

A1 GRAND PRIX 2008 Topline Summary Report

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Tourism KwaZulu-Natal
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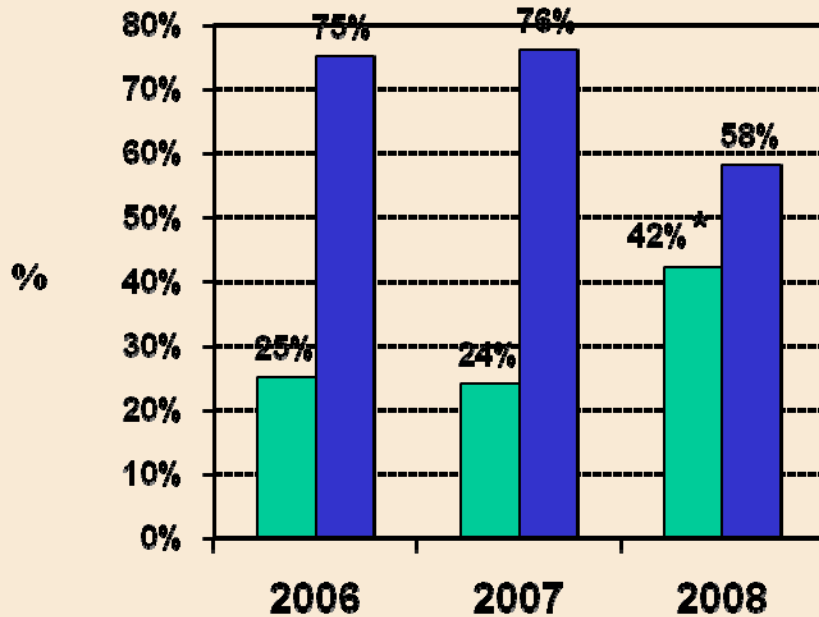


Methodology

- Face to face survey with a probability sample of 232 spectators.
- Respondents were systematically selected by hour during the course of the event.
- Most of the interviews were conducted on the Sunday of the event. This was the main race day.

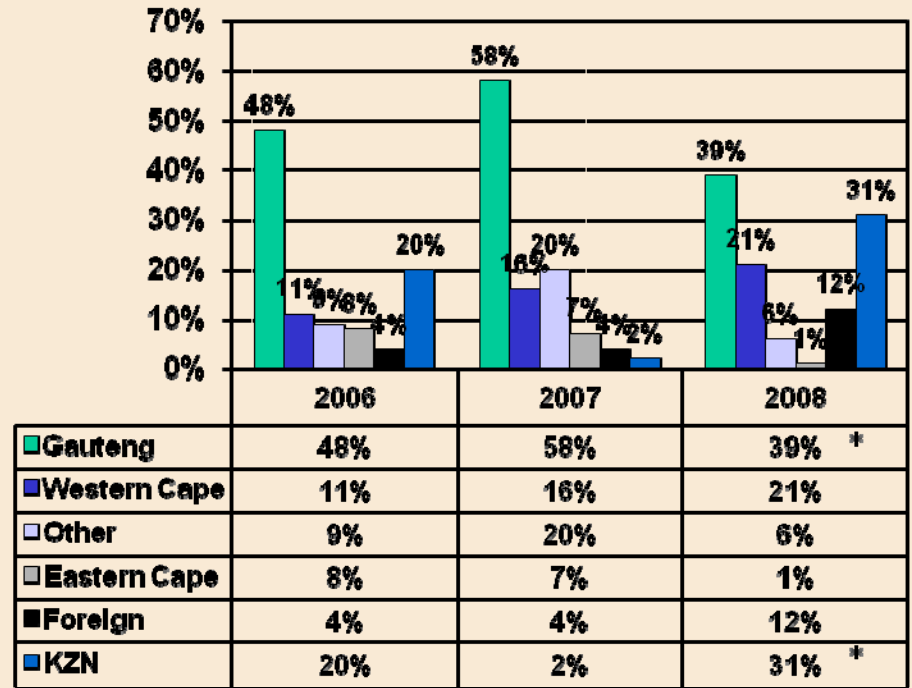
Nature of A1 Grand Prix Spectators

Overnight vs Residents/Day Visitors



■ Overnight
 ■ Day visitors or residents

Place of Residence: Overnight Spectators



* Significant increase or decrease in terms of a Z Test of two sample proportions

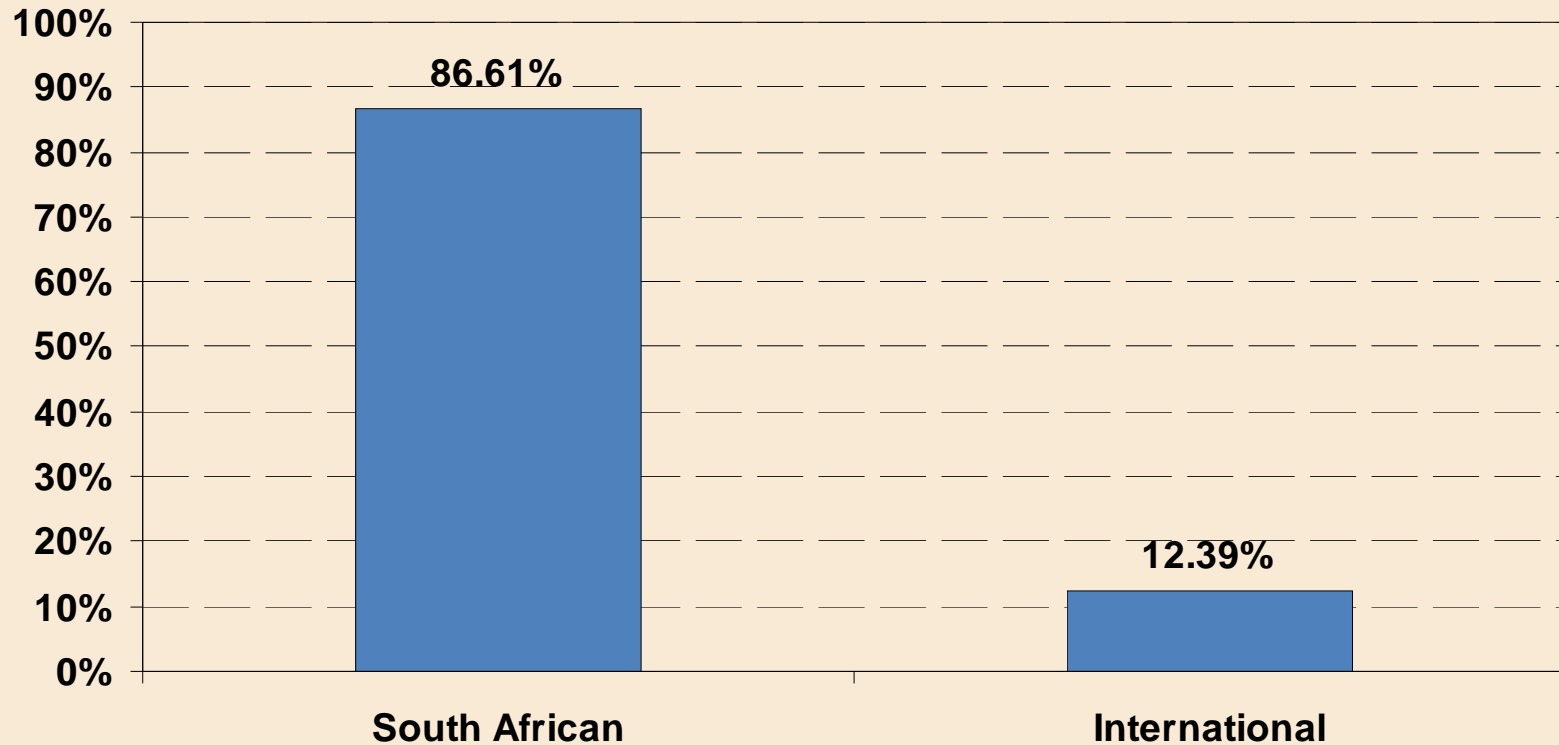


'Unique Spectators'

Days Attended	%	Estimated Spectators*
All Days	57	20,900
Sunday Only	14	15,400
Saturday Only	10	11,000
Saturday and Sunday	11	6,050
Friday Only	4	4,400
Friday and Saturday	3	1,650
Friday and Sunday	1	550
Total	100	59,950

* Derived from 110,000 tickets that were sold for the event

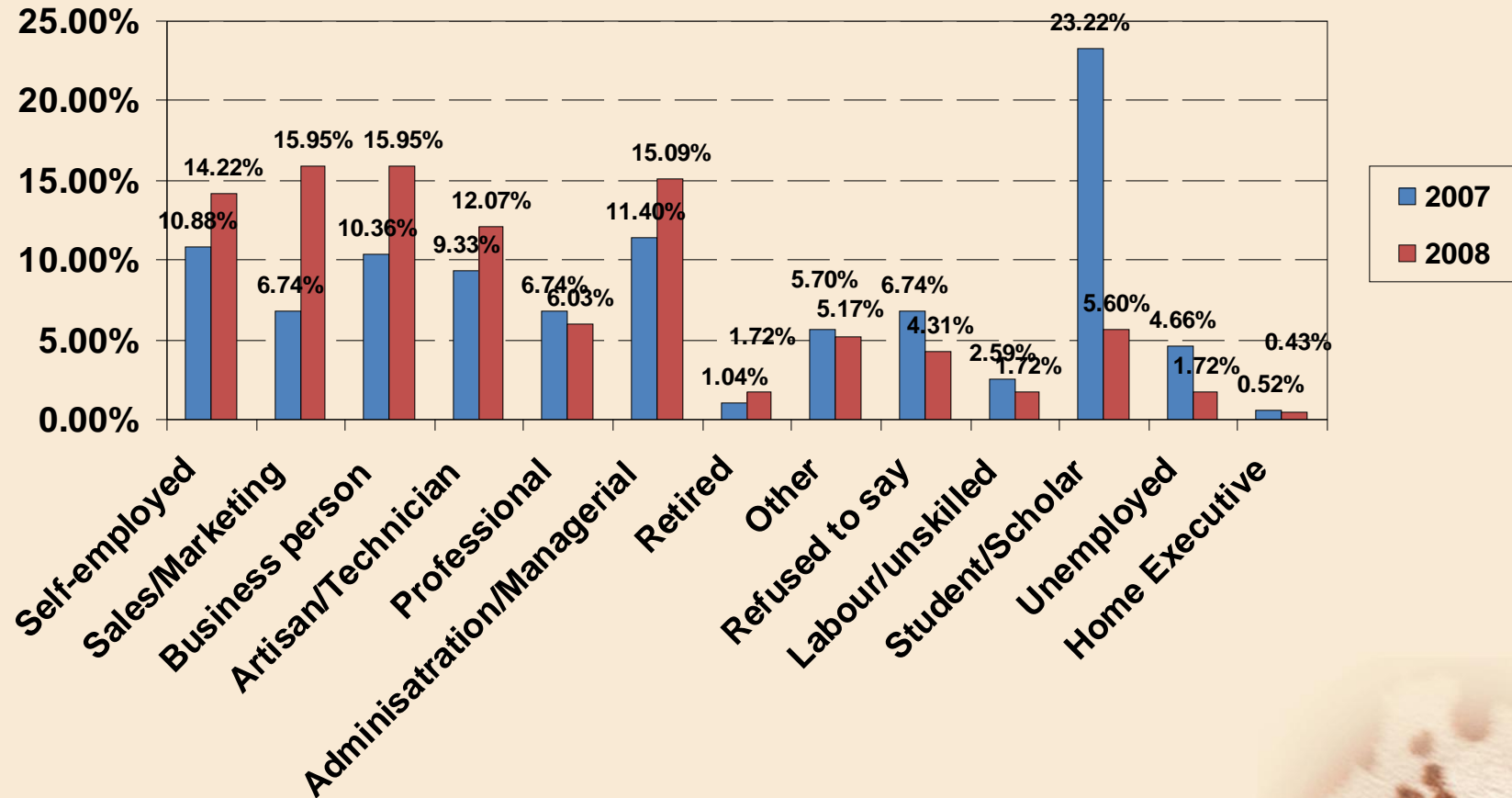
Nature of A1 Grand Prix Spectators



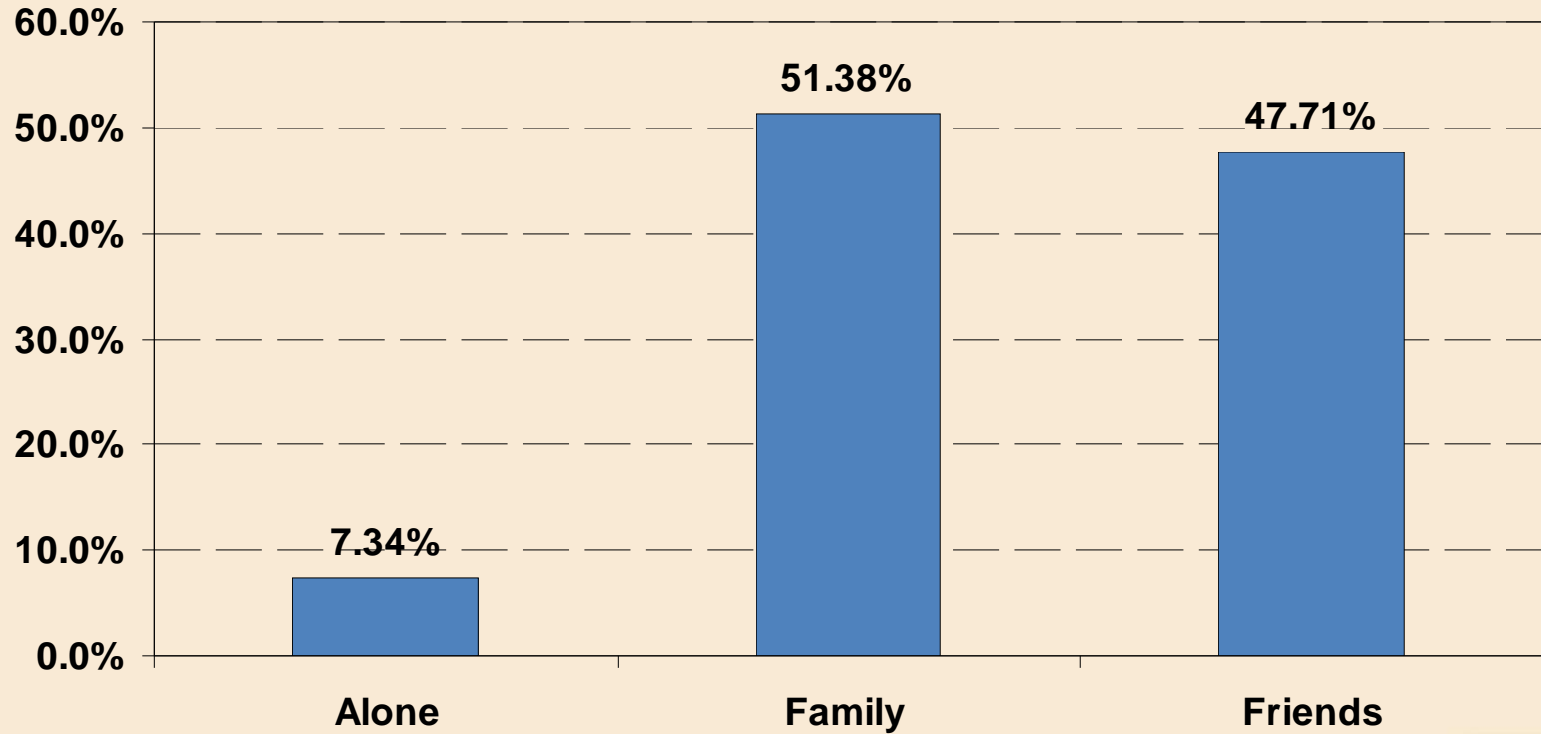
Source: Interact



Nature of A1 Grand Prix Spectators (Occupation)



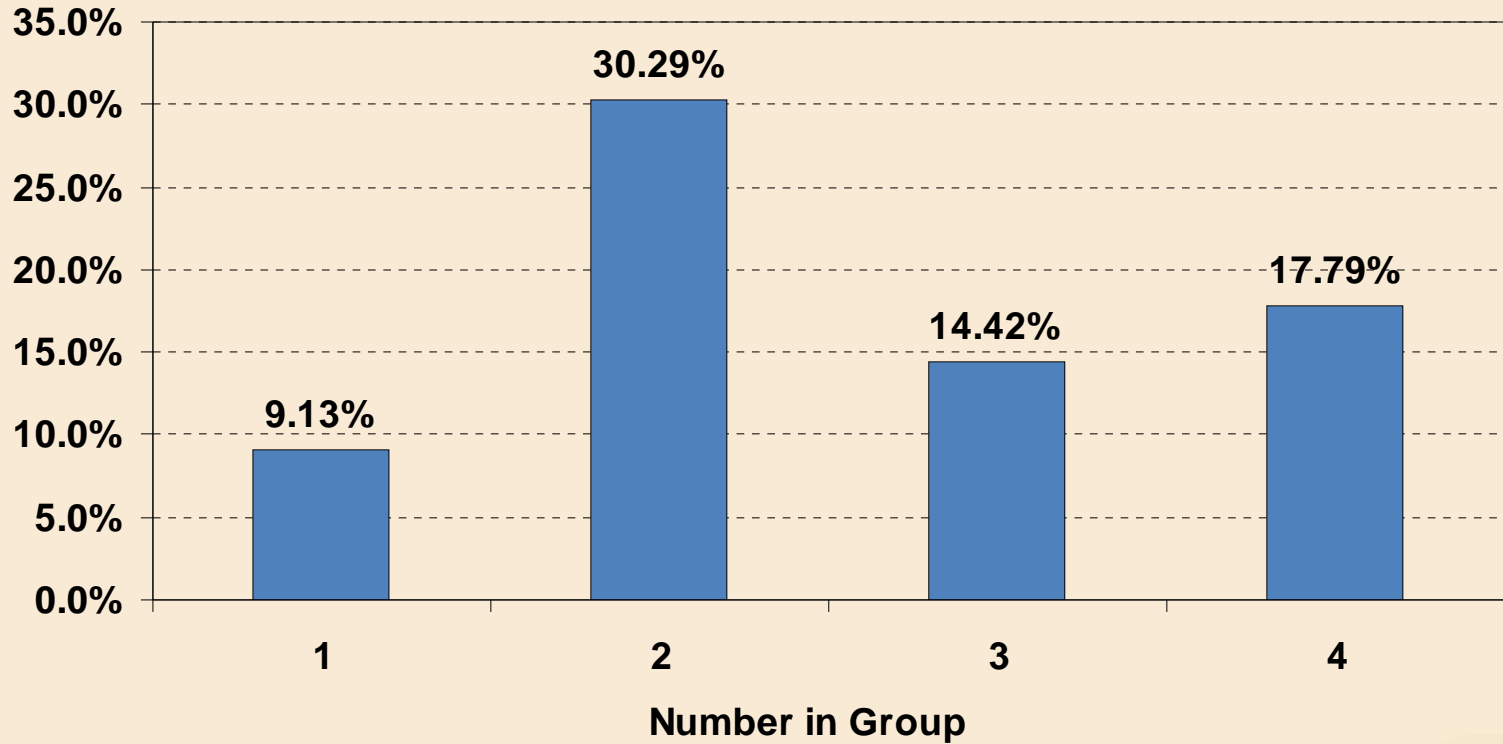
Who did you attend with?



Source: Interact



Size of Group



Source: Interact



Estimated Economic Impact of Spectator Spend (excluding ticket sales)

Item	Average Spend R	Number	Estimated Spend		
Paid Accommodation	2,600*	19,639 (33% of 59,950)	R51mn		
	2225**	Low Estimate	R44mn		
	2976***	High Estimate	R58mn		
Transportation	Overnight	33,592 (56% of 59,950)	R46mn		
	1,381*			Low estimate	R34mn
	1011**			High Estimate	R59mn
	1751***	13,695 (23% of 58,456)	R1.6mn		
	Day/Resident			Low Estimate	R0.6mn
	119*			High Estimate	R2.7mn
Food and beverages	837*	59,950	R50mn		
	693**	Low estimate	R42mn		
	980***	High Estimate	R59mn		
Entertainment	553*	54,554	R30mn		
	415**	Low estimate	R23mn		
	691***	High Estimate	R38mn		
Souvenirs and other purchases	517*	26,099 (44% of 59,950)	R13.5mn		
	288**	Low Estimate	R7.5mn		
	746***	High Estimate	R19.5mn		
Direct economic impact		No Margin of Error	R192mn		
		Low Estimate	R151mn		
		High Estimate	R236mn		
Total economic impact based on a multiplier of 1.42		No Margin of Error	R268mn		
		Low Estimate	R212mn		
		High Estimate	R331mn		

* 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



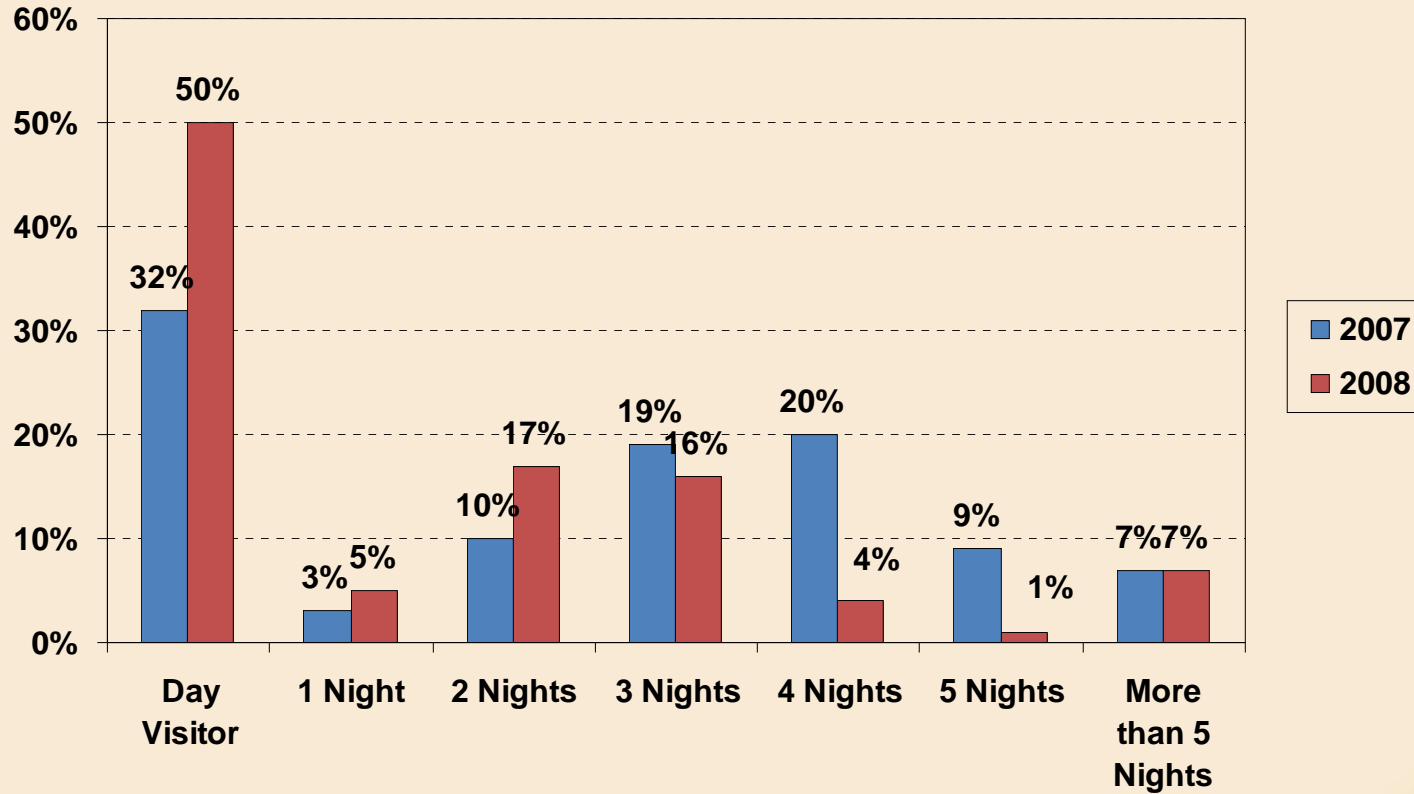
Estimated Economic Impact

- The direct economic impact was estimated to be between **R192mn** and **R236mn**.
- The total impact based on the multiplier of 1.42 was estimated to be between **R267mn** and **R331mn**.

Length of stay

	2007	2008
Day Visitor	32%	50%
1 Night	3%	5%
2 Nights	10%	17%
3 Nights	19%	16%
4 Nights	20%	4%
5 Nights	9%	1%
More than 5 Nights	7%	7%

Length of stay



Primary reason for visiting area where event is taking place?

	2007	2008
A1GP	76%	95%
VFR	2%	0%
Business	3%	3%
Other	19%	1%
Holiday	0%	1%



Accommodation: non-residents

	2007	2008
VFR	44%	17%
B&B	16%	8%
Self Catering	7%	1%
Family Hotel	11%	33%*
Luxury Hotel	20%	36%*
Other	2%	0%
Holiday Flat	0%	2%
Holiday Home	0%	3%

* Significant increase in terms of a Z Test of two sample proportions

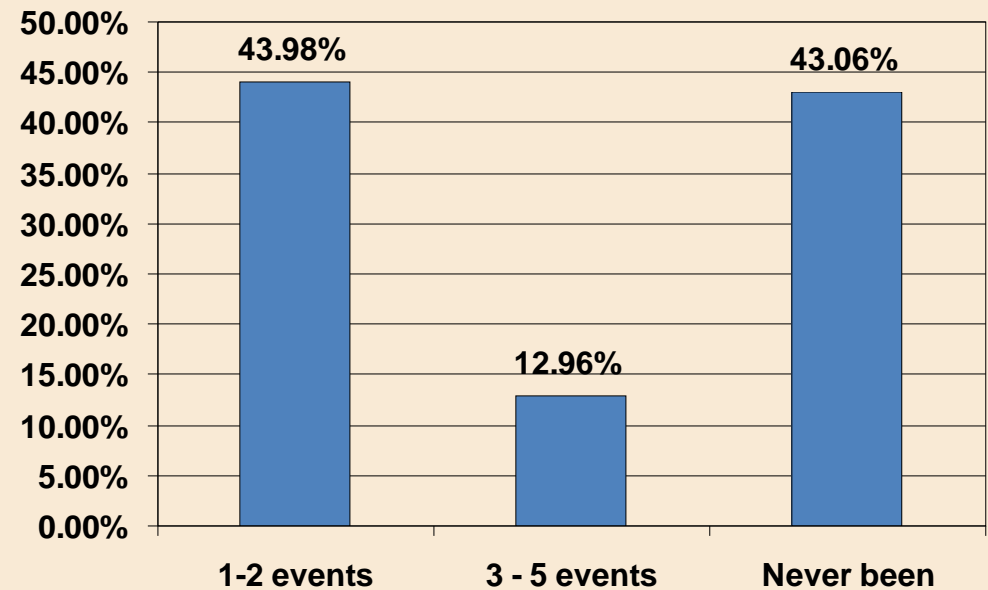
Transport to Event: non-residents

	2007	2008
Private Vehicle	82%	51%
Rental Vehicle	2%	2%
Mini-bus Taxi	6%	1%
Other	1%	0%
Airplane	8%	45%
Train	1%	0%
Bus	0%	1%

Attended the A1GP in previous years?

	2007	2008
Yes	49%	55%*
No	51%	45%

How many times?



Source:Interact

* A Z test indicate that this increase was not statistically significant.



Influenced to attend?

	2007	2008
Word-of-Mouth	30%	20%*
TV Ad	30%	30%
Newspaper/Magazine	3%	1%
Posters/Banners/Flyers	2%	2%
Radio	6%	4%
Other	6%	8%
Attended last year	23%	36%*

* Significant increase or decrease in terms of a Z Test of two sample proportions



Attend again?

	2006	2007	2008
Yes	87%	74%	81%*
No		8%	1%
Don't know		8%	18%

* A Z test indicate that this increase was not statistically significant.



Perceptions

Issue	2006 Average Rating out of 10	2007 Average Rating out of 10	2008 Average Rating out of 10
Traffic management & parking	7.4	7.1	7.2
Catering facilities	7.8	7.1	6.9
Atmosphere	8.5	8.1	8.5
Safety and security	8.6	8.2	8.6
Toilets	7.1	7.1	7.2
Choice of location (Durban)	9.3	9.1	9.3
Marshals and organisers	8.2	7.5	8.4
Layout of circuit	8.5	8.3	8.4
View of the circuit	7.2	7.2	7.7
Ticket prices	6.7	4.9	6.4
Information about the track & layout	6.1	5.4	6.4
Availability of programs and merchandise	6.1	5.2	6.3
Average	7.6	7.1	7.6

Suggested Improvements?

Suggestion	Mentions
Shelter on stands	20
Lack of information	20 ¹
More TV plasma screens or monitors	17
Signage	17 ²
Palm trees block view of circuit	15
Lower ticket prices	13
Traffic control/management	4
Entertainment between races	4
Security has no information	3
Parking	3
Improve selection of merchandise	1

1 = Signage to parking, seating and gates

2 = More race information. Expectation that security officials be trained to provide information on the location of stands and parking arrangements.

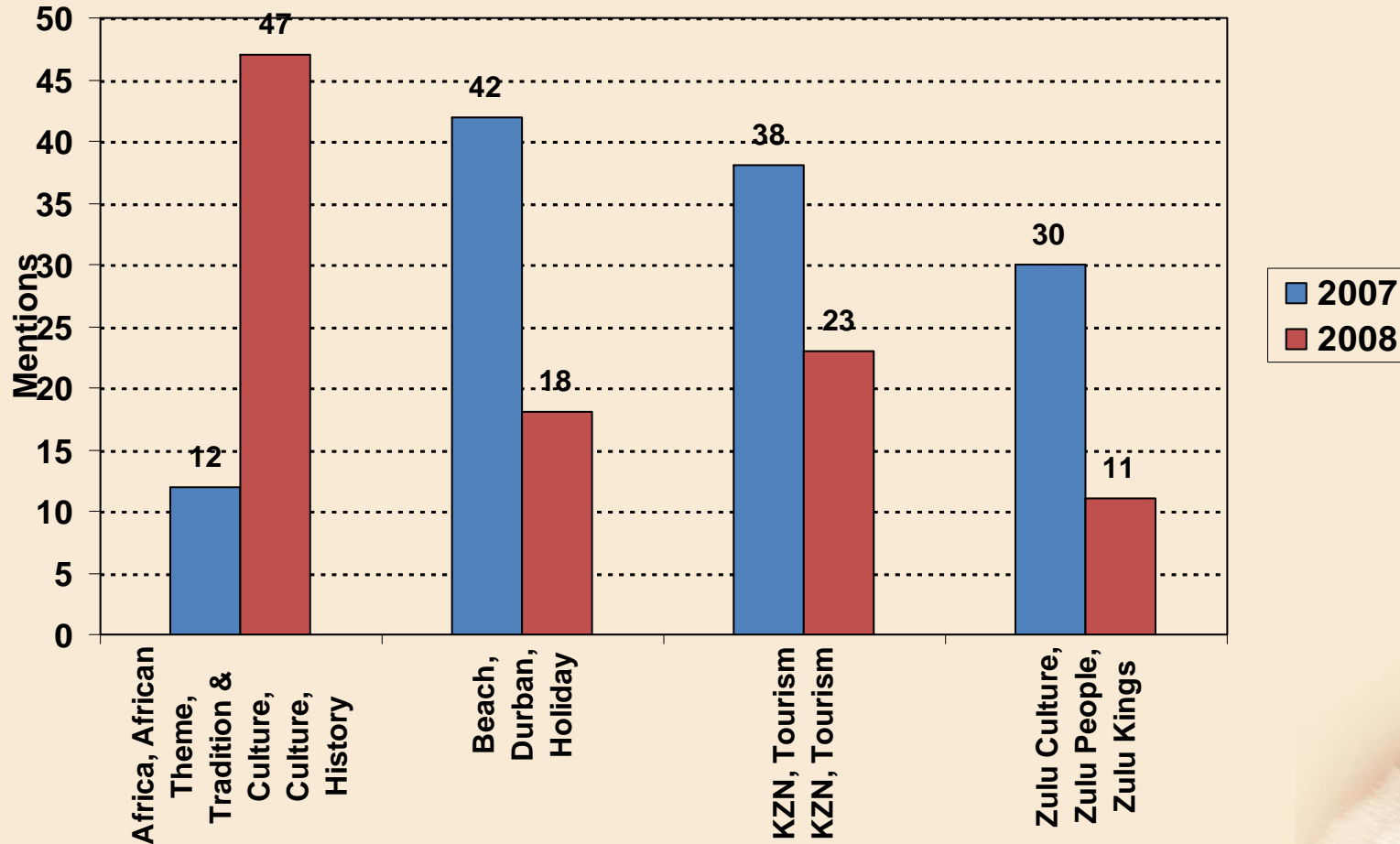
Familiar with Zulu Kingdom slogan?

	2007	2008
Yes	90%	77%*
No	10%	23%

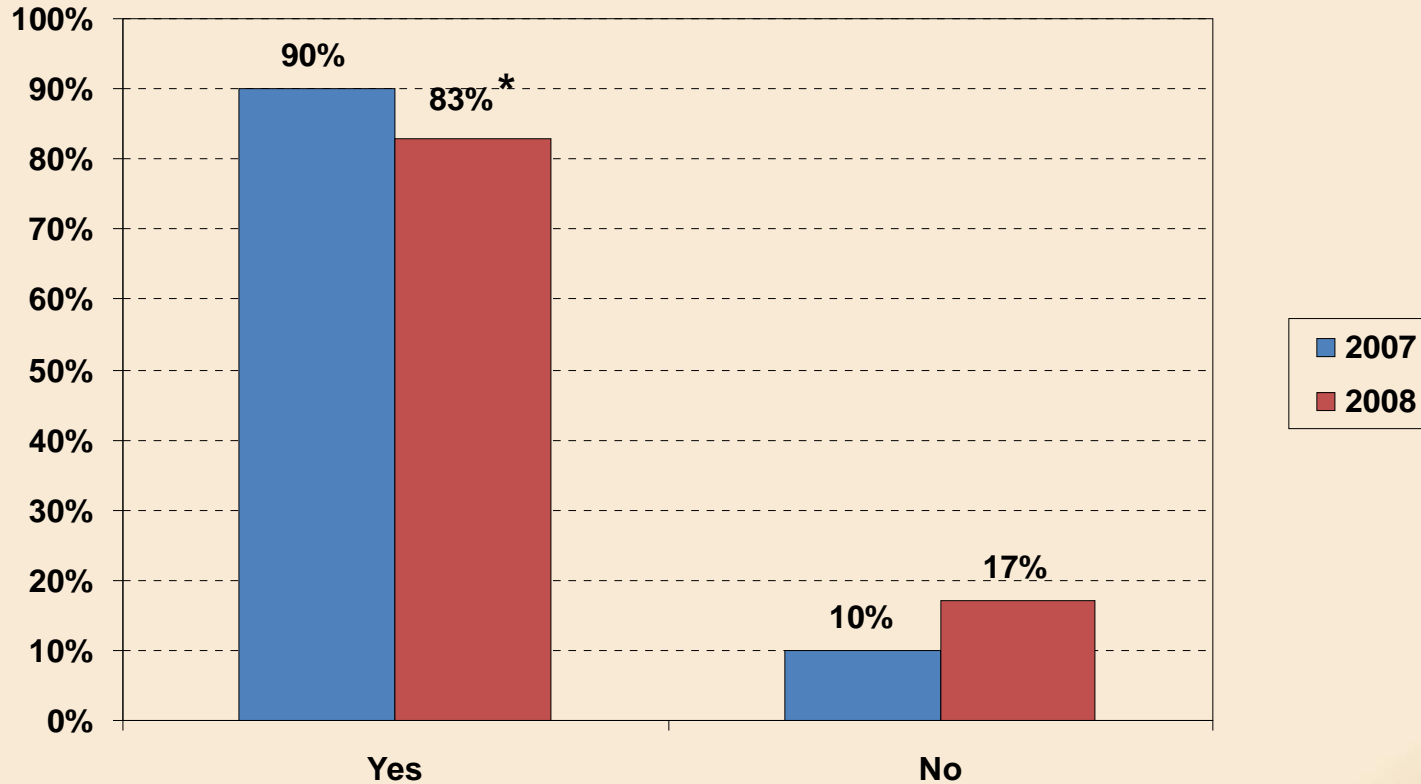
* A Z test indicates that this decrease was statistically significant.



Associations - Zulu Kingdom Slogan: Core Mentions



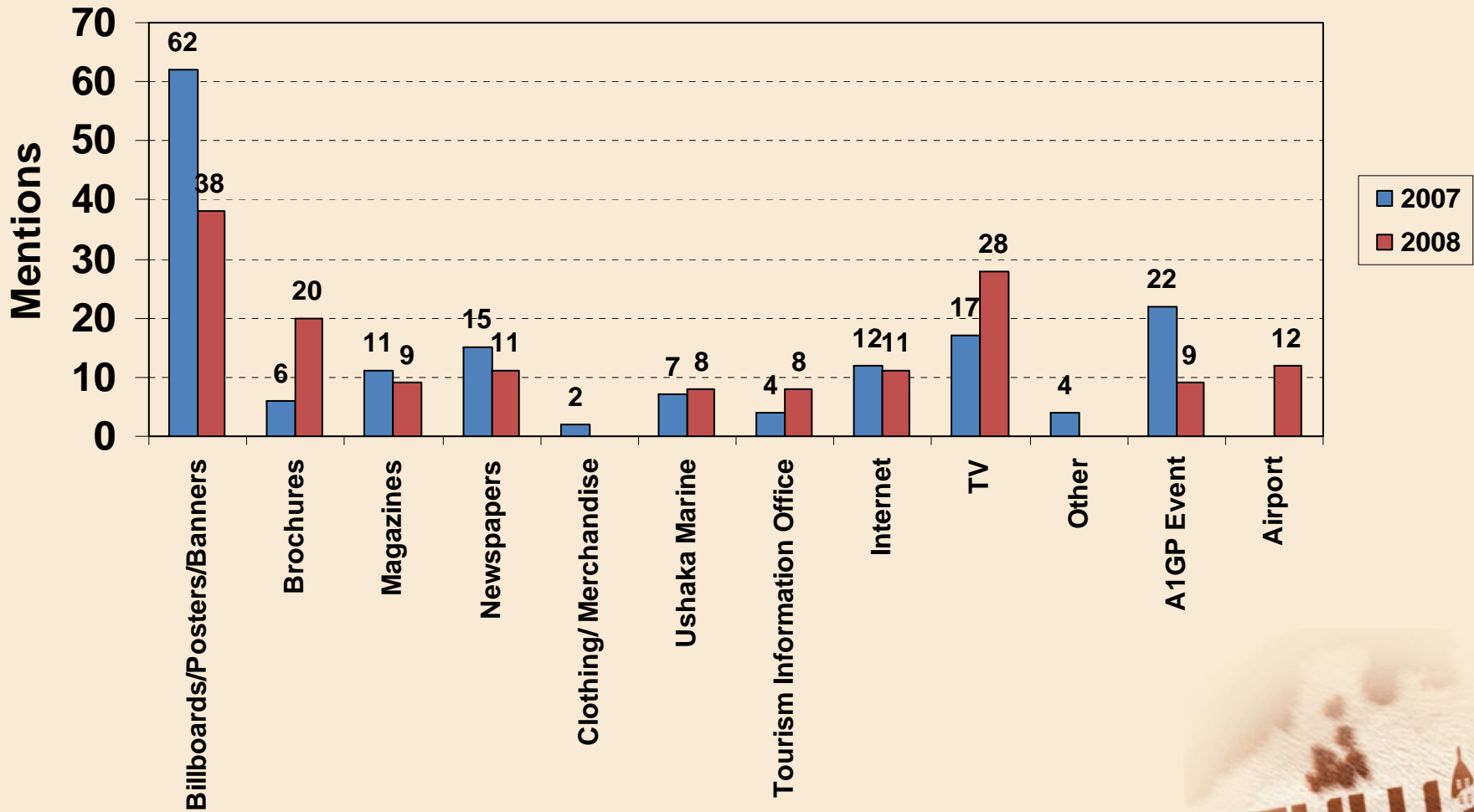
Noted Zulu Kingdom Logo?



* A Z test indicates that this decrease was statistically significant.



Where Zulu Kingdom logo noted?



Conclusion & Recommendations

- There was a statistically significant increase in the proportion of overnight spectators to the 2008 event. This was particularly the case in terms of foreign and KZN residents. This in turn led to a marked increase in the use of hotel accommodation. However, there was a statistically significant decline in the proportion of Gauteng overnight spectators. There thus appears to be a need to market this event more aggressively in that key leisure tourism generating market.
- There were fewer 'unique spectators' at this event than in 2007. However, the level of ticket sales was virtually the same as 2007.
- The organisers of this event need to take cognisance of some of the core improvement suggestions that were made by respondents. Certain of these suggestions, such as the need for sun screens and improved signage and information, were also made last year.
- The decline in the level of noting of the Zulu Kingdom logo may have been as a result of the fact that this logo was not as prominently on display at the 2008 event as was the case in 2007.