

Reed Dance 2008 Impact Assessment: Top Line Summary Report

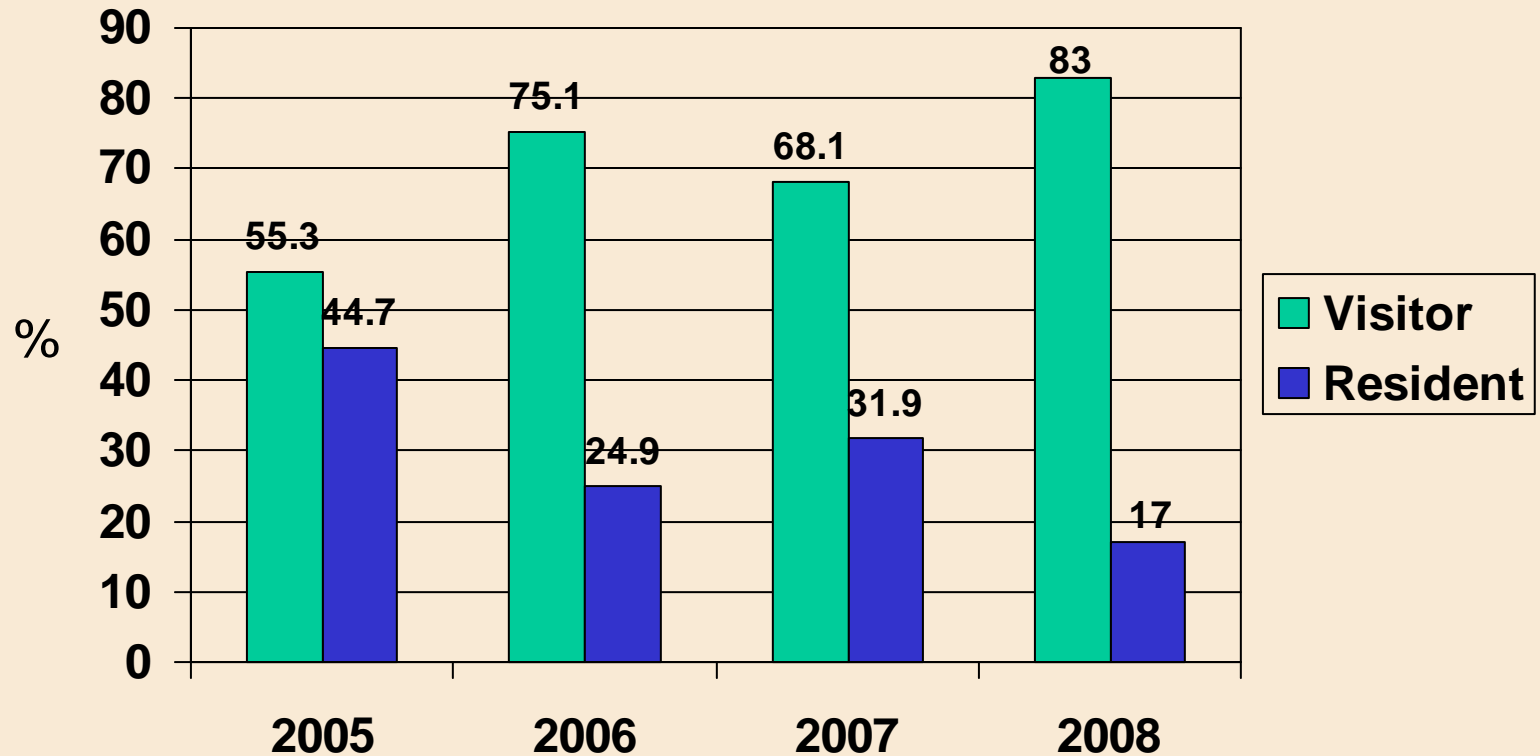
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December 2008



Methodology

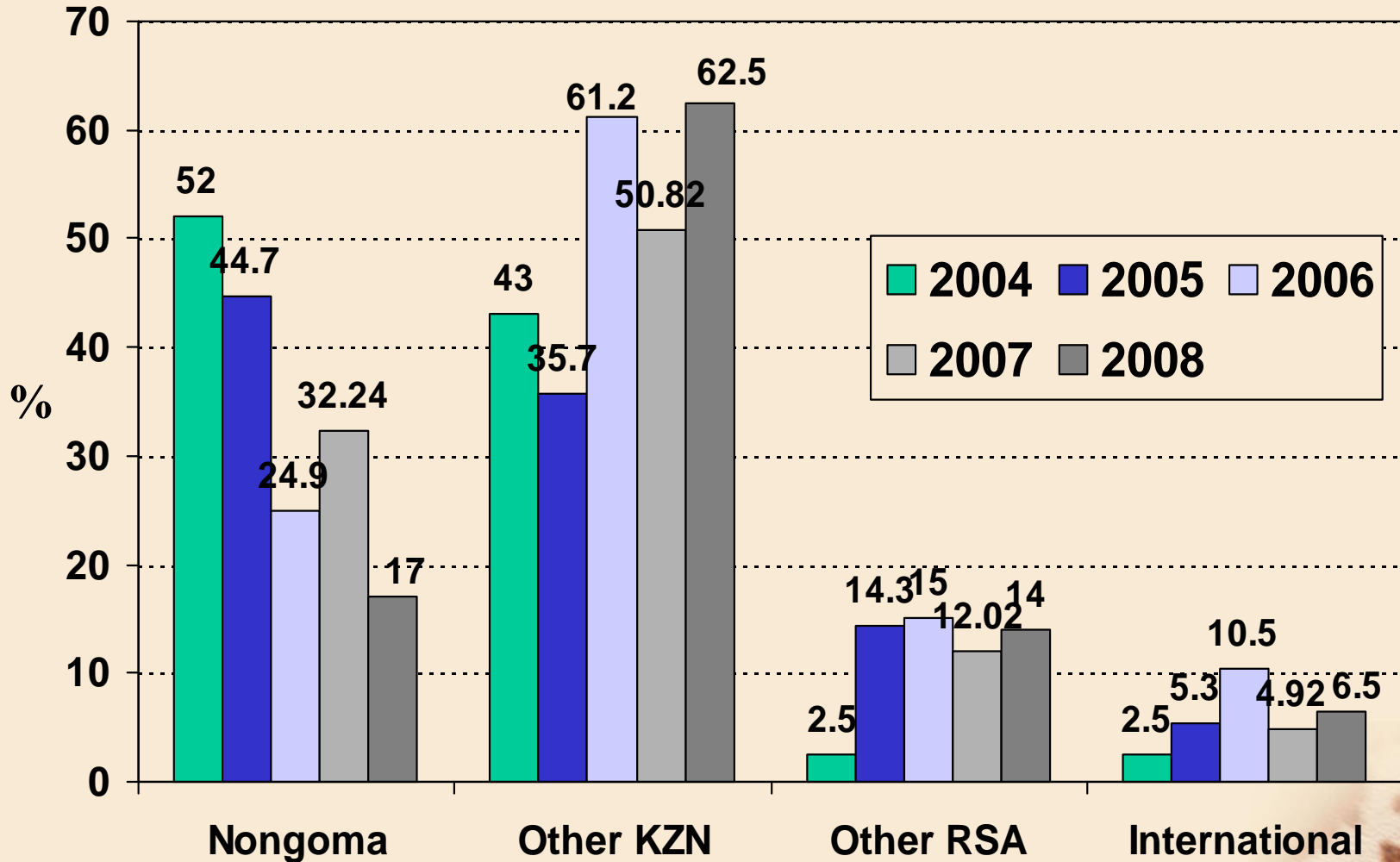
- 200 face-to-face interviews
- Respondents randomly selected
- Structured questionnaire
- Survey conducted on main day of event - Saturday

Visitor / Resident

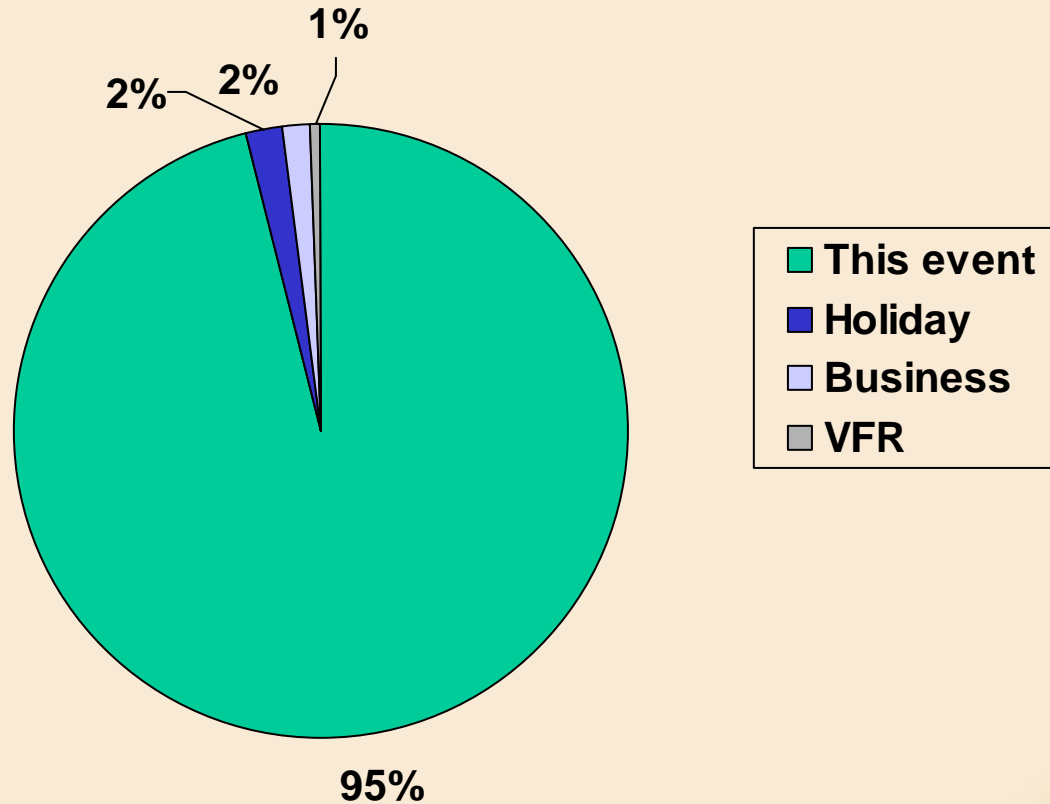


Comparing 2007 and 2008, a Z-test suggests that in 2008 there was a statistically significant increase in the number of visitors that attended the event.

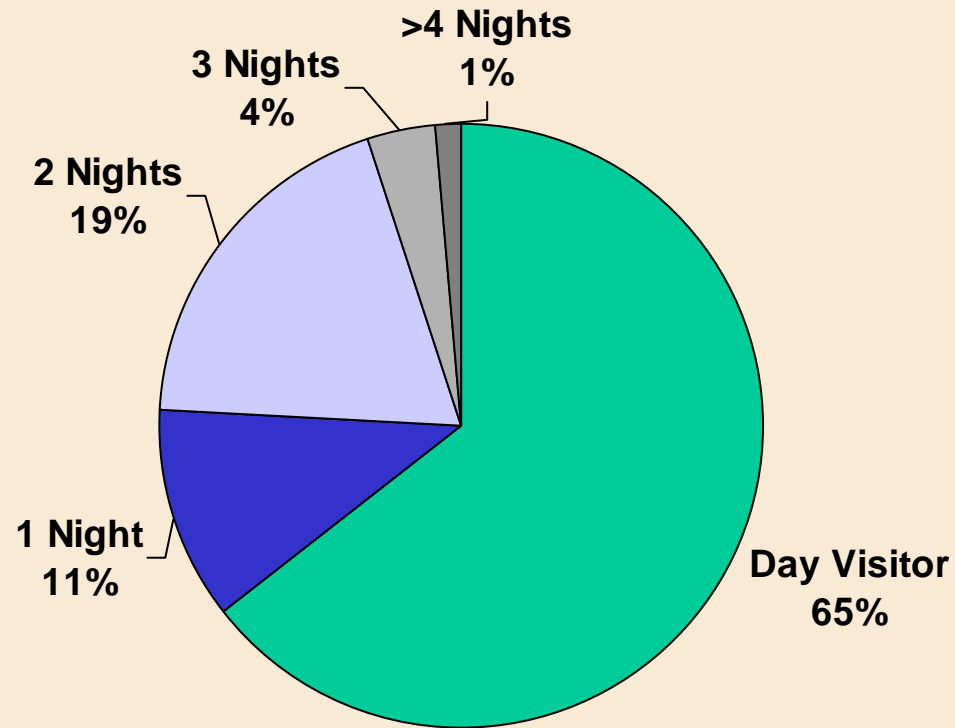
Nature of Spectators



Primary reason for visiting the area

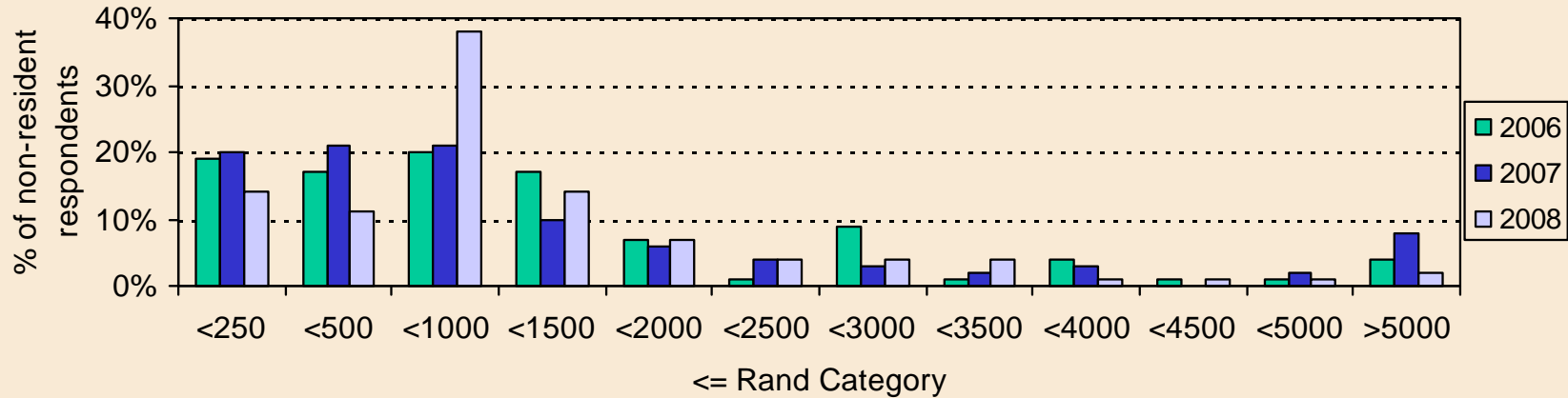


Length of stay:Visitors



Spend: Non-resident Respondents

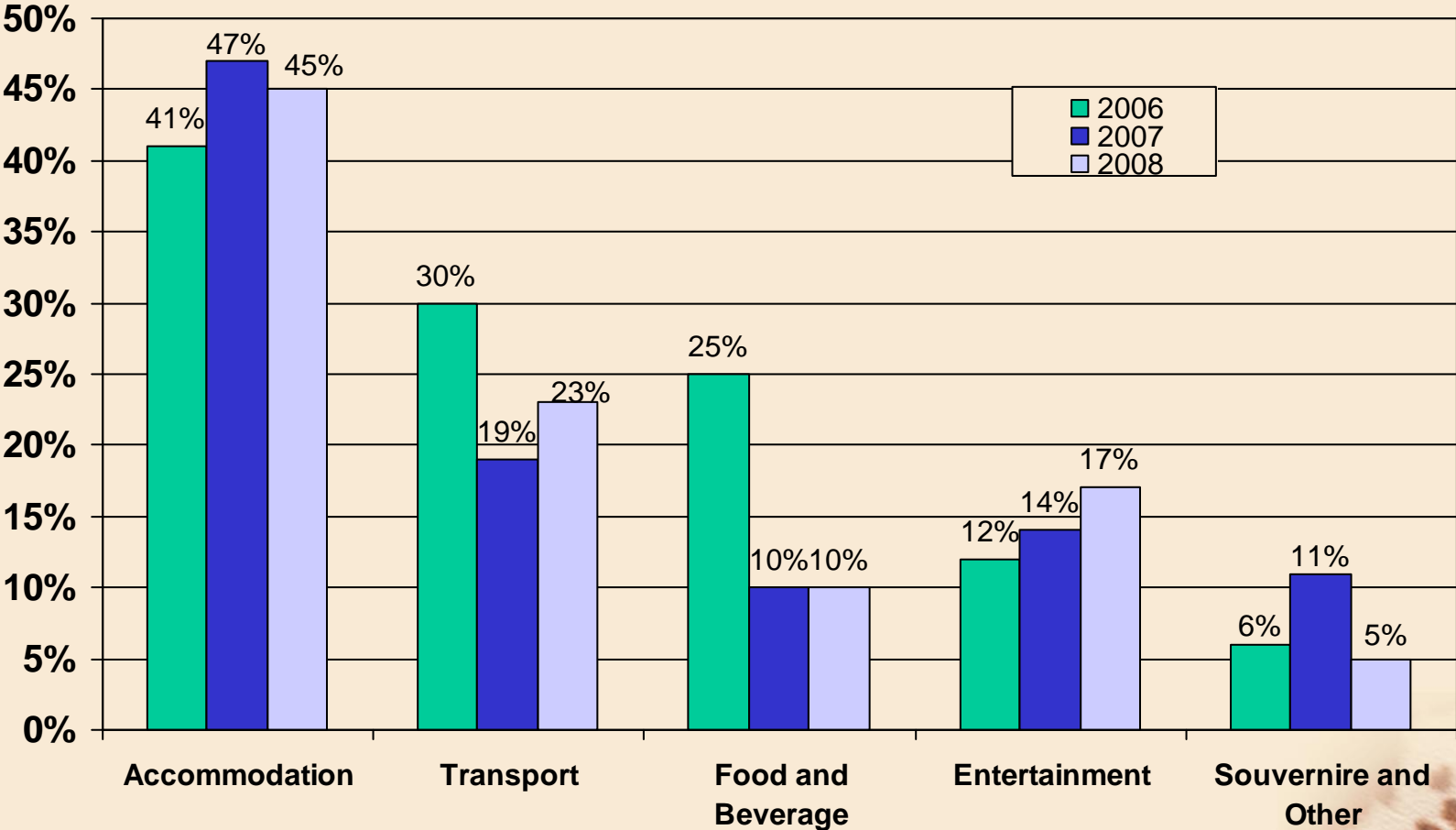
Spend per non-resident respondent



R	2006	2007	2008
<250	19%	20%	14%
<500	17%	21%	11%
<1000	20%	21%	38%
<1500	17%	10%	14%
<2000	7%	6%	7%
<2500	1%	4%	4%
<3000	9%	3%	4%
<3500	1%	2%	4%
<4000	4%	3%	1%
<4500	1%		1%
<5000	1%	2%	1%
>5000	4%	8%	2%



Nature of spend



Economic Impact

- 2005 Direct Spend \pm R6mn*
- 2005 Total Impact \pm R9mn

- 2006 Direct Spend \pm R11mn visitors only (\pm 6 060 non-resident spectators)
- 2006 Total Impact (multiplier of 1.42) \pm R16mn visitors only

- 2007 Direct Spend of \pm R5.67mn from an estimated 4000 spectators.(not including the maidens)
- 2007 Total impact (multiplier of 1.42) of \pm R7.97mn

* Reworked due to consultant error

Economic Impact (cont'd)

2008

Visitors (Non-resident respondents*)

Estimated N = 2490 (3000 x 83%)

Mean: R1452.40

Std Deviation: R2 513.70

Count: 154

Mode:R600

Median: R900

Std error at 95% level of confidence spend between R1 052.22 and R1 852.57

Estimated direct spend **not taking Std error** into account: R3,616,476.00

Estimated direct spend **taking Std error** of mean into account: At least R2,620,040.25 and as much as R4,612,911.75

Resident respondents*

Estimated N = 510 (3000 x 17%)

Mean: R147.90

Std Deviation: R143.30

Count: 26

Mode:R50

Median:R90

Std error at 95% level of confidence spend between R90.01 and R205.78.

Estimated direct spend **not taking Std error** into account: R75,429.00

Estimated direct spend **taking Std error** of mean into account: At least R45,910.15 and as much as R104,947.85

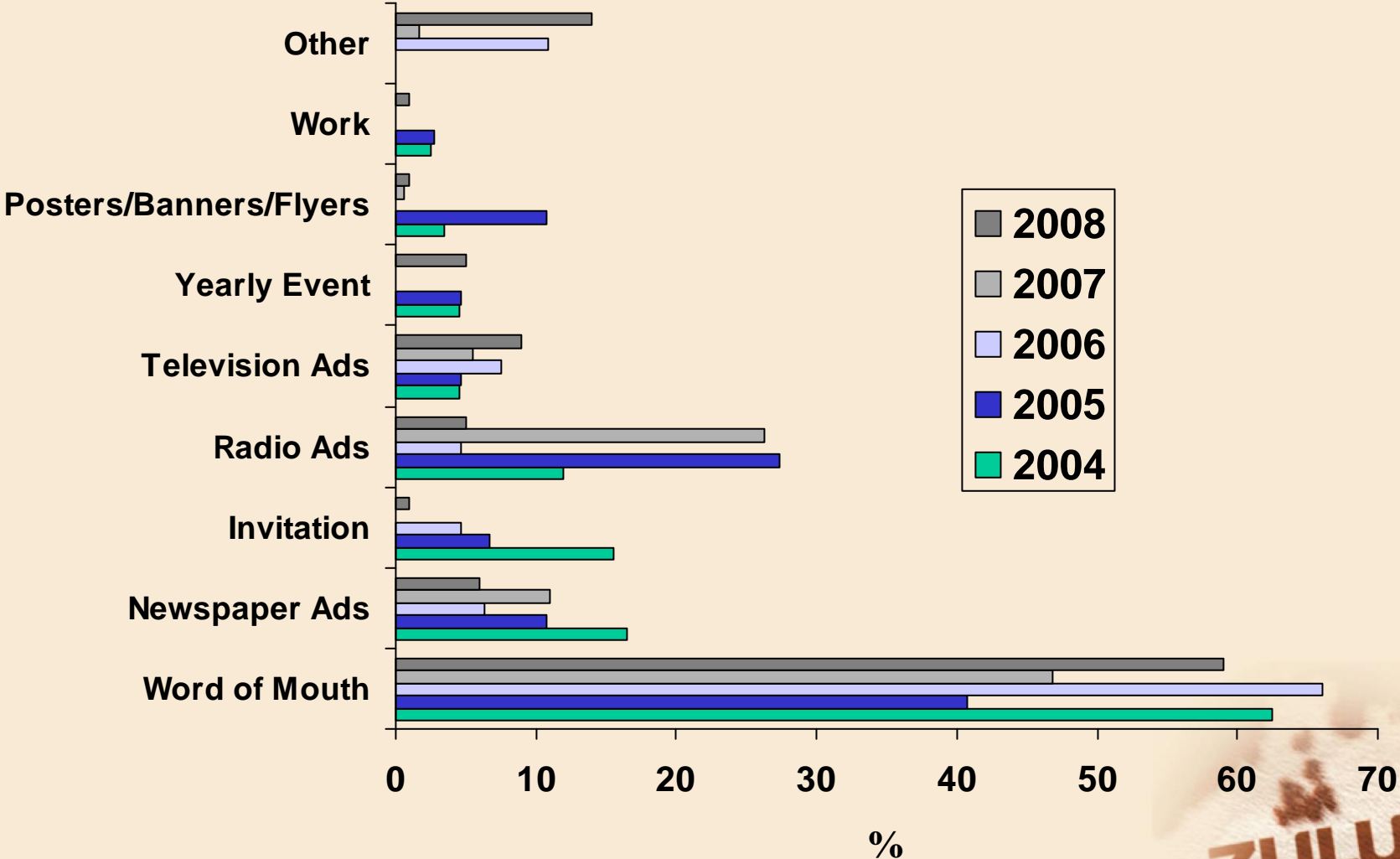
Estimated Total Direct impact: At least **R2,665,950.40** and as much as **R4,717,859.60**

Estimated Total Impact with a multiplier of 1.42: At least **R3,785,649.57** and as much as **R6,699,360.63**.

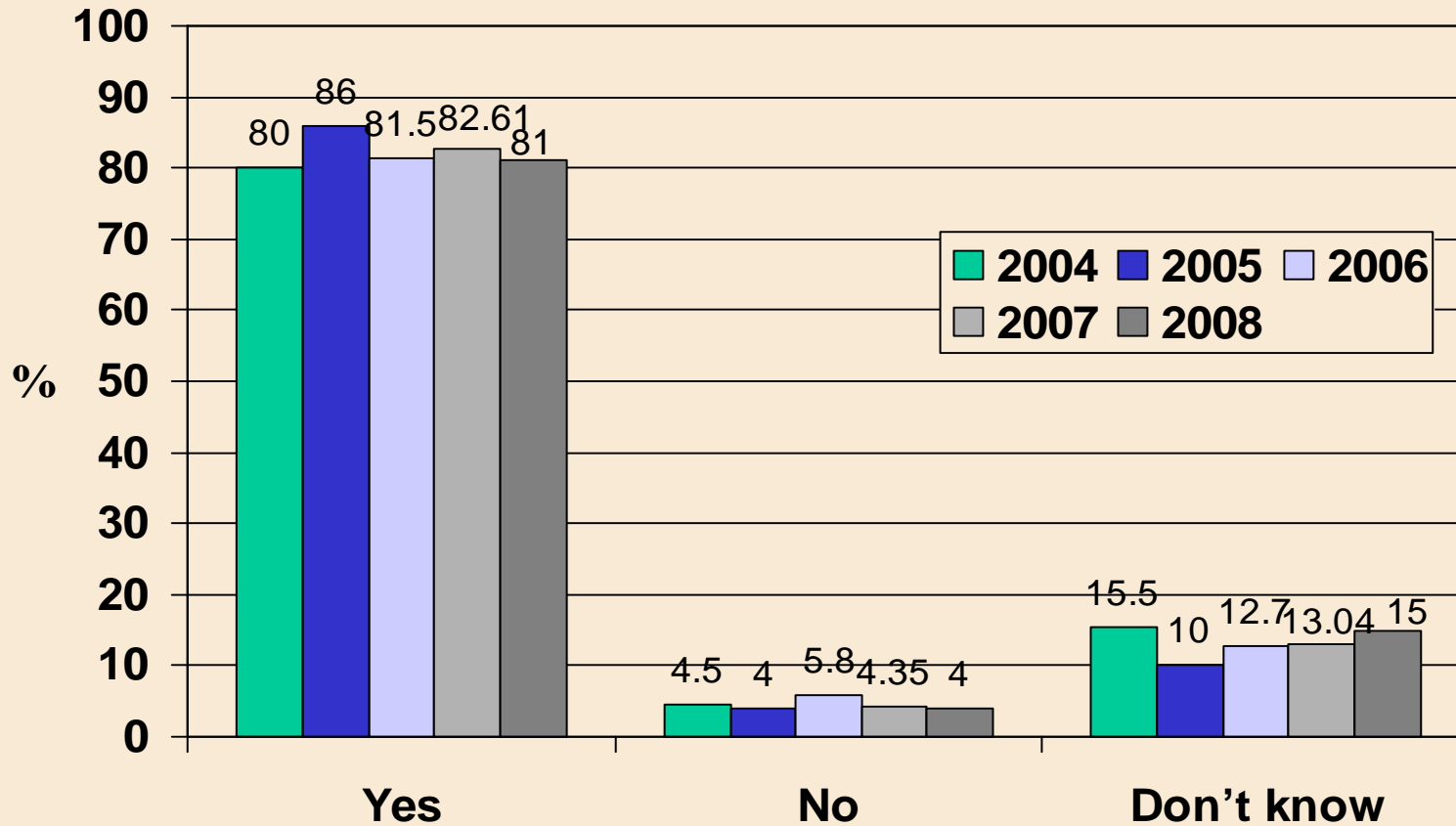
*Excludes the maidens



Factors that influenced decision to attend

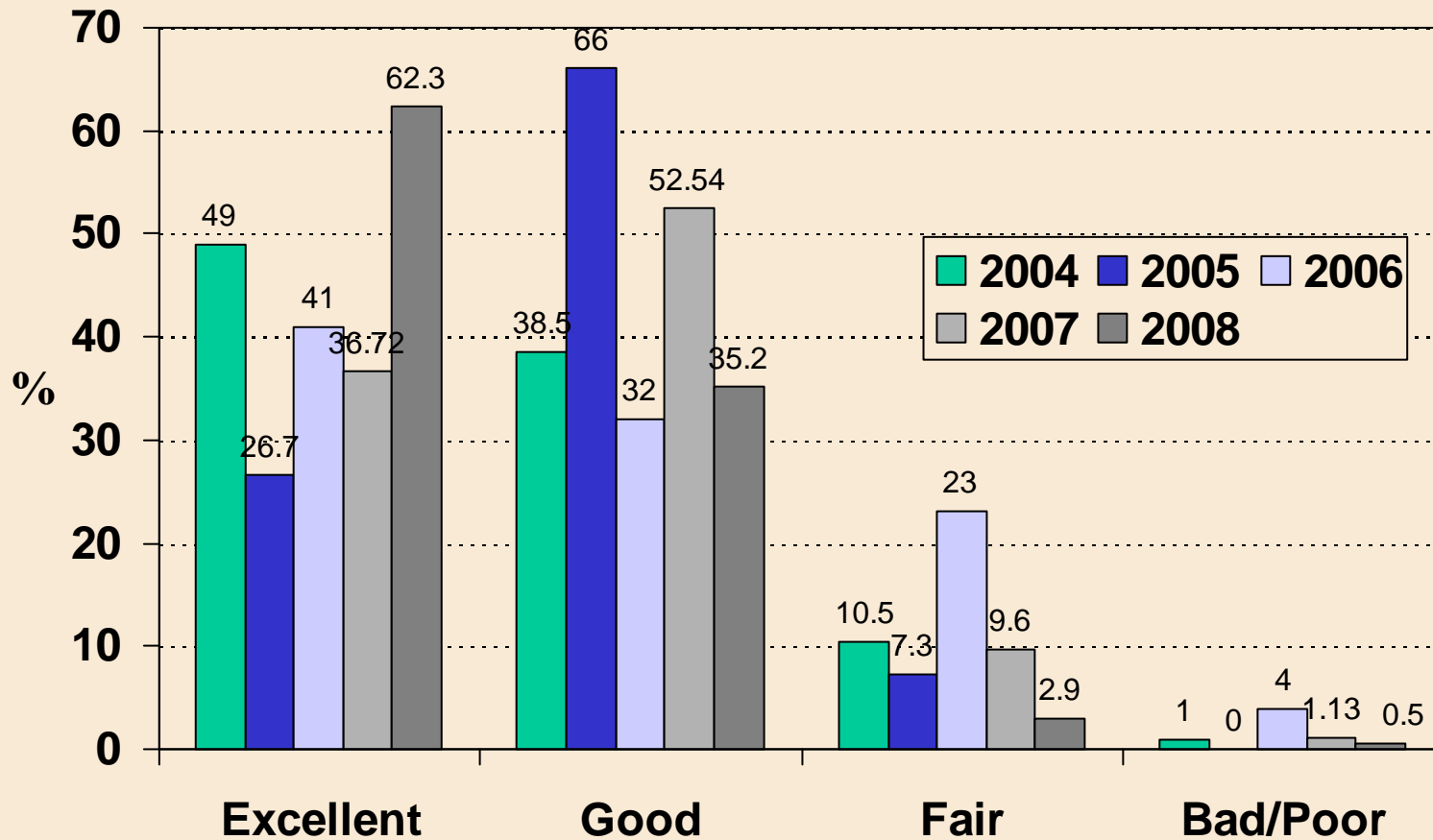


Future Attendance



Comparing 2007 and 2008, a Z-test suggested that there was not a statistically significant difference in those that indicated that yes, they would attend future events.

Perception of Event

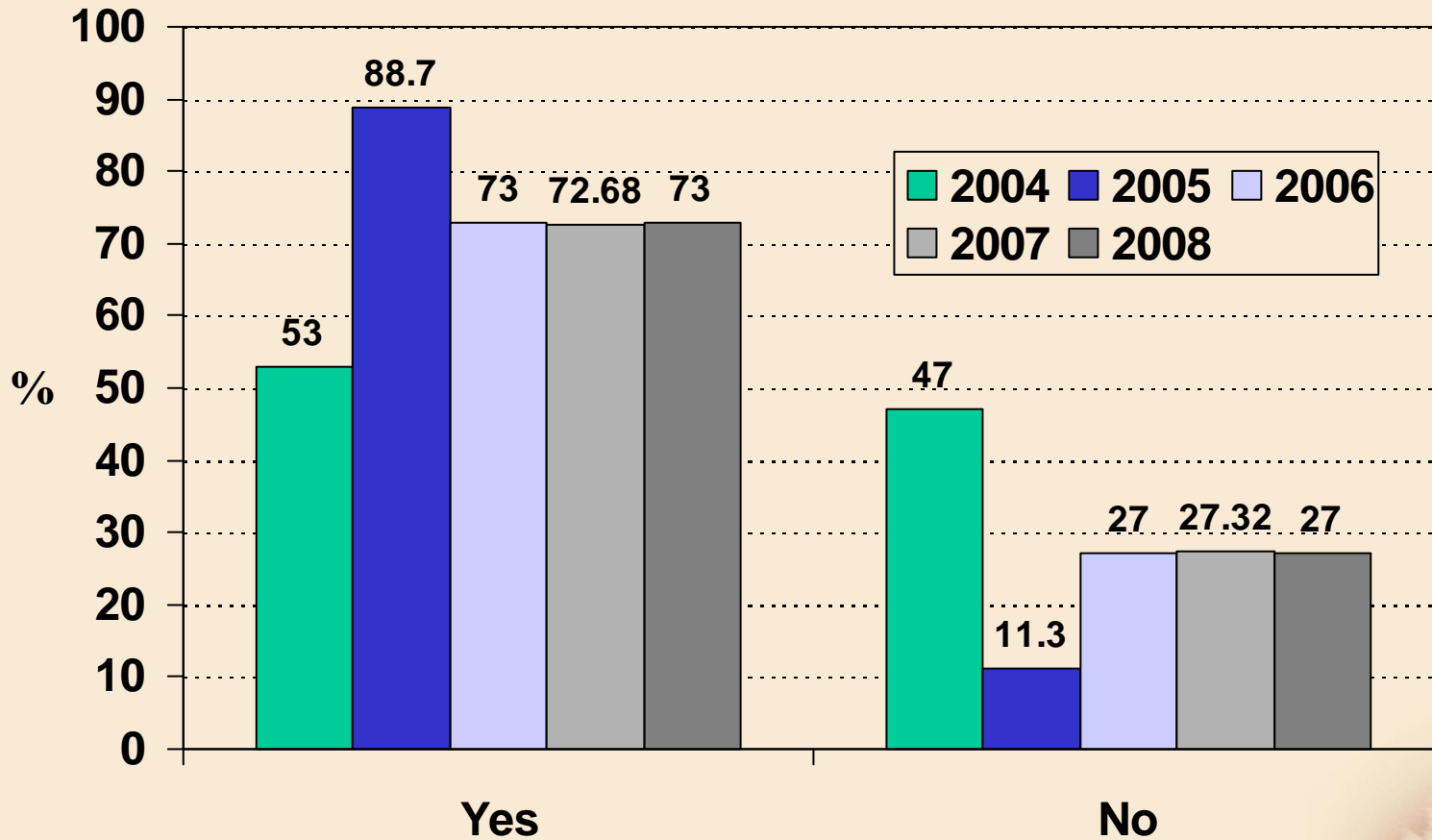


Comparing 2007 and 2008, the Z-test suggests that there was a statistically significant difference in the rating of the event in terms of the categories.

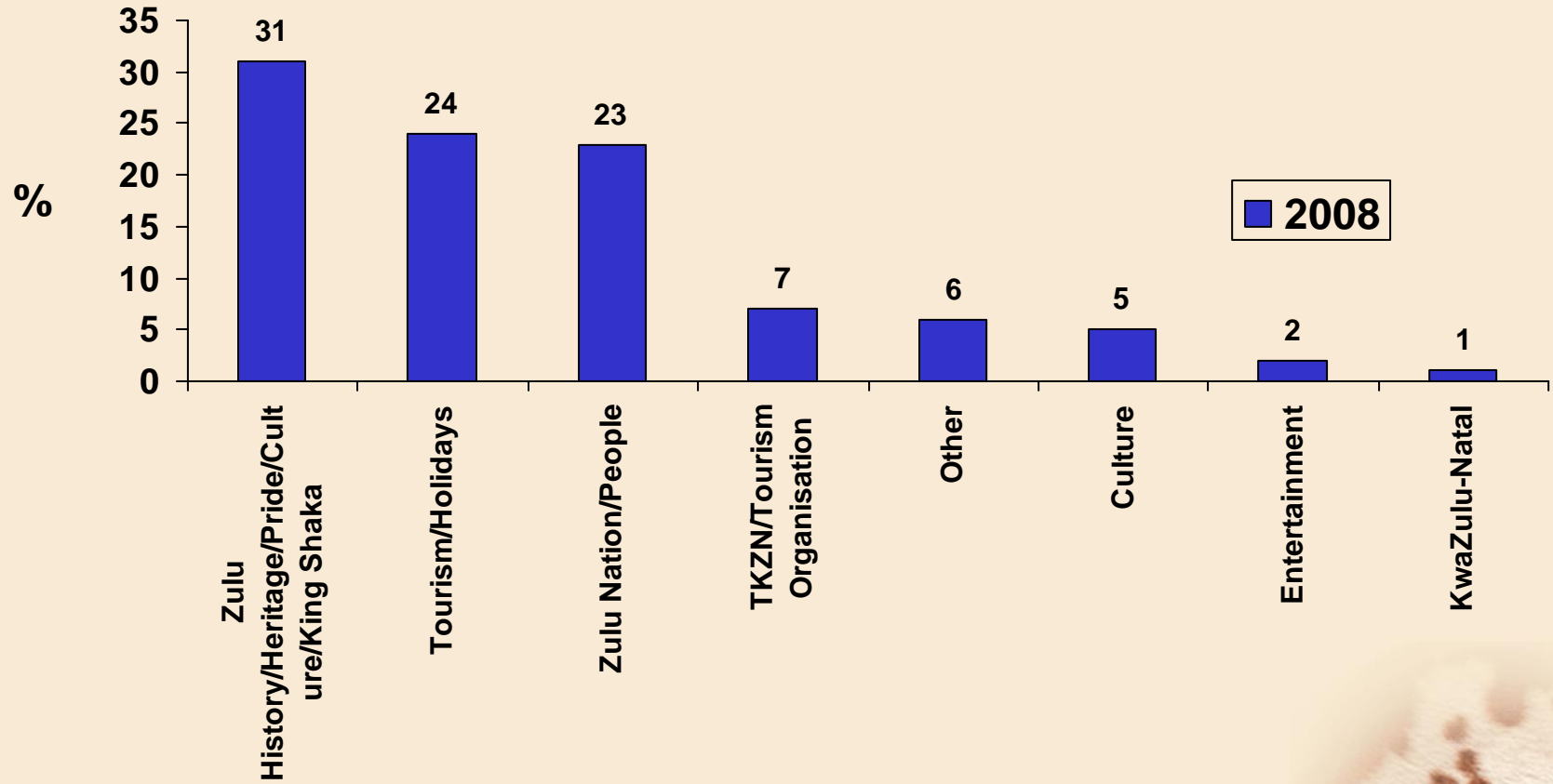
Suggested Improvements

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

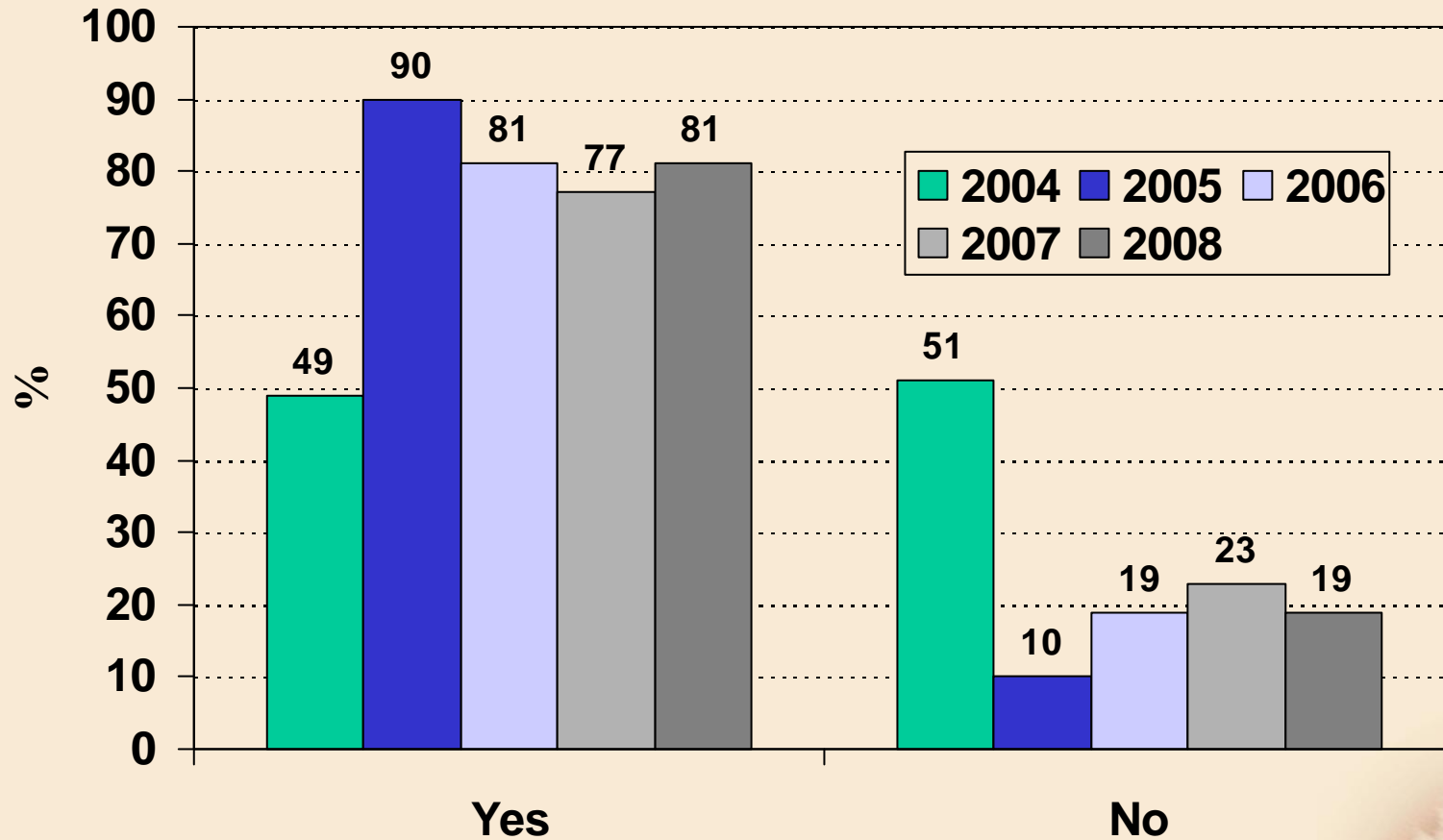
Familiar with Zulu Kingdom Slogan



Slogan Association



Familiar with Zulu Kingdom Logo



Conclusion/Main Findings

- There was a 15% increase in the number of visitors from 2007 to 2008 with a 14% decrease in locals. A Z-test indicated that there was indeed a statistically significant increase in the number of visitors.
- 2008 saw a slight increase in international and SA visitor numbers.
- The primary reason for being in the area was mainly the Reed Dance itself signaling popularity of the event.
- Visitors mainly attended as day visitors (65%) with only 24% of respondents staying for two nights or more.
- Accommodation and transport continue to demand the bulk of visitor spend
- Word of mouth continues to be the main factor in influencing decision to attend the event.
- A majority of respondents will attend in future suggesting their satisfaction with the event .
- 62% of respondents were of the view that the event was excellent. An increase of 25.5% from 2007, with a Z-Test suggesting a statistically significance difference between 2007 and 2008 ratings.
- In terms of familiarity with the Zulu Kingdom slogan and looking at 2006-2008, there does not seem to be any improvement. The responses appear to be constant.
- In terms of slogan association, the respondents continue to make an association with Zulu history, Kings and Culture/Heritage.

Recommendations

Flowing from the main findings, the following recommendations are made:

- As accommodation and transport demand the bulk of visitor spend, there is an opportunity for operators to develop packages to include transport and accommodation for the Reed dance event.
- The TKZN marketing division to work on increasing the association of the “Zulu Kingdom” slogan with a holiday destination.
- The issue of additional ablution facilities and shelter still came up in 2008. As such, the organizers are advised to look at increasing them.