



MINI VISITOR SATISFACTION SURVEY

SUMMER 2018

Background:

A Mini Visitor Satisfaction Survey was conducted during Summer Season from 15 December to 8 January 2018 through the Visitor Information Centres (VICs). VICs were briefed and 50-100 printed surveys handed out for completion to each office. A travel prize was organised with Blue Marlin to incentivise visitor participation. At the same time, we also asked visitors if they wanted to receive our quarterly consumer newsletters, so we could build our database.

Objective:

The objective of the Visitor Satisfaction Survey was to determine how satisfied visitors were with the destination and/or tourism aspects thereof during the Summer 2018 season. In addition, we also needed to learn more about our visitors, as well as their information gathering, booking and travelling behaviour.

Response:

We were satisfied with only 3 of the VICs' participation: Hibberdene, Scottburgh and Shelly Centre, see below:

Visitor Information Centre:	Number of Surveys Completed:
Scottburgh	47
Hibberdene	47
Shelly Centre	70
Mattison Square	20
Margate	10
Ramsgate	15
MacBanana	5
TOTAL:	214

Port Shepstone and Southbroom were not handed surveys due to two consecutive maternity leaves in Port Shepstone and the Southbroom officer having moved to the new Mattison Square office. Mattison Square being new, we did not expect as many from that office. We were very disappointed by the lack of participation from busy offices such as Margate, 10 only, and MacBanana, 5 only, both offices had ample opportunity to gather important survey data from a very busy season, especially in their VICs. Both of those offices

have supervisors and interns and had the same circumstances as the other offices, if not better due to their busy centres. Were there a handful surveys less, the value of the survey results would have been jeopardised, at the same time, we could have had at least a 100 more surveys done, had no one dropped the ball. See also point 11, showing skewed results that we cannot use, due to lack of equal participation by offices, including Port Shepstone.

Results:

PERSONAL:

1. Do you live in South Africa?

YES: **204** PROVINCE: EC **4** FS **9** GT **102** KZ **33** LP **8** MP **14** NC **2** NW **10** WC **1**

NO: **10** COUNTRY: Switzerland (1); Botswana (2); Sweden (1); England (2); Australia (1); Poland (1); Germany (2)

The KZN South Coast is a popular domestic holiday destination, which also attracts international visitors from various countries, including some countries that are not on everyone else’s radar, such as from Scandinavia [historical links to the area] and, as this survey revealed, even Poland. You only have to drive around to see the high number of GP number plates in season, the province that supplied half of the respondents to our survey.

Domestic 95% International 5%

Domestic home province	International country of origin
Gauteng 50%	Botswana
KwaZulu-Natal 16%	England
Mpumalanga 7%	Germany
Northwest 5%	Switzerland
Free State 4%	Sweden
Limpopo 4%	Australia
Eastern Cape 2%	Poland
Northern Cape 1%	
Western Cape 0.5%	

2. Is this your first time on the South Coast?

YES: **31** NO: **183** How many times have you been here before: grew up here (2); many times (21); full time (local [but travelling within region]); every summer/holiday/year (3); 1333 yrs on 125 entries (average: more than 10 times)

The KZN South Coast can really be proud of the incredibly high number of repeat visitors. The challenge will be to keep them and not rest on our laurels, as this does buck the global travel trend of continuously visiting new destinations, with global travel trends eventually landing here. It also shows that we need to grow the first-time visitors, in all age groups, family setups and demographics, so that we create more legacy visitors, a very important

factor in continuing the repeat visitor cycle, as can be seen later on in the survey. The number of years repeat visitors have been coming to the KZN South Coast are also very high and show that there are families who are here on their second visit all the way through to those who have been coming for decades and decades (20, 30, 40, 50 years etc.), on average these visitors have been coming here for more than 10 years.

Repeat visitor 86% (on average more than 10 years)
First-time visitor 14%

3. Are you travelling by yourself?

YES: **13** NO: **199** We are travelling as a Family: **177** OR as Friends: **6** (Family & Friends: **5**) OR as a Group (other): **2** # Adults incl. yourself: 1 adult (3); **2 adults (64)**; 3 (12); 4 (15); 5 (17); 6 (6); 8 (2); 16 (1); 20 (1); 22 (1) # Children: **0 children (38)**; 1 (20); 2 (27); 3 (17); 4 (5); 5 (1); 6 (1); 8 (1); 10 (1)

The preferred way to travel is in a group and that is because we attract a vast majority of families. A number of respondents did not want to reveal numbers of children and/or the forms were not filled out completely/correctly by the VIC staff, but of the ones who did record the number of children, the majority of family groups travelled without children, followed by 2, 1 and 3 children. Demographics such as the age and married status of the respondents would indicate the reason for this, e.g. senior/young/childless couple or siblings. A single adult travelling with children seem to be the least occurring family group.

Group travel 94%
Single travel 6%

Family 93%
Friends 3%
Family & Friends 3%
Other 1%

Adults	Children
2 adults 52%	0 children 34%
5 adults 14%	2 children 24%
4 adults 12%	1 child 18%
3 adults 10%	3 children 15%
6 adults 5%	4 children 5%
8, 16, 20, 22 adults 4%	5, 6, 8, 10 children 4%
1 adult 2%	

4. Did you fly here, drive by car, motorbike or arrive by bus?

FLY: **14 (Fly & Car: 3)** KING SHAKA: **10** MARGATE: **0** RATE M. AIRPORT: **N/A** CAR: **184**
MOTORBIKE: **0** BUS: **9** OTHER: **N/A**

Due to easy access from our core domestic markets, as can be seen in other points, the preferred method for arrival is self-drive. Only King Shaka International Airport was used by the respondents who arrived by flight. There could be more car hire, as it wasn't specifically asked and the question asks about arrival, which means you can only arrive in one mode, so car, in general, would not be ticked at the same time.

<p>Car 89% Fly 5% (King Shaka International Airport) Bus 4% Fly & Car 1%</p>
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DESTINATION:

5. How would you rate the South Coast as a destination?

1 (least): 1 2: 4 3: 24 4: 107 5 (most): 74 Reason:

Just one digit out of sequence and to work on! The majority of visitors surveyed (86%) would rate the KZN South Coast a top-notch destination. The positives and negatives given as reasons for ratings give invaluable insight and can help push it to a 5.

<p>4 rating 51% 5 rating 35% 3 rating 11% 2 rating 2% 1 rating 0.5%</p>
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Negatives	Positives
<p>Dirty beach with litter, Port Shepstone beaches not clean, only clean sometimes, could be cleaner, not clean by river, some places at beach dirty (7) More attractions, not enough activity on beach (5) Degraded, run down, general upkeep to improve (3) Crime and security (2) Drinking on St Mikes beach, more crowd control (2) Crowds (1) Some places lack services (1) More information re. activities (1)</p>	<p>Very nice, good, lovely, love it, great, fascinating holiday destination, enjoyable (29) Beautiful, nature, environment, forests (14) Quiet, peaceful, relaxing (12) Enjoyable, lots of fun, exciting things to do & visit (10) Welcoming, friendly locals, nice people, helpful (9) Clean (9) Weather (8) Beaches (8) Blue Flag beaches (1) Safe & secure (8) Always come, always good (2) Laid-back, atmosphere (2) Warm ocean (1) Food nearby (1) Lots of shops (1)</p>

	Hot girls (1)
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6. How would you rate our beaches?

1 (least): **4** 2: **4** 3: **34** 4: **88** 5 (most): **79** Reason:

Exactly the same as the destination in terms of ratings, with **80%** of visitors giving top ratings. The reasons, however, relate to beaches only, and, again, can provide insight into how to get our beaches rated 5-star.

4 rating 42% 5 rating 38% 3 rating 16% 2 rating 2% 1 rating 2%

Negatives	Positives
Could be cleaner, cleanliness, sewage on beaches need cleaning, rubbish, dirty, litter on 26 th , lots of rubbish (18) Crowded, crowds (4) Ablution facilities & change rooms needed, Margate beach toilets, Wild Coast Sun toilets, no facilities (4) Alcohol (2) General upkeep to improve, run down (2) Need more swimming beaches (2) Deep for children (1) Crowd control (1) Safety (1) Inconsistent (1) Changes (1) Wood on the beach, couldn't swim (1)	Clean, neat (34) Beautiful, good, best, big, scenic, excellent, pleasant, lovely (25) Safe, security (14) Warm ocean (6) Friendly, welcoming people (4) Quiet (4) Fun, enjoyable (3) Swimming (3) Maintenance, services, well kept (3) Blue Flag (2) Waves (2) Child-friendly (1) Chilled vibes (1) Lifesavers (1) Sunrises (1) Many (1) No wind (1) <i>"PE beaches are cold"; "will not go to Durban next time"</i>

7. Is there any business/service that you were looking for that you didn't find on your trip?

YES: **21** NO: **176**

The overwhelming majority didn't have any of their business/service needs unmet, however, what they didn't find may provide ideas worth investigating, from an informational, business or services point of view.

No 89%

Yes 11%

Visitors didn't find the following:

- South Coast Mall
- Cleaning services
- Place to dance ballroom
 - Cheap food
- WiFi hotspots on beach
 - Roman's Pizza
- ATMs, incl. at beach
 - Butchery
 - Chemist
 - Pool
- Ice cream on beach
- Restaurant closed early
 - Not enough toilets
 - Movies
- Brand shops e.g. Cotton On
 - Waterproof
 - Mountain bike
- No fresh fishmongers
- Virgin Active gym
 - Restaurants
 - Banana Beach
 - Red Desert
 - Fun

8. Will you recommend the South Coast to your friends or family?

YES: **211** Reason: see table below.

NO: **2** Reason: *"I would direct to North Coast" [general upkeep]; "Rubbish everywhere on beaches" [Rates destination 5 for nature, but 1 for beaches]*

This is a highly positive and important indicator, based on the fact that visitors regard Word-of-Mouth as a major decider when choosing a destination.

Will recommend 99%

Won't recommend 1%

Recommend (positives):

Excellent holiday destination, very nice, love it, amazing destination, awesome (35)
Enjoyable, fun, boat trips, lots to do, had a great time, many activities, lots of cool things to see and do (18)

Nature, good environment, lovely, very beautiful, views (16)
 Quiet, peaceful beaches, no disturbances & hawkers, relaxing, great to distress (14)
 Welcoming destination; good, friendly people & locals; great hospitality, polite, helpful (14)
 Great weather; nice warm weather (13)
 Good, lovely beaches, not far from beaches (8)
 Safe, no crime (6)
 Clean (6)
 Child-friendly, family-friendly, fun for children, kids love it, family destination (6)
 Free accomm, cheap, cost-effective, not as expensive (4)
 Sea is awesome, good & warm water (3)
 Nice restaurants, Hibberdene restaurants & businesses (2)
 Well run, well maintained (2)
 Great atmosphere, lovely vibe (2)
 Not too far from Joburg/Gauteng (2)

“Recommend to some”; “Better than the North Coast”; “Oribi Gorge”; “Good beaches at Hibberdene”; “As long as cleanliness on beaches can be maintained”; “Definitely not as commercialised as North Coast”; “Seems to be returning to previous standards”; “Trafalgar & Ramsgate is good, better than Port Shepstone”; “Definitely”; “Always”

9. Where will you share your photos, videos & comments of your trip?

Facebook **112** Instagram **50** WhatsApp **40** Family, colleagues, frames (offline) **9** Twitter **2**

Facebook is, as expected the favoured tool & social media channel for sharing, with more than half the mentions. Visual Instagram and popular WhatsApp are the other 2 favourites. Some people are detoxing from technology on holiday or not active online and some didn't fill this in. *“Not using phones on holiday”*

Facebook 53%
 Instagram 23%
 WhatsApp 19%
 Offline 4%
 Twitter 1%

ACCOMMODATION:

10. Where are you staying?

Not staying over: **8** Friends & Family: **66** Booked Accommodation: **114** Own Holiday Homes: **23**

Room for growth.

Accommodation 54%
 VFR (Visiting Friends & Relatives) 31%
 Holiday Homes 11%

Day visitors 4%

11. Which area are you staying in?

Amanzimtoti (3); Bazley (1); Betania Mission (1); Freeland Park (1); Gamalakhe (1); Glenmore (1); **Hibberdene (37)**; Kelso (1); KwaNzimakwe (1); Leisure Bay (2); Margate (21); Mellville (1); Mtwalume (1); Munster (1); Palm Beach (4); Park Rynie (3); Pennington (8); Port Edward (12); Port Shepstone (4); Pumula (1); Ramsgate (14); Scottburgh (21); Shelly Beach (8); Southbroom (3); Southport (2); St Michaels on Sea (6); Sunwich Port (1); Trafalgar (2); Umkomaas (3); Umtentweni (2); Umzinto (1); Umzumbe (3); Uvongo (20); Wild Coast Sun (2)

These figures are skewed by the low participation of aforementioned VICs, so we cannot gain any significant insight from this. What was clear was that some people did travel around the KZN South Coast, staying in one area and going to a VIC in another, even though there is a VIC in their area of stay.

Hibberdene 19%

Scottburgh 11%

Margate 11%

Uvongo 10%

Ramsgate 7%

Port Edward 6%

Pennington 4%

Shelly Beach 4%

St Michaels on Sea 3%

Outside South Coast 3%

Other (1-3 p/area totalling 23 places) 21%

12. How did you decide where to book your accomm?

Ad (2); AirBnB (2); Been here as a kid, grew up here, lived here, previous visits, repeat (7); Blue Marlin Hotel (1); Booking.com (2); Cheapest option, Price (2); Close to the beach, seaside view (3); Drove past Hibberdene (1); Estate agent (1); Every time stay here/Every year (2); Facebook (1); Facilities (1); Family (12); Friends (16); Friend's Place (2); Lekkerslaap website (1); **Online, websites (40)**; SANDF (2); Social media (1); Timeshare (2); Travel agent (1); Vacation Club (2); VIC (3)

Online & agents 44%

Family, friends, friend's place 28%

Repeat 8%

Other 5%

Timeshare, Vacation Club 4%

Close to the beach, seaside view, facilities 4%

VIC 3%

Cheapest option, price 2%

Advertising 2%

13. How long in advance did you book your trip?

Less than a month: 50 1 month: **21** 1-2 months: **19** 2-3 months: **20** 3-4 months: **9**
4-5 months: **6** 5-6 months: **7** 6-8 months: **11** 8-10 months: **4** 10-12 months: **13**
more than 12 months: **12**

This is highly revealing. The global last-minute trend has also influenced the booking behaviour of the domestic market. This is due to consumers, largely influenced by digital technology, being more demanding and seeking instant gratification and service, as well as factors such as being time poor.

Less than a month – 1 month 41%

1-3 months 23%

3-6 months 13%

6-12 months 16%

More than 12 months 7%

14. How long are you staying in the South Coast?

1 day: **8** 2-3 days: **10** 4-7 days: **65** **8-14 days: 88** 15-30 days: **29** more than 1 month: **8**

Length of stay will have to be checked seasonally. For summer, which is generally the main annual holiday, the majority length of stay was 8-14 days in 2018.

8-14 days 42%

4-7 days 31%

15-30 days 14%

2-3 days 5%

1 day 4%

1 month plus 4%

15. What would you rate the Internet connectivity at your accommodation?

1 (least): **46** 2: **17** 3: **32** 4: **25** 5 (most): **45**

Even though it would seem that the majority of accommodation establishments have great Internet connectivity, more than half of establishments rate poor-average, which is not great for marketing purposes, considering other insights in this survey (see point 20 especially), you want to enable visitors to share their inspiration and user-generated content while they are here and able to find your content and promotions, clearly the experience around the KZN South Coast region is inconsistent with visitors experiencing extremes on either end in terms of service:

Good (4-5) 42%

Poor (1-2) 38%

Average (3) 19%

“No signal/service”; “no Internet”; “no WiFi”; “overloaded”; “can’t connect”; “poor connection at Park Rynie”; “building & tower position”; “unwind not use”; “mobile data fine”; “no good between the bushes”; “own Internet”; “aerial nearby”; “WiFi was great”; “excellent”; “WiFi is free”

16. How would you rate your accommodation?

1 (least): 4 2: 3 3: 30 4: 50 5 (most): 66 Reason:

The majority of visitors (76%) rated our accommodation highly. The reasons given tell the story for those establishments who want to know what visitors are looking for or what the factors are that may affect someone’s stay negatively.

<p>5 rating 43% 4 rating 33% 1 rating 3% 3 rating 2% 2 rating 2%</p>

Negatives:	Positives:
<p>Not good, terrible (2) No/bad signal (2) Poor hygiene, not very clean (2) Overcrowded (1) Not 5 star (1) Furniture need to be replaced (1) Old hotel (1) No aircon (1) No swimming (1)</p>	<p>Lovely stay, Beautiful, good, everything on point, best, natural (25) Clean, tidy, bathroom clean (14) Secured (9) Sea view, close to/right on beach (9) Dishwasher, aircon, good facilities, wonderful (3) Reasonable, suitable (3) Well maintained (2) Camping good, Lake Eland camping (2) Friendly people, good service (2) Comfortable (2) Quiet (2) Pet-friendly (1) Family (1) Vibe (1)</p>

ATTRactions, ACTIVITIES & BEACH EVENTS:

17. Other than enjoying the beaches this summer, have you visited or booked any of our attractions or activities, or are planning to?

YES: 107 NO: 98

This indicator shows that about half of visitors want to get out there to see and do things, but the other half are quite happy to stay in one place and relax, something they don't get to do back home. This is one of the reasons people enjoy the destination. Cost may also be a factor, as our destination appeal to those who are travelling on a budget, so attractions that can be visited for free or that cost little may nudge people out and may make them look at activities and attractions in future, also specials that may trigger a decision to explore something appealing.

Yes 52% No 48%

Attractions visited, booked or planning to visit	Activities visited, booked or planning to visit	Attractions & Activities not in KZN South Coast
Oribi Gorge (28) Macbanana (16) Beaver Creek (6) Crocworld (4) Crocodile farm (3) Riverbend Farm (3) Pure Venom (3) Lake Eland (2) Waffle House (2) Shelly Centre (2) Deep sea (1) Snake park (1) Hibberdene Supertube (1) Voetplaas Park Beach (1) South Coast Mall (1) Port Shepstone town (1) Ramsgate (1) Villages (1) Red Desert (1)	Horseriding incl. on beach (5) Fishing (3) Shark cage diving incl. Shelly Beach (3) Zipline incl. Macbanana (2) Boat rides, boat trip (2) Diving (2) Golf incl. Margate, Southbroom (2) Cycling (1) Butterfly tour (1) Gorge swing (1) Skydiving (1) Surfing (1) Rock climbing (1) Sani2C (1) Services (1)	Wild Waves, water park, Wild Coast Sun, Wild Waters (6) uShaka Marine World, Shaka (3) Ballito (1) Durban (1) Galleria Mall (1) Umhlanga (1) Not yet, still looking, planning (14) <i>Many (1)</i> <i>New activity (1)</i>

18. How would you rate our beach entertainment?

1 (least): **19** 2: **7** 3: **33** 4: **44** 5 (most): **48** Reason:

The majority of visitors (**61%**) rated the beach entertainment on the high end, but 18% rated it on the low scale when they haven't seen much or feel there aren't enough activities on the beaches where they are when they are there. This, as well as the positives, give good insight into what to take into account when doing the new beach event programmes for 2019.

5 rating 32% 4 rating 29%

3 rating 22%
1 rating 13%
2 rating 5%

Negatives:	Positives:
Not seen much, none (yet), not a lot going on, not too many activities, nothing to do eg slides, jumping castles, less activities, Port Edward beach less activities, quiet (18) No (live) entertainment (3) Normal (1) Still want more (1) Too many people (1) Fishing (1) Haven't participated (1)	Excellent, amazing, best, enjoy, great fun, good (11) DJ's, music, entertainment (4) Love slides, paddle boats (4) Clean (4) Kids fun, kids loved it (3) Safety & security (3) Good beach, nice facilities (2) Lifeguards (1) Good vibe (1) Controllable (1) Oros (1) Variety (1)

INFORMATION SOURCES:

19. How did you find out about the South Coast?

Friends **69** Family **127** Social Media **28** Magazine **9** Newspaper **4** Radio **0** TV **0**

Website **28** Other: Know it, grew up/lived here, repeat **10** Holiday Club/Vacation Club **2**
 MTN **1** Sign **1**

“Visited here for 55 years”

This is hugely significant in terms of where the majority of our marketing efforts need to lie to ensure that new visitors are inspired and encouraged to visit the KZN South Coast. Word-of-mouth from trusted sources continue to be the biggest inspiration, followed by online sources, which account for 90% of the sources that will lead to new growth:

<p>Word-of-mouth (family & friends) 70% Online (social media & websites) 20% Traditional (magazines, newspaper, radio, TV, sign) 5% Repeat 4% Other 1%</p>

20. Now that you are here, which sources of information do you use?

Accommodation Staff: **22** Locals: **39** Local Newspapers: **15** Mobile App: **30** Shops: **15**
 Social media: **30** Southern Explorer route guide: **14** Tour Guides: **7** Visitor Information Centres: **46** Websites: **21** Other: Info board on beach **1**

The figures again show the significance of Word-of-Mouth and Online, VICs will be skewed due to the surveys having taken place in VICs. Hugely significant is that this point has to be looked at in conjunction with Point 15 re. Internet and mobile connectivity, which when poor or non-existent will impact the most powerful way to influence visitors while they are here, e.g. to drive them to attractions, activities, events, hinterland, etc., which we know based on travel behaviour trends the majority decide on once they are in-destination.

<p style="text-align: center;">Online (mobile app, social media, websites): 35% Visitor Information Centres 19% Locals 16% Establishments & shops 15% Southern Explorer 6% Local papers 6% Tour guides 3%</p>
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COMPETITION:

Entered the competition:

YES: **181** NO: **23**

We secured a weekend away for 4 people at the Blue Marlin Hotel in Scottburgh, and are very grateful to them for their partnership. This was clearly sufficient to attract 89% of respondents to submit their details to us, so a strong enough motivator for participating in the survey, which will always be difficult due to people being on holiday and naturally not very keen to participate in surveys.

<p style="text-align: center;">Yes 89% No 11%</p>
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Would you be interested in receiving a quarterly South Coast newsletter from us?

NO: **77** YES: **98**

We've grown our consumer database by 98 people, minus the illegible entries/incomplete forms (email address missing).

<p style="text-align: center;">Yes 56% No 44%</p>
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More Recommendations:

- Follow up sessions with the VIC supervisors of the under-performing offices
- More time training VIC staff prior to data gathering exercise to ensure better understanding, objectives, importance, accuracy and completeness; supervisors to set an example and to check interns' performance during the survey period to correct mistakes, this will also fix the geographic spread requirement
- Follow up with establishments who are not members to sign up

- Digital capturing by visitor via tablet, website or mobile app to eliminate illegible handwriting and incorrect capturing, as well as to make the survey faster and easier to respond to, with multiple step by step screens to not be intimidating; digital capturing by VIC staff for those visitors who are not techno-savvy; the step-by-step process will also eliminate important information getting skipped
- Survey to be conducted at different sources of information if we are measuring sources of information
- Installation of fibre in tourist regions for better Internet speeds & connectivity, this will allow for influencing and dispersing tourists, ability to send promotional triggers, better experience and chance to share their photos and experiences with friends and family via digital channels, which in turn becomes a powerful Word-of-Mouth driver; this does not interfere with those visitors who detox from digital as they either don't bring their phones/devices or use it by choice, it does not interfere with their quiet and peaceful environments
- Based on majority indications, develop a typical visitor profile to assist marketing activities
- Take account of positives and negatives, motivators and detractors
- Develop strategies around these insights to maintain and improve visitor perception, as well as to promote the destination
- Share the results with members, so they can benefit from the insights
- Everyone to keep up the good work and keep improving, we had a great season, visitors were happy, starting 2019 on a high note!

THANK YOU