

Comrades 2009 Impact Assessment: Top Line Summary Report

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July 2009



Methodology

- Primary data:
 - Face to face survey – 295 respondents
 - Stratified probability sample – 228 participants and 67 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

	2005	2006	%	2007	%	2008	%	2009	%
KwaZulu-Natal	4011	3426	-15	3409	-0.5	3088	-9	3642	18
Central Gauteng	3480	3134	-10	3217	3	3068	-5	3600	17
Gauteng North	1578	1368	-13	1354	-1	1187	-12	1349	14
Western Province	948	834	-12	820	-2	736	-10	914	24
Mpumalanga	840	683	-19	642	-6	581	-10	680	17
Free State	541	489	-10	446	-9	428	-4	437	2
North West Province	418	344	-18	306	-11	283	-8	329	16
Limpopo Province	374	298	-20	321	8	305	-5	345	13
Eastern Province	312	262	-16	254	-3	256	1	256	0
Vaal Triangle	234	216	-8	155	-28	145	-6	168	16
Central North West	194	157	-19	164	5	155	-6	168	8
Boland	143	133	-7	107	-20	98	-8	127	30
Border	131	133	2	116	-13	122	5	121	-1
South West Districts	117	92	-21	101	10	93	-8	113	22
Griqualand West	68	52	-24			40		45	13
North West Cape	25	17	-32			41		41	0
Total	13414	11638	-13	11412	-2	10626	-7	12335	16

Nature and Extent of Comrades Participants

South African Regions - 2009

	MALE	FEMALE	TOTAL	PERCENTAGE
KwaZulu-Natal	3113	529	3642	28.1
Central Gauteng	2940	660	3600	27.8
Gauteng North	1070	279	1349	10.4
Western Province	686	228	914	7.1
Mpumalanga	587	93	680	5.3
Free State	359	78	437	3.4
Limpopo	296	49	345	2.7
North West Province	264	65	329	2.5
Eastern Province	210	46	256	2.0
Central North West	145	23	168	1.3
Vaal Triangle	143	25	168	1.3
Boland	95	32	127	1.0
Border	98	23	121	0.9
South West Districts	82	31	113	0.9
Griqualand West	39	6	45	0.3
North West Cape	36	5	41	0.3
Transkei	10	1	11	0.1
International	479	127	606	4.7
Total	10652	2300	12952	100

Nature and Extent of Comrades Participants

Country	Number 2007	% (2007)	Number 2008	% (2008)	Number 2009	% (2009)
KZN Only	3409	29	3088	29.05	3642	28.12
South Africa	11481	96.26	10631	94.8	12346	67.21
United Kingdom	84	0.70	116	1.0	106	0.51
Australia	47	0.39	74	0.66	66	0.51
United States	48	0.40	59	0.53	61	0.47
Zimbabwe	43	0.36	49	0.44	54	0.42
Brazil	-	-	44	0.39	48	0.37
Lesotho	22	0.18	32	0.29	34	0.26
Germany	24	0.20	31	0.28	31	0.24
Canada	-	-	14	0.13	14	0.11
Swaziland	13	0.11	14	0.13	15	0.12
Japan	12	0.10	14	0.13	17	0.13
Ireland	-	-	11	0.10	7	0.05
Russia	-	-	9	0.08	8	0.06
Switzerland	14	0.12	9	0.08	15	0.12
France	-	-	8	0.07	5	0.04
Namibia	-	-	7	0.06	8	0.06
Netherlands	-	-	6	0.05	6	0.05
United Arab Emirates	-	-	5	0.04	14	0.11
New Zealand	-	-	4	0.04	8	0.06
Israel	-	-	3	0.03	1	0.01

Nature and Extent of Comrades Participants (cont'd)

Country	Number 2007	% 2007	Number 2008	% 2008	Number 2009	% 2009
Chile	-	-	3	0.03	-	-
Zambia	-	-	2	0.02	4	0.03
Argentina	-	-	2	0.02	2	0.02
Austria	-	-	2	0.02	1	0.01
Belgium	-	-	2	0.02	-	-
Botswana	-	-	2	0.02	4	0.03
Ethiopia	-	-	2	0.02	1	0.01
Finland	-	-	2	0.02	-	-
Hong Kong	-	-	2	0.02	3	0.02
Indonesia	-	-	2	0.02	-	-
Malawi	-	-	2	0.02	4	0.03
Portugal	-	-	2	0.02	3	0.02
Saudi Arabia	-	-	2	0.02	2	0.02
Cameroon	-	-	1	0.01	1	0.01
China	-	-	1	0.01	1	0.01
Denmark	-	-	1	0.01	-	-
Kenya	-	-	1	0.01	15	0.12
Malaysia	-	-	1	0.01	-	-
Philippines	-	-	1	0.01	1	0.01
Poland	-	-	1	0.01	1	0.01
Spain	-	-	1	0.01	-	-

Nature and Extent of Comrades Participants (cont'd)

Country	Number 2007	% 2007	Number 2008	% 2008	Number 2009	% 2009
Sweden	-	-	1	0.01	4	0.03
Thailand	-	-	1	0.01	-	
Trinidad & Tobago	-	-	1	0.01	-	
Uganda	-	-	1	0.01	-	
England	-	-	-	-	21	0.16
Mozambique	-	-	-	-	5	0.04
Singapore	-	-	-	-	3	0.02
Scotland	-	-	-	-	2	0.02
Ghana	-	-	-	-	1	0.01
India	-	-	-	-	1	0.01
Malta	-	-	-	-	1	0.01
Mexico	-	-	-	-	1	0.01
Northern Ireland	-	-	-	-	1	0.01
Norway	-	-	-	-	1	0.01
Somalia	-	-	-	-	1	0.01
TOTAL	11837	100	11179	100	12952	100

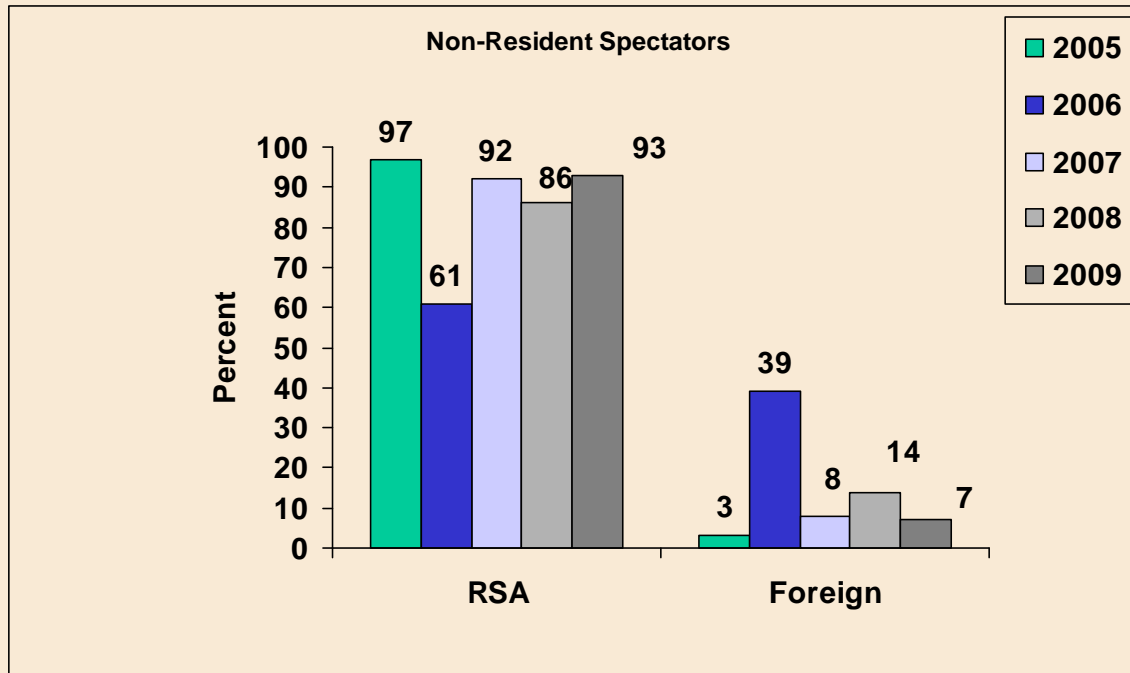
	2007	2008	2009
International Runners	307	548	606
Growth		79%	11%



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

Participants	2007 Ultra	2007 Half	2008 Ultra	2008 Half	2009 Ultra	2009 Half
Western Province	1804	5876	1639	6216	1592	6327
%	24%	55%	24%	55%	24%	55%
Non-Western Province	5377	4366	4639	4593	4559	4651
%	70%	41%	69%	41%	69%	40%
Other African Countries	123	187	79	134	71	177
%	1%	1%	1%	1%	1%	2%
International	352	323	336	270	342	295
%	5%	3%	5%	2%	5%	3%
Total	7656	10752	6693	11213	6564	11450

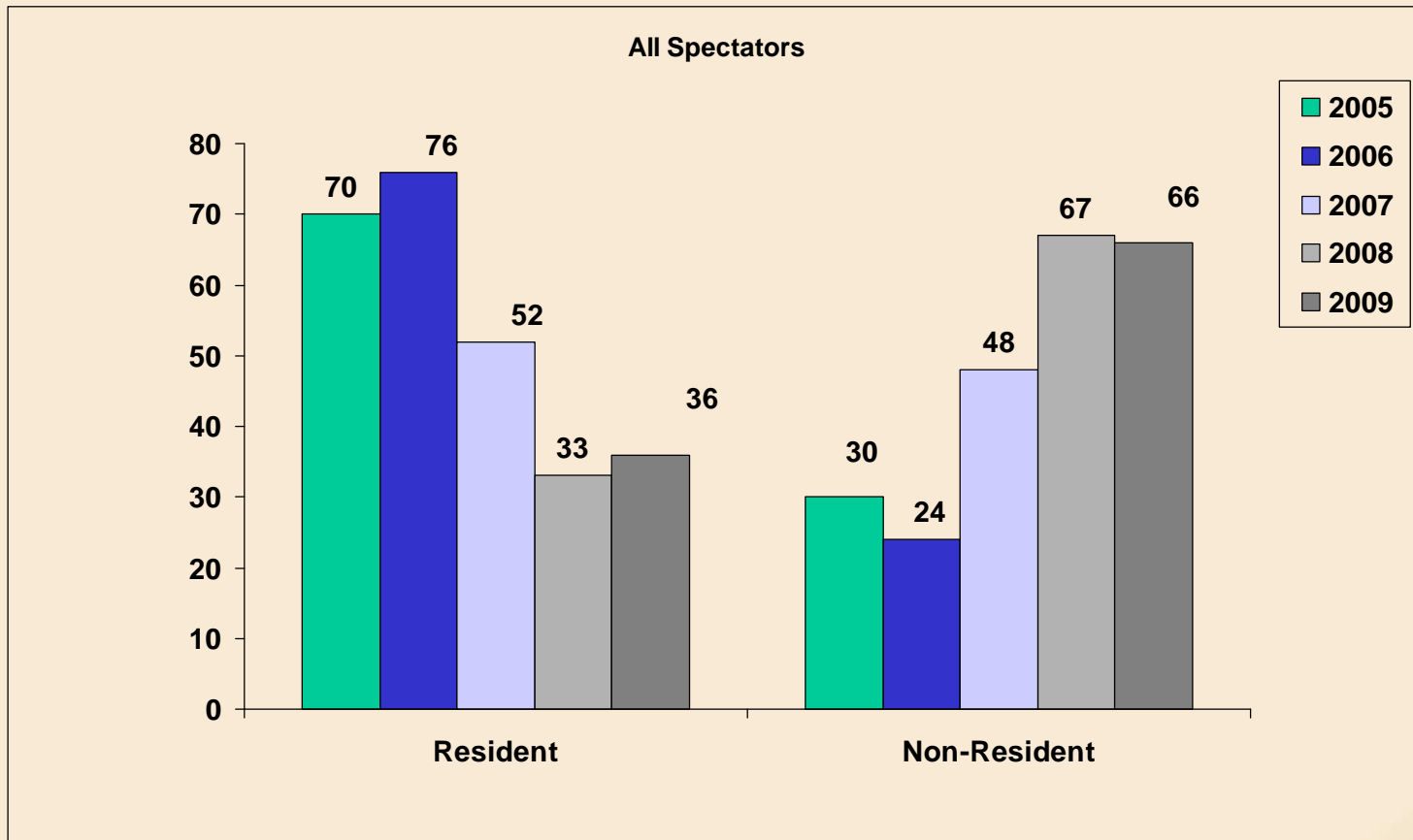
Nature of Spectator Respondents



Z-test of two independent sample proportions (with a P value 0.62) indicated a significant increase in South African non-resident spectators between 2008 and 2009.



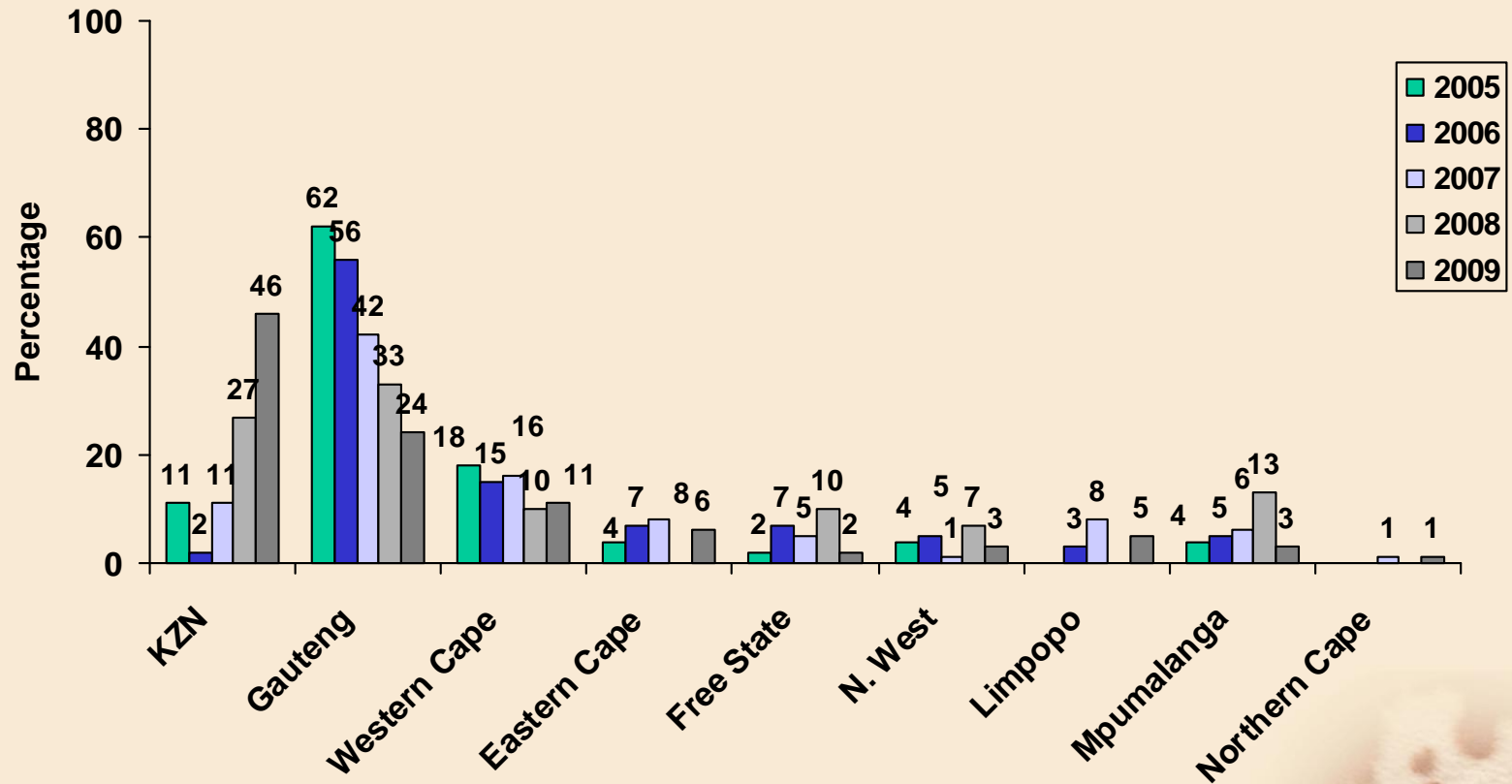
Nature of Spectator Respondents



A Z-test of two independent sample proportions revealed no statistically significant difference between 2008 and 2009 in terms of the nature of the spectators.

Nature of Spectator Respondents (cont'd)

South African Non-Resident Spectators



A Z-test of two independent sample proportions ($p < 0.000$) indicated a significant decline in the number of non-resident spectators from Gauteng between 2008 and 2009 and increase in non-resident spectators from KwaZulu-Natal in 2009 when compared to 2008.

Average Spend

	2007	2008	2009
Average total spend	R2 711.21	R6 241.82	R2 271.45
Non-residents participants	R3 799.07	R8 598.20	R3 106.71
Resident participants	R702.27	R528.93	R825.58
Non - resident spectators	R4 452.63	R3 297.25	R2 750.00

An ANOVA test indicated a statistically significant decrease in the average total spend between 2008 and 2009.

Estimated Economic Impact: Resident and Non-resident Participants

Non-resident participants

- N = 9 310 (12 952 - 3 642*)
- Mean: R3 106.71
- Count: 151
- Std Dev: R4 406.90
- Std Error at 95% level of confidence spend between R2 455.98 and R3 757.44
- Estimated direct spend **excluding** Std Error = R22,856,172.87
- Estimated direct spend of at least R28,923,457.07 and as much as R34,981,748.71

Resident participants

- N = 3 642
- Mean: R528.90
- Count: 29
- Std Dev: R577.40
- Std Error @ 95% level of confidence spend between R532.68 and as much as R1 118.48.
- Estimated direct spend **excluding** Std Error = R1,633,243.20
- Estimated direct spend of at least R955,022.05 and as much as R2,311,464.35

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



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

Non-resident spectators

- $N = 31\ 052$ ($60\ 000 - 12\ 952^* \times 66\%$)
- Mean: R 2 750.00
- Count: 27
- Std Dev: R2 163.46
- Std Error @ 95% level of confidence spend between R1 894.16 and as much as R3 605.84.
- Estimated direct spend excluding Std error = R85,393,000.00
- Estimated direct spend taking Std error of mean into account: At least R58,817,524.63 and as much as R111,968,475.40.

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

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

*participants

Estimated Economic Impact: Participants and Non-Resident Spectators

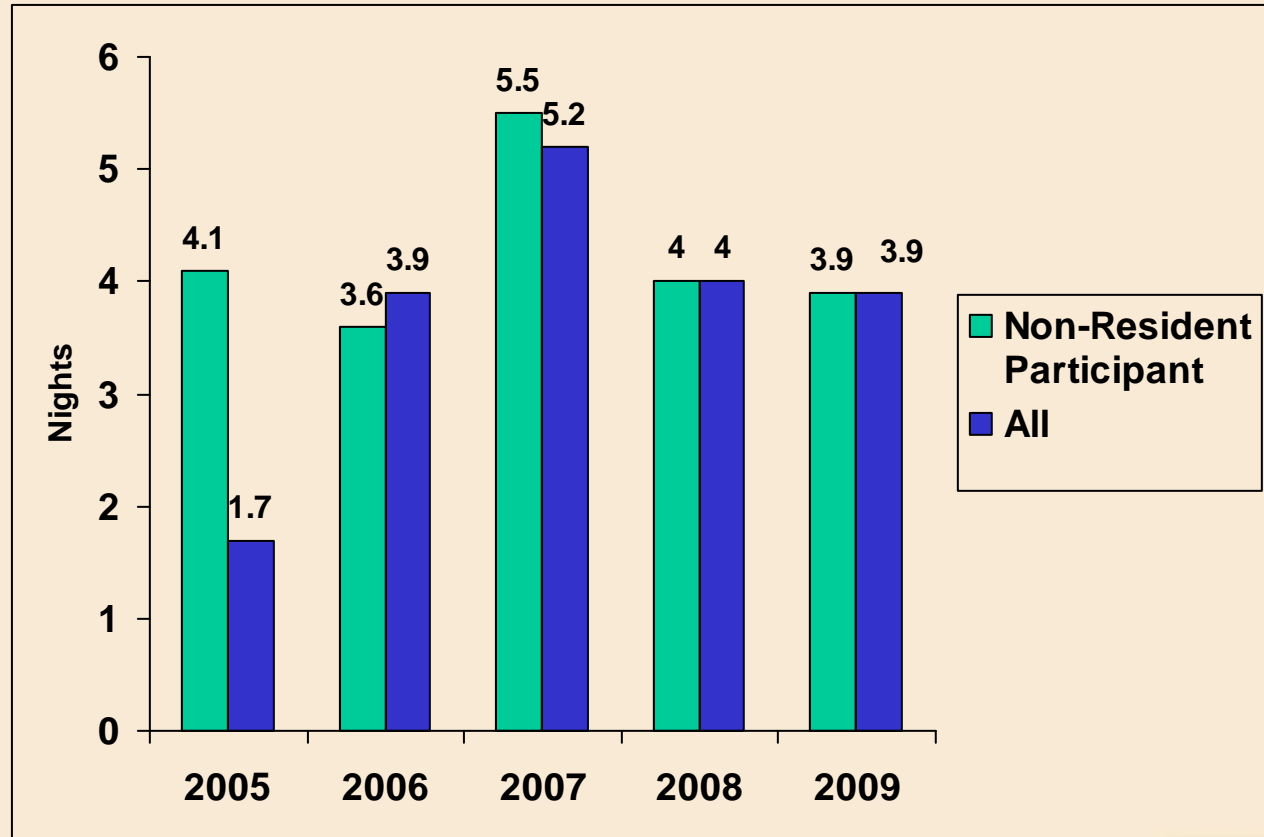
	2008	2009
Non-resident participants	*Low – R38 701 917.37 **Middle – R69 568 036.20 ***High - R100 434 155.03	Low – R22 865 172.87 Middle – R28 923 457.07 High – R34 981 748.71
Resident participants	*Low – R955 022.05 **Middle – R1 633 243.20 ***High – R2 311 464.35	Low - R1 940 036.95 Middle - R3 006 774.38 High - R4 073 511.81
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
Total 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
Indirect 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

*Low estimate taking into account a 95% standard error

** Medium estimate not taking into account a 95% standard error

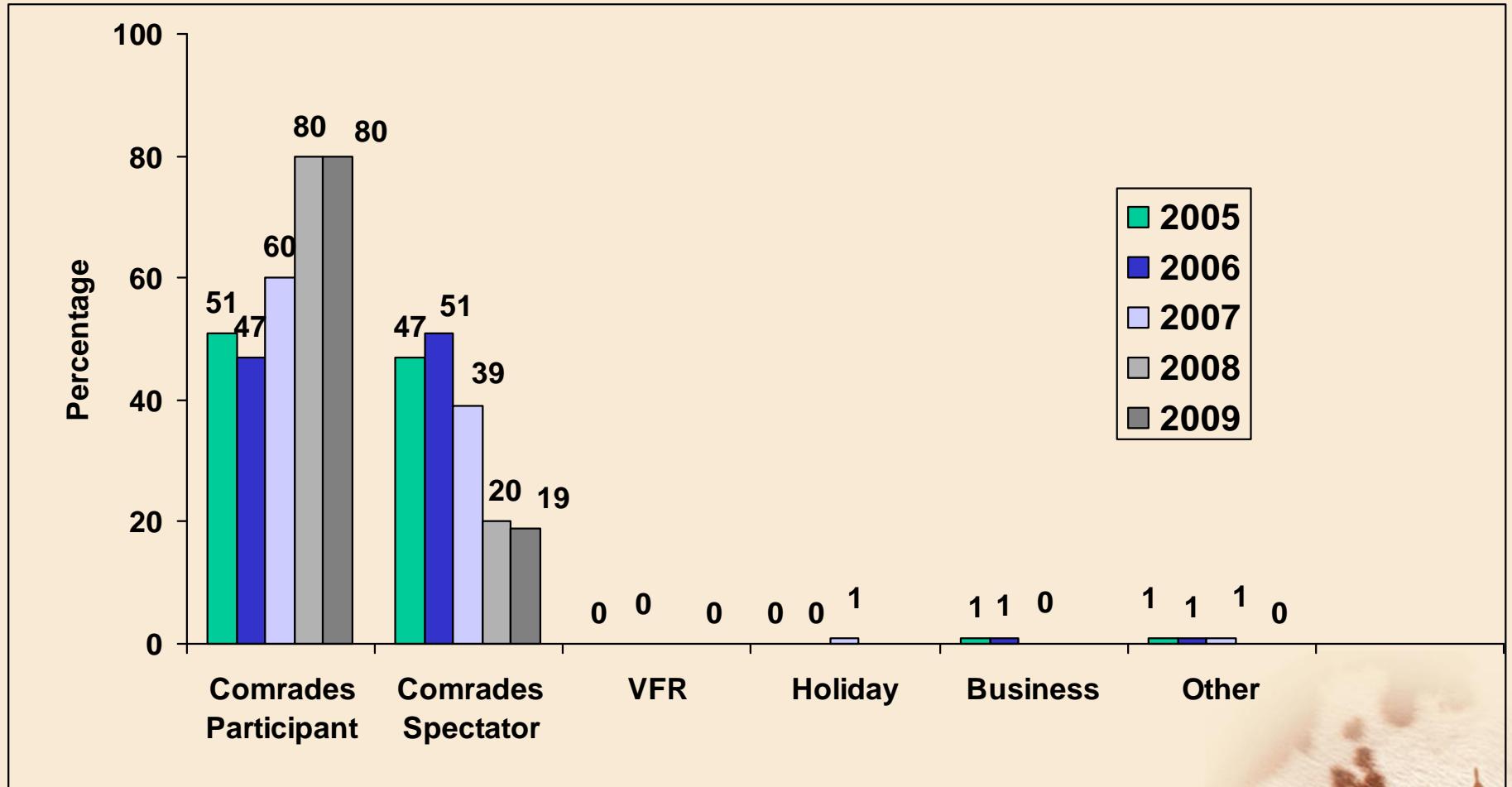
***High estimate taking into account a 95% standard error

Average Length of Stay

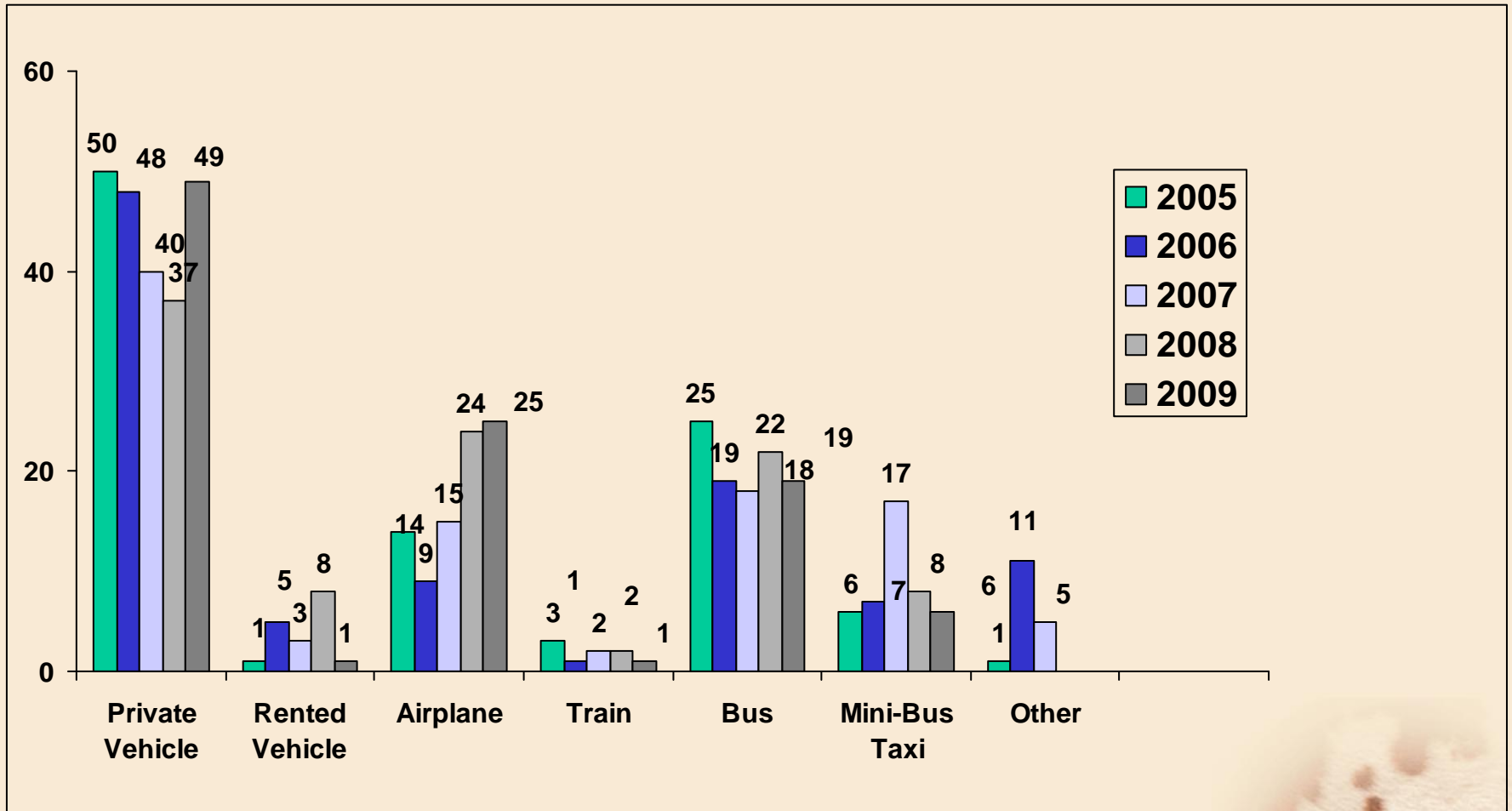


2009	Mode	Median	Range
All	3 nights	5 nights	9 nights

Primary reason for visiting area where event took place



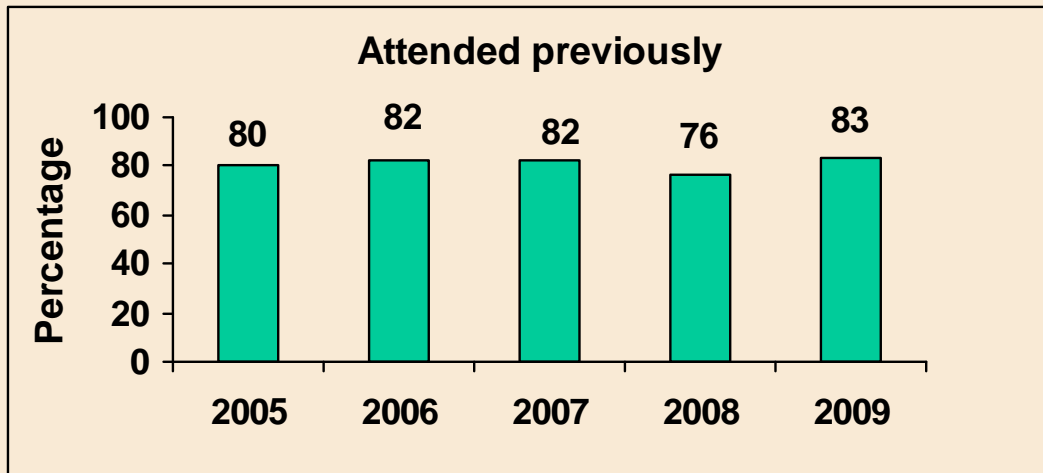
Transport to Event: Non-Residents



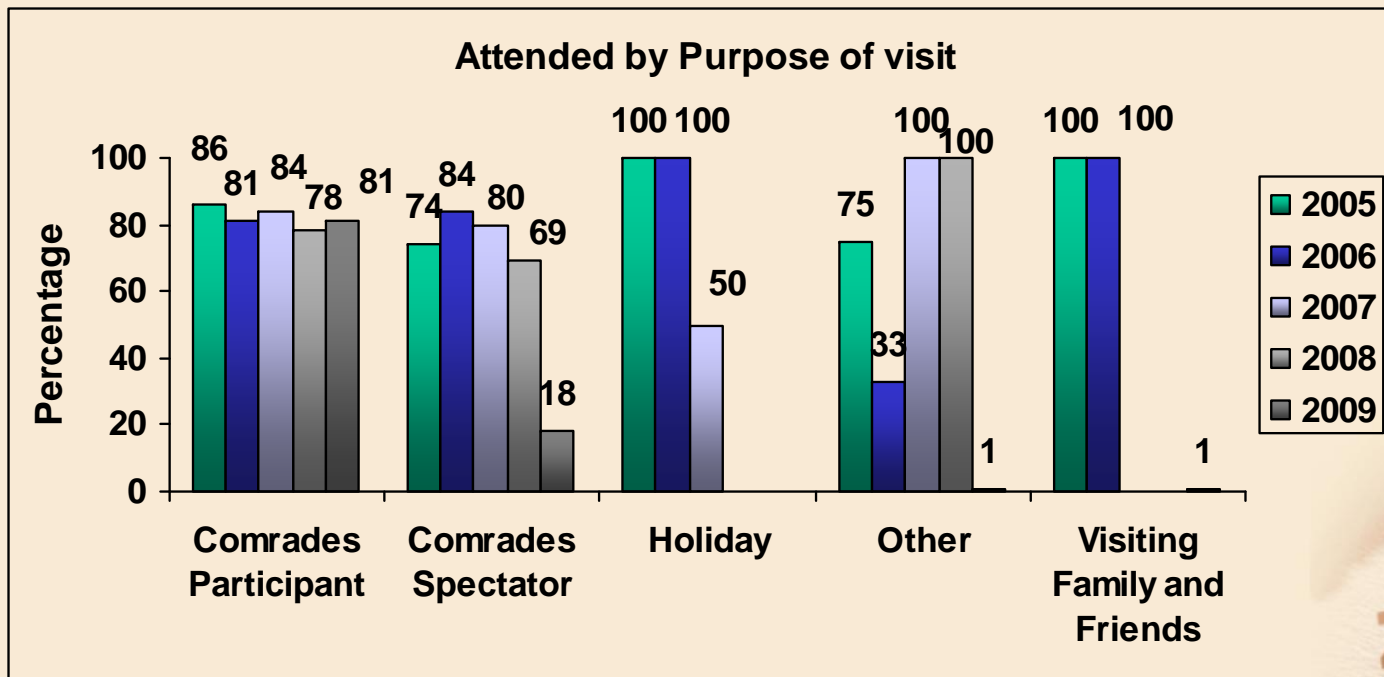
A Z-test between two values of independent sample proportions (with a p value of 0.39) suggests a significant increase in the use of private vehicles to the event between 2008 and 2009.

There was no significant increase in the use of airplanes between 2008 and 2009.

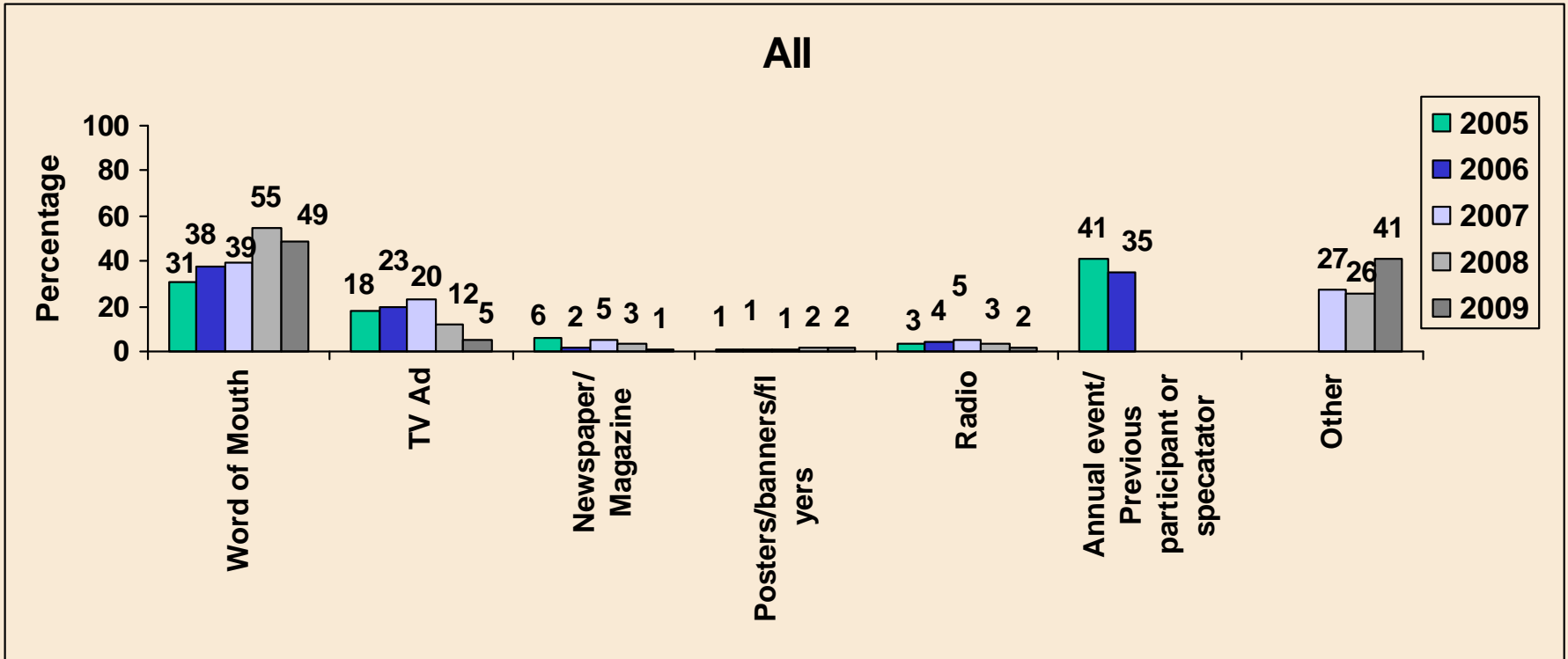
Attended in previous years?



A Z-test of two independent sample proportions ($p < 3.38$) indicated a significant increase in the percentage of all the respondents who attended in previous years between 2008 and 2009.



Influenced to attend?



A Z-test of two independent sample proportions ($p < 0.24$) indicated a significant decline in the percent of respondents who were influenced by TV advertisements to attend the event between 2008 to 2009. There was no significant decline in the influence of word of mouth or attending in previous years between the same two years.



Influenced to attend?

(cont'd)

By Media

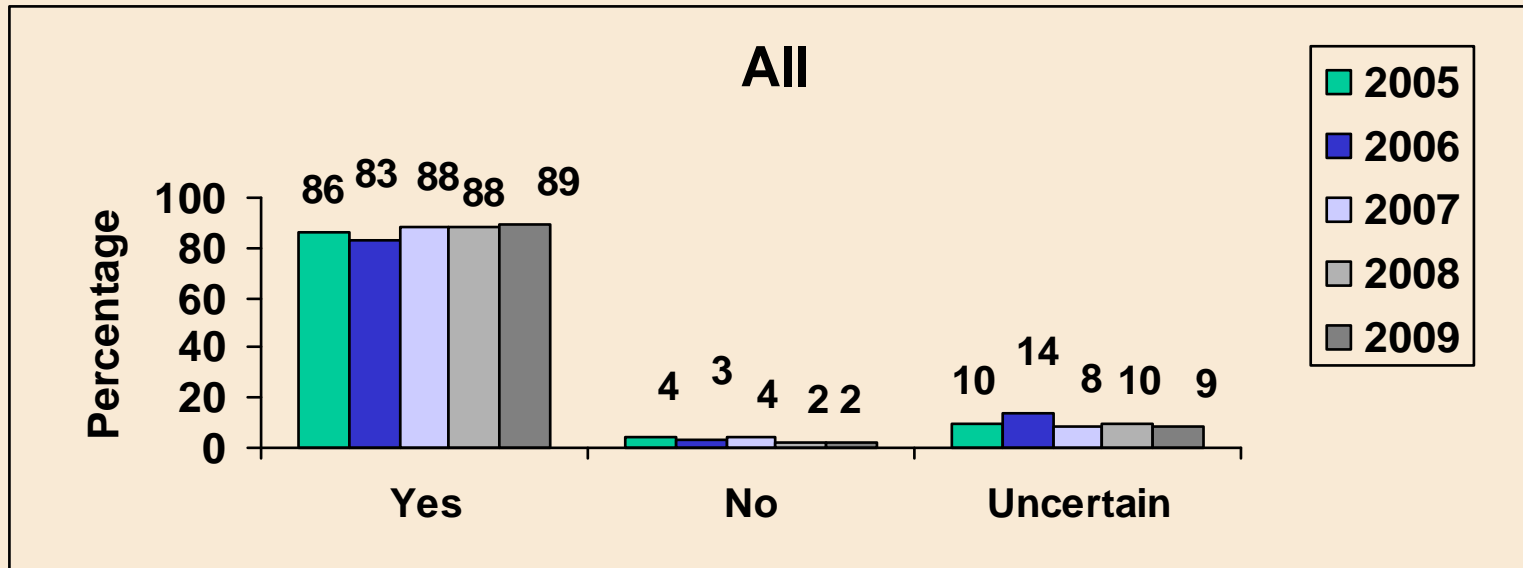
	Newspaper/ Magazine					Poster/Banner/ Flyer					Radio				
	'05	'06	'07	'08	'09	'05	'06	'07	'08	'09	'05	'06	'07	'08	'09
Participants %	6	1	5	2	1	1	1	1	1	1	3	3	5	3	2
Spectators %	6	4	4	8	0	1	1	1	-	6	3	3	5	2	2

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

	Other		To Support
	'08	'09	'09
Participants %	25	7	
Spectators %	25	-	14



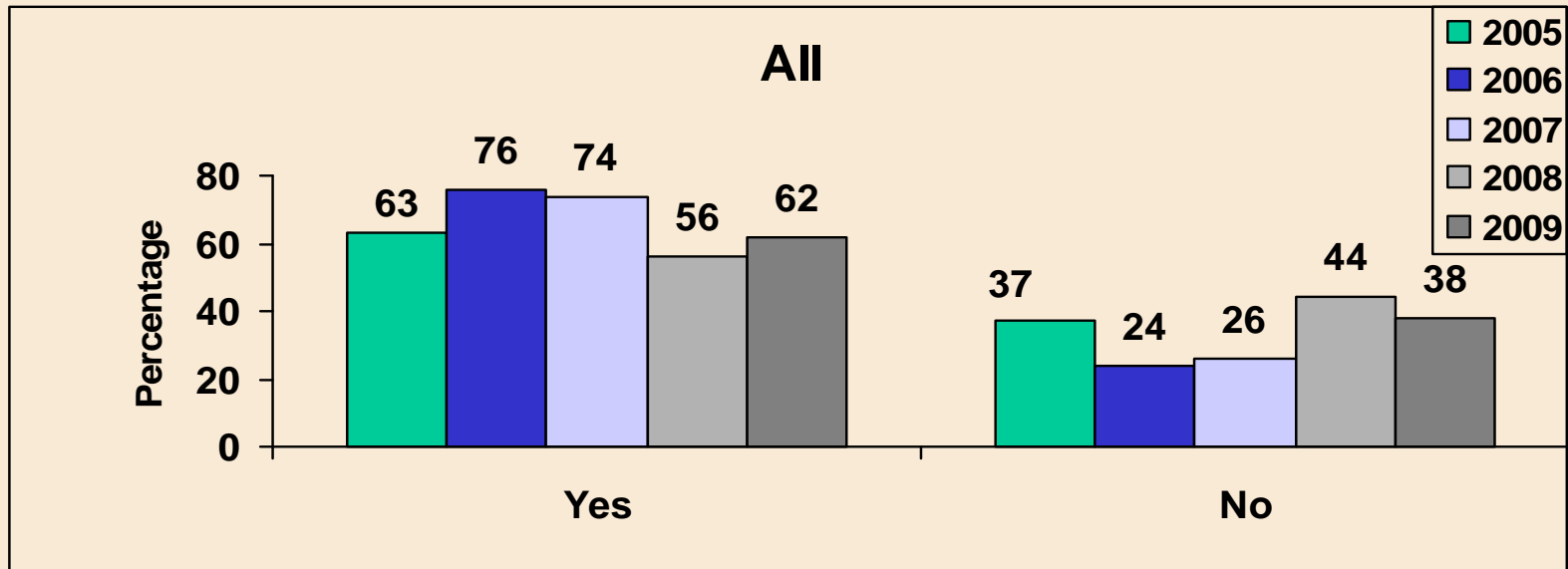
Attend again?



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

A Z- test of two independent sample proportions indicated no significant difference in the proportion of respondents who would attend again between 2008 and 2009.

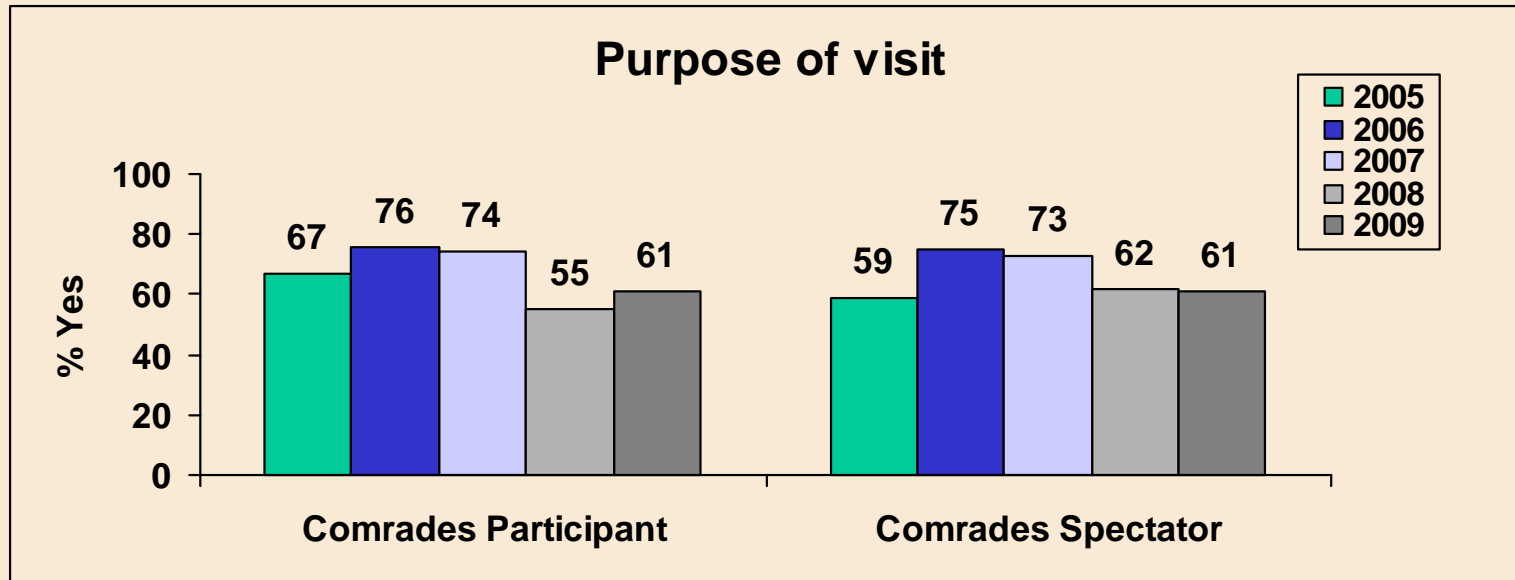
Familiar with Zulu Kingdom slogan?



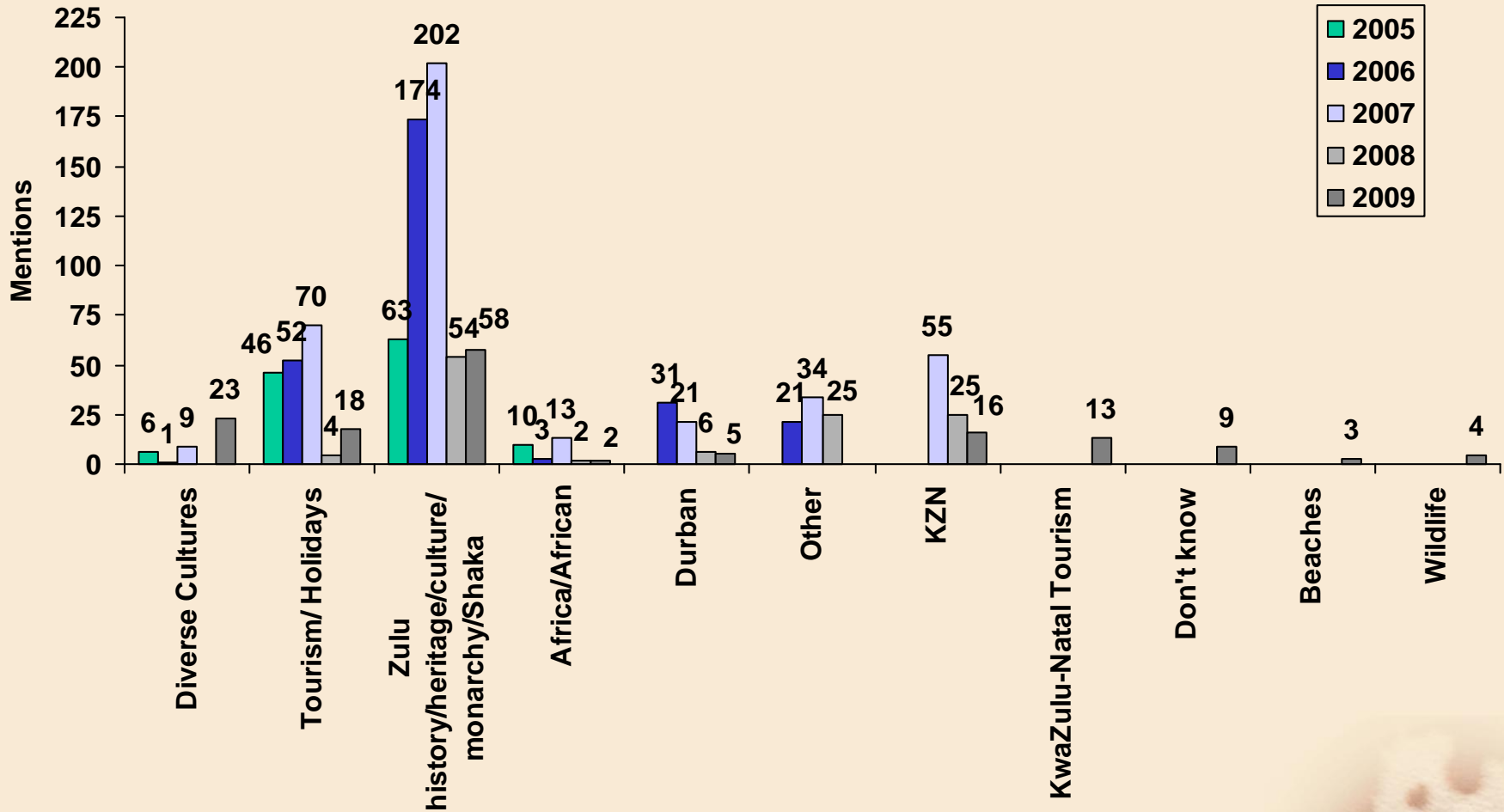
There was no significant increase in the number of respondents who were familiar with the Zulu Kingdom slogan between 2008 and 2009.



Familiar with Zulu Kingdom slogan?



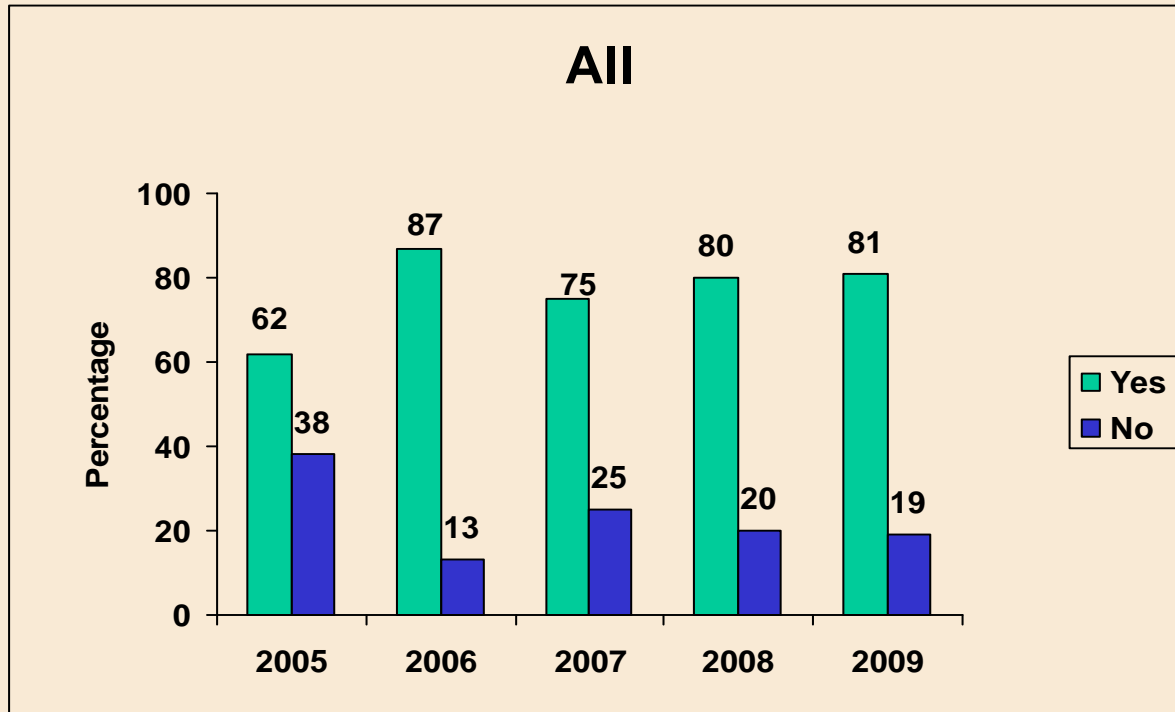
Associations - Zulu Kingdom slogan: Core Mentions



A Z-test of two independent sample proportions ($p < 0.000$ and $p < 0.77$) shows a statistical increase in the linking of the Zulu Kingdom slogan to *tourism/holidays*. There is a statistical decrease ($p < 0.77$) in the linking of the slogan to KwaZulu-Natal.



Noted Zulu Kingdom logo?



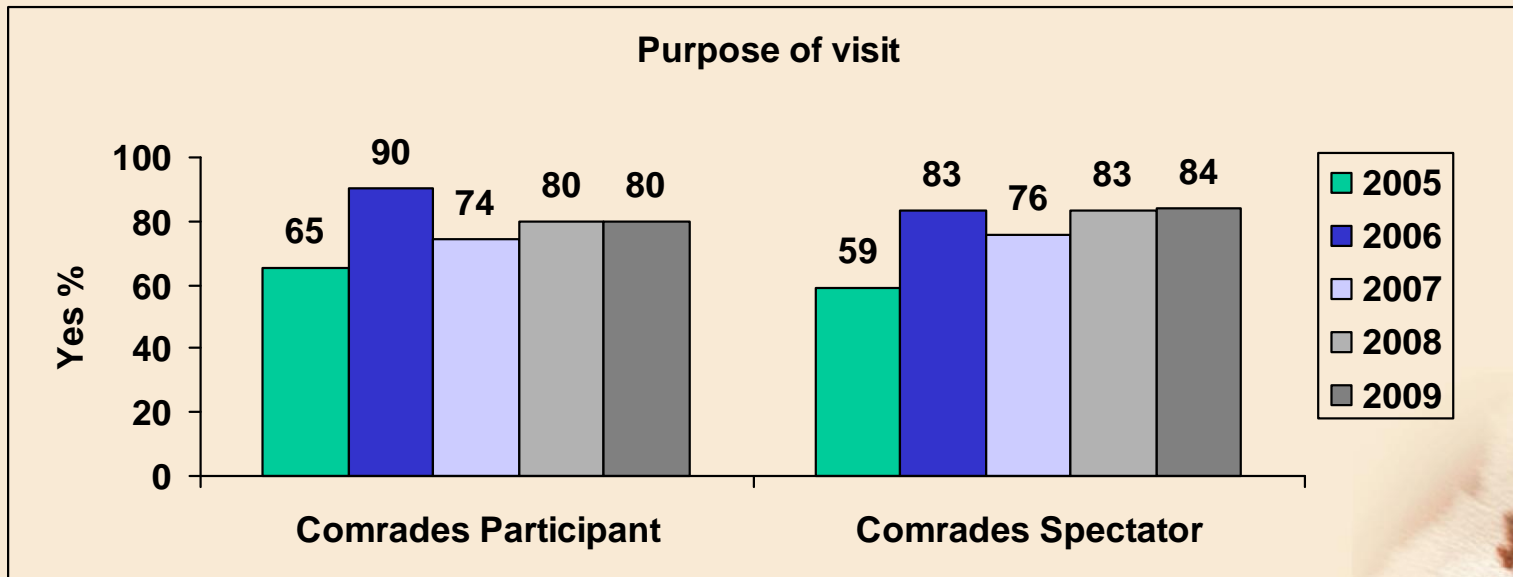
There was no significant increase in the noting of the Zulu Kingdom logo between 2008 and 2009.



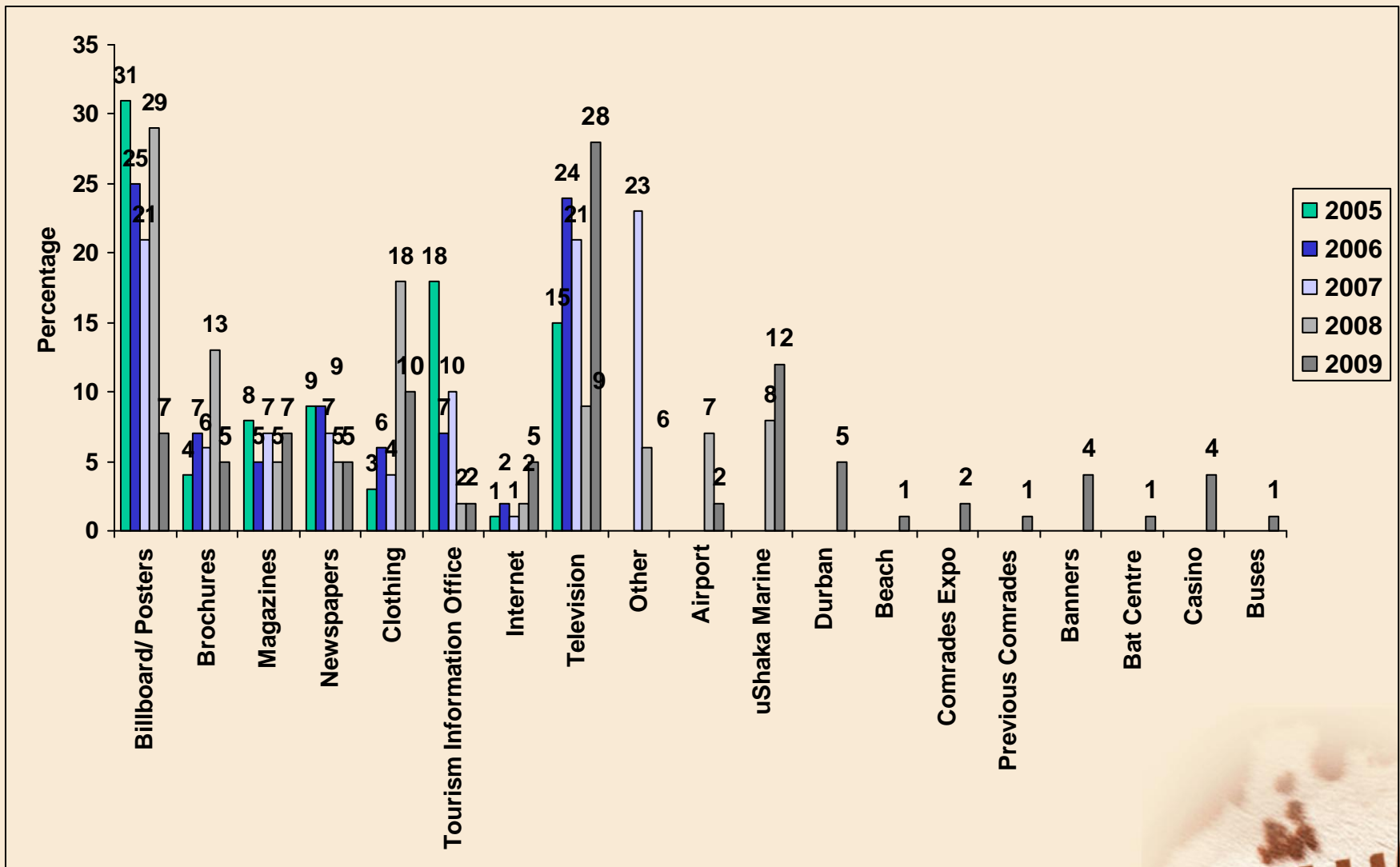
Noted Zulu Kingdom logo?

	Resident					Visitor				
	2005	2006	2007	2008	2009	2005	2006	2007	2008	2009
Yes	73%	92%	86%	90%	94%	48%	83%	67%	78%	87%
No	27%	8%	14%	10%	6%	52%	17%	33%	22%	13%

A Z-test of two independent sample proportions ($p < 0.46$) indicated a statistical significance in the increase of visitor noting of the Zulu Kingdom logo between 2008 and 2009.



Where Zulu Kingdom logo noted?



Z-tests of two independent sample proportions indicated significant declines in the noting of the logo on billboard/posters, brochures and clothing between 2008 and 2009. However, there were significant increases in the 'television' and 'uShaka Marine' categories within the same period.



Findings

- The number of international runners has increased significantly from 307 (2.59%) in 2007 to 606 (4.68%) in 2009. This includes a significant increase in participants from Kenya. This suggests that the focus in terms of marketing to attract international runners is bearing results.
- The percentage of international runners who took part in the event was almost 5%, comparable to the percentage of international participants in the Two Oceans Marathon.
- The number of runners from Gauteng was virtually the same as that from KwaZulu-Natal. This indicates that the Comrades is very popular in Gauteng despite the economic downturn. This creates an opportunity to increase participation from Gauteng when the economy improves.
- According to a Z-test there was a significant decline of the number of non-resident spectators from Gauteng between 2005 and 2009. This may be an indication that fewer runners are travelling with their families.
- A Z-test indicated that there was a significant increase in the overall number non-resident spectators who were at the event. This may be attributed to the increase from KwaZulu-Natal.
- The average spend at the Comrades has decreased when compared to 2008. .
- A higher percentage of locals (94%) noted the Zulu Kingdom logo when compared to (87%) of visitors.



Findings

- A Z-test revealed a significant increase in the use of private vehicles to get to the event this can be attributed to the adverse economic climate.
- A Z-test indicated a significant increase from 2008 to 2009 in the percentage of respondents who had attended the event in previous years. The high percentage (83%) of respondents who returned created a significant, reliable target market.
- There was a significant decrease in the number of respondents who were influenced to attend the event by television advertisements. There may have been no advertisements on television or television advertisements did have a link to the Comrades Marathon.
- Many respondents still associated the Zulu Kingdom slogan with Zulu culture in general and Zulu heritage, monarchy and culture was still significant. When compared with the Midmar Mile, where there is also a significant Gauteng presence, and there was a significant increase in associating the slogan with tourism/holidays.
- There was a significant increase in noting the logo on television and at uShaka Marine Park. The information office at uShaka may have played an important role in the increased recognition of the logo.
- 99% of the respondents were in KwaZulu-Natal specifically to attend the event as participants or spectators. This presents an opportunity for showcasing what else can be done in the province with a view to increase their stay and spread in the province.

Recommendations

- Travel packages could be put together as was done for the Kaiser Chiefs vs Manchester City soccer match in Durban. As part of the Sho't Left campaign, Thompsons offered a fun bus to Durban for two nights from the 20th – 22nd July 2009. This would encourage the increase of non-resident spectators from outside of KwaZulu-Natal, as well as international participants to attend the event.
- Tourism KwaZulu-Natal should take a more aggressive marketing approach at the Comrades Marathon in view of the fact that as many visitors from Gauteng participate in the Comrades as those from KZN. This marketing can positively influence a decision of where to take the family for the December holiday.
- The previous recommendation may also help to create a better understanding of the Zulu Kingdom brand.
- In light of the declining spectator numbers from Gauteng, there is a need to increased marketing of the Comrades experience in this area.