

THE 2015 KARKLOOF MTB FESTIVAL



Top Line Summary Report



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Tourism KwaZulu-Natal
July 2015

Positive Highlights



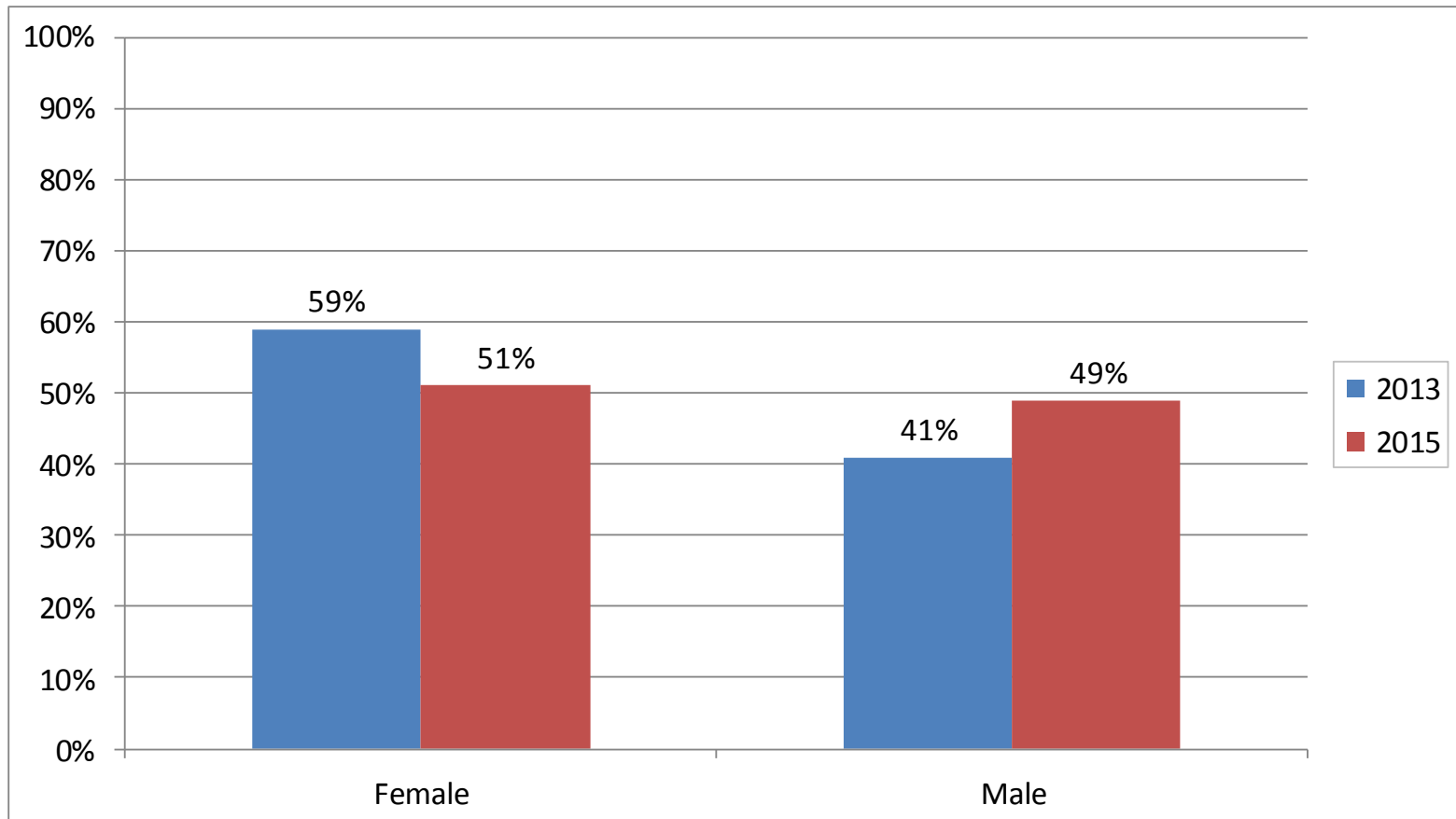
- 94% of the participants and 90% of spectators said they would attend the event again
- 95% of the respondents either had a “good” or an “excellent” experience at the event
- 91% of those interviewed did not experience any problems at the event
- 99% of the respondents were satisfied with information that was provided prior to the event
- 100% of the respondents would recommend the event to family and friends
- 100% also said they would recommend KZN as a tourist destination
- 72% of the respondents had noted the TKZN logo despite the fact that there was little or no TKZN branding at the event
- 73% of the respondents were either day or overnight visitors which has positive implications to the area’s economy as they spend more than the local residents
- The economic impact of the event has increased by a significant amount since the 2013 survey

Methodology



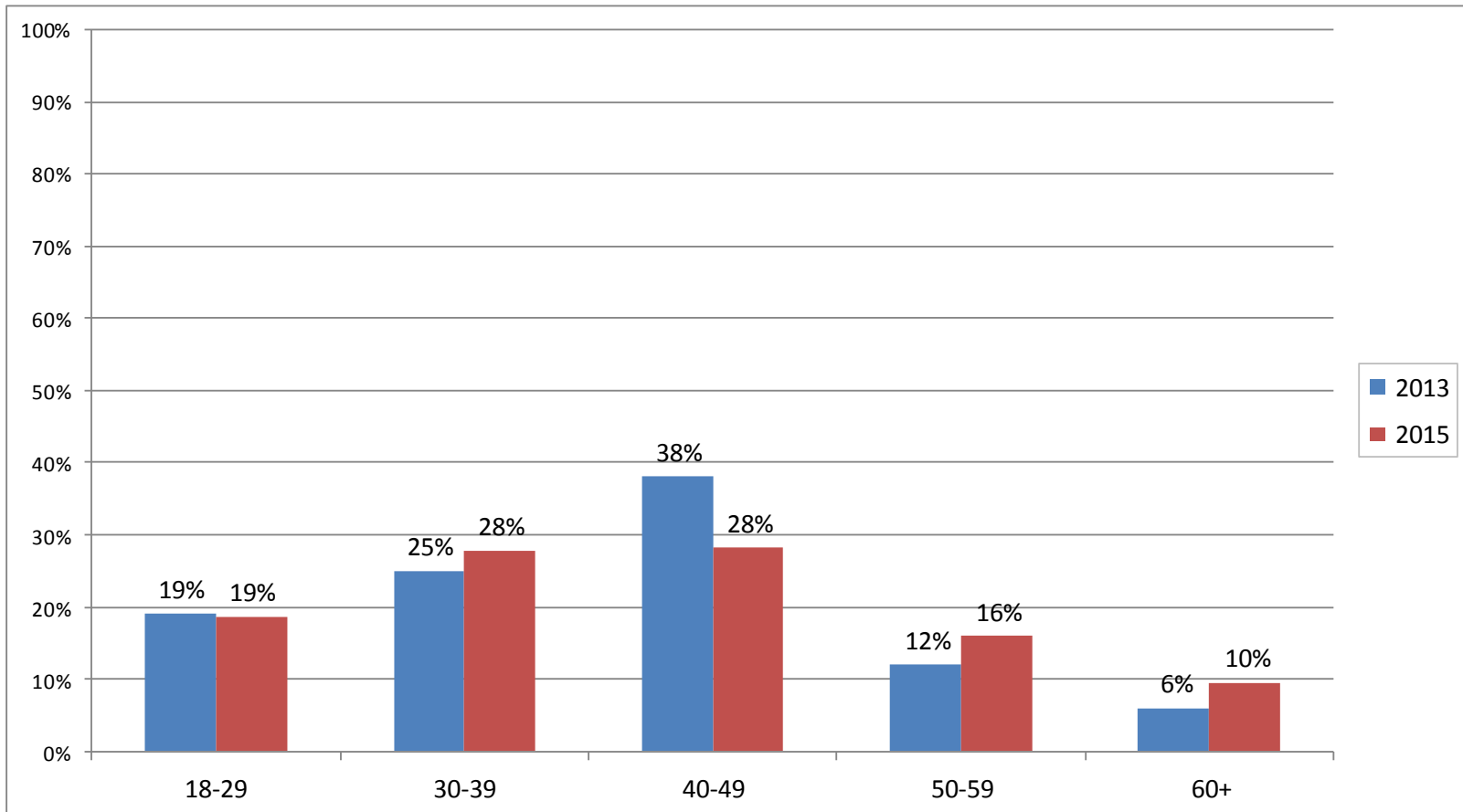
- Face to face survey with a probability sample of **222** respondents during two days of the weekend event, i.e. 9th and 10th of May 2015.
- Respondents were systematically selected throughout the two days.
- Secondary data was obtained from the event organizers.

Respondents Gender



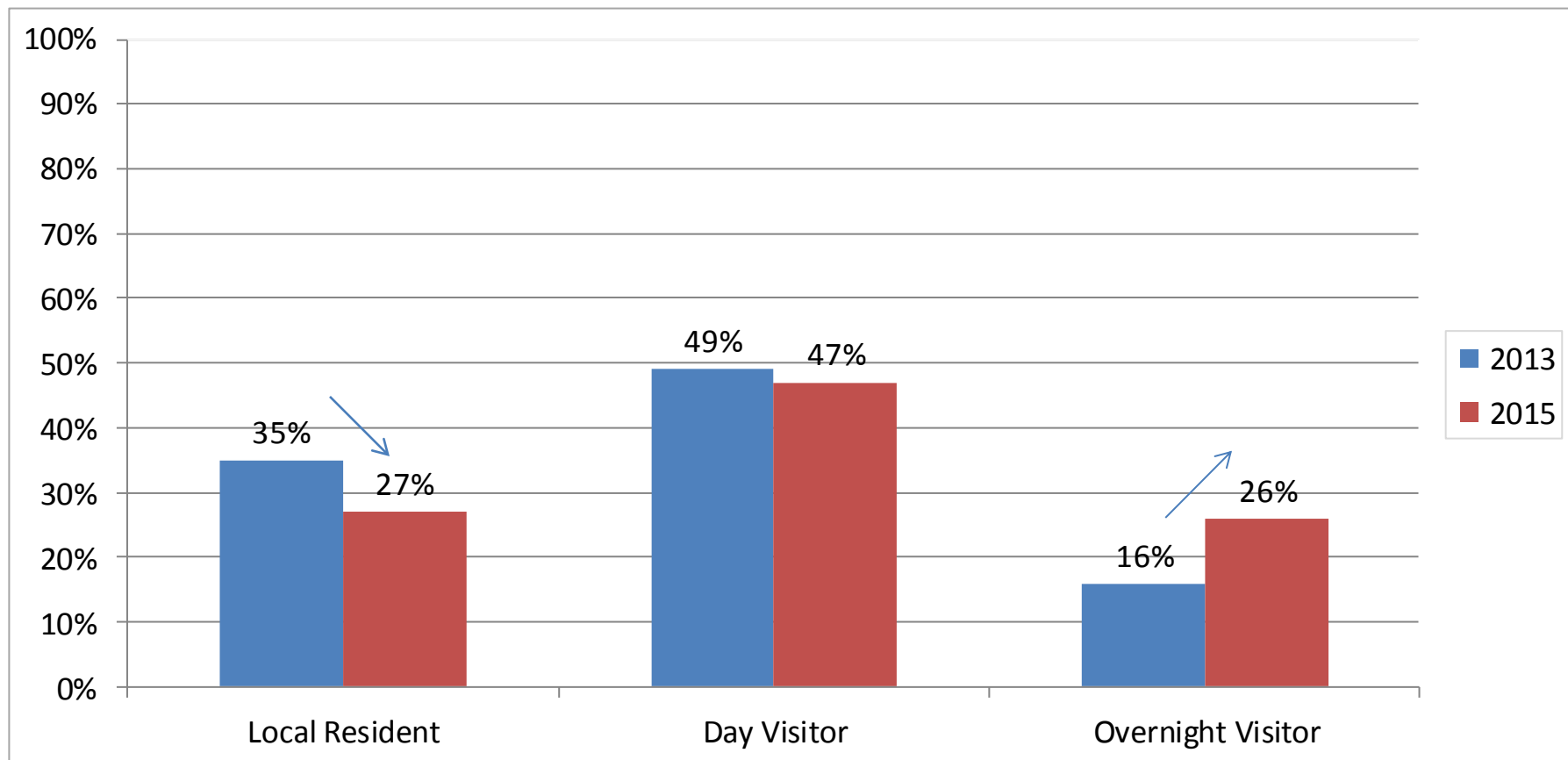
It is evident in the graph above, that the number of female respondents has decreased along with an increase in the number of male respondents. Although the number of female respondents is still higher than the number of males, the division of the two is more or less equal. Furthermore, an A-Z test was performed and it showed that there was no major significance between the results from 2013 and 2015.

Age Groups



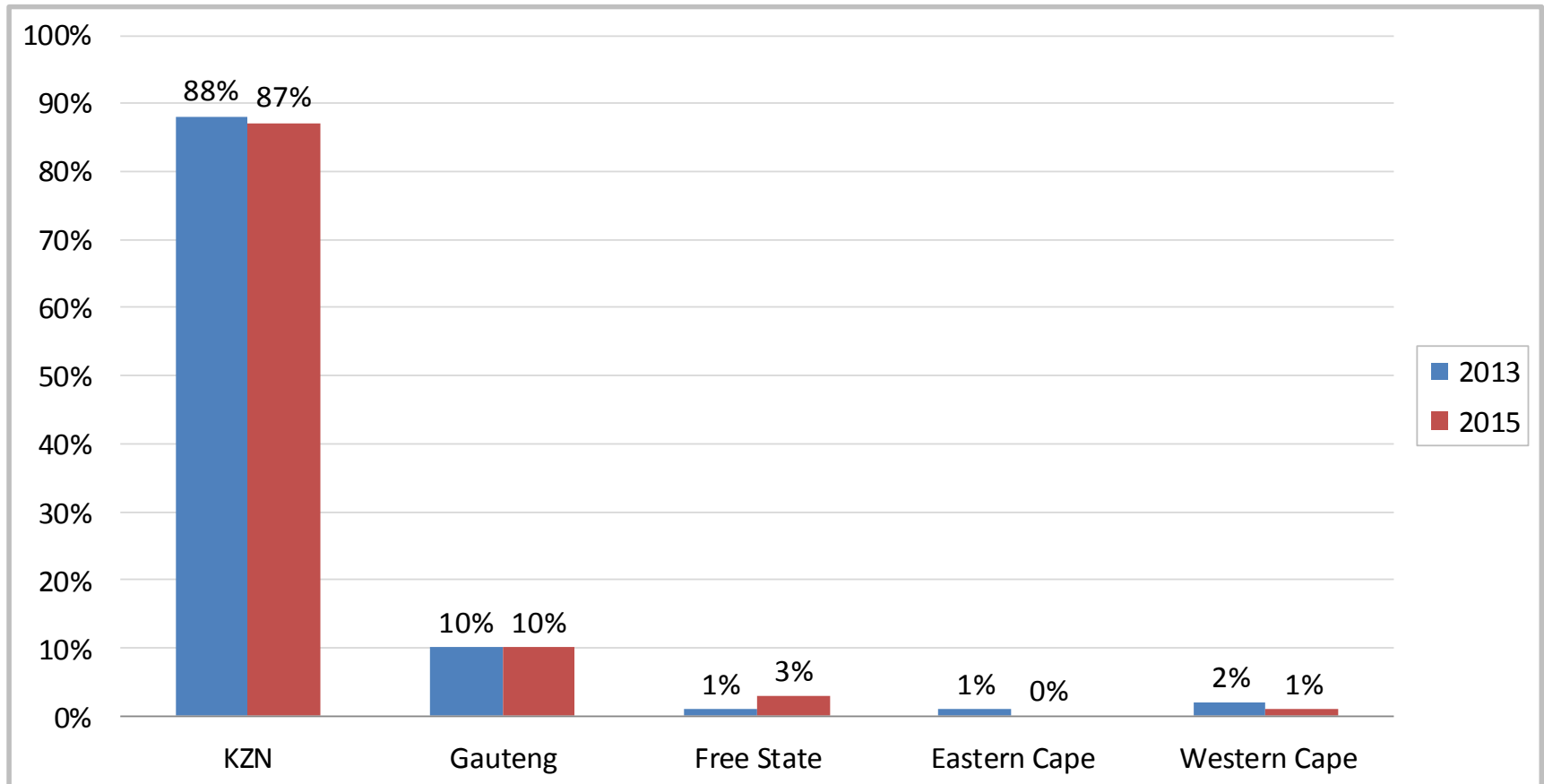
It is evident that there has been a general increase in the “older” age groups when comparing 2013 and 2015. However, there has been a significant decrease in the age group – 40-49. It is therefore necessary to aim any marketing or promotional activities at these age groups (i.e. 30-60+). These age groups also generally fit into middle to high income groups which are the most common to take part in mountain biking.

Nature of Participants and Spectators



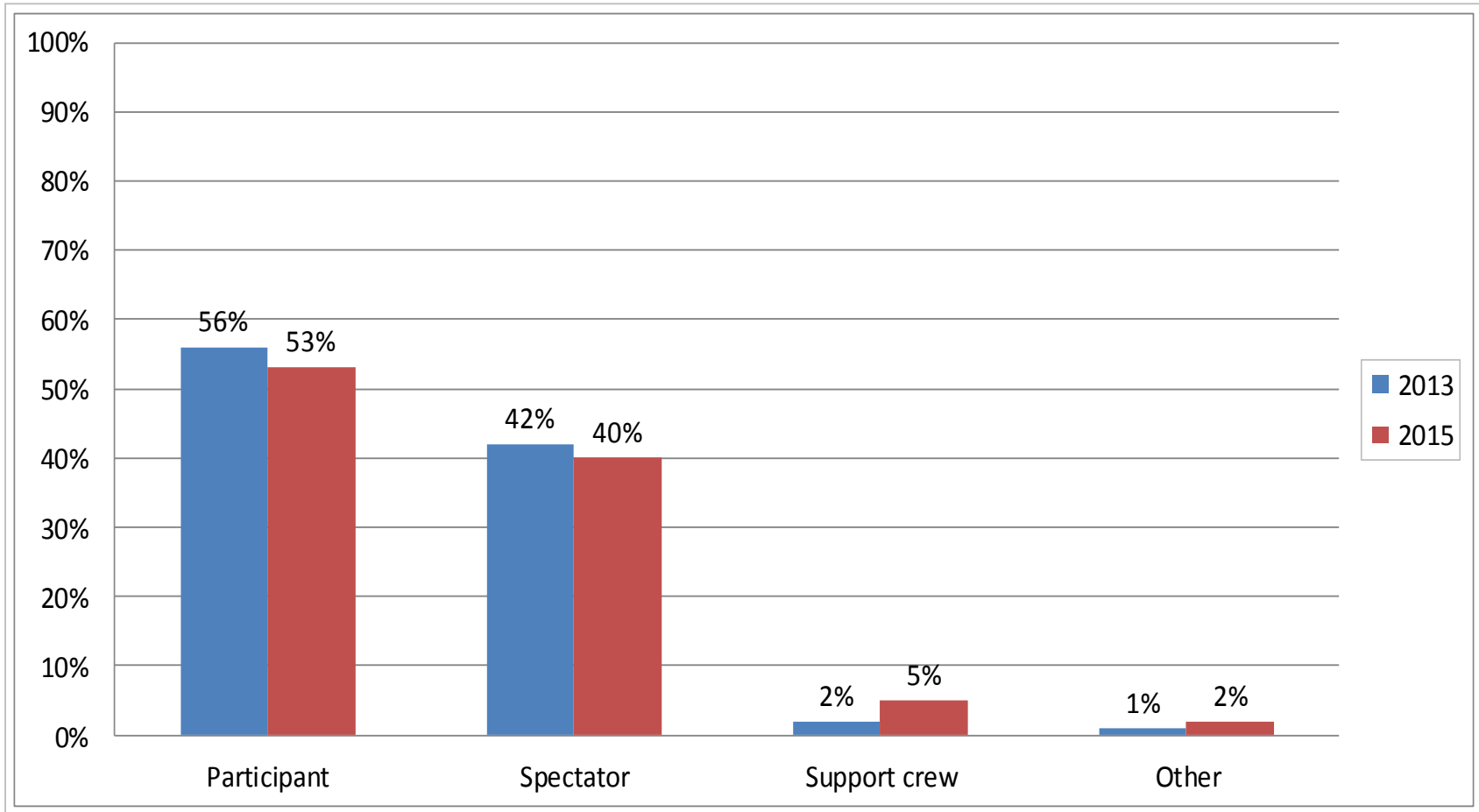
The graph depicts a very positive result in terms of the wider economic impact of this event. Between 2013 and 2015 there has been a decrease in the number of respondents who are local residents along with an increase of overnight visitors. This increase in overnight visitors means that there are a higher number of people spending a higher amount of money at and for the event. There was a slight decrease in day visitors but this is not considered to be significant.

Provinces



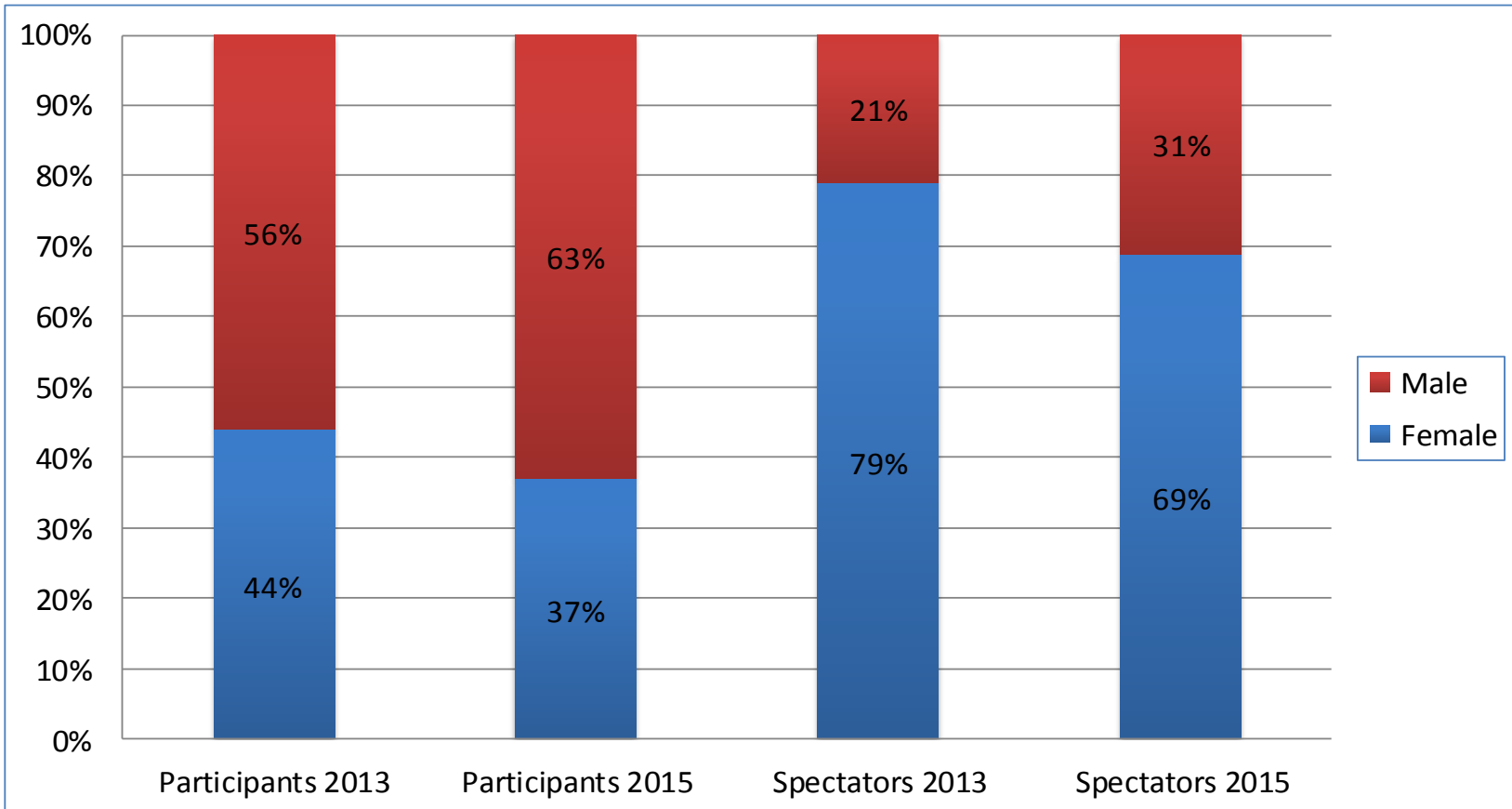
There were no significant changes in terms of which provinces the respondents were from. There was a slight increase in the number of respondents from the Free State.

Purpose of Visit



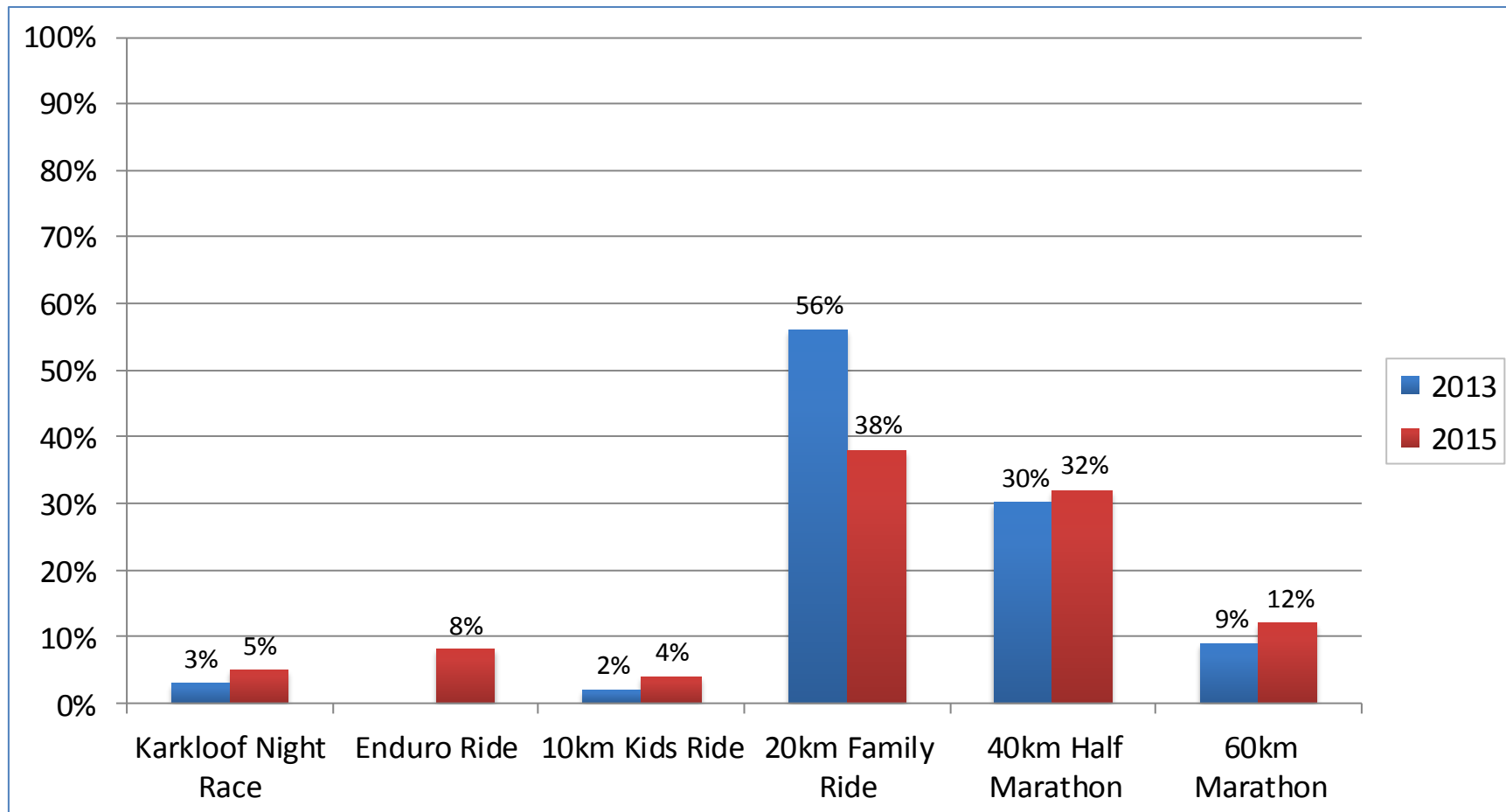
There were no significant changes between 2013 and 2015. However there was a slight increase in the number of respondents who were considered as “support crew”. Therefore, the large majority of respondents remain participants or spectators.

Gender: Participants & Spectators



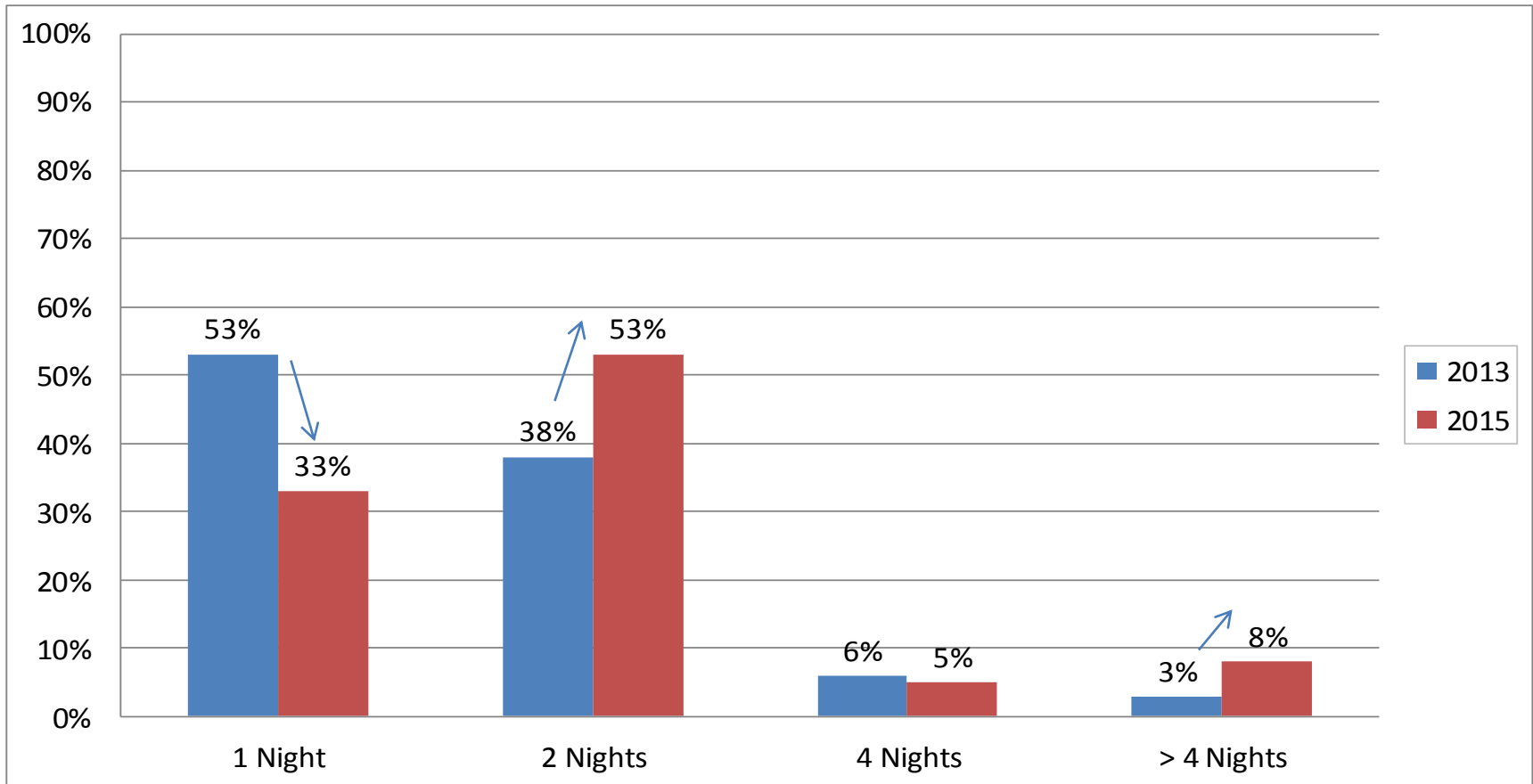
Some of the key differences between 2013 and 2015 are as follows: there has been an increase the number of male participants and while there has been an decrease in the number of female spectators. This graph backs up slide 4, which shows that the majority of female respondents are spectators as they are supporting their partners in the race – thus that is why the graph shows more male participants.

Event/Race Attendance



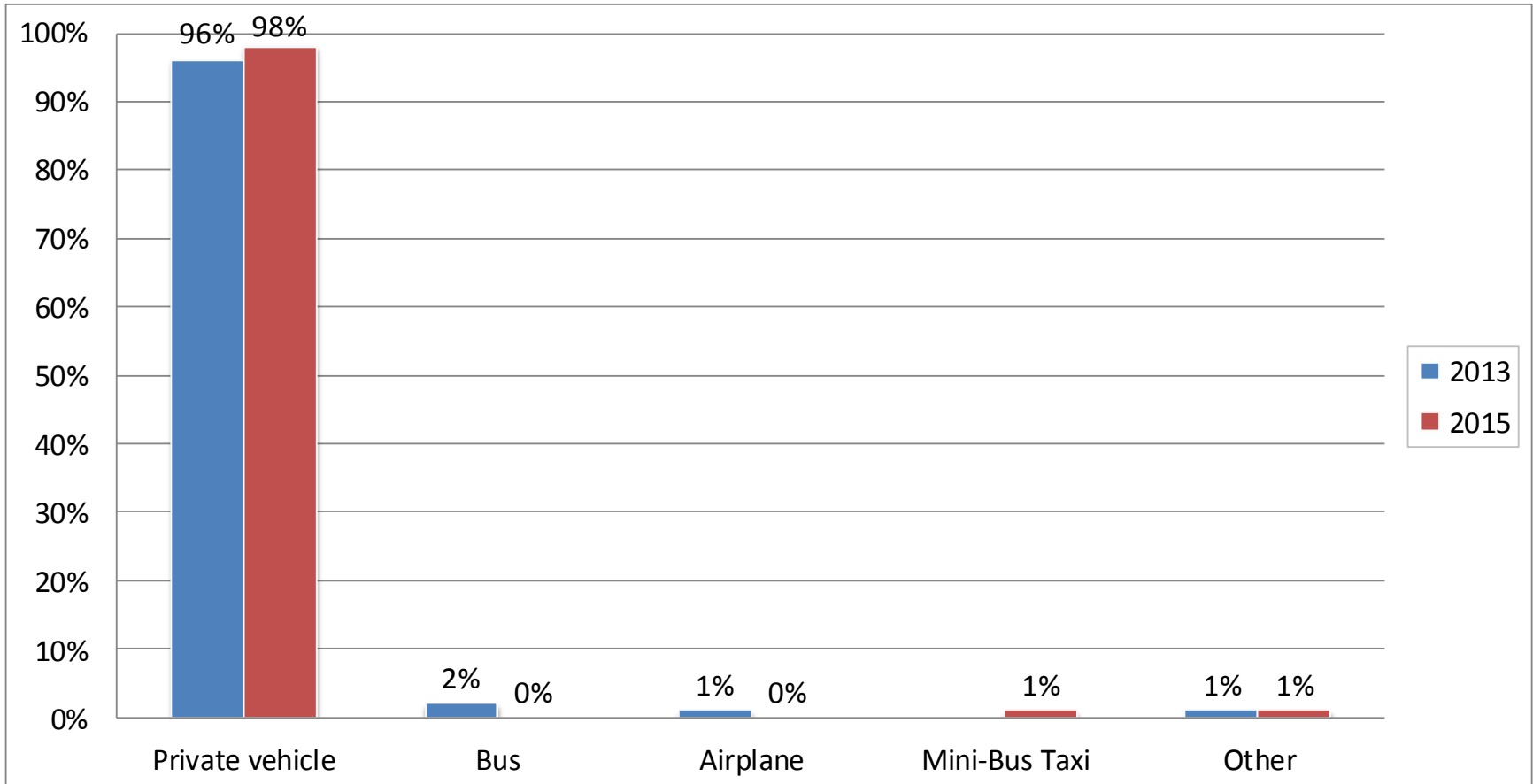
The majority of the races achieved an increase regarding their participation – barring one, the 20km family ride. There is no cause for concern in this regard and the results merely show which are the more popular races. It was also recorded that 8% of all respondents participated in the Enduro Ride – this shows that this event is growing in popularity.

Length of Stay



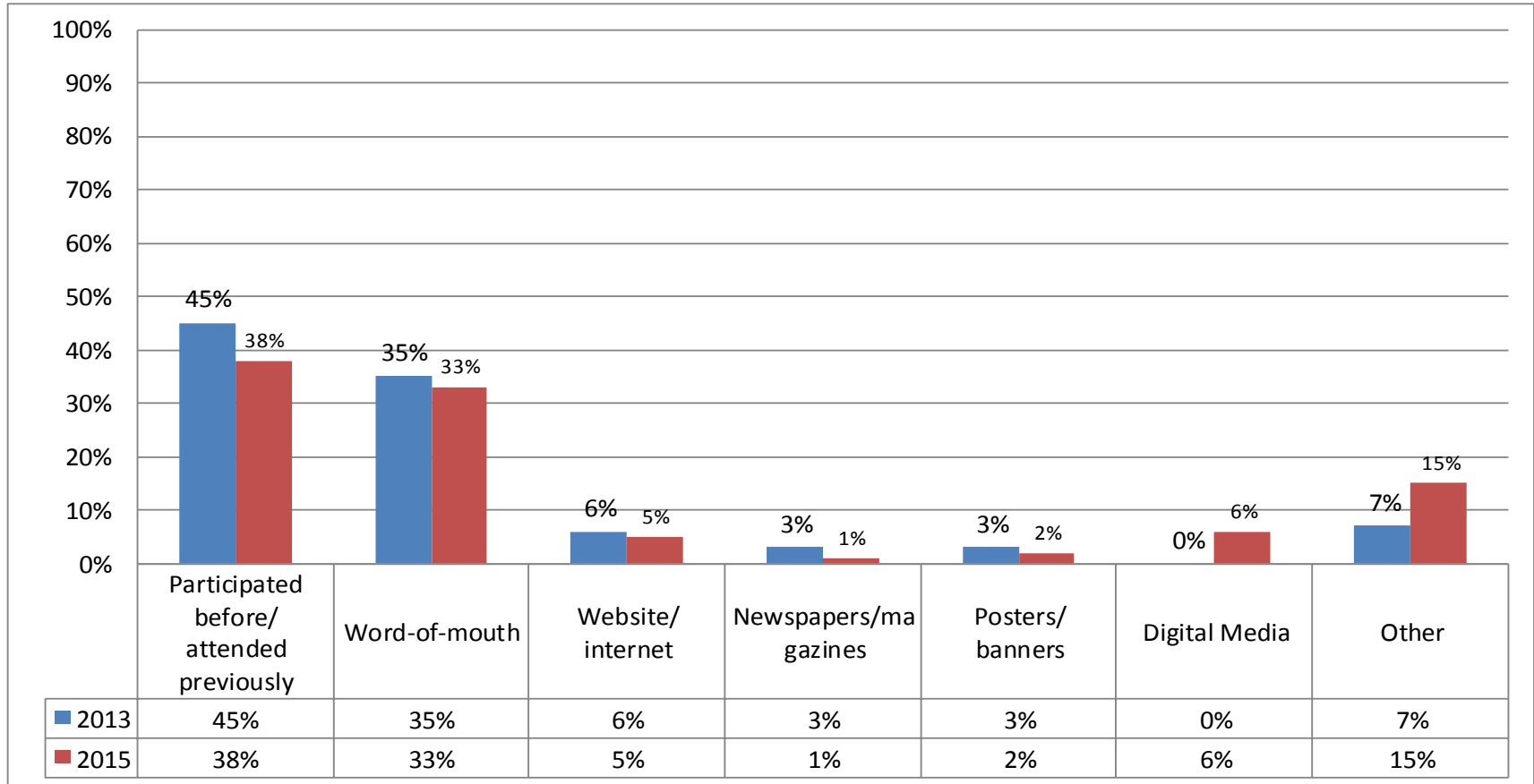
There have been significant changes in terms of how long the respondents are staying when comparing 2013 and 2015. There has been an increase in respondents staying for 2 nights along with a decrease in those staying for 1 night. This shows that people are “buying in” to the weekend event. The increase in both the “2 nights” and “>4 nights” has positive implications for the local region’s economy as the visitor’s spend will undoubtedly increase.

Transport to Event: Non-Residents



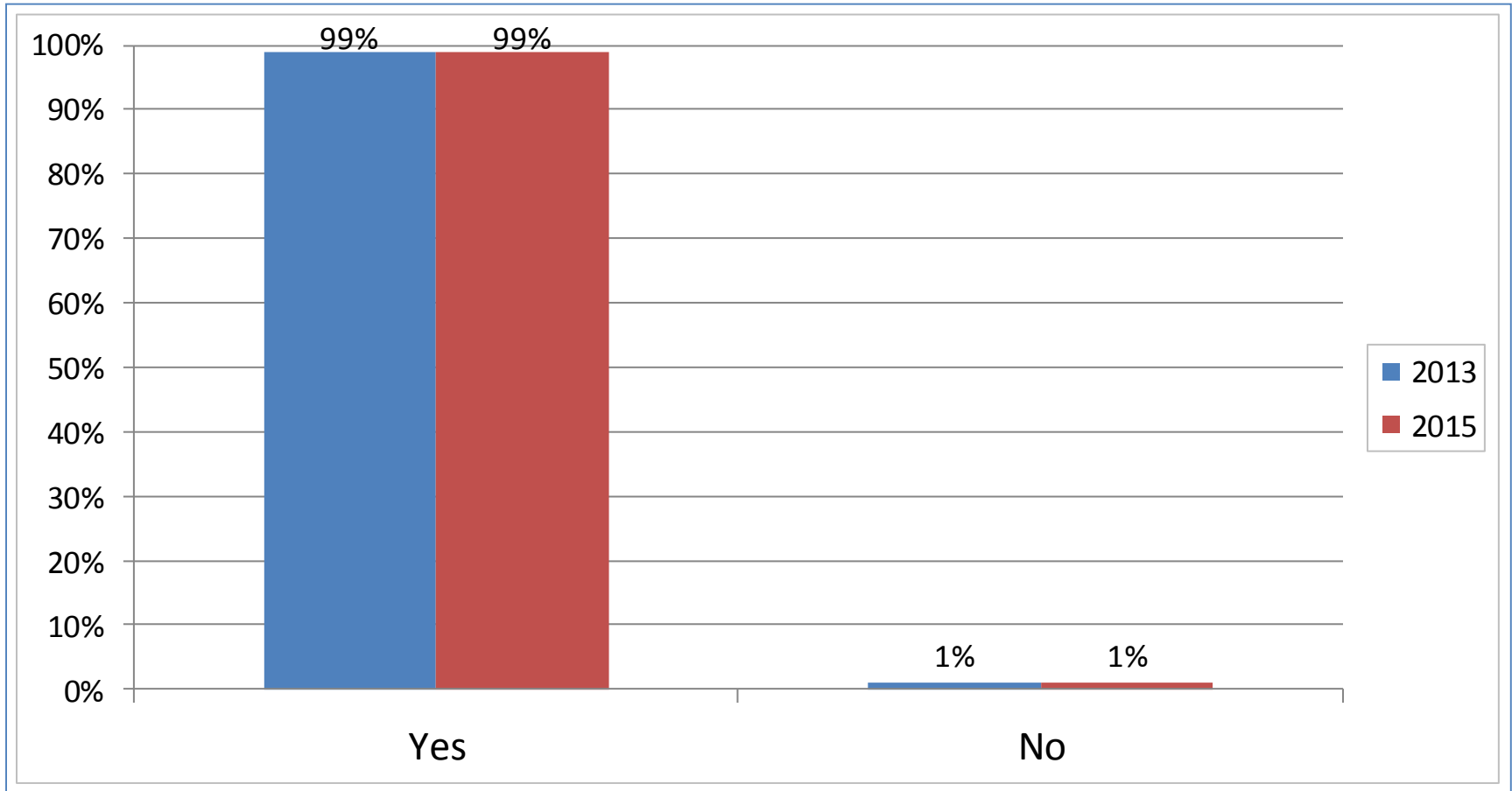
The most popular form of transport to the event by visitors is the private vehicle. In terms of “Other” forms of transport, it was deduced from the surveys that some participants ride their bikes to the event. There were no other significant changes.

Influenced to Attend?



It is important to note that the indicator, “Digital Media” was not used in 2013. It was introduced in 2015 to act as an indicator to determine which advertising medium is preferred – i.e. Print vs Digital. The website/internet indicator could also be included in Digital Media. In terms of “other” reasons, these include: ROAG members, TV ads, radio announcements and SAPPI employees. But the most important influencing media are previous participation and “Word-of-Mouth” and are considered to be more important than the others.

Information Satisfaction



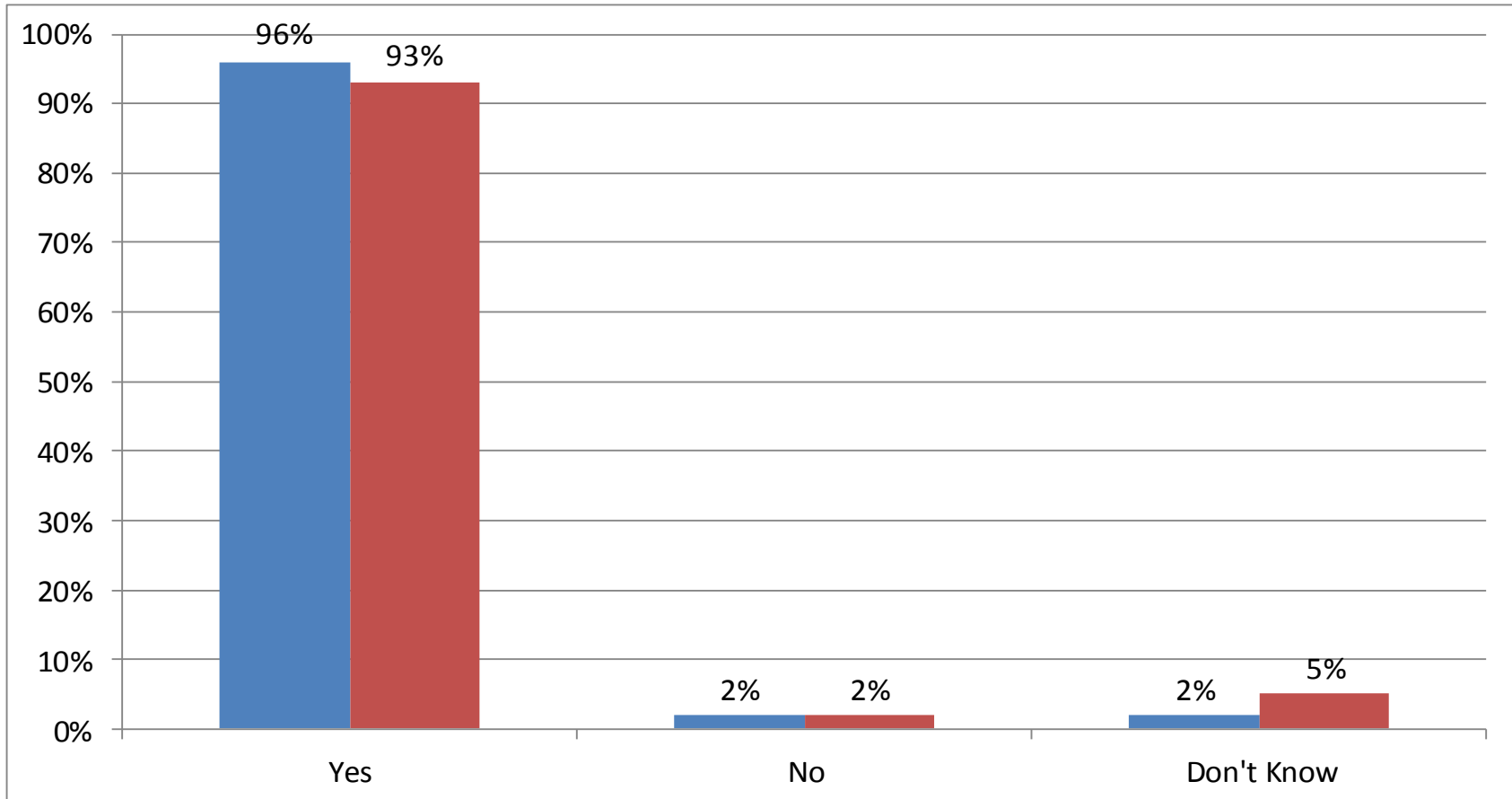
There have been no changes to the satisfaction of respondents with regards to access to information about the event.

Marketing Improvement Suggestions



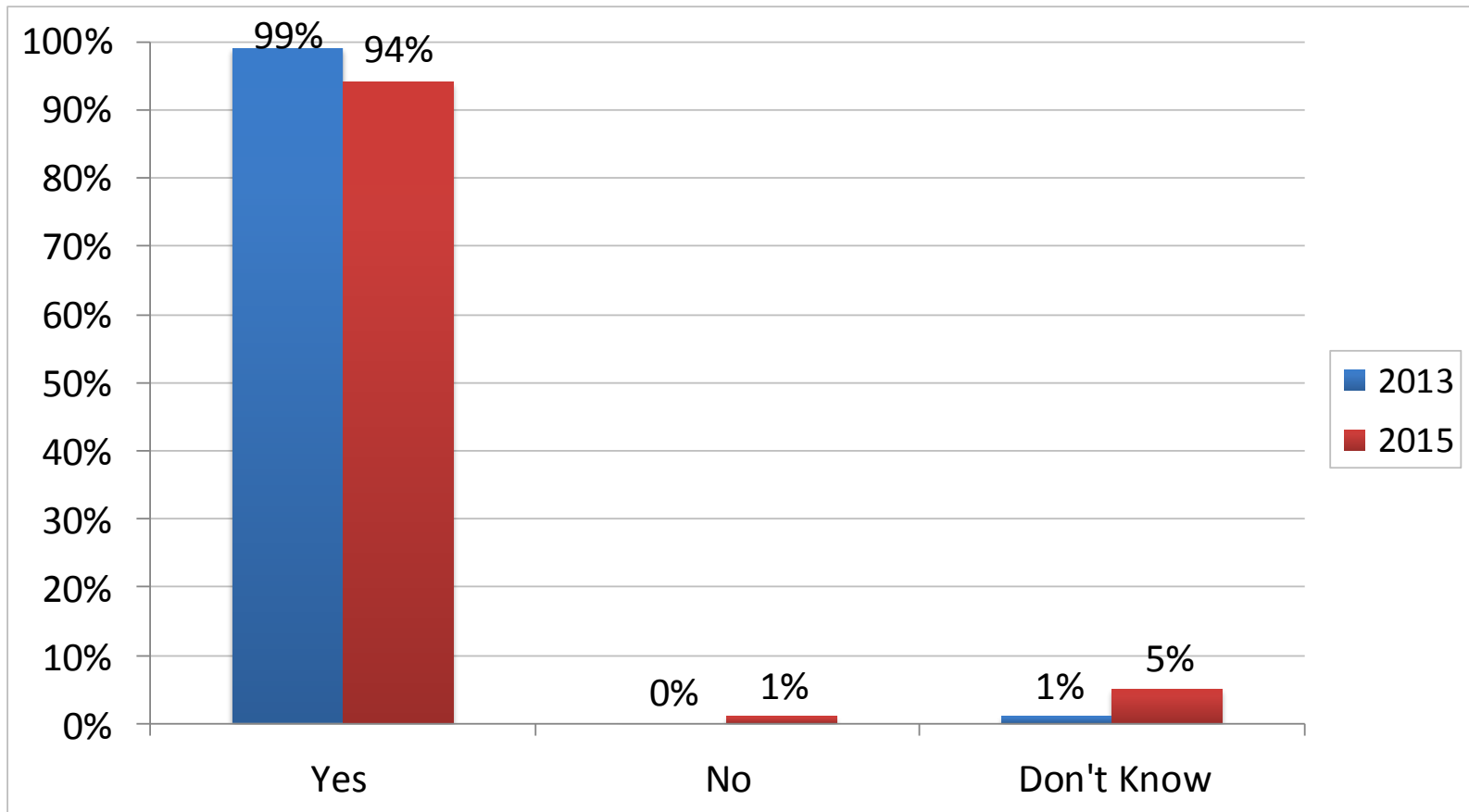
SUGGESTIONS	2013	2015	
Advertise on TV	4	3	↓
Advertise on radio	4	7	↑
Use different forms of media	3	2	↓
More billboards	2	1	↓
Use the internet	2	0	↓
Advertise in schools	2	0	↓
Advertise in newspapers/local newspapers	2	2	→
Create a Facebook page (i.e. social media)	1	3	↑
Advertise the event early	1	2	↑
Publish information on entertainment for the non-riders	1	0	↓
Magazines	1	1	→
More local advertising	1	0	↓
More advertising in bike shops	1	0	↓
Internet – cycling sites	1	0	↓
More tweets	1	0	↓
Signage around town	1	3	↑
Develop a route map	1	0	↓

Attend Again?



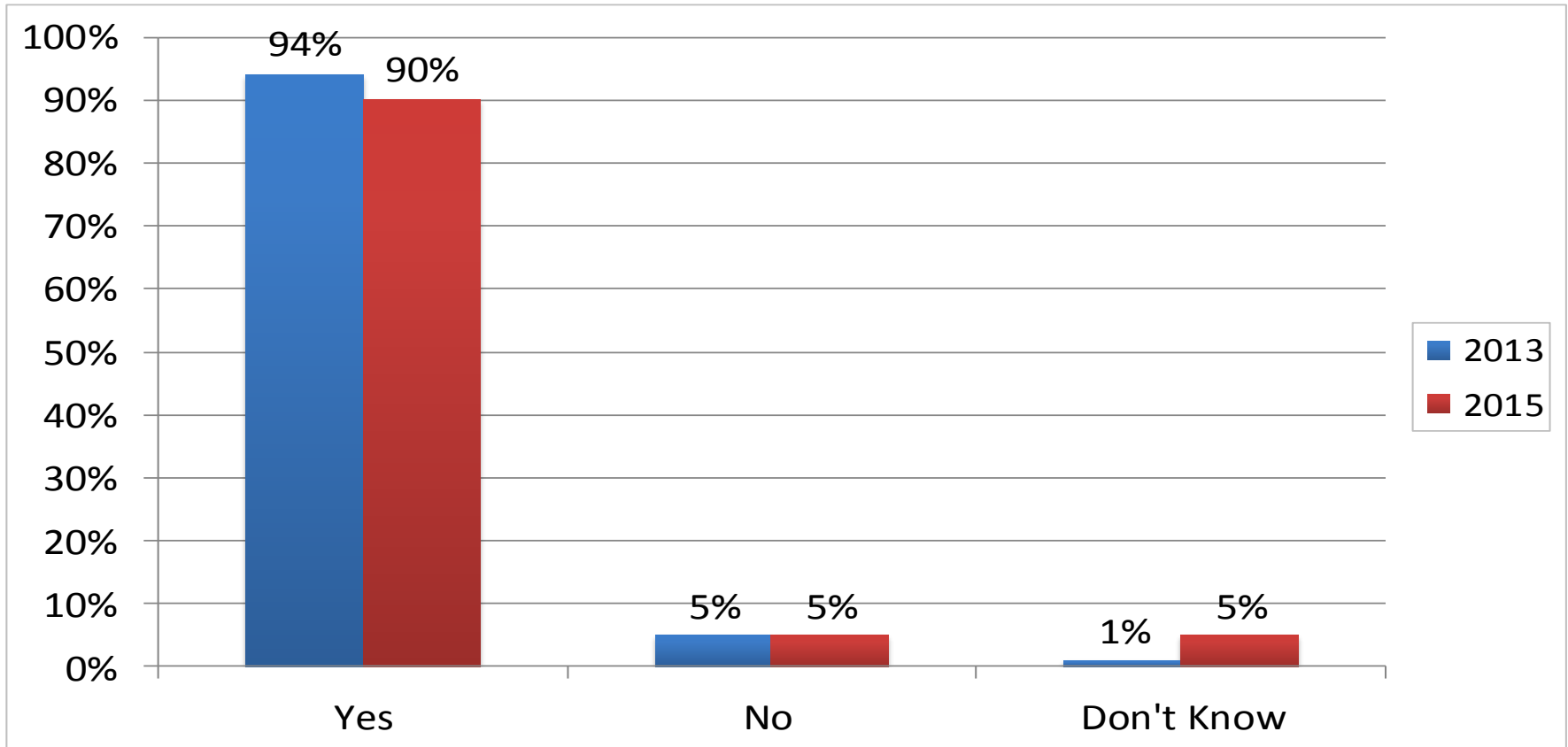
The majority (93%) of the respondents have indicated that they will attend the event again, even though there has been a minor decrease in this number. The percentage of respondents who “don’t know” if they will attend again has increased slightly. Furthermore, an A-Z test was performed and it showed that there was no major significance between the results from 2013 and 2015.

Future Attendance by Purpose of Visit: Participants



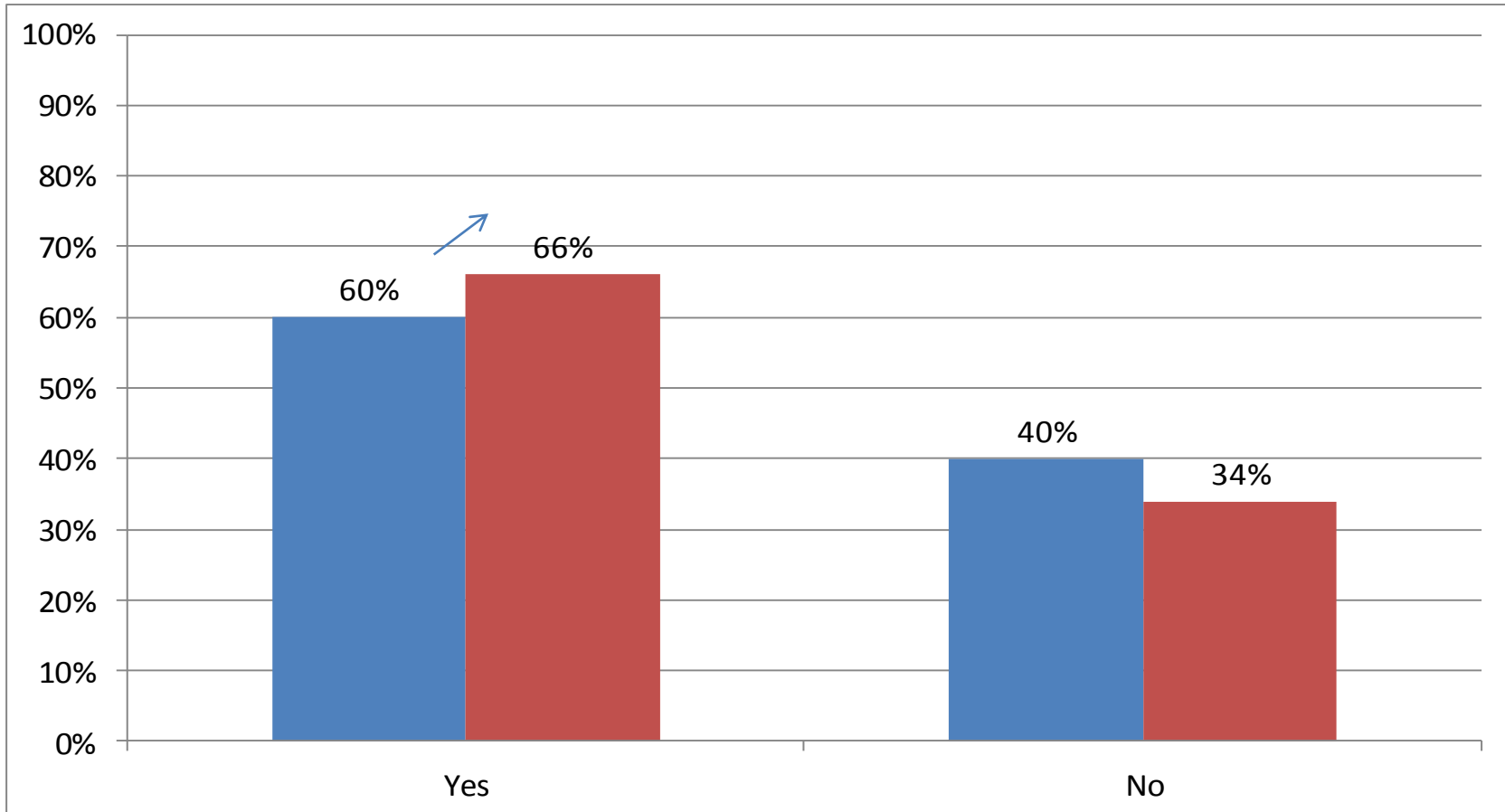
Although there was a decrease in the number of participants who said they would attend the event again, these were still in the majority.

Future Attendance by Purpose of Visit: Spectators



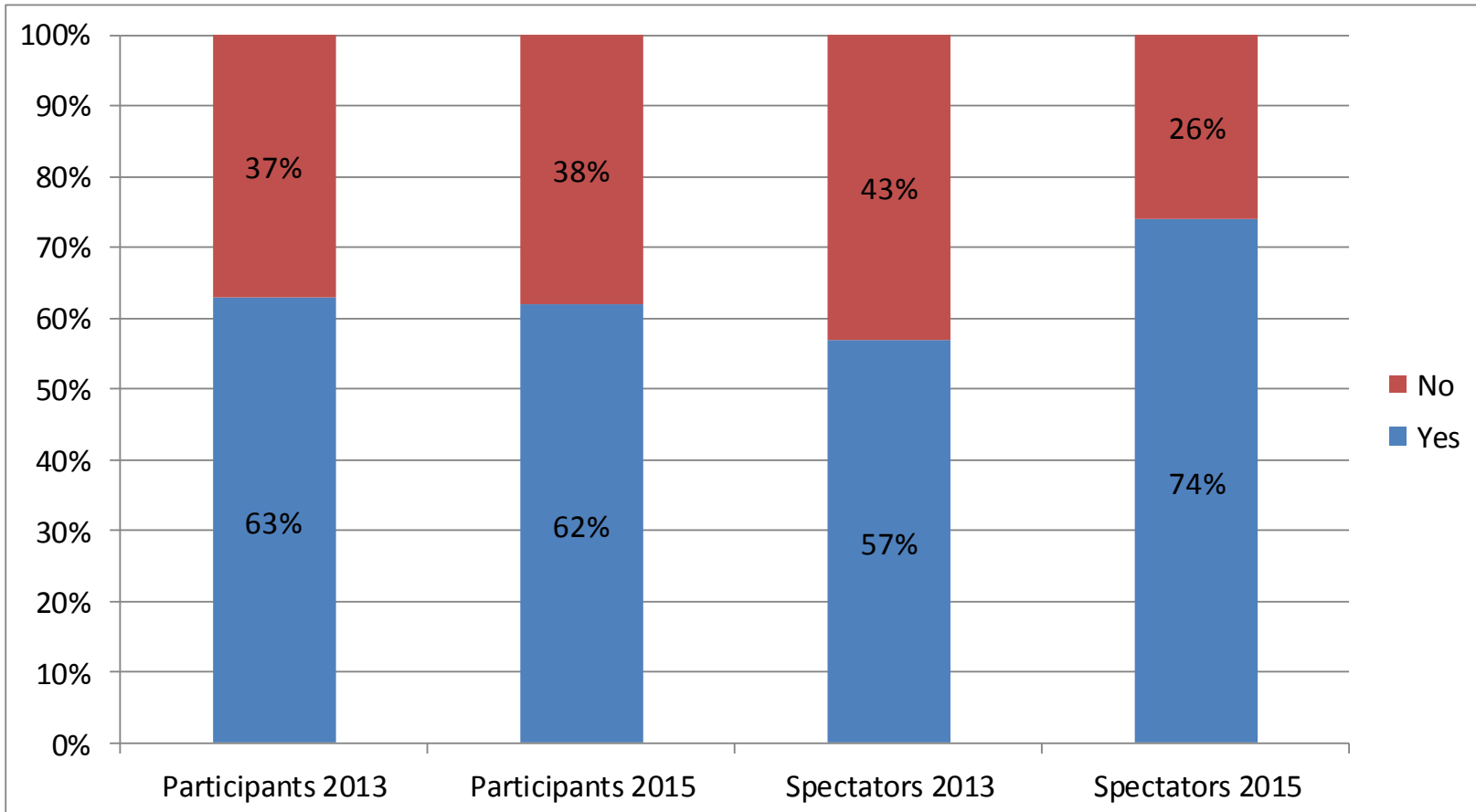
Although there was a small decrease in the number of spectators who said they would attend the event again, they still made up the large majority of respondents.

Attended in Previous Years?



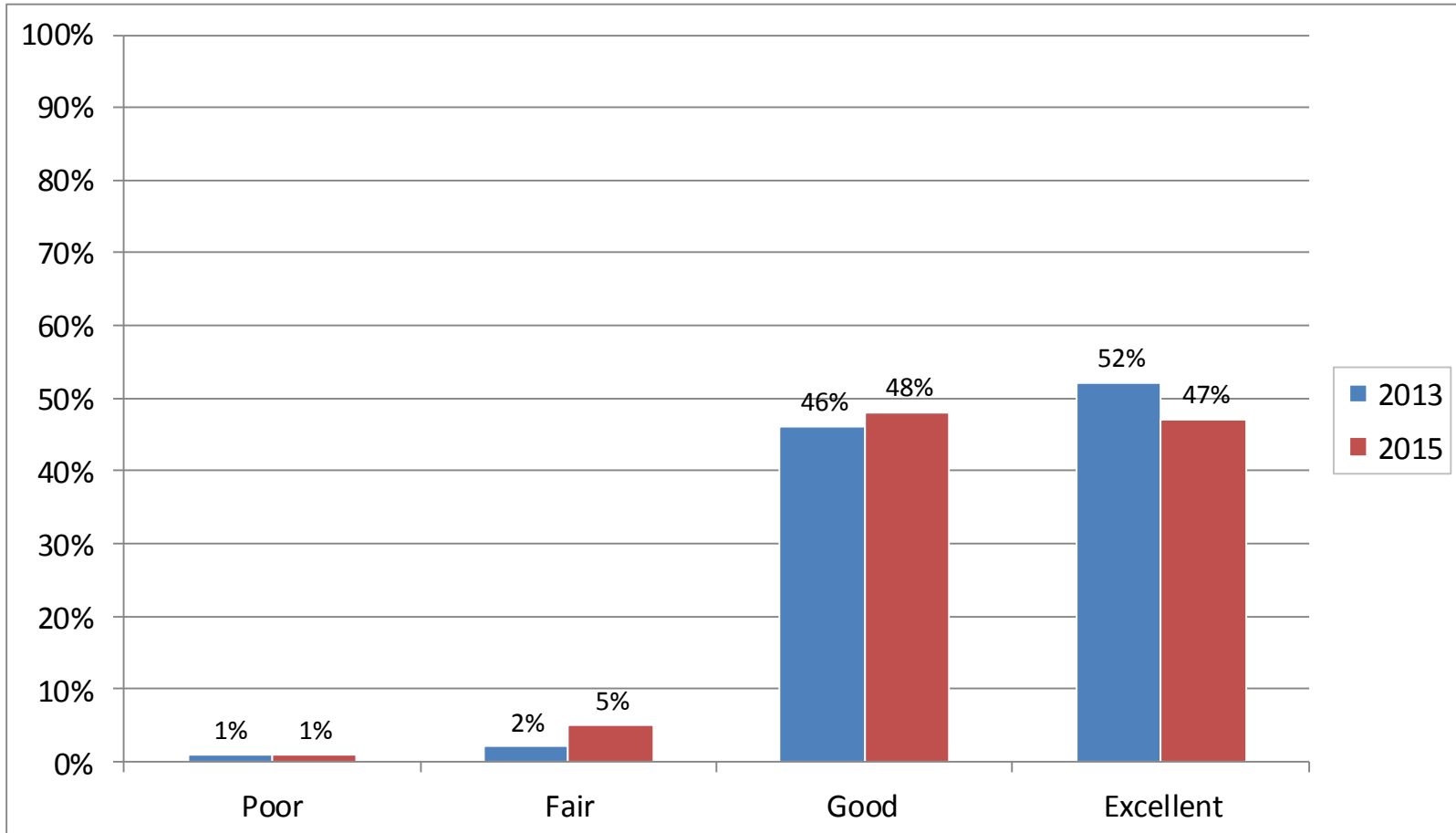
It is evident from the graph that there has been an increase in the number of respondents who have attended the event before. This shows that the event is growing and is well supported by those who have attended it on a previous occasion.

Attended in Previous Years? (cont'd)



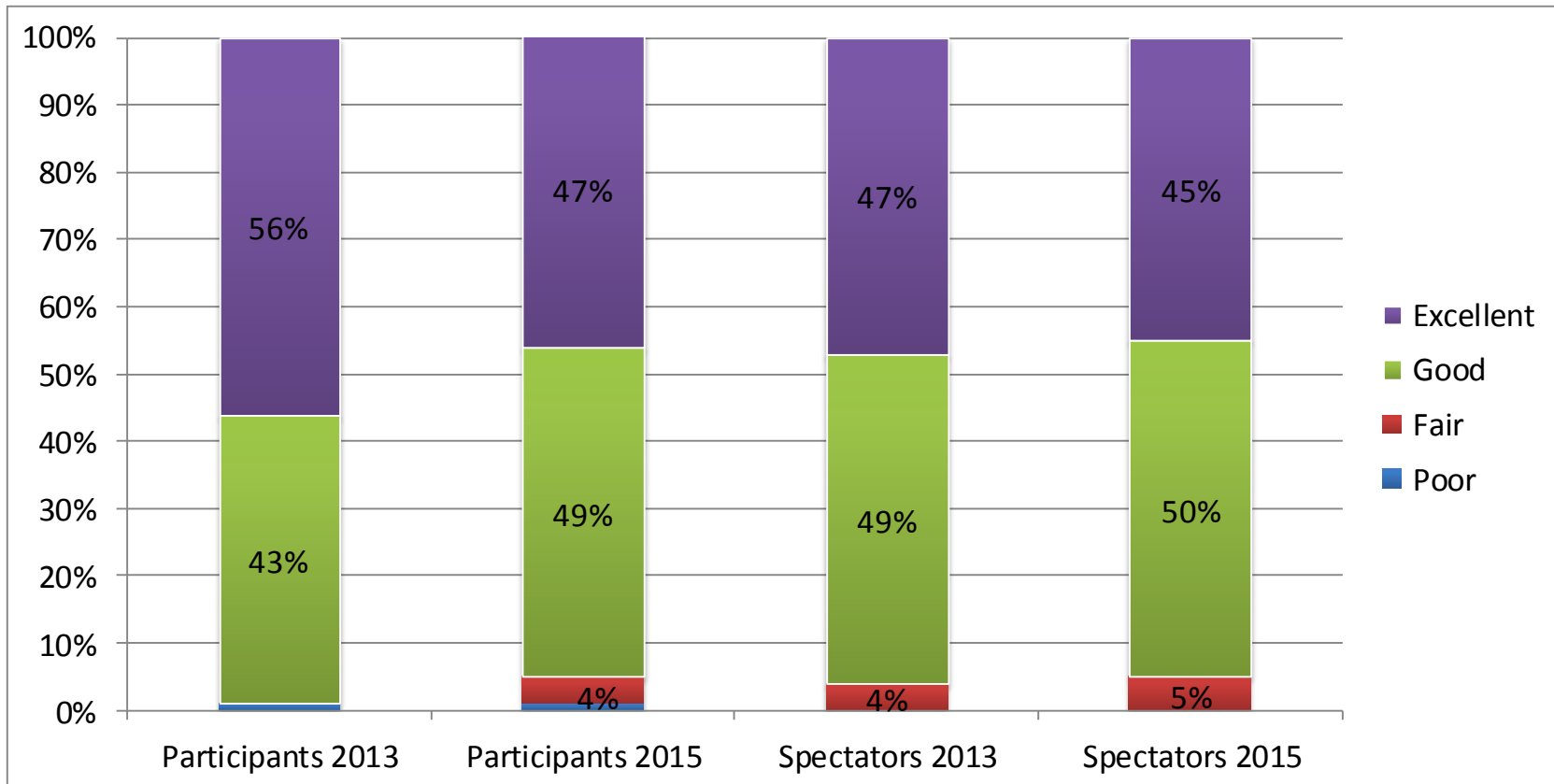
The number of participants who indicated that they had attended the event in previous years remained to be very similar when comparing 2013 and 2015. This shows that this event does well in attracting consistent participants. However, when comparing 2013 and 2015, the number of spectators who had attended the event previously had increased. This shows that the event can attract not only participants but also a number of spectators – i.e. families.

Experience Rating



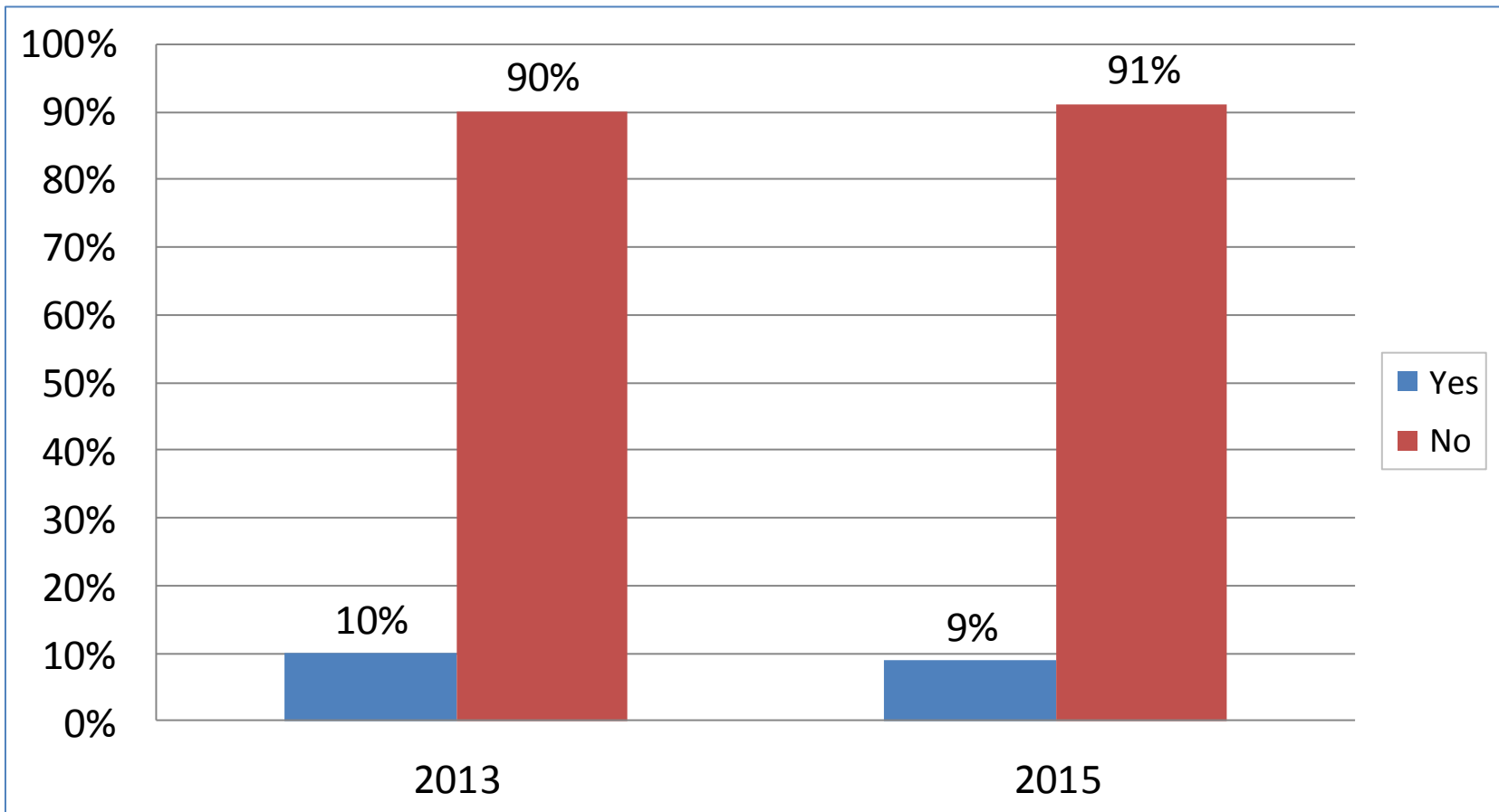
Overall, the majority of the respondents in 2015 had a “good” or “excellent” experience.

Experience Rating by Purpose of Visit



The only significant change when comparing 2013 and 2015 is that the amount of participants who had an “excellent” experience decreased. This decrease shows that most participants either had a “good” or “excellent” experience in 2015.

Experience Problems?



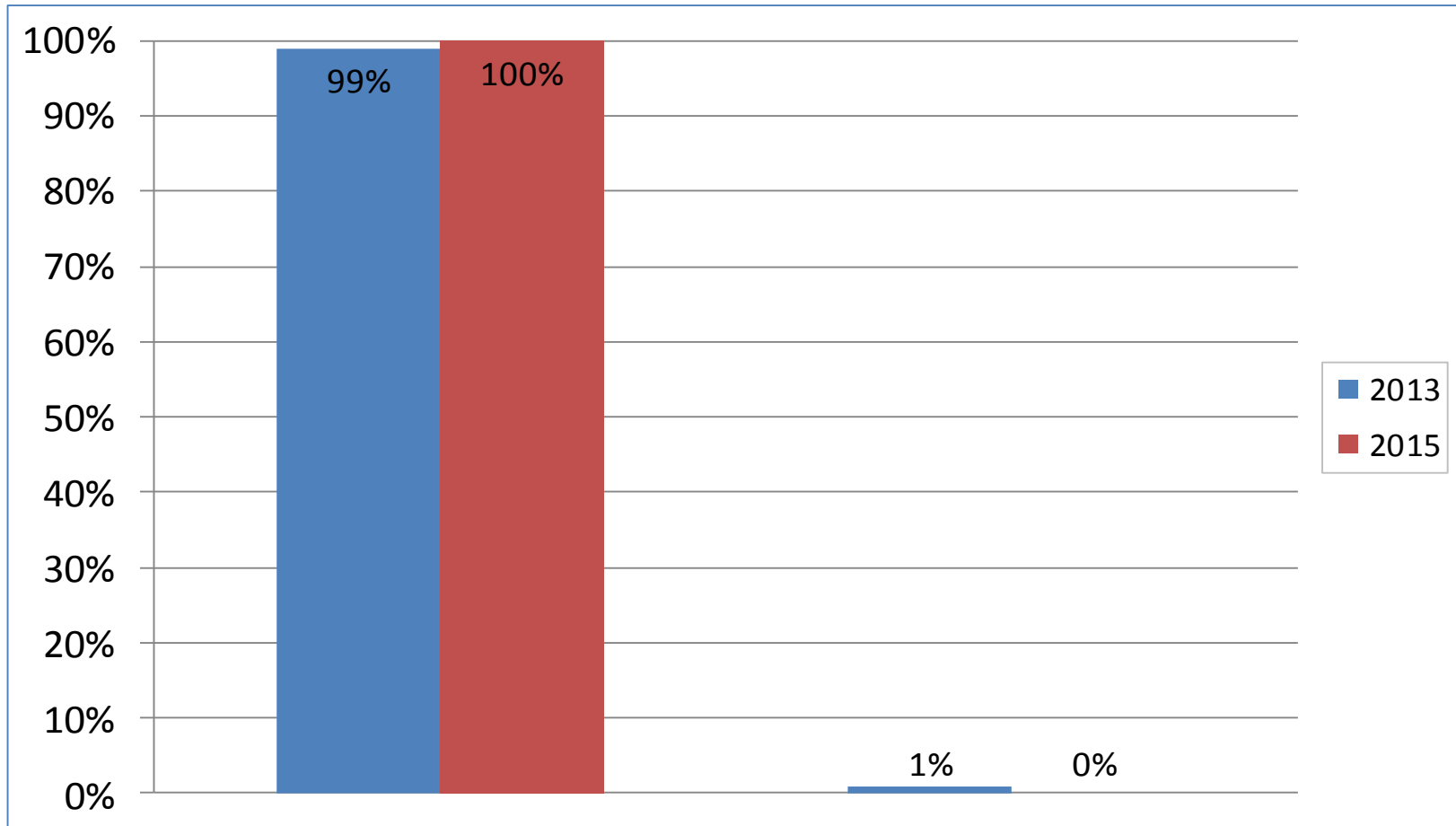
There were no significant changes when comparing 2013 and 2015.

Problems Experienced



- Insufficient number of bathrooms and toilets
- Night race was abandoned (?)
- No braai as per newsletter (?)
- More seating areas (i.e. chairs and tables for families/friends)
- Parking is too far from the start/event
- Registration desk/office was not open when needed
- Some race times started too late
- There were not enough rubbish bins – especially in the parking areas
- “Prize giving was sexist – no prizes for women’s 40km marathon”

Recommend the Event to Family & Friends?



The general response is that people will recommend the event to their friends and family – with 100% saying that they would in 2015,

Reasons for Recommending the Event

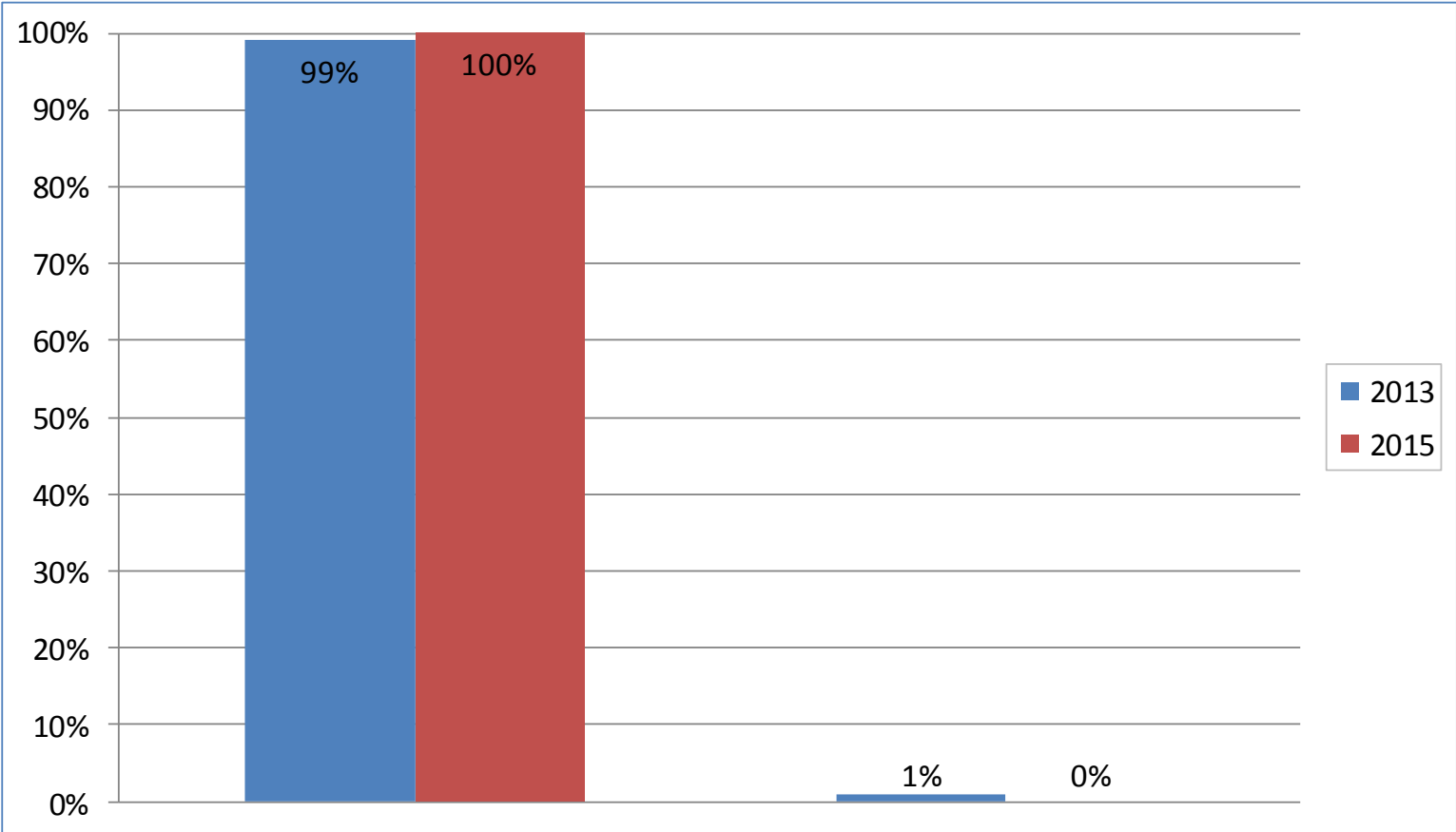


Respondents cited the following reasons for recommending the event*:

- Beautiful area
- Beautiful scenery/surroundings
- Best mountain bike event
- Enjoy cycling
- Family event
- Enjoyable/fun event
- Well organized
- Good atmosphere
- One of the nicest KZN events
- Social event
- To support/watch the riders
- It caters for all

**Note: the following reasons for the recommending the event are identical from the 2013 as many respondents cited exactly the same reasons. This shows that the event does well at maintaining its reputation as a top class mountain biking event.*

Recommend KZN as a Tourist Destination?



There have been no significant changes when comparing 2013 and 2015 and the general response is that people would recommend KZN as a tourist destination.

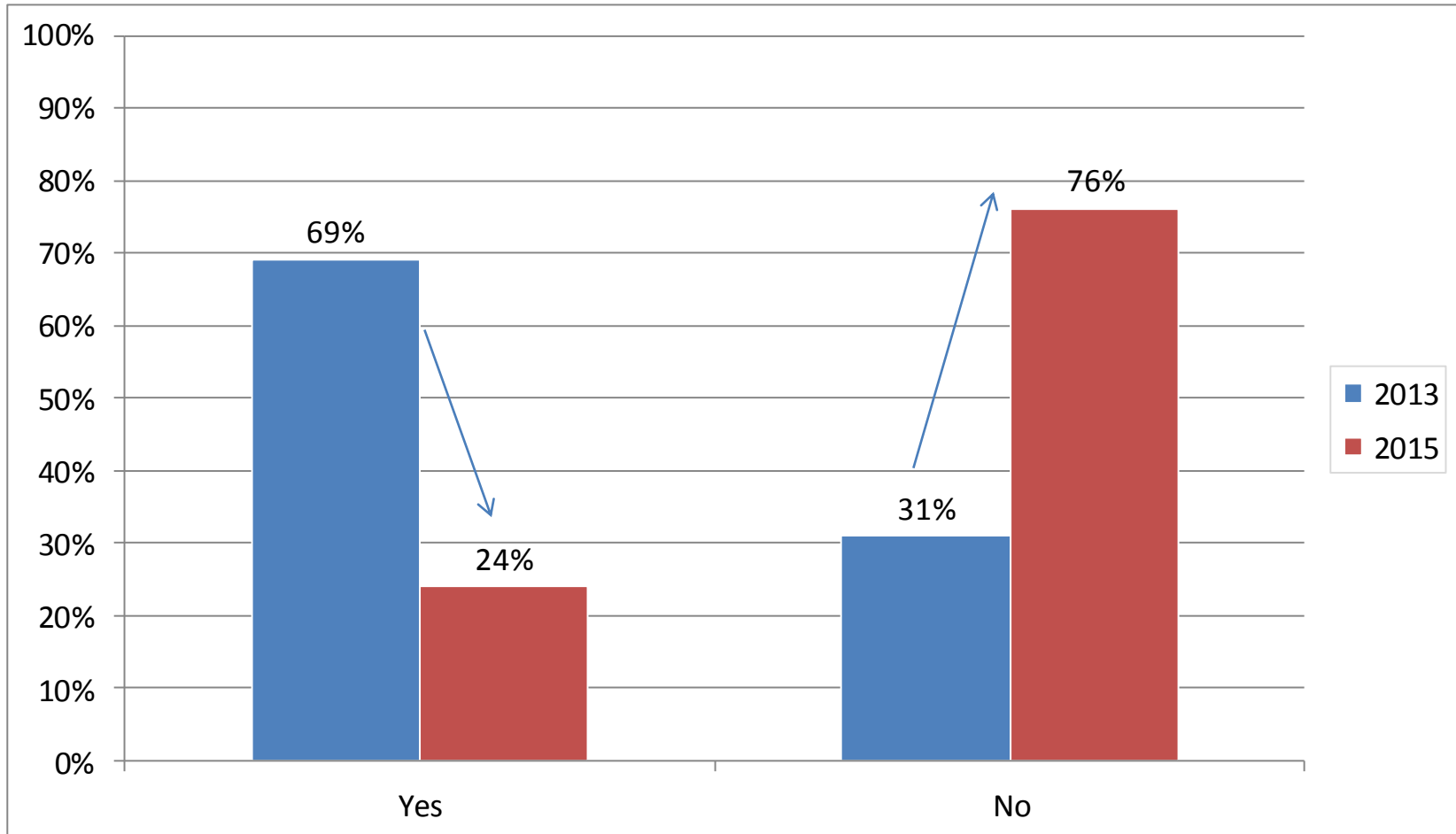
Reasons for Recommending KZN as a Tourist Destination



- Variety of activities/attractions
- Beautiful province/place
- Good weather
- The beach
- Beautiful nature
- Good weather
- Drakensberg
- Friendly people
- Good events
- Value for money
- Nature/game reserves

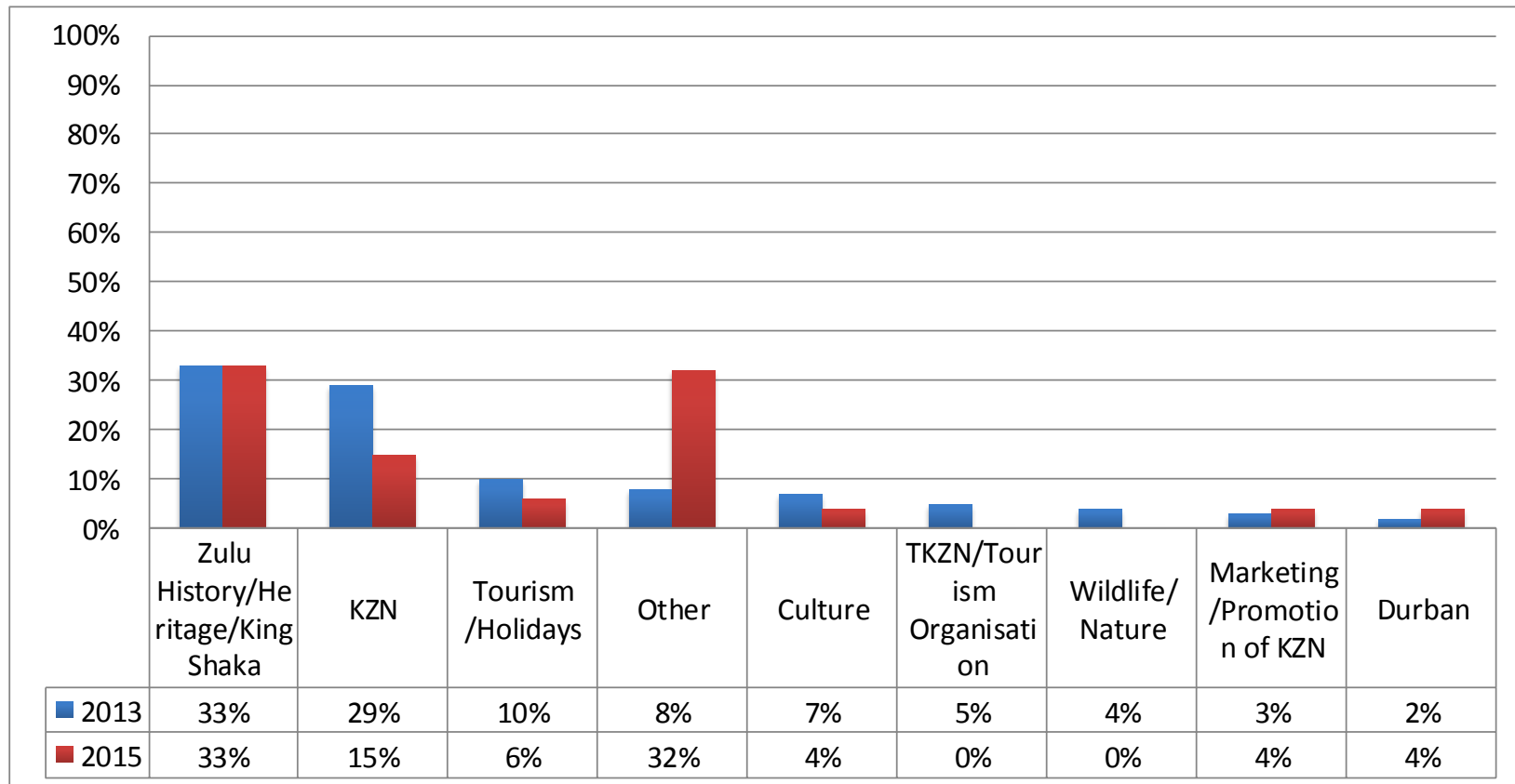
**Note: the following reasons for the recommending KZN are identical from the 2013 as many respondents cited exactly the same reasons.*

Familiar with Zulu Kingdom Slogan?



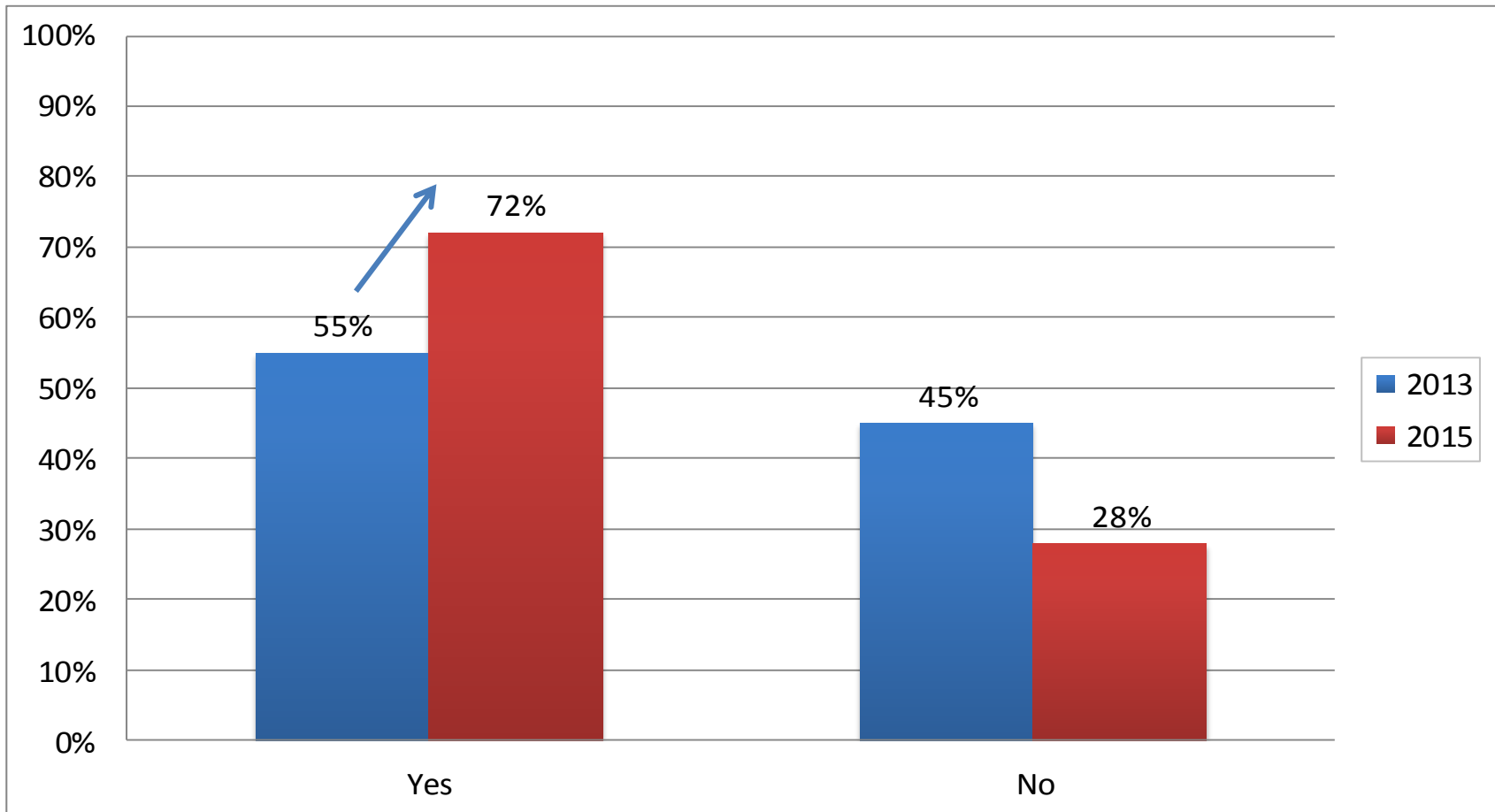
There has been a significant decrease in the familiarity of the Zulu Kingdom Slogan by the respondents when comparing 2013 and 2015, This can be seen as a cause for concern for the branding of TKZN.

Associations - Zulu Kingdom Slogan: Core Mentions



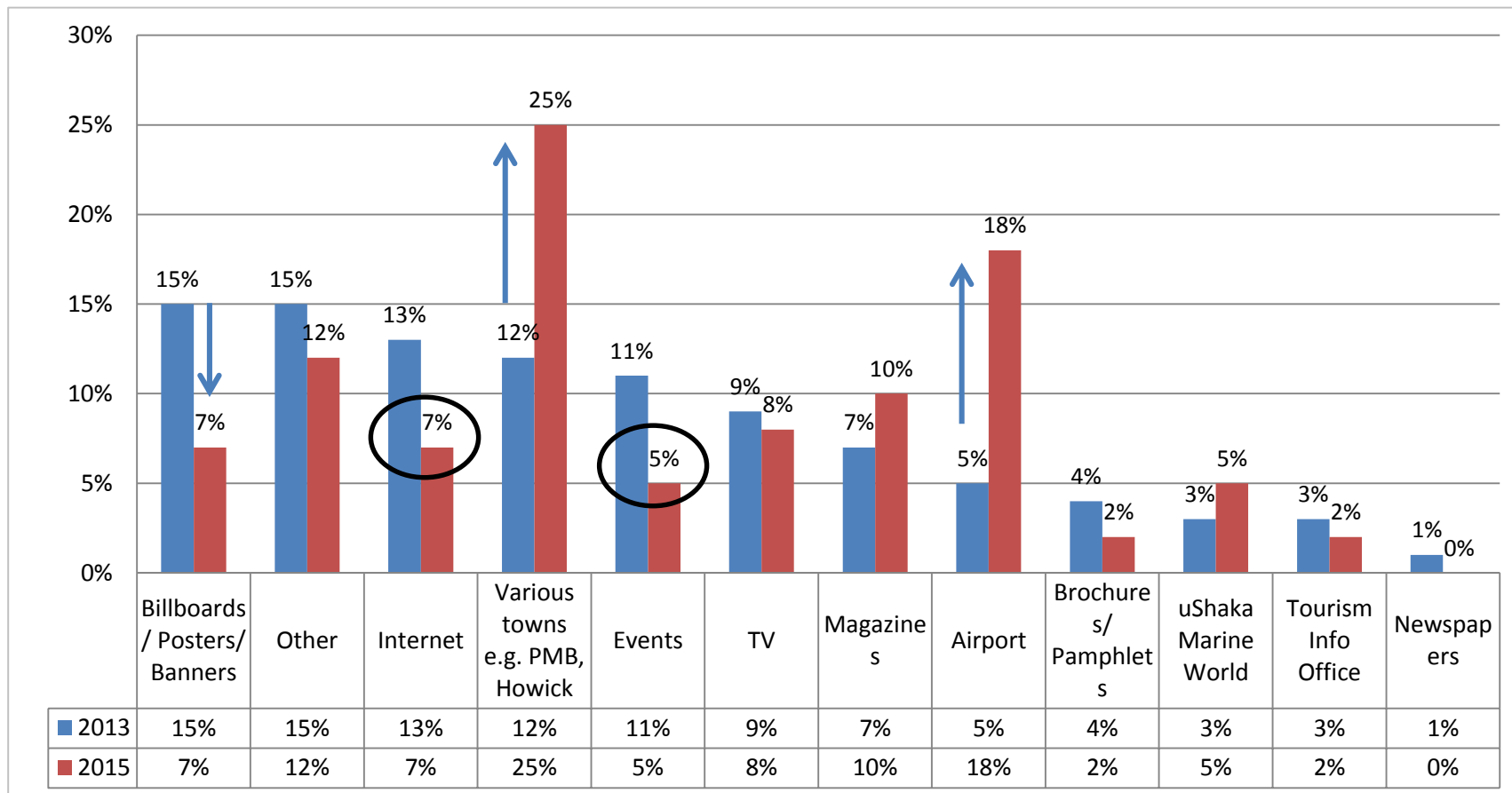
There have been two significant changes when comparing 2013 and 2015. Firstly, there has been a decrease in the number of respondents who associated the slogan with “KZN”. Secondly, there has been an increase in the indicator “other” – this includes associations with attractions such as uShaka Marine World or they were **not sure**. The fact that there was a decrease in the association with “Tourism/Holidays” is a cause for concern for TKZN.

Noted Zulu Kingdom Logo?



When comparing 2013 and 2015 it is evident that there has been a significant increase in the number of people who have noted the TKZN logo. This shows some positive signs regarding TKZN's branding and it is important to note that out of the first three events of 2015, there has always been a decrease in the amount of people who have noted the logo.

Where Zulu Kingdom Logo Noted?



There have been a number of changes in terms of where the respondents have noted the TKZN logo when comparing 2013 and 2015. There has been a significant decrease in the noting of the logo from “Billboards/Posters/Banners. However, there has been an increase in the noting of the logo within “various towns” and at the “airport”. The decrease in the noting of the logo on the “internet” and at “events” is a cause for concern for TKZN in terms of branding and digital marketing.

Event Improvement Suggestions



The respondents made the following suggestions in terms of improving the event in future:

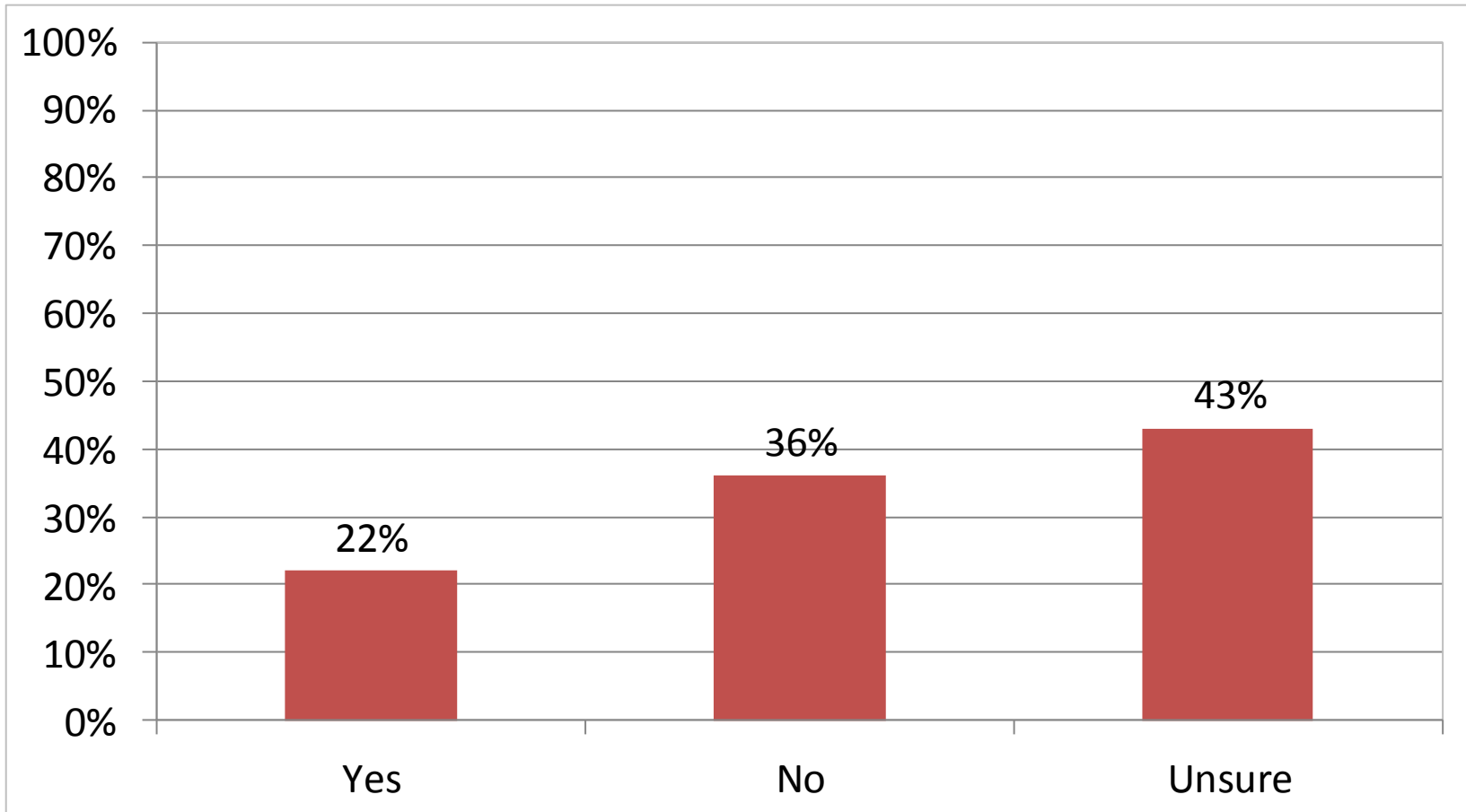
1. Better communication is needed from the race organizers
2. Need for fundraising and initiatives to support the local community
3. Electrical points should be provided within the camping area
4. Entertainment should be provided for the spectators during the day/weekend
5. More advertising/promotion of the event is needed
6. There is a need for a larger “kids zone” – i.e. an area to entertain kids
7. More seating in shaded areas
8. Introduce spectator points on the course/trails
9. Registration should be open for longer and should be available at convenient times
10. More car guards/attendants to help direct traffic in and out of the parking area
11. A wider variety of food options such as vegetarian and healthy food options
12. The music and sound system was too loud for many people
13. Race day seeding needs attention – fast riders mistakenly placed at the back and was caught up by slower riders

*Note: Please also refer to the slide on “recommendations” at the end of this presentation for a list of recommendations from TKZN and other stakeholders.

Special Feedback



Special Request 1: “If the date of the event was changed to stop clashes with other events, would you participate in both/more events?”

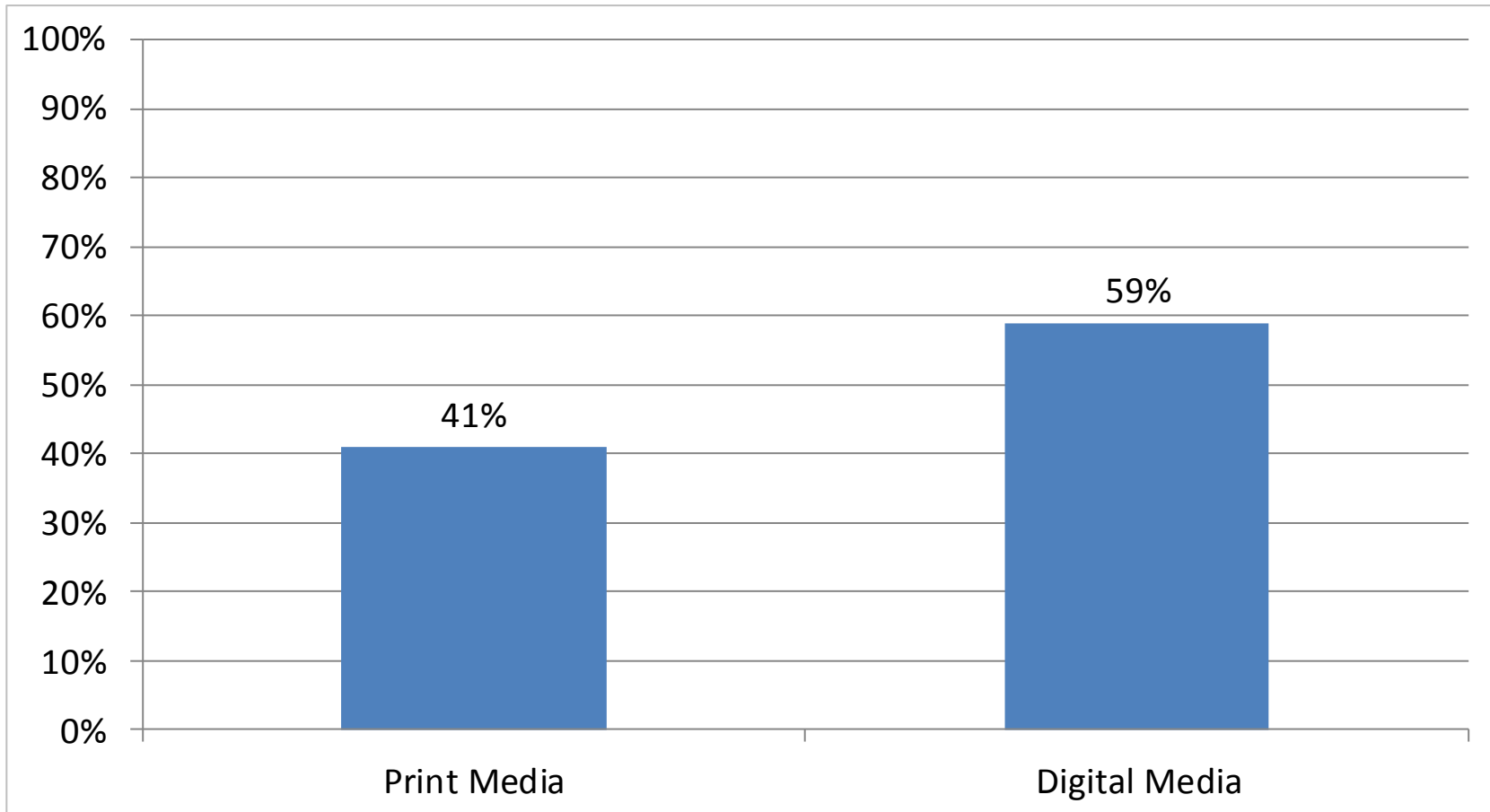


***Note:** This question was only included in the 2015 survey and therefore there is no comparison.

Special Feedback



Special Request 2: Print Media vs Digital Media



***Note:** This graph has been adapted from slide 14 to show which the respondents prefer, Print or Digital Media. Print Media includes the indicators “Newspapers/Magazines” and “Posters/Banners” while Digital Media includes the original indicator “Website/Internet” as well as other suggestions such as Apps and Social Media. The data only shows the preferences from the 2015 survey

Spend Breakdown



	2013	2015
Items	Amount	Amount
Accommodation	R1 081	R1 124
Food & Beverage	R207	R314
Transport	R297	R432
Souvenirs	R164	R753
Total Average Spend	R534	R1 346

When comparing 2013 and 2015 it is clear that the average spend across all categories, including the total average spend, has increased. Most of the categories have experienced a small increase apart from the average spend on accommodation and the total average spend. The total average spend has almost doubled and this may be due to various factors. These factors may be: an increased number of overnight and day visitors to the event (spend more than locals) as well as increased transport costs due to toll roads and petrol price increases.

Estimated Economic Impact: Participants & Spectators



	2013		2015	
	Overnight Visitors	Local and Day	Overnight Visitors	Local and Day
Participants				
Number	383	2 172	416	1 183
*Low Estimate	R356 488	R588 796	R 835 120	R 726 019
**Middle Estimate	R571 819	R821 668	R 1 215 910	R 937 918
***High Estimate	R787 150	R1 054 539	R 1 596 695	R 1 149 829
Spectators				
Number	600	3 400	915	2 603
*Low Estimate	R464 018	R800 331	R 819 639	R 1 079 698
**Middle Estimate	R1 041 720	R978 180	R 2 620 048	R 1 276 254
***High Estimate	R1 619 422	R1 156 029	R 4 420 457	R 1 696 818

*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

Note:

- 1) The spectators were based on the estimated figure of 3 518
- 2) The participants were based on the figure 1 599 of which included riders aged 18+
- 3) Therefore, the estimated overall attendance stands at **5 117**

Total Estimated Economic Impact: Visitors Only



	2013		2015	
	Direct Spend	Multiplier of 1,42	Direct Spend	Multiplier of 2
Low Estimate	R820 505	R1 165 118	R 1 654 759	R 3 309 517
High Estimate	R2 406 573	R3 417 333	R 6 017 152	R 12 034 304

*This is an estimate based on **overnight participants and spectators only**.

*It is also important to note that in 2013 the multiplier variable was 1,42 while in 2015 the new multiplier variable of 2 was used. Using the previous multiplier the total value would have been between R2.3mn and R8.5mn and this would still be more than double the overall value of the 2013 event in terms of spend.

Findings



- 1) In terms of the demographics, 51% of the respondents were female, while 49% were male. When looking at the participants only, 63% were male while 37% were female. In terms of the spectators, 69% were female and 31% were male. This then suggests that the majority of respondents, who were cyclists, were male. This was also the case in the 2013 survey and there were minor changes between the two years. It is therefore likely that the males ride and the females watch/support with a possible scenario being husband rides while the wife watches.
- 2) In terms of the age groups, the majority of the respondents were between the age categories of 30-39 (28%) and 40-49 (28%). There was a significant decrease (by 10%) in the number of respondents from the 40-49 age group yet there was an increase across the other age groups.
- 3) The event continued to attract respondents from outside the Howick/Midlands area as shown by 47% who were day visitors and 26% who were regarded as overnight visitors. In 2015, there was an increase in the number of overnight visitors (by 10%) along with a decrease in local residents (by 8%). This is a positive sign as visitors are more likely to spend more than locals.

Findings (cont'd.)



- 4) The majority of overnight visitors stayed in the area for 2 nights (53%) while 33% said that had stayed for only 1 night. There was an increase in those who stayed for 2 nights (by 15%) when comparing 2013 and 2015. This is one of the factors behind the increased average spend on accommodation and in the total average spend.
- 5) A large majority (87%) of the respondents were from within KZN while only 10% of the respondents came from Gauteng and 3% from the Free State. There were no significant changes when comparing 2013 and 2015 besides from a slight increase in respondents from the Free State.
- 6) The respondents were mainly in the area as a result of the event, particularly as participants (53%) and spectators (40%). Those who were regarded as support crew only accounted 5% of those interviewed. There were no significant changes here.
- 7) The 20km race was the most popular event as shown by 38% of the respondents who participated in it, even though there had been an 8% decrease. This was followed by the 40km race and 60km events at 32% and 12%, respectively. There were slight increases in the numbers for the other races, especially the Enduro race which was not available in 2013.

Findings (cont'd.)



- 8) When asked what had influenced them to attend the event, the respondents answered as follows: “Previous attendance/participation” (39%) and word-of-mouth (33%) played an important role in this regard. The internet and newspapers only played a minimal part. This finding is critical for the organizers of the event. It suggests that concerted efforts should be made towards ensuring that people are happy with the event as that would determine increased future attendance/participation.
- 9) The respondents were asked if they were satisfied with information that was provided prior to the event. 99% of respondents said they were satisfied. There were no changes here.
- 10) Even though some respondents were satisfied with information, they were asked regarding their suggestions for improving the marketing of the event in future. A large number of them did not have suggestions. However, a few of them suggested advertising the event on TV and radio.
- 11) Overall, 93% of the respondents said they would attend the event again. When breaking this down further, it was found that 94% of the participants and 90% of the spectators would attend in future. This is a positive finding for the organizers as it suggests that people were happy with the event.

Findings (cont'd.)



- 12) The event was still able to attract new spectators and cyclists as shown by 38% of the participants and 26% of the spectators who attended for the first time. There was a decrease of 19% in the number of spectators who were attending for the first time.
- 13) Some 95% of the respondents had either a 'good' or an 'excellent' experience. It is important to note that the riders contributed significantly towards the positive ratings. There was no significant change when comparing the results of 2013 and 2015.
- 14) It is positive to note that 91% of the respondents did not experience problems at the event. The problems that were experienced by 10% of the respondents were related to the following:
 - Bathrooms and toilets
 - No braai as per the newsletter(?)
 - Night race was abandoned(?)
 - Registration issues
 - Parking problems

Findings (cont'd.)



- 15) 100% of the respondents indicated that they would recommend the event to family and friends, particularly for the following reasons:
 - Beautiful area
 - Great family event
 - Enjoyable, well organized event

- 16) 100% of the respondents also said they would recommend KZN as a tourist destination to friends and family. The attributes of KZN were the main reasons for doing so. These attributes were:
 - Variety of attractions/activities found in the province
 - Good weather
 - The beach
 - Beautiful nature

- 17) Only 24% of the respondents were familiar with the Zulu Kingdom slogan. This number is the result of a significant decrease (by 45%) when comparing 2015 with 2013. The main associations included: “Zulu History/Heritage/King Shaka”, “KZN” and “Other”. The term “other” included associations with KZN’s famous attractions such as uShaka Marine World and it also includes “not sure”.

Findings (cont'd)



- 18) It is a negative finding for TKZN in that the slogan was not associated with “tourism/holidays” as much as the others. In addition to this, it is a negative finding that the noting of the slogan has decreased by a significant amount.

- 19) Even though there was minimal TKZN branding at the event, it was pleasing to note that 72% of those interviewed had seen the TKZN logo prior to the event. Respondents had noted the logo at the following places: “Various towns such as Howick”, “Airport” and “Other” such as accommodation establishments. It is positive to note for TKZN that the noting of the logo had increased by 17% between 2013 and 2015 as this is not often the case.

- 20) Generally, the respondents were satisfied with the event. They also provided suggestions for further improving it in future. Some of the ideas were:
 - Set up a kids’ play area
 - Set up shaded areas
 - More healthy food options (i.e. wider varieties)
 - Better communication from race organizers
 - Entertainment for the spectators while the riders are out on the course
 - Electrical points needed in the camping areas

Recommendations



It is important that the issues raised by the respondents are addressed. This will help in sustaining and increasing the satisfaction levels of those who attended. Increased satisfaction will result in continuous attendance and create positive awareness about the event.

In this regard, the following recommendations for the **organizers** were made:

- 1) More events and entertainment throughout the weekend – i.e. braais, live bands, a farmers market, flat screens for sport and a “craft beer setup”
- 2) Introduce a wider variety of food options – with healthier, vegetarian and “banting” options being top priorities
- 3) Promote and encourage a wider variety of accommodation options in the region/area in order to enhance the “festival” reputation and to increase the length of stay – thus increasing the economic impact
- 4) With regards to accommodation options, it was recommended that the camping area should be enhanced to encompass a larger area which would encourage more people to camp for the entire weekend.
- 5) Attention needs to be given to the seeding process on race day and it should be linked with the “qualifying races” (as suggested by a respondent). Some faster riders are placed among slower riders at the back of the fields and this was a cause for frustration of the faster riders.

Recommendations (contd.)



- 6) It is recommended that there should be more merchandise/cycling products on sale and a good example to follow (obviously in a smaller capacity) would be the Comrades Expo. This will not only increase the “festival/weekend” feel of the event, but more importantly it will increase the spend of all visitors.
- 7) Although there was ample parking space for everyone, the distance between the parking area and the starting area was said to have been quite far for some. Therefore, for the spectators (most participants ride their bikes to and from the parking) it could be recommended that there is some form of “park-and-ride” system. Local tractors could even be used.
- 8) In terms of the accommodation establishments in the area, the following is recommended:
 - ✓ Establishments, especially those who are not that well supported, could offer discounts to all participants and their spectators.
 - ✓ The establishments that are located further away from the event could offer their guests a “shuttle-type” service which would see them transport them to the start of the event. This would also alleviate any parking/traffic issues.
 - ✓ The event’s website, as well as their social media pages, should list all the available accommodation establishments (and specials) so that more people are encouraged to stay overnight. Other organizations, such as ROAG, should also do this.
 - ✓ This report should be sent to these establishments so that they may realise the value of this event.

Recommendations (contd.)



- 8) Some additional key suggestions of aligning the event as a **“weekend” event or “festival”** include the following:
- ✓ An enhanced/larger “Kids Zone” which could have pony/donkey rides (from the local area) and even a petting zoo along with jumping castles and ball pits;
 - ✓ Promotion of a camping area that includes comforts similar to a guest house (i.e. warm showers, electrical points, washing up areas etc.). A good example to follow (on a smaller scale) would be the Sani2C/Cape Epic’s camping set up;
 - ✓ Enhance the idea of having massages for spectators or other activities that the families can get involved in while they watch. This will make the “weekend away” feel even stronger;
 - ✓ Demonstrations could be conducted throughout the Saturday which would allow the participants/potential participants to learn more about the sport that they love. This would therefore increase the interest in the event and attract more participants;
 - ✓ Competitions, giveaways and “expo specials” should be introduced in order to encourage people to hang around for the entire festival;
 - ✓ People should be encouraged to make use of the wide variety of accommodation establishments in the area – this would encourage even PMB visitors to stay at least one night (see also for TKZN on the next slide)

Recommendations (contd.)



The following recommendations have been selected for **TKZN**:

- 1) TKZN should assist SAPPI and the organizers in promoting the local accommodation establishments along with other activities/attractions in the area. Not only would this encourage more people to stay longer but by knowing what to do in the area would further enrich their experience. Both of these factors would essentially increase the average spend of the visitors.
- 2) As was the case in other 2015 events, TKZN should be lobbying strategies to increase awareness of our branding – i.e. our slogan and logo. Even though the logo seemed to have been noted more in 2015, the places where it was noted need to be aligned with TKZN's marketing strategies. Furthermore, the lack of association of the TKZN slogan with “tourism/holidays” is still a cause for concern.