

# Splashy Fen Music Festival: Comparative Summary Report 2006 - 2010



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# Objectives

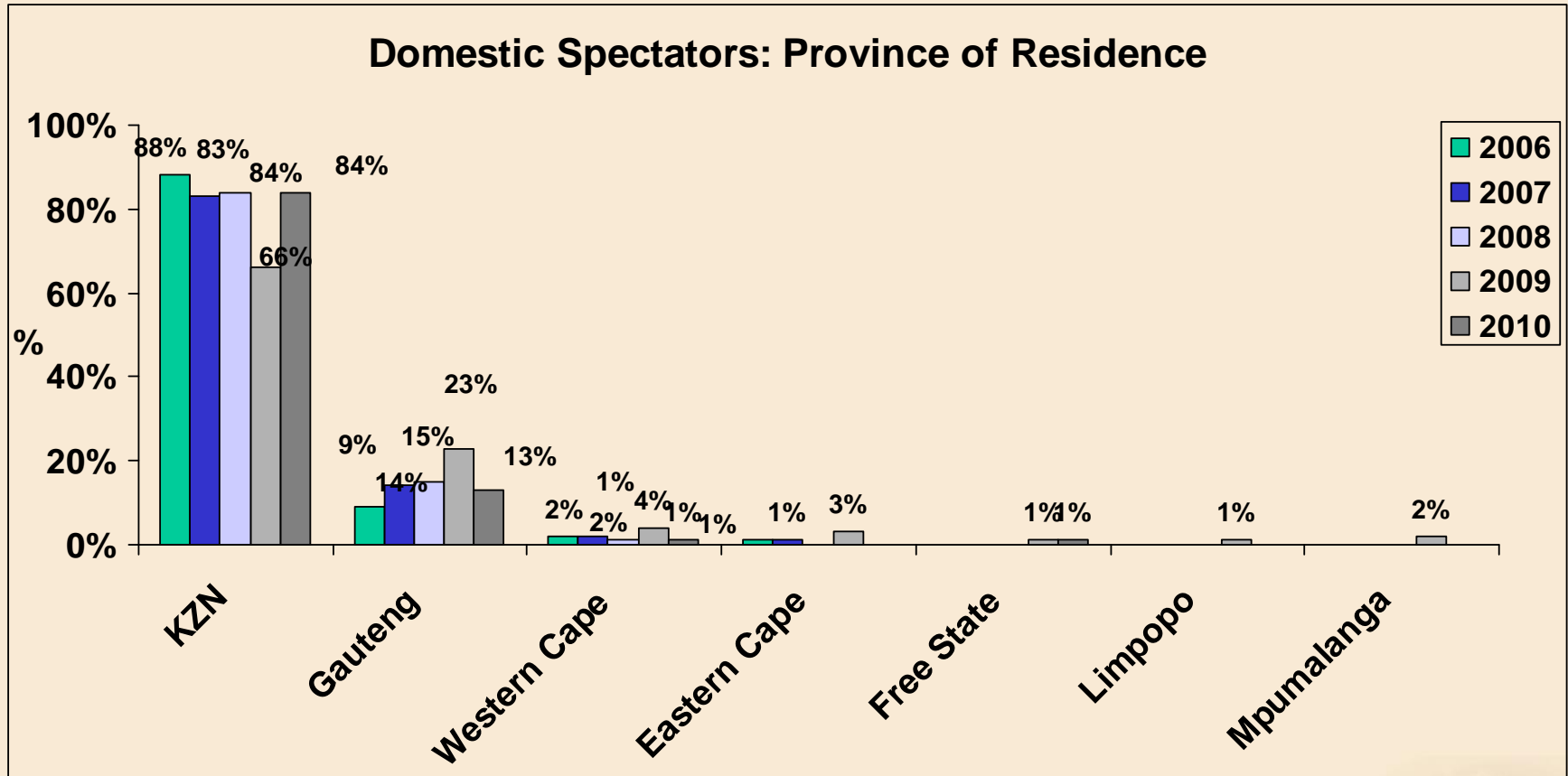
- To determine the profile of visitors to the Splashy Fen music festival in Underberg from 2006 to 2010.
- To determine what factors influenced their decision to attend this event.
- To ascertain their travel and activity patterns over the period of this event.
- To determine their perceptions of the overall organisation of the event.
- To determine the overall impact of the event.

# Methodology

- 268 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 2<sup>nd</sup> – 4<sup>th</sup> of April.



# Visitors' Residence



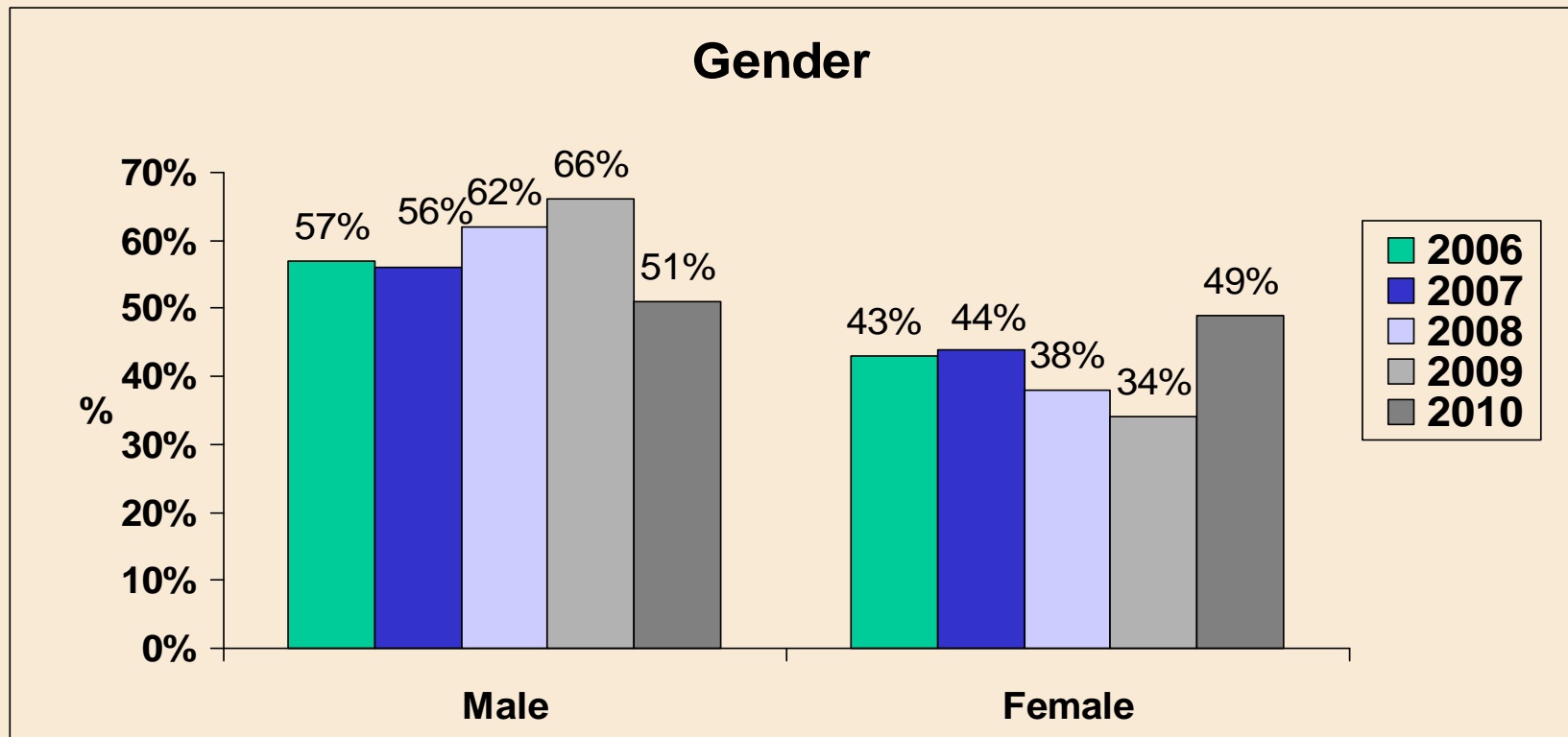
## Z Test Analysis:

A Z-test of two independent sample proportions revealed that there was a statistically significant difference when comparing KZN visitors in 2009 and 2010. There is also no significant difference in the number of Gauteng visitors between 2009 and 2010.

# Foreign Visitors' Residence

Country of Residence (Respondents)	2006	2007	2008	2009	2010
Australia		1			1
Lesotho		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

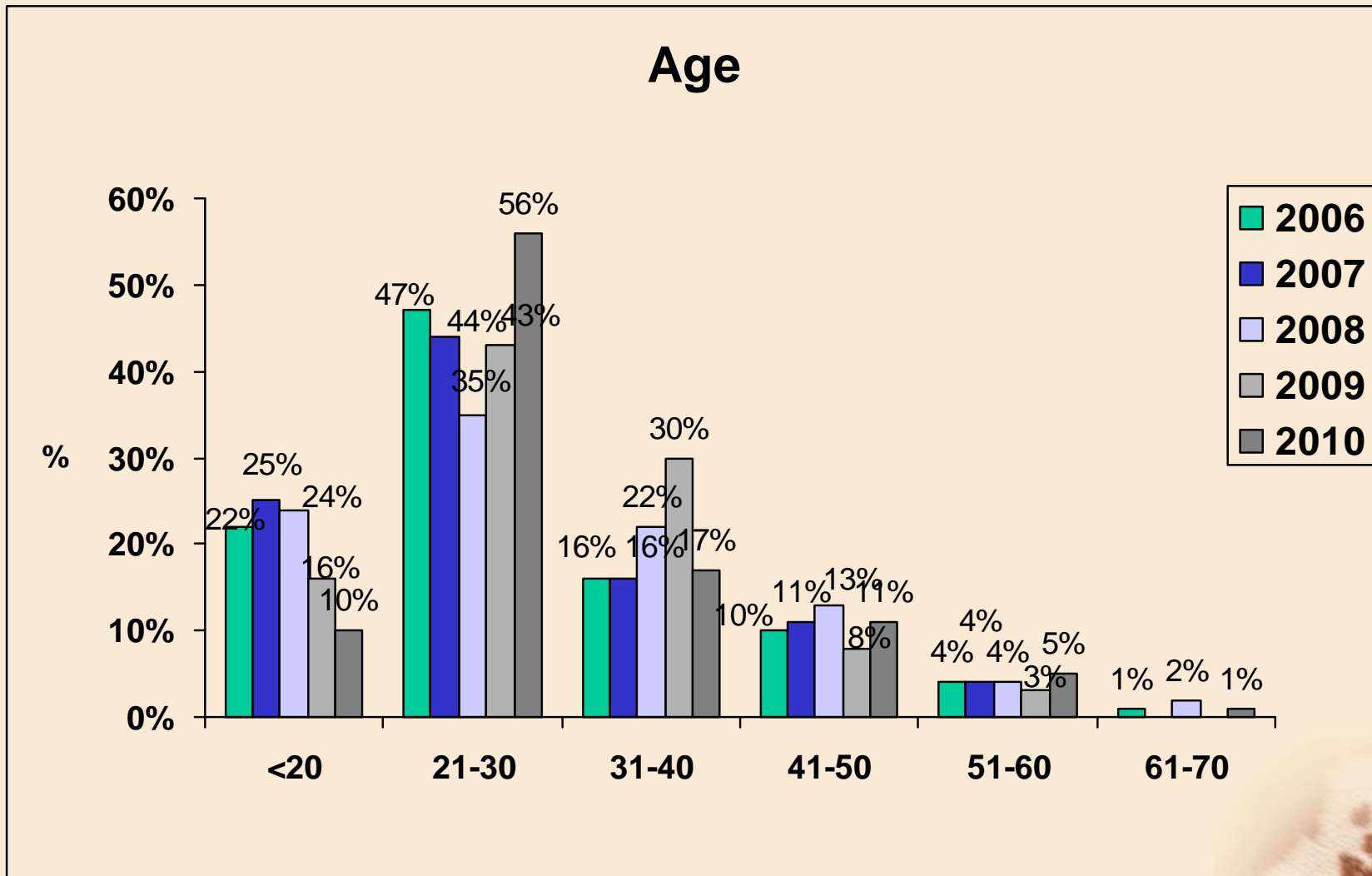


Based on a benchmark of .05 alpha, the estimated p-value of 0.0113 suggests there is a statistically significant difference between the two independent sample proportions of male visitors between 2009 and 2010.

Based on a benchmark of .05 alpha, the estimated p-value of 0.0333 suggests there is a statistically significant difference between the two independent sample proportions of female visitors between 2009 and 2010.



# Visitors' Age



A Z-test indicated no significant difference in the <20 and 31-40 ages between 2009 and 2010. However there are a significant difference in 21-30 age group between 2009 and 2010.

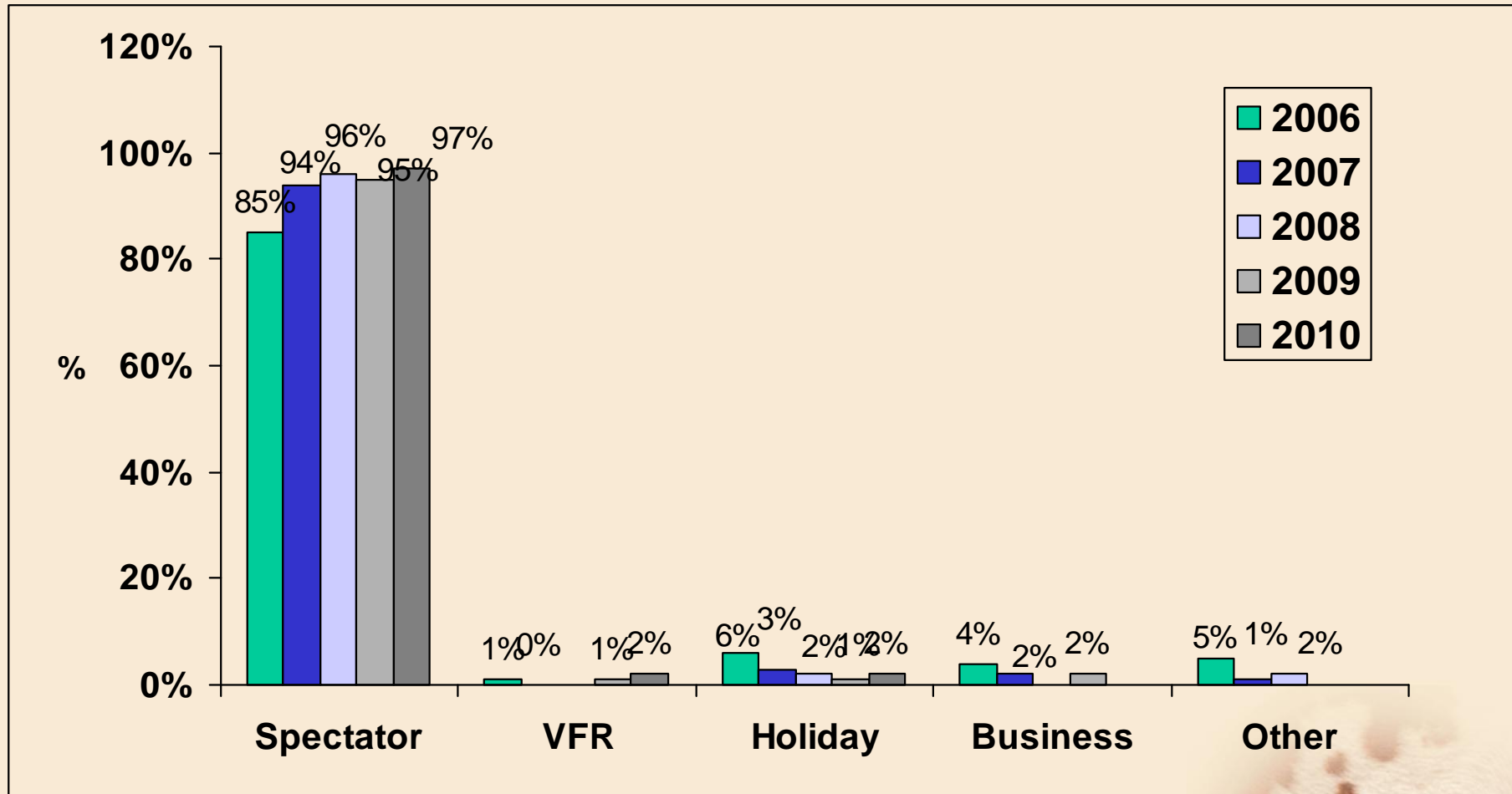
# Average Group Size

2006	2007	2008	2009	2010
10.6	9.1	6.4	6.1	6.9

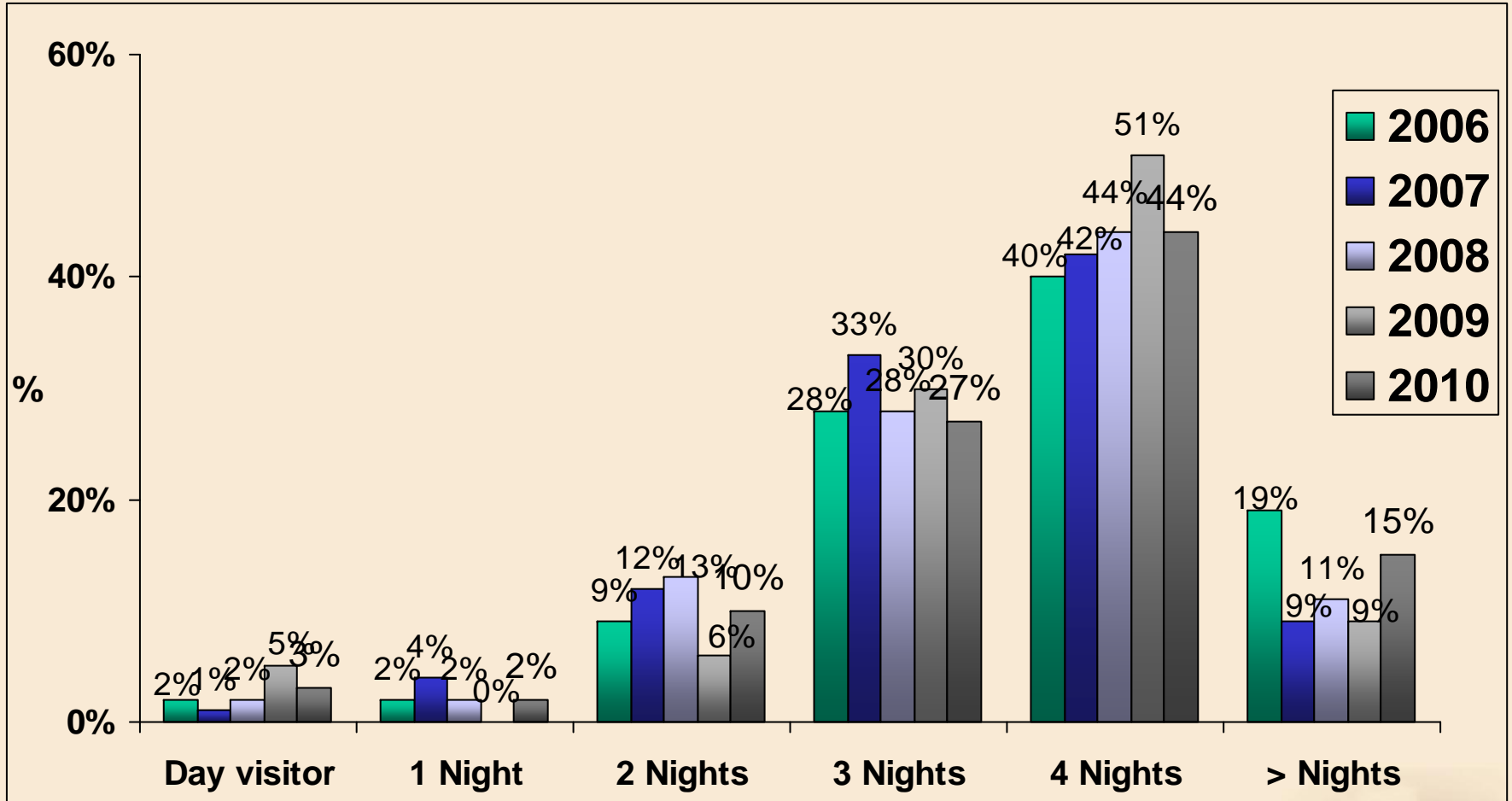




# Main reason for visiting area where event took place



# Length of Stay: Average Nights



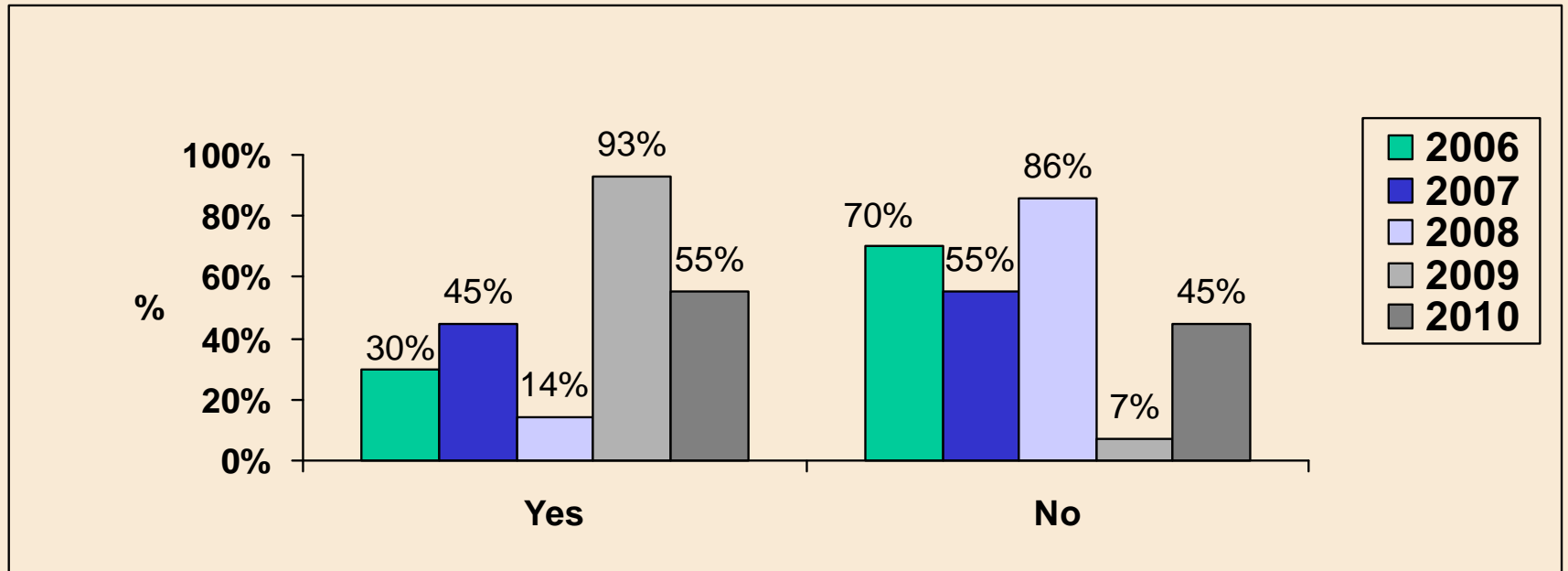
## Z-Test Analysis

A Z-test of two independent sample proportions revealed that there was no statistically significant difference in the 4 nights, >4 nights and 2 nights categories when comparing 2009 and 2010.

# Accommodation

	2006	2007	2008	2009	2010
<b>Camping</b>	97%	99%	99%	93%	99%
<b>B&amp;B</b>		1%			
<b>Luxury Hotel</b>	1%				
<b>Family Hotel</b>	1%		1%		1%
<b>Holiday Flat</b>	1%				
<b>VFR</b>	1%			2%	
<b>Home</b>				5%	

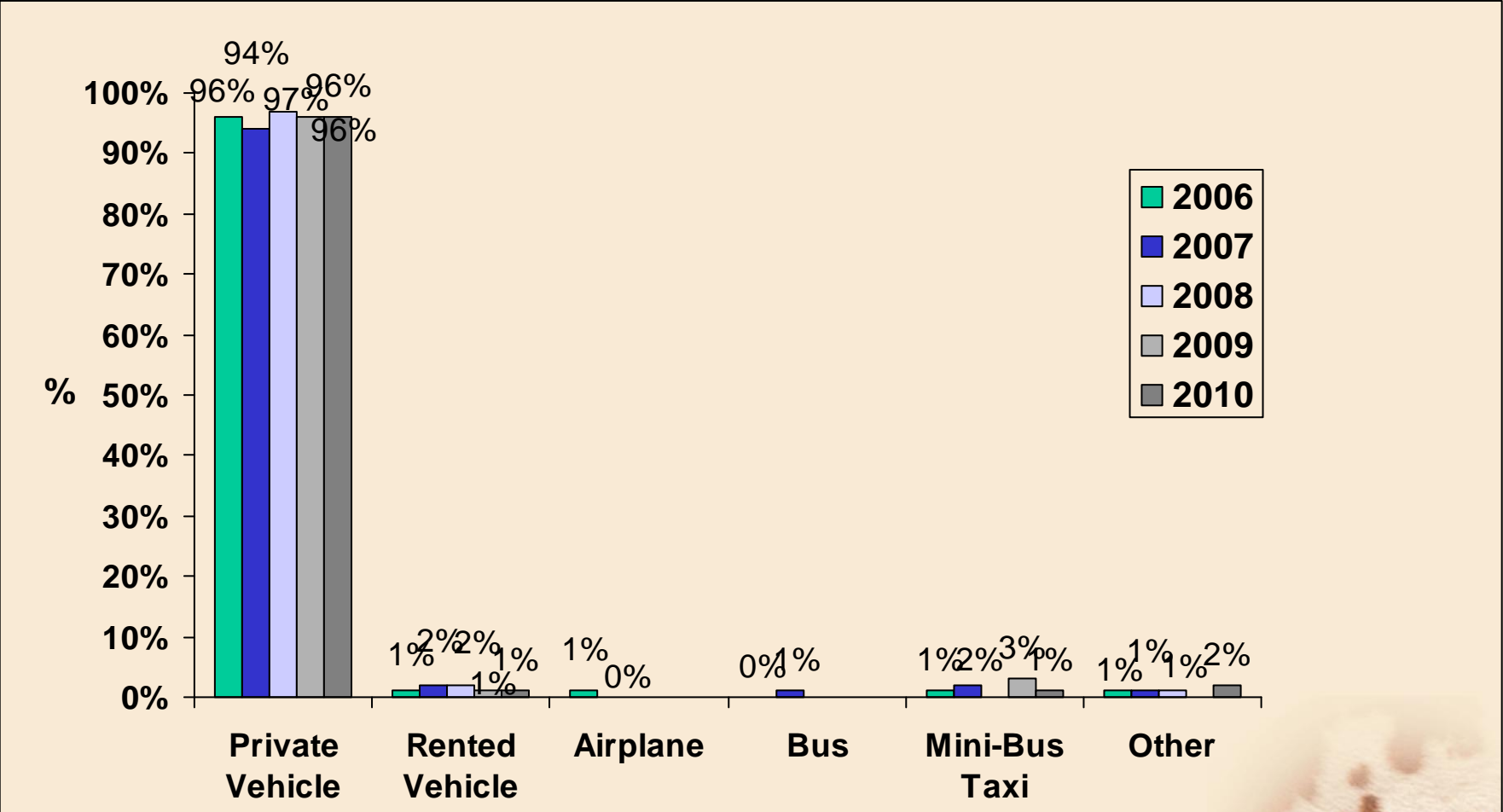
# If Splashy Fen was not your primary reason for visiting the event, did you plan your visit to coincide with the event?



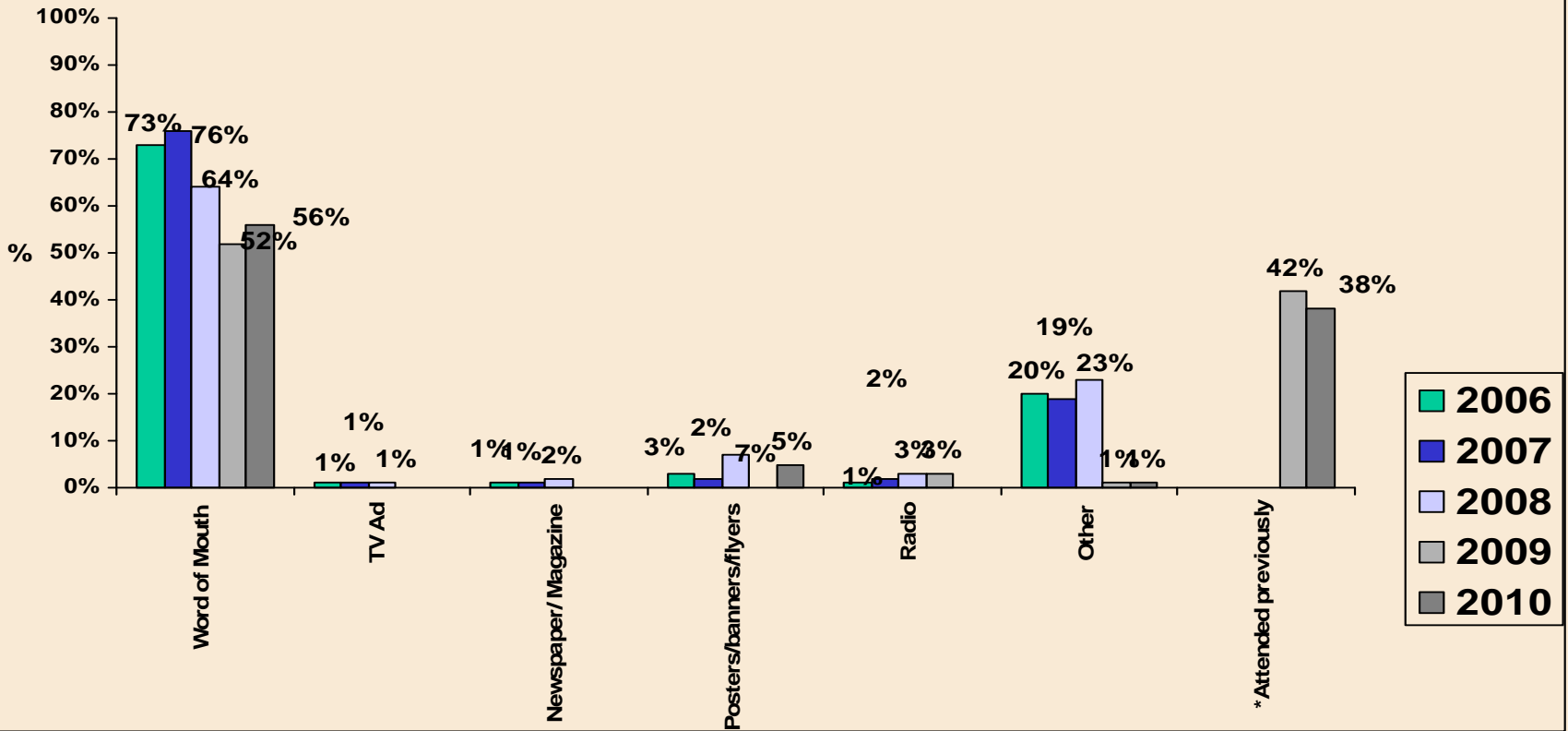
**Note:** Only 8 respondents indicated that the event was not primary reason for being in the area. This number is too small to derive any statistical significance



# Transport to Event:

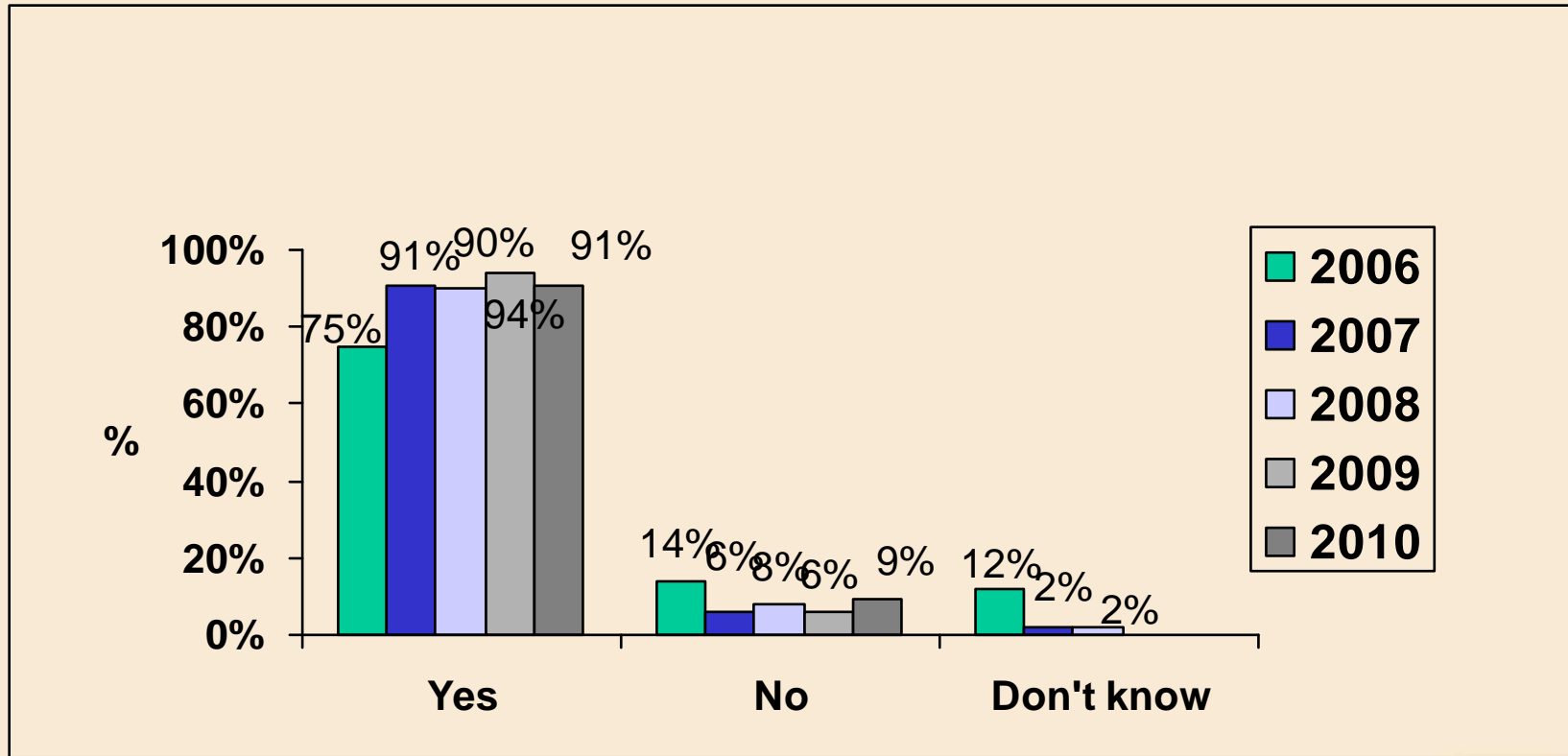


# What Influenced you to attend?

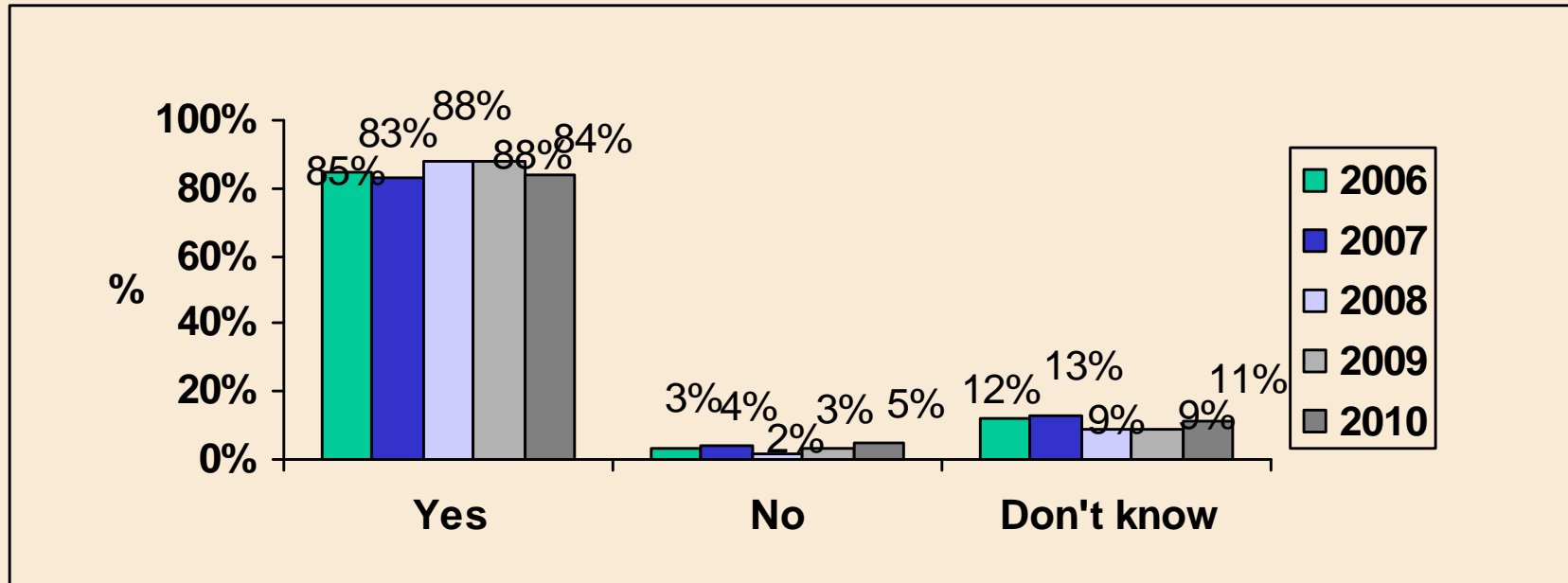


**Note:** 38% of the respondents indicated that the experience of attending the event previously influenced them to attend

# Satisfied with information?

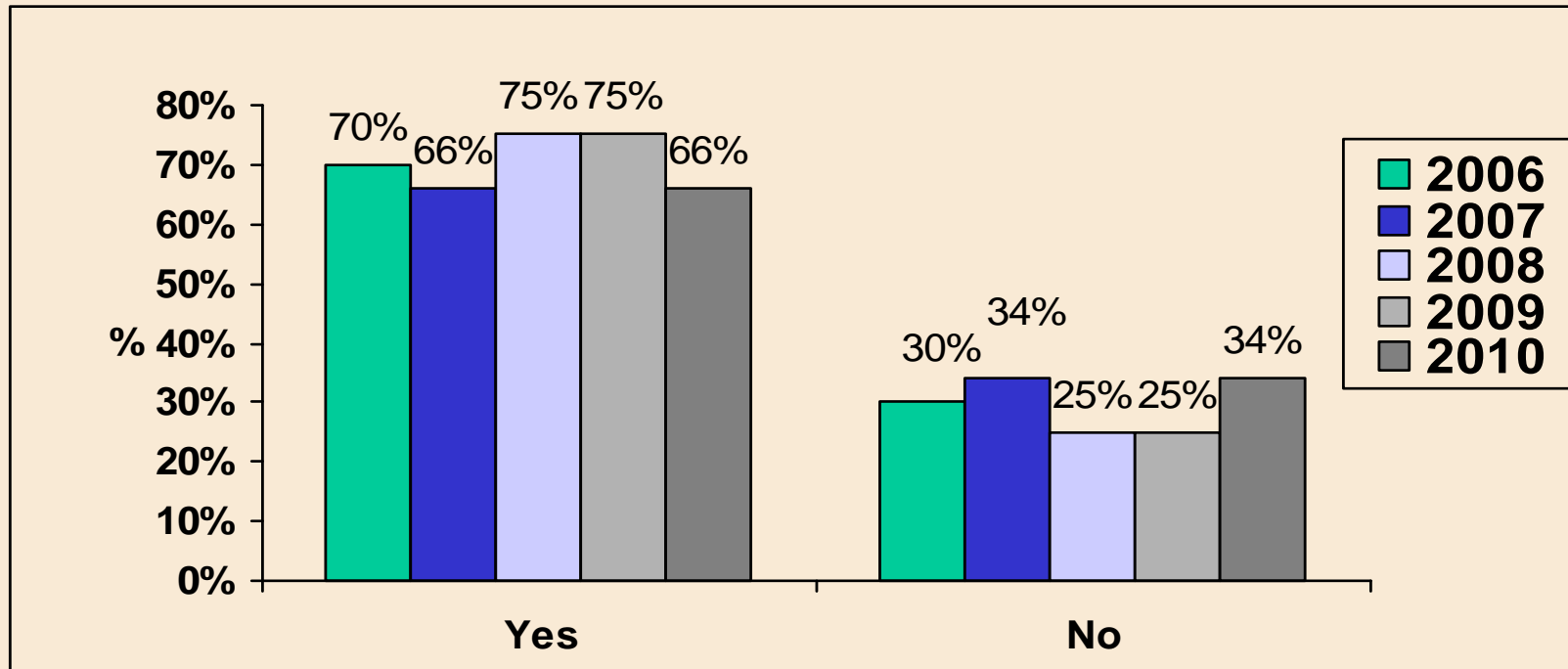


# Attend again?





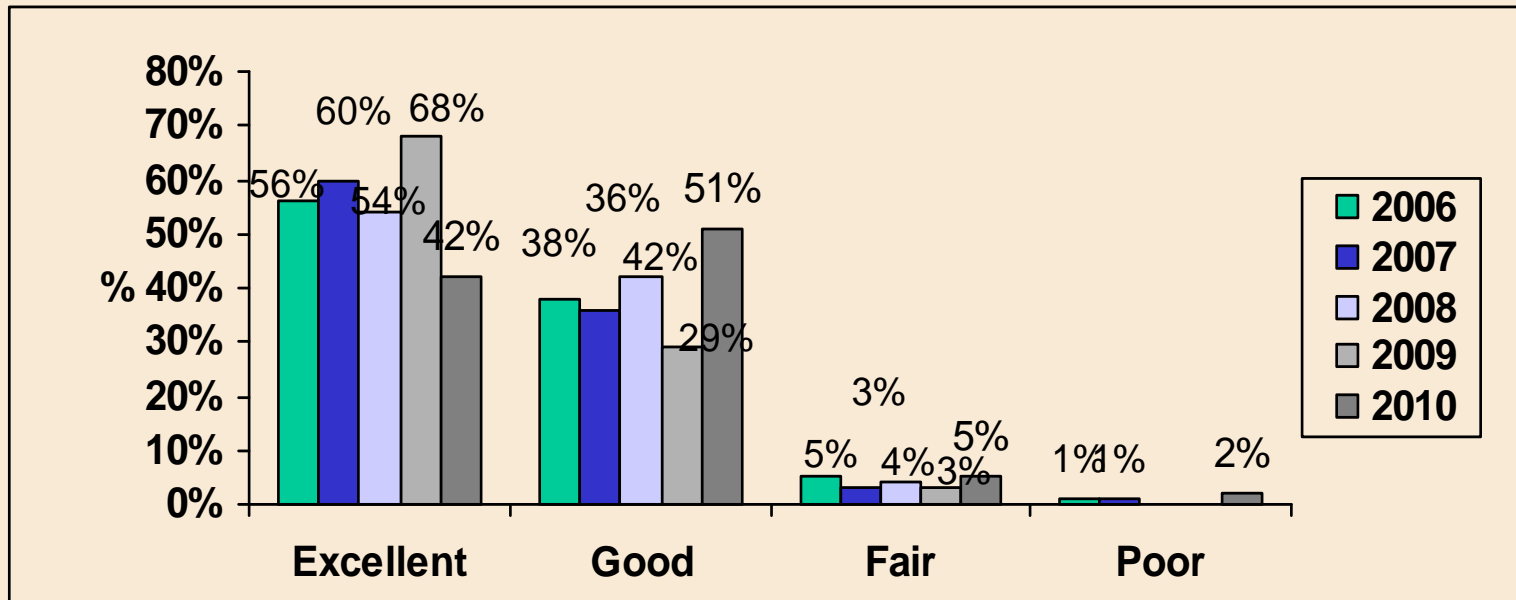
# Did you attend previously?



Note: A Z-test indicated no significant change in the number of respondents who attended previously.

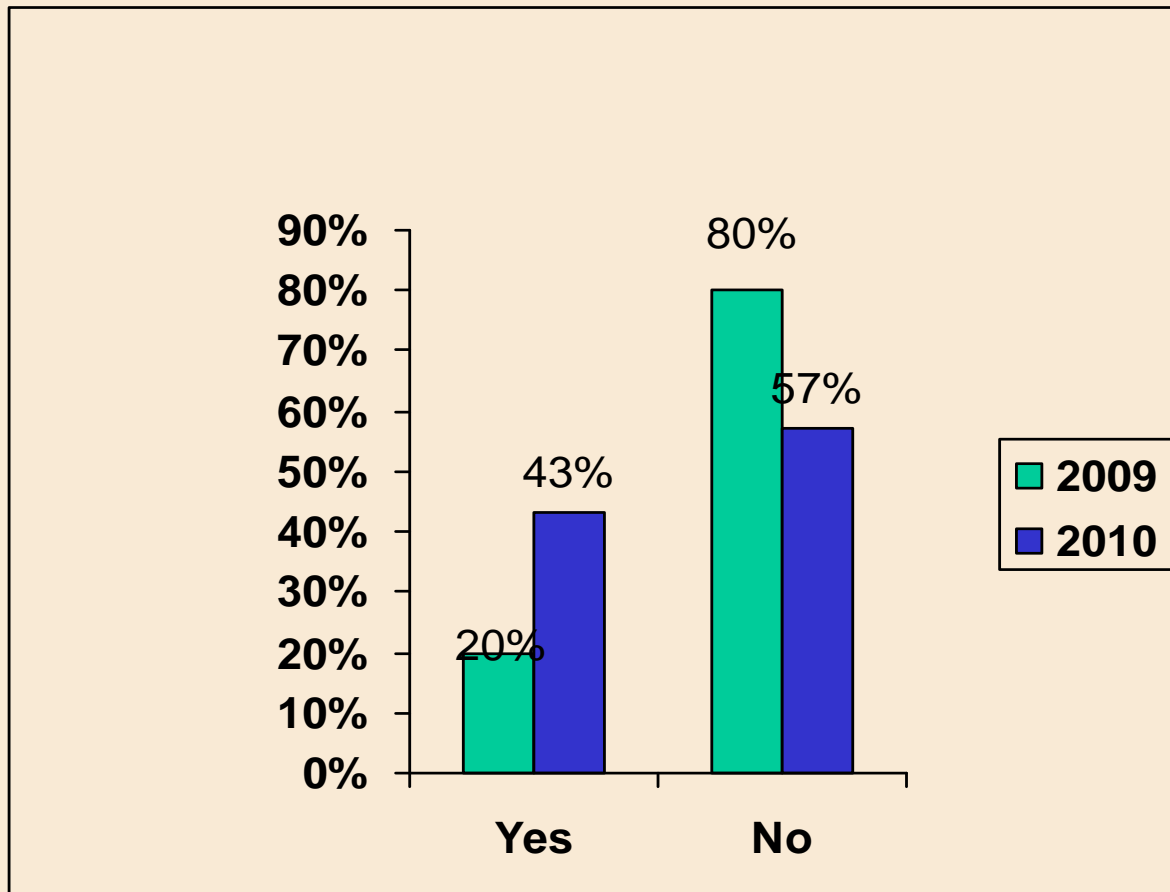


# Experience Rating



**Note:**  
A Z-test of two independent sample proportions revealed that there was a statistically significant difference in those respondents that had 'excellent' experience between 2009 and 2010 event. The probability of this assertion being false was 0.0000 or 0.0%.  
A Z-test also revealed a significant difference in those respondents that had a 'good' experience between 2009 and 2010. The probability of the assertion being false was 0.0014 or .014%.

# Experience Problem?



A Z-test of two independent sample proportions indicated a statistically significant difference between 2009 and 2010 in the respondents who did not experience any problems at the event.

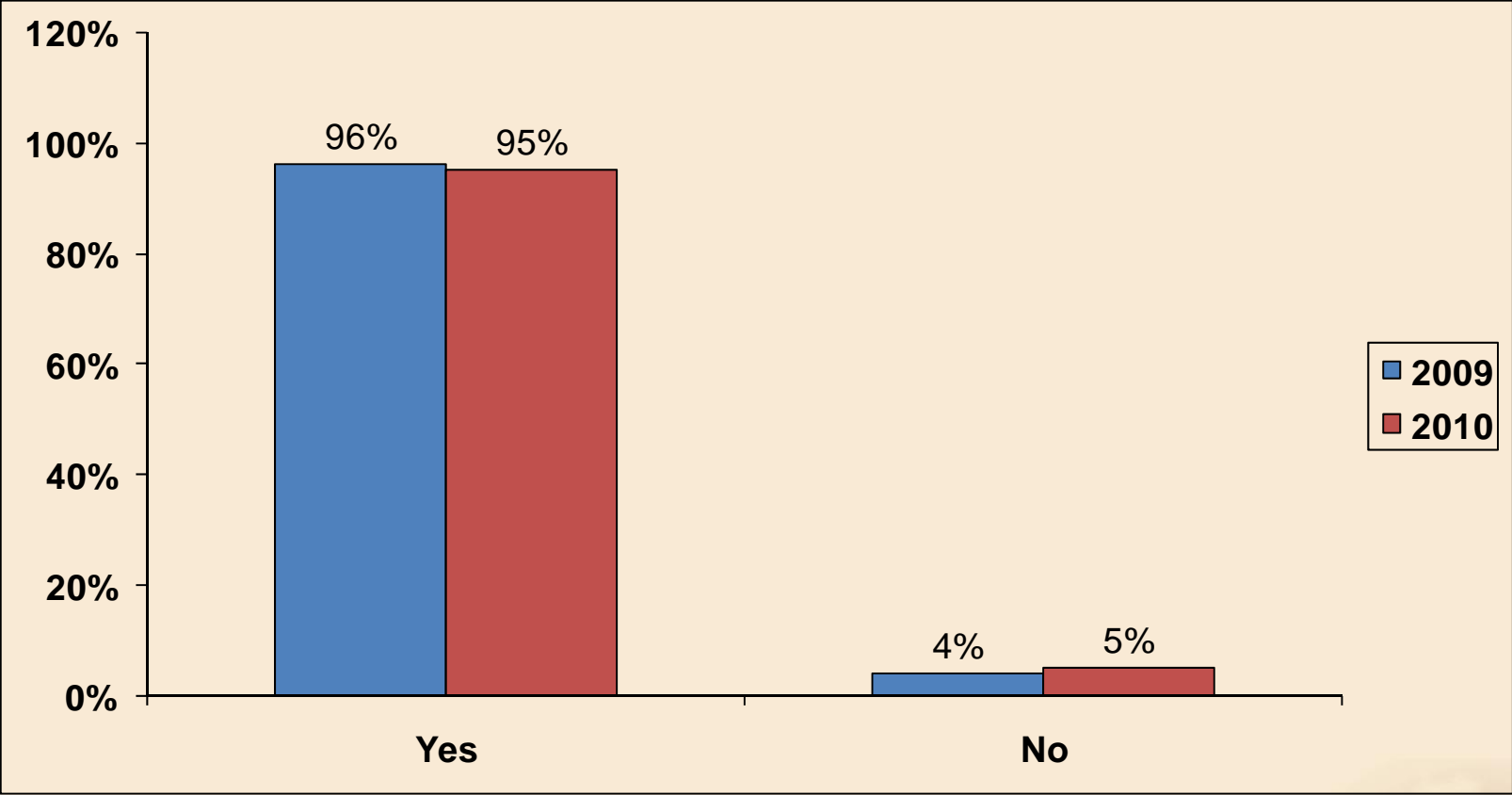
# Any Problems

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

# 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 positive ('yes') responses were related to the event having the following characteristics as perceived by the respondents:

- Enjoyable/fun/entertaining
- Relaxing/de-stressing
- Good atmosphere/experience/awesome
- Different
- Good music
- Place for freedom and expression

The few negative ('no') responses were related to the following:

- Not happy about racial tension
- Not good for children (the respondents did not indicate why)

# Total mean spend?

	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
Mean Spend	R1357.00	R1525.35	R1372.20	R1739.60	R1860.12
Low margin of error of mean at 95% confidence level	R 1240.44	R 1379.35	R 1365.23	R1625. 93	R1749.66
High margin of error of mean at 95% confidence level	R1473.58	R1671.36	R1379.78	R1853.26.	R1970.58



# Total spend breakdown

Item	Spend per Person (2006)	Spend per Person (2007)	Spend per Person (2008)	Spend per Person (2009)	Spend per Person (2010)
<b>Transport</b>	R372.07* R308.25** R 90.32***	R395.52* R350.26** R440.77***	R479.00* R475.97** R482.03***	R553.20* R509.12** R597.27***	R476.13* R420.58** R531.67***
<b>Food &amp; beverages</b>	R565.22* R500.05** R630.36***	R664.42* R567.77** R761.08***	R587.76* R509.70** R665.82**	R630.90* R578.67** R683.12***	R924.28* R848.2741** R1000.2785***
<b>Entertainment</b>	R359.27* R301.99** R416.56***	R489.15* R385.56** R592.75***	R336.86* R296.41** R377.31**	R394.60* R255.04** R534.15***	R555.56* R496.1534** R704.9578***
<b>Souvenirs &amp; other</b>	R286.64* R246.45** R326.79***	R281.18* R244.02** R318.35***	R199.81* R173.53** R226.24***	R248.50* R213.12** R283.87***	R325.15* R265.4607** R384.8455***
<b>****Tickets</b> (accommodation was included in ticket price)	-	R503.33* R427.67** R578.99***	R349.13* R313.10** R385.17***	R441.20* R430.90** R451.50***	R414.49* R413.01** R425.96***

\* 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 and 2010)

Year	Spectators	Estimated Direct Spend	Estimated direct tourism spend taking std error into account		Direct Spend with a multiplier of 1.42	Estimated total Impact 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

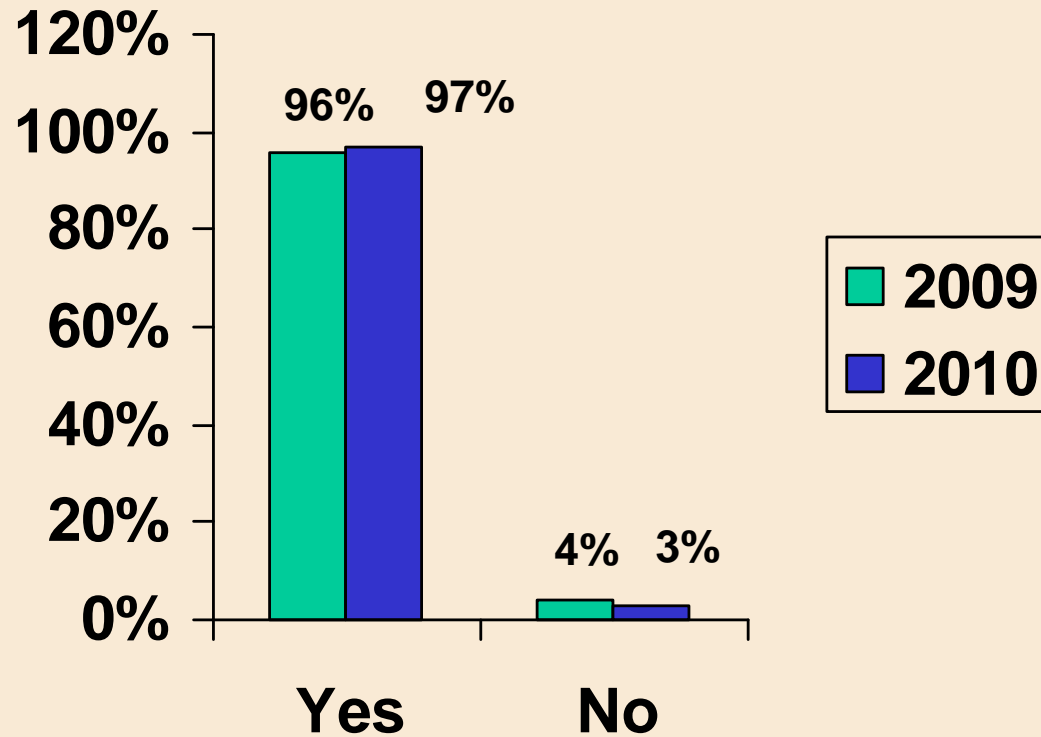
Note:

\*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 and 2010 have been re-adjusted to only include visitors whose primary reason for being in the area was the event.

# Recommend KZN as a Tourist Destination to Family & Friends?



# Characteristics or Images of KZN

Description	Count	Percentage
Beach/Ocean/Sea	134	32.8
Mountains/Drakensberg	83	20.3
Zulu Culture	43	10.5
Animals/Wild life/Game Reserves/Nature Reserves	39	9.5
Country side/Scenery	26	6.4
Sunshine/Good weather	24	5.9
Culture	14	3.4
Amazing people/Friendly	13	3.2
Sports	7	1.7
Crime	4	1.0
Durban	4	1.0
Holiday	3	0.7
Bunny chow	3	0.7
Home	3	0.7
Rivers	3	0.7
Fun	2	0.5
Grime	1	0.2
Meander	1	0.2
Pietermaritzburg	1	0.2
Riksha	1	0.2



# Atmosphere of KZN

Description	Count	Percentage
Chilled/Laid back/Relaxed/Mellow	167	51.5
Happy/Fun	43	13.3
Friendly	35	10.8
Holiday	25	7.7
Good vibe/mood	12	3.7
Hot weather/Sun/Summer	8	2.5
Festive/Party/Night life	6	1.9
Peaceful/quiet	6	1.9
Not busy/Slow pace	5	1.5
Crime/Unsafe	4	1.2
Comfortable	2	0.6
Upbeat	2	0.6
Best place to be	1	0.3
Cool	1	0.3
Corrupt	1	0.3
Dirty	1	0.3
Down to earth	1	0.3
Not great	1	0.3
Positive	1	0.3
Racial tension	1	0.3
Stressful	1	0.3



# Unique Attractions

Description	Count	Percentage
Drakensberg/Mountains	108	26.9
uShaka Marine World	71	17.7
Beach/Coast	33	8.2
Midlands Meander	19	4.7
Moses Mabhida Stadium	18	4.5
St. Lucia	10	2.5
Zulu Culture	10	2.5
Hluhluwe	9	2.2
Game reserves	8	2.0
Splashy Fen	8	2.0
Ballito	6	1.5
Good Weather	6	1.5
Sani Pass	6	1.5
Durban	5	1.2
Gateway	5	1.2
Midmar	5	1.2
North Coast	5	1.2
Oribi Gorge	5	1.2
Friendly people	4	1.0
Howick Falls	4	1.0
South Coast	4	1.0
Valley of 1000 Hills	4	1.0
Camping	3	0.7
Underberg	3	0.7
Victoria Street Market	3	0.7
Backpacker Lodges	2	0.5
Kloof Falls	2	0.5
Margate	2	0.5



# Unique Attractions(cont'd)

Description	Count	Percentage
North Beach	2	0.5
Scenery	2	0.5
Shogweni Dam	2	0.5
Shopping Malls	2	0.5
Battlefields	1	0.2
Culture	1	0.2
Don't know	1	0.2
Dragons Peak	1	0.2
Eshowe Bird Walk	1	0.2
Florida Road	1	0.2
Giants Castle	1	0.2
Golden Horse Casino	1	0.2
Hiking in the Berg	1	0.2
Ithala Game Reserve	1	0.2
Lelani Hot Springs	1	0.2
Leopards Rock	1	0.2
Lion Park	1	0.2
Mkhuze Falls	1	0.2
Monks Cowl	1	0.2
Oyster Box	1	0.2
Phezulu	1	0.2
Scuba Diving	1	0.2
Umdloti	1	0.2
Golden Mile	1	0.2
Sea Temperatures	1	0.2
Umhlanga	1	0.2
Suncoast Casino	1	0.2
Sodwana	1	0.2
Shark Diving	1	0.2
Sibaya Casino	1	0.2



# Reasons: Recommendation

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

- Beautiful Province
- Good tourism attractions
- As a result of the beach
- Friendly people
- Good weather
- Entertainment/lots to do
- Natural attractions

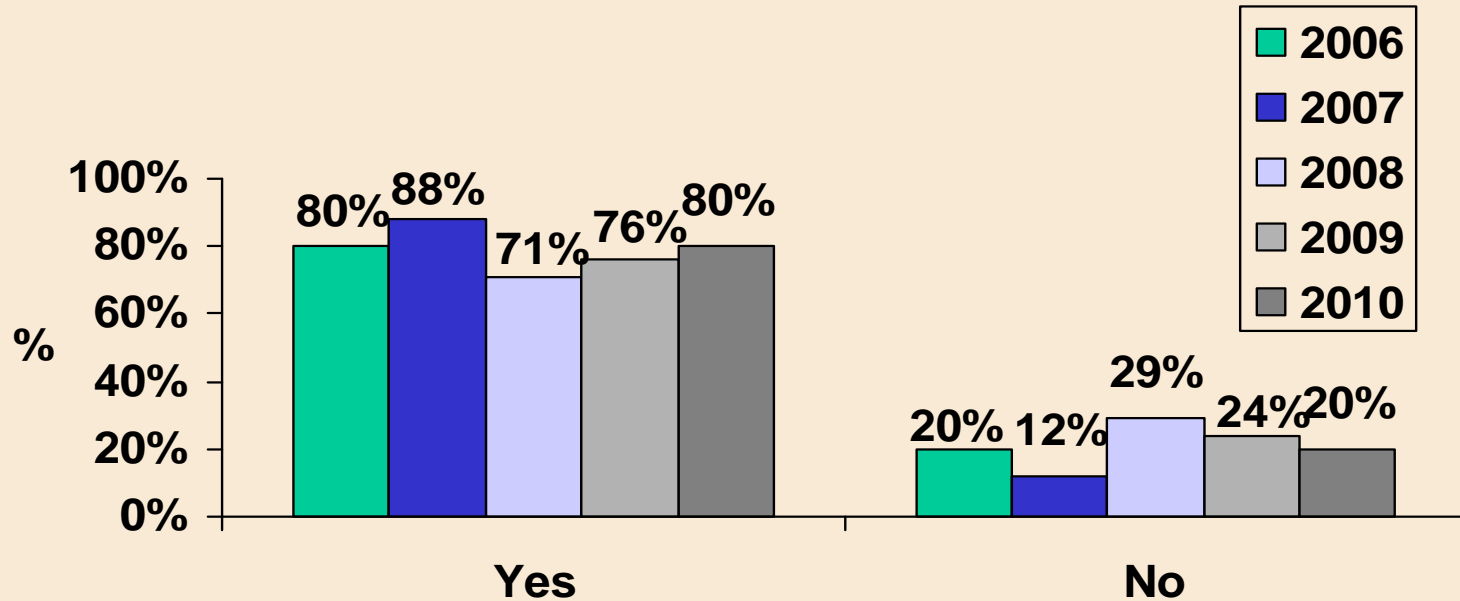
The following were noted as reasons for not recommending KZN as a tourist destination:

- Crime
- Preference of Cape Town over KwaZulu-Natal (respondents did not indicate why)





# Familiar with Zulu Kingdom slogan?



Note: There is no statistically significant difference in familiarity with the Zulu Kingdom slogan between 2009 and 2010.



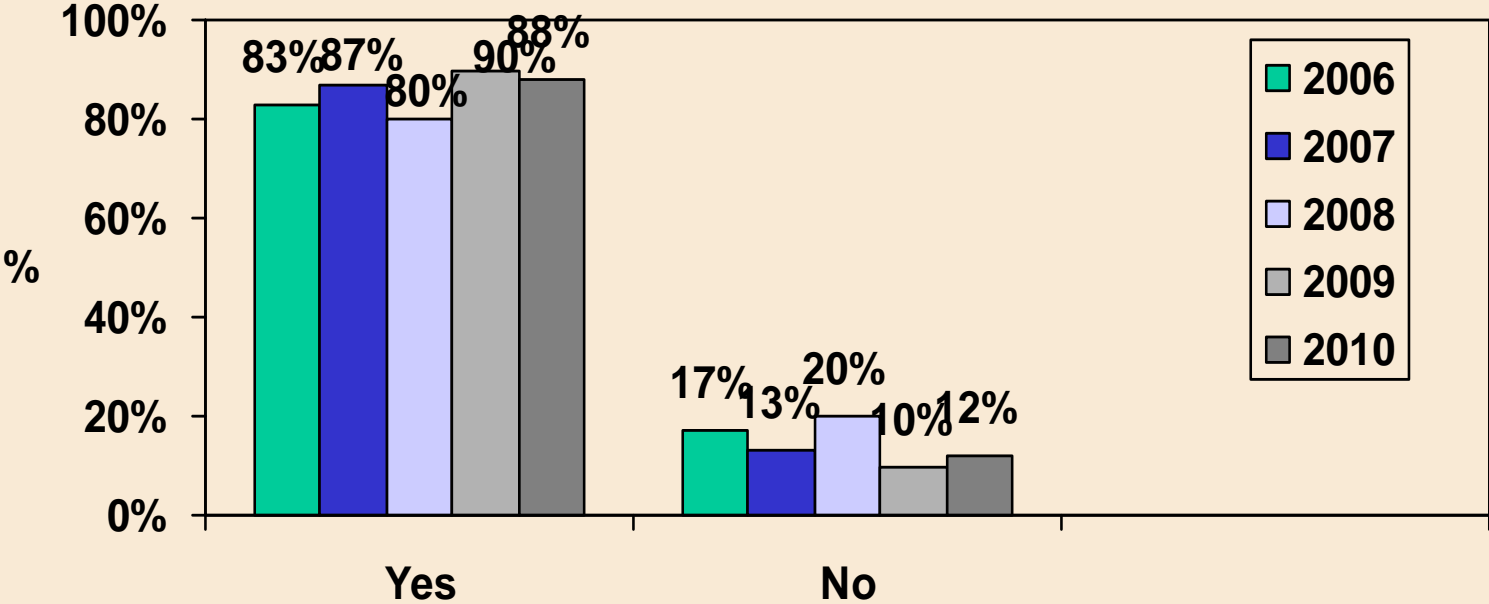
# Associations - Zulu Kingdom slogan:

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

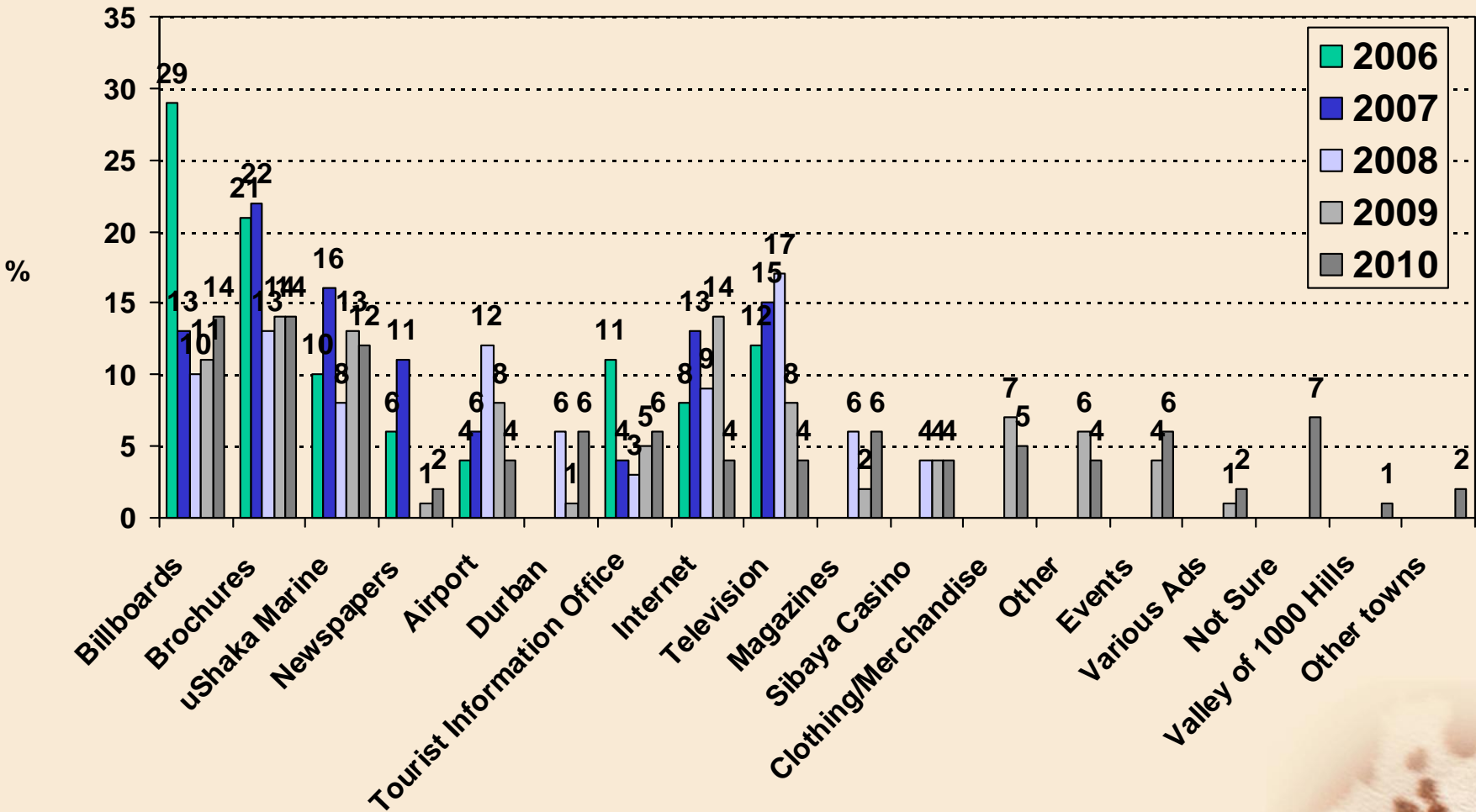
Z-test indicated no statistical significance w.r.t. *tourism/holidays*. A Z-test indicated a statistical significant increase in association with Zulu history/heritage/culture/monarchy/Shaka. However included in this category is culture which was a separate category in 2009. Significantly 12% of the respondents are not sure or do not know.



# Noted Zulu Kingdom logo?



# Where Zulu Kingdom logo noted?



# Main Findings/Conclusions

- 2010 saw an increase in KZN visitors to the event. A Z-test revealed that there was a statistically significant difference when comparing 2009 and 2010 in terms of KZN visitors. The decrease in Gauteng visitors may be attributed to the difficult economic circumstances being experienced at the moment.
- There was a significant decrease in males attending the event and a significant increase in females attending the event to almost equal to that of males. This may have an impact for the organisers of the events in terms of facilities, such as toilets. The organisers should note this change.
- There was a significant increase in the attendance of respondents in the age category of 21-30. This may be an indication of the changing appeal of the event.
- There was no statistically significant change in the number of nights stayed at the venue. However, 3 and 4 nights are still the most popular options.
- The private vehicle is still the dominant mode of transport to the event. The organisers therefore still need to factor this into logistical plans for future events, especially as the event grows, specifically with regards to access and parking.

# Main Findings/Conclusions (cont'd)

- Attending the event previously and word-of-mouth have the biggest influence on respondents attending the event. Therefore the experience at the event is important to ensure repeat visits.
- Most of the respondents indicated that they would attend the event again.
- Although there was no statistical change in the number of respondents who attended previously, there were fewer respondents who had attended the event previously. This is a good indicator showing that the event is drawing new people or first time attendees.
- There was a significant decline in the number of respondents who had an excellent experience when compared to 2009. This should be looked at in conjunction with the significant decline in respondents who did not experience any problems at the event.
- The economic impact of the event was between R16.14mn and R18.24mn. This does not take into consideration the leakage of funds out of the Underberg area. This spend was calculated using visitors only whose main purpose for being in the area was the event. Using this method the 2009 impact was between R13.7mn and R15.4mn.

# Main Findings/Conclusions (cont'd)

- The beach/seas/ocean is the most popular image of KwaZulu-Natal, followed by the mountains/Drakensberg and Zulu Culture.
- The atmosphere is mostly described as chilled/laidback/mellow followed by happy/fun and friendly.
- The unique attractions are the Drakensberg/mountains, uShaka Marine World and the beach/coast.
- 95% of respondents indicated that they would recommend KZN as a tourist destination. The following were noted as reasons for recommending KZN:
  - Enjoyable/fun/entertaining
  - Relaxing/de-stressing
  - Good atmosphere
  - Place for freedom and expression
- There was an increase in the average group size to 6.9 from 6.1 in 2009.

# Main Findings/Conclusions (cont'd)

## Main findings pertaining to Tourism KwaZulu-Natal's marketing activities

- 80% of respondents were familiar with the Zulu Kingdom slogan. This figure was 76% in 2009. A Z-test of two independent sample proportions revealed that there was no statistically significant difference when comparing 2009 and 2010.
- It is interesting to note that 14% of respondents associated the slogan with tourism/holidays. This was a dramatic decrease from 2009 where 36% had linked the slogan with this association. No reasons were given.
- 12% of the respondents do not know or are not sure of the associations of the Zulu Kingdom Slogan.
- 41% of the respondents associated the slogan with Zulu heritage/culture/monarch/Shaka and only 14% associated it with tourism/holidays.



# Recommendations

The recommendations are based on the main problems that visitors experienced. Although a large proportion (57%) of them did not experience any problems, it is still advisable to attend to those few that were raised:

- It is recommended that the number of toilets/ablution facilities be increased.
- It is also recommended that the number of showers be increased so as to reduce the waiting period that respondents complained about.
- Cleanliness of toilets issue
- Theft issue
- Rubbish bin issue
- Drunkenness
- Monitor the loud car music
- Reduce the length of the breaks between acts
- Increase the diversity of the music

# Recommendations

- The associations of the slogan with tourism, holidays and KwaZulu-Natal needs to be strengthened.
- Images, characteristics and unique attractions of the province that respondents mentioned tends to indicate that the domestic market does associate culture with KwaZulu-Natal. TKZN needs to take cognizance of what respondents see KwaZulu-Natal as providing as an experience.
- The event organisers need to continue to market this event as a unique, must-attend event, due to the increasing number of events or attractions during this time of the year. Consumers have learnt to be discerning with regards to how their money and time is spent as a result of the recent economic recession. They are more than ever looking for value for money, including in terms of events they attend.