

Comrades 2014 Impact Assessment: Top Line Summary Report



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Methodology



- Primary data:
 - Face to face survey – 299 respondents
 - Stratified probability sample – 199 participants and 97 spectators.
 - Respondents systematically selected over 3 days (29 May-31 May 2014) before event at the ‘Comrades Experience’ and at the finishing point on the day of event on 1 June 2014.
- Secondary data: Comrades Marathon Association



Positive Highlights



- There was an increase of 48 international participants in 2014 when compared to 2013.
- 83% of the participants said they would attend the event again in future.
- 94% of those interviewed said they had either a *good or excellent* experience.
- 95% said they would recommend the event to family and friends
- 98% indicated they would recommend KZN to family and friends.
- 96% were satisfied with the information they received
- 77% plan to visit KZN for a holiday in the next 12 months.



Nature and Extent of Comrades Participants



South African Regions

	2008	%	2009	%	2010	%	2011	%	2012	%	2013	%
KwaZulu-Natal	3 088	-9	3 642	18	5 885	25.5	4 417	24	5 700	29	4 058	-29
Central Gauteng	3 068	-5	3 600	17	6 313	26.8	5 180	28	4 300	-17	5 896	37
Gauteng North	1 187	-12	1 349	14	2 681	11.4	2 015	11	2 222	10.3	2 216	-0.3
Western Province	736	-10	914	24	1 904	8.1	1 416	7.7	1 391	-1.8	1 464	0.1
Mpumalanga	581	-10	680	17	1 114	4.7	847	4.6	833	-1.7	789	-0.1
Unknown			-	-	789	3.3	1 599	8.7	-	-	0	-
Free State	428	-4	437	2	680	2.9	507	2.8	561	10.7	548	-0.2
North West	283	-8	329	16	536	2.1	379	2.1	418	10.3	376	-0.2
Limpopo	305	-5	345	13	494	2.3	459	2.5	426	-7.2	423	-0.2
Eastern Province	256	1	256	0	523	2.2	405	2.2	347	-14.3	362	0.3
Vaal Triangle	145	-6	168	16	312	1.1	248	1.0	266	7.3	239	-0.3
Central North West	155	-6	168	8	249	1.3	189	1.3	167	-11.6	157	-0.6
Boland	98	-8	127	30	281	1.2	194	1.1	216	11.3	203	-0.4
Border	122	5	121	-1	232	1.0	184	1	165	-10.3	172	0.6
South West Districts	93	-8	113	22	259	1.1	146	0.8	174	19.2	145	-0.5
Griqualand West	40	-	45	13	49	0.2	50	0.3	50	0	49	-2.0
North West Cape	41	-	41	0	54	0.2	45	0.2	42	-6.7	64	3.6
Transkei			11	-	22	0.1	20	0.1	29	45	36	4.3



Nature and Extent of Comrades Participants



South African Regions

Province	2013	%	2014
KwaZulu-Natal	4 058	13%	4 573
Gauteng	8 315	4%	8 646
Western Province	1 812	5%	1 902
Mpumalanga	789	11%	875
Free State	548	3%	567
North West	533	4%	556
Limpopo	423	18%	499
Eastern Province	570	-2%	566
Northern Cape	-	-	150

*Source: Comrades Marathon Organizers

**Note: The provincial names used in this table differs to those of previous years.



Nature and Extent of Comrades Participants



	2011	%	2012	%	2013	%	2014	%
International	1 290	-	1 418	9.9%	1 422	0.28	1 470	3%

The number of international runners has increased steadily over the years. This is good for the future of the event and tourism in the destination.



Nature and Extent of Comrades Participants



International	2012	2013	2014
South Africa	18127	18259	18757
United Kingdom (England, Scotland, Wales, Northern Ireland)	240	284	338
United States	236	216	256
Australia	190	185	206
Brazil	122	132	153
Zimbabwe	85	59	126
Germany	58	47	70
Lesotho	48	13	41
Japan	40	21	35
Canada	35	51	61
Namibia	34	66	40
India	31	38	71
Switzerland	25	5	19
United Arab Emirates	22	8	20
Botswana	20	31	32
Portugal	18	13	15
Swaziland	18	14	35
Israel	11	11	11
Sweden	11	10	26
France	10	13	17
Hong Kong	10	5	10
Ireland	10	17	26
Kenya	10	5	13
Russia	10	8	15
Malawi	9	9	15
Poland	9	4	10
Singapore	9	11	11

There was a significant increase of international participants in 2014. This is the third consecutive increase. This indicated that the event is able to consistently draw international participants and that the CMA's international programme is displaying benefits.



Nature and Extent of Comrades Participants



International	2012	2013	2014
New Zealand	6	14	15
Nigeria	6	-	3
Zambia	6	3	6
Denmark	5	5	7
Belgium	4	4	9
Bermuda	4	1	1
Mozambique	4	-	7
Netherlands	4	27	30
Venezuela	4	-	1
Argentina	3	6	1
Austria	3	3	8
Italy	3	3	2
Malaysia	3	7	11
Mauritius	3	3	3
Philippines	3	1	1
Ukraine	3	-	-
Algeria	2	-	-
Cayman Islands	2	-	-
Mexico	2	-	1
Puerto Rico	2	4	1
Saudi Arabia	2	1	2
Slovenia	2	1	-
Tanzania	2	3	-
Thailand	2	1	-
Angola	1	-	2
Bahrain	1	1	-
Bulgaria	1	-	1



Nature and Extent of Comrades Participants



International	2012	2013	2014
Cameroon	1	-	1
Cyprus	1	-	-
Latvia	1	1	1
Malta	1	1	-
Norway	1	2	3
Oman	1	-	2
Pakistan	1	-	-
Peru	1	1	-
Spain	1	6	3
Tajikistan	1	-	-
Turkey	1	1	-
Uganda	1	1	2
Uruguay	1	-	-
Vietnam	1	-	-
Estonia	-	2	1
Zaire	-	2	-
Gabon	-	1	-
Colombia	-	1	3
Finland	-	1	1
Luxembourg	-	1	2
Chile	-	1	2
Taiwan	-	1	-
Reunion	-	1	-
Albania	-	1	-
Croatia	-	1	1
Ethiopia	-	1	3
Guernsey	-	1	-
Other	-	67	



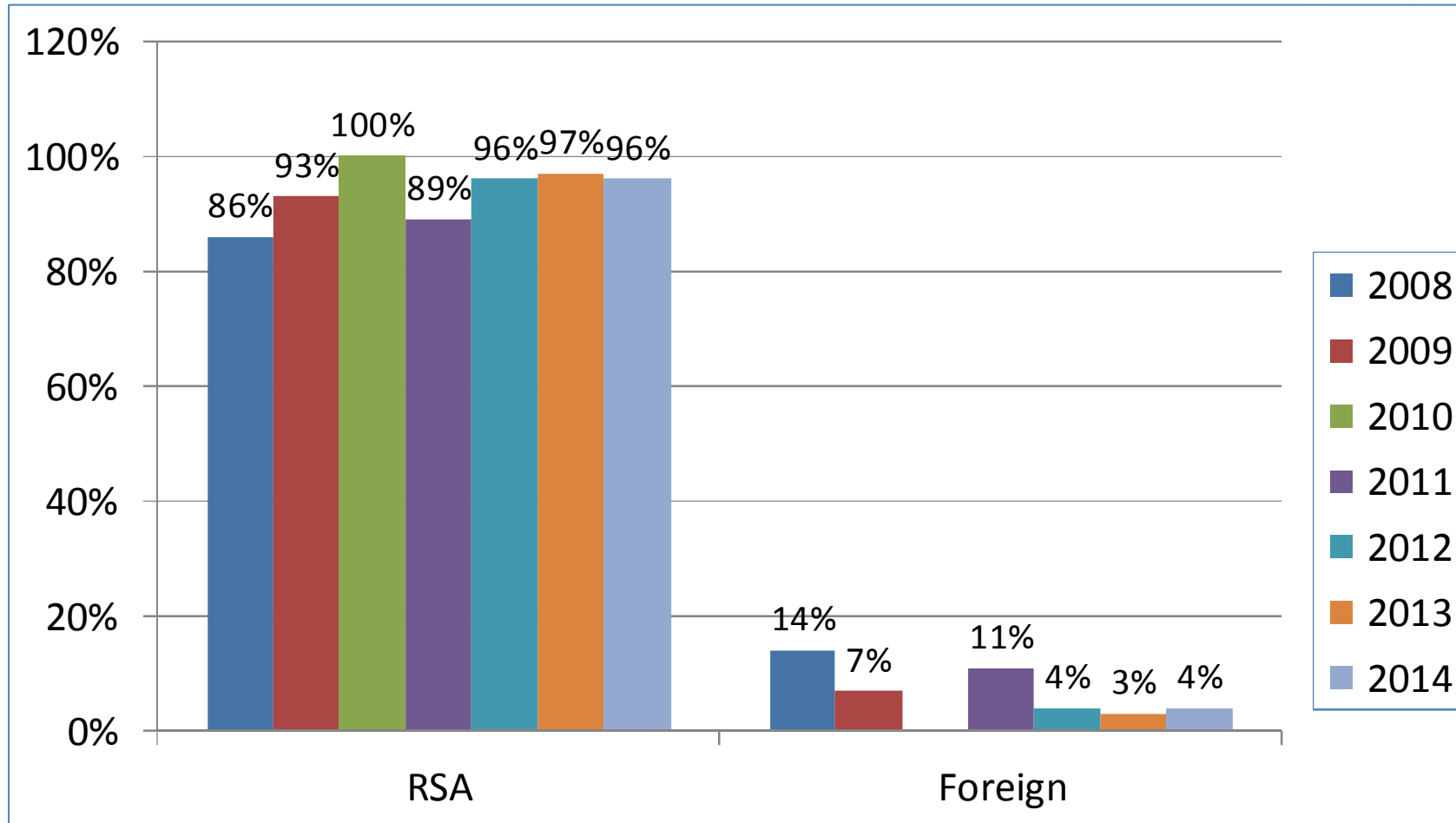
Nature and Extent of Comrades Participants



International	2012	2013	2014
American Samoa	-	-	1
Benin	-	-	1
Brunei	-	-	2
Egypt	-	-	1
Greece	-	-	1
China	-	-	1
Hungary	-	-	2
Indonesia	-	-	1
Virgin Islands	-	-	1
Sierra Leone	-	-	1
Sri Lanka	-	-	1
Madagascar	-	-	1
DRC	-	-	4
Other	-	67	-



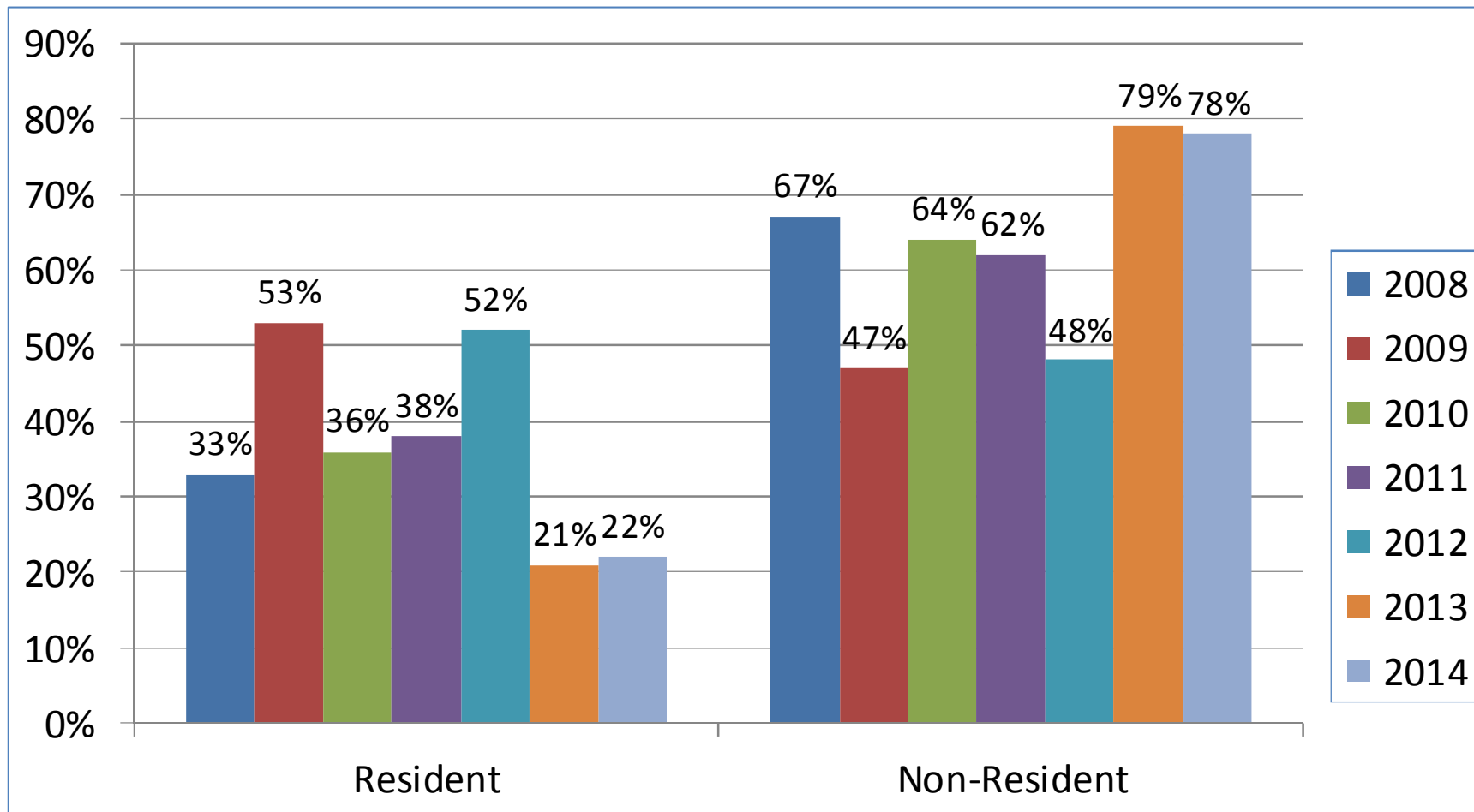
Nature of Spectator Respondents



Most of the respondents interviewed were from South Africa. Slide 6 indicated that there the increase in the number of international participants.



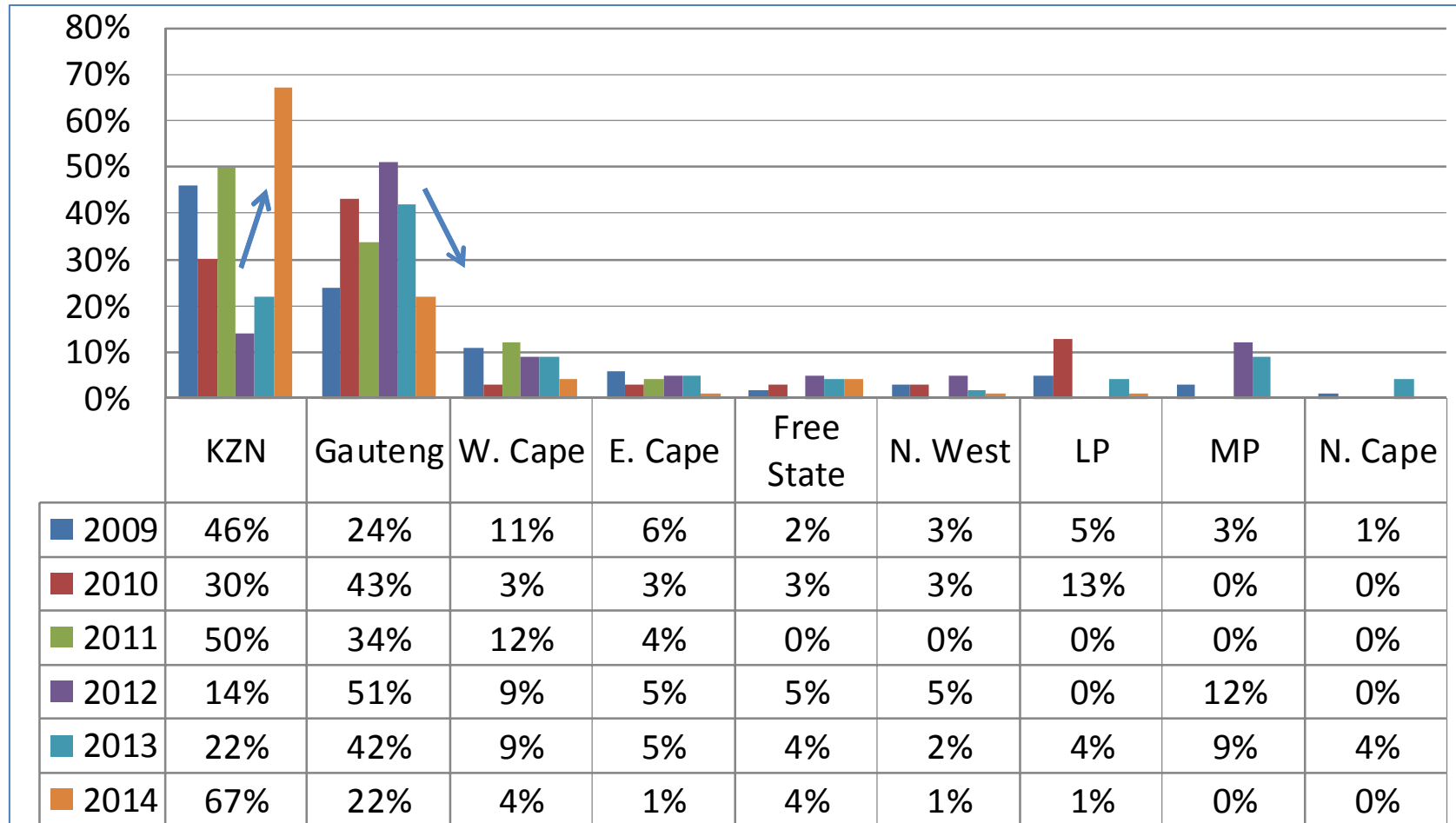
Nature of Spectator Respondents (cont'd)



The non-resident respondents was a significant portion of the spectators. This indicated that the event draws a significant number of visitors to the destination.



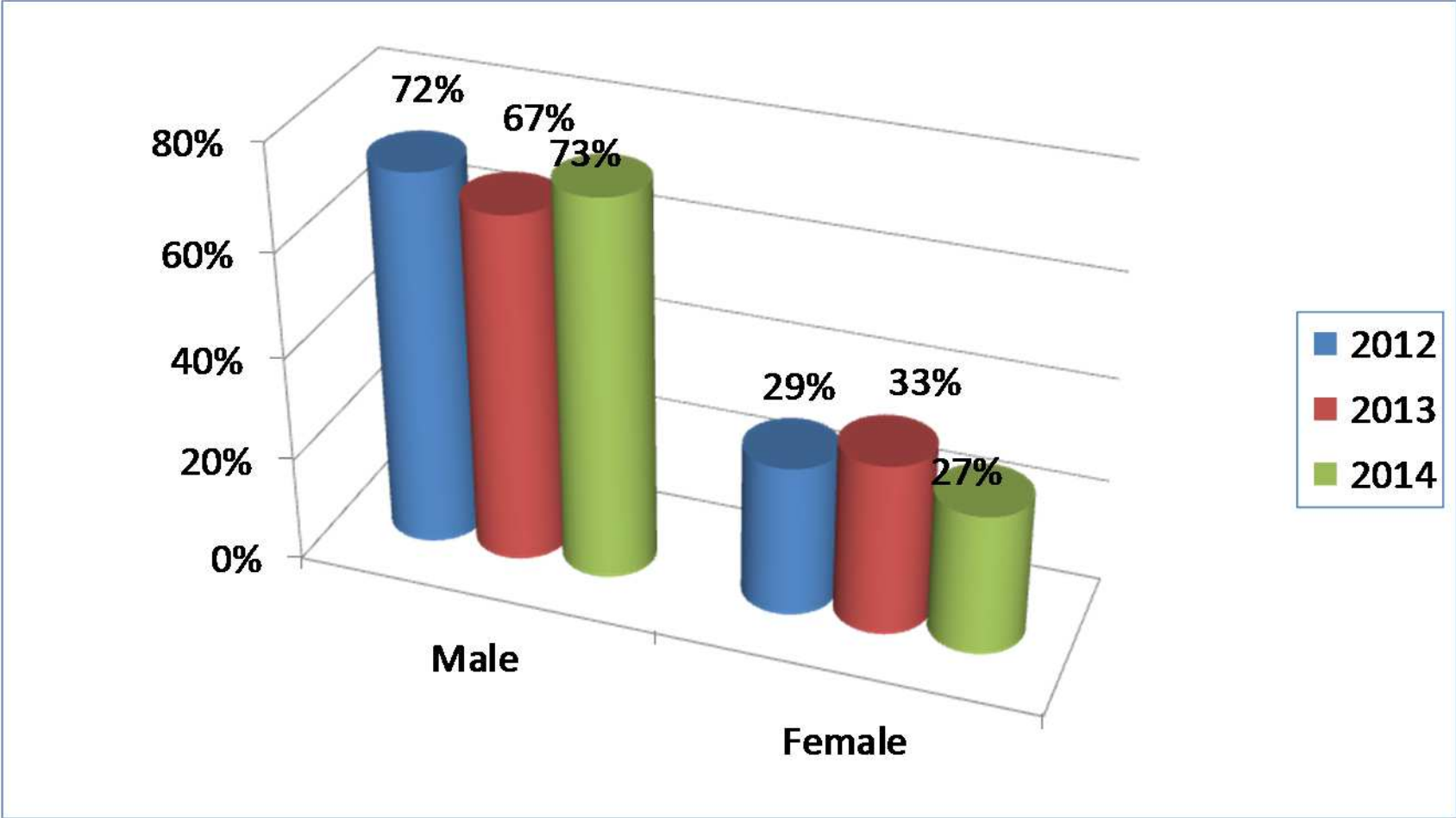
South African Non-Resident Spectators



There was a significant percentage increase in non-resident spectators from KwaZulu-Natal. This reflects the high proportion of participants from KZN. However, it seems a though the Gauteng runners did not attend with friends and family because the entrants from Gauteng was the highest as indicated in slide 5. This is not good from a tourism perspective as these events are used to draw visitors to the destination.



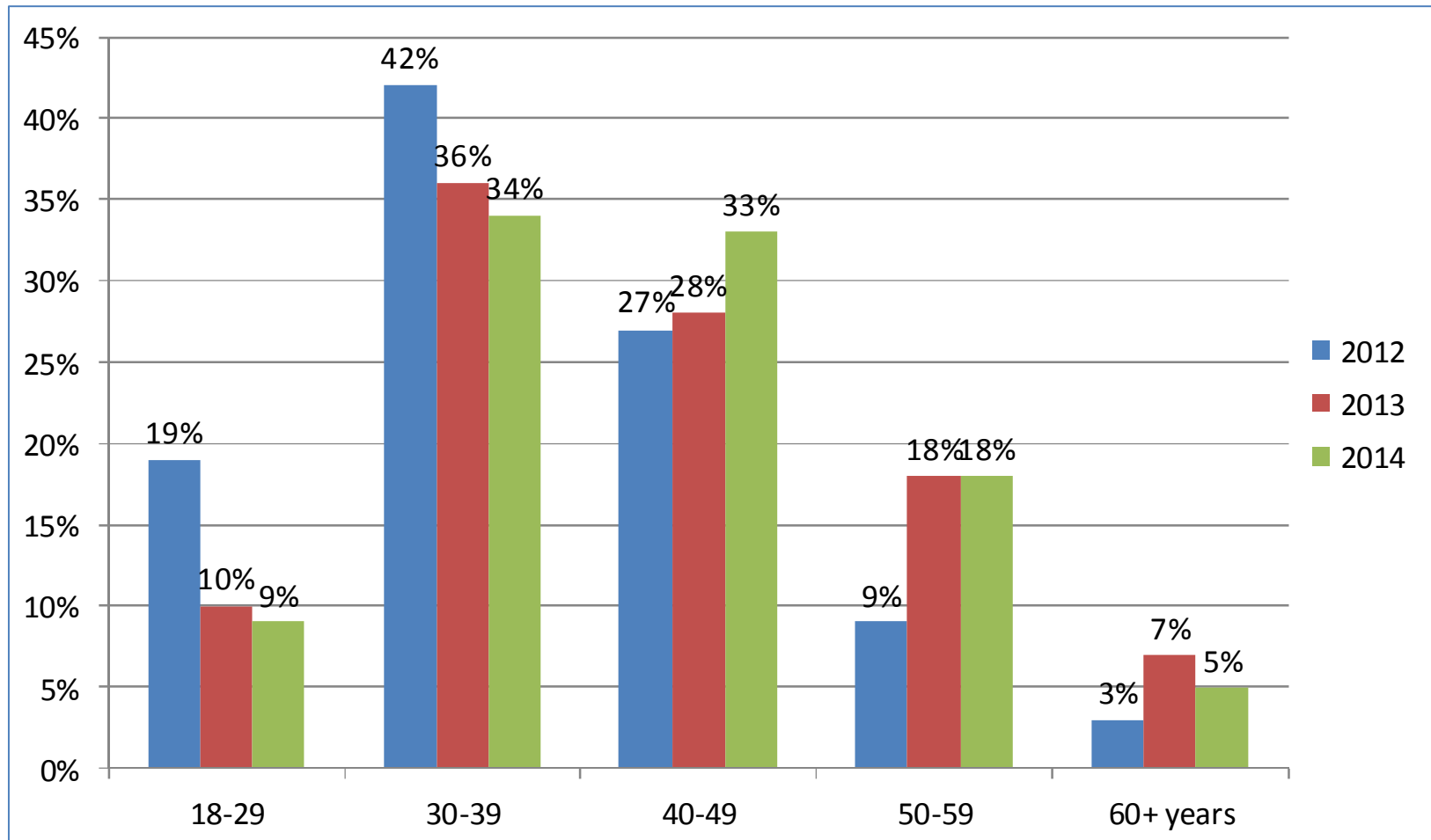
Nature of Respondents: Gender



There was a slight increase in the number of male respondents interviewed



Nature of Respondents: Age



Most of the respondents ages are between 30 and 49. There was a slight increase in the 40-49 age group.



Average Group Size

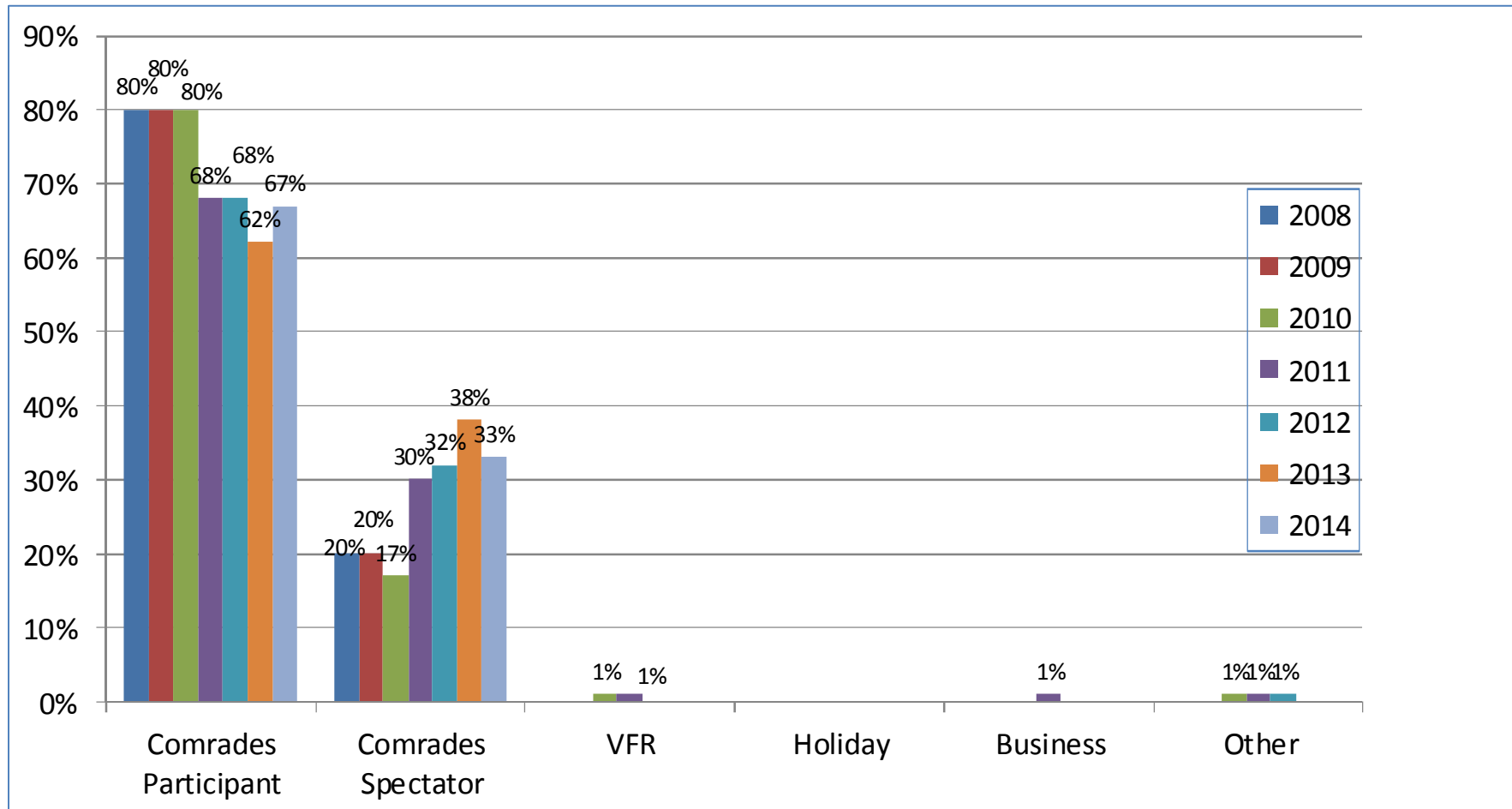


Average Group Size	2012	2013	2014
	2.6	2.5	3.7

The average group has increased significantly in 2014. This indicated that possibly more people were at the event. This was a good indication of the popularity of the event.



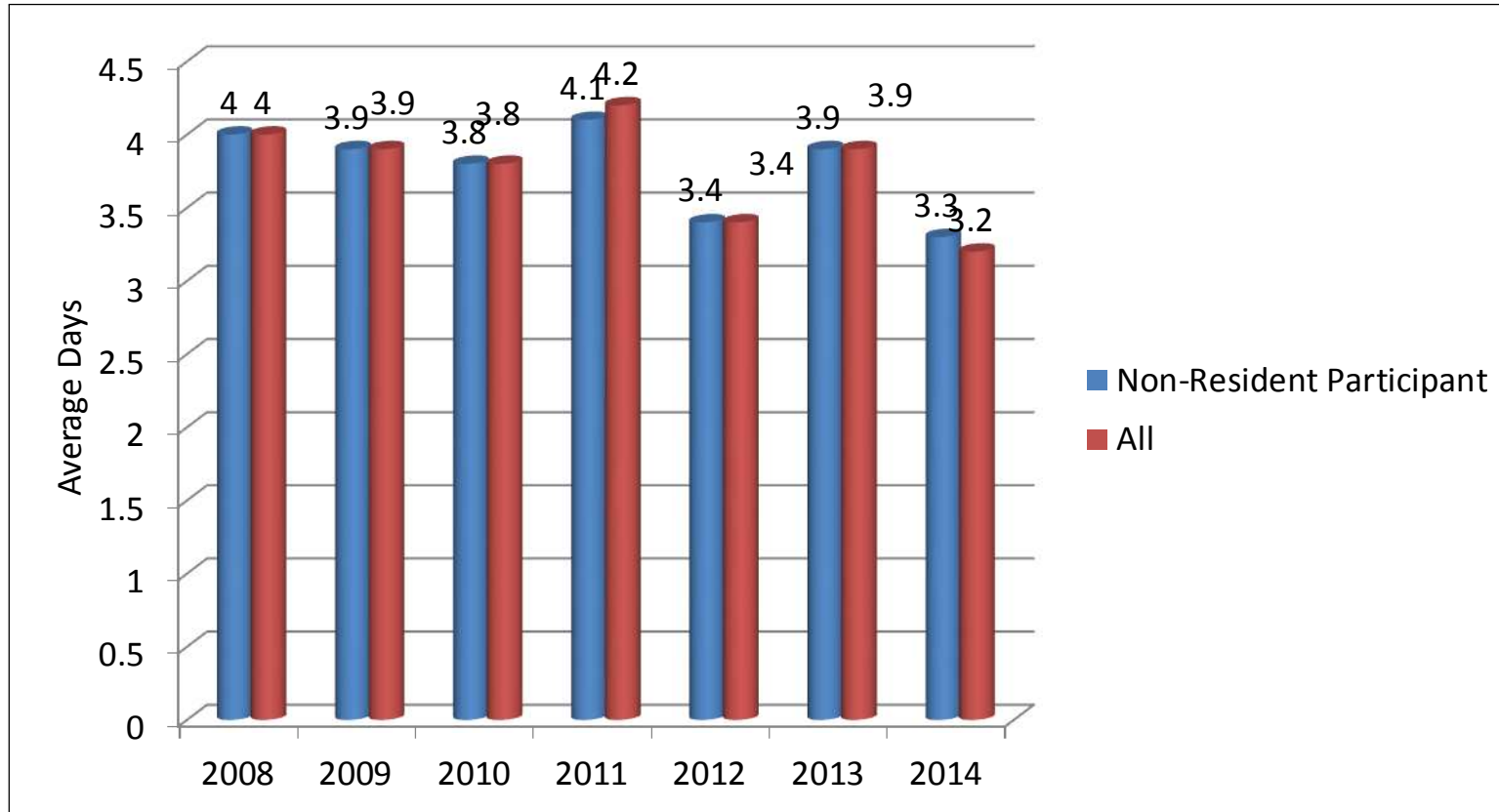
Primary reason for visiting area where event took place



Most respondents, specifically the spectators were in the area for the event and not for any other reason. Thus the Comrades Marathon does have an impact of the decision to visit the area.



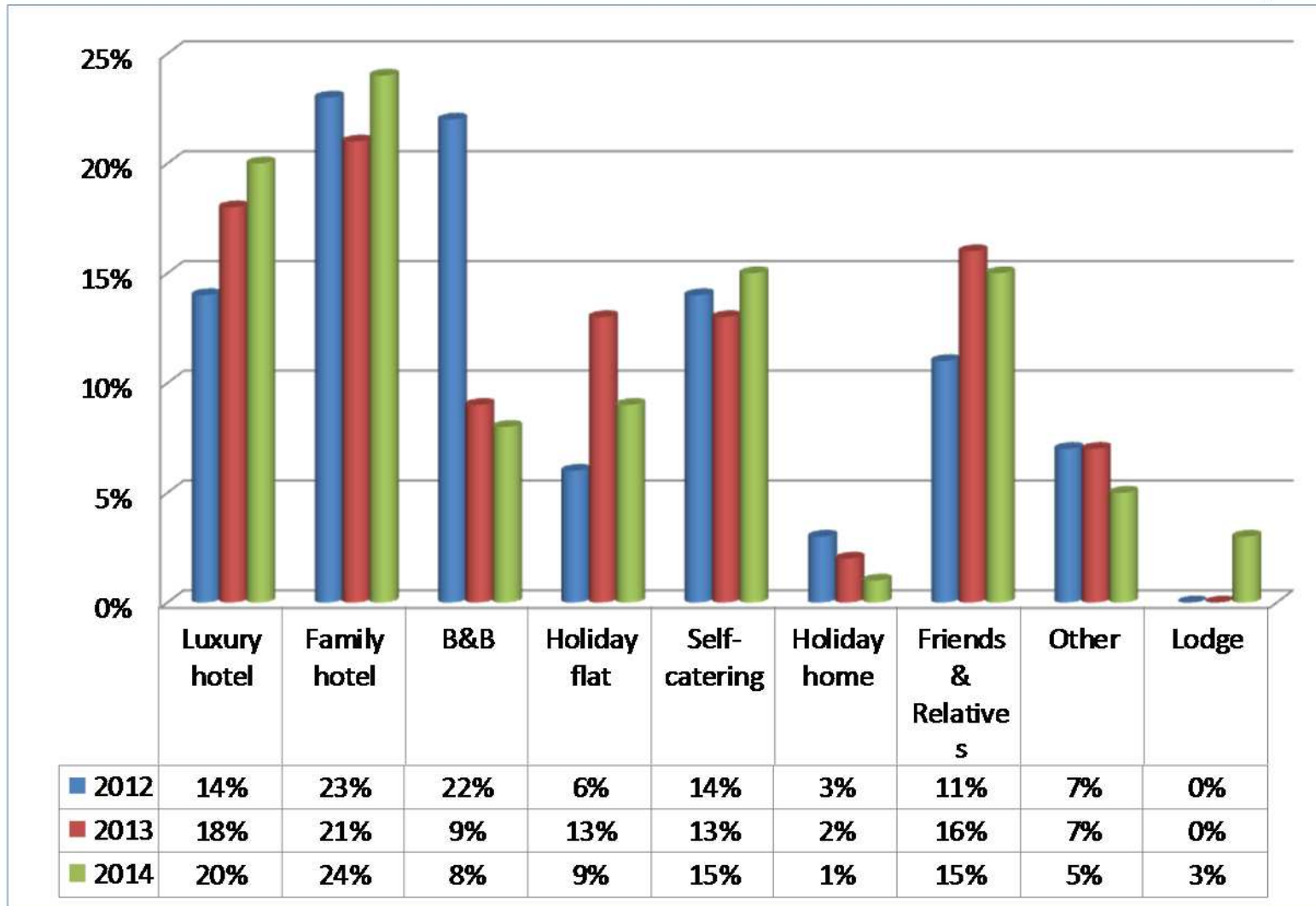
Average Length of Stay



The length of stay of respondents has decreased in 2014. This may be due to the increased use of paid accommodation as noted in slide 19.



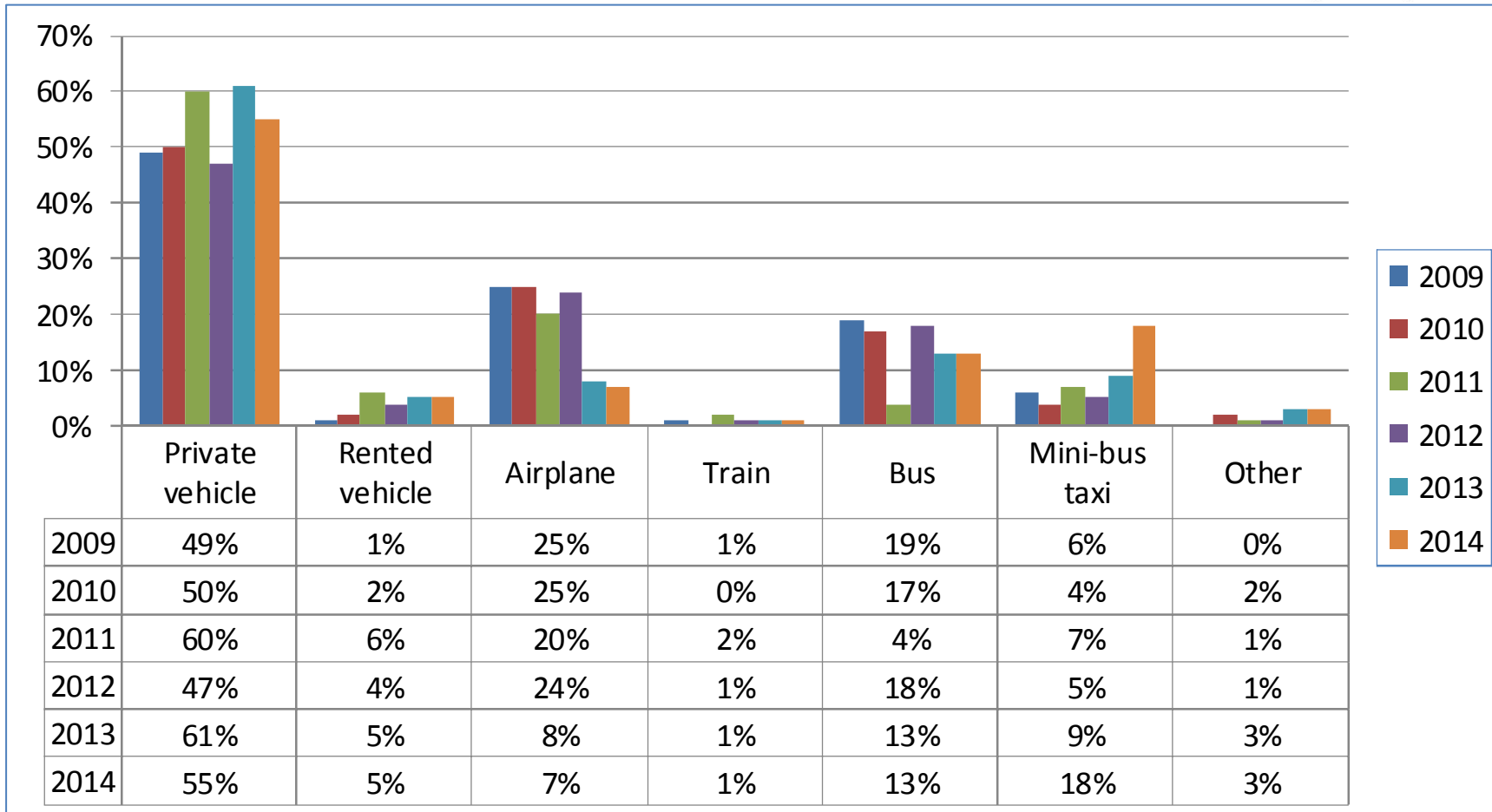
Type of Accommodation: Non-Residents



There seems to be an increase in the use of luxury hotels, family hotels and self-catering establishments. There was a decrease in the use holiday flats. This may have impacted the length of stay as noted in slide 19.



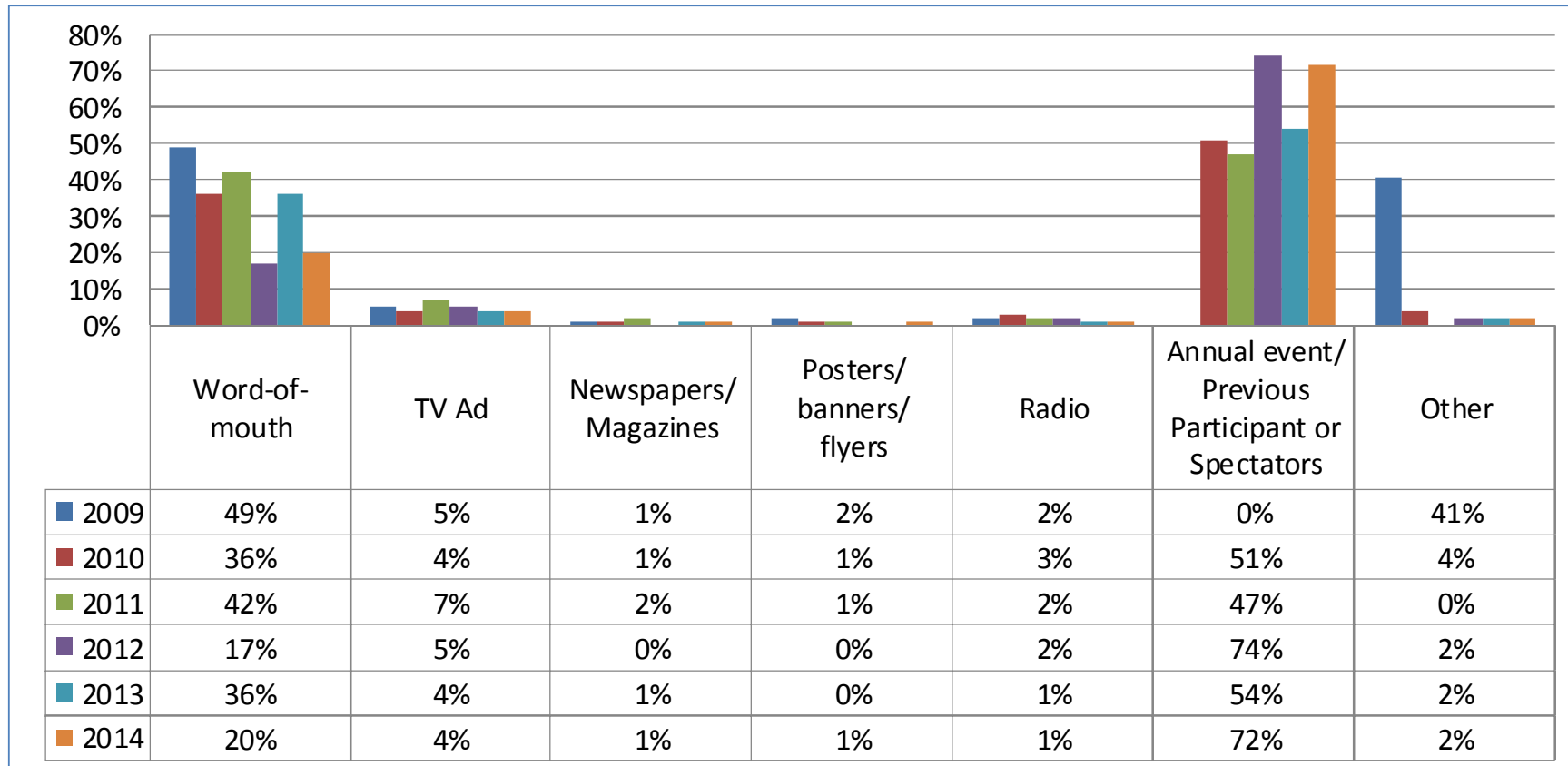
Transport to Event: Non-Residents



There was an increase in the use of mini-bus taxi by respondents. However most respondents still travelled by private vehicle.



Influence to Attend



Most respondents were influenced to return as a result of attending previous Comrades Marathons. This indicated that the event is well organized and provides a good experience.



Influence to Attend (cont'd)



By Media

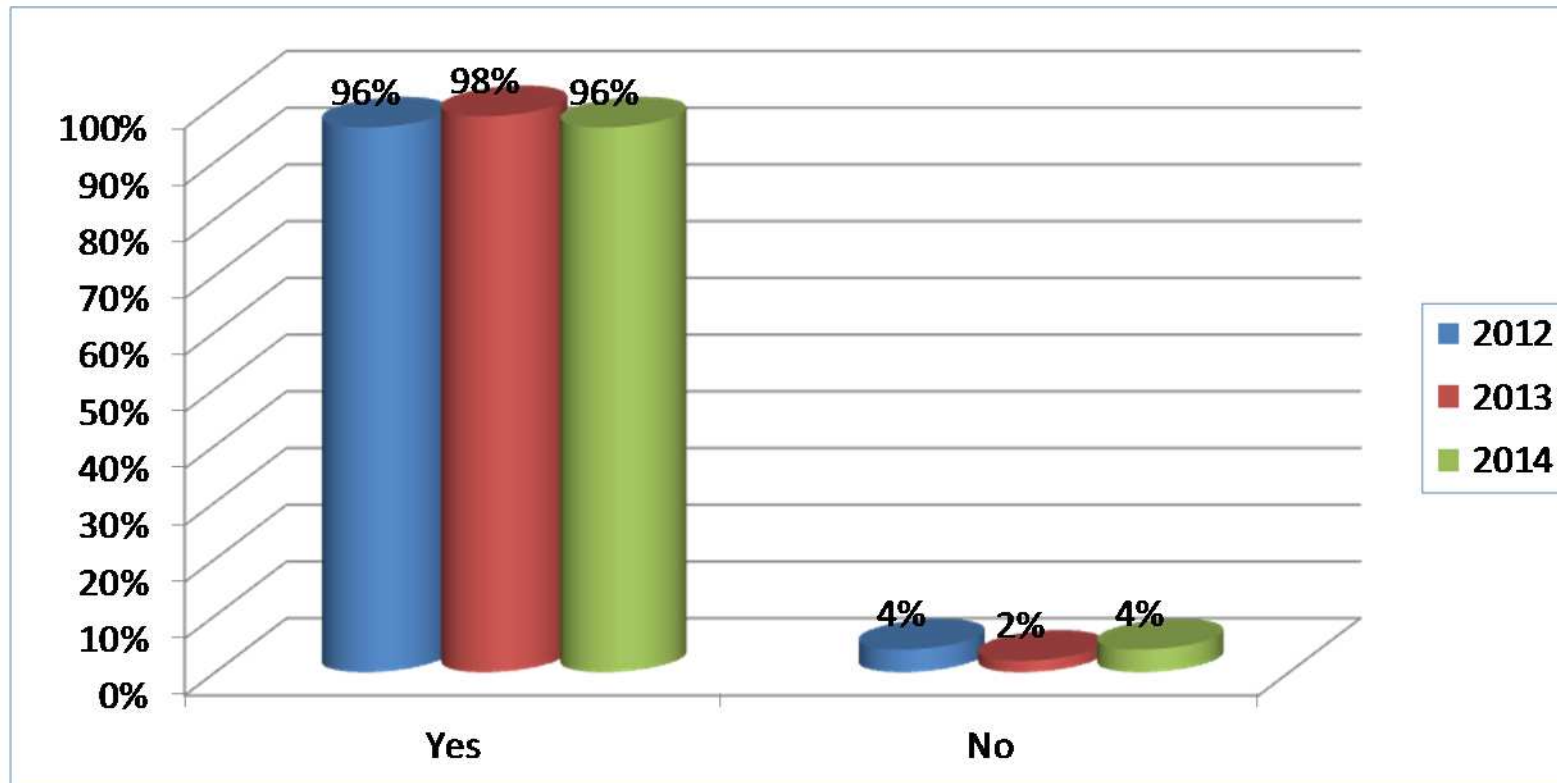
	Newspaper/ Magazine						Poster/Banner/ Flyer						Radio					
Year	'09	'10	'11	'12	'13	'14	'09	'10	'11	'12	'13	'14	'09	'10	'11	'12	'13	'14
Participants %	1	1	2	-	2	-	1	1	1	-	1	1	2	3	1	1	1	-
Spectators %	0	2	-	1	1	2	6	-	2	1	-	1	2	4	3	3	3	2

	TV Ad						Word-of-Mouth						Annual Event/ prev. participant or spectator					
Year	'09	'10	'11	'12	'13	'14	'09	'10	'11	'12	'13	'14	'09	'10	'11	'12	'13	'14
Participants %	7	4	3	1	5	2	45	32	43	9	36	18	31	56	50	88	55	79
Spectators %	20	4	13	11	4	9	54	53	37	31	35	24	22	30	42	50	54	56

This slides indicated that for both the participants and spectators the Comrades being an annual event has influenced them to return.



Information Satisfaction

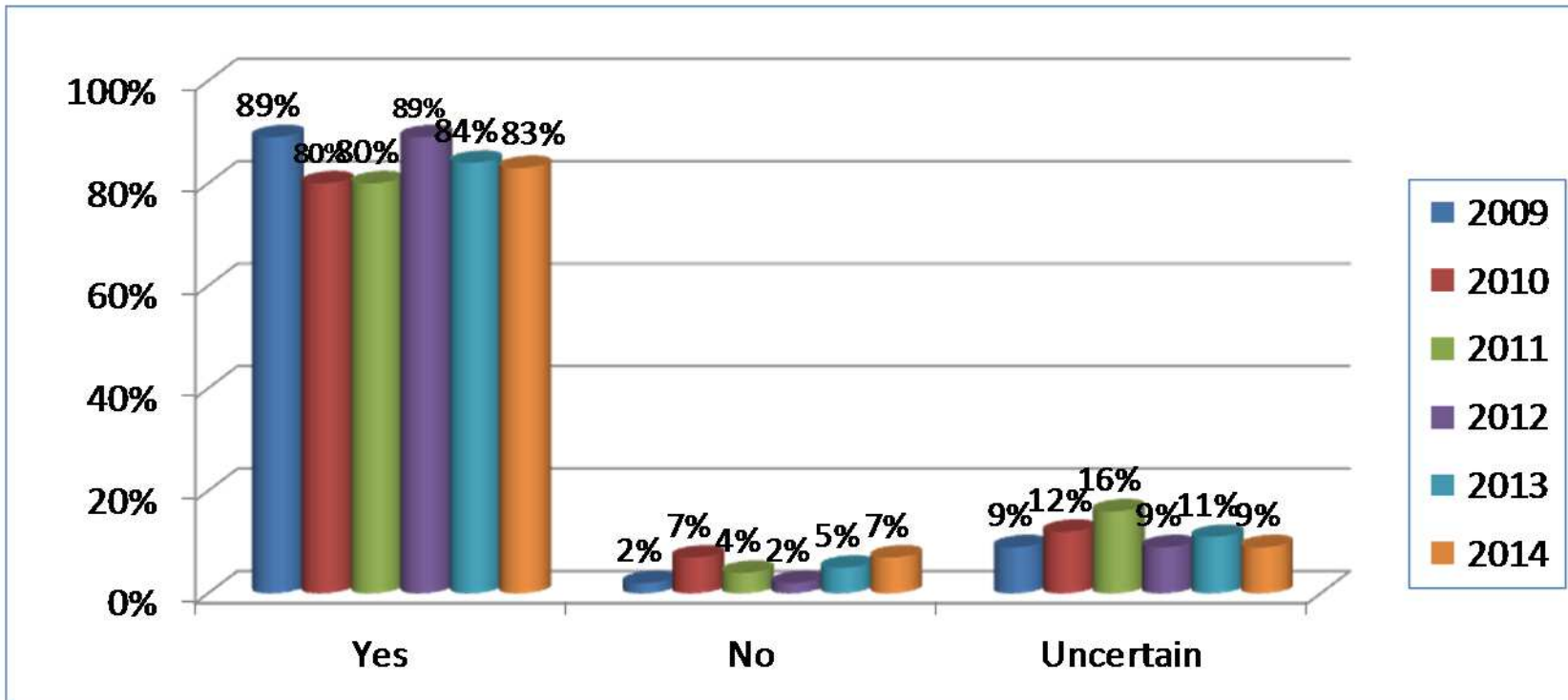


Areas of Dissatisfaction were:

- Parking for spectators
- Administration struggled to find the names
- More marshals



Future Attendance

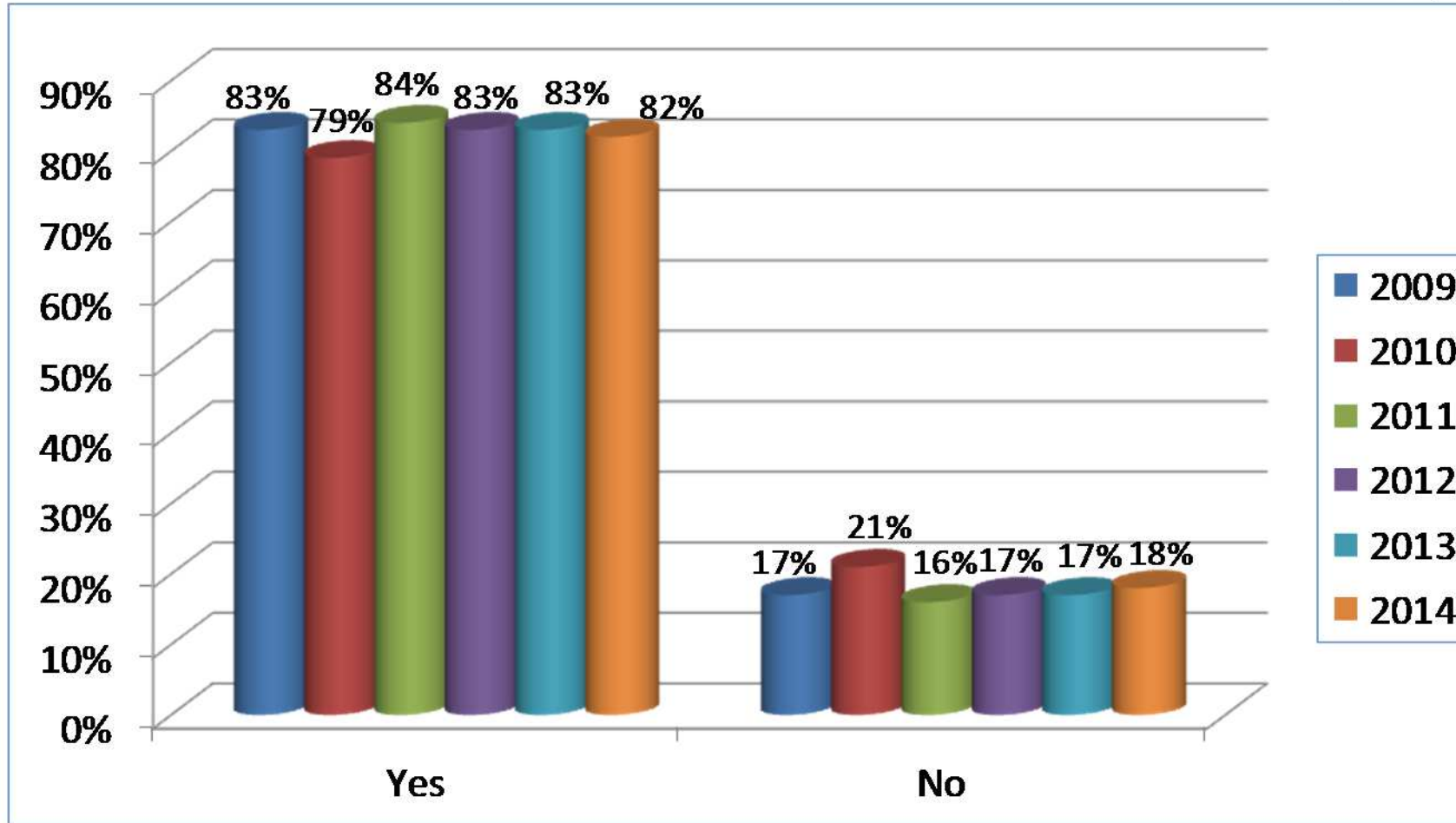


	Participants						Spectators					
Year	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014
Yes	89%	80%	83%	89%	86%	84%	86%	85%	80%	88%	81%	82%
No	3%	9%	4%	1%	6%	6%	2%	-	4%	3%	5%	10%
Uncertain	8%	11%	13%	9%	7%	10%	12%	15%	16%	9%	14%	7%

Most participants and spectators intend to return to the event next year. Comrades is an event where people participate multiple times.



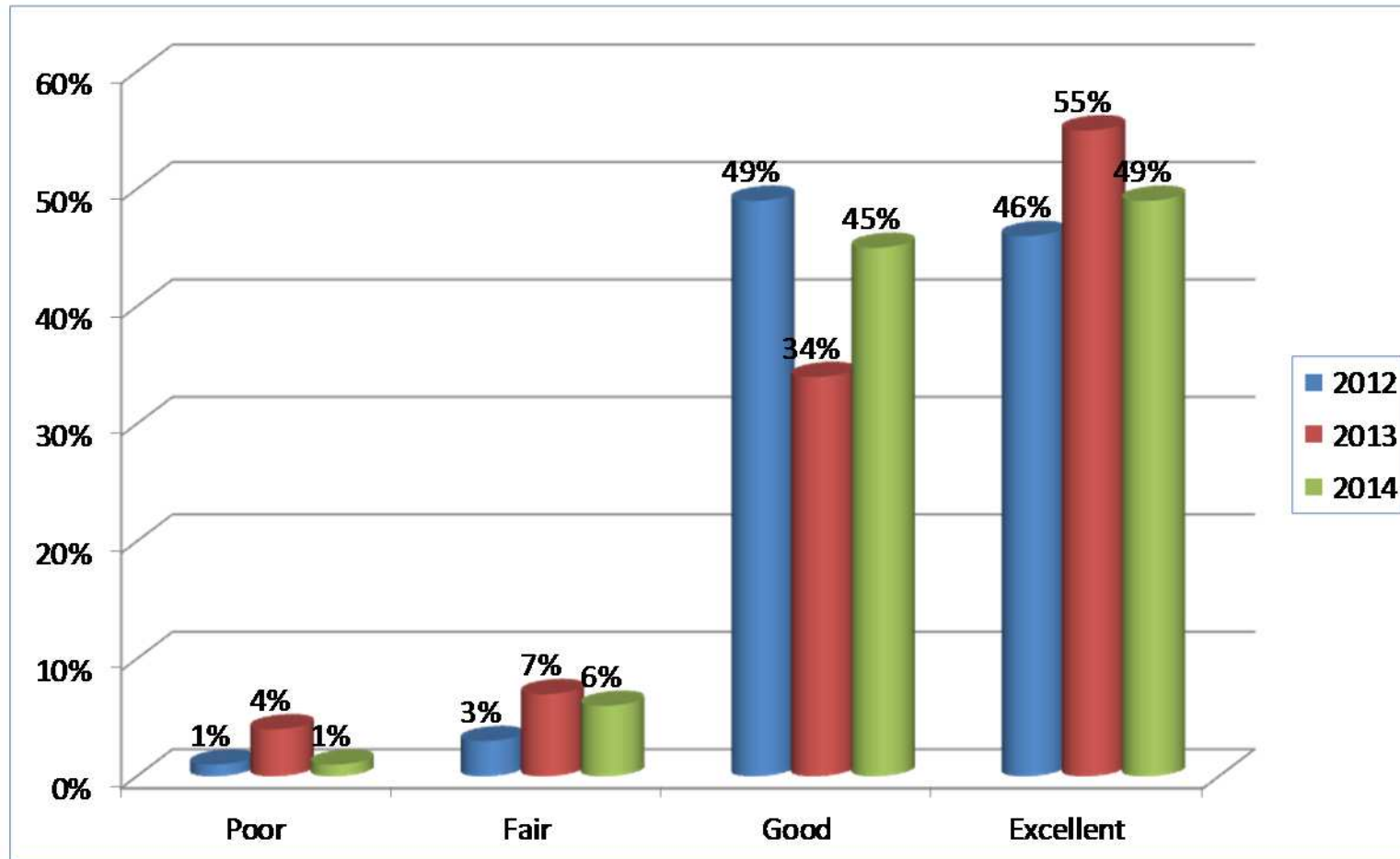
Attended in Previous Years?



Most respondents had attended in previous years. This is an indication that the event is popular and well supported. As indicated in slides 21 and 22, respondents are influenced by their attendance at previous years.



Experience Rating



94% of respondents indicated that they had a 'good' or 'excellent' experience. This is why respondents return to the event and are influenced by their previous attendance at the event.



Marketing Improvement Suggestions

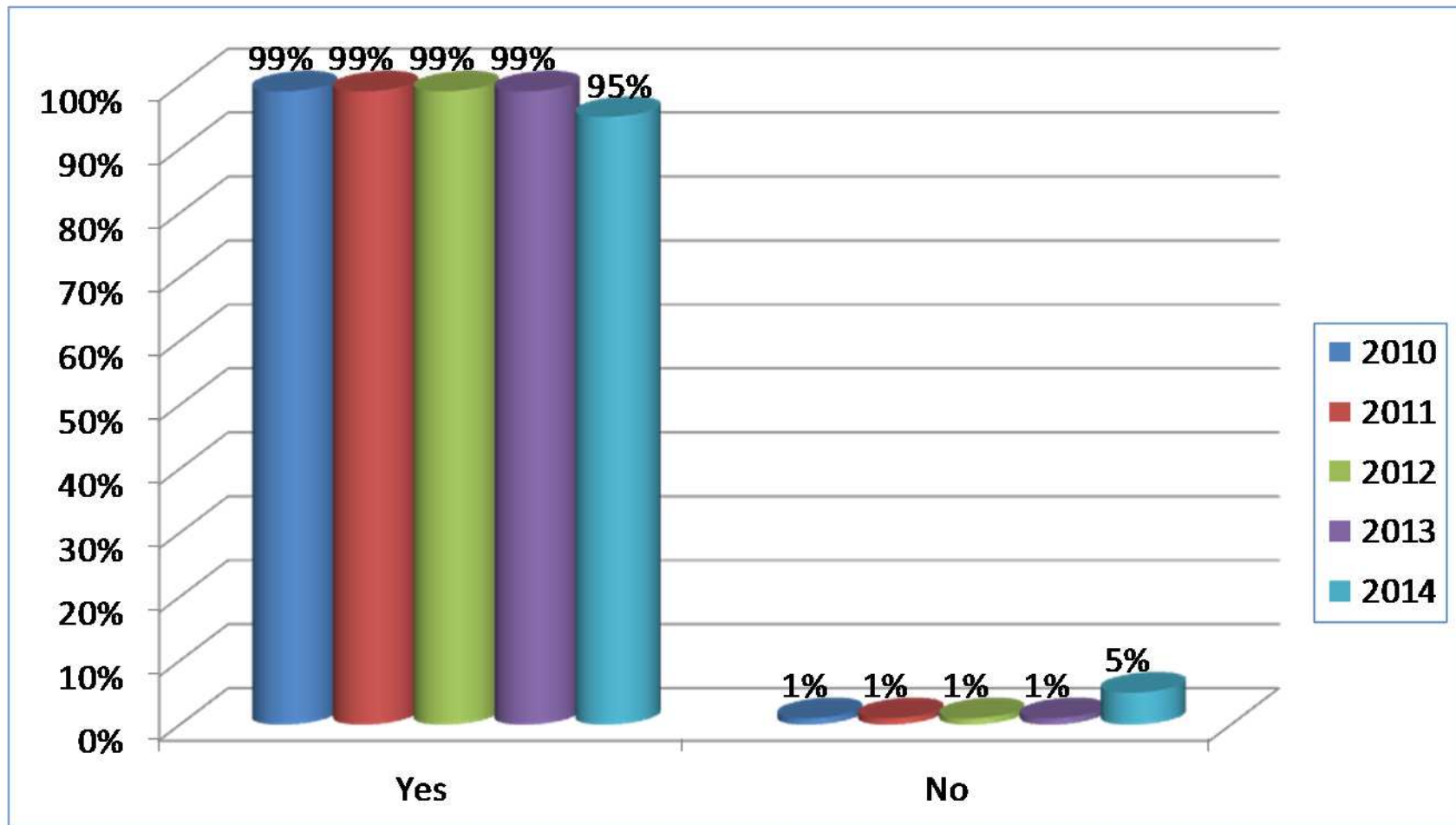


Many respondents were of the view that the event was well marketed. Most respondents indicated that the event is “fine as it is” and “well marketed”. However, the following suggestions were made:

- 1) Advertise early registration more
- 2) Market more on social media and radio
- 3) More advertisements in the print media and TV



Recommend the Event to Family and Friends?



Most of the respondents indicated that they would recommend the event to friends and family. This shows that the event is popular. This information is supported by the high percentage of respondents (slide 25) who attend the event in previous years.



Recommend the Event to Family and Friends? (cont'd)

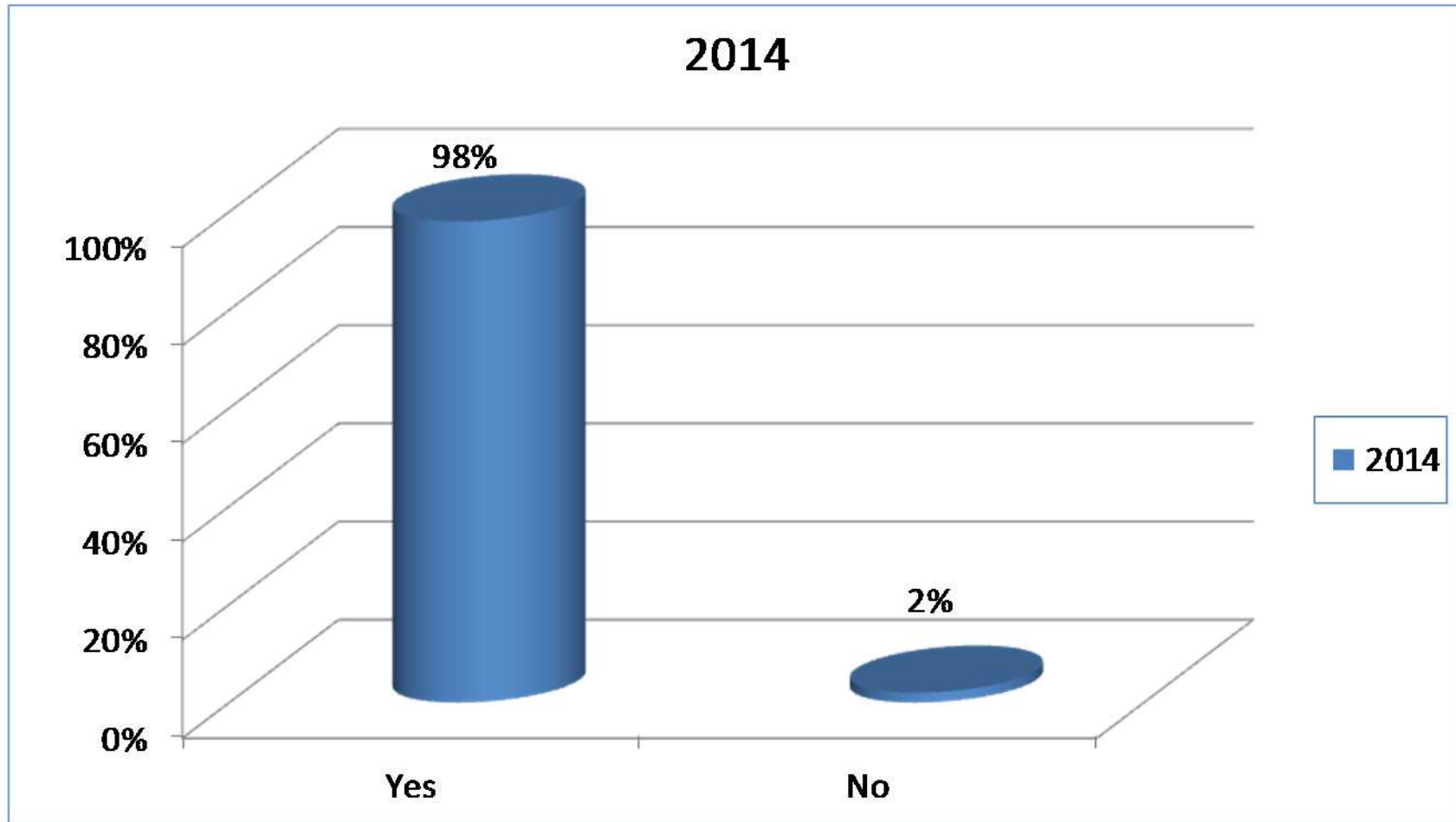


The event was recommended for the following reasons:

- Awesome/unique/world class experience
- The event has a rich history
- Exciting/fantastic/good event
- Great atmosphere
- Good family outing
- Good for the health



Recommend KZN to Family and Friends?



Recommend KZN to Family and Friends? (cont'd)

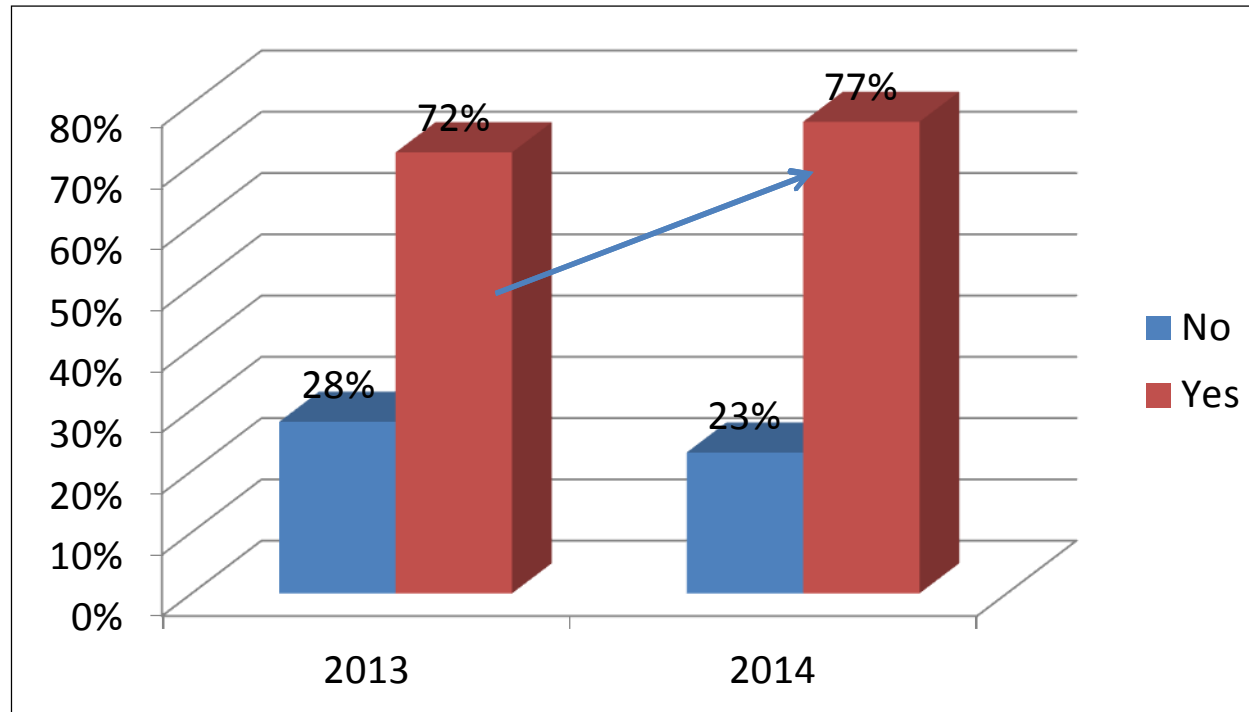


The province was recommended for the following reasons:

- Attractions
- Beach
- Diverse Culture
- Beautiful City
- Beautiful Province
- Friendly People
- Good Weather
- Good Wildlife
- KZN has a lot to offer



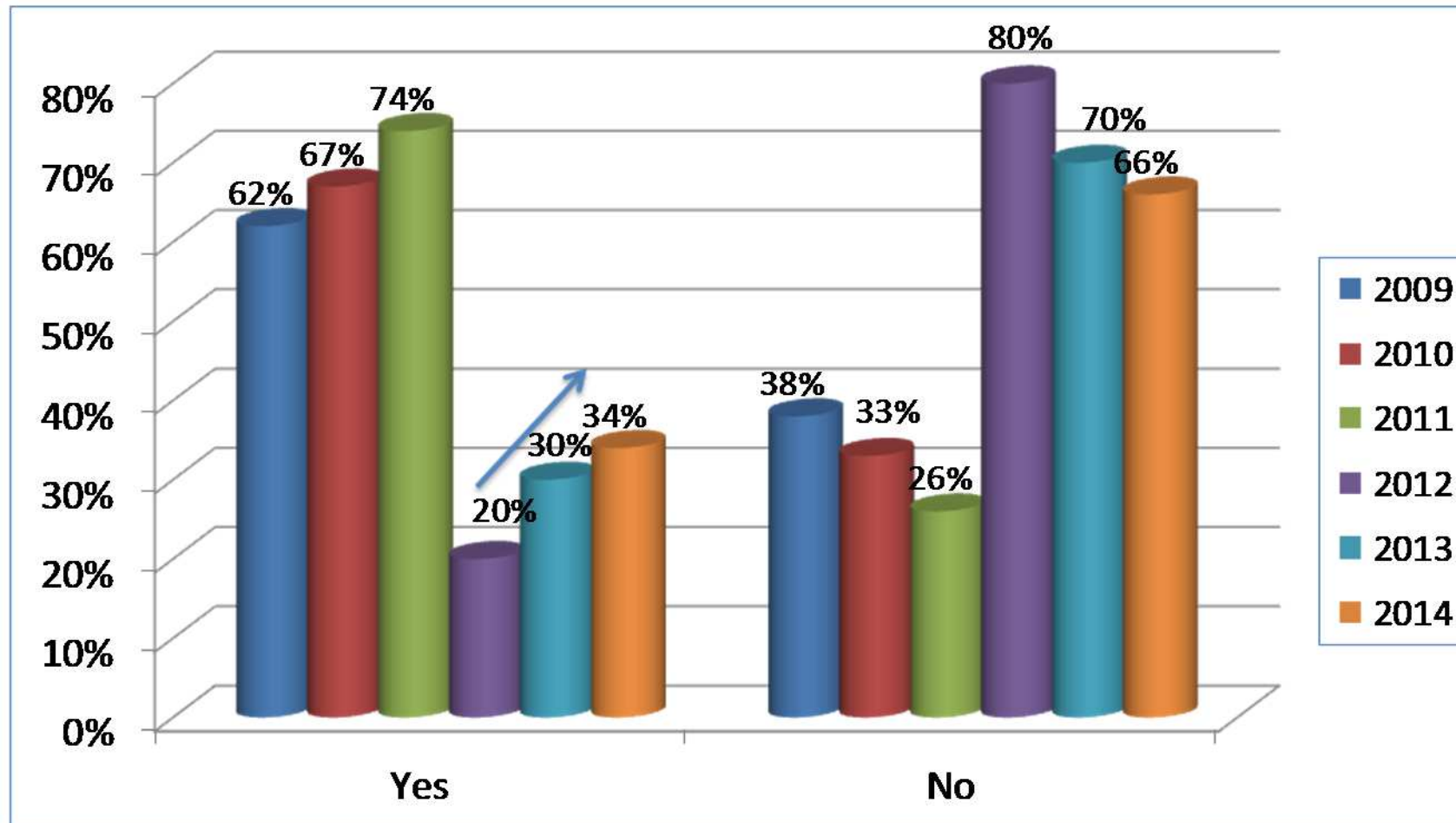
Plan to visit KwaZulu-Natal for a holiday in the next 12 months?



About 77% of the respondents indicated that they would return to KwaZulu-Natal for a holiday in the next 12 months. This is an increase when compared to 2013. This also bodes well for future growth of tourism in the province.



Familiarity with TKZN Slogan

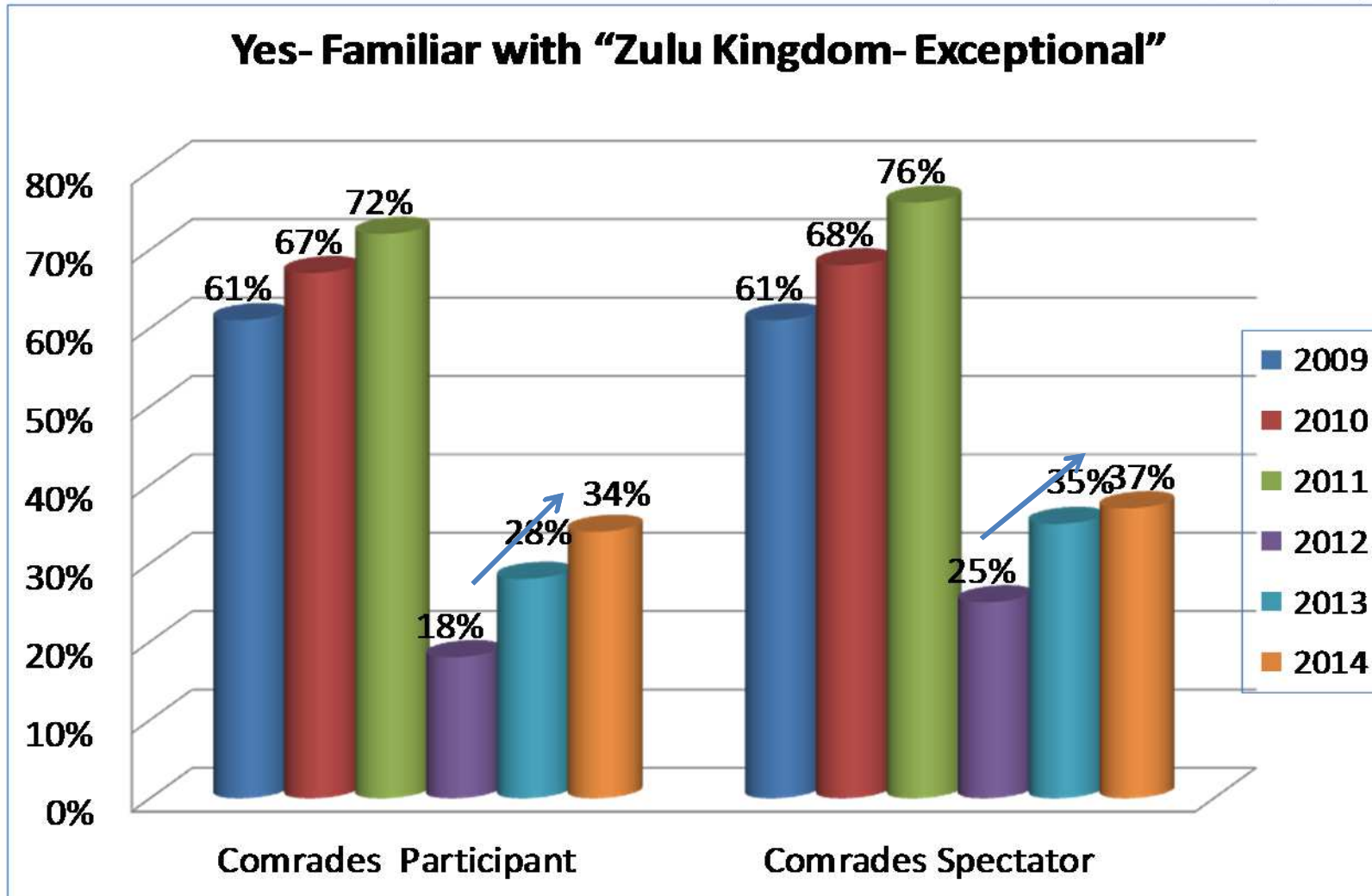


The recognition of the TKZN slogan has improved over the last three years. This indicated that brand is gaining traction with consumers.



Familiarity with TKZN Slogan

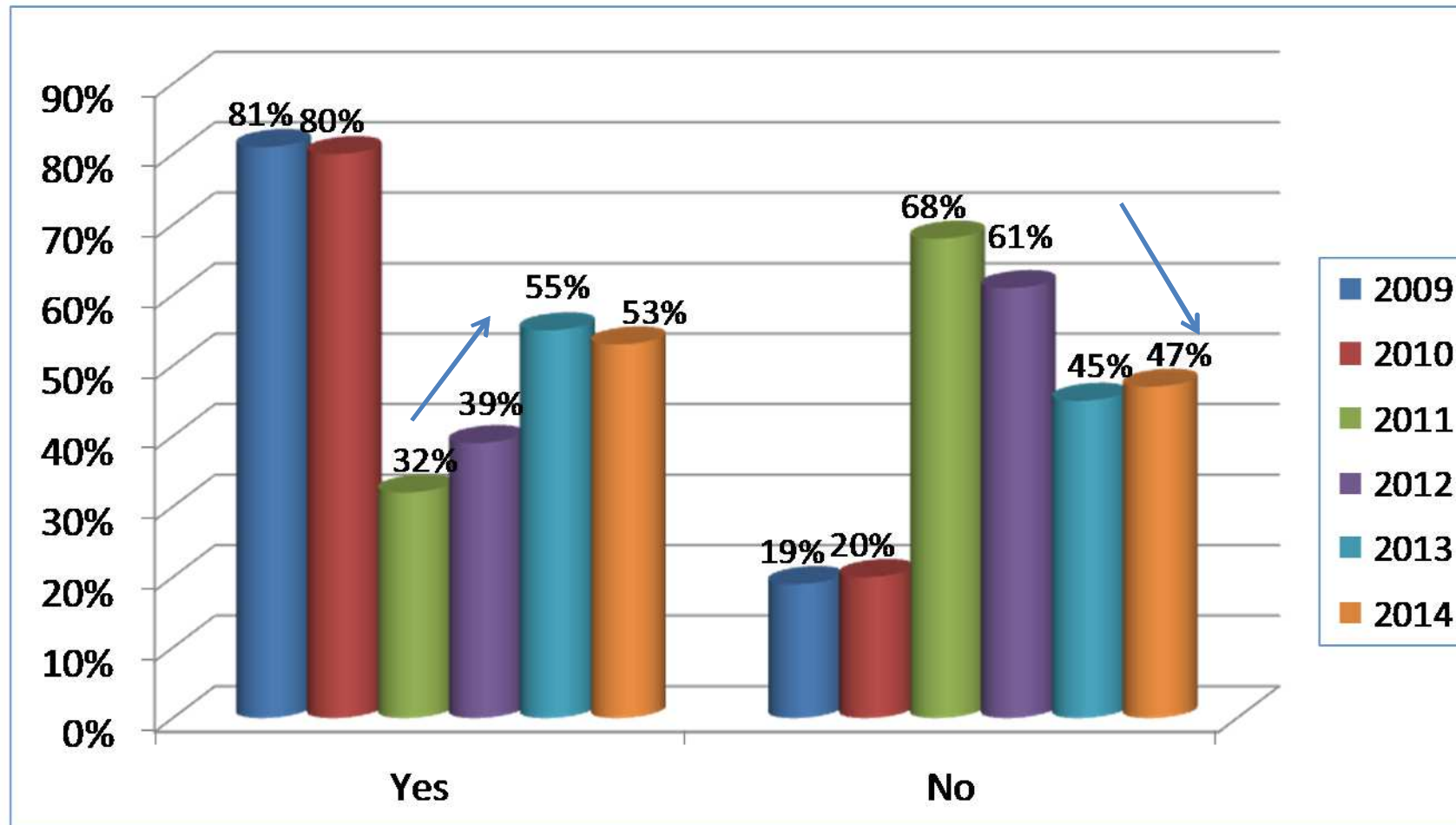
(cont'd)



Both the participants and spectator respondents have shown increased awareness of the TKZN slogan over the past three years. This is an encouraging sign as it has showed that the slogan is becoming popular again after the launch of the new slogan in 2011.



Noted TKZN Logo?



The recognition of the slogan decreased slightly in 2014 when compared to 2013. However, over 50% of the respondents still recognised the logo.



Noted Zulu Kingdom Logo? (cont'd)



	Resident						Visitor					
	2009	2010	2011	2012	2013	2014	2009	2010	2011	2012	2013	2014
Yes	94%	95%	33%	41%	49%	71%	73%	73%	32%	38%	56%	48%
No	6%	5%	67%	59%	51%	29%	27%	27%	68%	62%	44%	52%

There was a decline in the visitor respondents who recognized the logo. This is concerning as it is important that visitors are familiar with TKZN's branding. However, there was a significant increase in the recognition of the logo by resident respondents. This is encouraging as residents can assist in promoting the brand



Where Zulu Kingdom Logo Noted



	2010	2011	2012	2013	2014
Billboard/ posters/banners	11%	14%	13%	7%	5%
Brochures/pamphlets/flyers	8%	8%	6%	4%	1%
Magazines	6%	15% (incl. newspapers)	11%	9%	3%
Newspapers	3%	-	4%	3%	7%
Clothing	12%	7%	-	1%	2%
Tourism Information Office	5%	5%	12%	1%	7%
Internet	8%	15%	7%	8%	10%
Television	14%	14%	10%	23%	17%
Airport	8%	12%	4%	7%	12%
uShaka Marine	11%	-	4%	4%	9%
Durban	3%	-	4%	4%	6%
Comrades Expo/Marathon	2%	4%	8%	13%	10%
Casino	1%	-	-	1%	1%
Indaba	-	7%	-	1%	1%
Various Events	-	-	2%	-	1%
Advertisements	-	-	4%	2%	1%
Other	8%	-	12%	12%	5%
Beach	-	-	-	-	1%

The TKZN logo was mostly noted at the Comrades expo, television, at the airport and on the internet. The wide variety are places where the logo was noted is encouraging as this indicated that TKZN is doing a good job in using these various platforms.



Average Spend



	2008	2009	2010	2011	2012	2013	2014
Average total spend	R6 242	R2 271	R2 606	R3 850	R2 253	R 4 443	R4 218
Non-residents participants	R8 598	R3 107	R3 658	R5 471	R3 224	R5 399	R5 300
Resident participants	R529	R826	R645	R1 177	R334	R535	R1 038
Non - resident spectators	R3 297	R2 750	R2 998	R3 930	R3 670	R5 251	R4 818

The average spend decreased in 2014. Also the non-resident participants and spectators also showed a decrease in spending. This may be attributed to the decline in the average length of stay. However, there was an increase spend by resident participants, which is encouraging. Local residents should be encouraged to spend more at event because they do not have other expenses such as accommodation and transport.



Estimated Economic Impact: Resident and Non-resident Participants



Non-resident participants

- N = 12 478 (14 620* – 2 142)
- Mean: R5 300
- Estimated direct spend **excluding** Std Error = R66 135 895
- Estimated direct spend of at least R52 660 970 and as much as R79 610 820

Resident participants

- N = 2 142
- Mean: R1 038
- Estimated direct spend **excluding** Std Error = R2 224 681
- Estimated direct spend of at least R472 513 and as much as R3 976 849

*This is based on 14,336 runners who started the race and not 19,907 who registered.



Estimated Economic Impact: Non-Resident Spectators (cont'd)



Non-resident spectators

- N = 33 577 (55 000 – 21 422 local spectators)
- Mean: R4 818
- Estimated direct spend excluding Std error = R161 784 059
- Estimated direct spend taking Std error of mean into account: At least R99 075 583 and as much as R224 485 678.

Note: It is estimated that 55 000 spectators were at the finish.



Estimated Economic Impact: Participants and Non-Resident Spectators



	2011	2012	2013	2014
Non-resident participants	Low: R41 815 119 Middle: R50 460 308 High: R59 105 497	Low: R27 619 498 Middle: R33 380 293 High: R39 141 087	Low: R48 486 573 Middle: R66 569 318 High: R86 652 052	Low: R55 665 970 Middle: R66 135 895 High: R79 610 820
Resident participants	Low: R2 906 324 Middle: R4 031 714 High: R5 157 105	Low: R813 625 Middle: R1 047 853 High: R1 282 081	Low: R457 049 Middle: R1 076 876 High: R1 696 702	Low: R472 513 Middle: R2 224 681 High: R3 976 849
Non-resident spectators	Low: R97 798 537 Middle: R143 854 572 High: R189 910 607	Low: R48 414 612 Middle: R62 670 740 High: R76 926 867	Low: R97 082 873 Middle: R126 888 658 High: R156 69 461	Low: R99 075 583 Middle: R161 784 059 High: R224 485 687
Direct spend	*At least R139 613 657 As much as R249 016 104	*At least R76 034 111 As much as R116 067 953	*At least R143 596 447 As much as R243 346 515	*At least R151 736 554 As much as R304 096 498
Total spend	*At least R198 251 393 As much as R353 602 868	*At least R107 968 437 As much as R164 816 494	**At least R203 868 615 As much as R345 552 051	**At least R215 465 906 As much as R431 817 028
			***At least R287 138 447 As much as R486 693 030	*** A least R303 473 108 As much as R608 192 997

*

Resident participants spend was not included in the direct and total spend calculations

*Low estimate taking into account a 95% standard error

Medium estimate not taking into account a 95% standard error

High estimate taking into account a 95% standard error

** A multiplier of 1.42 was used as per previous studies.

***A multiplier of 2.0 was used to more accurately estimate the broader economic impacts.

Beyond Tourism Impacts



	2013	2014
Income from Entry Fees	R6.7mn was received from entry fees. The leakage was estimated to be 10%. This means that just over R6mn was spent in the province.	R8.261.496.00 for local International and Rest of Africa athletes
Total Race Expenses	R23.3mn was used to cover the race expenses, which included the cost of the venue hire, administration, prize money, KZNA race levy, VIPs, medals, underprivileged runners and foreign competitors hospitality.	R22,144,829 was used to cover the race expenses, which included the cost of the venue hire, administration, prize money, KZNA race levy, VIPs, medals, underprivileged runners and foreign competitors hospitality.
Jobs created	12 temporary jobs 5 Interns gained skills in sports and events management, media, administration.	17 Permanent Staff. 9 temporary jobs 10 Interns gained skills in sports and events management, media, administration.
Environment/Route/Logistics	Waste from the road was recycled by Enviroserve and the Wildlands Conservations Trust. Local communities produced the Amabeadibeadu Charity products.	Waste from the road was recycled by Durban Solid Waste and the Wildlands Conservations Trust. Local communities produced the Amabeadibeadu Charity products. 250 Community Marshals were used to ensure safe passage of runners through the "Valley of 1000 Hills" part of the route. Taxi Association of "The Valley" used to transport runners from the route (who wish to retire) to the finish – 50 taxis employed.

Source: Comrades Marathon Association

Problems Experienced



2012	2013	2014
Difficulty in finding the stadium	Administration struggled to find their names	More marshals
Lack of signage	Did not receive the sms	More in goodie bags
	More in goodie bags	Administration problems in processing the registration of participants.
	More parking for spectators	



Marketing Improvement Suggestions



2012	2013	2014
Advertise on TV/Radio	More internet advertising with more information	Advertise early
Advertise more on social media	Links to accommodation website	Market more on social media and radio
Improve the comrades website	Advertise on TV	More TV advertisements
Advertise the event early, e.g. months in advance	More emails leading up to the race.	
Conduct road shows		
Hold competitions for the spectators within the stadium to attract people		
Live entertainment after the event		
Market the event on other TV channels e.g. DSTV		
Market the event in schools		
More posters/billboards to be put around the CBD		



Findings



1. Limpopo saw a 18% increase in the number of entrants. There was a increases from many other South African regions. The 2014 event also saw a slight increase in entries from overseas which could suggest that the work that is undertaken to attract such markets, is paying dividends.
2. In 2014 there were 78% non-resident spectator respondents. This may indicate that most of the spectators at the finish of the race were not locals.
3. There was a significant increase in the proportion of non-resident spectators who were from KZN in 2014 to 67% from 22% in 2013. It is encouraging that more KZN residents travelled within the province, as this will increase tourism spend in the province.
4. The Comrades Marathon attracts people from different age groups. The 2014 race was mainly attended by people in the age groups 30-39 and 40-49. There was a slight increase in the age group 40-49. While the 30-39 age was the largest segment, it showed a decline for the second straight year.
5. All respondents were in the area specifically for the Comrades Marathon. This suggests that the Comrades Marathon served as a draw card for people to be in the area.
6. The average group size was 3.7. This represented a significant increase over 2013 which was 2.5.



Findings (cont'd)



7. It appears that the average length of stay decreased from an average of 3.9 nights in 2013 with many people staying for a shorter period of 3.2 nights in 2014.
8. More respondents stayed in luxury hotels (20%) and family hotels (24%) in 2014. Stays in B&Bs continued to decrease among those who were interviewed. There was a slight increase in the number who stayed with friends and relatives. This may be as a result of the increase in group size, where family rooms in hotels offer value for money.
9. There are different factors which may influence respondents to attend a particular event. In this case, the majority of respondents were influenced by the fact that they had participated or attended the event previously. Word-of-mouth also played a significant role in this regard. The marketing media did not play a major role.
10. 96% of the respondents were satisfied with information that was provided through various media mentioned above. Areas of dissatisfaction related to people wanting more in the goodie bags, various administrative problems and more marshals.
11. It appears that most participants and spectators were satisfied with the event. This was shown by the level of future attendance as 84% and 82% of participants and spectators respectively indicated that they would attend the event in future.
12. Only 18% of respondents were attending for the first time suggesting that in spite of the event being old it is still able to attract new people.
13. About 94% of respondents had 'good' or 'excellent' experience at the event. This may have contributed to the degree of future attendance that was expressed as indicated in point 11 above.

Findings (cont'd)



14. Even though the traditional marketing media did not play a major role in influencing the respondents to attend the event, they were still of the view that the event should be marketed in on radio/TV. They also made other suggestions such as:
 - Advertise early
 - Market more on social media and radio
 - More TV advertisements
15. The majority of respondents (95%) said they would recommend the event to family and friends. They cited the following reasons for doing so:
 - Awesome, unique, world class experience
 - The event has a rich history
 - Exciting, fantastic
 - Great atmosphere
 - Good family outing
 - Good for the health
16. About 77% of the respondents indicated that they would return to KwaZulu-Natal for a holiday in the next 12 months.



Findings (cont'd)



17. Only 34% of the respondents were familiar with the Zulu Kingdom slogan. This was a small increase from 30% in 2013. The new slogan was introduced in 2011. This increase indicates that the TKZN slogan is slowly gaining recognition in the public arena.
18. There were also slight increase in the levels of recognition of the slogan by Comrades, participants (34%) and spectators (37%), when compared to 2013.
19. The noting of the logo was 53% in 2014 from a low noting of 39% in 2012. This is a significant improvement which is the result of continued branding exercises by TKZN.
20. About 98% of the respondents indicated that they would recommend KZN to their friends and family. This bodes well for the province in that visitors have a positive feeling about the province.



Recommendations



The following recommendations are based on the issues raised by the respondents which were discussed under the findings section of this report:

- 1) It is suggested that the organizers engage the participants and the general public via social media. Possibly encouraging them to join the Facebook page via a competition. Through this platform information can be shared relating to registration and parking. This would increase participation levels as well as awareness of the event.
- 2) It seems as though the marketing of Comrades is geared towards the participants. It is suggested that the marketing of the event begins to focus on attracting non-runners to the event particularly the expo, where the general public can be exposed to activities that promote healthy lifestyles.

