

The Tsogo Sun Sprint 2015 Impact Assessment: Top Line Summary Report



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Methodology



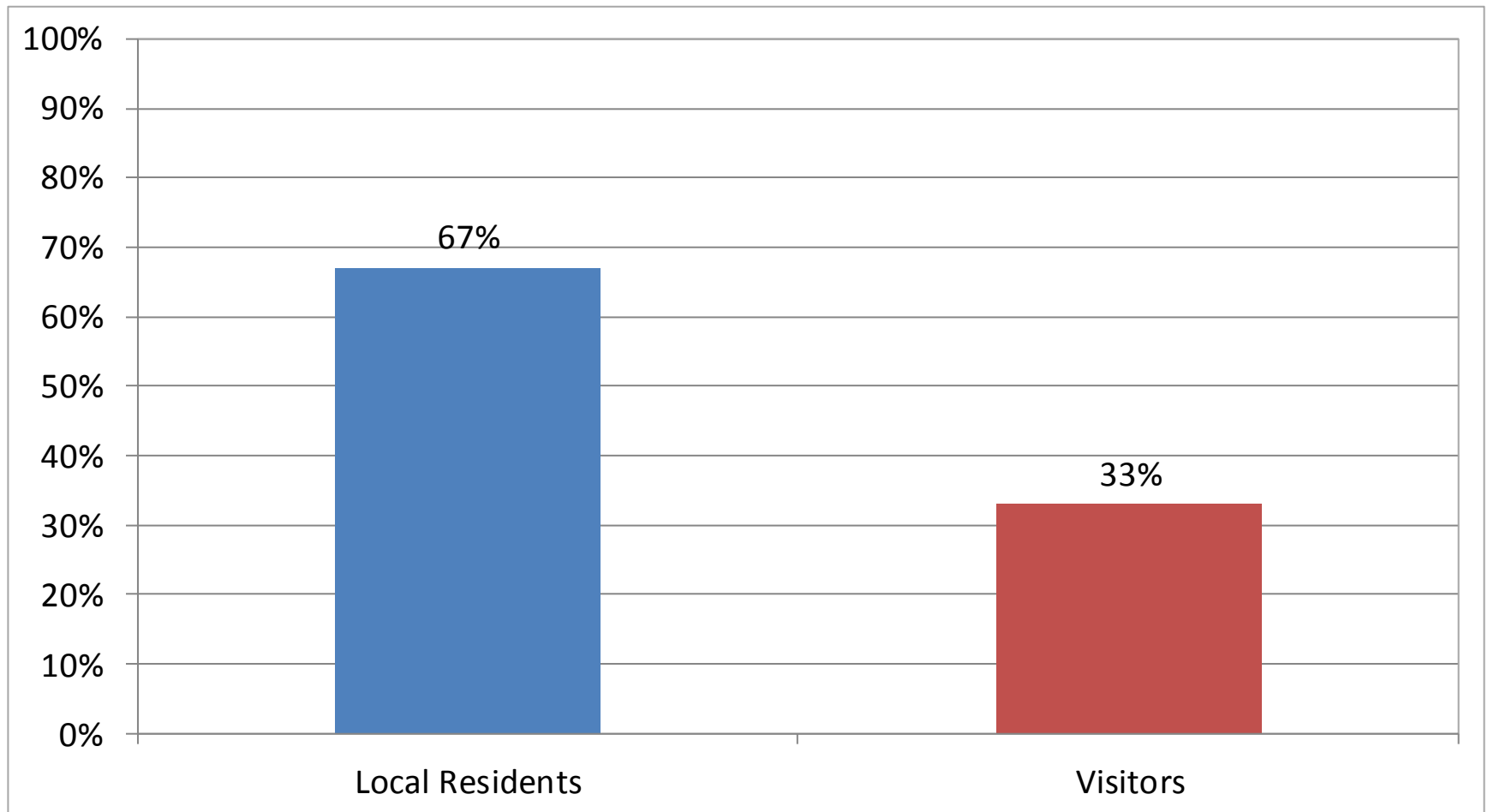
- Face to face survey with a probability sample of 201 respondents.
- Respondents systematically selected throughout the day of the event.
- The event was held on the 23rd of May 2015

Positive Highlights



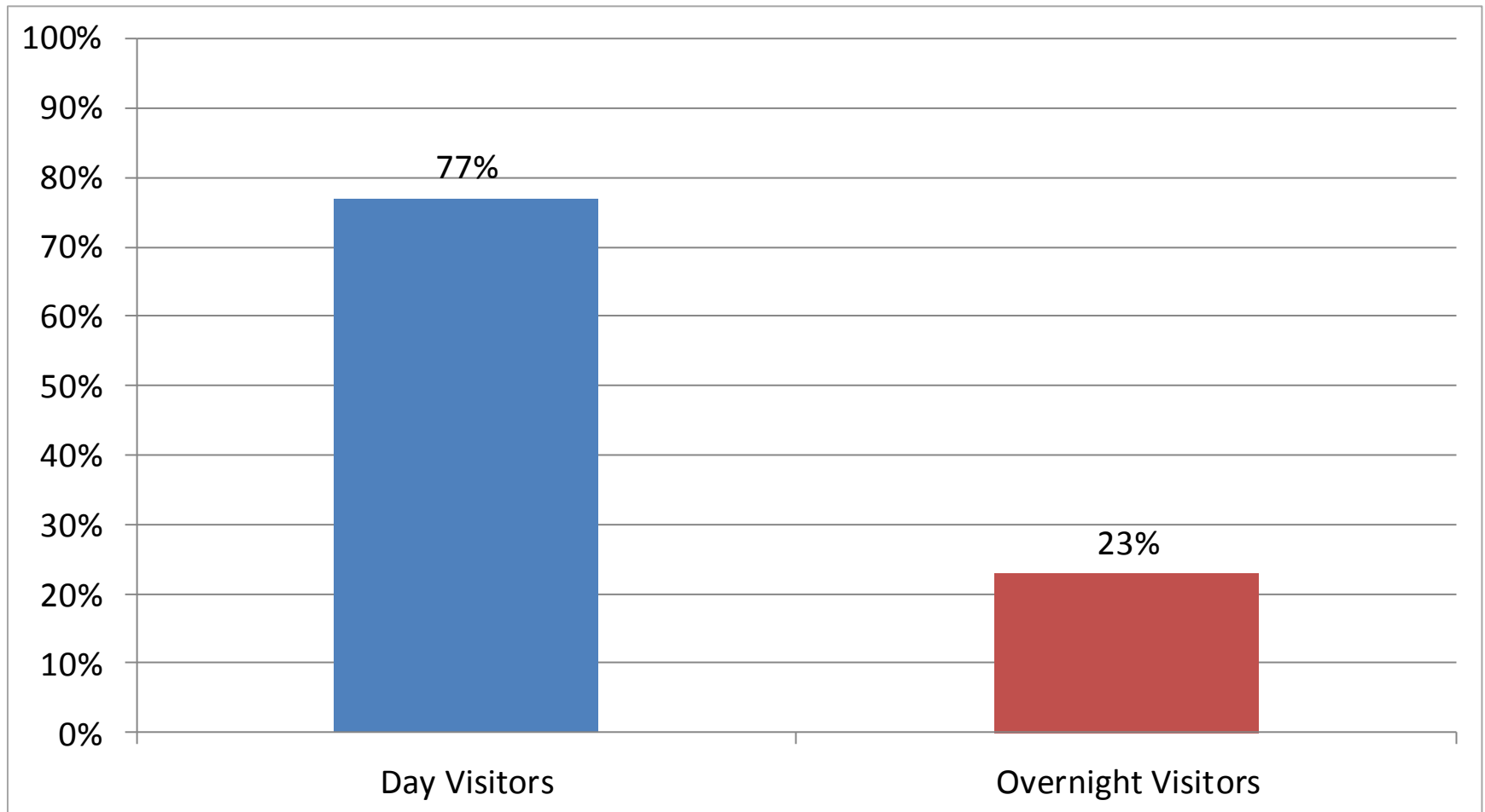
- The event attracted the respondents to the area with 74% of them indicating they were in the area specifically for the event
- 94% of the respondents were satisfied with information provided regarding the event
- The event was able to attract new attendees with 31% indicating they were attending for the first time
- Over 85% of the respondents said they would attend the event again
- 82% of the respondents had either a *good* or an *excellent* experience at the event
- 94% of the respondents did NOT experience any problems at the event
- Over 95% of the respondents said they would recommend the event to family and friends
- 100% of the respondents said they would recommend KZN to family and friends
- Over 80% of the respondents had noted the TKZN logo prior to the event

Nature of Tsogo Sun Sprint Spectators: Local vs Visitor



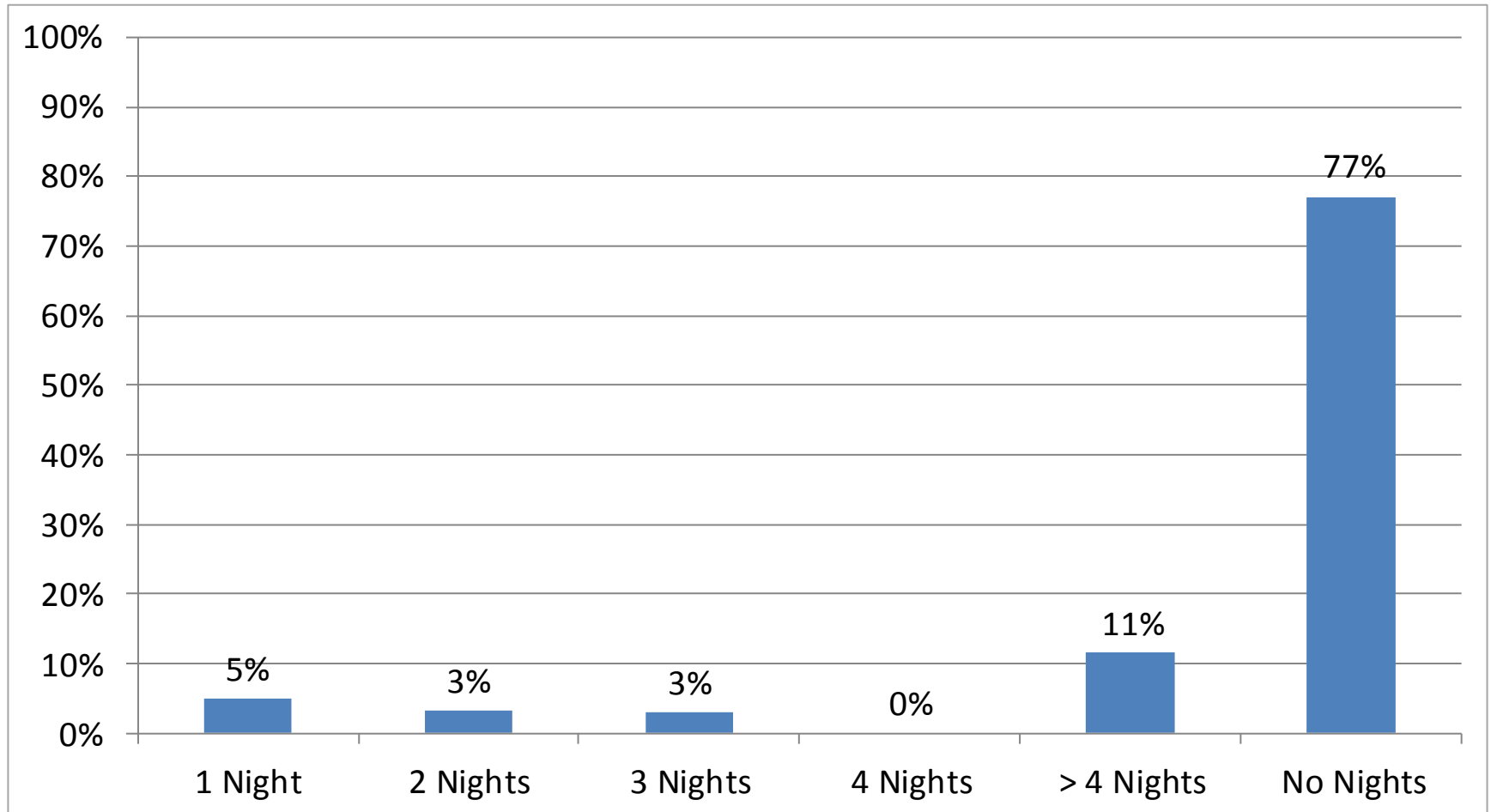
It is interesting note that the majority of the respondents were locals (67%). This shows that the event has attracted a large number of people from Pietermaritzburg.

Visitors: Day or Overnight



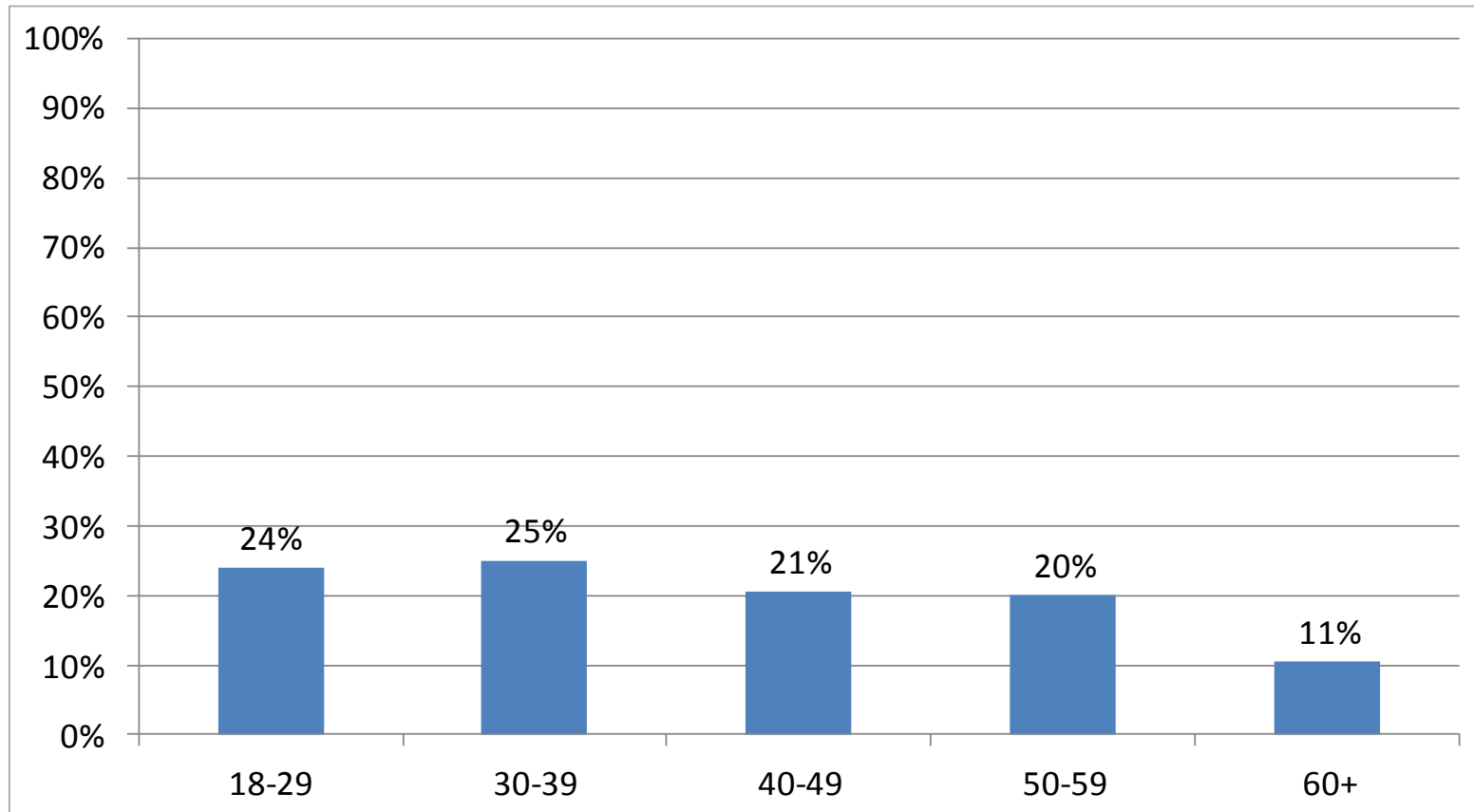
Out of the total number of visitors (33%) to the event (i.e. people from outside of Pietermaritzburg), the majority of them were day visitors (77%), whereas 23% were overnight visitors.

Visitors: Length of Stay



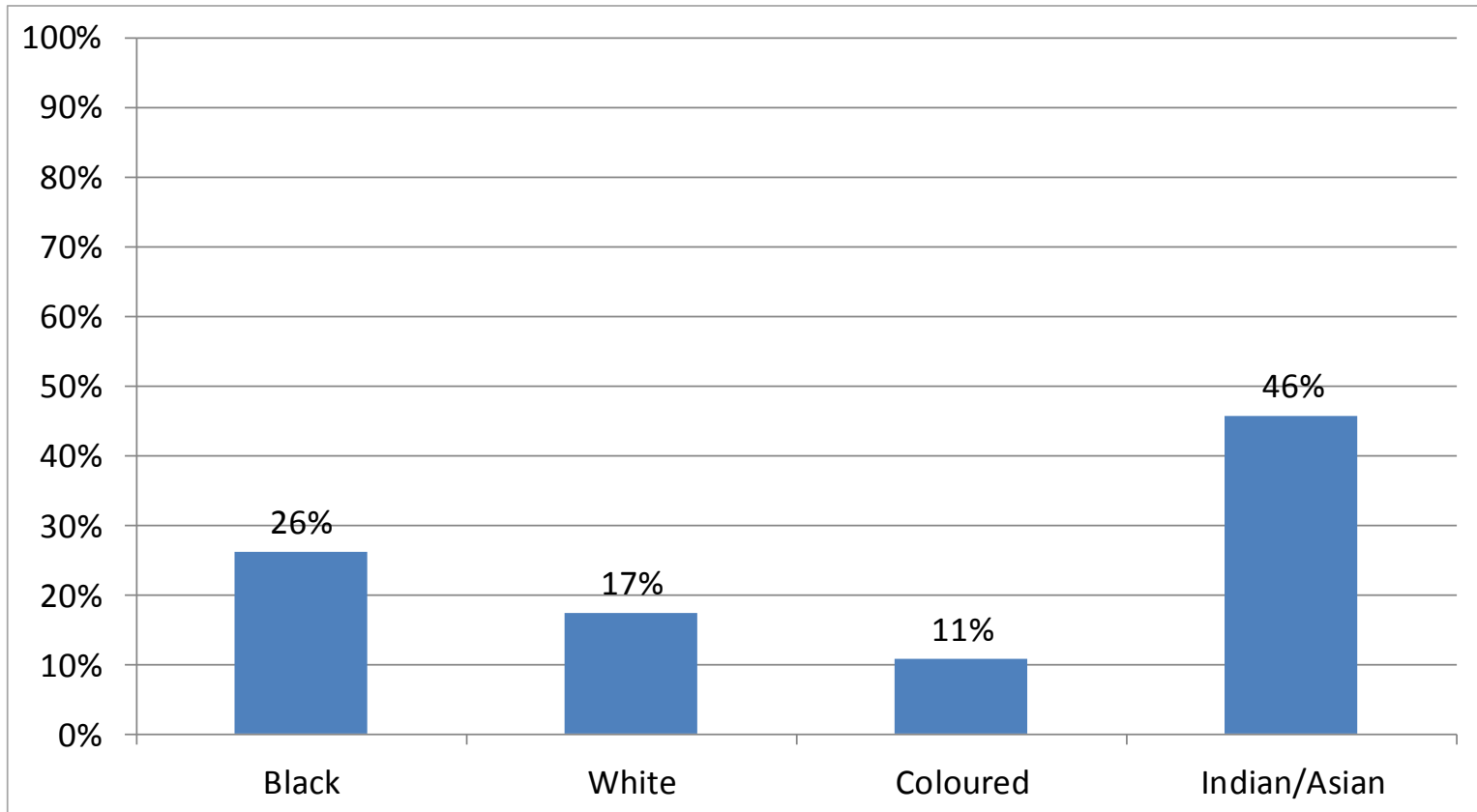
This slide/graph coincides with the previous slide as it shows that the vast majority of visitors were Day Visitors as they did not stay overnight. The majority of these came from other towns/cities in KZN such as Durban and Howick.

Tsogo Sun Sprint Spectators Demographics: Age



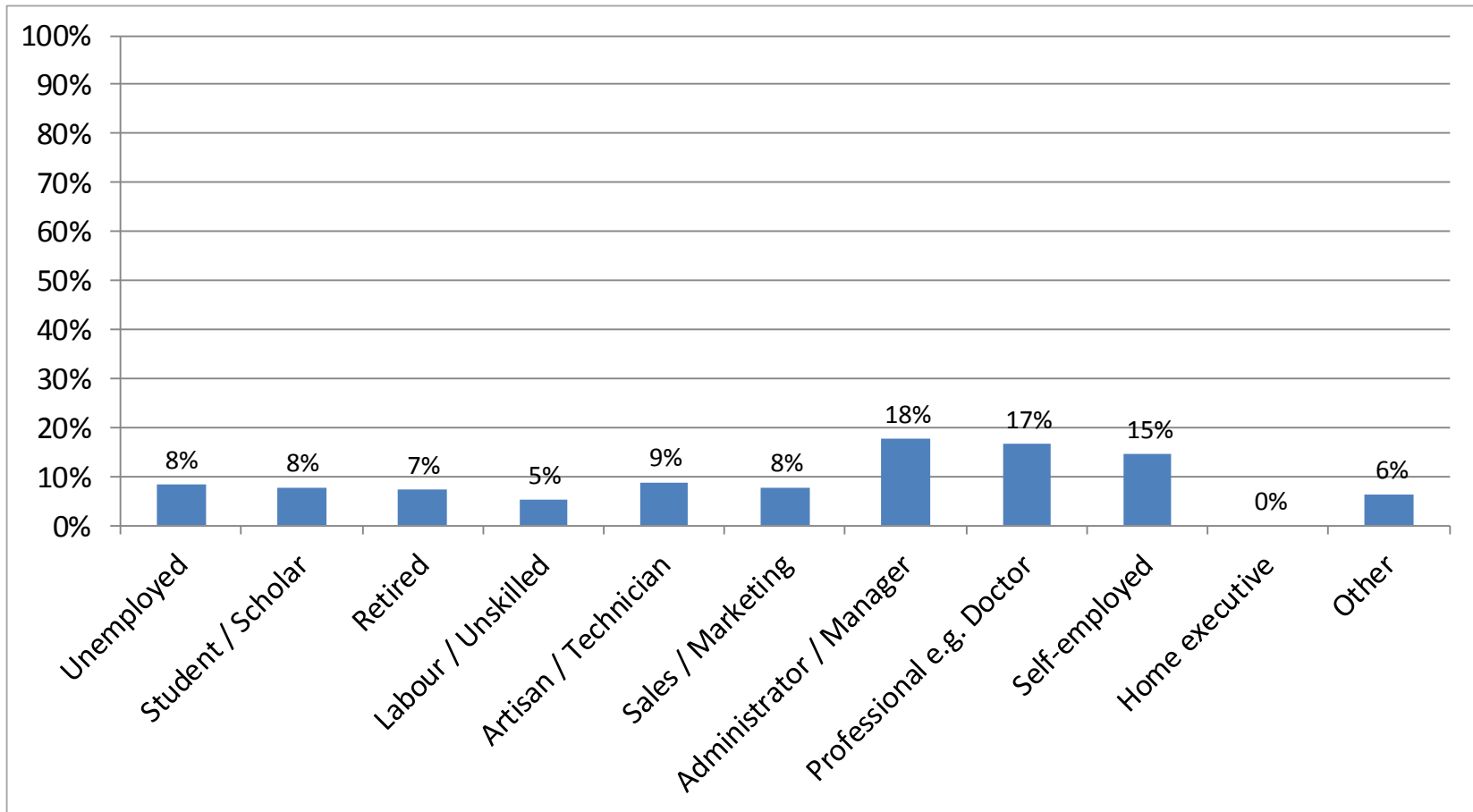
In terms of the age groups of the spectators, the majority of the respondents fell into the age groups, “30-39” (25%) followed by “18-29” (24%). This was followed closely by the age groups, “40-49” and “50-59”. There are no significant differences between the different age groups and this information is useful for future promotional activities.

Tsogo Sun Sprint Spectators Demographics: Population Groups



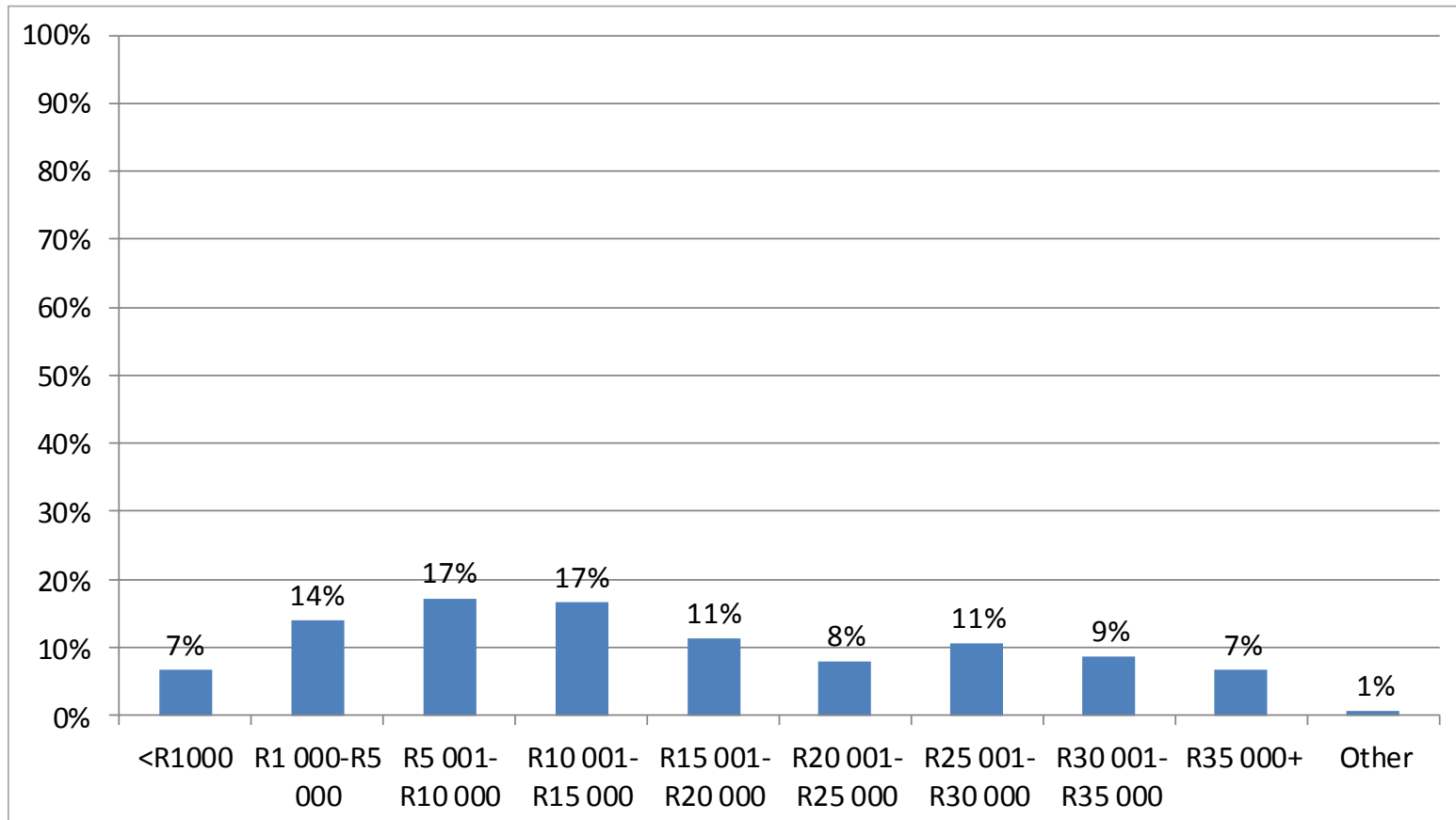
In terms of the population groups of the spectators, the majority of the respondents were “Indian Asian” (46%). This was followed by “Black” (26%) and the “White” (17%). This information is also useful for future promotional activities. It is not surprising that the majority were “Indian/Asian” as horse racing is a popular sport with this group. In addition to this, Pietermaritzburg has a high population of Indian people and a lot of them live in close vicinity to the race course and casino complex.

Tsogo Sun Sprint Spectators Demographics: Occupation



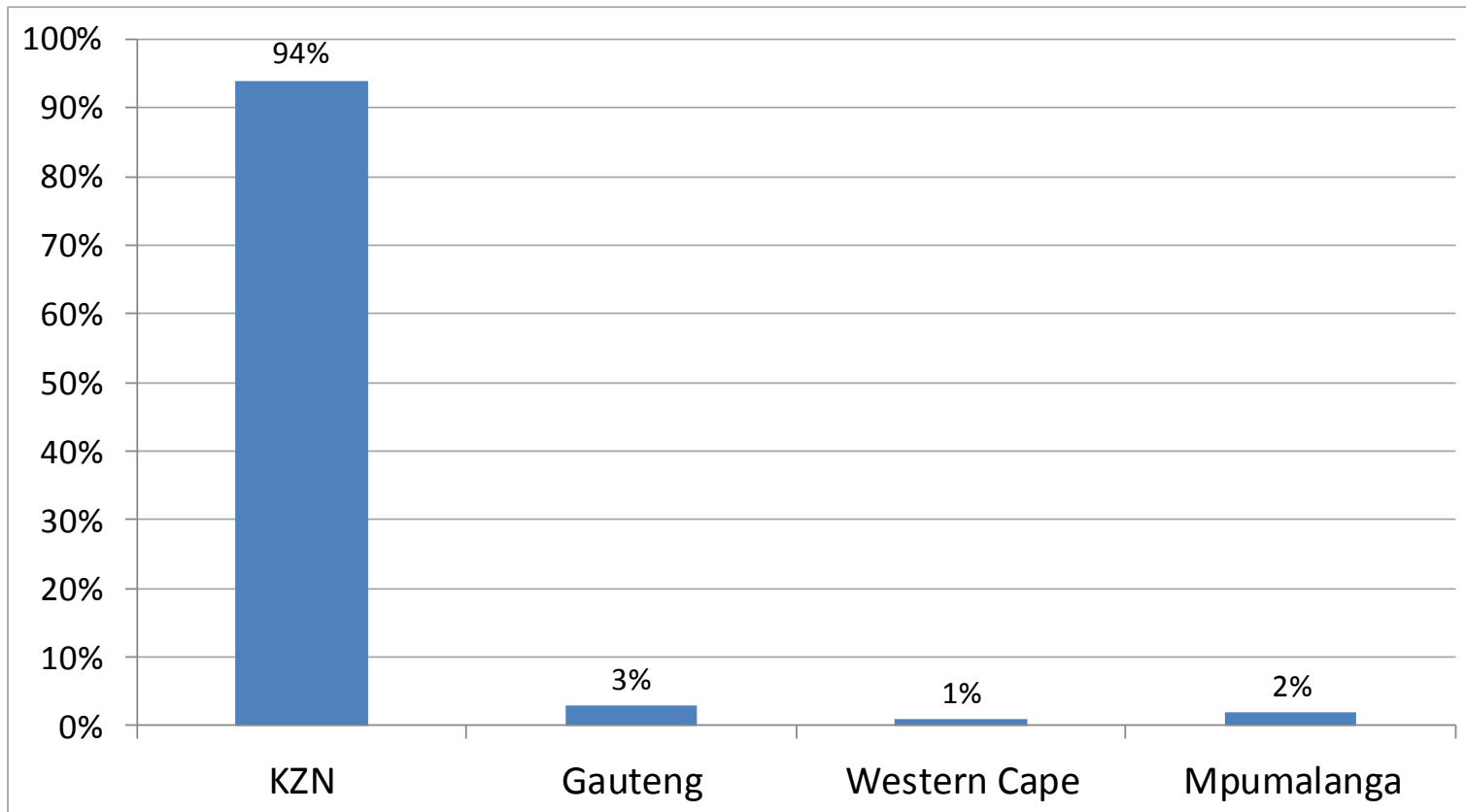
The majority of the respondents fell into the occupation group, “Administrator/Manager” (18%). This was followed closely by “Professional” (17%) and “Self-Employed” (15%). It is important to note that “other” includes those respondents who are involved in the training of horses, betting companies such as Gold Circle or who are “bookies”.

Tsogo Sun Sprint Spectators Demographics: Income Group



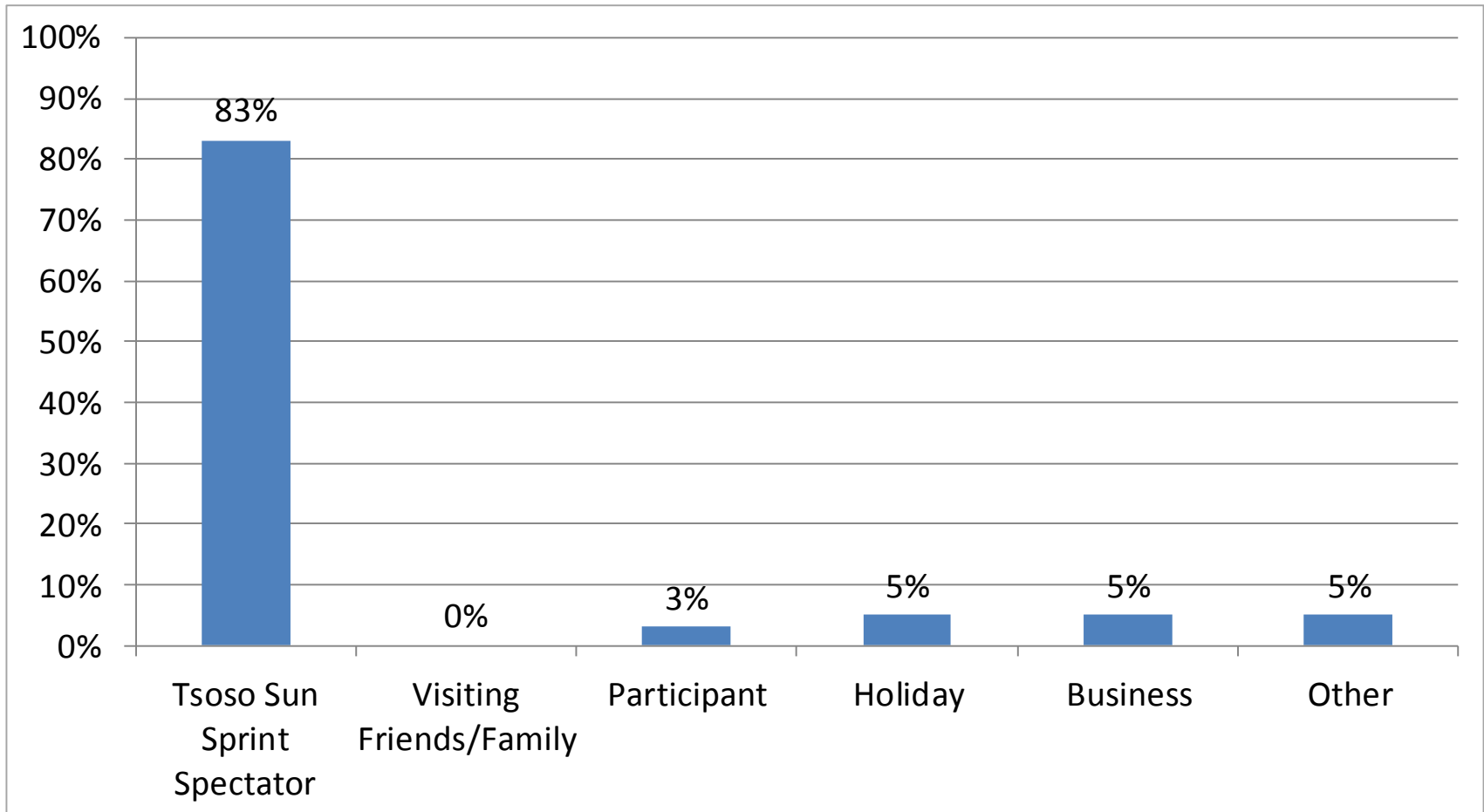
When asked about their income level the majority of the respondents fell into the following income groups: “R5 001 - R10 000” and “R10 001 - R15 000 (17%). This was closely followed by the income group “R1 000 - R5 000” (14%) and “R15 001 - R20 000”/“R25 001- R30 000” (11%).

Nature of Tsogo Sun Sprint Spectators: Province of Origin



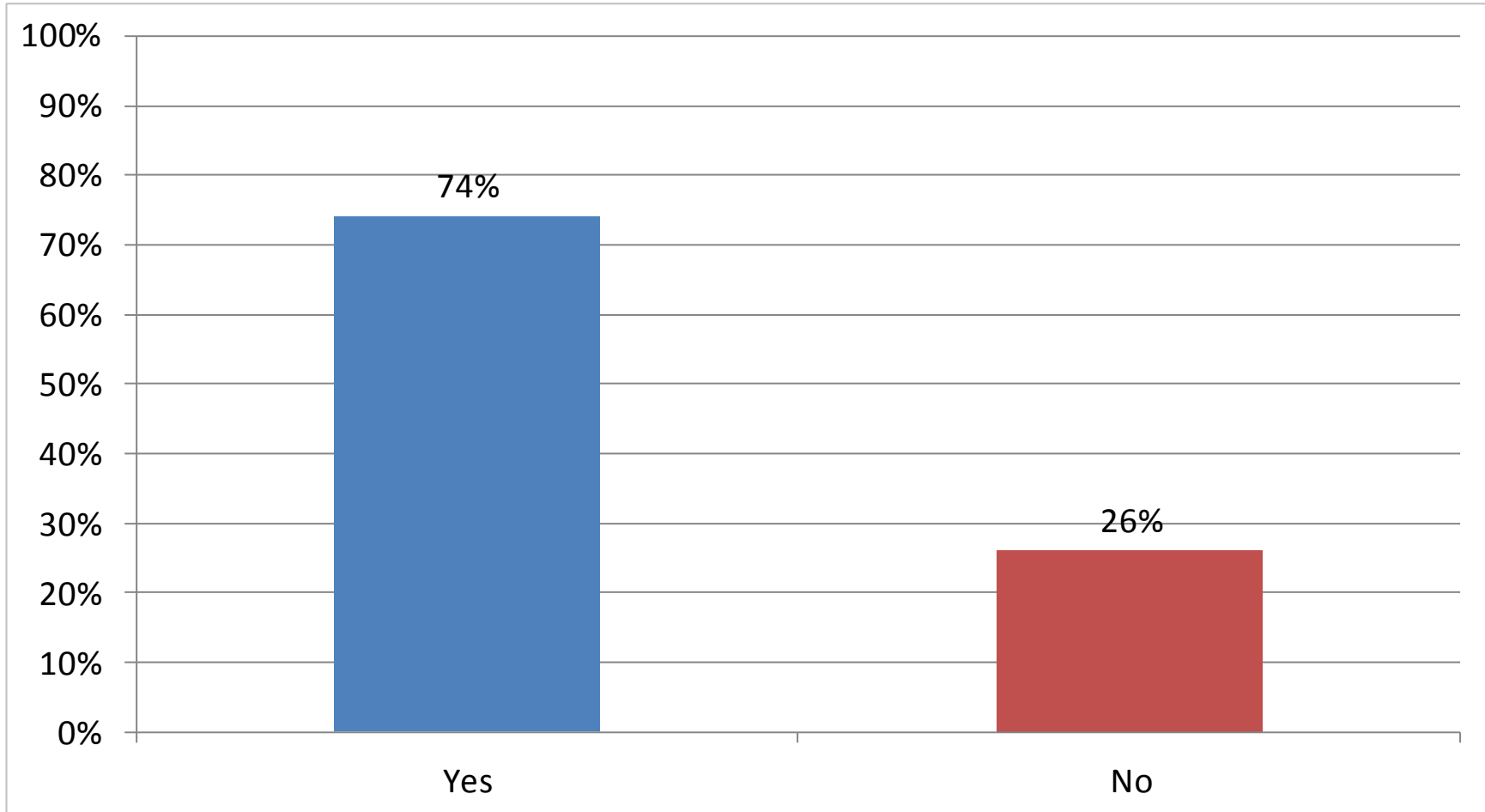
This slide compliments slide 11 as it shows that the majority of the respondents were from KZN (94%). A small number of respondents were from Gauteng (3%), followed by Mpumalanga (2%) and the Western Cape (1%).

Primary Reason for Visiting Pietermaritzburg



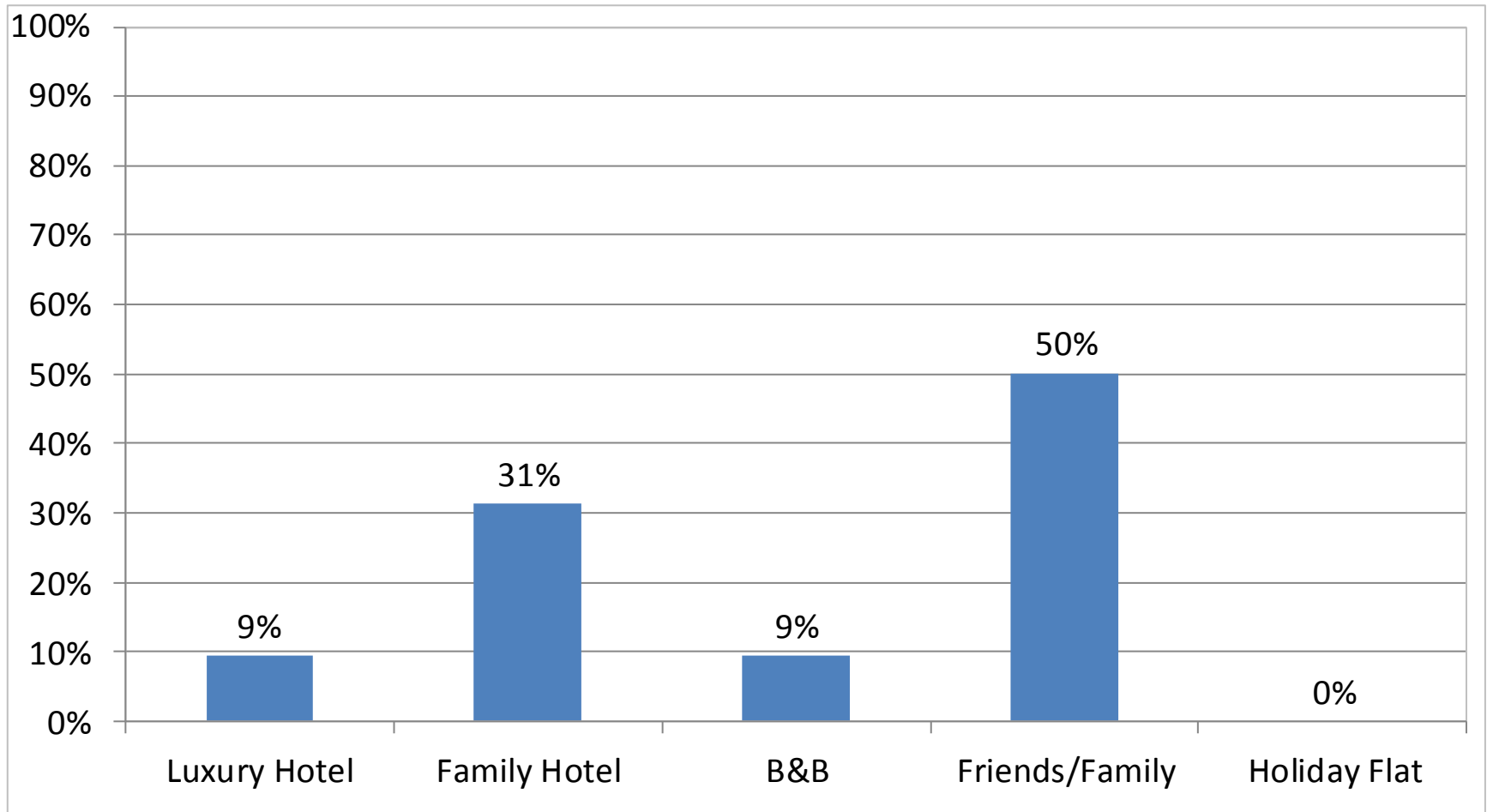
The vast majority (83%) of respondents indicated that they were visiting Pietermaritzburg, at the time, primarily for the event. It is important to note that “other” included those who were involved in the training of the horses or in the organization of the event.

Visit Coincide with the Event



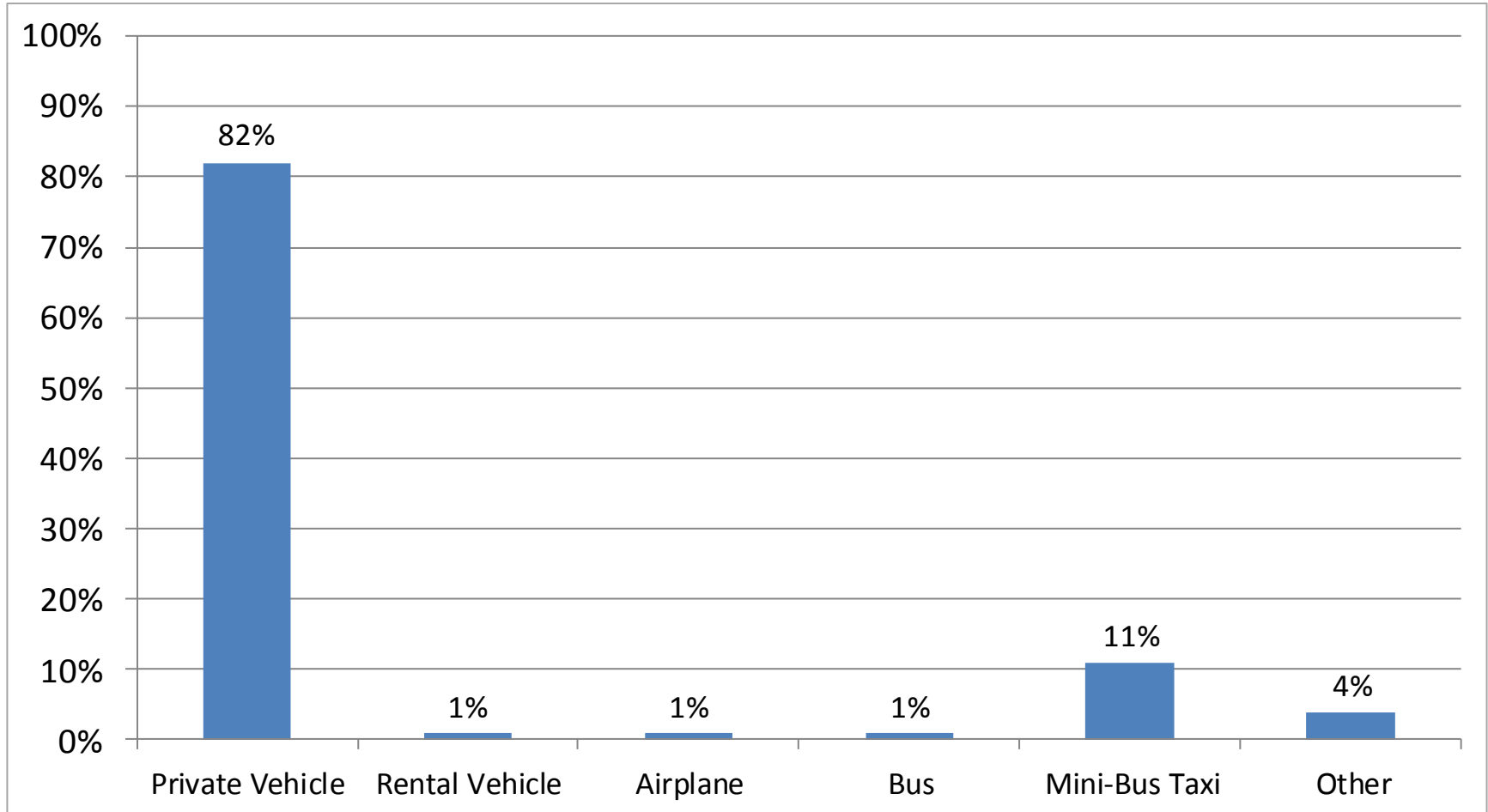
When asked about whether or not their visit was aimed at coinciding with the event, the majority of the respondents indicated that they had (74%). This means that 26% of the respondents had not planned to attend the event, but were still present on the day.

Accommodation Types



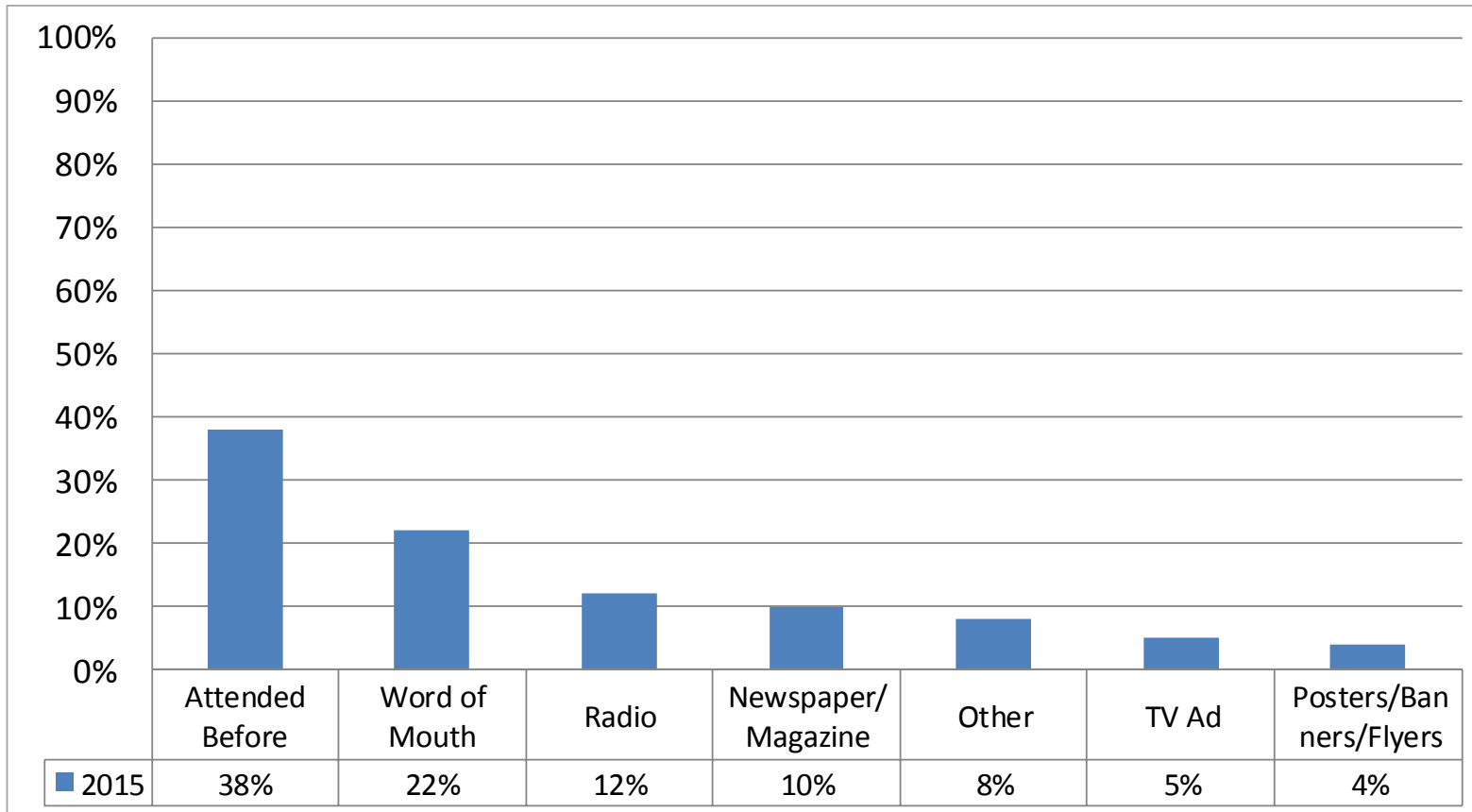
When the visitors were asked which type of accommodation they stayed in, 50% of them said that they had stayed with their family or friends. This is not a good sign for the economic impact of the event as there is minimal spending on accommodation. The second most popular accommodation type was “Family Hotel” with 31% of the respondents indicating that they stayed in one.

Transport to Event/City: All



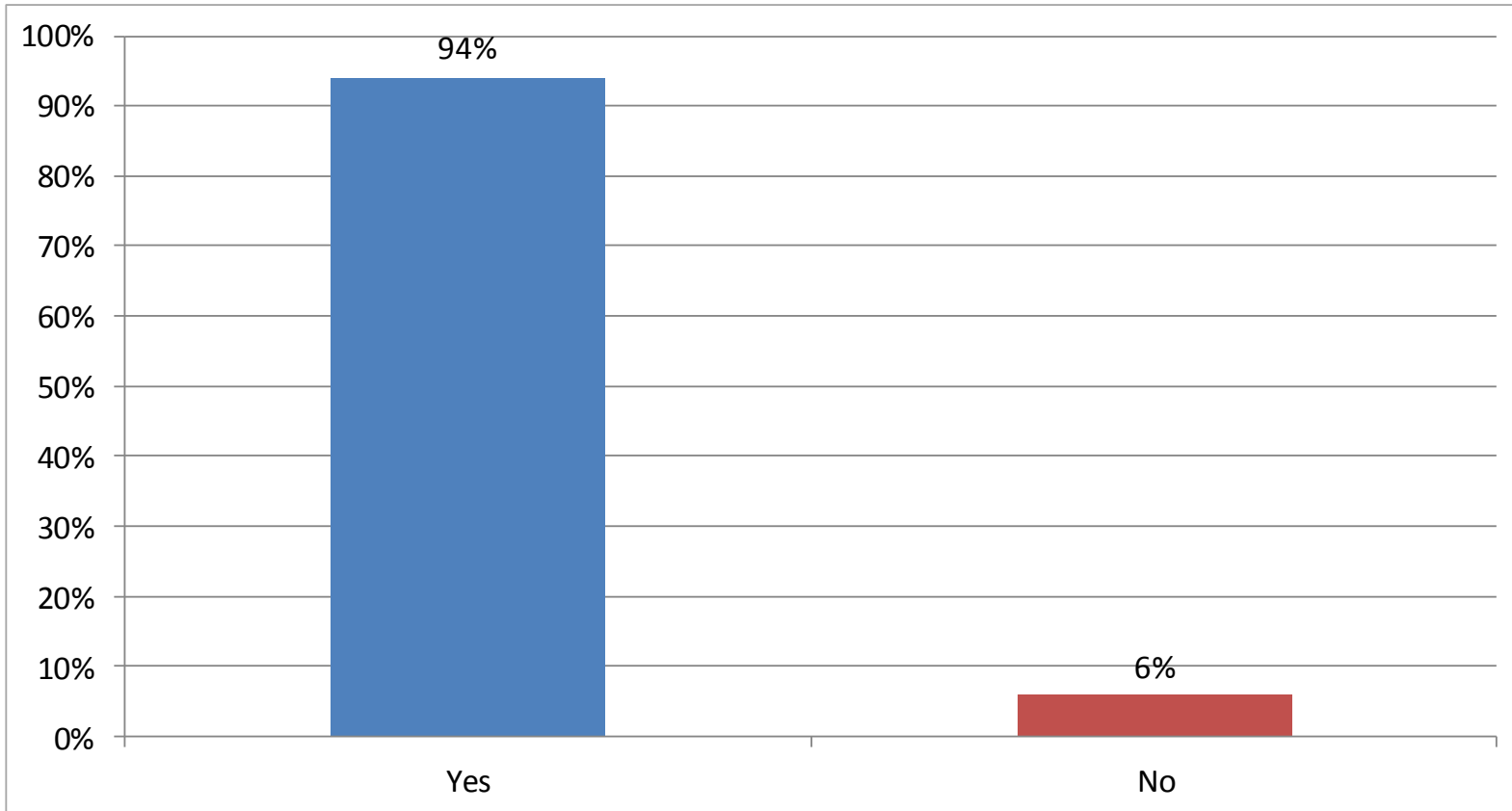
As the large majority of the spectators were local residents, it is not surprising that majority of people came to Pietermaritzburg and the event with their own vehicles (82%). This was followed by people travelling in “Mini-Bus Taxi” (11%). The fact that the vast majority of respondents were using private vehicles could possibly be the cause for the parking problems.

Influenced to Attend



When the respondents were asked what influenced them to attend the event, the majority indicated that they had been to the event before (38%). This was followed by “word-of-mouth” (22%) and “radio” (12%). Specifically, the radio station that everyone indicated was East Coast Radio. These results show that the event has a good reputation and is able to attract people year after year.

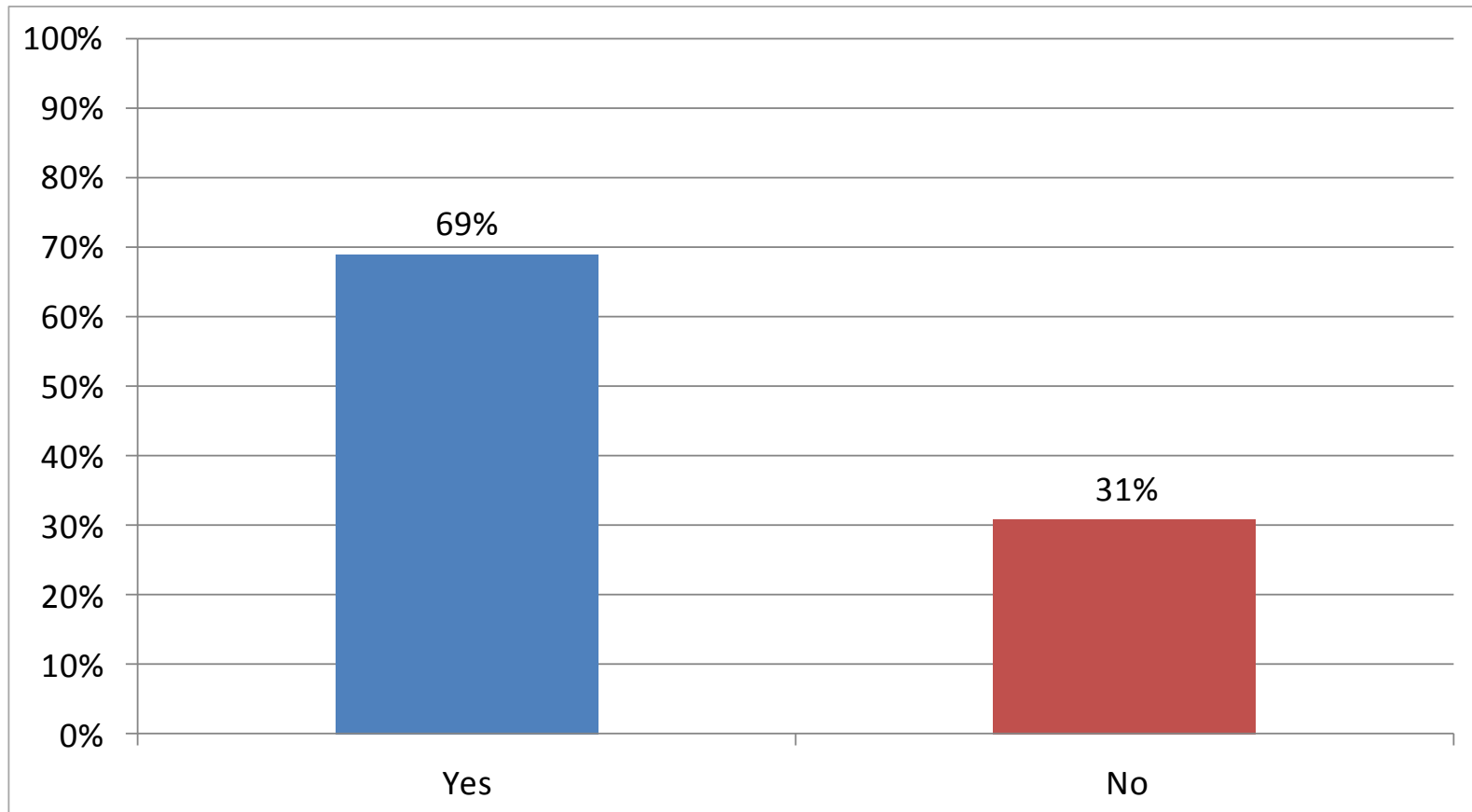
Information Satisfaction



When the respondents were asked if they were satisfied with the information about the event prior to attending, 94% said that they were. Of those 6% who were not satisfied, their areas of dissatisfaction were:

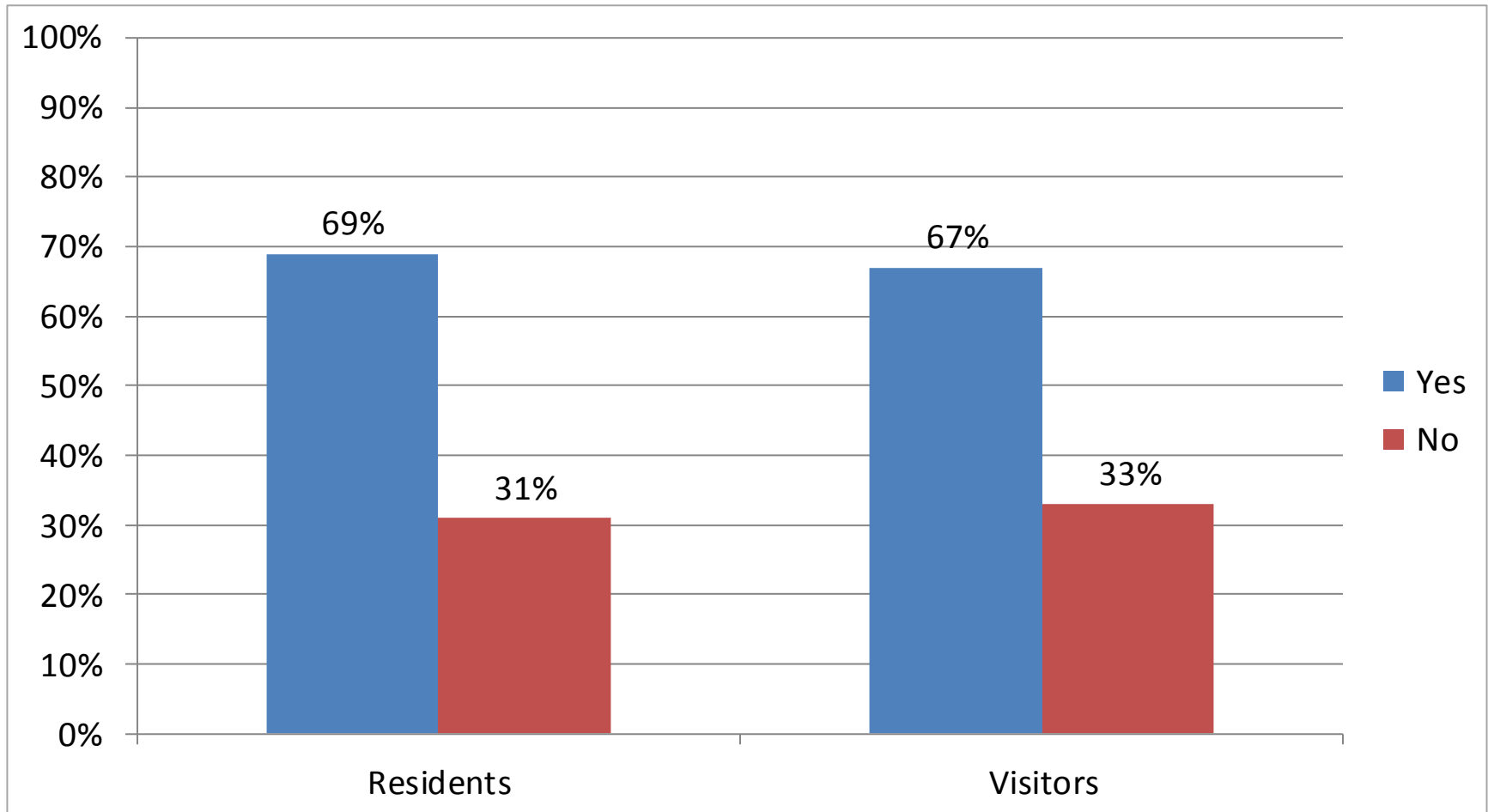
- Not well marketed in other cities/towns
- Starting times were not supplied
- More information should be provided on how everything works

Previous Attendance



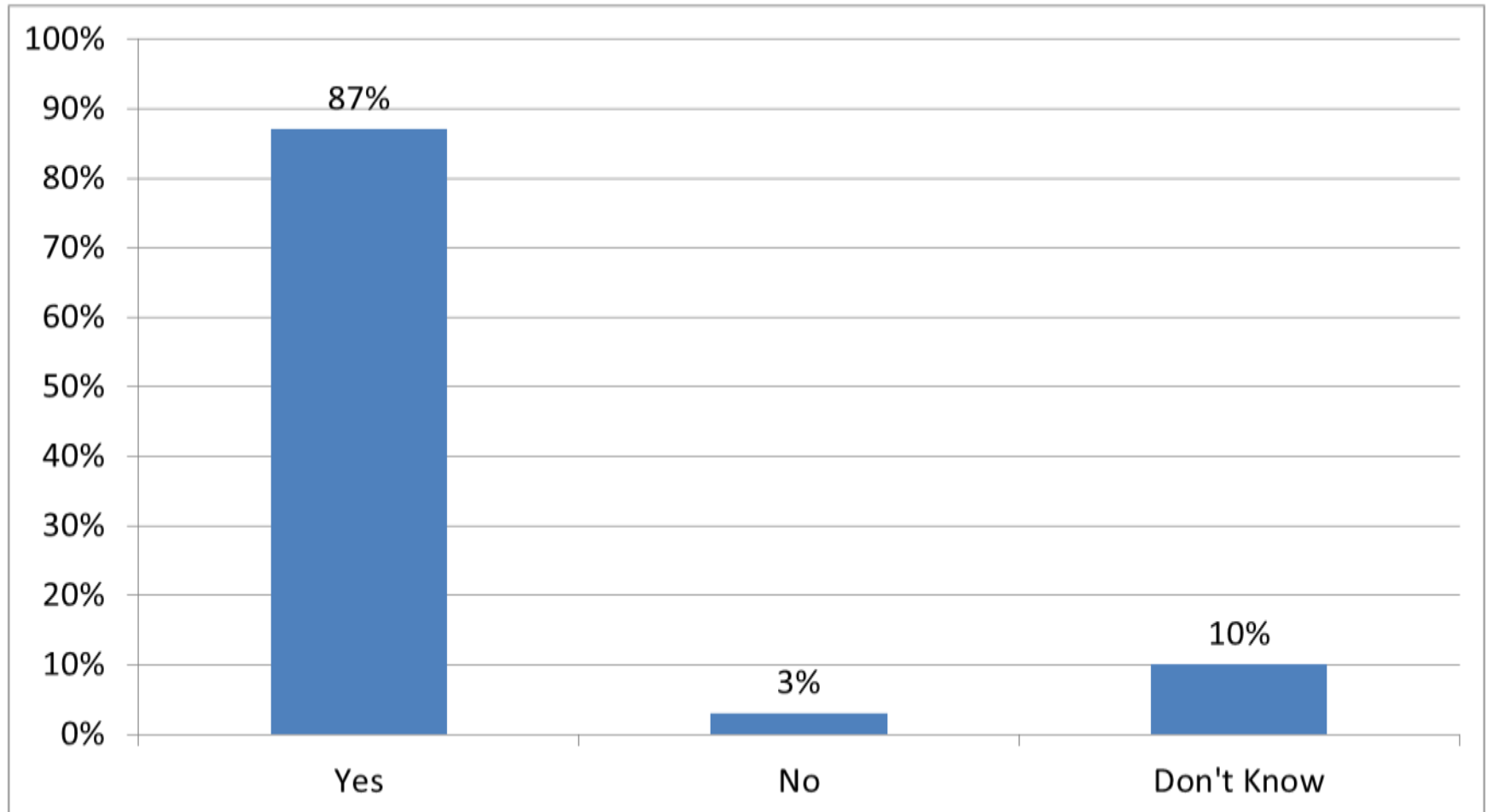
When the respondents were asked if they had attended the event in the past, 69% of them said that they had. Thus, 31% of the respondents indicated that they had NOT attended the event before. Both of these are very positive for the event. Firstly, these results show that the event is able to maintain its numbers on an annual basis. Secondly, it shows that the event can also continue to attract newcomers.

Previous Attendance (contd.)



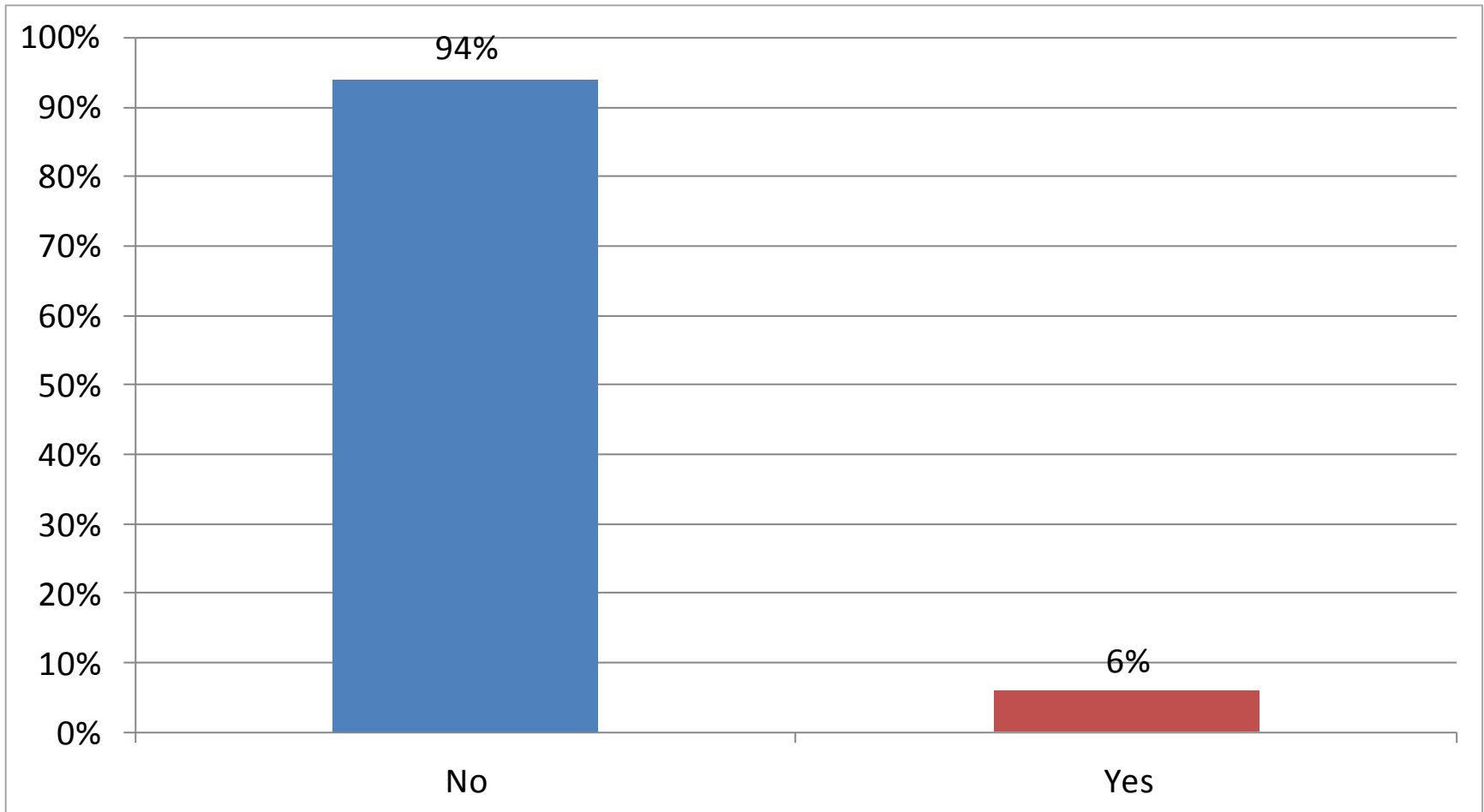
In relation to the previous slide, this graph shows the division between the residents and the visitors who have attended the event in the past. Once again, the results are positive as it shows that a majority of both local residents and visitors have attended the event before. In addition to this, a significant number of residents and visitors attended the event for the first time.

Future Attendance



When asked if they would attend the event again, a large majority (87%) of the respondents said that they would. This shows that the event is deemed to have a good reputation and is popular amongst the spectators. It is also positive to note that only 1% of the respondents said that they would NOT attend the event again in the future.

Experienced Problems?



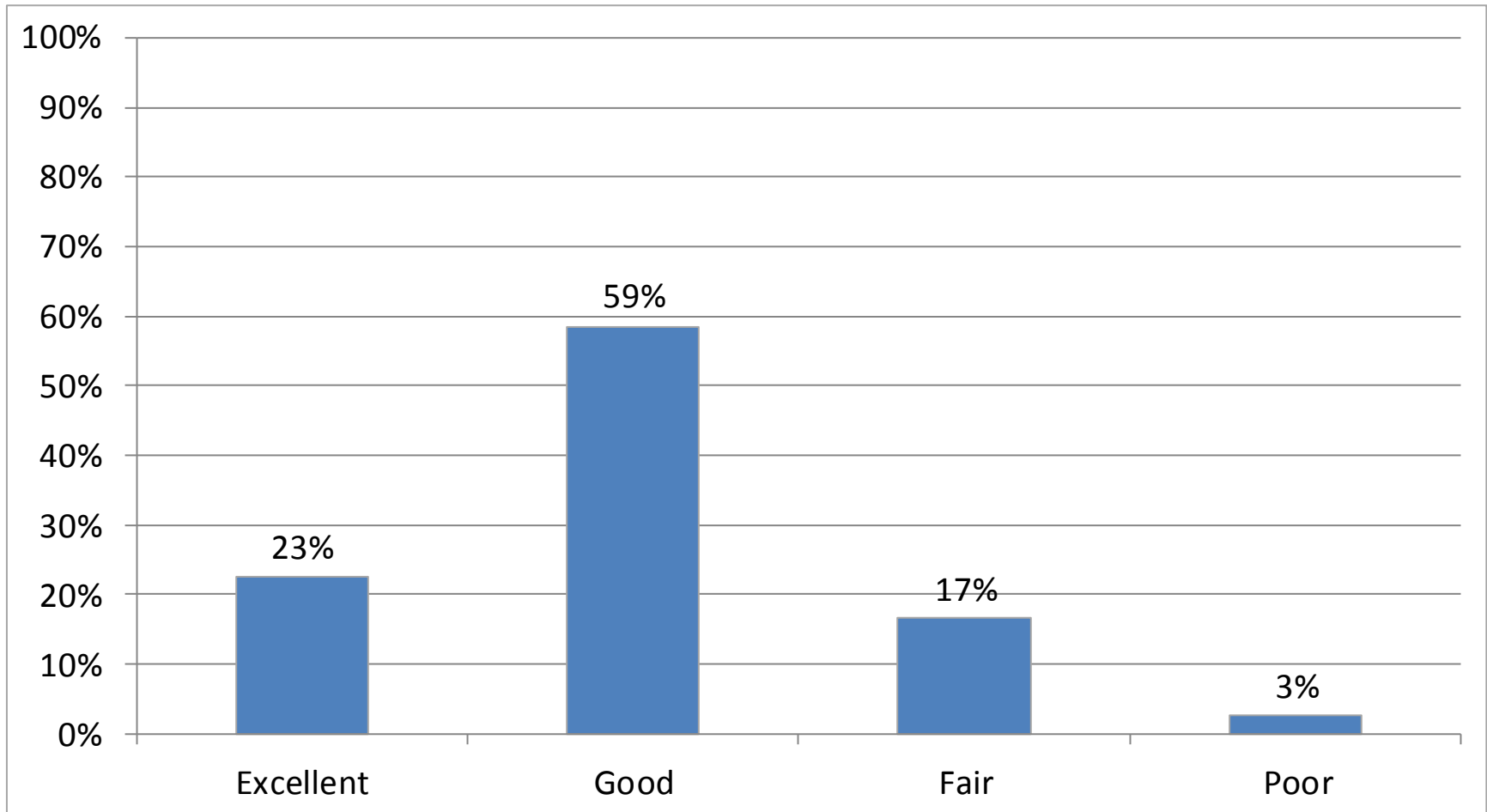
When asked if they had experienced any problems at the event, 94% of the respondents indicated that they did NOT experience any problems. This suggests that the general public were satisfied with the organisation and running of the event. The next slide lists the problems that were experienced by the 6% of the respondents.

Problems Experienced



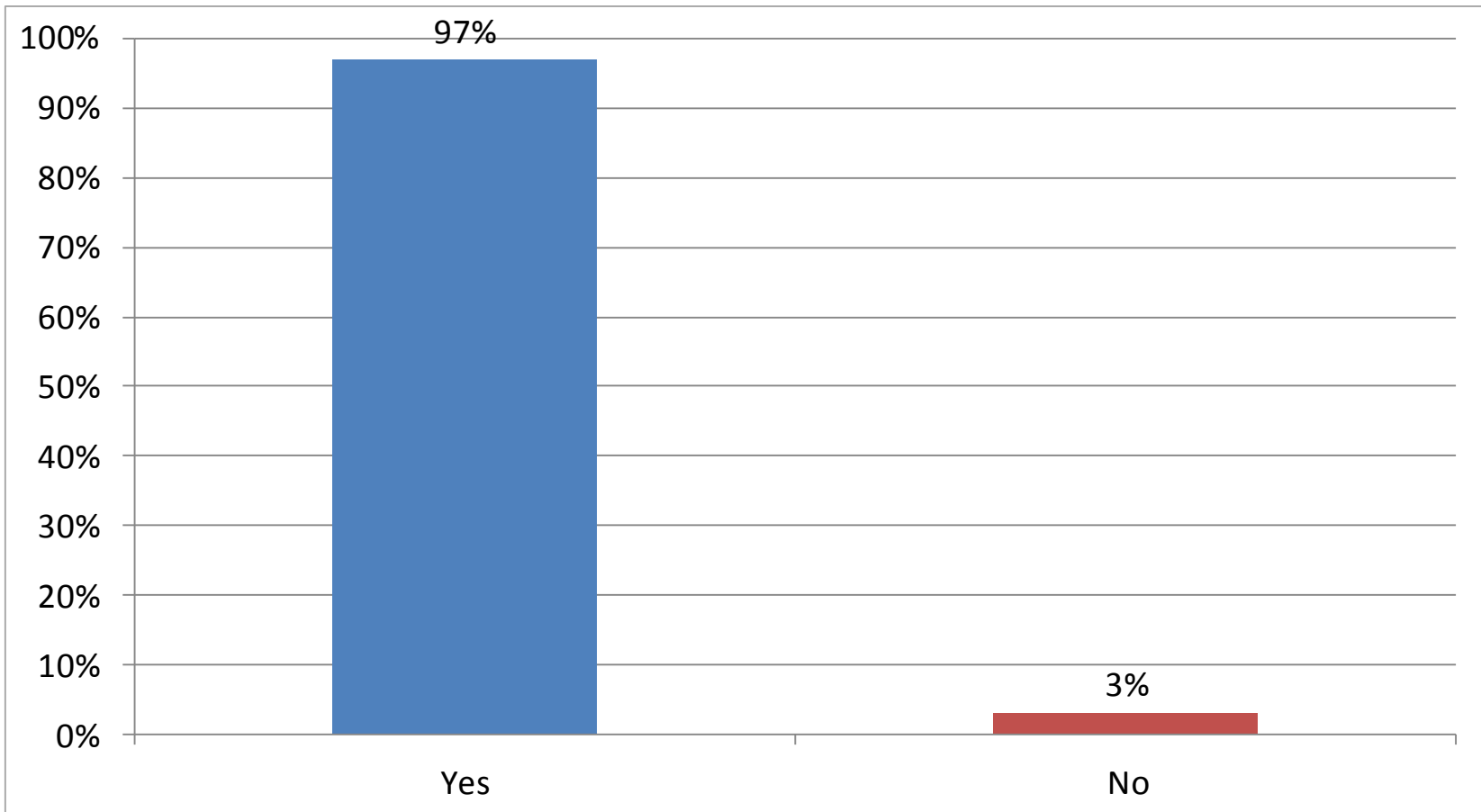
- Paraplegic facilities in the bathrooms
- Security refused to let people into parking area, even though there was space
- Security refused disabled people into paraplegic parking
- Not enough shaded areas to sit down and relax
- No toilet paper in the toilets
- Parking process was terrible
- People smoking in areas where they are not supposed to
- Security guards were rude and unhelpful
- Venue felt very cramped and crowded

Experience Rating



When asked if about their overall experience at the event, the majority of the respondents indicated that they had a “good” experience (59%). Overall, 82% of the respondents had a “good” or “excellent” experience at the event. This slide coincides with slide 21 and suggests that the majority of respondents feel that the event is well run.

Recommend the Event to Family & Friends?



The respondents were asked if they would recommend the event to their family and friends. A large majority of them indicated that they would (97% said yes). This shows that the respondents enjoyed the event enough to recommend it. It will be interesting to note the influence, “Word-of-Mouth”, at future events.

Reasons: Recommending the Event



Respondents said they would recommend the event for the following reasons:

- Beautiful setting and atmosphere
- An enjoyable day out with family and friends
- An enjoyable horse racing event
- Exciting event, “gets the heart racing”
- Good to get out, socialise and meet new people who enjoy horse tracing
- “A good way to make some money and have fun”

The negative responses pertained to:

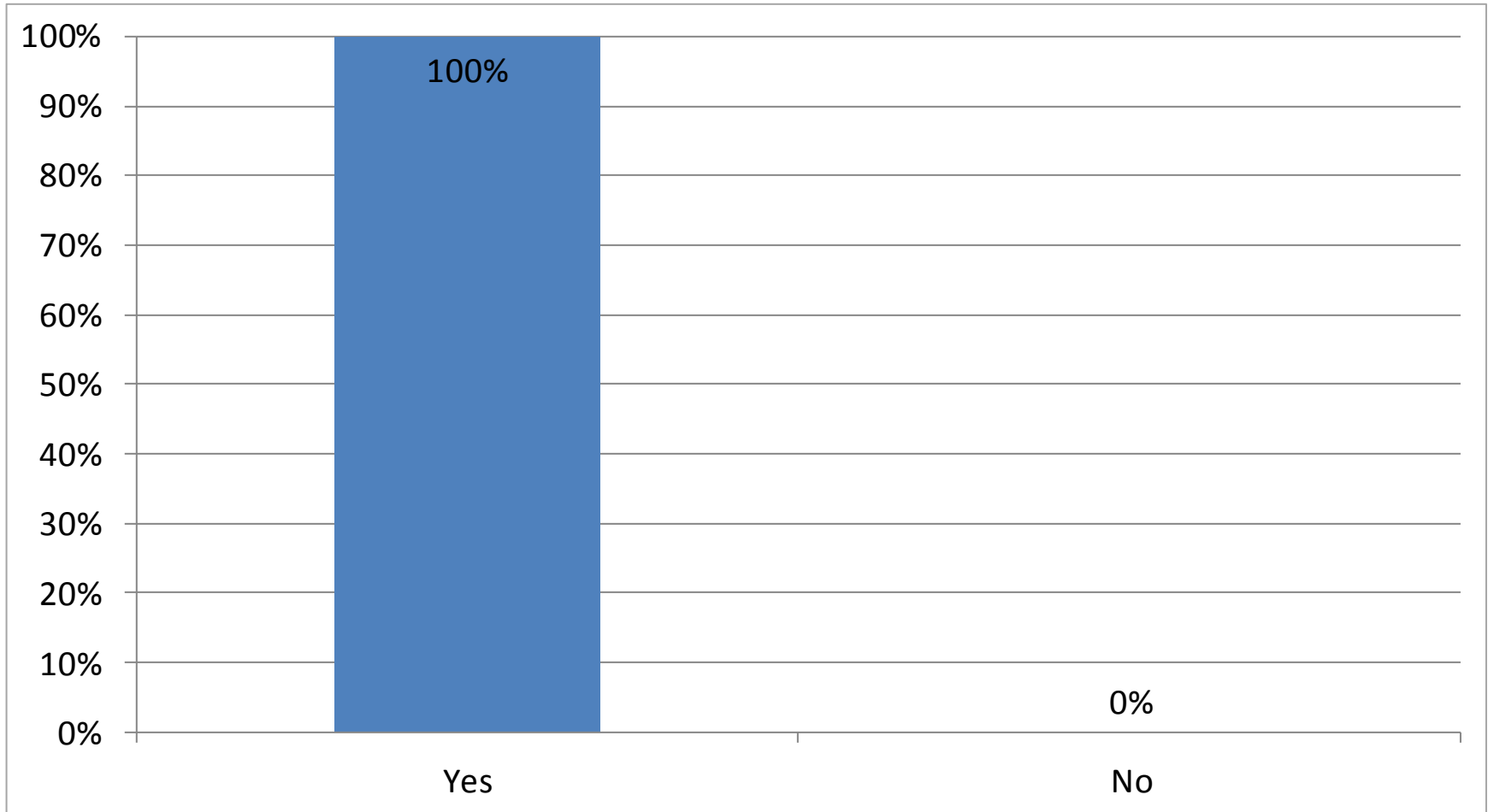
- ✓ lack of understanding about betting
- ✓ venue was very crowded
- ✓ not enough seating for the elderly

Event Improvement Suggestions



SUGGESTIONS
Better signage to advertise the event
Improved parking access
More seating areas, especially in the shade
More ablution facilities
Bring back the fashion show on the day of the races
More food stalls, to decrease the length of lines
Introduce different types of entertainment besides horse racing
Organize public transport for people without private vehicles
Improve the facilities for the disabled and elderly
Introduce a big screen for betting and watching the race (like Greyville)
Introduce a annual theme for the dress code

Recommend KZN?



The respondents were asked if they would recommend the province, KZN to their family and friends and 100% indicated that they would. This is an extremely positive finding not only for TKZN but also for the organizers as it shows that people will travel to the event as there is much more on offer outside of the event.

Reasons: Recommending KZN



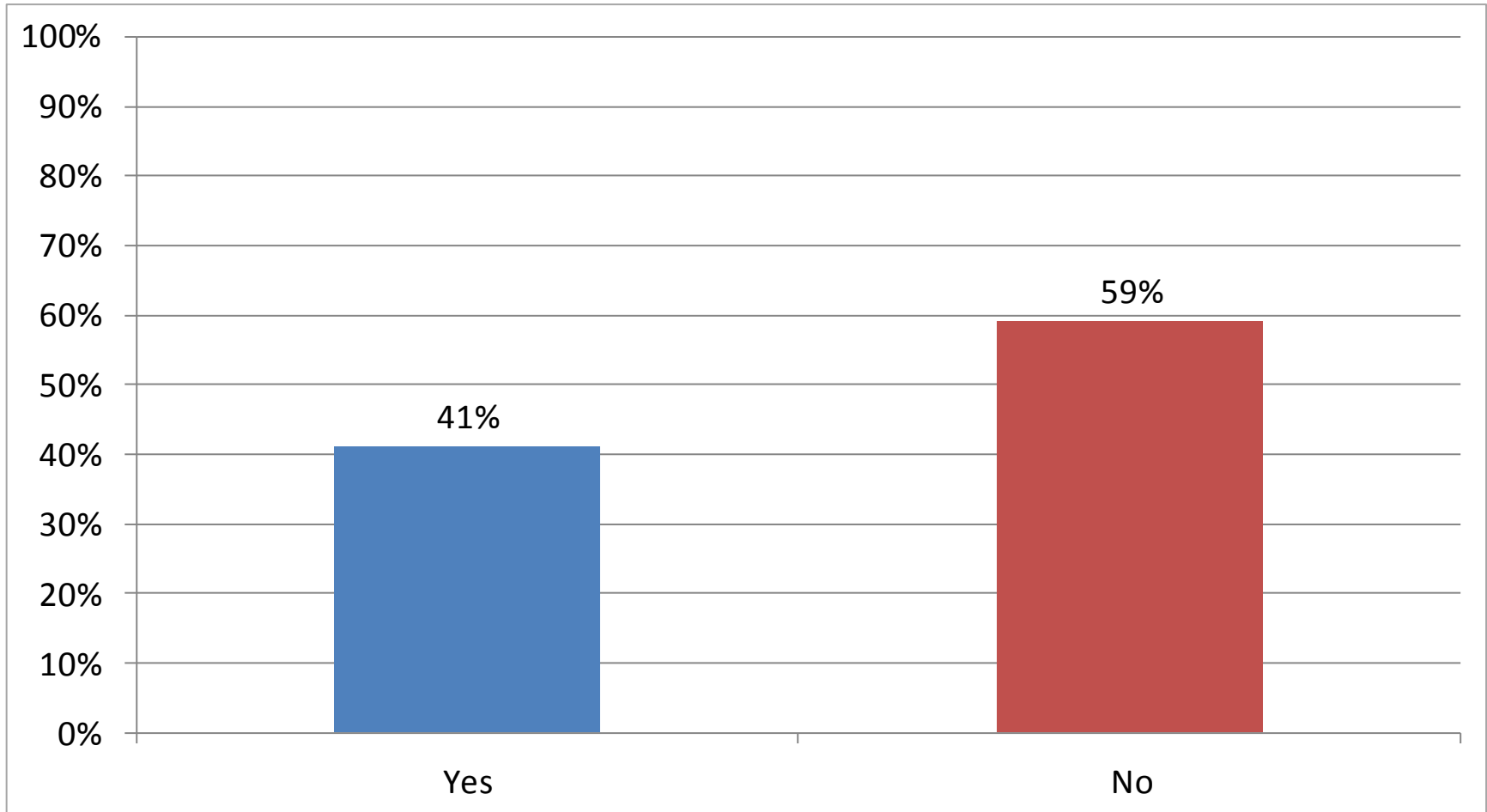
The respondents indicated they would recommend KZN for the following reasons:

- Friendly people
- Unique and beautiful province
- Beautiful cities
- Good weather
- The beach
- Variety of entertainment/attractions
- To have fun and relax
- Wildlife
- Wonderful place for a holiday

Some of the negatives that the respondents mentioned included:

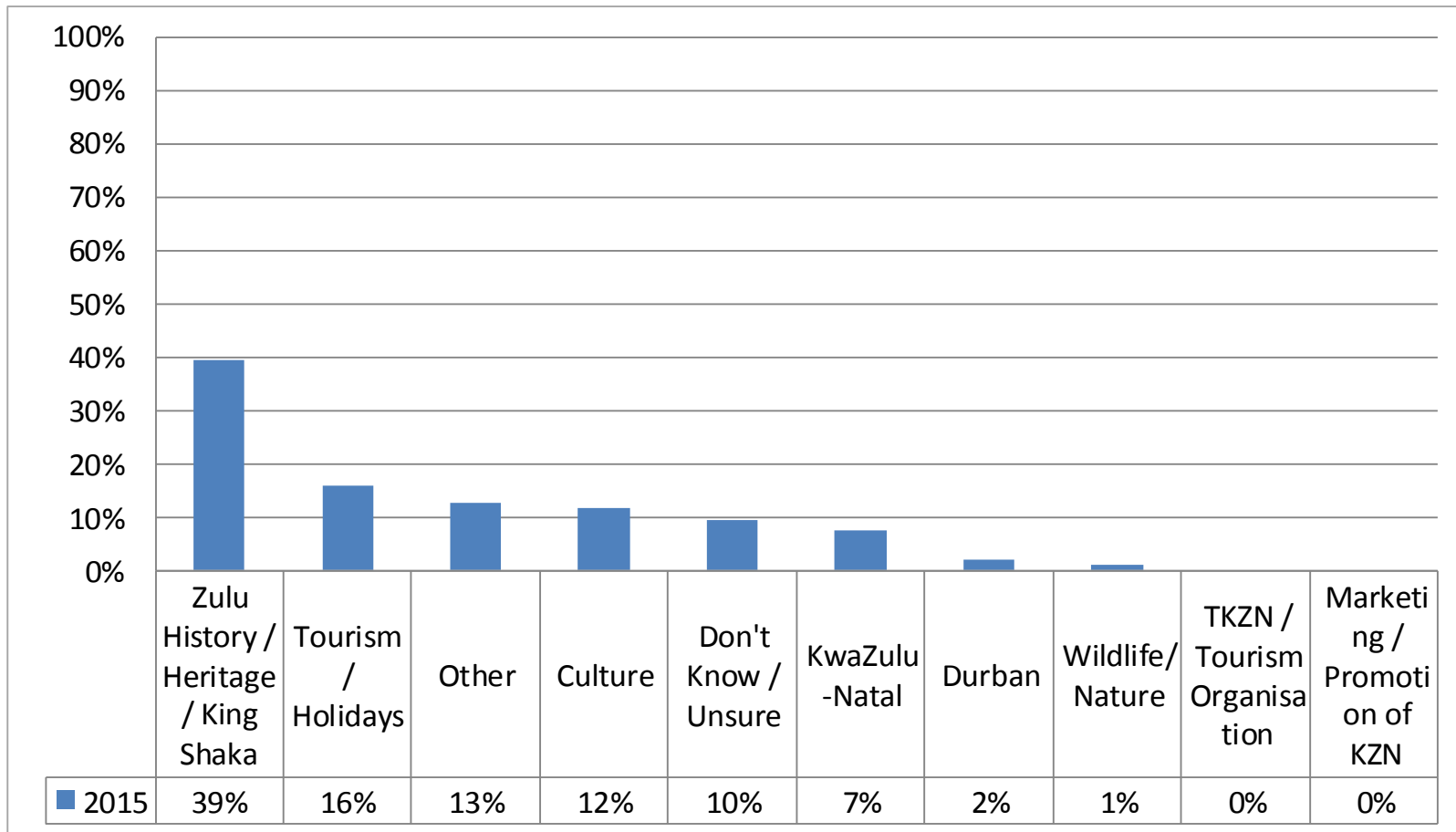
- High crime rates

Familiar with TKZN Slogan



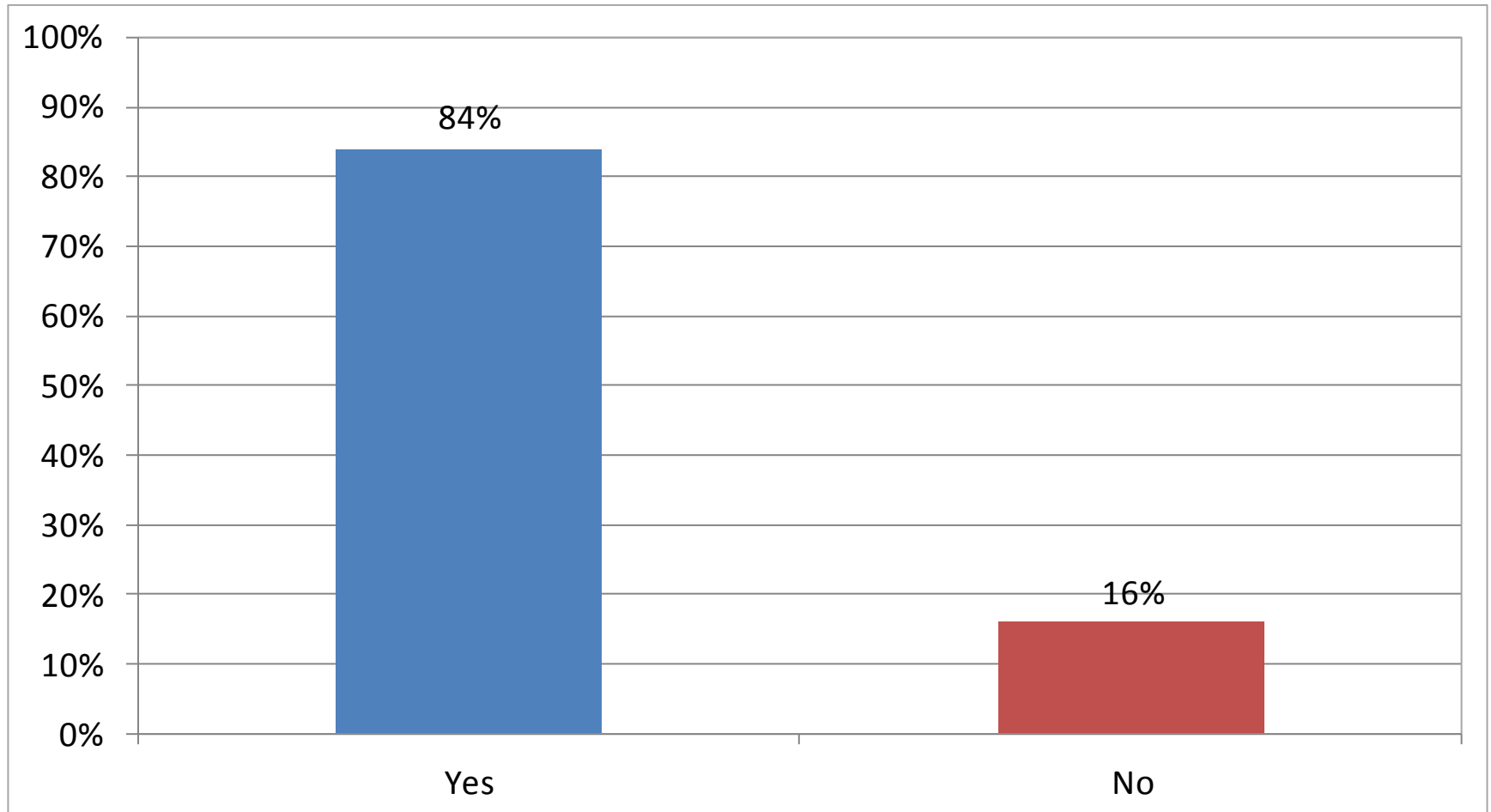
The respondents were asked if they were familiar with TKZN's slogan, "Zulu Kingdom. Exceptional.". The majority of the respondents (59%) indicated that they were NOT familiar with the slogan. This is a negative finding for TKZN as it is a reflection on our brand awareness, but it is also related to the change in the logo and slogan a few years ago.

Associations with TKZN Slogan



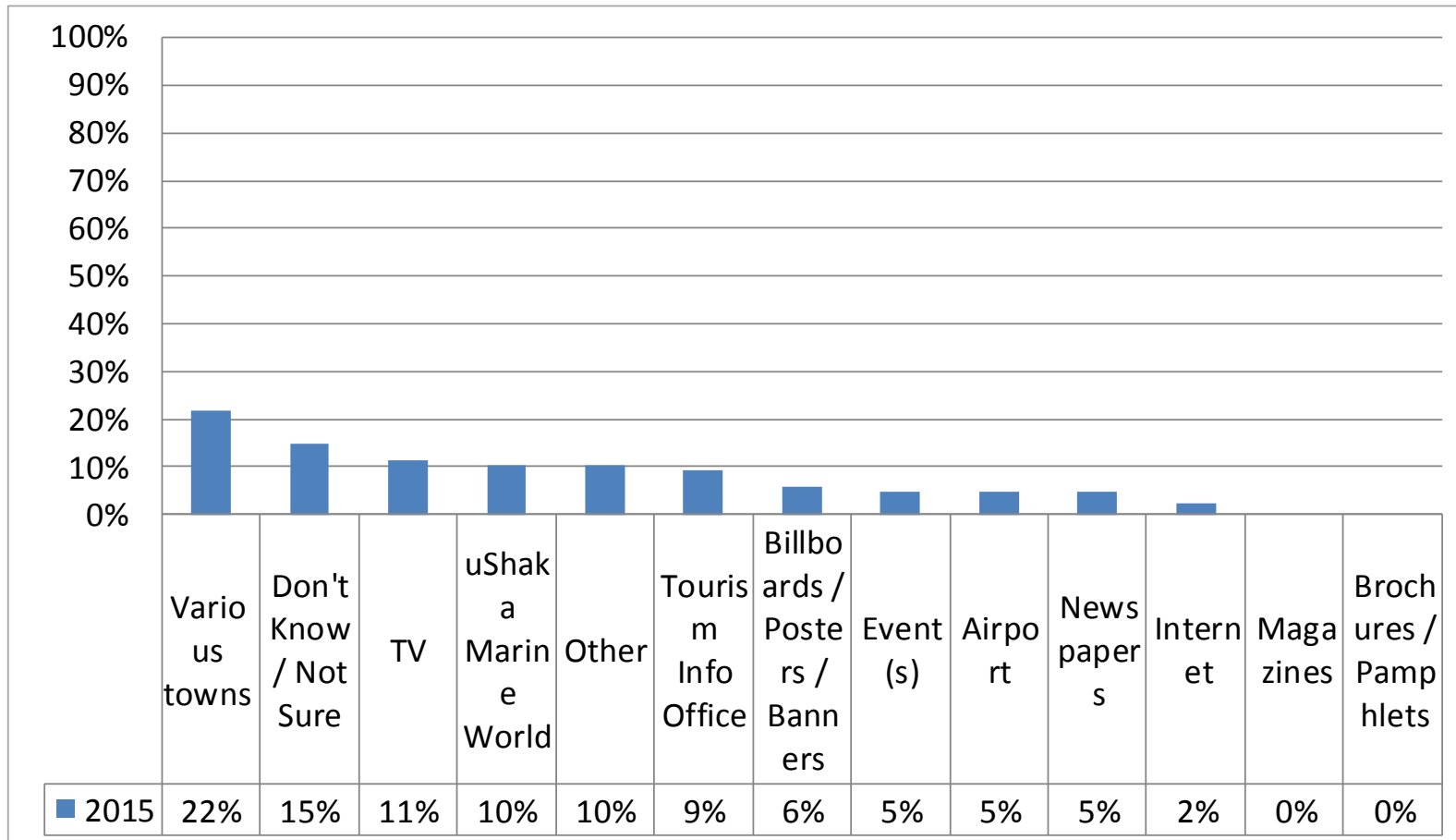
When asked about what they associate the slogan with, the majority of the respondents indicated that they think of, “Zulu History/Culture/Heritage/King Shaka”. It is negative to note that only 16% of them associate the slogan with “Tourism/Holidays”. It is important to note that “other” includes: uShaka Marine World, King Shaka Airport, Battlefields.

Noted TKZN Logo



The respondents were asked if they had noted the TKZN logo before and 84% said that they had. This is an extremely positive finding for TKZN as it shows that there is brand awareness for TKZN. Furthermore, this is often not the case as many events have revealed that respondents have NOT noted the logo.

Noting of TKZN Logo



When the respondents were asked where they had noted the TKZN logo, the majority (22%) of them indicated that they had seen it in various towns such as Howick, Pietermaritzburg and Durban. Following this, 15% of them indicated that they were not sure/don't know where they had seen it. "Other" indicates that respondents noted the logo at attractions such as Sibaya Casino as well as other random places across the province.

Spectator Estimate(s)



	2015
Spectator Estimate*	12 270
Avg. Group Size	3,5

*provided by the organizers.

The capacity of Scottsville racecourse was estimated, by Gold Circle, to be around 17 000. This is the maximum capacity and it includes the rooms (1 500), stands (3 000), grass area (2 000) and the in-field marquees (15 000) . The number for the marquees depends on how the space on the in-field area is utilized. Another problem with measuring the capacity of Scottsville racecourse is that that people alternate between the casino and the racecourse. This could prohibit the calculation of the total number of spectators.

Average Spend Breakdown



(Local Residents Only)	
Item	2015
Accommodation*	-
Transport	R86
Food & Beverage	R311
Bets	R966
Entertainment/Souvenirs	R389
Total Mean Spend	R1 161

*not applicable

Average Spend Breakdown (contd.)



(Visitors Only)	
Item	2015
Accommodation	R937
Transport	R619
Food & Beverage	R510
Bets	R2 143
Entertainment/Souvenirs	R535
Total Mean Spend	R2 661

Estimated Economic Impact Total Attendance



	2015	
	Local Residents	Visitors
Number	8 221	4 049
*Low Estimate	R 15 055 528	R 5 974 745
**Middle Estimate	R 21 878 465	R 10 775 563
***High Estimate	R 28 701 320	R 15 576 382

*Low estimate of margin of error of mean at 95% confidence level

**No Margin of Error

***High estimate of margin of error of mean at 95% confidence level

Estimated Economic Impact: Direct Spend*



	2015	
	Direct Spend	Multiplier of 2,0
*Low Estimate	R 5 974 745	R 11 949 490
***High Estimate	R 15 576 382	R 31 152 763

*Please note that the direct spend is equal to the **VISITOR's** spend only

Findings



1. The majority of the respondents were local residents (67%), while 33% were visitors.
2. Of these visitors, 77% were day visitors while only 23% were overnight visitors. In terms of overall spend at the event, it is necessary to attempt to increase the number of overnight visitors for future events.
3. As many of the spectators were local residents, it is not surprising that 95% of the respondents were from KZN. This was followed by Gauteng (3%), Mpumalanga (2%) and the Western Cape (1%).
4. In terms of demographics, the following can be said:
 - i. 25% of the respondents were between the ages 30-39, while 24% were between 18-29.
 - ii. 46% of the respondents were “Indian/Asia”, while 25% were “Black”
 - iii. 18% were “Administrator/Manager”, while 17% were “Professional”
 - iv. 17% fell into the income group(s), R5 001-R10 000 and R10 001-R15 000
5. A large proportion of the respondents (77%) did not stay overnight. However, in terms of the overnight visitors, the majority (11%) stayed for “More than 4 nights”. This is extremely positive for the overall economic impact of the event. Following this, 5% of the respondents stayed for 1 night only.

Findings (cont'd.)



6. Of these overnight visitors, 50% of them stayed with friends and family while 31% of them stayed in a “Family Hotel”. This was followed by “Luxury Hotel” (9%) and “B&B” (9%). It is important to note that staying with friends and family does not have a major economic impact on the event as there is less accommodation spend.
7. A large proportion of the respondents travelled to the area using private vehicles (82%) giving an indication that the majority of those from other provinces did not travel by airplane but instead drove to KZN. The “Mini-Bus Taxi” was also used by respondents with 11% of them indicating this. The fact that the vast majority of respondents were using private vehicles could possibly be the cause for the parking problems.
8. The event proved to be popular in the respondent’s social calendar as 38% of them were influenced to this year’s event by previous attendance. The event also seems to hold a good reputation as 22% of the respondents indicated that “Word-of-Mouth” had influenced them to attend.
9. 94% of the respondents were satisfied with information provided regarding the event. However, some respondents showed their dissatisfaction with the following:
 - i. Not enough information in other towns outside of PMB
 - ii. Starting times not well indicated
 - iii. Not enough information on the operations (parking) and betting

Findings (cont'd.)



10. Over 85% of all respondents said that they would attend the event again in the future, while only 3% said that they would NOT attend again. This suggests a general satisfaction with the event and its organization.
11. The event was also able to attract new attendees as 31% of the respondents said they were attending for the first time. When the visitors and residents were compared, it showed that 31% of the residents and 33% of the visitors had attended the event for the first time.
12. Some 82% of the respondents had either an “excellent” or a “good experience” at the event. This also suggests that the respondents were highly satisfied with the event.
13. Some of the respondents did experience problems at the event as shown by 6% of the respondents who experienced the following:
 - i. Parking issues/security guards not helpful
 - ii. Paraplegic facilities
 - iii. Not enough shaded areas
 - iv. Inadequate seating areas
 - v. Smoking in public areas
 - vi. Cramped and crowded venue

Findings (cont'd.)



14. Over 95% of the respondents said they would recommend the event to family and friends for the following reasons:
 - i. Great experience/atmosphere
 - ii. To network/socialise/meet new people
 - iii. Beautiful setting
 - iv. Exciting event
 - v. Good day out (with the family)

15. Respondents were asked to provide suggestions for improving the event. Some of the suggestions were:
 - i. Better signage
 - ii. More seating areas
 - iii. Improved parking access
 - iv. More entertainment
 - v. Fashion show
 - vi. Dress code/theme
 - vii. Big screen for spectators

Findings (cont'd.)



16. It is also extremely positive to note that 100% of the respondents said they would recommend KZN to family and friends. The following reasons were provided:
- i. Friendly people
 - ii. Good weather
 - iii. The beach
 - iv. Variety of entertainment/attractions
 - v. Wildlife
 - vi. Unique and beautiful province
17. In terms of TKZN's branding, only 41% of the respondents had noted the slogan, "Zulu Kingdom. Exceptional". 39% these respondents associated the slogan with "Zulu Kings/Culture/Heritage/King Shaka". Only 16% associated the slogan with "Tourism/Holidays".
18. In terms of the logo, over 80% of respondents were aware of it. This is an extremely positive finding for TKZN as this is generally not the case. The logo was mainly noted in various towns (22%), on TV (11%) and at uShaka Marine World (10%). 15% of the respondents, who had noted the logo, were not sure or could not remember where they had seen it. However, it is difficult to determine whether the respondents can distinguish between the SA Tourism logo and TKZN's logo – thus, this should be investigated.

Recommendations



The following recommendations are directed at the **organisers**:

1. The marketing and promotional activities for the event should be expanded into areas outside of Pietermaritzburg in order to increase the number of visitors (both day and overnight). The more awareness that is created for the event will bring a lot of positives as there will be more visitors and a higher direct spend. Furthermore, the event has shown that it has potential to attract visitors from outside of KZN and efforts should be made to increase these numbers.
2. There should be special packages that are arranged and offered to the horse racing fraternity. In other words, packages that include hotel specials and tours of the area could be arranged for the owners, trainers and jockeys of the horses as well as for their families. The horse racing fraternity are considered as “high income groups” and if these individuals feel encouraged to spend more time in the area then it is possible that they will. Thus, the direct spend should increase significantly.
3. The expansion of the venue/facilities should possibly be considered. Not only will this allow for a higher number of spectators, but it will also free up some space in order to avoid overcrowding and the “cramping of space”. It is important to consider all of the available space at the grounds for the crowds that come to the event. For example, the VIP marquee was a good example of how the crowds could be dispersed but still be a “part of the action”.

Recommendations (cont'd.)



The following recommendations are directed at the **organisers**:

4. A large selection of the respondents suggested certain aspects, for improving the event, that were inspired by other horse racing events such as the Vodacom Durban July and the J&B Met. However, some of these may work at Scottsville while others may not. For example:
 - i. It is possible to have other forms of entertainment, apart from the races, as there are areas in which to do so. The possibility of hosting an “after party” or an event that takes place after the races should therefore be considered. The reason for this is because it could possibly increase the amount of overnight visitors and thus, the direct spend at the event.
 - ii. In addition to the above, it is also possible to host a fashion show on the day of the races. By doing so, it has the potential of increasing the overall attendance at the event as the event becomes more than just horse racing. The designers and models would also increase the amount of visitors to the event as well as the overall spend.
 - iii. The suggestion of having a big screen at the event (such as the one at Greyville) is a possibility and it would be a good addition to the event’s profile. However, the decision for this lies in the hands of the various stakeholders involved.

Recommendations (cont'd.)



The following recommendations are directed at the **organisers**:

5. It is important that the food and beverage aspects receive some attention. Bearing that in mind, the catering infrastructure at Scottsville Racecourse (apart from the casino) are not on par with those at Greyville. Therefore, if the service at the food outlets is improved, along with a wider availability of food and drinks, then the spectators will start to spend more. When customers are unhappy with either the service, the quality of the food or the choices of meals, they will go somewhere else or bring their own. Even though the racecourse allows people to bring picnics, incentives should be introduced that will allow the spectators to want to buy food at the venue because it is more convenient or just generally better. For example, on race day, there could be specials on family lunch packs or picnic baskets that are already made.

Recommendations (cont'd.)



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

- 1) It is advised that TKZN's Marketing and PR teams find a way to partner with the organizers of this event as it has a potential to grow into a well-known event in KZN. Furthermore, if TKZN can boast both the Vodacom Durban July and the Tsogo Sun Sprint as two prestigious horse racing events in the province, this would essentially have very positive implications.
- 2) Once again, it is advised that TKZN work towards a branding strategy whereby the brand awareness of the organization is increased. This suggestion arose from the results relating to the noting of both the TKZN slogan and logo.
- 3) The research team should keep in contact with the organizing committee of the event and discuss the possibility of returning to the event in future to conduct more surveys. The reason for this is because results of previous years may then be compared and then trends will start to emerge. These trends are important as they will help to monitor the growth and reputation of the event.
- 4) The research team should conduct a separate and specific study on the branding, i.e. the slogan and logo of TKZN.