

Comrades 2010 Impact Assessment: Top Line Summary Report

Zama Dlamini
Karen Kohler
Tourism KwaZulu-Natal
September 2010



Methodology

- Primary data:
 - Face to face survey – 269 respondents
 - Stratified probability sample – 216 participants and 53 spectators/other.
 - Respondents systematically selected over 3 days (27-29 May 2010) before event at the 'Comrades Experience' and at the finishing point on the day of event on 30 May 2010.
- Secondary data: Comrades House, Two Oceans Marathon Association



Nature and Extent of Comrades Participants

South African Regions

	2005	2006	%	2007	%	2008	%
KwaZulu-Natal	4011	3426	-15	3409	-0.5	3088	-9
Central Gauteng	3480	3134	-10	3217	3	3068	-5
Gauteng North	1578	1368	-13	1354	-1	1187	-12
Western Province	948	834	-12	820	-2	736	-10
Mpumalanga	840	683	-19	642	-6	581	-10
Free State	541	489	-10	446	-9	428	-4
North West Province	418	344	-18	306	-11	283	-8
Limpopo Province	374	298	-20	321	8	305	-5
Eastern Province	312	262	-16	254	-3	256	1
Vaal Triangle	234	216	-8	155	-28	145	-6
Central North West	194	157	-19	164	5	155	-6
Boland	143	133	-7	107	-20	98	-8
Border	131	133	2	116	-13	122	5
South West Districts	117	92	-21	101	10	93	-8
Griqualand West	68	52	-24			40	
North West Cape	25	17	-32			41	
Total	13414	11638	-13	11412	-2	10626	-7

Nature and Extent of Comrades Participants

South African Regions

	2009	%	2010	%
KwaZulu-Natal	3642	18	5885	62
Central Gauteng	3600	17	6313	75
Gauteng North	1349	14	2681	99
Western Province	914	24	1904	108
Mpumalanga	680	17	1114	64
Unknown	-	-	789	-
Free State	437	2	680	56
North West Province	329	16	536	63
Limpopo Province	345	13	494	43
Eastern Province	256	0	523	104
Vaal Triangle	168	16	312	86
Central North West	168	8	249	48
Boland	127	30	281	121
Border	121	-1	232	92
South West Districts	113	22	259	129
Griqualand West	45	13	49	9
North West Cape	41	0	54	32
Transkei	11	-	22	100
Total	12346	16	22377	81

Nature and Extent of Comrades Participants

South African Regions – 2009 & 2010

	2009	%	2010	%
KwaZulu-Natal	3642	28.1	5885	25.5
Central Gauteng	3600	27.8	6313	26.8
Gauteng North	1349	10.4	2681	11.4
Western Province	914	7.1	1904	8.1
Mpumalanga	680	5.3	1114	4.7
Unknown	-	-	789	3.3
Free State	437	3.4	680	2.9
Limpopo	345	2.7	494	2.1
North West Province	329	2.5	536	2.3
Eastern Province	256	2.0	523	2.2
Central North West	168	1.3	249	1.1
Vaal Triangle	168	1.3	312	1.3
Boland	127	1.0	281	1.2
Border	121	0.9	232	1.0
South West Districts	113	0.9	259	1.1
Griqualand West	45	0.3	49	0.2
North West Cape	41	0.3	54	0.2
Transkei	11	0.1	22	0.1
Rest of Africa	-		225	1.0
International	606	4.7	965	4.1
Total	12952	100	23567	100

Nature and Extent of Comrades Participants

Country	Number 2007	% (2007)	Number 2008	% (2008)	Number 2009	% (2009)	Number 2010	% (2010)
South Africa (including KZN)	11481	96.99	10631	95.10	12 346	95.32	22 377	94.95
United Kingdom	84	0.71	116	1.0	130	1.00	256	1.09
Australia	47	0.40	74	0.66	66	0.51	145	0.62
United States	48	0.41	59	0.53	61	0.47	182	0.77
Zimbabwe	43	0.36	49	0.44	54	0.42	92	0.39
Brazil	-	-	44	0.39	48	0.37	78	0.33
Lesotho	22	0.19	32	0.29	34	0.26	44	0.19
Germany	24	0.20	31	0.28	31	0.24	44	0.19
Canada	-	-	14	0.13	14	0.11	29	0.12
Swaziland	13	0.11	14	0.13	16	0.12	22	0.09
Japan	12	0.10	14	0.13	17	0.13	16	0.07
Ireland	-	-	11	0.10	7	0.05	16	0.07
Russia	-	-	9	0.08	8	0.06	9	0.04
Switzerland	14	0.12	9	0.08	15	0.12	27	0.11
France	-	-	8	0.07	5	0.04	13	0.06
Namibia	-	-	7	0.06	8	0.06	32	0.14
Netherlands	-	-	6	0.05	6	0.05	20	0.08
United Arab Emirates	-	-	5	0.04	14	0.11	27	0.11
New Zealand	-	-	4	0.04	8	0.06	18	0.08

Nature and Extent of Comrades Participants (cont'd)

Country	Number 2007	% 2007	Number 2008	% 2008	Number 2009	% 2009	Number 2010	% 2010
Israel	-	-	3	0.03	1	0.01	4	0.02
Chile	-	-	3	0.03	-	-	-	-
Zambia	-	-	2	0.02	4	0.03	5	0.02
Argentina	-	-	2	0.02	2	0.02	1	-
Austria	-	-	2	0.02	1	0.01	4	0.02
Belgium	-	-	2	0.02	-	-	3	0.01
Botswana	-	-	2	0.02	4	0.03	12	0.05
Ethiopia	-	-	2	0.02	1	0.01	2	0.01
Finland	-	-	2	0.02	-	-	-	-
Hong Kong	-	-	2	0.02	3	0.02	8	0.03
Indonesia	-	-	2	0.02	-	-	-	-
Malawi	-	-	2	0.02	4	0.03	1	-
Portugal	-	-	2	0.02	3	0.02	11	0.05
Saudi Arabia	-	-	2	0.02	2	0.02	2	0.01
Cameroon	-	-	1	0.01	1	0.01	1	-
China	-	-	1	0.01	1	0.01	↓	-
Denmark	-	-	1	0.01	-	-	2	0.01
Kenya	-	-	1	0.01	15	0.12	5	0.02
Malaysia	-	-	1	0.01	-	-	-	-
Philippines	-	-	1	0.01	1	0.01	1	-

Nature and Extent of Comrades Participants (cont'd)

Country	Number 2007	% 2007	Number 2008	% 2008	Number 2009	% 2009	Number 2010	% 2010
Poland	-	-	1	0.01	1	0.01	3	0.01
Spain	-	-	1	0.01	-	-	1	-
Sweden	-	-	1	0.01	4	0.03	7	0.03
Thailand	-	-	1	0.01	-	-	-	-
Trinidad & Tobago	-	-	1	0.01	-	-	2	0.01
Uganda	-	-	1	0.01	-	-	1	-
Mozambique	-	-	-	-	5	0.04	2	0.01
Singapore	-	-	-	-	3	0.02	6	0.03
Ghana	-	-	-	-	1	0.01	1	-
India	-	-	-	-	1	0.01	10	0.04
Malta	-	-	-	-	1	0.01	1	-
Mexico	-	-	-	-	1	0.01	1	-
Norway	-	-	-	-	1	0.01	2	0.01
Somalia	-	-	-	-	1	0.01	-	-
Tanzania	-	-	-	-	-	-	2	0.01

There was an increase in runners from other African countries such as Swaziland, Namibia, Botswana and Zimbabwe.

Nature and Extent of Comrades Participants (cont'd)

Country	Number 2007	% 2007	Number 2008	% 2008	Number 2009	% 2009	Number 2010	% 2010
Cayman Islands	-	-	-	-	-	-	2	0.01
Croatia							1	-
Czech Republic							2	0.01
Gambia							1	-
Greece							1	-
Gautemala							1	-
Hungary							1	-
Iceland							1	-
Egypt							1	-
Kuwait							1	-
Lithuania							1	-
Luxembourg							3	0.01
Mauritius							1	-
Peru							1	-
Sudan							1	-
TOTAL	11 837		11 179		12 952		23 567	

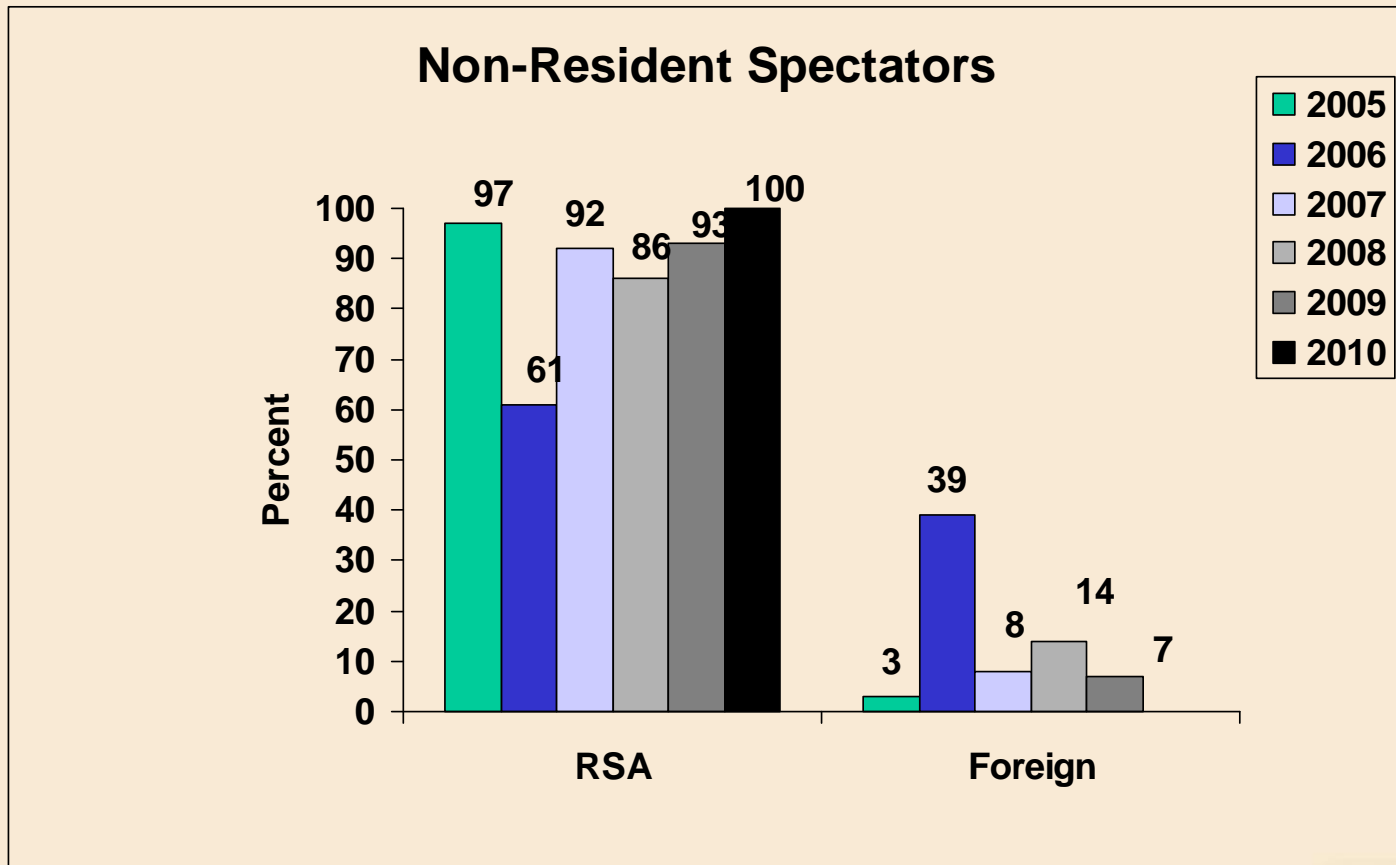
	2007	2008	2009	2010
International Runners	307	548	606	965
Growth	-	79%	11%	59%



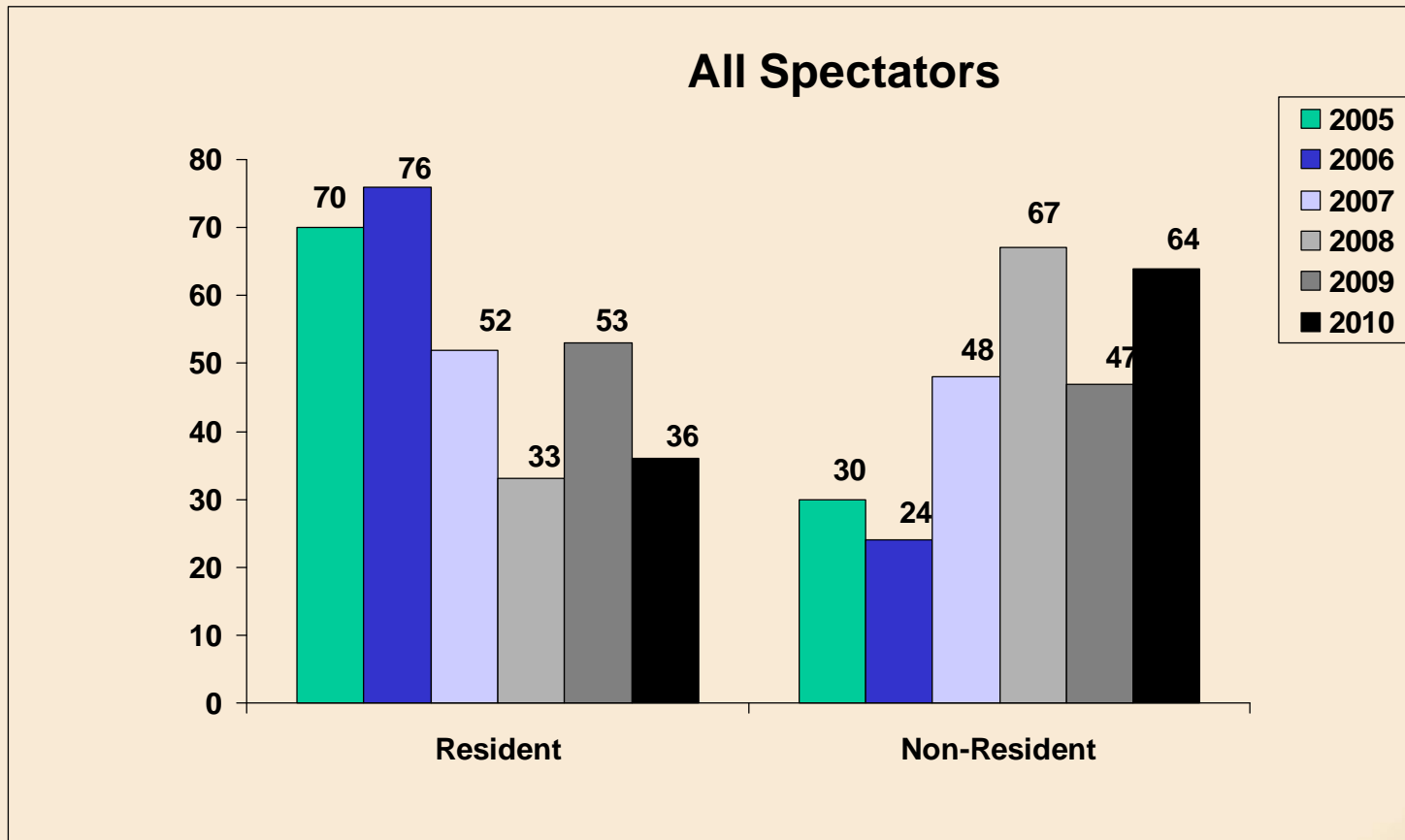
Nature and Extent of Two Oceans Ultra & Half-Marathon Participants

Participants	2007 Ultra	2007 Half	2008 Ultra	2008 Half	2009 Ultra	2009 Half	2010 Ultra	2010 Half
Western Province	1804	5876	1639	6216	1592	6327	2251	6236
%	24%	55%	24%	55%	24%	55%	26%	54%
Non-Western Province	5377	4366	4639	4593	4559	4651	5892	4859
%	70%	41%	69%	41%	69%	40%	67%	42%
Other African Countries	123	187	79	134	71	177	181	174
%	1%	1%	1%	1%	1%	2%	2%	2%
International	352	323	336	270	342	295	448	300
%	5%	3%	5%	2%	5%	3%	5%	3%
Total	7656	10752	6693	11213	6564	11450	8772	11569

Nature of Spectator Respondents



Nature of Spectator Respondents



A statistical test could not be performed as the responses were below the minimum number required to perform such tests.

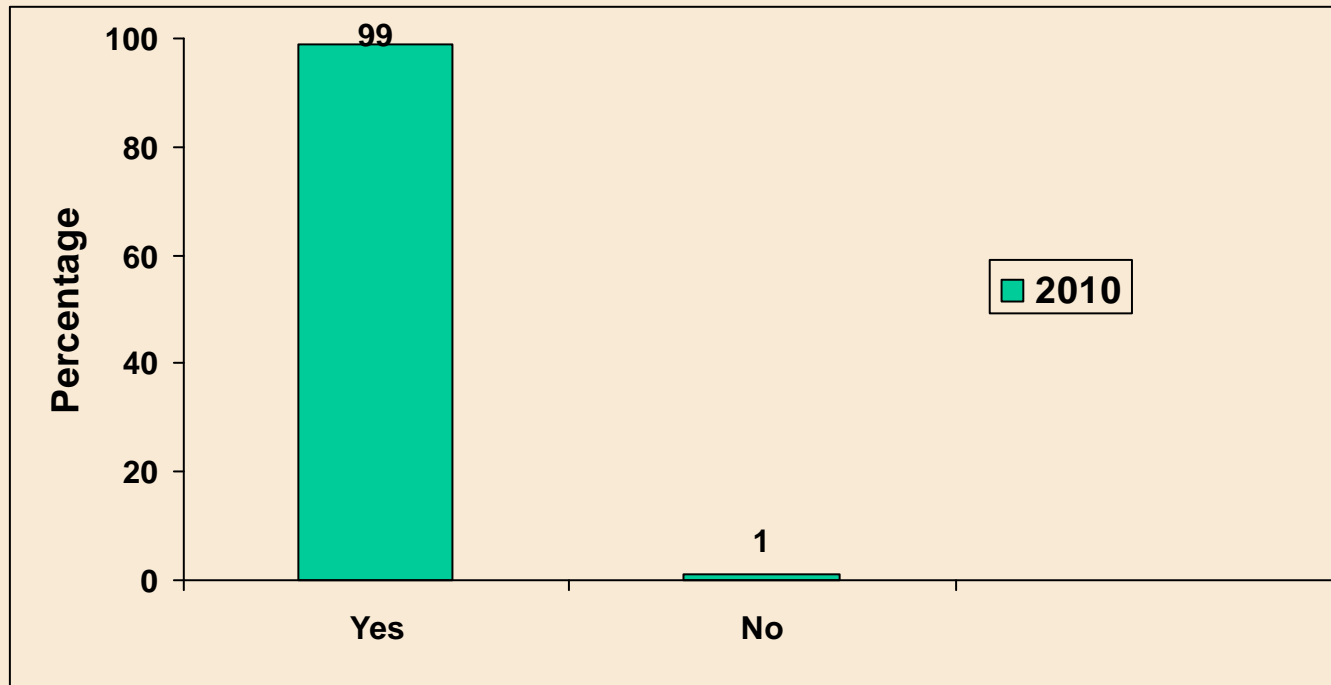
Nature of Spectator Respondents (cont'd)

South African Non-Resident Spectators

PROVINCE	2005 (%)	2006 (%)	2007 (%)	2008 (%)	2009 (%)	2010 (%)
KZN	11	2	11	27	46	30
Gauteng	62	56	42	33	24	43
Western Cape	18	15	16	10	11	3
Eastern Cape	4	7	8		6	3
Free State	2	7	5	10	2	3
N. West	4	5	1	7	3	3
Limpopo		3	8		5	13
Mpumalanga	4	5	6	13	3-	
Northern Cape	-	-	1 -		1-	

A statistical test could not be performed as the responses were below the minimum number required to perform such tests.

Recommend the event to family and friends?



Note: Those who indicated they would not recommend the event were participants.



Recommend the event to family and friends?

(cont'd)

Yes: Reasons

- Brilliant atmosphere
- It's good for body exercise/fitness
- It brings people together
- Good experience/ great event
- For health reasons
- It's a family event
- It's a good sport
- Enjoyable/fun/exciting
- To give support to the runners

No: Reasons

- As a result of the reception received at the Comrades



Images/Characteristics of KZN

- Adventure
- Art / Culture
- Warm weather / sun
- Beautiful landscape / green scenery
- Birding
- Fishing
- Big Five
- Comrades Marathon
- Entertainment / fun
- Relaxation
- Drakensberg / mountains
- Holiday
- King Shaka / Zulu people
- Moses Mabhida Stadium
- Sharks (rugby)
- Friendly people
- Ricksha
- Rivers



Mood/Atmosphere in KZN

- Fun/vibrant atmosphere
- Relaxed/calm
- Energetic/excitement
- Festive
- Friendly
- Happy atmosphere
- Holiday mood
- Jovial/lively
- Warm and relaxed



Average Spend

	2007	2008	2009	2010
Average total spend	R2 711	R6 242	R2 271	R2 606
Non-residents participants	R3 799	R8 598	R3 107	R3 658
Resident participants	R702	R529	R826	R645
Non -resident spectators	R4 453	R3 297	R2 750	R2 998

Estimated Economic Impact: Resident and Non-resident Participants

Non-resident participants

- N = 17 682 (23 567 – 5 885)
- Mean: R3 658
- Count: 136
- Std Dev: R3 477
- Std Error at 95% level of confidence spend between R3 069 and 4 248
- Estimated direct spend **excluding** Std Error = R64 684 292
- Estimated direct spend of at least R54 258 709 and as much as R75 109 875

Resident participants

- N = 5 885
- Mean: 645
- Count: 58
- Std Dev: R587
- Std Error @ 95% level of confidence spend between R 491 and as much as R799
- Estimated direct spend **excluding** Std Error = R3 796 414
- Estimated direct spend of at least R2 888 410 and as much as R4 704 417

* KwaZulu-Natal participants who are not all non-resident



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

Non-resident spectators

- $N = 23\,317$ ($60\,000 - 23\,567 * 64\%$)
- Mean: 2 998
- Count: 28
- Std Dev: R2 709
- Std Error @ 95% level of confidence spend between R1 948 and as much as R4 049
- Estimated direct spend **excluding** Std error = R69 906 698
- Estimated direct spend **taking** Std error of mean into account: At least R45 411 767 and as much as R94 401 628

Note:60 000 people attended the Comrades Expo. Double counting was not taken into account.

*participants



Estimated Economic Impact: Participants and Non-Resident Spectators

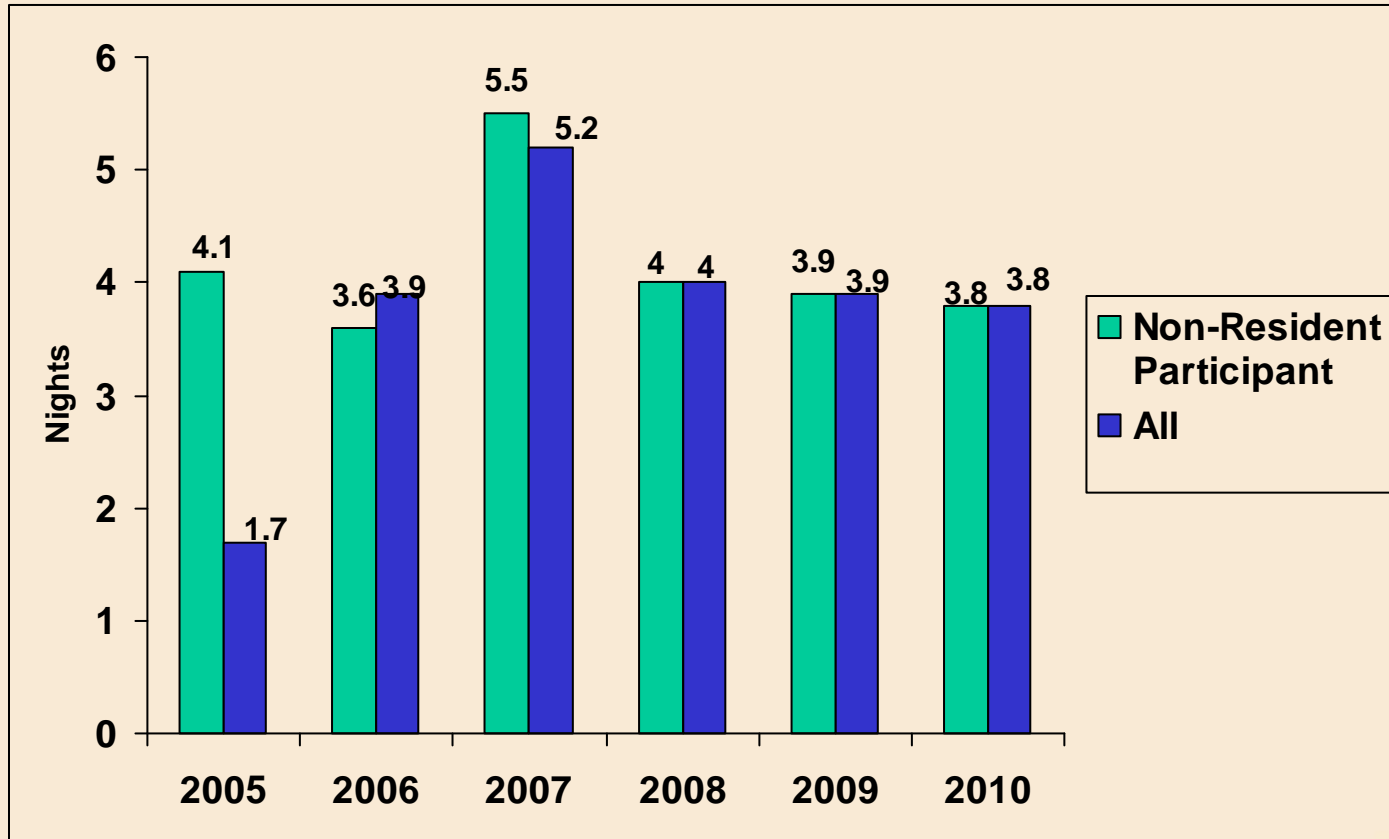
	2008	2009	2010
Non-resident participants	*Low: R38 701 917.37 **Middle: R69 568 036.20 ***High: R100 434 155.03	Low : R22 865 172.87 Middle: R28 923 457.07 High: R34 981 748.71	Low: R54 258 709 Middle: R64 684 292 High: R75 109 875
Resident participants	*Low: R955 022.05 **Middle: R1 633 243.20 ***High: R2 311 464.35	Low: R1 940 036.95 Middle: R3 006 774.38 High : R4 073 511.81	Low: R2 888 410 Middle: R3 796 414 High: R4 704 417
Non-resident spectators	*Low: R36 552 137.03 **Middle: R54 392 260.80 ***High: R72 232 384.57	Low : R58 817 524.63 Middle: R85 393 000.00 High: R111 968 475.40	Low: R45 411 767 Middle: R69 906 698 High: R94 401 628
Direct spend	At least R76 209 076.00 As much as R174 978 003.00	At least R83 622 734.45 As much as R151 023 736.02	At least R102 558 886 As much as R174 215 921
Total spend	At least R108 216 887.00 As much as R248 456 764.00	At least R118 744 282.90 As much as R214 453 705.10	At least R145 633 619 As much as R247 386 608

*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

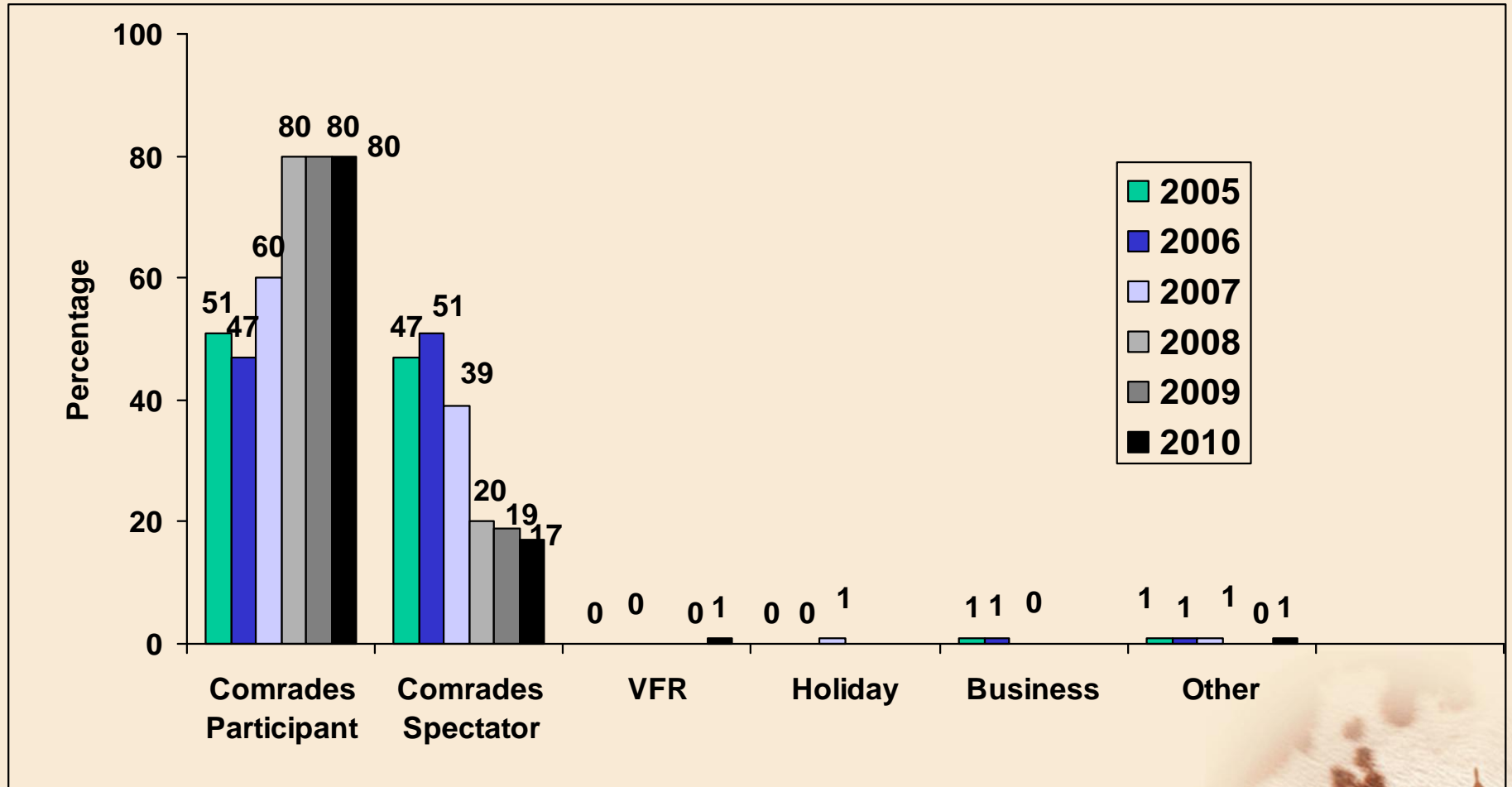
Average Length of Stay



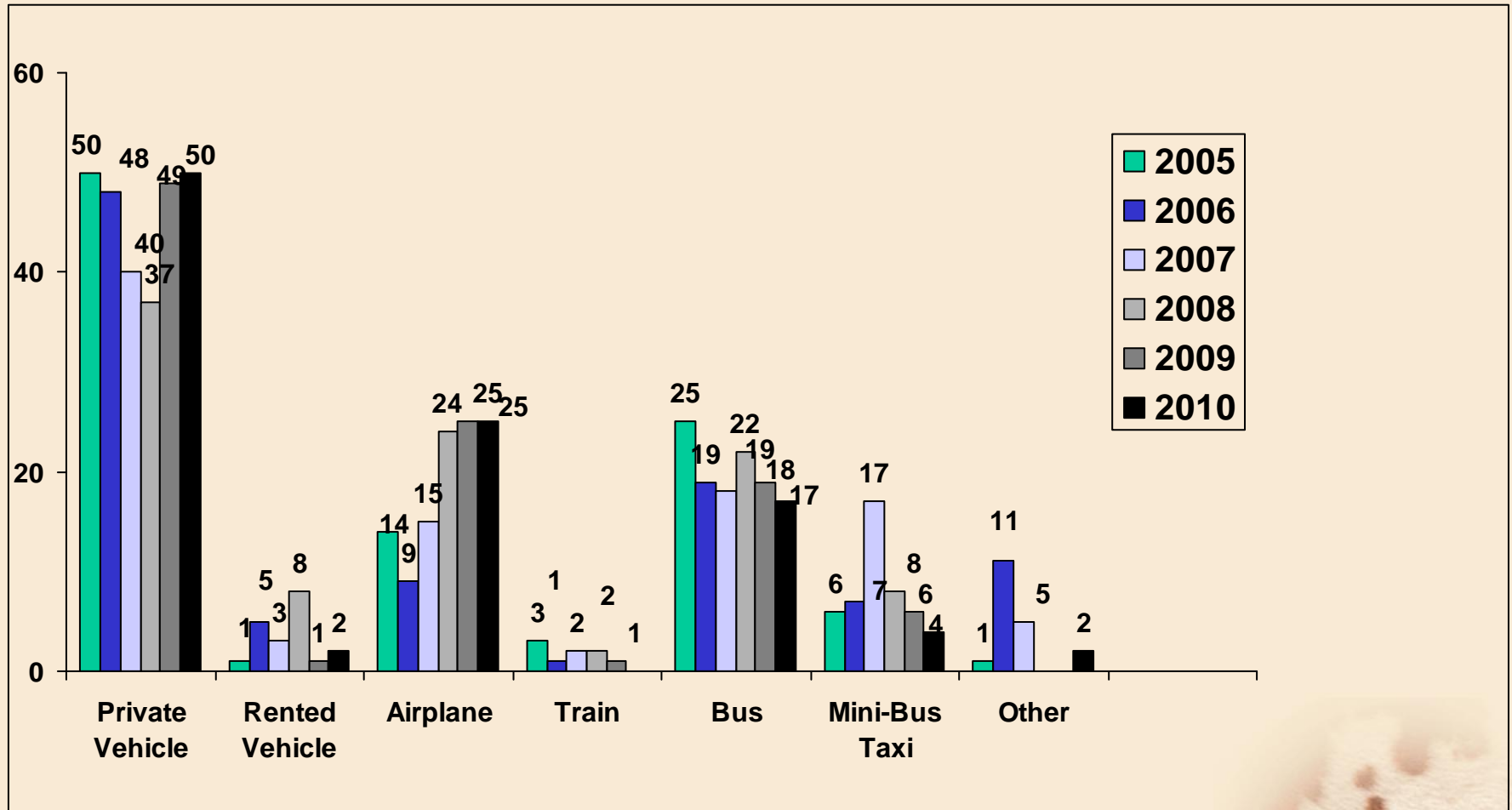
All	Mode	Median	Range
2009	3 nights	5 nights	9 nights
2010	3 nights	3 nights	13 nights



Primary reason for visiting area where event took place

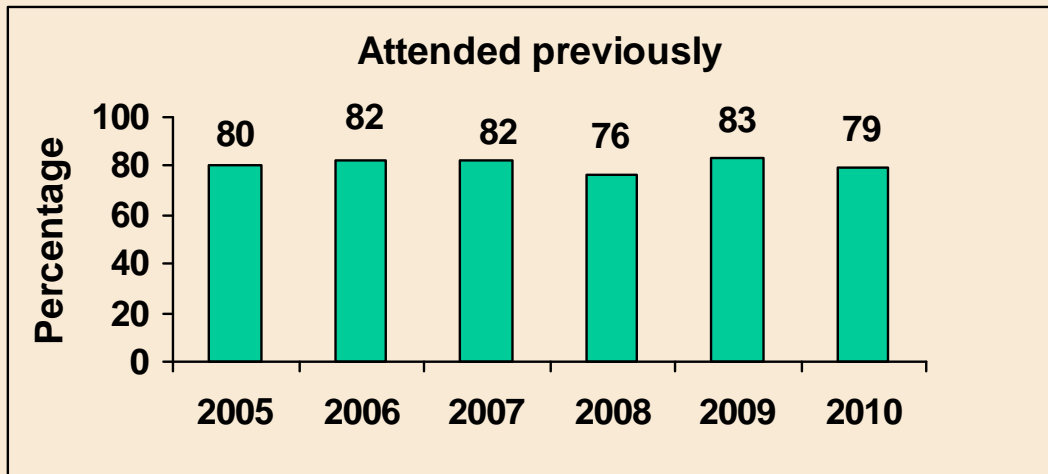


Transport to Event: Non-Residents

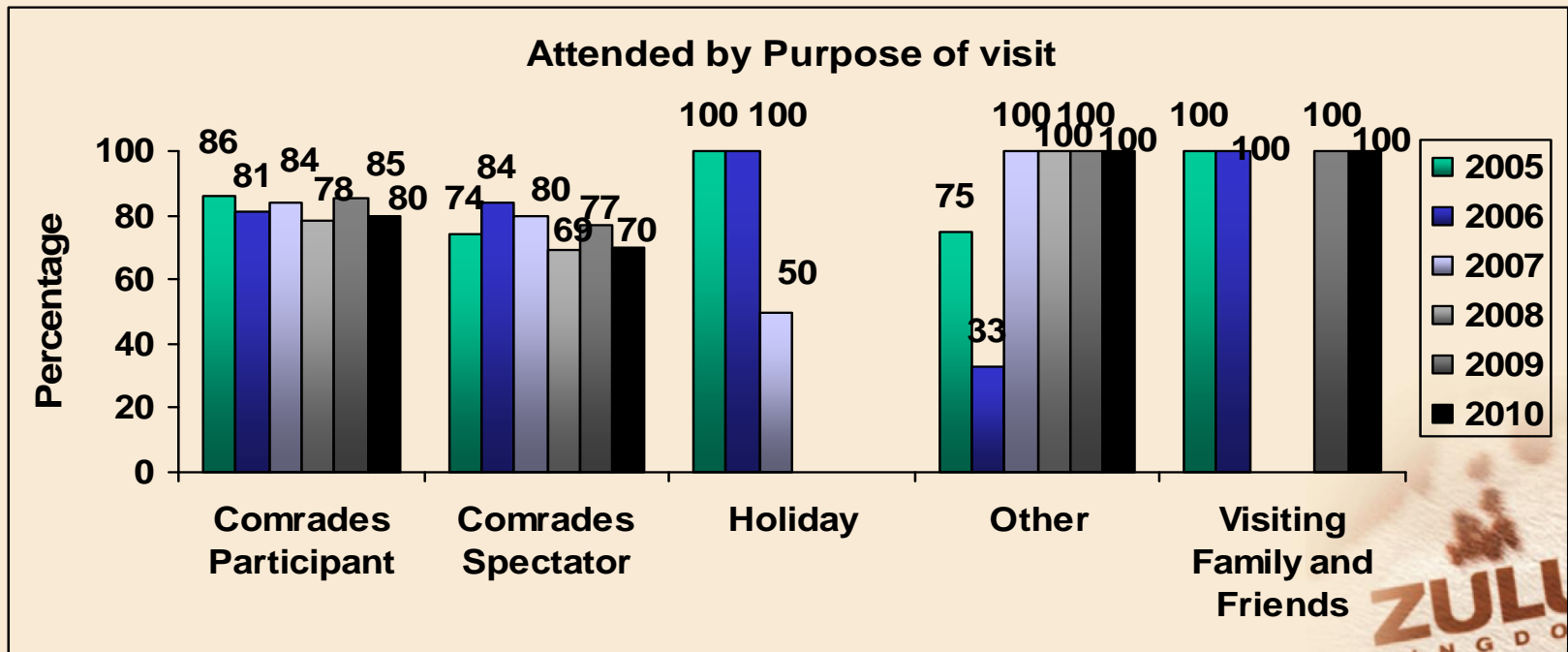


A Z-test of two independent sample proportions showed that there was no statistical significant difference in the proportion of respondents that used private vehicles when comparing 2009 and 2010.

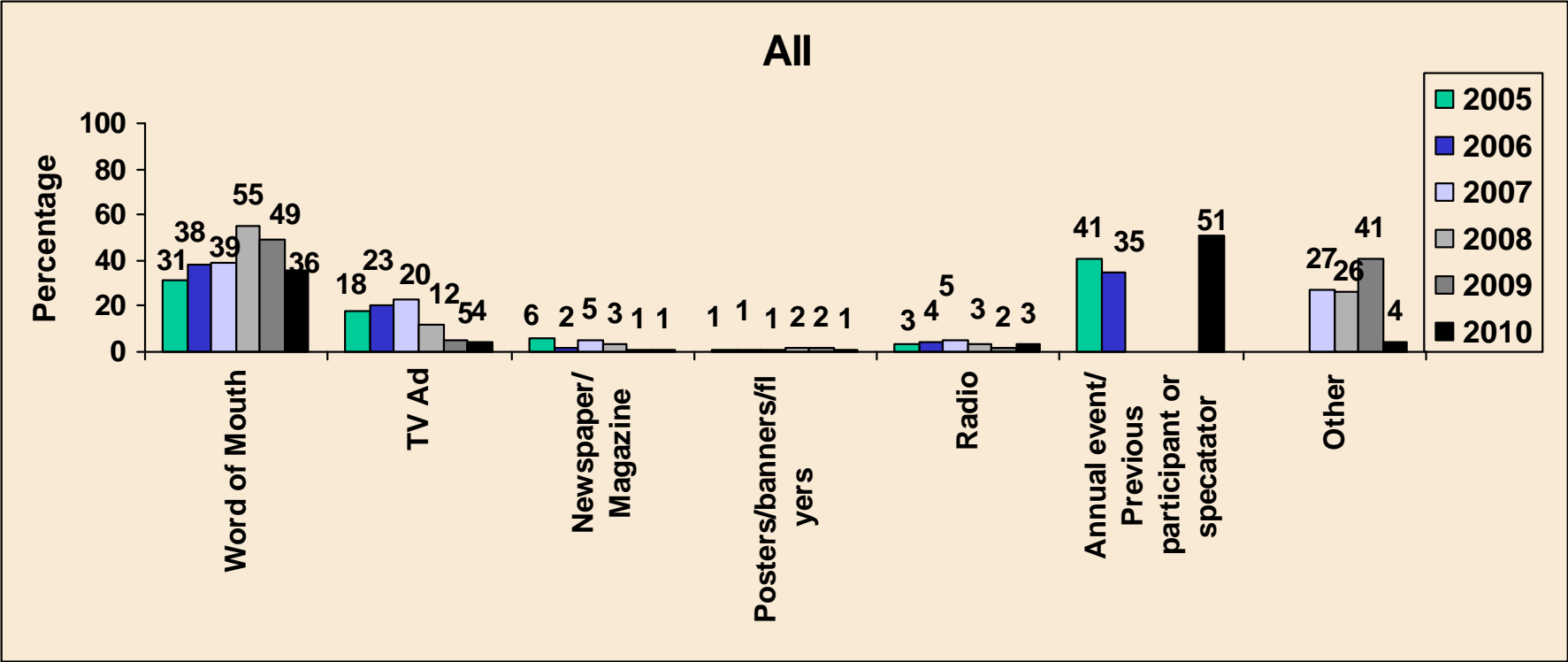
Attended in previous years?



A Z-test of two independent sample proportions showed no significant difference in the proportion of respondents who had attended in previous years when comparing 2009 and 2010.



Influenced to attend?



Influenced to attend?

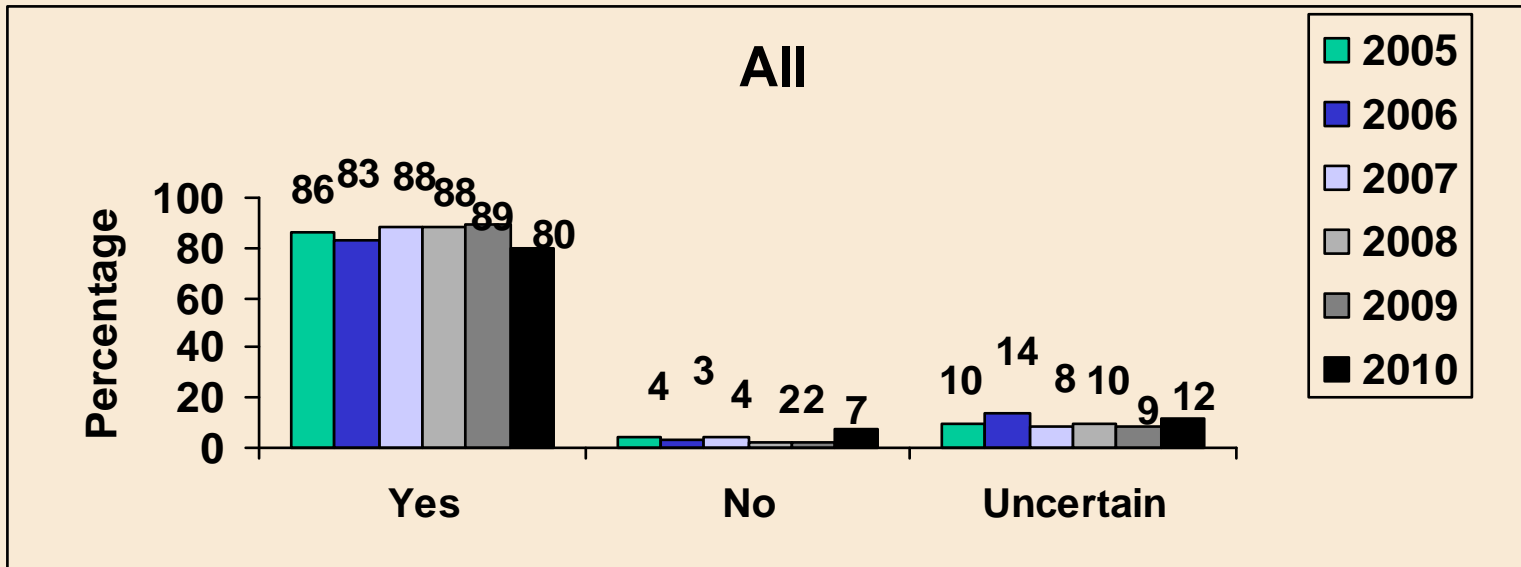
(cont'd)

By Media

	Newspaper/ Magazine						Poster/Banner/ Flyer						Radio					
	'05	'06	'07	'08	'09	'10	'05	'06	'07	'08	'09	'10	'05	'06	'07	'08	'09	'10
Participants %	6	1	5	2	1	1	1	1	1	1	1	1	3	3	5	3	2	3
Spectators %	6	4	4	8	0	2	1	1	1	-	6	-	3	3	5	2	2	4

	TV Ad						Word-of-Mouth						Annual Event/ prev. participant or spectator.					
	'05	'06	'07	'08	'09	'10	'05	'06	'07	'08	'09	'10	'05	'06	'07	'08	'09	'10
Participants %	21	26	24	13	7	4	20	29	32	56	45	32	47	39	33	-	31	56
Spectators %	15	16	22	12	20	4	43	46	49	54	54	53	33	30	19	-	22	30

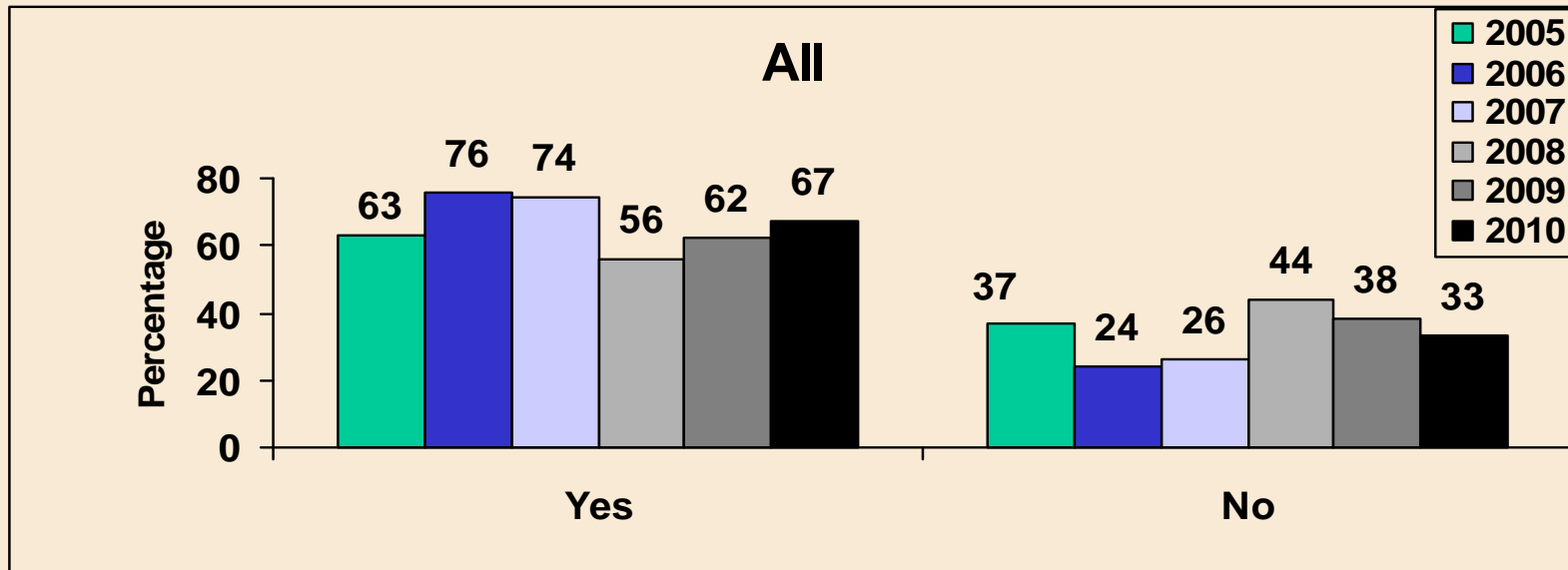
Attend again?



	Participant						Spectator					
	2005	2006	2007	2008	2009	2010	2005	2006	2007	2008	2009	2010
Yes	86%	85%	91%	88%	89%	80%	86%	83%	83%	84%	86%	85%
No	3%	0%	4%	3%	3%	9%	5%	4%	4%	-	2%	-
Uncertain	11%	15%	5%	9%	8%	11%	9%	9%	13%	16%	12%	15%

A Z- test of two independent sample proportions indicated that there was a significant difference in the proportion of respondents that said they would attend again when comparing 2009 and 2010. The probability of this assertion being false was 3%.

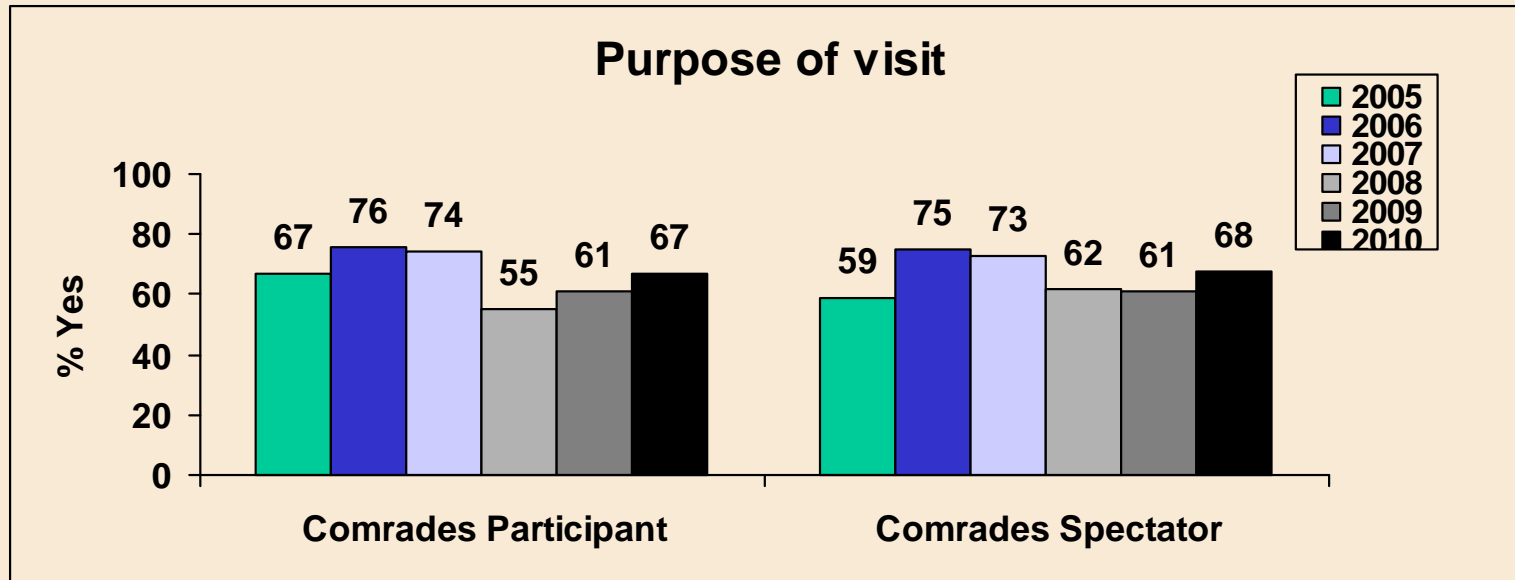
Familiar with Zulu Kingdom slogan?



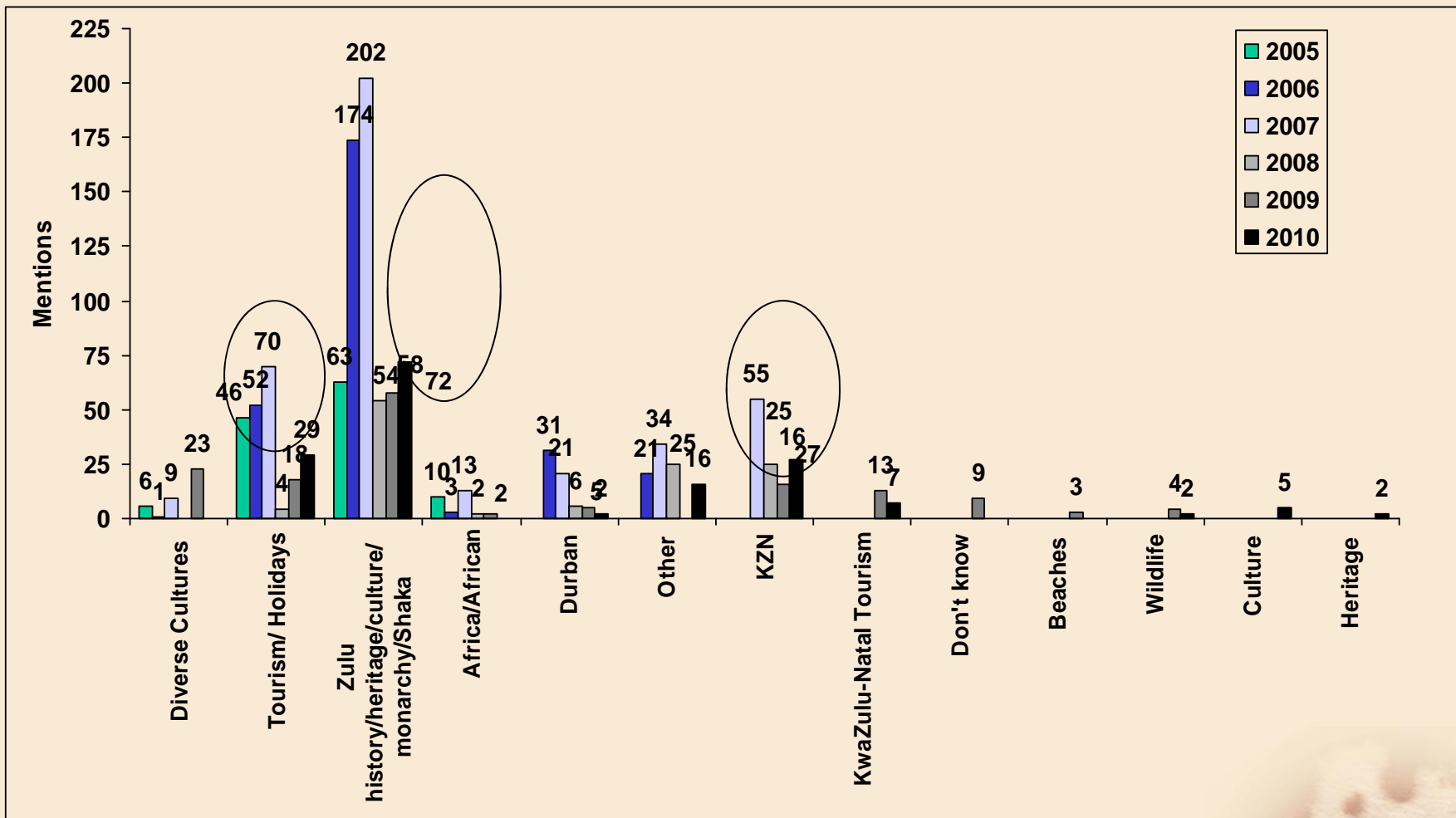
A Z-test of two independent sample proportion revealed that there was no significant difference in the proportion of respondents that were familiar with the slogan when comparing 2009 and 2010.



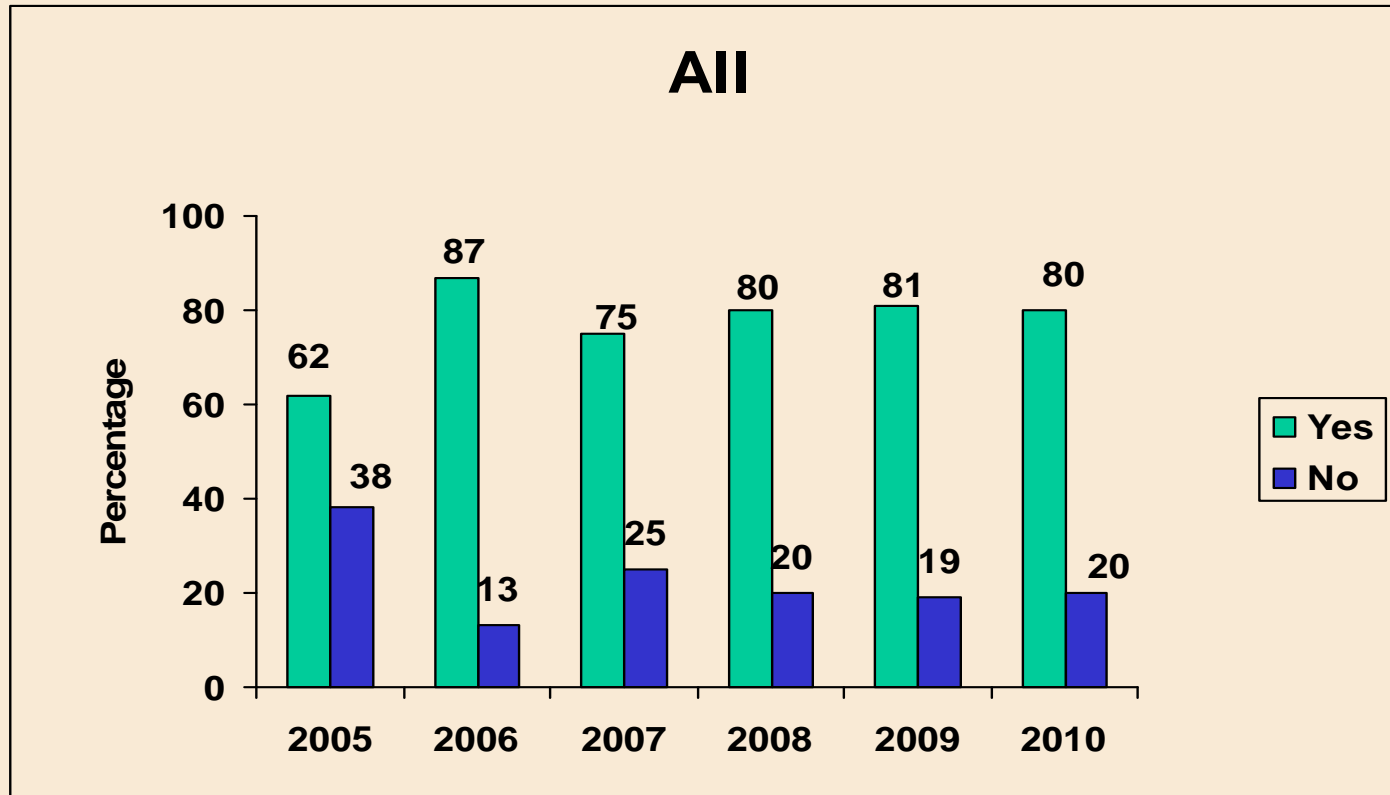
Familiar with Zulu Kingdom slogan?



Associations - Zulu Kingdom slogan: Core Mentions



Noted Zulu Kingdom logo?

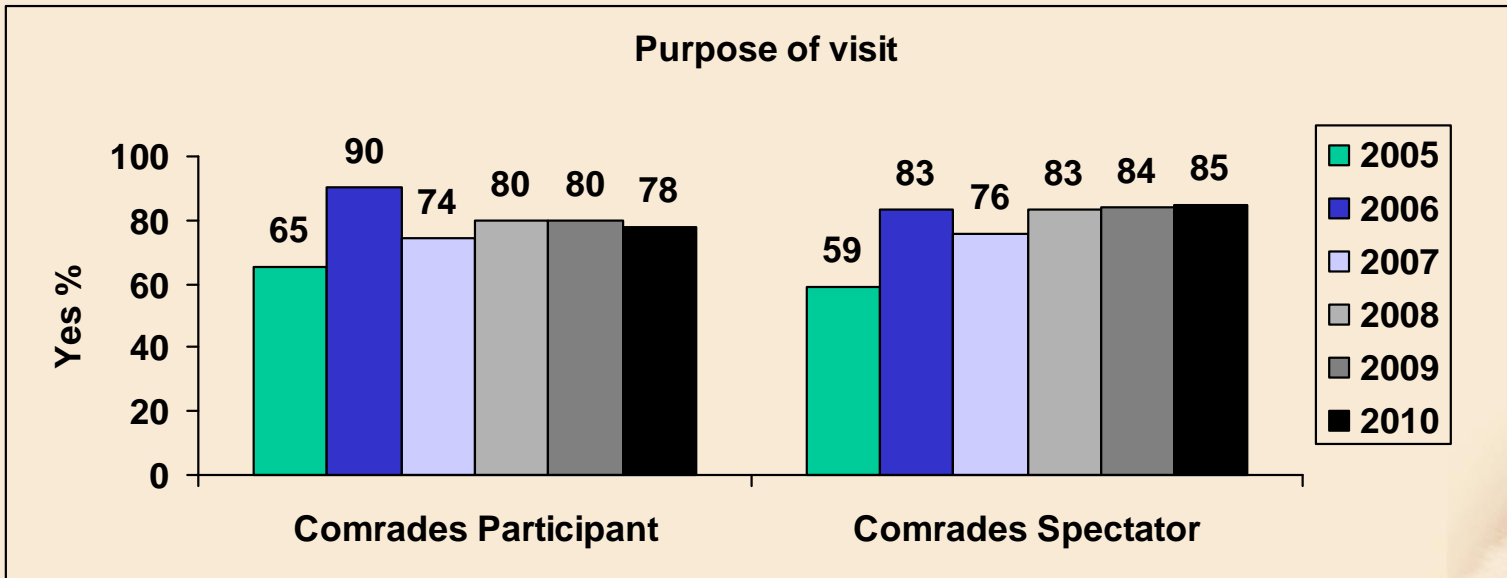


A Z-test of two independent sample proportion showed that there was no significant difference in the proportion of respondents that had noted the logo when comparing 2009 and 2010.



Noted Zulu Kingdom logo?

	Resident						Visitor					
	2005	2006	2007	2008	2009	2010	2005	2006	2007	2008	2009	2010
Yes	73%	92%	86%	90%	94%	95%	48%	83%	67%	78%	73%	73%
No	27%	8%	14%	10%	6%	5%	52%	17%	33%	22%	27%	27%



The noting of the logo by visitors remained unchanged between 2009 and 2010.



Where Zulu Kingdom logo noted?

	2005	2006	2007	2008	2009	2010
Billboard/ posters/banners	31	25	21	29	7	11
Brochures/pamphlets/flyers	4	7	6	13	5	8
Magazines	8	5	7	5	7	6
Newspapers	9	9	7	5	5	3
Clothing	3	6	4	18	10	12
Tourism Information Office	18	7	10	2	2	5
Internet	1	2	1	2	5	8
Television	15	24	21	9	28	14
Other	-	-	23	6		8
Airport	-	-	-	7	2	8
uShaka Marine	-	-	-	8	12	11
Durban	-	-	-	-	5	3
Beach	-	-	-	-	1-	
Comrades Expo	-	-	-	-	2	2
Previous Comrades	-	-	-	-	1-	
Banners	-	-	-	-	4-	
Bat Centre	-	-	-	-	1-	
Casino	-	-	-	-	4	1
Buses	-	-	-	-	1-	

A Z-test of two independent sample proportions indicated that there was a significant difference in the noting of the logo on television when comparing 2009 and 2010.



Findings

1. The majority of spectators who were interviewed were from outside the Durban region. A statistical test could not be performed as the responses were below the minimum number required to perform such tests.
2. 80% of those that were interviewed were participants. This was followed by Comrades spectators at 17%.
3. As regards province of residence, the majority of spectators were visitors from Gauteng (43%). This was followed by KZN at 30%. This could be an indication of the popularity of the event in Gauteng.
4. The majority of respondents were repeat participants/spectators. This was evidenced by 80% of participants and 70% of spectators who indicated they had attended in previous years. This suggests the supports that the marathon receives from both runners and spectators.
5. It is therefore not surprising that the main factor that influenced the respondents to attend the 2010 event was the fact that they had either participated or attended previously. 51% of them indicated they had been influenced by this factor. Word-of-mouth also continued to be an important factor in this regard at 36%. It is then clear that the traditional marketing media did not play a major role in influencing the respondents to attend or participate.

Findings

7. Following from the previous point, 56% of participants and 30% of spectators were influenced by previous attendance/participation. 32% of participants and 53% of spectators were influenced by word-of-mouth.
8. 80% of participants indicated they would attend again. There was however a significant decline in these numbers when comparing 2009 and 2010. In 2009, 89% of them had indicated their intention of attending again.
9. 99% of the respondents said they would recommend the Comrades Marathon to family and friends. Reasons for such a positive response were highlighted as:
 - The event is good for body exercise/fitness
 - The event brings people together
 - Good experience
 - It's a good sport. It's fun, enjoyable and exciting
10. A large proportion of respondents were familiar with the Zulu Kingdom slogan. A Z-test revealed no significant increase when comparing 2009 and 2010.
11. In terms of the logo, 80% of the respondents had noted it. A Z-test revealed no significant decrease in the noting of the logo when comparing 2009 and 2010. It was also found that the noting of the logo by visitors remained unchanged when comparing the two years. In both these years 73% of the visitors had noted the logo, while the 27% had not. There needs to be some work undertaken so as to increase the positive figure.

Findings

12. There was a significant decrease in the noting of the logo on television. In 2009, 28% of respondents has noted the logo on television, while only 14% did so in 2010.
13. There was a notable increase in numbers of international runners with regards to the Comrades. In 2010, there were 965 international runners compared to 606 in 2009. The 2010 event also included a significant number of entrants from countries which had not participated since 2007.
14. Although there were many more runners from other African countries at the Two Oceans when comparing it to the Comrades, it is however noticeable that there seemed to have been an increase in runners from countries such as Zimbabwe, Lesotho, Swaziland, Namibia and Botswana at the Comrades.

Recommendations

- There is a need to further increase the number of Comrades runners from other African countries. In this regard, TKZN could work with the Comrades Marathon Association to promote the event through the TKZN Regional Manager for Africa, Asia and Australia.
- The noting of the TKZN logo remained unchanged amongst visitors when comparing 2009 and 2010. In this regard, the TKZN branding should be positioned at strategic points or locations during the marathon.
- The event still falls short in terms of spectators coming from outside the province with the exception of Gauteng province. There is therefore an opportunity to increase the impact of the event to the region by working on increasing spectators from the rest of the country's provinces.