

Reed Dance 2010 Impact Assessment: Top Line Summary Report

Zama Dlamini
Karen Kohler
Tourism KwaZulu-Natal
November 2010

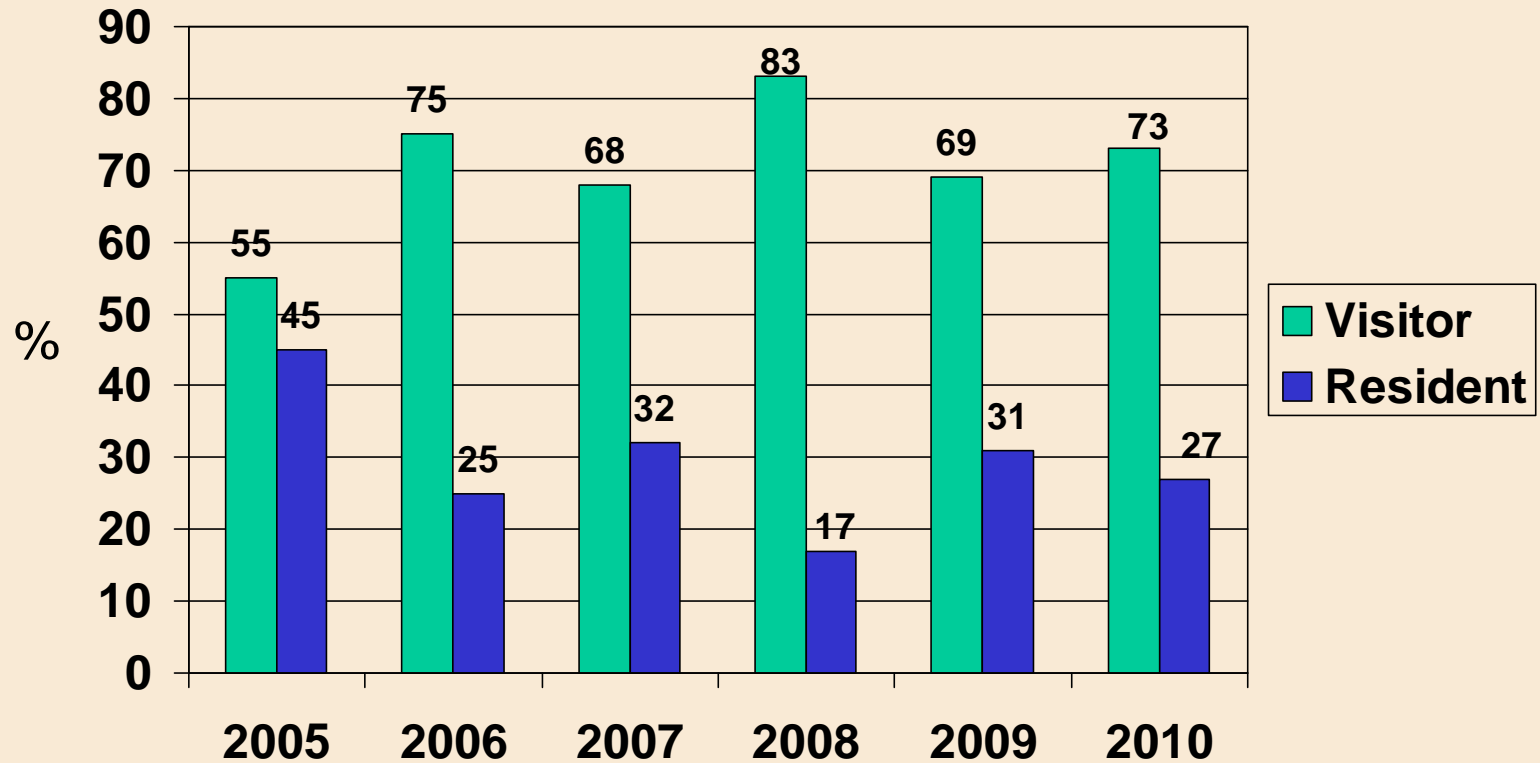


Methodology

- 197 face-to-face interviews
- Respondents randomly selected
- Structured questionnaire
- Survey conducted on main day of event which took place on Saturday, 11th September 2010.

Please note that this survey is only an impact assessment of the main day of this event and its results are thus a conservative estimate of the total impact.

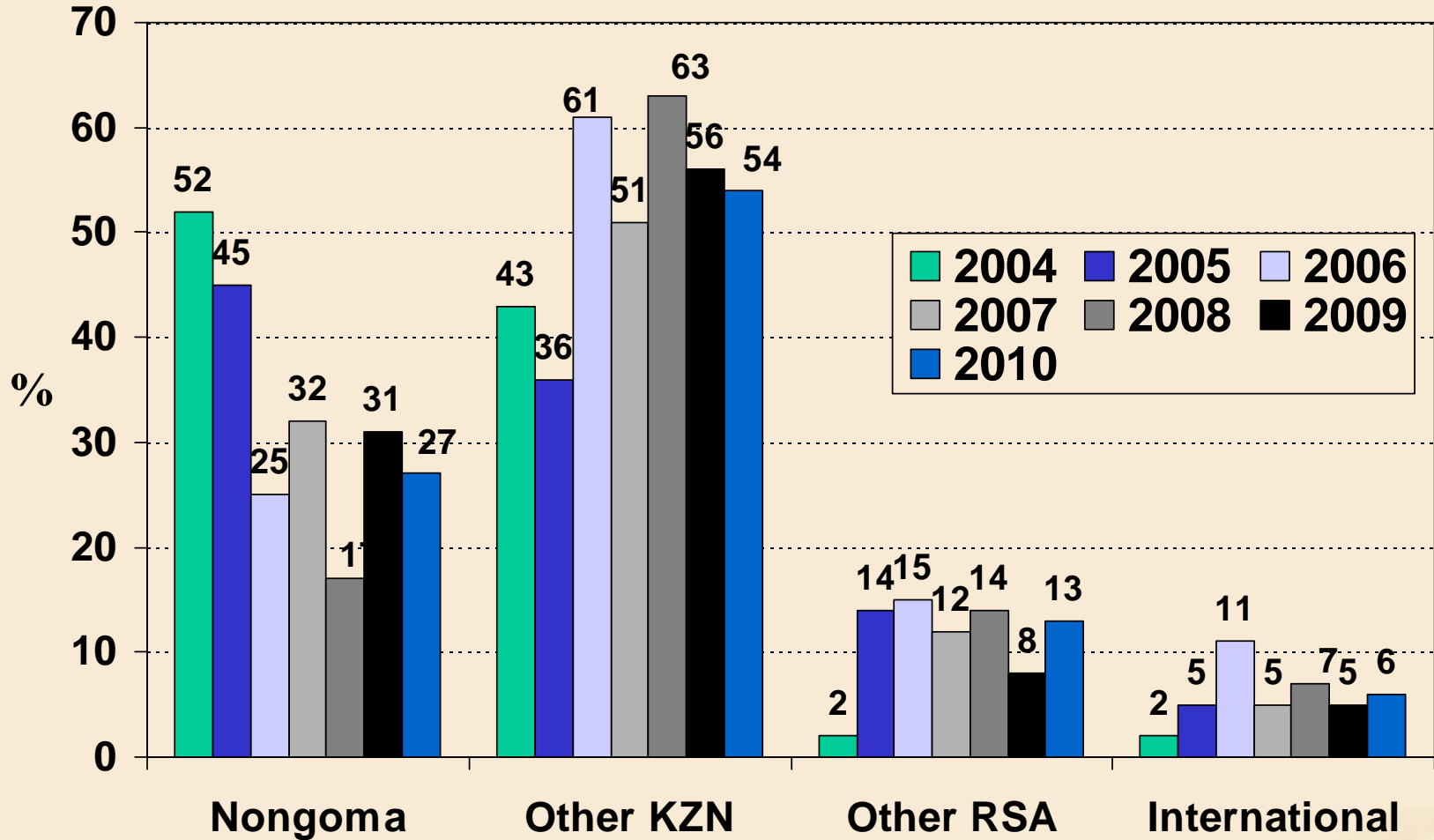
Visitor / Resident



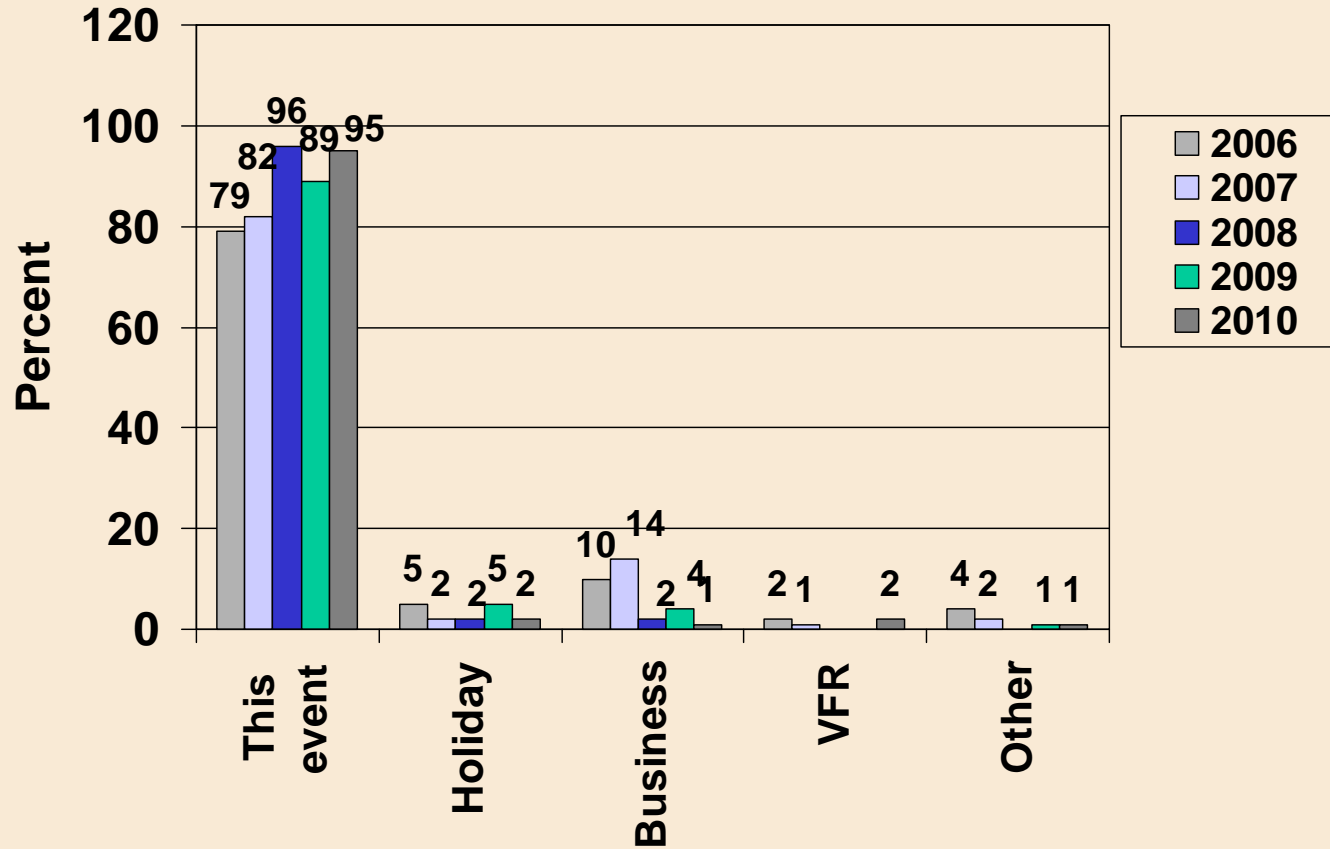
A one tailed Z-test of two independent sample proportions did not indicate a significant increase in the proportion of respondents who were visitors to the event in 2010.



Nature of Spectators



Primary reason for visiting the area

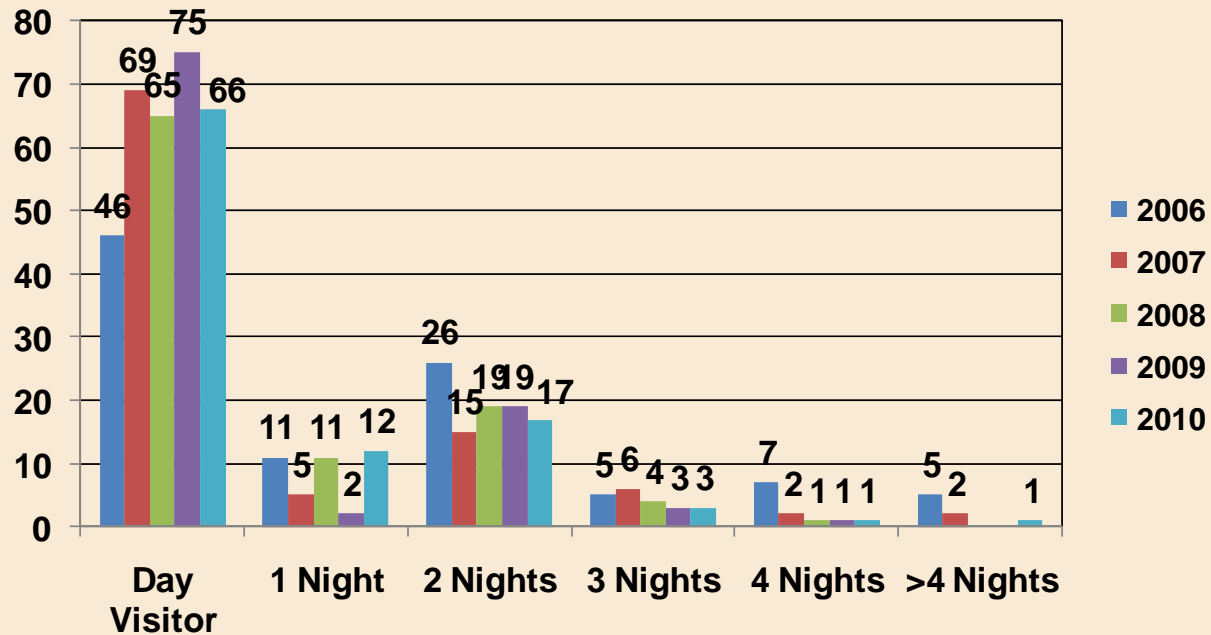


A one tailed Z-test of two independent sample proportions indicated a significant increase in the proportion of respondents whose main purpose for visiting the area in 2010 was 'this event'.



Length of stay

Respondents were predominantly day visitors or stayed for 2 nights.



Nature of spend

Average Spend	2008 (R)	2009 (R)	2010 (R)
Accommodation	1 208	1 221	1 758
Transport	622	388	326
Food & Beverage	262	255	193
Entertainment	470	388	691
Souvenirs	139	221	439



Estimated Economic Impact

2010

Visitors (Non-resident respondents*)

Estimated N = 3 285 (4500 73%)

Mean: R1 074

Std Deviation: R1 390

Count: 133

Mode: R300

Median: R550

Std error at 95% level of confidence spend between R835 and R1 312

Estimated direct spend not taking Std error into account: R3,526,448

Estimated direct spend taking Std error of mean into account: At least R2,743,361 and as much as R4,309,534

Resident respondents*

Estimated N = 1 215 (4500 X 27%)

Mean: R163

Std Deviation: R194

Count: 48

Mode: R20

Median: R105

Std error at 95% level of confidence spend between R107 and R219

Estimated direct spend not taking Std error into account: R198,045

Estimated direct spend taking Std error of mean into account: At least R 129,743 and as much as R266,347

Estimated Direct impact: At least **R2,873,104** and as much as **R4,575,881**

Estimated Total Impact with a multiplier of 1.42: At least **R4,079,807** and as much as **R6,497,751**

*Excludes the maidens



Estimated Economic Impact (cont'd)

		2008	2009	2010
Non-Residents	N	2 490	3 105	3 285
	Mean Spend	R1 452	R1 143	R1 075
	Estimated Spend*	R3 616 476	R3 549 670	R3 526 448
	Low estimated spend**	R2 620 040	R2 896 379	R2 743 361
	High estimated spend**	R4 612 912	R4 203 020	R4 309 534
Residents	N	510	1395	1 215
	Mean Spend	R148	R446	R194
	Estimated spend*	R75 429	R622 852	R198 045
	Low estimated spend**	R45 429	R359 224	R129 743
	High estimated spend**	R104 948	R886 480	R266 347
Direct Impact	At least	R2 665 950	R3 255 604	R2 873 104
	As much as	R4 717 860	R5 089 500	R4 575 881
Total Impact	At least	R3 785 650	R4 622 957	R4 079 807
	As much as	R6 699 361	R7 227 090	R6 497 751

*Not taking standard error into account

** Taking standard error into account.

Estimated Economic Impact (cont'd)

International best practice suggests that residential spend not be taken into account when calculating the economic impact of an event. Therefore the direct impact excluding the residents' spend would be as follows:

		2009	2010
Direct Impact	At least	R2 896 379	R2 743 361
	As much as	R4 203 020	R4 309 534
Total Impact	At least	R4 112 859	R3 895 572
	As much as	R5 968 288	R6 119 539

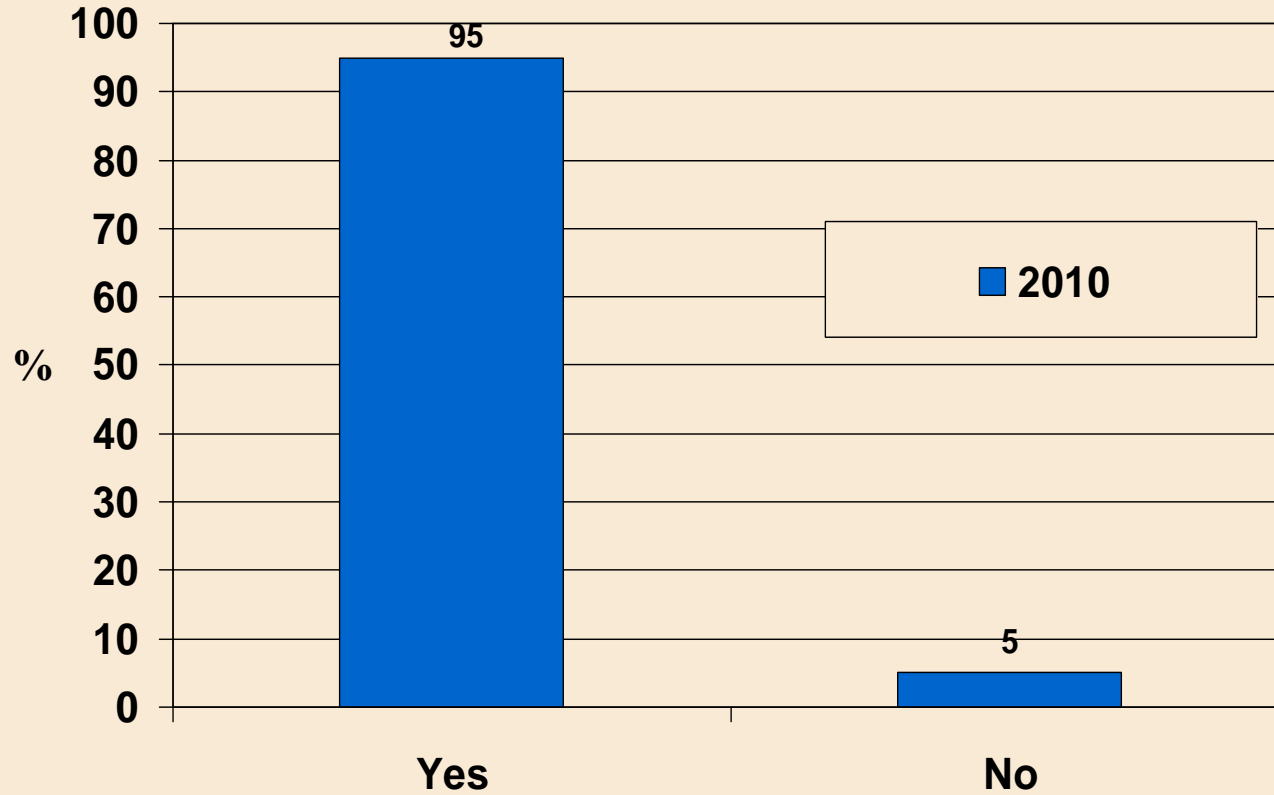


Factors that influenced decision to attend

	2004	2005	2006	2007	2008	2009	2010
Word of Mouth	63%	41%	66%	47%	59%	44%	48%
Newspaper Ads	17%	11%	6%	11%	6%	8%	9%
Invitation	16%	7%	5%	-	1%	-	-
Radio Ads	12%	27%	5%	26%	5%	18%	4%
Television Ads	5%	5%	8%	5%	9%	6%	3%
Yearly Event	5%	5%	-	-	5%	-	-
Posters/Banners/Flyers	4%	11%	-	1%	1%	1%	1%
Work	3%	3%	-	-	1%	1%	-
Other	-	-	11%	2%	14%	22%	2%
Attended previously	-	-	-	-	-	-	34%

A Z-test of two independent sample proportions did not indicate a significant difference in the proportion of respondents who were influenced by word-of-mouth when comparing 2009 and 2010.

Information Satisfaction

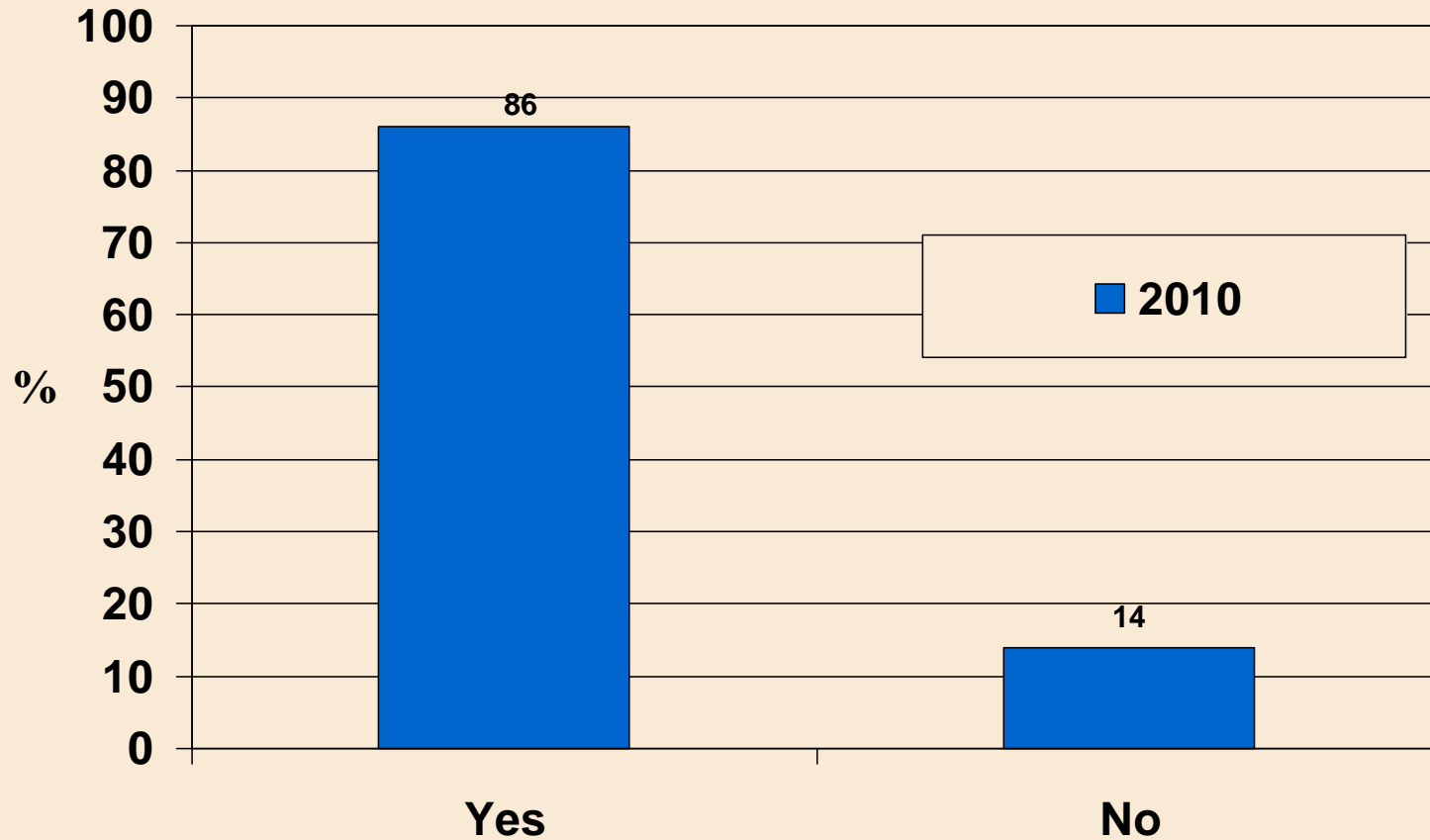


Information Satisfaction (cont'd)

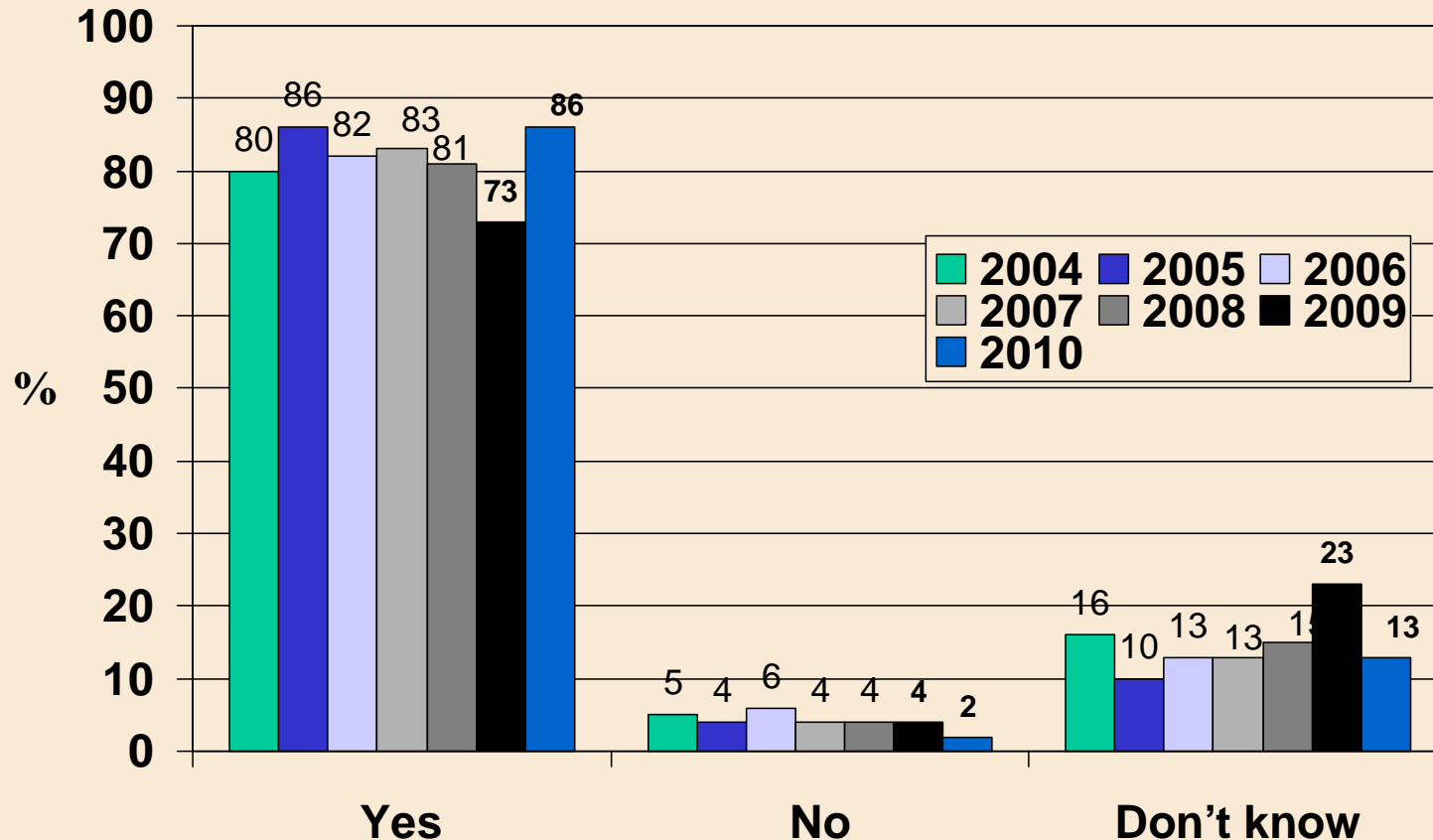
Dissatisfaction with information was related to the following:

- Lack of road signs to direct people to the venue
- Information about parking

Previous Attendance



Future Attendance



When comparing 2009 and 2010, a Z-test of two independent sample proportions indicated a significant difference in the proportion of respondents who said 'yes' to attending the event in future.

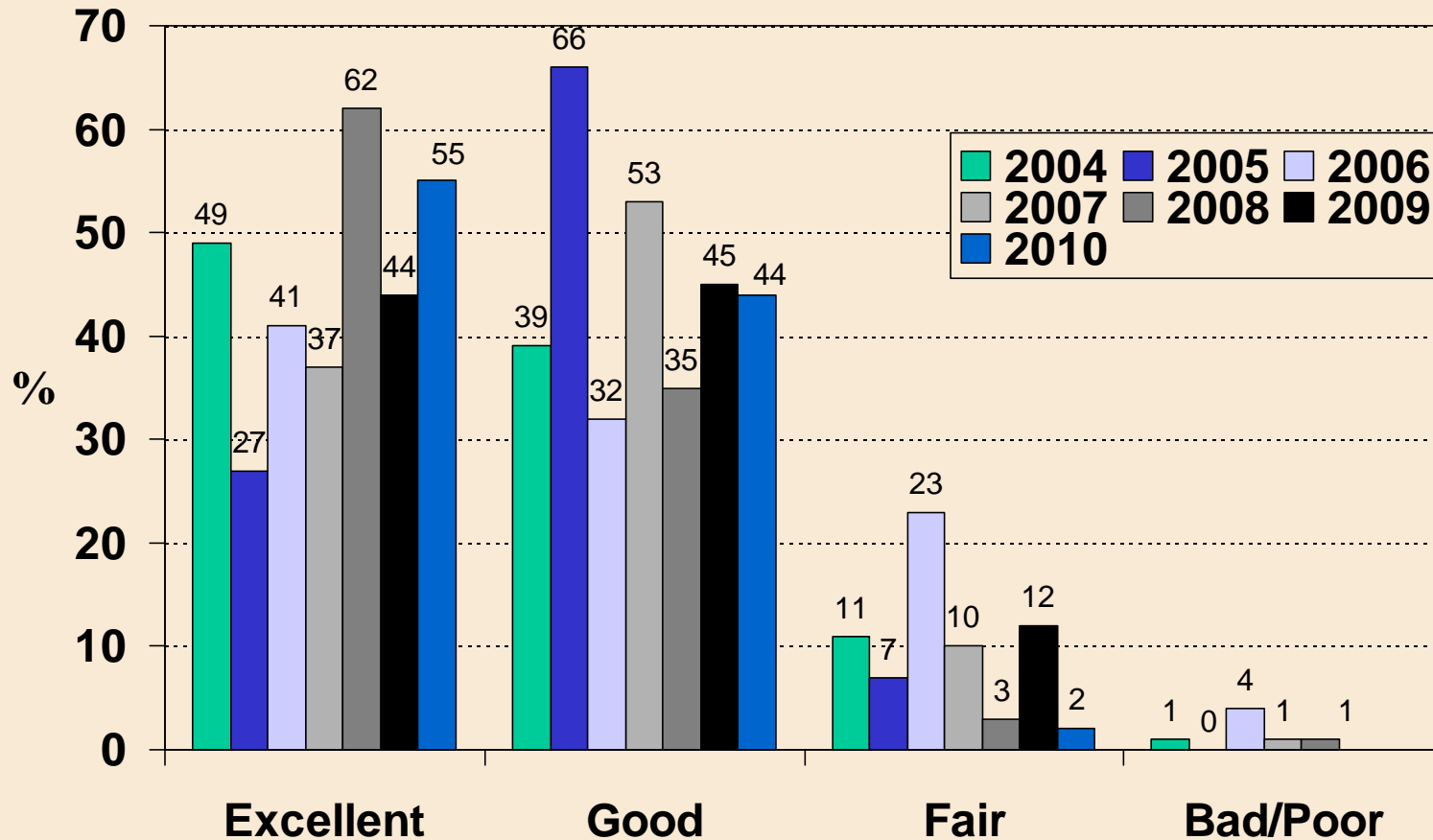
A statistical analysis could not be performed on those who were undecided (don't know) as the responses were below the minimum number required for such tests.

Future Attendance

	Yes	No	Don't know
Residents	100%	-	-
Visitors	80%	2%	18%



Perception of Event



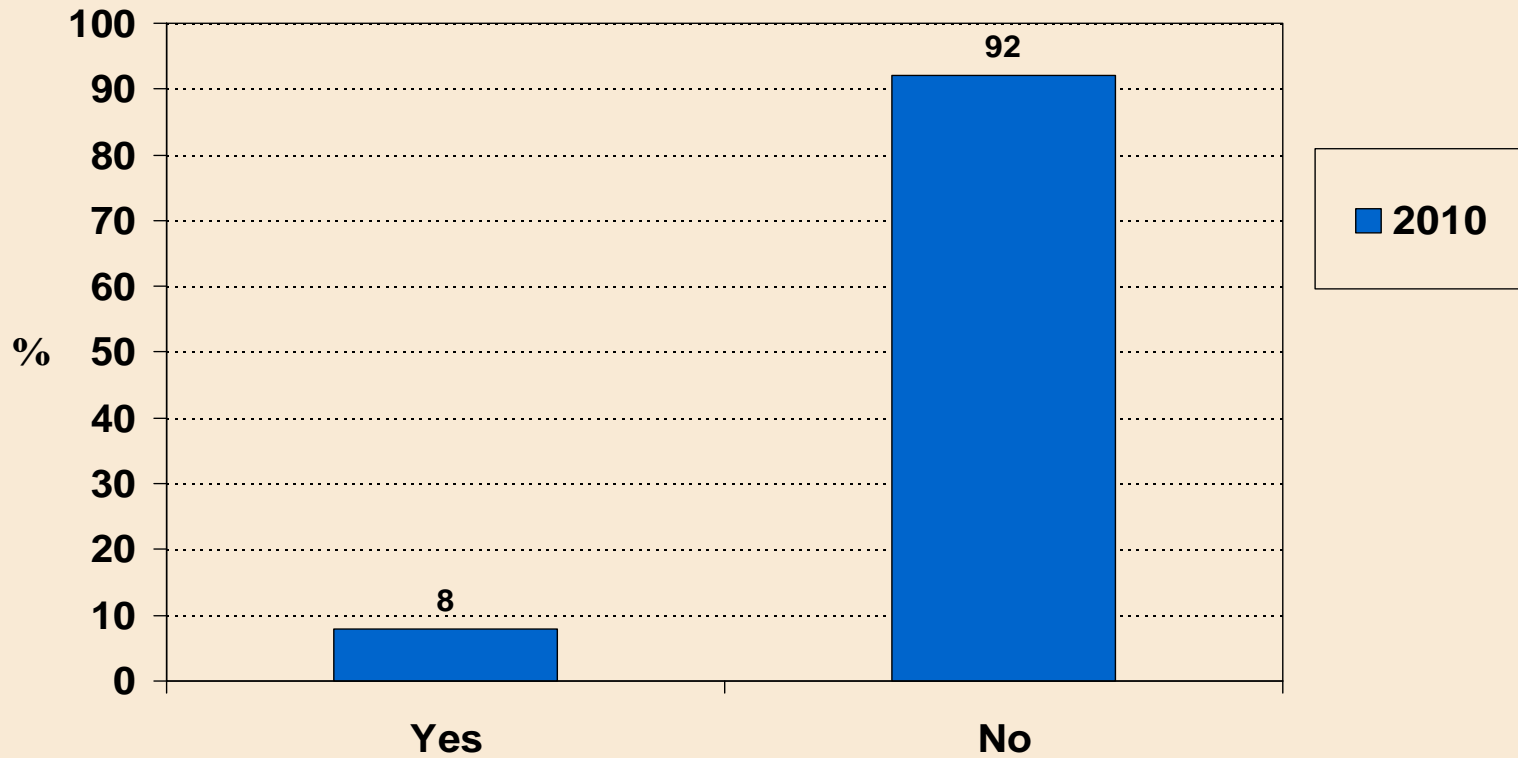
A Z-test of two independent sample proportions indicated a significant difference in the proportion of respondents who had 'excellent' experience when comparing 2009 and 2010. The probability of this assertion being false was 1.6%.

Perception of Event

	Excellent	Good	Fair
Residents	56%	44%	-
Visitors	55%	43%	2%



Experienced problems?



Experienced problems? (cont'd)

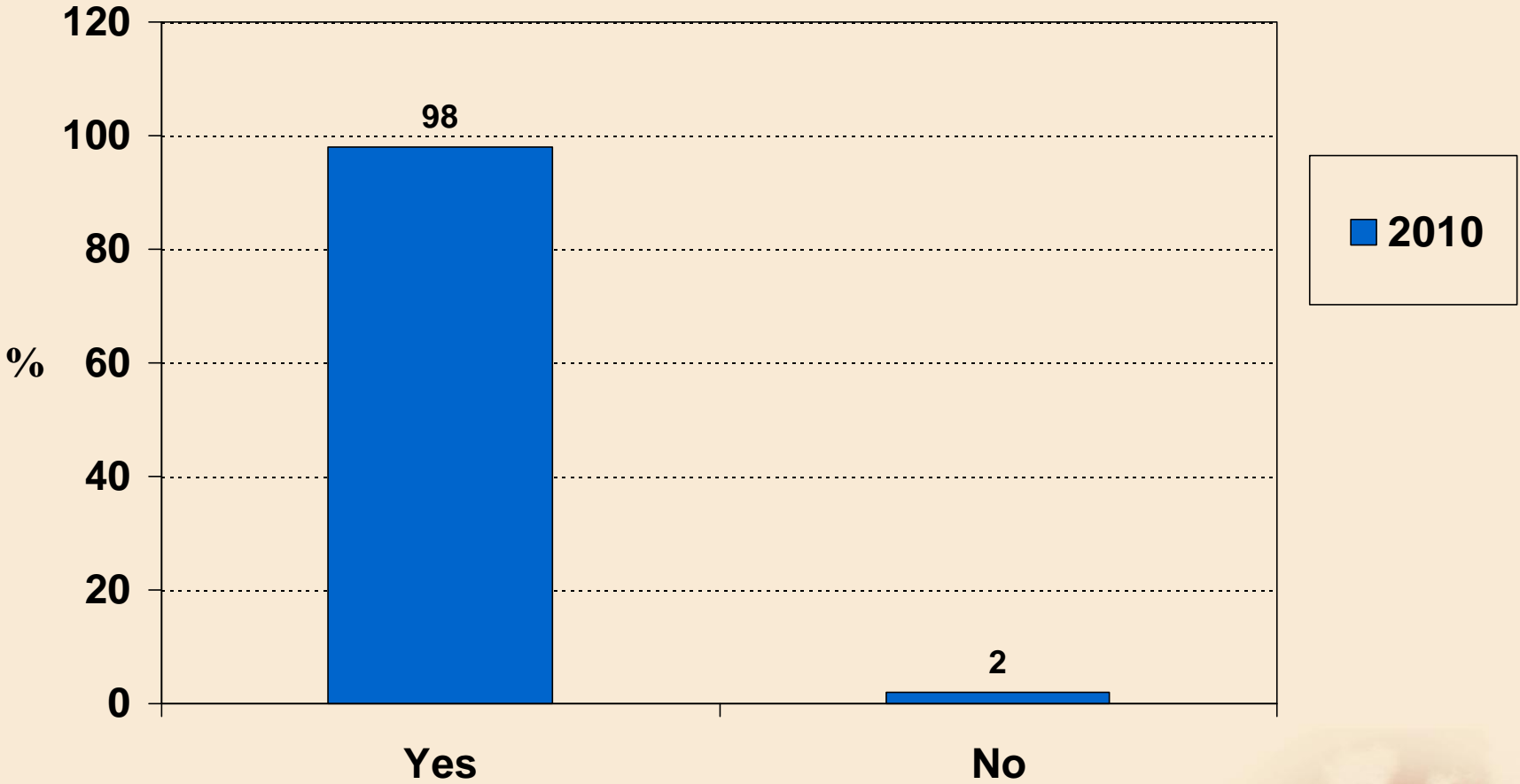
Problems experienced were associated with:

- Inadequate toilets
- The registration process
- Not enough parking / did not know where to park

Event Improvement Suggestions

- More activities to be performed by maidens such as singing/dancing
- Create more parking
- Add more toilets
- Employ people to clean toilets constantly
- Create more awareness about the event
- Provide shelter for spectators in case of bad weather
- Decent, bigger sleeping areas for maidens
- People to clean the area
- Open participation to other areas groups
- Provide infrastructure to support all cellular networks
- Create some sort of spectator participation
- Provide water tanks
- Play traditional music
- Provide tourist friendly facilities
- Time management
- Advertise the event on tv

Recommend the Event to Family & Friends?



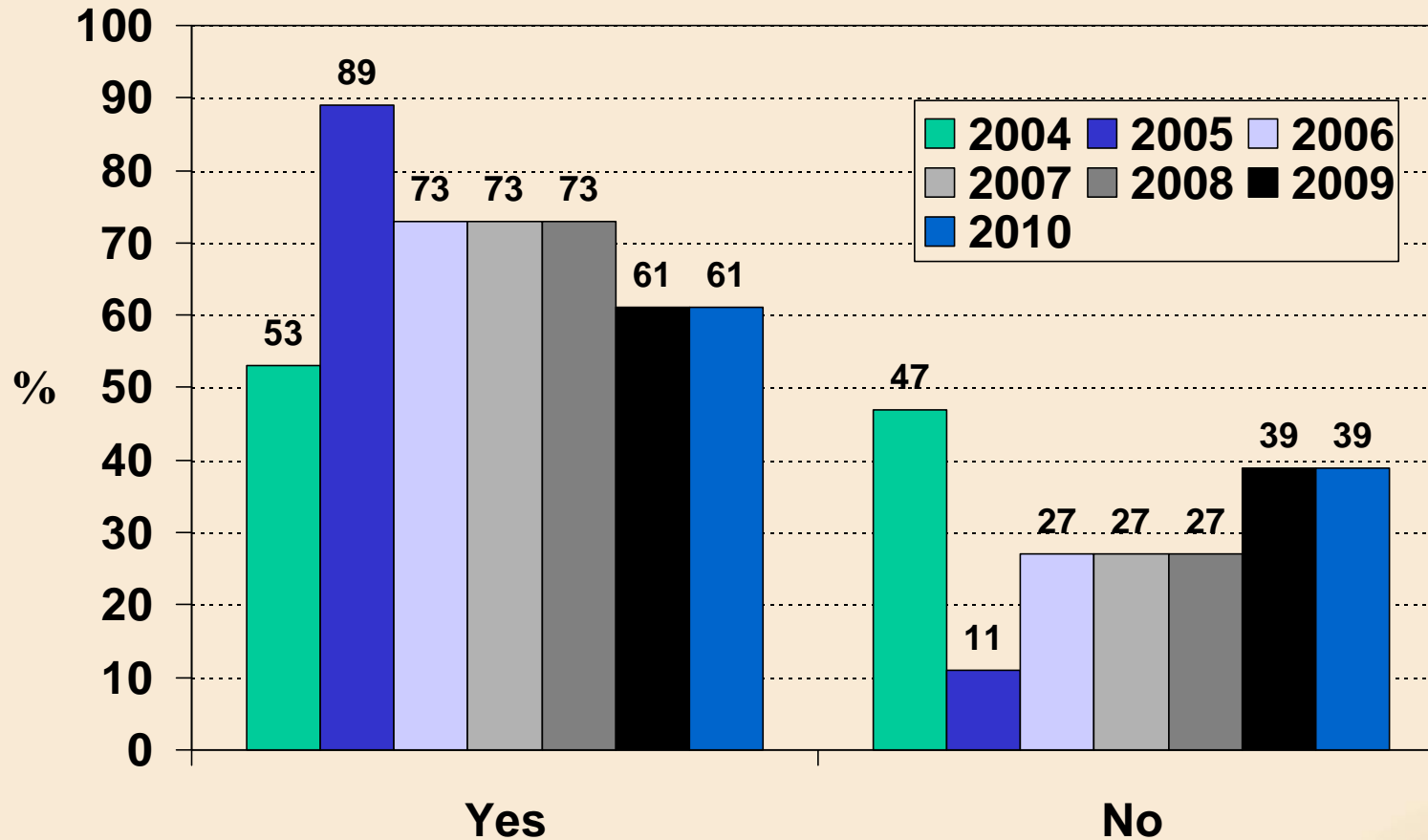
Suggested Improvements

SUGGESTIONS	COUNT (2007)	COUNT (2008)	COUNT (2009)	COUNT (2010)
More water	—	8	7	
Free drinks/water/meal	8	6	—	
Add toilets/Sanitation	12	6	12	
More shelter	10	6	3	
Security	3	5	1	
Proper time management	2	5	2	
Improve on cleanliness	—	4	2	
Supervise maidens	—	4	—	
Improve and add parking	4	4	7	
TV/radio advertising	—	3	11	
Improve and add more sleeping tents for maidens	3	3	6	
Pave the road	6	2	8	
More/wider advertising	6	2	—	7
Free accommodation	—	2	—	
Free/more transport	2	2	—	
More litter bins	—	2	—	
The event must be well organised	—	1	—	
Signage	4	1	3	
Live TV coverage	—	1	—	
Accommodation close to venue	5	—	5	
Lack of information	3	—	—	
Poor crowd/visitor control	3	—	—	
More/better facilities	2	—	—	
Pave area near big tents			4	

Suggested Improvements (cont'd)

SUGGESTIONS	COUNT (2007)	COUNT (2008)	COUNT (2009)	COUNT (2010)
Place should be watered/grass planted			4	
More shuttle buses/transport/taxis	3	—		
Emergency service			1	
Have activities for tourists			1	
Have more people controlling traffic			1	
Have food available			4	
Advertise on TV/more TV coverage				28
The event is well marketed				74
Happy/satisfied with event marketing				14
More international marketing				6
Advertise the event early				3
Create other channels of information such as through local councillors				1
Teach about the event at schools				1
The event to be open to maidens in the continent				1

Familiar with Zulu Kingdom Slogan

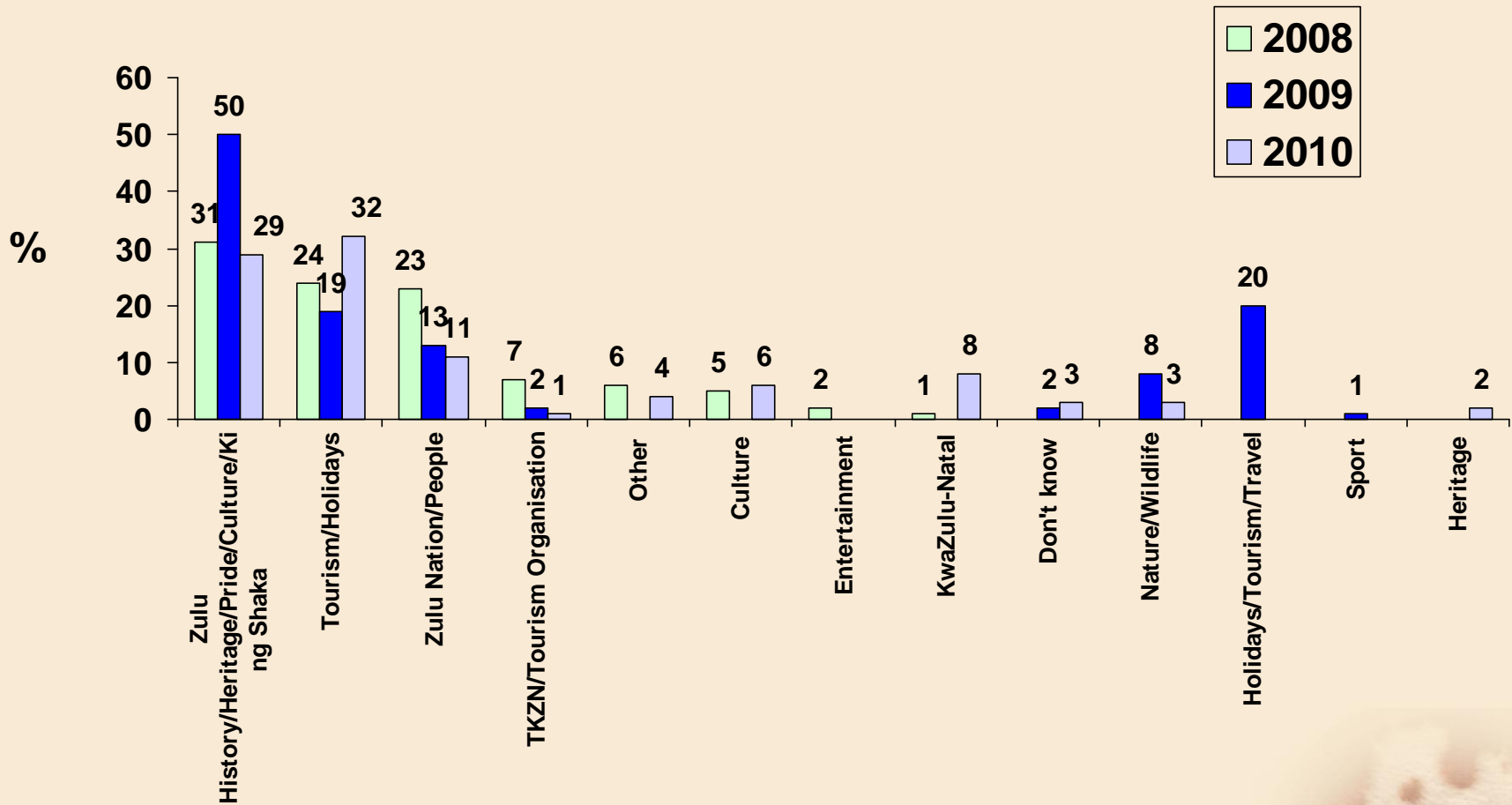


Familiar with Zulu Kingdom Slogan (cont'd)

	Yes	No
Residents	39%	61%
Visitors	69%	31%

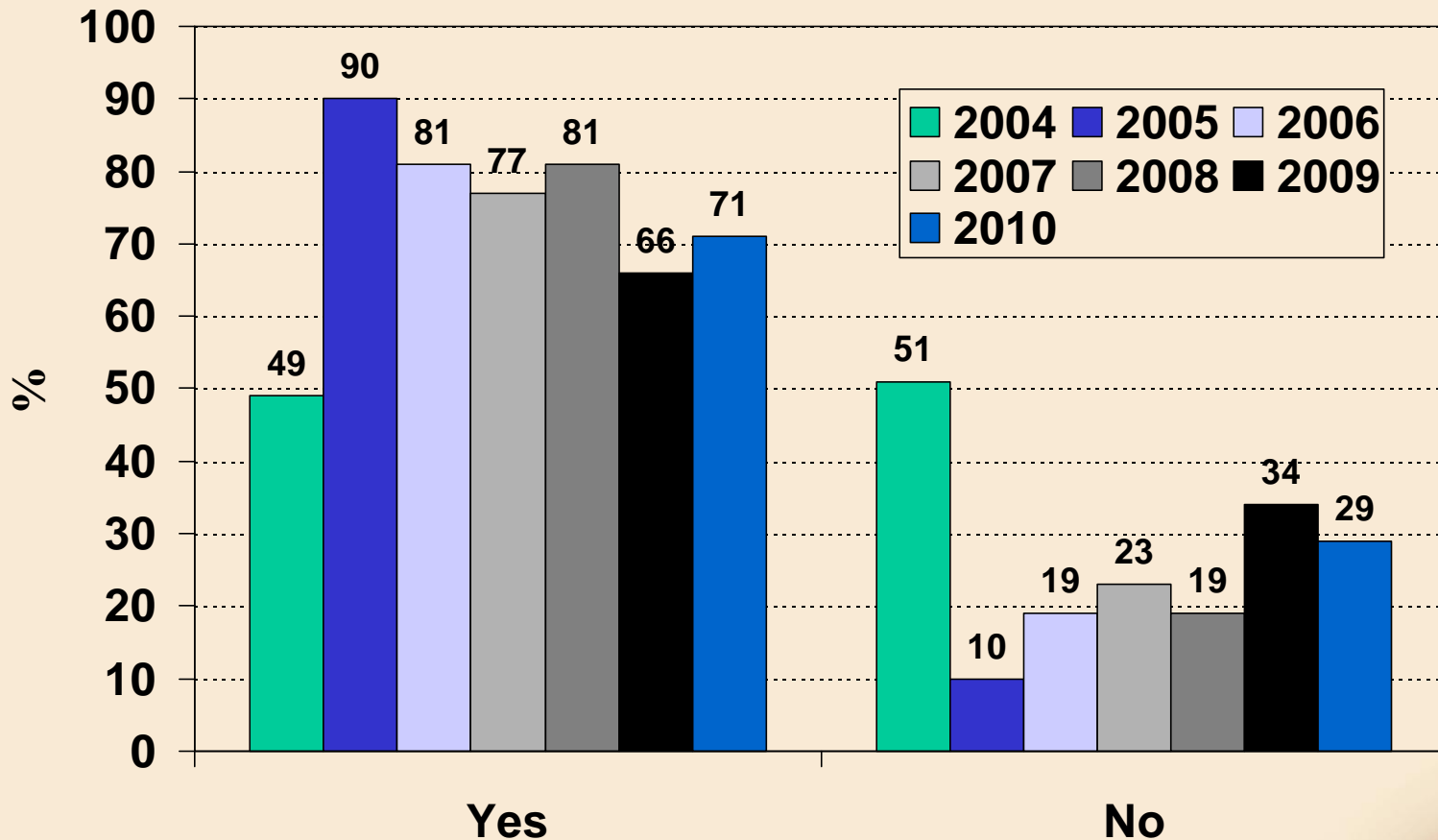


Slogan Association



When comparing 2009 and 2010, a one-tailed Z-test of two independent sample proportions indicated a significant difference in the proportion of respondents who associated the slogan with Zulu history/heritage/culture/King Shaka.

Familiar with Zulu Kingdom Logo



When comparing 2009 and 2010, a one-tailed Z-test of two independent sample proportions indicated no significant difference in the proportion of respondents who were familiar with the logo.



Familiar with Zulu Kingdom Logo (cont'd)

	Yes	No
Residents	50%	50%
Visitors	79%	21%



Findings

1. The majority of respondents were visitors (73%) and 27% were local residents. Over half of visitors (54%) were from other areas within KZN. This suggests that the Reed Dance is still dominated by visitors from within the province.
2. There was a significant increase in the proportion of respondents whose primary reason for visiting the area was the Reed Dance itself. A large proportion of respondents were day visitors suggesting that there was no opportunity to explore Nongoma and surrounding areas.
3. The main factors that influenced the respondents to attend this event were word-of-mouth and previous attendance - 86% of the respondents had attended the event before. Furthermore, there was a significant increase in the proportion of respondents who said they would attend the event in future.
This suggests the popularity of the event such that people attend annually, although many of them are from within KZN.
4. 95% of respondents indicated they were satisfied with information provided regarding the event. However, they were dissatisfied by lack of knowledge of where to park and also lack of road signs directing them to where the event was taking place.

Findings

5. The majority of respondents had a positive experience at the event. Furthermore, they provided substantial suggestions for improving the event (see slide 21). This gives an indication that there is still a room for improvement in certain planning aspect of the event which should be taken into consideration for satisfaction levels to increase.
6. 92% of the respondents did not experience any problems at the event. However, those problems that were experienced were associated with:
 - Inadequate toilets
 - The registration process
 - Not enough parking / or did not know where to park
7. In terms of suggestions for improving marketing of the event, the respondents were of the view that more TV coverage still needed to be undertaken. It must also be noted that most of them also felt that the event was well marketed.
8. 98% of the respondents said they would recommend the event to family and friends. This augurs well for future attendance/ participation and may also suggest that cultural events are still important to those that attend.

Findings

9. It was mainly the visitors who were familiar with the slogan as a further analysis indicated that 69% of visitors were familiar against 39% of residents.

Furthermore, there was a decrease in the association of the slogan with Zulu history/culture/heritage when comparing 2009 and 2010 events and more so with tourism/holidays. This may be an indication that people are starting to have an appropriate association with the Zulu Kingdom slogan.

10. There was no significant difference in the proportion of respondents who were familiar with the logo. In 2009, this figure was 66% and 71% for 2010. A further analysis showed that in 2010, 79% of visitors and 50% of residents respondents were familiar with the logo. What this point and first part of number 9 suggest is that Nongoma residents are not entirely familiar with marketing activities of TKZN.

11. Most of the expenditure was due to accommodation spend. This may give an indication that accommodation establishments around the area probably benefited through this event.



Recommendations

The following recommendations are hereby made:

1. The event is still very dominated by people from within KZN. Therefore, marketing of the event outside of the province will be essential to ensure that it attracts visitors from other provinces. An influx in visitor numbers will require that other factors mentioned below are taken into consideration to increase satisfaction levels.
2. The organizers of the event need to consider putting up road signage directing people to the venue. This will specifically cater for those people who would be attending the event for the first time.
3. Furthermore, at the main entrance, there should also be signs directing people to the parking area.
4. It is also recommended that there should be availability of water tanks and an increase in ablution facilities. Essentially tourist friendly and general facilities should be enhanced.
5. The organizers and other relevant parties should endeavour to start formal proceedings on time as this impacts on the overall perception of the event.