

# Comrades 2007 Impact Assessment: Top Line Summary Report

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# Methodology

- Primary data:
  - Face to face survey – 584 respondents
  - Stratified probability sample – 350 participants and 234 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 and other marathon websites

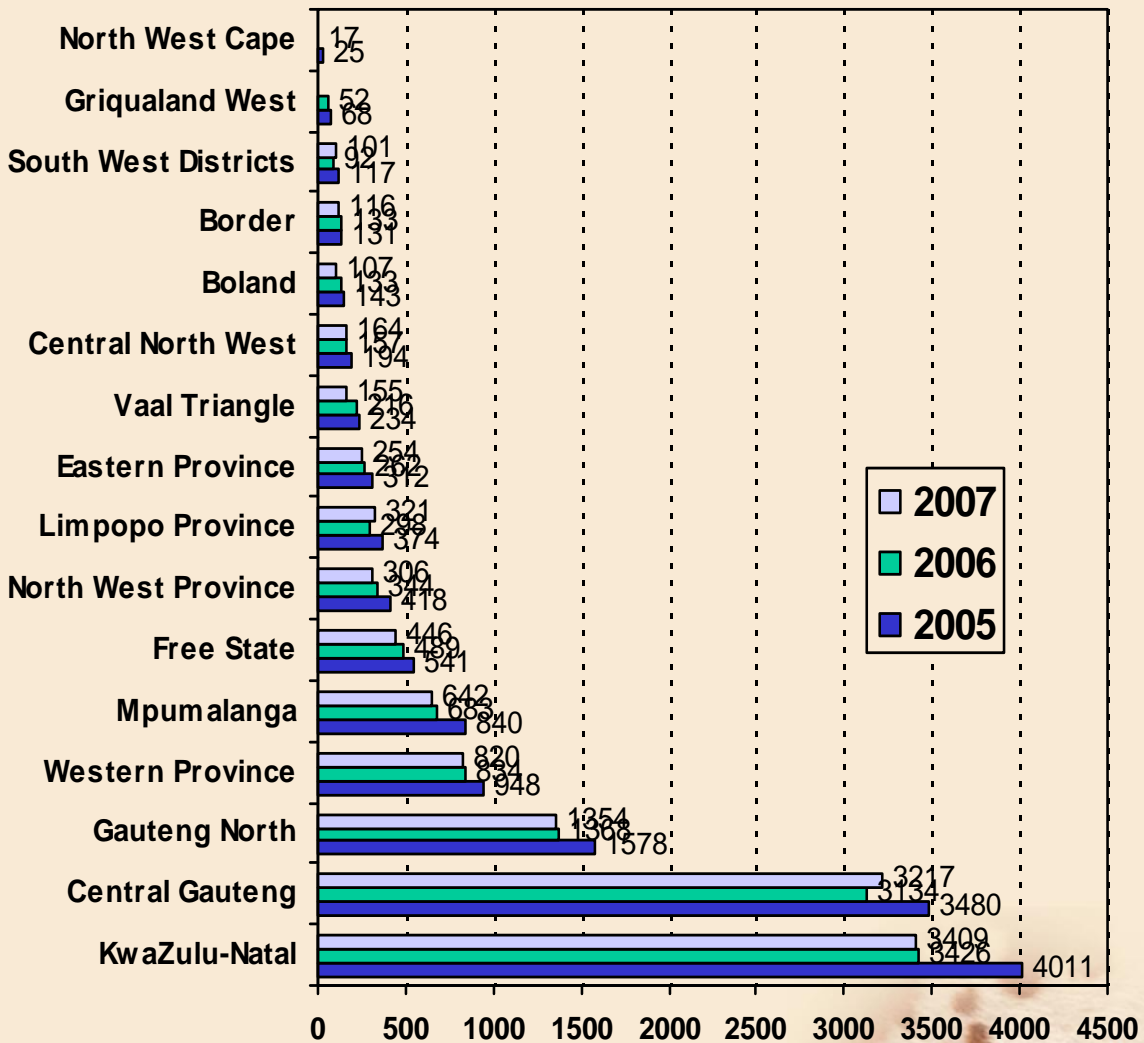


# Nature and Extent of Comrades Participants

## South African Regions

Country 2007

Country	Number	%
KZN Only	3409	29
South Africa	11481	96.26
United Kingdom	84	0.70
Brazil	49	0.41
United States	48	0.40
Australia	47	0.39
Zimbabwe	43	0.36
Germany	24	0.20
Lesotho	22	0.18
Switzerland	14	0.12
Swaziland	13	0.11
Japan	12	0.10
<b>Total</b>	<b>11837</b>	<b>100</b>



# Nature and Extent Two Oceans Ultra-Marathon Participants

<b>Participants</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>
<b>Western Province</b>	4090	5354	5876
<b>%</b>	54%	54%	55%
<b>Non-Western Province</b>	3020	3997	4372
<b>%</b>	40%	41%	41%
<b>Other African Countries</b>	142	180	204
<b>%</b>	2%	2%	2%
<b>International</b>	316	306	305
<b>%</b>	4%	3%	3%
<b>Total</b>	<b>7568</b>	<b>9837</b>	<b>10757</b>

# Other Significant International Marathons

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



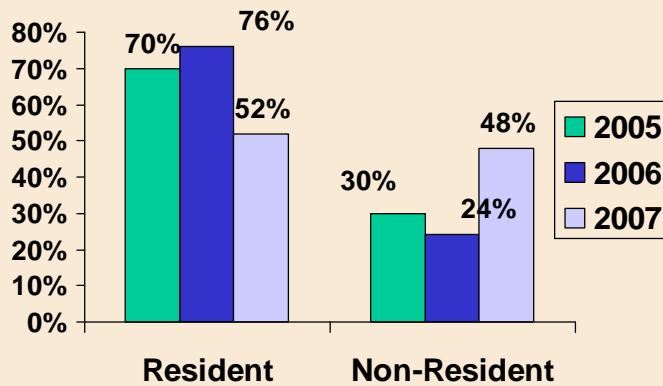
# Prize Money Comrades vs other similar events

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

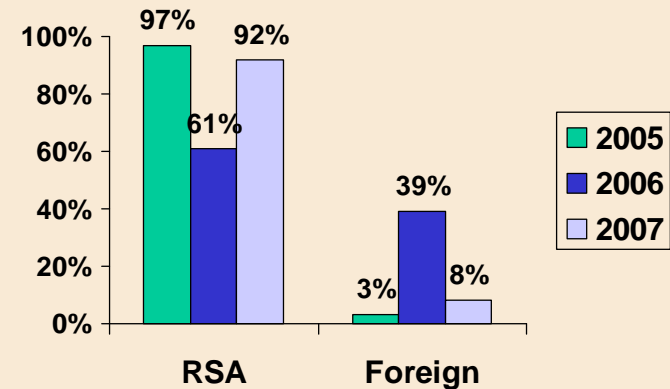


# Nature of Spectator Respondents

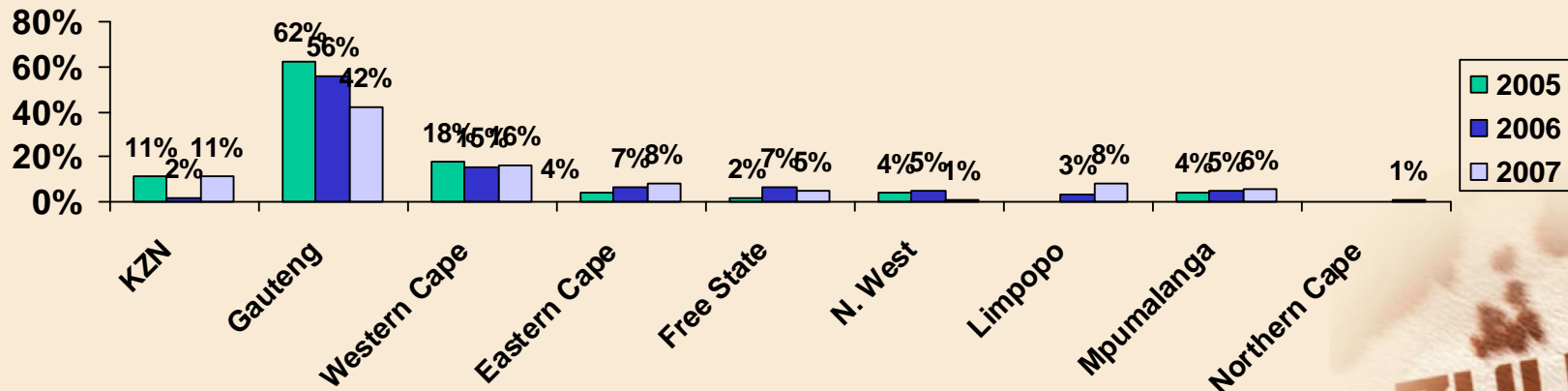
## All Spectators



## Non-Resident Spectators



## South African Non-Resident Spectators



# Average Spend

- Average total spend R2 711.21
- Non-resident participants R3 799.07
- Resident participants R702.27
- Non-resident spectators R4 452.63

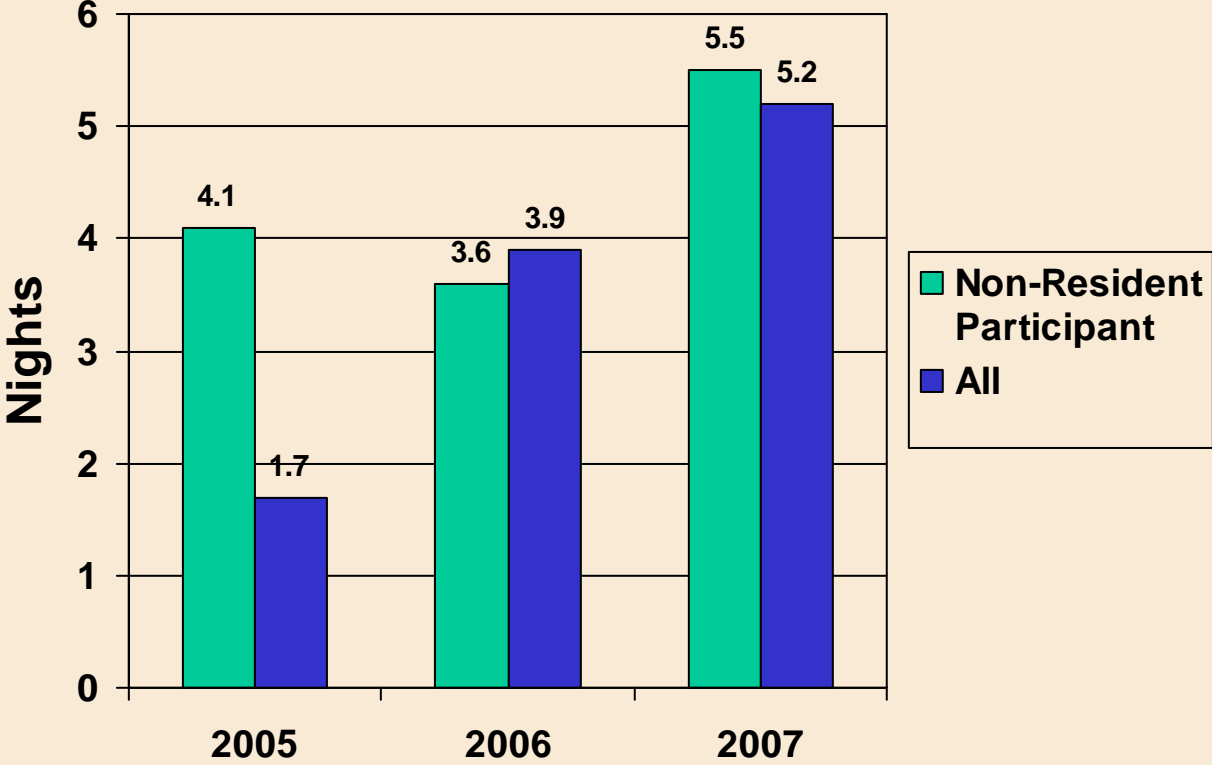


# Estimated Economic Impact: Participants and Non-Resident Spectators

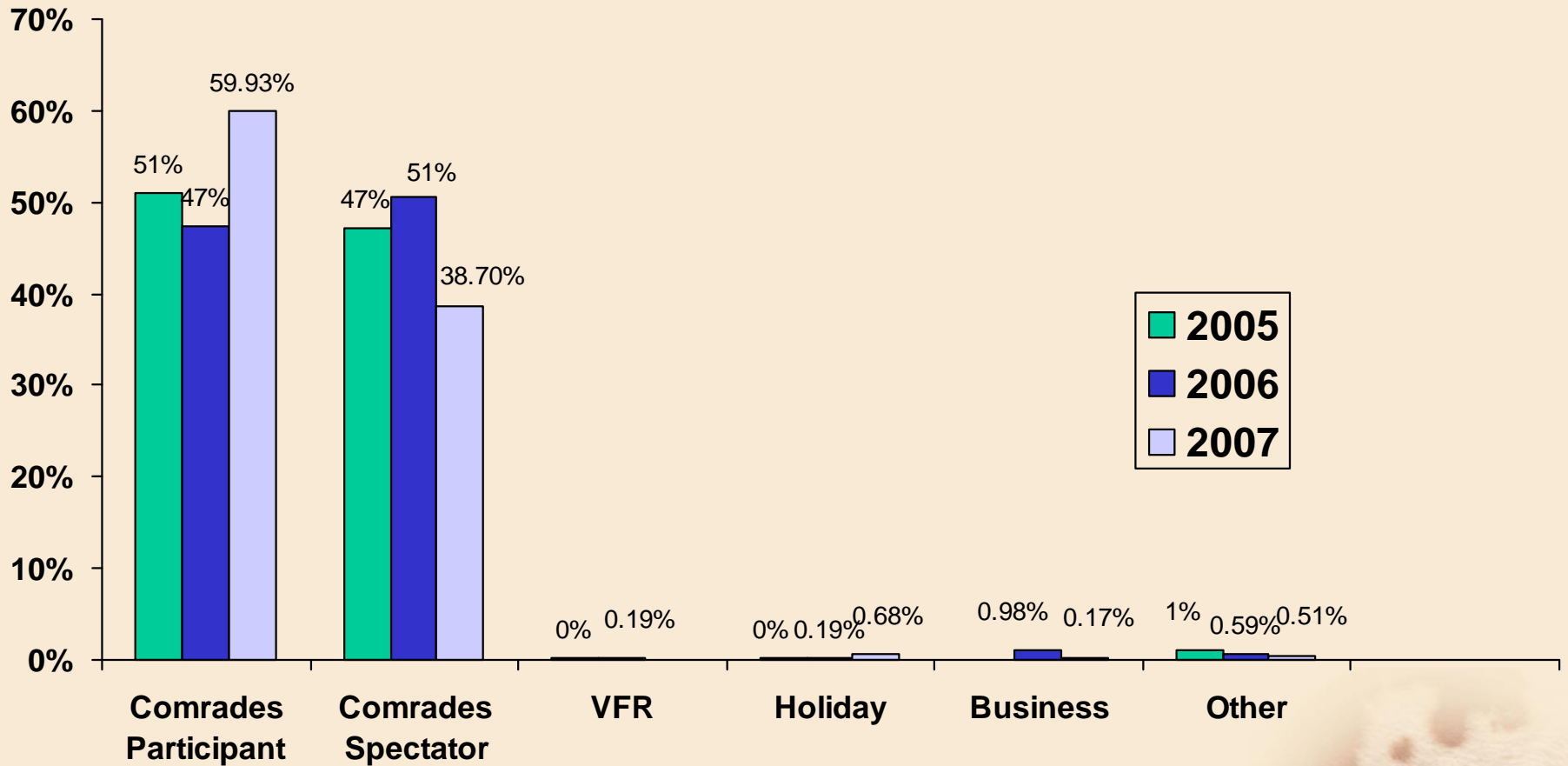
- Non-resident participants  $(11\,927 - 3\,409) \times R3\,779.07 = R32.19\text{mn}$
- Resident participants  $3\,409 \times R702.27 = R2.4\text{mn}$
- Non-resident spectators  $(48\,855^* - 11\,927) \times 48\% \times R4\,452.63 = R29.6\text{mn}$  or  $(8\,518 \text{ non-resident participants} \times \text{average group size of } 2.3 \text{ immediate family or friends} \times R4\,452.63 = R87.2\text{mn})$
- Direct Spend = at least  $(R32.19\text{mn} + R2.4\text{mn} + R29.6\text{mn}) R64.39\text{mn}$  and as much as  $(R32.19\text{mn} + R2.4\text{mn} + R87.2\text{mn}) R121.79\text{mn}$
- Total impact including multiplier of 1.42 = between  $R91.43\text{mn}$  and  $R172.94\text{mn}$
- Direct and indirect annual jobs sustained or generated = between 910 and 1 730.

\* 48 855 people attended the Comrades Experience Exhibition

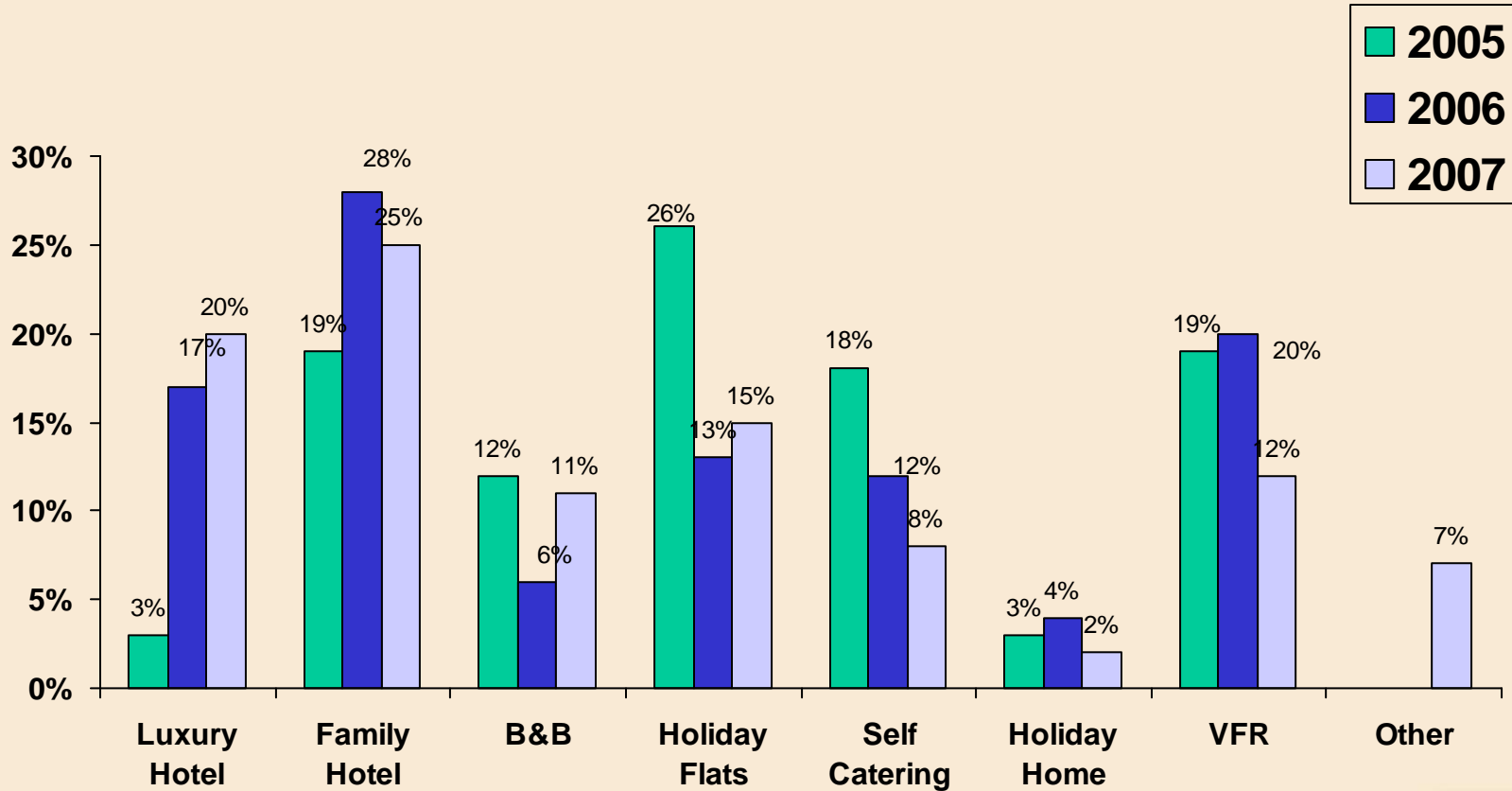
# Average Length of Stay



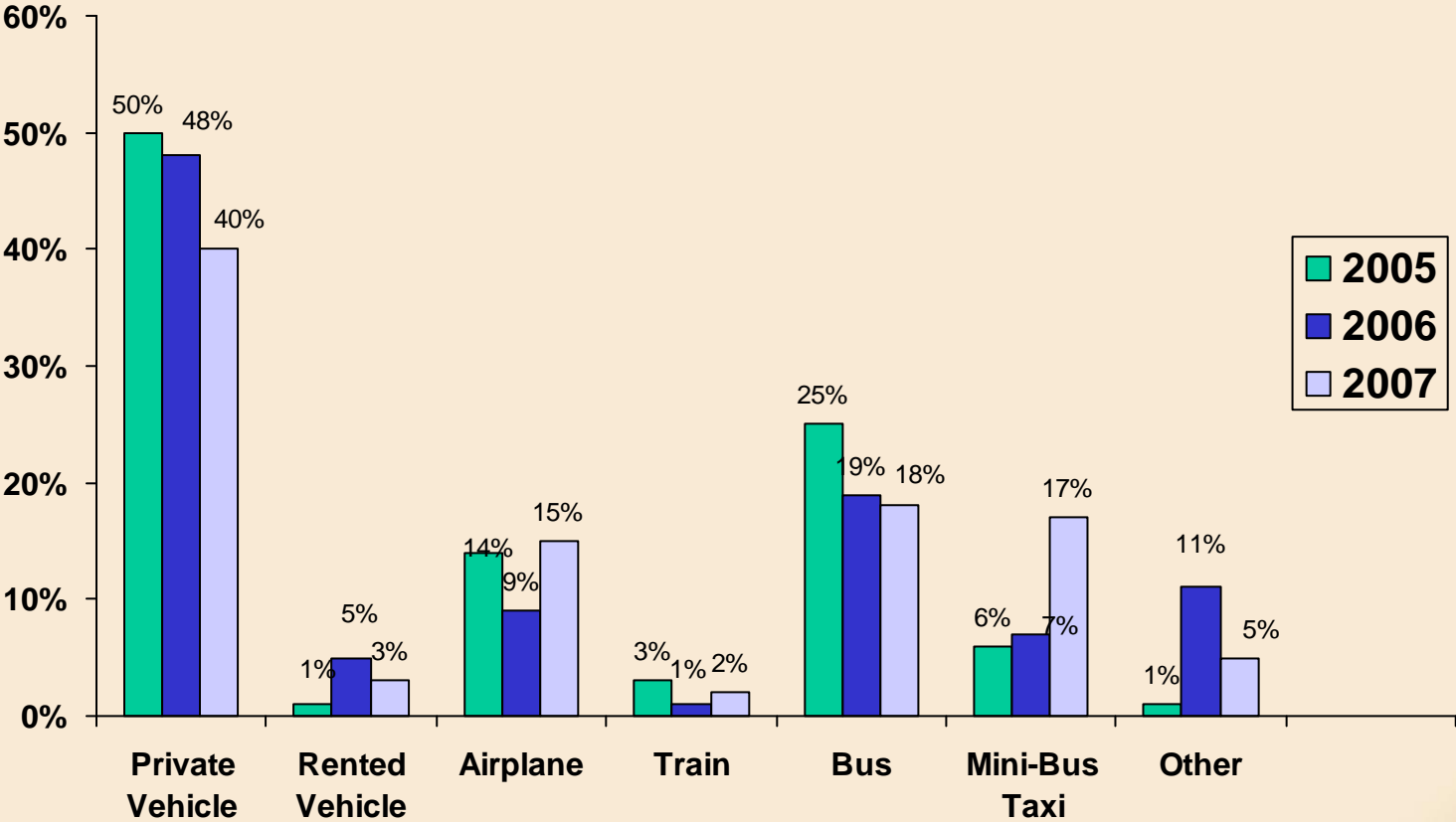
# Primary reason for visiting area where event took place



# Accommodation: Non-Residents

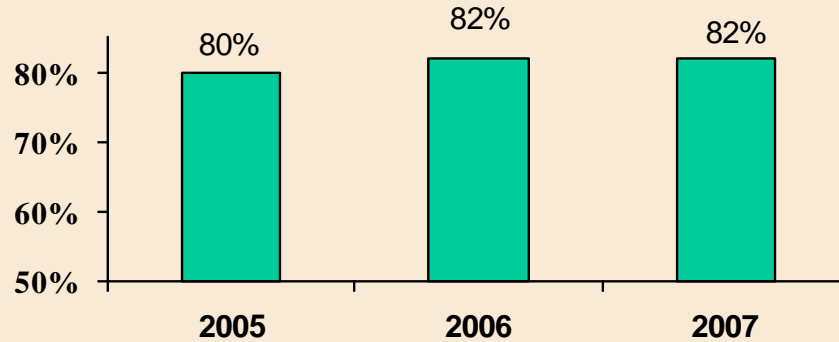


# Transport to Event: Non-Residents

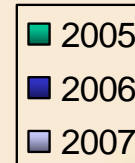
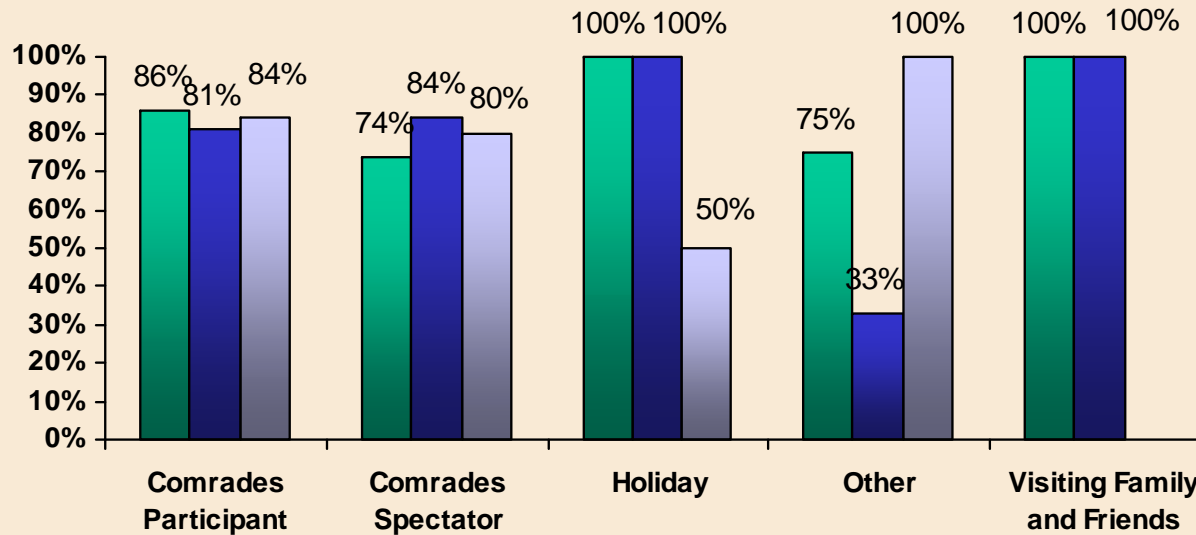


# Attended in previous years?

## Attended previously

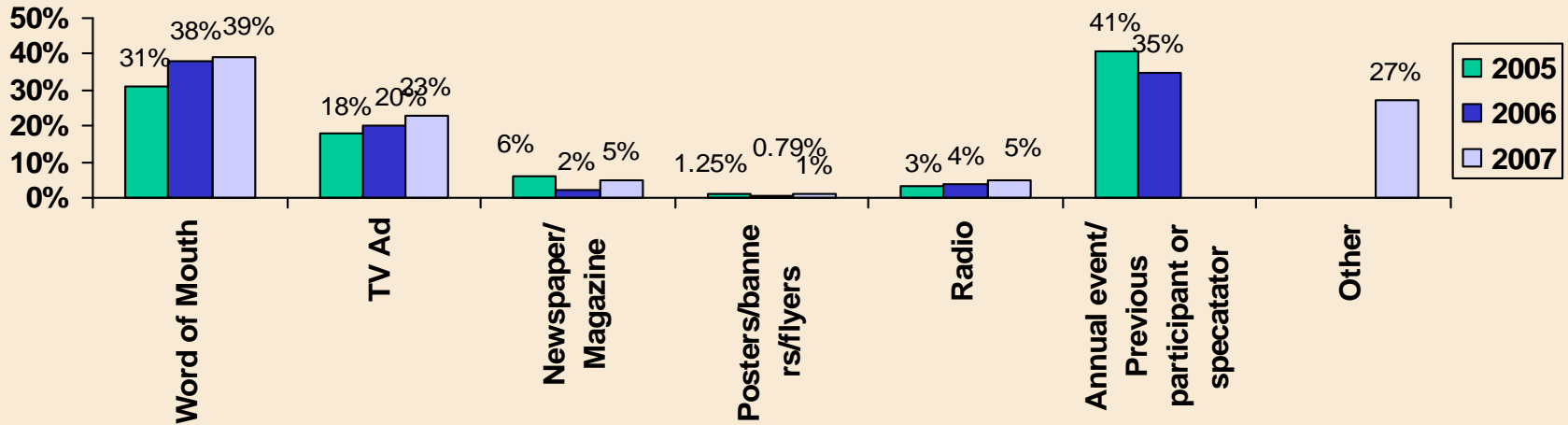


## Attended by Purpose of visit



# Influenced to attend?

## All

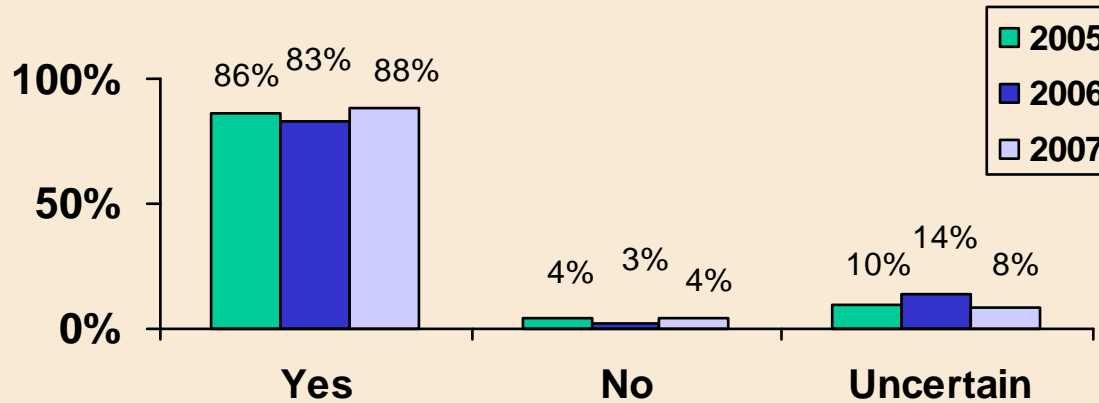


## By Media

	Newspaper/magazine			Poster/banner/flyer			Radio			TV Ad			Word-of-mouth			Annual event/prev. partic/spectr		
	'05	'06	'07	'05	'06	'07	'05	'06	'07	'05	'06	'07	'05	'06	'07	'05	'06	'07
<b>Participant %</b>	6	1	5	1	1	1	3	3	5	21	26	24	20	29	32	47	39	33
<b>Spectator %</b>	6	4	4	1	1	1	3	3	5	15	16	22	43	46	49	33	30	19

# Attend again?

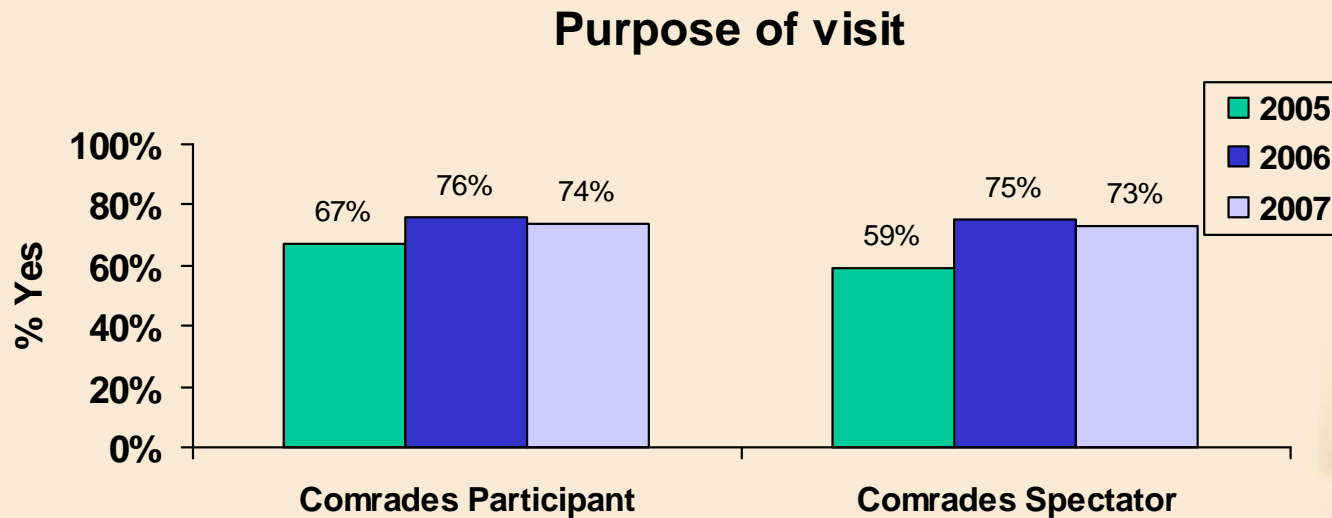
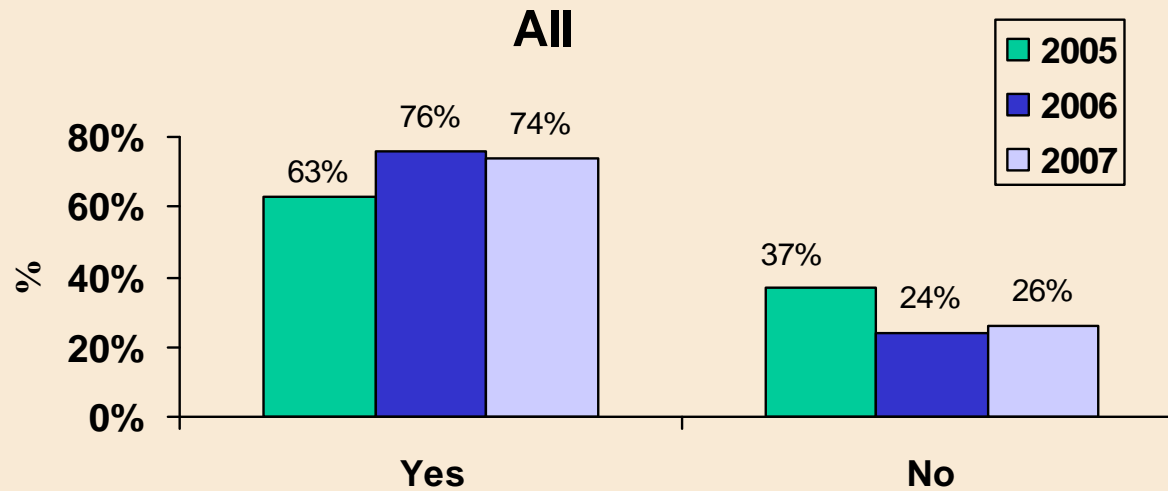
All



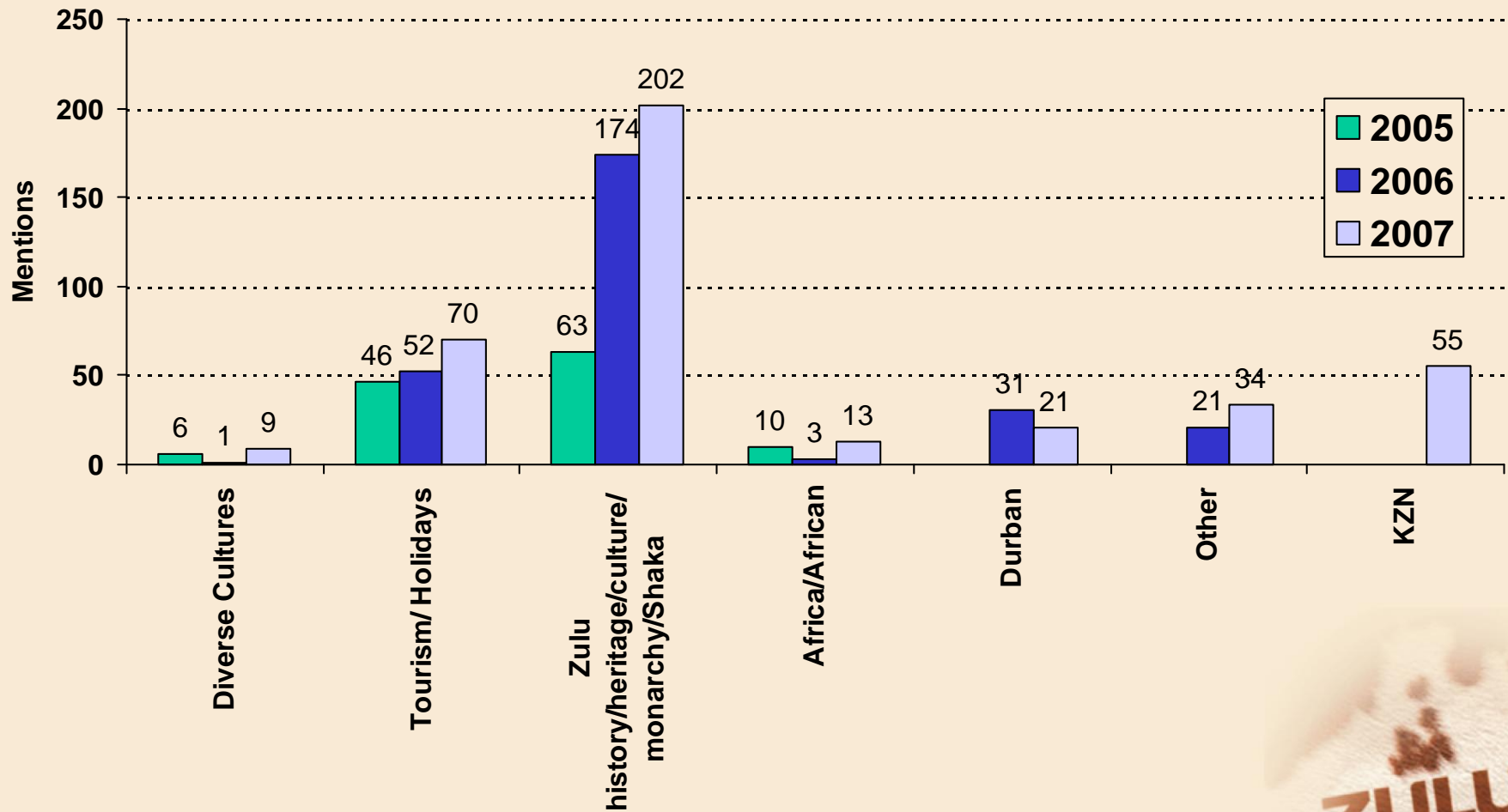
	Participant			Spectator		
	2005	2006	2007	2005	2006	2007
<b>Yes</b>	86%	85%	91%	86%	83%	83%
<b>No</b>	3%	0%	4%	5%	4%	4%
<b>Uncertain</b>	11%	15%	5%	9%	13%	13%



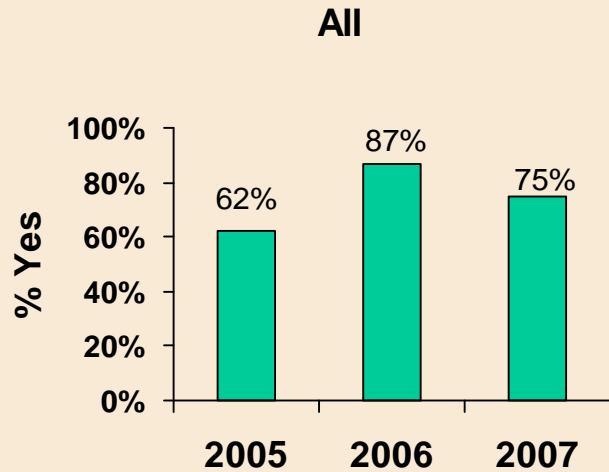
# Familiar with Zulu Kingdom slogan?



# Associations - Zulu Kingdom slogan: Core Mentions

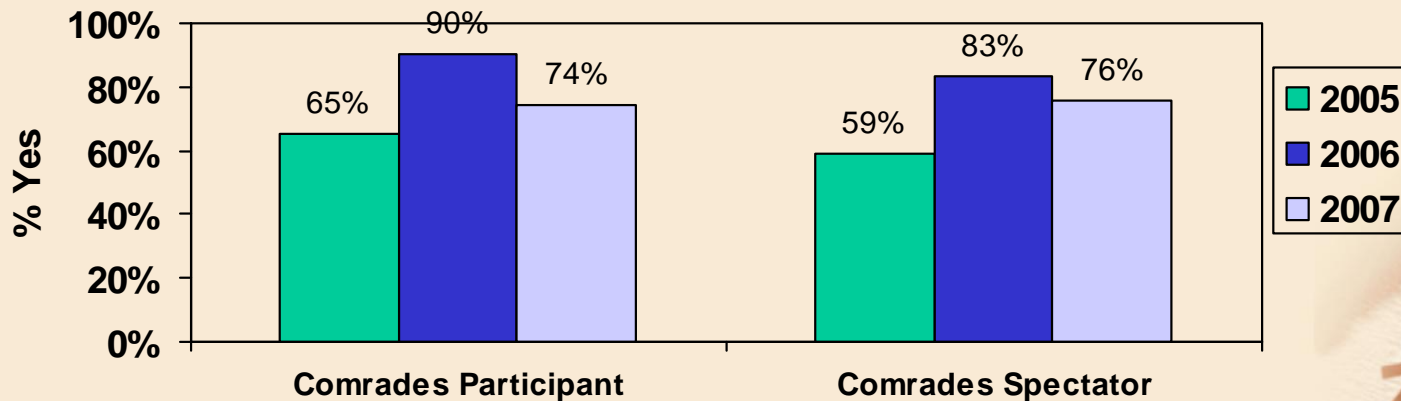


# Noted Zulu Kingdom logo?

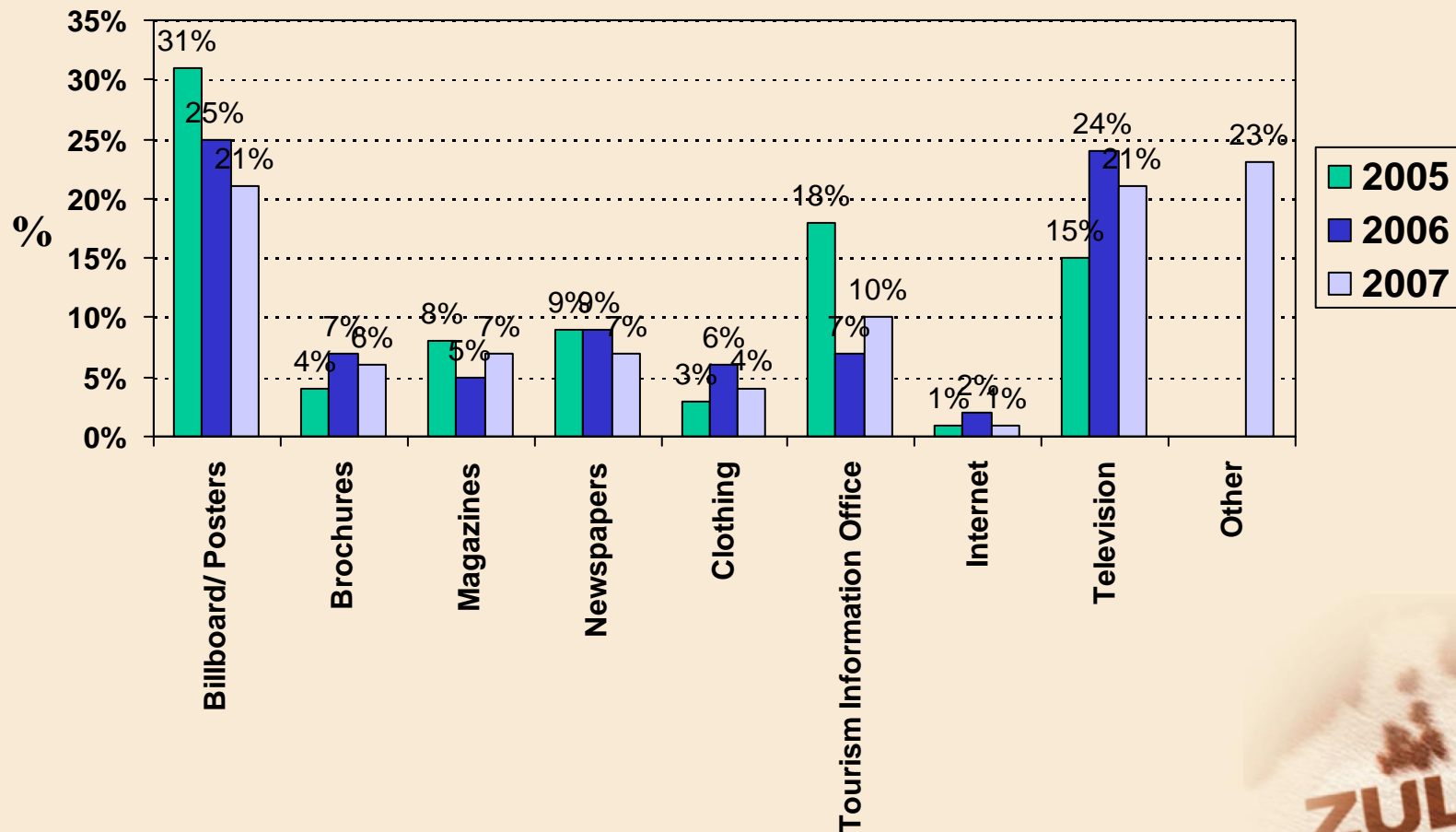


	Resident			Visitor		
	2005	2006	2007	2005	2006	2007
<b>Yes</b>	73%	92%	86%	48%	83%	67%
<b>No</b>	27%	8%	14%	52%	17%	33%

## Purpose of visit



# Where Zulu Kingdom logo noted?



# Conclusion

- The Comrades Marathon manages to attract a greater proportion of participants from other provinces than is the case with the Two Oceans Ultra Marathon. However, the Two Oceans Marathon has a higher proportion of foreign participants, some 6% vs the 4% of the Comrades Marathon. The London and New York Marathons are also able to attract higher proportions of foreign participants.
- There is thus potential for the Comrades to grow its proportion of foreign participants or to internationalise this event. One of the core means that could be used to raise this proportion could be to increase the amount of prize money for this event to a similar level to that of the New York Marathon. This could attract more foreign runners and media interest.
- The Comrades Marathon generates significant tourism flow and spend. The total economic impact of the spend of these tourists could be as much as R172mn!