%

In terms of the top five choices of accommodation types, some 58% of the respondents made use of 'paid' establishments. The most popular choices were *B&Bs* (22%) and *Self-Catering Units* (20%). This finding backs up the fact that the average spend on accommodation had increased. Furthermore, there was a 6% increase in the number of respondents who stayed with *Friends/Family*.

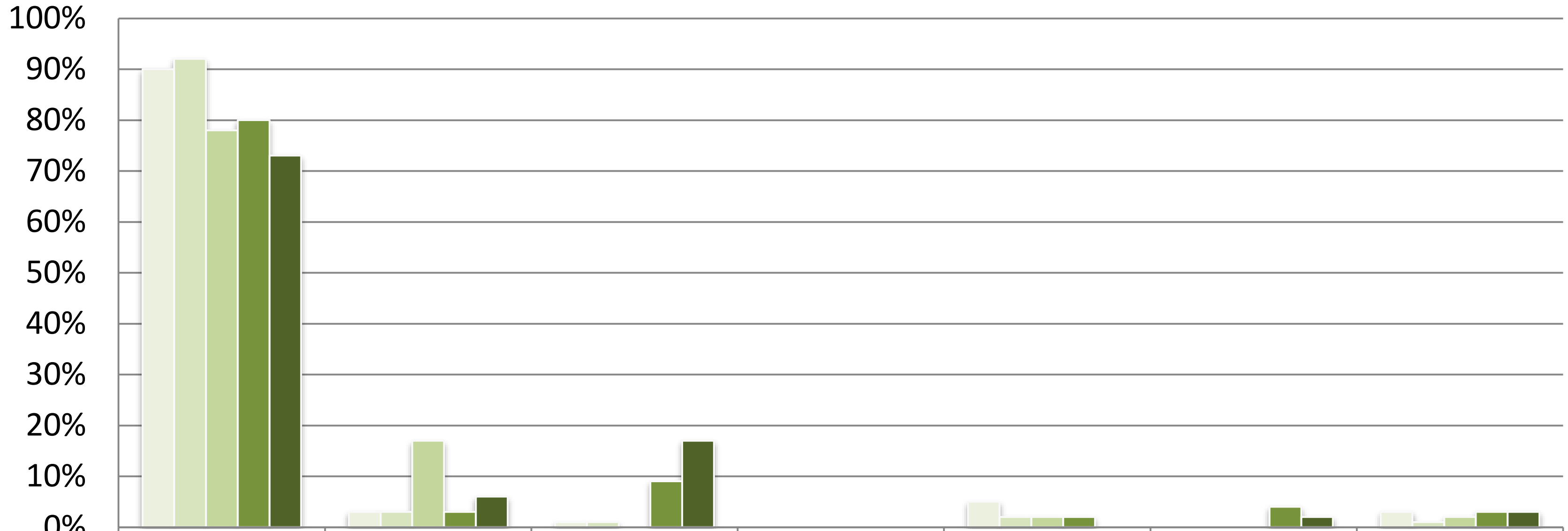
Primary Reason



	Participant/Crew	Spectator	Holiday	Other	VFR
2013	47%	48%	1%	4%	1%
2014	22%	75%	0%	3%	0%
2015	41%	54%	0%	1%	4%
2016	48%	46%	0%	5%	2%
2017	36%	60%	0%	2%	2%

It is evident that there was a 12% decrease in the number of participants who were interviewed, while there was a 14% increase in the number of spectators. This finding could be seen as a actual reflection of who attended the event, but it is also a sign of the 'unwillingness' of participants to answer the surveys – which is understandable, especially at the finish as they would have been exhausted.

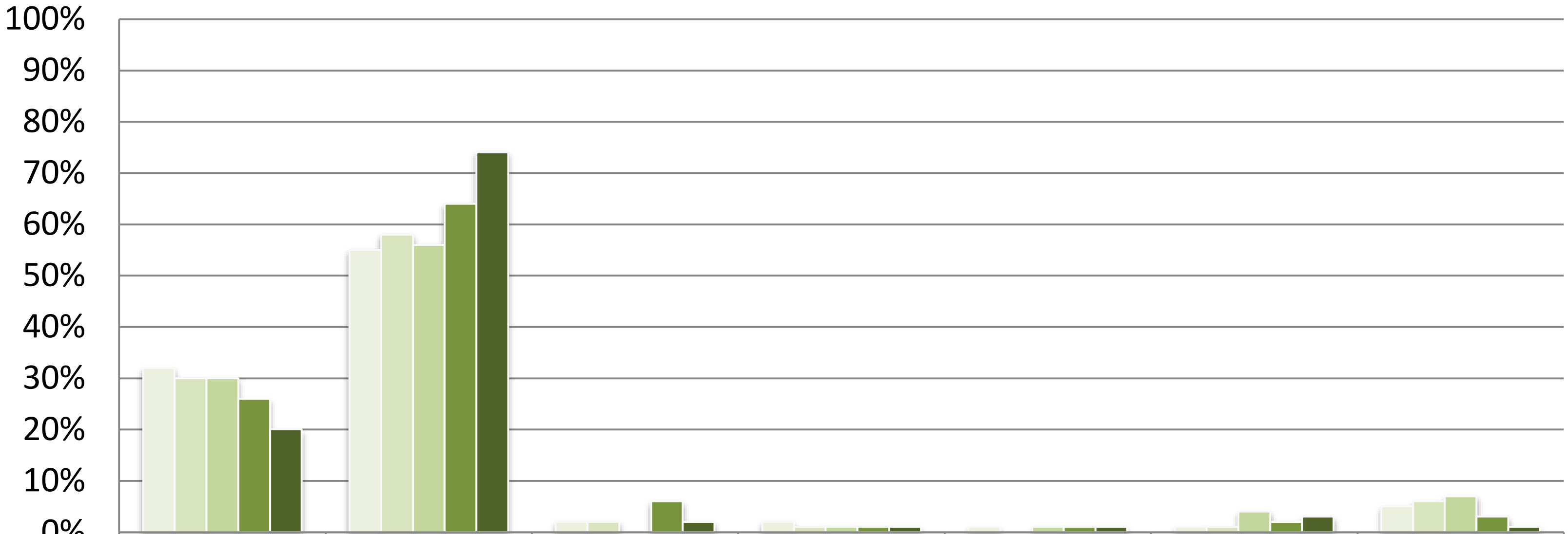
Transport to Event: Visitors Only



	Private vehicle	Minibus-taxi	Rental	Train	Other	Bus	Airplane
2013	90%	3%	1%	0%	5%	0%	3%
2014	92%	3%	1%	0%	2%	0%	1%
2015	78%	17%	0%	0%	2%	0%	2%
2016	80%	3%	9%	0%	2%	4%	3%
2017	73%	6%	17%	0%	0%	2%	3%

Once again, the majority of the respondents travelled to the area of the event in *private vehicles*. The parking problems, that many respondents state, are most likely caused by this finding. In addition to this, there was also an increase (by 8%) in the number of respondents who used a *rental vehicle*.

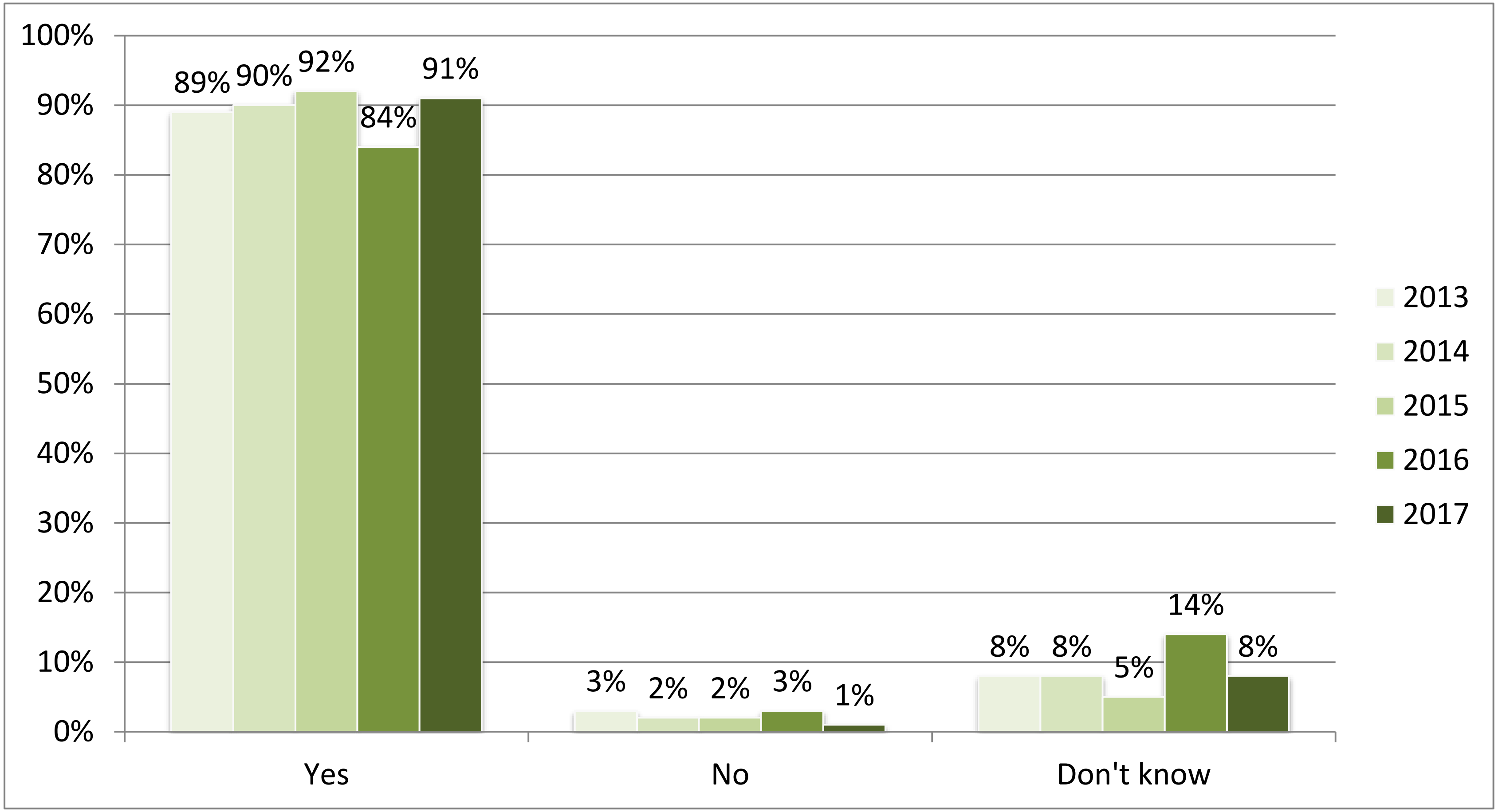
Main Influence



	Word-of-mouth	Attended/Particpated Previously	TV Ad	Newspaper/ Magazine	Poster/Banner/Flyer	Radio	Other
2013	32%	55%	2%	2%	1%	1%	5%
2014	30%	58%	2%	1%	0	1%	6%
2015	30%	56%	0%	1%	1%	4%	7%
2016	26%	64%	6%	1%	1%	2%	3%
2017	20%	74%	2%	1%	1%	3%	1%

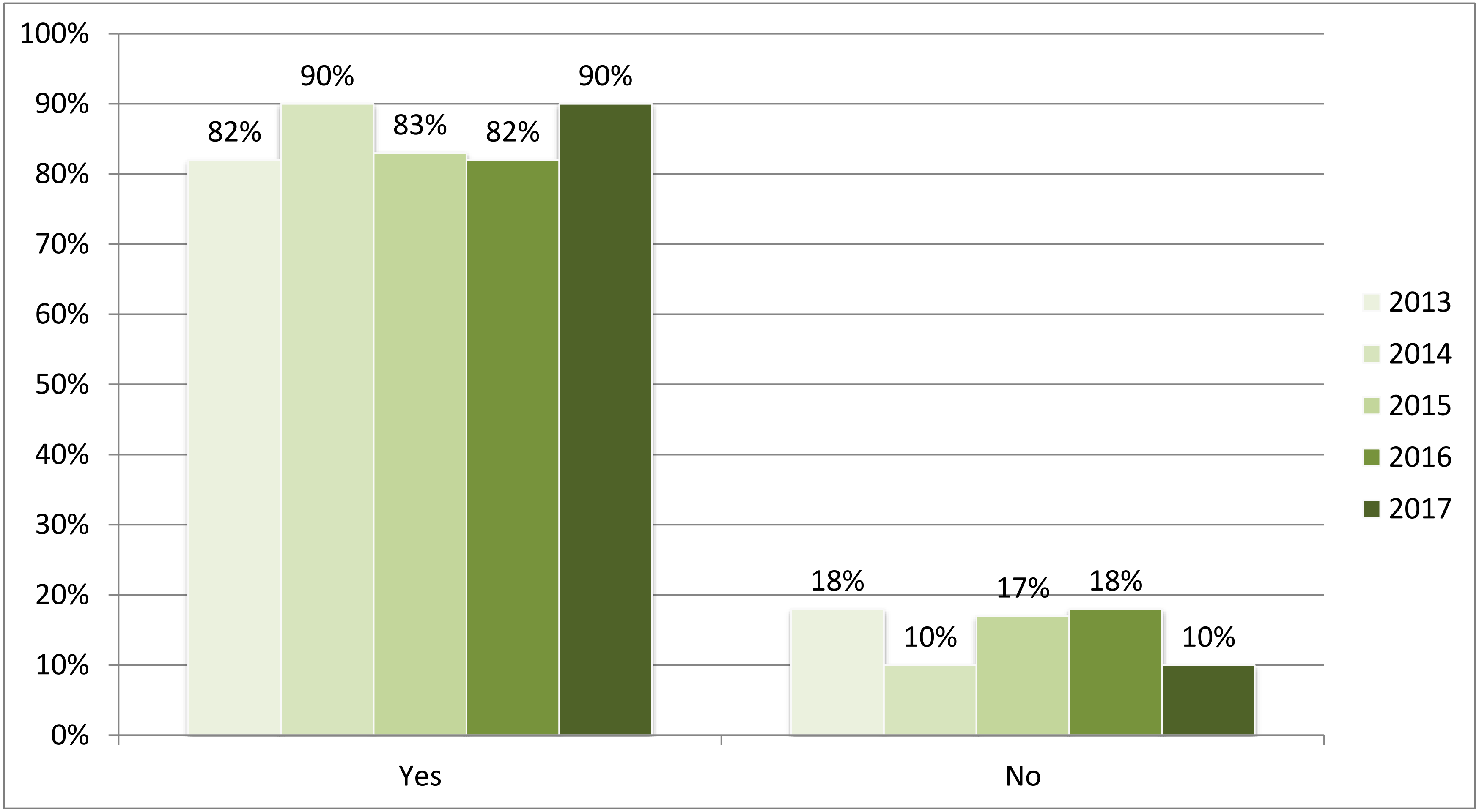
‘Attended/participated previously’ (74%, and a 10% increase) and ‘word-of-mouth’ (20%) are, once again, the most significant factors in terms of influencing people to attend the event.

Future Attendance



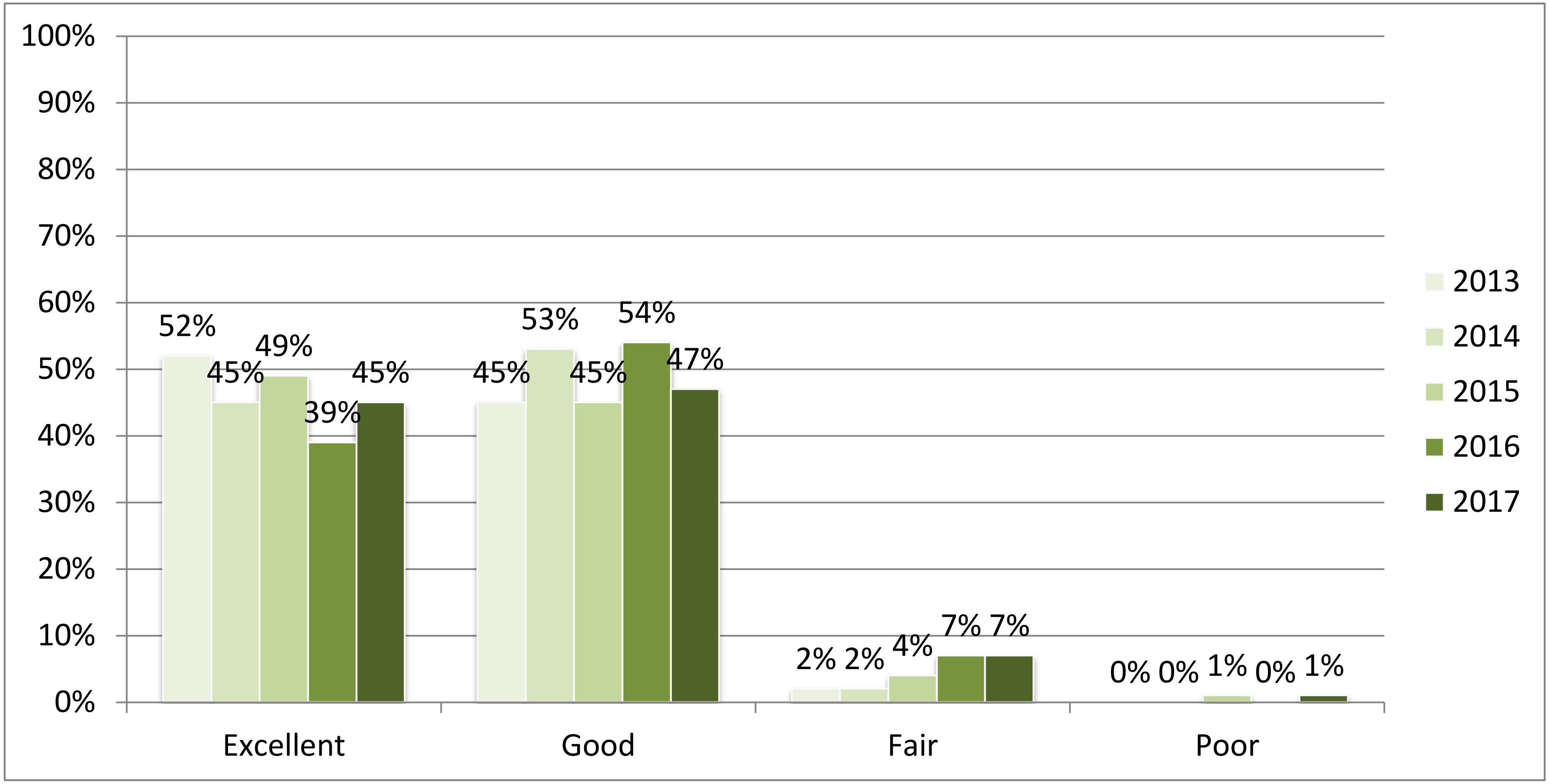
Most of the respondents (91%) indicated that they would like to attend the event again. When comparing 2017 with 2016 it is evident that the number of people who wish to attend the event in the future increased by 7%. This is a positive finding and it shows that the event is able to attract repeat visitors year-after-year.

Attended Before



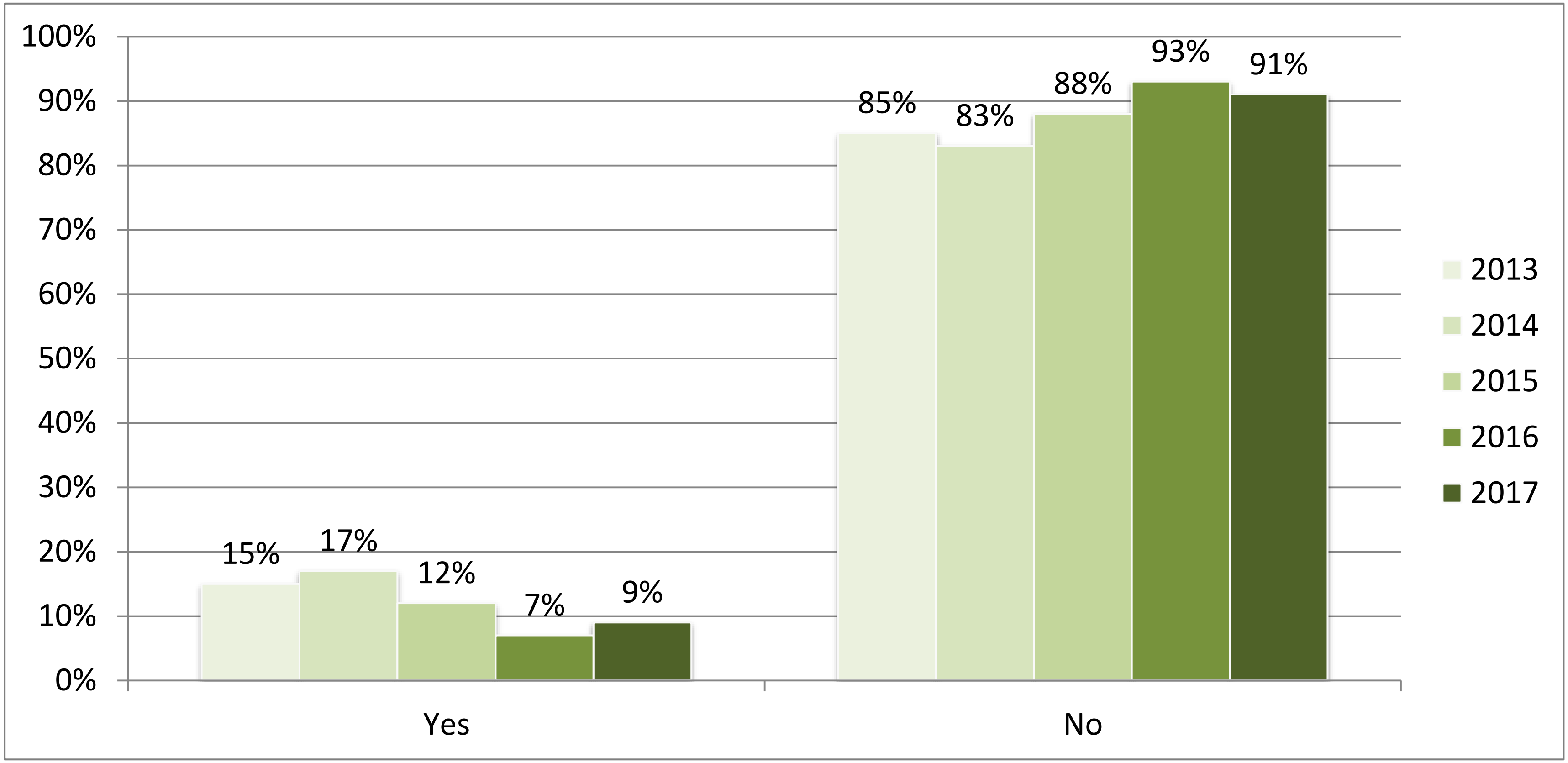
When comparing 2017 and 2016, there is a 8% increase in the number of respondents who have attended the event before – along with a decrease in those who had not. These findings show that the event still attracts repeat participation along with a steady increase in new, first-time participants.

Experience at the Event



It is positive to note that 92% of the respondents rated their experience at the event as either *Good* (47%) or *Excellent* (45%). When comparing 2017 and 2016, there was an increase (6%) in those said rated their experience as *Excellent*. However, there was a 7% decrease in those who rated their experience as *Good.* This is a positive finding not only for the organisers but for TKZN as well – satisfied tourists spend to stay longer and spend more.

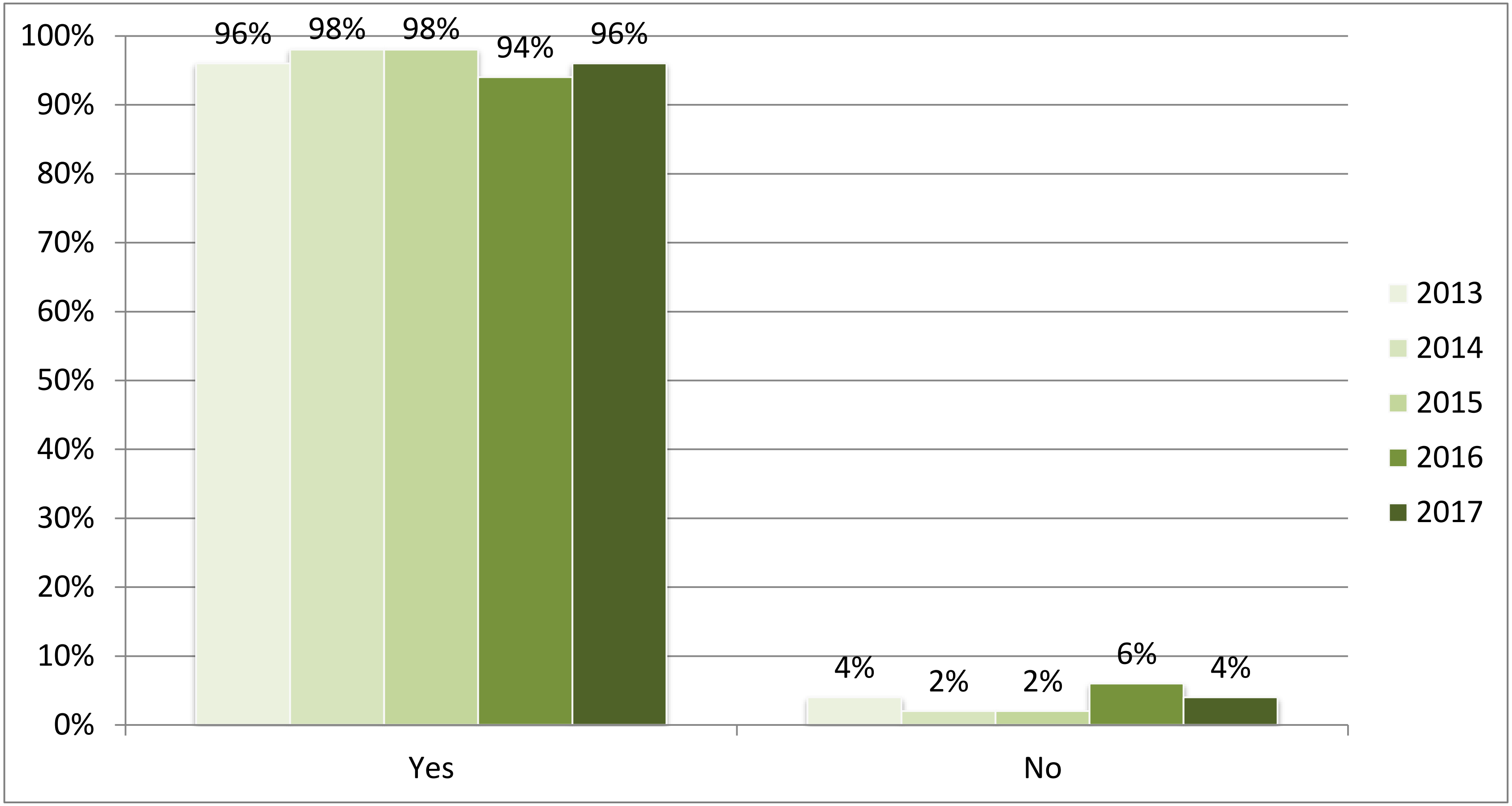
Experienced Problems?



<u>Most respondents did not experience any problems at the event. However, some of them experienced the following problems:</u>

- Parking issues
- Directions and signage was poor

Recommend the Event to Family/Friends



Most of the respondents (96%) indicated that they would recommend the event to their friends and relatives. There was a slight increase (by 2%) in the number of respondents who would recommend the event, when comparing 2017 with 2016. 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.

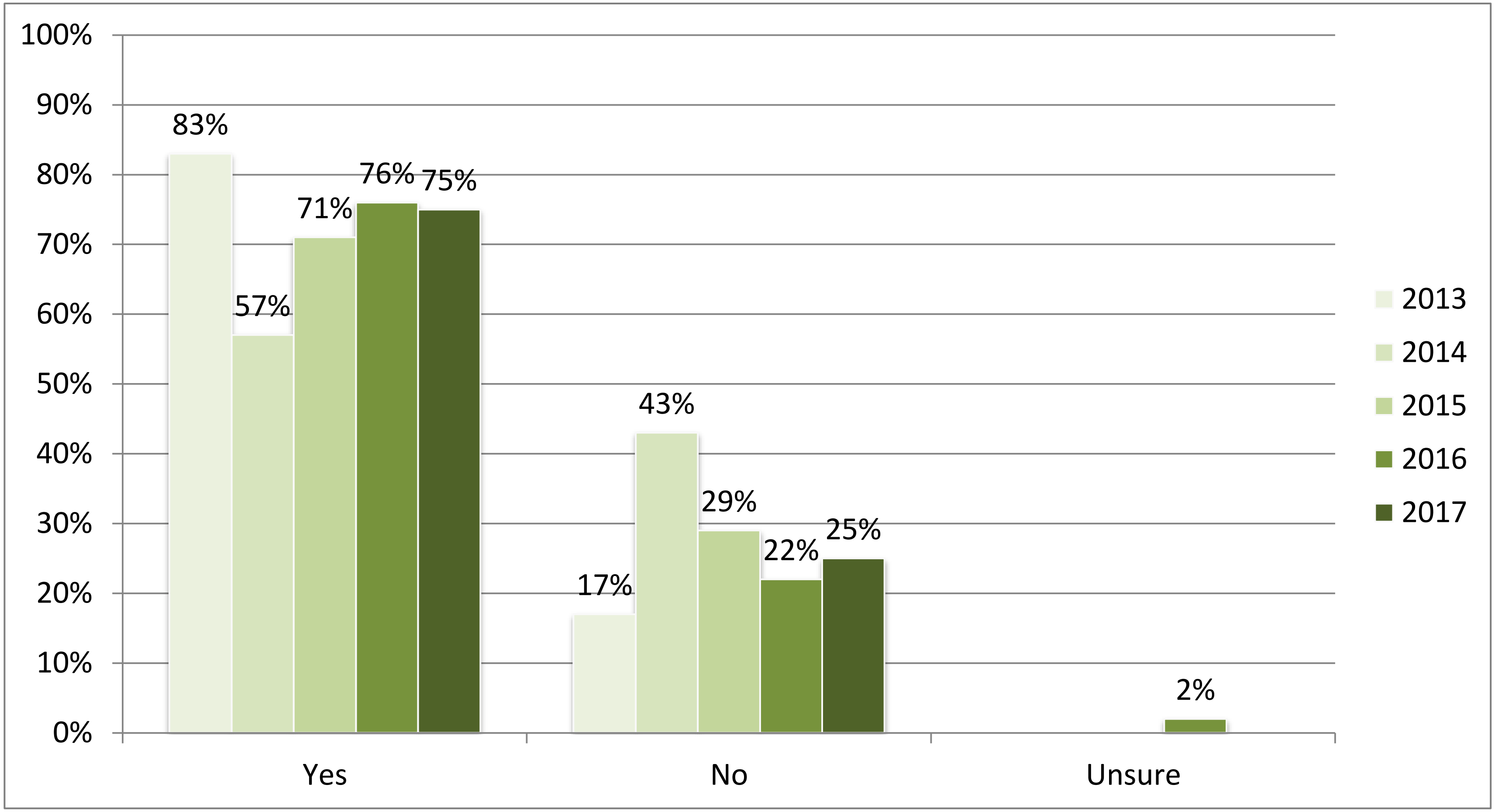
Top Suggested Improvements

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

- The majority of the respondents indicated that there is a need for improved signage (in terms of directions) along the route, and at the start and finishing areas for all spectators and seconders.

- Need for more shaded areas and shelters for spectators as well as participants once they have finished.
- More entertainment is needed, especially at the finish.
- Need to sort out the “qualifying classification”.
- Get the local communities involved more.

Plan to visit KZN in the next 12 months for a HOLIDAY?



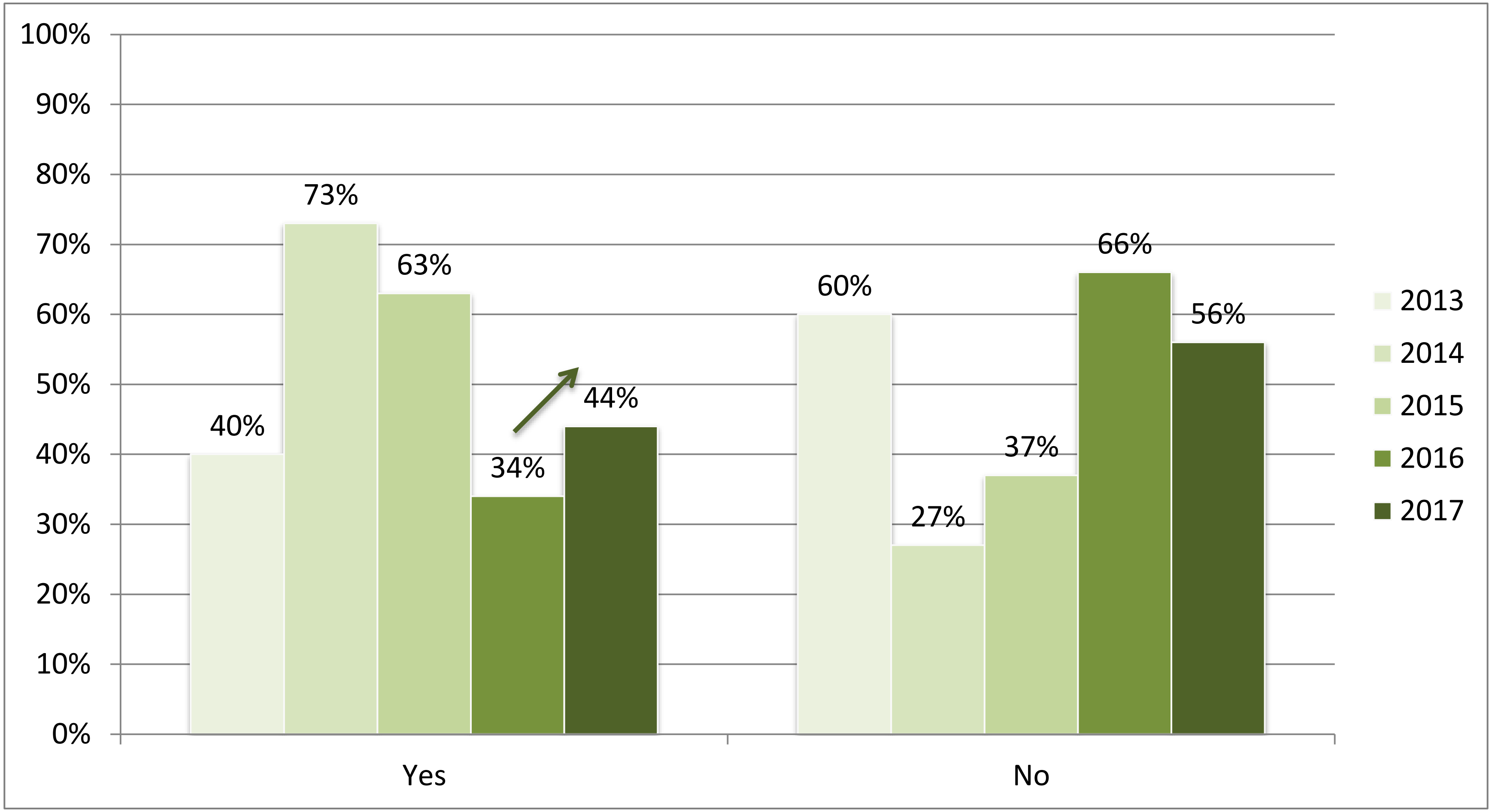
The majority (75%) of the respondents have stated that they will be visiting KZN in the next 12 months for a holiday. However, this number has still not reached the same level as 2013 (83%) yet it is an improvement from both 2014 (57%) and 2015 (71%). The option for respondents to answer 'Unsure' was only introduced in 2016 – hence the lack of comparative data.

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:

- Budget/financial constraints
- Prefer other destinations, such as the Western Cape and Mpumalanga
- Lack of time/”too busy”
- Too far to travel.

Familiar with TKZN slogan?



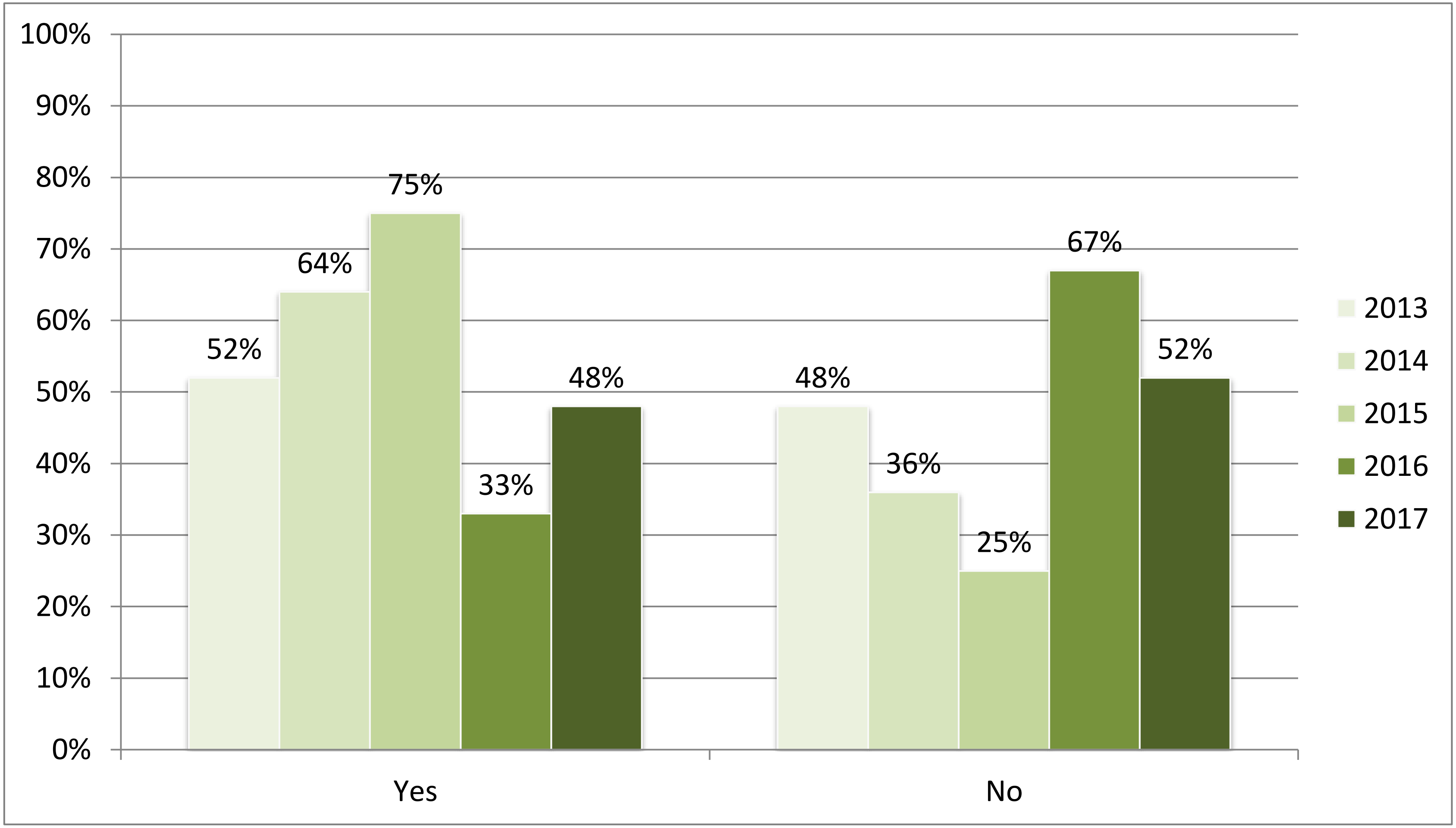
Although, there was a 10% increase in those who were familiar with the slogan, “Zulu Kingdom. Exceptional.”, the majority (56%) were still unfamiliar with it. This shows that the respondents are not aware of TKZN’s branding or there is no awareness thereof.

Associations – TKZN slogan: Core Mentions

Association	2013	2014	2015	2016	2017
Tourism/Holidays	18%	6%	4%	**14%**	**23%**
Zulu Heritage/Culture/King Shaka/Zulu People	**26%**	**81%**	**37%**	**50%**	**27%**
TKZN/Tourism Organisation	1%	3%	3%	6%	2%
KwaZulu-Natal	23%	22%	7%	8%	**28%**
Don't Know/Unsure	9%	3%	3%	26%	12%
Durban	1%		1%	0%	2%
People from KwaZulu-Natal	-	5%	**15%**	2%	-
Other	14%	17%	9%	-	12%

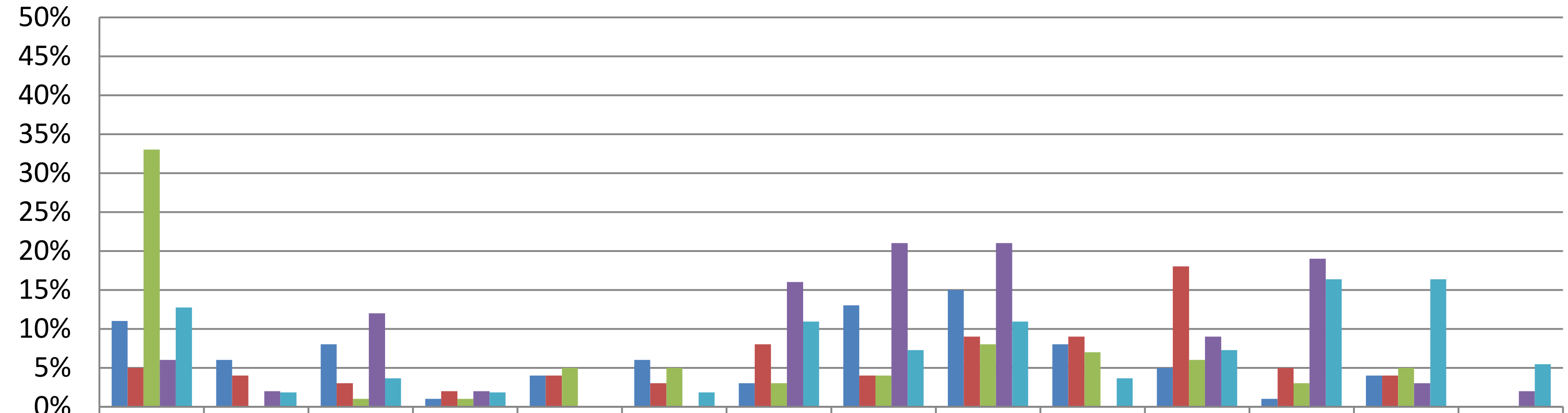
The majority of the respondents associated the slogan with “KZN” (28%) and with aspects to do with “Zulu Heritage” (27%). It is positive that note that the association with “Tourism/Holidays’ increased by 9% (from 14% in 2016 to 23% in 2017).

Noted TKZN logo?



Just like the slogan, there has also been an increase (by 15%) in the number of respondents who have noted the TKZN logo before. However, the majority of the respondents still had not seen the logo before.

Where TKZN logo noted?



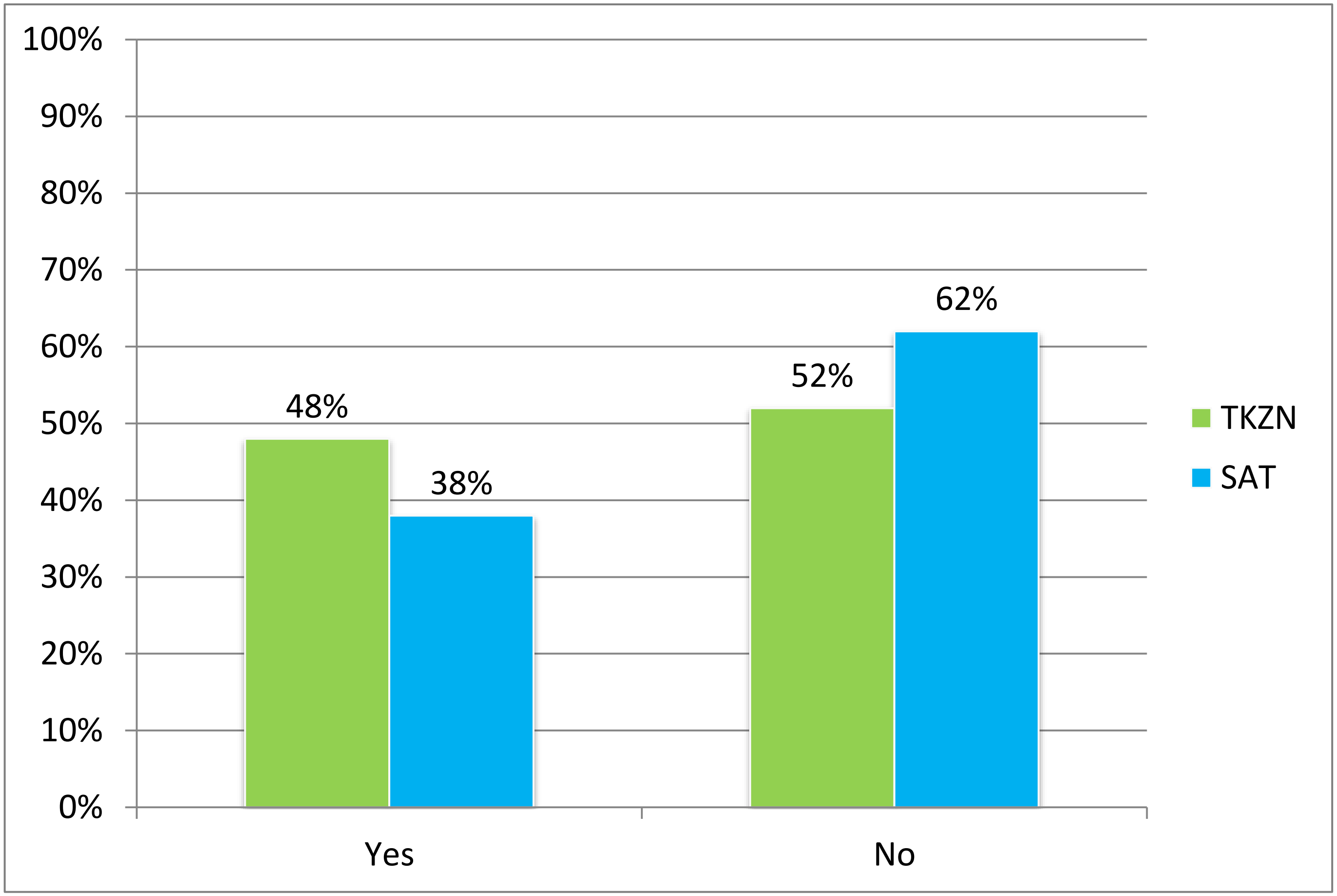
	Billboards/posters/banners	Brochures	Magazines	Newspapers	Clothing/Merchandise	Tourism Information Office	Internet	TV	Other/ Cannot Recall	Durban	Airport	Events	Attractions (e.g. uShaka)	Accommodation
2013	11%	6%	8%	1%	4%	6%	3%	13%	15%	8%	5%	1%	4%	0%
2014	5%	4%	3%	2%	4%	3%	8%	4%	9%	9%	18%	5%	4%	0%
2015	33%	0%	1%	1%	5%	5%	3%	4%	8%	7%	6%	3%	5%	0%
2016	6%	2%	12%	2%	0%	0%	16%	21%	21%	0%	9%	19%	3%	2%
2017	13%	2%	4%	2%	0%	2%	11%	7%	11%	4%	7%	16%	16%	5%

When comparing 2017 with 2016, there has been an increase in the number of respondents who saw the logo on *billboards/posters/banners* (by 7%), at *accommodation* establishments (by 3%) and at *attractions* (by 13%). Along with this, there has decrease in the number noting the logo in *magazines* (by 8%), on the *internet* (by 5%), on *TV* (by 14%), and at *events* (by 3%).

Where TKZN logo noted? (Cont'd)
Top 5 places where the logo is noted

2015	2016	2017
Billboards/posters/banners	Magazines	Events
In and around KZN	Internet	Attractions (e.g. uShaka)
Airport	TV	Billboards/Posters/Banners
Tourism Information Office	Events	Internet/Social Media
Accommodation establishments	Airport	"Not Sure"

TKZN vs SAT Logo



TKZN

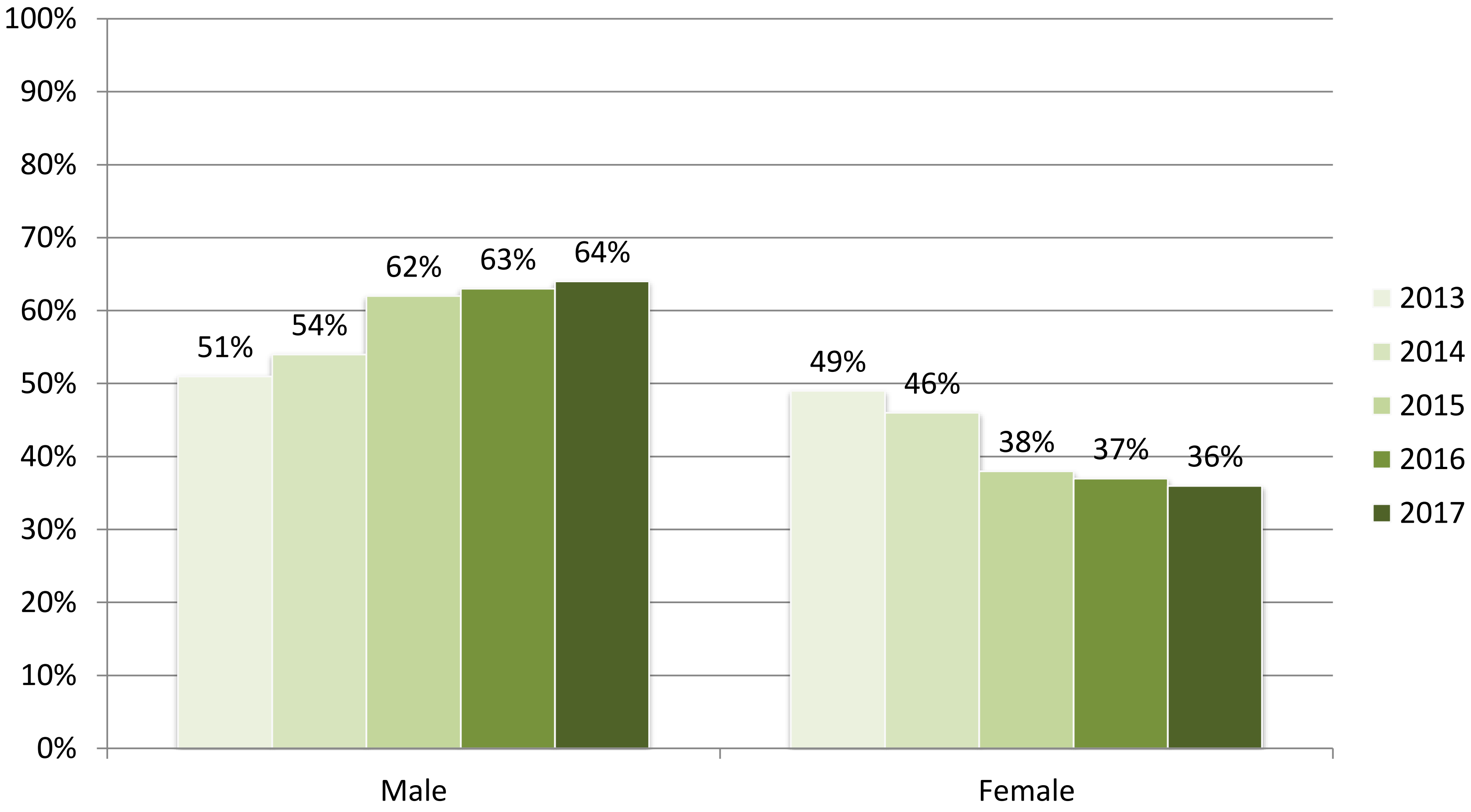
Zulu Kingdom. **Exceptional**

SAT

Inspiring new ways

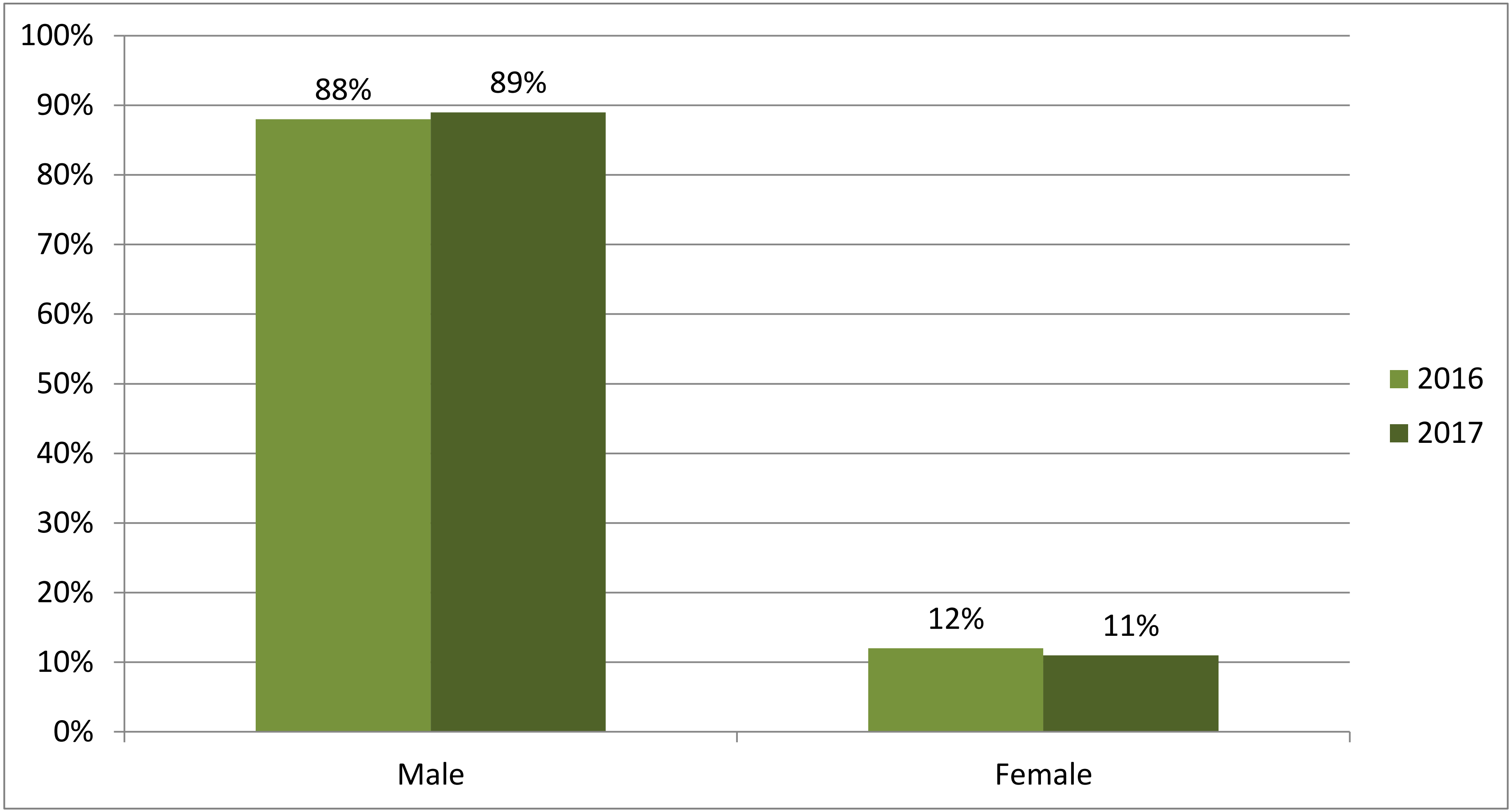
In 2017, the respondents were asked if they had either the TKZN or the SAT logo. Although there is a slight difference, more people had noted the TKZN than the SAT logo – even though look very similar.

Demographics: Respondent's Gender



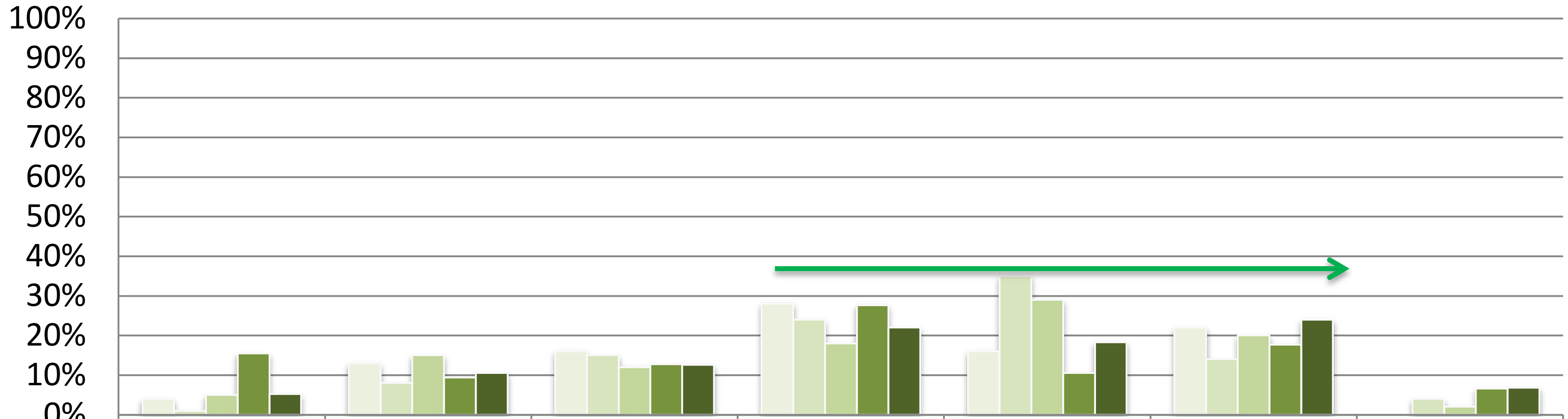
Between 2013 and 2017, a the number of male respondents has continued to increase while the number of female respondents has decreased. However, there was only a slight increase of male respondents, and a slight decrease of female respondents, when comparing 2017 with 2016. It is therefore seems that canoeing is a male dominated sport.

Demographics: Participant's Gender



Following on from the previous slide, the graph above depicts the actual proportion of the number of male participants compared to the number of female participants who took part in the event in 2016 and 2017. This data confirms that there is a definitely a higher number of males who attended the event in the last two years (2016 and 2017).

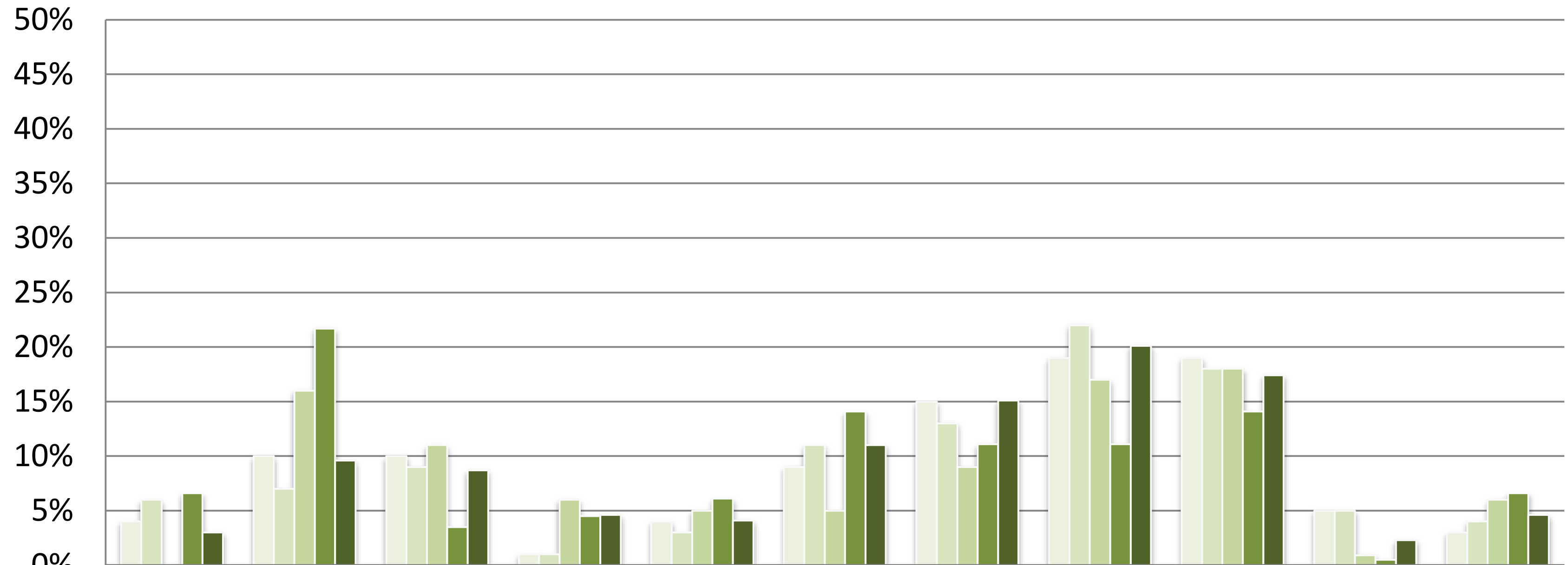
Demographics: Income Level



	<R1 000	R1 000-R5 000	R5 001-R10 000	R10 001-R20 000	R20 001-R30 000	R30 001+	Other
2013	4%	13%	16%	28%	16%	22%	0%
2014	1%	8%	15%	24%	35%	14%	4%
2015	5%	15%	12%	18%	29%	20%	2%
2016	16%	9%	13%	28%	11%	18%	7%
2017	5%	11%	13%	22%	18%	24%	7%

Some 65% of the respondents earn a monthly income of R10 000 or more, with the majority earning *R30 001+* (24%), and between *R10 001 – R20 000* (22%). The respondents who noted *Other* (7%) as their income are those who did not wish to supply this information. There was an increase in those who earn *R20 001 – R30 000* (by 7%) and those who earn *R30 000+* (by 6%). These findings point clearly to a select target market.

Demographics: Occupation



	Unemployed	Student/scholar	Retired	Labour/unskilled	Artisan/technician	Sales/marketing	Administration/manager	Professional e.g. doctor	Self-employed	Home-executive	Other
2013	4%	10%	10%	1%	4%	9%	15%	19%	19%	5%	3%
2014	6%	7%	9%	1%	3%	11%	13%	22%	18%	5%	4%
2015	0%	16%	11%	6%	5%	5%	9%	17%	18%	1%	6%
2016	7%	22%	4%	5%	6%	14%	11%	11%	14%	1%	7%
2017	3%	10%	9%	5%	4%	11%	15%	20%	17%	2%	5%

Main Findings

1. The majority of the respondents were visitors to the area in which the event was taking place (53%). There was a decrease in the proportion of respondents who were local residents (by 28%). It was positive to note that 25% of all respondents stayed overnight during the event.

2. The majority of the respondents were from KZN (75%), while 18% were from Gauteng, and 5% were from the Western Cape. There was an increase of respondents from KZN (by 9%) and a decrease in those from Gauteng (by 7%).

3. The number of international participants still stood at 2% (18) of the total number.

4. The average total spend of the respondents had increased from R1 420 in 2016 to R2 049 in 2017. This increase was mainly driven by an increased accommodation spend.

5. Due to the increased spend, the total economic impact of the event had increased. In 2017, it was estimated that the economic impact was worth at least **R6,4 million** and as much as **R9,1 million**.

Main Findings

6. The majority of the respondents stayed in the area of the event for either 3 nights (31%) or 4 nights (20%), thus meaning the average length of stay was 3.5 nights. There was a decrease in the number who stayed for 4 nights or more than 4 nights, and an increase in those who stayed for 1 night or 2 nights.

7. Most of the respondents stayed with friends or relatives (36%), while 22% stayed in a B&B, 20% camped, and 9% stayed in a family hotel.

8. The majority of the respondents were spectators (60%), while 36% were participants. The main reason for this is because the participants felt less inclined to answer the questionnaires as they were tired after 3 days of paddling.

9. Once again, a large amount of the respondents either used their own vehicles (73%) or a rental vehicle (17%) to travel to the area in which the event was taking place.

10. Almost all of the respondents were influenced to attend the event either by attending before (74%), or from "Word-of-Mouth" (20%).

Main Findings

11. Some 91% of the respondents mentioned that they would be attending the event in future. This was a 7% increase when comparing 2017 with 2016. 8% of the respondents were not sure if they would attend again.

12. In terms of those who had attended before, 90% indicated that they had. This was an 8% increase in this number, when comparing 2017 with 2016.

13. It was positive to note that 92% of the respondents had either a "Good" (47%) or "Excellent" (45%) experience at the event. There was a 6% increase in those who had an excellent experience.

14. Over 90% of the respondents did NOT experience any problems at the event in 2017. The minority who did experience problems noted that "parking" and "directions/lack of signage" were the problems that they experienced.

15. It was positive to note that 96% of the respondents would recommend the event to the their friends and relatives.

Main Findings

16. Some of the respondents noted the following as suggestions for improving the event in future:
    - Improved signage and markings for directions
    - Shaded areas and shelter (at the finishing areas)
    - Entertainment
    - Involve the local communities

17. It was positive to see that 75% of the respondents said that they plan to visit KZN, in the next 12 months, for a HOLIDAY, while 25% said that they do NOT. Some of the reasons for NOT travelling to KZN include:
    - Budget/financial constraints
    - Prefer other destinations
    - No time/too busy

18. Only 44% of the respondents were familiar with TKZN's slogan, "Zulu Kingdom. Exceptional." However, this figure had increased by 10% when comparing 2017 with 2016.

Main Findings

19. Most of the respondents associated the slogan with "KZN" (28%), "Zulu Heritage" (27%), and "Tourism/Holidays" (23%). It was positive to see that there was a 9% increase in those who associated the slogan with a holiday.

20. Only 48% of the respondents had previously noted the TKZN logo before. However, this number had increased by 15% in 2017. Most of the respondents noted the logo at *Attractions* (16%), *Events* (16%), and on *Billboards/Posters/Banners* (13%).

21. In terms of demographics, the following was noted:

- **Respondent's** Gender – 64% were male and 36% were female
- **Participant's** Gender – 89% were male, while 11% were female.
- Over 64% of the respondents earn R10 000 or more per month.
- There was a wide spread of occupations, with the majority being Professionals (20%) or Self-Employed (17%).

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**:

1. Based on the comments from the respondents, it is recommended that an increased amount of signage or a new set of direction markers should be implemented at the event in future. A select number of respondents mentioned this issue and it is therefore recommended that it is considered.

2. A wider variety of food stalls, especially ones for the more "health conscious" (for e.g. banting or sugar free options). A lot of participants, at sporting events these days, are not in favour of a greasy meal after strenuous exercise. Also, a few respondents noted that they would like other food options, "other than Spur again".

3. More entertainment options for both adults (live music) and kids (jumping castles etc.). This way, people are then encouraged to stay for longer periods and are considered to be happier if there is something happening. The longer that people stay, and the happier that they are, the more money they could spend – thus, improving the economic impact of the event.

Recommendations

4. The organizers, as well as TKZN, could seek partnerships with the hospitality sector/accommodation establishments in order to encourage more people to stay in the province for a longer period or even if it is just for the 4 nights surrounding the event. In other words, if people are offered a discount or a special package deal if they are taking part in the Dusi, then more people may be inclined to book a holiday or their stay to surround the event. An example of an event that does this is the Tsogo Sun Amashova Durban Classic (i.e. Tsogo Sun offers accommodation options for the entrants).

5. It is recommended that incentives should be offered for participants from outside of the province. For example, and in keeping line with the point above, if a person has entered the race, their family will get a 50% discount at your hotel. Other incentives should be “brainstormed” – this way, more people would then feel inclined to attend the event. This is very important when considering how certain factors that are uncontrollable, such as the drought, can be overcome or even temporarily resolved.

Recommendations

6. It has also been revealed[1] that there seem to be two major issues surrounding the drop in participant numbers – the costs and fees involved in paddling as well as the water quality (and levels) of the rivers on the course. In view of this, the recommendations are as follows:
   i. Although it seems quite drastic, it has come to the point where the river(s) that are used for the event may need to be revaluated or reconsidered. For example, the case would be similar to that of the Dakar Rally whereby certain issues resulted in the event being moved from Africa to South America. Thus, it could be considered that the event could move to a course along river systems such as the Tugela or Umzimkulu rivers. Not only would this rivers have higher levels, but their quality would be better due to their locations (outside of major urban areas).
   ii. It is also recommended that the system which governs the costs and fees involved in canoeing as a sport be revaluated as paddlers may be put off by the high costs involved. One way to combat this would be to introduce the "temp" license system whereby non-club paddlers could enter the race and pay only race fees and license fees – thus saving on the costs of joining a club and entering other races in the paddling season.

[1]This recommendation has originated from a discussion with **Stu Berry, from Impi Concept Events**, relating to the Dusi Canoe Marathon and the Drak Challenge and the attendance at both of these events.

Recommendations (cont'd.)

In addition to this, the researchers recommend the following for **TKZN**:

1. Awareness campaigns are needed where TKZN promotes the awareness of the slogan and logo via tradeshows, advertising and social media.

2. More needs to be done to create a link between the slogan/logo and holidays/leisure in KZN. For example, the slogan can be introduced into promotional material that encourages holidays or it can be combined with catch phrases such as, "come and relax in the exceptional, Zulu Kingdom".

3. Assist the event organizers to promote other activities and attractions in the area of which the event is taking place. For example, a professional list of 'things to do' or activities can be supplied in the race packs and be handed out at the event.

4. The marketing team needs to collaborate with the organizers in order to attract more international participants. One example of achieving this is to attend various road shows, or something similar, with the organizers to reach out to the international markets.

Recommendations (cont'd.)

Continued…

4. The research team needs to refine the strategy for talking to participants, especially on day 3 (finish). The reason for this is because many of the participants are tired and do no want to answer questionnaires. One suggestion is that the organisers could send out a link to an the online survey to the participants via an email database (which is obtained from entering/registering at the event).

5. The fieldworkers had to be trained to identify people at the event, who are there specifically for the event. The nature of the locations for the event are such that people can just wander in and spectate. These people will have no impact on the event and should therefore be "ignored". This could be achieved by introducing a "qualifying question" – i.e. Have you travelled here for the Dusi Canoe Marathon?