

KZN Travel and Adventure Show 2017 Attendee Survey Top Line Summary Report



Richard Wyllie
Karen Kohler
Tourism KwaZulu-Natal
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Positive Highlights



- 85% of the respondents indicated that the show was useful.
- 75% of the respondents indicated that the show would help them make better travel decisions.
- 75% of the respondents indicated that they would attend the show in future.
- 87% indicated that they had an excellent or good experience at the show.
- 96% did NOT experience any problems at the Show.
- 93% of the respondents would recommended the Show to their friends and family.
- 65% of the respondents has seen the TKZN logo before.

Methodology



- Face-to-face survey with a probability sample of **222** consumer respondents over 4 days of the event, i.e. from the 6 -9 July 2017.
- Respondents were systematically selected throughout the 4-day period of the event, i.e. the final weekend of the 10-day event.
- Made use of 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.

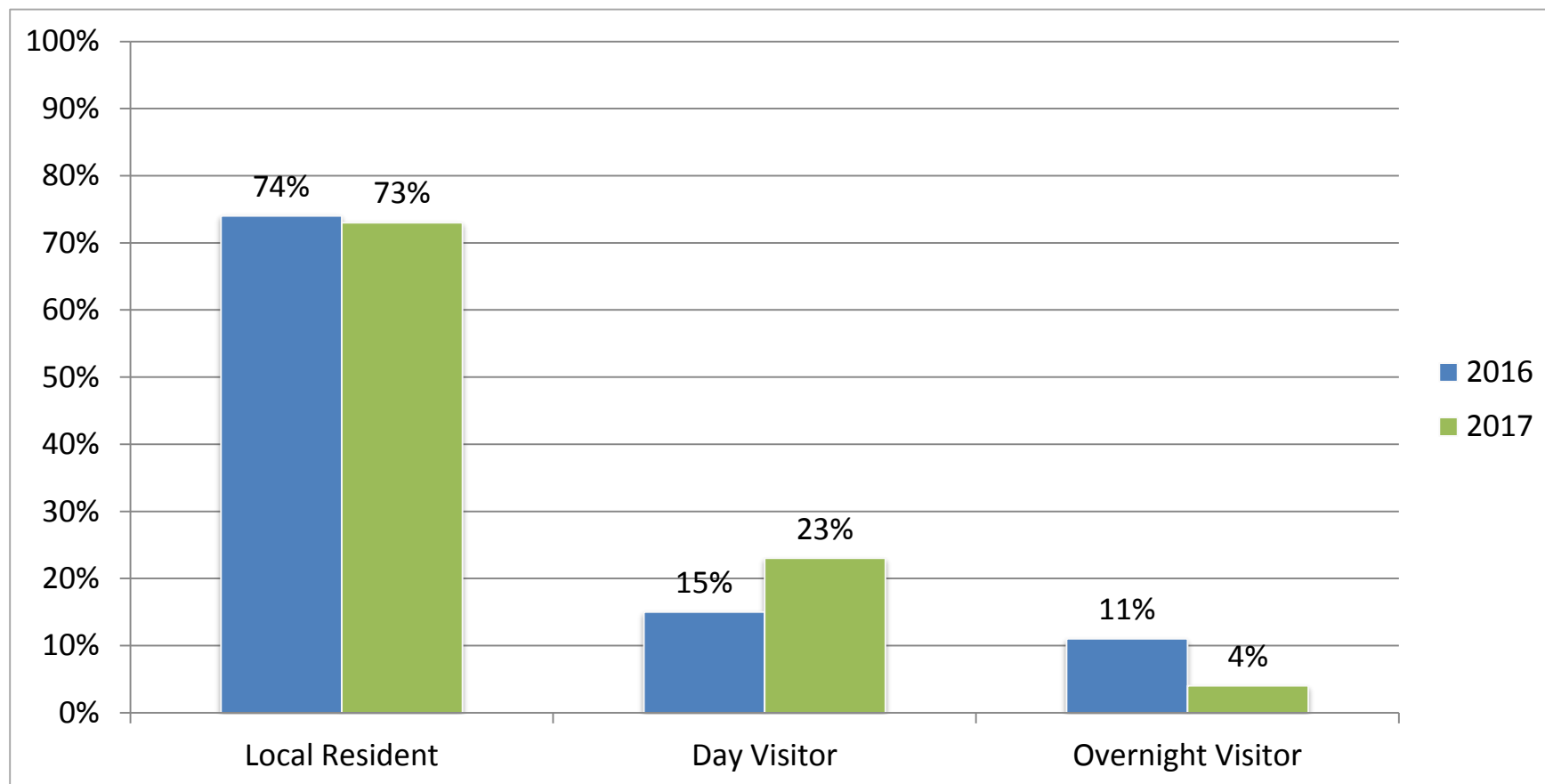
100 people in a room – safe with 40-50 surveys.

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

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

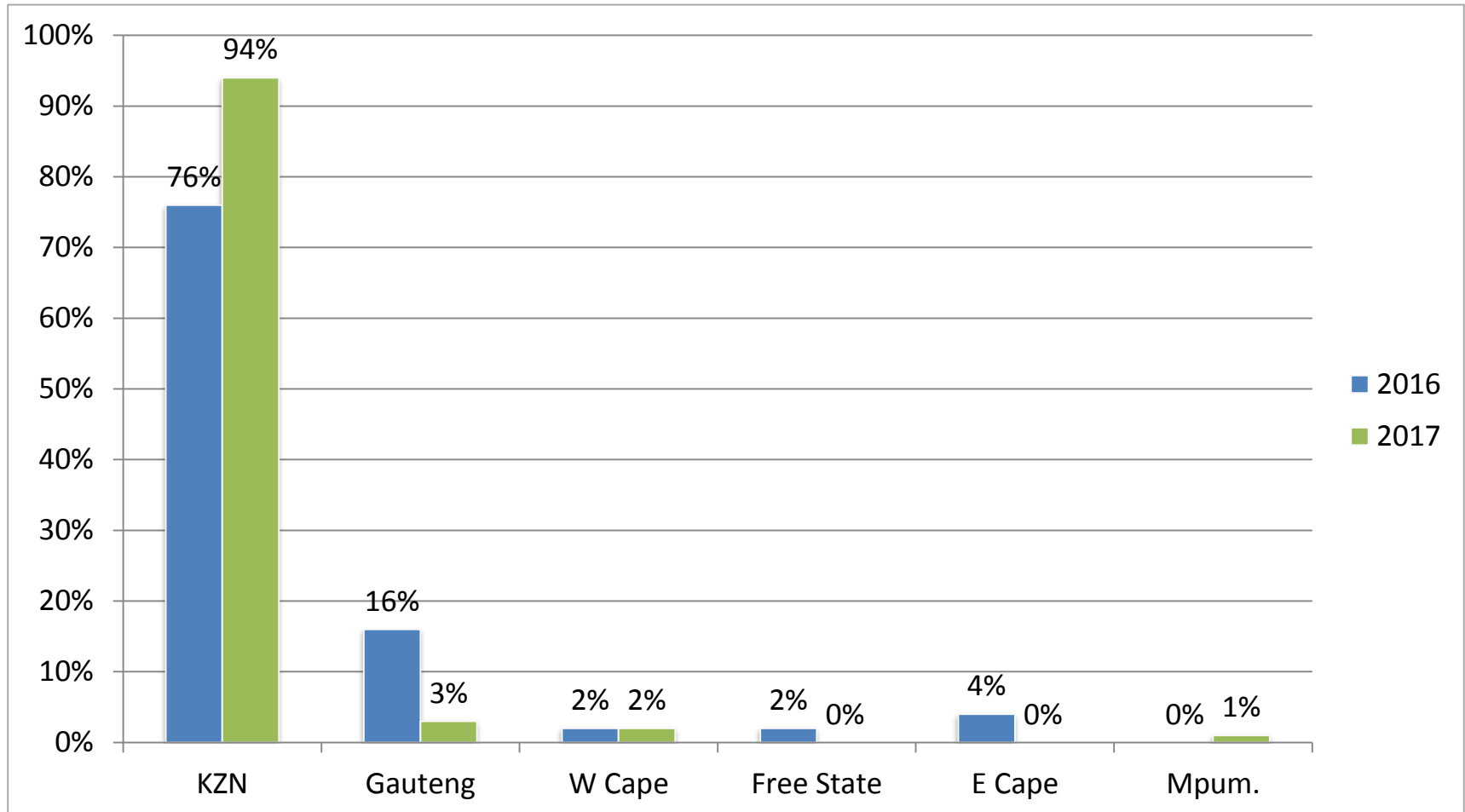
i.e. If the sample size grows to more than 400 (in relation to the population), any addition to the sample size **becomes statistically irrelevant**.

Nature of Respondents



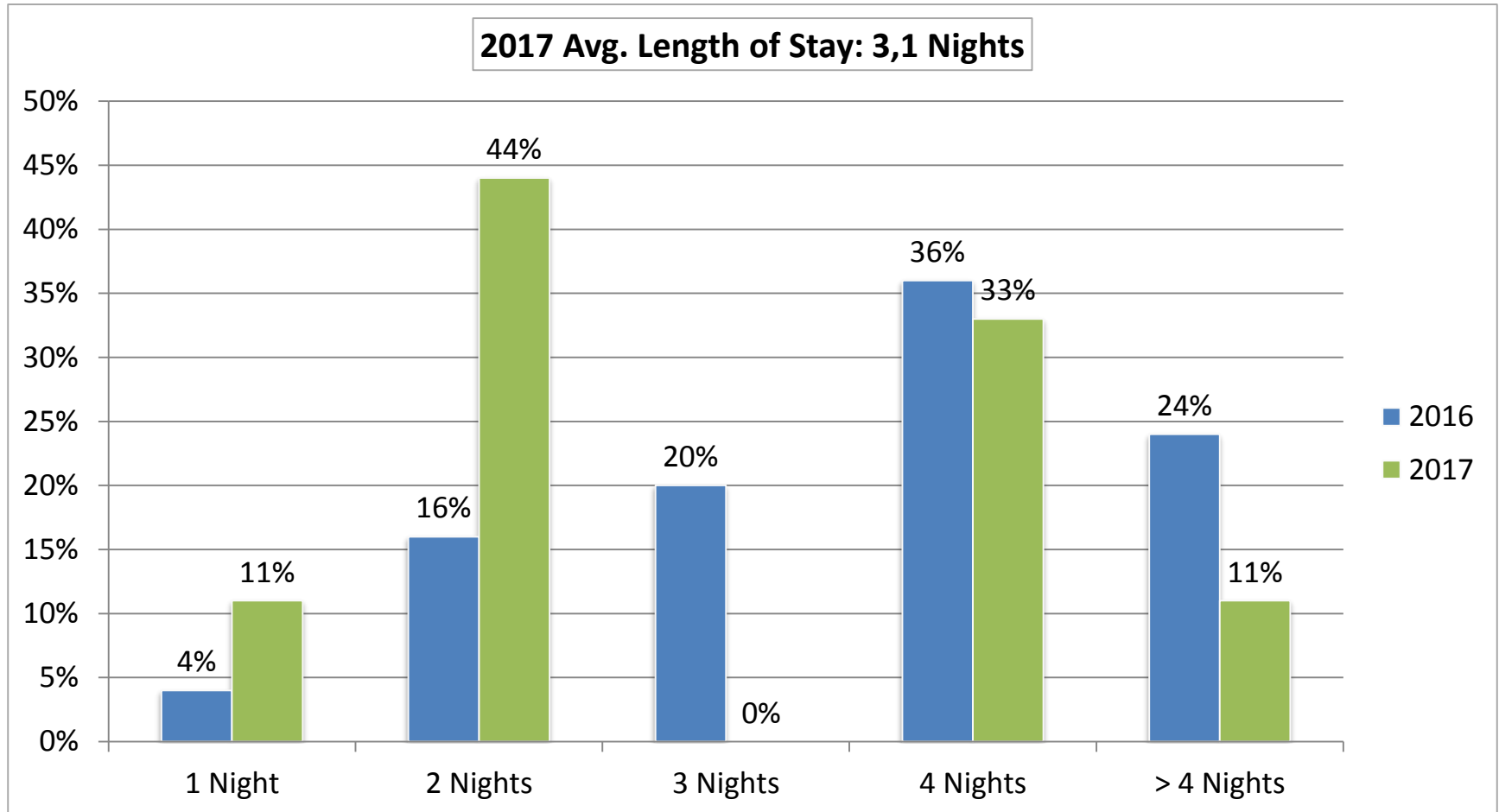
Once again, the majority of the respondents were local residents (73%) to the Durban area. In 2017, there was an increase in the number of day visitors (by 8%) and there was also a decrease in the number of overnight visitors (by 7%). The event remains as a local event, but this is not as negative as it seems (see 'Findings'). It was also noted, by the organizers, that the overall attendance at the event had increased by 7% in 2017.

Province of Origin



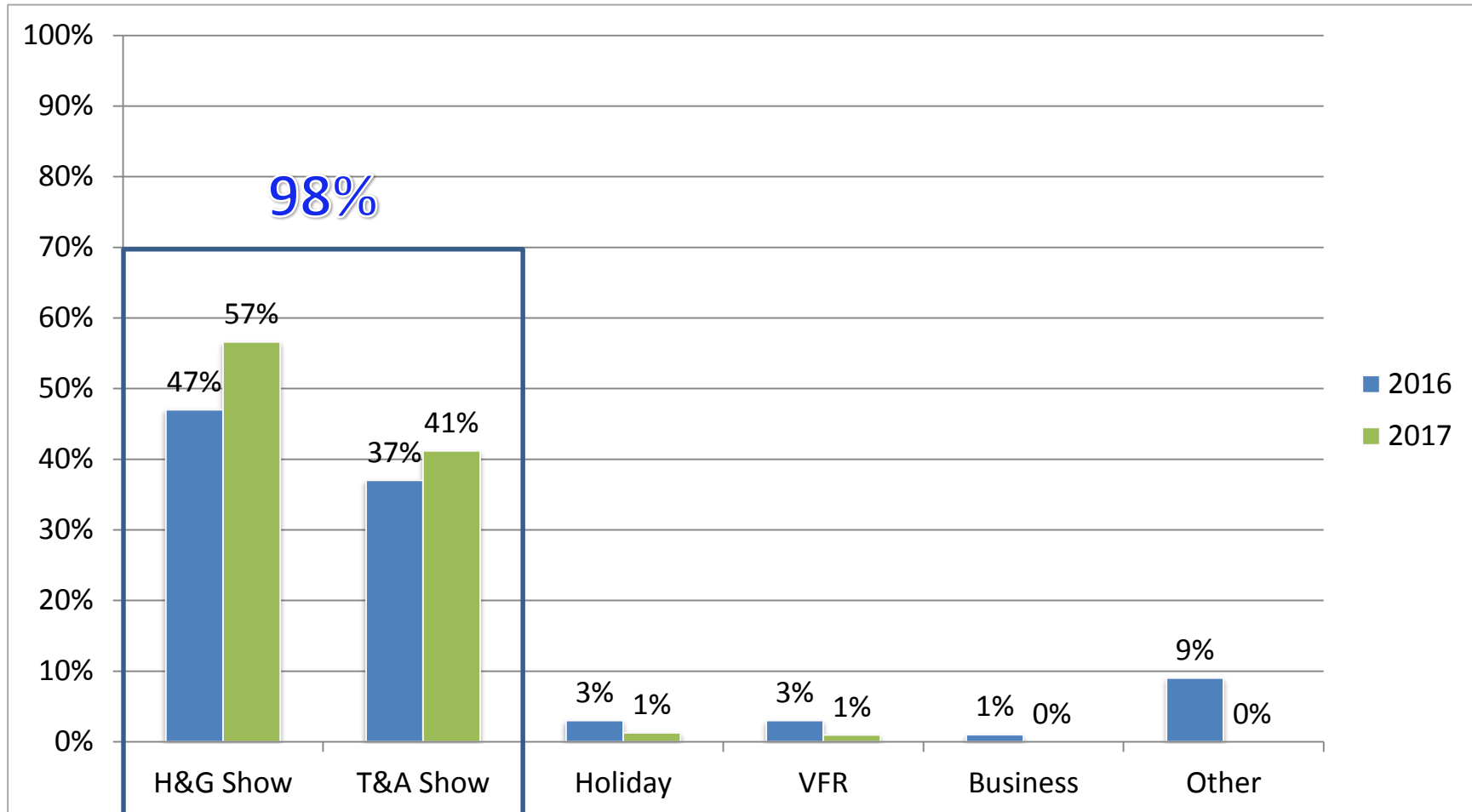
As expected, most of the respondents were from KZN (94%), and this was followed by 3% who were from Gauteng, and 2% from the Western Cape. The attendance by respondents from other provinces, is likely to have been a result of the show being held during the school holidays.

Length of Stay: Overnight Respondents



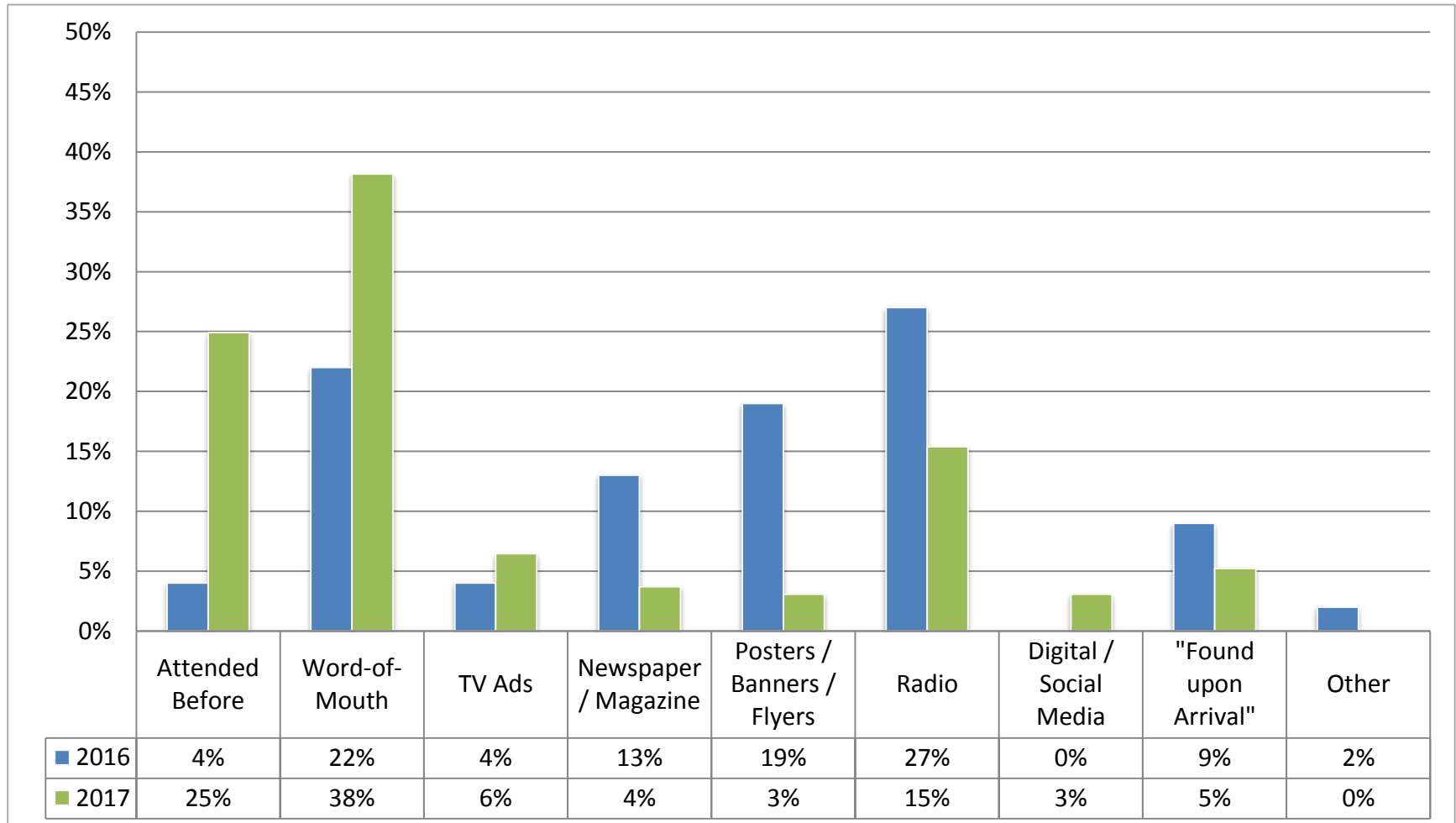
Although the sample size of the overnight visitors was much smaller in 2017, the data was still used to form a comparison between 2017 and 2016. It is evident that most of the overnight respondents stayed for average of 3.1 nights during their time in the area of the event.

Primary Purpose (of being in Durban)



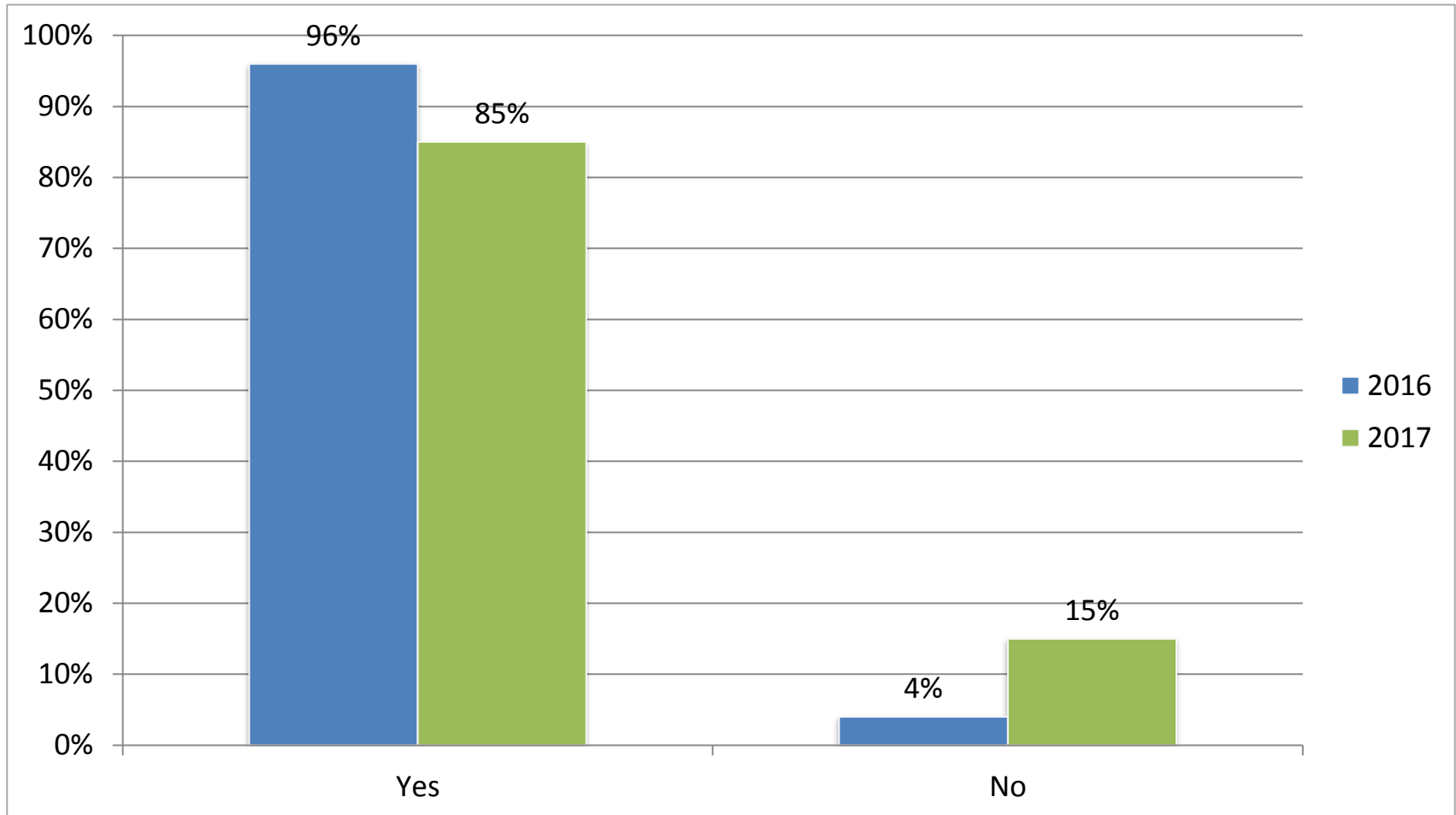
Once again, almost all of the respondents were attending either the House and Garden Show (57%) or the Travel Adventure Show (41%). There was an increase of 10% in those who attended the H&G Show and an increase of 4% of those who attended the T&A Show.

Influenced to Attend?



Most of the respondents attended the show due to their previous attendance (25%) or through “Word-of-Mouth” (38%). This was followed by those who had heard about the show on the radio (15%) These findings show that more needs to be done in terms of the marketing and advertising of the event.

Was the Show useful?



Of those respondents who attended the Travel and Adventure show, 85% indicated that the show was useful. There was however a 11% increase in those who did NOT find the show useful and this would need to be addressed in future planning for the show.

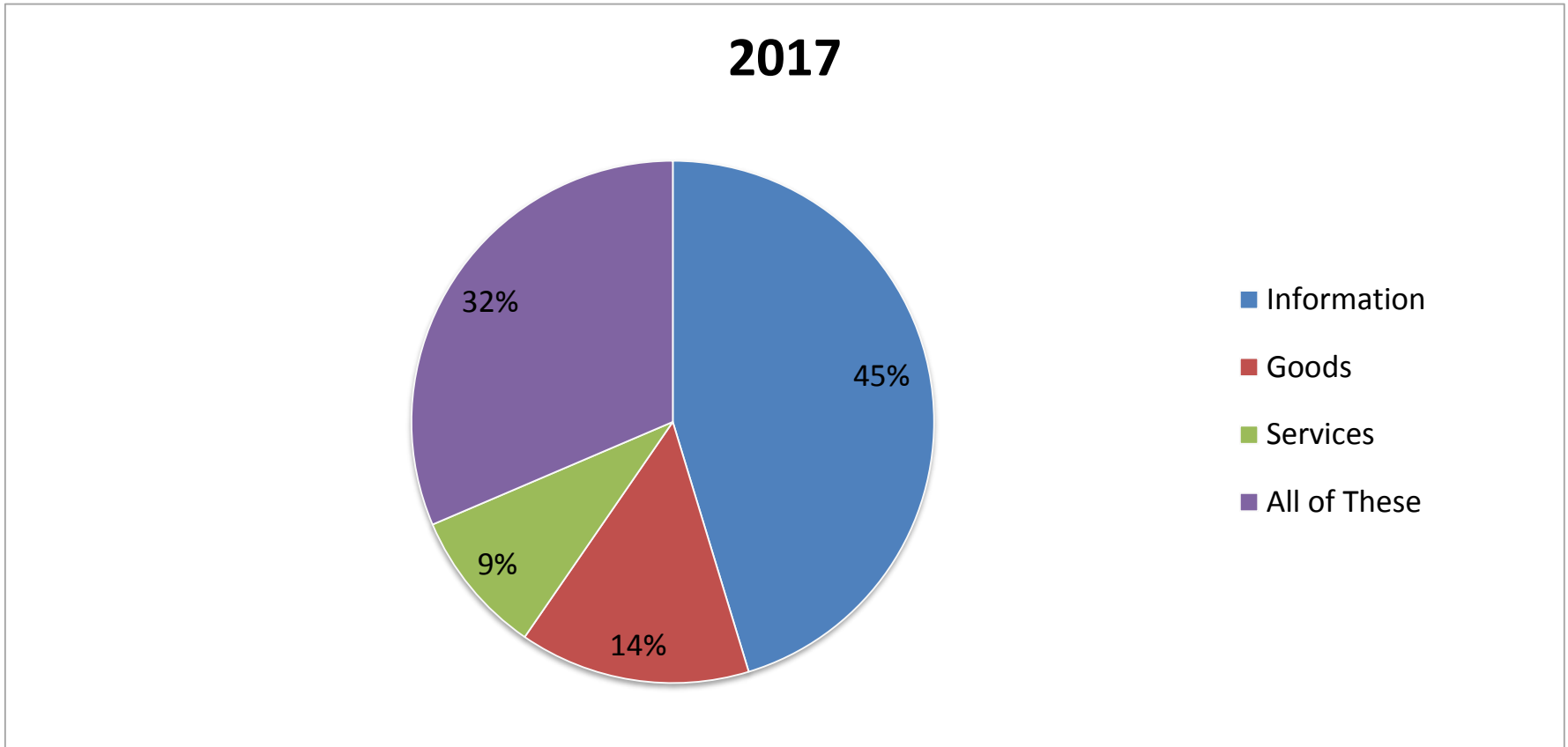
Was the Show useful – What was useful?



For those who found the Show to be **useful**, they listed the following reasons:

- Range of products available
- Introduction to new holiday destinations
- New attractions
- Good ideas for holidays
- Information about tourism
- Services on offer
- Exposing the locals to new places to visit

What were you looking for?



In 2017, the respondents were asked what they were looking for at the T&A Show. It was noted that 45% were specifically looking for 'Information', while 14% were looking for 'Goods' and 9% were looking for 'Services'. Furthermore, 32% of the respondents were looking for all of these at once. This question was only introduced in the 2017 survey. The 'information' that the respondents were looking for could have been ideas on what to do and where to do it in terms of adventure tourism in the province.

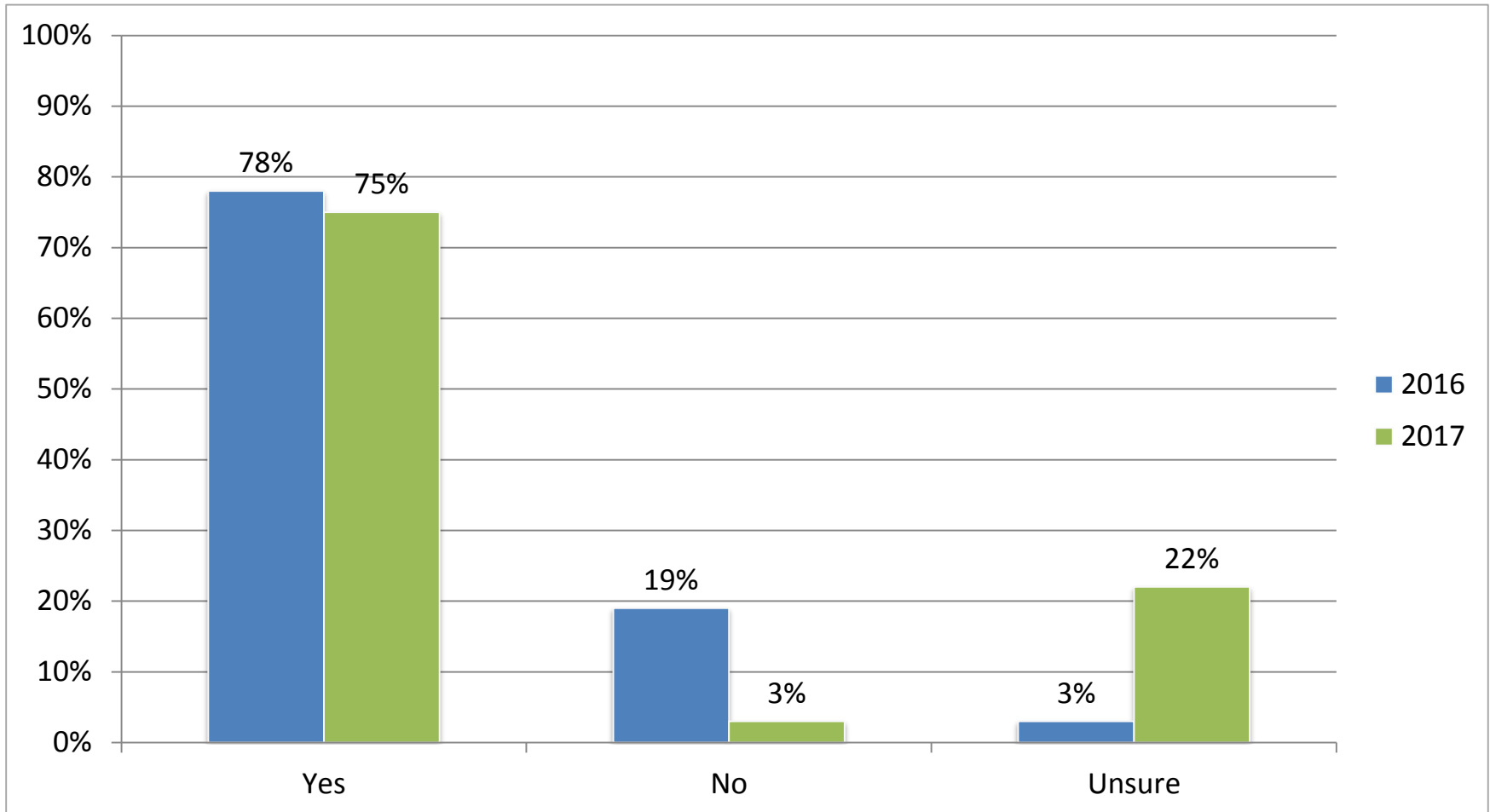
What were you looking for? – Goods / Services / Information



Goods	Services	Information
<i>No relevant responses were recorded.</i>	<i>No relevant responses were recorded.</i>	Accommodation establishments
		Attractions
		Holiday resorts
		Museums
		Holiday packages
		Prices of holidays
		Tour guides
		Battlefields

The table above shows that all of the respondents were in search of information on aspects such as accommodation, attractions, and tours.

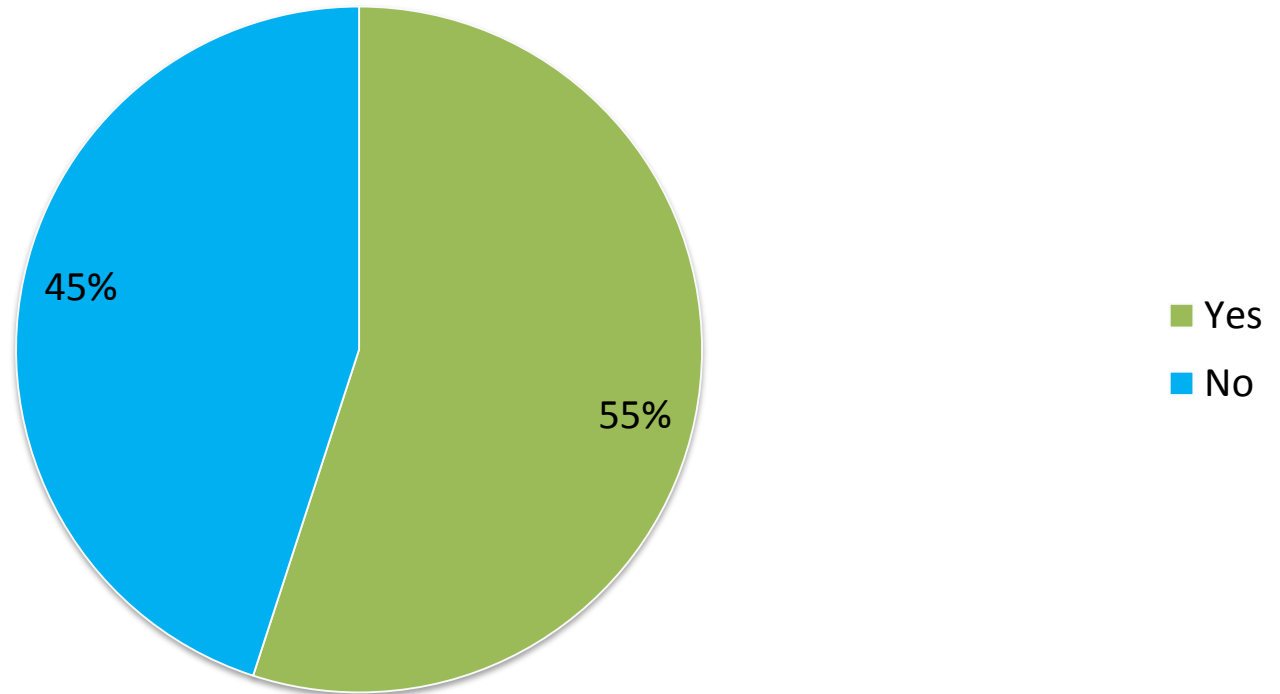
Show & Decision-Making



Once again, over 70% of the respondents noted that the Show did assist them in making better travel decisions. The only difference between 2016 and 2017 was that less people stated 'No' (-16%) when they were asked the question and more people were 'Unsure'.

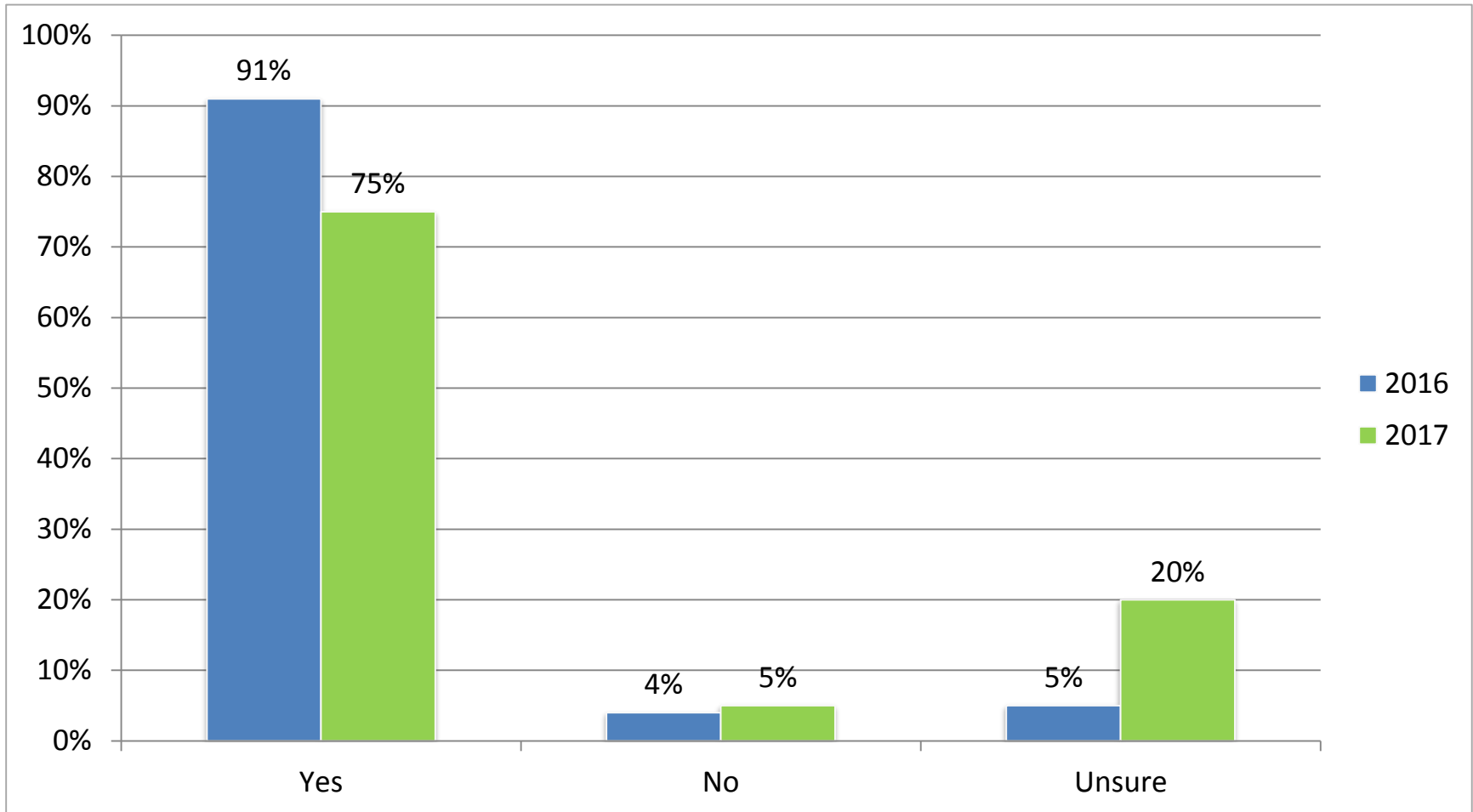
Previous Attendance

2017



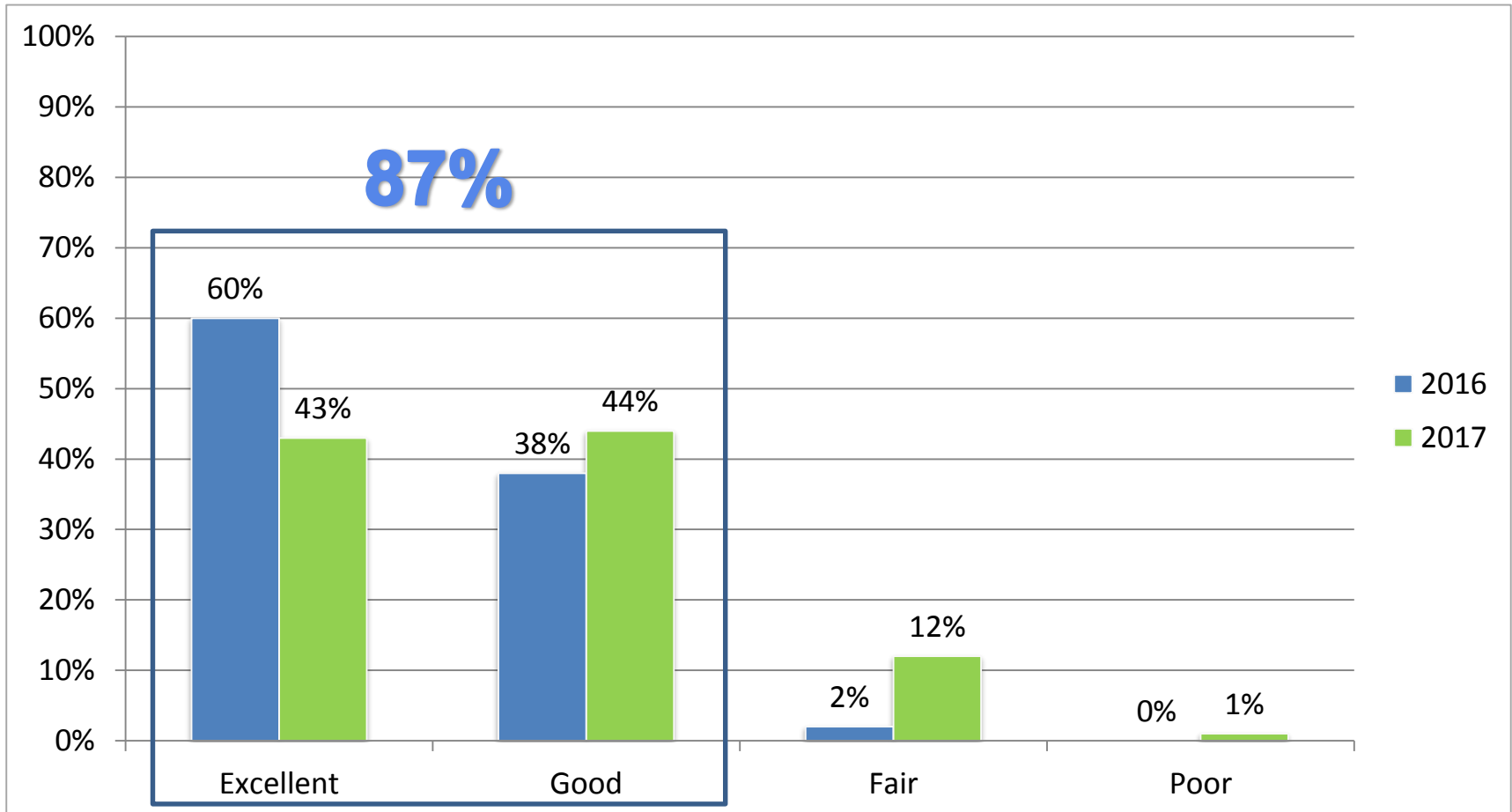
In 2017, 45% of the respondents had noted that they attended the show for the first time in 2017 while 55% had attended in 2016. This shows that the Show should continue to grow in terms of its overall attendance.

Future Attendance



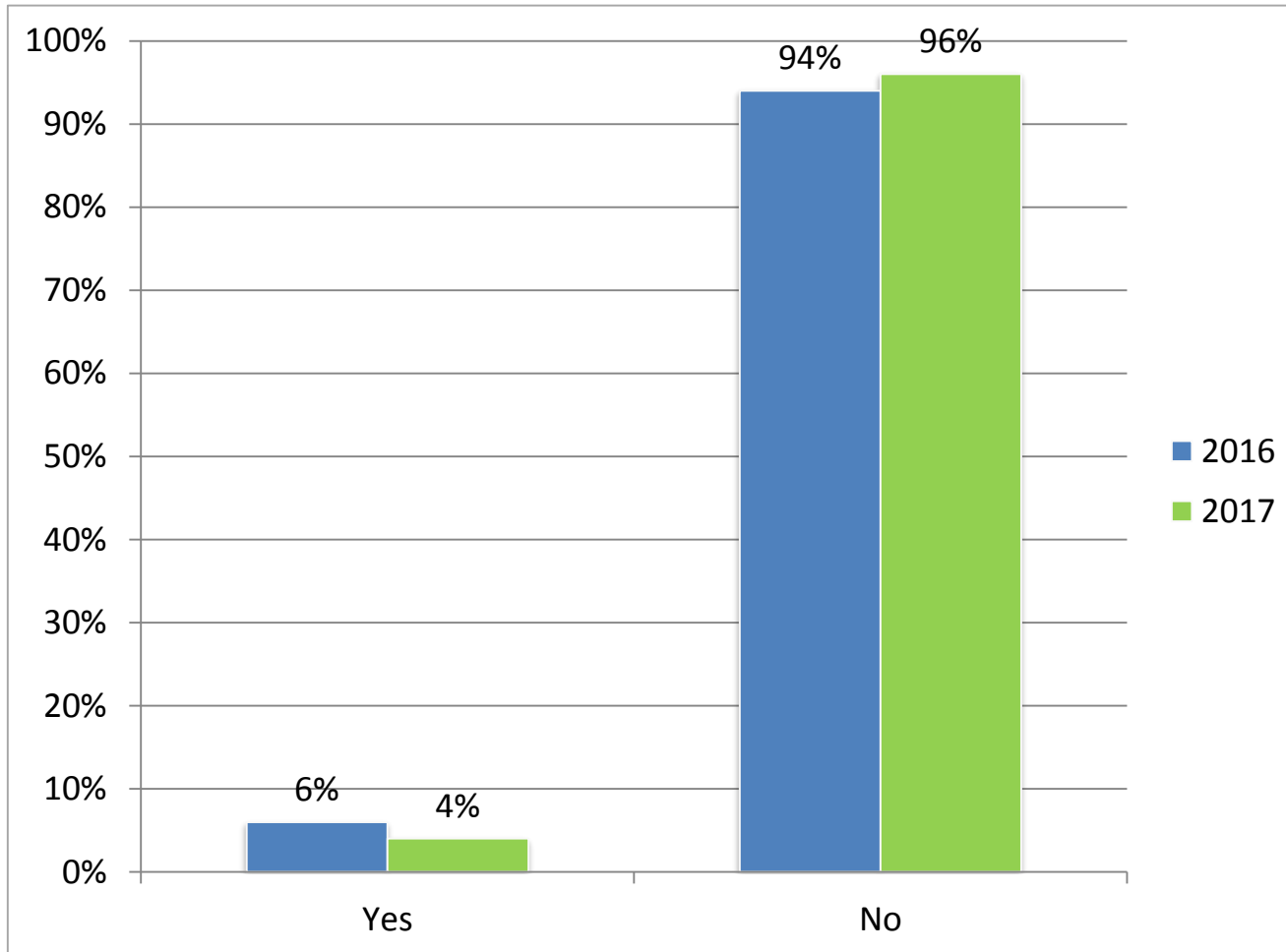
Most of the respondents indicated that they will attend the Show again in future. However, this proportion decreased from 91% in 2016 to 75% in 2017. This variance is also shown in the fact that 20% of the respondents were unsure if they would attend again, compared to the 5% in 2016.

Experience Rating



In 2017, most (87%) of the respondents had either an 'excellent' (43%) or 'good' (44%) experience at the event, with 12% having a 'fair' experience. Overall, there was an 11% decrease in those who had a 'excellent' (-17%) or 'good' (+6%) experience at the event. There was a 10% increase in those who had a 'fair' experience.

Problems Experienced



Some of the problems experienced were:

- Car park was very crowded, not enough parking
- Power cuts during the show
- The venue was too small, overcrowding (i.e. the event has potential to grow and improve)
- Tourism services were not up to standard

96% of the respondents indicated that they had NOT experienced any problems at the event. This is a further indication that the event was well organised. This proportion increased by 2% in 2017.

Marketing Suggestions



The **respondents** noted some of the following suggestions for improving the marketing of the Show in future:

- Increase the scope of marketing on the TV
- More, and better, adverts on billboards and posters (there were actually none of these in Durban or surrounding areas)
- Increase the presence on Social Media
- Increase the advertising in areas outside of Durban and KZN
- More digital media (e.g. websites, blogs etc.)

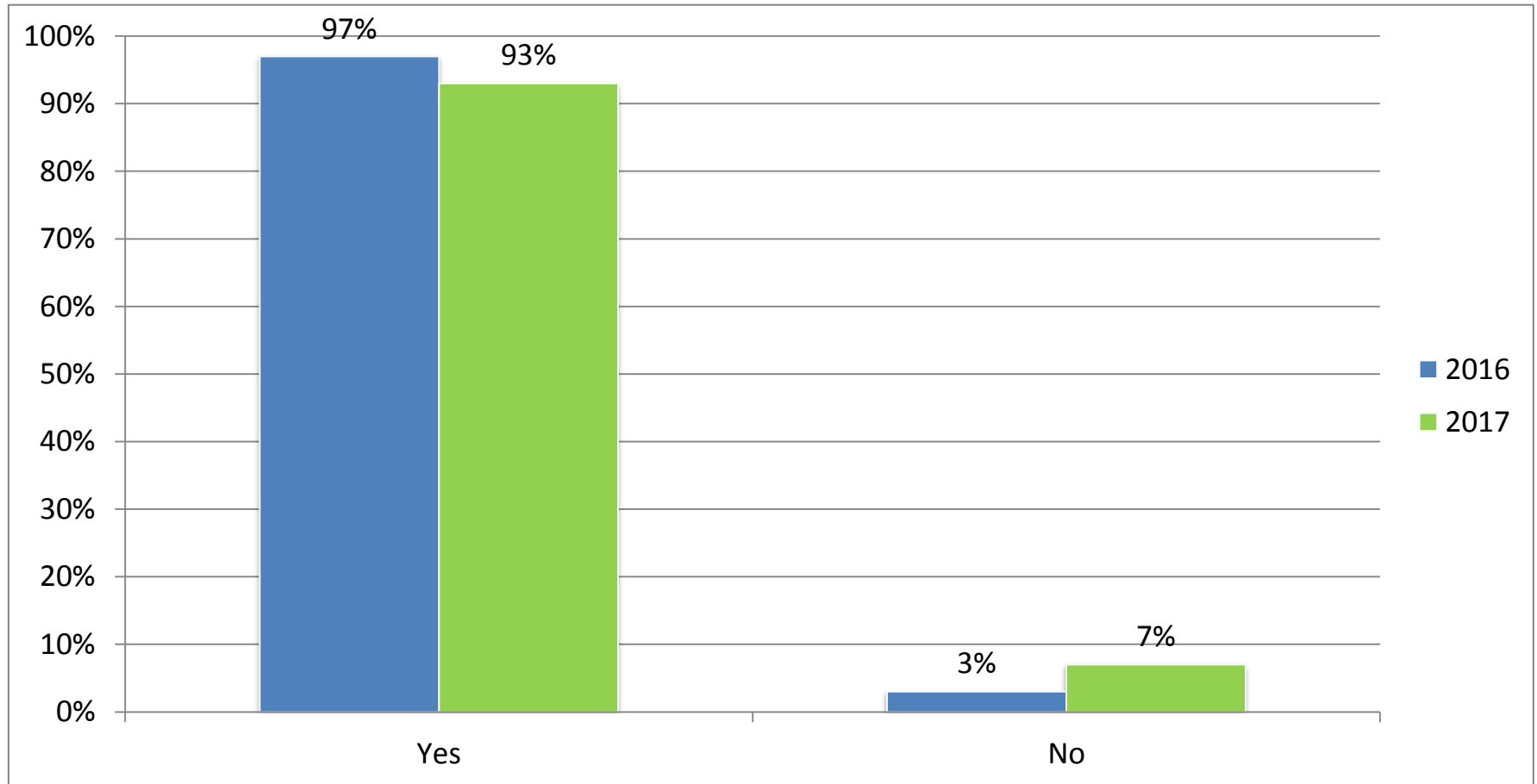
Event Improvement Suggestions



The **respondents** noted some of the following suggestions for improving the Show (in general) in future:

- Increase and improve the range of products and services on offer
- The T&A Show should run on its own (i.e. be its own show)
- More giveaways or “freebies”
- A bigger, more spacious venue is needed
- More entertainment (e.g. local musicians etc.)

Recommend the Event to Family & Friends?



Once again, over 90% of the respondents indicated that they would recommend the event to their friends and family. This shows that the public will contribute to the marketing of the event through 'Word-of-Mouth'.

Spend

LOCAL RESIDENTS (2017)	
Spend Category	Amount
Accommodation*	-
Transport (fuel, parking etc.)	R102
Food & Beverages	R256
Entertainment	R92
Purchases @ H&G Show	R1 700
Purchases @ T&A Show	R359
TOTAL AVERAGE SPEND	R2 493

*Not applicable for locals

H&G = House and Garden Show; **T&A** = Travel and Adventure Show

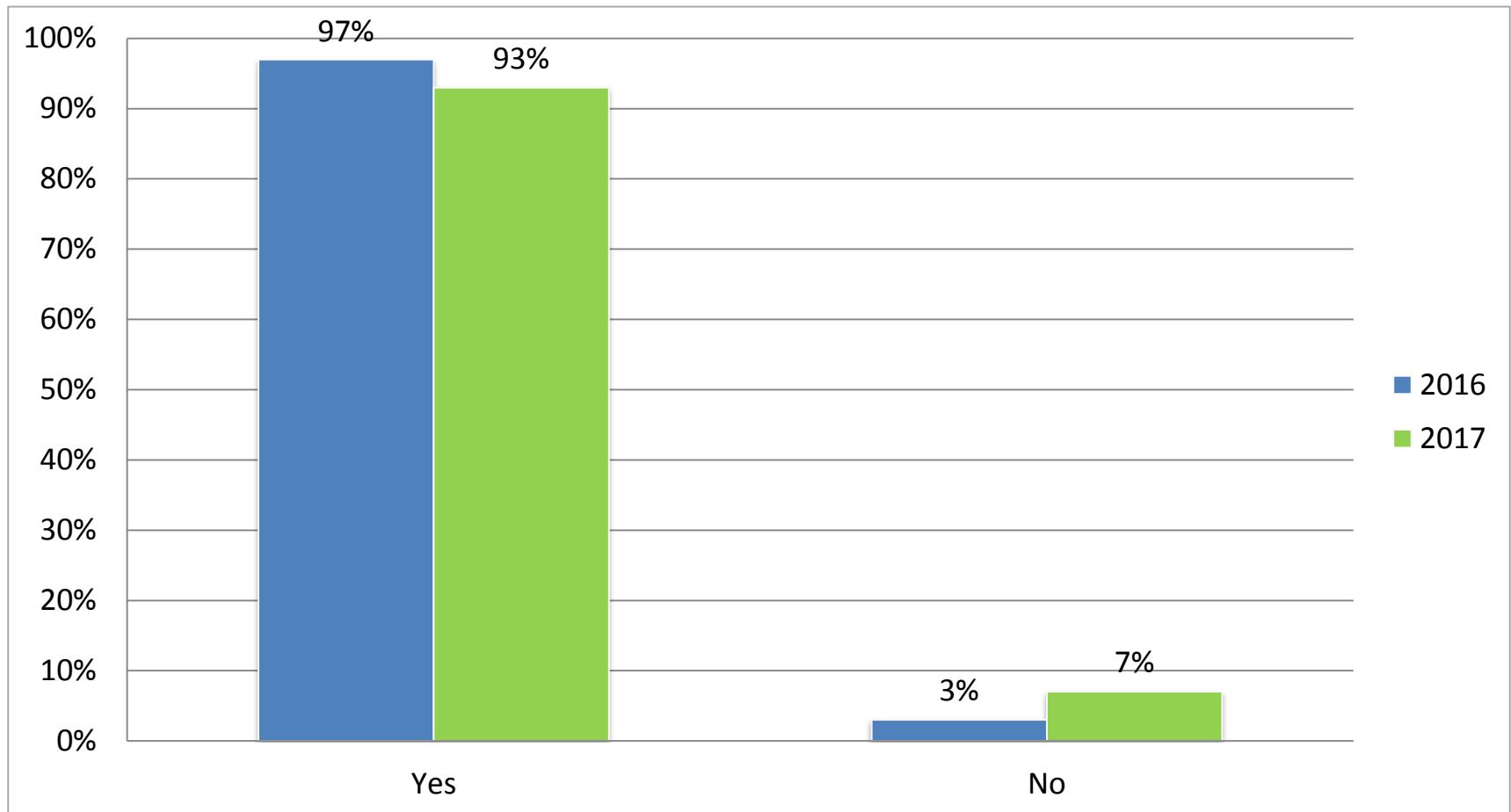
Spend (cont'd.)

VISITORS (2017)	
Spend Category	Amount
Accommodation*	R1 650
Transport (fuel, parking etc.)	R282
Food & Beverages	R423
Entertainment	R39
Purchases @ H&G Show	R2 232
Purchases @ T&A Show	R302
TOTAL AVERAGE SPEND	R3 320

*Overnight respondents ONLY (sample size was small)

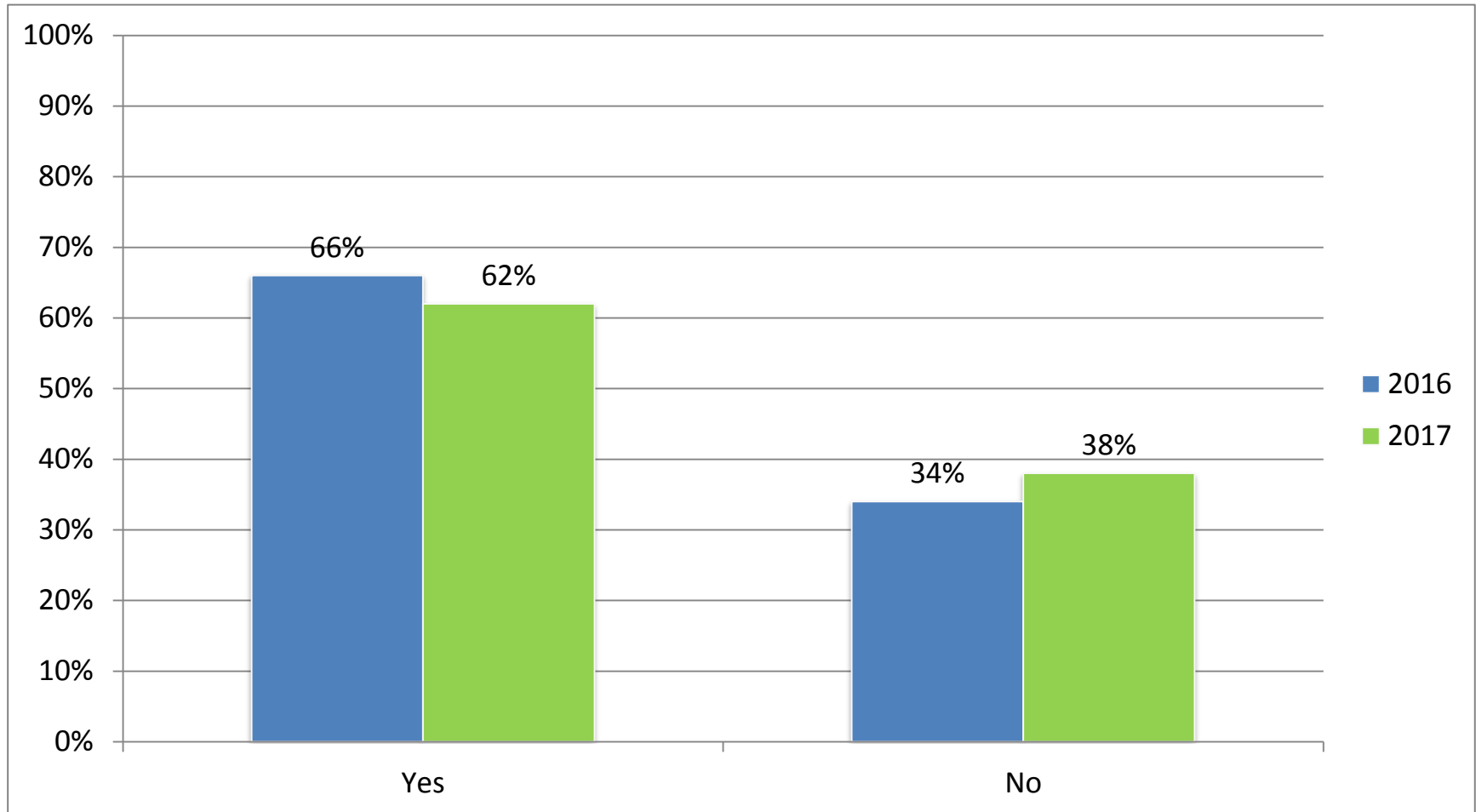
H&G = House and Garden Show; **T&A** = Travel and Adventure Show

Recommend KZN?



Again, over 90% of the respondents said that they would recommend KZN as a holiday destination to their friends and family. In 2017, however, there was a 4% decline in those who stated 'Yes'. This is no cause for concern though.

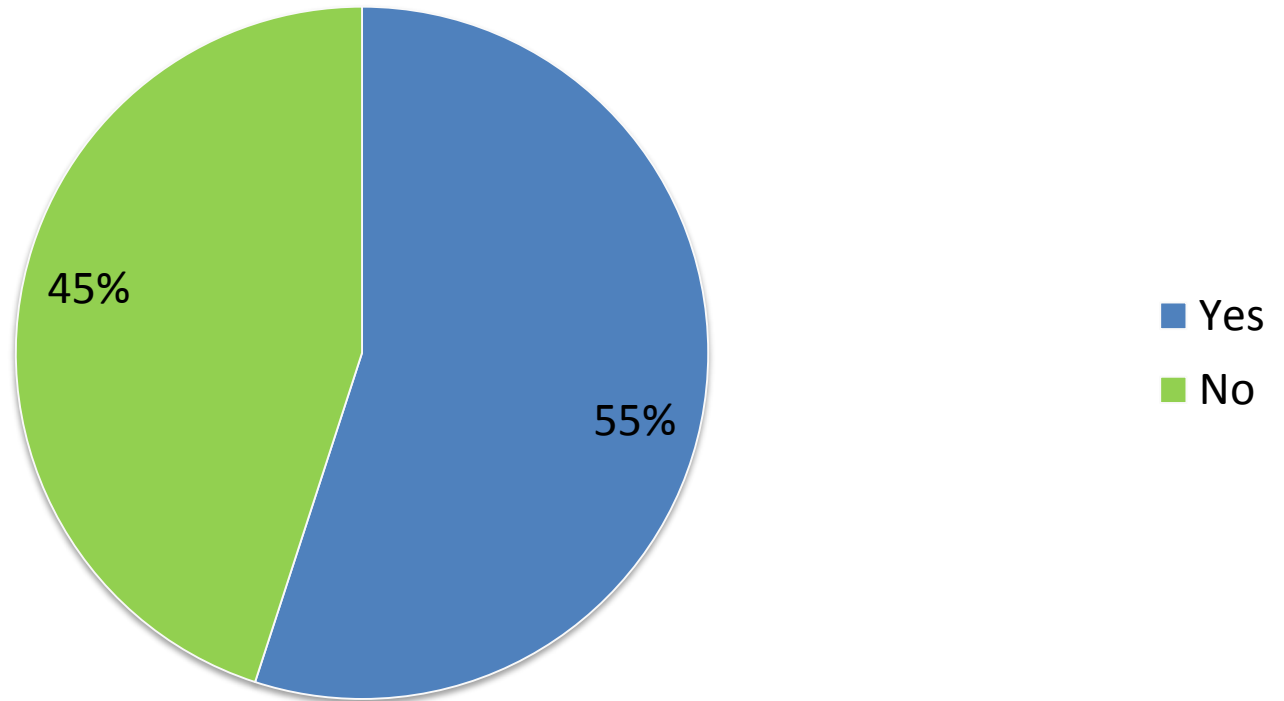
Holiday Plans in KZN



Although there was a decrease of 4% in 2017, the majority of the respondents (62%) stated that they do plan to travel to, or within, KZN for a holiday in the next 12 months.

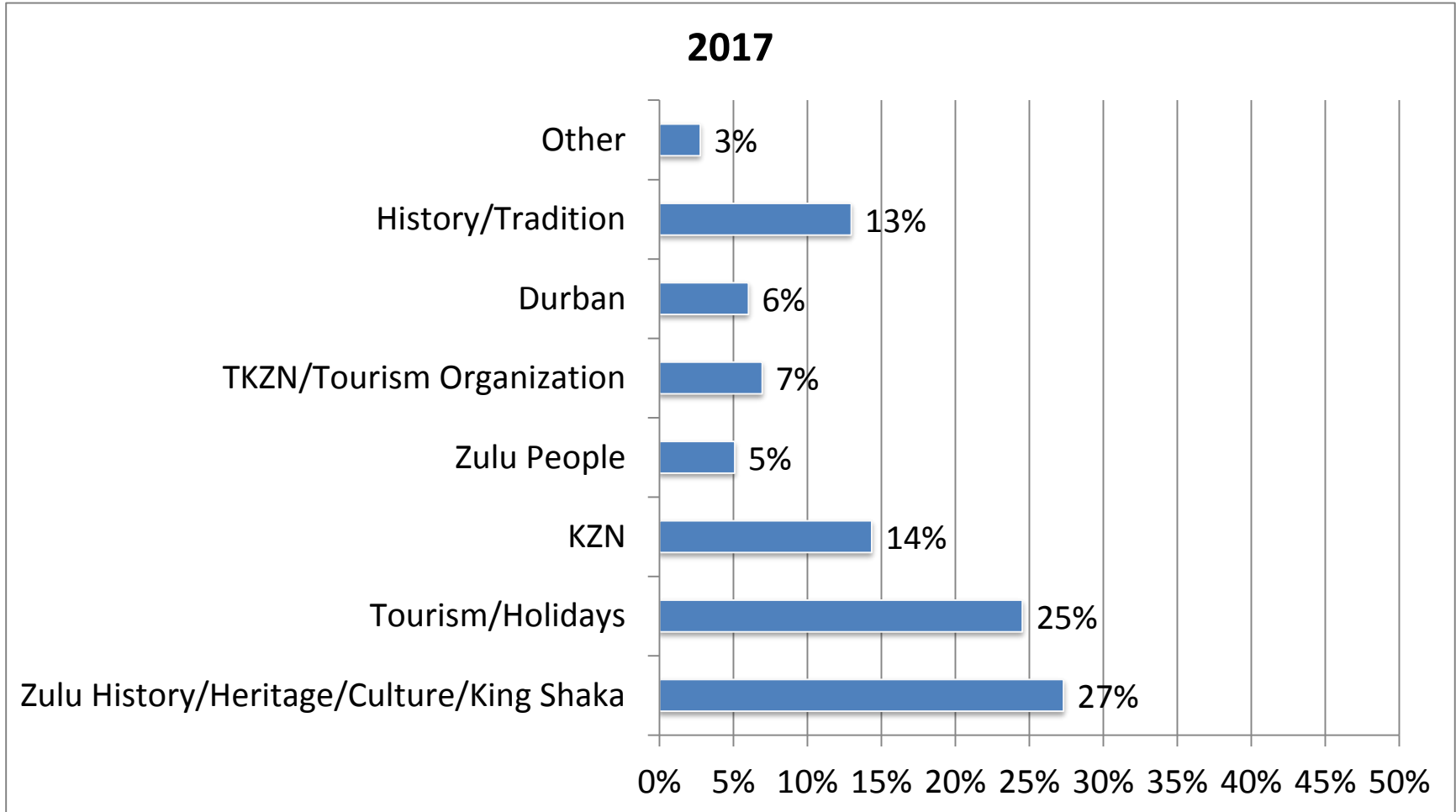
TKZN Slogan

2017



In 2017, 55% of the respondents were familiar with the TKZN slogan, “Zulu Kingdom. Exceptional.” This is a positive finding but there is room for improvement. No data was collected on this in 2016, hence there is no comparison.

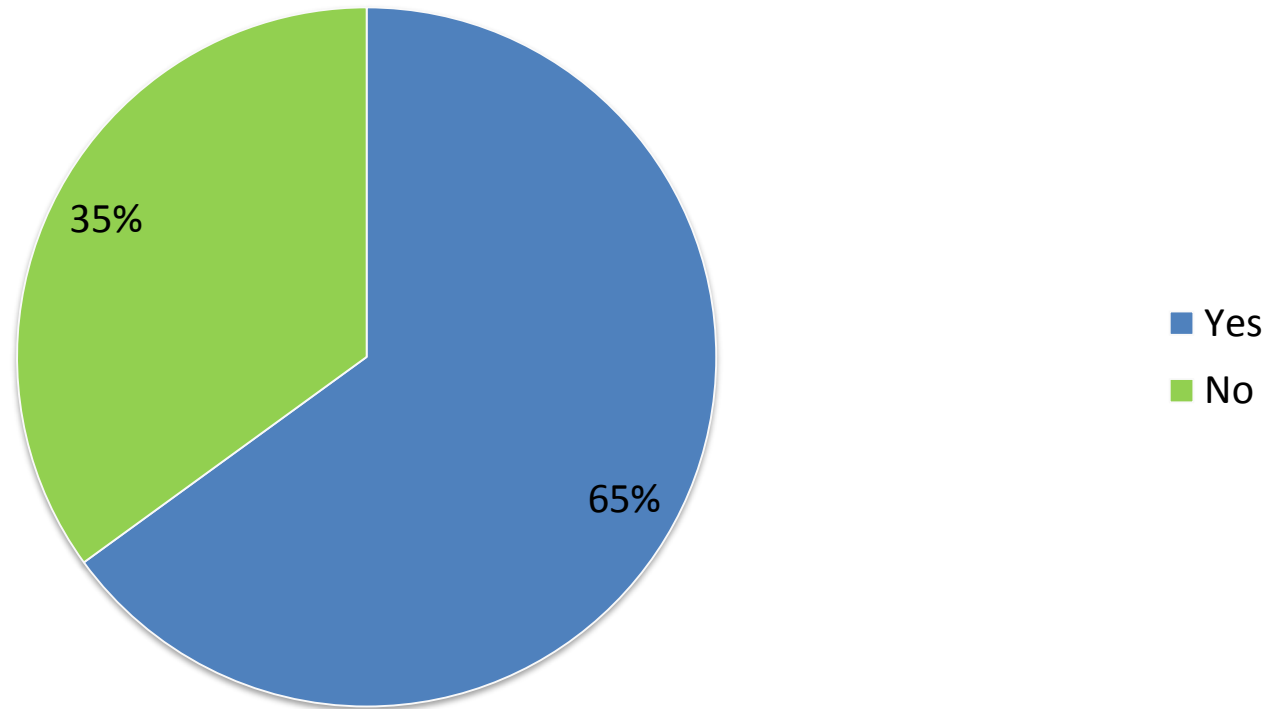
TKZN Slogan: Associations



The majority of the respondents associated the slogan with either 'Zulu History/Heritage/Culture/King Shaka' (27%) or with 'Tourism/Holidays' (25%). It is positive that there is a high number of associations with tourism and/or holidays.

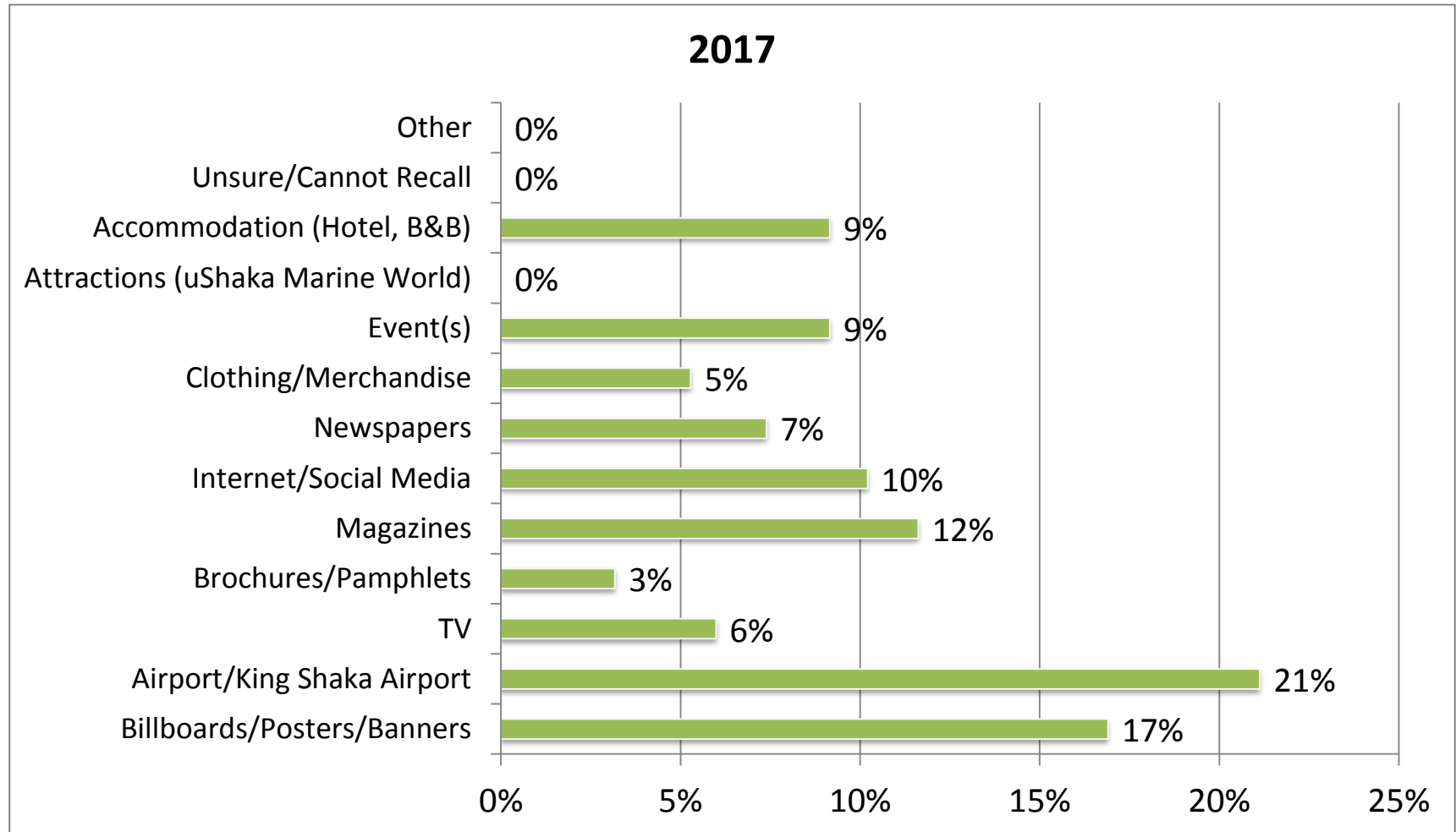
TKZN Logo

2017



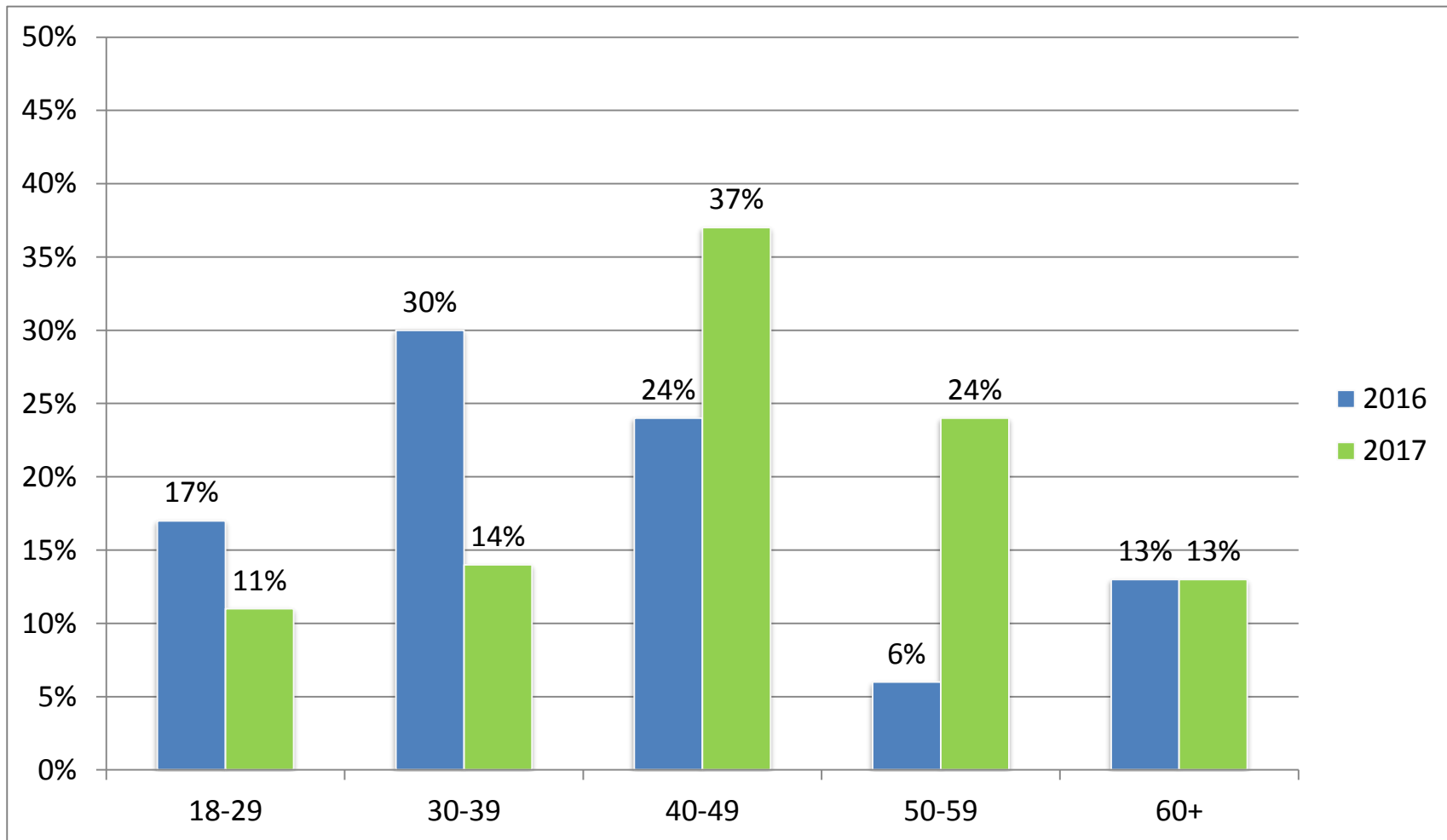
It was positive to note that 65% of the respondents had seen the TKZN logo before. This shows that there was a general awareness of TKZN's brand by the respondents at the Show. There was no data collected on this in 2016, hence there is no comparison.

TKZN Logo: Where seen?



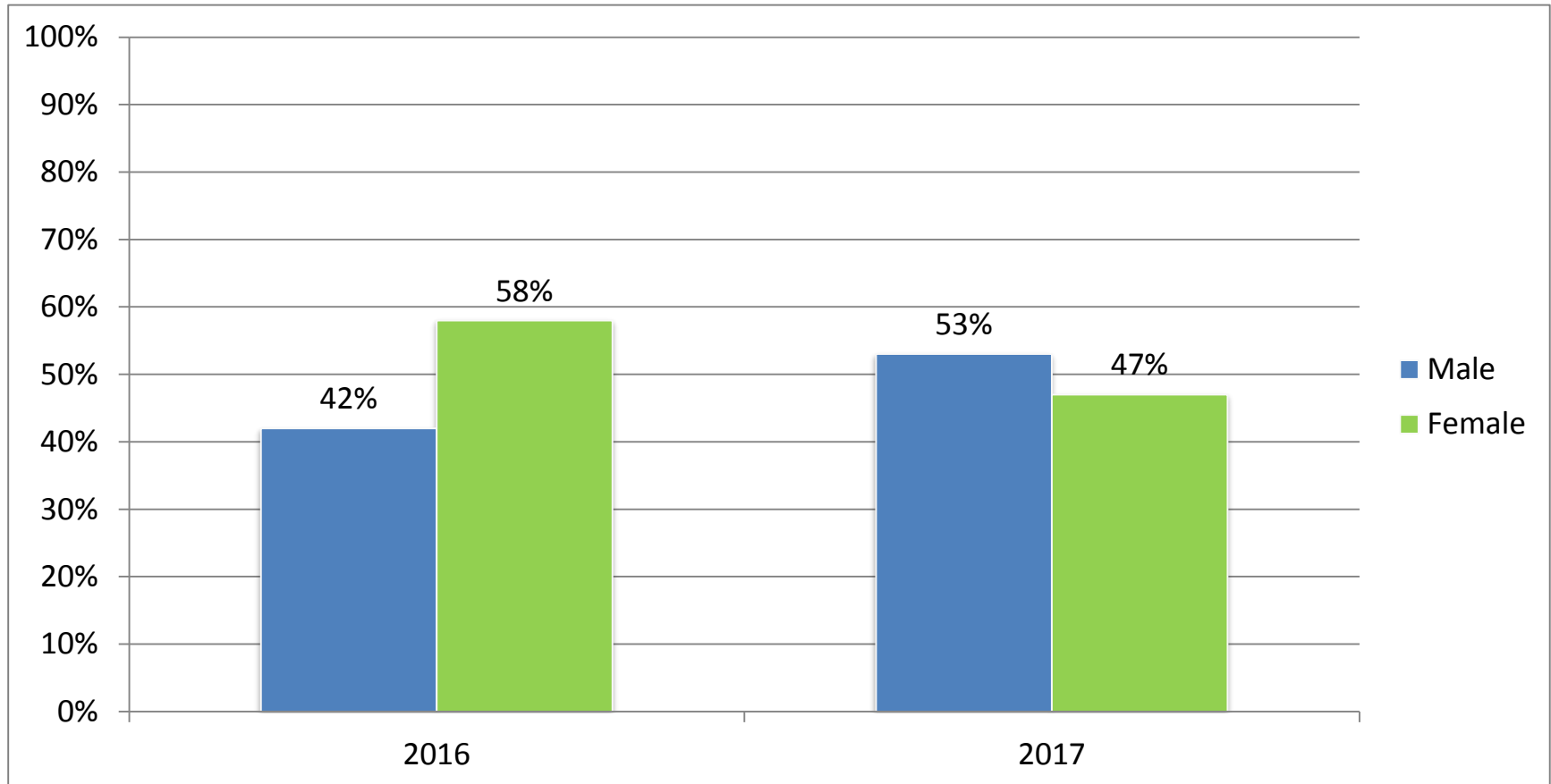
The majority of the respondents had seen the logo at the airport (King Shaka Airport) (21%), on billboards/posters/banners (17%), in magazines (12%), or on the internet/social media (10%).

Demographics: Age



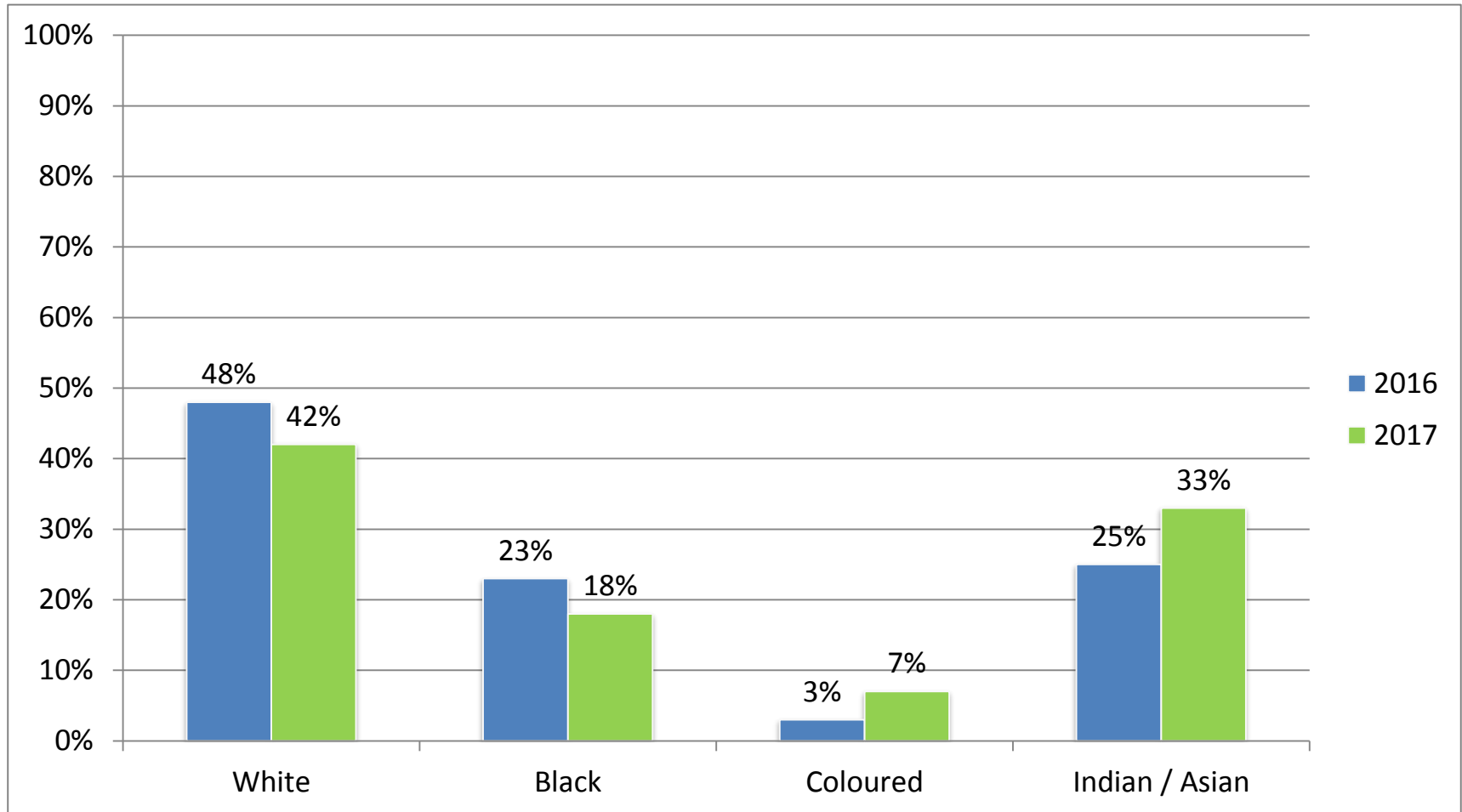
In 2017, the majority of the respondents were over the age of 40 (75%), with most being between the ages of 40-49 (37%) and 50-59 (24%). There was an increase of 18% in the number of respondents between the ages of 50-59 in 2017.

Demographics: Gender



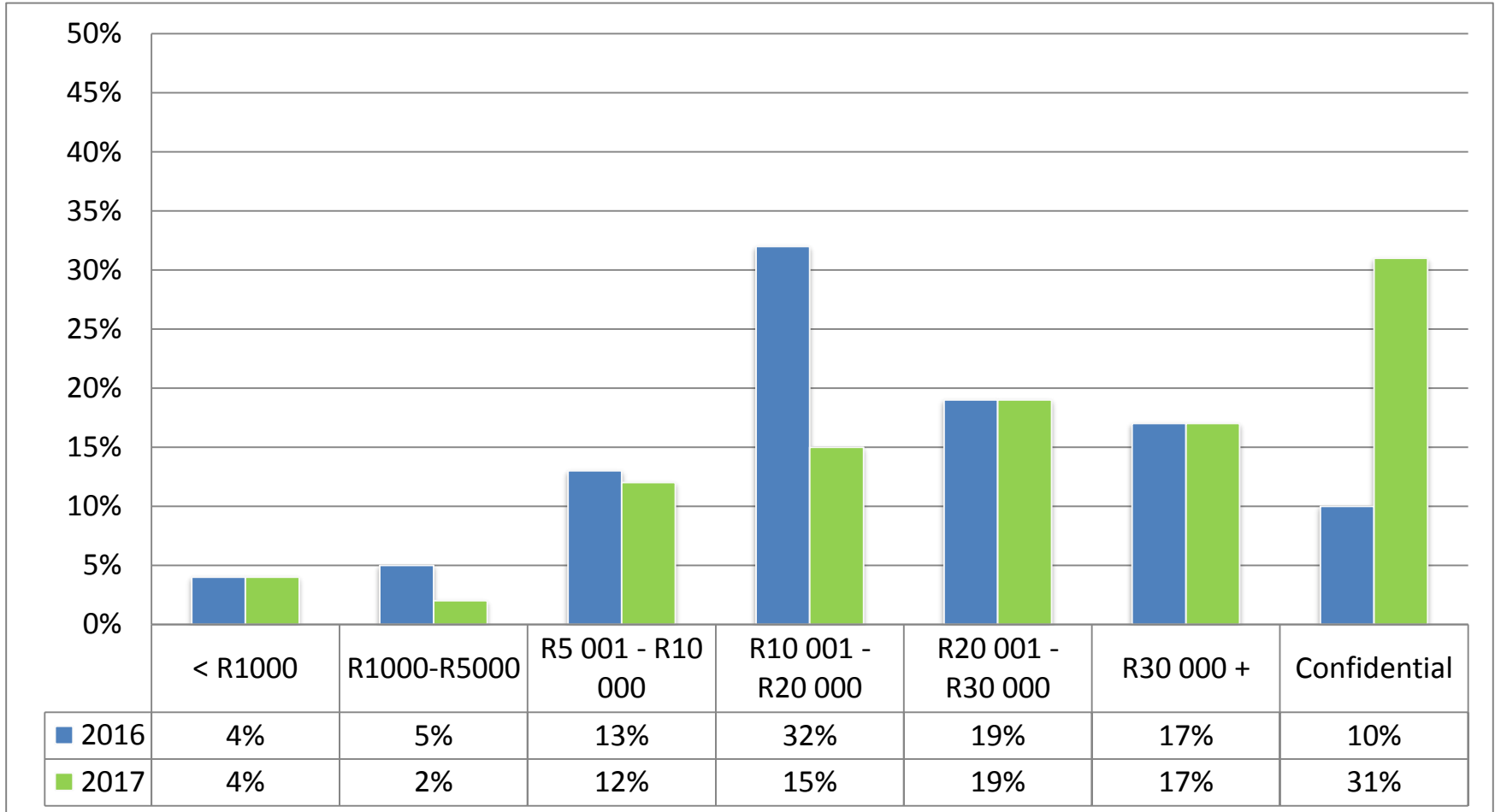
In 2017, the majority of the respondents were male (53%), while in 2016 the majority of the respondents were female (58%). The split between male and female is more closely divided in 2017, when compared to 2016. It is difficult to ascertain exactly why there was a change in the male/female between the two years. It is possible that the survey methods could have had an influence on this, but this cannot be confirmed completely.

Demographics: Population Group



Once again, the majority of the respondents (75%) were either 'White' (42%) or 'Indian/Asian' (33%). In 2017, there was a 6% decrease in the number of 'White' respondents, while there was an 8% increase in the number of 'Indian/Asian' respondents.

Demographics: Income Groups



In 2017, there was a 21% increase in the number of respondents who preferred to keep their monthly income 'Confidential' which has obviously had an impact on the findings. There were no other significant changes – the majority of the respondents still earn R10 000 or more on a monthly basis (51%).

Findings



1. It was noted that 73% of the respondents were local residents to Durban, 23% were 'day visitors' and only 4% were 'overnight visitors'. There was an increase (+8%) in the number of day visitors at the event in 2017. This isn't entirely negative as the Show has the potential of increasing intra-provincial travel amongst these local Durban residents.
2. As expected, 94% of the respondents were from KZN, while 3% were from the Gauteng and 2% were from the Western Cape. The numbers from KZN increased from 76% in 2016 to 94% in 2017.
3. The average length of stay, in 2017, was estimated to be 3.1 nights with the majority staying for 2 nights (22%) or 4 nights (33%). Although the sample size of overnight visitors was considered to be small, results were still drawn to form comparisons.
4. It was estimated that 98% of the respondents were in the area of the event for the primary purpose of attending the House & Garden Show (57%) or the Travel & Adventure Show (41%).

Findings



5. Most of the respondents were influenced, to attend the Show, from attending it before (25%), through 'Word-of-Mouth' (38%), or from adverts on the radio (15%) (most likely East Coast Radio). In 2017, there was a 21% increase in the number of who were influenced by their previous attendance, and a 16% increase in those who were influenced by 'Word-of-Mouth'.
6. In 2017, 85% of the respondents found the T&A Show to be useful. This number had decreased by 9% when compared with 2016. Some of the respondents found the show to be useful due to some of the following:
 - Range of products
 - New experiences
 - Ideas for holidays
7. In 2017 (only), the majority of the respondents were looking for information (45%), while 14% were looking for goods and 9% were looking for services. 32% of the respondents were looking for a combination of all of these.

Findings



8. Some of the respondents noted that they were looking for information on: “accommodation”, “attractions”, “holiday packages”, as well as other types of travel-related information.
9. The majority of the respondents (75%) had noted that the Show has helped them to make better travel decisions in the future. There was an increase of 19% in the number of respondents who were unsure if it would allow them to make better travel decisions.
10. As the Show was only held for the first time in 2016, it was only noted in 2017 that 45% had attended the Show for the first time this year. That means that 55% of the respondents had been in 2016.
11. It was noted that 75% of the respondents plan to attend the Show again in future. This was, however, a 16% decrease when compared to 2016.

Findings



12. It was positive to see that 87% of the respondents had either a 'good' (44%) or 'excellent' (43%) experience at the event in 2017. There was, however, a 10% increase in the number who had a 'fair' experience at the event
13. On another positive note, 96% of the respondents did NOT experience any problems at the event in 2017. Some of the problems that were experienced were as follows:
 - Car park was crowded
 - Power cuts
 - Venue of T&A was small
14. The respondents also suggested a few aspects in terms of improving the marketing of the event. One such example was to increase the number of adverts outside of Durban, as well as KZN.
15. The respondents also suggested a few aspects in terms of improving the event in general. One such suggestion was to allow the Show to stand-alone from the H&G Show in future.

Findings



16. It was positive to note that 93% of the respondents said that they would recommend the event to their family and friends.
17. In terms of the spend in 2017, it was noted that both the local residents and the visitors said that they spent more on goods/services at the H&G Show rather than at the T&A Show (a difference of about R700 and more).
18. In terms of recommending KZN as a holiday destination, 93% of the respondents said that they would do so to their family and friends.
19. In addition to this, 62% of the respondents have plans to travel to (inter-provincial) or within (intra-provincial) KZN in the next 12 months for a holiday.
20. In 2017, 55% of the respondents were familiar with the TKZN slogan. It was positive to see that the second highest association thereof was 'Tourism/Holidays' (25%).

Findings



21. In 2017, 65% had stated that they had seen the TKZN logo before. With most seeing it at the airport (21%), on billboards/posters/banners (17%), or in magazines (12%).

22. In terms of the demographics in 2017, the following was revealed:

- 75% of the respondents were over the age of 40.
- 53% of the respondents were male, while 47% were female.
- The majority of the respondents were 'White' (42%) or Indian/Asian (33%).
- Over 50% of the respondents earn more than R10 000 per month.

Recommendations



The following **general recommendations** are noted:

1. It is recommended that marketing of the event be improved in future years, and that a new scope or methods for the marketing is implemented. In other words, it is recommended that the areas in which the event is marketed is expanded to outside of the city of Durban, as well as the province. In addition to this, the types of marketing should also vary – i.e. social media, posters on light poles, radio and TV adverts, as well as newspaper and magazine spreads. This is, however, dependant on budget but some of these can be achieved (especially social media) with limited budget (see recommendations for TKZN also). In 2017, there were no posters advertising the Show as there were in 2016 and this was a major omission.
2. In addressing some of the recommendations by respondents, it is recommended that the event is held in a larger venue which would thus allow an increased amount of products/services to be offered by different exhibitors. The venue should also allow more space for passage and should cater for various weather conditions (i.e. shelter for rain, or air conditioners / ventilation for warm days).

Recommendations



3. Serious considerations should be made in terms of the feasibility of running the show as a stand-alone event (i.e. separate to the H&G Show). The event has the potential to run as its own event but it is recommended that it is built up first, and proper marketing strategies are drawn, before removing it from the H&G Show. This could take a few years, but the future of the T&A Show is as a stand-alone event such as The Getaway Show (in JHB). It is also recommended that more sponsors are brought on board in the short-term so that they can be aware of the potential and thus nurture the show into its own brand.
4. In addition to the above, the T&A Show should also work towards becoming almost separate from the H&G Show already. Some of the ways in which this could be achieved include more giveaways entirely for T&A Show guests, its own PA system with tourism-specific announcements, a mapped out layout of the show combined with signage for the exhibits, and more eye-catching aspects that delay the consumers from rushing out of the hall just so that they can get to the H&G Show.

Recommendations



5. It is highly recommended that back-up generators are used in future so that any potential power cuts do not have as much of an impact as they did this year.
6. In order to improve the general vibe around the Show, it is recommended that more on-site “tastes” of adventure activities are introduced. For example, a climbing wall, a test tank for snorkelling gear, a zip line (e.g. Karkloof Canopy Tour), amongst other ideas could be introduced. This will help to draw people towards the Show and also get them talking (i.e. word-of-mouth). Some other examples also include a wave pool for surfing, or a skate park.
7. Another option for the “tastes” is to set up a photo booth type setup whereby people have their photos taken “doing” adventure activities in the province. This could either be done by using a glass screen with images on and people stand behind it – e.g. a underwater scene where people put on scuba gear and have their photo taken.

Recommendations



8. A further option to increase the actual “experience” at the Show is to introduce a range of demonstrations that are based on adventure activities. For example, there could be someone demonstrating on how to set up a hiking pack with all the “bits and bobs” such as sleeping bags and survival basics (e.g. fire starting). Another example would be to have someone demonstrating how to prepare for a scuba dive and all the important hand signals. Competitions and audience involvement should also be implemented and encouraged.

Recommendations



The following recommendations are aimed at **TKZN**:

1. A separate document shall be drawn up which will address some of the issues with the T&A Show from the perspective of TKZN.
2. The marketing and promotion of the Show should be included in activities such as Winter Campaigns, and other promotional related tasks that are performed by TKZN's marketing team.
3. A few minor "touch ups" are needed for the attendee survey which will allow the results to be just a bit more accurate. The training that the fieldworkers receive will also be relevant in this regards. The reason for this is because there needs to be absolute clarity regarding some of the questions (e.g. "What goods did you purchase at the Show" → change to "What goods did you purchase at the T&A Show only"). As is evident, the minor changes could have much stronger effects on the outcome of the findings.