

MTN Amashova Classic – 16th and 17th October 2010

Impact Assessment: Top Line Summary Report



Wayne Tifflin
Karen Kohler
Tourism KwaZulu-Natal
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Methodology

Primary Data:

- 214 face-to-face interviews were conducted with respondents randomly selected on the day of the race at the finishing point as well as on the Saturday the 16th at the Expo and registration.
- The questionnaire was a structured one.

Note: the survey only covered the 106km and 40km races. The Minishova did not take place this year



Methodology

Secondary Data:

- Amashovashova organizers
- Cape Argus Cycle Tour organizers

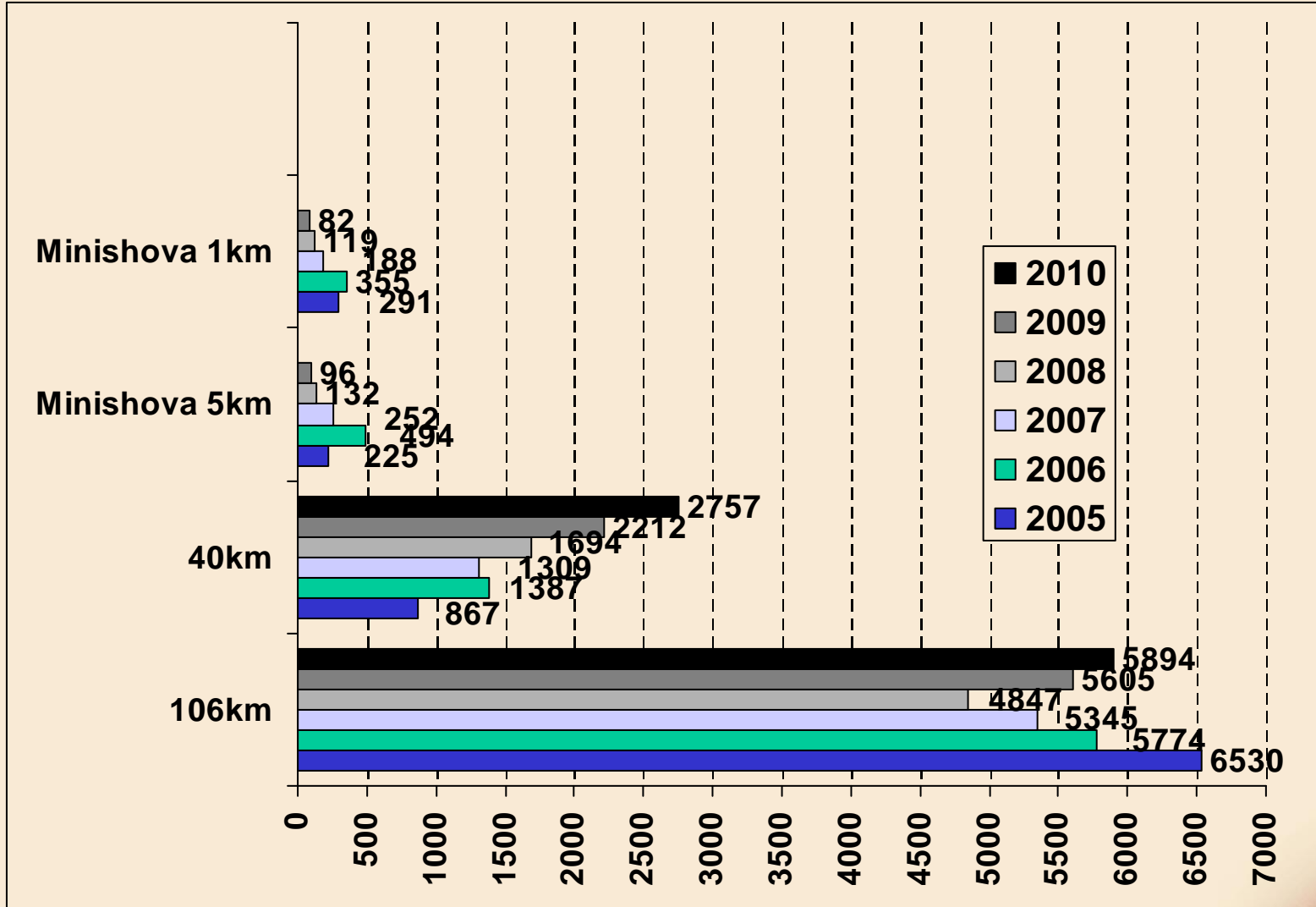


Entrants

Event	2005	2006	2007	2008	2009	2010
106km	6 530	5 774	5 345	4 847	5 605	5 894
40km	867	1 387	1 309	1 694	2 212	2 757
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

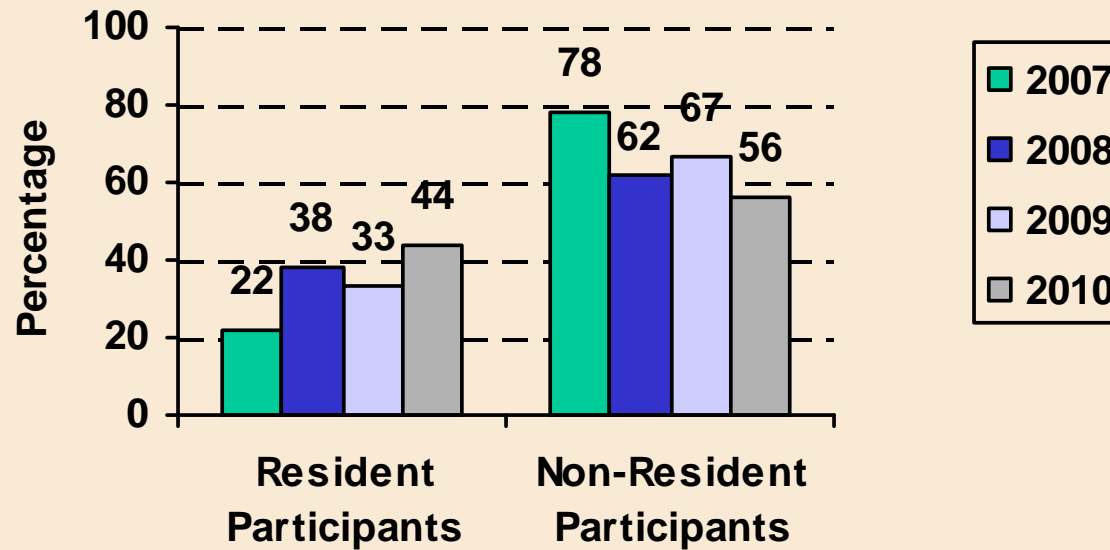
*Note: the minishova races did not take place this year.

Entrants (cont'd)



*Nature of Participants

Resident Participants vs Non-Resident Participants



*Respondents

A Z-test indicated a statistically significant ($p=0.0183$) increase in the resident vs non-resident participants between 2009 and 2010.

Entrants: International by Country

2007

Country	No.
Botswana	2
Mauritius	2
Namibia	3
Singapore	1
Swaziland	10
USA (Rhode Island)	1
UK	3
Total	23

2008

Country	No.
Dubai	1
Eritrea	4
Lesotho	6
Malawi	10
Middle East	2
Nigeria	6
Swaziland	2
UK	2
Zambia	5
Total	38

Source: Race Organisers



Entrants: International by Country

2009

Country	No.
UK	8
Swaziland	6
Botswana	3
Zimbabwe	3
Mozambique	1
Total	21

2010

Country	No.
UK	6
Swaziland	6
Australia	2
Belgium	1
USA	2
Switzerland	1
Namibia	1
Mozambique	1
UAE	1
Total	21

The number of entrants from foreign/international countries remained the same when compared to 2009.

Source: Race Organisers



Entrants: SA by Province

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

A Z-tests indicated a statistically significant (p-0.000) difference in KwaZulu-Natal participants when comparing 2009 and 2010. There is no statistical significant difference in the number of participants from the E. Cape between 2009 and 2010.

Nature and Extent of Cape Argus Cycle Tour Participants:

Province	2004	2004 (%)	2005	2005 (%)	2006	2006 (%)	2007	2007 (%)
Eastern Cape	2 010	5	1 833	5	1 775	5	1 814	5
Free State	2 270	6	1 821	5	1 629	4	1 519	4
Gauteng	13 506	33	13 413	35	13 833	36	12 920	33
KZN	2 307	6	2 321	6	2 455	6	2 279	6
Limpopo	529	1	447	1	374	1	417	1
Mpumalanga	956	2	906	2	585	2	819	2
North West	1 233	3	983	3	695	2	791	2
Northern Cape	1 081	3	932	2	814	2	829	2
Western Cape	16 932	41	15 554	41	15 868	42	18 213	46
TOTAL	40 824	100	38 210	100	38 028	100	39 601	100

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

Province	2008	2008 (%)	2009	2009 (%)	2010	2010 (%)
Eastern Cape	1 785	5	1 691	4	1 641	4
Free State	1 433	4	1 265	3	1 131	3
Gauteng	11 984	31	10 612	28	10 111	27
KZN	2 127	5	1 963	5	1 931	5
Limpopo	398	1	341	1	284	1
Mpumalanga	845	2	807	2	831	2
North West	883	2	819	2	791	2
Northern Cape	741	2	657	2	640	2
Western Cape	18 927	48	19 742	52	20 587	54
TOTAL	*39 123	100	37 897	100	37 947	100

This table indicates that from 2004, the majority of cyclists participating in the Cape Argus Cycle Tour are from the Western Cape and Gauteng .

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

Country	2004	2004 (%)	2005	2005 (%)	2006	2006 (%)	2007	2007 (%)	2008	2008 (%)
Asia	16	1	20	1	16	1	21	1	68	3
Aus/NZ	62	4	65	3	52	3	86	4	99	4
Europe	278	16	305	16	401	20	443	22	500	22
Middle East	15	1	22	1	31	2	36	2	14	0.5
North America	121	7	145	7	176	9	163	8	185	8
Rest of Africa	858	51	922	47	814	40	763	37	732	32
South America	3	0.2	2	0.1	3	0.1	5	0.2	11	0.5
UK	344	20	479	24	543	27	537	26	674	30
TOTAL	1 697	100	1 960	100	2 036	100	2 054	100	2 283	100

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

Country	2008	2008 (%)	2009	2009 (%)	2010	2010%
Asia	68	3	24	1	26	1
Aus/NZ	99	4	60	3	79	4
Europe	500	22	483	24	523	23
Middle East	14	0.5	45	2	77	3
North America	185	8	202	10	176	8
Rest of Africa	732	32	649	32	680	30
South America	11	0.5	4	0	14	1
UK	674	30	573	28	656	29
Central America					3	0.1
TOTAL	2 283	100	2 040	100	2 234	100

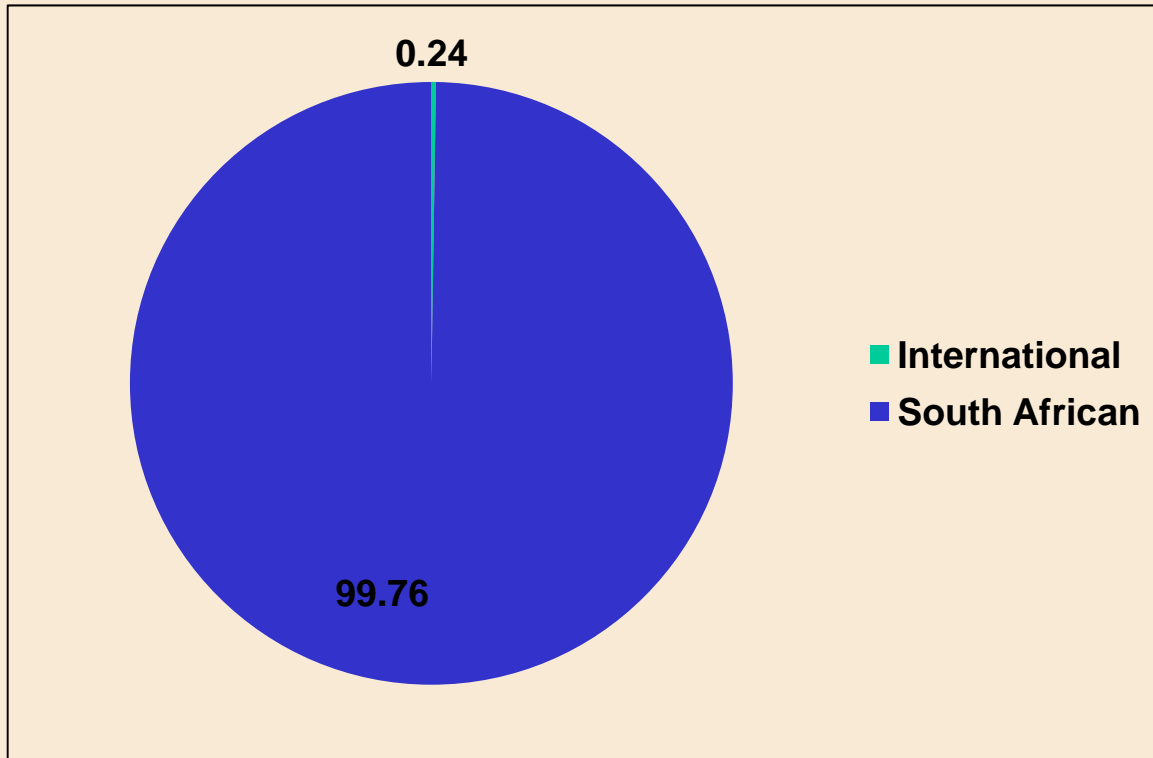
There was an increase in the number of international participants between 2009 and 2010.

Nature and Extent of Cape Argus Cycle Tour (Cont'd):

	2004 (%)	2005 (%)	2006 (%)	2007 (%)	2008 (%)	2009 (%)	2010 (%)
SA Cyclists	96	95	95	95	95	95	95
Non-SA Cyclists	4	5	5	5	5	5	5



Nature and Extent of South African vs International Participants:

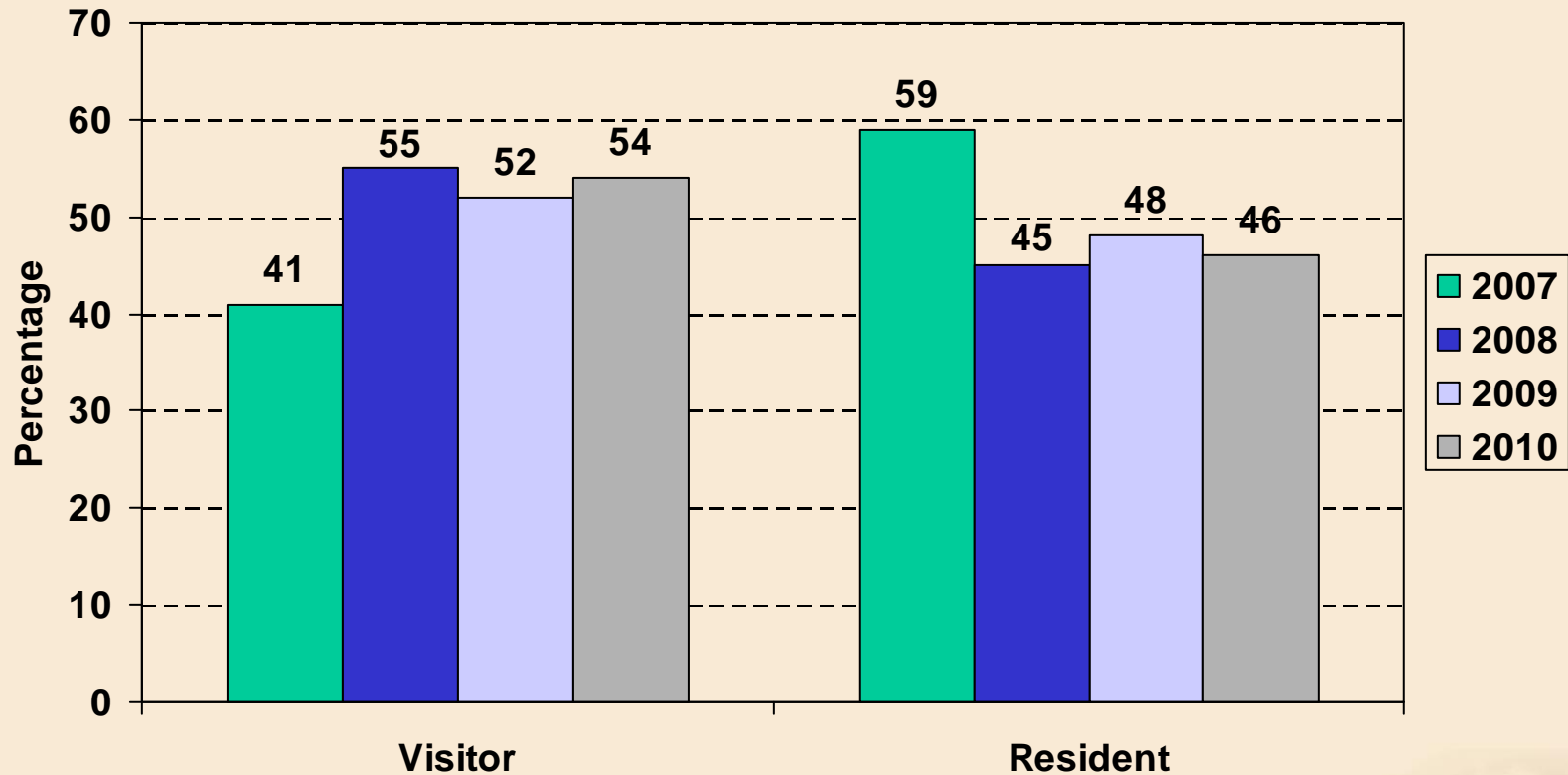


Comparison of Argus and Amamshova South African and Non-South African cyclists:

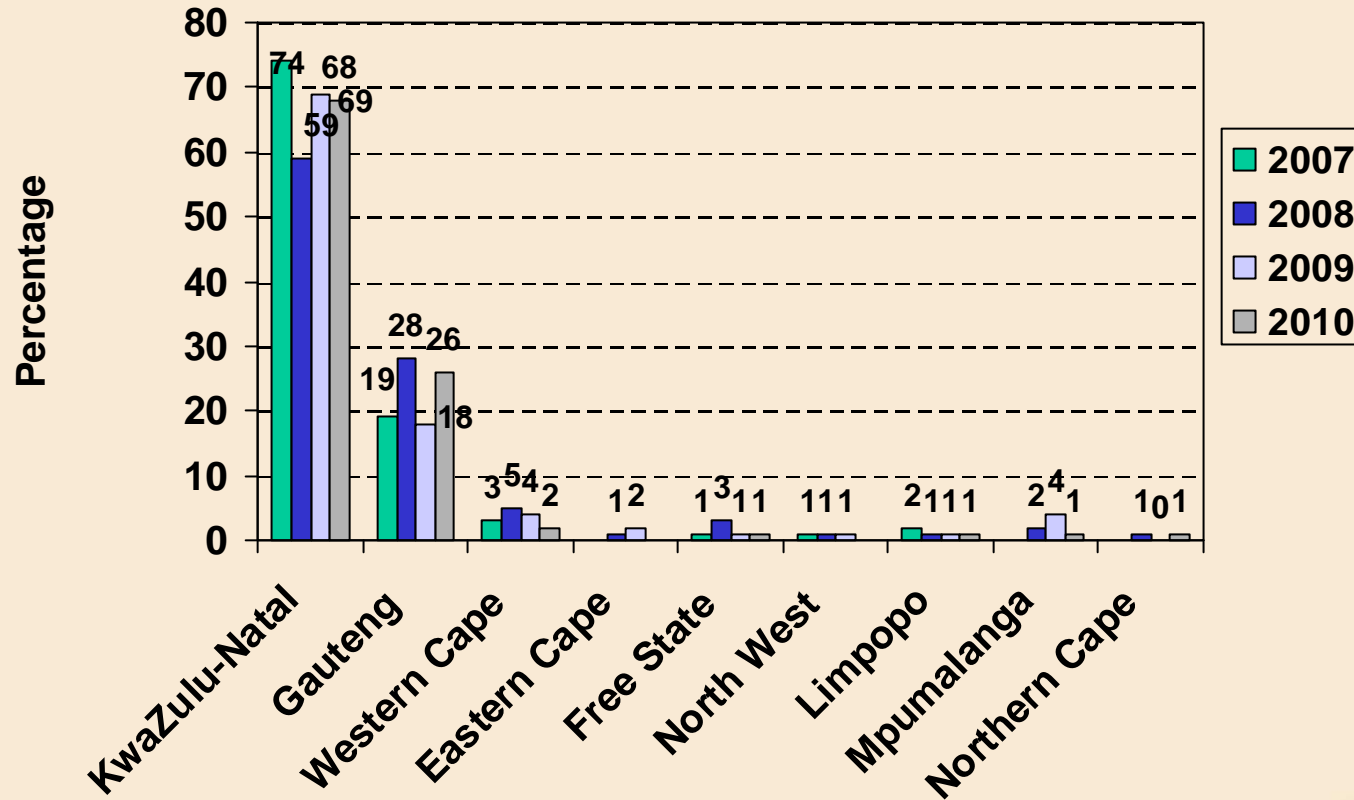
	Argus	Amashova
SA Cyclists	96	99.76
Non-SA Cyclists	4	.24



Nature of Domestic Respondents of Amashovashova



Nature of Respondents



A Z-test did not reveal a significant increase in the number of respondents from Gauteng . The probability of this assertion being false was 3.9%.



Average Group Size

2007	2008	2009	2010
3.1	3.0	3.1	2.9

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.

Margin of error = 5%

Median = 3

Mode = 2



Average Spend

- Mean spend in 2007 – R989.25

The expenditure taking standard error deviation into account was be a minimum of R805.04 and a maximum of R1 173.46

- Mean spend in 2008 – R1 554.13

The expenditure taking standard error deviation into account was be a minimum of R1 314.58 and a maximum of R1 793.68

- Mean spend in 2009 - R968.37

The expenditure taking standard error deviation into account was be a minimum of R769.79 and a maximum of R1 167.

- Mean spend in 2010 – R1 684.58

The expenditure taking standard error deviation into account was be a minimum of R1 350.17 and a maximum of R2 018.99.

A T-test based on a benchmark of .05 alpha, the estimated p value 0.000, suggested a statistically significant difference between the sample means of 2009 and 2010.

Breakdown of Non-Resident Spend

Item	2007	2008	2009	2010
Accommodation	R1 647.66	R1 559.00	R1 333.75	R1 804.41
Transport	R706.44	R1 079.01	R629.33	R 1 169.31
Food and Beverages	R522.15	R537.07	R368.78	R669.30
Entertainment	R543.10	R396.79	R356.00	R470.00
Souvenirs	R381.08	R503.33	R320.00	R452.08

Looking at 2009 and 2010, the average spend by non-residents increased across all spend items. This could be attributed to an increase in disposable income as the economy recovers from the recession.

Estimated Economic Impact: Resident Participants

	Number	Margin of Error	Spend	Total
2007	3 792	*Middle Estimate	R281.29	R1 066 656.61
		**Low Estimate	R231.96	R879 588.50
		***High Estimate	R330.62	R1 253 724.69
2008	2 486	*Middle Estimate	R351.76	R874 475.36
		**Low Estimate	R244.91	R608 835.57
		***High Estimate	R458.62	R1 140 138.52
2009	2 580	*Middle Estimate	R261.40	R674 310.05
		**Low Estimate	R192.68	R497 043.12
		***High Estimate	R330.12	R851 576.98
2010	3806	*Middle estimate	R541.15	R2 059 609.29
		**Low Estimate	R375.17	R1 428 896.26
		***High Estimate	R707.13	R2 691 322.32

* 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

A T-test based on .05 alpha , the p value of 0.003 suggested a statistically significant difference between the sample means of 2009 and 2010.



Estimated Economic Impact: Non-Resident Participants

	Number	Margin of Error	Spend	Total
2007	2 862	*Middle Estimate	R1 992.85	R5 703 536.76
		**Low Estimate	R1 554.85	R4 449 981.00
		***High Estimate	R2 430.85	R6 957 093.00
2008	4 055	*Middle Estimate	R2 425.23	R9 834 307.65
		**Low Estimate	R2 058.87	R8 348 725.96
		***High Estimate	R2 791.59	R11 319 905.56
2009	5 237	*Middle Estimate	R1 311.20	R6 867 265.77
		**Low Estimate	R1 155.04	R6 049 400.18
		***High Estimate	R1 467.36	R7 685 131.35
2010	4845	*Middle Estimate	R2 593.89	R12 566 285.29
		**Low Estimate	R1 982.34	R9 603 552.96
		***High Estimate	R3 205.45	R15 529 016.65

* 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

A T-test based on a benchmark of .05 alpha, of which the p vale of 0 suggests a statistically significant difference between the sample means of 2009 and 2010.



Estimated Economic Impact: Resident Spectators

	Number	Margin of Error	Spend	Total
2007	2 760	*Middle Estimate	R294.11	R811 760.99
		**Low Estimate	R161.03	R444 442.80
		***High Estimate	R427.20	R1 179 072.00
2008	1 920	*Middle Estimate	R296.57	R569 411.71
		**Low Estimate	R231.81	R445 075.20
		***High Estimate	R361.32	R693 734.40
2009	11 128	*Middle Estimate	R289.10	R3 217 104.80
		**Low Estimate	R203.07	R2 259 762.96
		***High Estimate	R375.13	R4 174 446.64
2010	8 875	*Middle Estimate	R425.00	R3 771 875.00
		**Low Estimate	R298.10	R2 645 637.50
		***High Estimate	R551.90	R4 898 112.50

* 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

A T-test of sample means suggests no statistically significant difference between 2009 and 2010.



Estimated Economic Impact: Non-Resident Spectators

	Number	Margin of Error	Spend	Total
2007	1 240	*Middle Estimate	R1 490.00	R1 847 600.00
		**Low Estimate	R638.63	R791 901.20
		***High Estimate	R2 341.37	R2 903 299.00
2008	1 080	*Middle Estimate	R2 316.00	R2 501 280.00
		**Low Estimate	R1 358.65	R1 467 342.00
		***High Estimate	R3 273.35	R3 535 218.00
2009	5 666	*Middle Estimate	R1 161.10	R6 578 792.60
		**Low Estimate	R677.57	R3 839 111.62
		***High Estimate	R1 644.63	R9 318 473.58
2010	7 561	*Middle Estimate	R2 393.67	R18 098 513.90
		**Low Estimate	R1 685.59	R12 774 768.70
		***High Estimate	R3 101.74	R23 452 263.70

* 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

A T-test with a benchmark of alpha .05, of which the p value of 0.005 suggests a statistically significant difference between the sample means of 2009 and 2010.

Estimated Total Economic Impact: Participants and Spectators

	2009	2010
*Direct Spend	Between R 9 888 511.80 and R17 003 604.93	Between R22 378 321.70 and R38 981 280.25
Total Spend	Between R14 041 686.80 and R24 145 119.00	Between R31 777 216.80 and R55 353 418.10

*Note: The direct spend is calculated by using the non-residents spend only/



Length of stay

	2007	2008	2009	2010
Day Visitor	74%	52%	35%	28%
1 Night	4%	7%	17%	12%
2 Nights	8%	21%	25%	27%
3 Nights	9%	9%	14%	22%
4 Nights	3%	7%	6%	4%
> 4 Nights	2%	5%	3%	7%

Z-tests do not show any statistically significant differences in the length of stay between 2009 and 2010.

Average length of stay

	2007	2008	2009	2010
Days	1.6	3.5	2.4	2.8

Z-tests do not show any statistically significant differences in the length of stay between 2009 and 2010.

Primary reason for visiting area where event is taking place?

	2007	2008	2009	2010
Participant	77%	68%	57%	67%
Spectator	20%	31%	42%	31%
Business	1%	0%	1%	0.5%
VFR	0%	1%	1%	0.5%
Holiday	2%	0%	-	0.5%
Other	-	-	1%	0.5%



Accommodation: non-residents

	2007	2008	2009	2010
Luxury Hotel	5%	12%	6%	5%
Family Hotel	12%	9%	9%	14%
B&B	15%	20%	16%	20%
Holiday Flat	13%	12%	10%	7%
Self-Catering	8%	6%	7%	11%
Holiday Home	9%	9%	4%	3%
VFR	37%	32%	45%	39%
Other	-	-	1%	1%

A Z-test revealed no significant differences in B&B and Self –catering accommodation preferences between 2009 and 2010.

Transport to Event: non-residents

	2007	2008	2009	2010
Private Vehicle	81%	77%	79%	89%
Airplane	11%	10%	14%	6%
Rental Vehicle	1%	1%	2%	2%
Mini-Bus Taxi	3%	2%	2%	
Bus	2%	1%	1%	1%
Other	0%	9%	2%	3%
Train	2%	0%	-	-

A Z-test indicated no statistical significant difference in *private vehicle* and *airplane* travel between 2009 and 2010.

Attend in previous years?

	2007	2008	2009	2010
Yes	67%	78%	85%	67%
No	33%	22%	15%	33%

A Z-test based on a benchmark of alpha .05, the estimated p value of 0.0002 suggested that there is a statistically significant difference in the respondents who attended in previous years between 2009 and 2010. (see comment 8 in findings)

Influenced to attend?

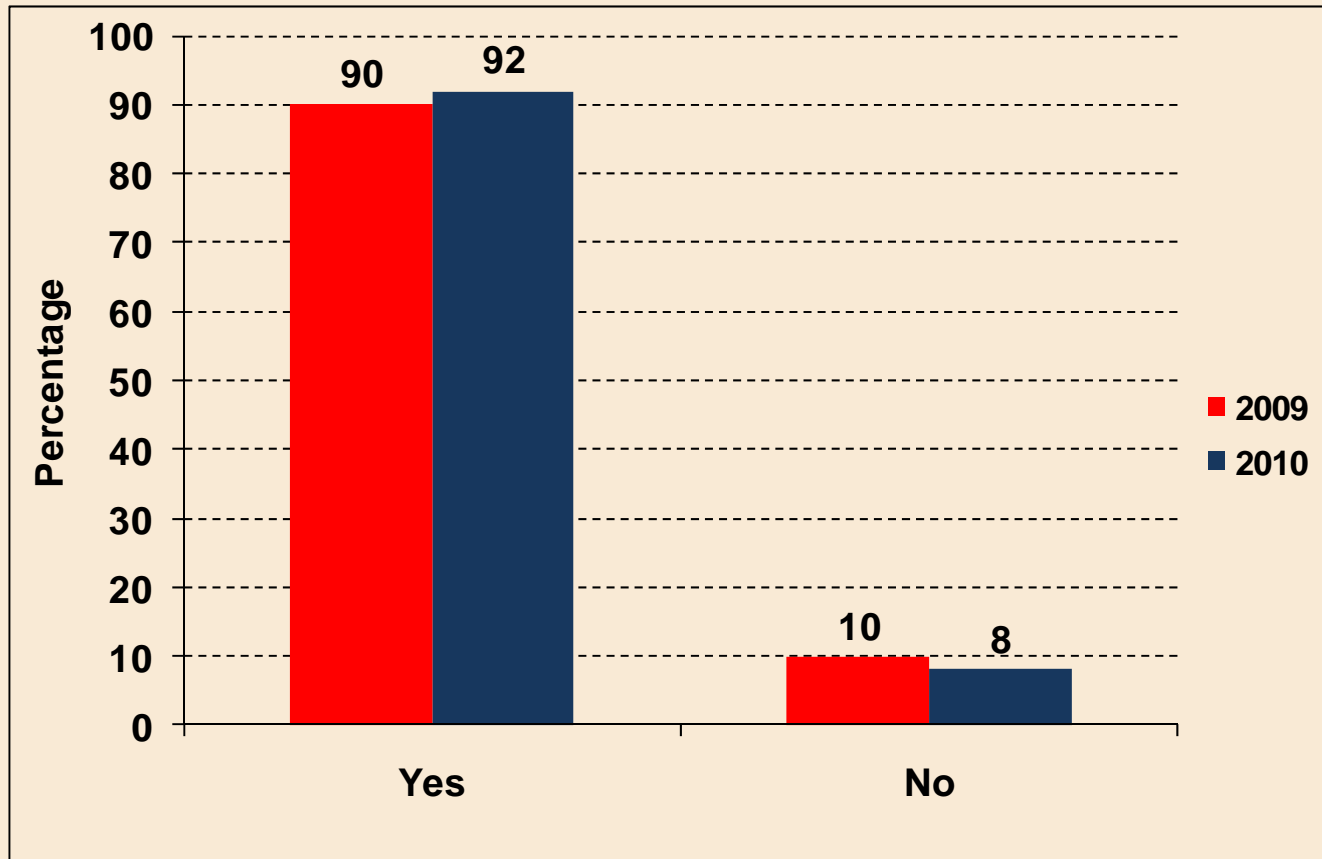
	2007	2008	2009	2010
Word-of-mouth	70%	64%	30%	55%
TV Ad	8%	7%	6%	
Newspaper/Magazine	5%	4%	2%	2%
Posters/Banners	2%	1%	5%	2%
Participated /Attended Previously	0%	19%	53%	35%
Other	12%	3%	4%	6%
Radio	3%	2%	-	1%

In a Z-test based on a benchmark of .05 alpha, the p value of 0.0015 suggested a statistically significant difference in the respondents who were influenced by *word-of-mouth* to attend the event between 2009 and 2010.

There is also a statistically significant difference in respondents (p=0.0168) who *participated or attended previously* between 2009 and 2010.

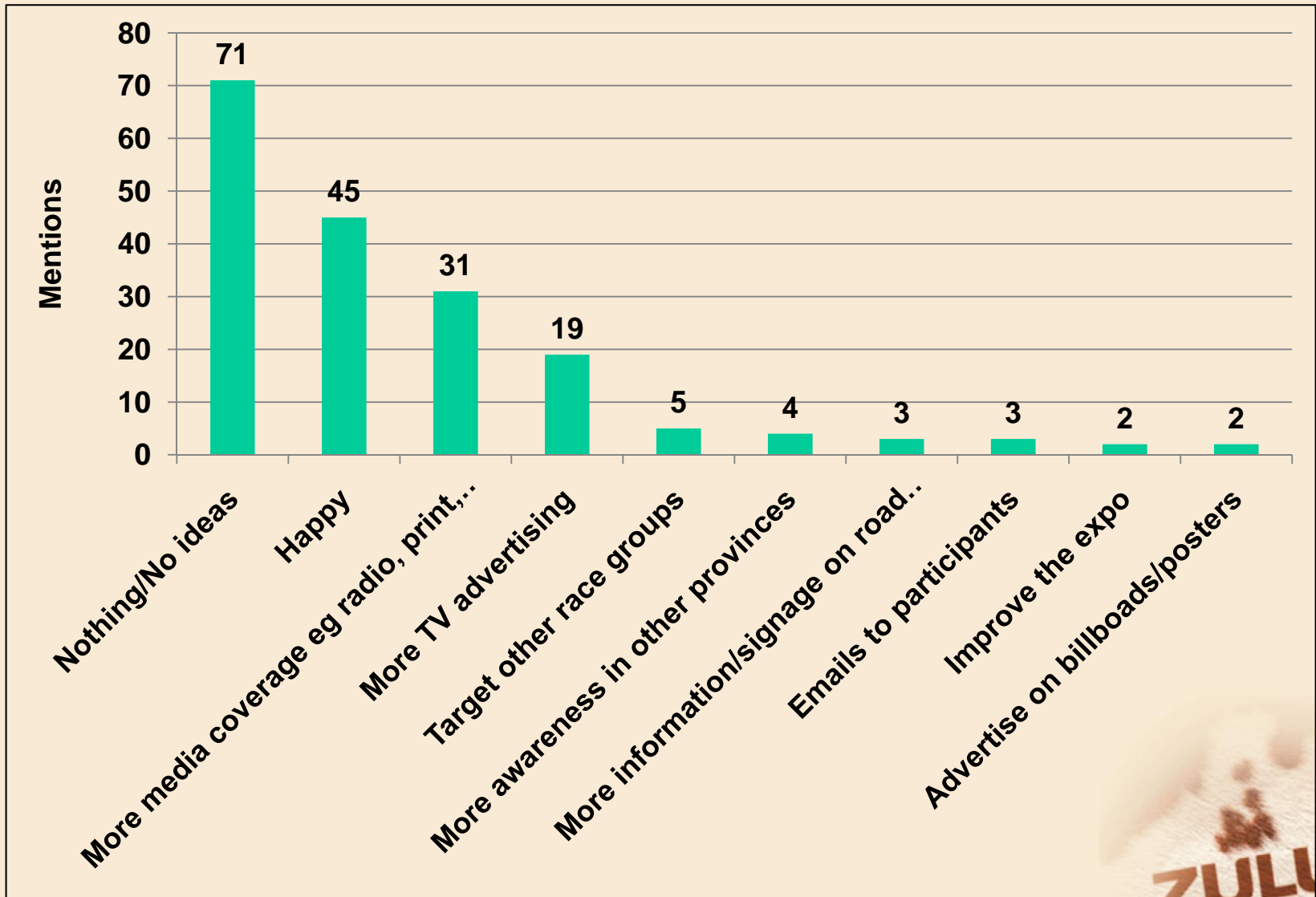


Satisfied with information?



A Z-test did not reveal any statistical significance between 2009 and 2010.

Respondents Suggestions: marketing of the event in future?



Attend again?

	2007	2008	2009	2010
Yes	86%	88%	81%	94%
No	2%	1%	2%	2%
Don't Know	12%	11%	18%	4%

A Z-test revealed that there is a statistically significant difference ($p=0.0002$ between 2009 and 2010 of respondents who would attend the event again.

There is no statistically significant difference in the *Don't Know* category.

Attend again?

	Participants	Participants	Spectators	Spectators
	2007	2008	2007	2008
Yes	89%	89%	79%	85%
No	1%	1%	2%	2%
Don't Know	10%	10%	19%	13%



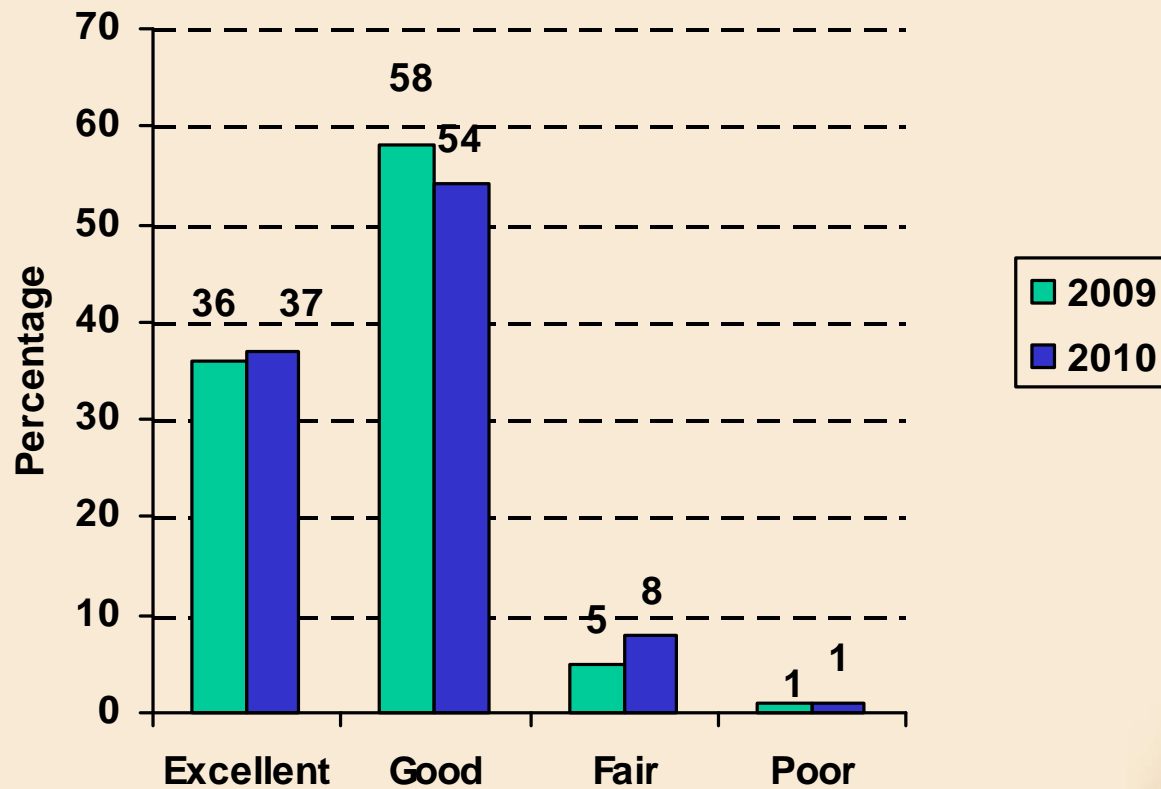
Attend again?

	Participants	Participants	Spectators	Spectators
	2009	2010	2009	2010
Yes	83%	95%	78%	94%
No	2%	1%	1%	1%
Don't know	15%	4%	20%	5%

A Z-test revealed a statistically significant ($p=0.0033$) difference in participant respondents who would attend the event again.

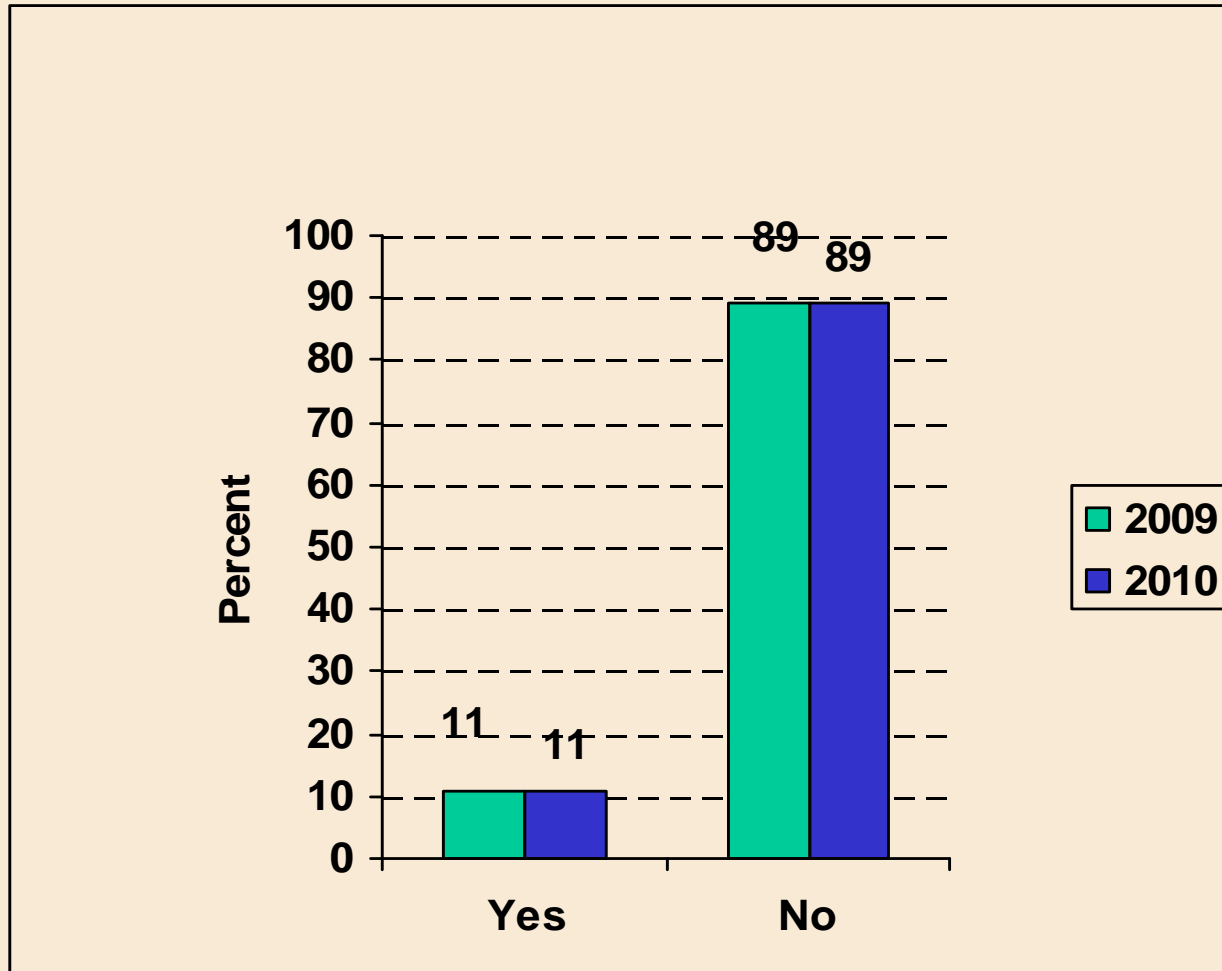
A Z-test revealed a statistically significant ($p=0.0098$) difference in spectators respondents who would attend the event again.

Experience Rating



There are no statistical significant difference between 2009 and 2010.

Experienced problems at the event?

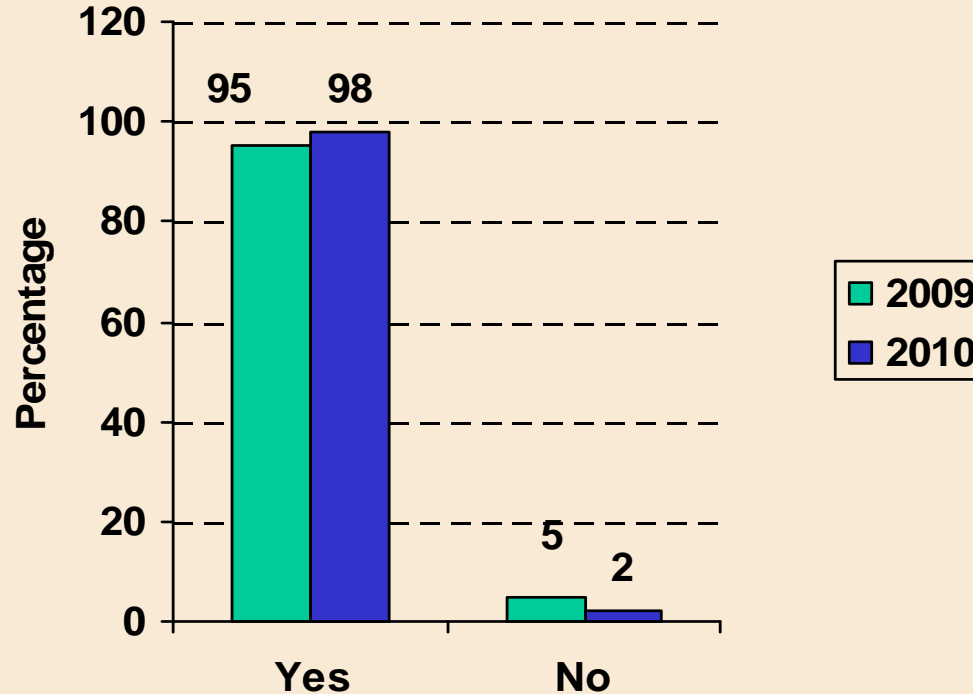


Problems experienced by respondents at the event? Reasons

- Better accident response
- Bad registration process
- Cut off too early
- Inexperienced riders
- No clear exit signage for cyclists
- People joining race anywhere
- Parking area is too small – during registration
- No information on road closures
- Transport back to the start needed



Recommend the event to family & friends?



REASONS FOR RECOMMENDING THE EVENT

- A good outdoor event
- It is good for exercise
- Fun/enjoyable
- Good sport
- Well organized event

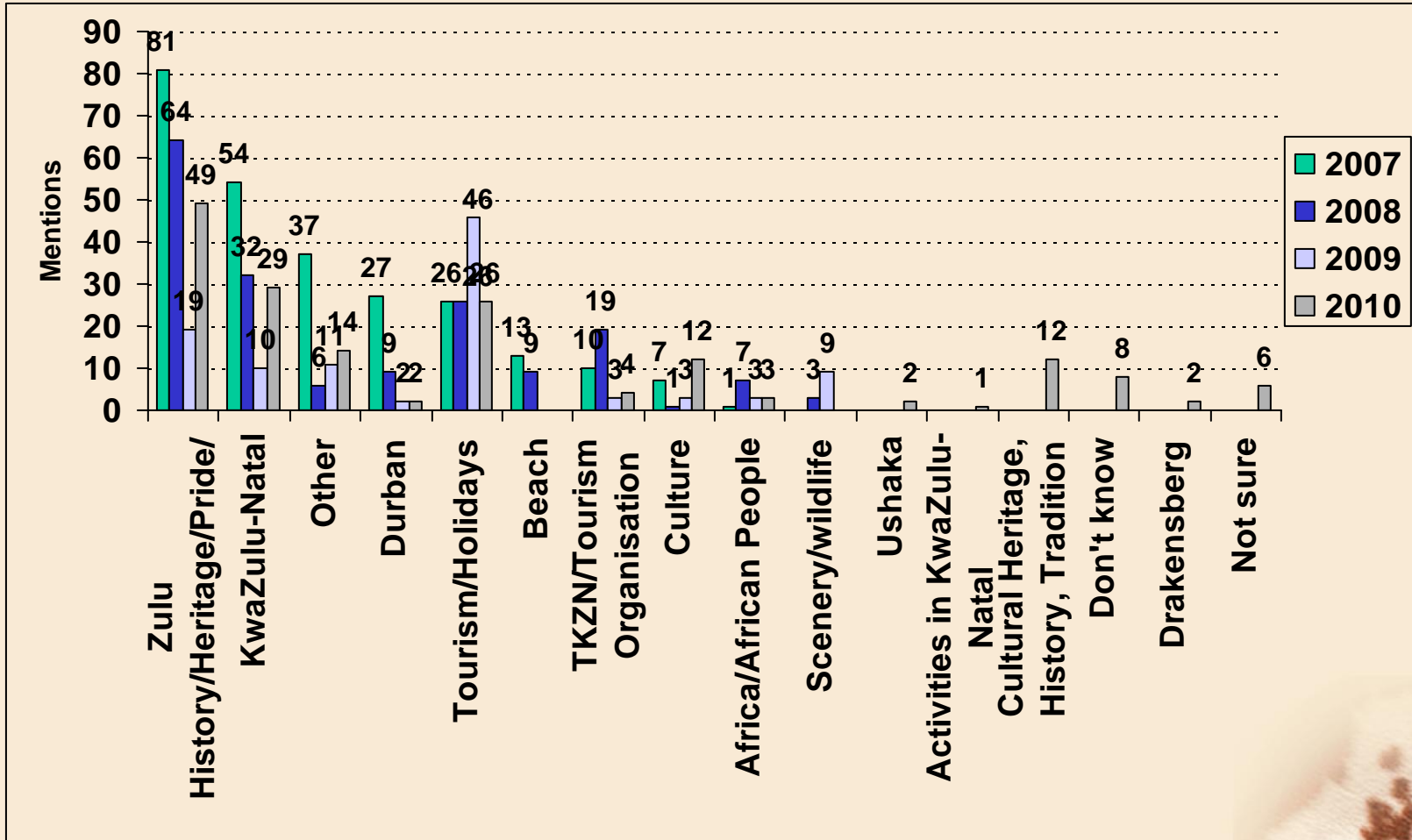
Familiar with Zulu Kingdom slogan?

	2007	2008	2009	2010
Yes	82%	78%	68%	71%
No	18%	22%	32%	29%

A Z-test indicated no statistical significance between 2009 and 2010.



Associations - Zulu Kingdom slogan: Core Mentions



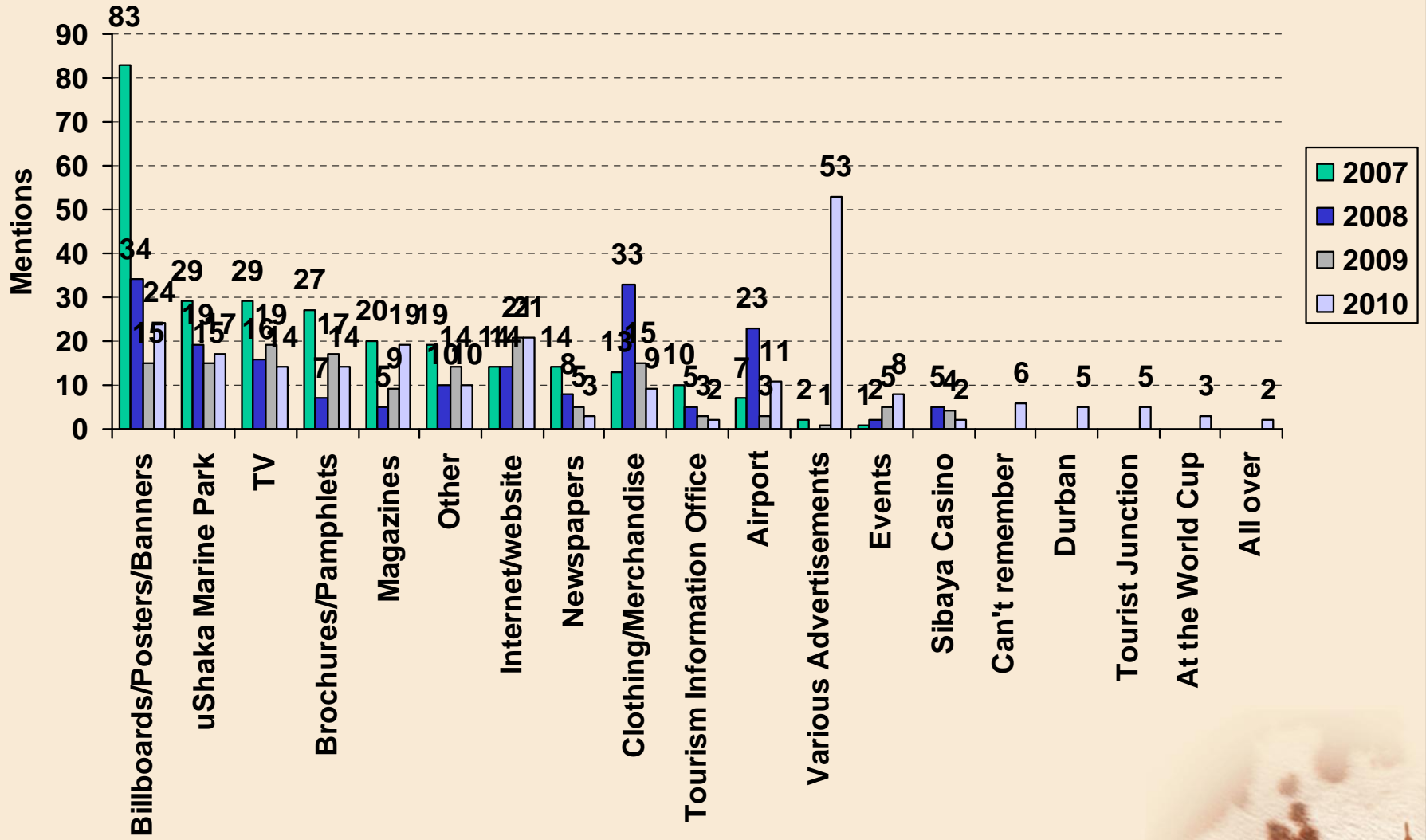
Noted Zulu Kingdom logo?

	2007	2008	2009	2010
Yes	86%	85%	82%	76%
No	15%	15%	18%	24%

A Z-test indicated no statistical significance between 2009 and 2010.



Where Zulu Kingdom logo noted?



Main Findings

1. The 2010 event saw an increase in the number of entrants for both the 106km and 40km events. This was the second consecutive increase of participants.
2. Looking at both the MTN Amashova Classic and the Cape Argus Cycle Tour, the Argus did show an improvement over 2009 in terms of international participation. However, the Amashovashova's international participation remained the same at 21.
3. In terms of the actual figures from the organizers, the majority of entrants for the Amashova came from KZN and Gauteng. About 28% of the participants came from Gauteng. At the Argus in 2010 27% came from Gauteng.
4. There was an increase in the number of participant respondents who are resident in Durban overall. This may be an indication of the growing support for the race among locals. However, visitors to Durban still out number the residents of Durban.
5. Comparing 2009 and 2010, the average spend by non-residents increased across all spend items. This could be attributed to an increase in disposable income as the economy recovers from the recession as well as increased costs.
6. The average total spend of the respondents showed an increase from 2009 to 2010 from R968.37 in 2009 to R1 684.58 in 2010.

Main Findings

7. There is no statistical increase in the number of days that respondents stayed in Durban.
8. There was a significant increase in the number of respondents who indicated that they had not attended the event previously. This indicates that the event is attracting 'new' people to the event. This relates to the decline in respondents who indicated that they either attended or participated previously.
9. About 92% indicated that they were satisfied with the information provided. However, some of the suggestions for, marketing, the event were:
 - Appeal to more race groups
 - Better signage at parking
 - Better training of volunteers
 - Use social media more
 - Improve the Expo
10. There was an increase in the number of respondents who indicated that they would attend the event again. This bodes well for the future of the event due to the fact that many were new attendees at the event. When considered separately, both the participants and spectators indicated that they would attend the event again.
11. Some of the poor experiences mentioned were:
 - Need better accident response
 - Poor registration process
 - Parking area too small at registration
 - Too many inexperienced riders
 - Cut-off too early



Main Findings

12. About 98% of respondents indicated that they would recommend the event to friends and family.
13. 71% of the respondents indicated that they were familiar with the Zulu Kingdom slogan.
14. There seemed to be an increase in the respondents who associated the Zulu Kingdom slogan with Zulu tradition and culture and a decline in the association with tourism and holidays.
15. There was a no significant decline in the number of respondents who noted the logo.
16. Many of the logos were seen in various advertisements.
17. There was a significant increase in the role played by word-of-mouth in influencing respondents to attend the event.



Recommendations

1. The organizers should vigorously engage with cycling clubs in other provinces so as to increase entrants from SA provinces other than Gauteng. This would assist in increasing the number of participants overall and ultimately spectators from other provinces.
2. The organizers should undertake vigorous marketing to expose the race internationally and thus attract a far greater proportion of international cyclists.
3. The organizers should work together with the cycling union to increase the demographic profile of participants at the event in response to the comments made about increasing the number of cyclists from other trace groups.
4. Parking at the Expo needs to be increased. Perhaps the outer fields at the ABSA stadium could be used.
5. TKZN should set up banners that not only show the logo but also the destination. This would help to establish a stronger association between the recognition of the logo and KwaZulu-Natal as a holiday destination.

