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# SANI 2 C: Topline Summary Report



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# Methodology



- Face to face survey with a probability sample of 244 respondents
- Respondents systematically selected by hour during three days of the event, on Thursday 16<sup>th</sup>, Friday 17<sup>th</sup> and Saturday 18<sup>th</sup> of May 2013.



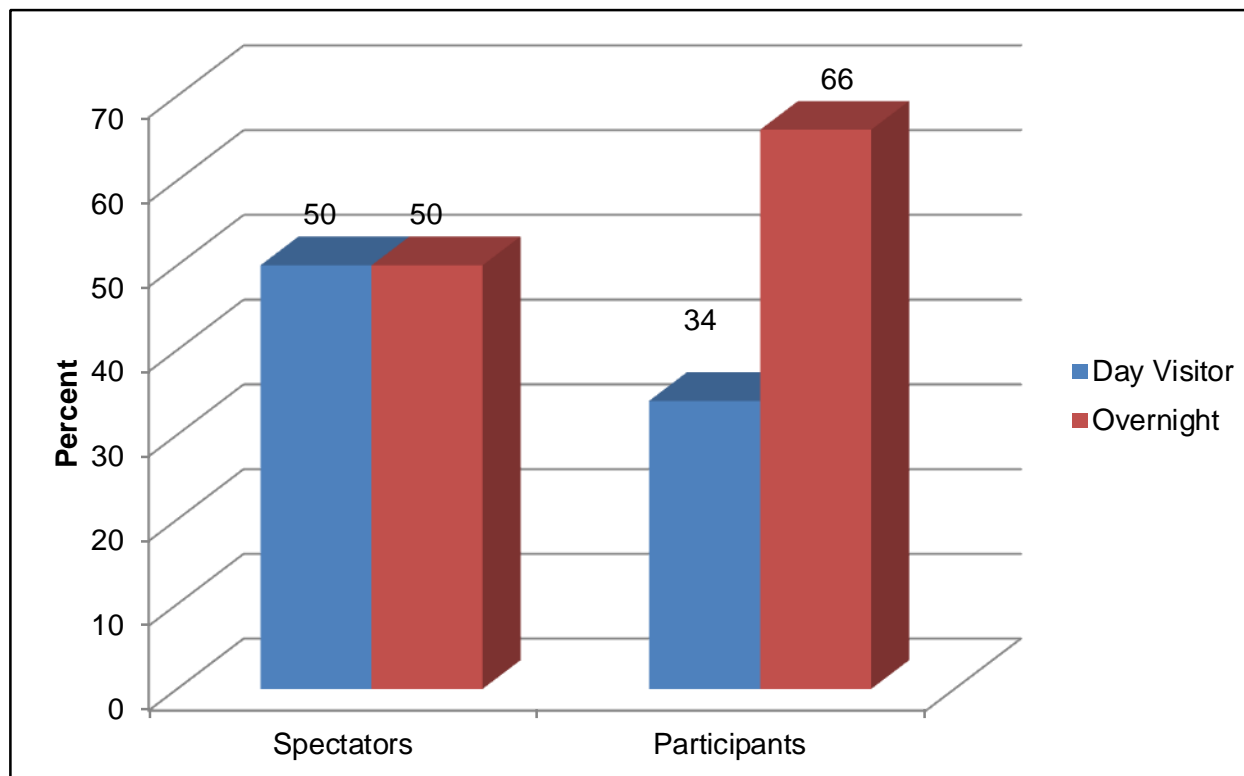
# Positive Highlights



- Approximately 59% of the respondents stayed overnight.
- 43% and 18% of the respondents were from Gauteng and the W. Cape respectively.
- The total tourism spend is estimated to be between R36.1mn and R51.2mn
- 80% of the respondents indicated that they would attend the event again.
- 97% of the respondents had a good or excellent experience at the event.
- 94% of the respondents did not experience any problems at the event.
- 74% of the respondents indicated that they would return to KwaZulu-Natal for a holiday in the next 12 months.
- 98% would recommend the event to friends and family.



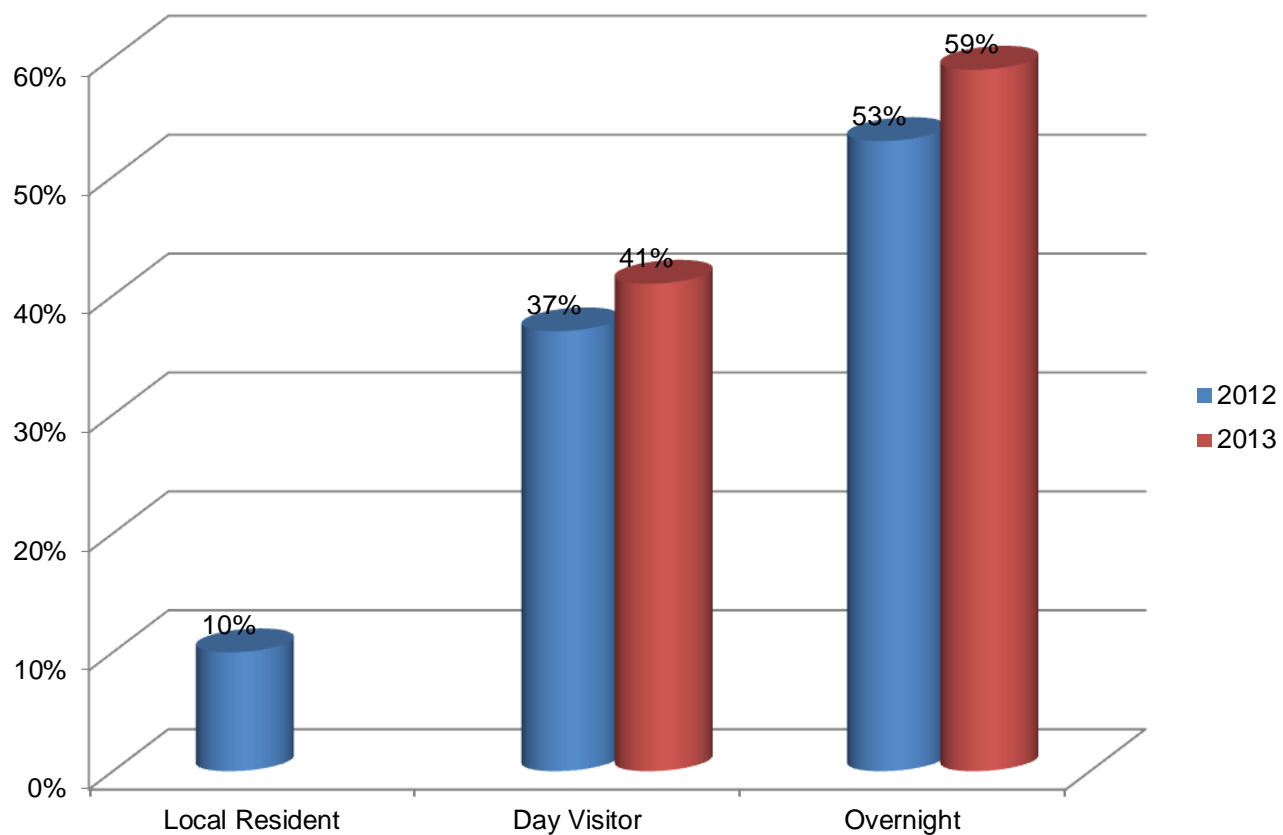
# Nature of Sani 2C Respondents



About 50% of the spectators were overnight visitors to the South Coast and 66% of the participants stayed overnight on the South Coast.



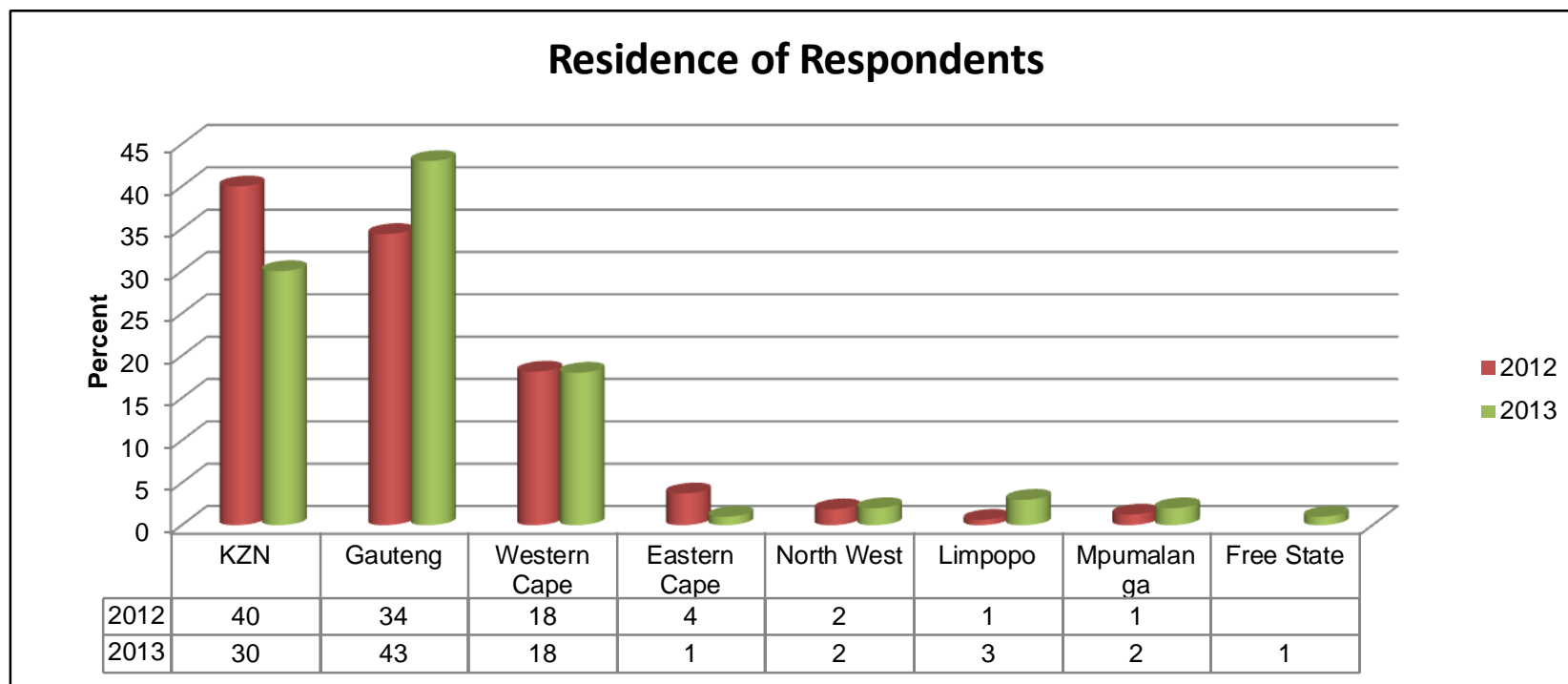
# Nature of Sani 2C Respondents



Almost 60% of the respondents were overnight visitors to the South Coast. There was no statistically significant increase in the number of respondents who stayed overnight



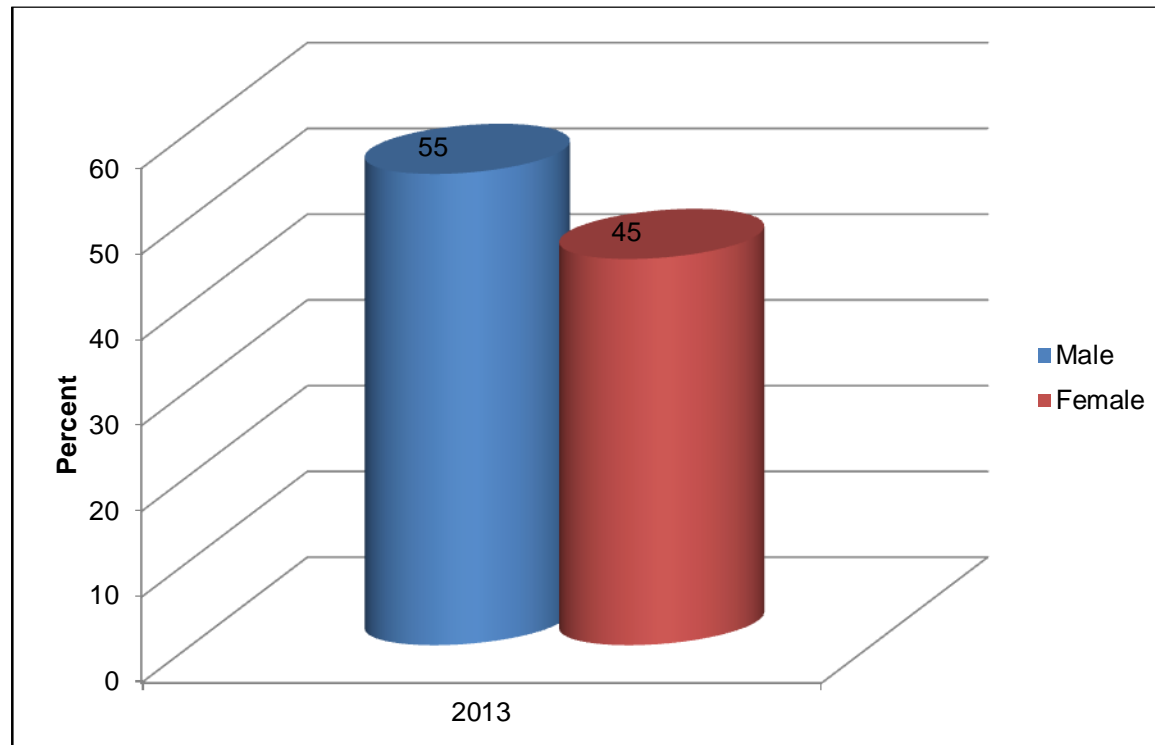
# Nature of Sani 2C Respondents



Most of the respondents were from KZN or Gauteng. However a statistical test did not show and significant decrease in the number of respondents from KZN.



# Gender of Respondents



Most of the respondents were male. As 55% of the respondents were male and most of them were participants were male, it can be assumed that most of the spectators were female.



# Age of Respondents



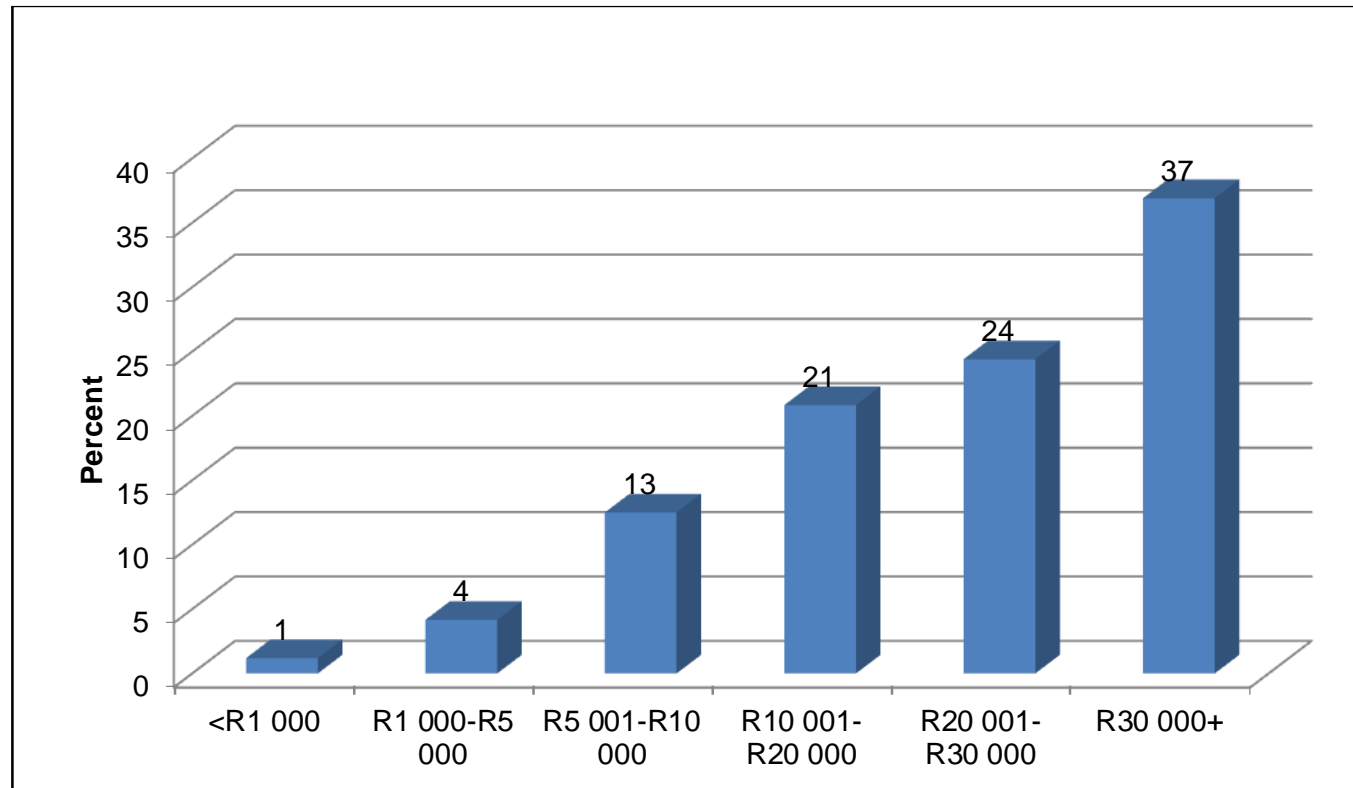
Age Category	Count	Percent
<20	1	0
21-30	34	14
31-40	65	27
41-50	67	27
51-60	32	13
61-70	45	18

The age group of the respondents reflects that most of the respondents were between the ages of 31 and 50 years. Due to the cost ( $\pm$ R5 000) of entering the event, older people who have been working for a longer period, and thus earning a higher income, would more easily be able to afford to enter the event. Therefore the high number of respondents over 30 years of age is an expected finding.





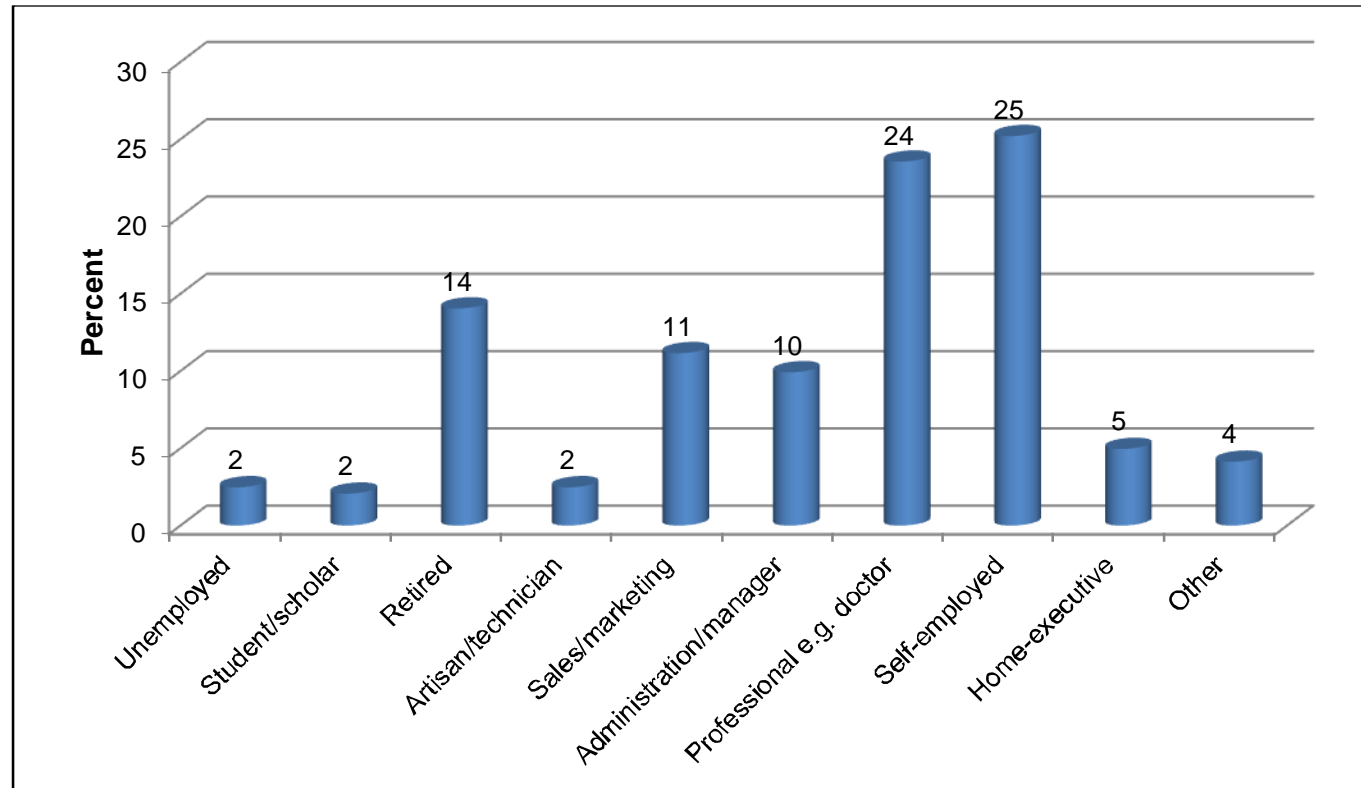
# Income of Respondents



Most of the respondents had an income of over R30 000 per month. The sport of mountain biking is fairly expensive when one considers the cost of a mountain bike and accessories. This creates an opportunity for TKZN to establish a brand presence and recognition in the segment of the market.



# Occupation of Respondents



In line with slide 7, which indicated the income of the respondents, the above slide indicates that most respondents are either professionals or self employed.



# Nature of the Sani2C Spectators and Participants



## Province of Residence

	<b>KZN</b>	<b>Gauteng</b>	<b>W Cape</b>	<b>Free State</b>	<b>E Cape</b>	<b>Mpuma- langa</b>	<b>Limpopo</b>	<b>North West</b>
<b>2012</b>	40%	34%	18%	-	4%	1%	1%	2%
<b>2013</b>	30%	43%	18%	1%	1%	2%	3%	2%

There was a strong presence of Gauteng and Western Cape visitors at the event. Considering that most of the respondents were visitors to the region, it can also be assumed that most of the KZN portion were also visitors. This event is a draw card for visitors to the province. The increase of Gauteng visitors could be attributed to the change on finish venue from the local high school to the beach.



# Estimated Mean Spend per Category



	2012	2013
Accommodation	R1 721	R2 154
Transport	R1 096	R1 430
Food and Beverage	R672	R1 023
Entertainment	R1 695	R582
Souvenirs	R1 524	R918
Total mean spend	R2 988	R4 048

The average spend in most of the above categories has increased when compared to 2012. This may be as a result of more visitors from Gauteng, who had far to travel, as well as to general cost increases, as indicated in the previous slide. Entertainment and souvenir spending declined from 2012. This may be as a result of the increase cost of accommodation transport and food,



# Estimated Average Spend



	2012		2013	
	N	Mean	N	Mean
Spectators	2 000*	R2 130	4 000*	R2 630
Participants	4 000	R3 792	4 500	R4 426

\* Estimated, at finish

An estimated 4 500 riders participated in the three race event. Approximately 4 000 spectators were at the finish in Scottburgh over the three days. The increase in spectators can again be attributed to the change in the location of the finish. There was an increase in the mean spend of spectators and participants. This increase can be linked to the increased mean spend in the previous slide.



# Estimated Economic Impact



		2012	2013
<b>Estimated Direct Impact</b>	At least:	R17 154 139	R24 776 171
	As much as:	R28 351 931	R36 101 763
<b>Estimated Total Impact (multiplier of 1.42)</b>	At least	R24 358 977	R35 182 163
	As much	R40 259 741	R51 264 503
<b>Estimated Total Impact (multiplier of 2.00)</b>	At least	R34 308 278	R49 552 324
	As much	R56 703 862	R72 203 525

The tourism impact of SANI 2 C is between R24mn and R36mn. The total impact was between R35 mn and R51mn using a multiplier of 1.42. When using a multiplier of 2.0, the estimated economic impact is between R49.5mn and R72.2mn



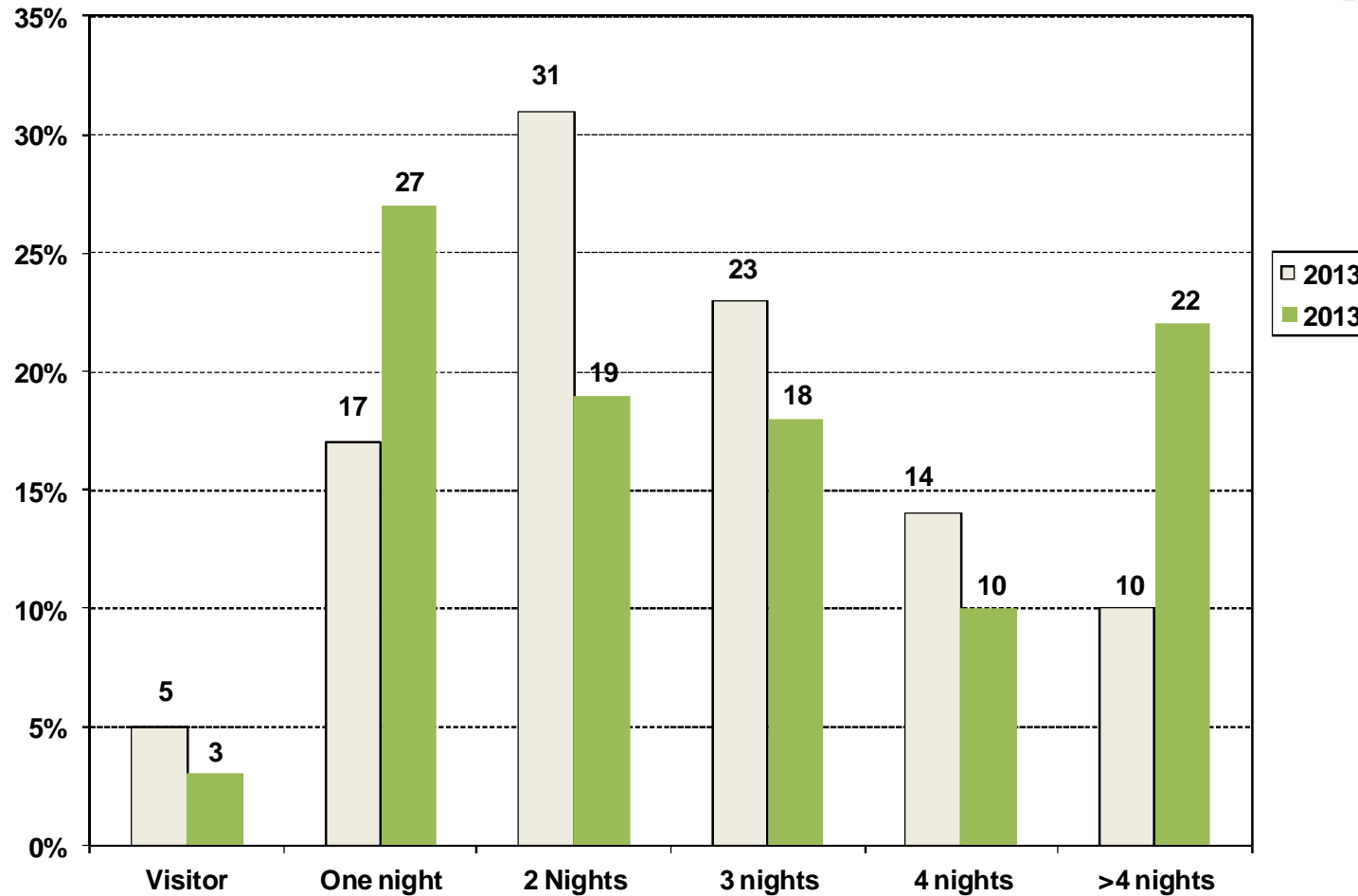
# Social Impact



- The Nedbank Sani2C has assisted a rural school in the Umkomaas Valley with solar powered classrooms to enable the school to access educational material through television and DVD.
- Each year funds are distributed to various beneficiaries. These funds are not merely donated as beneficiaries are encouraged to add value to the event and thus raise funds for themselves. Some of the ways that beneficiaries are involved is through course preparation, bike washing, seconding tables and erecting overnight villages.
- Since 2005 over R15mn has been distributed in this way.



# Length of Stay

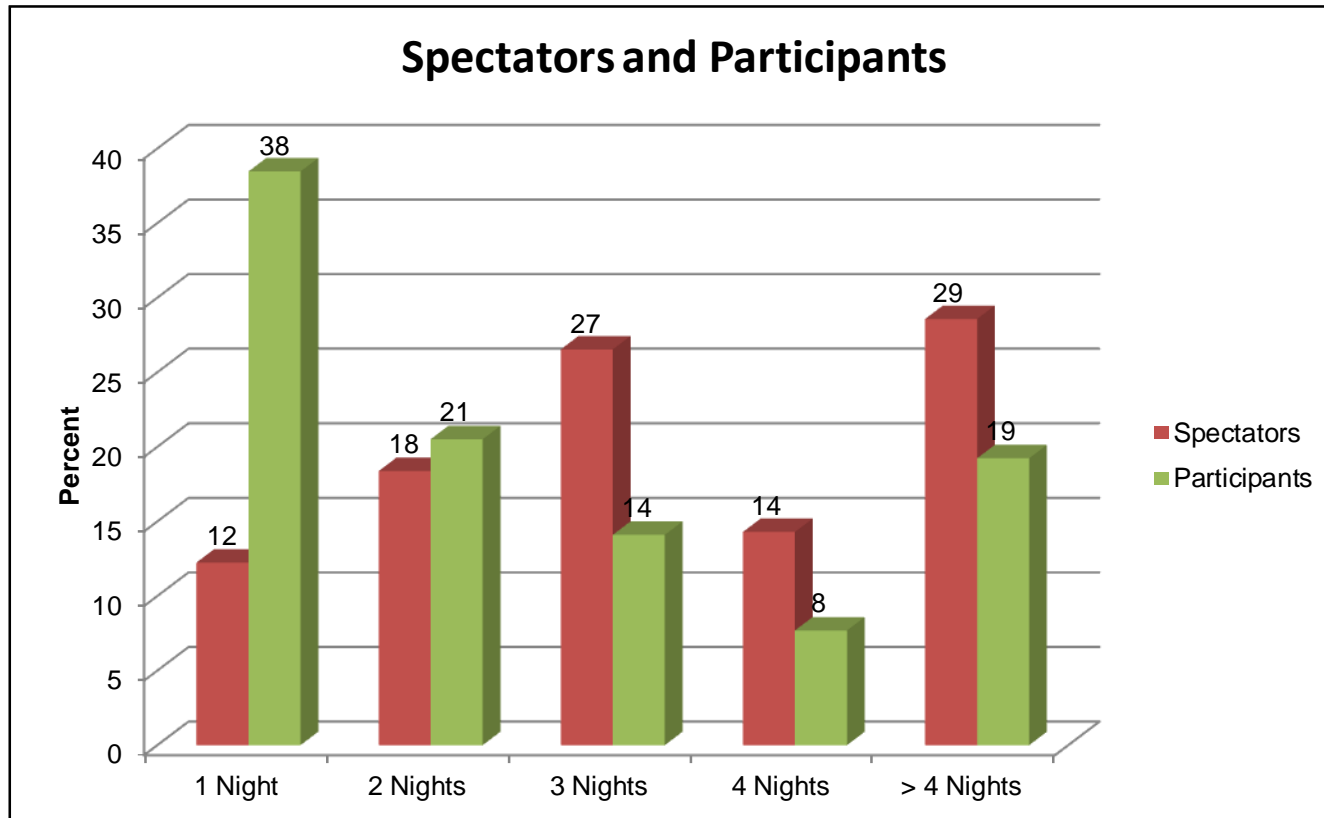


Most respondents stayed 1 or more than 4 nights in the destination. These were shown to have increased, but there was no statistically significant increase when compared to 2012. Participants were provided with accommodation during the event.





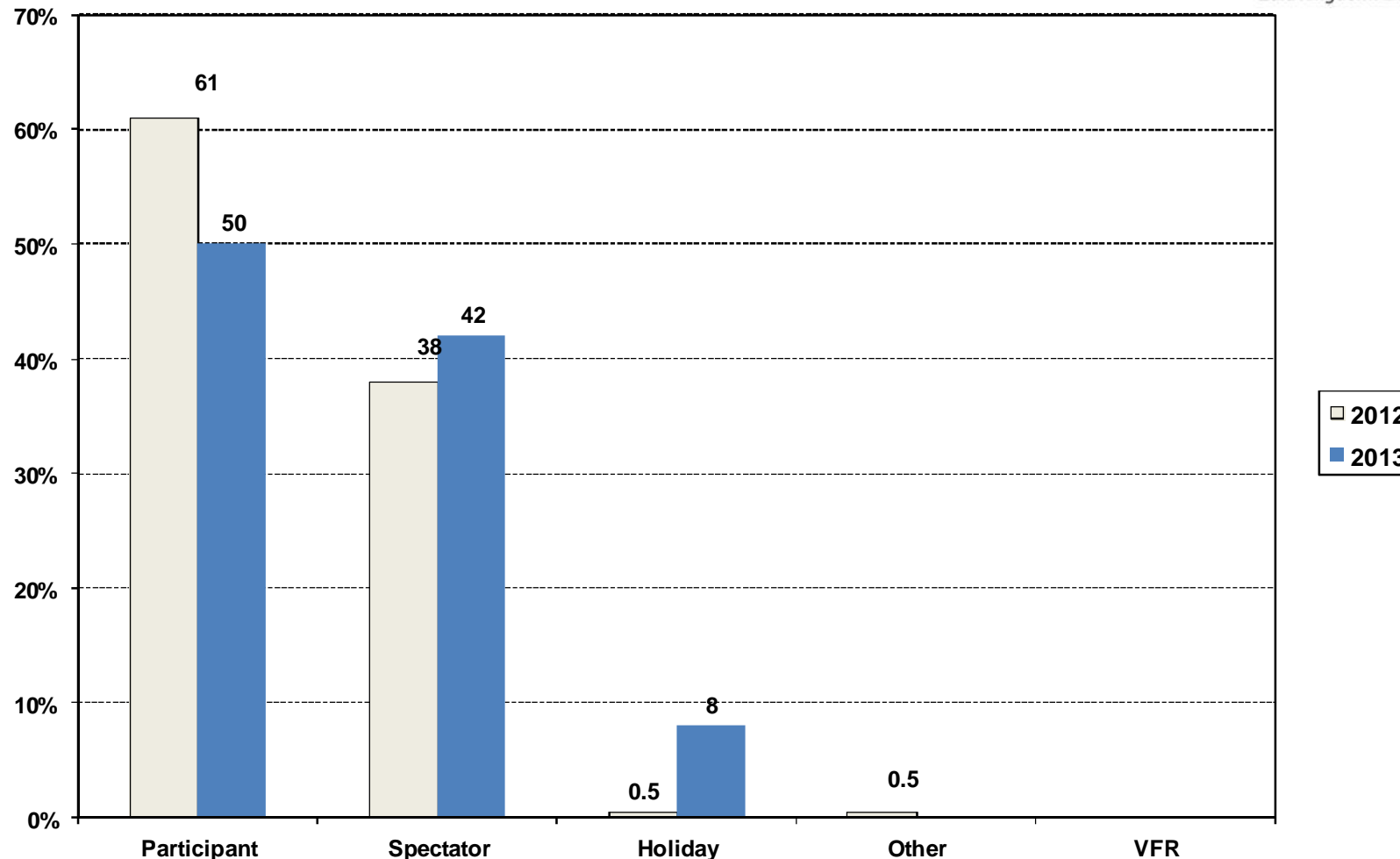
# Length of Stay (cont'd)



It is clear that most of the participants who did stay over night stayed for only 1 night on the South Coast. It was the spectators who stayed for 3,4 and more than 4 nights. This was probably because some were there on holiday.



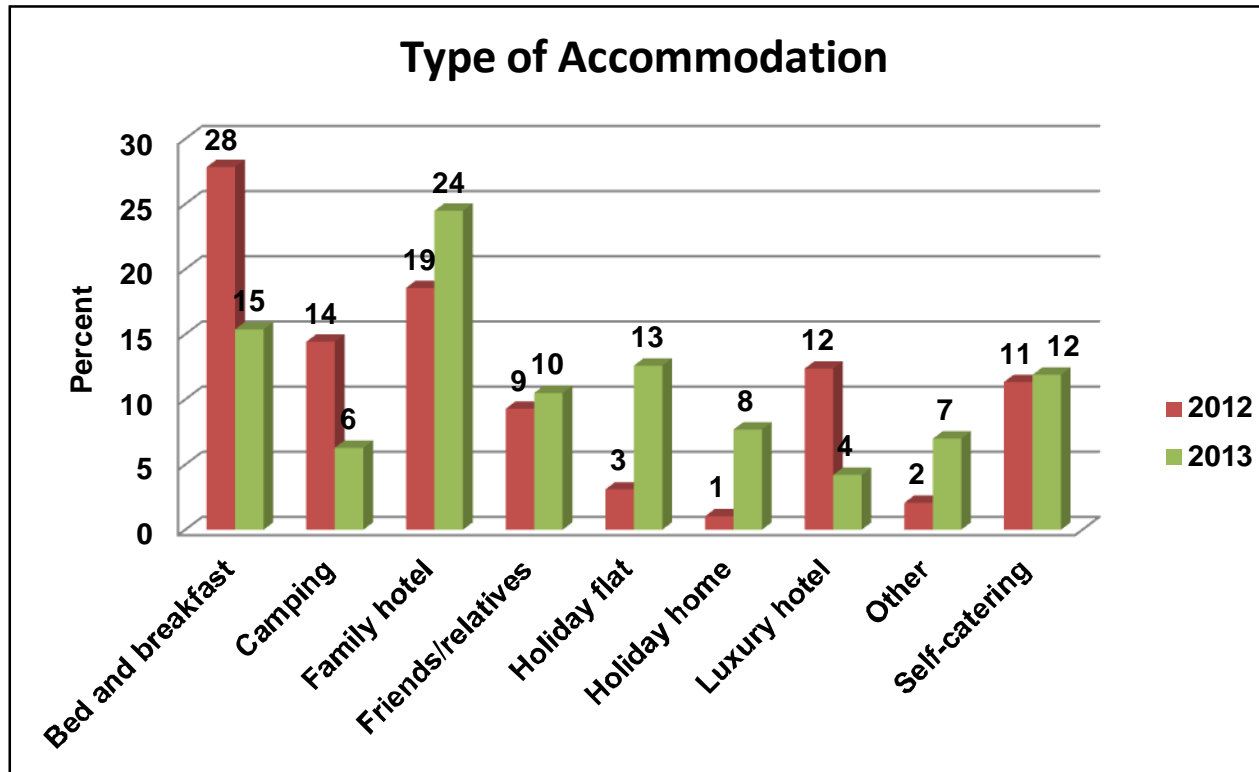
# Primary reason for visiting area where event is taking place



The primary reasons for being at the event were that the respondents were participants (50%) or spectators (42%). 92% of the respondents were in the destination because of the event. The higher number of spectators at the 2012 event, can be attributed to the venue of the finish, which was at the beach, a public space, where people not intending to watch the event could do both.



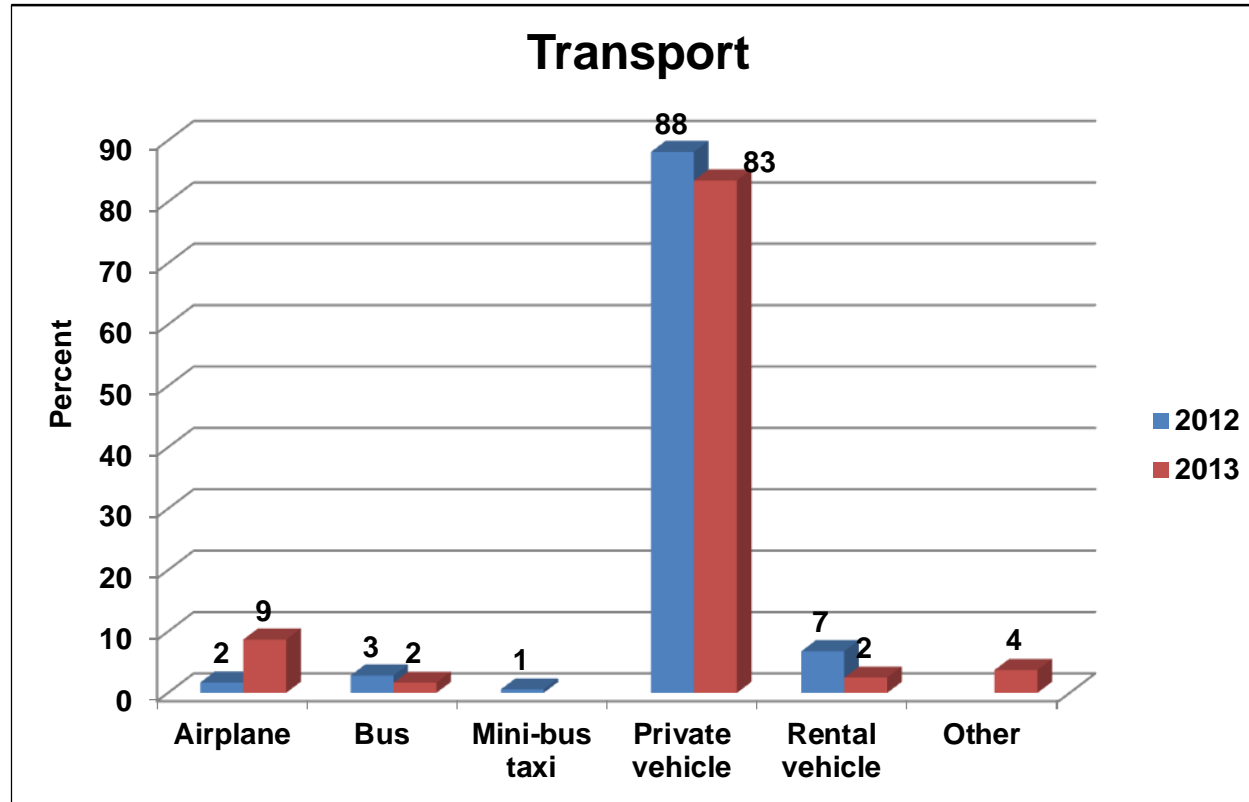
# Accommodation



Most participants stayed in B&Bs, family hotels and with friends and relatives, either before or after the race. There was a decline in the number of respondents who stayed in B&B's and who camped and an increase of those who stayed in holiday flats, family hotels and holiday homes. This is supported by the increase in accommodation spending.



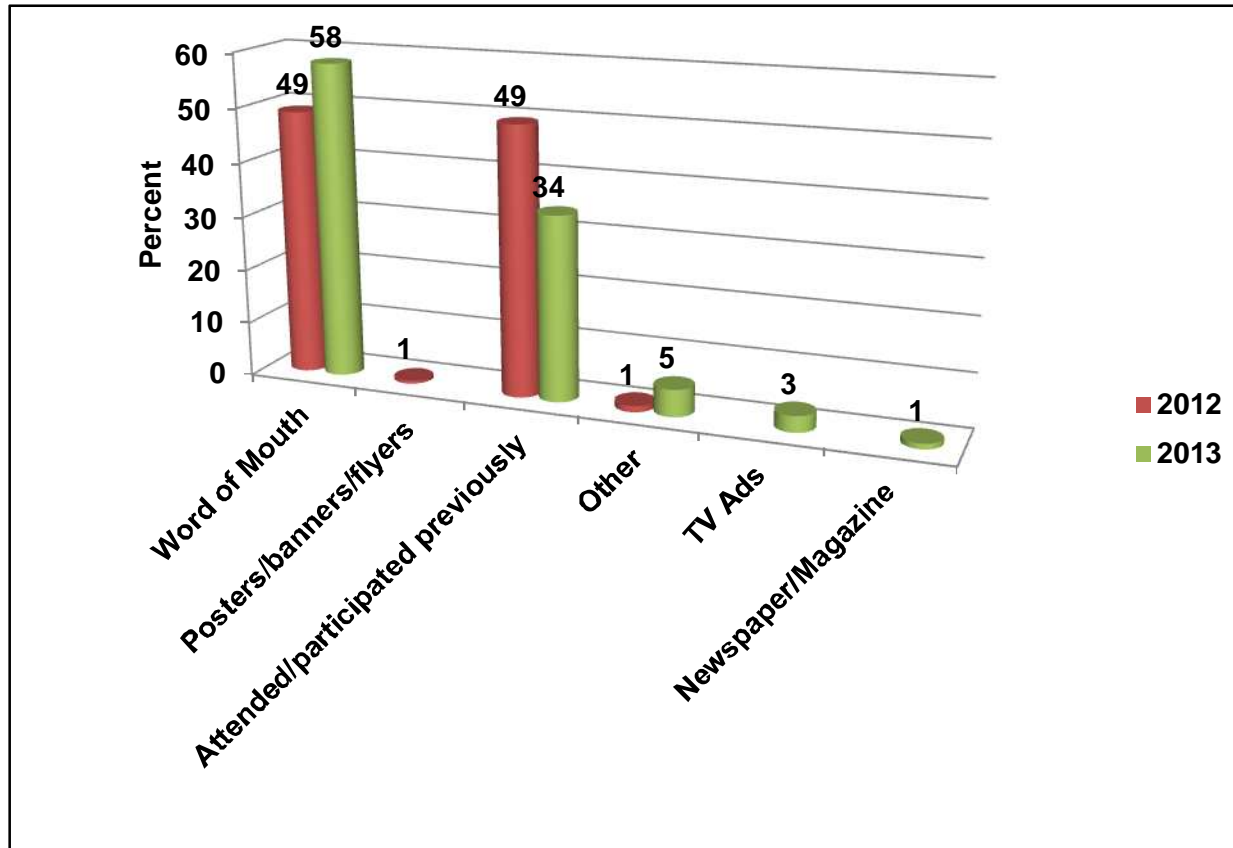
# Transport to Event: non-residents



Most of the respondents used private vehicles to travel to the destination. There was an increase in the use of the airplane as a mode of transport in getting to Durban. This is linked to the increases in respondents from Gauteng and the Western Cape,



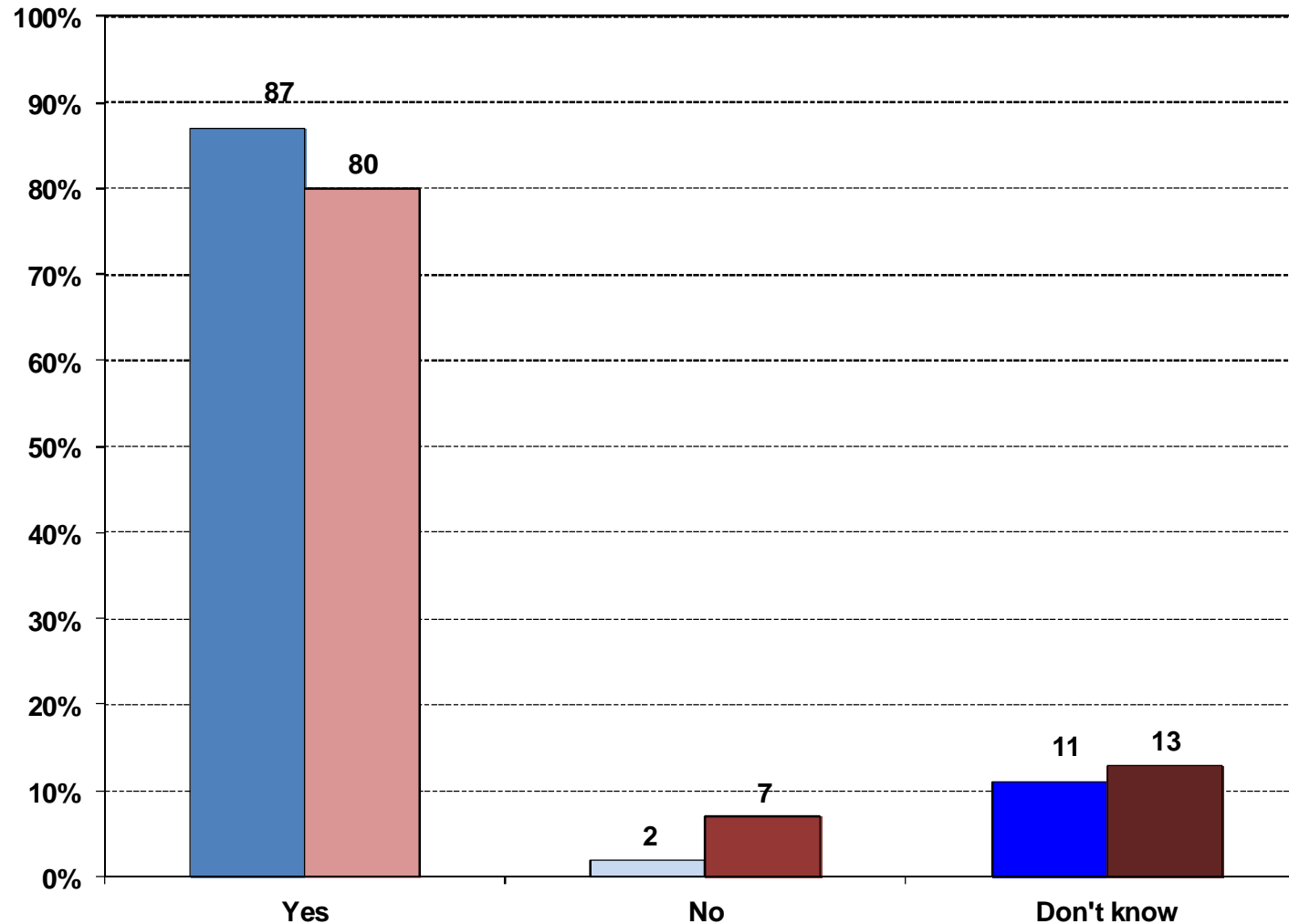
# Influenced to attend?



‘Word-of-mouth’ and ‘attend/participated previously’ were the most significant factors influencing people to attend the event. This indicates that the event is popular and the experience at the event can impact on popularity of the event.



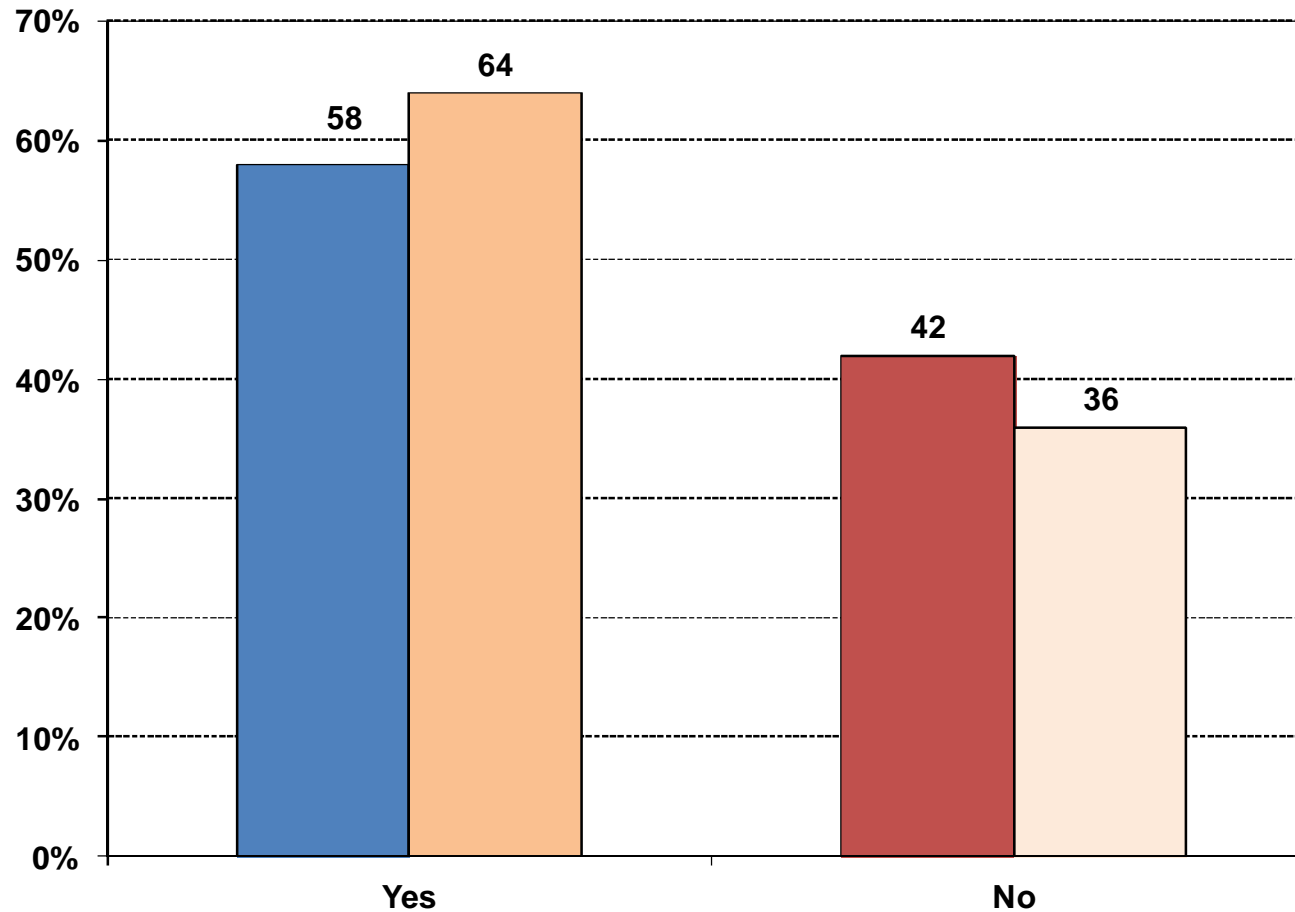
# Attend again?



80% of the respondents indicated that they would attend the event again. 13% were not sure. This may have been due to the process of entering the event which is done on an application basis. Therefore a participant was not guaranteed a place in the event. Furthermore there were more spectators at the event in 2013 than in 2012, who were not sure of being available next year.



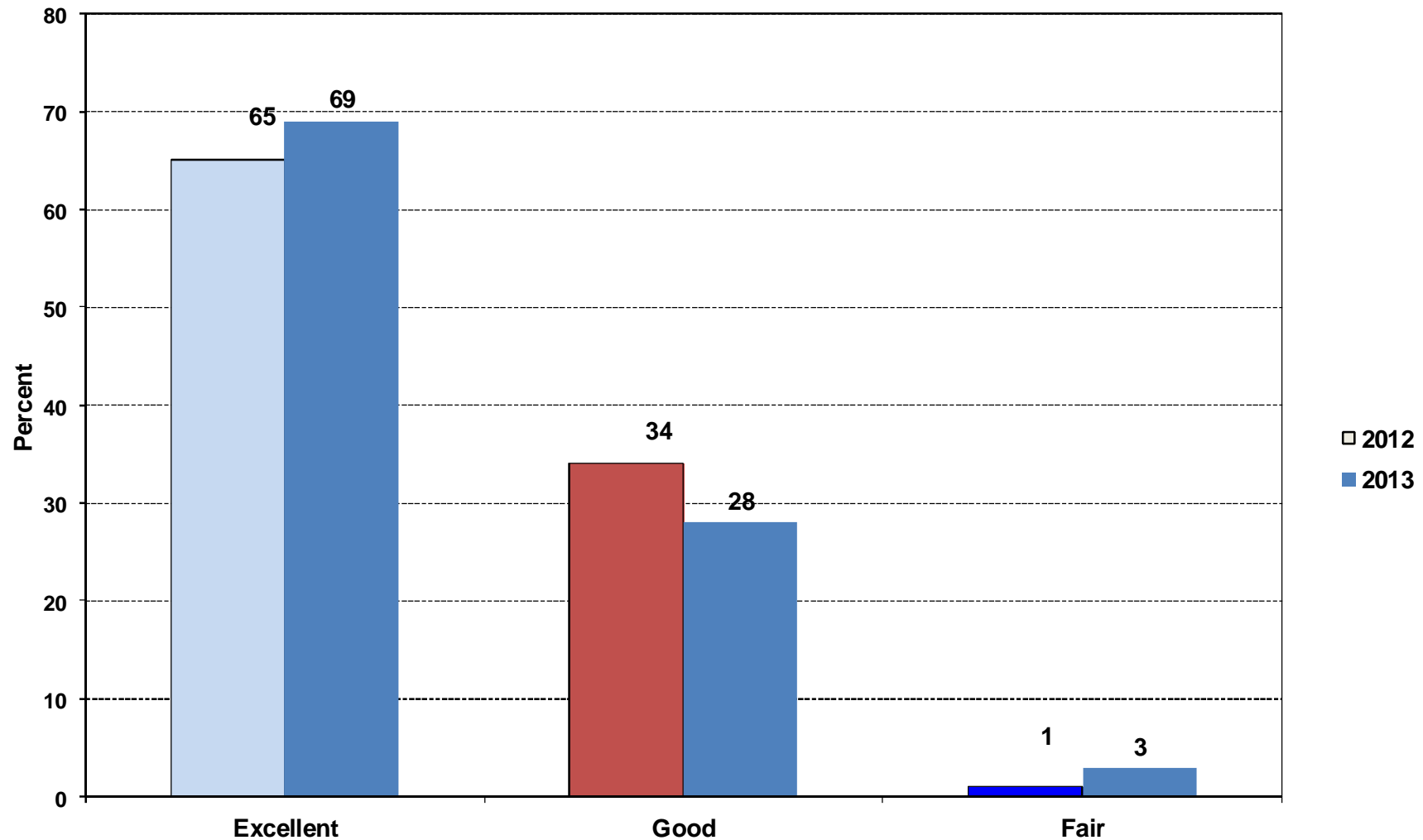
# Attend in previous years?



Over 60% if the respondents had attended the San2C previously. This bodes well for the event as it is seen to attract new supporters and participants. The event has shown that it can draw people back as it shows an improved repeater rate.



# Experience?

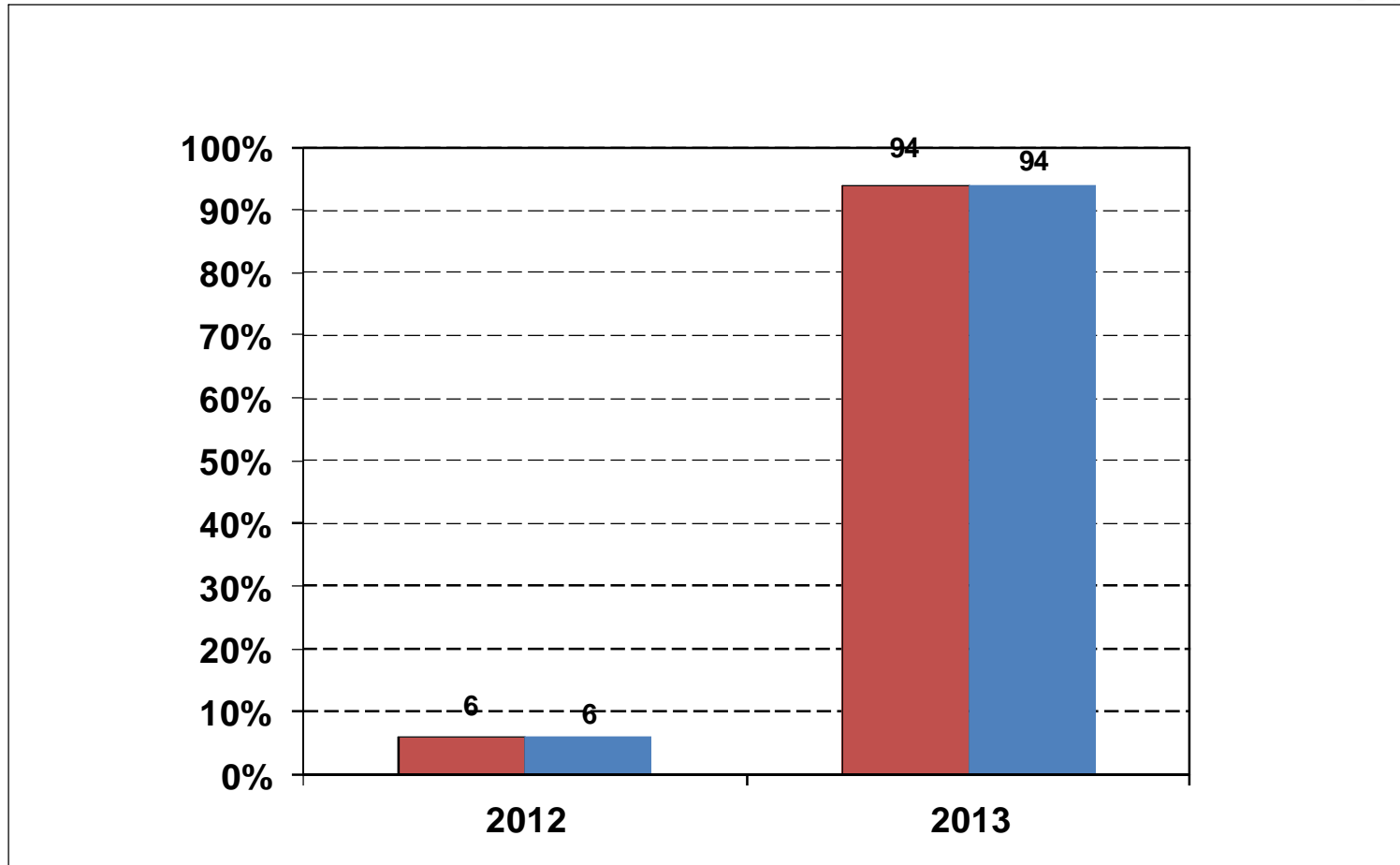


Almost all (97%) the respondents had an 'excellent' or 'good' experience. This shows that the respondents were happy with the organization of the event and would return. Because word-of-mouth is a major way of spreading information, the experience people have at an event contributes to a positive image of the event and destination.





# Experienced problems?



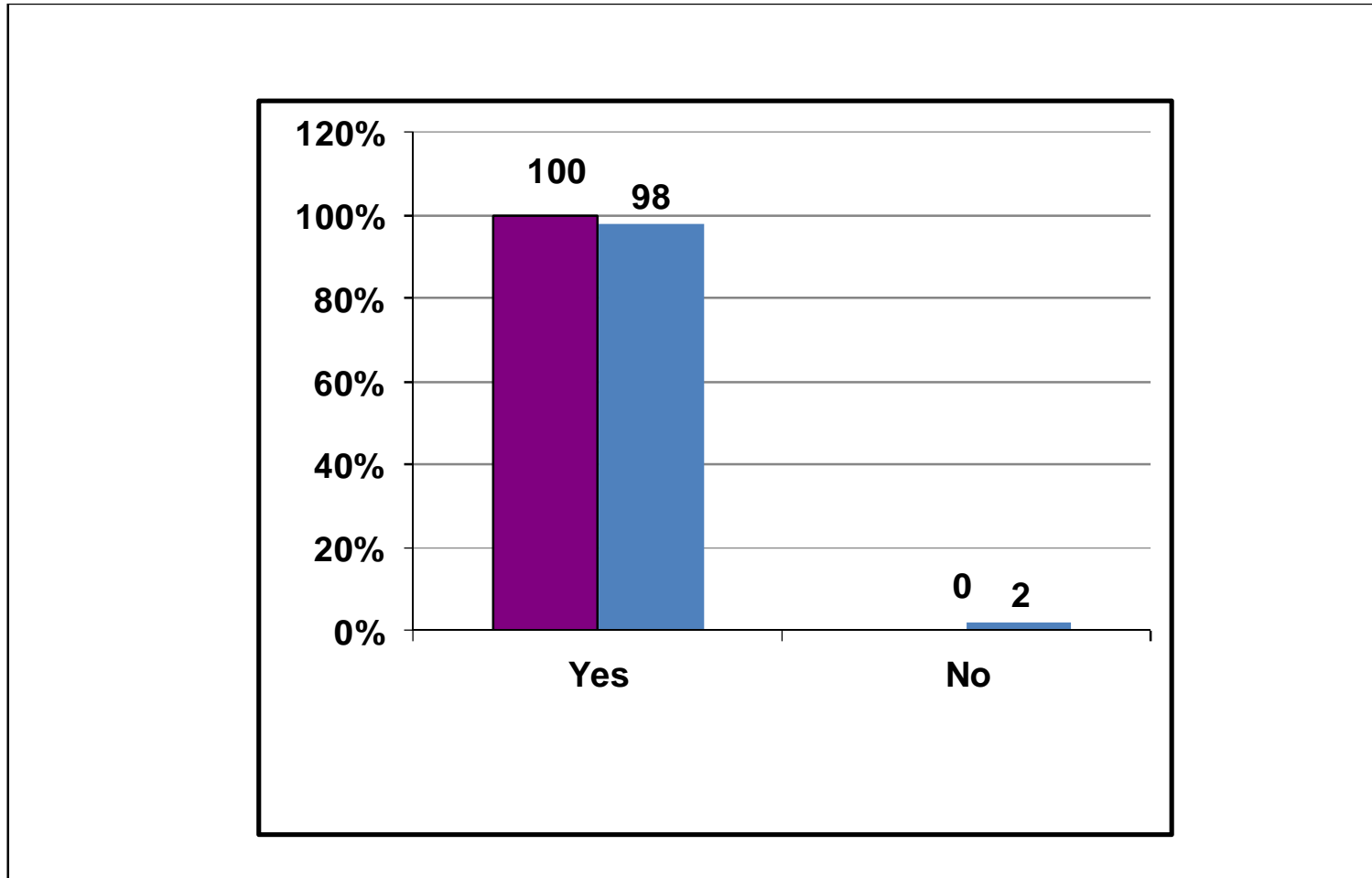
Most of the respondents (94%) experienced not problems at the event.

**Problems that were experienced were related to the following:**

- Cold and poor shower facilities at the finish
- More entertainment
- Not enough parking space at finish



# Recommendation of the event to family and friends



The event is considered a worthwhile event to recommend to family and friends. The high number of respondents (97%) having an 'excellent' or 'good' experience at the event has an impact on their willingness to recommend the event.



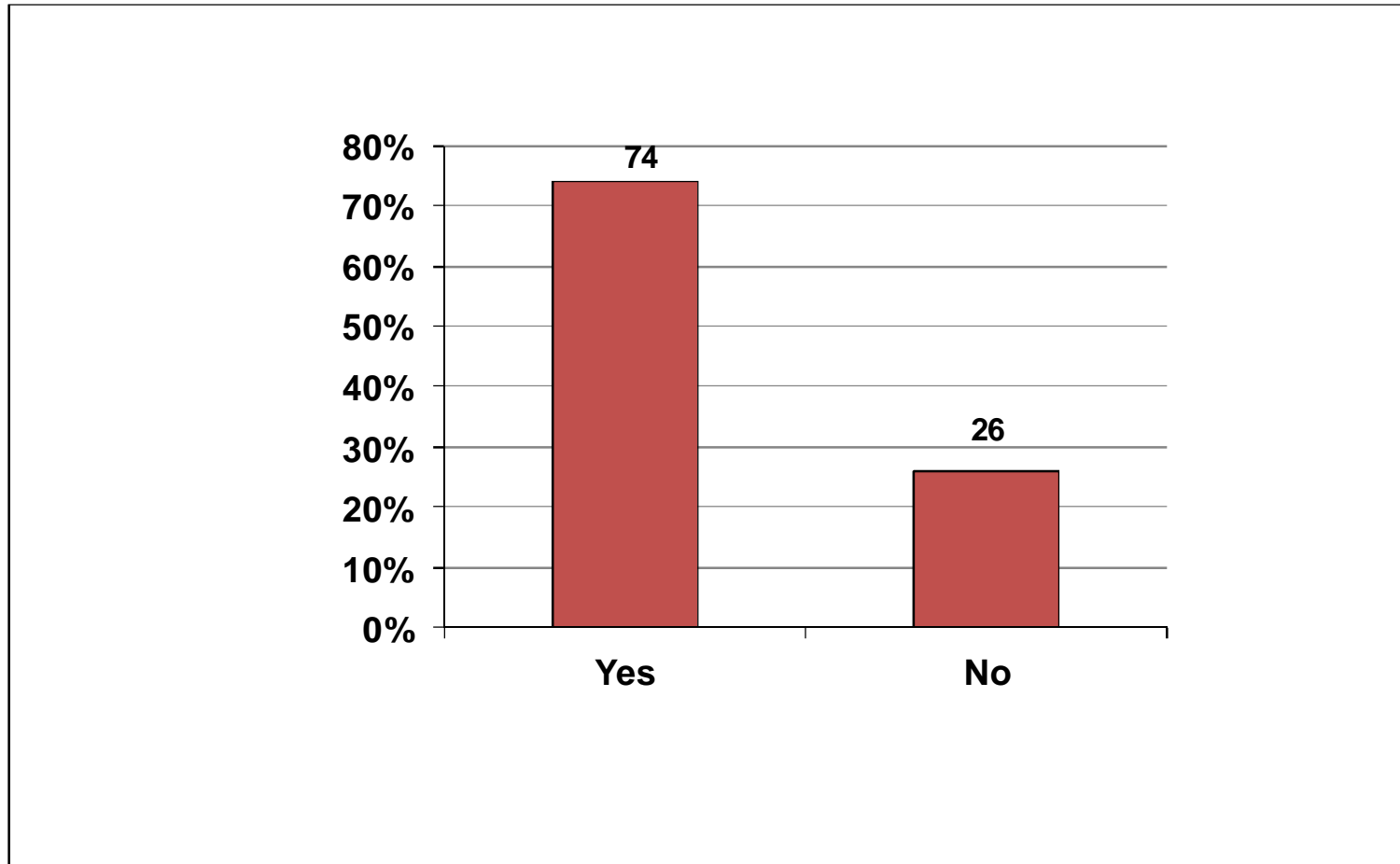
# Reasons: Recommendation



- The positive responses were related to the event having the following characteristics:
  - Amazing experience
  - Challenging
  - Best race in the country
  - Well organized
  - Awesome, fantastic event
  - Fun, good family event
  - Giving to communities



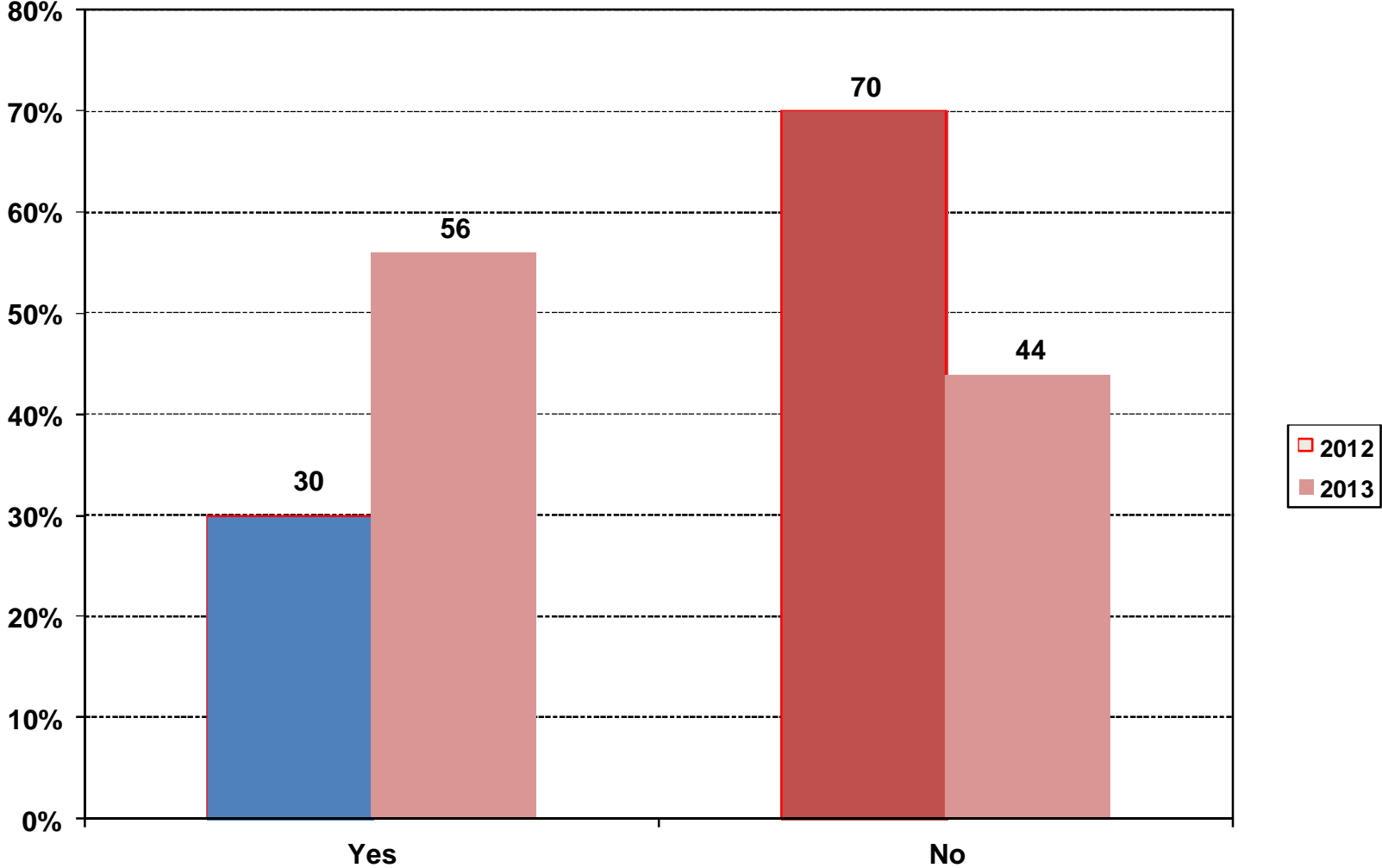
# Plan to visit KZN for a holiday in the next 12 months



Almost three quarters of the respondents were willing to visit KwaZulu-Natal for a holiday within the next twelve months. Their positive experience of the event and in the destination impacts on their willingness to return to the province for a holiday.



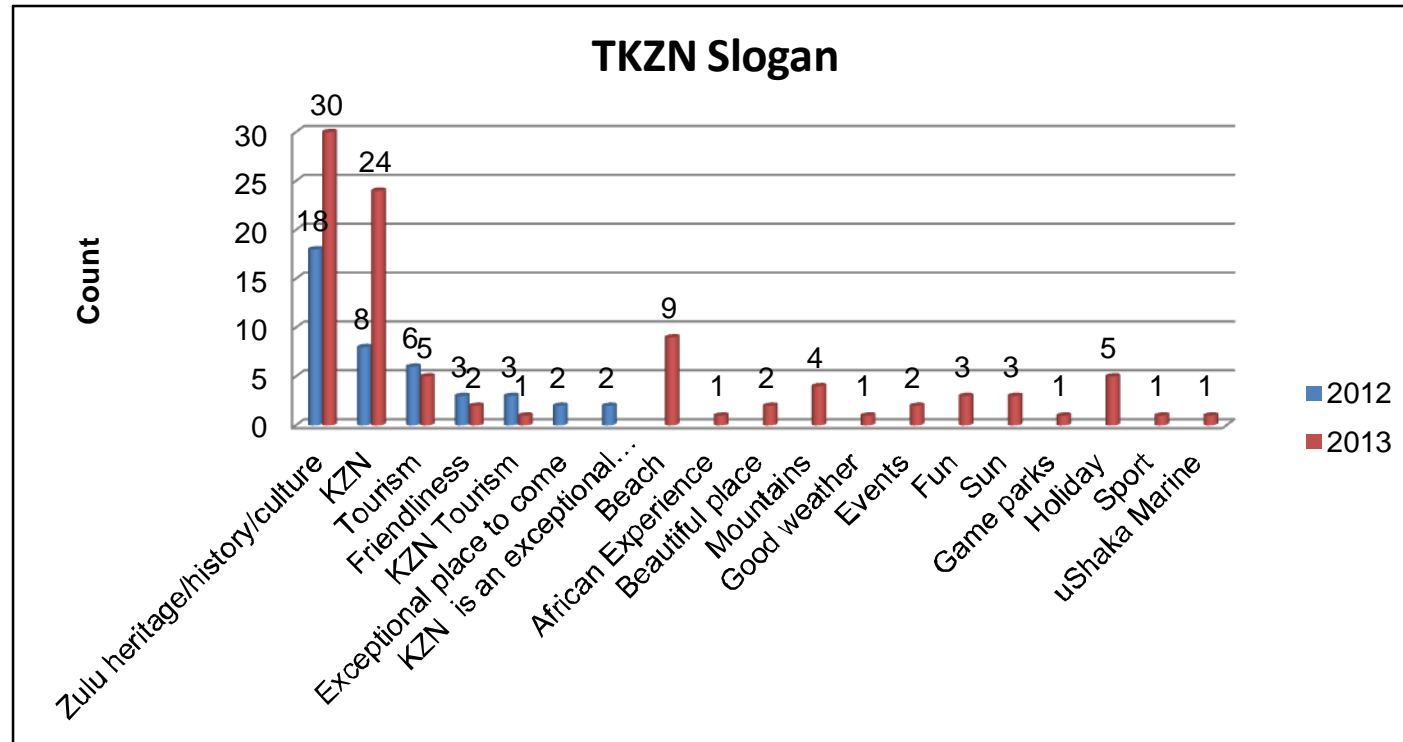
# Familiar with TKZN slogan?



56% of the respondents were familiar with the slogan of TKZN. This was a vast improvement over 2012. This can be attributed to the increased branding efforts of TKZN.



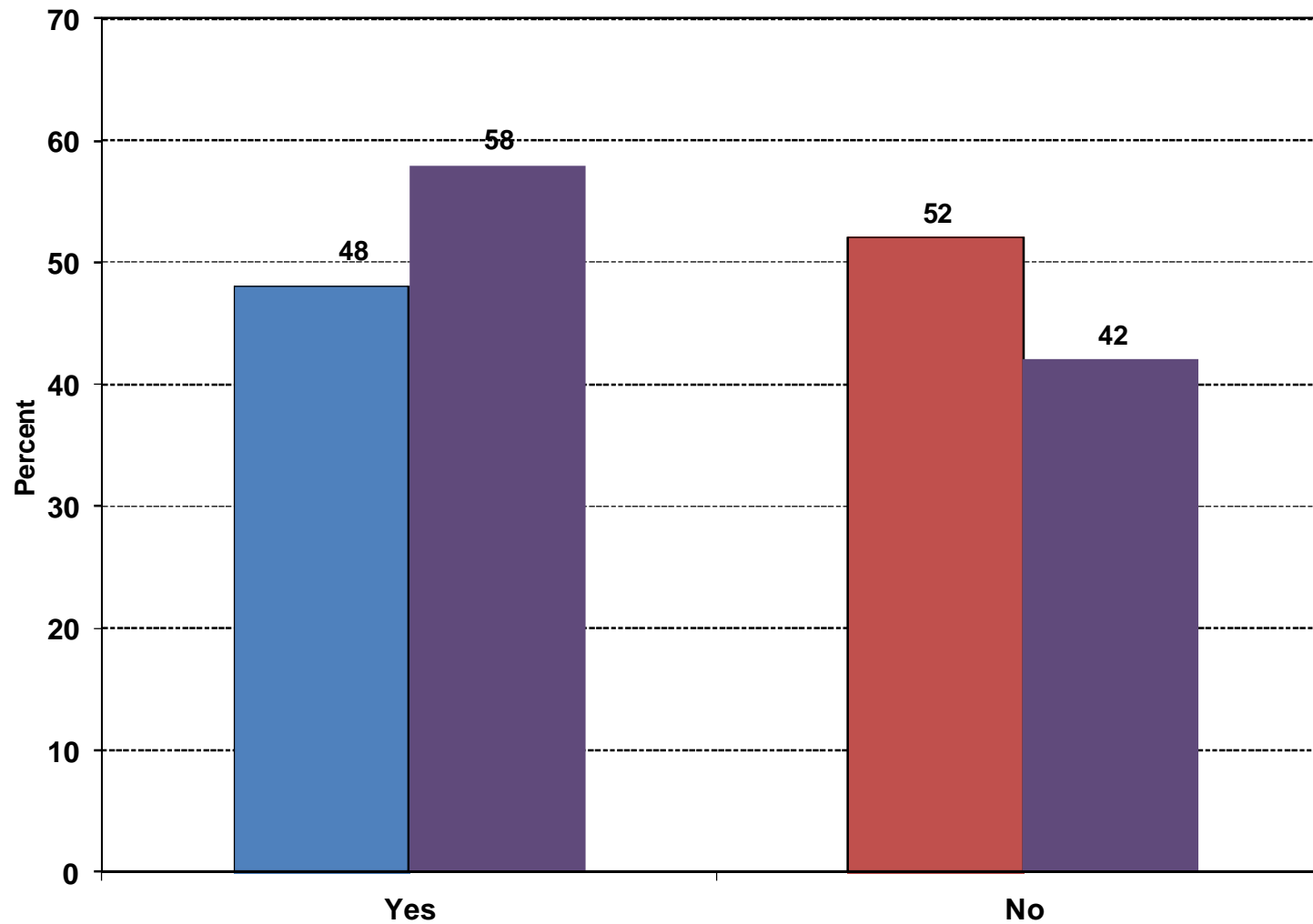
# Associations – TKZN slogan: Core Mentions



In relation to the increased recognition of the slogan, it is also clear that there has been more association made with the slogan with regards to KZN, the beach and holidays. However, the association with Zulu culture and heritage is still very strong.



# Noted TKZN logo?



About 58% of the respondents noted the TKZN logo. This was due to the introduction of a new logo in 2011. The recognition of the logo has improved since 2012. This may be as a result of the increased exposure of the brand in various advertisements at events and trade shows.



# Where TKZN logo noted?

	2012	2013
Airport	14	17
Tourism information centre/junction	9	2
Internet	8	6
Brochures/pamphlets	7	2
Along the road	6	1
Can't recall	6	-
Billboards/adverts/posters/banners	6	17
Magazine/Newspapers	4	12
Tourism Indaba	3	6
Durban	3	3
Media	3	1
TV	3	23
Durban beachfront events	2	-
FIFA Soccer World Cup	2	-
Travel agencies	1	-
All over	1	1
Nature reserve	1	-
House and Home Expo	1	-
At uShaka Marine World	1	2
Clothing	1	5
Tourism industry meetings	1	-
In a mall (midlands )	1	-
In KZN	1	-
KZN promotional materials	1	-
At this event	-	4
Tollgate	-	1
Ballito	-	2
Comrades	-	2
Dusi	-	1
Email	-	1
Moses Mabhida Stadium	-	1
Shops	-	3
Sodwana Bay	-	1
Sports events	-	1
Facebook	-	1



The new logo has been recognised in more places than in 2012. This be as a result of increased branding at events and trade shows.





# Suggested Improvements?



Suggestions	Count
More showers	16
Improve parking	12
Introduce more signs	5
The finishing line must go back to the school as in previous years	4
Better toilet facilities	3
More food for supporters	2
More supporter friendly/entertainment	2
Television coverage	2
Just not let it get too big.	2
More activities for kids to do/more beach activities	2

Note: The above table only displays the suggestions that were made more than once



# Conclusion/Main Findings



- Approximately 59% of the respondents stayed overnight. This is a positive finding for the destination, because this would increase tourism spend in the destination. Visitors increase the potential economic impact of an event.
- About 30% of the respondents were from KZN, 43% from Gauteng and 18% from the W. Cape. This statistic shows significant numbers of attendees originate from outside the province. This is a positive finding as it shows that the event acts as a draw card for visitors from outside the province, which again results in a greater economic impact for the destination.
- The mean spend of all respondents was R4 048, with participants spending on average R4 426, and spectators R2 630. This may be due to the costs paid to participate in the race as the cost of registration was about R4 500 per team of 2 people.
- The estimated direct tourism spend was between R24mn and R36mn and the total spend (using a multiplier of 1.42) was between R35.1mn and R51.2mn and R49.5mn and R72.2mn using a multiplier of 2.
- Most respondents (27%) stayed for a period of 1 night, while 22% stayed for more than 4 nights. This was in the area where the race ended.
- The primary reason for attending the event was because the respondents were participants (50%) or spectators (42%).
- A private vehicle (83%) was the most popular form of transport used. This is due to the nature of the event, because of the need for supporters of participants to travel from the start to the finish and to carry bicycles and other equipment.



# Conclusion/Main Findings



- Respondents were strongly influenced to attend by 'word-of-mouth' and 'previous attendance'.
- About 80% of the respondents indicated that they would attend the event again. This is significant as this event is fairly new (2005) and growing due to demand. In 2005, there were 300 teams, which grew to 600 teams in 2007. There were 650 teams in 2011. In 2013 there were 2 250 teams.
- About 64% of the respondents indicated that they had attended this event previously, while 36% had not attend the event previously. This may be due to the new format of the event which allowed more participants to enter the race. A two-race format was introduced in 2008 and a three-race format in 2012 to accommodate more riders. The start was staggered over three days.
- 97% of the respondents had an 'excellent' or 'good' experience. This indicated that the event is well organised and thus augurs well for the future of the event as it is viewed in a very positive light.
- Approximately 94% of the respondents did not experience any problems. Some of the problems experienced were:
  - Cold showers at the finish
  - Not enough parking space at the finish
  - More entertainment at the finish



# Conclusion/Main Findings



- About 98% of the respondents would recommend this event to their family and friends. Some of the reasons for this were:
  - Amazing experience
  - Challenging
  - Well organized
  - Giving to communities
- About 74% of the respondents planned return to KZN for a holiday in the next 12 months.
- Approximately 56% of the respondents indicated that they were familiar with the TKZN slogan and 58% indicated that they had noted the TKZN logo.



# Recommendations



From respondents:

- Parking was mentioned as a problem. However, it was observed by the researcher that there was sufficient parking, although people would have to walk few hundred meters. Thus it would be prudent for organizers to mention that there is limited parking close to the finish, but more parking was available further away, with sign posts indicating the additional parking areas.
- Shower facilities have also been mentioned as a challenge. It is suggested that the organizers engage the owners of the facilities with a view to improving them.
- Increase the variety of food available at the finish. There were only two supplier of food for spectators at the finish.

For TKZN:

- Increase the number of international entrants, thus increasing the profile of the event to an international event. This can possibly be done through the national cycling body and advertising or marketing SANI 2 C at other international races.
- Probably assist with providing entertainment for the family at the finish.
- Provide branding at the event to create better awareness.
- Provide an information kiosk to the event.

