

Amashova Durban Classic – 14th October 2012

Impact Assessment: Top Line Summary Report



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Positive Highlights



- 99% of respondents said they would recommend the event to family and friends.
- 98% of respondents said they would recommend KZN as a tourist destination to family and friends.
- 81% of respondents indicated that they would return to KZN for a holiday in the next 12 months.
- The number of entrants in the 106km race was the highest ever in 2012, and there has been consistent growth in this category since 2009.
- The majority of participants, 87%, said they would participate in the event again in future.
- 98% were satisfied with information received
- The number of foreign entrants is the highest since 2007, at 53 in 2012.
- 91% of respondents rated the experience of the event as good or excellent.

Methodology



Primary Data:

- 196 face-to-face interviews were conducted with respondents randomly selected on the day of the race at the finishing point.
- The interviews were conducted using a structured questionnaire.

Secondary Data:

- Amashova organizers
- Cape Argus Cycle Tour organizers

Entrants

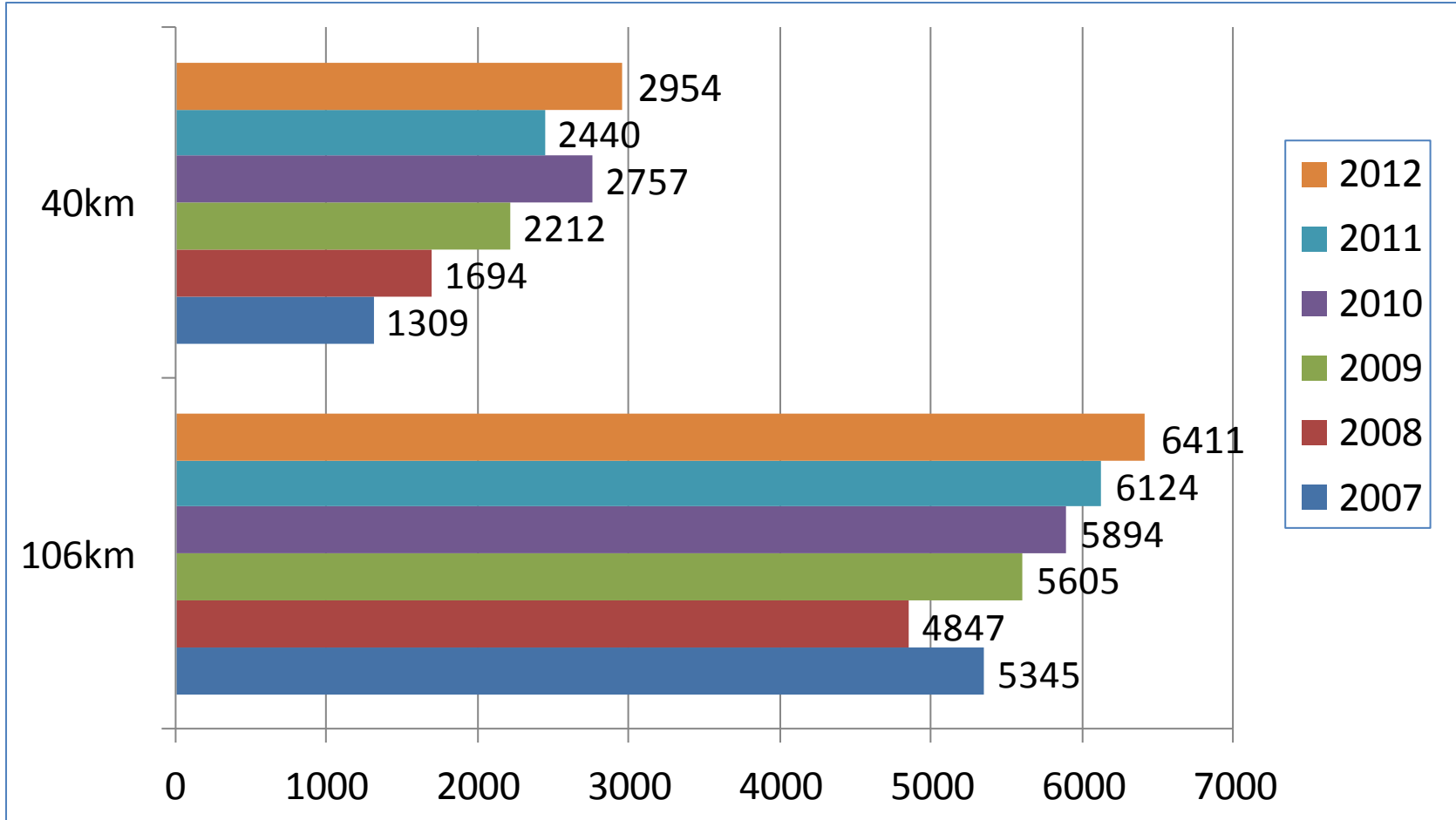


Event	2005	2006	2007	2008	2009	2010	2011	2012
106km	6 530	5 774	5 345	4 847	5 605	5 894	6 124	6 411
40km	867	1 387	1 309	1 694	2 212	2 757	2 440	2 954
Minishova 5km	225	494	252	132	96	*-	-	
Minishova 1km	291	355	188	119	82	-	-	
Total	7 913	8 010	7 094	6 792	7 995	8 651	8 564	9 365

*Note: As from the year 2010, the minishova races did not take place. The previous surveys only covered 106km and 40km races only.

The year 2010 experienced the highest number of entrants. The total decreased slightly in 2011 as a result of a decline in the number of entrants for the 40km race.

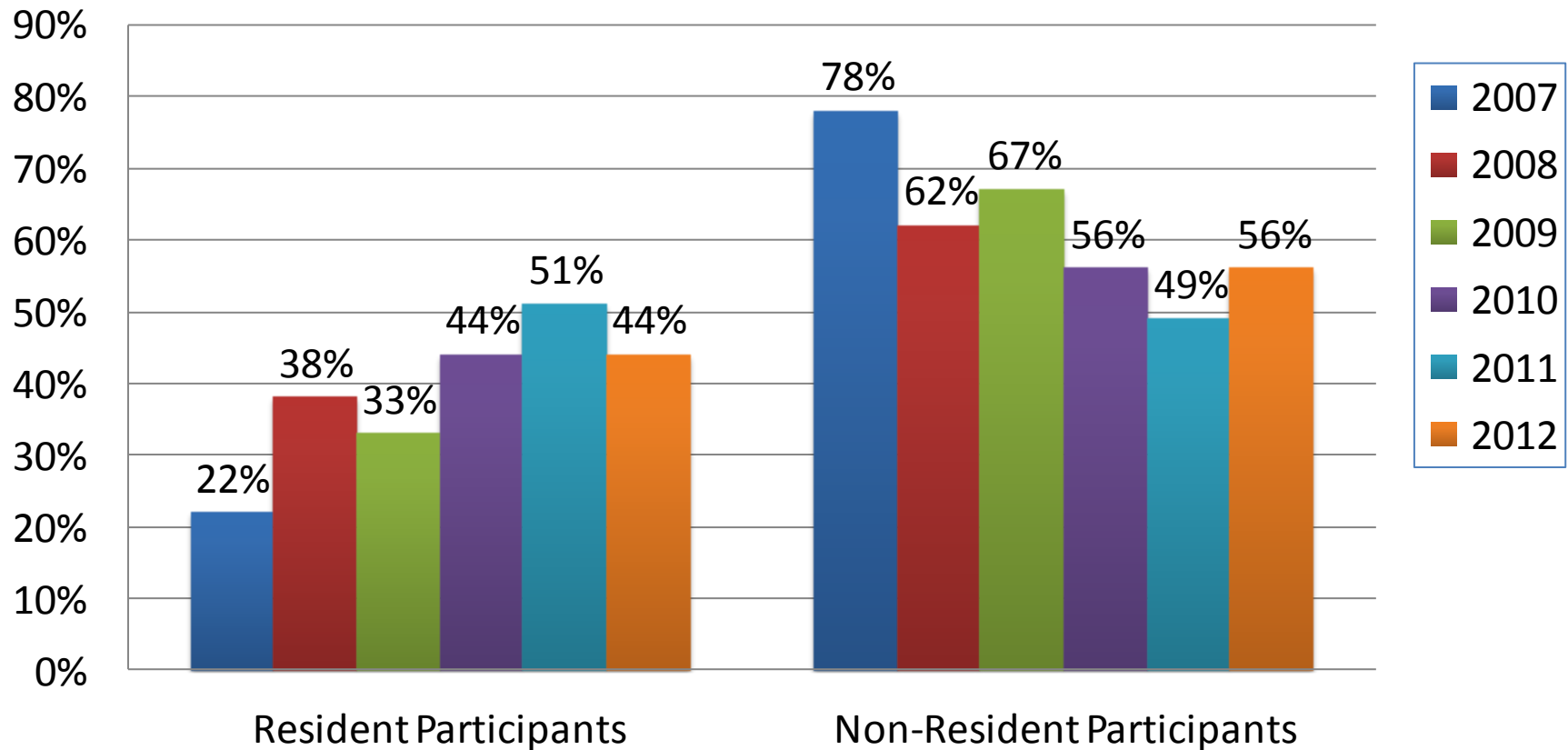
Entrants (cont'd)



The graph above suggests that the race is growing consistently since 2009, in terms of the number of entrants.

*Nature of Participants

Resident Participants vs Non-Resident Participants



A Z-test revealed no statistical significant increase in 2012 of the non-resident participants when compared to 2011.

Entrants: International by Country



COUNTRY	2007	2008	2009	2010	2011	2012
Canada						1
Botswana	2	-	3	-	1	5
Mauritius	2	-	-	-	-	
Namibia	3	-	-	1	-	
Singapore	1	-	-	-	-	
Swaziland	10	2	6	6	1	19
USA (Rhodes Island)	1	-	-	-	-	
UK	3	2	8	6	-	11
Dubai	-	1	-	-	-	3
Eritrea	-	4	-	-	-	
Lesotho	-	6	-	-	-	
Malawi	-	10	-	-	1	1
Middle East	-	2	-	-	-	
Nigeria	-	6	-	-	-	

Entrants: International by Country (cont'd)



COUNTRY	2007	2008	2009	2010	2011	2012
Zambia	-	5	-	-	-	
Zimbabwe	-	-	3	-	-	2
Mozambique	-	-	1	1	-	
Australia	-	-	-	2	-	2
Belgium	-	-	-	1	-	
USA	-	-	-	2	-	2
Switzerland	-	-	-	1	-	
UAE	-	-	-	1	-	
France	-	-	-	-	2	
Germany	-	-	-	-	1	
Ireland	-	-	-	-	1	
England	-	-	-	-	1	
Japan						2
Total	22	38	21	21	8	

Entrants: International by Country (cont'd)



COUNTRY	2007	2008	2009	2010	2011	2012
Sierra Leone						1
Netherlands						4
Total	22	38	21	21	8	53

Entrants: SA by Province

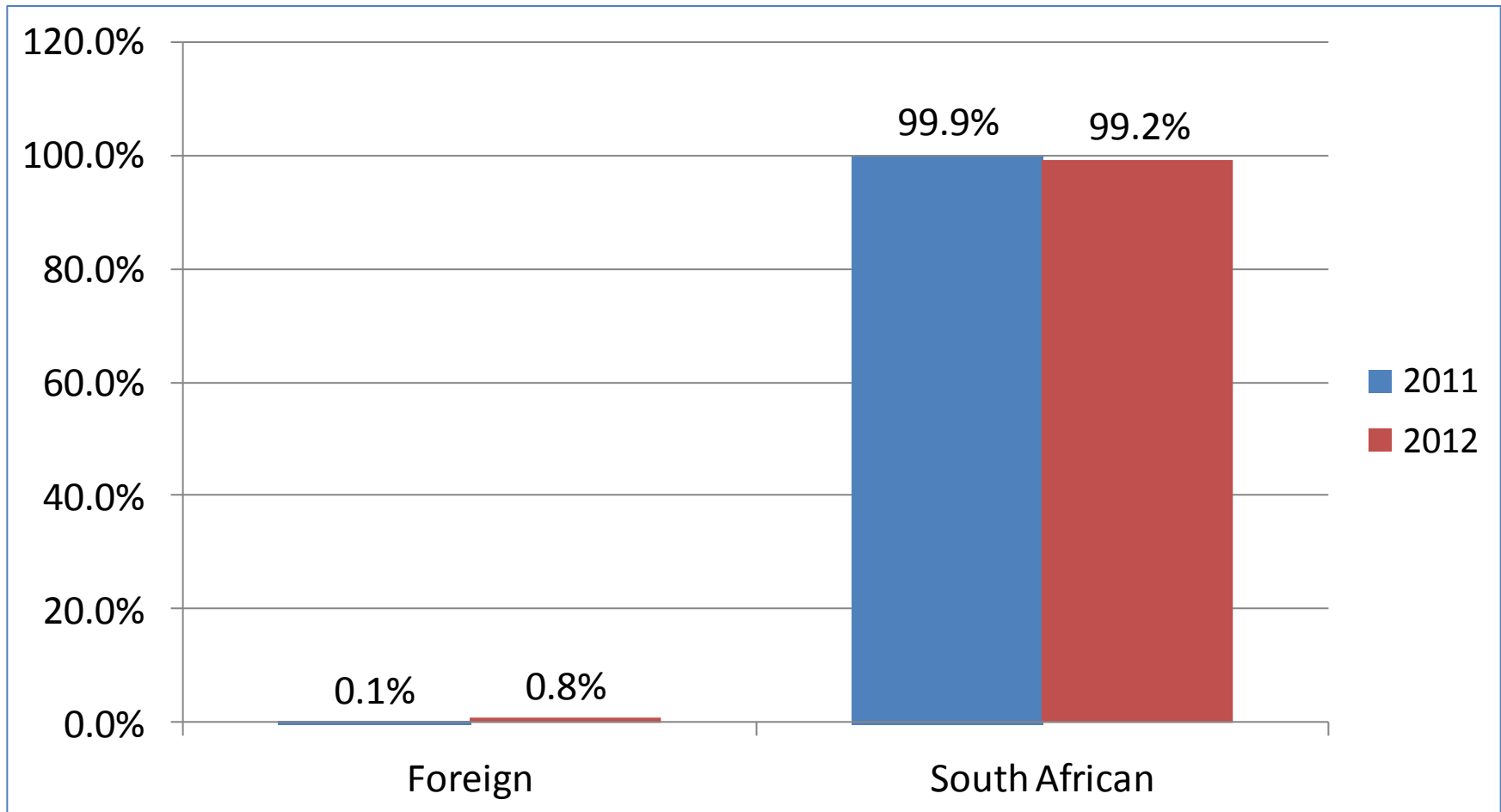


Province	2007	2008	2009	2010	2011	2012
Gauteng	53%	29%	28%	28%	31%	41%
KZN	39%	63%	53%	66%	59%	48%
Free State	3%	2%	2%	2%	2%	2%
Eastern Cape	2%	1%	11%	0.4%	1%	2%
Limpopo	1%	-	-	0.6%	1%	1%
North West	1%	-	1%	1%	1%	1%
Mpumalanga	-	2%	2%	1.5%	2%	1%
Western Cape	-	2%	2%	1%	2%	3%

The 2012 race saw a 10% increase in the number of entrants from Gauteng.

Entrants from KZN decreased by 11% when comparing 2011 and 2012 events.

Nature and Extent of South African vs International Participants:



Nature and Extent of Cape Argus Cycle Tour Participants:



Province	2007	2007 (%)	2008	2008 (%)	2009	2009 (%)	2010	2010 (%)	2011	2011 (%)
Eastern Cape	1 814	5%	1 785	5%	1 691	4%	1 641	4%	2 523	7
Free State	1 519	4%	1 433	4%	1 265	3%	1 131	3%	1 008	3%
Gauteng	12 920	33%	11 984	31%	10 612	28%	10 111	27%	9 490	25%
KZN	2 279	6%	2 127	5%	1 963	5%	1 931	5%	1 952	5%
Limpopo	417	1%	398	1%	341	1%	284	1%	289	1%
Mpumalanga	819	2%	845	2%	807	2%	831	2%	722	2%
North West	791	2%	883	2%	819	2%	791	2%	696	2%
Northern Cape	829	2%	741	2%	657	2%	640	2%	573	2%
Western Cape	18 213	46%	18 927	48%	19 742	52%	20 587	54%	20 507	54%
TOTAL	39 601	100%	39 123	100%	37 897	100%	37 947	100%	37 760	100%

Nature and Extent of Cape Argus Cycle Tour Participants:



Province	2010	2010 (%)	2011	2011 (%)	2012	2012 (%)
Eastern Cape	1 641	4%	2 523	7%	2 027	6%
Free State	1 131	3%	1 008	3%	971	3%
Gauteng	10 111	27%	9 490	25%	8 908	25%
KZN	1 931	5%	1 952	5%	1736	5%
Limpopo	284	1%	289	1%	309	1%
Mpumalanga	831	2%	722	2%	688	2%
North West	791	2%	696	2%	685	2%
Northern Cape	640	2%	573	2%	537	2%
Western Cape	20 587	54%	20 507	54%	19 534	55%
TOTAL	37 947	100%	37 760	100%	36 395	100%

Nature and Extent of Cape Argus Cycle Tour Participants (cont'd)



Country	2007	2007 (%)	2008	2008 (%)	2009	2009 (%)	2010	2010 %	2011	2011 (%)
Asia	21	1%	68	3%	24	1%	26	1%	14	1%
Aus/NZ	86	4%	99	4%	60	3%	79	4%	92	7%
Europe	443	22%	500	22%	483	24%	523	23%	387	29%
Middle East	36	2%	14	0.5%	45	2%	77	3%	34	3%
North America	163	8%	185	8%	202	10%	176	8%	159	12%
Rest of Africa	763	37%	732	32%	649	32%	680	30%	255	19%
South America	5	0.2%	11	0.5%	4	0	14	1%	3	0.2%
UK	537	26%	674	30%	573	28%	656	29%	376	28%
Central America	-	-	-	-	-	-	3	0.1%	-	-
TOTAL	2 054	100	2 283	100%	2 040	100%	2 234	100%	1 320	100%

Nature and Extent of Cape Argus Cycle Tour Participants (cont'd)



Country	2010	2010 %	2011	2011 (%)	2012	2012 (%)
Asia	26	1%	14	1%		2
Aus/NZ	79	4%	92	7%		4
Europe	523	23%	387	29%		26
Middle East	77	3%	34	3%		3
North America	176	8%	159	12%		10
Rest of Africa	680	30%	255	19%		29
South America	14	1%	3	0.2%		1
UK	656	29%	376	28%		27
Central America	3	0.1%	-	-		-
TOTAL	2 234	100%	1 320	100%		100%

Nature and Extent of Cape Argus Cycle Tour Participants (cont'd)



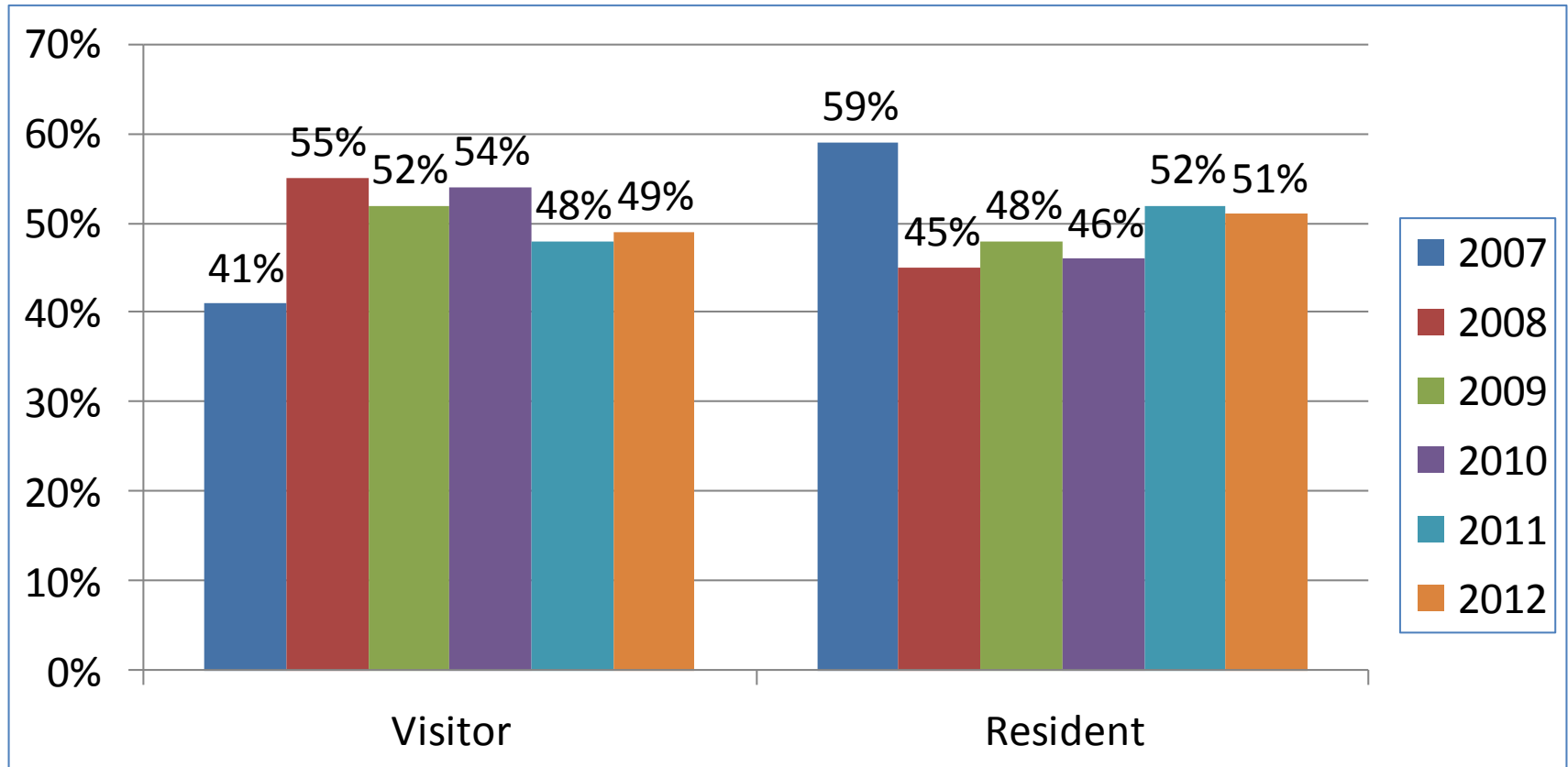
	2007	2008	2009	2010	2011	2012
SA Cyclists	95%	95%	95%	95%	97%	93%
Non-SA Cyclists	5%	5%	5%	5%	3%	7%

Comparison of Argus and Amashova South African and Non-South African Cyclists:

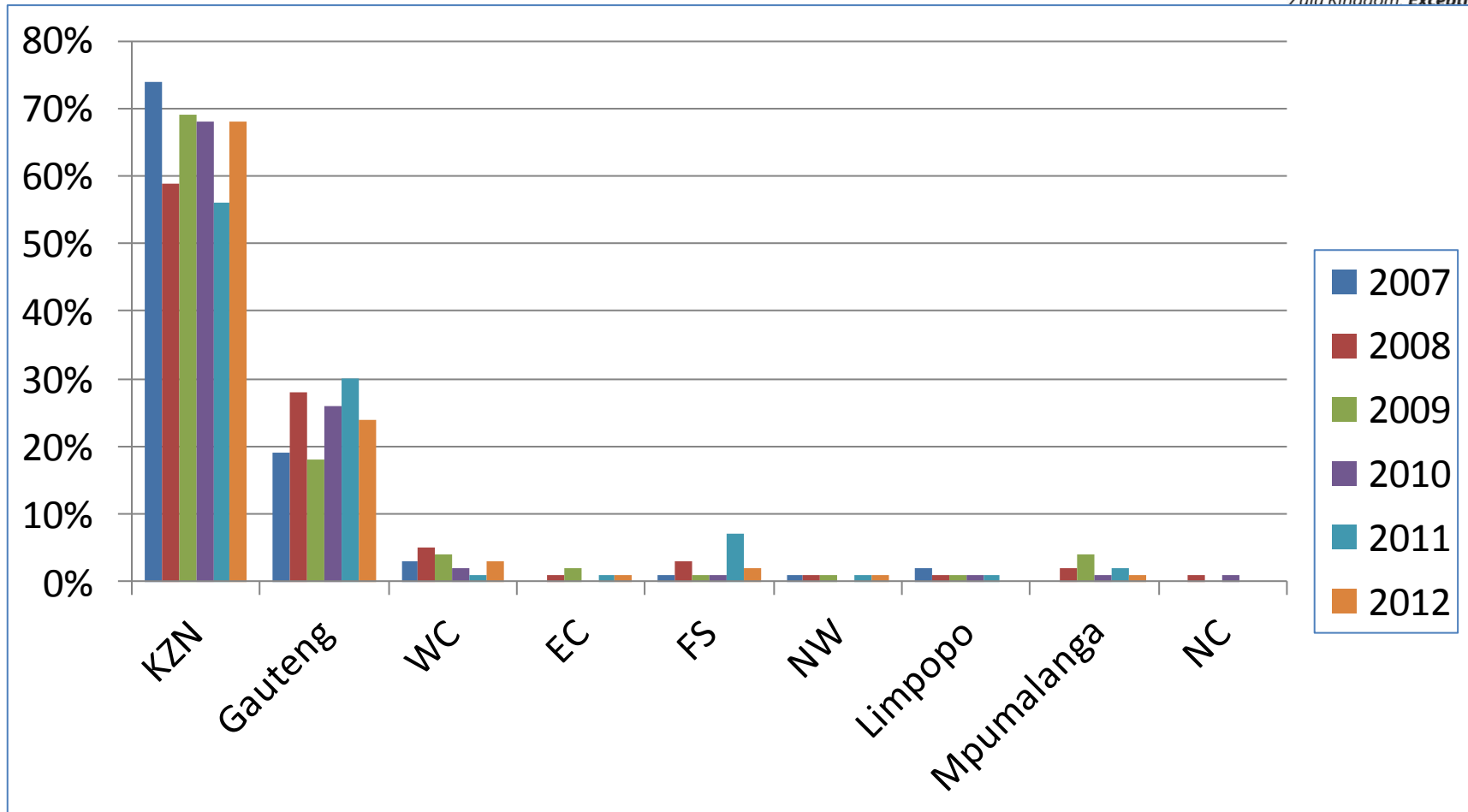


	Cape Argus	Amashova
SA Cyclists	93%	99.2%
Non-SA Cyclists	7%	0.8%

Nature of Domestic Respondents of Amashova



Nature of Respondents



A Z-test did not indicate any significant increase in the number of respondents from KwaZulu-Natal.

Average Group Size



2007	2008	2009	2010	2011	2012
3.1	3.0	3.1	2.9	2.8	3.4

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.

Average Spend

Year	**Low Estimate	*Middle Estimate	***High Estimate
2007	R805	R989	R1 173
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

* 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

Breakdown of Non-Resident Spend



Item	2007	2008	2009	2010	2011	2012
Accommodation	R1 648	R1 559	R1 334	R1 804	R1 911	R2 645
Transport	R706	R1 079	R629	R 1 169	R1 055	R1 358
Food and Beverages	R522	R537	R369	R669	R729	R942
Entertainment	R543	R397	R356	R470	R595	R745
Souvenirs	R381	R503	R320	R452	R756	R900

Comparing 2010, 2011 and 2012, the average spend by non-residents increased across all spend items.

Estimated Economic Impact: Resident Participants



Year	Number	Margin of Error	Spend	Total
2007	3 792	*Middle Estimate	R281	R1 066 657
		**Low Estimate	R232	R879 589
		***High Estimate	R331	R1 253 725
2008	2 486	*Middle Estimate	R352	R874 475
		**Low Estimate	R245	R608 836
		***High Estimate	R459	R1 140 139
2009	2 580	*Middle Estimate	R261	R674 310
		**Low Estimate	R193	R497 043
		***High Estimate	R330	R851 577
2010	3806	*Middle estimate	R541	R2 059 609
		**Low Estimate	R375	R1 428 896
		***High Estimate	R707	R2 691 322
2011	4368	*Middle estimate	R260	R1 134 713
		**Low Estimate	R215	R937 005
		***High Estimate	R305	R1 332 421
2012	2821	*Middle estimate	R244	R688 275
		**Low Estimate	R352	R993 107
		***High Estimate	R460	R1 297 940

* 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.

Estimated Economic Impact: Non-Resident Participants



Zulu Kinadom. Exceptional

Year	Number	Margin of Error	Spend	Total
2007	2 862	*Middle Estimate	R1 993	R5 703 537
		**Low Estimate	R1 555	R4 449 981
		***High Estimate	R2 431	R6 957 093
2008	4 055	*Middle Estimate	R2 425	R9 834 308
		**Low Estimate	R2 059	R8 348 726
		***High Estimate	R2 792	R11 319 906
2009	5 237	*Middle Estimate	R1 311	R6 867 266
		**Low Estimate	R1 155	R6 049 400
		***High Estimate	R1 467	R7 685 131
2010	4 845	*Middle Estimate	R2 594	R12 566 285
		**Low Estimate	R1 982	R9 603 553
		***High Estimate	R3 205	R15 529 017
2011	4 196	*Middle Estimate	R3 089	R12 960 877
		**Low Estimate	R2 061	R8 647 189
		***High Estimate	R4 117	R17 274 566
2012	3 590	*Middle Estimate	R3 129	R11 233 110
		**Low Estimate	R4 127	R14 814 443
		***High Estimate	R5 125	R18 398 750

* 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

Estimated Economic Impact: Resident Spectators

* 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 number of spectators at the finishing point as observed by the research team.

Year	Number	Margin of Error	Spend	Total
2007	2 760	*Middle Estimate	R294	R811 761
		**Low Estimate	R161	R444 443
		***High Estimate	R427	R1 179 072
2008	1 920	*Middle Estimate	R297	R569 412
		**Low Estimate	R232	R445 075
		***High Estimate	R361	R693 734
2009	1 980	*Middle Estimate	R289	R572 418
		**Low Estimate	R203	R402 083
		***High Estimate	R375	R742 753
2010	<i>Omitted due to the use of different trial methodology</i>	-	-	-
2011	1 060	*Middle Estimate	R234	R247 828
		**Low Estimate	R193	R204 258
		***High Estimate	R275	R291 398
2012	1 550	*Middle Estimate	R269	R417 446
		**Low Estimate	R444	R687 813
		***High Estimate	R618	R958 179

Estimated Economic Impact: Non-Resident Spectators



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

Year	Number	Margin of Error	Spend	Total
2007	1 240	*Middle Estimate	R1 490	R1 847 600
		**Low Estimate	R639	R791 901
		***High Estimate	R2 341	R2 903 299
2008	1 080	*Middle Estimate	R2 316	R2 501 280
		**Low Estimate	R1 359	R1 467 342
		***High Estimate	R3 273	R3 535 218
2009	1 020	*Middle Estimate	R1 161	R1 184 322
		**Low Estimate	R678	R691 126
		***High Estimate	R1 645	R1 677 518
2010	<i>Omitted due to the use of different trial methodology</i>	-	-	-
2011	940	*Middle Estimate	R2 110	R1 983 118
		**Low Estimate	R1 438	R1 352 015
		***High Estimate	R2 782	R2 614 221
2012	760	*Middle Estimate	R2 005	R1 523 689
		**Low Estimate	R3 171	R2 410 076
		***High Estimate	R4 337	R3 296 464

These are based on the number of spectators at the finishing point as observed by the research team.

Additional Spend and Employment



	2012
Logistics - start and finish setup and transport of bikes	R2 758 959
Catering, marketing etc	R700 000
Employment:	
Marshals	295
Registration workers	30
Start at PMB	24
Start at Hillcrest	15
Pamphlet distributors	12
Daily workers for 5 days	10
Route managers	40
Water point workers	100

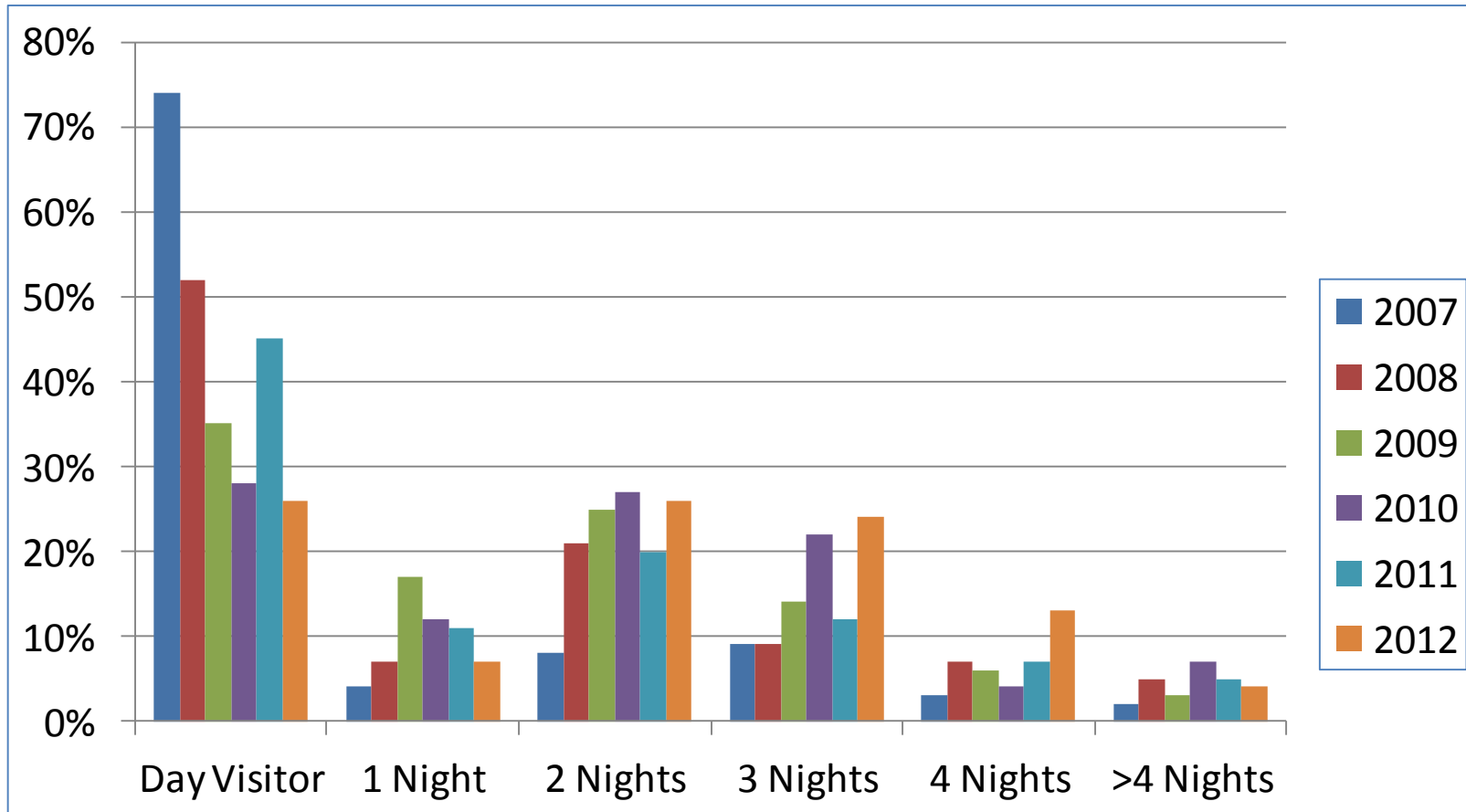
Estimated Total Economic Impact: Participants and Spectators



	2009	2011	2012
*Direct Spend	Between R 6 740 526 and R9 362 650	Between R9 999 204 and R19 888 787	Between R12 756 800 And R21 695 214
Total Spend	Between R9 571 547 and R13 294 963	Between R14 198 869 and R28 242 078	Between R18 144 656 and R 30 807 204
Organizers' Spend			R2 614 484
Estimated benefit to KZN			Between R20 759 140 and R33 421 688

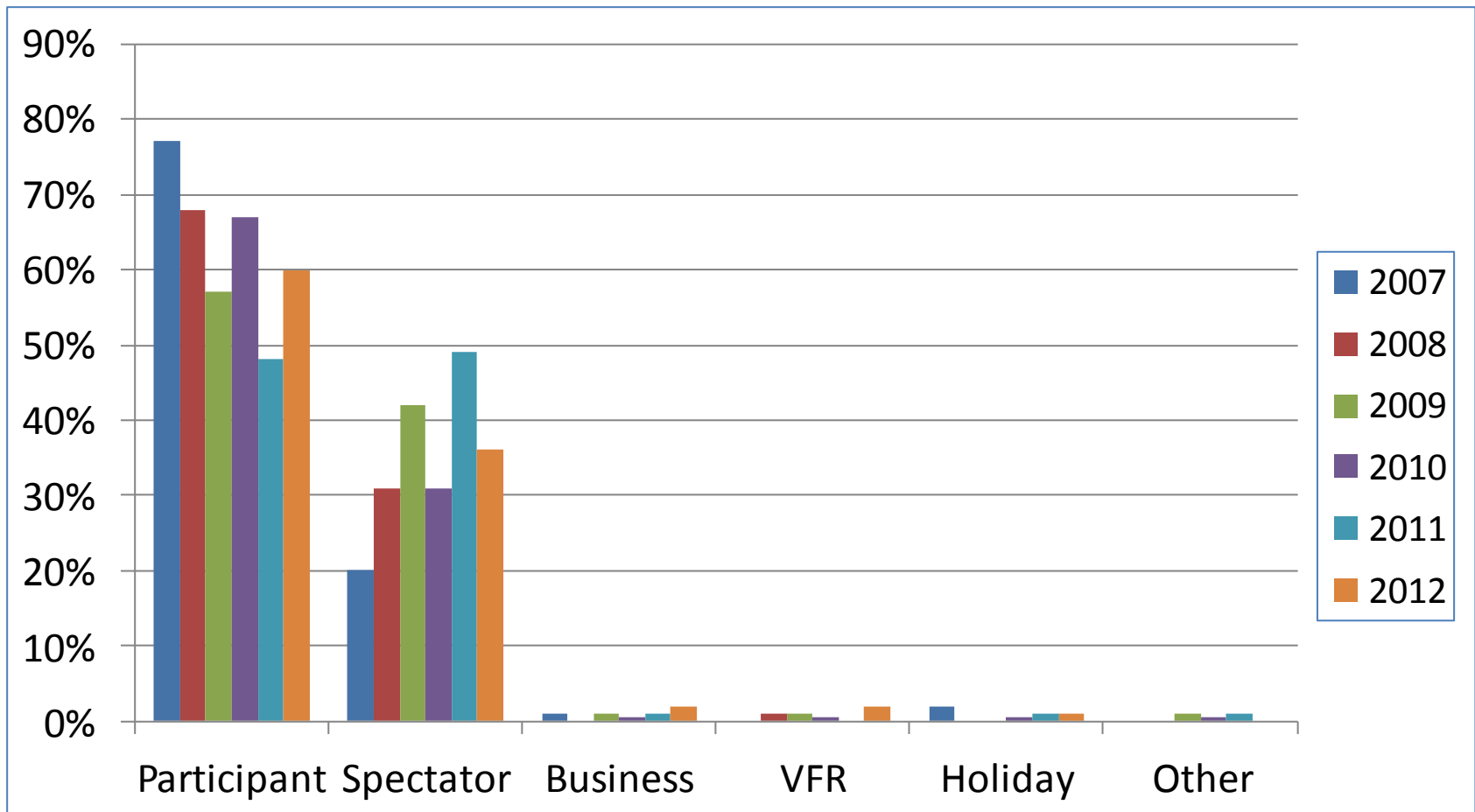
*Note: The direct spend was calculated by using the non-resident spend only. Only 75% of the organizers' spend was considered to be spent in KZN. This accounts for spend that leaves the province, such as prize money and time keeping equipment.

Length of stay



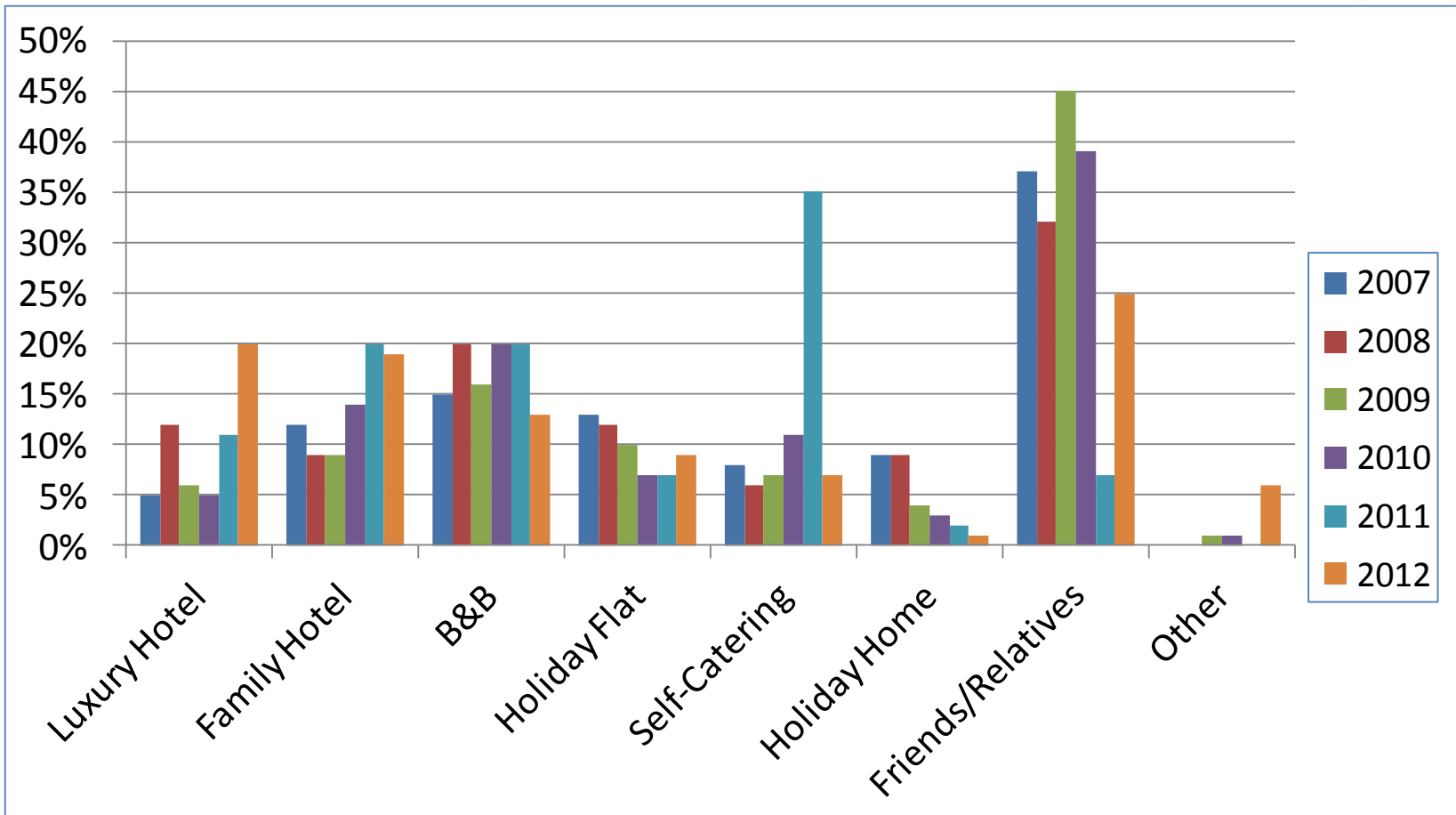
A Z-test could not be run to determine whether the difference between the two independent sample proportions (2011 and 2012) that pertain to 'day visitors' was statistically significant or not. The responses were below the minimum number required to calculate such a test. However, it appears that people staying between 2, 3 and 4 nights have increased. The possible reason for this is that people have more disposable income and opted to stay longer.

Primary reason for visiting area where event is taking place?



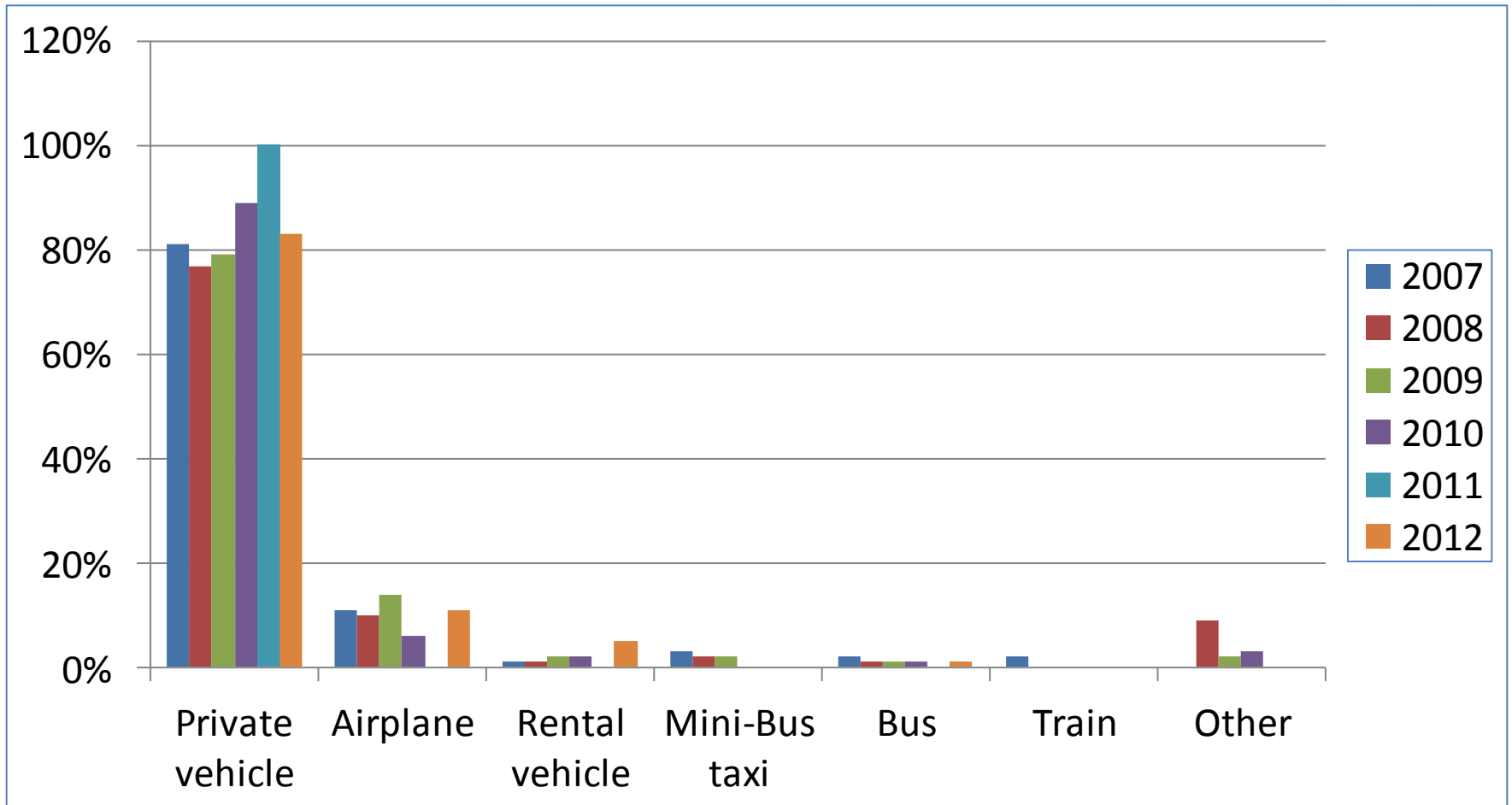
This graph indicates that more cyclists were interviewed in 2012 when compared to 2011.

Accommodation: non-residents



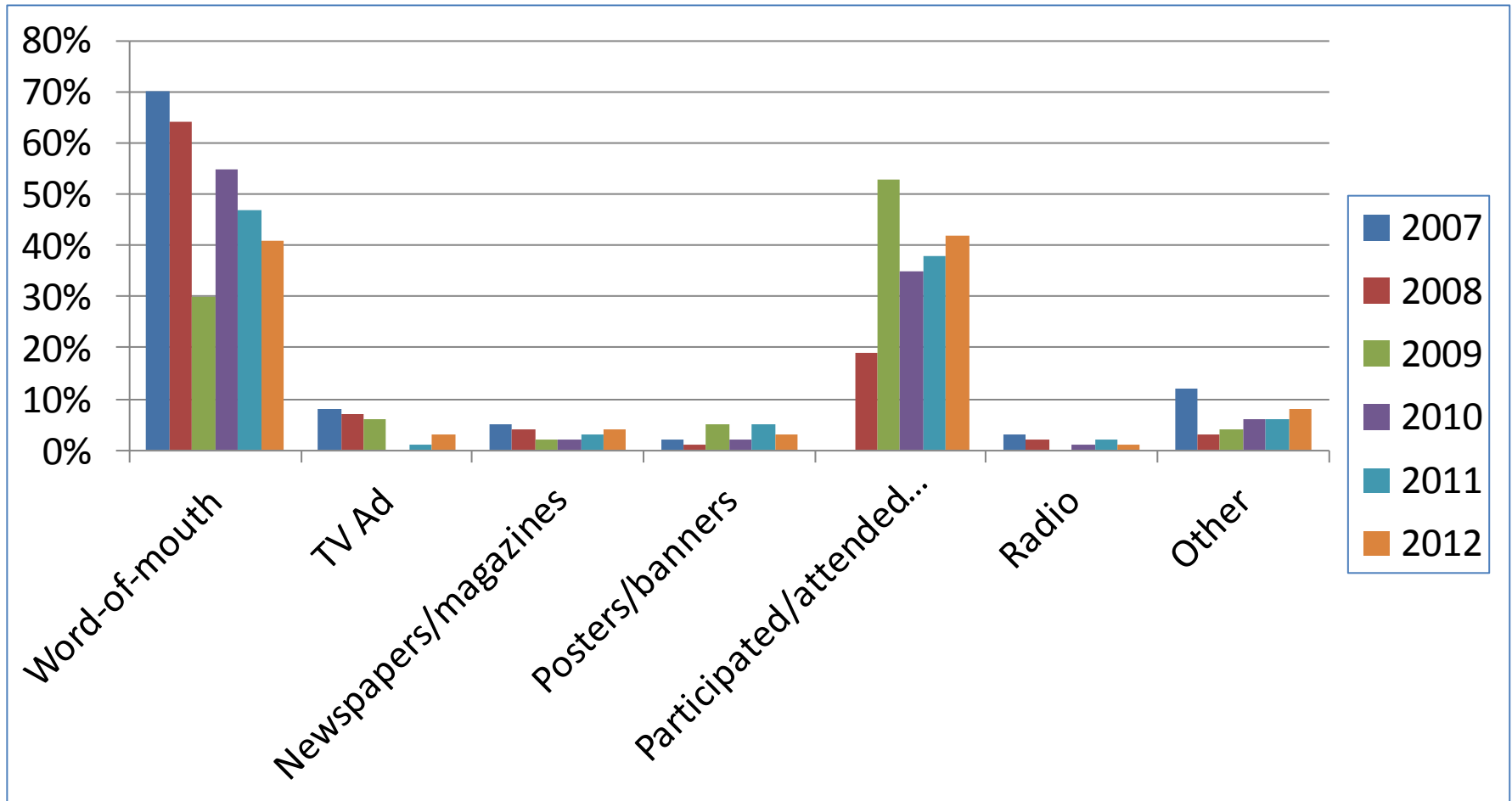
A Z-test could not be run to determine whether the difference between the two independent sample proportions (2011 and 2012) that pertain to 'friends and relatives' was statistically significant or not. The responses were below the minimum number required to calculate such a test. However, it appears that the majority of non-resident respondents stayed in accommodation establishments and with friends and relatives. They also stayed for a longer period as highlighted previously. This could suggest an improvement in economic conditions.

Transport to Event: non-residents



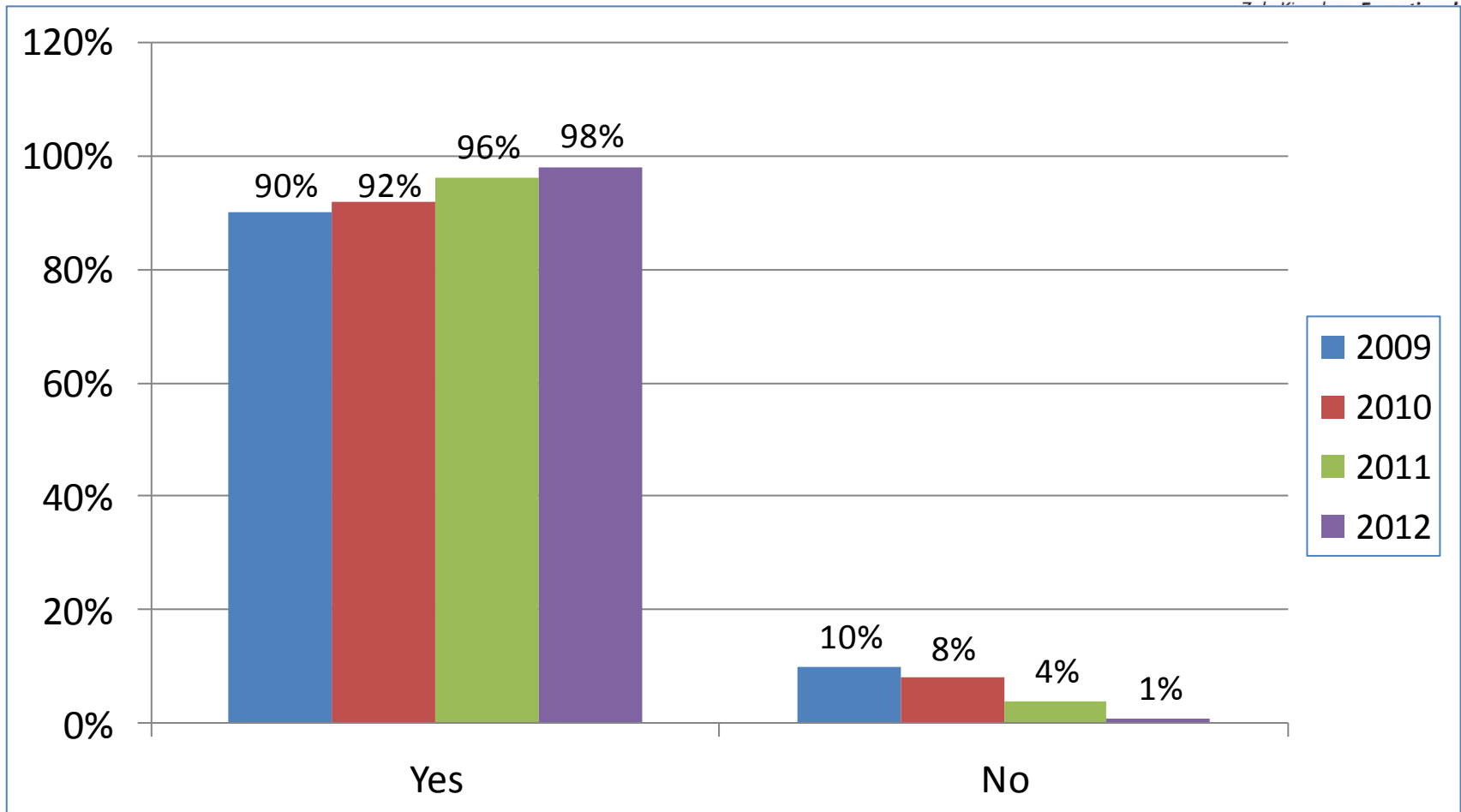
A Z-test indicated that there was statistically significant difference between the two independent sample proportions pertaining to 'private vehicle' when comparing 2011 and 2012.

Influenced to attend?

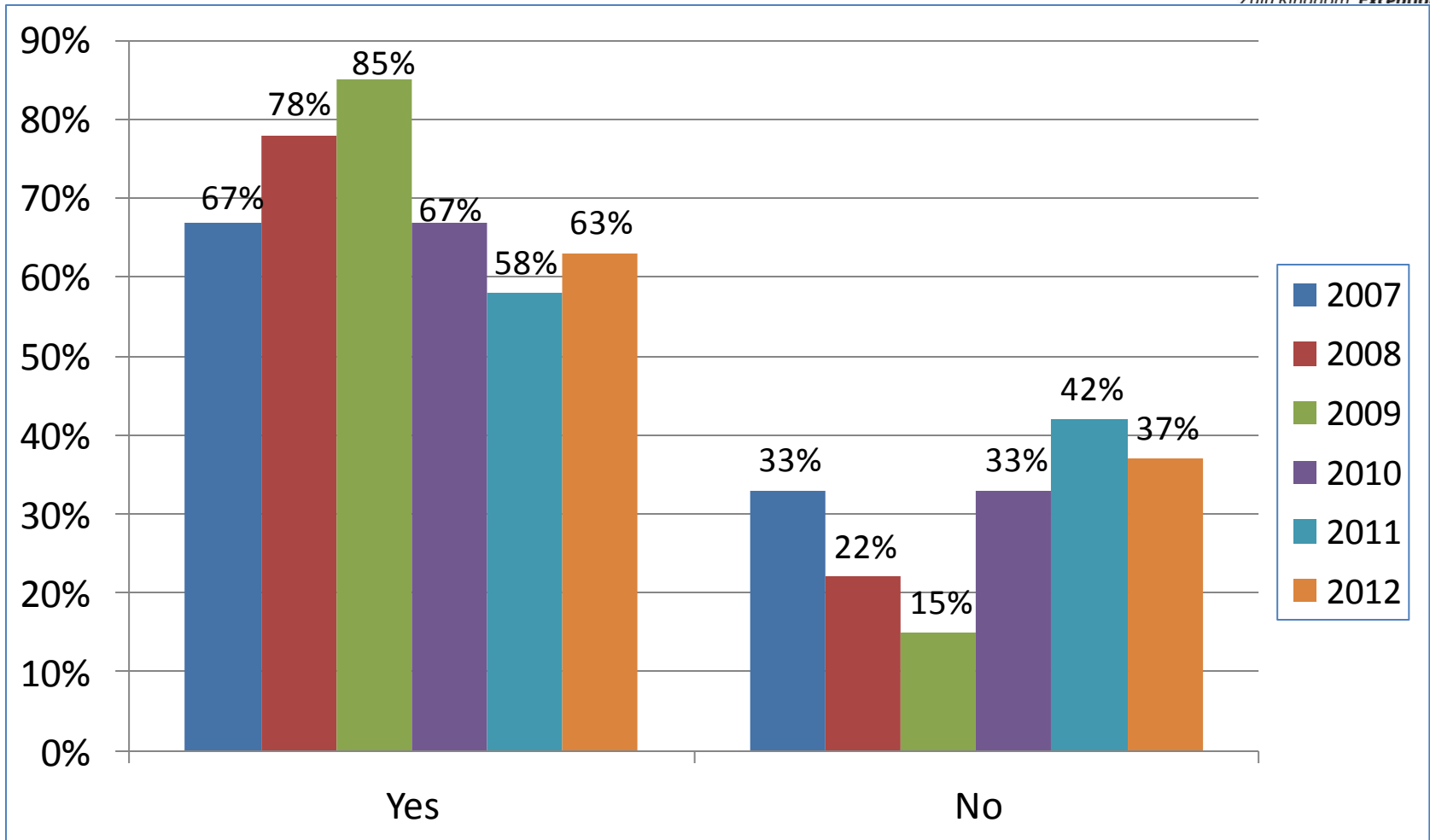


A Z-test indicated that there was no statistically significant difference between the two independent sample proportions pertaining to 'word-of-mouth' and 'previously attended' as an influencing factor when comparing 2011 and 2012. Despite this, it appears that the main factors which influenced attendance/participation was 'word-of-mouth' and 'previous attendance'.

Satisfied with information?



Attend in previous years?



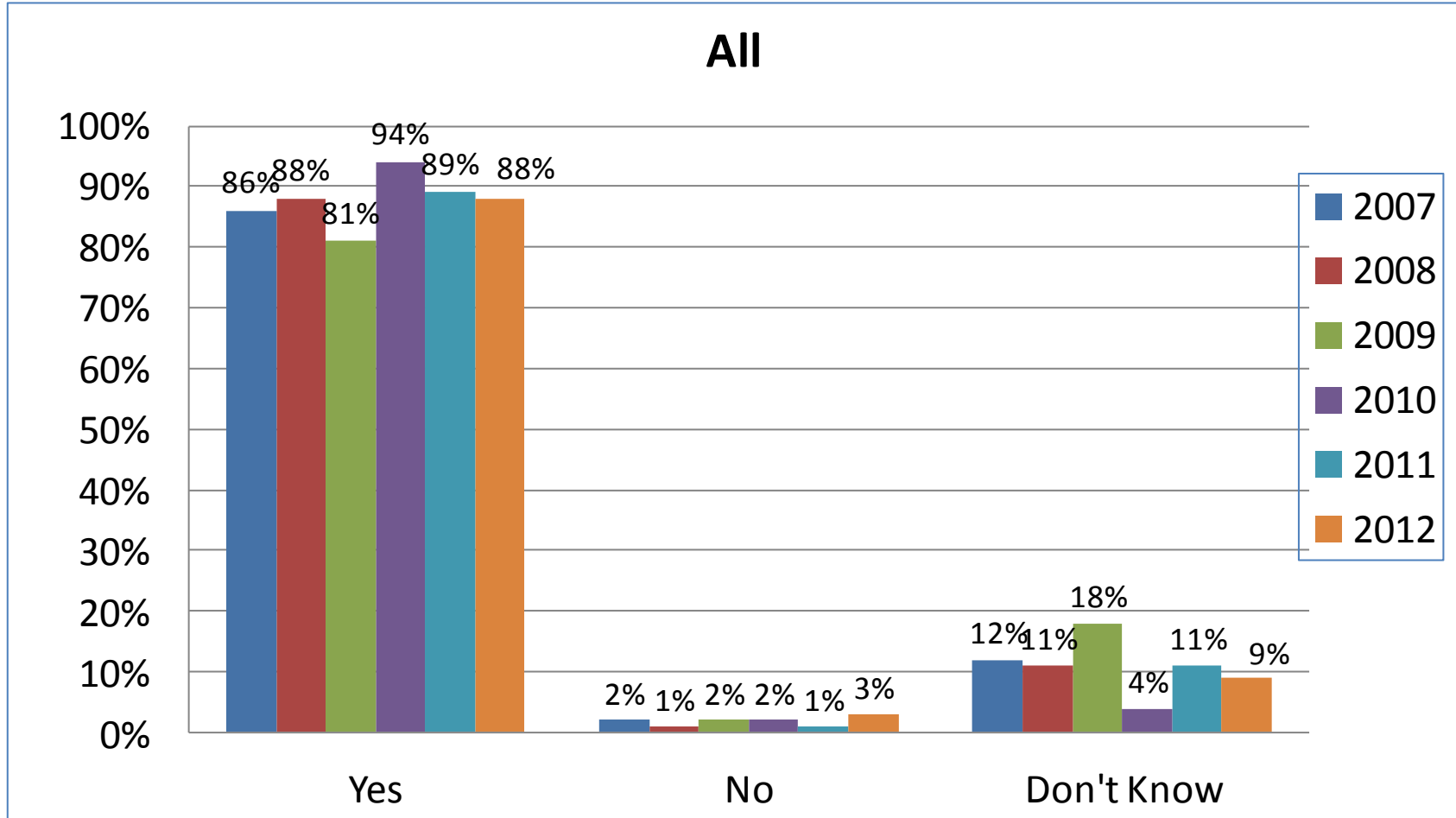
A Z-test indicated that there was no statistically significant difference between the two independent sample proportions pertaining to those who had attended the event in previous years when comparing 2011 and 2012.

Event Marketing Improvements



SUGGESTIONS	COUNT
Fantastic marketing/its fine/good	85
Better publicity can be made on radio and TV	25
Advertise it earlier	5
Market more on newspaper	5
Market outside province	5
Advertise more on the internet	3
More sponsors	3
It need to be also publicized in black communities.	2
Make it more visible in other events	2
Market on social networks	2
More banners, advertising	2

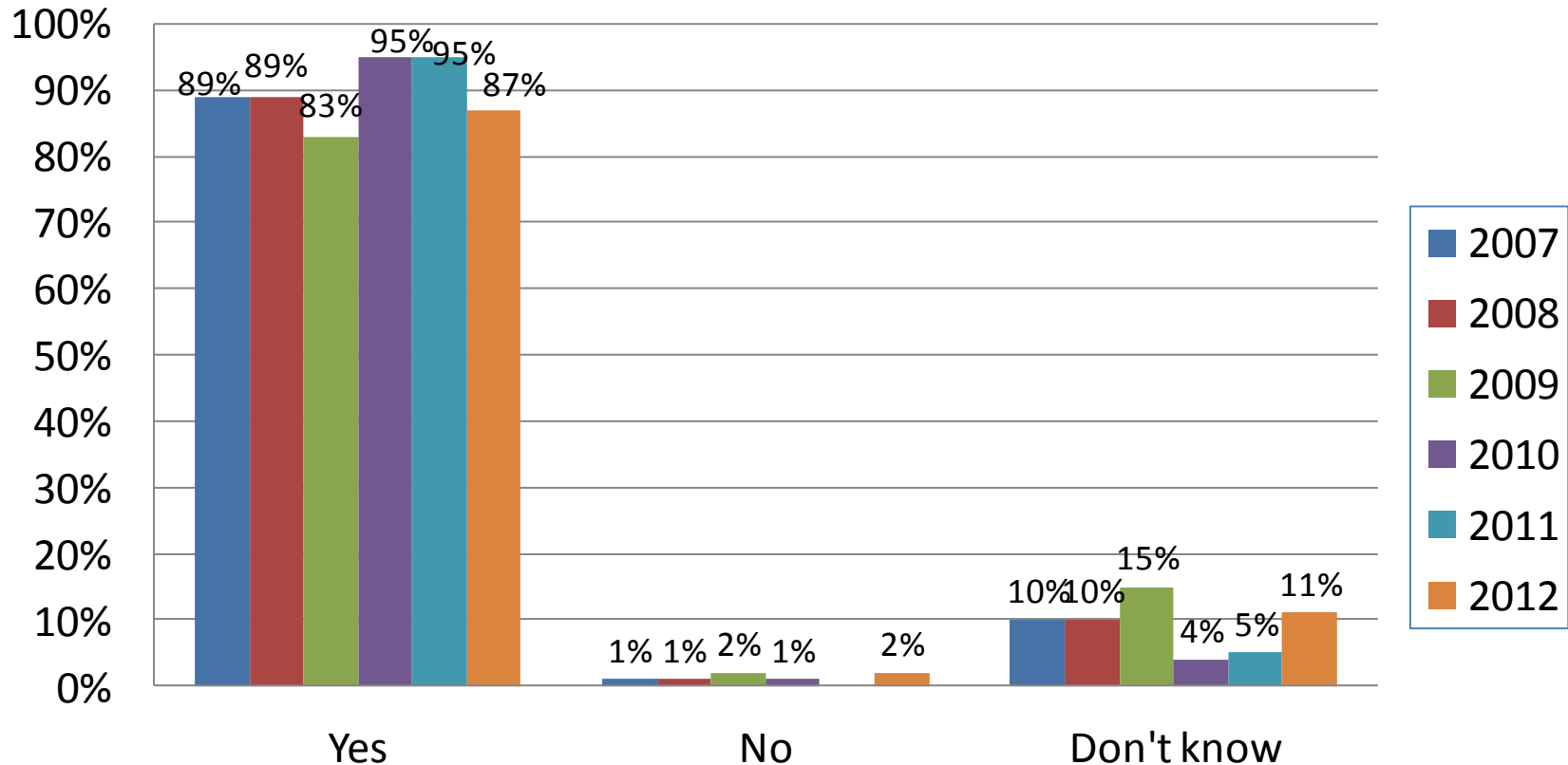
Attend again?



A Z-test indicated that there was no statistically significant difference between the two independent sample proportions pertaining to those who would attend the event again when comparing 2011 and 2012.

Attend again?

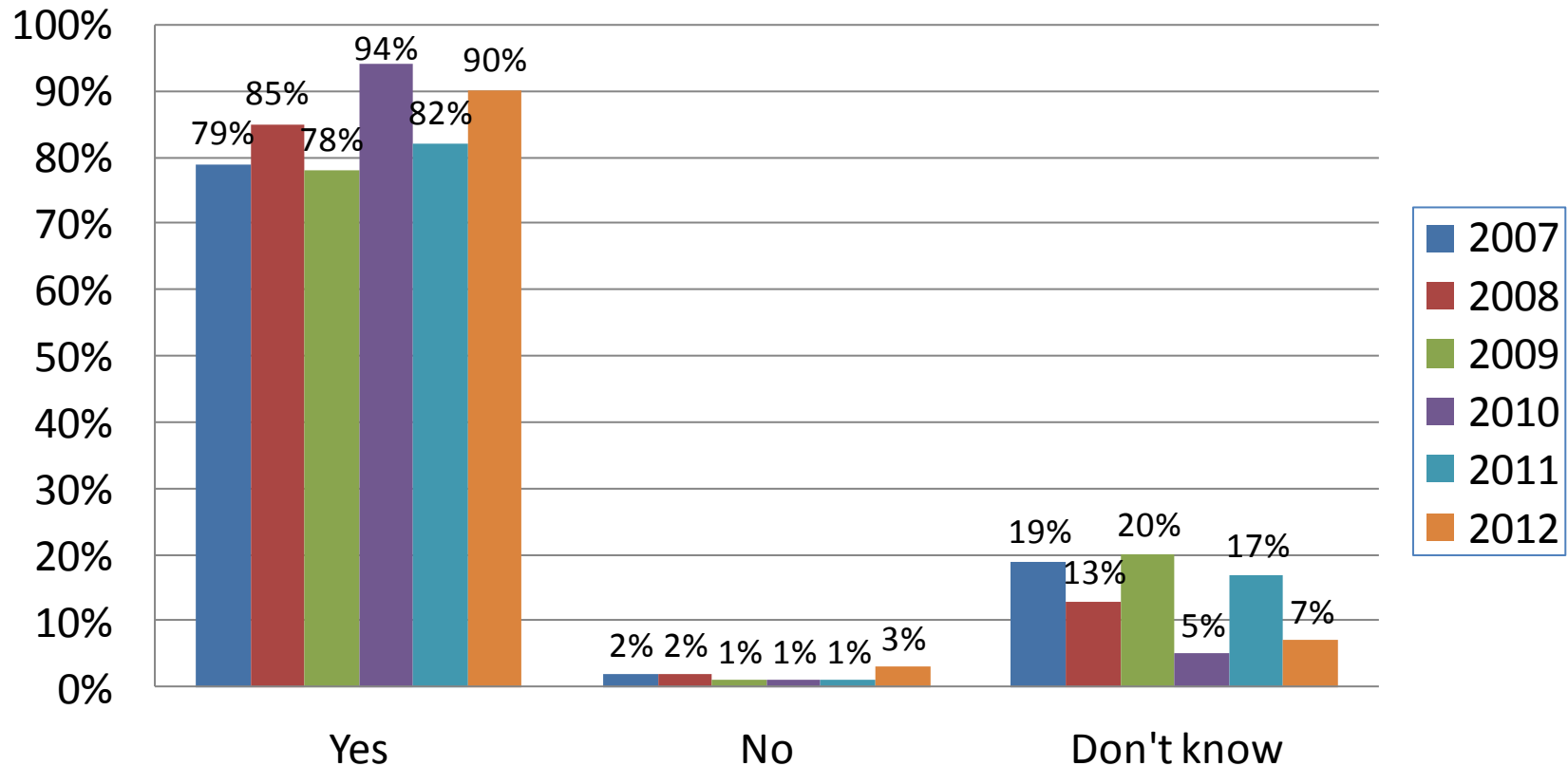
Participants



A Z-Test revealed no statistical difference between 2011 and 2012 of participants who indicated that they would attend again.

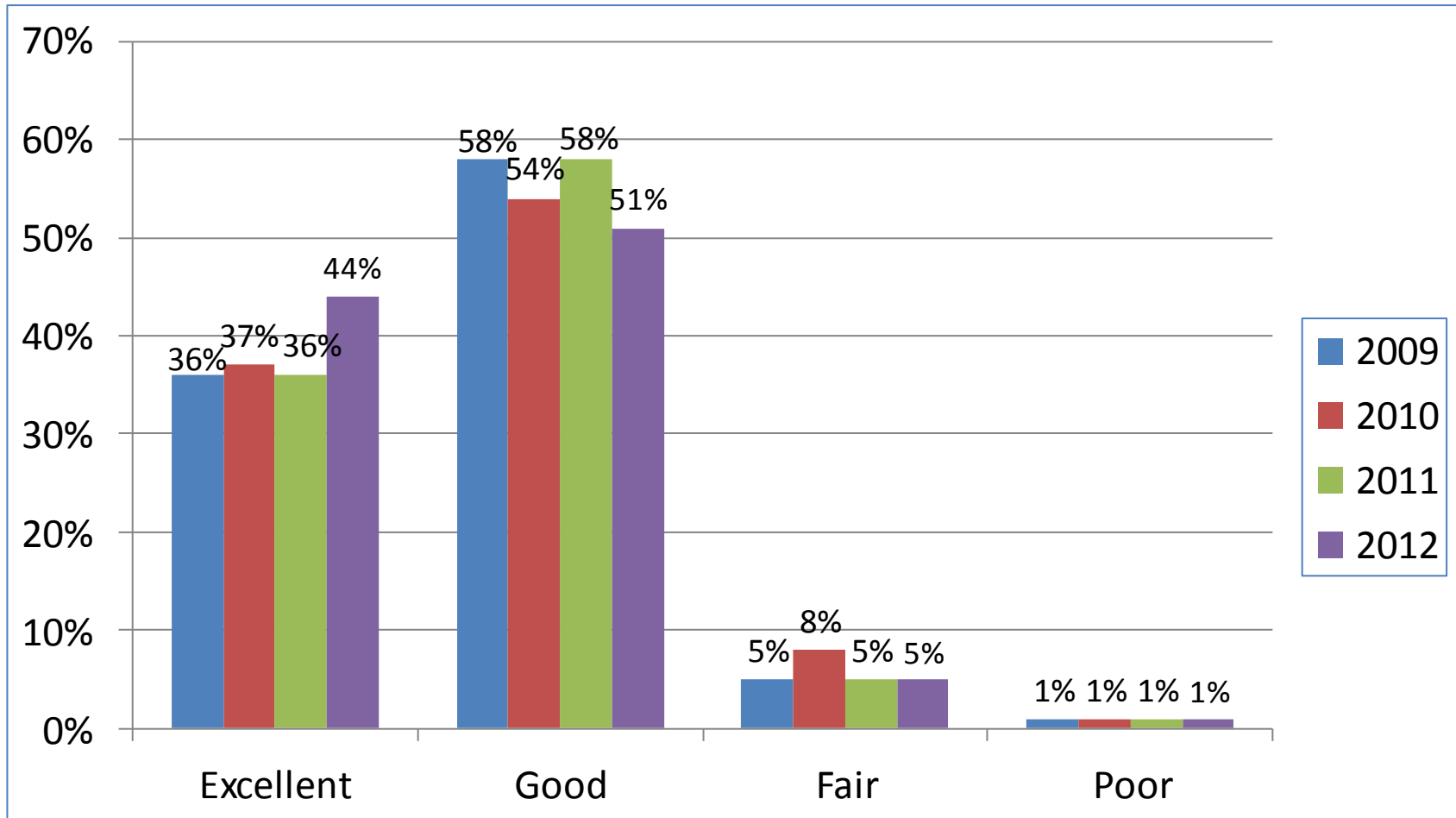
Attend again?

Spectators



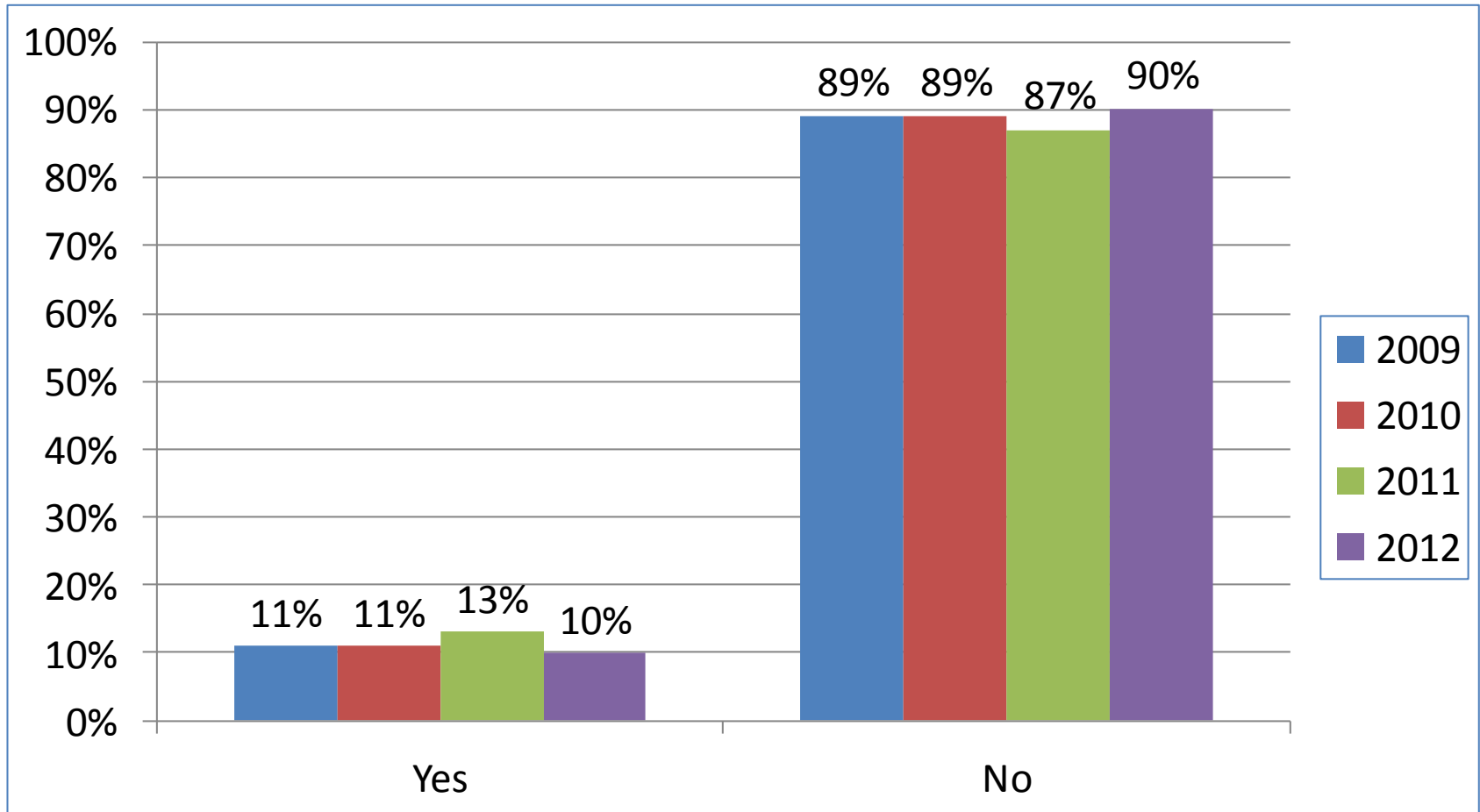
A Z-test indicated that there was no statistically significant difference between the two independent sample proportions pertaining to the spectators who would attend the event again when comparing 2011 and 2012.

Experience Rating



A Z-Test revealed no statistical difference in the increase of respondents who indicated that the event was excellent when comparing 2011 and 2012.

Experienced problems at the event?



Very few respondents experienced any problems at the event. Mentions of what types problems were experienced are found on the following slide.

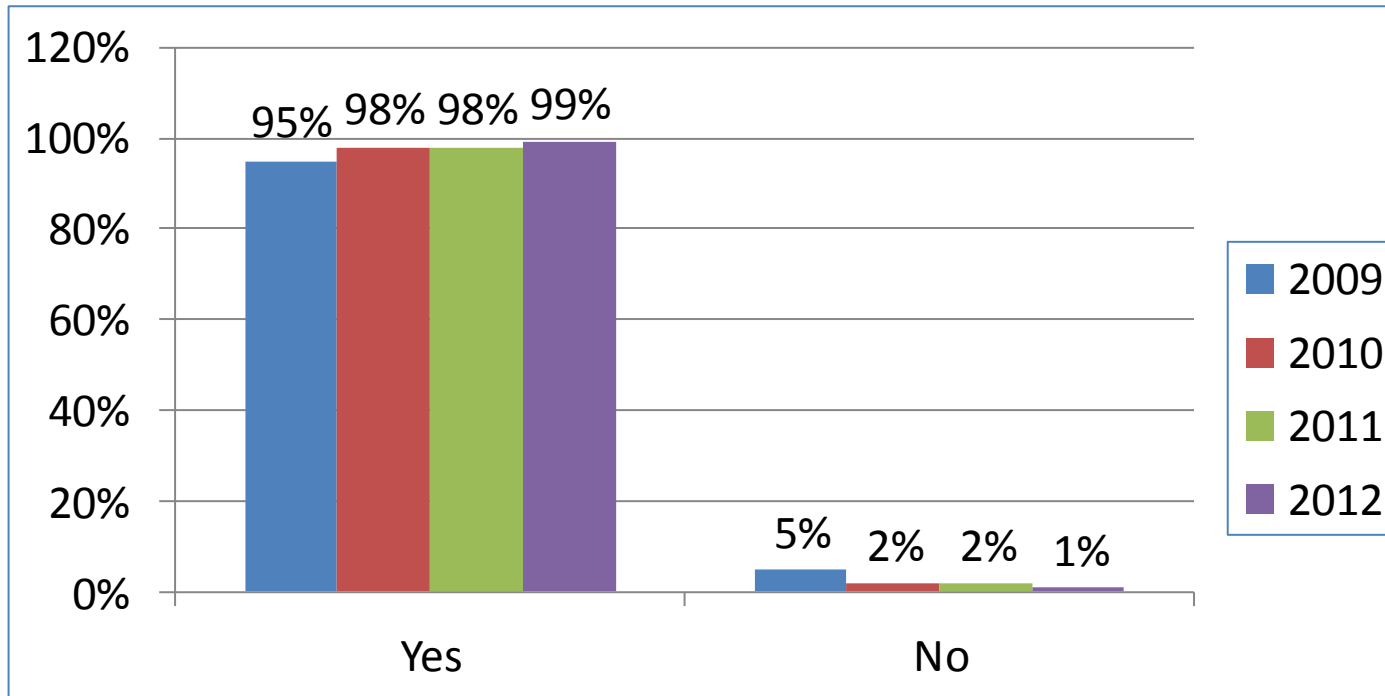
Problems Experienced



The problems that were experienced by the respondents were:

- No shade.
- Couldn't find way out of Durban. Confusion of where to go.
- Struggles to find bicycle park.
- More Sponsors needed
- More gifts and goodie bags
- Better expo
- Improve parking and signage
- More water points

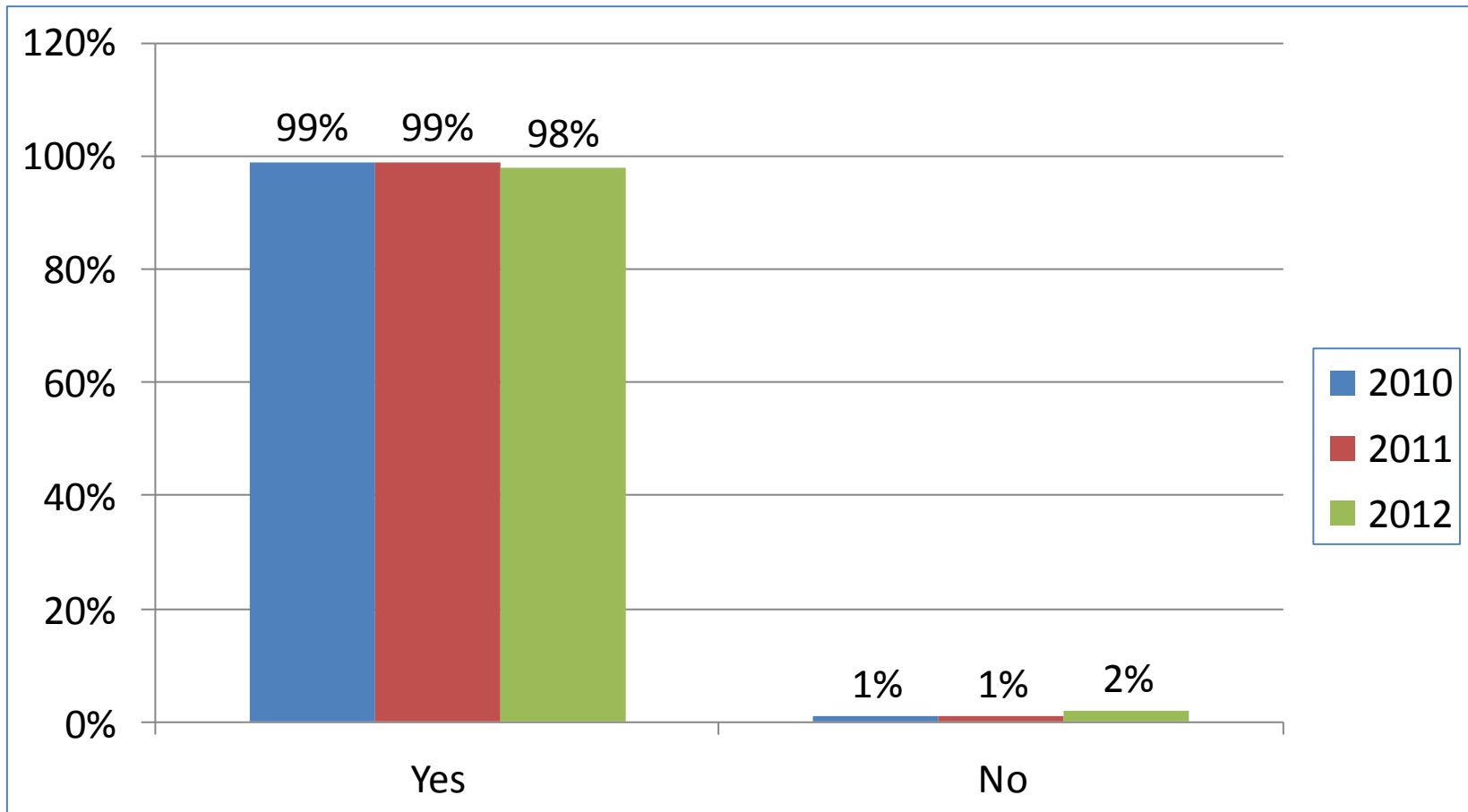
Recommend the Event to Family & Friends?



REASONS FOR RECOMMENDING THE EVENT

- Family event
- Exciting/fun/enjoyable outdoor event
- It a well organized event
- For good health and fitness purposes
- Good event

Recommend KZN as a Tourist Destination to Family & Friends?



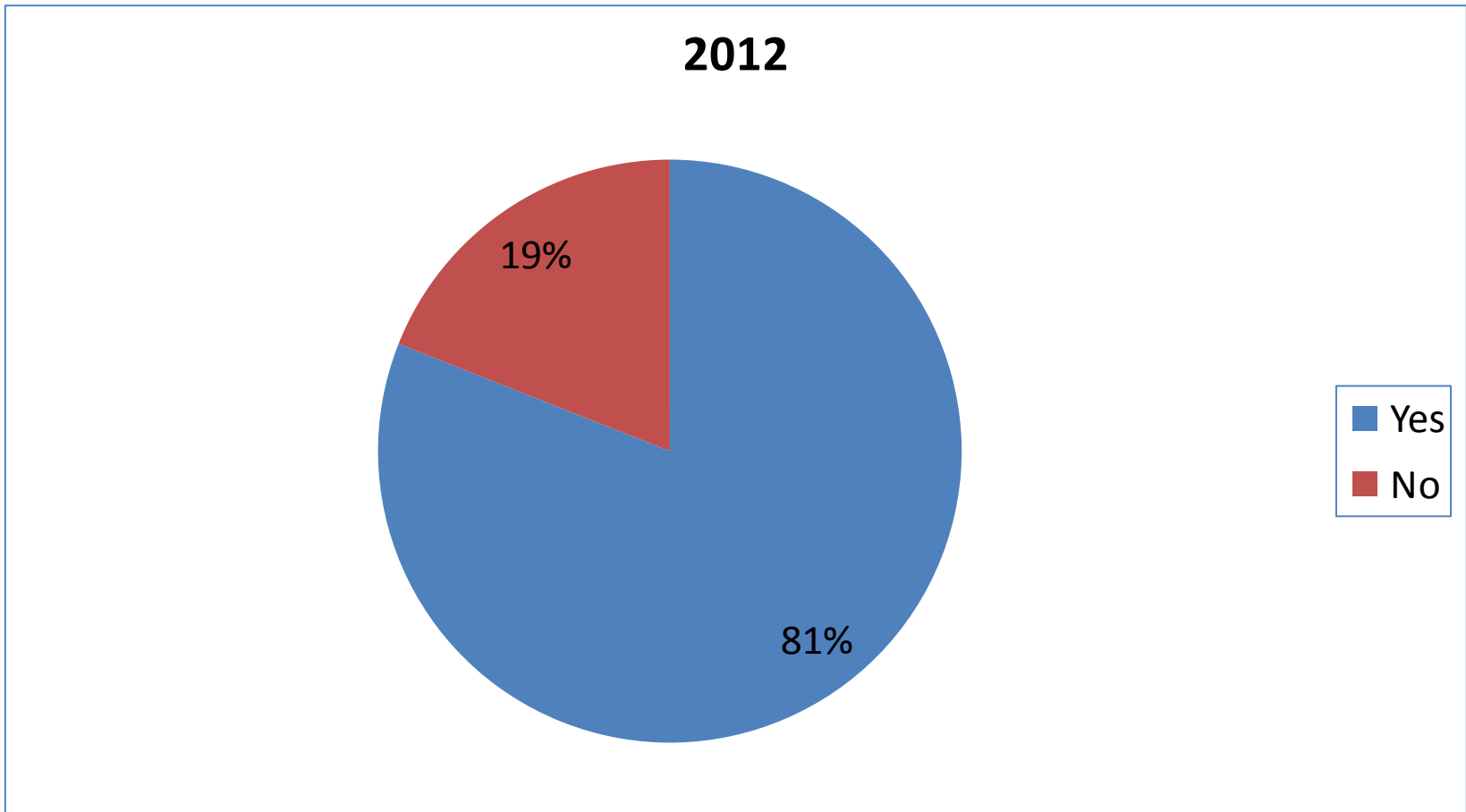
Reasons for Recommending KZN



The reasons for recommending KZN to friends & family as a tourist destination were highlighted as:

- Beach/sea
- Beautiful province/scenery
- Friendly people
- Great place
- Good climate/weather
- Good holiday destination
- Lots of activities to do.

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



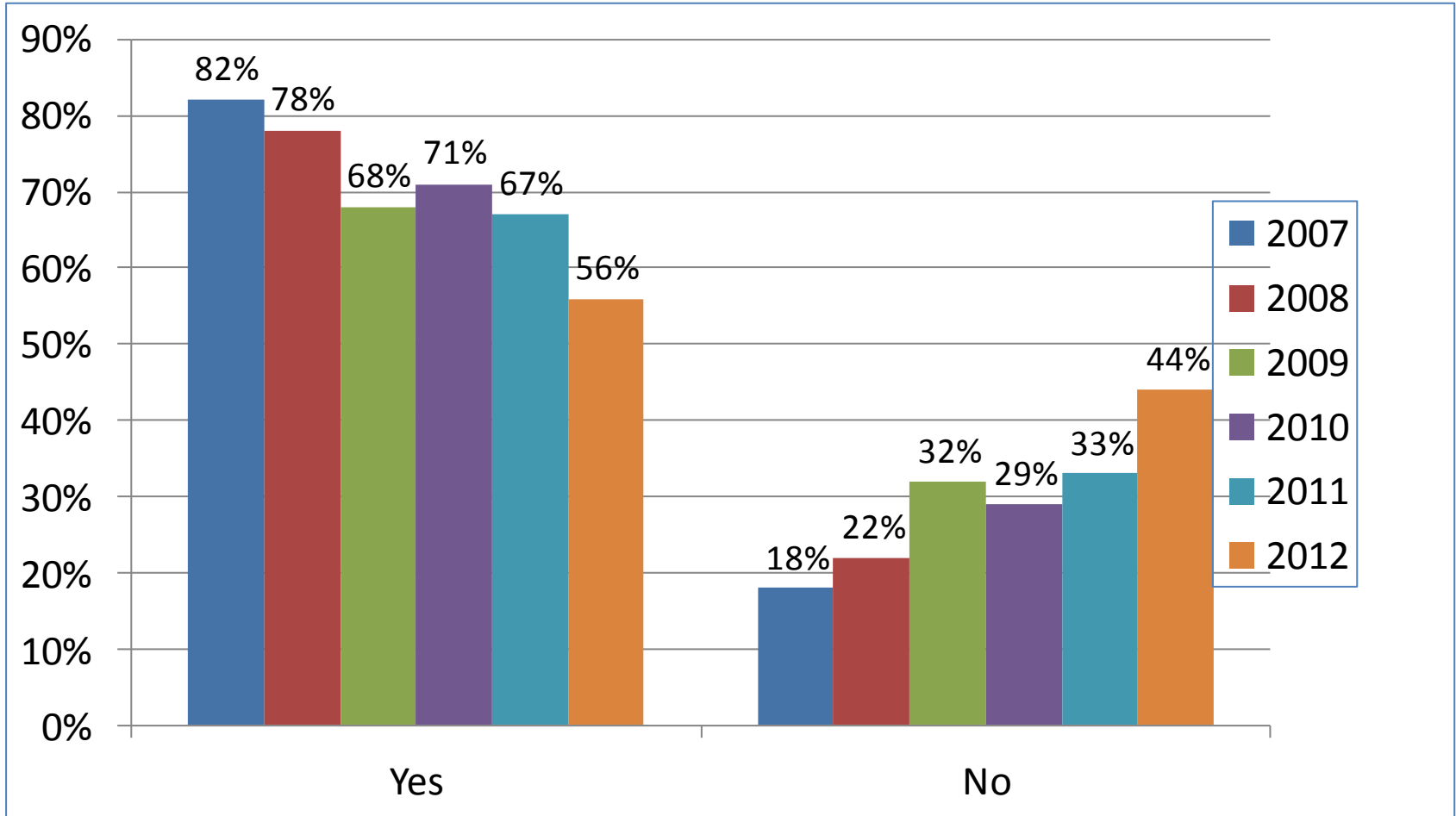
Reasons for planning to visit KZN



The reasons for recommending KZN to friends & family as a tourist destination were highlighted as:

- Beach/sea
- Holiday/weekend
- Family and friends stay here
- Beautiful places
- Good weather

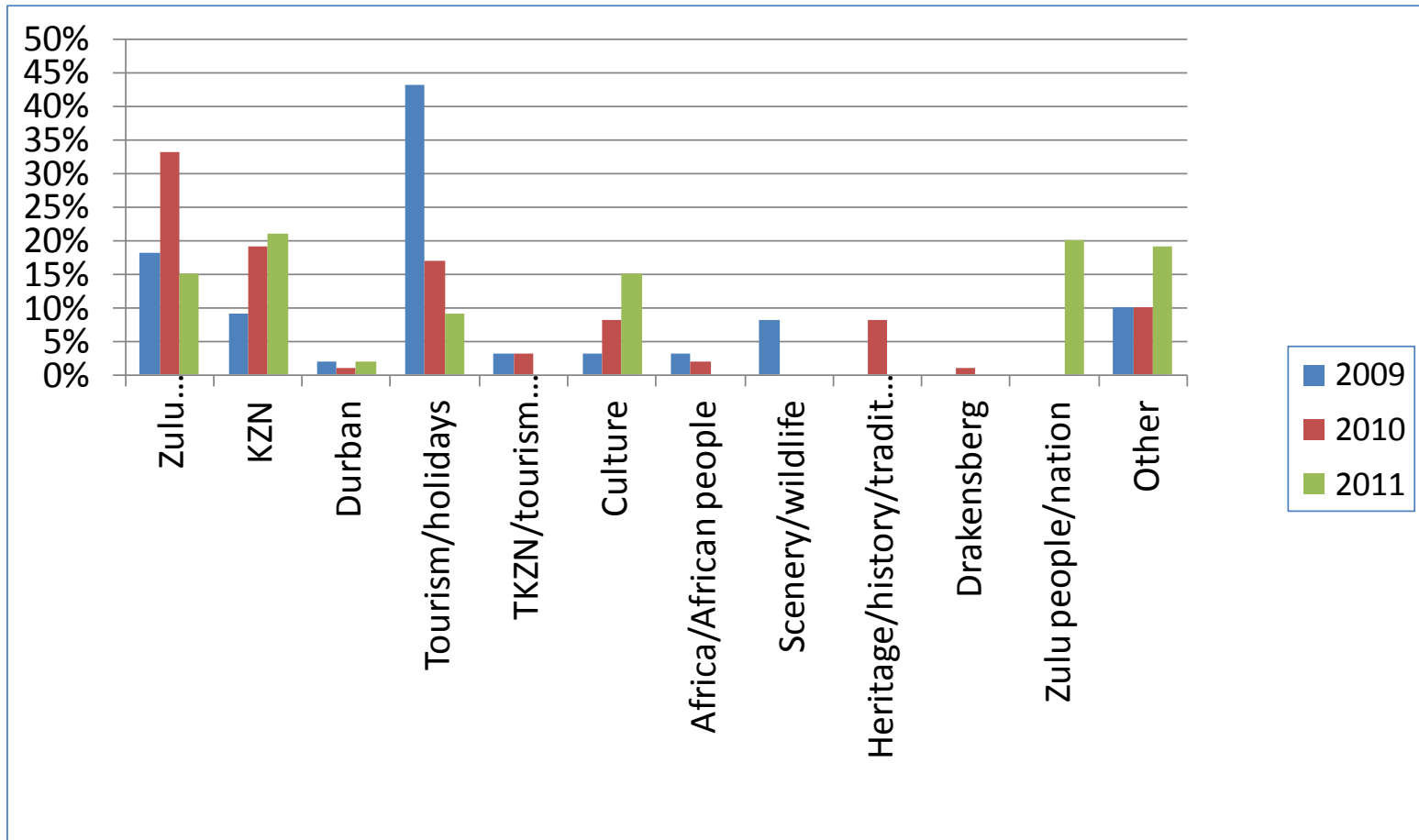
Familiar with TKZN's slogan?



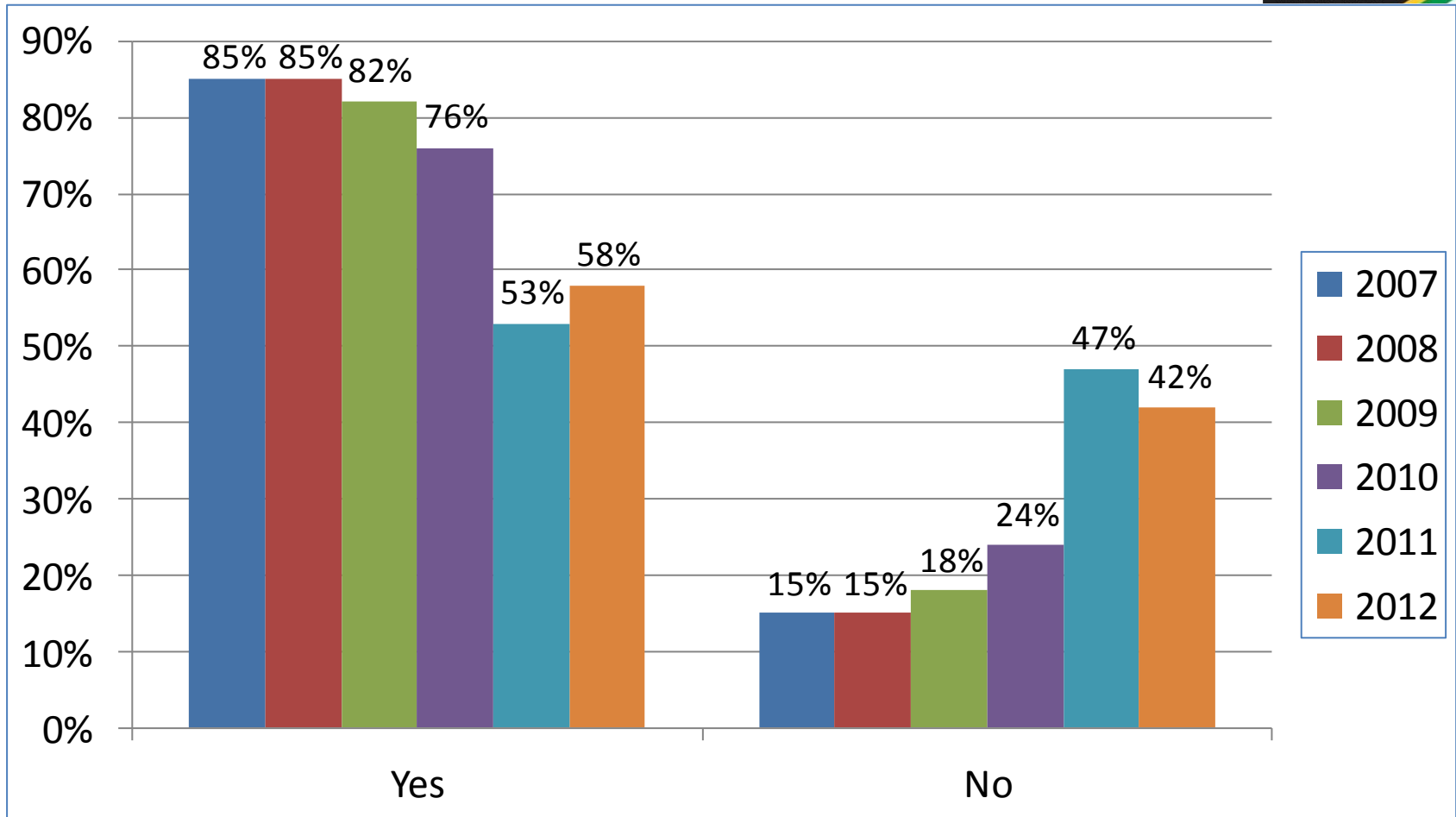
Although the graph indicates in the percentage of respondents who recognized TKZN's slogan, a Z-test indicated that there was no statistically significant difference between the two independent sample proportions pertaining to those who were familiar with the slogan when comparing 2011 and 2012.

Associations – TKZN’s slogan

Core Mentions

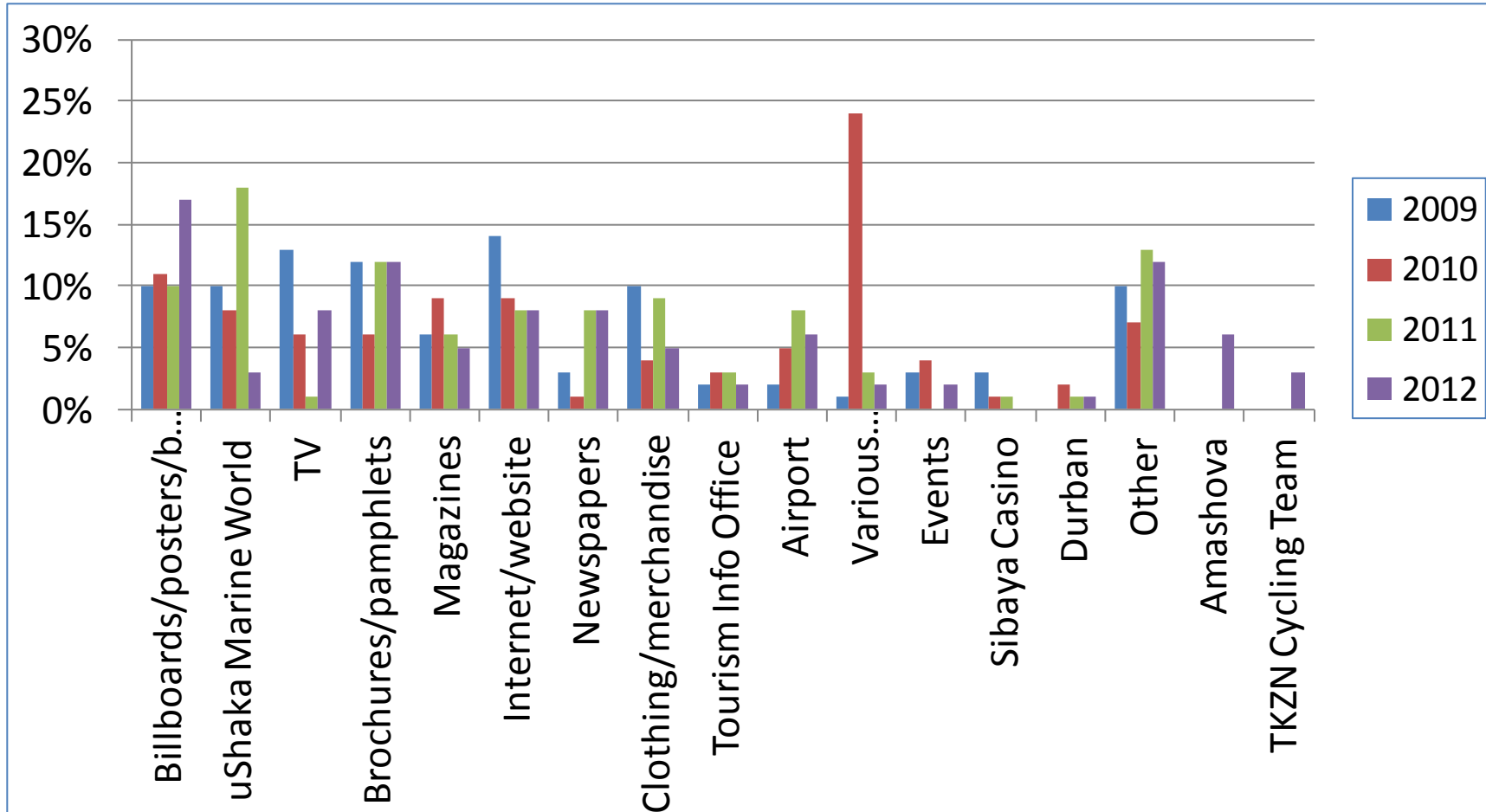


Noted TKZN's logo?



A Z-test indicated that there was no statistically significant difference between the two independent sample proportions pertaining to the noting of the logo when comparing 2011 and 2012. It is important to note that this was a new logo that was being tested. Although more people noted the new logo it was not statistically significant.

Where TKZN's logo noted?



Main Findings



1. The year 2012 experienced the highest number of entrants. Both the 40km and the 106km races had increased participants when compared to 2011
2. The number of foreign entrants was the highest since 2008. 19 cyclists came from Swaziland, 11 from the UK, 4 from the Netherlands and 3 from Dubai. This indicates that the race organizers are having success in promoting the event on a wider scale.
3. On a domestic front, the 2012 there were 21 more cyclists from Gauteng and 852 more from KwaZulu-Natal enter the 40km and 106km races. Added with the increase of international cyclists it seems that this race is growing in popularity and is getting good KZN support.
4. The average group size has increased to 3.4 from 2.8 in 2011. This also confirms that increased number of people attending the event.
5. Further confirmation of the success of the event from a tourism perspective is that the average spend has increased to R2 071 from R1 729 in 2011.
6. The total economic impact is estimated to be in the region of between R18mn and R30mn. In addition the organizers spent almost R3.5mn on the logistics and marketing of the event.

Main Findings (cont'd)



7. In terms of accommodation for non-residents, this research showed an increase in the use of luxury hotels and staying with VFR. However, a Z-test could not be run to determine whether the difference between the two independent sample proportions was statistically significant or not as the responses were below the minimum number required to do such a test.
8. There also seemed to be an increase in the number of respondents who stayed 2, 3 and 4 nights. However, a Z-test could not be run to determine whether the difference between the two independent sample proportions was statistically significant or not as the responses were below the minimum number required to do such a test.
9. Points 4,5, 7 and 8 show that respondents seem to be spending more and are more confident about the economy. The Bureau of Economic Research indicated that the Consumer Index for the Q3 improved slightly from -3 to -1. This bodes well for the summer holidays which are around the corner.
10. In terms of attending the event, this research showed that respondents were largely influenced by word-of-mouth as well as the fact that they had either participated in or attended the event in previous years. This provides an indication that people have positive views about the event.
11. Over 97% of respondents were satisfied with information that was provided regarding the event. This was information that was reflected/highlighted in various media. It shows that the organisers have been communicating well with participants.

Main Findings (cont'd)



12. A large proportion (63%) of the respondents had attended the event in previous years. This supports that people have positive views about the event to such an extent that they attend again. It also supports the positive influence that word-of-mouth has in influencing people to attend the event as mentioned previously.
13. Marketing of the event seemed to have been undertaken well as indicated by the large proportion of respondents. In terms of marketing improvements, the respondents were of the view that more radio and TV coverage, advertise early and outside the province at other events was needed as well as the use of different forms of media.
14. The majority of participants (87%) said they would attend the event again in future. This further supports the positive views that are held regarding the event. More spectators (90%) also indicated that they would attend the event again. This all bodes well for the event and tourism into the province.

Main Findings (cont'd)



Zulu Kingdom. Exceptional

15. 90% of respondents did not experience problems at the event. However, the problems that were experienced were cited as:
 - No shade
 - Couldn't find way out of Durban.
 - Struggles to find bicycle park
 - Provide riders with more gifts/goodie bags
 - Better Expo
 - More water points
16. 99% of respondents would recommend the event for the following reasons:
 - Family event
 - Exciting/fun/enjoyable outdoor event
 - It is a well organized event
 - Good for health and fitness purposes
 - Good event
- 17/. 98% of respondents said they would recommend KZN as a tourist destination to family and friends for the following reasons:
 - Beach/sea
 - Beautiful province
 - Friendly people
 - Great place
 - Good climate/weather
 - Good holiday destination
 - Lots to do

Main Findings (cont'd)



18. 81% of the respondents plan to visit KwaZulu-Natal in the next 12 months for a holiday. The reasons are:

- Beach/sea

- Family and friends stay here

- Beautiful places

- Go to the Drakensberg

- Have a holiday home

19. There was a slight increase in the noting of the Zulu Kingdom logo from 53% in 2011 to 58% in 2011. It is important to note that this was the new logo that was tested. This suggests the logo is becoming more recognised.

Recommendations



1. Although there was a 'beer garden' available respondents still asked for more shade. This may be because the 'beer garden' was not situated close to the finish where people could watch the finish and still have shade. It may be advisable to have umbrellas for hire.
2. The organizers may have to review the holding of an expo for next year. There seems to have been an expectation of an expo.
3. The recognition of the TKZN logo has improved, but work still needs to be done to reach the recognition levels of the previous logo. This could be done by adding the logo onto the entry forms.
4. Overall the events seemed to have been well organized and a success both from a tourism and event perspective.
5. The organizers need to improve the number of international participants. To assist in achieving this, it is suggested that the event be marketed at other international cycle events.
6. It is suggested that the event maintains International Cycling Union status (ICU).