

Splashy Fen Music Festival: Comparative Summary Report 2007 - 2011



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Objectives

- To determine the profile of visitors to the Splashy Fen music festival in Underberg from 2007 to 2011.
- To determine what factors influenced their decision to attend this event.
- To ascertain their travel and activity patterns over the period of this event.
- To determine their perceptions of the overall organisation of the event.
- To determine the overall impact of the event.

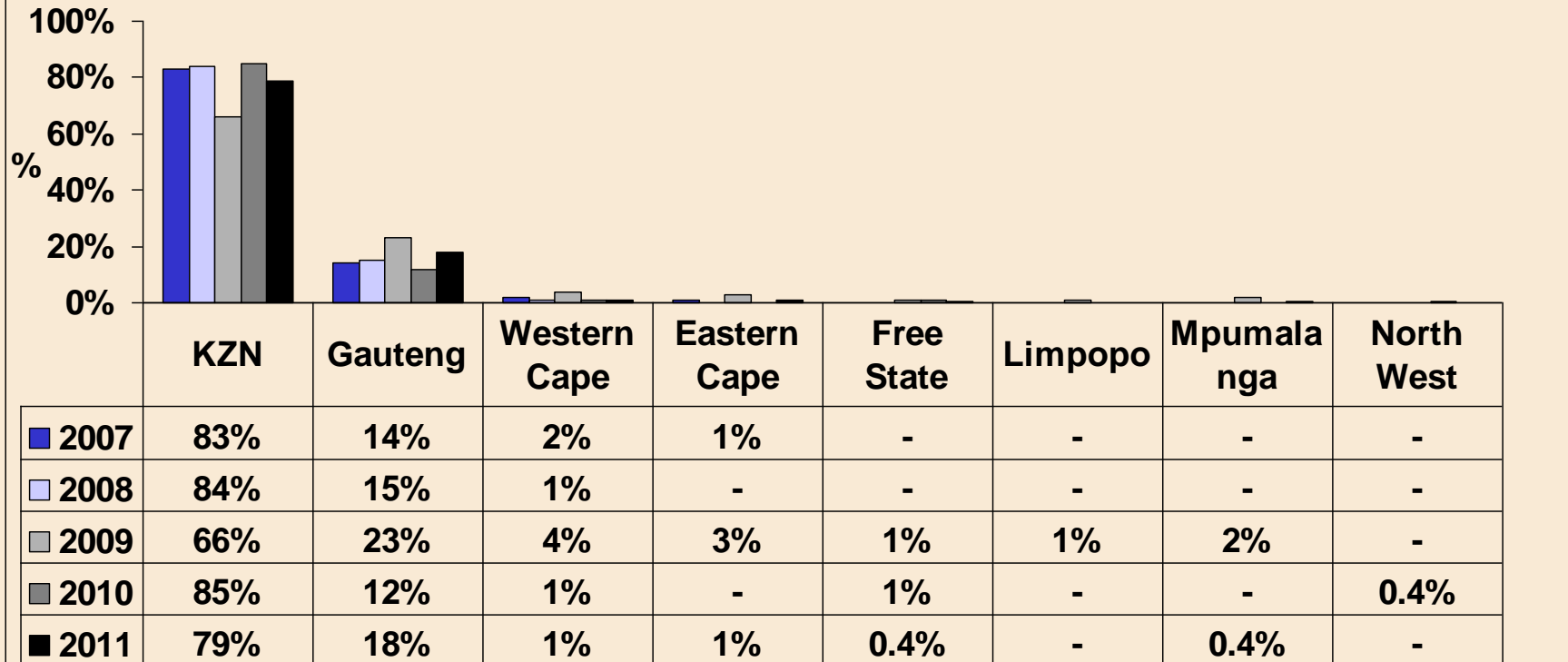
Methodology

- 292 face to face interviews based on a set questionnaire.
- Probability sample design.
- Stratified allocation by day.
- Respondents randomly selected.
- The survey was conducted from the 22nd – 24th of April 2011.



Visitors' Residence

Domestic Spectators: Province of Residence



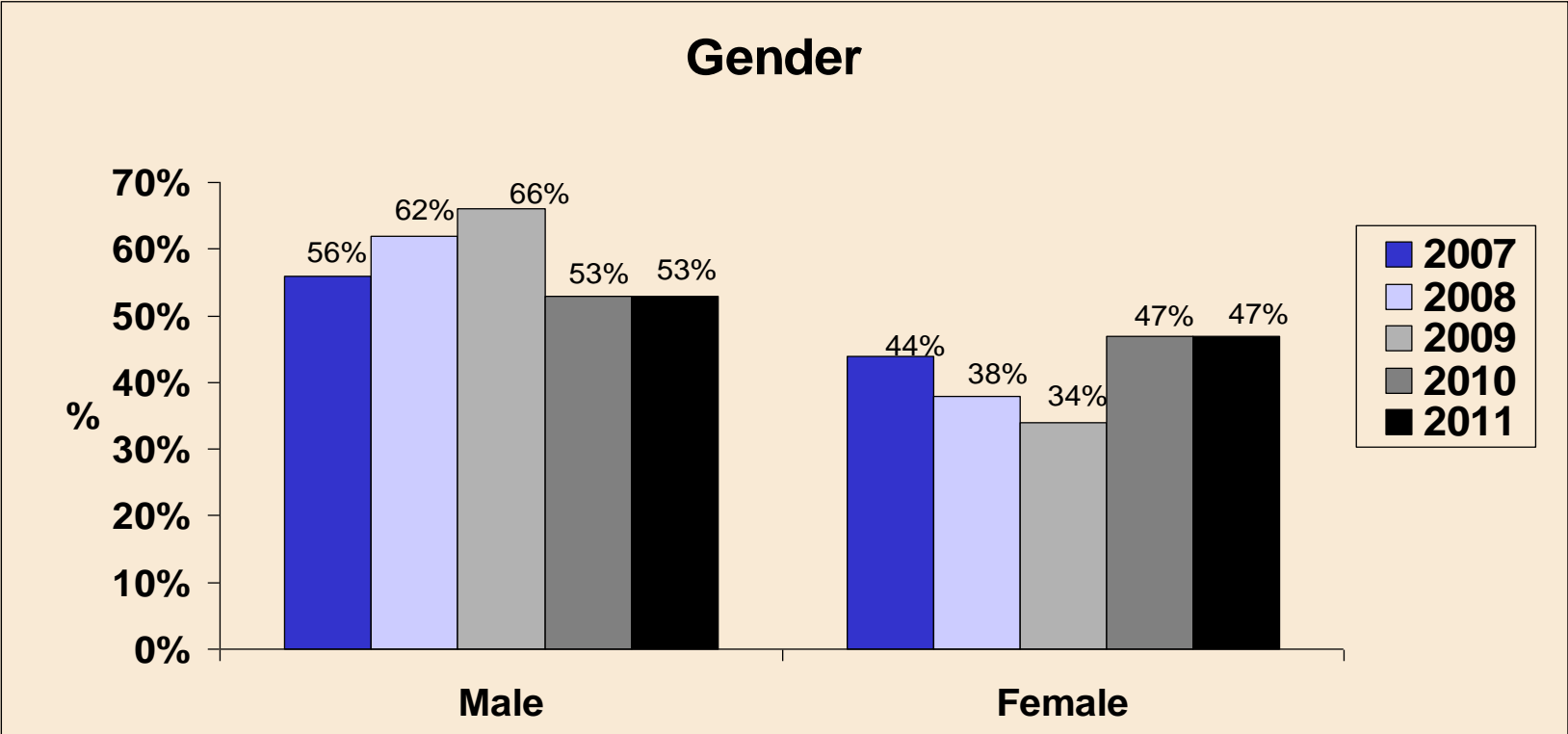
Z Test Analysis:

A Z-test of two independent sample proportions revealed that there was a statistically significant difference in the proportion of KZN visitors when comparing 2010 and 2011. There was also a significant difference in the proportion of Gauteng visitors between 2010 and 2011.

Foreign Visitors' Residence

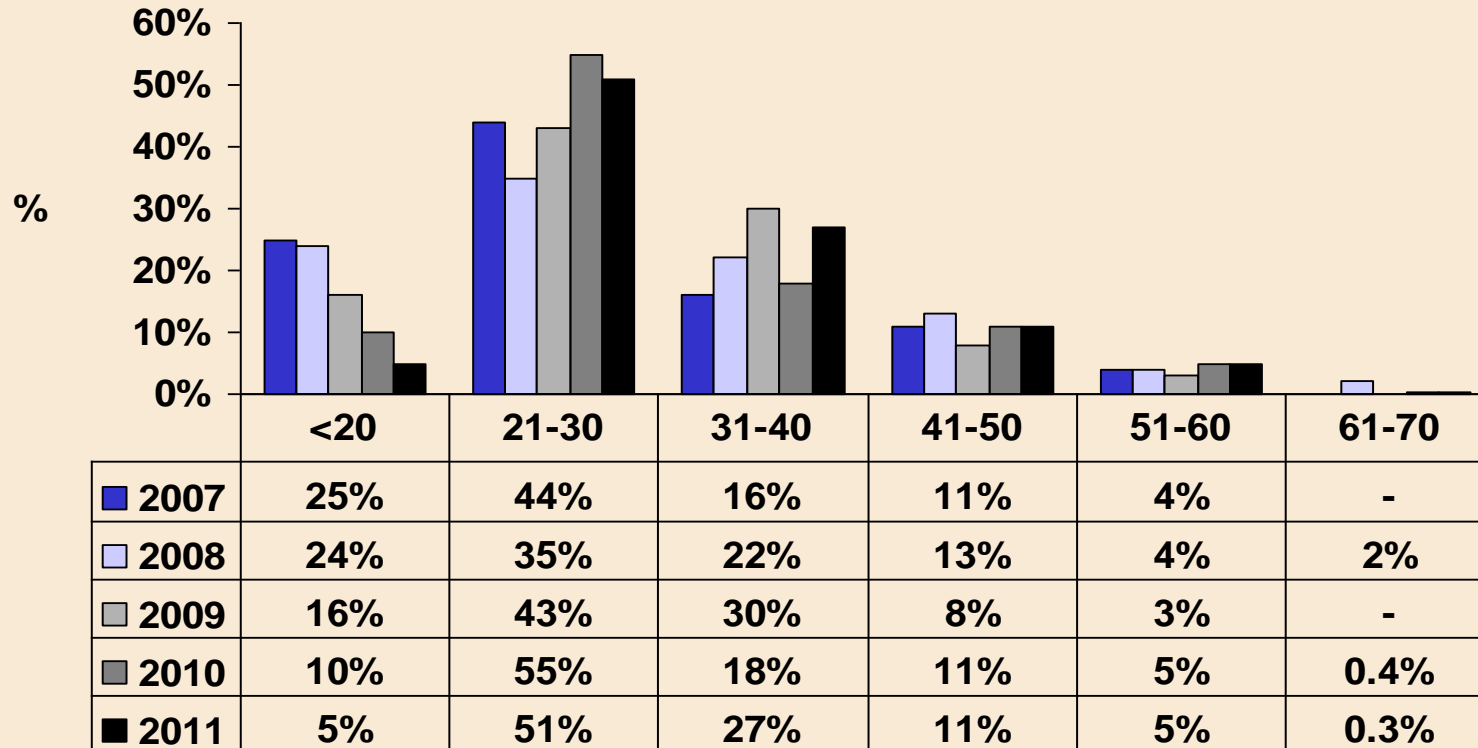
Country of Residence (Respondents)	2006	2007	2008	2009	2010	2011
Australia	-	1	-	-	1	-
Lesotho	-	1	-	-	-	1
Namibia	-	1	-	-	-	-
Swaziland	-	2	-	1	-	-
UK	4	3	1	-	-	-
USA	-	-	1	-	-	-
Zimbabwe	1	-	-	-	-	-
New Zealand	2	-	-	-	-	-
Netherlands	-	-	1	1	-	-
Brazil	-	-	-	1	-	-
Germany	-	-	-	1	3	-
India	-	-	-	1	1	-
Malaysia	-	-	-	1	-	-
Belgium	-	-	-	-	1	-
Ireland	-	-	-	-	1	-
Seychelles	-	-	-	-	1	-
Zambia	-	-	-	-	1	-

Visitors' Gender



Visitors' Age

Age



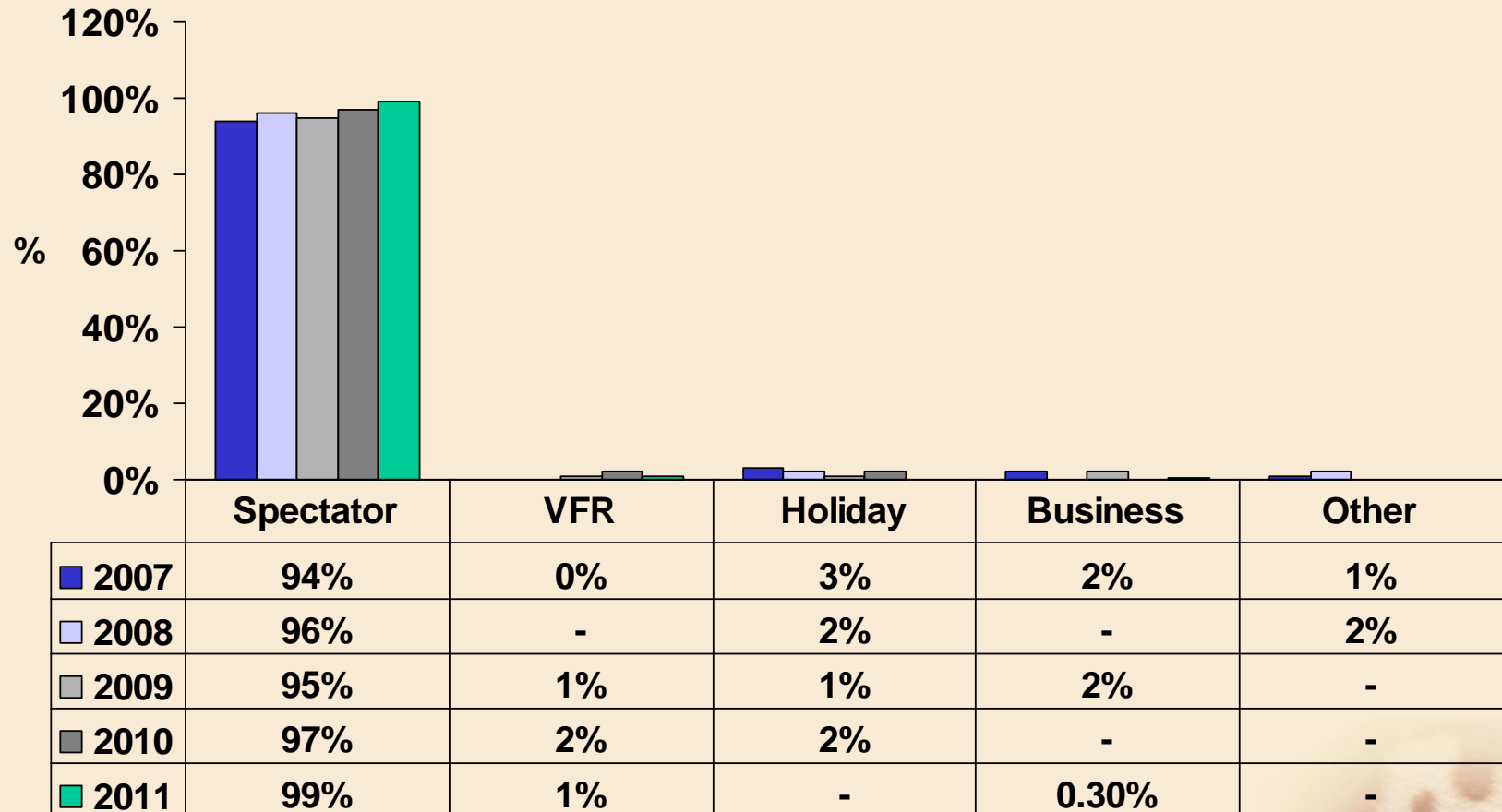
A Z-test indicated no significant difference in the proportion of respondents who fell within the ages of 31-40 when comparing 2010 and 2011.

Average Group Size

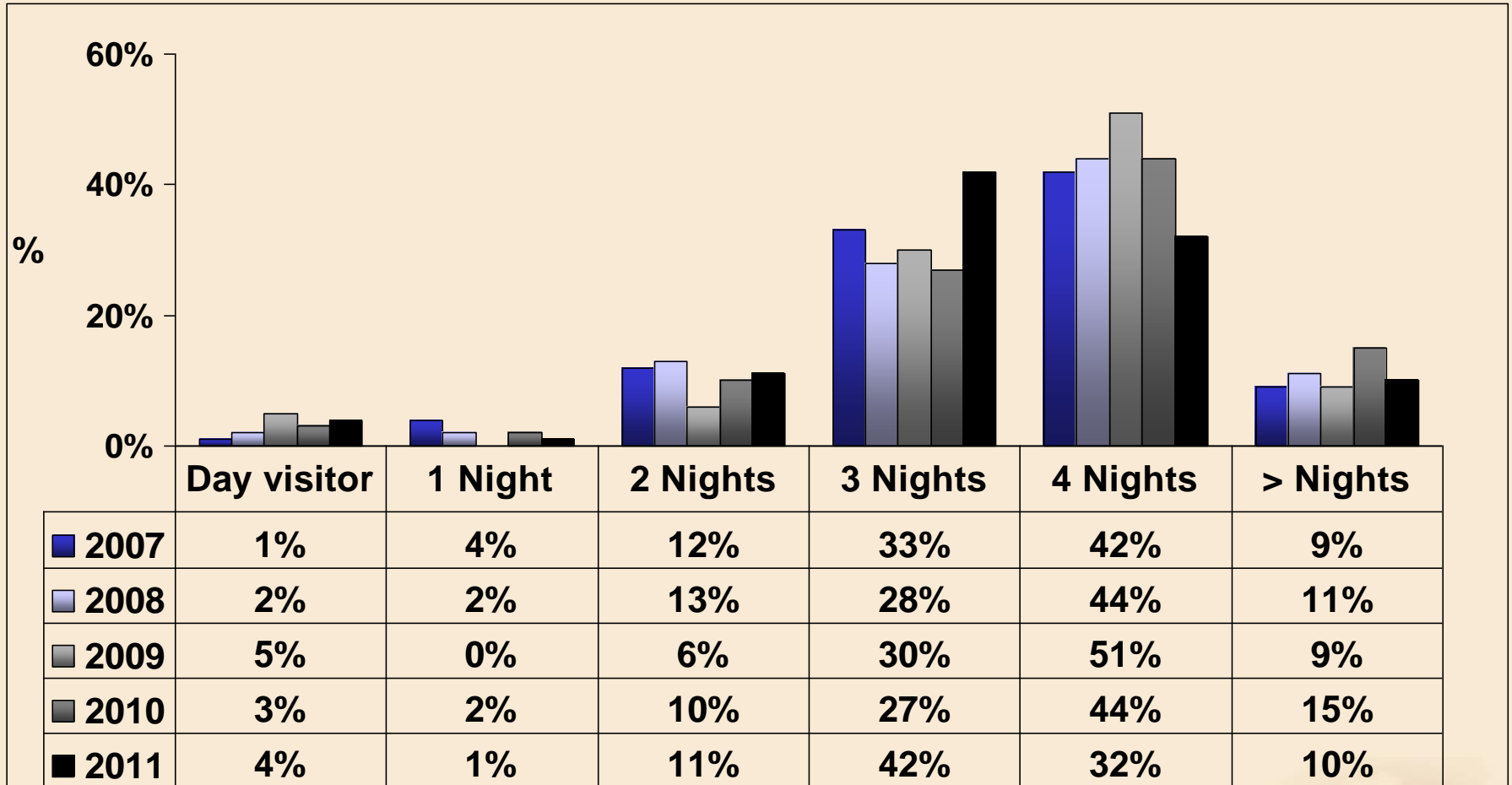
2006	2007	2008	2009	2010	2011
10.6	9.1	6.4	6.1	6.9	4.8



Main reason for visiting area where event took place



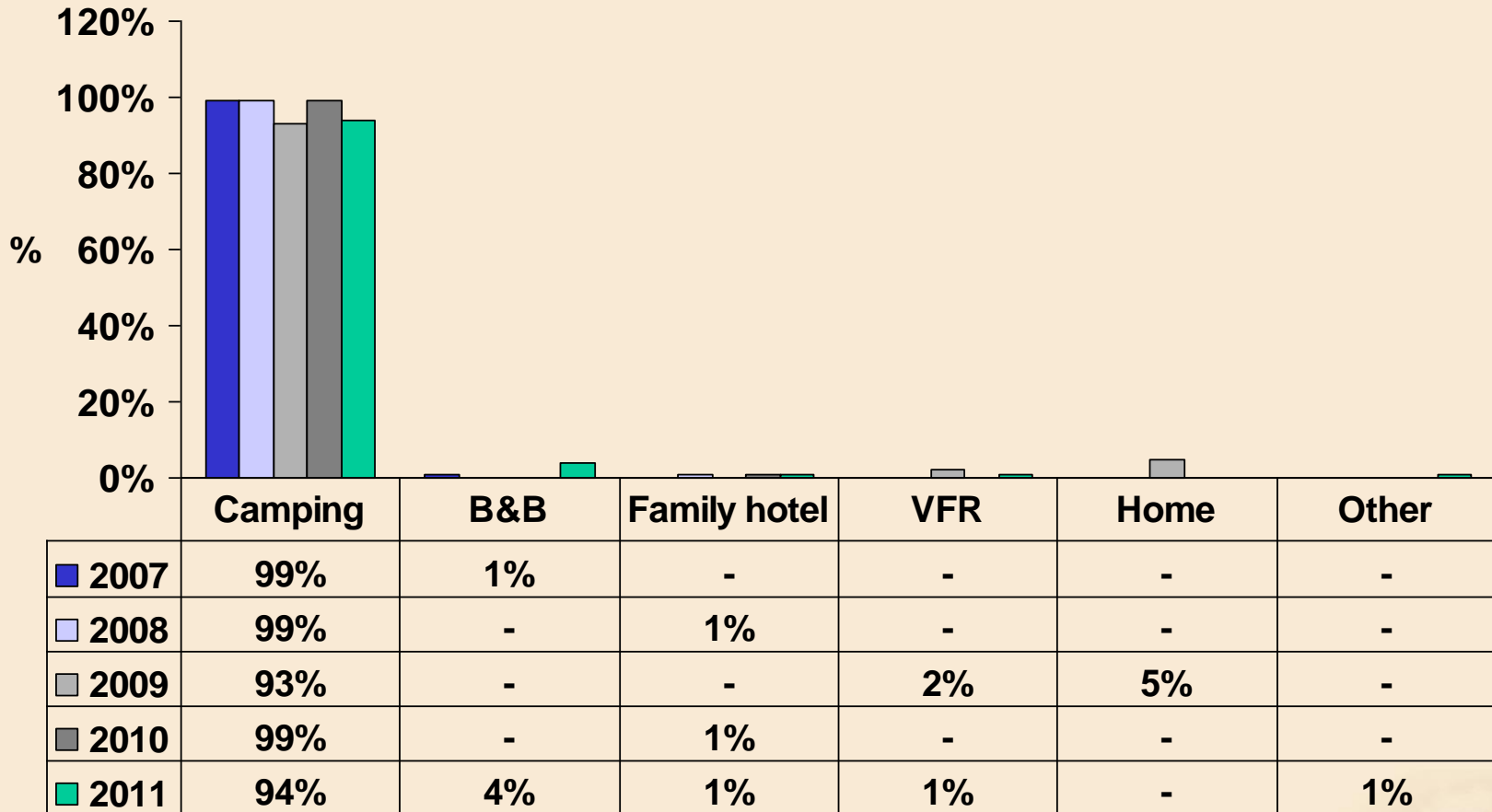
Length of Stay: Average Nights



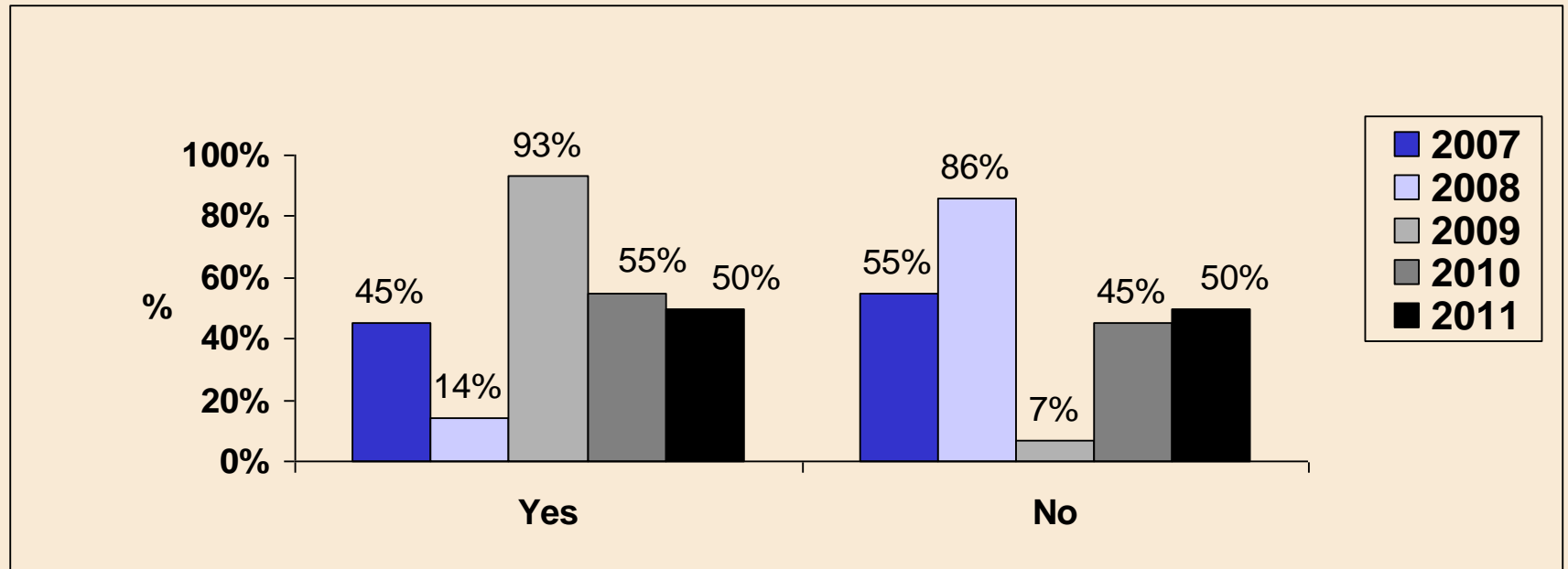
Z-Test Analysis

A Z-test of two independent sample proportions revealed that there was a statistically significant difference in the proportion of respondents whose length of stay were *3 nights and 4 nights* when comparing 2010 and 2011.

Accommodation



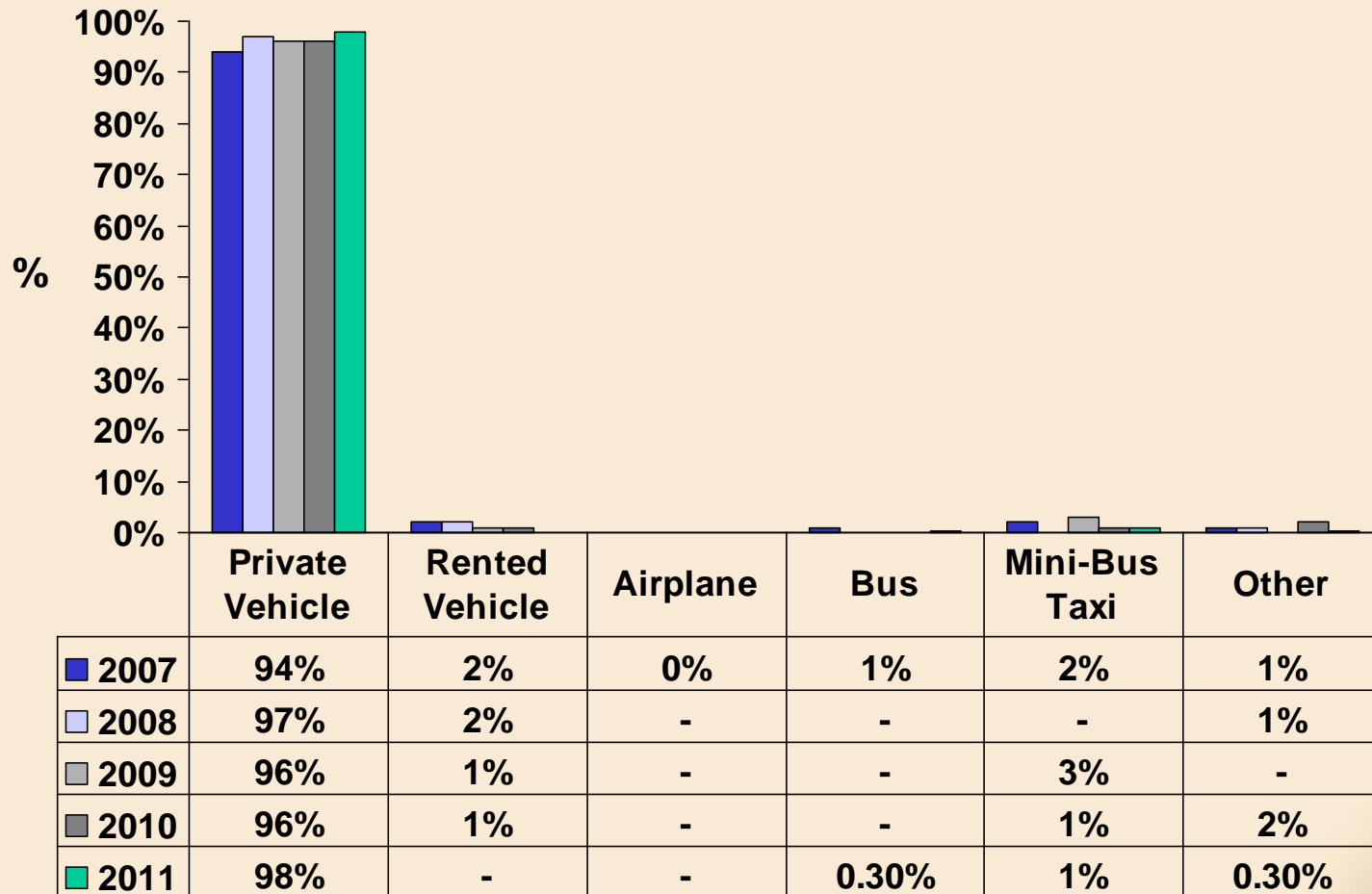
If Splashy Fen was not your primary reason for visiting the event, did you plan your visit to coincide with the event?



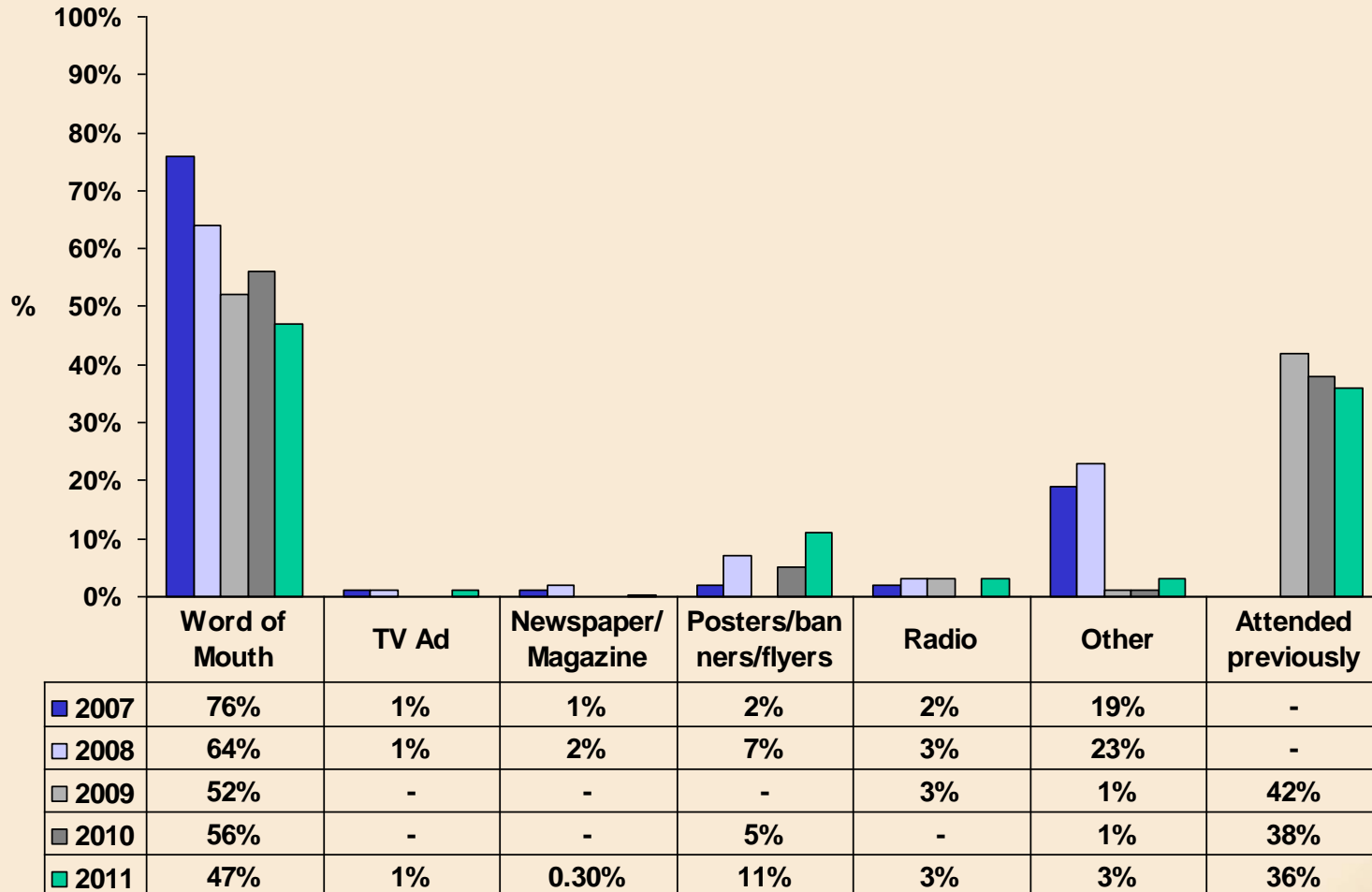
Note: Only 2 respondents indicated that the event was not their primary reason for being in the area. This number is too small to derive any statistical significance .



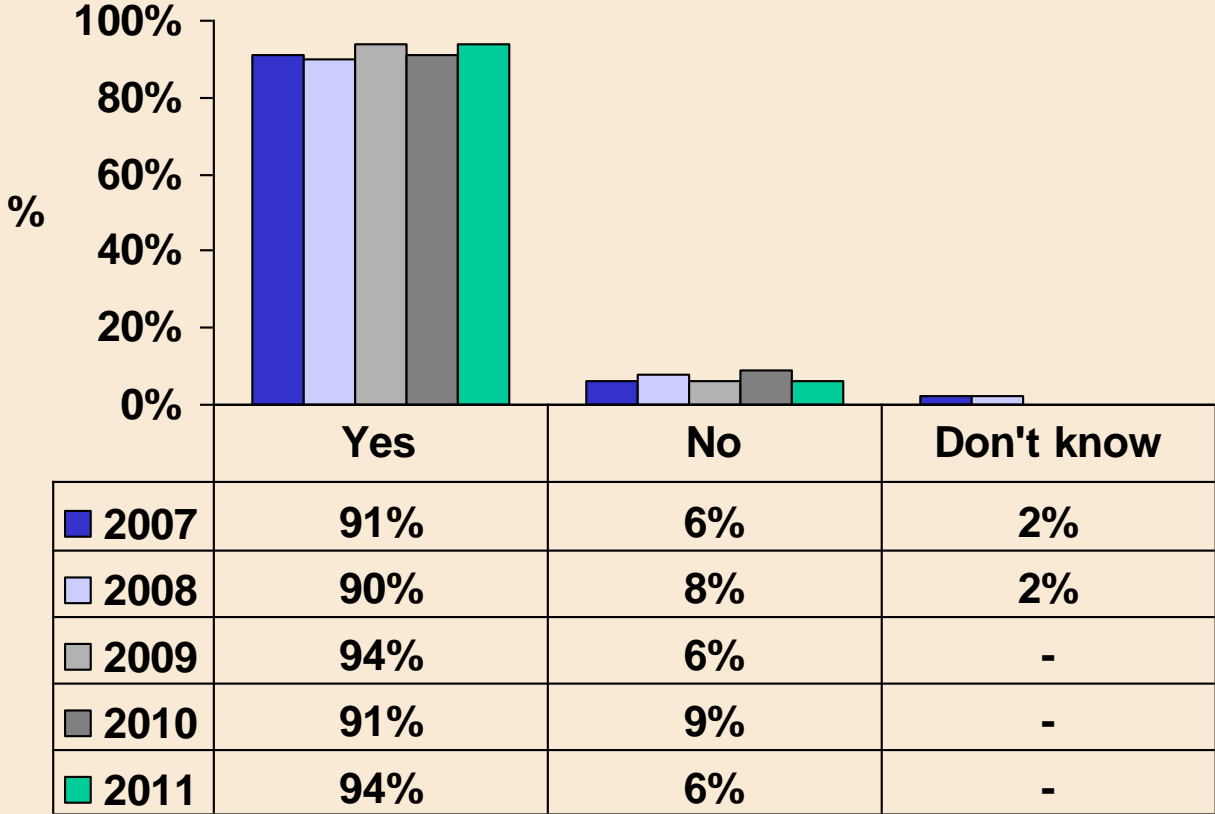
Transport to Event:



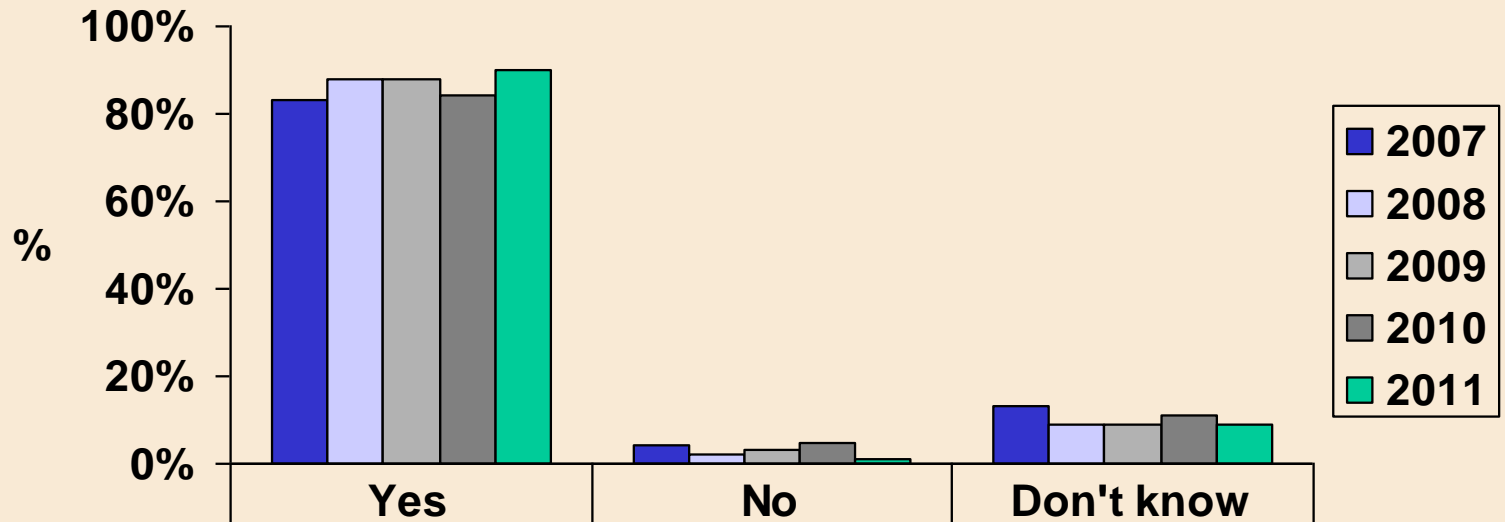
What Influenced you to attend?



Satisfied with information?

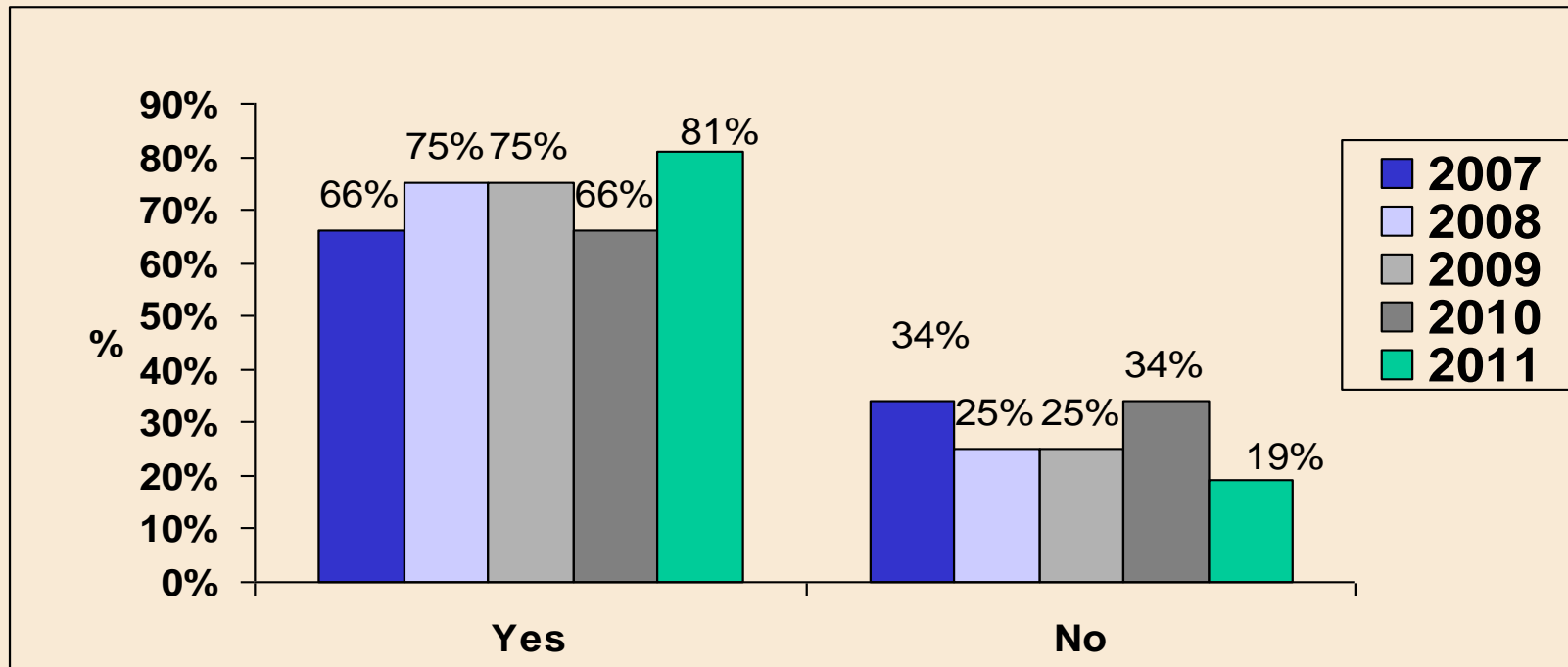


Attend again?



	Yes	No	Don't know
2007	83%	4%	13%
2008	88%	2%	9%
2009	88%	3%	9%
2010	84%	5%	11%
2011	90%	1%	9%

Did you attend previously?



Note: A Z-test of two independent sample proportions indicated that there was a significant difference in the proportion of respondents who attended the event previously when comparing 2010 and 2011.

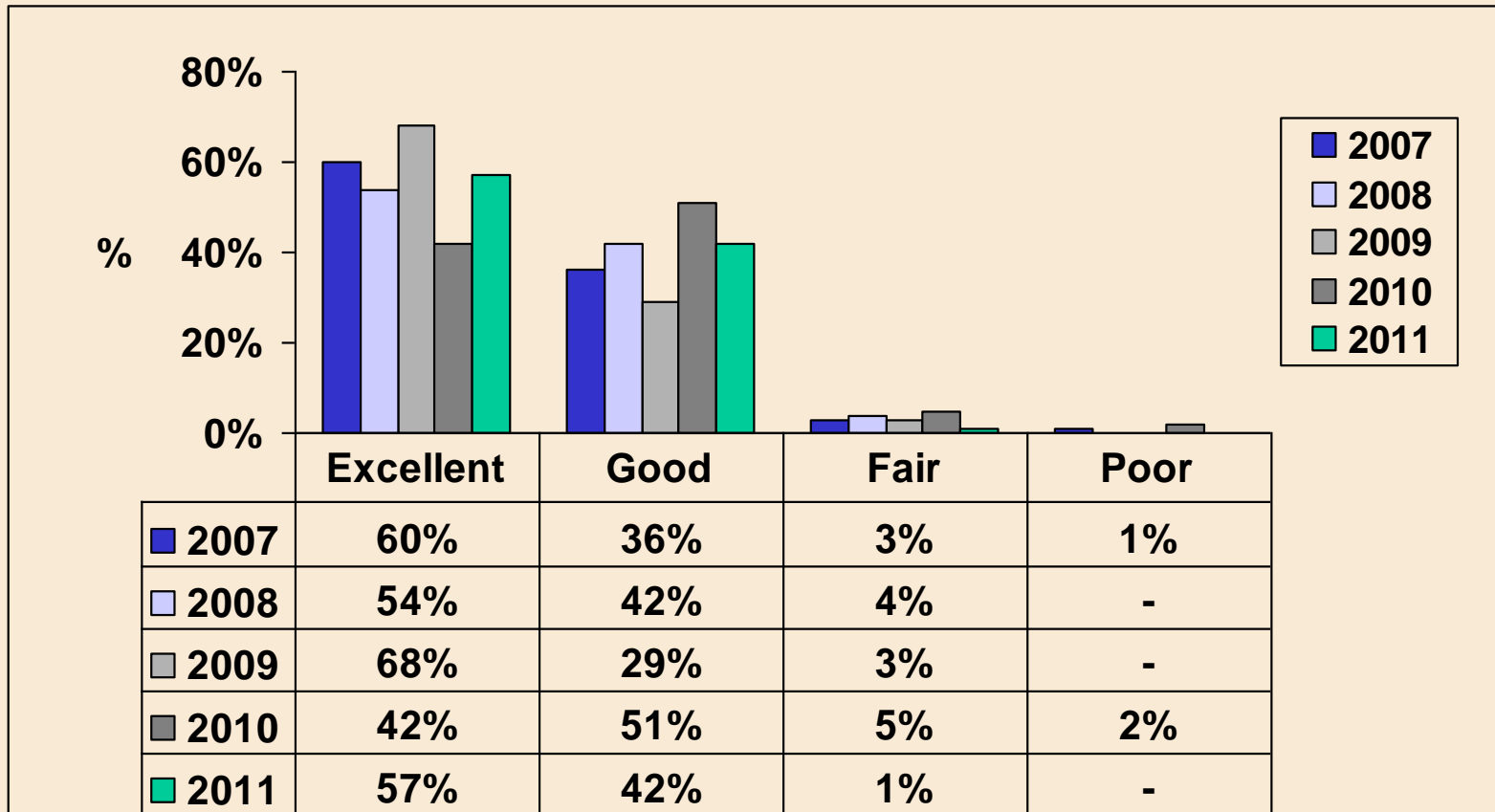


Attendance vs Provinces

Attended Previously?	Eastern Cape	Free State	Gauteng	KZN	Mpumalanga	Western Cape	Total
Yes	1%	-	16%	82%	-	1%	100%
No	4%	-	25%	71%	-	-	100%

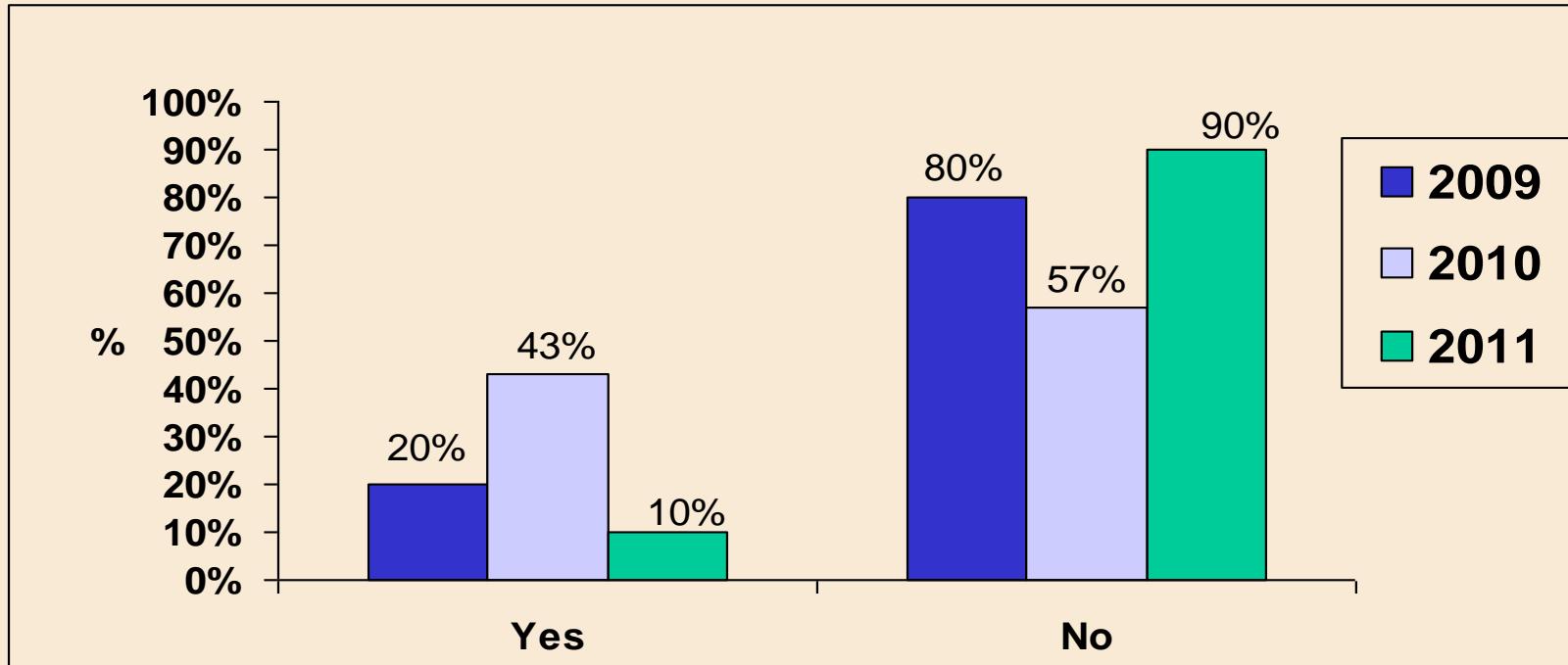


Experience Rating



Note:
 A Z-test of two independent sample proportions revealed that there was a statistically significant difference in the proportion of respondents who had 'excellent' and 'good' experience between 2010 and 2011 events.

Experience Problem?



A Z-test of two independent sample proportions indicated a statistically significant difference in the proportion of respondents who did not experience problems at the event when comparing 2010 and 2011.



Any Problems

Issue	2006	2007	2008	2009	2010	2011
Toilets (too few/poor/too far)	73% (+showers)	36%	22%	31% (few)	72%	-
Toilets - dirty	-	-	-	17%		3%
Shower (too few)	See above	25%	19%	19%		6%
Water (shortage)	-	20%	-	-	5%	3%
Theft/crime	9%	6%	-	8%	1%	32%
Noise	7%	2%	-	-		6%
No provision/selling of ice	-	3%	-	-		-
Bad Road	-	8%	41%	-	2%	24%
More information at event	-	-	8%	-		-
Weather	-	-	2%	-		-
Advertising	-	-	3%	-		-
Signage	11%	-	5%	-		3%
No dustbins	-	-	-	8%	4%	-
Too many drunk people	-	-	-	17%		9%
Showers/bathrooms need improvement					3%	3%
Expensive showers						3%
ATM was out of money	-	-	-	-	-	3%
Lack of food variety	-	-	-	-	-	3%
Expensive tickets	-	-	-	-	-	3%

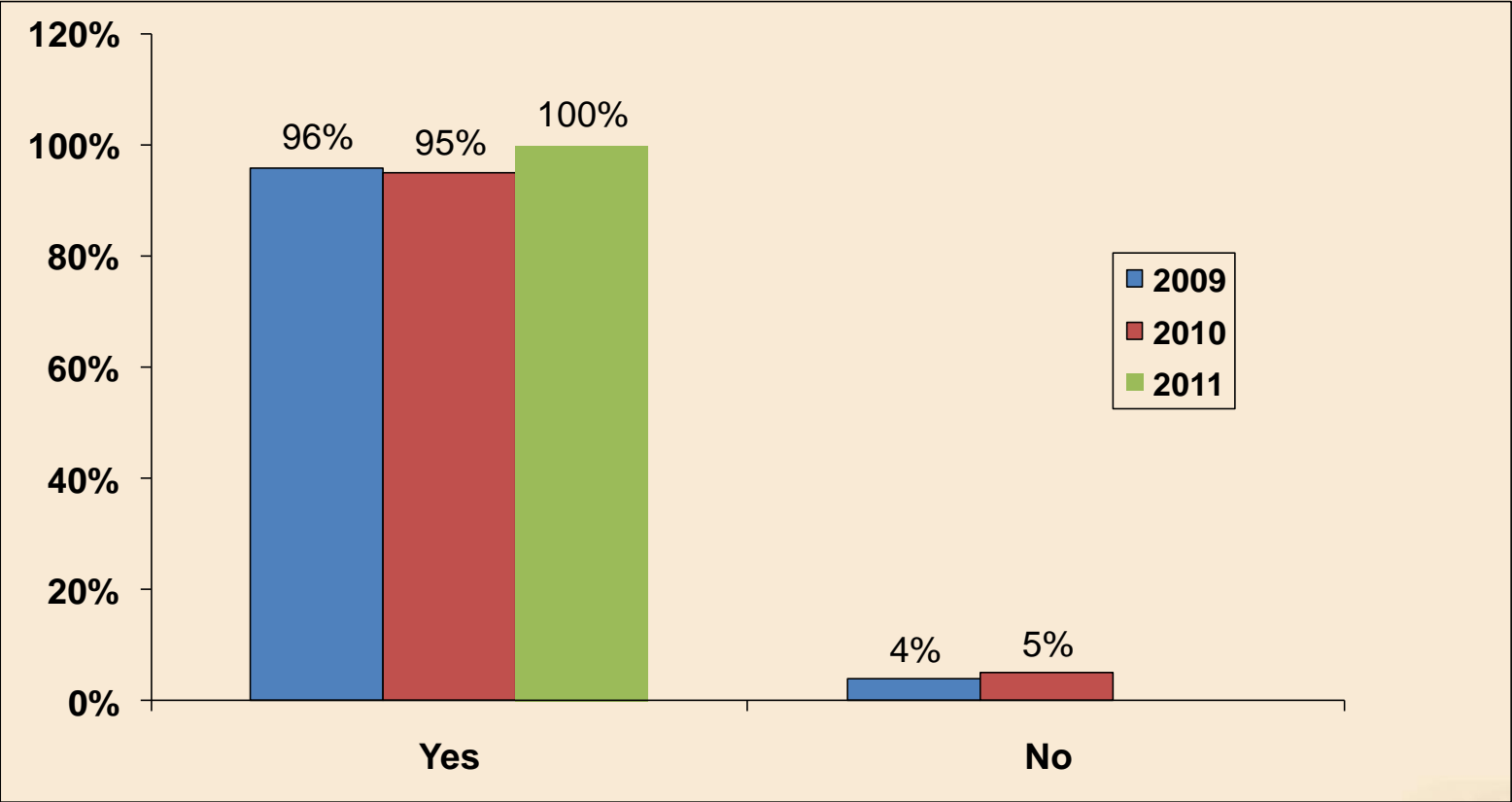
These were problems that were experienced by 10% of respondents as per the previous slide.



Any Problems cont'd

Issue 2010	Count	%
Car boot music loud	3	2
There is racism among the younger generations	2	2
No warm water; showers are irregular	2	2
People are noisy	1	1
Security at night are not seen	1	1
Lack of vegetarian food	1	1
Too many young people	1	1
Lighting	1	1
Parking for day visitors	1	1
Idiot policemen	1	1
No respect for tents; people defecating near tents	1	1
Not enough diverse music	1	1
Breaks between bands are too long	1	1

Recommend the Event to Family & Friends?



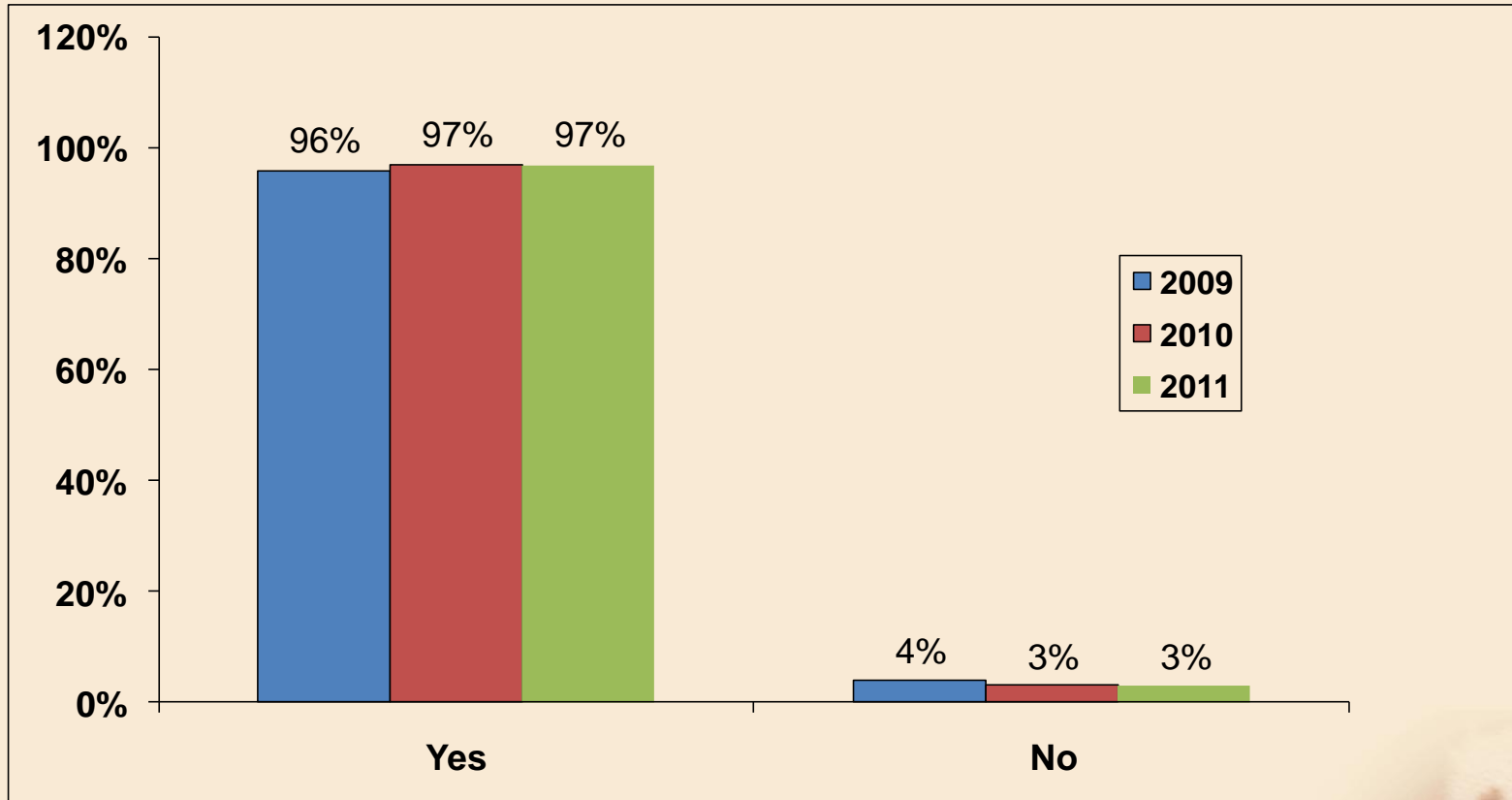
Reasons: Recommendation

The reasons for recommending Splashy Fen were related to the event having the following characteristics as perceived by the respondents:

- Fun event/experience
- Beautiful place/area/scenery
- Fantastic music
- Superb event/fantastic festival
- Good for relaxation and socializing
- Great event for young people
- Great musical experience
- It's well organized
- Nice atmosphere
- Weekend to 'lose control'/free spirit



Recommend KZN as a Tourist Destination to Family & Friends?



Reasons for Recommending KZN

The following were noted as reasons for recommending KZN as a tourist destination:

- Lots of entertainment/to do
- Variety of attractions
- Good weather
- Nature, beautiful scenery
- Friendly people
- Good facilities
- Great beaches
- Great casinos
- Good place to relax

The following issues were noted as reasons for not recommending KZN as a tourist destination:

- There is not much to do/boring
- KZN does not have what tourists want
- It is not clean/safe
- The ocean is the only draw card



Characteristics or Images of KZN

- The beach/coastline
- Good weather/hot weather/sunshine
- Zulu culture/people/warriors
- Heritage/culture
- Wildlife
- King Shaka Zulu
- Durban beachfront
- East Coast Radio
- Friendly people
- Green hills
- Moses Mabhida
- PMB City Hall
- Splashy Fen Festival
- uShaka Marine World
- Mountains/Drakensberg
- Valley of 1000 Hills
- Lakes/rivers
- Surfing
- Sharks and Rhinos
- Indian culture
- Long summer days
- Sugarcane fields



Atmosphere of KZN

- Relaxed/holiday mood
- Calm/cool/peaceful
- Cheerful
- Festive/holiday
- Friendly/welcoming
- Fun/happy/joyful
- Party/vibe
- High energy/vibrant
- Laid back

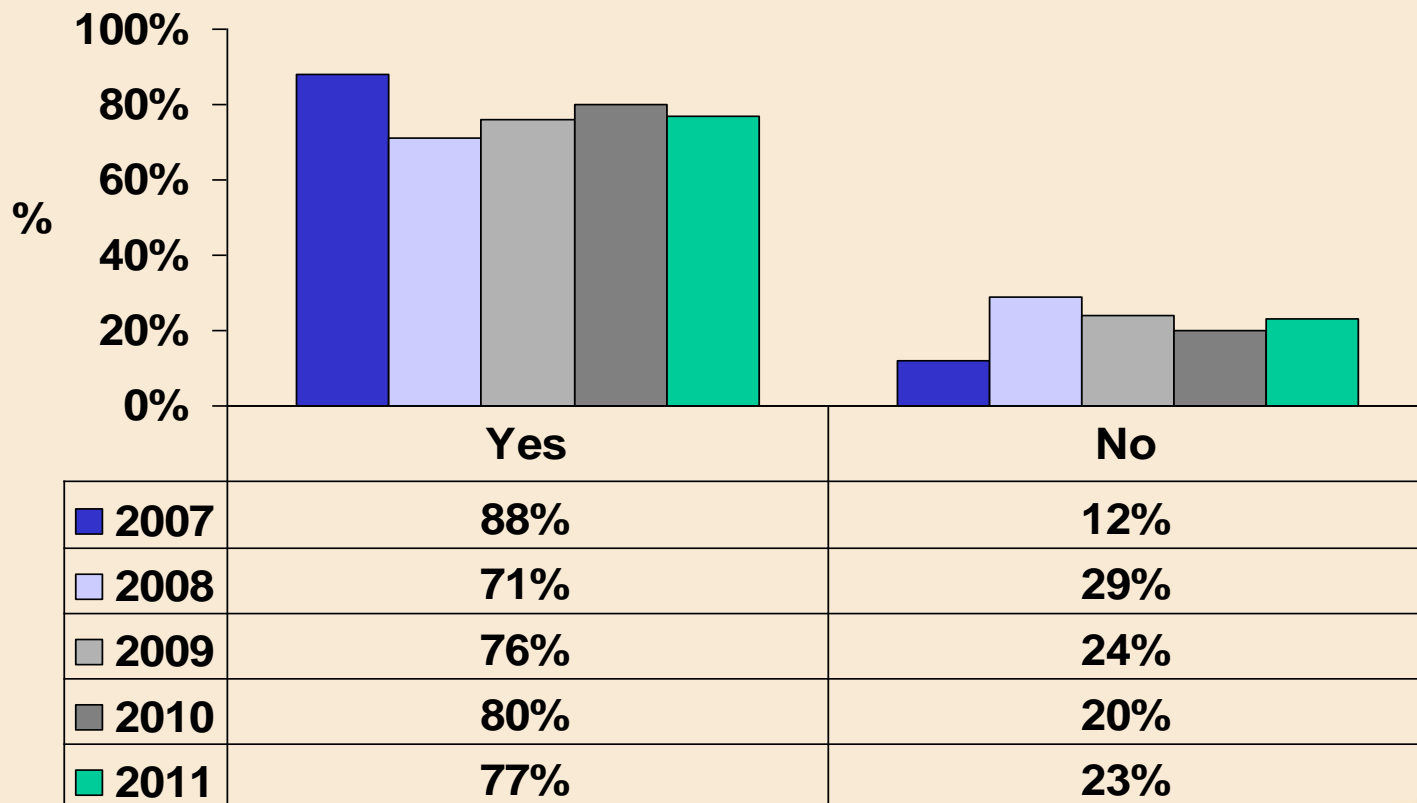


Unique Attractions

- Aliwal Shoal
- Battlefields
- The Beach
- Drakensberg
- Hluhluwe Game Reserve
- St Lucia
- Suncoast
- Crocodile park
- Midlands/Midlands Meander
- Game reserves
- Moses Mabhida Stadium
- Valley of 1000 hills
- Howick falls
- Nagle dam
- uShaka Marine World
- Oribi Gorge
- Rickshaws
- Sani Pass
- Phezulu Safari Park
- Victoria Street Market
- Zulu Culture



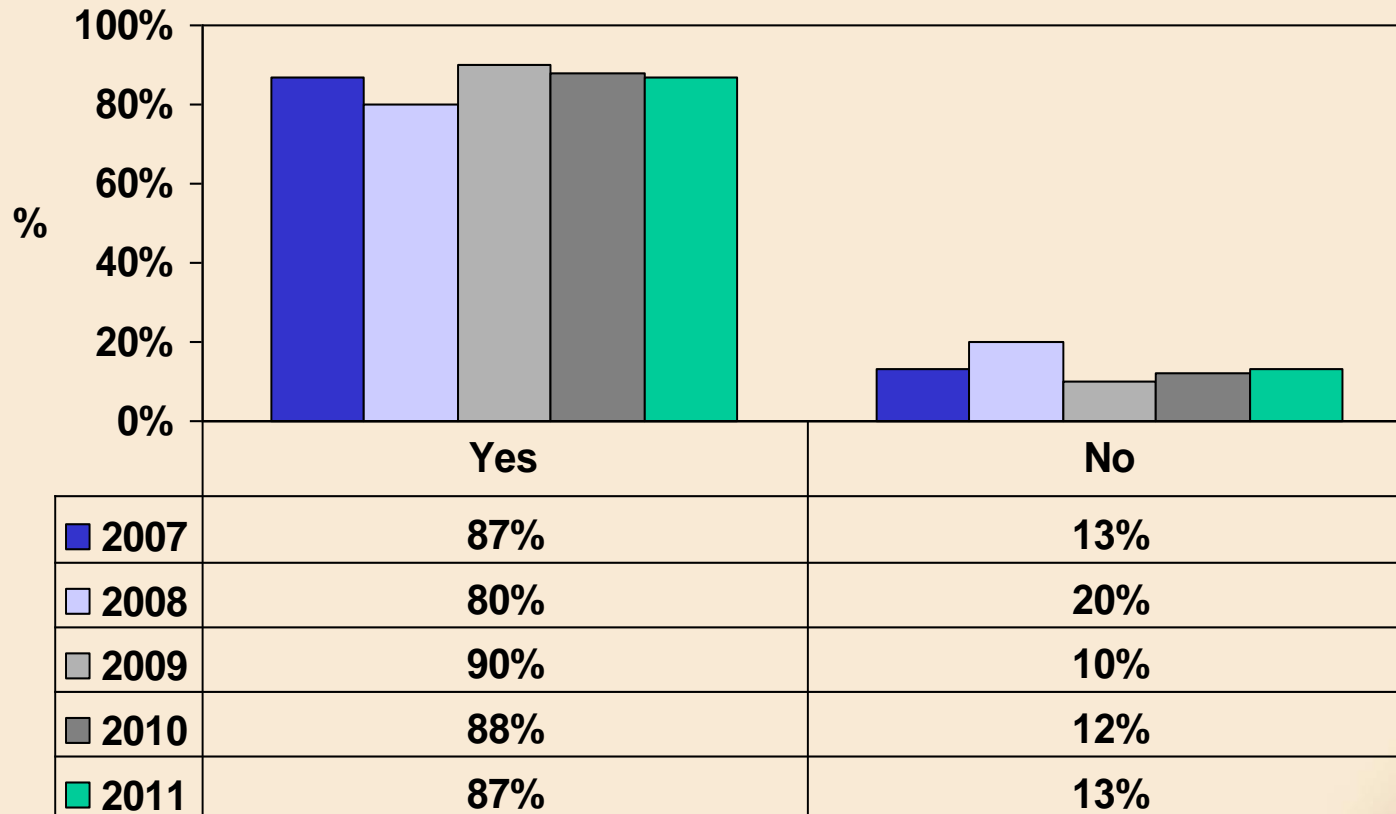
Familiar with Zulu Kingdom slogan?



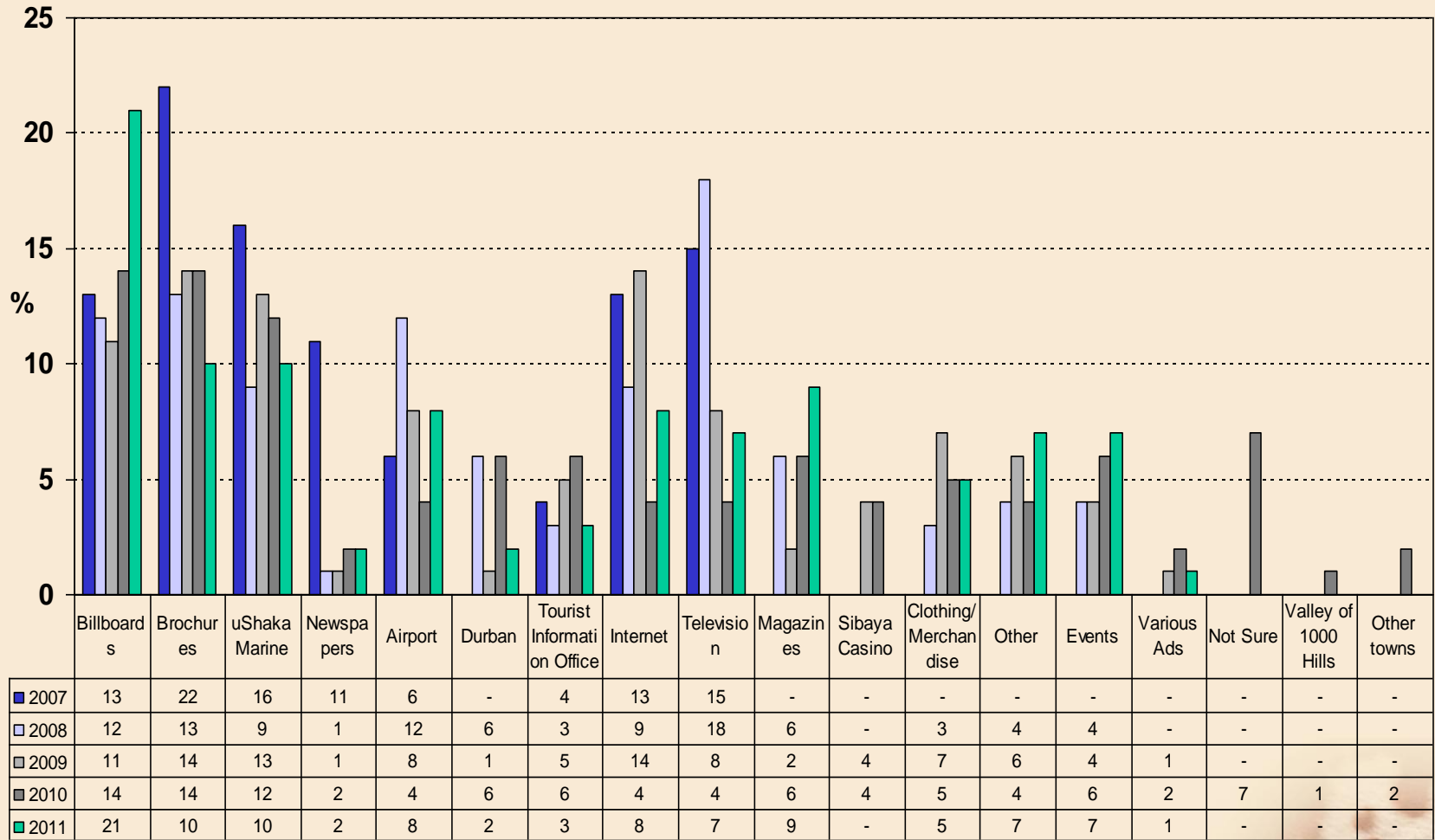
Associations - Zulu Kingdom slogan:

	2006	2007	2008	2009	2010	2011
KZN/Promotion of KZN	30%	20%	17%	13%	6%	19%
Tourism/ Holidays	6%	-	15%	36%	14%	33%
Zulu history/heritage/culture/monarchy/Shaka	51%	24%	31%	9%	41%	32%
Culture	1%	14%	10%	14%		5%
Tourism/KZN Tourism	6%	34%	8%	3%	1%	1%
Durban	-	1%	1%	4%	1%	1%
Drakensberg/Mountains	-	5%	-	-	2%	-
Wilderness/Wildlife	-	2%	-	-	3%	-
Entertainment	6%	-	-	-		-
Africa	-	-	5%	3%	8%	4%
Other	-	-	19%	18%	3%	5%
Casino	-	-	-	-	3%	-
Don't know/Not sure	-	-	-	-	12%	-
Ushaka	-	-	-	-	2%	-
Warrior/Spear/Shield	-	-	-	-	4%	-
Politics	-	-	-	-	-	2%

Noted Zulu Kingdom logo?



Where Zulu Kingdom logo noted?



Total mean individual spend?

	2006	2007	2008	2009	2010	2011
Mean Spend	R1 357	R1 525	R1 372	R1 740	R1 860	R2 174
Low margin of error of mean at 95% confidence level	R 1 240	R 1 379	R 1 365	R1 626	R1 750	R2 029
High margin of error of mean at 95% confidence level	R1 474	R1 671	R1 380	R1 853	R1 971	R2 319

Total spend breakdown

Item	Spend per Person (2007)	Spend per Person (2008)	Spend per Person (2009)	Spend per Person (2010)	Spend per Person (2011)
Transport	R396* R350** R441***	R479* R476** R482***	R553* R509** R597***	R476* R421** R532***	R618* R561** R675***
Food & beverages	R664* R568** R761***	R588* R510** R666**	R631* R579** R683***	R924* R848** R1000***	R793* R736** R850***
Entertainment	R489* R386** R593***	R337* R296** R377**	R395* R255** R534***	R556* R496** R705***	R420* R369** R471***
Souvenirs & other	R281* R244** R318***	R100* R174** R226***	R249* R213** R284***	R325* R266** R385***	R250* R224** R275***
****Tickets (accommodation was included in ticket price)	R503* R428** R579***	R349* R313** R385***	R441* R431** R452***	R414* R413** R426***	R472* R461** R483***

* No margin of error of mean

**Low estimate of margin of error of mean at 95% confidence level

***High estimate of margin of error of mean at 95% confidence level

****Accommodation was included in the ticket price.

Estimated economic impact (2008, 2009, 2010 and 2011)

Year	Spectators	Estimated Direct Spend	Estimated direct tourism spend taking std error into account		Direct Spend with a multiplier of 1.42	Estimated total spend with a multiplier of 1.42, taking std error into account	
			*Low Estimate	**High Estimate		*Low Estimate	**High Estimate
2008	6 000	R11.71mn	R10.61mn	R12.81mn	R16.63mn	R15mn	R18.20mn
2009	5838*	R10.2mn	R9.6mn	R10.8mn	R14.6mn	R13.7mn	R15.4mn
2010	6 480*	R12.12mn	R11.37mn	R12.84mn	R17.22mn	R16.14mn	R18.24mn
2011	6 937*	R15.08mn	R14.07mn	R16.08mn	R21.4mn	R19.9mn	R22.8mn

Note:

*Low estimate of margin of error of mean at 95% confidence level

**High estimate of margin of error of mean at 95% confidence level

Calculations were based on the number of paying attendees excluding artists, crew, suppliers, traders, sponsors & media. Calculations for 2009, 2010 and 2011 have been re-adjusted to only include visitors whose primary reason for being in the area was the event.



Main Findings/Conclusions

- The majority of respondents (97%) indicated they would recommend KZN as a tourist destination to family and friends as they were of the view the province has the following elements:
 - Lots of entertainment
 - Variety of attractions
 - Good weather
 - Friendly people
 - Good facilities
 - Good beaches
 - Great casinos
 - Good place to relax
- There was a significant increase in the proportion of Gauteng visitors when comparing 2010 and 2011 events. Continuous research that is undertaken during the event suggests that the Splashy Fen event's visitors are largely from within KZN followed by those from Gauteng.
- The majority of respondents fell within the ages of 21-30 and 31-40. These seem to be the dominant age groups of Splashy Fan spectators when analyzing the results of previous years. These results thus provide an indication that the festival appeals mainly to such age groups. This may possibly be linked to the genre of music and the artists that perform at the festival. The dominant age group of spectators should assist in providing the type of media that can be used to attract more people.

Main Findings/Conclusions (cont'd)

- As from 2007, there seemed to be a continuous decline of spectators in the age group of 20 years and below. A high level of alcohol intake that is experienced at the event may be the cause of such a decline as parents become aware of the situation, or a change in the taste of music.
- As per the trend, the large proportion of respondents during 2011 were in the area specifically for attending the festival as shown by 99% of respondents who indicated had visited the area specifically for the event. This, together with the results that show that 81% of respondents had attended the event previously suggests the degree of the popularity of the event as well as satisfaction levels that they continuously experience.
- There was a significant increase in the proportion of respondents whose average length of stay was 3 nights when comparing 2010 and 2011 suggesting they stayed for a shorter period. Overall, previous research shows that people stay mainly for an average of 3 and 4 nights for the event which is positive as the event usually takes place over a four-day period.
- The main form of accommodation continued to be camping at the farm suggesting that very few people opted to stay at establishments around the area. This suggests that not all accommodation establishments around the area benefited as a result of the event. This also gives an indication that respondents are happy/satisfied with the camping experience.

Main Findings/Conclusions (cont'd)

- As much as paid for advertising was undertaken to remind people about the event, word-of-mouth and previous attendance continued to be the main factors which influenced respondents to attend the event. Some 47% and 36% of respondents were influenced through word-of-mouth and previous attendance, respectively. It is therefore important to ensure that there is continuous improvement in arranging the event so that people continue to spread positive news about it.
- 94% of respondents were satisfied with information provided regarding the event. This was information that was provided in various media such as radio, posters/flyers, newspapers/magazines as well as word-of-mouth as the main influencing factor. This possibly means they (respondents) knew what the event was about, artists that would perform and what to bring, etc. The latter would have been influenced also by the existing knowledge of the event through previous attendance as mentioned previously.
- Respondents continued to indicate their intention of attending again as shown by 90% of them that said they would attend the event in future while 9% did not know. Of those that did not know, 18% of them were first time attendees. As alluded to previously, this suggests that the majority of people were positive about the event and this could be attributed to number of things such as the music, the type of artists that perform as well as the camping experience.

Main Findings/Conclusions (cont'd)

- In addition to the above points, a large proportion of respondents had a positive experience at the event as shown by 57% and 27% who had 'excellent' and 'good' experience, respectively. This talks to the degree of satisfaction levels experienced at the event. This also suggests a positive relationship between positive experience and intentions of visiting again.
- The event continued to attract new people as shown by 19% of respondents who were attending the event for the first time. 4% of those were from the Eastern Cape, 25% from Gauteng and 71% were from KZN.
- Only 10% of respondents experienced problems which was a significant decrease from the 2010 event. This suggests that there have been concerted efforts in addressing problems experienced before. The main problems that were cited in 2011 were:
 - Theft/crime
 - Bad road
 - Drunk people
- It was positive that all respondents said they would recommend the event to family and friends as they were of the view it had the following attributes:
 - It was a fun event/experience
 - Fantastic music
 - Good for relaxation and socializing
 - Well organised event

Main Findings/Conclusions (cont'd)

- The majority of respondents (87%) had noted the Zulu Kingdom logo while 77% were familiar with the Zulu Kingdom slogan which they mainly associated with :
 - Tourism/holidays (33%)
 - Zulu history/heritage/culture/monarch/King Shaka (33%)
 - KZN/promotion of KZN (19%)
- The above suggests that even though the association of the slogan with Zulu history/culture was still evident, there seemed to be an increase in associating the slogan either with tourism/holidays and promotion of KZN. This could be attributed to a number of things such as marketing that is undertaken by TKZN. This may suggest that such marketing is having the positive impact. It will be interesting to note and track the changes with the new logo.



Positive Findings for KZN

- 90% would attend this event again
- 99% rated the event as good or excellent
- 100% would recommend the event to friends and relatives
- 97% would recommend KZN as a tourist destination to family and friends
- 77% were familiar with the slogan
- 87% were familiar with the logo



Recommendations

The issues which respondents raised were not new - they have been raised in previous years. Recommendations were made on these issues in previous research. The main issue which was raised in 2011 was theft/crime. New issues that were raised in the 2011 event were related to lack of funds in the ATM and lack of food variety. In this regard, it is recommended that the event organizers consider the following:

1. Encourage festival-goers not to leave their tents unattended as this was observed by the researcher on numerous occasions. This information can be published in the festival programme/publication that is distributed to spectators when entering the farm.
2. Employ more security personnel to walk around during the night.
3. Ensure with the relevant Bank that there are sufficient funds in the ATM machine.
4. Looking at increasing variety of food stalls.