

Comrades 2008 Impact Assessment: Top Line Summary Report

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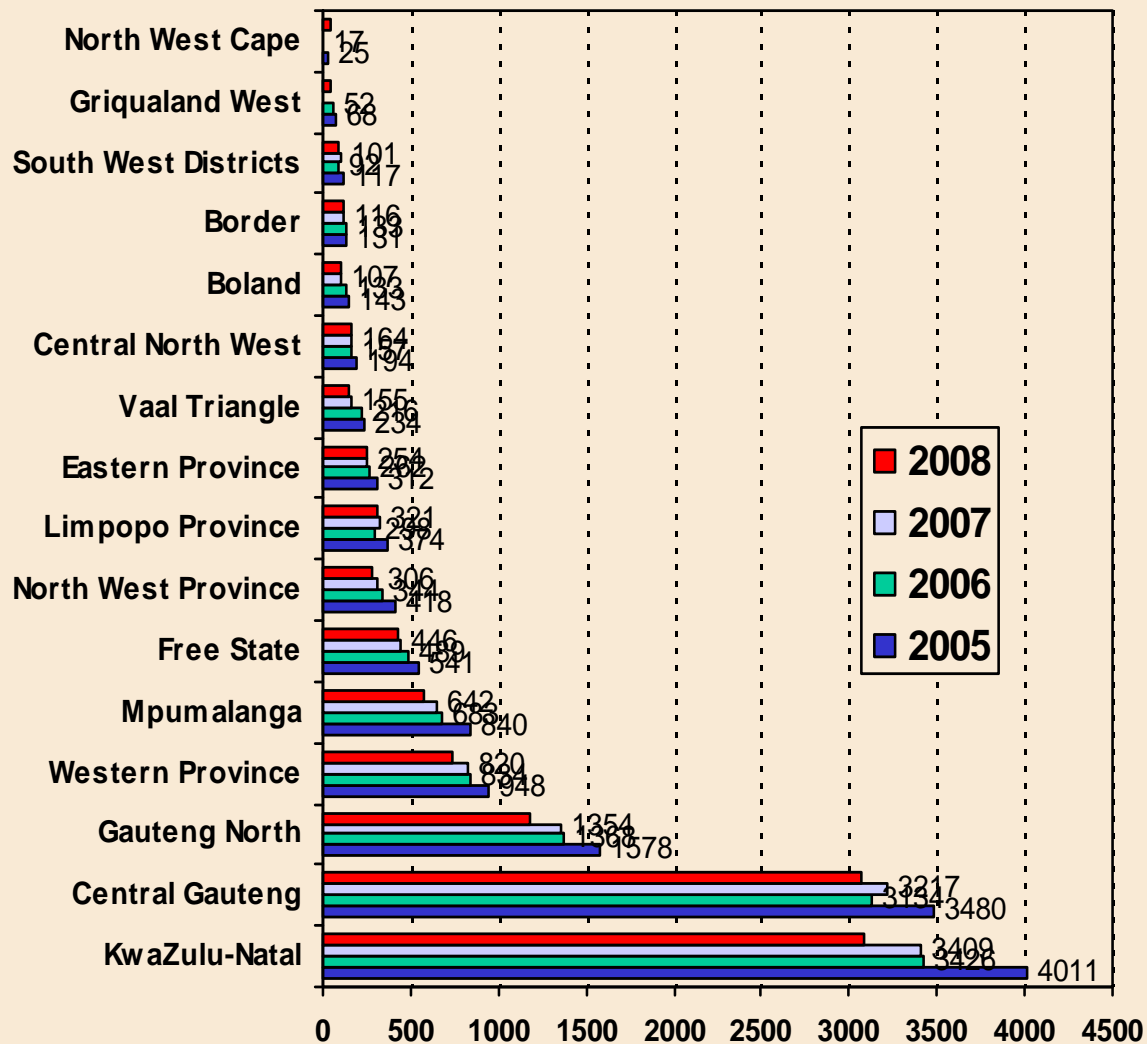
Methodology

- Primary data:
 - Face to face survey – 274 respondents
 - Stratified probability sample – 216 participants and 58 spectators/other.
 - Respondents systematically selected over 3 days before event at the "Comrades Experience" and at the finishing point on the day of event.
- Secondary data: Comrades House, Two Oceans Marathon Association



Nature and Extent of Comrades Participants

South African Regions



Nature and Extent of Comrades Participants

Country	Number 2007	% (2007)	Number 2008	% (2008)
<i>KZN Only</i>	3409	29	3 088	27.62
South Africa (including KZN)	11481	96.26	10 631	95.10
United Kingdom	84	0.70	116	1.0
Australia	47	0.39	74	0.66
United States	48	0.40	59	0.53
Zimbabwe	43	0.36	49	0.44
Brazil	-	-	44	0.39
Lesotho	22	0.18	32	0.29
Germany	24	0.20	31	0.28
Canada	-	-	14	0.13
Swaziland	13	0.11	14	0.13
Japan	12	0.10	14	0.13
Ireland	-	-	11	0.10
Russia	-	-	9	0.08
Switzerland	14	0.12	9	0.08
France	-	-	8	0.07
Namibia	-	-	7	0.06
Netherlands	-	-	6	0.05
United Arab Emirates	-	-	5	0.04
New Zealand	-	-	4	0.04
Israel	-	-	3	0.03
Chile	-	-	3	0.03
Zambia	-	-	2	0.02
Argentina	-	-	2	0.02

Nature and Extent of Comrades Participants (cont'd)

Country	Number 2007	% 2007	Number 2008	% 2008
Austria	-	-	2	0.02
Belgium	-	-	2	0.02
Botswana	-	-	2	0.02
Ethiopia	-	-	2	0.02
Finland	-	-	2	0.02
Hong Kong	-	-	2	0.02
Indonesia	-	-	2	0.02
Malawi	-	-	2	0.02
Portugal	-	-	2	0.02
Saudi Arabia	-	-	2	0.02
Cameroon	-	-	1	0.01
China	-	-	1	0.01
Denmark	-	-	1	0.01
Kenya	-	-	1	0.01
Malaysia	-	-	1	0.01
Philippines	-	-	1	0.01
Poland	-	-	1	0.01
Spain	-	-	1	0.01
Sweden	-	-	1	0.01
Thailand	-	-	1	0.01
Trinidad & Tobago	-	-	1	0.01
Uganda	-	-	1	0.01
Total	11837	100	11 179	100



Nature and Extent of Two Oceans Ultra & Half-Marathon Participants

Participants	2007 Ultra	2007 Half	2008 Ultra	2008 Half
Western Province	1804	5876	1639	6216
%	24%	55%	24%	55%
Non-Western Province	5377	4366	4639	4593
%	70%	41%	69%	41%
Other African Countries	123	187	79	134
%	1%	1%	1%	1%
International	352	323	336	270
%	5%	3%	5%	2%
Total	7656	10752	6693	11213

Other Significant International Marathons

	2007	2006
London Marathon	35699	
% British	93%	
Foreign	7%	
New York Marathon (world's biggest marathon)		37932 Finishers
% USA		50%
% Foreign		50%



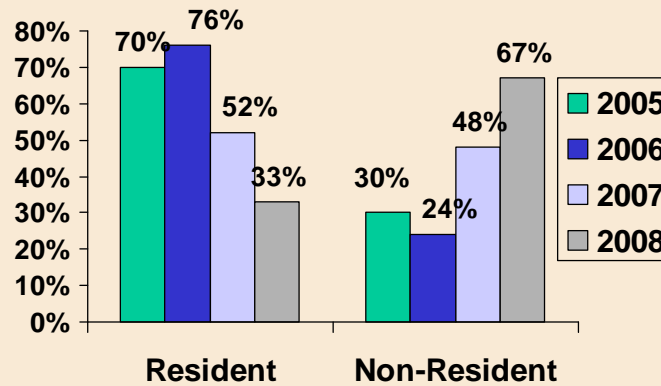
Prize Money Comrades vs other similar events

	2007
Comrades	R1,030,000
Two Oceans	R765,250
London Marathon	±\$300,000 (R2mn)
New York Marathon (world's biggest marathon)	\$600,000 (R4mn)

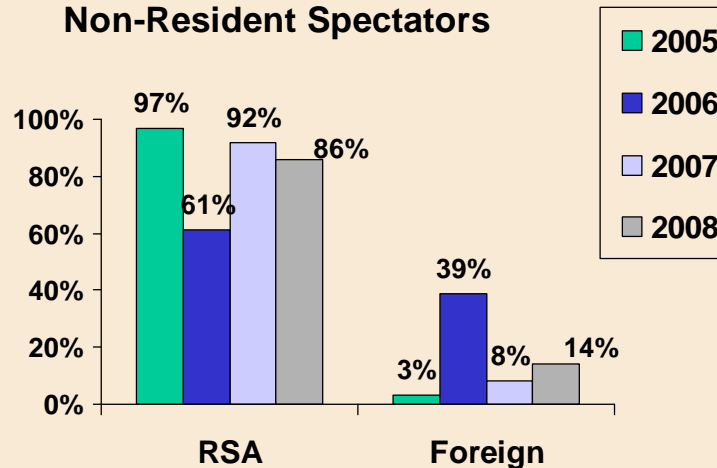


Nature of Spectator Respondents

All Spectators

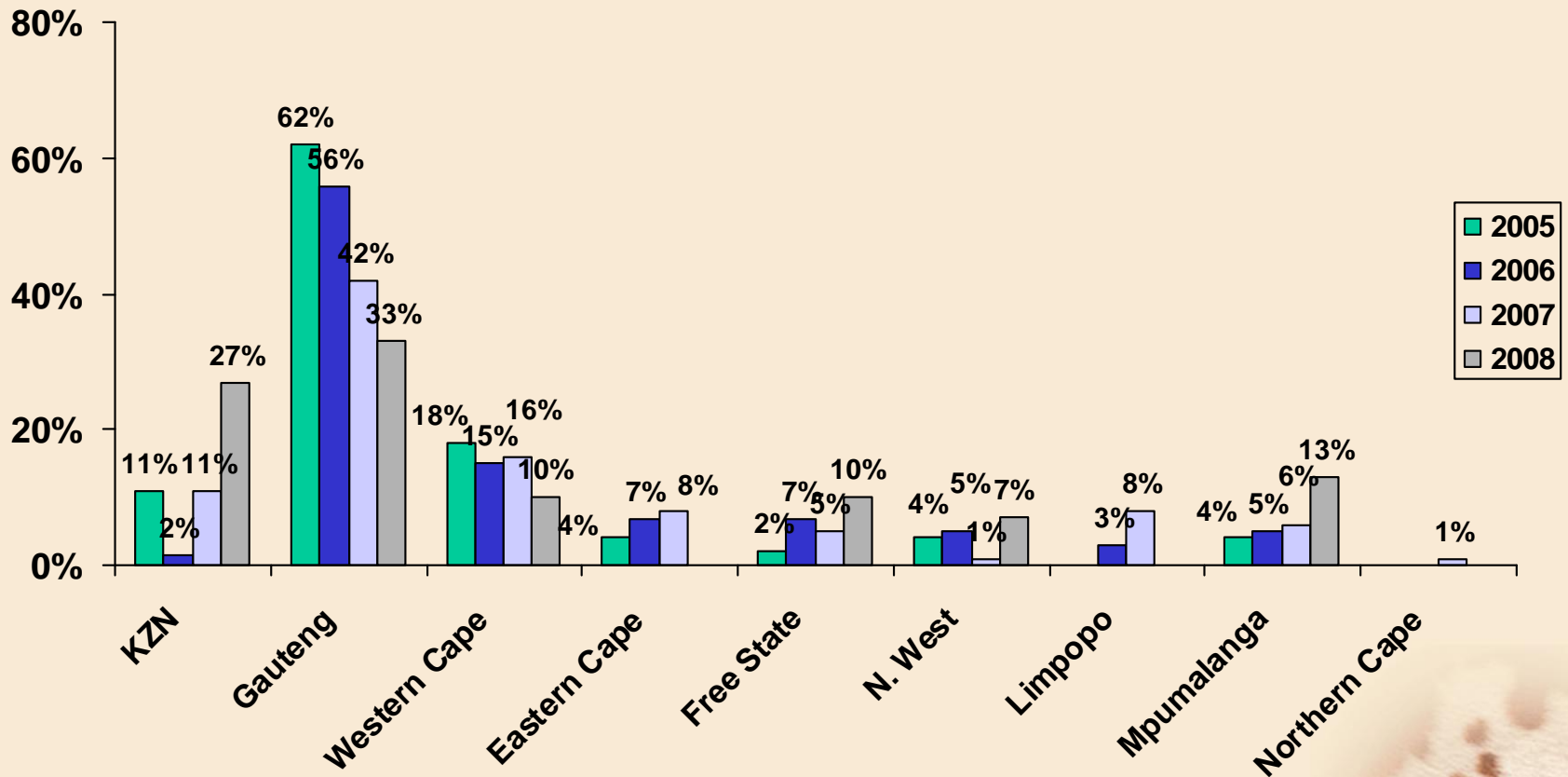


Non-Resident Spectators



Nature of Spectator Respondents (cont'd)

South African Non-Resident Spectators



Average Spend

- Average total spend R6 241.82
- Non-resident participants R8 598.20
- Resident participants R528.93
- Non-resident spectators R3 297.25

Estimated Economic Impact: Participants and Non-Resident Spectators

Non-resident participants

- N= 8 091 (11 179 -3 088)
- Mean: R8 598.20
- Count: 156
- Std Dev: R24 120.70
- Std Error at 95% level of confidence spend between R4 783.32 and R12 413.07
- Estimated direct spend **excluding** Std Error of mean into account = R69,568,036.20
- Estimated direct spend of at least R38,701,917.37 and as much as R100,434,155.03

Resident participants

- N = 3 088
- Mean: R528.90
- Count: 29
- Std Dev: R577.40
- Std Error @ 95% level of confidence spend between R309.26 and as much as R748.53.
- Estimated direct spend **excluding** Std Error of mean into account = R1,633,243.20
- Estimated direct spend of at least R955,022.05 and as much as R2,311,464.35

* 35 800 people attended the Comrades Experience Exhibition



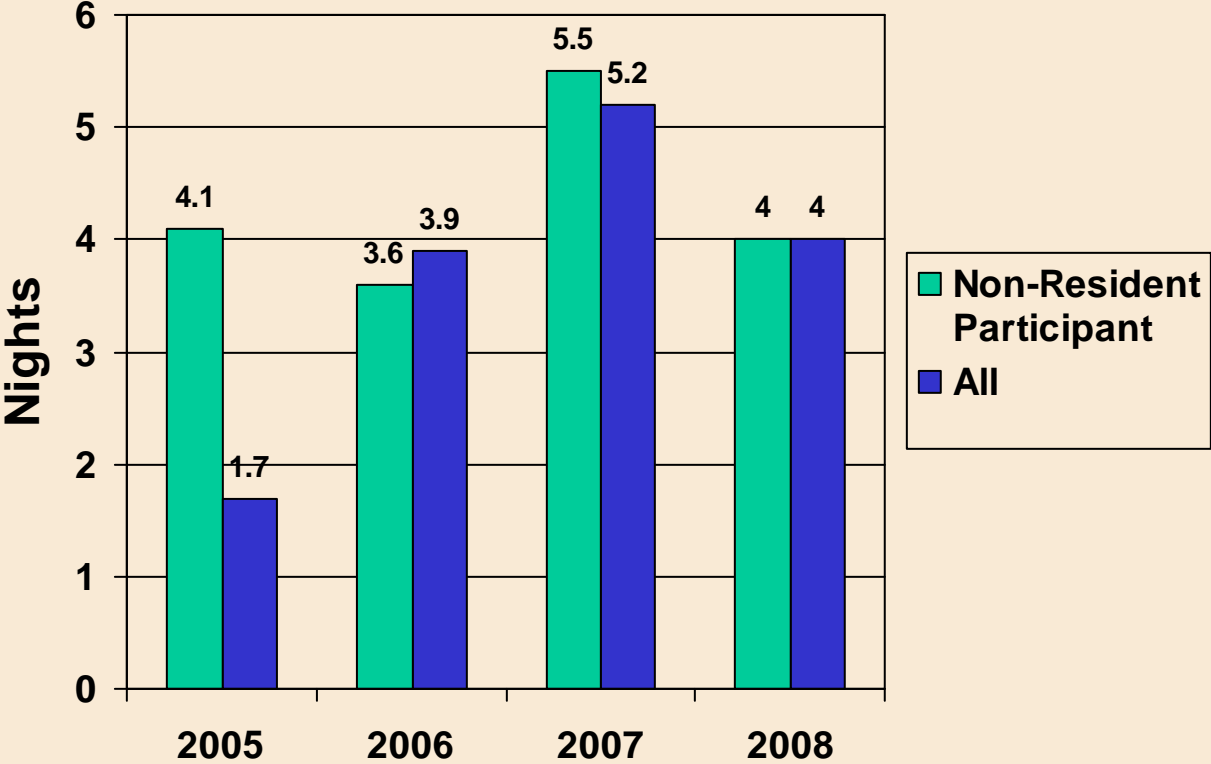
Estimated Economic Impact: Participants and Non-Resident Spectators (cont'd)

Non-resident spectators

- N= 16 496 (35 800 -11 179 x 67%)
- Mean: R 3 297.30
- Count: 31
- Std Dev: R2 948.40
- Std Error @ 95% level of confidence spend between R2 215.81 and as much as R4 378.78.
- Estimated direct spend **excluding** Std error of mean into account = R54,392,260.80
- Estimated direct spend **taking** Std error of mean into account: At least R36,552,137.03 and as much as R72,232,384.57.

- Estimated Total Direct Impact: At least R76,209,076mn and as much as R174,978,003mn
- Estimated Total Impact with a multiplier of 1.42: At least R108,216,887mn and as much as R248,465,764mn

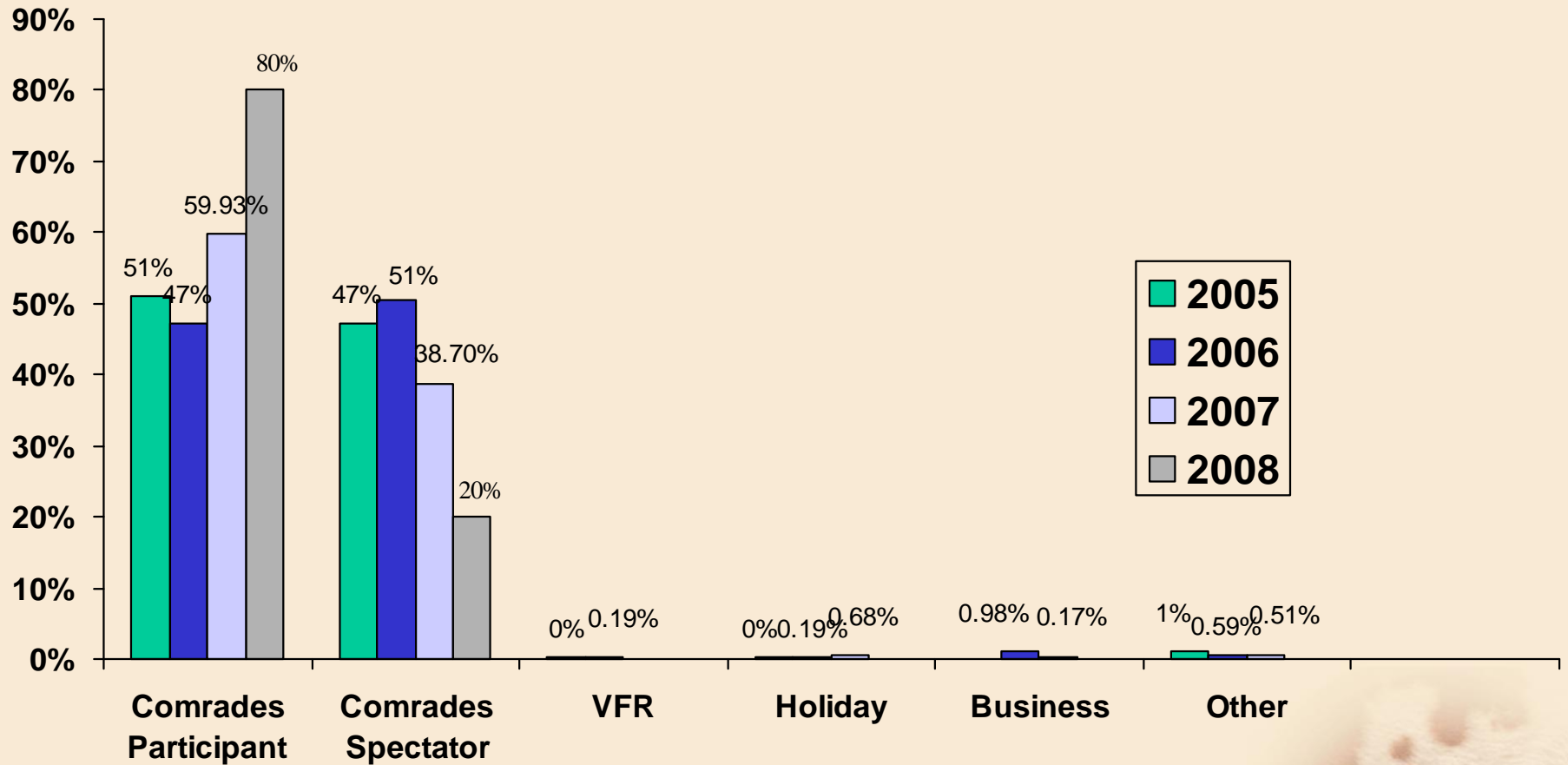
Average Length of Stay



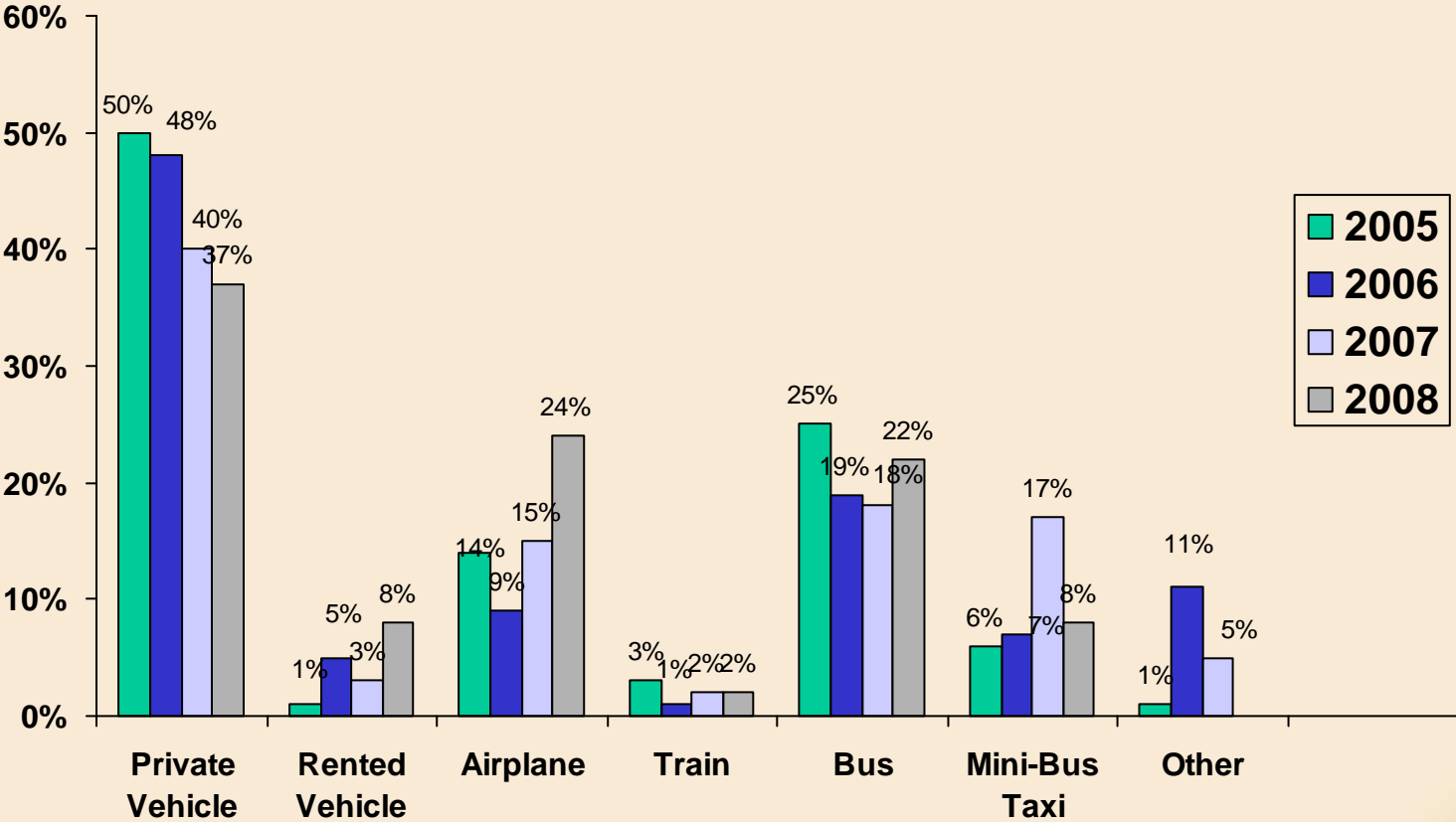
2008	Mode	Median	Range
All	3	5	9



Primary reason for visiting area where event took place

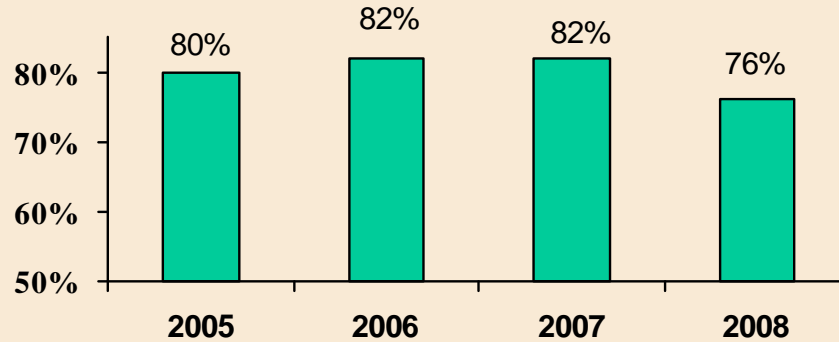


Transport to Event: Non-Residents

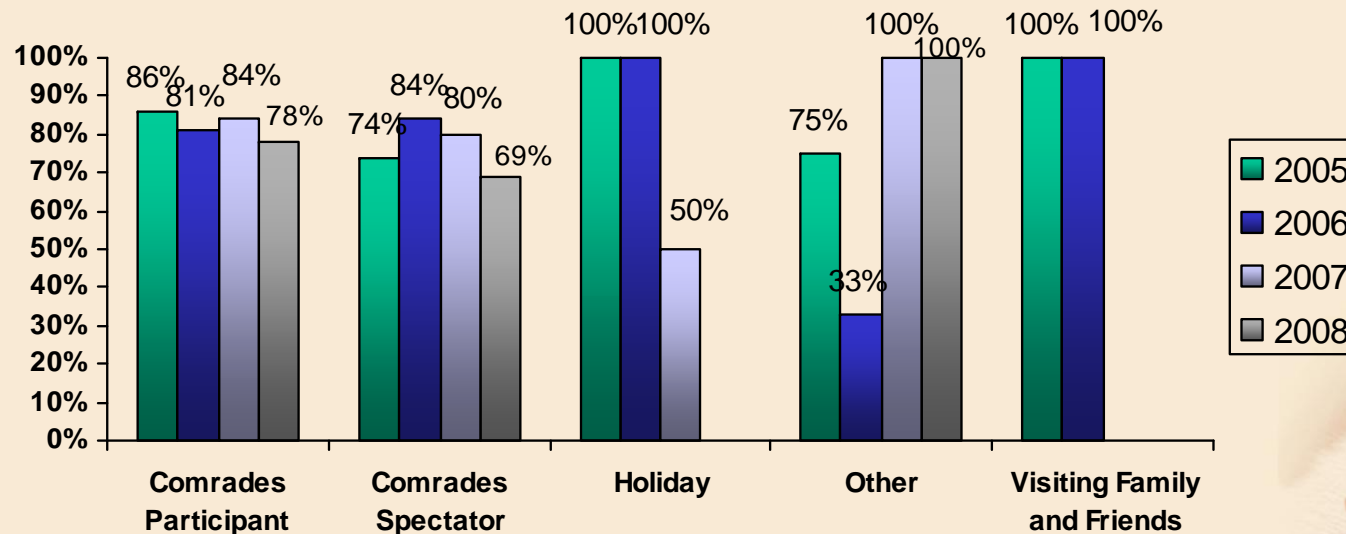


Attended in previous years?

Attended previously

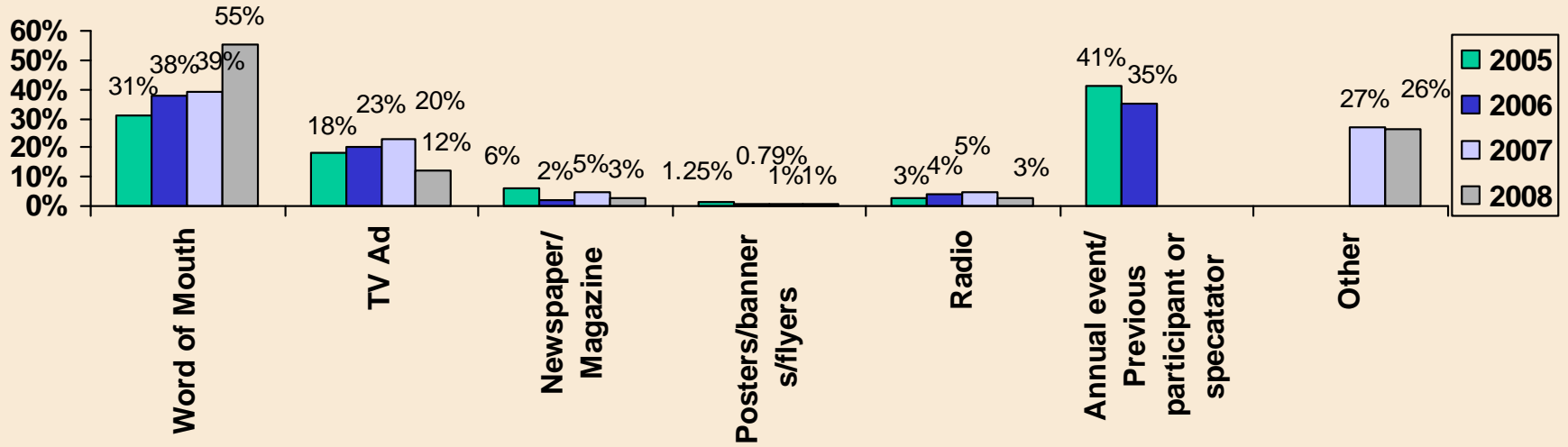


Attended by Purpose of visit



Influenced to attend?

All



By Media

	Newspaper/ magazine				Poster/banner/flyer				Radio				TV Ad			
	'05	'06	'07	'08	'05	'06	'07	'08	'05	'06	'07	'08	'05	'06	'07	'08
Participant %	6	1	5	2	1	1	1	1	3	3	5	3	21	26	24	13
Spectator %	6	4	4	8	1	1	1	-	3	3	5	2	15	16	22	12

Influenced to attend?

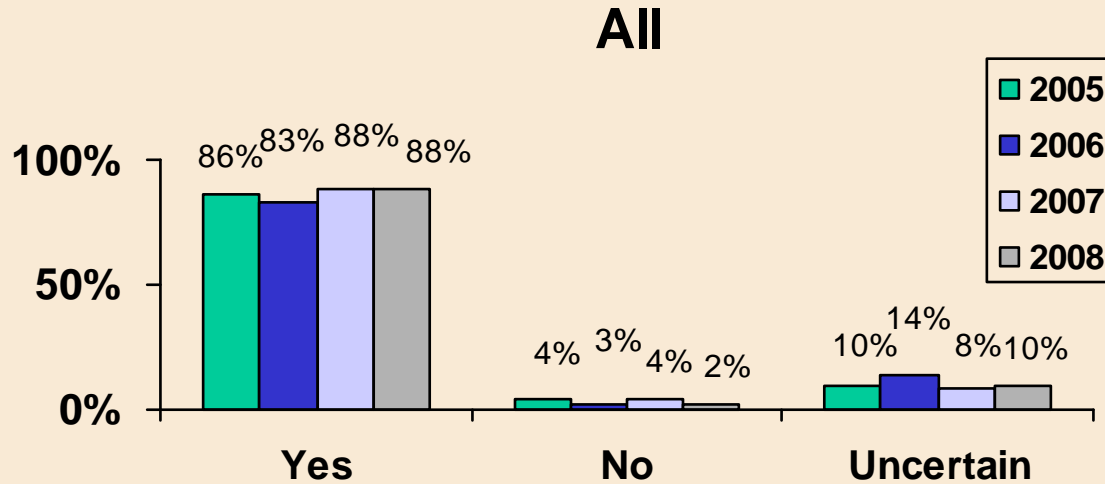
(cont'd)

By Media

	Word-of-mouth				Annual event/prev. partic/spectr				Other
	'05	'06	'07	'08	'05	'06	'07	'08	'08
Participants %	20	29	32	56	47	39	33	-	25
Spectator %	43	46	49	54	33	30	19	-	25

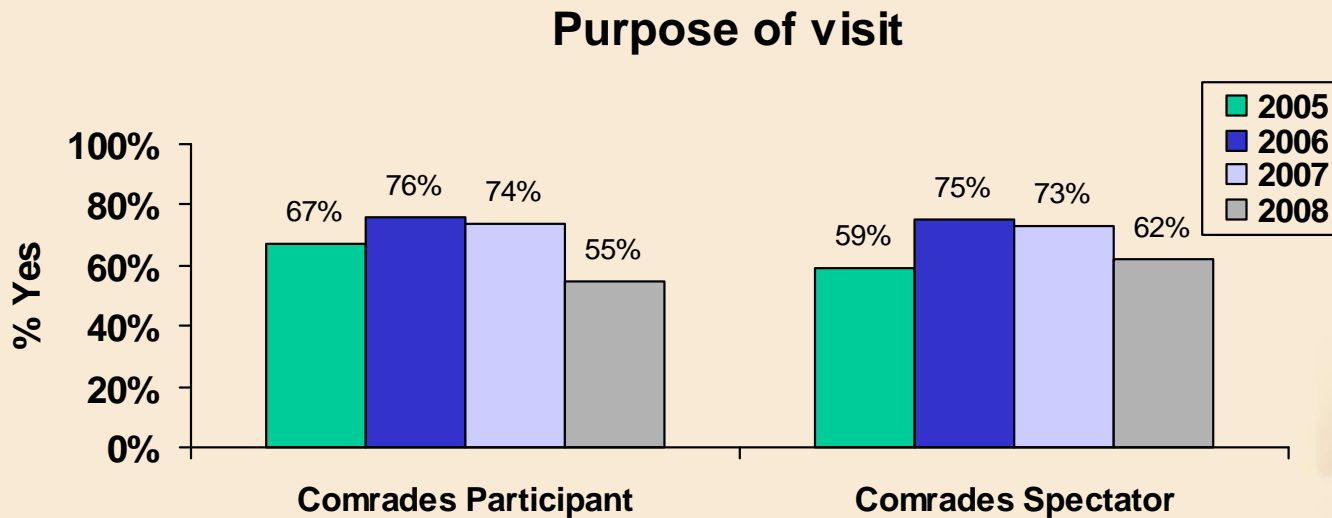
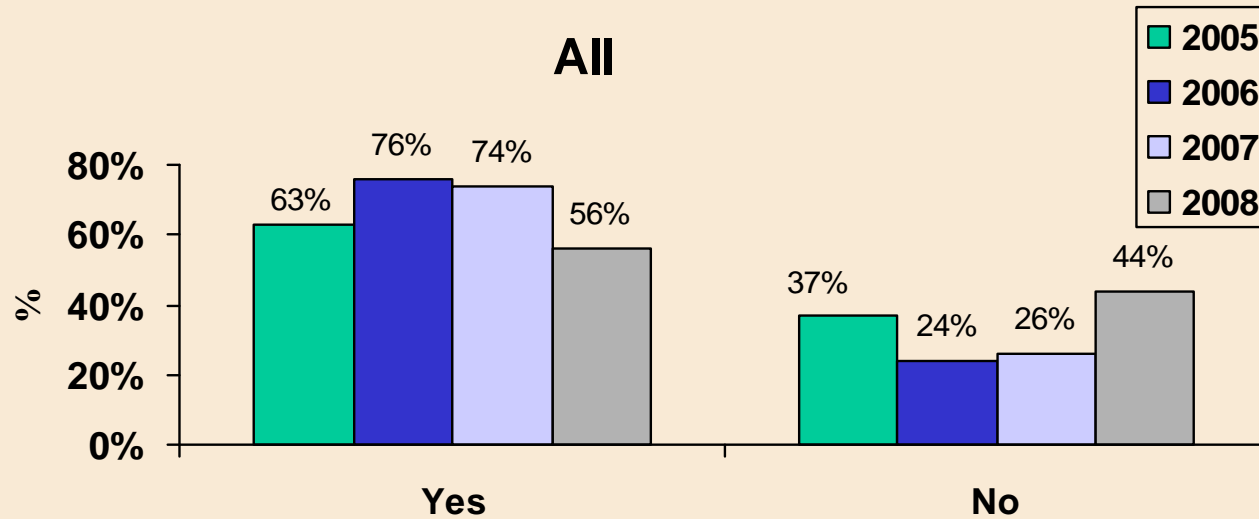


Attend again?

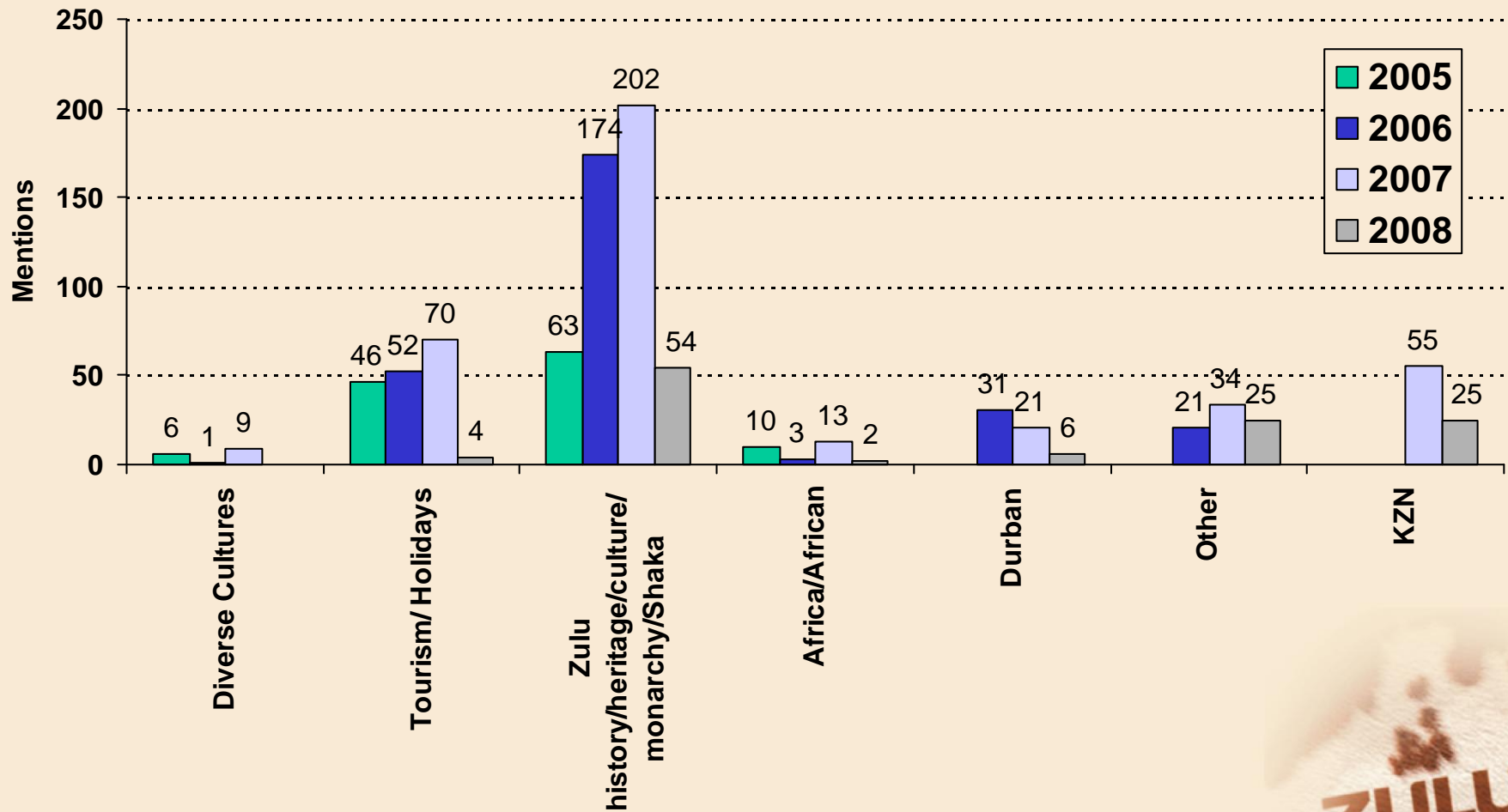


	Participant				Spectator			
	2005	2006	2007	2008	2005	2006	2007	2008
Yes	86%	85%	91%	88%	86%	83%	83%	84%
No	3%	0%	4%	3%	5%	4%	4%	-
Uncertain	11%	15%	5%	9%	9%	13%	13%	16%

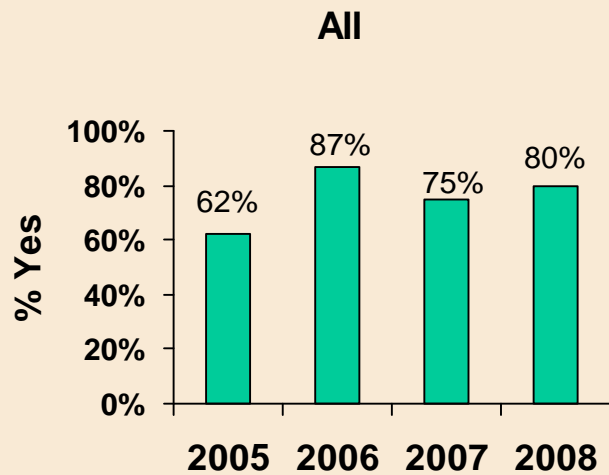
Familiar with Zulu Kingdom slogan?



Associations - Zulu Kingdom slogan: Core Mentions

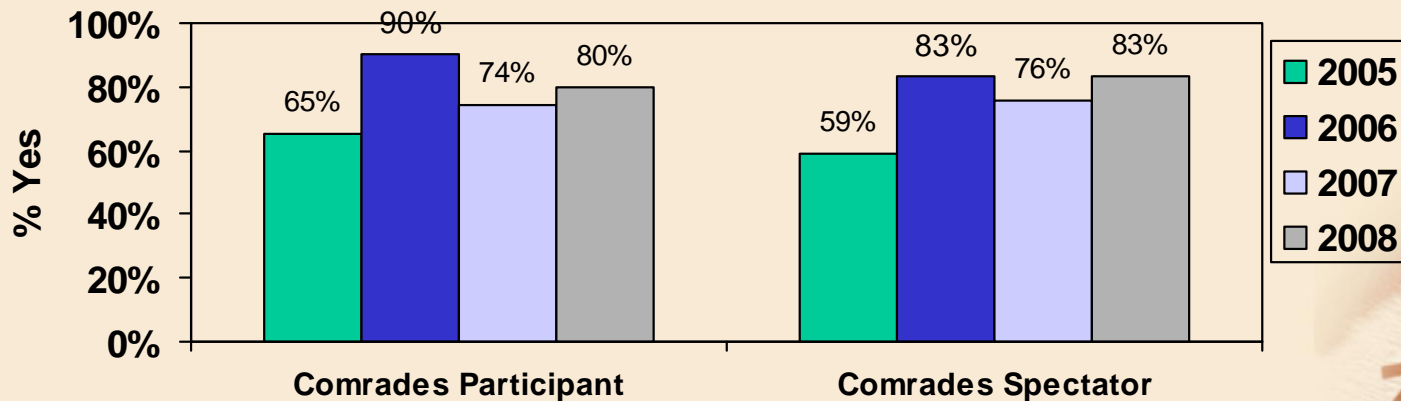


Noted Zulu Kingdom logo?

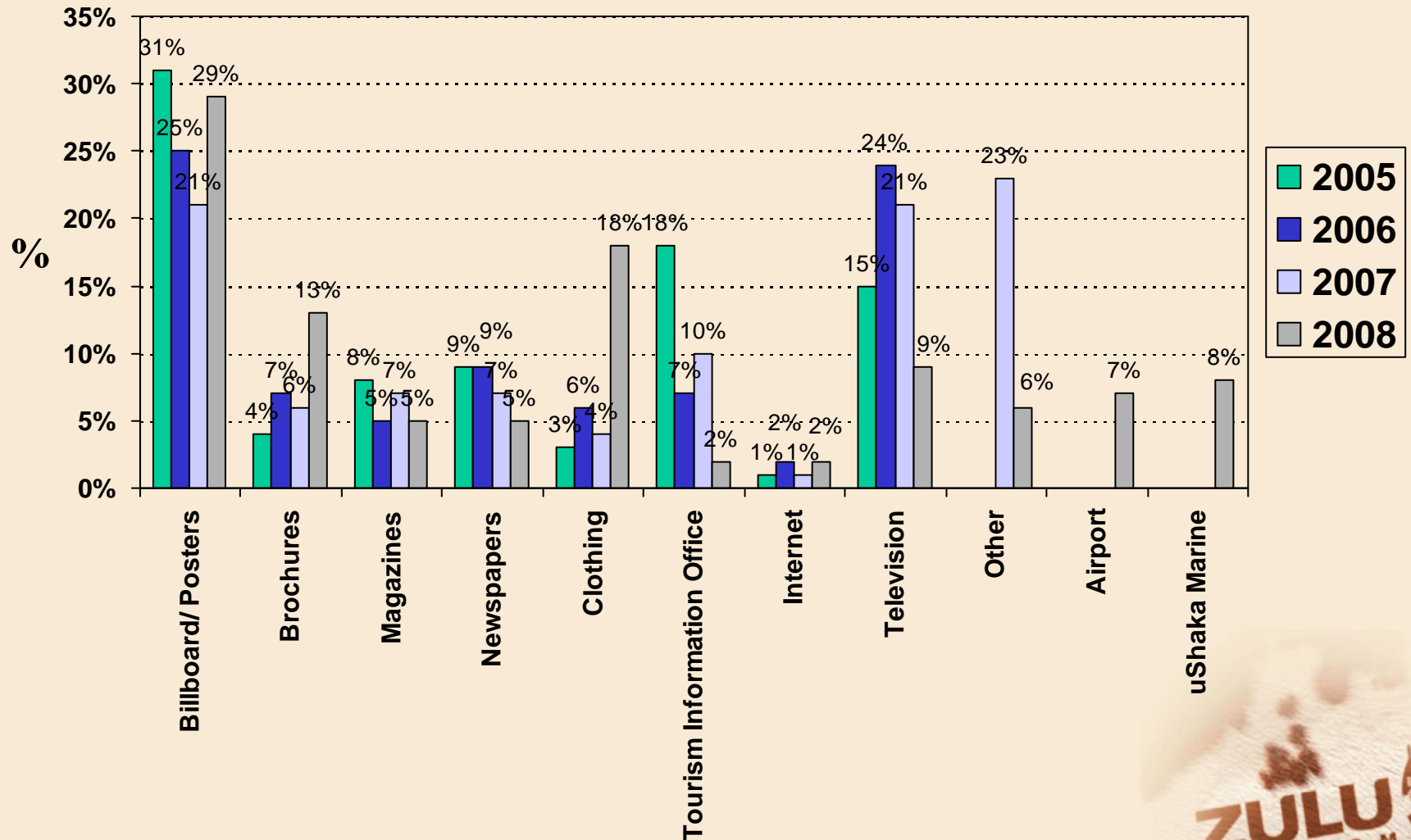


	Resident				Visitor			
	2005	2006	2007	2008	2005	2006	2007	2008
Yes	73%	92%	86%	90%	48%	83%	67%	78%
No	27%	8%	14%	10%	52%	17%	33%	22%

Purpose of visit



Where Zulu Kingdom logo noted?



Conclusion/Main Findings

- Although there was an increase in the number of international participants as compared to 2007, there was however a considerable decrease in the overall number of participants. This could be attributed to a significant drop in the number of SA participants when compared to 2007.
- There was a significant decrease in spectators from Gauteng and Western Cape, while there was an increase in spectators from KZN. There was thus a change in profile of spectators. More emphasis should thus be put in re-attracting people from these provinces.
- There was a decrease in the average length of stay.
- Word of mouth continues to be the influencing factor for both spectators and participants in attending the Comrades.
- In terms of attending the event again, there was a 3% drop in participants who indicated repeat participation when comparing 2007 and 2008. As regards spectators, there was an increase of 1% with 84% indicating repeat attendance.