

Midmar Mile 2015 Impact Assessment: Top Line Summary Report



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Positive Highlights



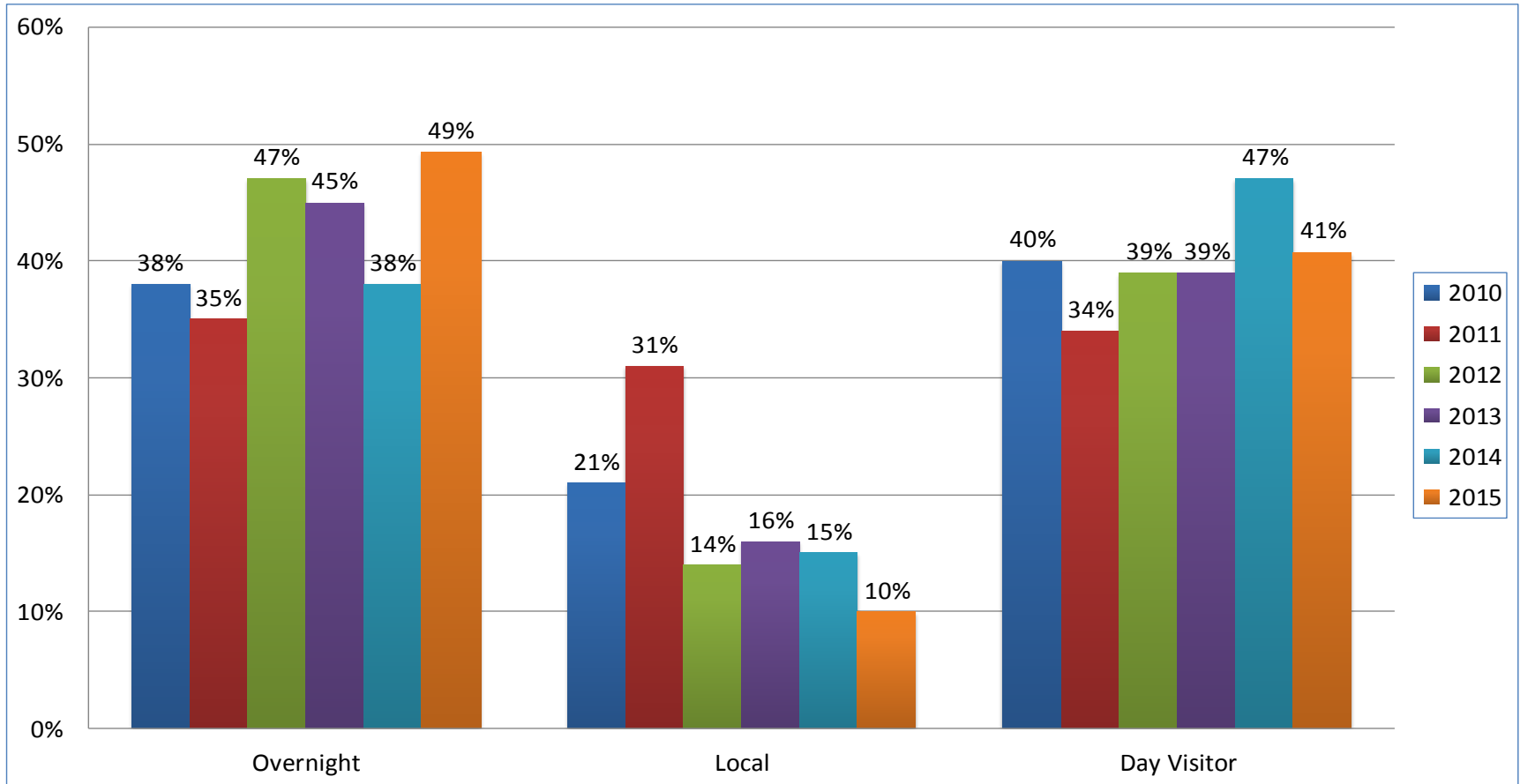
- 90% of the respondents were visitors to the region.
- 99% indicated that they were satisfied with the information provided.
- 97% said they would attend the event again.
- 87% of the respondents had attended the event before, which is a statistically significant increase, compared to 2014 (74%). This shows the ability of the event to maintain consistent participants.
- The majority of the respondents (99%) said they had either a *good* or an *excellent* experience at the event.
- 95% did not experience any problems at the event.
- 100% of the respondents indicated they would recommend the event to family and friends.
- 100% of those interviewed also indicated that they would recommend KZN as a tourist destination to family and friends.
- 63% of all respondents believed that the event was very well marketed.
- There were approximately 20 participants who were from international countries, with highest number coming from the United Kingdom (UK).

Methodology



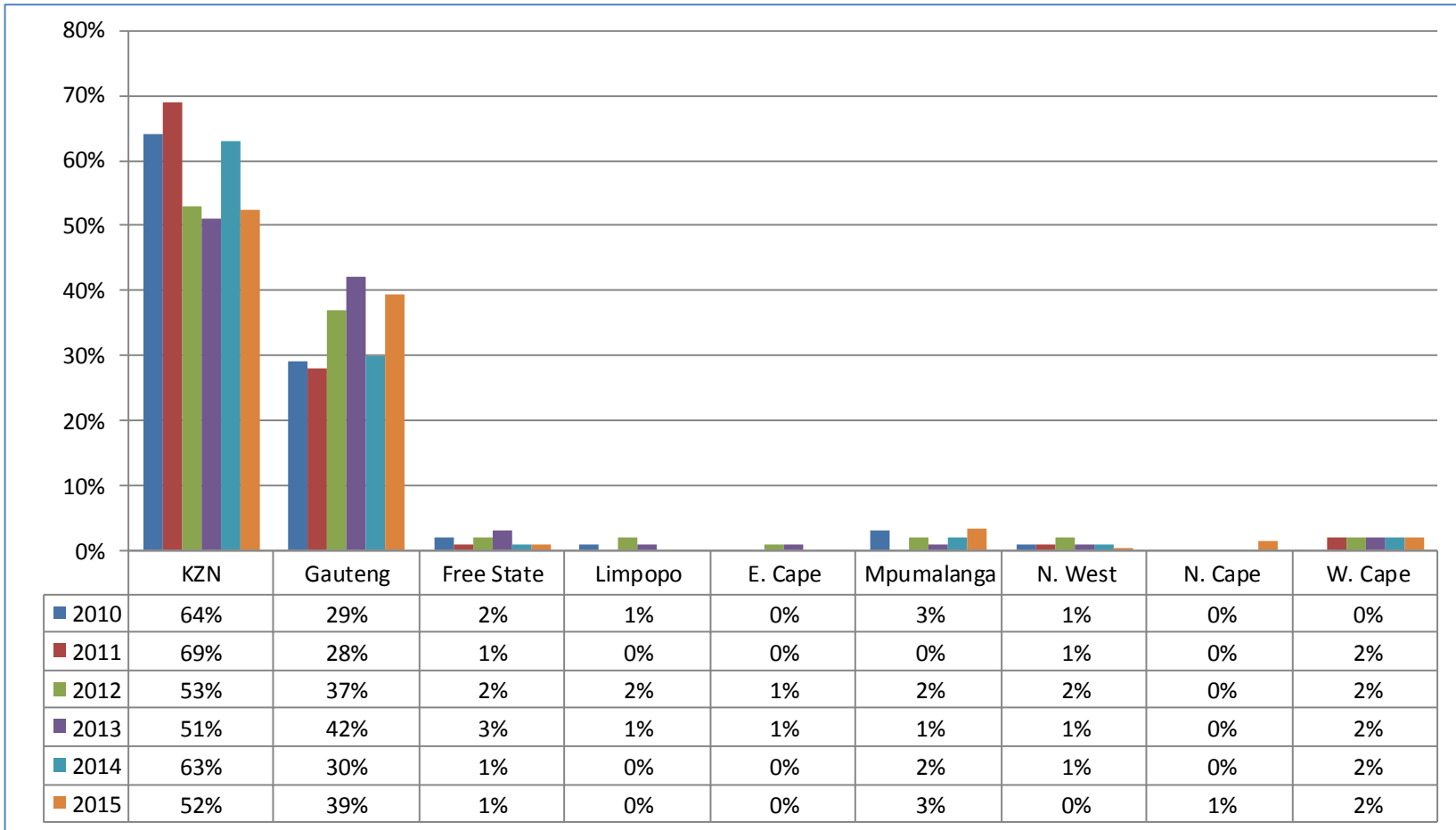
- Face-to-face survey with a probability sample of 216 respondents over the 2 days of the event, 7-8 February 2015.
- Respondents were systematically selected throughout the 2-day period of the event.

Nature of Midmar Mile Participants and Spectators



No statistically significant decline of overnight or increase in the day visitor respondents was noted. However, there was a significant increase in the amount of overnight visitors as well as a decrease in day visitors, when comparing 2014 and 2015.

Provinces



It appears that there was a decrease in KZN visitors and an increase of visitors from Gauteng, however, there was no statistically significant difference when comparing 2014 and 2015.

Participants and Vehicles



	2010	2011	2012	2013	2014	2015
Participants	16 000	16 210	16 007	16 487	16 919	13 298
Vehicles	7 123	7 054	7 602	7 598	*7 700	5 655

*estimated, data not available.

From 2010-2015, the number of participants were supplied by the organizing committee of the Midmar Mile and the vehicle numbers were supplied by Ezemvelo KZN Wildlife (estimated in 2014).

In 2015: 5 485 cars, 130 kombis, 19 small busses and 21 large busses entered the reserve during Saturday, the 7th of February and Sunday, the 8th of February 2015.

Group Size and Spectator Estimate



	2010	2011	2012	2013	2014	2015
Average Group Size	3.6	4.3	3.8	3.9	3.6	3.3
Estimated Overall Attendance	25 643	30 322	28 888	29 632	27 720	18 662
Estimate Spectator Attendance	9 643	14 122	12 881	13 145	10 801	5 364

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Estimated Economic Impact - Participants



Year	Overnight Participants	Local and Day Participants
2013		
Number	5 120	5 120
*Low Estimate	R12 112 621	R2 654 336
**Middle Estimate	R15 153 152	R3 764 736
***High Estimate	R18 193 683	R4 875 136
2014		
Number	4 580	7 473
*Low Estimate	R8 757 954	R3 899 863
**Middle Estimate	R11 847 631	R6 690 010
***High Estimate	R14 937 300	R9 480 139
2015		
Number	6 516	6 782
*Low Estimate	R 19 046 268	R 3 126 502
**Middle Estimate	R 27 960 156	R 6 388 644
***High Estimate	R 36 880 560	R 7 446 636

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

**No Margin of Error

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

Estimated Economic Impact – Spectators



Year	Overnight Spectators	Local and Day Spectators
2013		
Number	5 283	7 862
*Low Estimate	R15 319 319	R4 362 070
**Middle Estimate	R18 451 406	R5 618 185
***High Estimate	R21 583 493	R6 874 301
2014		
Number	3 672	7 128
*Low Estimate	R11 816 086	R5 318 251
**Middle Estimate	R14 786 472	R8 944 729
***High Estimate	R17 756 854	R12 571 199
2015		
Number	2 628	2 736
*Low Estimate	R 9 019 296	R 1 094 400
*Middle Estimate	R 12 969 180	R 1 430 928
***High Estimate	R 16 919 064	R 1 768 748

*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

Total Estimated Amount Spent



	2010	2011	2012	2013	2014	2015
Low Estimate	R24 984 876	R29 249 648	R35 854 363	R34 448 346	R29 792 155	R 32 286 466
Middle Estimate	R34 037 077	R39 298 318	R43 609 277	R42 987 479	R42 268 844	R 48 748 908
High Estimate	R43 089 278	R49 354 437	R51 364 190	R51 526 612	R54 745 493	R 63 015 008

Note: This includes spending by both visitors and locals

Total Estimated Economic Impact



	Direct Spend	Multiplier of 1.42	Multiplier of 2.0
2013			
Low Estimate	R27 431 940	R38 953 355	R54 863 880
High Estimate	R39 777 176	R56 483 589	R79 554 352
2014			
Low Estimate	R20 574 040	R29 215 137	R41 148 081
High Estimate	R32 694 154	R46 425 699	R65 388 309
2015			
Low Estimate	R 28 065 564		R 56 131 128
High Estimate	R 53 799 624		R 107 599 248

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

Spend Breakdown

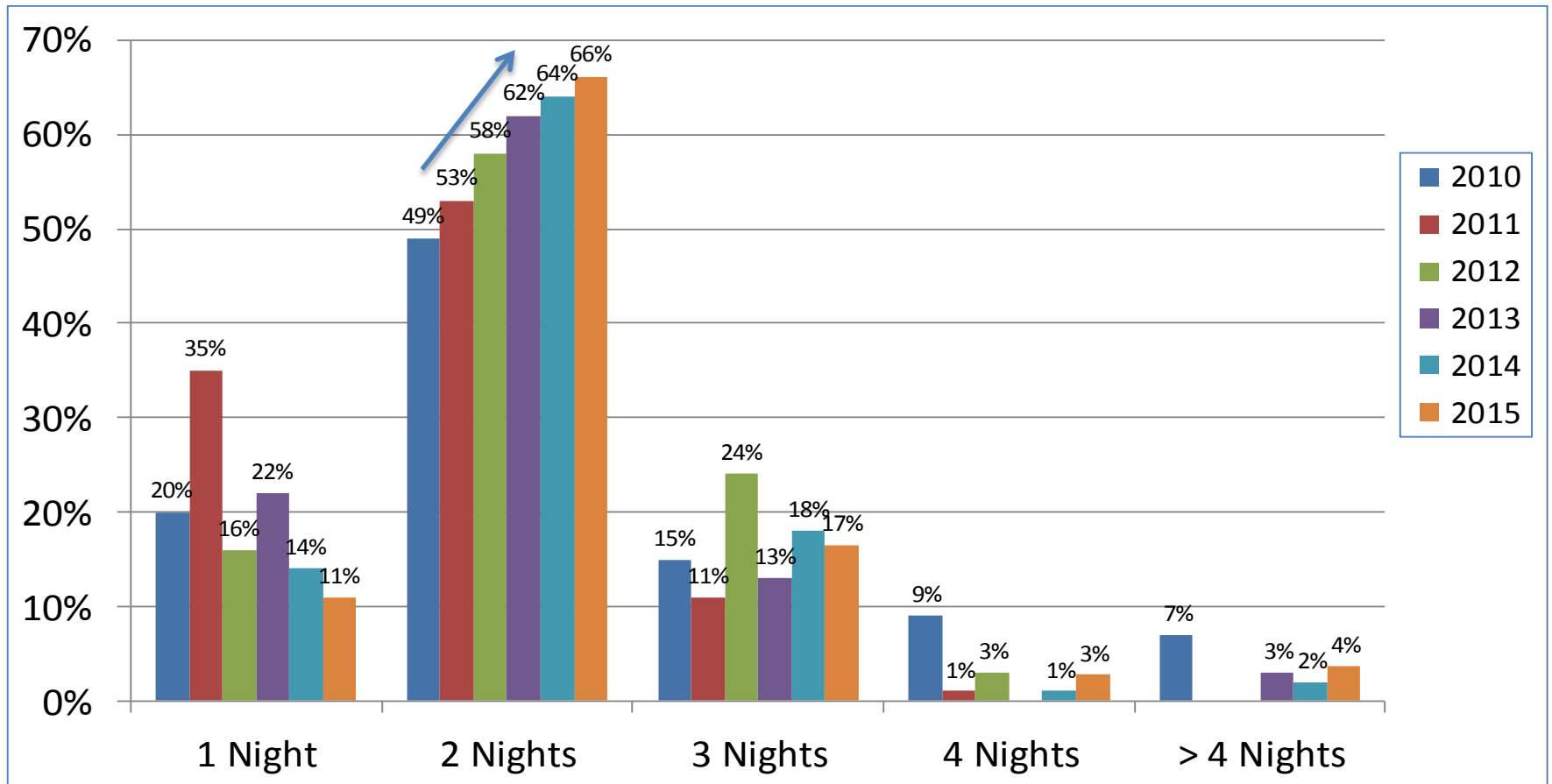


Items	2010	2011	2012	2013	2014	2015
Accommodation	R2 251	R1 248	R2 048	R1 769	R1 573	R1 726
Food & Beverage	R416	R343	R598	R502	R667	R1 295
Transport	R553	R501	R841	R627	R789	R1 333
Entertainment	R321	R323	R380	R337	R488	R176
Souvenirs	R225	R286	R457	R373	R508	R169
*Total Average Spend	R1 557	R1 412	R2 324	R1 832	R2 408	R1 972

*This is the total average spend for each year taking into account all the spend items. Therefore, the numbers in each column will not necessarily add up to this figure.

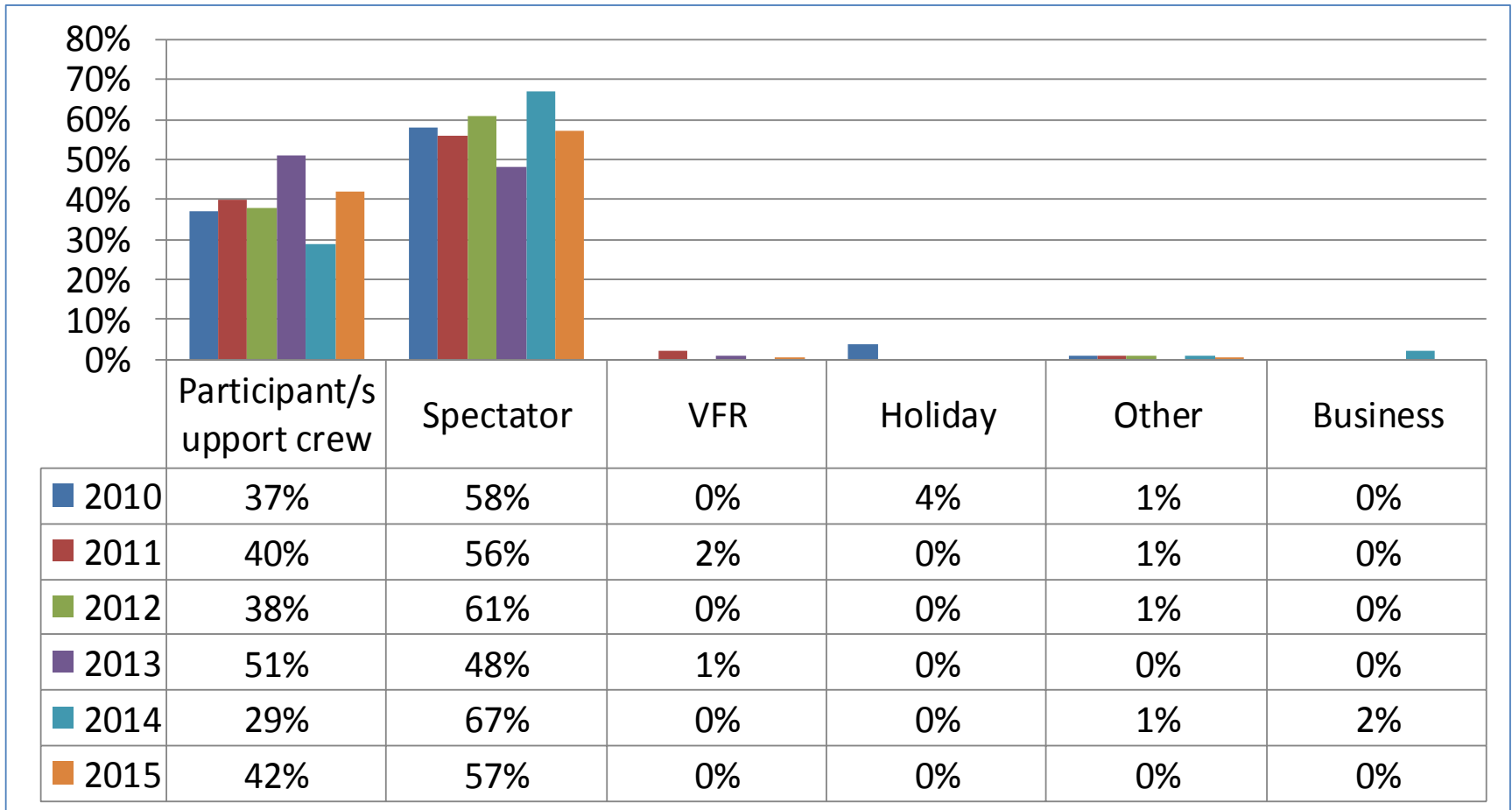
There was an decrease in the Total Average Spend between 2014 and 2015. This is most likely due to the fact that the overall attendance of the event had decreased along with the amount of both spectators and participants. However, the decrease of the average spend is by no means drastic and it compliments other statistics, such as the increased number of overnight visitors and it could also be contributed to the increase of traveling costs (petrol hikes and toll fees), as indicated in the table above.

Length of stay – All Respondents



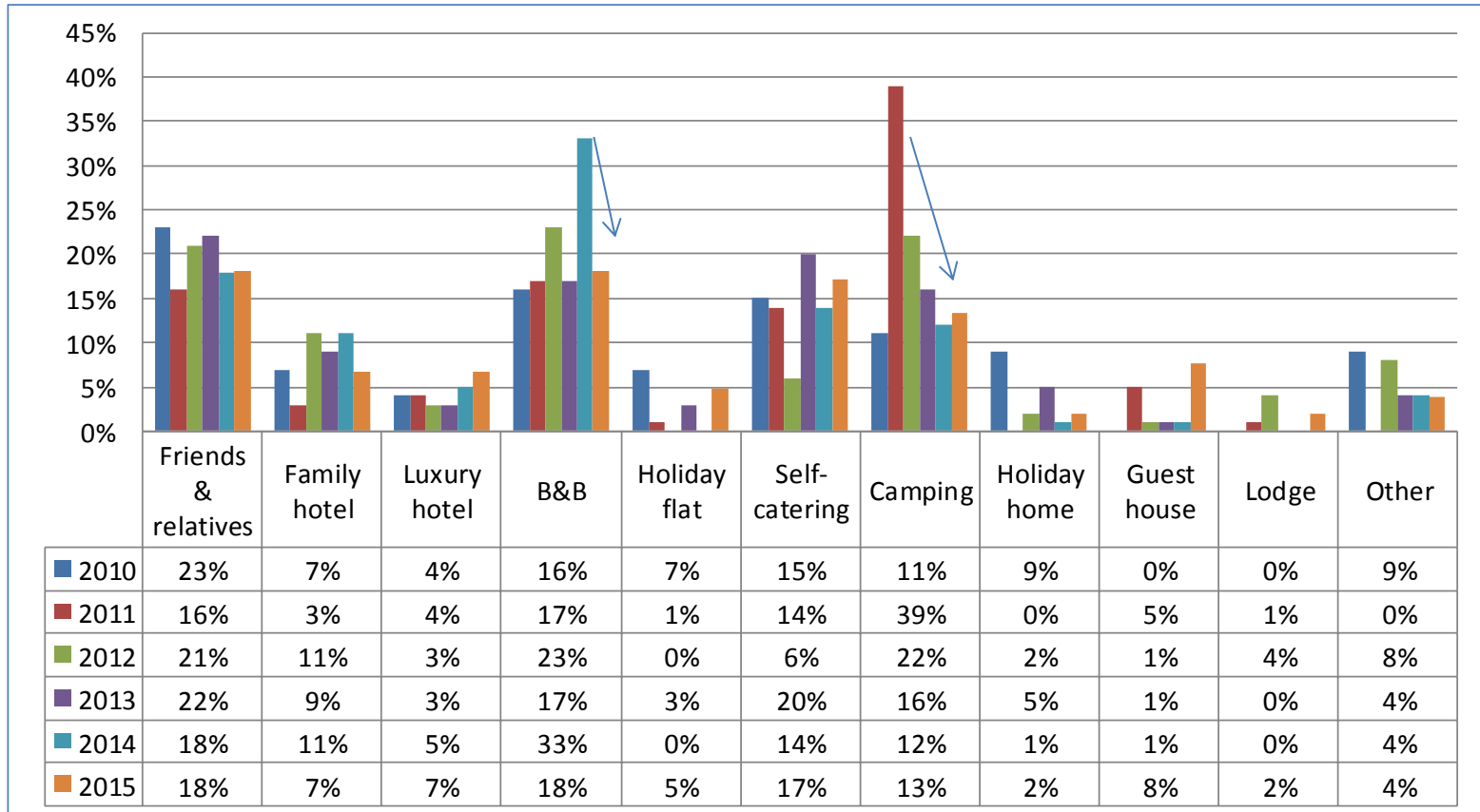
There has been a steady increase in the proportion of respondents who stayed 2 nights from 2010 to 2015. It is clear that there was a small decrease in the proportion of respondents who stayed for 1 night between 2014 and 2015. It is also clear that respondents stayed only for the event.

Primary Reason



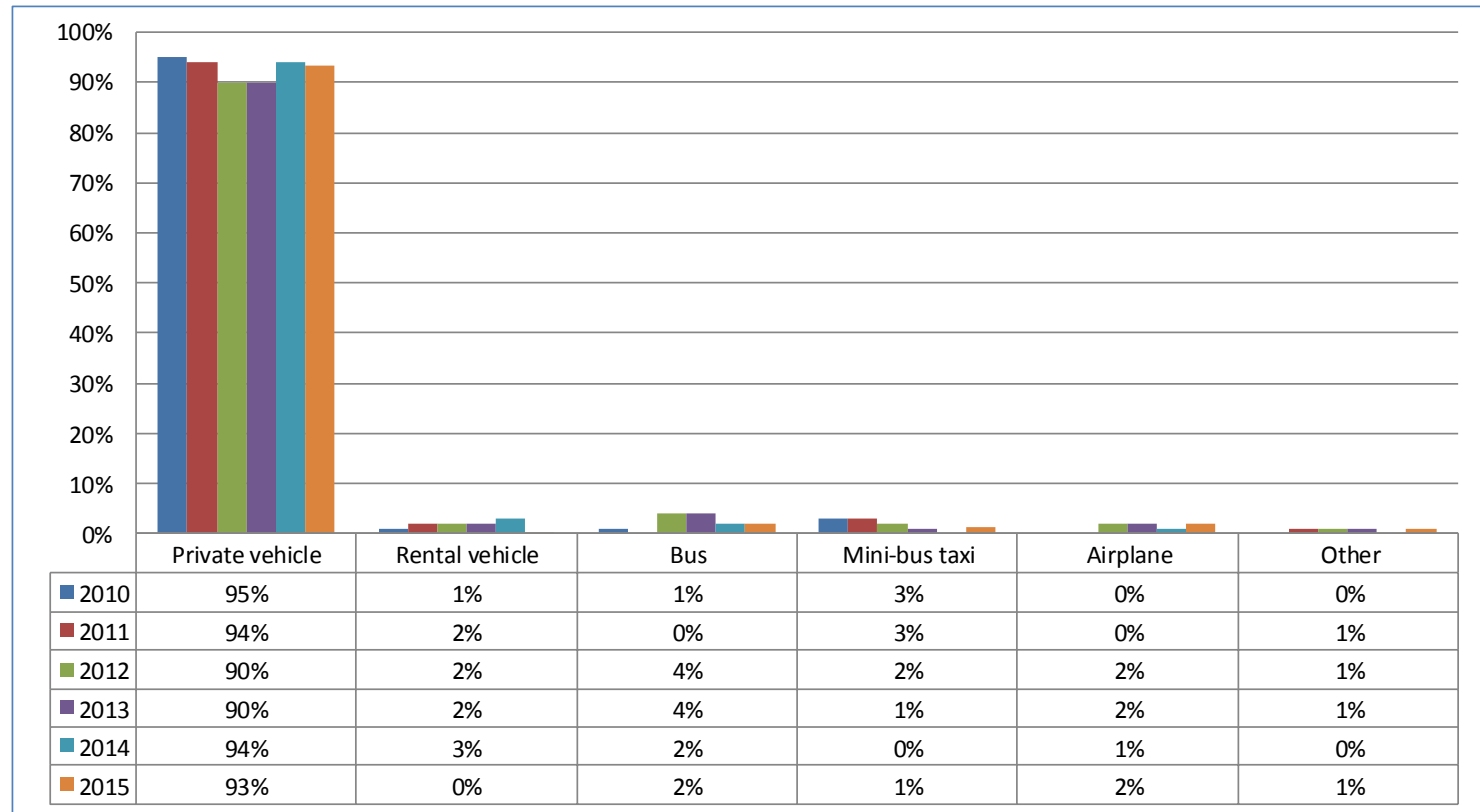
Respondents were in the area mainly due to the event taking place. There was a significant increase in the percentage of respondents who took part in the event between 2014 and 2015. There was a slight decrease in the number of respondents who were at the event as spectators between 2014 and 2015,.

Accommodation



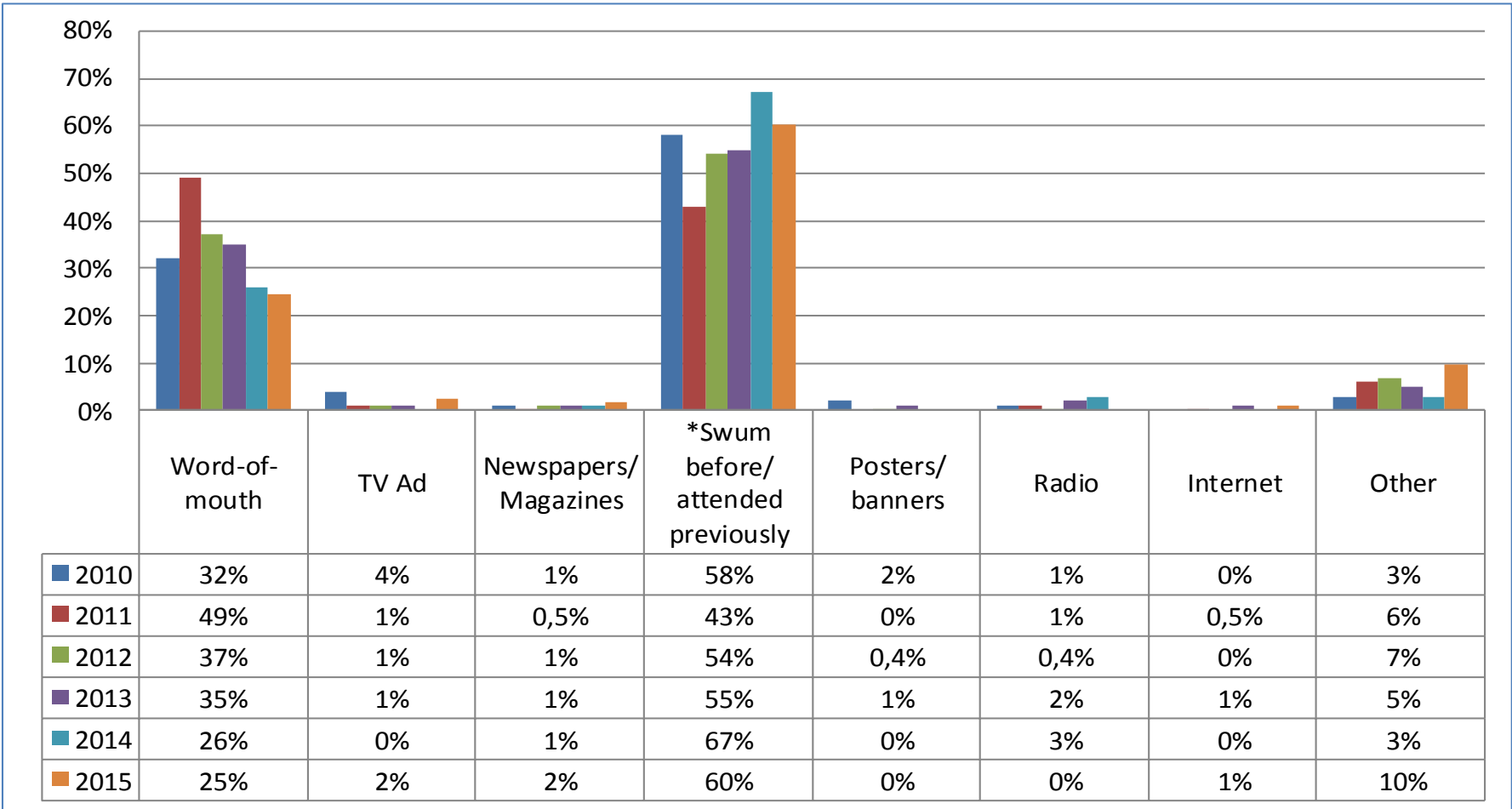
There appears to have been a significant decrease in the use of B&B accommodation between 2014 and 2015. There has also been a gradual decline in the use of camping accommodation between 2011 and 2015. However, a Z-test could not be performed to confirm this assessment as the responses for 2015 were below the minimum number required to carry out such a test. Therefore, direct comparisons could not be made between the 2014 and 2015 events.

Transport to Event: Non-Residents



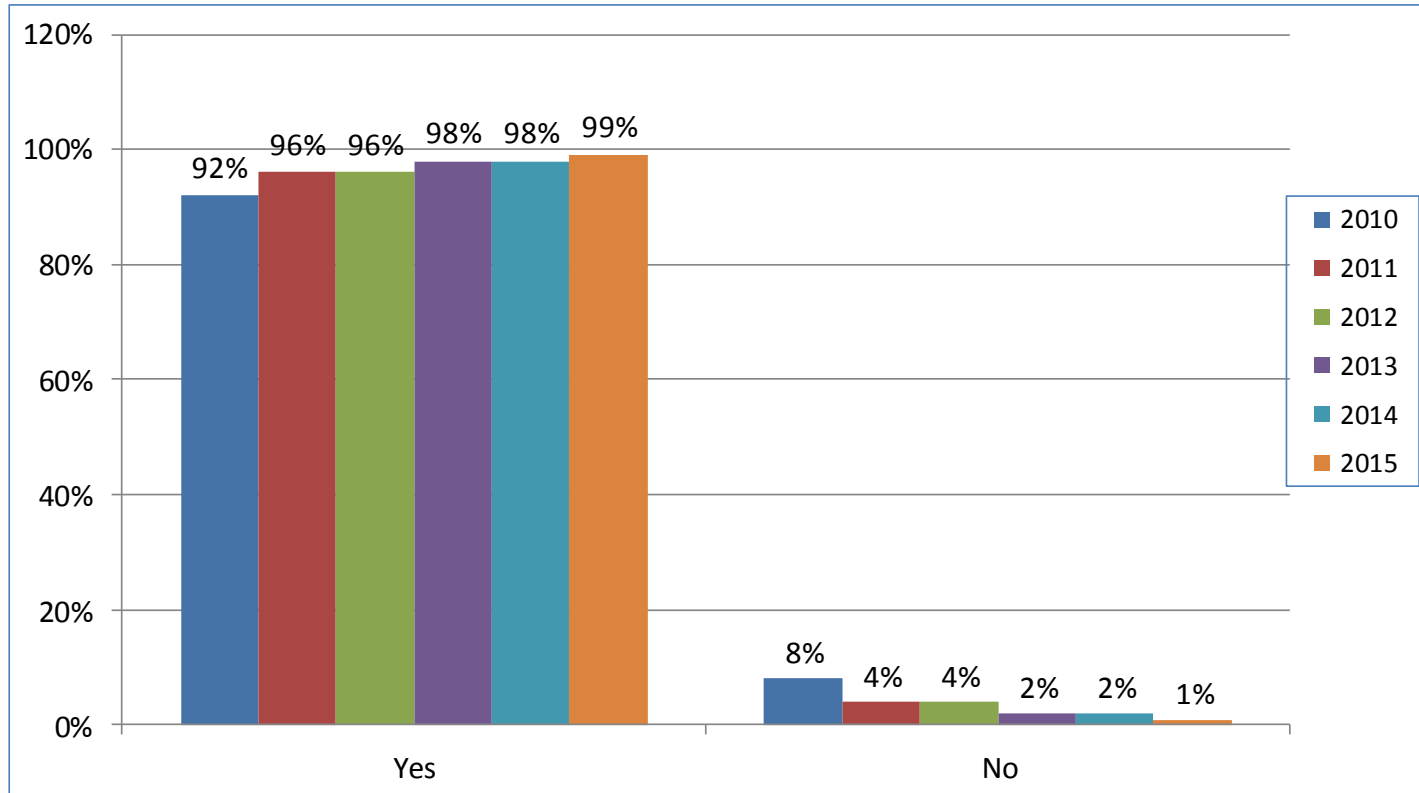
Most respondents used private vehicles to attend the event. This is a cause of the traffic problems experienced at the event. There were no other significant changes.

Influenced to Attend?



“Word-of-mouth” and “attended previously” continued to be the highest influencing factors for people to attend/participate at the Midmar Mile. There has been a continuous and slight decline in the “word-of-mouth factor”. There are no other statistically significant results.

Information Satisfaction



As shown above, the majority of respondents were satisfied with information provided regarding the event.

Marketing Improvement Suggestions:



SUGGESTIONS	2014	2015
It is well marketed/advertised	11%	63%
Advertise on TV	14%	10%
Advertise on radio	10%	4%
Advertise in newspapers	3%	3%
Use the internet	3%	1%
Market the event at school level/ underprivileged schools	5%	2%
Market the event nationally	2%	3%
Advertise it through the information centres	2%	-
More advertising	-	5%
More advertising around PMB and the Midlands	3%	-
More aggressive marketing	-	1%
More posters	-	-
Posters at the toll gate	-	2%
Helicopter banners	-	-
Advertise in townships	-	1%

The general response has revealed that the majority feel that the event was well marketed.

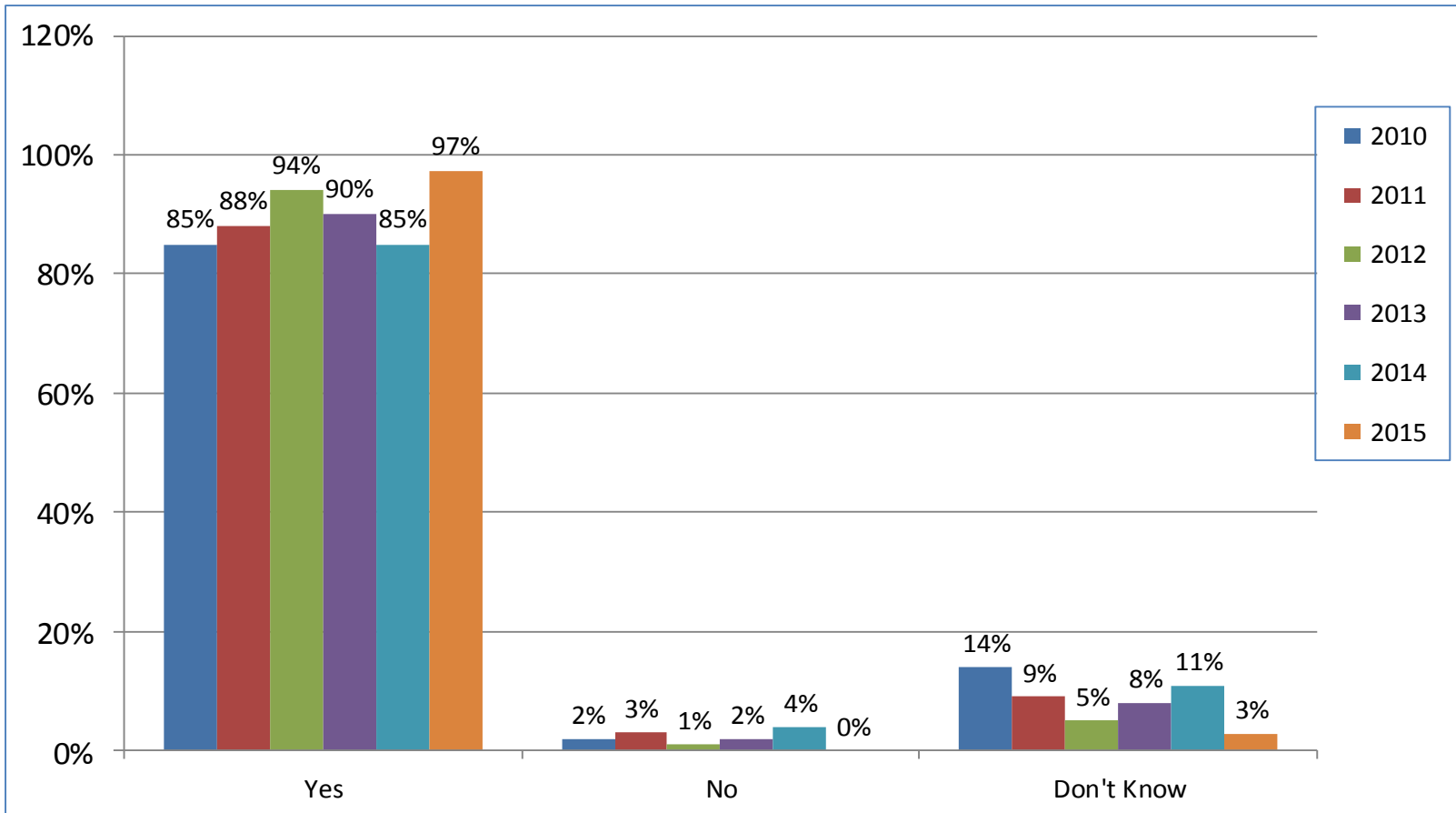
There was a change in the manner in which respondents feel the event can be better marketed. This is not necessarily that the event is not well marketed, but that more options and ideas are being put forward. The use of social media is one such new idea that has gained traction.

Marketing Improvement Suggestions: 2013 (cont'd)



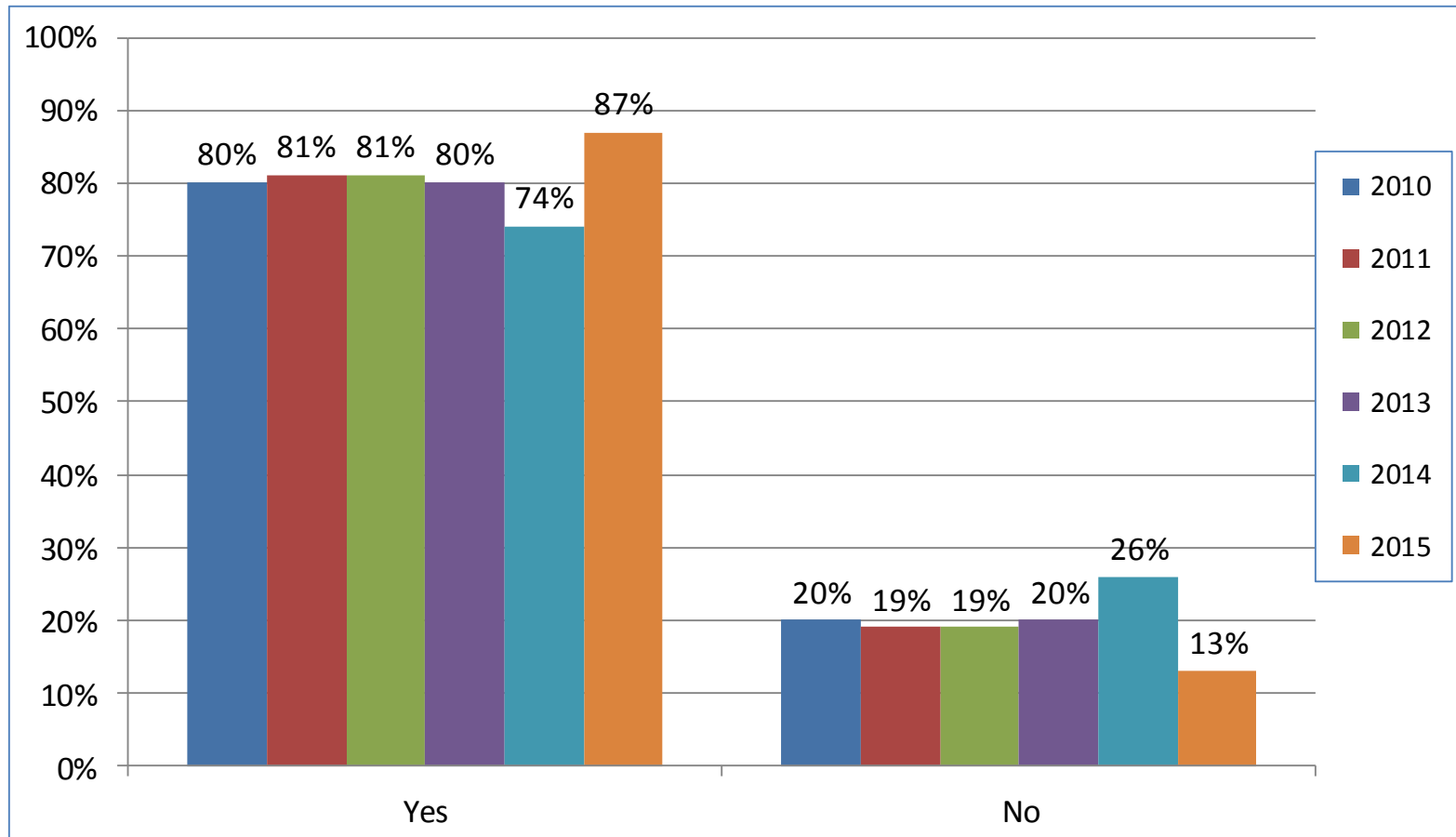
SUGGESTIONS	2014	2015
Provide information regarding entry fee	-	-
Advertise the event early	-	-
Advertise the event on African radio stations	-	1%
Advertise more on social networks	1%	2%

Attend Again?



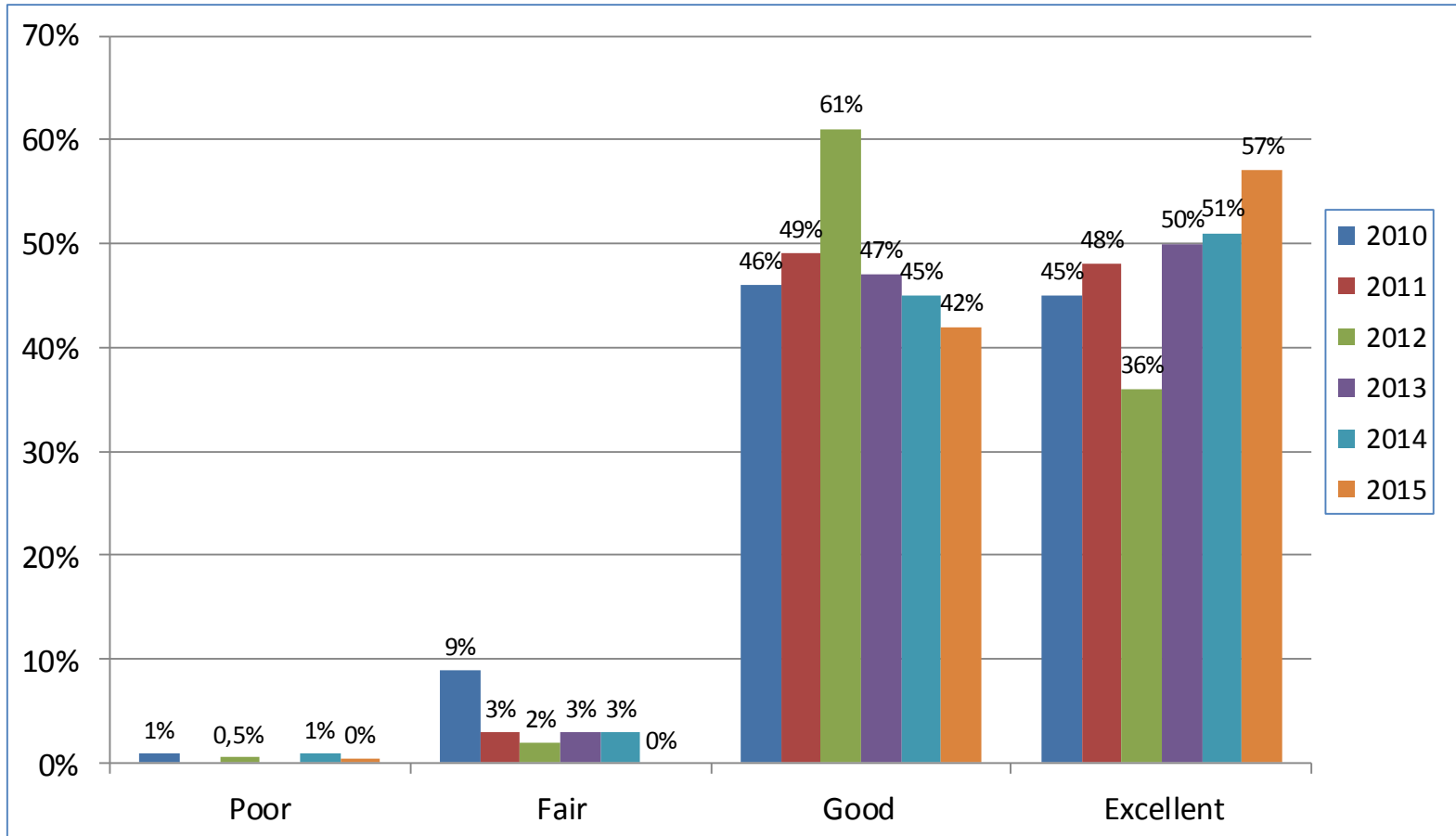
Almost all of the respondents suggested that they will attend the event again. In addition to this, none of them answered “No” to whether they will be attending the event again. Therefore, it can be said that the event is managing to influence participants to return to the event in the following year.

Attended in Previous Years?



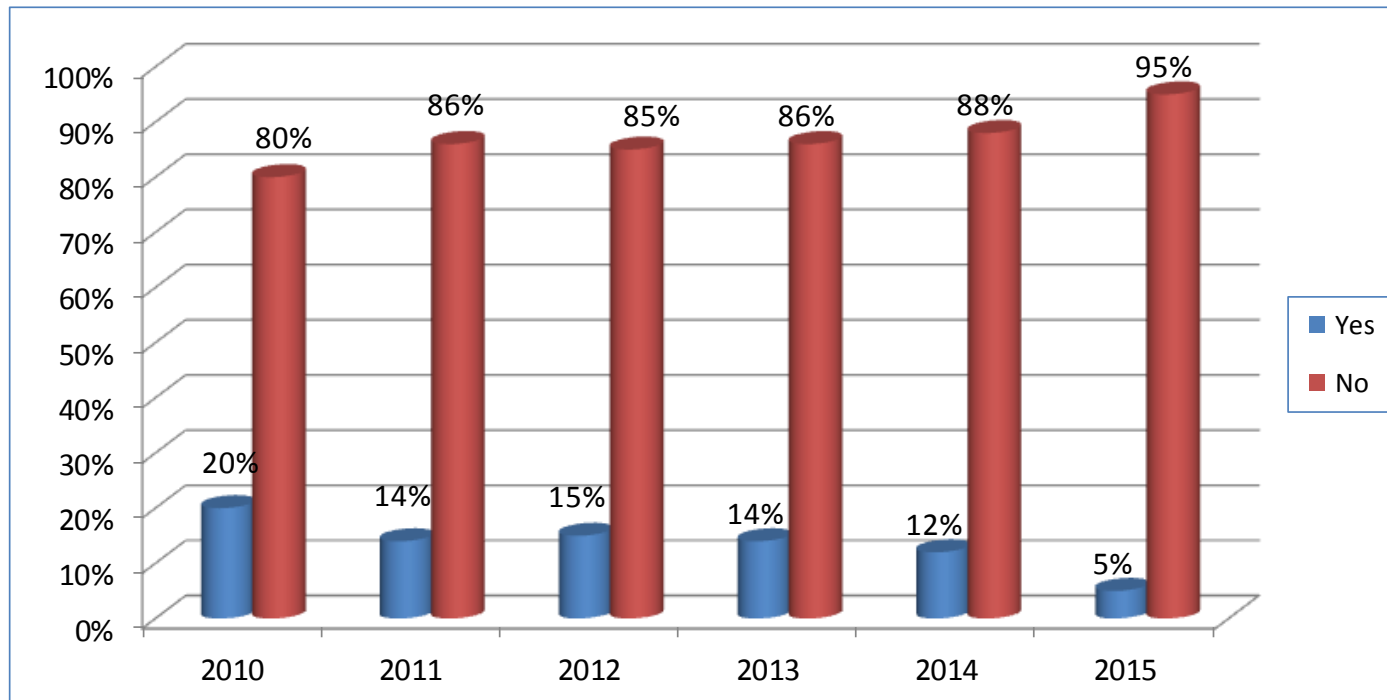
There was a significant growth in the amount of people who had already attended the event before, and there was a decrease in the amount of people who had not attended the event before. This shows that more and more people are attending the event again, but also that the event is not attracting large numbers of new attendees.

Experience Rating



Most of the respondents had a 'good' or 'excellent' experience at the event. This shows that the event was well organized. There was a steady increase of the 'excellent' perception from 2013 to 2015.

Experience Problems?



There was a significant increase in the amount people who did not experience any problems. This shows that the organizers have continued to note the problems experienced in previous years in order to decrease these problems for the events that follow.

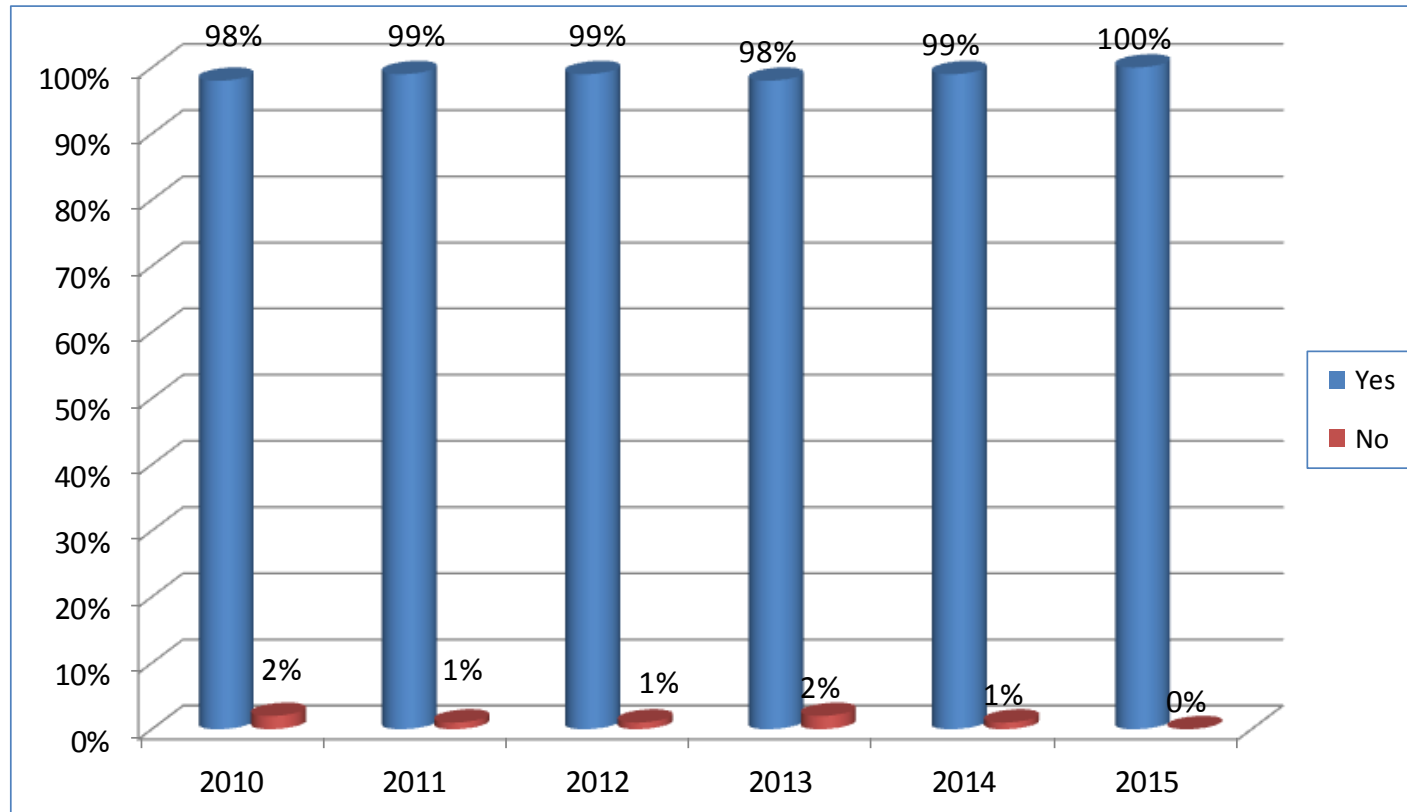
Problems Experienced: 2015



Some of the problems that were experienced are as follows:

- 1) Shortage of bathrooms and ablution facilities
- 2) Parking fees charged
- 3) Lack of facilities for disabled persons
- 4) Lack of ATMs
- 5) Minimal signage to the event

Recommend the Event to Family & Friends?



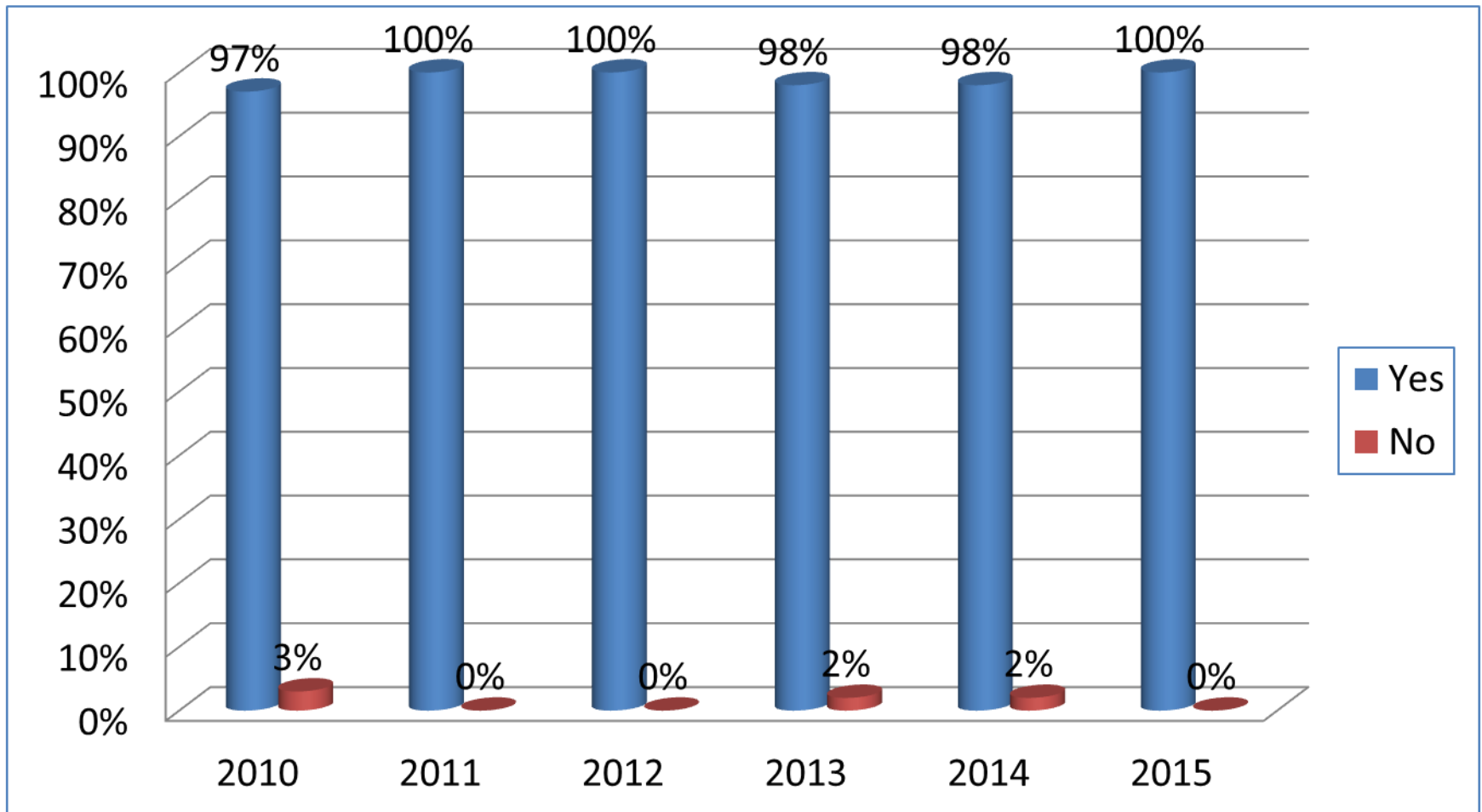
Reasons for Recommending the Event



Respondents cited the following reasons for recommending the event:

- Fun and well organized
- Good day out
- Much to do at the event
- Very good swimming event
- Good for the family and to get outside
- Fun/enjoyable
- Excellent environment
- Great atmosphere and pleasant experience

Recommend KZN as a Tourist Destination to Family & Friends?

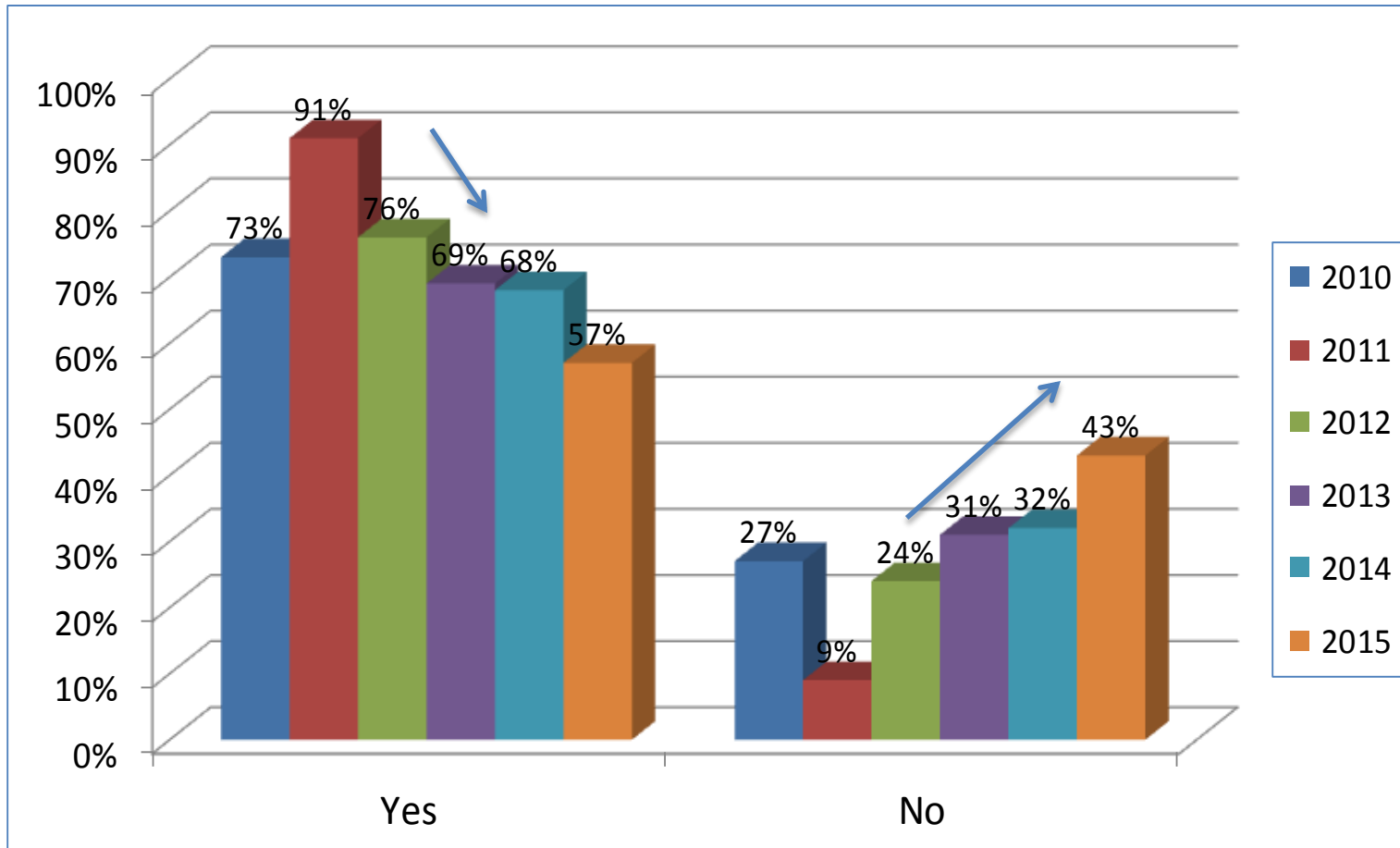


Reasons for Recommending KwaZulu-Natal as a Holiday Destination



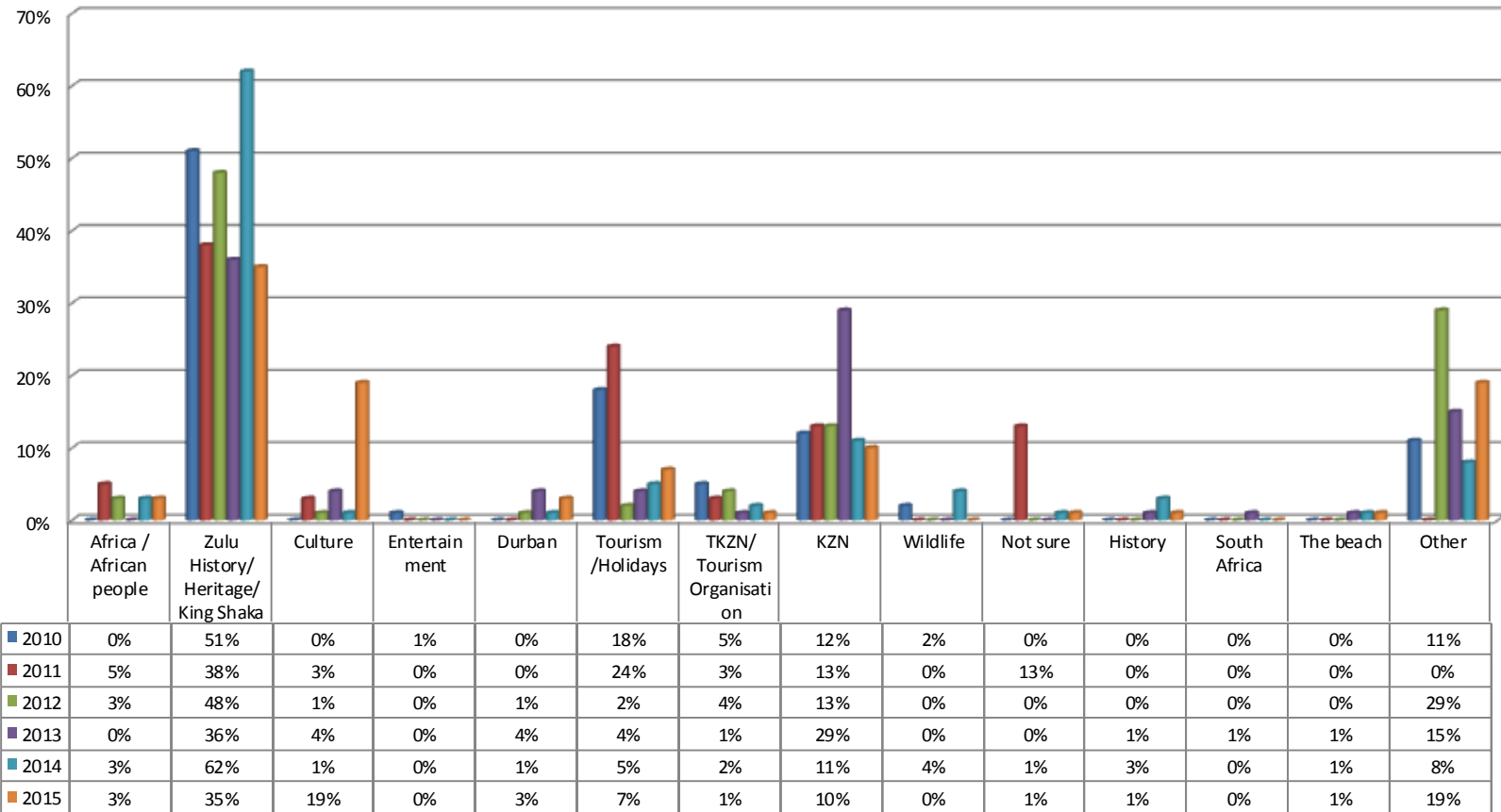
- ❖ Attractions
- ❖ Variety of things to see and do
- ❖ Beaches and surfing
- ❖ Good weather/climate
- ❖ KZN is beautiful
- ❖ “A gem of an area”
- ❖ Offers plenty of opportunities for relaxation
- ❖ Various tourism activities and attractions
- ❖ Friendly people
- ❖ Cultural attractions
- ❖ Wildlife

Familiar with Zulu Kingdom Slogan?



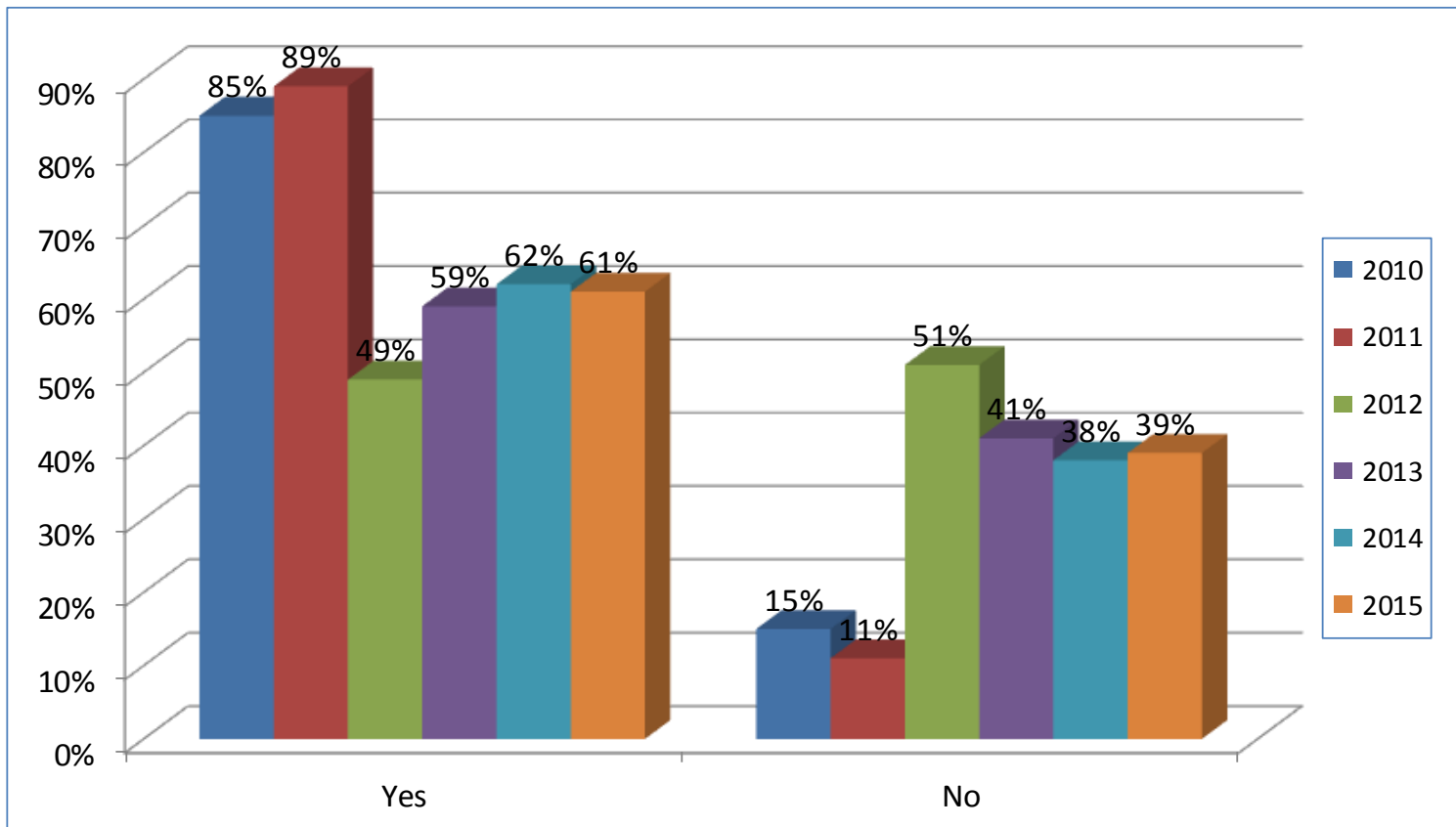
There continues to be a decline since 2011 in the level of familiarity with the TKZN slogan. The slogan, “Zulu Kingdom. Exceptional” was only introduced during 2011 and it is therefore evident that people would take time to become familiar with it from this year onwards. However, the familiarity has continued to decline and this is considered as a cause for concern.

Associations - Zulu Kingdom Slogan: Core Mentions



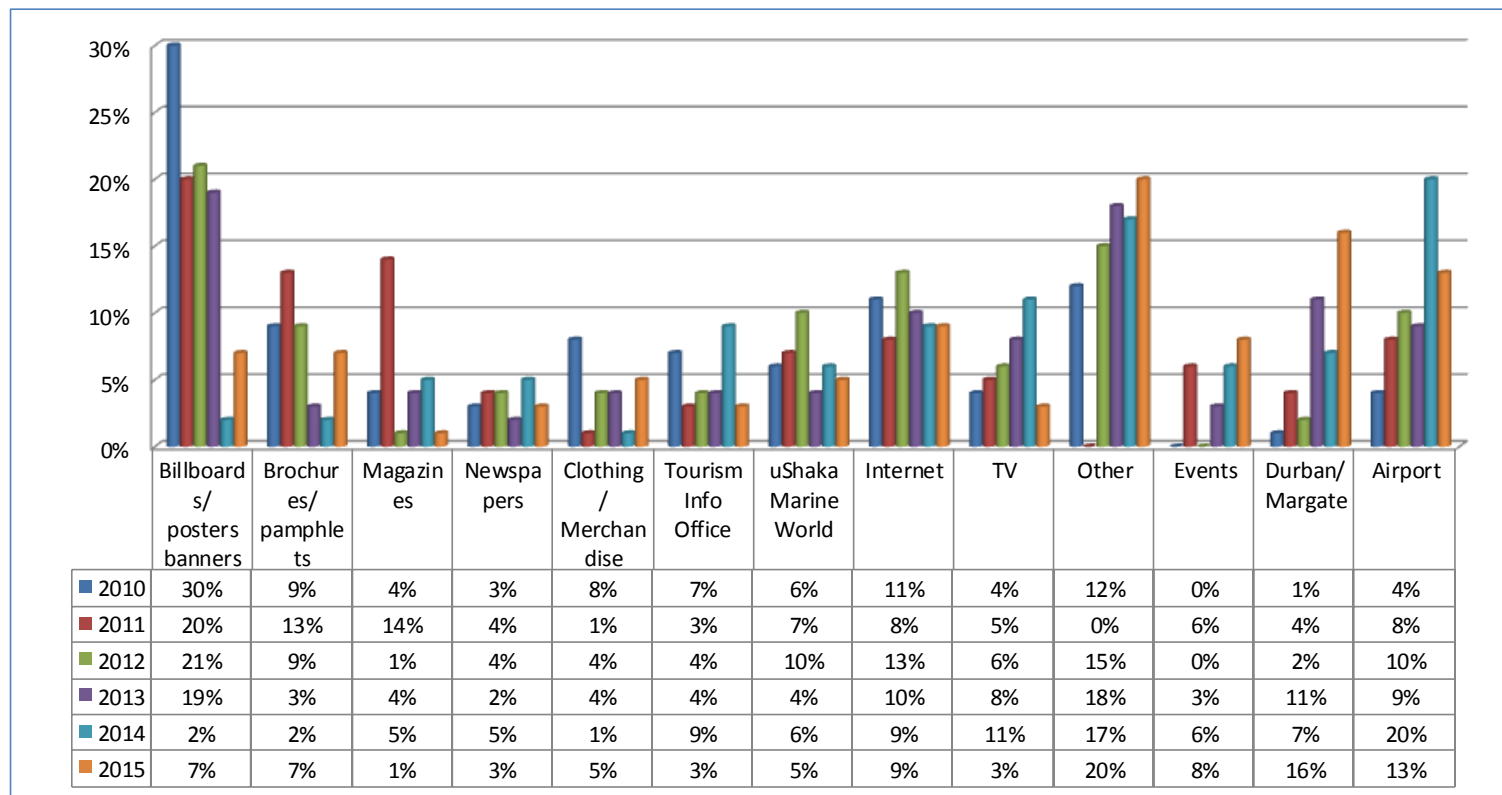
The association of the slogan with Zulu culture and heritage has experienced a major decline. The lack of association with a tourism destination, activities (such as wildlife) or holidays is of concern, considering that the slogan is a few years old. However, the association with holidays and tourism is gradually increasing.

Noted Zulu Kingdom Logo?



There is an increase in the number of respondents who have noted the logo since 2012, showing that the new logo is being more widely recognized. However, this might also be due to respondents thinking they have seen the 'Zulu Kingdom' logo before, whereas it may well have been the SAT logo, or even the SA flag.

Where Zulu Kingdom Logo Noted?



There has been a decline in certain areas where the logo has been noted. For example, between 2013 and 2014, the respondents who have noted the logo on 'billboards/posters/banners' has declined from 19% in 2013 to 7% in 2015. However, there has been an increase in the number of respondents who have noted the logo in 'other'. Some of the most common 'other' platforms include accommodation establishments and on various websites. There has also been an increase in the noting of the logo on clothing and merchandise and this is possibly due to staff members wearing branded clothing at tourist attractions around the province.

Event Improvement Suggestions



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

- 1) Shuttle services to start and finish
- 2) Better banking facilities
- 3) Improve walkways for the elderly and disabled
- 4) Improve toilets
- 5) More shade
- 6) Allow more space for parking
- 7) Clamp down on smoking in public
- 8) Improved safety

Findings



- 1) The Midmar Mile event largely attracted overnight and day visitors from well outside of the local area. A small proportion (10%) of the respondents were characterized as locals coming from within the Pietermaritzburg/Midlands area. The event has thus proven its ability to draw people from outside the area in which it takes place.
- 2) Most respondents at the event came from either KwaZulu-Natal (52%) or Gauteng (39%). This research has shown that the majority of visitors to the Midmar Mile come from these two provinces, with the latter showing an increase.
- 3) The majority of overnight visitors stayed in the area for 2 nights which is consistent with the duration of the event. This shows that the respondents only stayed for the duration of the event. This statistic has also seen a consistent increase from 2010-2015. This may be an indication of the pressure of the rise of costs on families, as this event is being treated as a must-attend event, but for a minimum stay.
- 4) Private vehicles continued to be the most used form of transport to the event (93%). This is the cause of the traffic problems at the resort.
- 5) Previous attendance/participation (67%) and word-of-mouth (26%) continued to be the main factors influencing respondents to attend the Midmar Mile.
- 6) 99% of the respondents were satisfied with information provided regarding the event.

Findings (cont'd)



- 7) The majority of the respondents suggested the event be on TV (10%) and radio (4%). On a positive note, 63% indicated that the event was well advertised.
- 8) Some 97% of the respondents said they would attend the event again. This is positive for future events. This is also a statistically significant increase from 2014.
- 9) 87% of the respondents had attended the event before, which is a statistically significant increase. This shows the ability of the event to maintain consistent participants.
- 10) 99% of the respondents had either an 'excellent' or a 'good' experience.
- 11) The problems that were experienced (by 5% of the respondents) have been declining since it was 20% in 2010 and 12% in 2014. This may be as a result of the organisers improving the event year on year.
- 12) 100% of the respondents would recommend the event to family and friends. This augurs well for the event in future. They indicated they would recommend the event because of the following reasons:
 - Very good swimming event
 - Good for the family and to get outside
 - Fun and well organized
 - Fun/enjoyable

Findings (cont'd)



13) 100% of the respondents also said they would recommend KZN as a tourist destination for the following reasons:

- Variety of things to see and do
- Beaches and surfing
- Good weather/climate
- “A gem of an area”
- Friendly people

14) About 61% of the respondents had noted the Zulu Kingdom logo. This was an improvement from 59% in 2013. This illustrates that the logo is becoming more widely recognized. However, it is still not up the level of recognition that it had achieved in 2011 (89%)

15) A large proportion of respondents still associated ‘ Zulu Kingdom – Exceptional’ with Zulu history/culture/Zulu King as opposed to a holiday destination. A cause of concern is that the association of the slogan with ‘tourism’ or ‘holidays’ is declining.

Recommendations



Recommendations for the **organizers**:

- 1) It is recommended that the organizers look into supplying better or more banking facilities in order for people to withdraw cash for the stores on site
- 2) There is a need for improving the walkways for the elderly and disabled people or to make provisions for these in terms of the layout of the event.
- 3) It was mentioned that there was a need to improve the general ablution facilities, especially in the VIP section.
- 4) Communication regarding the entry fees into the resort and the limited parking space needs to be improved. This would alleviate some frustration and create a better understanding of the limitations placed on the organisers of the event in this regard.
- 5) More shuttles to the start need to be provided. This would alleviate traffic en route to the start.

Recommendations



Recommendations for the **TKZN**:

- 1) Awareness campaigns that promote the TKZN slogan and logo via:
 - Tradeshows
 - Advertising
 - Social media

- 2) Create a link between the slogan/logo and holidays/leisure in KZN.

- 3) Assist the event organizers to promote other activities and attractions in the area