Tsogo Sun Amashova Durban Classic Event Impact Assessment: Top Line Summary Report

Richard Wyllie
Karen Kohler
Tourism KwaZulu-Natal
October 2016

Positive Highlights

- In 2016, there was a total of ±207 international participants.
- 59% of the respondents were visitors, which was a 19% increase from 2015. Furthermore, most of these visitors stayed for 2 nights or more.
- There was an increase in the number of entrants from Gauteng.
- 97% of the respondents were satisfied with the information provided by the organizers.
- 90% of the participant respondents said that they would attend the event again.
- 98% would recommend the event to family and friends.
- 90% of the respondents did not experience any problems at the event.
- The estimated economic impact of the event was between **R56,8 and R93,2 million.**

Methodology

Primary Data:

- **200** face-to-face interviews were conducted with respondents randomly selected on the day of the race at the finishing point (Suncoast Casino, Durban).
- The interviews were conducted using a structured questionnaire.
- The international best practice of representative sampling was used (see the next slide).

Secondary Data:

- Provided by the organizers of the event.

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.

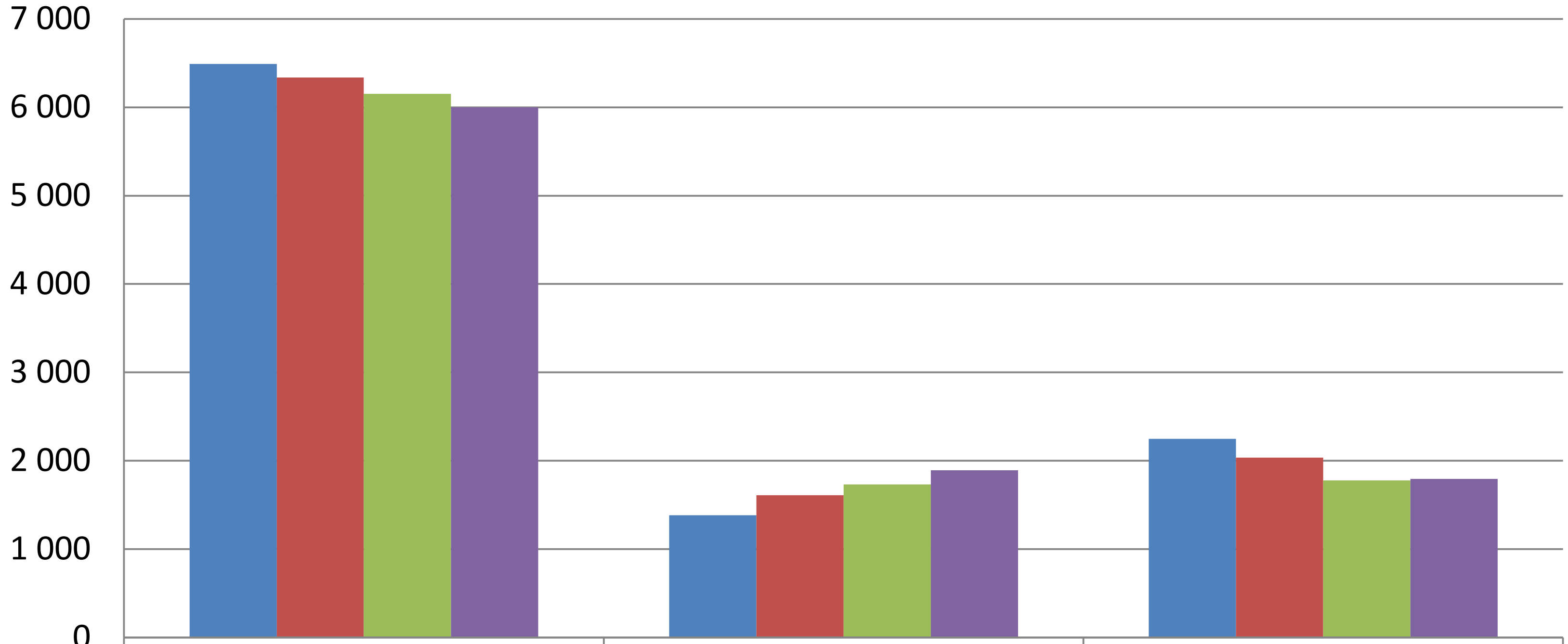
i.e. If the sample size grows to more than 400 (in relation to the population), any addition to the sample size **becomes statistically irrelevant**.

Entrants

Event	2013	2014	2015	2016
106km	6 492	6 337	6 154	5 999
65km	1 383	1 610	1 731	1 891
35km	2 249	2 035	1 776	1 795
Total Participants	10 124	9 982	**10 022**	**9 685**
		-1,4%	**0,4%↑**	**-3,4%**

Note: the total participants in 2016 for the 106km, 65km and 35km is 9 685. This figure includes both domestic and international participants.

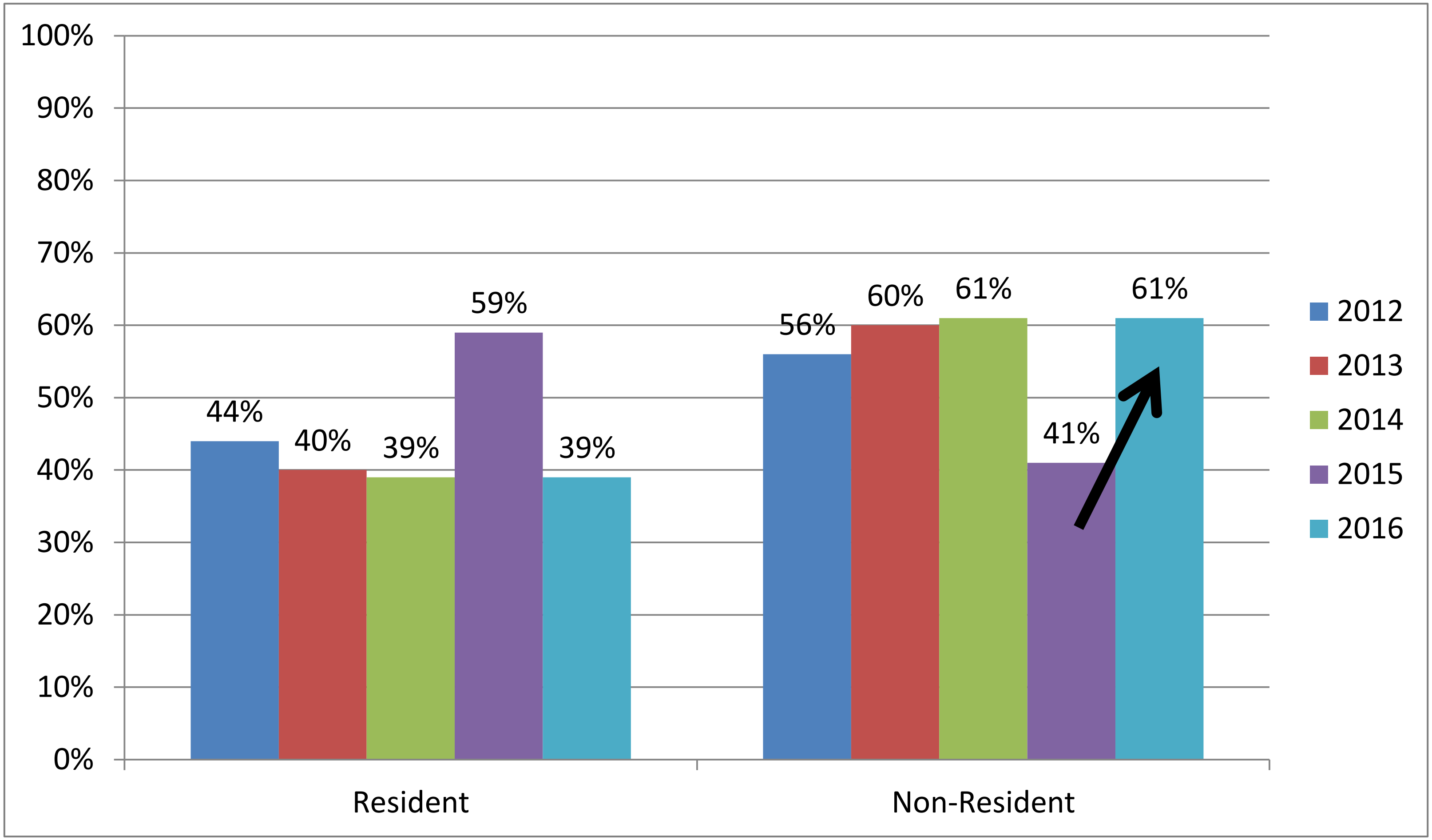
Entrants (cont'd)



	106km	65km	35km
2013	6 492	1 383	2 249
2014	6 337	1 610	2 035
2015	6 154	1 731	1 776
2016	5 999	1 891	1 795

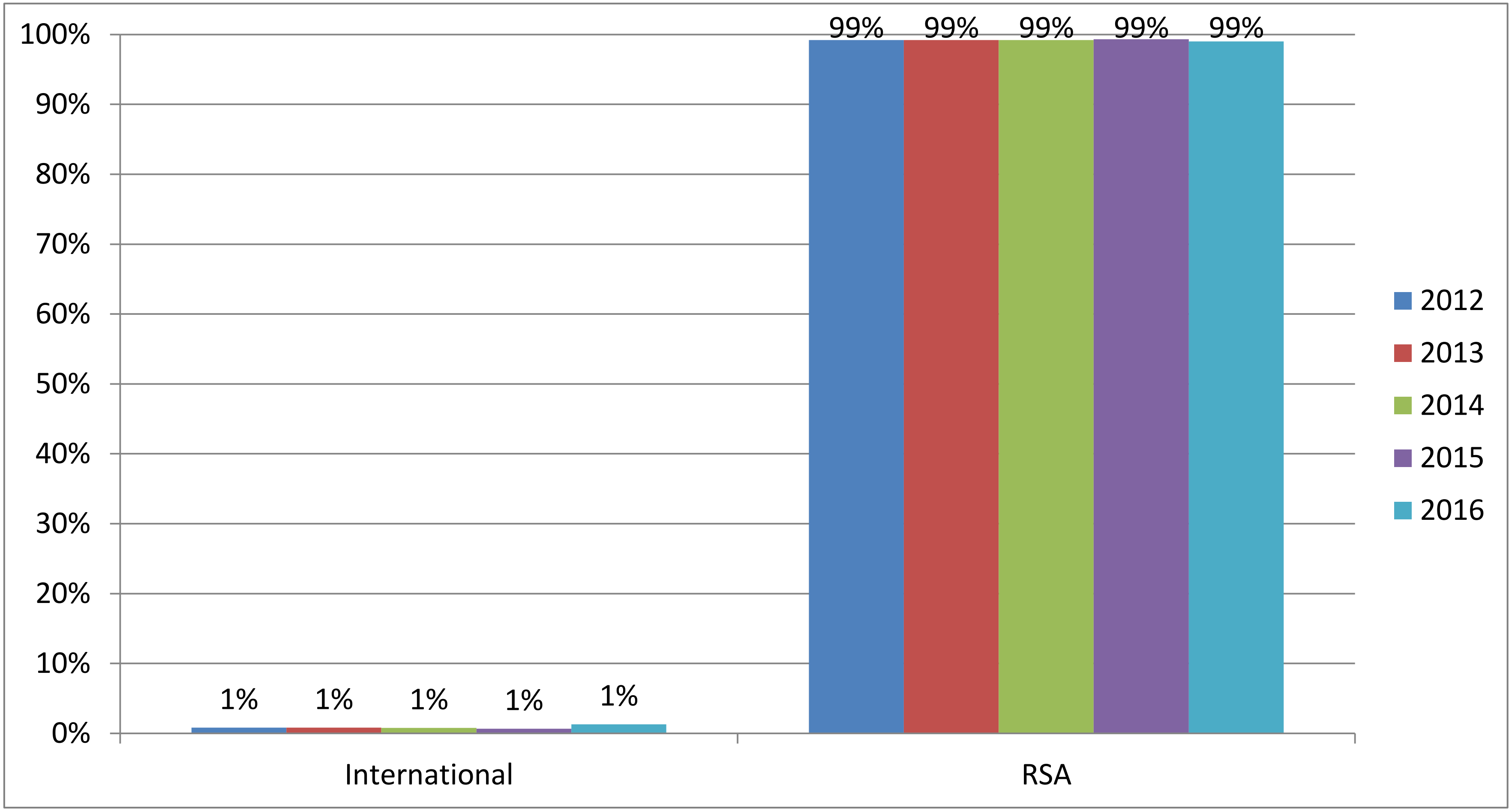
The 106km race continued to be the most popular with just over 60% of the entrants taking part in it. However, the numbers have steadily declined since 2013 with the 65km growing steadily in the same period.

Nature of Participant Respondents: Resident vs Non-Resident



The graph above shows an increase in the number of non-resident participants along with a decrease in the number of resident participants. This may have a positive influence on the economic impact of the event.

Participants:
RSA vs International



The race continues to be dominated by South African participants.

International Entrants

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Total	**22**	**38**	**21**	**21**	**8**	**53**	**78**	**77**	**64**	**207**

The number of international entrants had **increased** in 2016. This is extremely positive in terms of the global appeal and growth of the event.

International Countries in 2016

Country	Percentage	Count
Angola	0,02	2
Australia	0,05	5
Belgium	0,06	6
Botswana	0,2	19
Canada	0,02	2
Czech Republic	0,02	2
Germany	0,04	4
Ireland	0,02	2
Mauritius	0,1	10
Mozambique	0,07	7
Namibia	0,23	22
Seychelles	0,02	2
Swaziland	0,6	58
UAE	0,2	19
United Kingdom	0,3	29
USA	0,05	5
Zambia	0,09	9
Zimbabwe	0,04	4
TOTAL	**-**	**207**

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

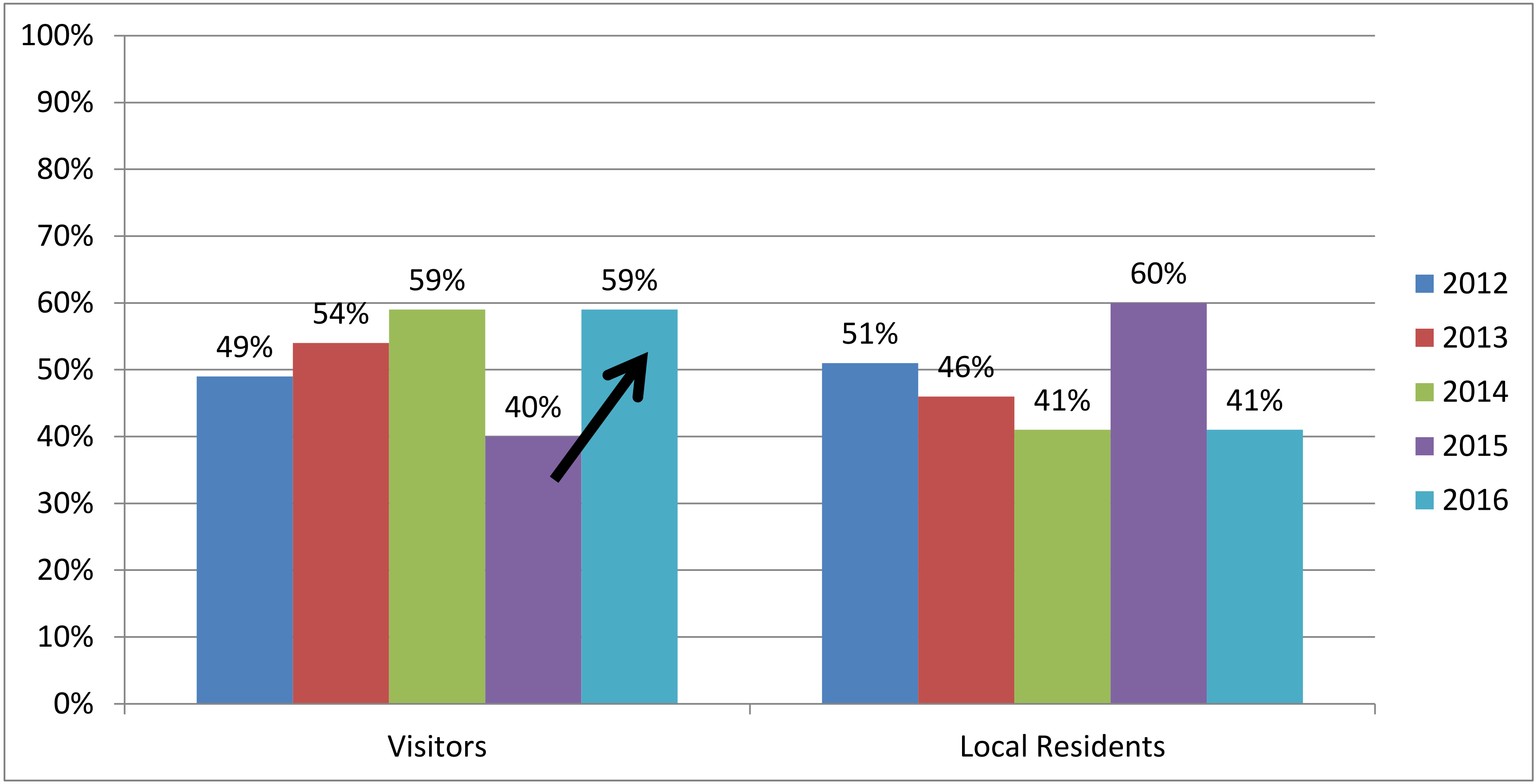
Entrants: SA by Province

Province	2012	2013	2014	2015	2016
Gauteng	2 680	2 904	3 128	2 806	3 358
KZN	5 887	6 456	6 055	5 590	5 551
Free State	125	97	123	163	124
Eastern Cape	116	67	80	127	69
Limpopo	72	24	-	18	60
North West	90	122	79	185	120
Mpumalanga	113	200	213	325	180
Western Cape	201	143	204	363	195
N. Cape	28	14	14	0	0
Total	**9 312**	**10 027**	**9 896**	**9 577**	**9 657**

KZN still has the highest number of entrants followed by Gauteng. The number of entrants from Gauteng had increased in 2016, while the numbers from KZN decreased slightly. There was a decrease in the number of entrants from all of the other provinces.

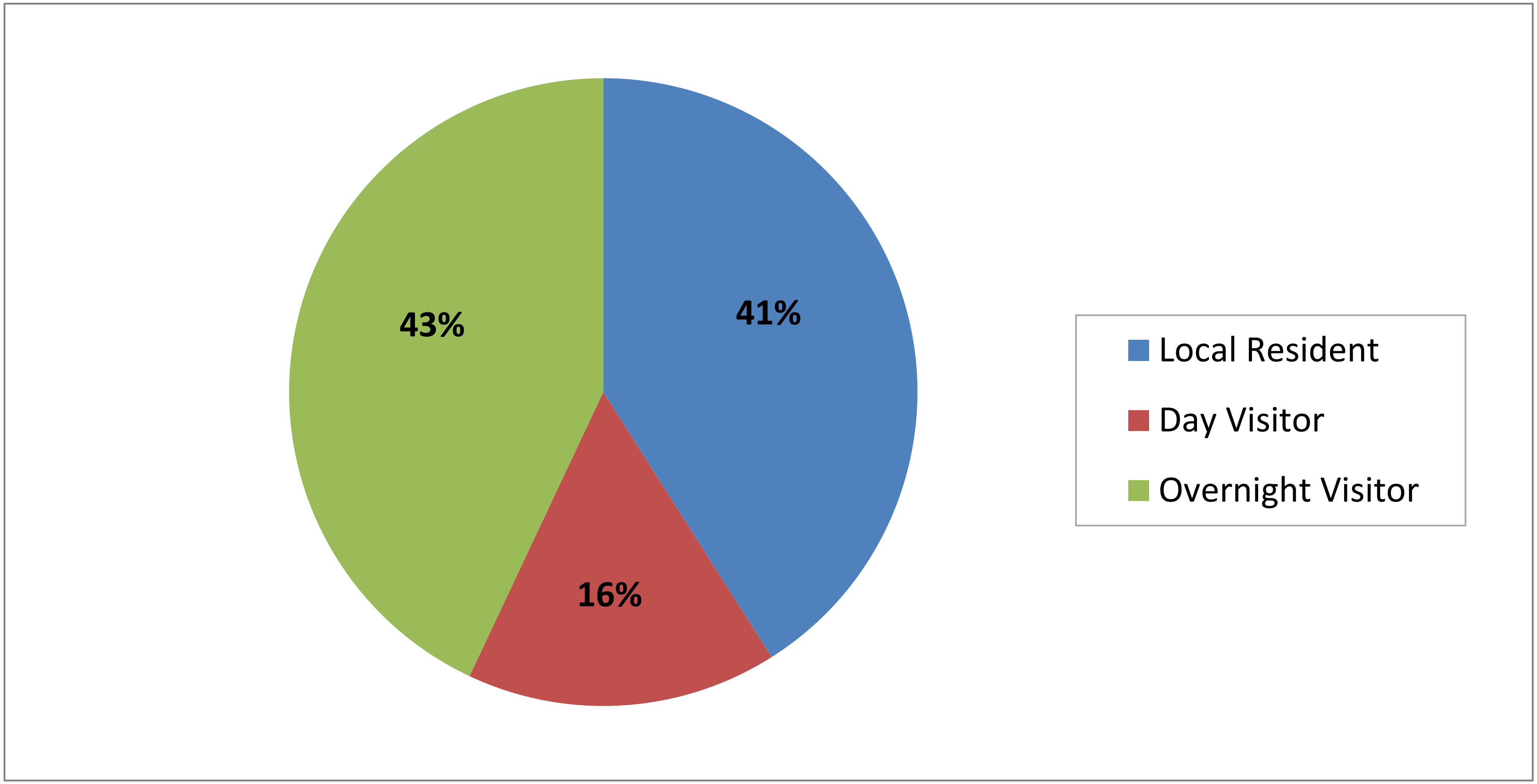
Source: Race Organisers

Domestic Respondents
Local Residents vs Visitors



When comparing 2015 and 2016, there was a 19% increase in the number of respondents who were visitors, and this occurred alongside a decline in the number of respondents who were local residents. Once again, this finding should have a positive influence on the value of the event.

Domestic Respondents (2016) Local Residents vs Visitors (cont'd.)



In 2016, it was noted that 43% of the respondents were overnight visitors, while 16% were day visitors. It is important to maintain a high number of overnight visitors as they tend to have a higher average spend, and thus have a positive impact on the value of the event.

Nature of Respondents: Breakdown

2015	Sample	%	Total Attendance*
Local Residents	138	60	7 501
Day Visitors	32	14	1 750
Overnight Visitors	60	26	3 251
TOTAL	**230**	**100**	**12 502**

2016	Sample	%	Total Attendance*
Local Residents	82	41	5 201
Day Visitors	32	16	2 030
Overnight Visitors	86	43	5 454
TOTAL	**200**	**100**	**12 685**

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 in 2016 was estimated to be **12 685**. This is based on the total number of participants (9 685) in addition to the estimated number of spectators being 3 000.

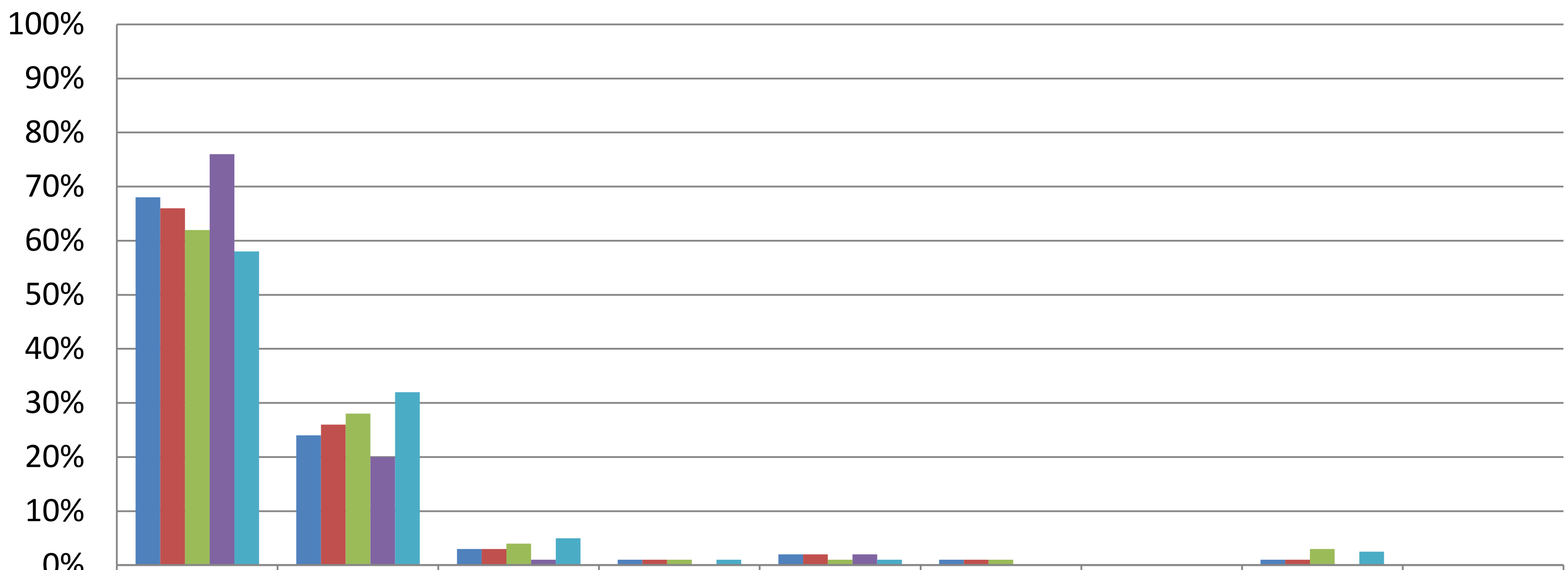
Average Group Size

2010	2011	2012	2013	2014	2015	**2016**
2.9	2.8	3.4	3.5	3.2	2.8	2.9

Note: A group refers to a respondent and his/her non-cyclist friends, spouse and children attending the event. It does not include other cyclists.

When comparing 2015 and 2016 it was evident that there was slight increase in the average group size. This could possibly be attributed to the fact that there was an increase in the number of visitors that attended the event. It is quite common for visitors to travel with their families or in a group of friends, whereas local residents are more likely to travel with one family member or “supporter”.

Domestic Respondents: Province of Origin (All)



	KZN	Gauteng	WC	EC	FS	NW	Lim	Mpum	NC
2012	68%	24%	3%	1%	2%	1%	0%	1%	0%
2013	66%	26%	3%	1%	2%	1%	0%	1%	0%
2014	62%	28%	4%	1%	1%	1%	0%	3%	0%
2015	76%	20%	1%	0%	2%	0%	0%	0%	0%
2016	58%	32%	5%	1%	1%	0%	0%	3%	0%

It is evident that people from KZN still dominate the event. However, when compared to previous years, the number of respondents from KZN decreased by 18%, while the respondents from Gauteng had increased by 12% and those from the W Cape had increased by 4%. The remaining provinces were poorly represented.

Total Average Spend

Year	**Low Estimate	*Middle Estimate	***High Estimate
2008	R1 315	R1 554	R1 794
2009	R770	R968	R1 167
2010	R1 350	R1 685	R2 019
2011	R1 324	R1 729	R2 133
2012	R1 627	R2 071	R2 515
2013	R1 490	R1 858	R2 226
2014	R2 101	R2 729	R3 357
2015	R2 410	R3 467	R4 524
2016	R2 501	R3 108	R3 715

* No margin of error of mean
**Low estimate of margin of error of mean at 95% confidence level
***High estimate of margin of error of mean at 95% confidence level

The average mean spend of the respondents was higher in 2015 than in 2016. However, the difference is quite small in the larger scheme of things. The slight decline could be attributed to the decreased spend due to a depressed local economy. There is never an absolute reason for the decrease in spend.

Breakdown of Non-Resident Spend

Item	2011	2012	2013	2014	2015	2016
Accommodation	R1 911	R2 645	R2 102	R2 898	R2 570	**R2 454**
Transport	R1 055	R1 358	R1 115	R2 062	R1 351	**R1 613**
Food and Beverages	R729	R942	R777	R1 060	R730	**R1 185**
Entertainment	R595	R745	R870	R715	R700	**R138**
Souvenirs/Other	R756	R900	R594	R866	R558	**R153**

When comparing 2015 and 2016, it was noted that the average spend by non-residents decreased across the categories **accommodation** (slight), **entertainment**, and **souvenirs/other spend**. Yet there were increases in the categories **transport** and **food and beverages**. The data shows that the respondents spent money only on crucial elements of the trip such as food and accommodation – this is evident from the decrease in entertainment and other spend. The increase in the transport and food spend can be attributed to the rise in petrol prices and food prices (drought). The slight decrease in the accommodation spend is not significant.

Estimated Economic Impact: Resident Participants

* No margin of error of mean
**Low estimate of margin of error of mean at 95% confidence level
***High estimate of margin of error of mean at 95% confidence level

Registration fees are not included to avoid double counting.

Year	Number	Margin of Error	Mean	Spend
2011	4 368	*Low estimate **Middle Estimate ***High Estimate	R260 R215 R305	R1 134 713 R937 005 R1 332 421
2012	2 821	*Low estimate **Middle Estimate ***High Estimate	R244 R352 R460	R688 275 R993 107 R1 297 940
2013	4 657	*Low estimate **Middle Estimate ***High Estimate	R300 R444 R588	R1 401 368 R2 071 752 R2 742 135
2014	6 055	*Low estimate **Middle Estimate ***High Estimate	R181 R395 R608	R1 095 962 R2 389 832 R3 683 703
2015	5 913	*Low estimate **Middle Estimate ***High Estimate	R441 R790 R1 140	R2 607 633 R4 671 270 R6 740 820
2016	3 777	*Low estimate **Middle Estimate ***High Estimate	R324 R485 R647	R1 223 797 R1 831 918 R2 443 816

Estimated Economic Impact: Non-Resident Participants

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

* No margin of error of mean
**Low estimate of margin of error of mean at 95% confidence level
***High estimate of margin of error of mean at 95% confidence level

The increased spend of non resident spending is due to the higher number of non-resident participants.

Year	Number	Margin of Error	Mean	Spend
2011	4 196	*Low estimate **Middle Estimate ***High Estimate	R3 089 R2 061 R4 117	R12 960 877 R8 647 189 R17 274 566
2012	3 590	*Low estimate **Middle Estimate ***High Estimate	R3 129 R4 127 R5 125	R11 233 110 R14 814 443 R18 398 750
2013	6 479	*Low estimate **Middle Estimate ***High Estimate	R2 472 R3 136 R3 560	R16 019 462 R20 321 195 R23 068 305
2014	3 841	*Low estimate **Middle Estimate ***High Estimate	R3 144 R4 151 R5 158	R12 076 586 R15 944 786 R19 812 985
2015	4 109	*Low estimate **Middle Estimate ***High Estimate	R3 225 R4 387 R5 549	R13 251 525 R18 026 183 R22 800 841
2016	5 908	*Low estimate **Middle Estimate ***High Estimate	R4 230 R5 228 R6 226	R24 990 206 R30 886 240 R36 782 274

Estimated Economic Impact: Resident Spectators

South Africa KWAZULU-NATAL Zulu Kingdom. Exceptional

* No margin of error of mean
** Low estimate of margin of error of mean at 95% confidence level
*** High estimate of margin of error of mean at 95% confidence level

These are based on the estimated number of spectators at the finishing point as observed by the research team – i.e. 3000 spectators in total, of which 47% were local residents.

Year	Number	Margin of Error	Mean	Spend
2011	1 060	*Low estimate **Middle Estimate ***High Estimate	R234 R193 R275	R247 828 R204 258 R291 398
2012	1 550	*Low estimate **Middle Estimate ***High Estimate	R269 R444 R618	R417 446 R687 813 R958 179
2013	1 380	*Low estimate **Middle Estimate ***High Estimate	R248 R486 R724	R342 455 R671 319 R1 000 183
2014	1 725	*Low estimate **Middle Estimate ***High Estimate	R155 R231 R307	R267 691 R399 337 R530 983
2015	1 850	*Low estimate **Middle Estimate ***High Estimate	R208 R496 R783	R384 800 R917 600 R1 448 550
2016	1 410	*Low estimate **Middle Estimate ***High Estimate	R201 R300 R399	R283 410 R423 000 R562 590

Estimated Economic Impact: Non-Resident Spectators

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

* No margin of error of mean
**Low estimate of margin of error of mean at 95% confidence level
***High estimate of margin of error of mean at 95% confidence level

These are based on the estimated number of spectators at the finishing point as observed by the research team – i.e. 3000 spectators in total, of which 53% were visitors.

Year	Number	Margin of Error	Mean	Spend
2011	940	*Low estimate **Middle Estimate ***High Estimate	R2 110 R1 438 R2 782	R1 983 118 R1 352 015 R2 614 221
2012	760	*Low estimate **Middle Estimate ***High Estimate	R2 005 R3 171 R4 337	R1 523 689 R2 410 076 R3 296 464
2013	1 620	*Low estimate **Middle Estimate ***High Estimate	R1 433 R2 496 R3 560	R2 322 131 R4 045 049 R5 767 966
2014	1275	*Low estimate **Middle Estimate ***High Estimate	R2 449 R4 148 R5 487	R3 123 474 R5 289 713 R7 455 953
2015	1 350	*Low estimate **Middle Estimate ***High Estimate	R1 756 R4 025 R6 294	R2 370 600 R5 433 750 R8 496 900
2016	1 590	*Low estimate **Middle Estimate ***High Estimate	R2 170 R4 183 R6 196	R3 450 300 R6 650 970 R9 851 640

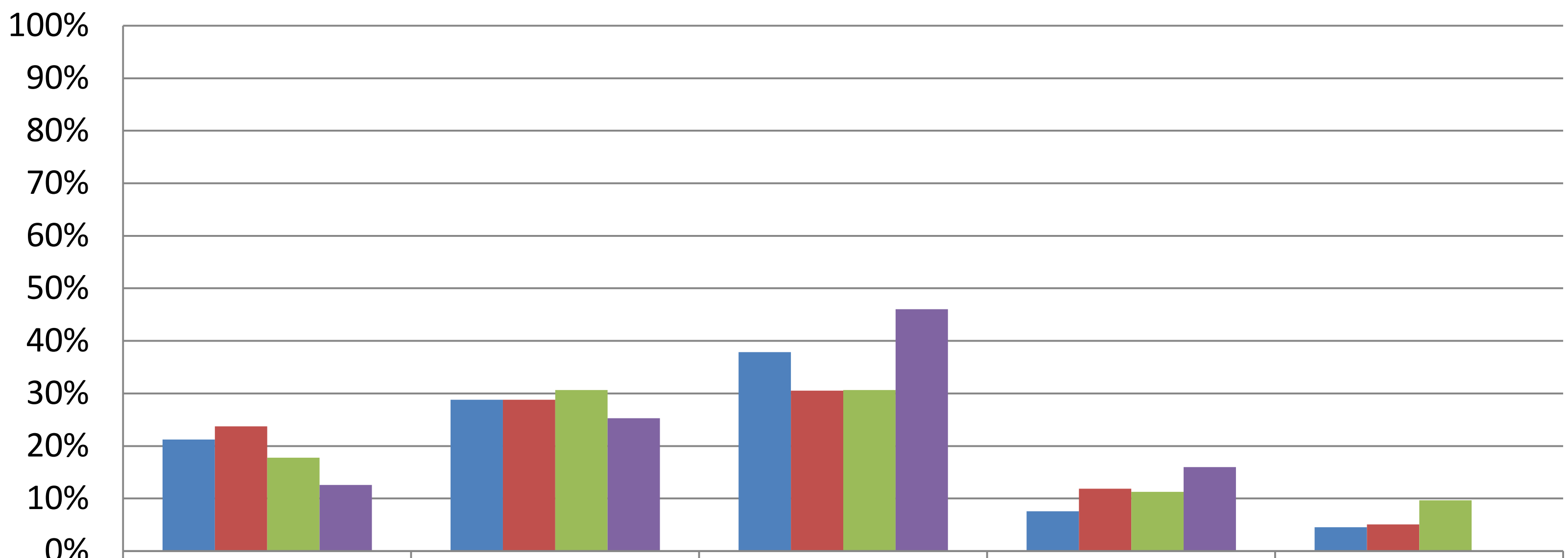
Estimated Total Economic Impact: Non-Residents Participants and Spectators

	2014	2015	2016
***Direct Spend**	Between R15 200 060 and R27 268 938	Between R15 622 125 and R31 297 741	BetweenR28 440 506 and R46 633 914
Total Spend	**Between R30 400 121 and R54 537 877	**Between R31 324 250 and R62 595 482	****Between R56 881 011 and R93 267 828**

** Multiplier of 2

Note: The direct spend was calculated by using the non-resident spend only. Only 75% of the organizers' spend was considered to be spent in KZN. This accounts for spend that leaves the province, such as prize money and time keeping equipment. The number of participants had decreased but because the spend had no significant changes, the economic value of the event is thus estimated to have increased in 2016. Another reason behind the increase in the economic impact of the event is due to the increase in the number of visitors. As the economic impact is calculated by using the visitor's spend, it is therefore expected that the increase of visitors would increase the economic value of the event.

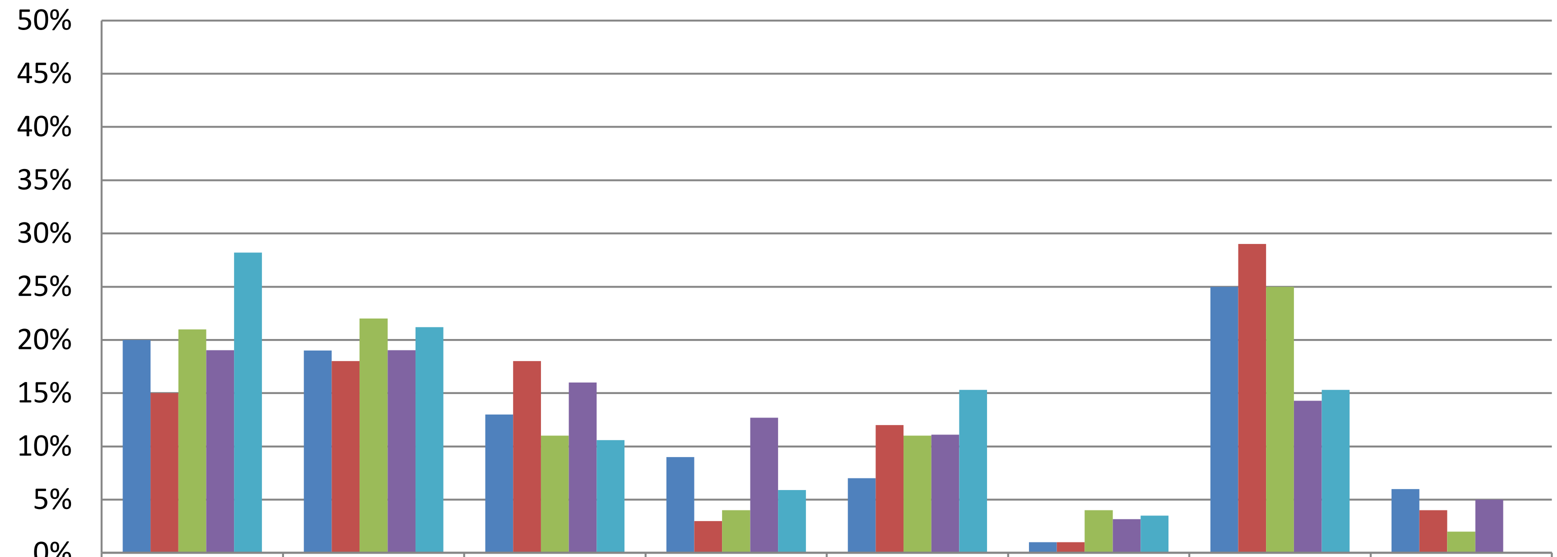
Length of Stay: Overnight Visitors



	1 Night	2 Nights	3 Nights	4 Nights	>4 Nights
2013	21%	29%	38%	8%	5%
2014	24%	29%	31%	12%	5%
2015	18%	31%	31%	11%	10%
2016	13%	25%	46%	16%	0%

The general trend in 2016 was that the majority of the respondents stayed for the weekend of the event – i.e. 46% stayed for **3 nights** and 25% stayed for **2 nights**. There was a 15% increase in the number of people who stayed for **3 nights** as well as those who stayed for **4 nights**. It is positive to see that the length of stay is increasing as this could influence the value of the event in a positive manner.

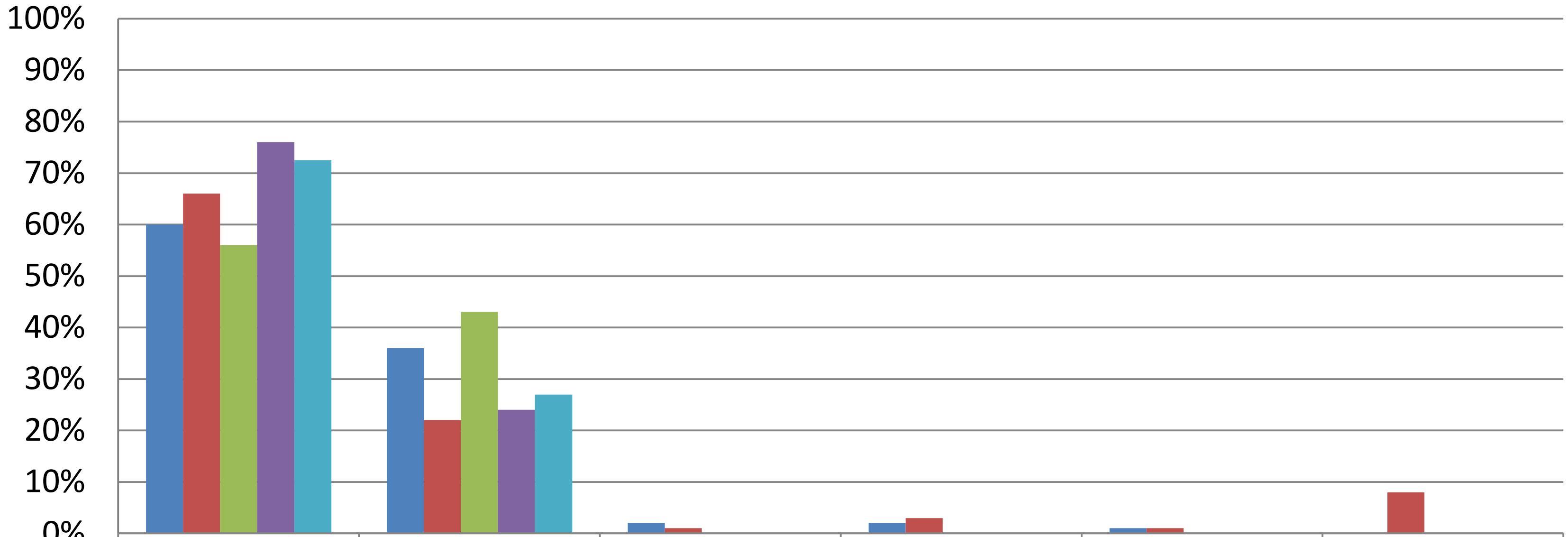
Accommodation Overnight Visitors



	Luxury Hotel	Family Hotel	B&B/Guest House	Holiday Flat	Self-Catering	Holiday Home	Friends/Family	Other
2012	20%	19%	13%	9%	7%	1%	25%	6%
2013	15%	18%	18%	3%	12%	1%	29%	4%
2014	21%	22%	11%	4%	11%	4%	25%	2%
2015	19%	19%	16%	13%	11%	3%	14%	5%
2016	28%	21%	11%	6%	15%	4%	15%	0%

It was noted that 49% of the respondents stayed in either a **Luxury Hotel** (28%) or in a **Family Hotel** (21%). When comparing 2015 and 2016, there was an increase in the numbers who stayed in Luxury Hotels, Family Hotels, Self-Catering Units, and with Friends/Family.

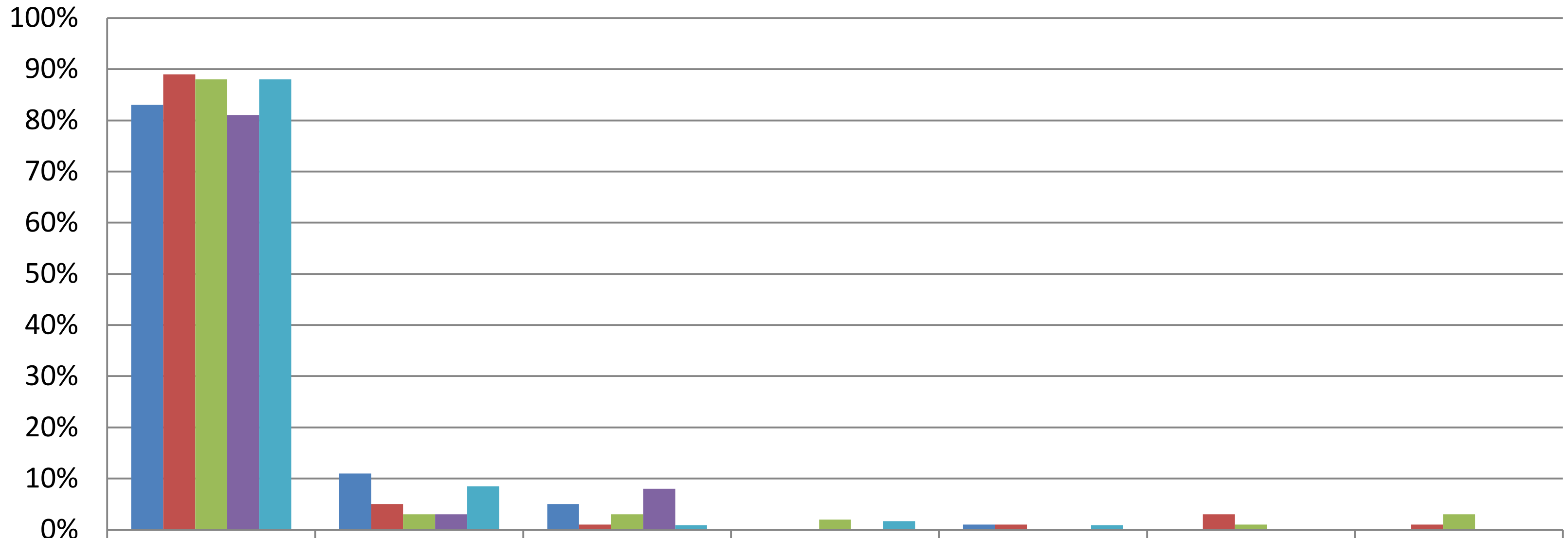
Primary Reason for Visit



	Participant	Spectator	Business	VFR	Holiday	Other
2012	60%	36%	2%	2%	1%	0%
2013	66%	22%	1%	3%	1%	8%
2014	56%	43%	0%	0%	0%	0%
2015	76%	24%	0%	0%	0%	0%
2016	73%	27%	0%	0%	0%	0%

All of the respondents at the event were in Durban as a result of the event, due to the fact that 100% of the respondents indicated that they were either a participant or a spectator. This indicated that the event does attract visitors to Durban. However, there were no significant changes when comparing 2015 and 2016.

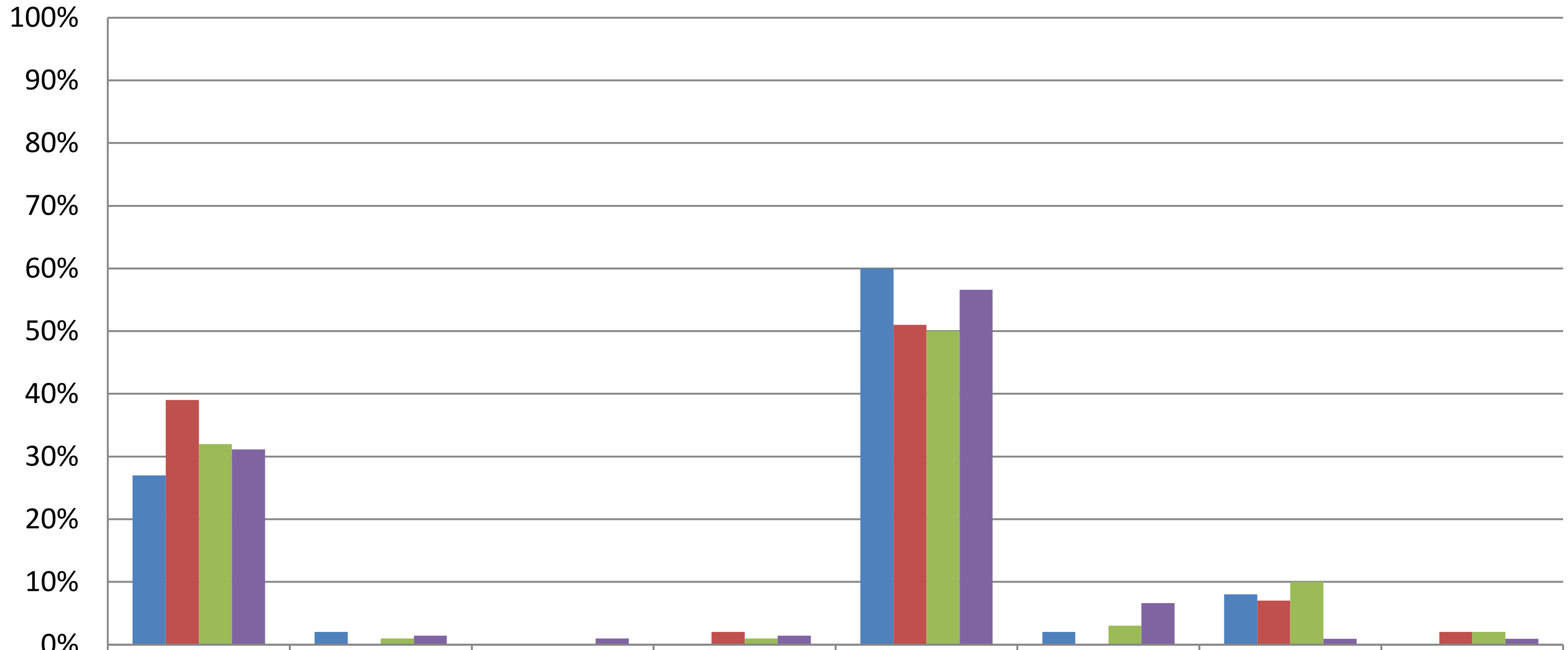
Transport to Event: Visitors Only



	Private vehicle	Airplane	Rental vehicle	Mini-Bus taxi	Bus	Train	Other
2012	83%	11%	5%	0%	1%	0%	0%
2013	89%	5%	1%	0%	1%	3%	1%
2014	88%	3%	3%	2%	0%	1%	3%
2015	81%	3%	8%	0%	0%	0%	0%
2016	88%	9%	1%	2%	1%	0%	0%

The main form of transport that the respondents continued to use was their **private vehicles**, with 88% of the respondents stating so. There was a slight increase in those who used their private vehicle as well as those who arrived flew into Durban. There was a decrease in the number who made use of a rental vehicle. This underlines the difficulty of transporting bicycles on transport other than private vehicles with bike racks.

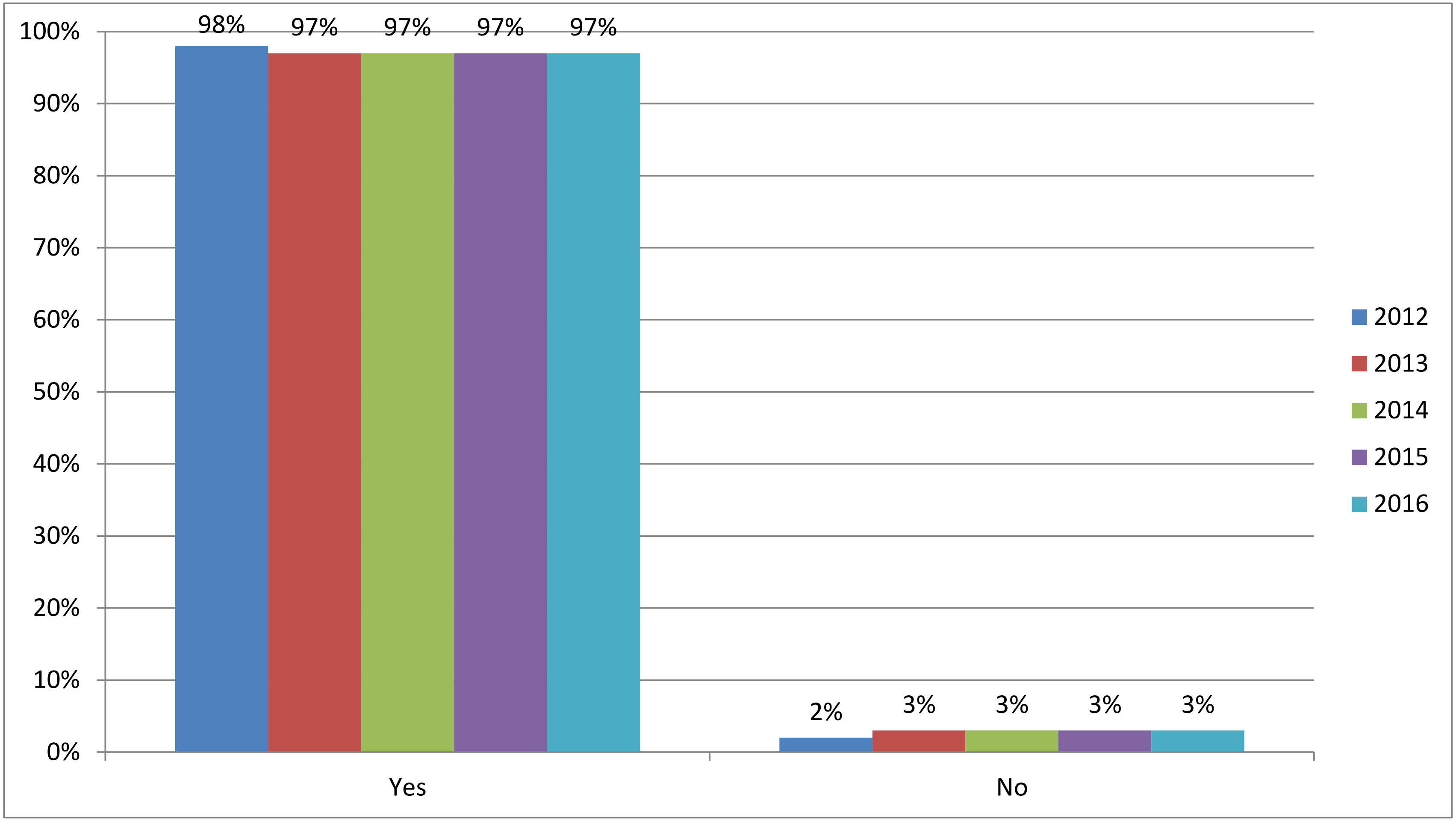
Media Influence



	Word-of-Mouth	TV Ad	Newspaper/Magazine	Posters/Banners/Flyers	Attended Before	Radio	Other	Wesbite/Internet
2013	27%	2%	0%	0%	60%	2%	8%	0%
2014	39%	0%	0%	2%	51%	0%	7%	2%
2015	32%	1%	0%	1%	50%	3%	10%	2%
2016	31%	1%	1%	1%	57%	7%	1%	1%

It was noted that 88% of the respondents were influenced by non-traditional media – i.e. **word-of-mouth** and **attended previously** continued to be the main influences to attend the event. There were no significant changes when comparing 2015 and 2016.

Information Satisfaction



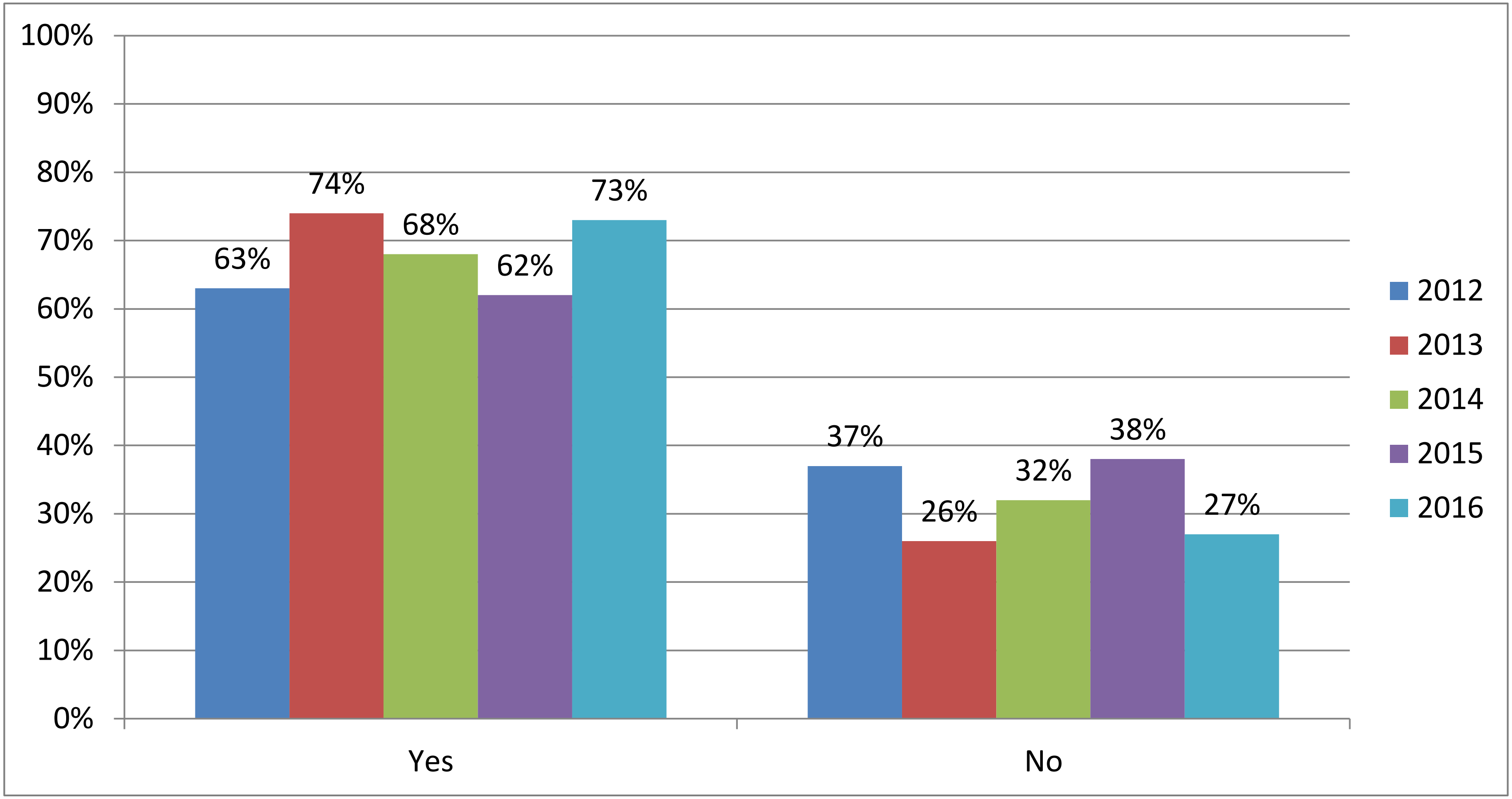
Almost all of the respondents had indicated that they were satisfied with information regarding the event. There has been a constant trend, since 2012, whereby almost all of the respondents have been satisfied with the information.

Event Marketing Improvements

FEEDBACK FROM RESPONDENTS
The event is **well marketed** already, no improvements are needed
Broadcast and advertise more on television
Advertise on the radio
Advertise on social media and the internet
Advertise in other areas/provinces and in other countries

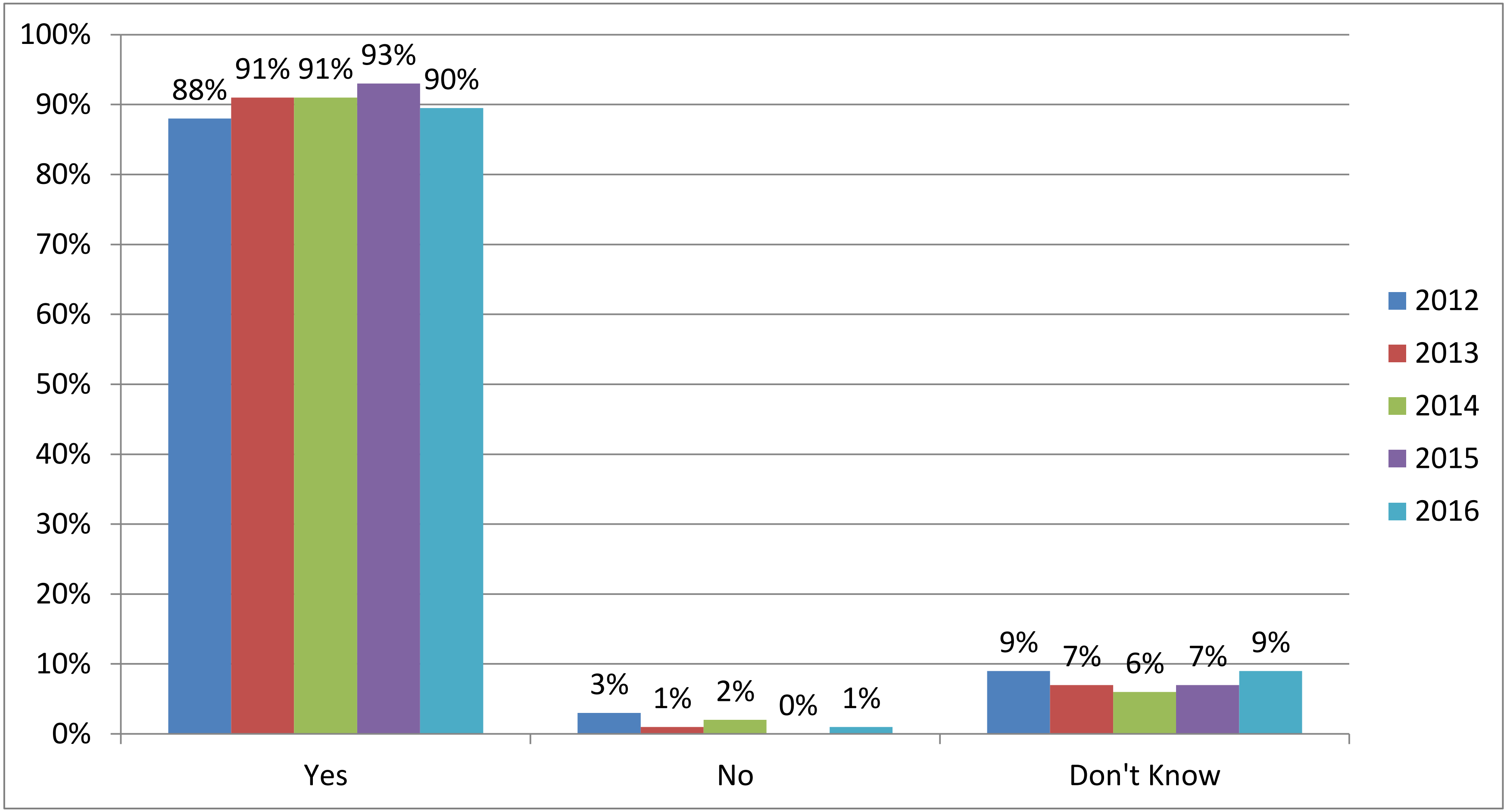
Most respondents were happy with the marketing of the event. However there were some who feel that the event can be marketed more on TV, in other countries and on social networks.

Previous Attendance



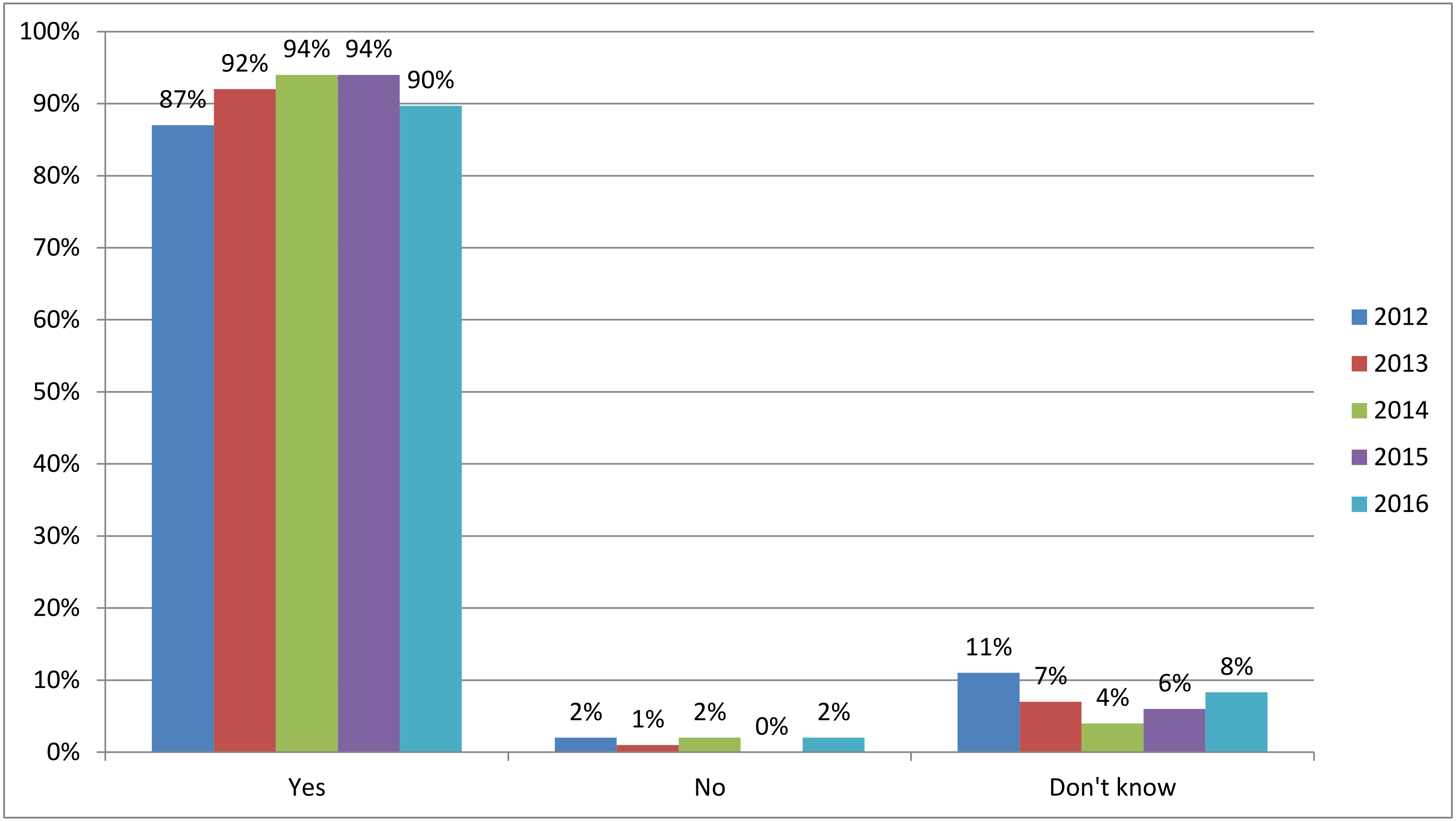
Once again, most of the respondents indicated that they had attended the event in previous years. It was noted that there was an increase of 11% in those who had attended before. 27% of the respondents had indicated that they had attended for the first time. Both of these findings are positive for the overall growth of the event, as it shows that the event attracts new-comers as well as those who have been before.

Future Attendance
All Respondents



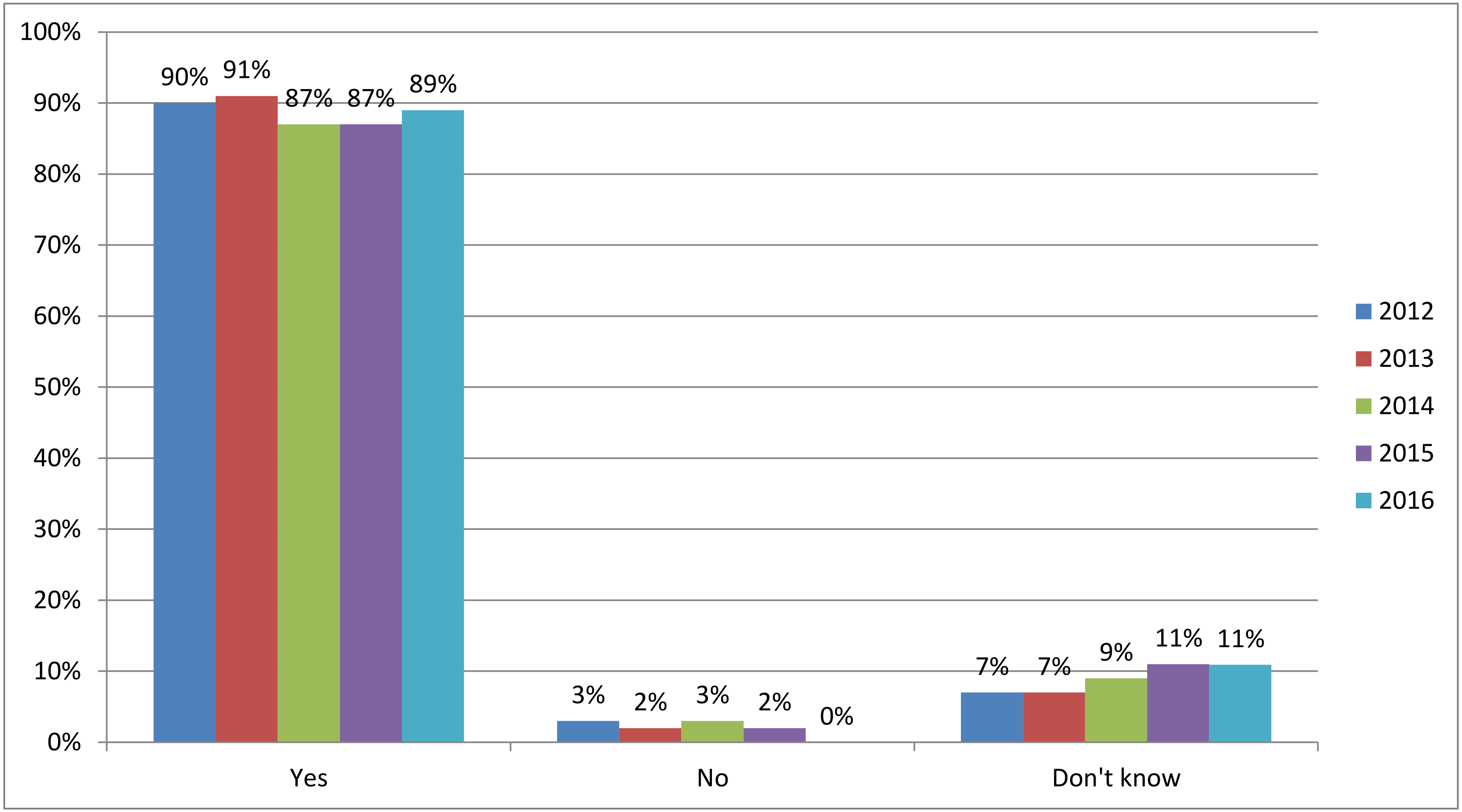
90% of all the respondents indicated that they would attend the event again. This further supports the indication that the event is popular. However, there was a decrease in the number of respondents who said they would attend again, as well as those who were not sure, when comparing 2015 and 2016.

Future Attendance Participants



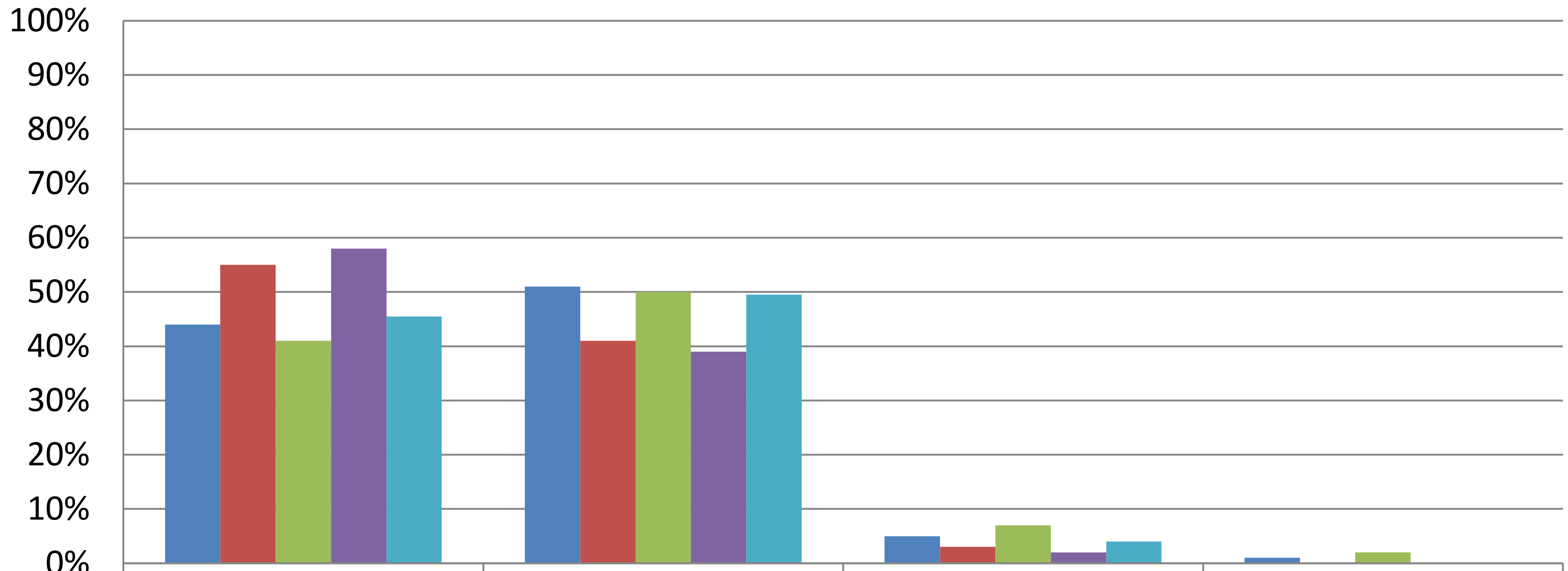
90% of the participant respondents had indicated that they would attend this event again. This bodes well for the event and Durban in the future. There were no other significant changes in 2016 apart from a slight decrease in those who said they would attend again.

Future Attendance Spectators



The spectators also seem to have confidence in this event as 89% indicated that they would like to attend the event again. There were no other significant changes in 2016. The two slides (current and previous) are closely linked in terms of the results, which shows that is is common for one rider to have at least one supporter or spectator.

Experience Rating



	Excellent	Good	Fair	Poor
2012	44%	51%	5%	1%
2013	55%	41%	3%	0%
2014	41%	50%	7%	2%
2015	58%	39%	2%	0%
2016	46%	50%	4%	0%

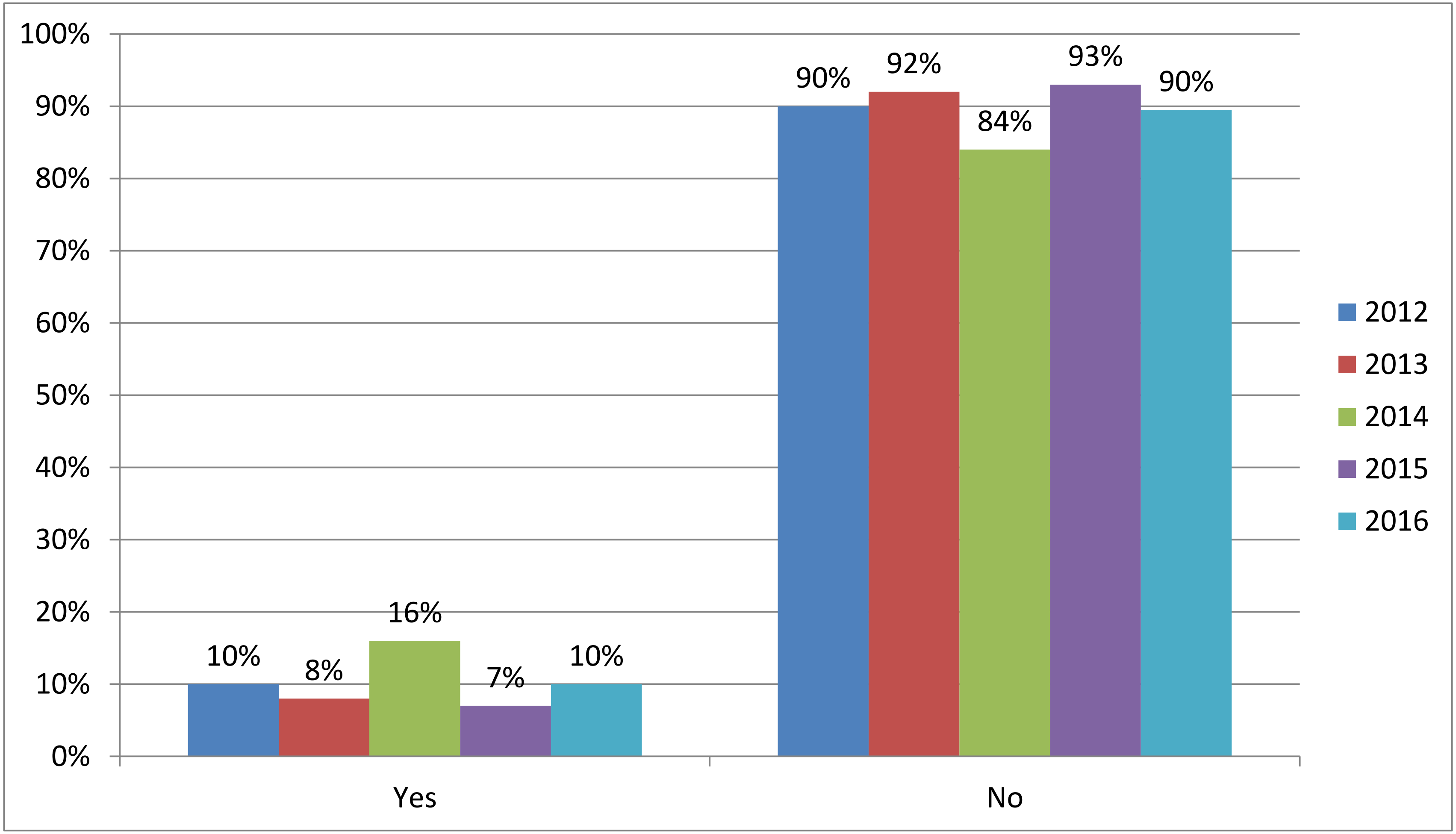
It was positive to note that 96% of the respondents had either a **good** (50%) or **excellent** (46%) experience at the event. It is evident, when comparing 2015 and 2016, that there was a slight decline in those who had an excellent experience while there was an increase in those who had a good experience.

Event Improvement Suggestions

Some of the respondents noted the following **suggestions** in terms of **improving the event** in the future:

- ✓ Improve the Expo and offer more products and specials for the participants.
- ✓ Provide more toilets at the starting area.
- ✓ Make the distance from the finish line to the medals and drinks a lot shorter. It was too long and poorly planned this year.
- ✓ Move the finish into the stadium so it's a more open area where everyone can interact after the race.
- ✓ More signage should be put up at the finish area.
- ✓ More options are needed for the drinks – not happy with all the sugary soft drinks.

Problems Experienced



Few respondents experienced any problems at the event. Mentions of the types of problems were experienced are found on the following slide. When comparing 2015 and 2016, there was slight increase in those who did experience problems at the event, but it was not a significant change.

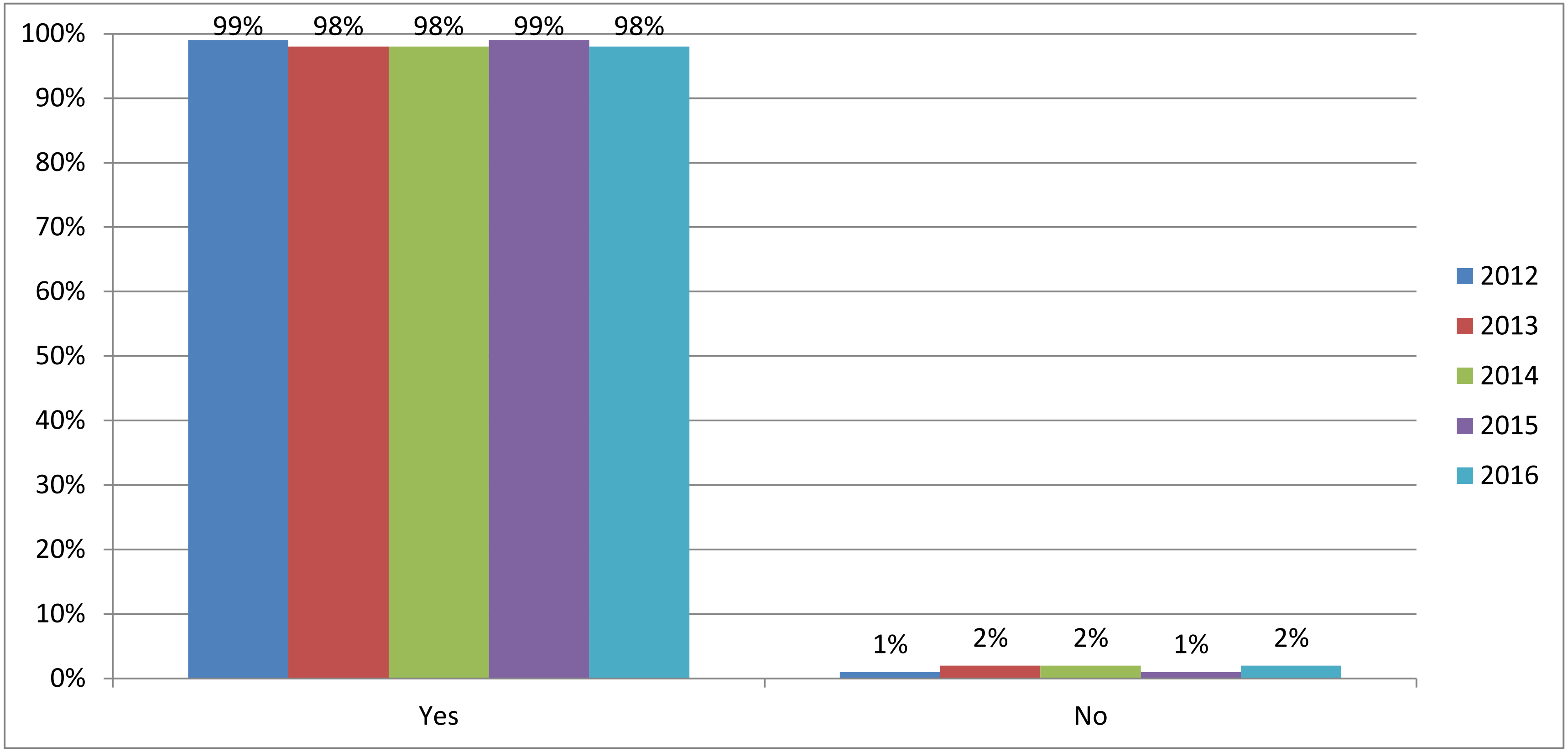
Problems Experienced

The problems that were **experienced by the respondents** were:

- Traffic congestion and parking problems
- The drop-off point was crowded and congested
- The finish point and pathway was poorly organised
- There were sections of the route were potholes were a major problem
- The 'Green Number' participants were made promises of surprises but these were not delivered or communicated properly

Note: These problems above were cited from a very small minority of participants. Upon following up with other participants, there is a reason to not be concerned about these issues. However, they should still be explored further, just in case.

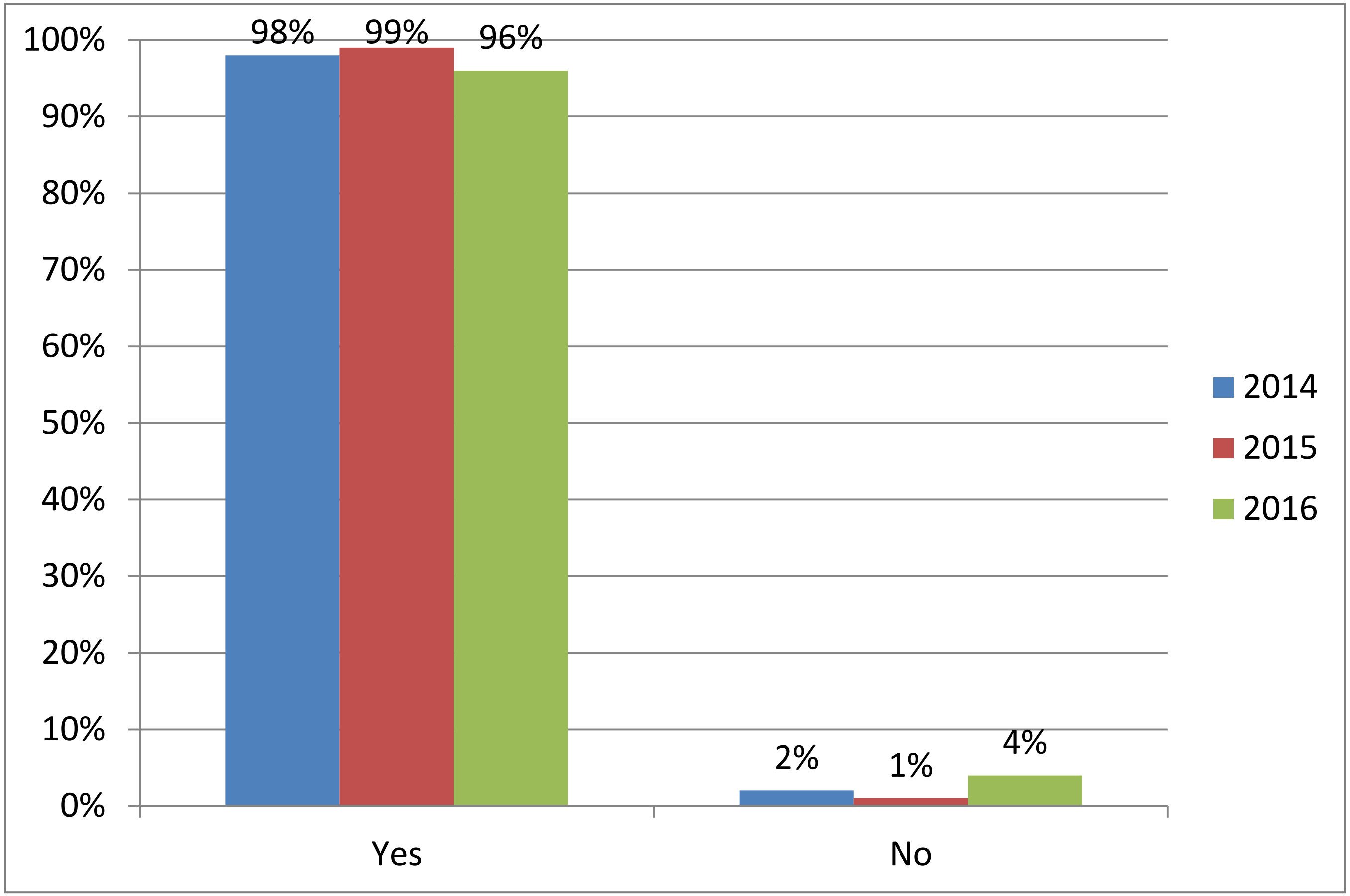
Recommend the Event to Family & Friends?



<u>REASONS FOR RECOMMENDING THE EVENT</u>

- Fun and exciting event
- Family event
- Well organised
- Caters for all levels of cyclists
- Healthy and enjoyable event

Recommend KZN

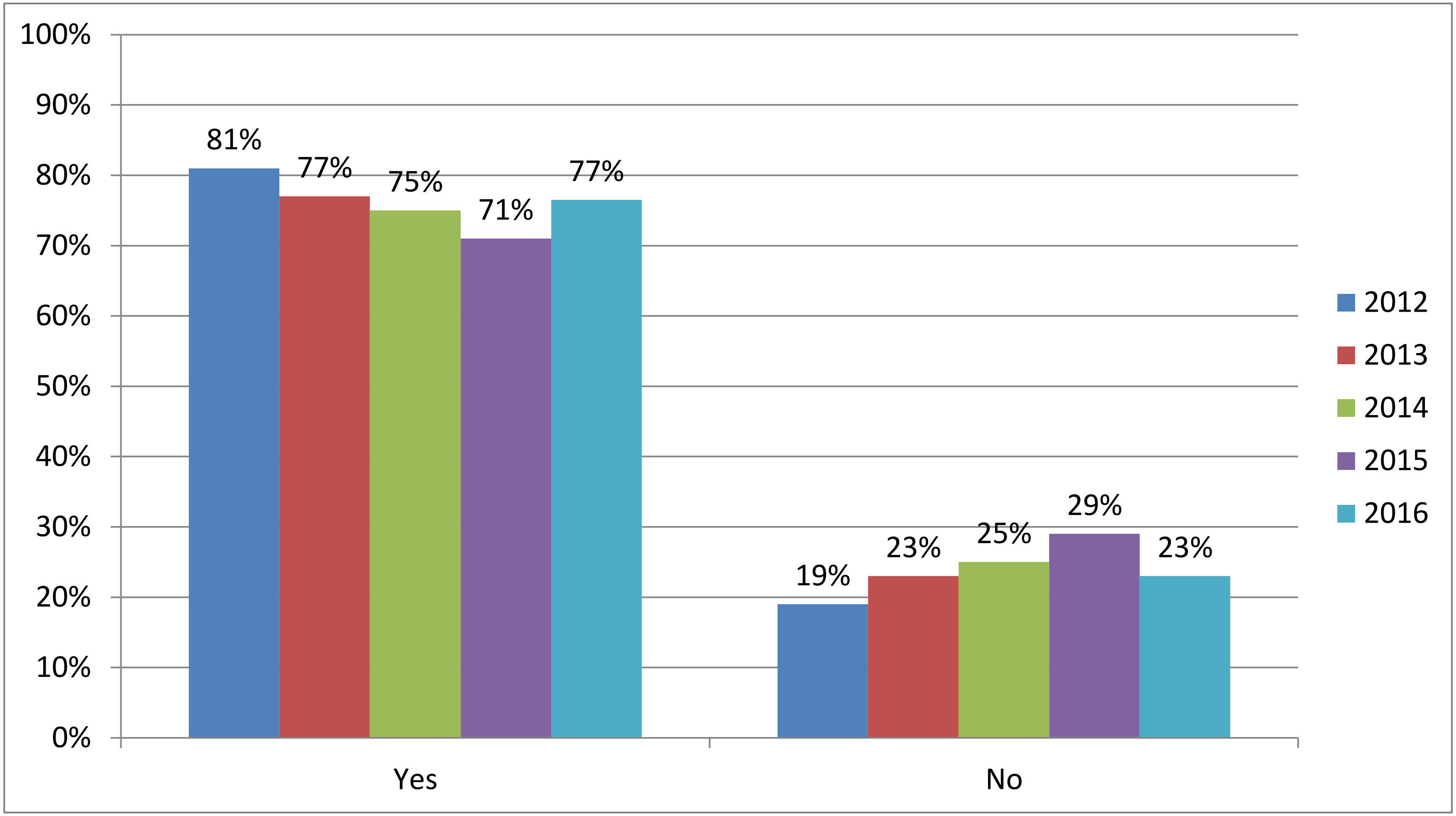


Some the **reasons** for recommending KZN were:

- ✓ Warm weather
- ✓ Lots of things to do
- ✓ Beaches
- ✓ Nice people
- ✓ Beautiful scenery

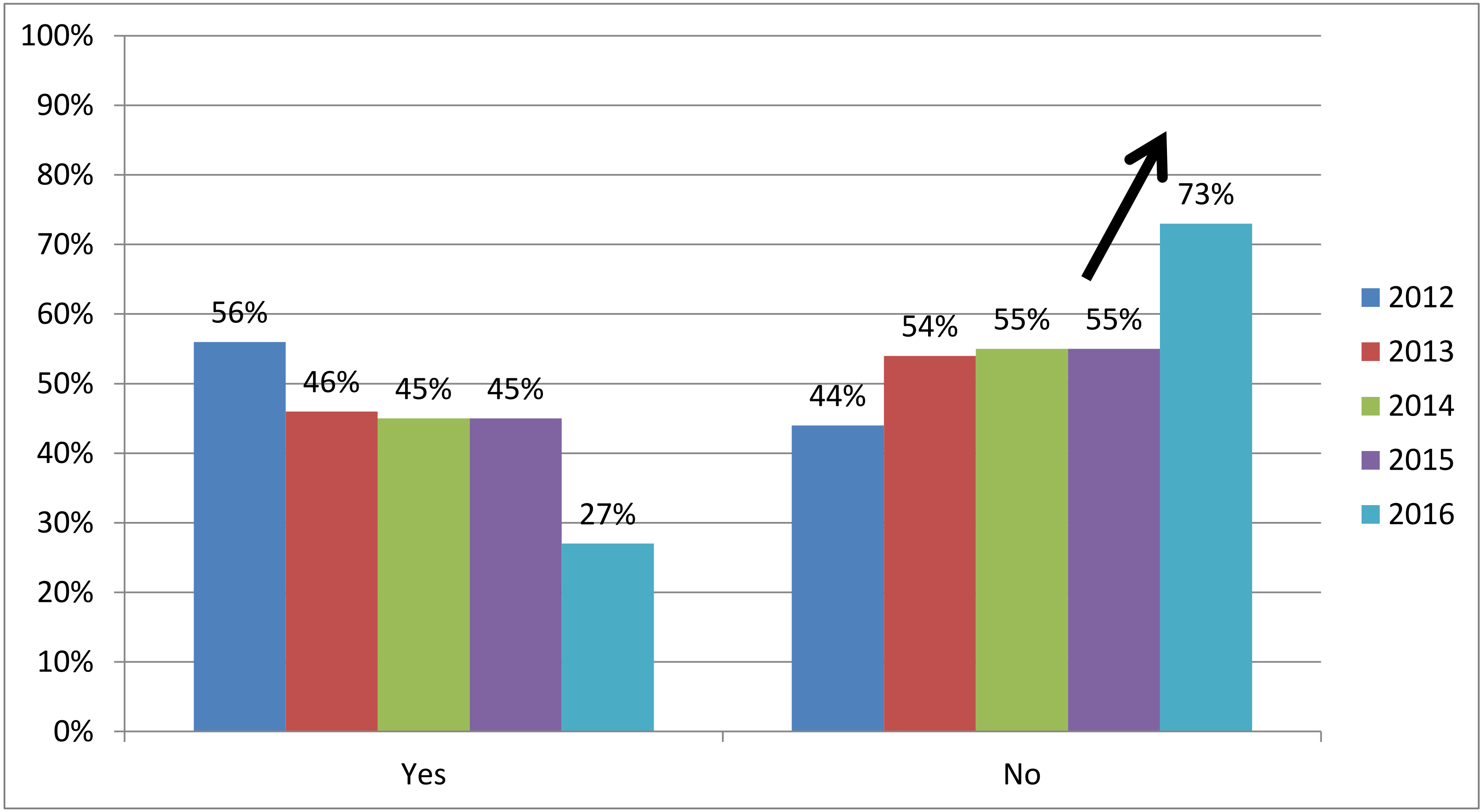
When asked if they would recommend KZN as a tourism destination, the majority of the respondents said that they would. Even though the number of those who answered 'Yes' decreased by 3% in 2016, it is still very positive to see the confidence that people have with the province as a tourism destination.

Plans to visit KZN



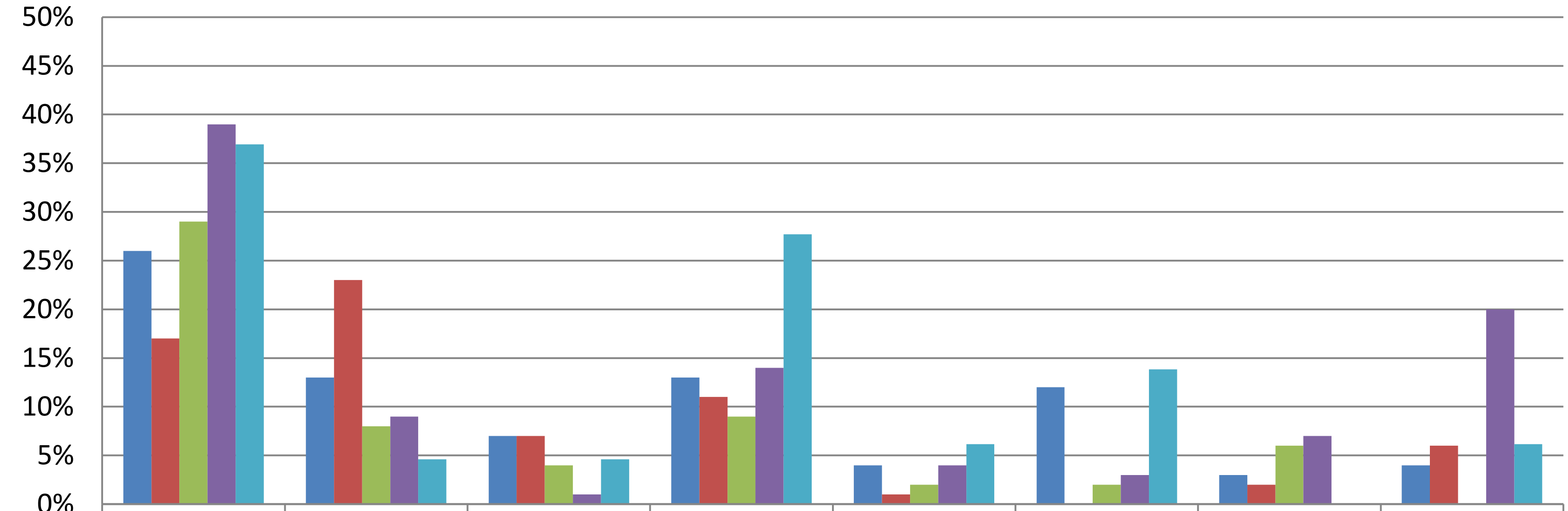
It was positive to note that the majority of the respondents had still indicated that they had plans to visit KZN again for a holiday. Furthermore, there was a 6% increase in the number who said that they would be visiting KZN again, when comparing 2015 and 2016.

TKZN Slogan:
"Zulu Kingdom. Exceptional."



The lack of familiarity with TKZN's slogan has continued to decline, and there was a 18% increase in the number of respondents who were NOT familiar with the slogan in 2016. There is a negative finding for TKZN and for the brand awareness of the organization.

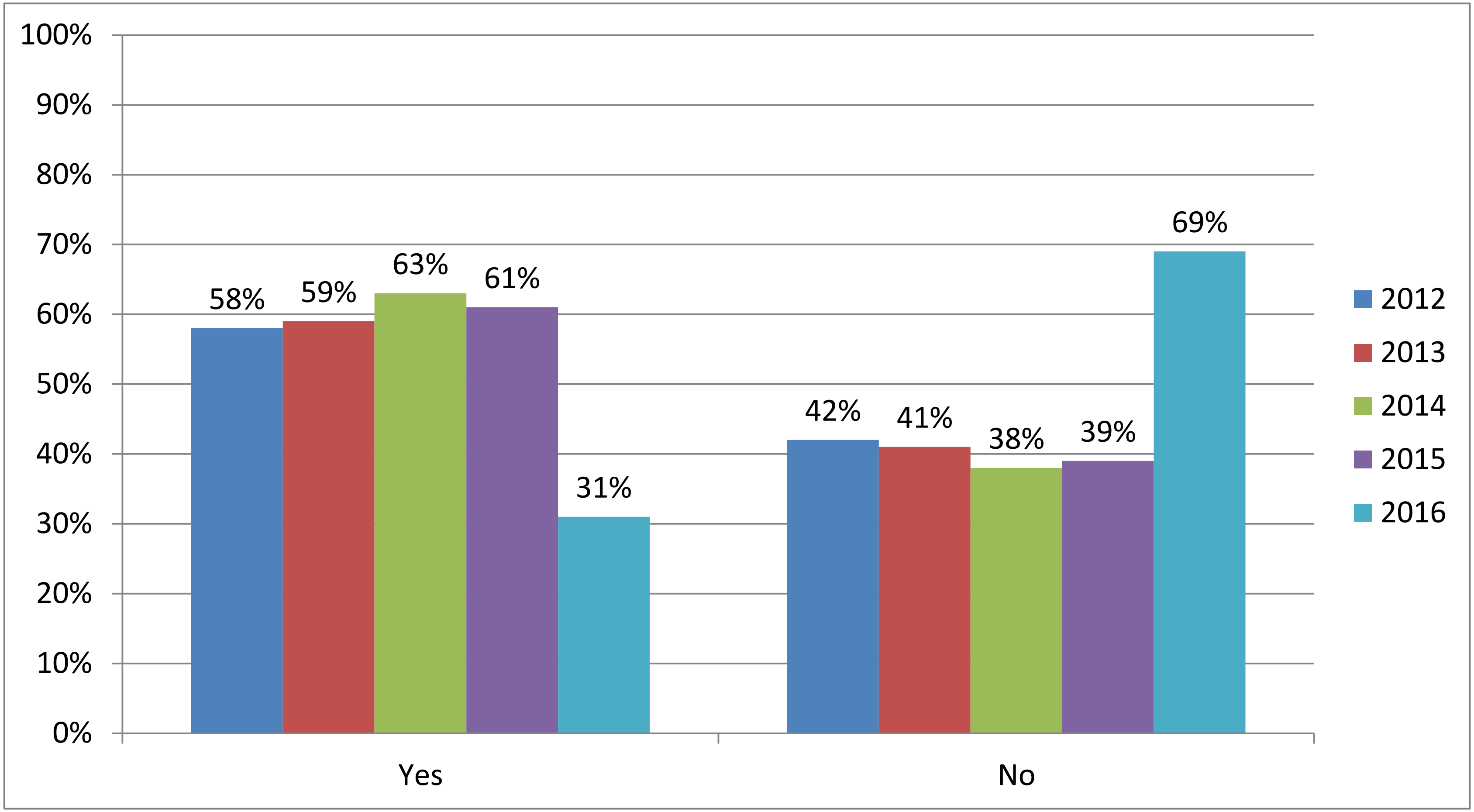
Associations: TKZN's Slogan



	Zulu History/Heritage/Culture/King Shaka	KZN	Durban	Tourism/Holidays	History/Tradition	Zulu People	TKZN/Tourism Organisation	Other
2012	26%	13%	7%	13%	4%	12%	3%	4%
2013	17%	23%	7%	11%	1%	0%	2%	6%
2014	29%	8%	4%	9%	2%	2%	6%	0%
2015	39%	9%	1%	14%	4%	3%	7%	20%
2016	37%	5%	5%	28%	6%	14%	0%	6%

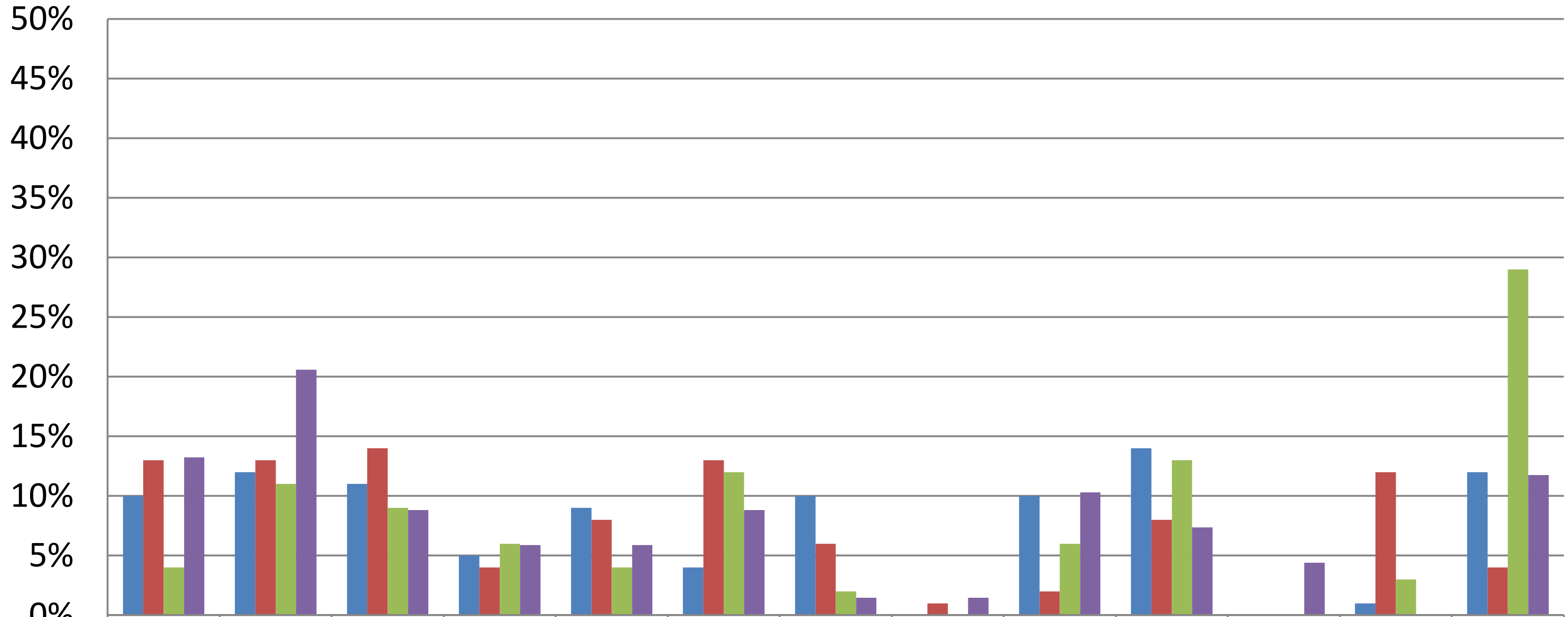
The key associations with TKZN's slogan were **Zulu History/Heritage/Culture/King Shaka.** Other associations included **Tourism/Holidays, Zulu People** and **Durban**. It is positive to note that there was a 14% increase in the number who associated the slogan with tourism and/or holidays.

TKZN Logo



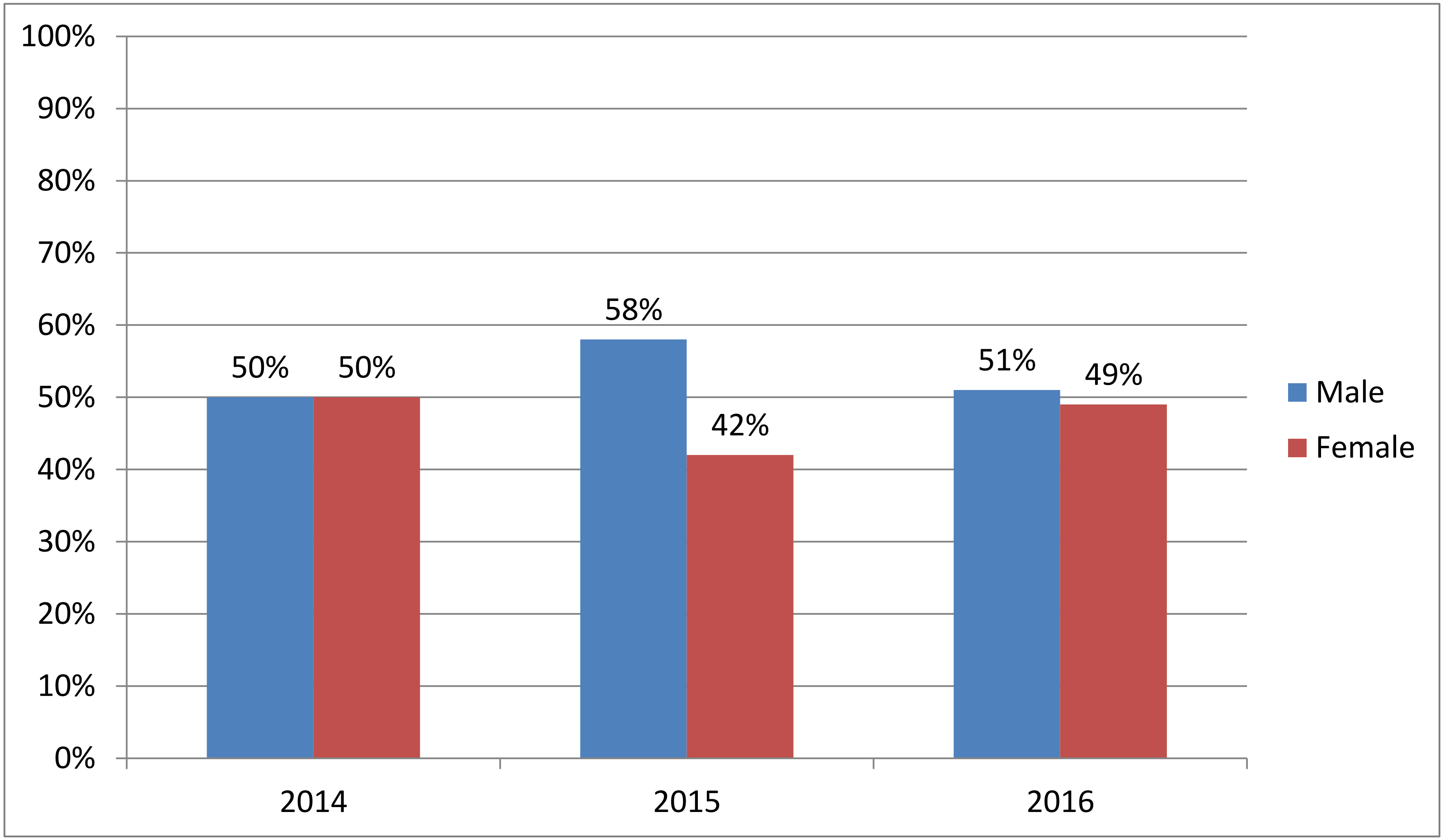
In addition to the slogan, there was also a major decline in the number of respondents who had seen the TKZN logo. Between 2015 and 2016, there was a 30% increase in the number who had NOT seen the logo before. This could be attributed to the confusion with the SAT logo or the change of TKZN's branding in 2011.

Where the TKZN Logo was seen



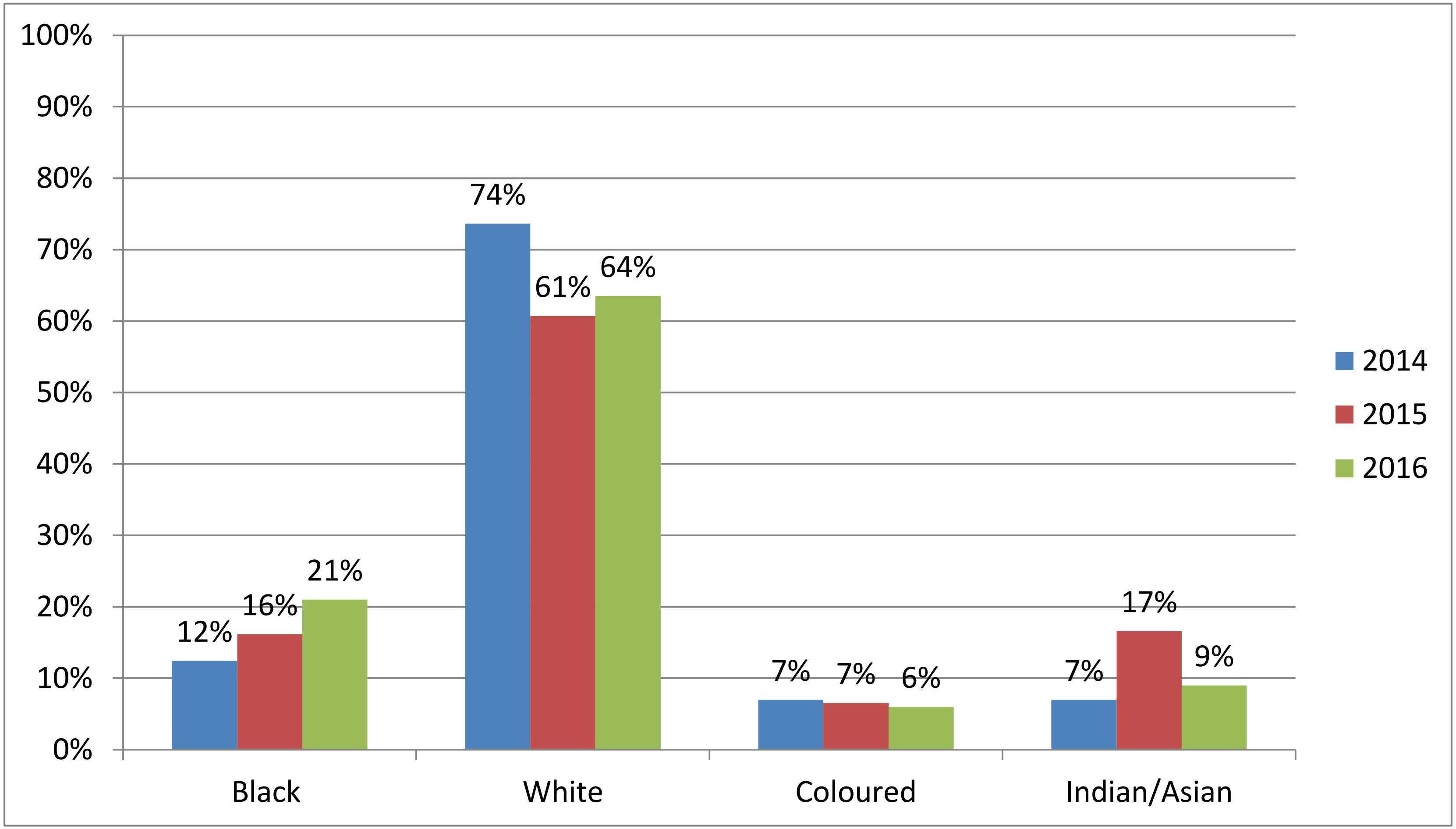
	Billboards/Posters/Banners	Airport/King Shaka Airport	TV	Brochures/Pamphlets	Magazines	Internet/Website	Newspapers	Clothing/Merchandise	Events	Attractions	Accommodation	TKZN/Info Office	Other
2013	10%	12%	11%	5%	9%	4%	10%	0%	10%	14%	0%	1%	12%
2014	13%	13%	14%	4%	8%	13%	6%	1%	2%	8%	0%	12%	4%
2015	4%	11%	9%	6%	4%	12%	2%	0%	6%	13%	0%	3%	29%
2016	13%	21%	9%	6%	6%	9%	1%	1%	10%	7%	4%	0%	12%

Demographic Data: Gender



There was an almost even split in terms of the number of male and female respondents in 2016. Over the past three years, there have been more male respondents than female respondents with only 2015 showing a significant difference.

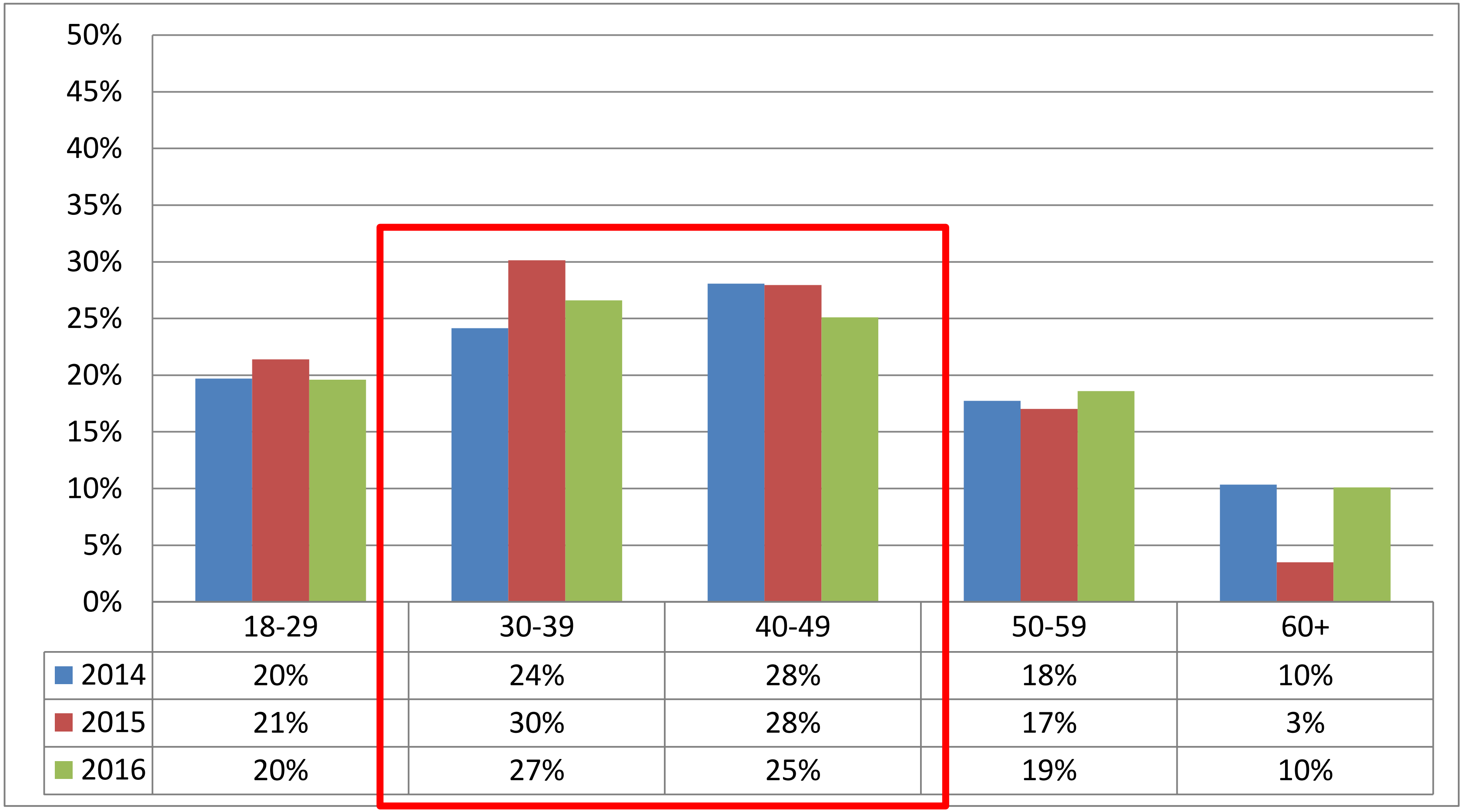
Demographic Data: Population Group



The event continues to be dominated by the '**White**' population group, and his followed by the '**Black**' population group. There has also been a steady rise in the attendance of '**Black**' people (increased by 4% and 5% between 2014 and 2016).

Demographic Data:
Age Group

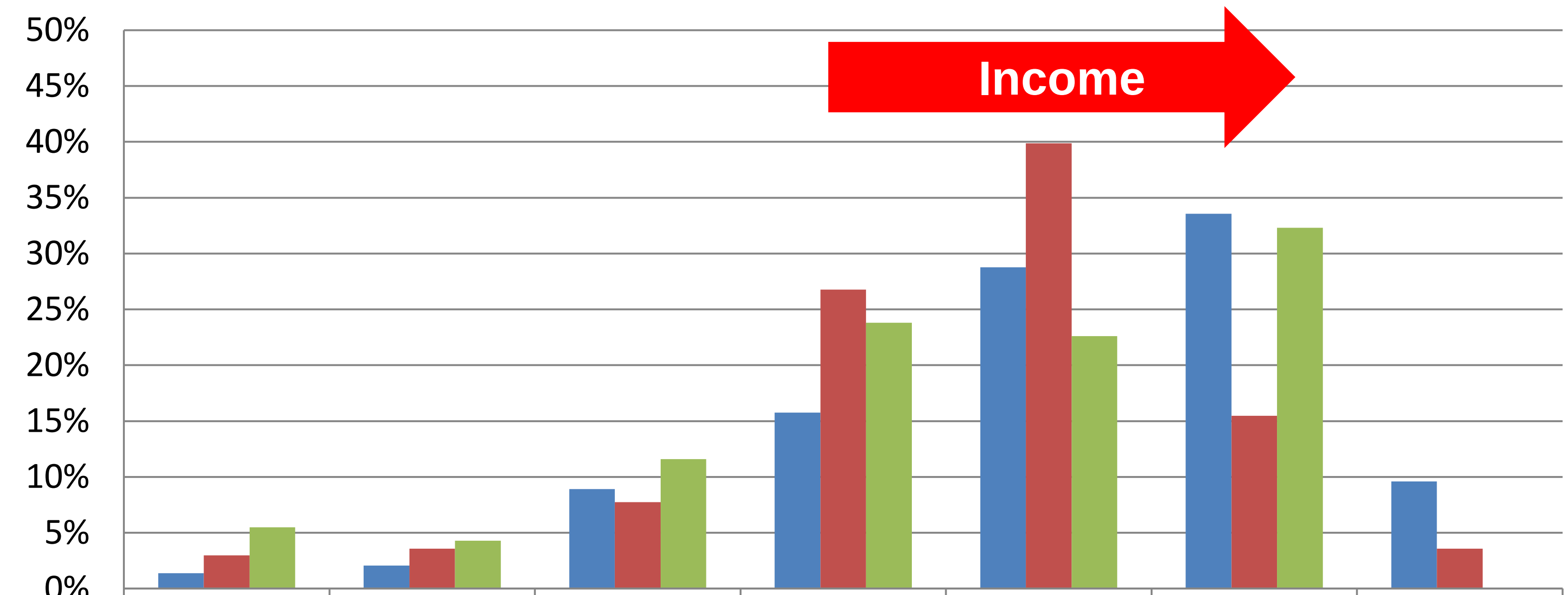
South Africa
KWAZULU-NATAL
Zulu Kingdom. **Exceptional**



	18-29	30-39	40-49	50-59	60+
2014	20%	24%	28%	18%	10%
2015	21%	30%	28%	17%	3%
2016	20%	27%	25%	19%	10%

Approximately 52% of the respondents were considered to be part of the middle-age group – i.e. **30-39** (27%) and **40-49** (25%). These groups were then followed by the age groups of **18-29** (20%) and then **50-59** (19%). There was a 7% increase in the **60+** age group in 2016.

Demographic Data: Income Level



	<R1000	R1000-R5000	R5001-R10 000	R10 001-R20 000	R20 001-R30 000	R30 000+	Other
2014	1%	2%	9%	16%	29%	34%	10%
2015	3%	4%	8%	27%	40%	15%	4%
2016	6%	4%	12%	24%	23%	32%	0%

It is evident that most of the respondents are in the middle to high income brackets, with the majority in 2016 earning over **R30 000 per month**. There was a 17% increase in this income group between 2015 and 2016. This shows that the event attracts people with the capability of a high spend.

Findings

1. In 2016, the entrants had decreased by 3,4% (from 10 022 to 9 685).

2. The number of participant respondents who were visitors increased from 41% in 2015 to 61% in 2016. This would initiate an increase in spend and thus the value of the event.

3. The number of international entrants increased from 64 to ±207. This is extremely positive in terms of the global appeal and growth of the event.

4. Some of the international countries that were represented were the UK, Botswana, Namibia, Swaziland, and Dubai (UAE).

5. The entrants from Gauteng had increased significantly, while KZN experienced a slight decline. There was also a decrease in entrants from all other provinces. Gauteng and KZN still had the highest number of entrants.

6. In terms of all domestic respondents, there was a 19% increase in the number of visitors at the event. This has had a positive influence on the overall value of the event.

7. In 2016, 43% of the respondents were ‘overnight visitors’, while 16% were ‘day visitors’ and the rest were local residents (41%).

Findings

8. The number of respondents from KZN continued to be the highest (58%), and they were followed by respondents from Gauteng (32%), the W Cape (5%), and Mpumalanga (3%). There was a 12% increase in the number of respondents from Gauteng in 2016.

9. The average group size in 2016 was 2.9. There was no significant change when comparing 2015 and 2016.

10. The mean spend of all respondents had decreased slightly in 2016, from 2015, but there were no significant changes. This decrease could merely be a small error in the quality of the data as the figures are still very consistent.

11. The spend of visitors across most of the stayed relatively the same and most of the spend was for necessary items such as food and accommodation. The spend on entertainment and other purchases had decreased. Which could have showed that people were cautious with their money during the event.

12. The economic value of the event in 2016 was estimated to be between **R56 881 011 and R93 267 828**. The value had increased due to some evidence of increased spending.

Findings

13. The respondents continued with the trend of staying for the weekend of the event as most of the respondents stayed for either 3 nights (46%) or 2 nights (25%). There was also a 15% increase in the number of respondents who stayed for 3 nights in 2016.

14. In 2016, most of the respondents stayed in either a luxury hotel (28%) or in a family hotel (21%). There was an increase in the number of respondents who stayed in luxury and family hotels, in self-catering units, and with their friends/family.

15. All of the respondents were in Durban, on the weekend of the event, for the primary purpose of attending the event. 73% of the respondents were participants and 27% were spectators. This indicates that the event is a major drawcard for attracting people into the area for the weekend.

16. Private vehicles continued to be the most preferred form of transport with 88% of the respondents making use of them. Besides this, other respondents made use of airplanes (9%), and public transport (3%) to travel to the city and the event. There was a decline in the number who made use of rental vehicles.

Findings

17. Almost 90% of the respondents were made aware or influenced to attend the event by non-traditional media – i.e. 57% were influence by their previous attendance and 31% were influenced by 'word-of-mouth'.

18. Almost all of the respondents were satisfied with information provided by the event. This has been a constant trend since 2010.

19. Even though the majority of the respondents thought that the event was well marketed, some suggested that there should be more advertising on TV and on social networks, and some suggested expanding the marketing into the rest of SA and into other countries.

20. In 2016, 73% of the respondents had attended the event before. Thus, 27% of the respondents had attended the event for the first time. There was a 11% increase in those who had attended before.

21. In terms of all respondents, 90% said that they would attend the event again in the future, while 9% were not sure. Of these respondents, 90% of the participants said that they would attend again and 89% of the spectators said that they would attend again.

Findings

22. It was positive to note that 96% of the respondents had either a good (50%) or an excellent (46%) experience at the event. There was an increase in those who had a good experience and thus, there was a decrease in those who had an excellent experience. However, these changes are not considered to be significant.

23. In 2016, only 10% of the respondents experienced problems at the event. Some of these include:
    - ✓ Traffic congestion and parking
    - ✓ The finishing areas
    - ✓ Green number participants were made promises that were not kept

24. Almost all (96%) of the respondents said that they would recommend the event to their family and friends. Some of the reasons that were mention include:
    - ✓ Fun and exciting event
    - ✓ Healthy event
    - ✓ Good family day out

Findings

25. It was noted that 77% of the respondents had plans to visit KZN in the next 12 months for a holiday. This is a positive finding for the growth of tourism in the province.

26. Only 27% of the respondents had mentioned that they were familiar with the TKZN slogan, “Zulu Kingdom. Exceptional”. In 2016, there was a 18% increase in terms of those who were not familiar with the slogan. This is a negative finding for TKZN.

27. Most the respondents who were familiar with the slogan continued to associate it with Zulu history and heritage. It was positive to note that there was a 14% increase in the number of respondents who associated the slogan with tourism and holidays.

28. In addition to the findings with the slogan, 69% of the respondents had NOT seen the TKZN logo before. In 2016, this number had increased by 30%. Once again this is a negative finding for TKZN.

29. The logo was noted, by the respondents, at places such as the airport, on TV, at attractions such as uShaka Marine World, as well as others. The majority noted the logo at the airport (21%) and at events such as Amashova (10%).

Findings

30. In terms of demographic data in 2016, the following was noted:

i. 51% of the respondents were male, while 49% were female.

ii. 64% of the respondents were ‘white’, while 21% were ‘black’, 9% were Indian/Asian and 6% were ‘coloured’. There has been a steady increase of ‘black’ respondents since 2014.

iii. Most of the respondents were in the age groups 30-39 (27%) and 40-49 (25%). In 2016, there was an increase of people from the 60+ age group.

iv. Most of the respondents fell income a middle or high income group, with the majority falling into the group of R30 000+. This shows that the event attracts people with the capability of a high spend.

Recommendations

The following recommendations are aimed at the **organizers** of the event:

1. It is advised that the organizers create more excitement around the event by exploring more ways to increase the appeal of the Expo/Registration that leads up to the event. By doing so, more people (especially visitors) would be attracted into the city before the race day and would thus increase their length of stay, overall experience, and their spend at the event.
2. It is recommended that the finishing point and the organization thereof should be reconsidered for 2017. The reason for this is because a number of respondents noted their dissatisfaction with the way that the finishing area was set up, especially regarding the time it took to finish, collect medals and refreshments and then arrive at the supporters marquee.
3. More signage should be introduced at both the start and the finish in order to create a clearer indication of where everyone should go to get to where they need to be.
4. It is advised that the refreshments that are on offer should include more of a variation. This comes from the fact that some respondents were not happy with the amount of sugary soft drinks. Some of them noted the need for water and other healthier refreshments. It is important to remember that there is an ever changing demand for healthier (low carb, no sugar) types of foods these days.

Recommendations

5. In order to alleviate the traffic congestion and parking problems, it is recommended that a “Park-n-Ride” system is introduced that will allow spectators and participants to park easier and be transported by kombis and/or busses to the start or away from the finish. However, an event of this magnitude (over with over 10 000 people in attendance) will always cause traffic issues, and whatever can be done to alleviate this is highly recommended.
6. This report and its findings should be presented and handed to local municipalities and provincial government, not only to prove that an event like the Amashova is extremely valuable for the province, but it could also act as a key document that could motivate for more funding for road maintenance and general infrastructural upgrades. The slightest sign of litter, potholes, or any other “eye-sores” or dangers could deter many people from returning to the event in the future.
7. Although many people are influenced by word-of-mouth and their previous attendance, it is still recommended that the organizers invest in more TV and radio advertising as well as increasing the event’s presence online and on social media. This is very important for growing, the already increasing, international and provincial markets (other than KZN).

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 organisers of this event as it has the potential to grow into a much larger event in KZN, as its potential grows every year.
2. TKZN should assist the organisers with regards to travel packages that can be offered to both international entrants as well as domestic entrants from other provinces. If people are encouraged to take a holiday around the event, it will thus increase their length of stay and their total spend in the province.
3. It is advised that TKZN works towards a brand recognition and association 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.
4. The research team could conduct a separate and specific study on the branding, i.e. the slogan and logo of TKZN.
5. It is advised that the research team should work on refining the way to in which the number of spectators is obtained because at this point the figures that are used are based on estimates (how many people are observed at the finish).
6. TKZN should assist the organizers with determining how to increase the number of cyclists from other provinces. It is advised that the Cape Argus event could be used as a "best practice example".