

Mandela Day Marathon Impact Assessment: Top Line Summary Report



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Methodology



- Primary data:
 - Face to face survey – 200 respondents
 - Stratified probability sample – 144 participants and 56 spectators.
 - Respondents systematically selected on the day of the marathon at the Mandela Capture Site.
- Secondary data: Mandela Day Marathon organizers.

Positive Highlights



- 92% of the participants said they would attend the event again in future.
- 81% of those interviewed said they had either a good or excellent experience.
- 96% said they would recommend the event to family and friends.
- 98% indicated they would recommend KZN to family and friends.
- 87% were satisfied with the information they received.
- 79% will visit KZN in the next 12 months of a holiday.

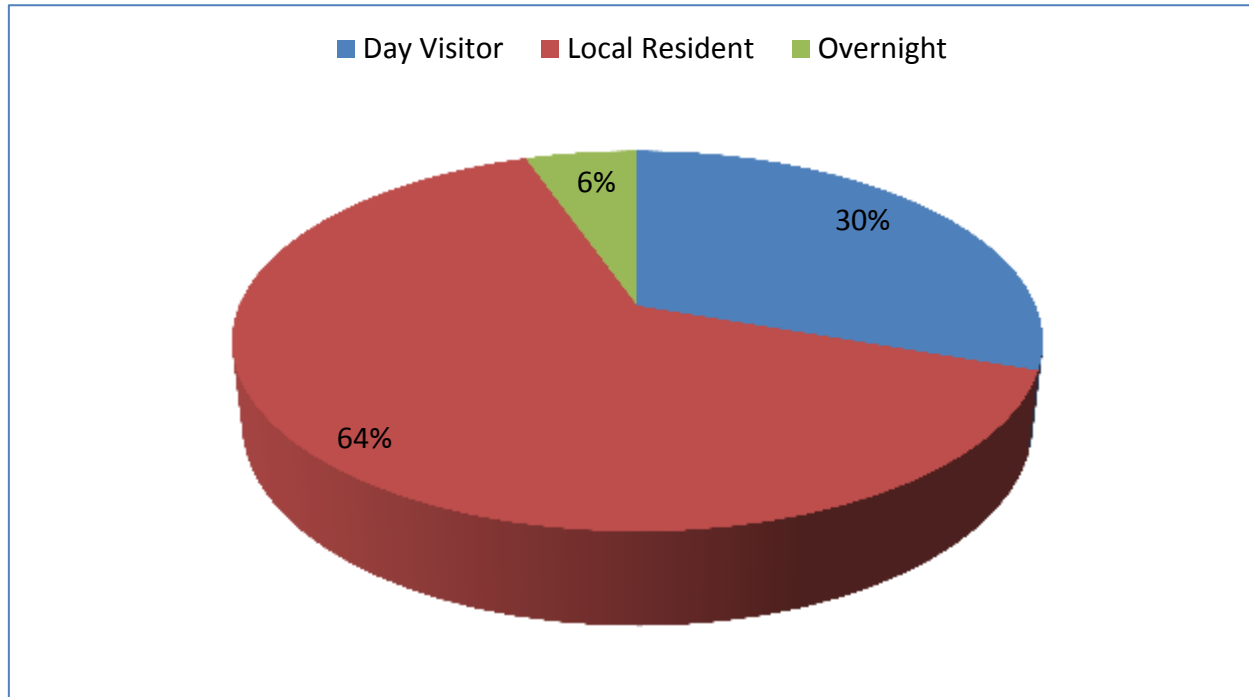
Nature and Extent of Participants



International	2014
South Africa	7048
Zimbabwe	44
Lesotho	26
Kenya	18
Ethiopia	15
United States	7
Switzerland	6
Great Britain	6
Malawi	3
Mozambique	2
Netherlands	2
Nigeria	2
France	2
Canada	2
Uganda	2
Cameroon	1
Denmark	1
Botswana	1
Germany	1
Ghana	1
Ireland	1
Italy	1
Sweden	1

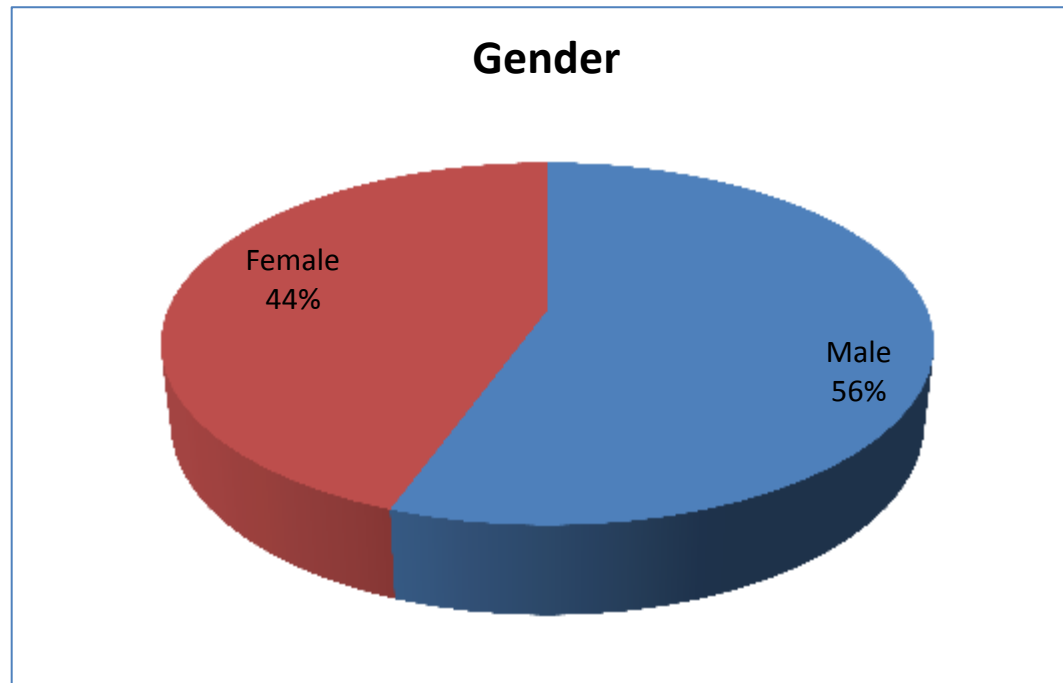
South Africa = 98%
International = 2%

Nature of Spectator Respondents



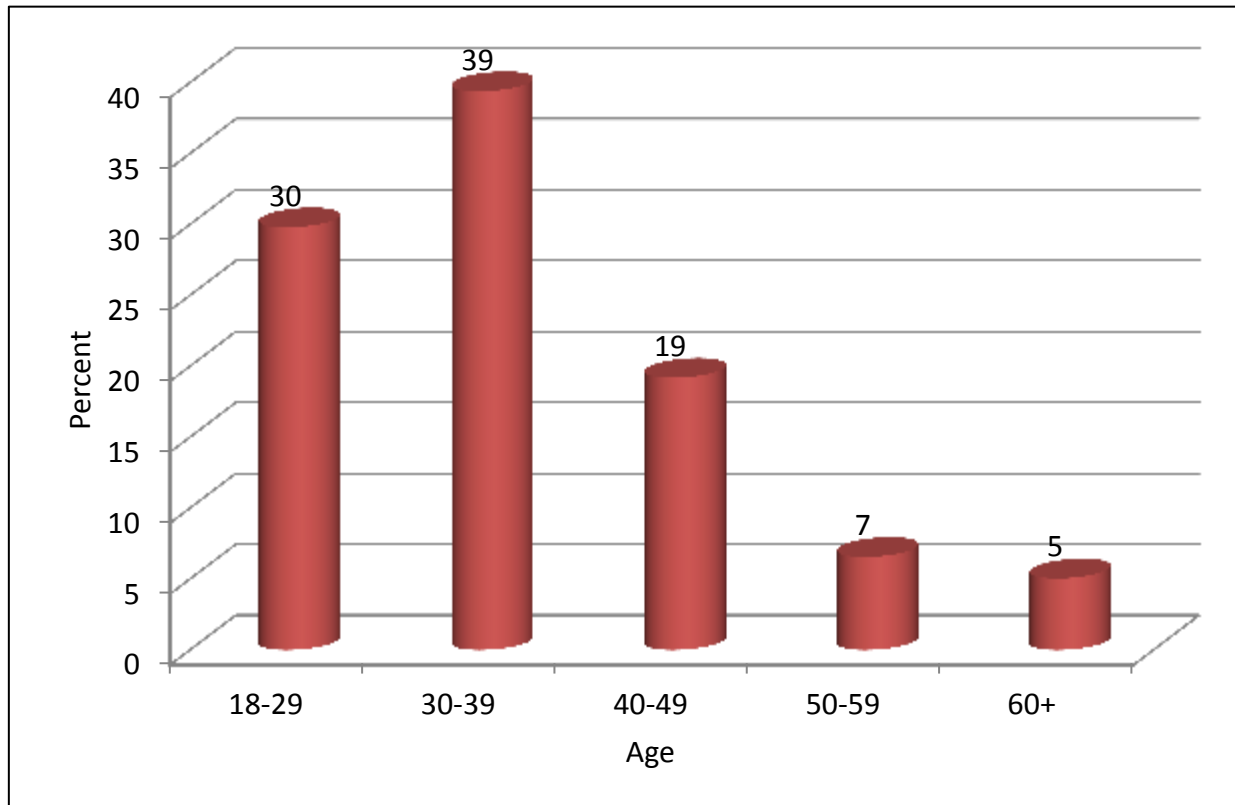
Most of the respondents (64%) were local residents. However, 61% of the participant respondents were visitors to the region.

Nature of Respondents: Gender



56% of the respondents were male. About 66% of the participants interviewed were male.

Nature of Respondents: Age



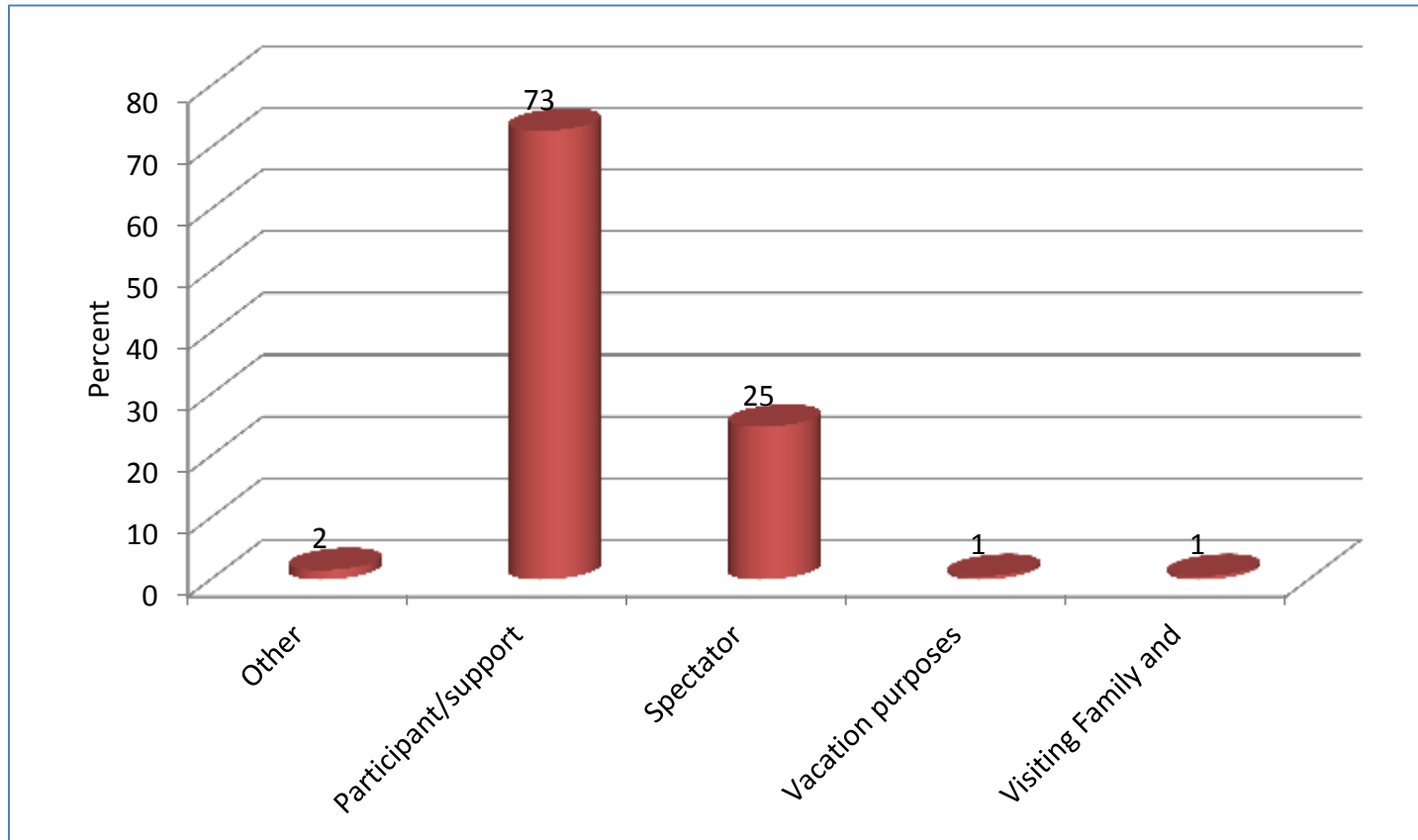
Most of the respondents are between 18 and 39. This reflects the event in terms of the physical challenge, where it is expected that younger people will participate in strenuous activities. The representation of the higher age groups is lower as would be expected in terms of this type of event

Average Group Size



Average Group Size	2014
	3.1

Primary reason for visiting area where event took place



Most of the respondents (73%) were participants. The number of spectators was estimated to be 15 000. The nature of the event does not lend itself to attract large spectators due to the event being over by 2pm, unlike the Comrades which takes place until 6pm.

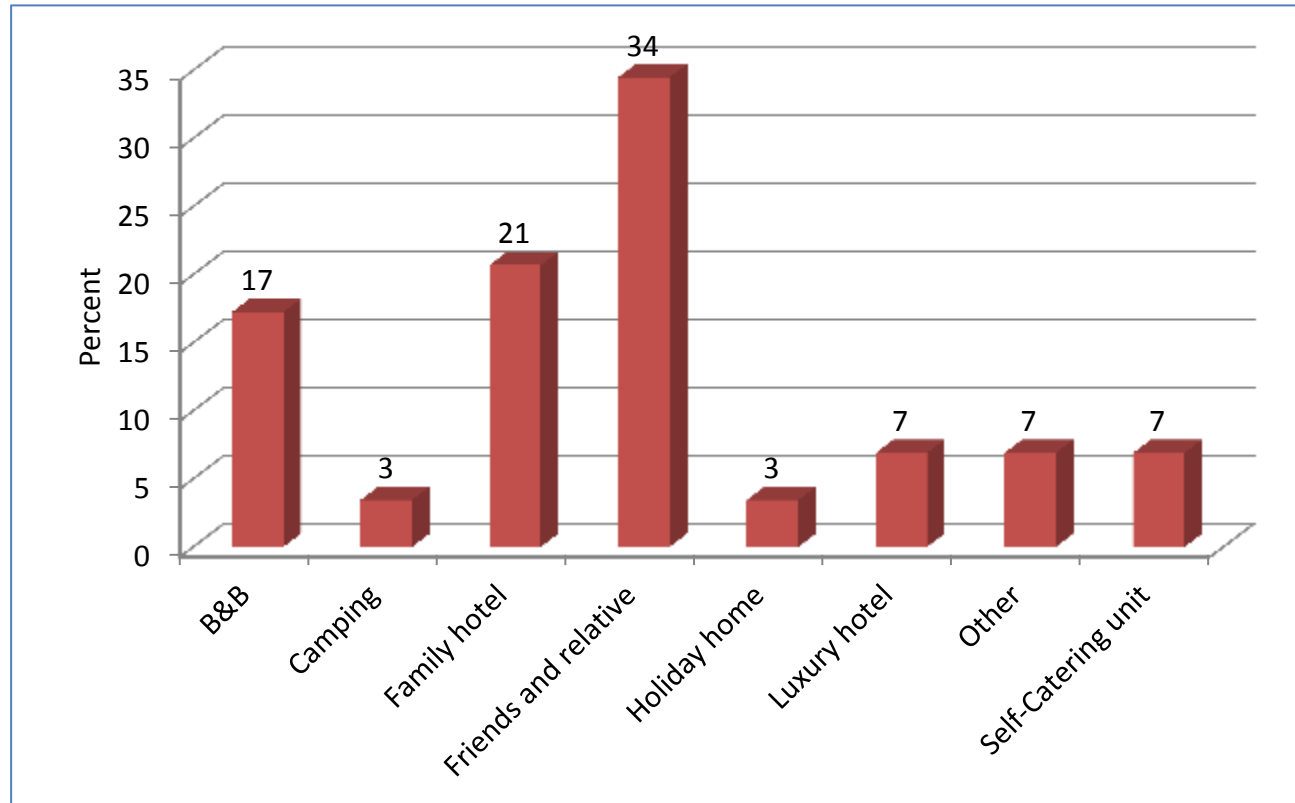
Average Length of Stay



Average Length of Stay	2.6 nights
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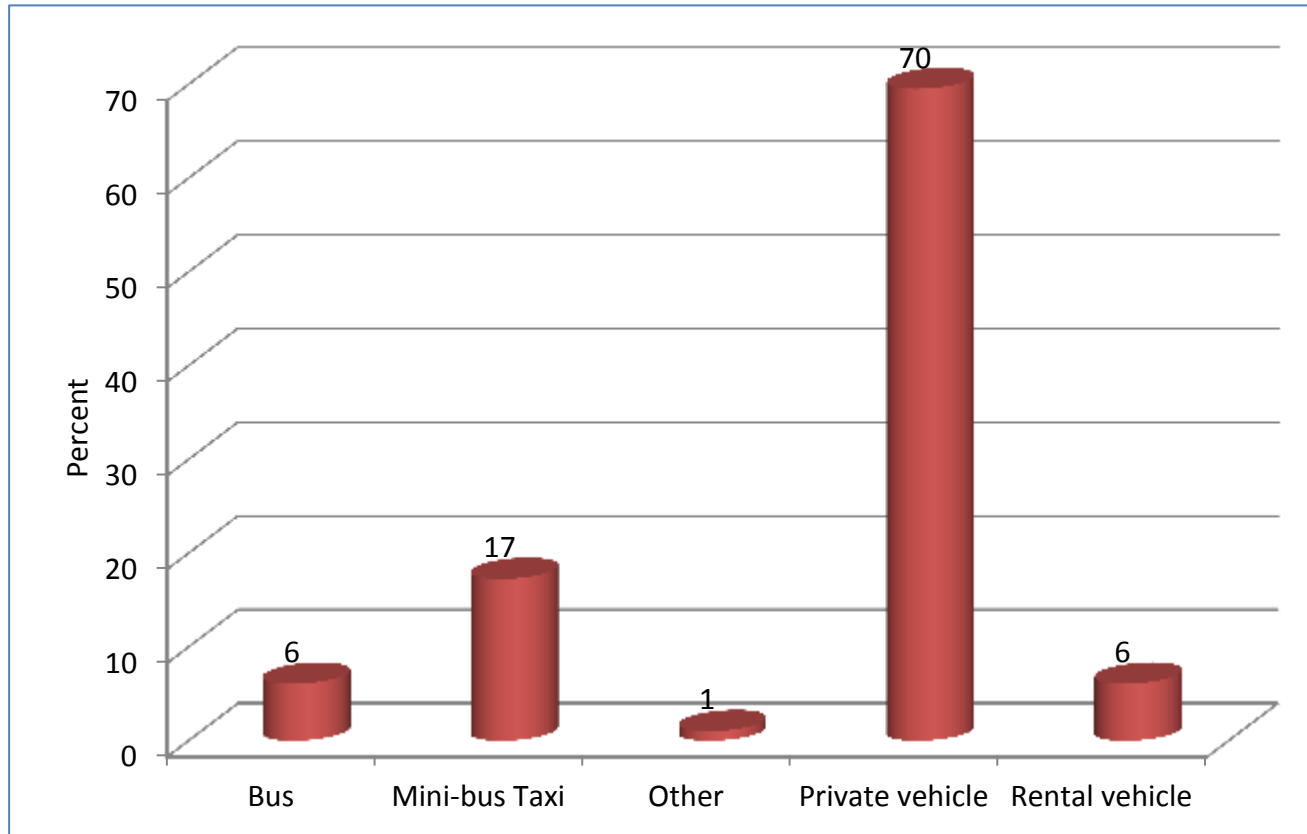
The average length of stay in the area was 2.6 nights. This was positive finding in terms of the event and its effect on the region, because the event was only 1 day long and thus would have a positive impact on the region with regards to spend.

Type of Accommodation: Non-Residents



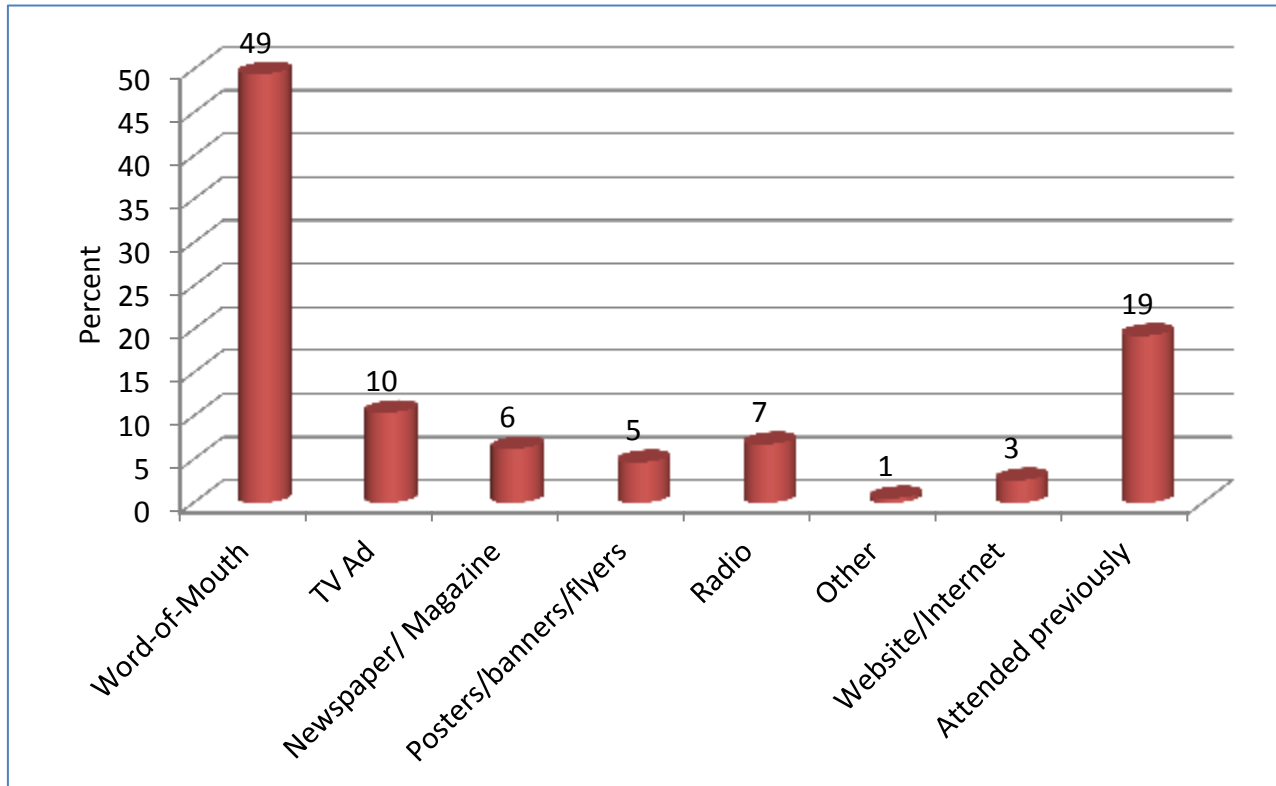
The use of family hotels, VFR and B&Bs were the most popular accommodation options, a further indication of the nature of the participants.

Transport to Event: Non-Residents



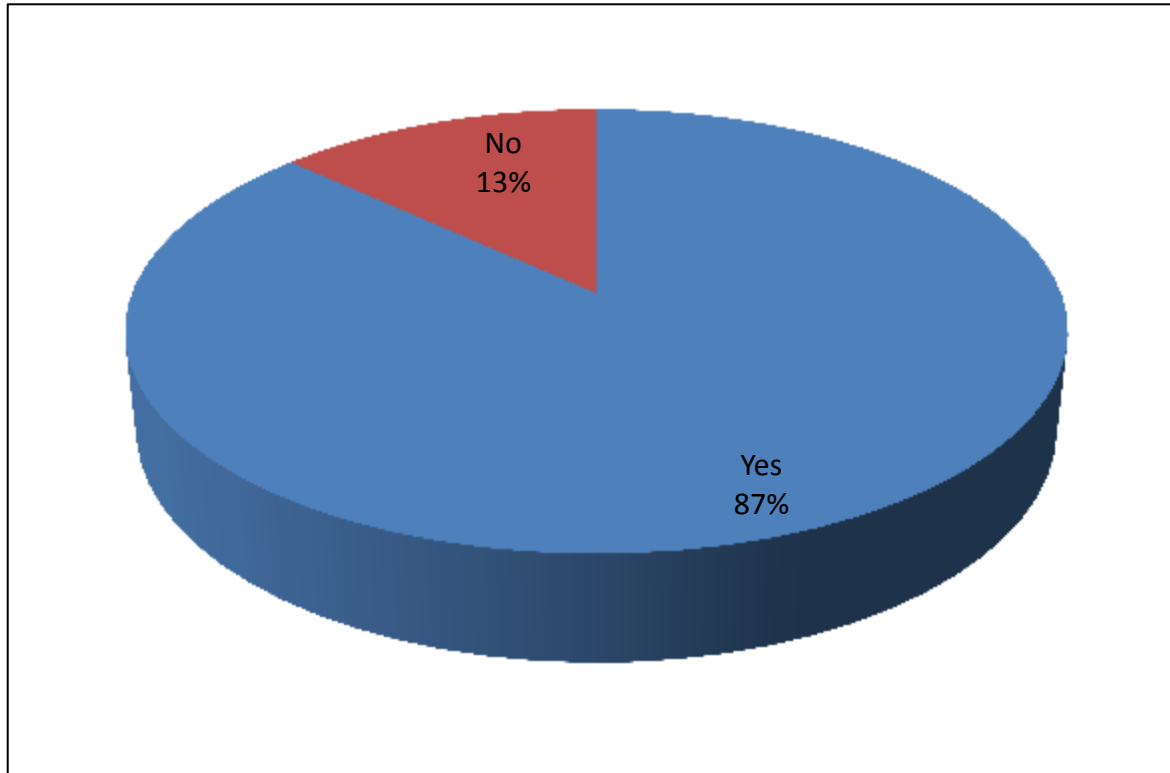
A large majority of respondents used private vehicles to attend the event. The organizers also provided transport for participants returning to the start of the race.

Influence to Attend



Word-of-mouth was the most significant method of influencing people to attend or participate in the event.

Information Satisfaction

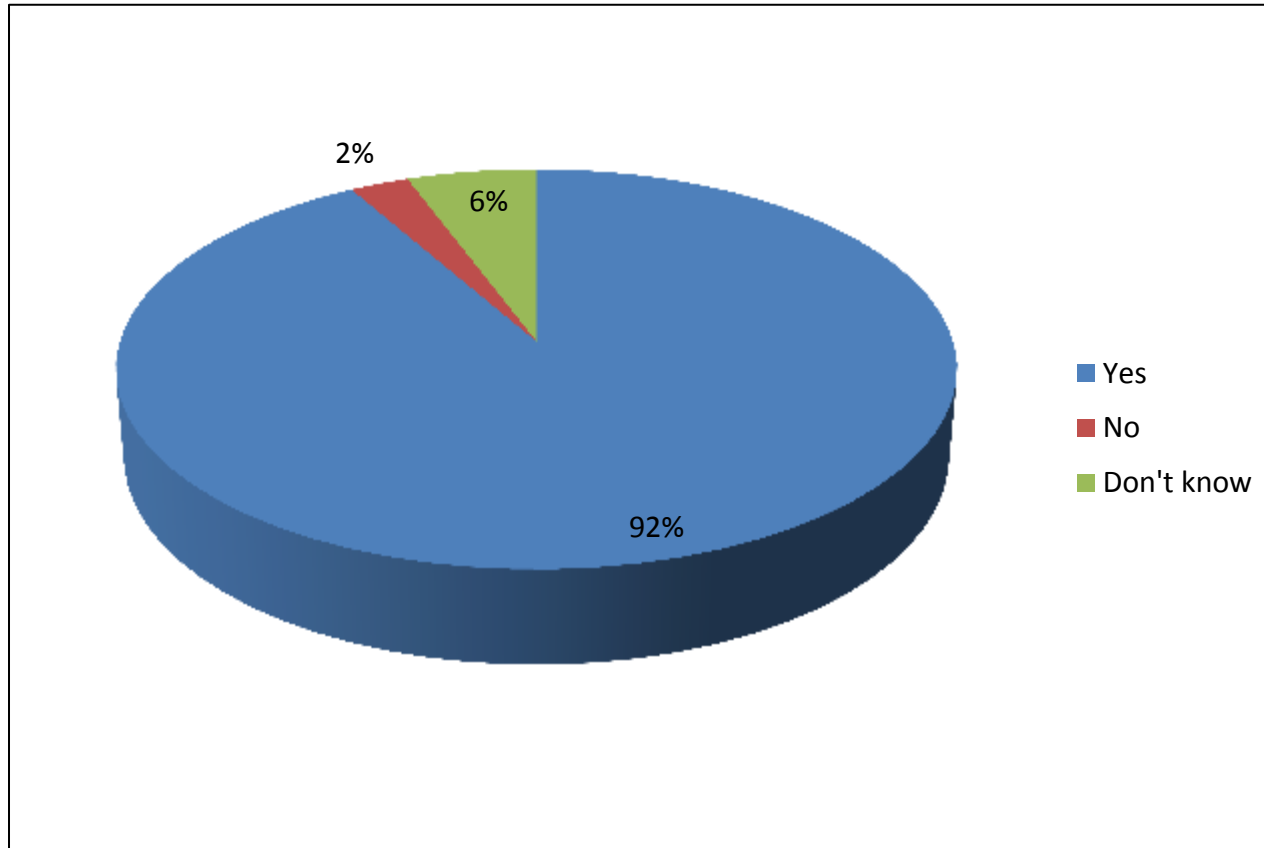


Areas of dissatisfaction were:

- Directions to start not clear
- Lack of communication
- Shuttle service confusing

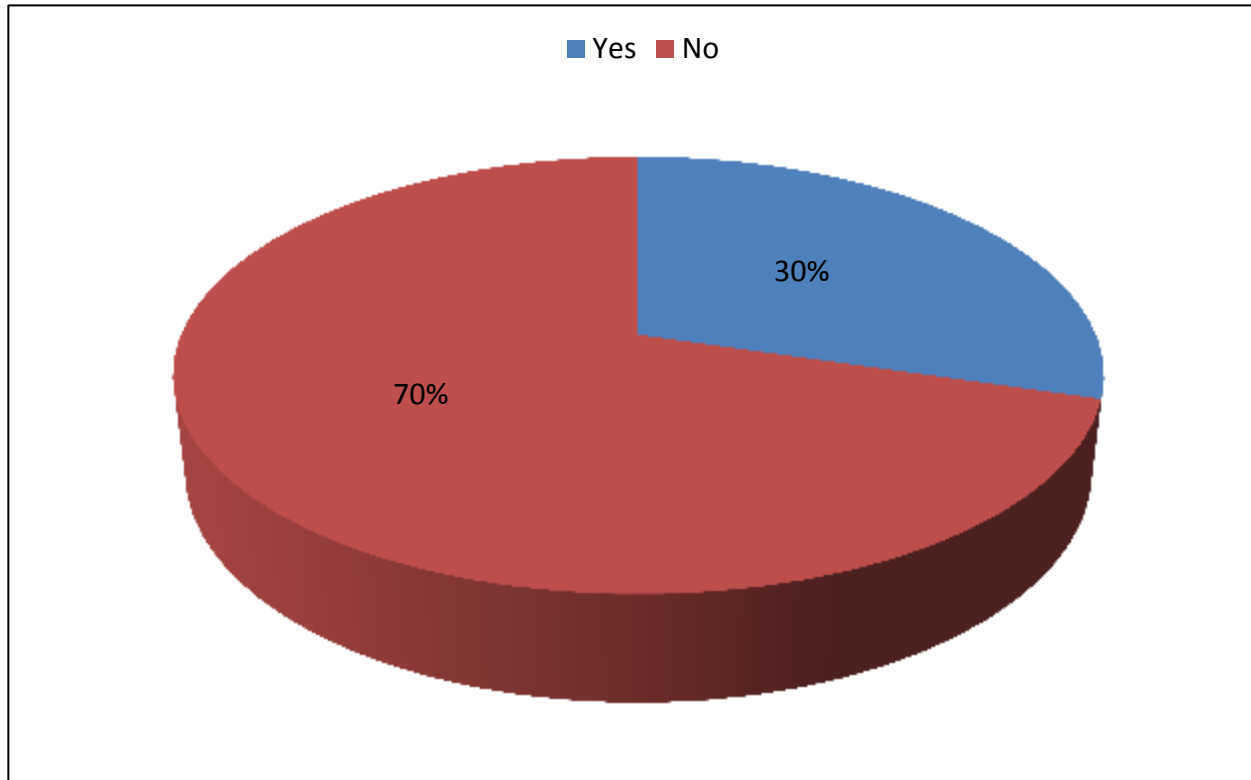
About 87% of the respondents indicated that information provision was satisfactory.

Future Attendance



92% of the respondents indicated that they would attend the event in the future. This bodes well for the event and the destination.

Attended in Previous Years?



In terms of the previous slide where 92% of the respondents indicated that they would return to the event in the future, this slide is a good indication that there should be increased participation in future events.

Experience Rating



81% of the respondents indicated that their experience at the event was 'good' or 'excellent'.

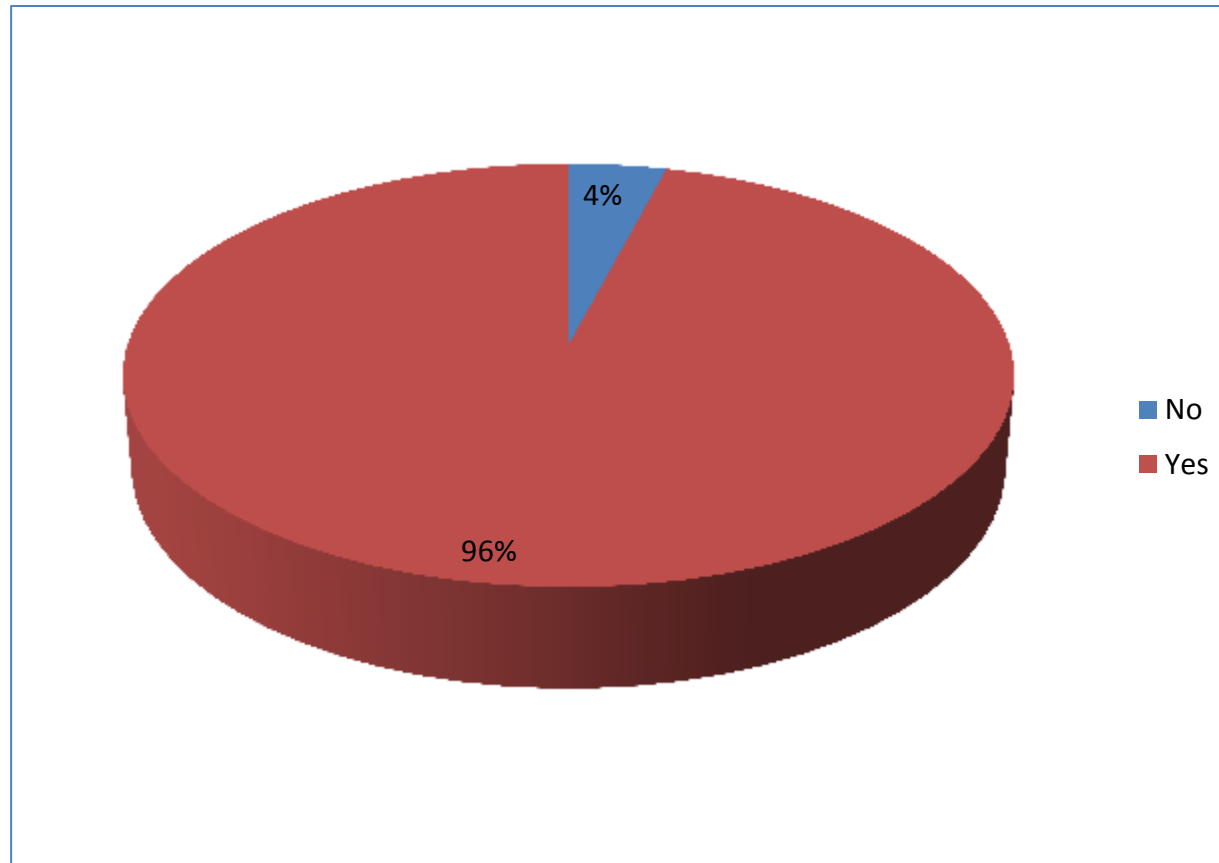
Marketing Improvement Suggestions



Many respondents were of the view that the event was well marketed. However, the following suggestions were made:

- More advertising on radio, social media and TV is needed
- More advertising in rural areas is also required

Recommend the Event to Family and Friends?



96% of the respondents indicated that they would recommend the event to family and friends. This indicates that the event was enjoyed by participants and spectators alike.

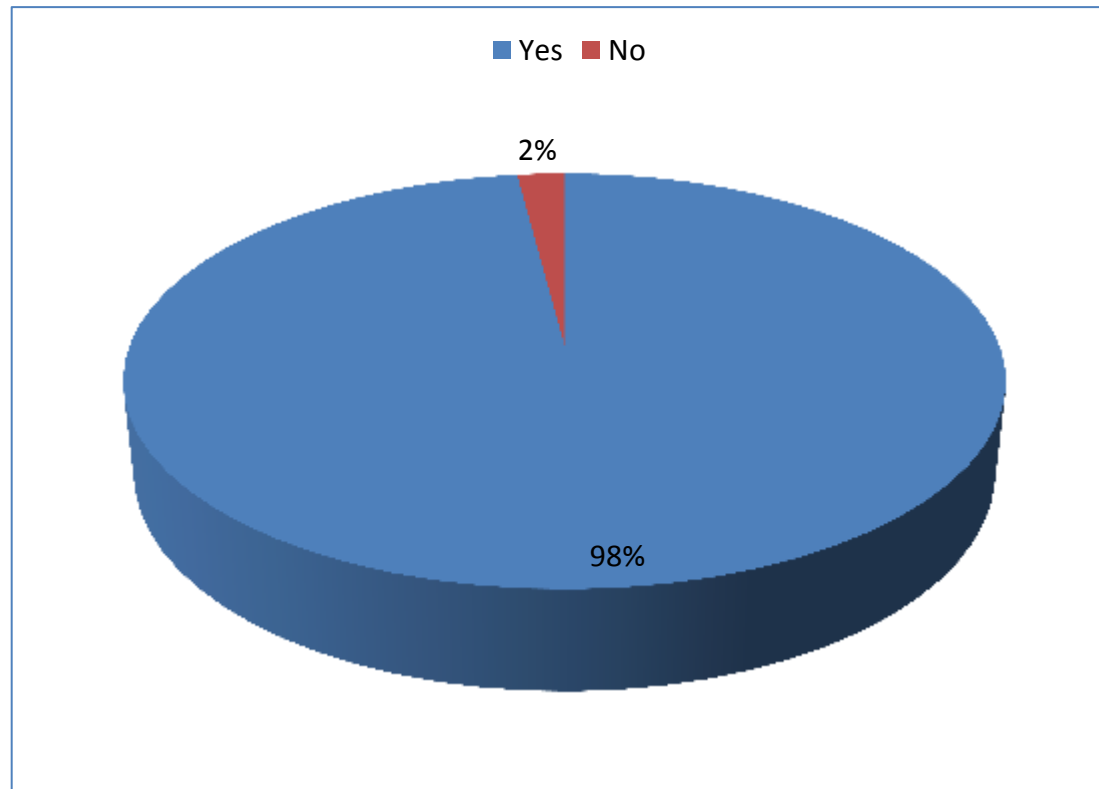
Recommend the Event to Family and Friends? (cont'd)



The event was recommended for the following reasons:

REASON	COUNT
AMAZING EVENT/GOOD RACE	38
GOOD FOR HEALTH	34
FUN	24
FAMILY EVENT	14
ENTERTAINING	13
AWESOME EXPERIENCE	12
ENJOYABLE	11
TO HONOUR NELSON MANDELA	7
HISTORY AND THE BEST RACE IN KZN	4
MEET NEW PEOPLE	4
WELL ORGANISED	4
GOOD ATMOSPHERE	3
CHALLENGING	2
GOOD OUTING	2
BEAUTIFUL SCENERY	2
LOVE OF SPORT	2
BRINGS PEOPLE TOGETHER	1
EXCITING	1
FOR CHARITY	1
LOVELY PLACE	1

Recommend KZN to Family and Friends?



98% of the respondents indicated that they would recommend KZN to family and friends. This is a positive finding, as events are good showcases for destinations.

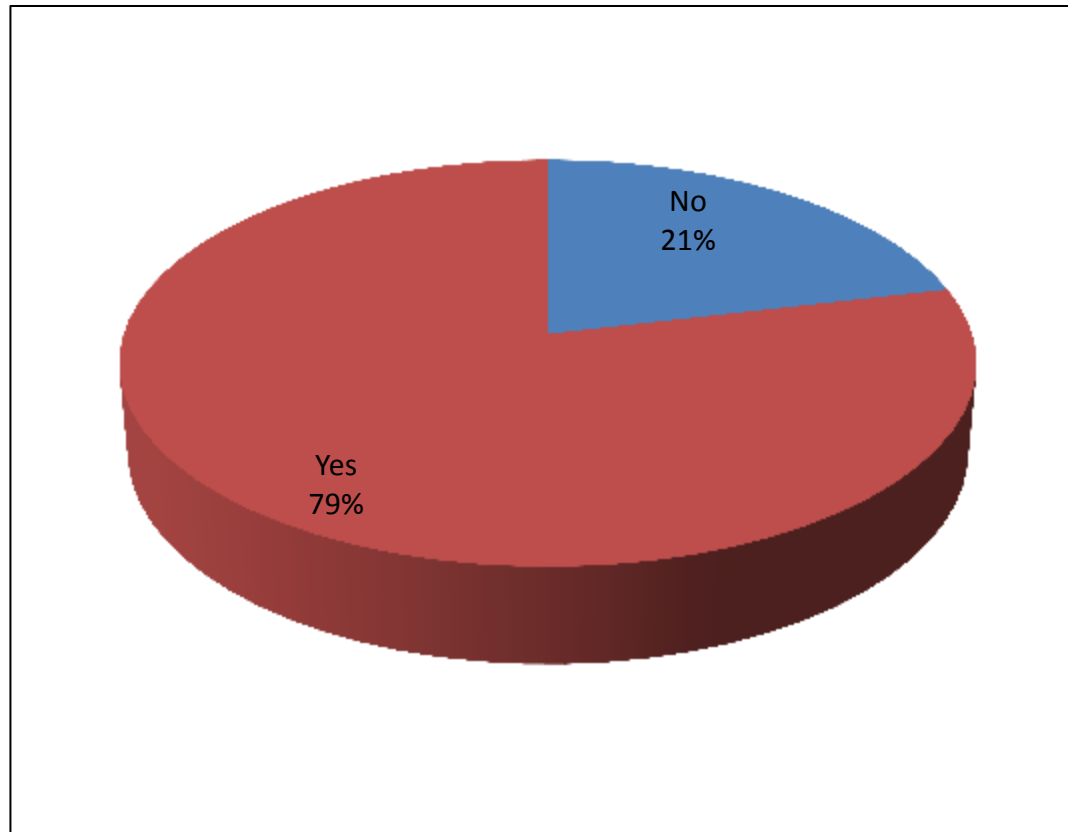
Recommend KZN to Family and Friends? (cont'd)



The province was recommended for the following reasons:

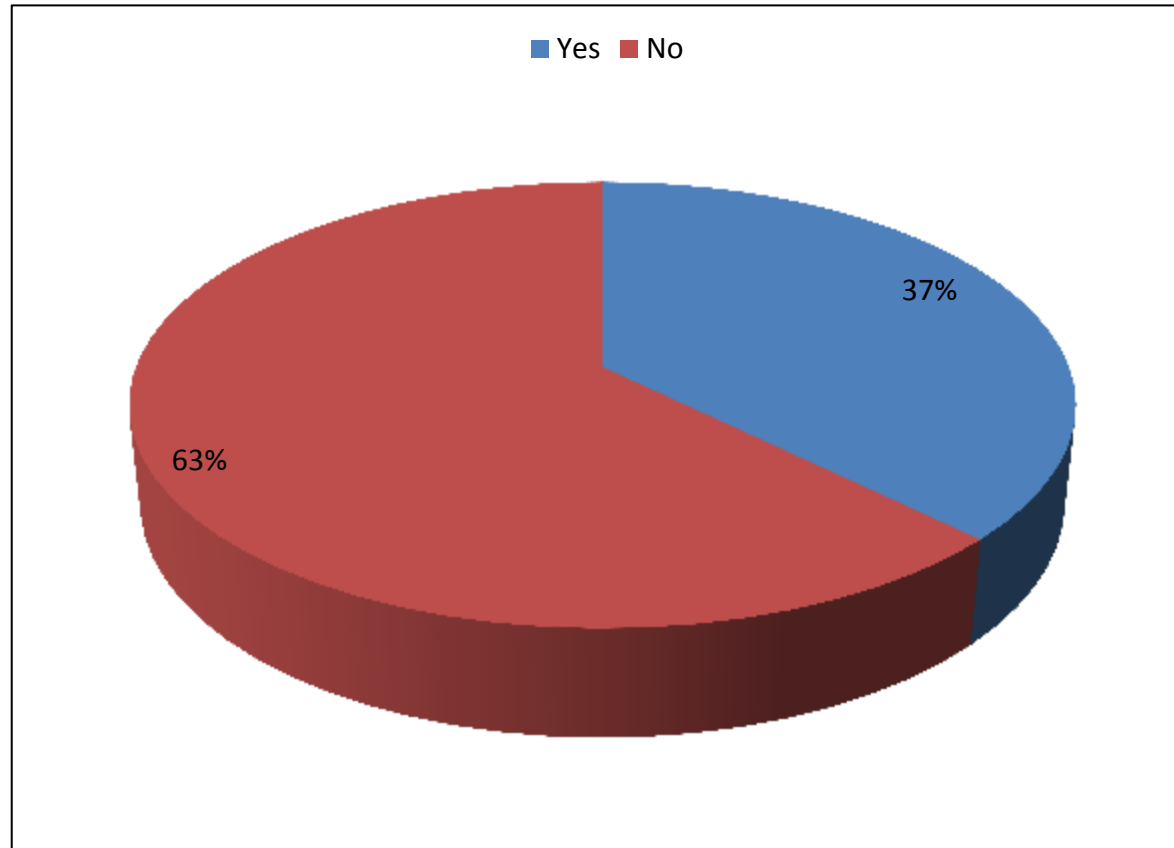
REASON	COUNT
ATTRACTIONS	37
BEST PROVINCE/PLACE	28
BEAUTIFUL PROVINCE	26
BEST WEATHER	22
GOT IT ALL/LOTS TO DO	19
FRIENDLY PEOPLE/PROVINCE	13
NATURE	13
BEACHES	9
HISTORY	4
BEAUTIFUL SCENERY	3
KZN INFRASTRUCTURE IS GOOD	3
GREAT EXPERIENCE	2
ENJOYABLE	1
ENTERTAINMENT	1
EXPERIENCE HISTORY	1
GOOD MALLS	1
MOSES MABHIDA STADIUM	1
NIGHT LIFE	1
MOUNTAINS	1

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



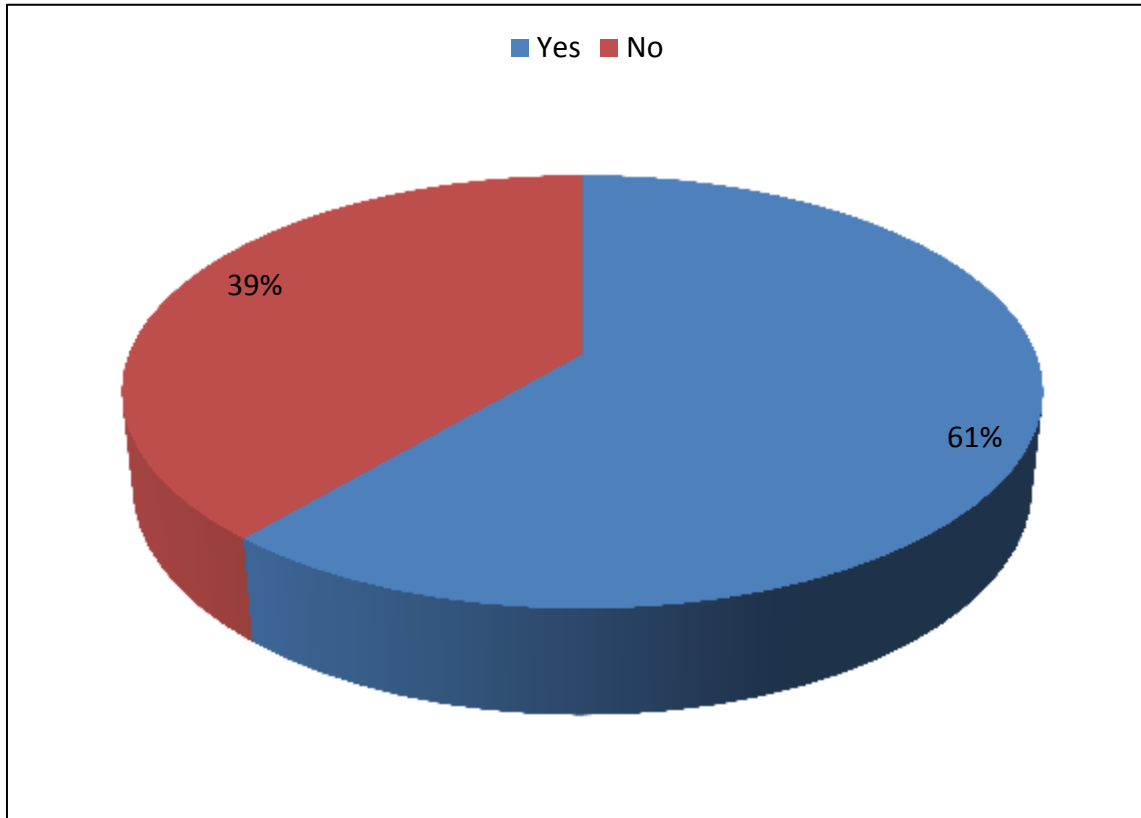
About 79% of the respondents indicated that they would return to KwaZulu-Natal for a holiday in the next 12 months.

Familiarity with Zulu Kingdom slogan



63% of the respondents indicated that they were familiar with the slogan of TKZN.

Noted Zulu Kingdom logo?



61% of the respondents indicated that that noted the TKZN logo.

Where Zulu Kingdom Logo Noted



SOURCE	COUNT
TELEVISION	25
POSTERS	19
INTERNET	10
AIRPORT	6
USHAKA MARINE WORLD	5
NEWSPAPER	4
TOURIST JUNCTION	4
DURBAN	3
MAGAZINE	3
CAR BRANDING	2
MALL	2
MEDIA	2
SCHOOL	2
TOURIST INFORMATION CENTRE	2
T-SHIRTS	2
BANNERS	1
BILLBOARDS	1
ICC	1
PAMPHLETS	1
RADIO	1
THE BEACH FRONT	1
TOURISM INDABA	1
UKZN UNIVERSITY	1

The TKZN logo was mostly noted on television, poster and the internet.

Average Spend



	2014
Average total spend	R684.00
Non-residents spend	R822.00

Estimated Economic Impact: Resident and Non-resident Participants



Non-resident Participants

- $N = 4\,433$ ($7\,267^* - 2\,834$)
- Mean: R894
- Estimated direct spend **excluding** Std Error = R3 962 868
- Estimated direct spend of at least R2 630 515 and as much as R4 812 026

Non-resident spectators

- $N = 4\,500$ (15 000 – 10 500 local spectators)
- Mean: R429
- Estimated direct spend **excluding** Std error = R1 931 096
- Estimated direct spend **taking** Std error of mean into account: At least R1 356 097 and as much as R2 507 900.

*This is based on the 10km, 21km and 42km events that took place of Sunday 31st August.

Estimated Economic Impact: Participants and Non-Resident Spectators

	2014
Non-resident participants	Low: R2 630 515 Middle: R3 962 869 High: R4 812 025
Non-resident spectators	Low: R1 356 097 Middle: R1 932 000 High: R2 507 900
Direct spend	*At least R3 986 612 As much as R7 319 925
Total spend	**At least R7 973 224 As much as R14 639 850

Note:

Local resident respondent's spend was not included in the direct and total spend calculations as per international best practice.

*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 as per previous studies.

Beyond Tourism Impacts



	2014
Income from Entry Fees	R830 000 was received from entry fees. The leakage was estimated to be 10%. This means that just over R6mn was spent in the province.
Total Race Expenses	R12.5mn 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, medals, t-shirts, medical, structures and transport etc.
Jobs created	550 temporary and 3 permanent jobs.
Media Exposure	Print, radio, online and social media. A minimum of 35 press releases prior to the event.

Source: Mandela Day Marathon Organizers

Findings



1. The 2014 Mandela Day Marathon attracted people from many different age groups. It was mainly attended by people from the age groups of 18-29 (30%), 30-39 (39%) and 40-49 (19%) age categories.
2. 73% of the respondents were in the area specifically for the event. This suggests that the Mandela Day Marathon served as a draw card for people to be in the area. However, only 36% of the respondents were from outside the area.
3. The average group size was 3.1. This is consistent with the nature of the event where people come to support their friends/family members who were participating.
4. The average length of stay was 2.6 nights.
5. More respondents stayed with VFR (34%), family hotels (21%) and B&Bs (17%).
6. 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.
7. 87% of the respondents were satisfied with information that was provided through various media mentioned above. Areas of dissatisfaction related to *a lack of communication, shuttle problems, the need for more information and directions to the parking.*

Findings (cont'd)



8. It appears that many respondents were satisfied with the event. This was shown by the level of planned future attendance as 92%.
9. 30% of respondents were attending for the first time suggesting that the event is still able to attract new people.
10. Over 80% of respondents had a 'good' or 'excellent' experience at the event. This may have contributed to the degree of future attendance that was expressed as indicated in point 8 above.
11. 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 use of social media
 - Advertising in rural areas
12. The majority of respondents (99%) said they would recommend the event to family and friends. They cited the following reasons for doing so:
 - A good race
 - Festive atmosphere
 - Fun
 - Family event

Findings (cont'd)



13. About 79% of the respondents indicated that they would return to KwaZulu-Natal for a holiday in the next 12 months.
14. 63% of the respondents were familiar with the Zulu Kingdom slogan.
15. The noting of the logo was 61%. The logo was noted on television, posters and the internet.
16. The researcher observed that the marathon finishers had to wait for long periods before getting the shuttle back to the start.
17. Another observation was that providers of refreshments to the public set up their stalls very late (after 8:30am), considering that race participants and spectators were at the start venue from 6am

Recommendations



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

- 1) The communication regarding the parking facilities at the start needs to be communicated in a different manner, because participants did not seem to be aware of the directions.
- 2) The availability of water for the participants at the finish needs to be improved.
- 3) The availability of food and beverages need to be improved at the finish.
- 4) The provision of food and beverages also need to be improved before the start of the event.
- 5) Far more variety in terms of food is required, and healthy options should also be on offer.
- 6) All of these improvements would assist in attracting more people from outside the area to this event, thus increasing the economic value of the event to the area.