

Comrades 2015 Impact Assessment: Top Line Summary Report



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Methodology



- Primary data:
 - Face to face survey – 341 respondents
 - Stratified probability sample – 189 participants and 152 spectators.
 - Respondents systematically selected over 3 days (28th May-30th May 2015) before event at the 'Comrades Experience' and at the finishing point on the day of event on 31st May 2015.
- Secondary data: Comrades Marathon Association

Positive Highlights



- There was an increase of international participants in 2015 (1 500) when compared to 2014 (1 470).
- 87% 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.
- 99% said they would recommend the event to family and friends
- 99% indicated they would recommend KZN to family and friends.
- 99% were satisfied with the information they received
- 68% 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 Entrants (cont'd)

South African Regions



Province	2013	%	2014	2015	%
KwaZulu-Natal	4 058	13%	4 573	4 607	0.7%
Gauteng	8 315	4%	8 646	9 940	15%
Western Province	1 812	5%	1 902	2 318	22%
Mpumalanga	789	11%	875	936	7%
Free State	548	3%	567	630	11%
North West	533	4%	556	627	13%
Limpopo	423	18%	499	653	31%
Eastern Province	570	-2%	566	704	24%
Northern Cape	-	-	150	198	32%

*Source: Comrades Marathon Organizers

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

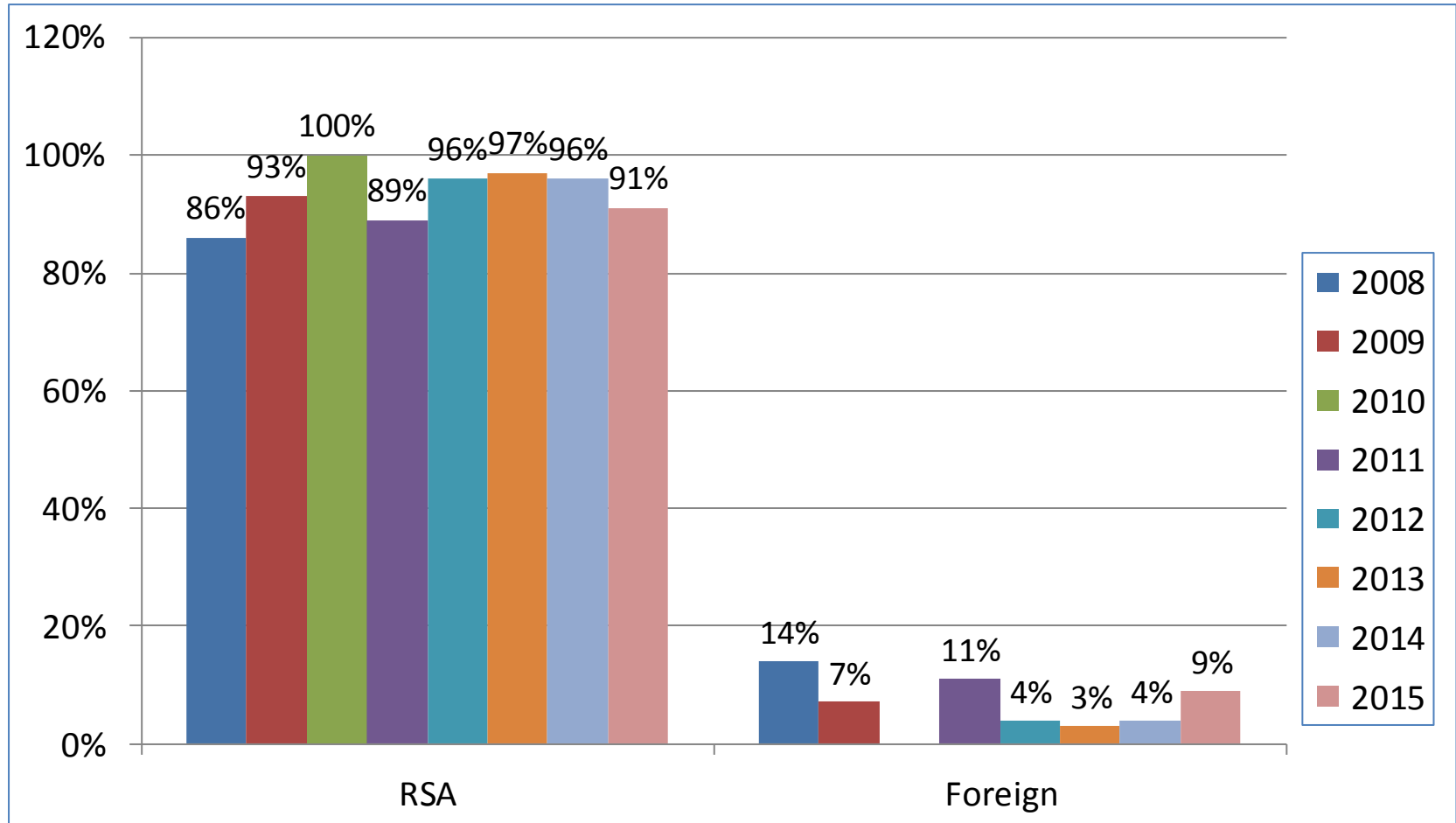
Nature and Extent of Comrades Participants (cont'd)



	2011	%	2012	%	2013	%	2014	%	2015	%
International	1 290	-	1 418	9.9%	1 422	0.28	1 470	3%	1 500	2%

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.

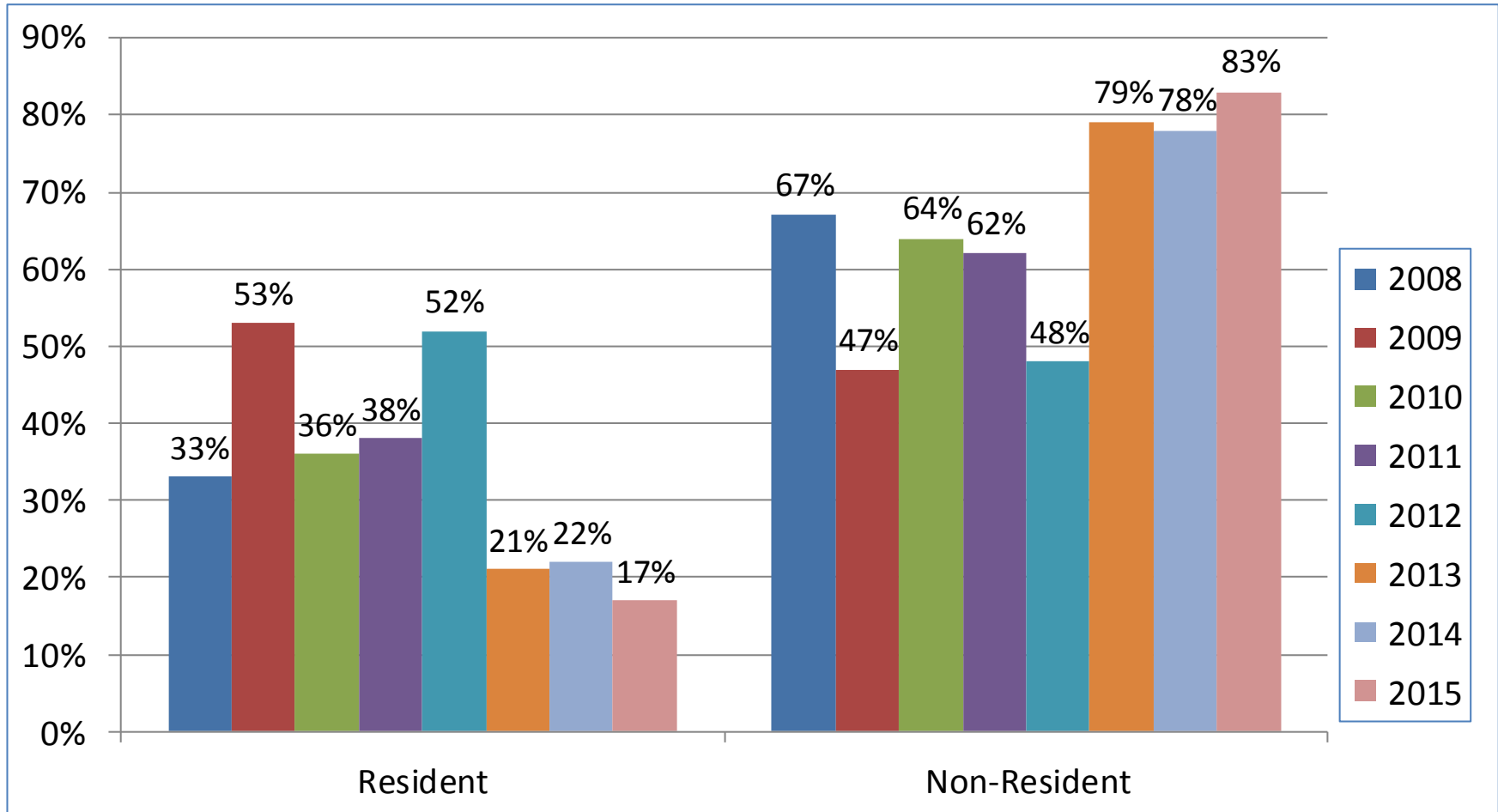
Nature of Spectator Respondents



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

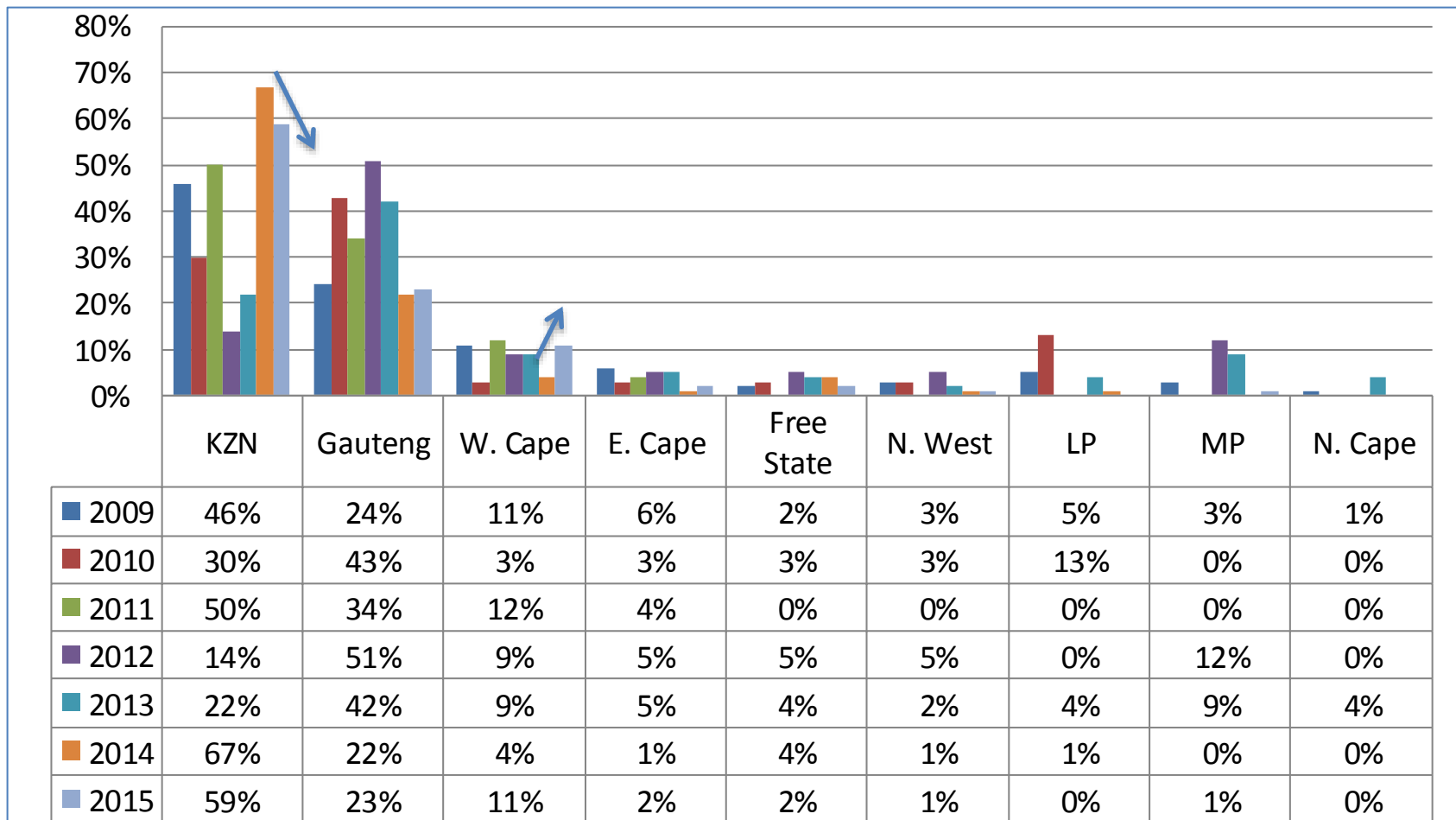
Nature of Spectator Respondents

(cont'd)



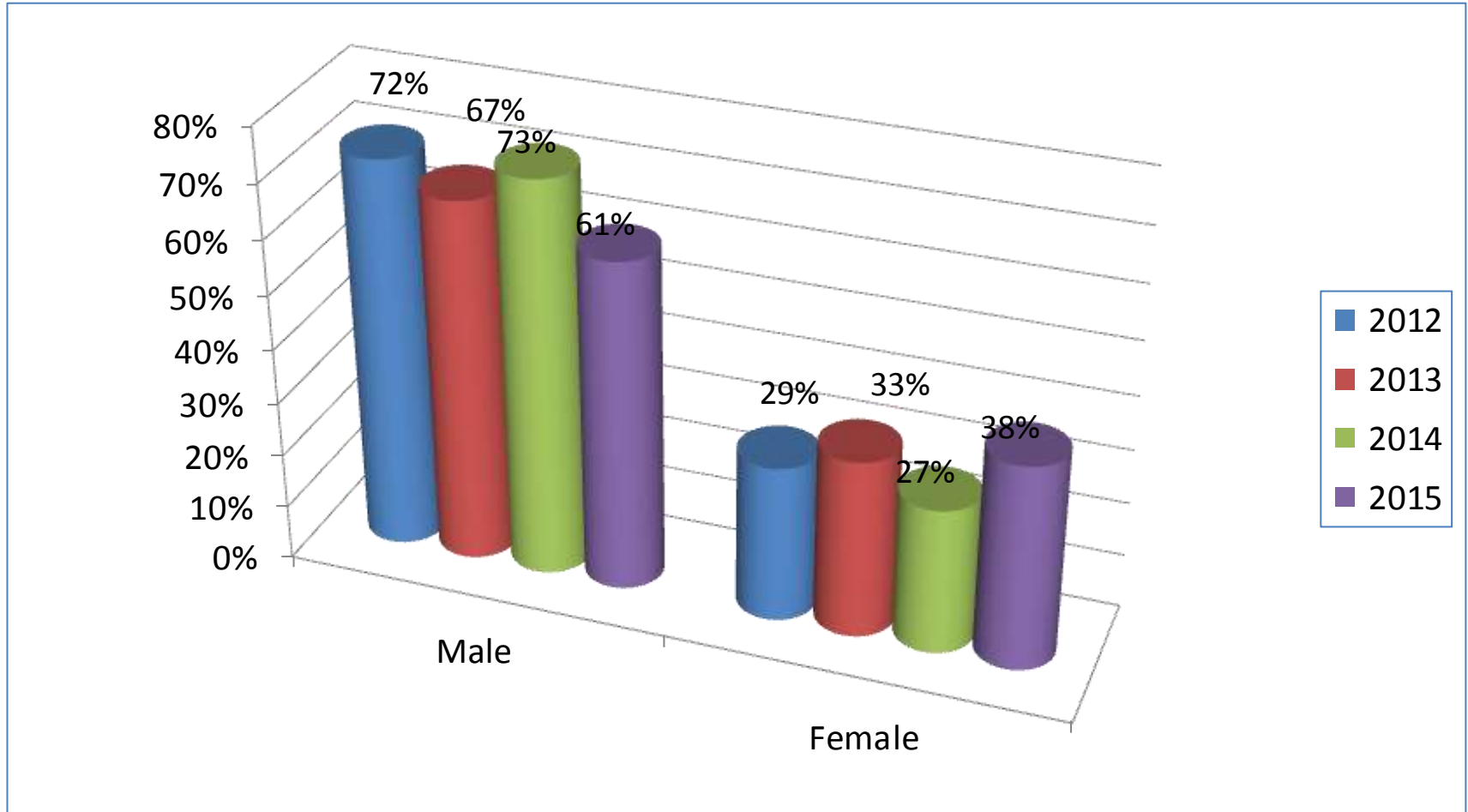
The non-resident respondents was a significant portion of the spectators. This indicated that the event draws a significant number of visitors to the destination. However, this indicated , that locals do not support the event at the finish or at the expo.

South African Non-Resident Spectators



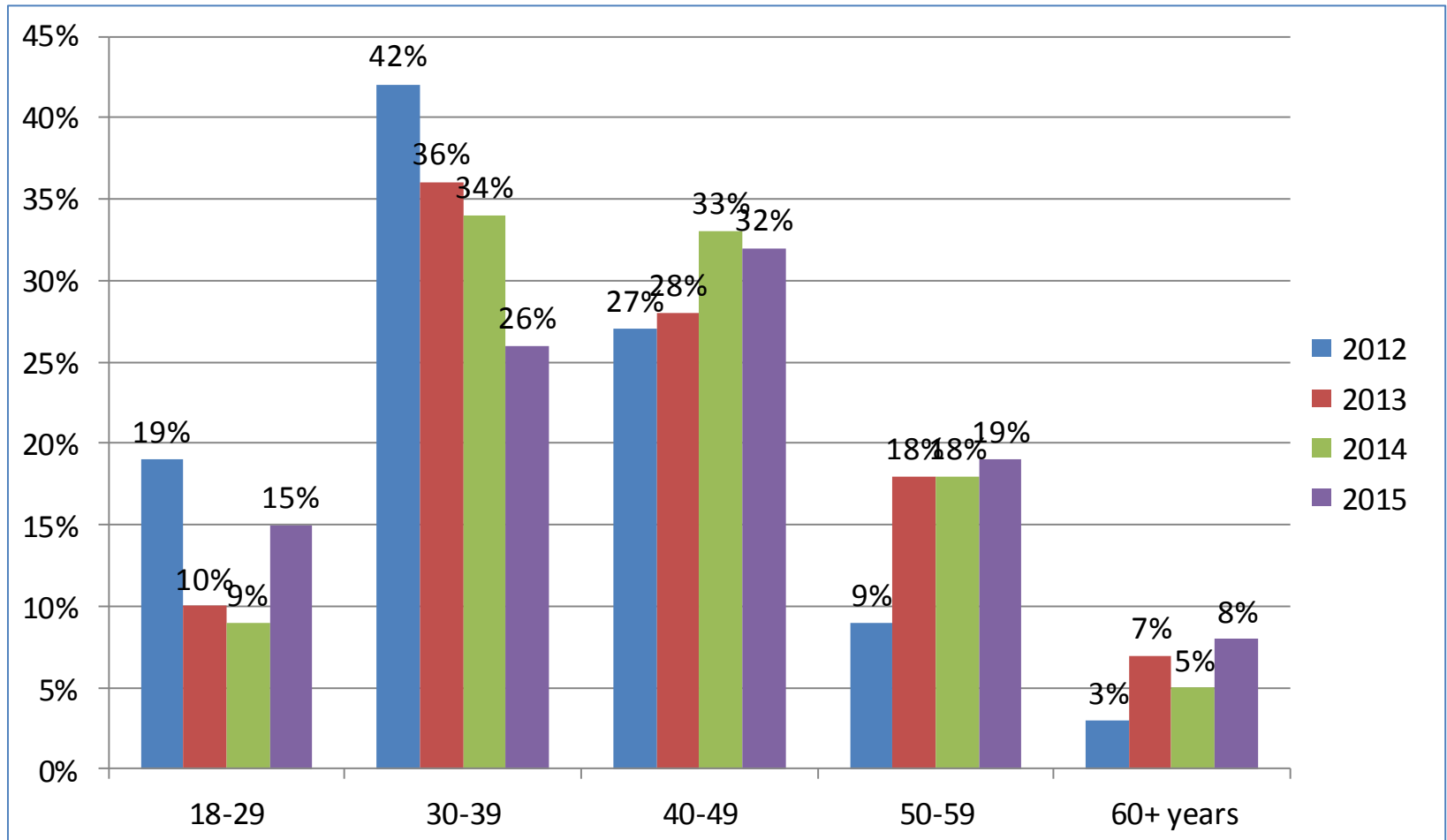
There was a slight decrease in the respondents from KZN and a significant increase in respondents from Western Cape.

Nature of Respondents: Gender



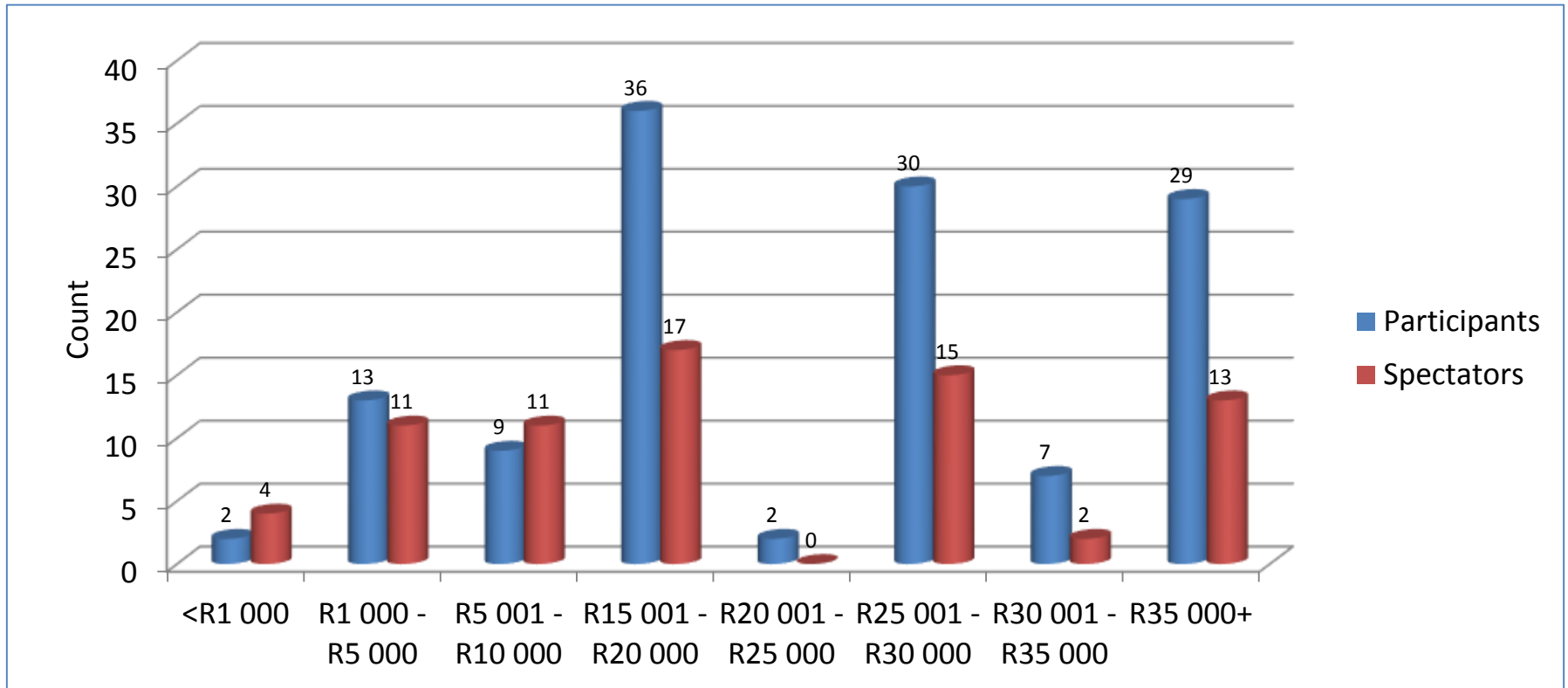
There was a slight decrease in the number of male respondents interviewed. This proportion would provide a more balanced view of the event.

Nature of Respondents: Age



Most of the respondents ages are between 30 and 49, although there were increases all the age groups except the 30-39 and 40-49 ages groups.

Income



A count of the participants income levels indicated that in general terms most participants earned incomes in excess of R15 000 per month. In comparison, spectators generally earned less than participants. Most spectators also earned more than R15 000 per month.

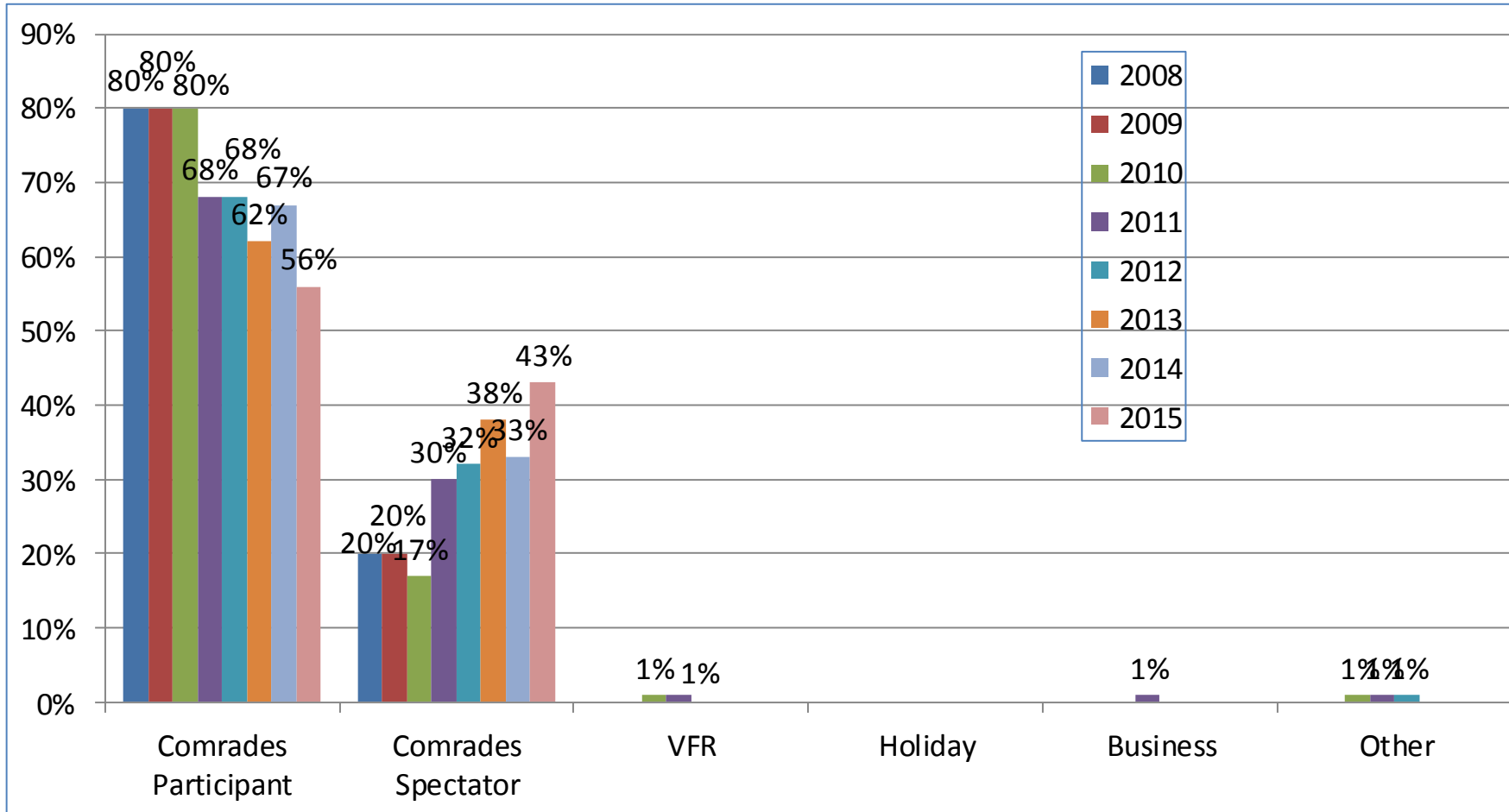
Average Group Size



Average Group Size	2012	2013	2014	2015
	2.6	2.5	3.7	3.6

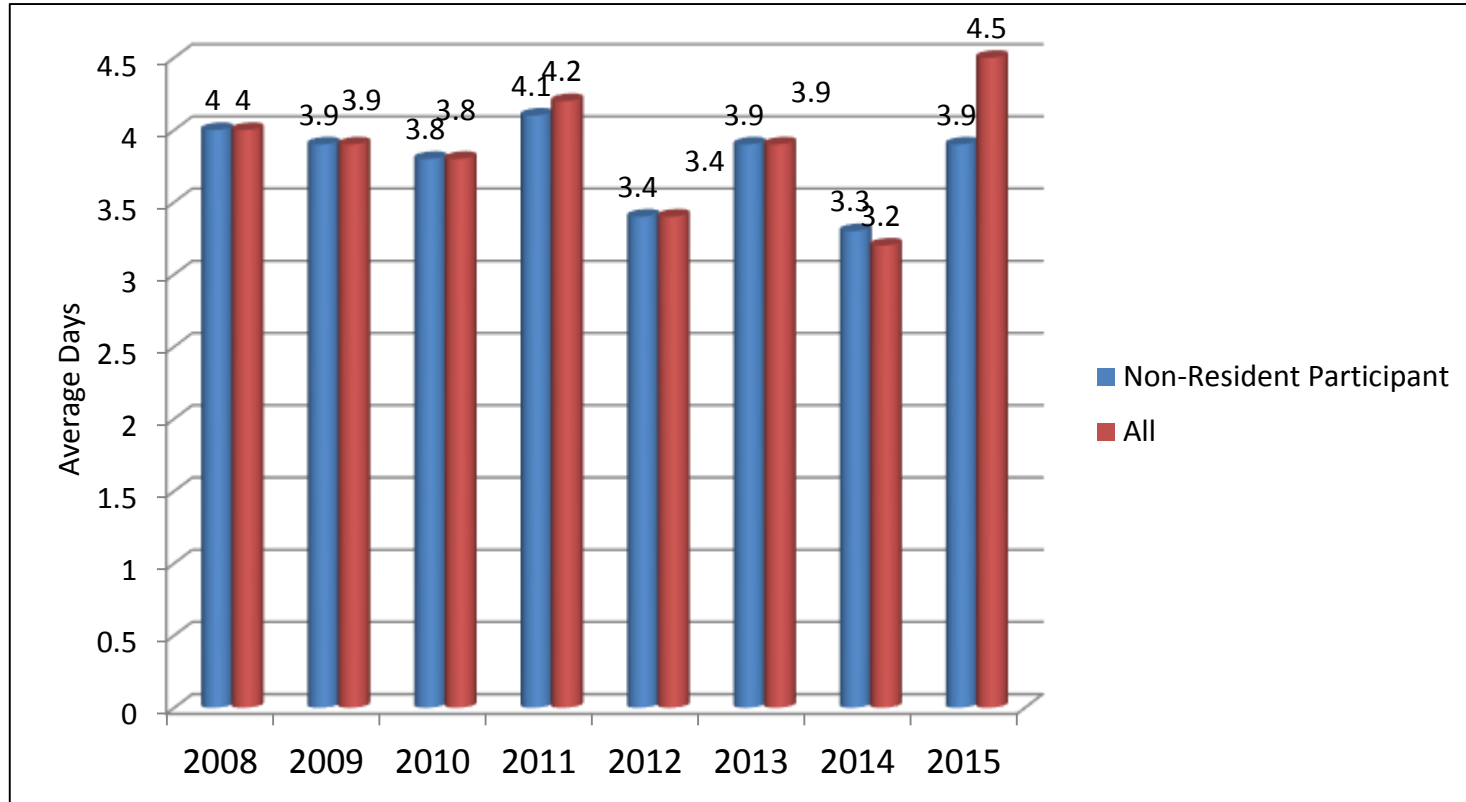
The average group size remained relatively the same as in 2014. This may indicate that people are travelling in larger groups to save on costs or that more family and friends are attending the event to support the participants.

Primary reason for visiting area where event took place



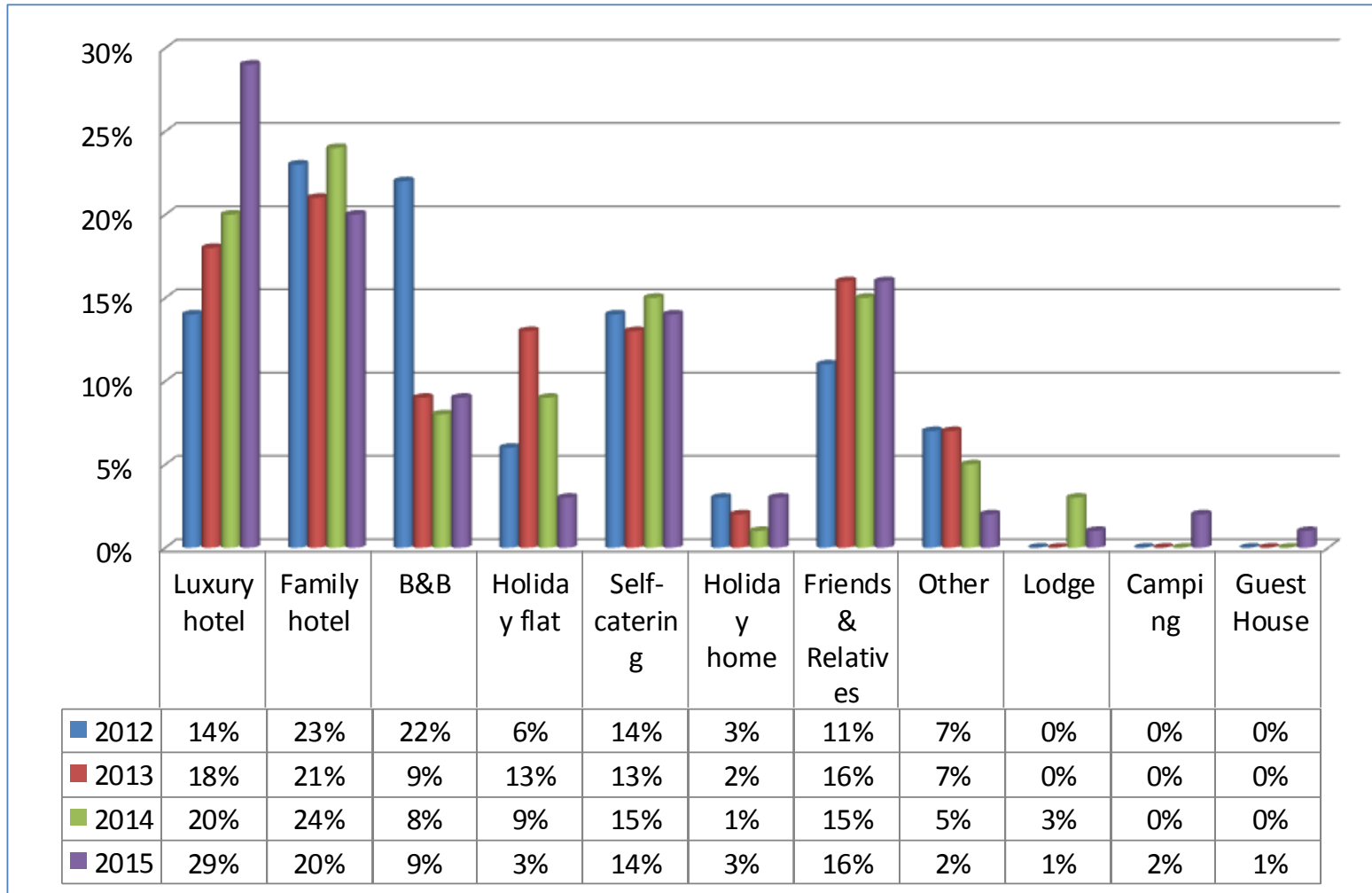
This statistic is a direct response to the increased number of spectators that were interviewed at the event.

Average Length of Stay



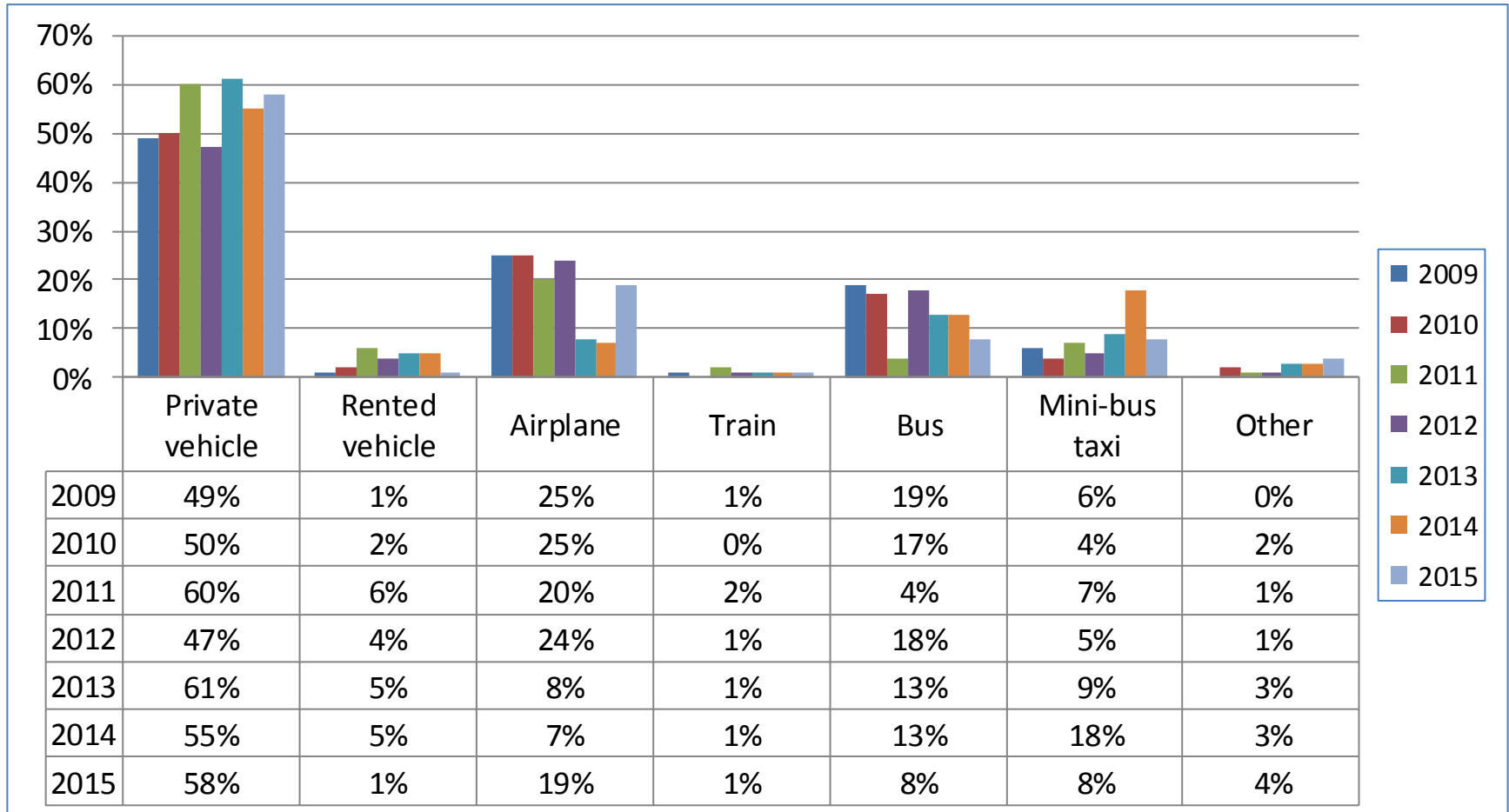
The length of stay of respondents has increased in 2015, after a decline in 2014. This is a positive sign in that the increased length of stay contributes to a higher positive economic impact.

Type of Accommodation: Non-Residents



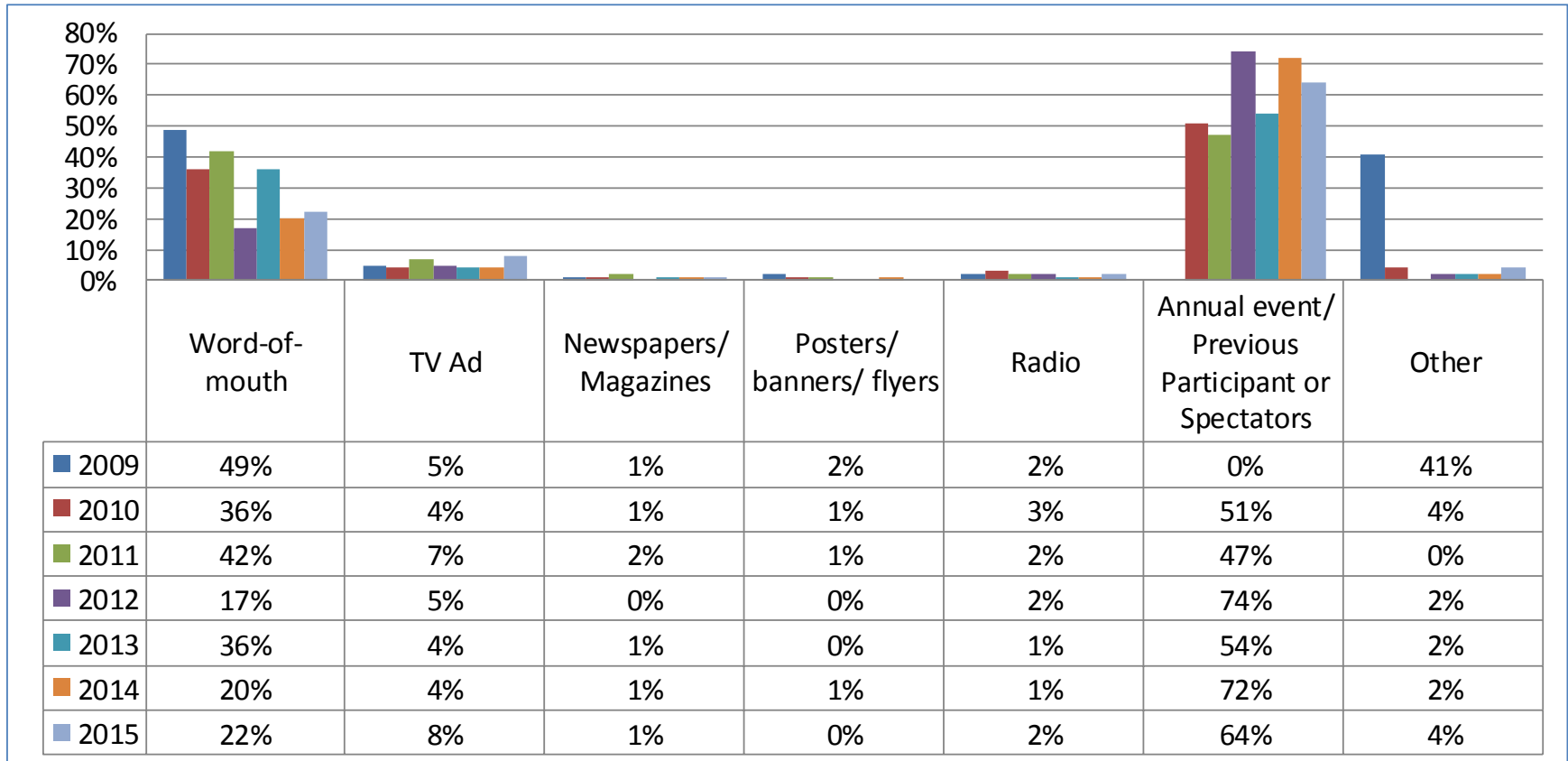
In 2015, there was a significant increase in the use of luxury hotels. Further, there were increases in the use of B&Bs and VFR. There were also decreases in the use of family hotels and holiday flats.

Transport to Event: Non-Residents



In 2015, interviews with the respondents, indicated that there was a small increase in the use of private vehicles and a significant increase in the use of airplanes by respondents. This could be attributed to the high mean spend of visitors to the destination and also to the increased number of participants from outside the province, such as the W. Cape and Gauteng.

Influence to Attend



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

Influence to Attend (cont'd)



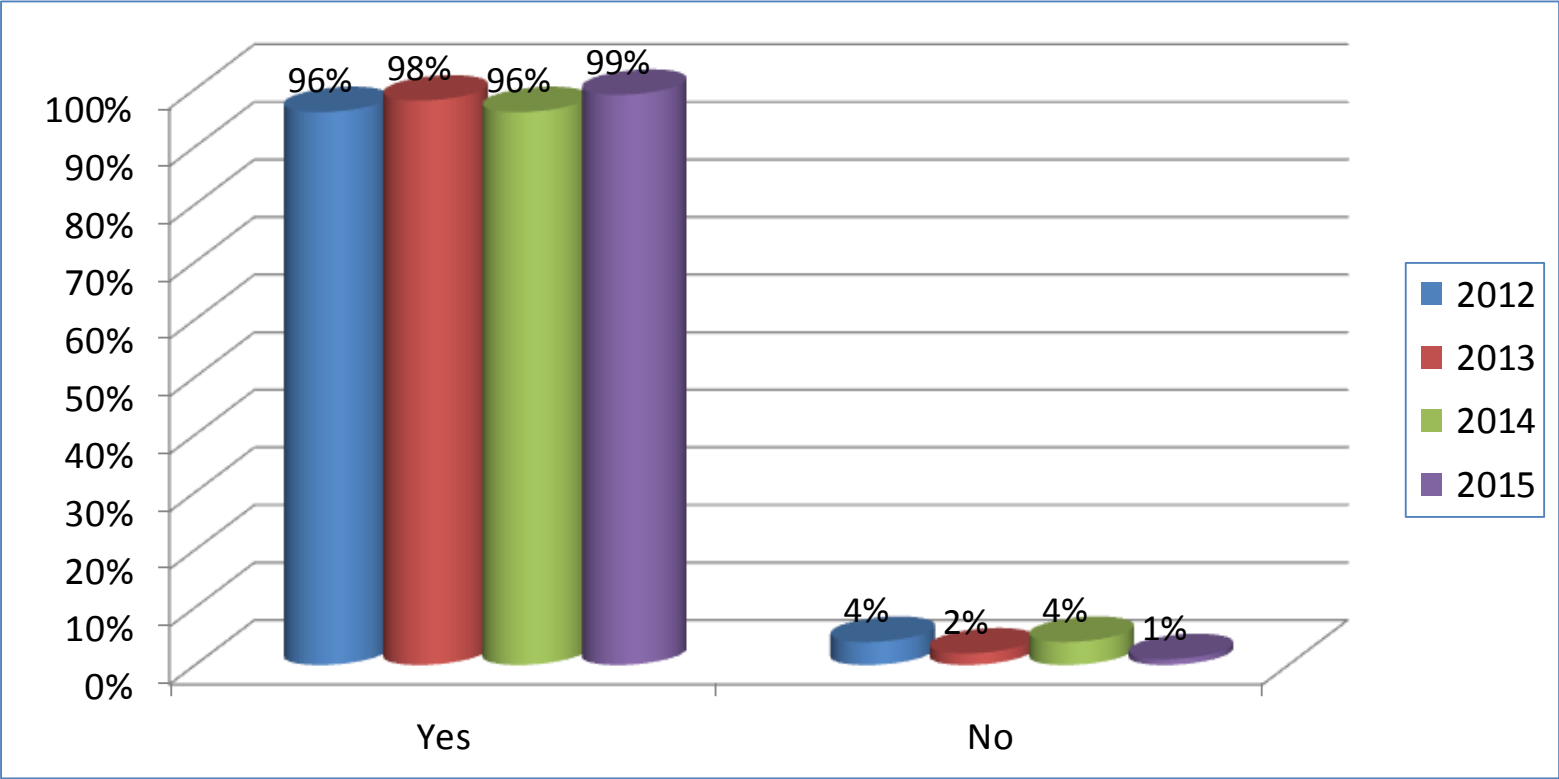
By Media

	Newspaper/ Magazine						Poster/Banner/ Flyer						Radio					
Year	'10	'11	'12	'13	'14	'15	'10	'11	'12	'13	'14	'15	'10	'11	'12	'13	'14	'15
Participants %	1	2	-	2	-	1	1	1	-	1	1	-	3	1	1	1	-	-
Spectators %	2	-	1	1	2	1	-	2	1	-	1	-	4	3	3	3	2	4

	TV Ad						Word-of-Mouth						Annual Event/ prev. participant or spectator					
Year	'10	'11	'12	'13	'14	'15	'10	'11	'12	'13	'14	'15	'10	'11	'12	'13	'14	'15
Participants %	4	3	1	5	2	6	32	43	9	36	18	17	56	50	88	55	79	74
Spectators %	4	13	11	4	9	11	53	37	31	35	24	27	30	42	50	54	56	52

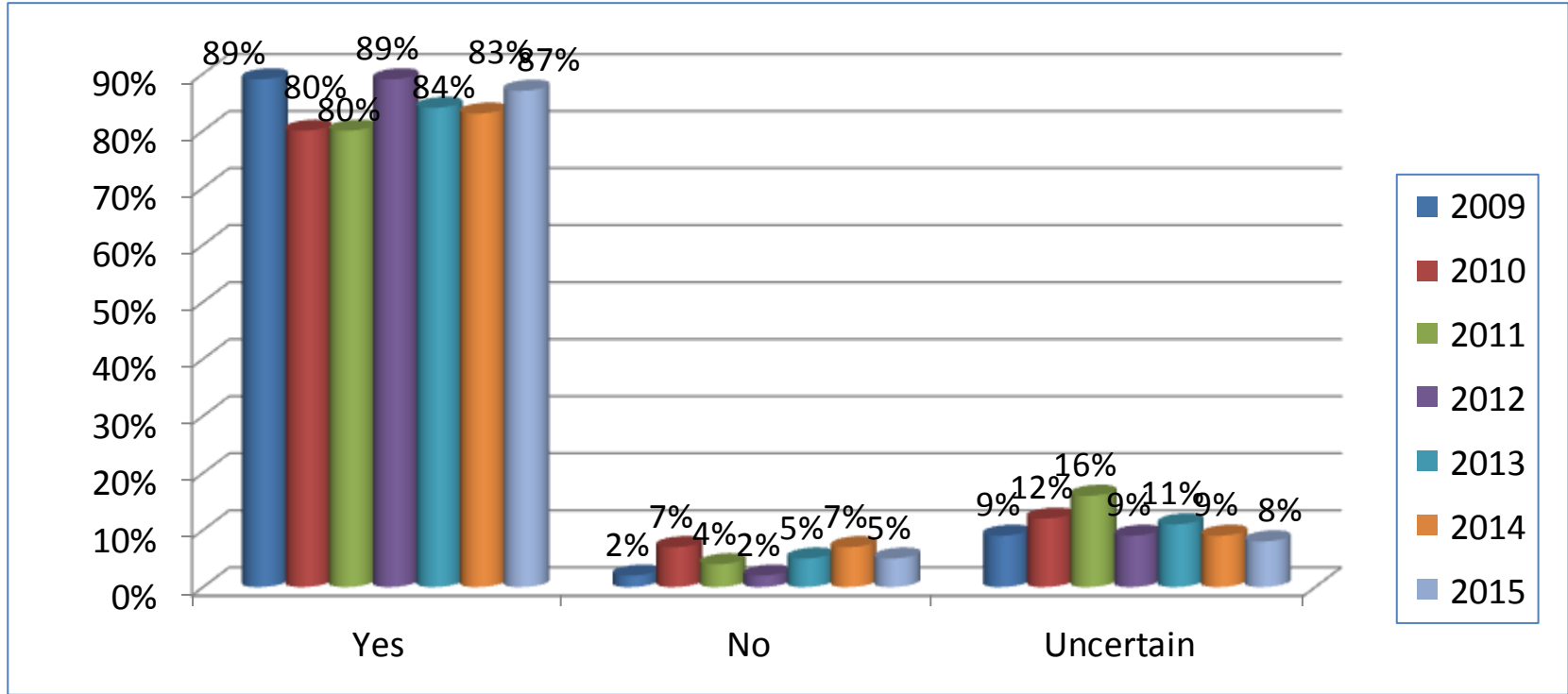
This slides indicated that for both the participants and spectators, the Comrades being an annual event has influenced them to return.

Information Satisfaction



Almost all of the respondents indicated that they were satisfied with the information provided by the organisers.

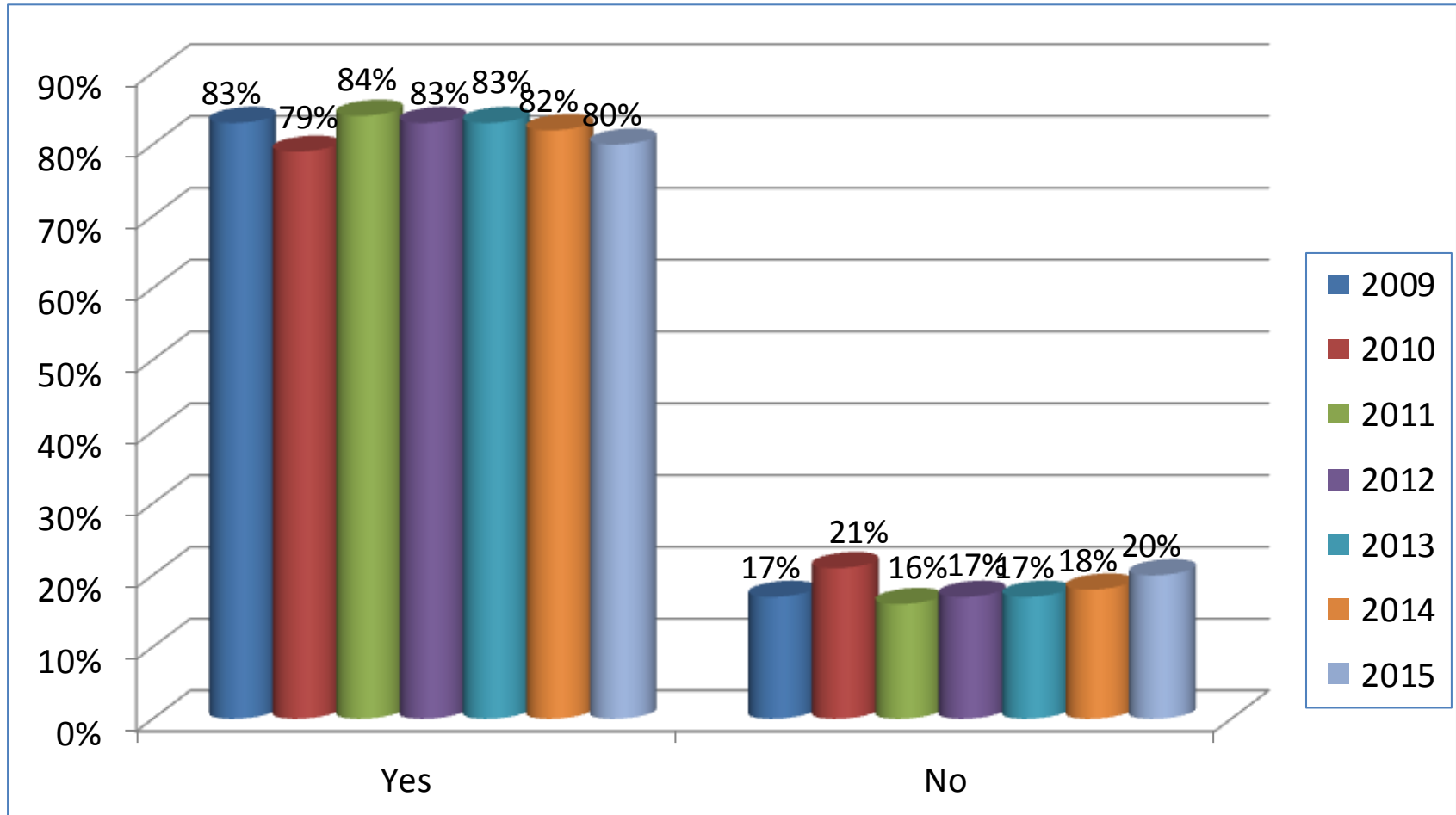
Future Attendance



	Participants						Spectators					
Year	2010	2011	2012	2013	2014	2015	2010	2011	2012	2013	2014	2015
Yes	80%	83%	89%	86%	84%	89%	85%	80%	88%	81%	82%	87%
No	9%	4%	1%	6%	6%	6%	-	4%	3%	5%	10%	3%
Uncertain	11%	13%	9%	7%	10%	5%	15%	16%	9%	14%	7%	10%

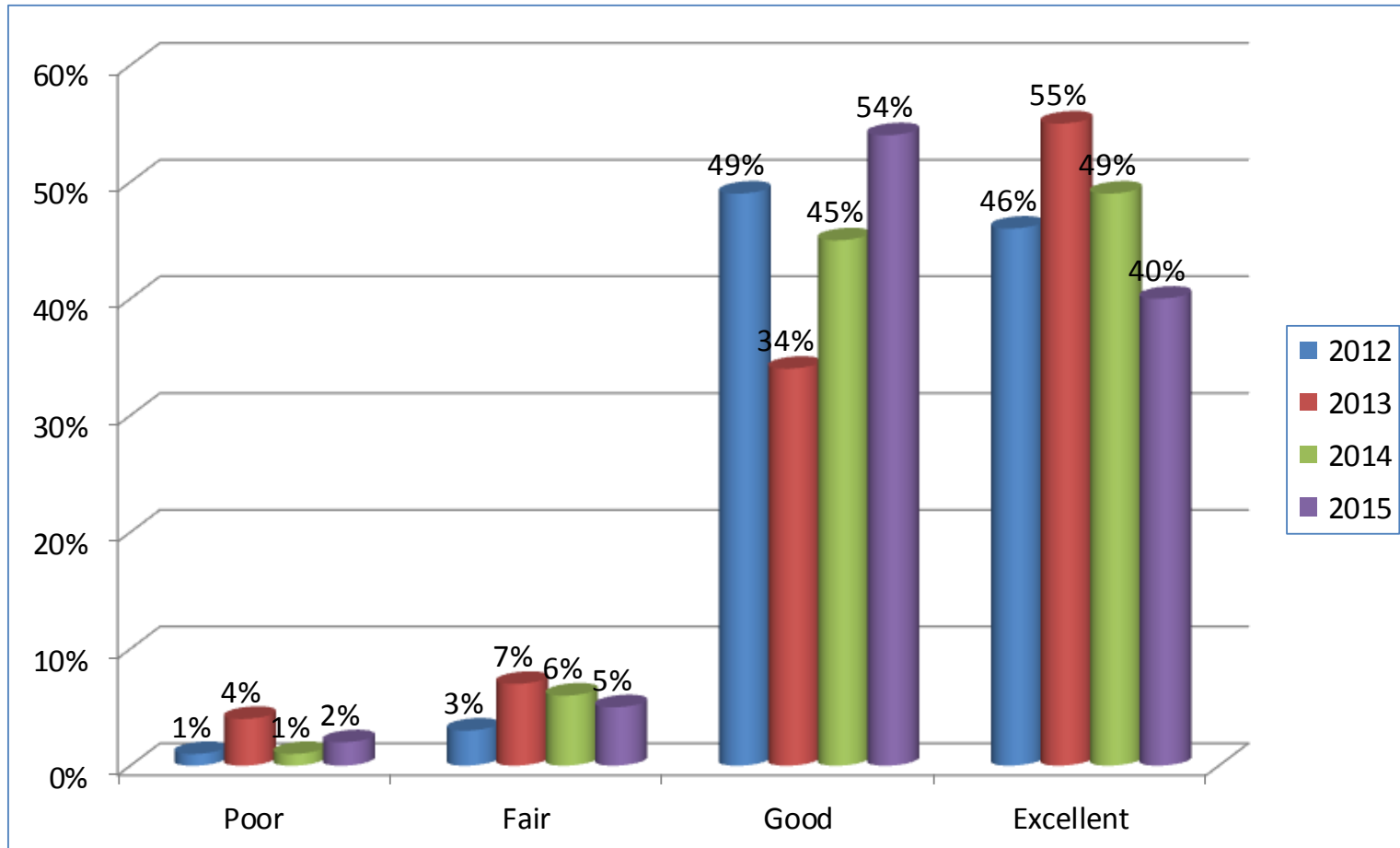
Most participants and spectators intend to return to the event next year. Comrades is an event where people participate multiple times.

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. However, there is a constant decline in respondents rating their experience as 'excellent'. This is a concern.

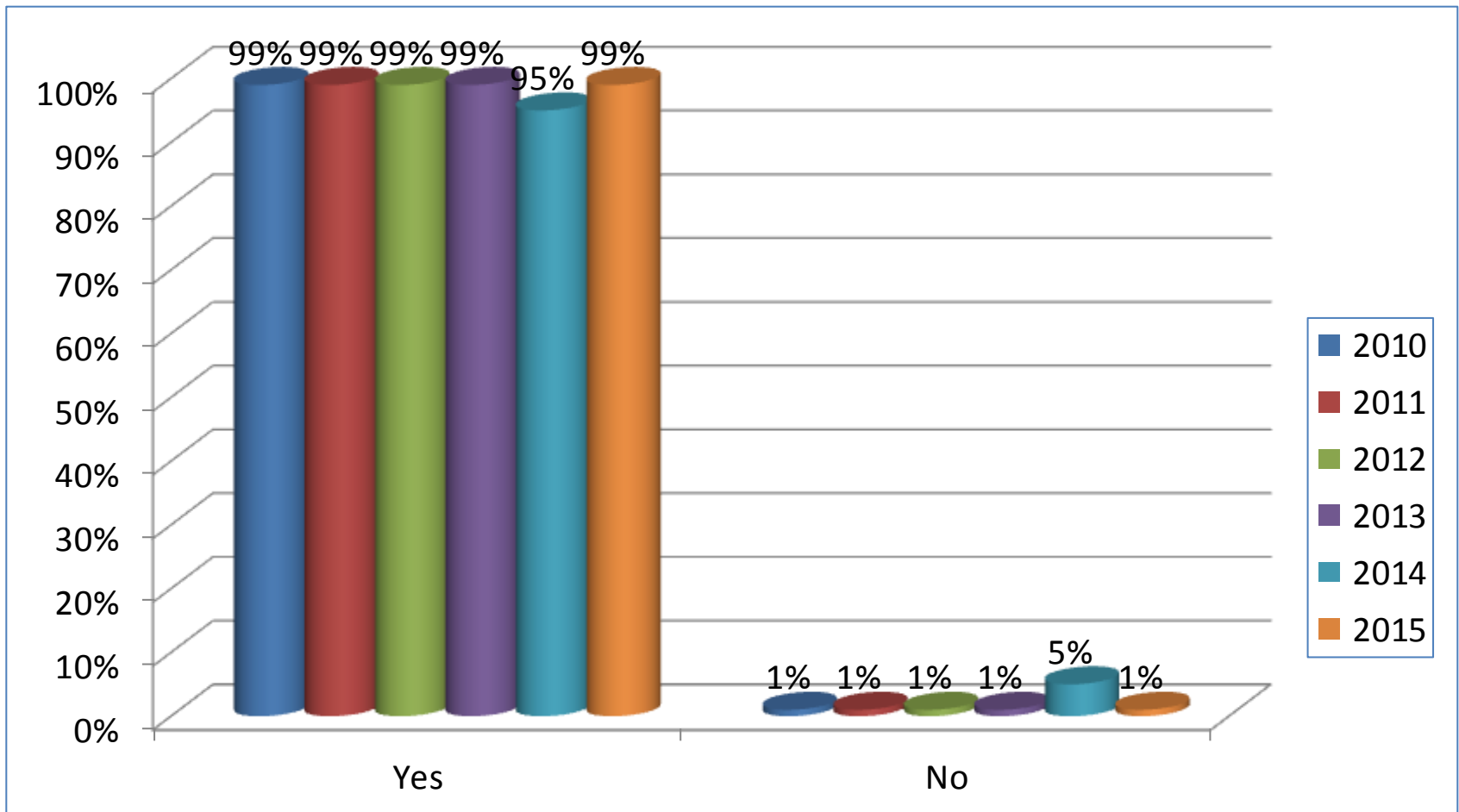
Marketing Improvement Suggestions



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) More international advertising
- 2) Market more on social media and radio
- 3) More advertisements in the print media and on TV
- 4) Advertise more often in the build-up to the event

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.

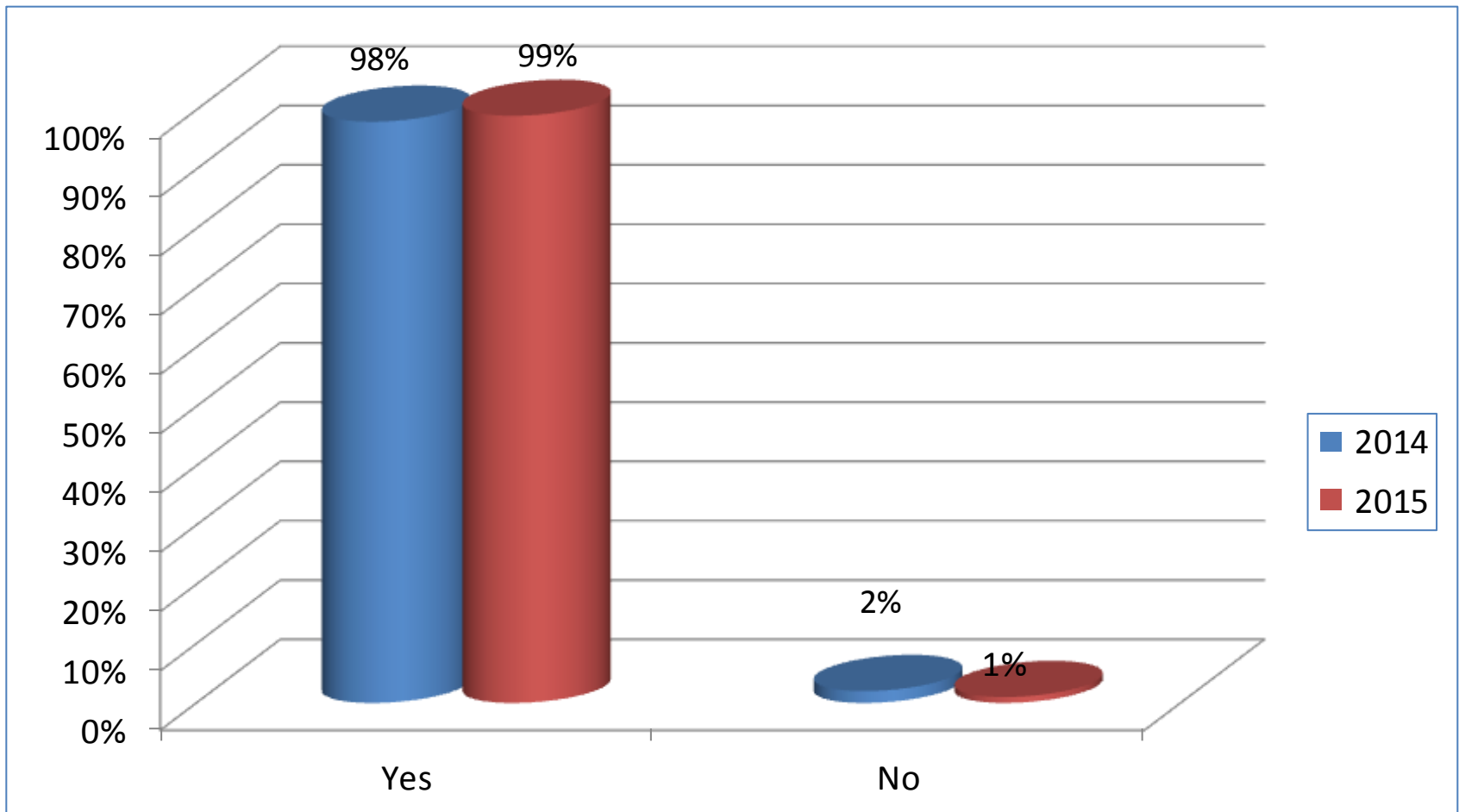
Recommend the Event to Family and Friends? (cont'd)



The event was recommended for the following reasons:

- Amazing/unique/world class experience
- Biggest marathon in Africa
- Exciting/fantastic/good event
- Fun outdoor experience
- Good family outing
- Good for the health
- Good spirit
- Challenge of a lifetime
- Unique South African event

Recommend KZN to Family and Friends?



It is encouraging that respondents would recommend KZN to family and friends. This bodes well for the tourism in the province.

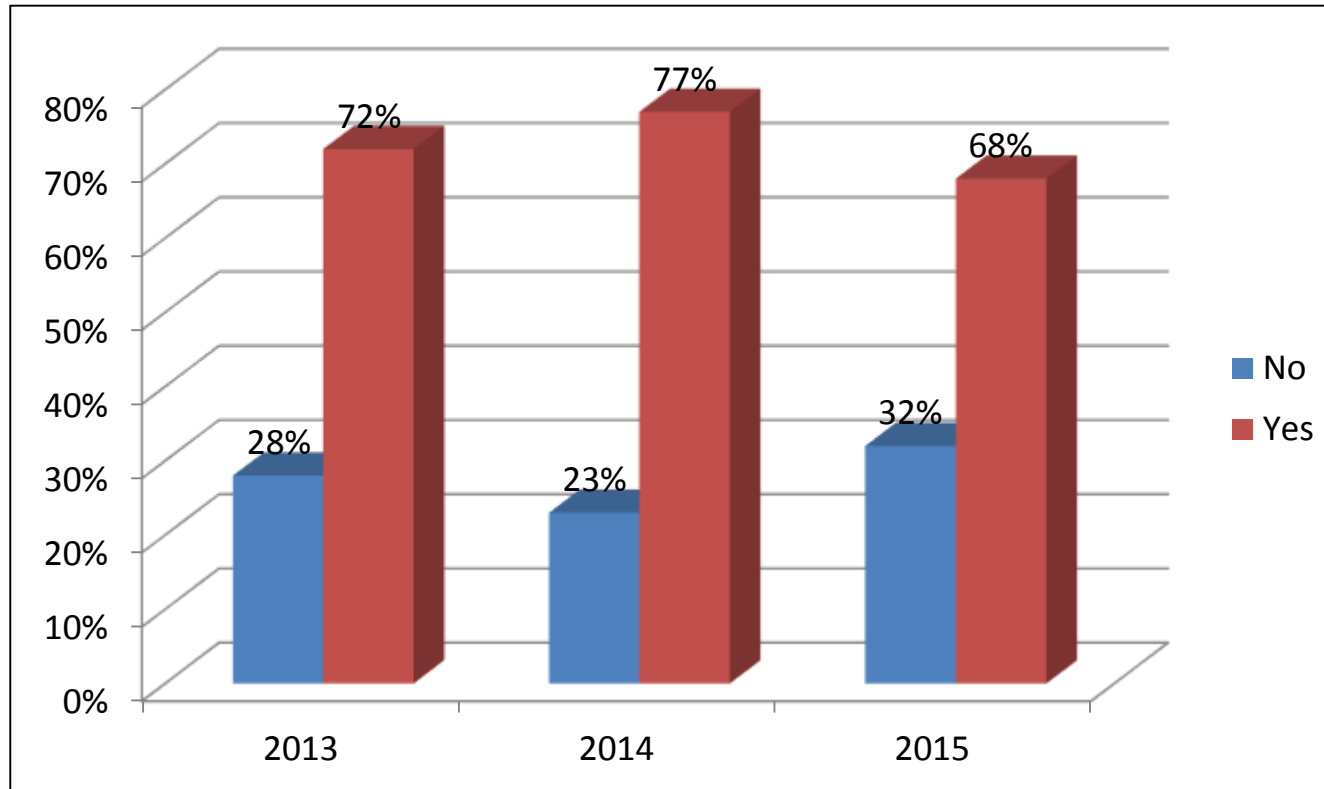
Recommend KZN to Family and Friends? (cont'd)



The province was recommended for the following reasons:

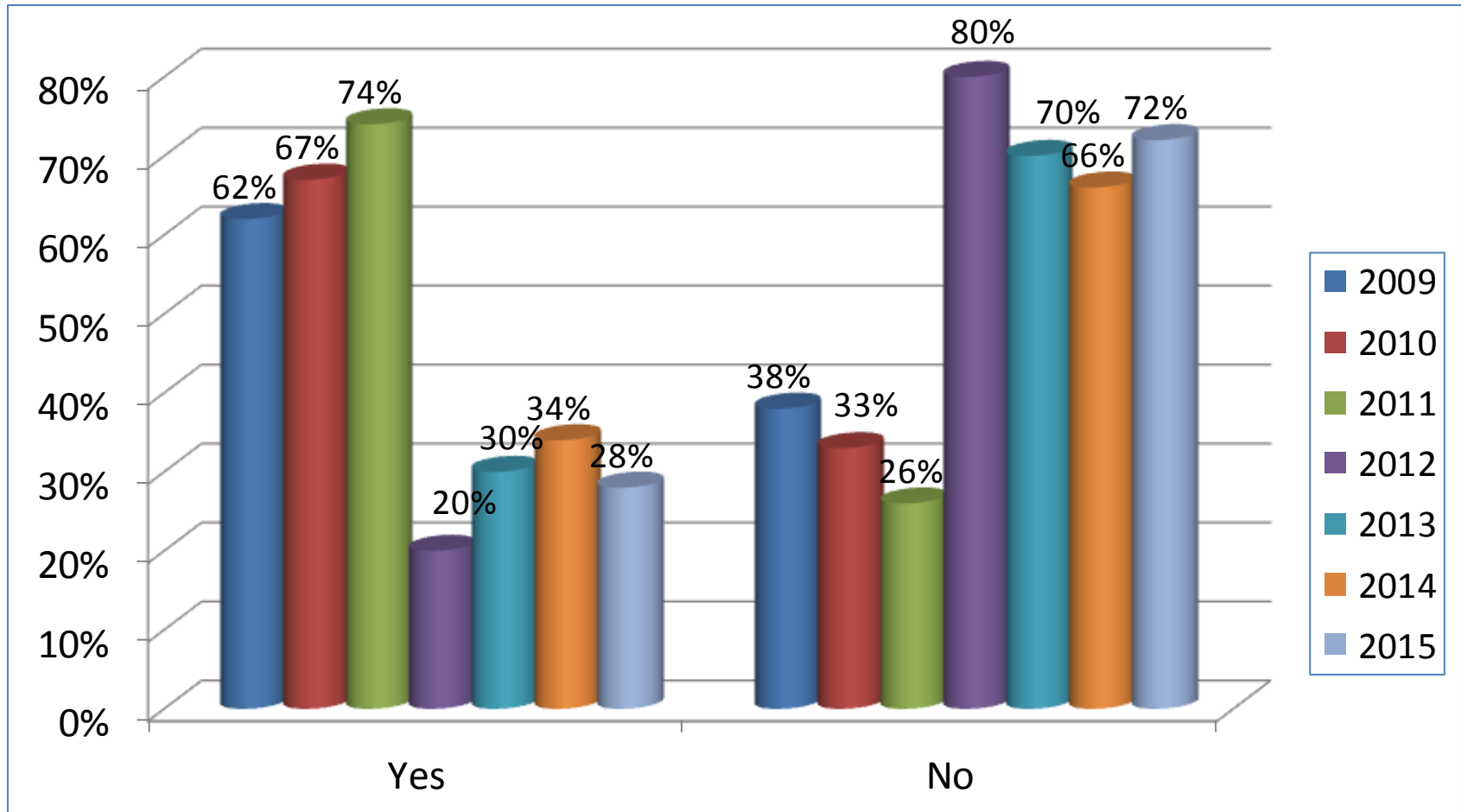
- Attractions
- Beach
- Diverse culture
- Favourite family destination
- Beautiful province/mountains
- Friendly people
- Good weather
- Good wildlife
- Good hospitality
- Lots to offer the visitor
- Many sporting events
- A place to relax

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



About 68% of the respondents indicated that they would return to KwaZulu-Natal for a holiday in the next 12 months. This was a decrease when compared to 2014. Although the proportion is not as high as in previous years, it is a very positive indication of future visits to KZN. This also bodes well for future growth of tourism in the province.

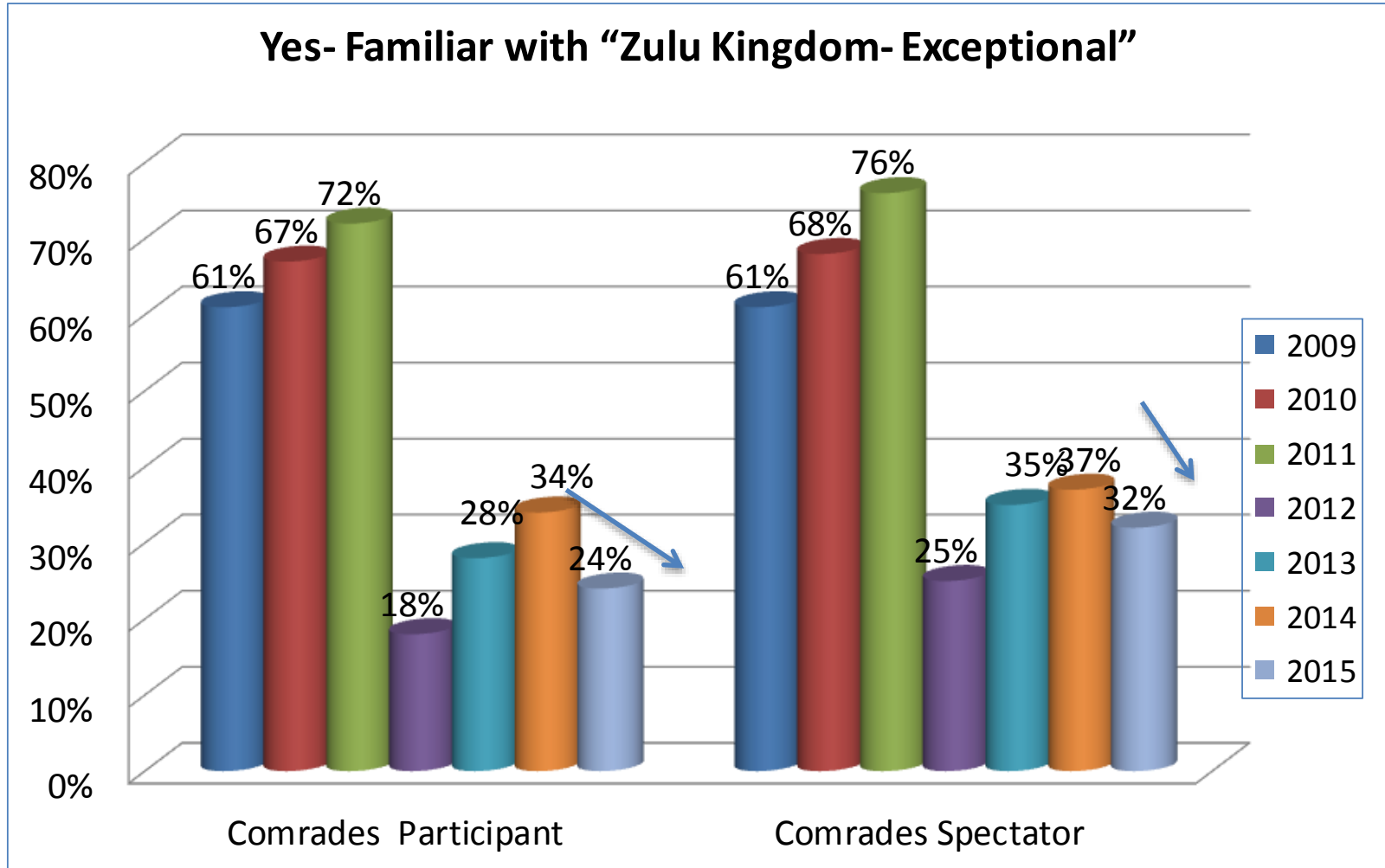
Familiarity with TKZN Slogan



The recognition of the TKZN slogan has declined in 2015, when compared to 2014. This may be as a result of TKZN not sponsoring the event and the brand not being visible in 2015.

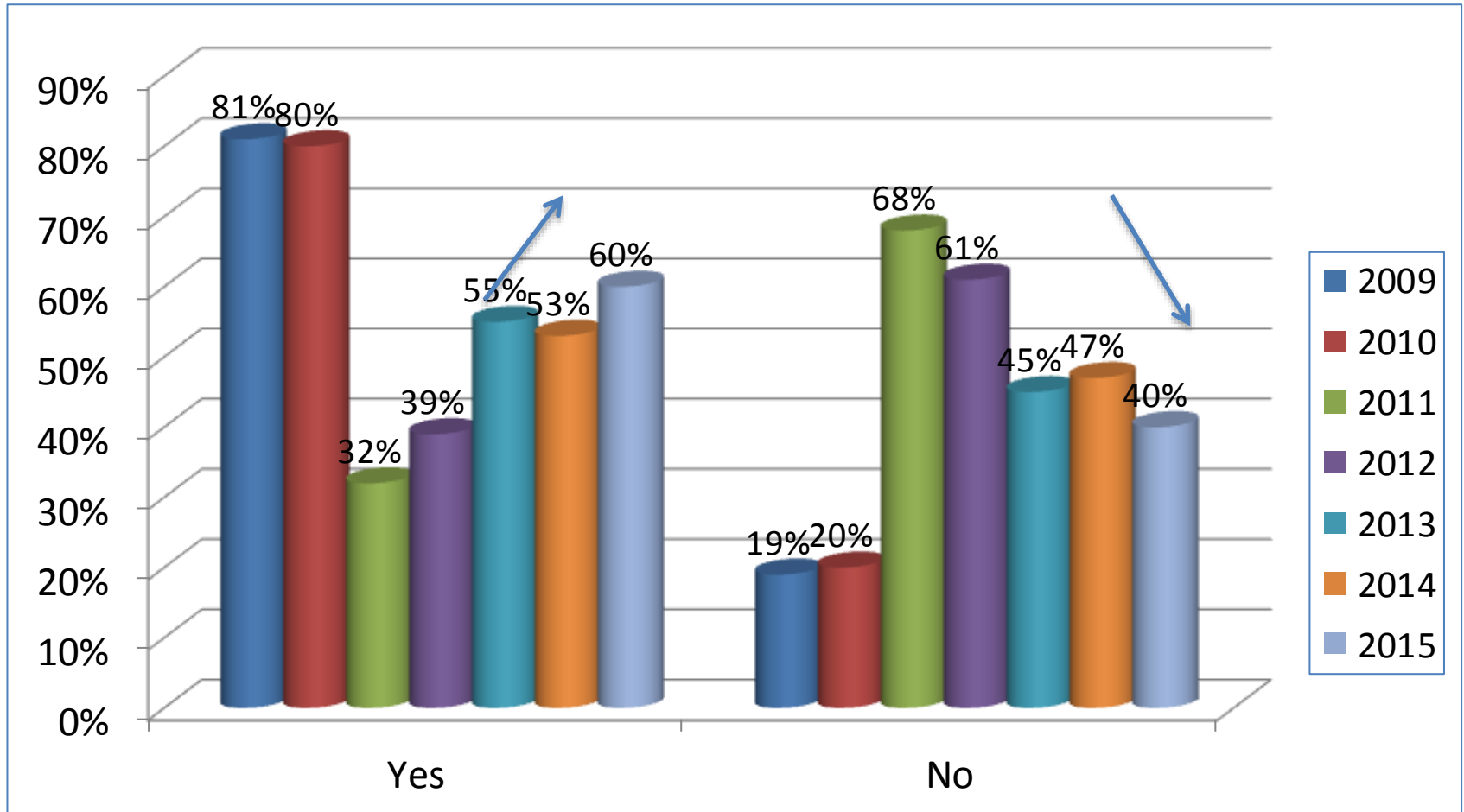
Familiarity with TKZN Slogan

(cont'd)



Both the participants and spectator respondents have shown a decreased awareness of the TKZN slogan this year. The previous three years has shown some improvement. However, the lack of brand presence at the event may have impacted on its recognition.

Noted TKZN Logo?



The recognition of the logo increased slightly in 2015 when compared to 2014. 60% of the respondents still recognised the logo. However, in light of the decline in the recognition of the logo, there may be confusion with the SA Tourism logo, which is very similar.

Noted Zulu Kingdom Logo? (cont'd)



	Resident						Visitor					
	2010	2011	2012	2013	2014	2015	2010	2011	2012	2013	2014	2015
Yes	95%	33%	41%	49%	71%	73%	73%	32%	38%	56%	48%	54%
No	5%	67%	59%	51%	29%	27%	27%	68%	62%	44%	52%	46%

Both residents' and visitors' recognition of the logo has increased. This is good. However, as pointed out in the previous slide, there may be some confusion with the SA Tourism logo.

Where Zulu Kingdom Logo Noted



	2010	2011	2012	2013	2014	2015
Billboard/ posters/banners	11%	14%	13%	7%	5%	4%
Brochures/pamphlets/flyers	8%	8%	6%	4%	1%	6%
Magazines	6%	15% (incl. newspapers)	11%	9%	3%	1%
Newspapers	3%	-	4%	3%	7%	-
Clothing	12%	7%	-	1%	2%	2%
Tourism Information Office	5%	5%	12%	1%	7%	5%
Internet	8%	15%	7%	8%	10%	4%
Television	14%	14%	10%	23%	17%	7%
Airport	8%	12%	4%	7%	12%	24%
uShaka Marine	11%	-	4%	4%	9%	17%
Durban	3%	-	4%	4%	6%	5%
Comrades Expo/Marathon	2%	4%	8%	13%	10%	9%
Casino	1%	-	-	1%	1%	1%
Indaba	-	7%	-	1%	1%	-
Various Events	-	-	2%	-	1%	1%
Advertisements	-	-	4%	2%	1%	-
Other	8%	-	12%	12%	5%	12%
Beach	-	-	-	-	1%	4%

The TKZN logo was mostly noted at the airport , followed by the Comrades Expo. Other important places were on television and on brochures and pamphlets.

Average Spend



	2009	2010	2011	2012	2013	2014	2015
Average total spend	R2 271	R2 606	R3 850	R2 253	R 4 443	R4 218	R5 739
Non-residents participants	R3 107	R3 658	R5 471	R3 224	R5 399	R5 300	R9 209
Resident participants	R826	R645	R1 177	R334	R535	R1 038	R1 186
Non - resident spectators	R2 750	R2 998	R3 930	R3 670	R5 251	R4 818	R5 630

The average spend increased in 2015 across all categories. It was noted that more respondents stayed in luxury hotels and travelled by airplane in 2015. Further, the group size has remained large and the average length of stay has increased. These factors could explain the increased average spend.

Estimated Economic Impact: Resident and Non-resident Participants



Non-resident participants

- N = 10 365 (16 993* – 6 457)
- Mean: R9 209
- Estimated direct spend **excluding** Std Error = R95 453 857
- Estimated direct spend of at least R70 357 612 and as much as R120 550 101

Resident participants

- N = 6 457
- Mean: R1 186
- Estimated direct spend **excluding** Std Error = R7 660 207
- Estimated direct spend of at least R4 860 416 and as much as R10 459 998

*This is based on 16,993 runners who started the race and not 22,562 who registered.

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



Non-resident spectators

- N = 29 150 (55 000 – 25 850 local spectators)
- Mean: R5 630
- Estimated direct spend **excluding** Std error = R164 129 448
- Estimated direct spend **taking** Std error of mean into account: At least R120 059 193 and as much as R208 199 704.

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

Estimated Economic Impact: Participants and Non-Resident Spectators

	2012	2013	2014	2015
Non-resident participants	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	Low: R70 357 612 Middle: R95 453 857 High: R120 550 101
Resident participants	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	Low: R4 860 416 Middle: R7 660 207 High: R10 459 998
Non-resident spectators	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	Low: R120 059 193 Middle: R164 129 448 High: R208 119 704
Direct spend	*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	*At least R190 416 805 As much as R328 664 805
Total spend	*At least R107 968 437 As much as R164 816 494	***At least R287 138 447 As much as R486 693 030	*** A least R303 473 108 As much as R608 192 997	*** A least R380 833 610 As much as R657 339 610

*

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 2.0 was used to more accurately estimate the broader economic impacts.

Problems Experienced



2012	2013	2014	2015
Difficulty in finding the stadium	Administration struggled to find their names	More marshals	Too much traffic
Lack of signage	Did not receive the sms	More in goodie bags	Not enough parking
	More in goodie bags	Administration problems in processing the registration of participants.	More security needed
	More parking for spectators		Clothing in Comrades store is too expensive
			Not enough goodie bags

Findings



1. There was an a 32% and 31% increase in the number of entrants from the Northern Cape and Limpopo respectively. There was a increases from many other South African regions. There was also a small increase in entries from overseas which could suggest that the work that is undertaken to attract such markets, is paying dividends.
2. In 2015 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. Most of the respondents were from KZN (59%). This is to be expected as the event is held on KZN. A significant portion of the respondents were from Gauteng (23%).
4. The Comrades Marathon attracts people from different age groups. The 2015 race was mainly attended by people in the age groups 30-39 and 40-49. There was a slight increase in the age group 18-29. The 30-39 age showed a decline for the third straight year. The 40-49 age groups is now the largest.
5. 98% of the 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 3.6.

Findings (cont'd)



7. It appears that the average length of stay increased to an average of 3.9 nights for non-resident participants and to 4.6 nights for all respondents.
8. There was a significant increase in the proportion of respondents who stayed in luxury hotels (29%) in 2015, when compared to 2014 (20%). About 20% of the respondents stayed in family hotels. Stays in B&Bs continued to decrease amongst those who were interviewed.
9. Most (64%) respondents attended are participated in previous Comrades Marathons. The Comrades Marathon is a national event and people make an effort to attend.
10. 99% of the respondents were satisfied with information that was provided through various media mentioned above.
11. It appears that most participants and spectators were satisfied with the event. This was shown by the level of future attendance as 89% and 87% of participants and spectators respectively indicated that they would attend the event in future.
12. Only 20% of respondents were attending for the first time suggesting that in spite of the Comrades being a long standing event, it is still able to attract new people.
13. About 94% of respondents had 'good' or 'excellent' experience at the event. This may indicate that the event is well organised and offers good value and entertainment for those who attend.

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:
 - More international marketing
 - More marketing on social media
 - Advertise more often in the build up to the event
15. The majority of respondents (99%) said they would recommend the event to family and friends. They cited the following reasons for doing so:
 - Amazing/ unique/world class experience
 - Biggest marathon in Africa
 - Fun outdoor experience
 - Challenge of a lifetime
 - Unique South African event
16. About 68% of the respondents indicated that they would return to KwaZulu-Natal for a holiday in the next 12 months. This is a small decline from 2014 (77%).

Findings (cont'd)



17. Only 28% of the respondents were familiar with the Zulu Kingdom slogan. This was a small decrease from 34% in 2014. The new slogan was introduced in 2011. This decrease indicates that more work needs to be done to improve the recognition of the TKZN brand.
18. There were also decrease in the levels of recognition of the slogan by Comrades, participants (24%) and spectators (32%), when compared to 2014.
19. The noting of the logo was 60% in 2015 from a low noting of 32% in 2011. This is a significant improvement which is the result of continued branding exercises by TKZN. However, this statistic is not reliable in view of the lack of recognition of the TKZN slogan, which is on the logo. This is an indication that there may be confusion between the SA Tourism logo, the SA flag and the TKZN logo.

Recommendations



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

- 1) In 2015, the organizers made some changes regarding the registration of the participants. It is clear that they have tried to improve this process. However, due to the nature of the event (thousands of participants), it is suggested that the organisers communicate with the participants to inform them of the best possible times to register.
- 2) It is also suggested that the organisers encourage locals to attend the event, specifically the finish, through local radio and during the TV commentary.
- 3) There is always a need to increase the international representation at an event such as this. To further increase international participation, it is suggested that the organisers focus on getting more runners from Africa to participate, through the various national federations and associations.
- 4) The lack of content in the 'goodie bags', has been mentioned since 2012. The runners seem to want more than what is currently provided. It is suggested that TKZN add a question with regards to the content of these bags to determine what runners would like to have in their bags. There may be an expectation in terms of what is paid as an entrance fee and what is received in the bag.
- 5) Participant respondents experienced administration problems during the registration process in 2013 and 2014. However, this seemed to have abated in 2015.

Recommendations



6. In Pietermaritzburg, parking seemed to be a problem, as this was only raised when the finish was in Pietermaritzburg. It is suggested that the organizers appoint a service provider to assist with parking as the 'self appointed' car guards add to the congestion problem. Further, maps can be distributed at the Expo and in the goodie bags, explaining the traffic flows and where suitable parking is available.
7. There is a lack of association of TKZN's slogan with tourism. It is suggested that TKZN needs to implement a strategy that will strengthen the relationship between the brand and tourism/holidays, as well as improve the recognition of the logo and slogan.