

Splashy Fen 2017

Event Impact Assessment

Top Line Summary Report



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Positive Highlights



- 94% of the respondents were VISITORS to the region of the event.
- 99% of the respondents had either a 'excellent' (66%) or 'good' (33%) experience at the event.
- 98% of the respondents were satisfied with the information provided regarding the event.
- 87% of the respondents plan to attend the event again in future.
- 83% did NOT experience any problems at the event.
- 99% would recommend the event to their family/friends.

Positive Highlights



- 99% of the respondents would recommend KZN as a tourism destination to their friends and family.
- 89% of the respondents stayed in the area for 3 nights or more.
- The economic impact of the event was estimated to be **between R35,1 million and R45,5 million**. This figure had **increased by more than 50%** when compared with 2012, despite the total attendance being less in 2017.

Methodology



- Face to face surveys with a probability sample of **250** respondents.
- Surveys were conducted on Friday the 14th of April, Saturday the 15th of April, and Sunday the 16th of April.
- Respondents were systematically, and randomly, selected throughout the three days of the festival.
- Secondary data has also been obtained from the event organizers.

Methodology (cont'd.)



Representative Sampling

A **small quantity of something** such as customers, data, people, products, or materials, **whose characteristics represent** (as accurately as possible) the **entire batch, lot, population, or universe**.

Two advantages

1. Saves **time** (not enough time to interview 1 000 people during an event)
2. Saves **money** (fieldworkers are paid per survey/questionnaire –
E.g. 1 000 surveys @ R25 = R25 000)

National Department of Tourism: Accepted Standards

10 people in a room – interview all 10.

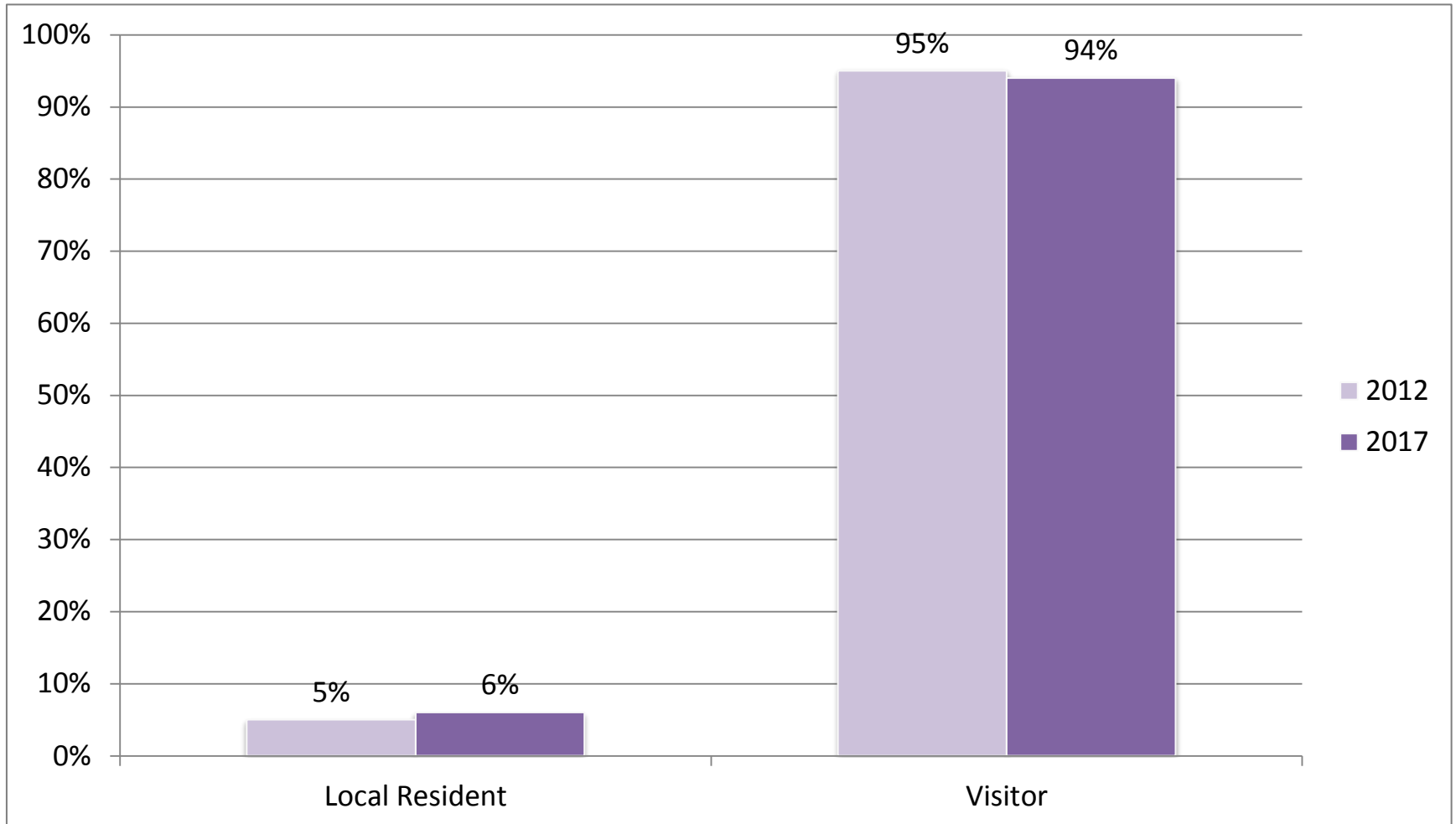
100 people in a room – safe with 40-50 surveys.

1 000 people in a room – safe with 100 surveys.

10 000 people in a room – safe with 150-200 surveys.

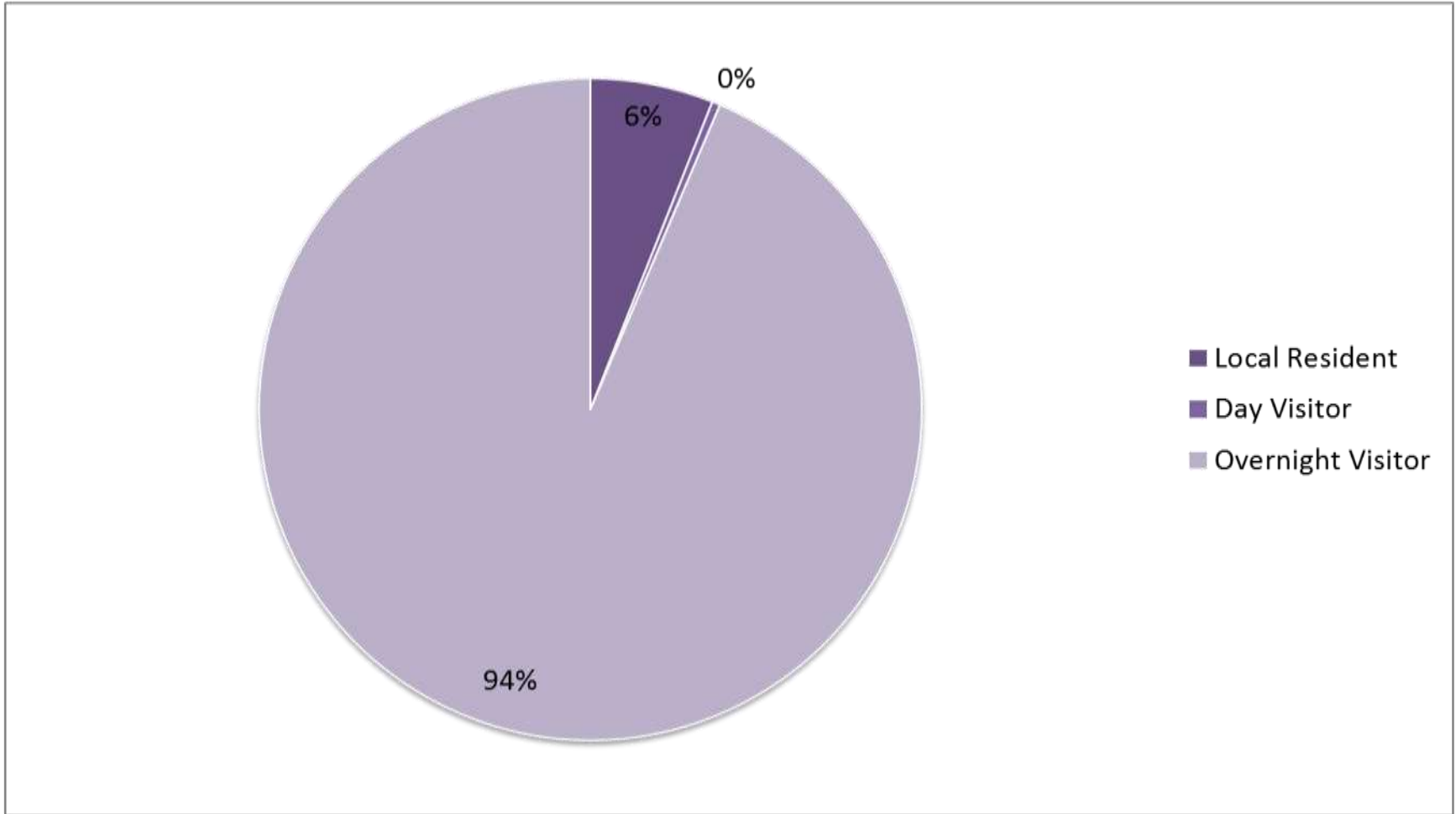
i.e. If the sample size grows to more than 400 (in relation to the population), any addition to the sample size **becomes statistically irrelevant**.

Nature of Respondents



It is extremely positive to note that, once again over 90% (94%) of the respondents were visitors to the area in which the event was taking place. This seems to have had a positive influence on the overall economic impact.

Nature of Respondents (cont'd.)



Following on from the previous slide, in 2017 all of the visitors were *overnight visitors* while only a small minority (0.4%) were considered as *day visitors* to the Underberg region.

Nature of Respondents: Breakdown



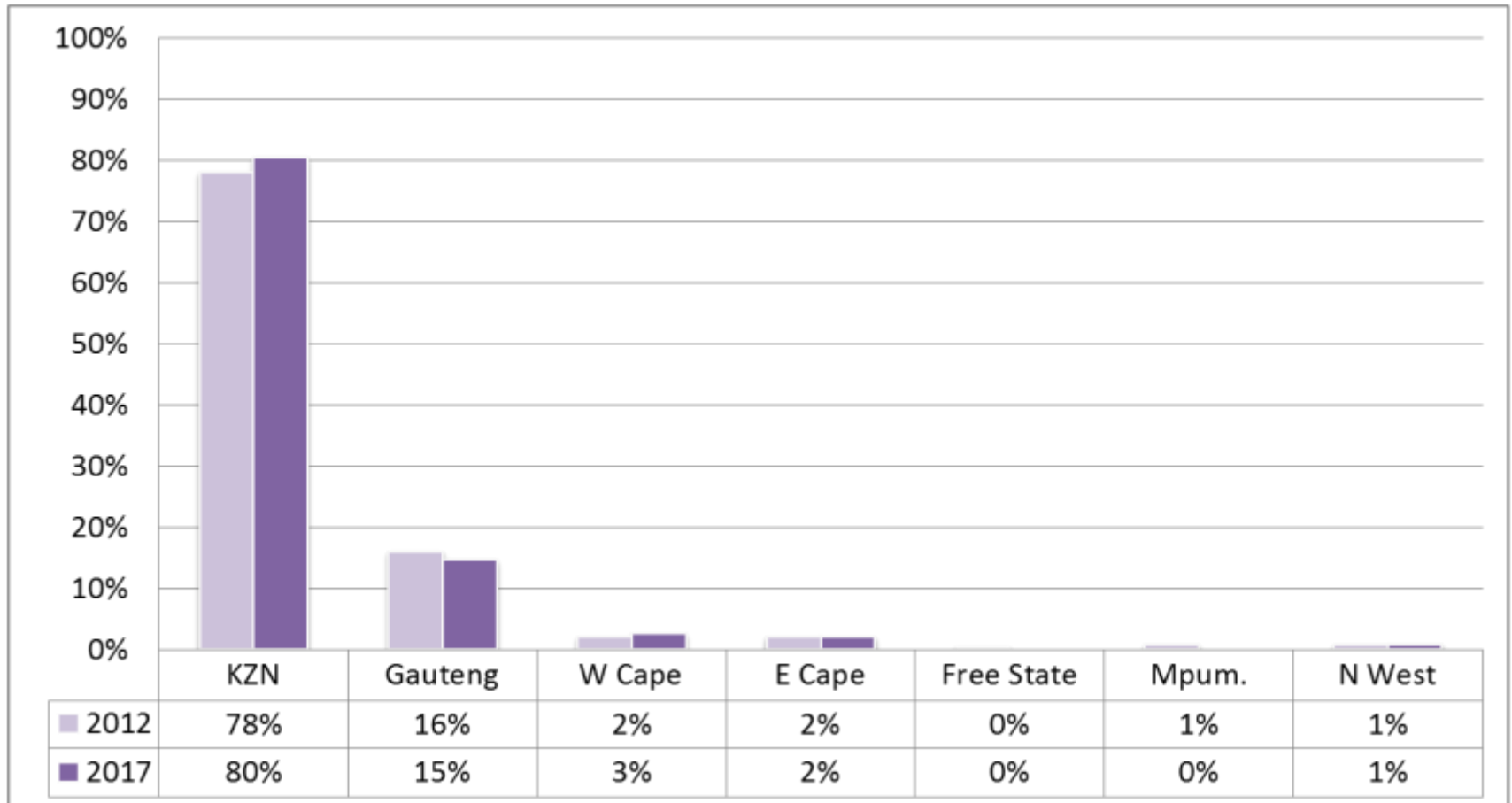
2012	Sample	%	Total Attendance*
Local Residents	14	5	360
Day Visitors	0	0	0
Overnight Visitors	272	95	6 837
TOTAL	286	100	7 197

2017	Sample	%	Total Attendance*
Local Residents	15	6,0	415
Day Visitors	1	0,4	28
Overnight Visitors	234	93,6	6 478
TOTAL	250	100	6 921

The table outlines the breakdown of the **estimated** numbers that attended the event. The breakdown of the numbers is based on the proportion of local residents and visitors, which has been obtained from the surveys.

*It is important to note that the total attendance was estimated to be **6 921** (provided by the organizers).

Province of Origin: All Respondents



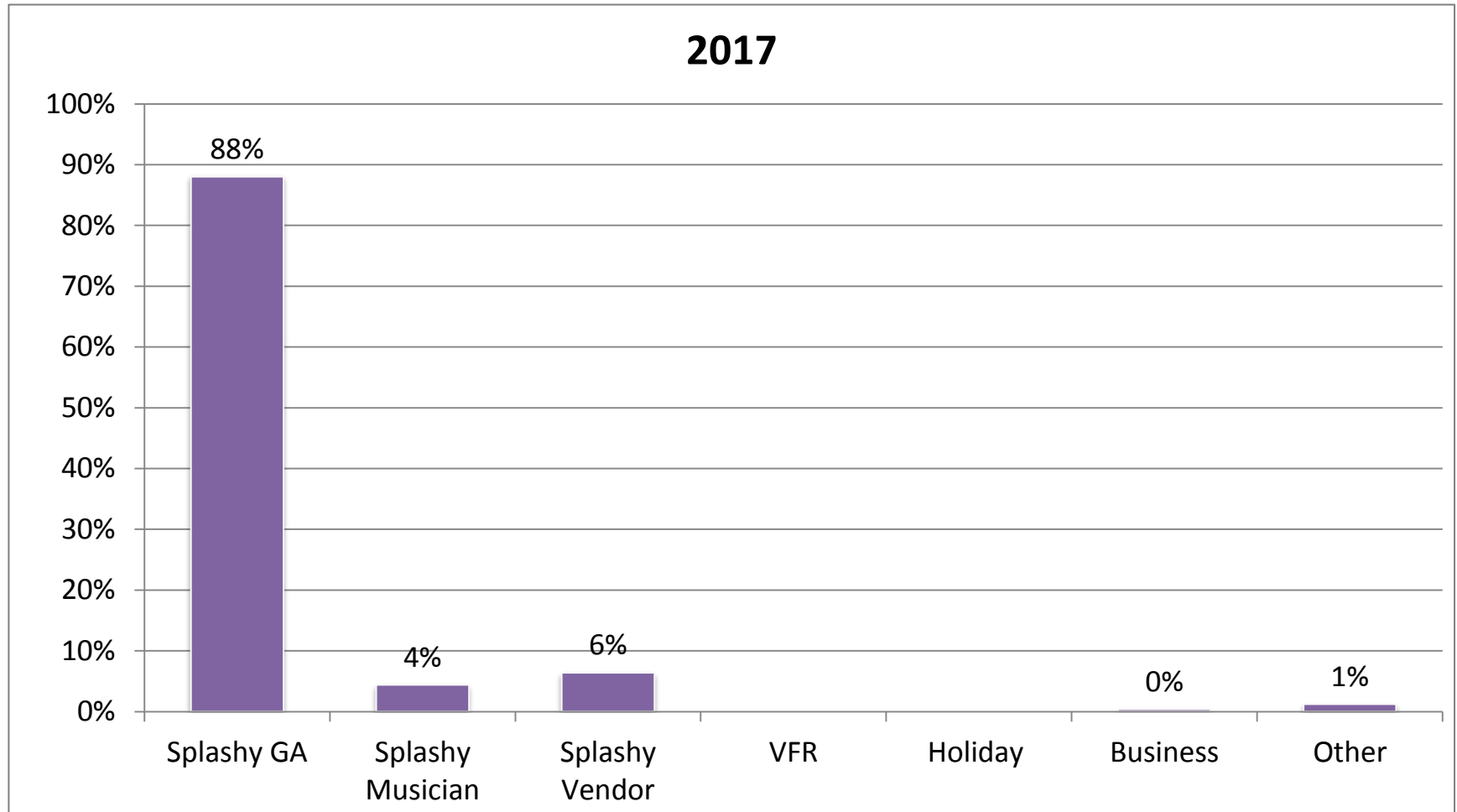
In 2017, most of the respondents were from KZN (80%), while 15% were from Gauteng, 3% from the Western Cape, 2% from the Eastern Cape, and 1% from the North West province. It is not surprising that KZN's top two domestic source markets (KZN and Gauteng) had the highest number of respondents.

International Respondents



Country	2012 (n =)	2017 (n =)
Belgium	-	1
Canada	-	1
Finland	-	1
France	1	-
Germany	2	-
Iceland	-	1
Ireland	1	2
Namibia	1	-
UK	4	2
USA	1	-

Purpose of Visit

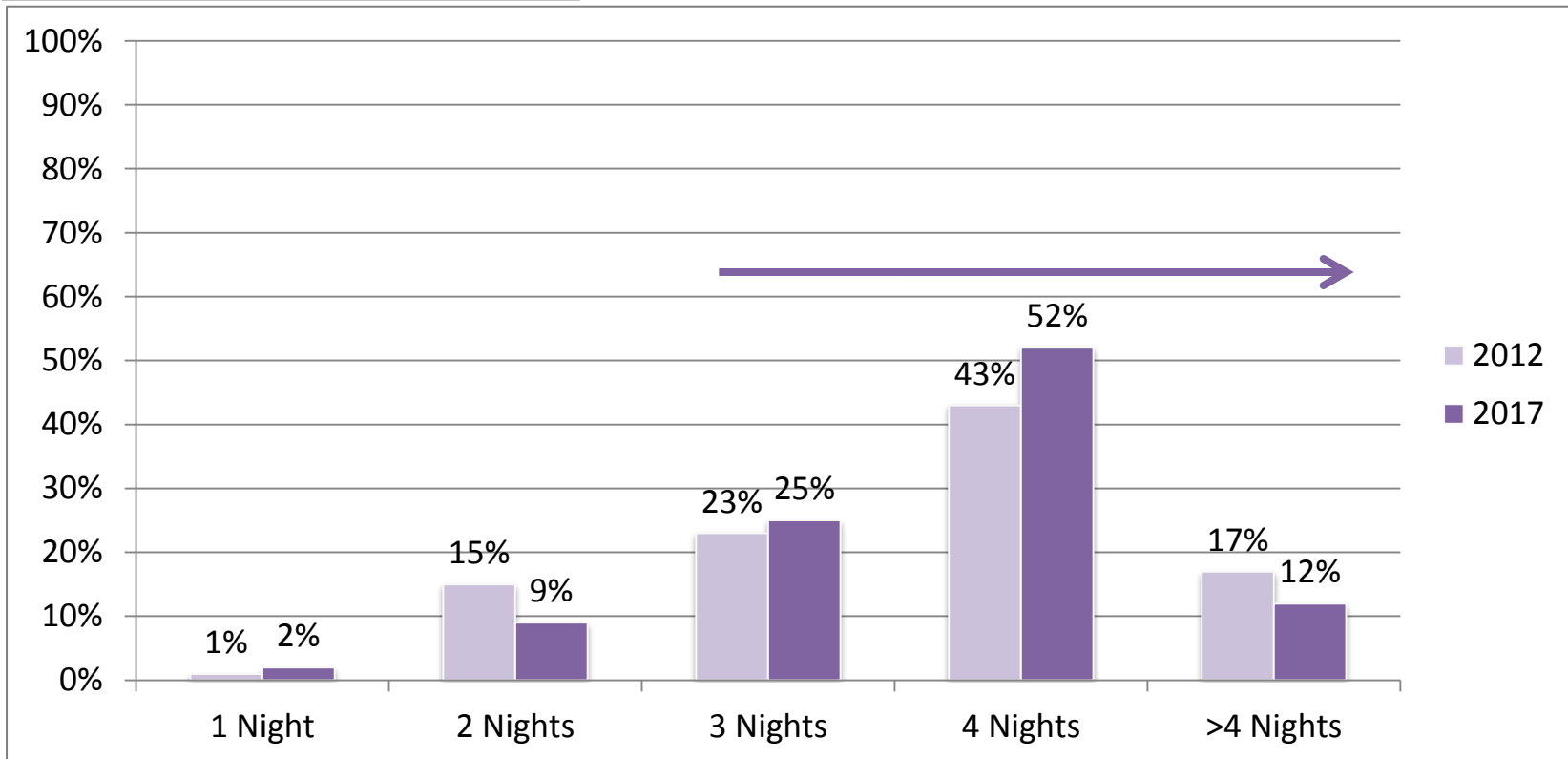


Almost all (99%) of the respondents were in Underberg, at the time of the event, primarily for Splashy Fen. Of these, 88% were 'General Access (GA, i.e. festival goers), 6% were 'Vendors', and 4% were 'musicians'. The 'Other' category included those who were part of the media teams.

Length of Stay: Overnight Visitors

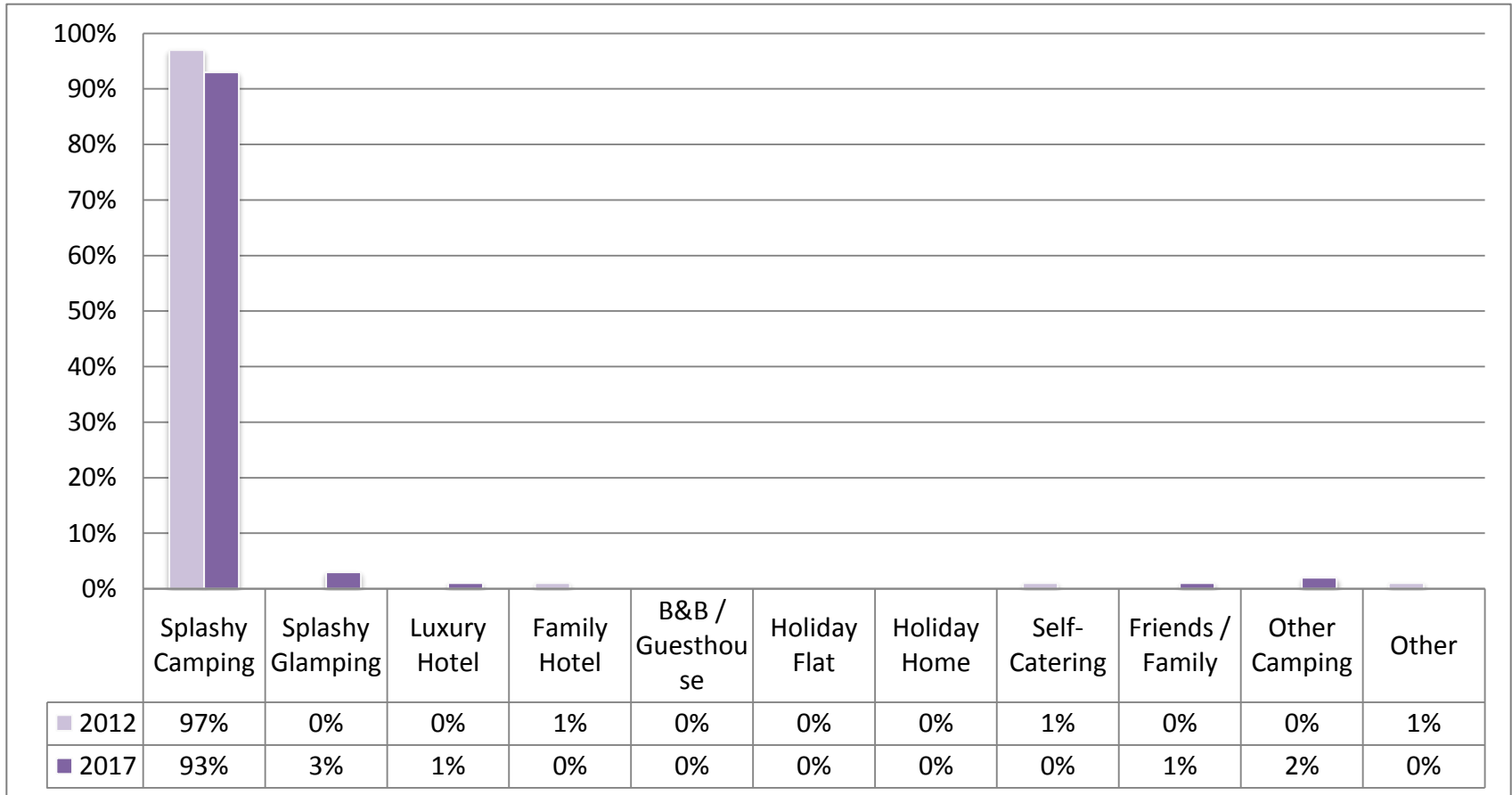


Average Stay: 3.5 Nights



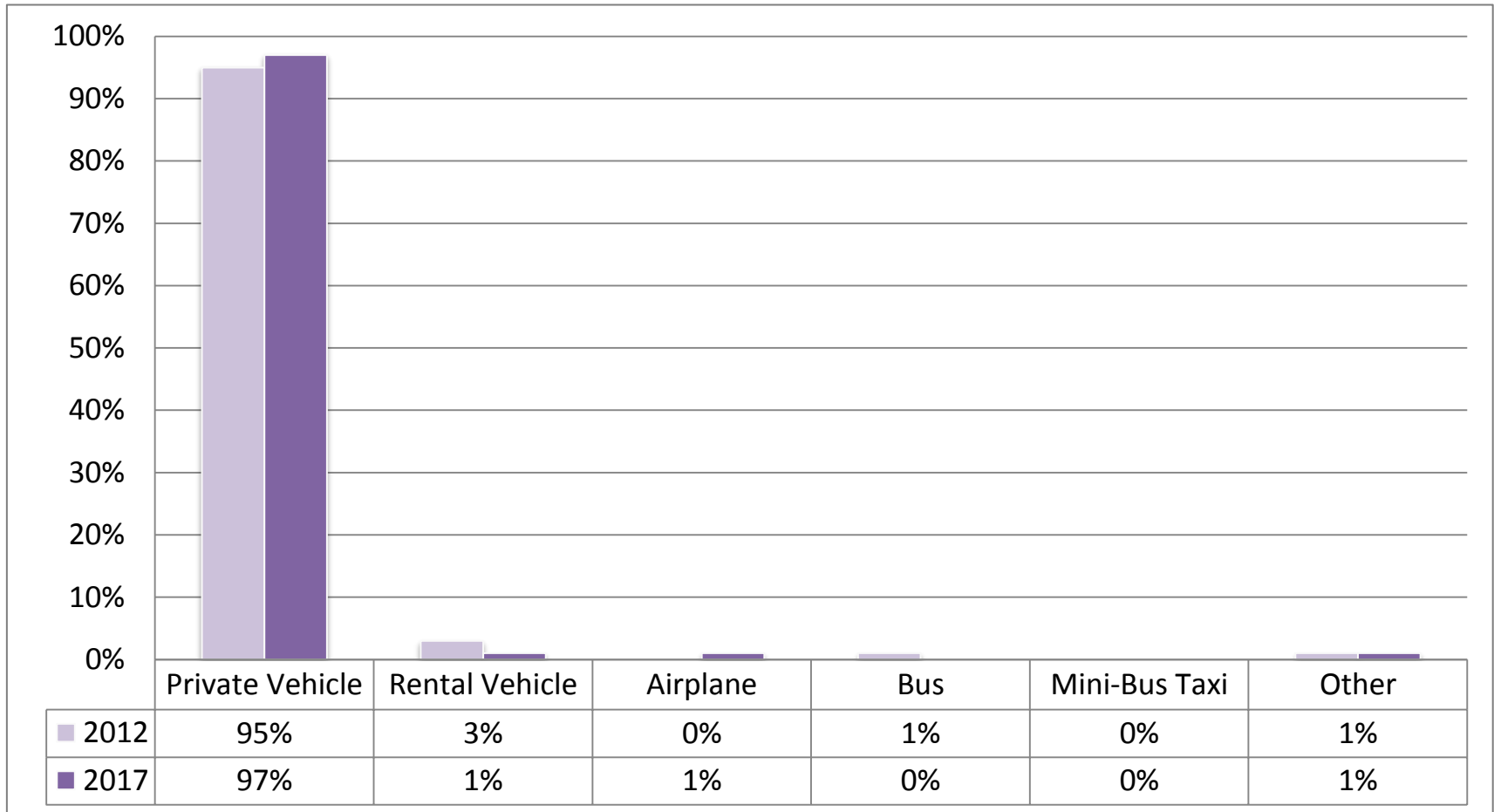
It is evident from the graph above that the majority of the respondents (52%) stayed for 4 nights – which is the general time frame of the festival (13 – 17 April). Following this, 25% of the respondents stayed for 3 nights which seems to be a common trend whereby people leave to be able to have one day of the Easter Weekend at home. There was an increase in those who stayed for 3 and 4 nights and a decrease in those who stayed for more than 4 nights, when looking back at the data from 2012.

Accommodation: Overnight Visitors



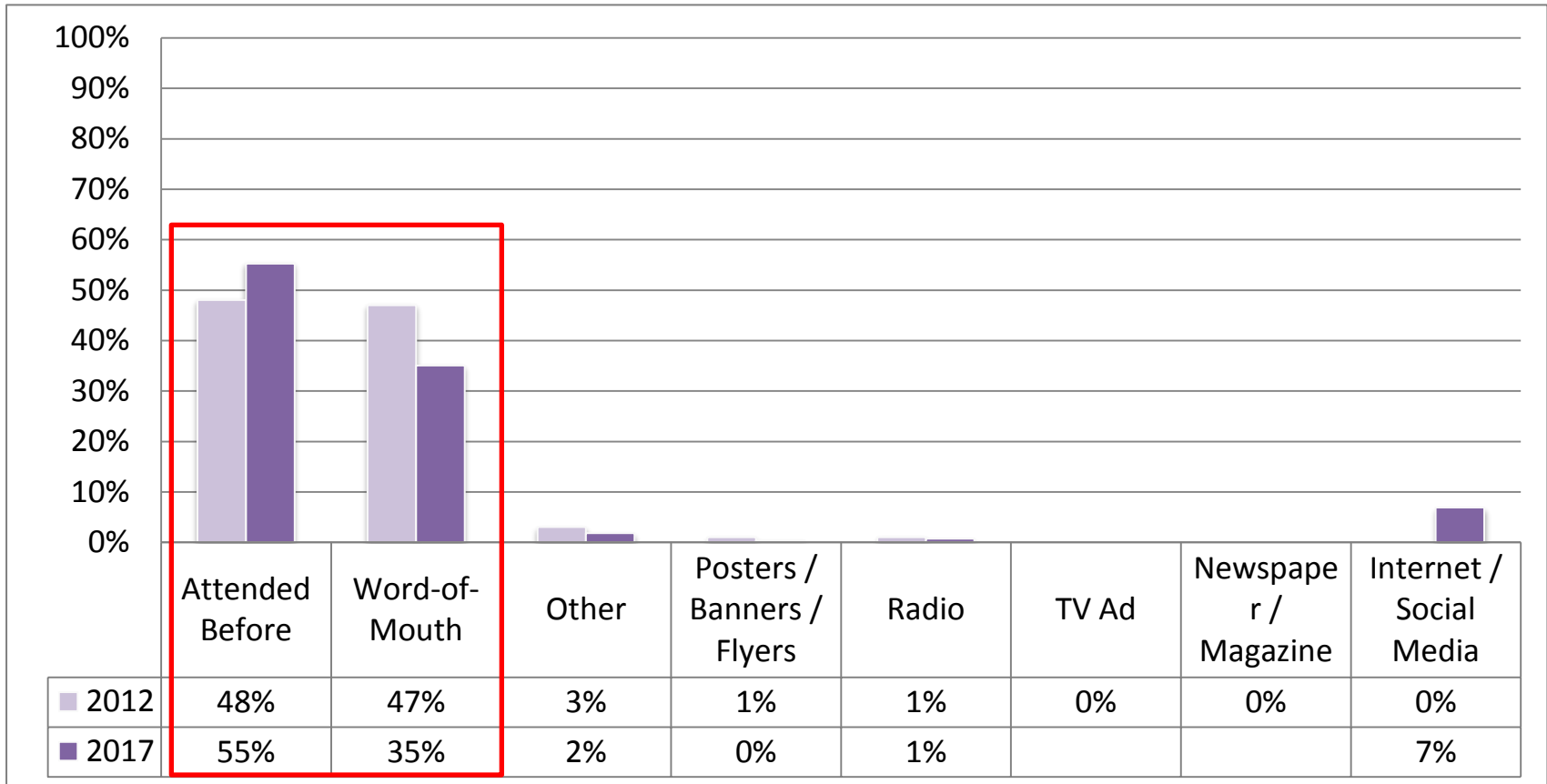
It is evident from the graph that almost all of the respondents (96%) were camping at the event (either in their own tents or in the 'Glamping' village, while 4% stayed in accommodation establishments outside of the festival. **Note:** 'Glamping' is a term used for the tent village that is set up for those staying in it and proper beds with bedding are included in the tent. 'Glamping' = "Glamorous Camping".

Transport to Event



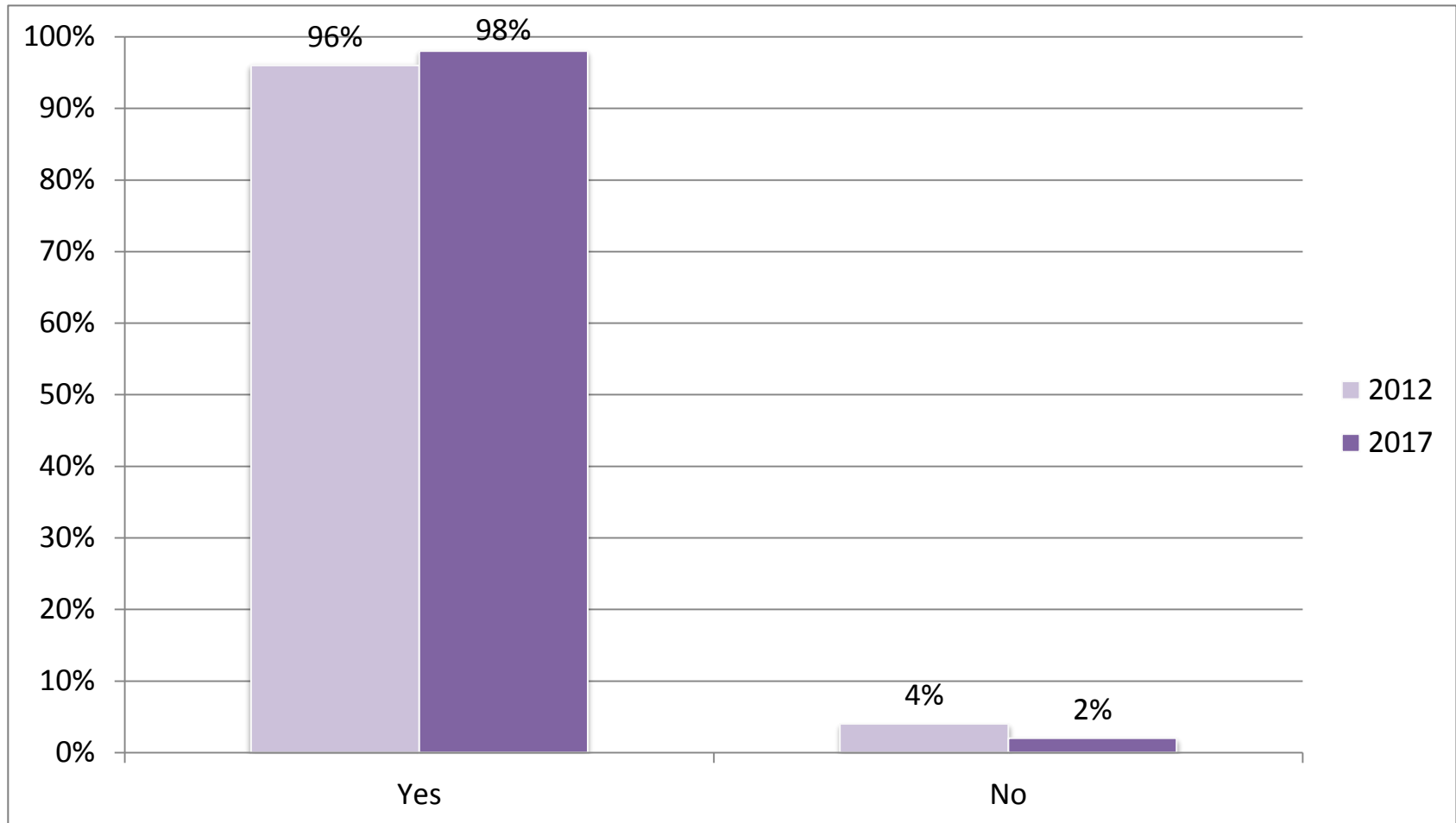
The majority of the respondents travelled to the event in 'Private Vehicles' (97%). This is expected as the event takes place "off the beaten track" and is only accessible by vehicles. Also, the festival goers need to bring a lot of camping equipment for the event and thus the vehicles are the best to transport these to the event.

How did you hear about Splashy?



It is positive to note that 55% of the respondents were heard about or were influenced to attend the event due to their previous attendance. In addition to this, 35% of the respondents attended the event due to 'Word-of-Mouth'. That means 90% of the respondents attended the event without any influence from any traditional advertising means and thus, the event's reputation was enough to influence people to attend. It is also worth noting that 7% were aware of the event from 'Internet/Social Media'.

Information Satisfaction



It is extremely positive to note that 98% of the respondents were satisfied with the information that was provided regarding the event. Thus, this suggests that the overall organisation of the event was deemed to be very good.

Marketing Improvement Suggestions

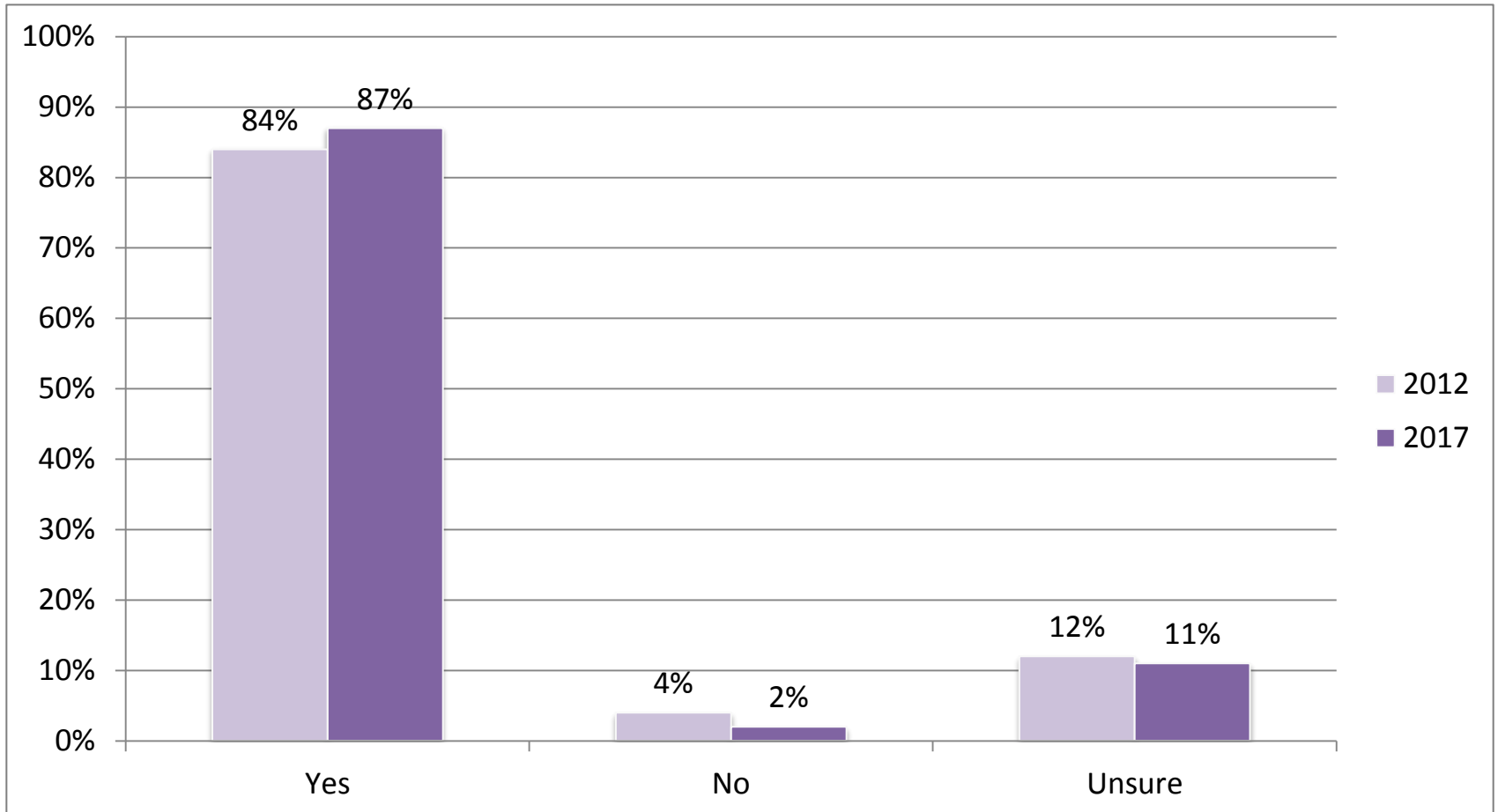


It must be noted that the vast majority of the respondents indicated that the event was already **well marketed**.

However, some the following suggestions were made by the **respondents**:

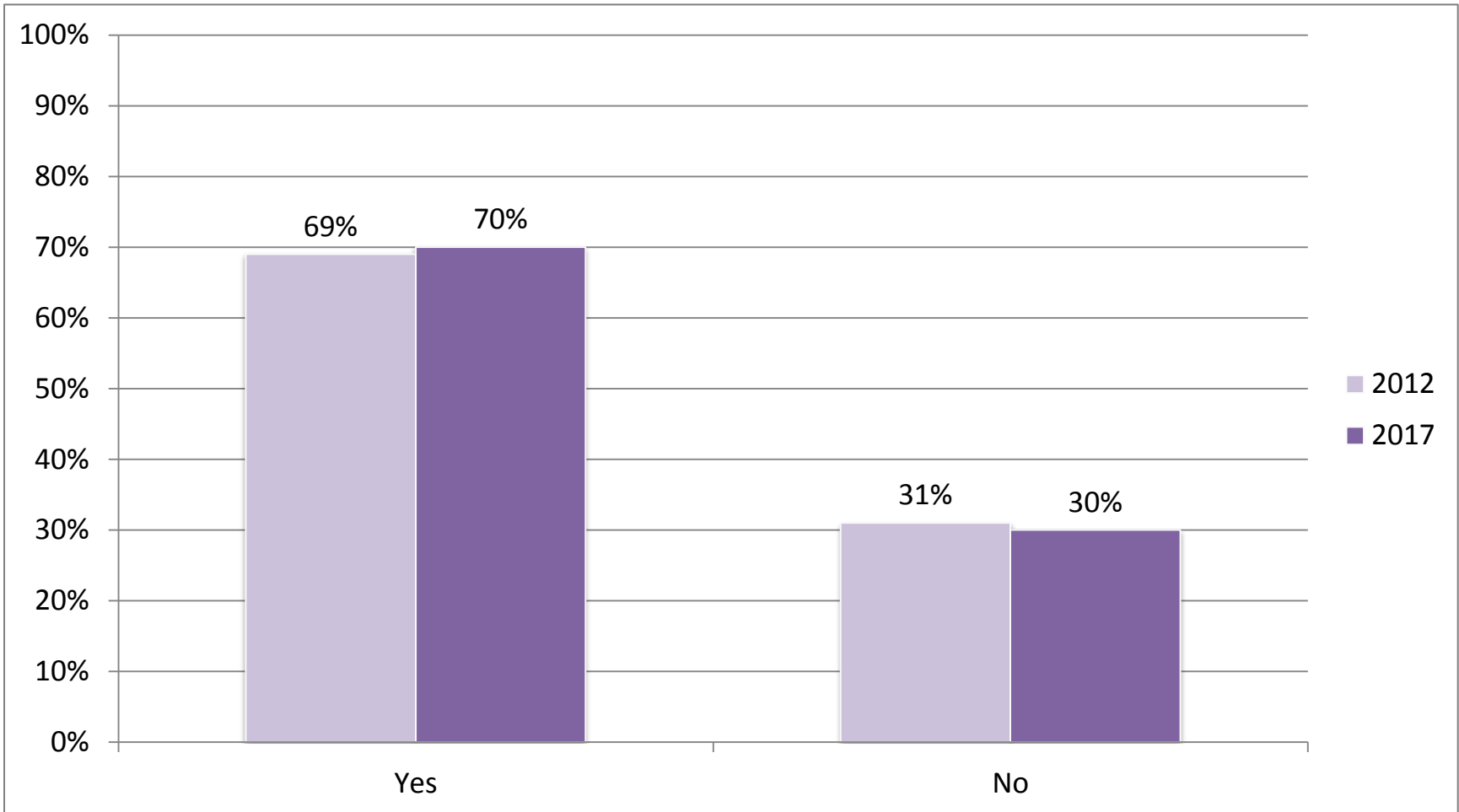
- More radio coverage
- Marketing should cover a wider audience and should be spread into other provinces
- More adverts in newspapers
- Create TV ads
- Increase advertising across all social media platforms, other than Facebook, such as Instagram and Twitter, and even YouTube.

Future Attendance



It is positive to note that 87% of the respondents said that they will attend the event again in the future. This is a positive aspect in terms of the overall growth of the event. It is possible that a further 11% may also attend the event in the future.

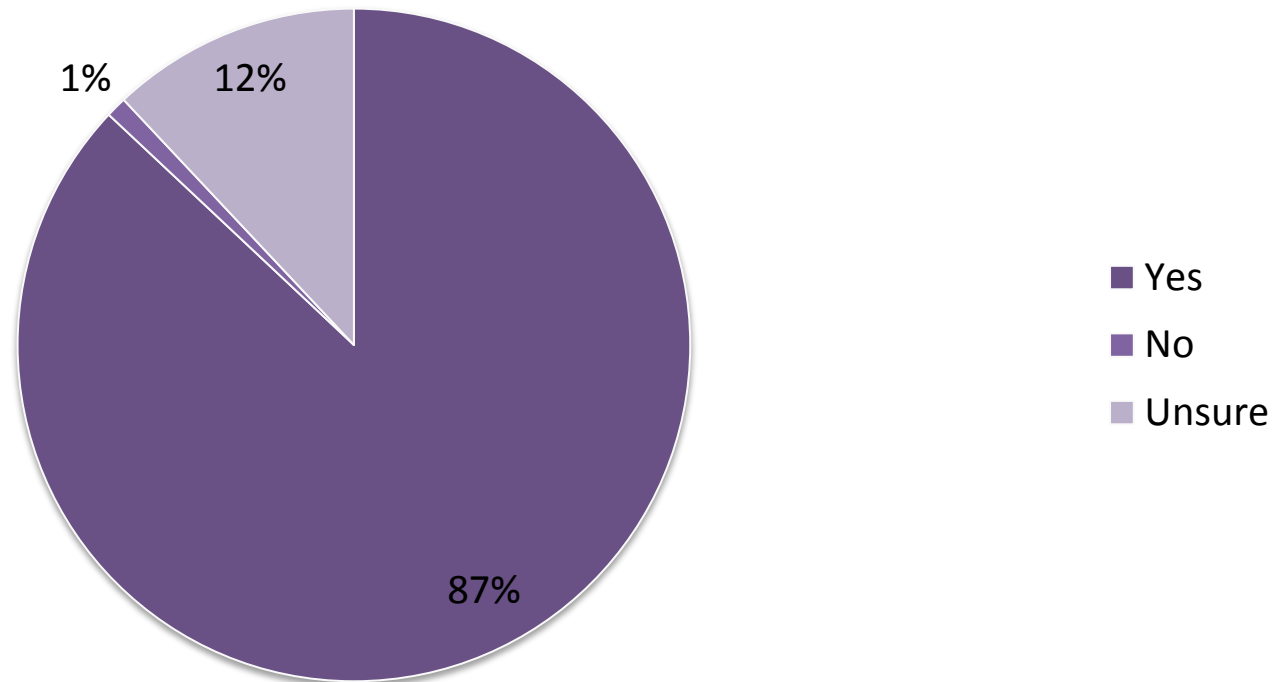
Previous Attendance



It was positive to see to see that, in 2017, 30% of the respondents had attended the event for the first time. This is another positive findings in terms of the overall growth of the event as this figure was very similar back in 2012.

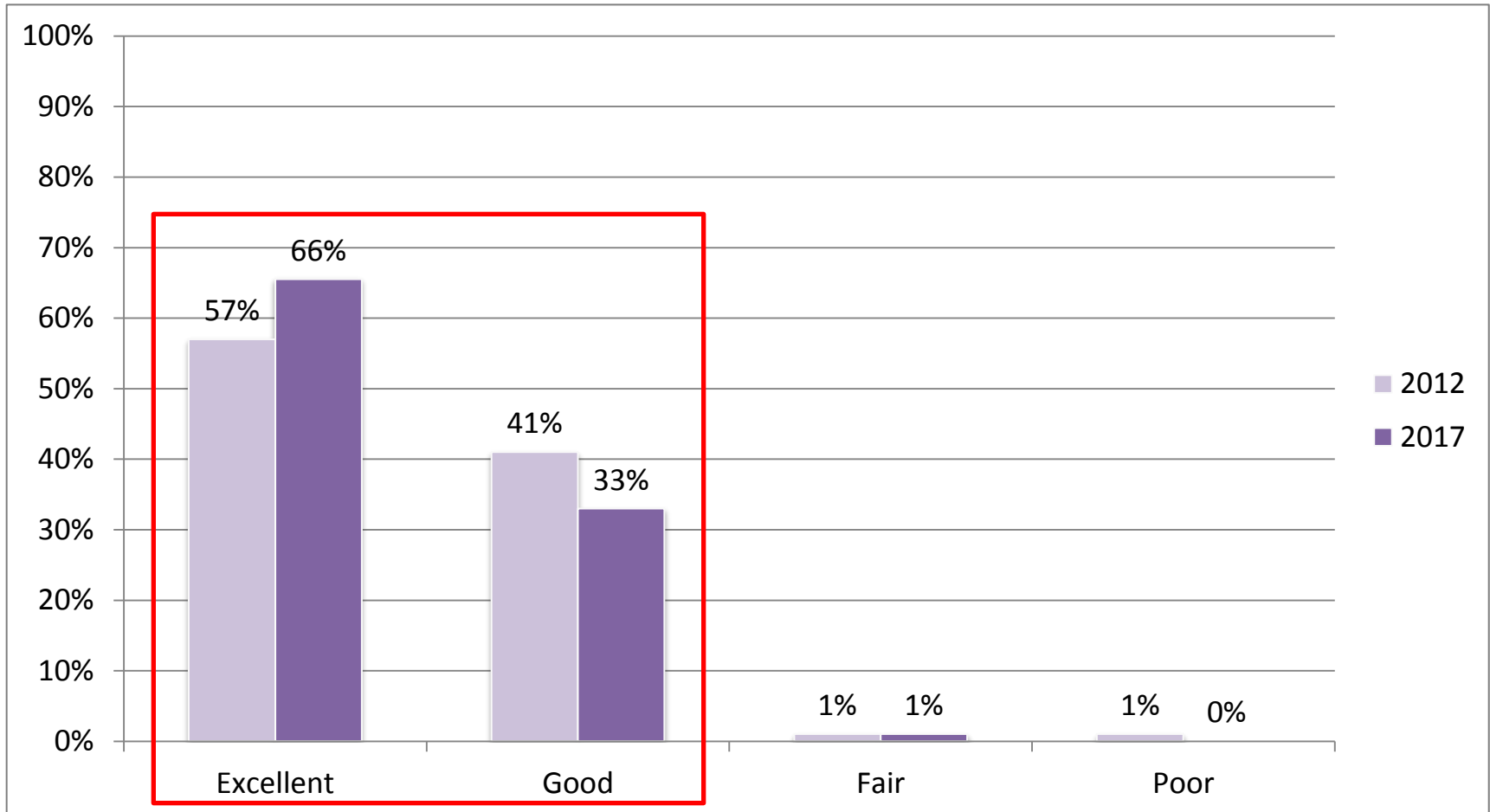
Future Attendance (by Previous Attendance)

2017



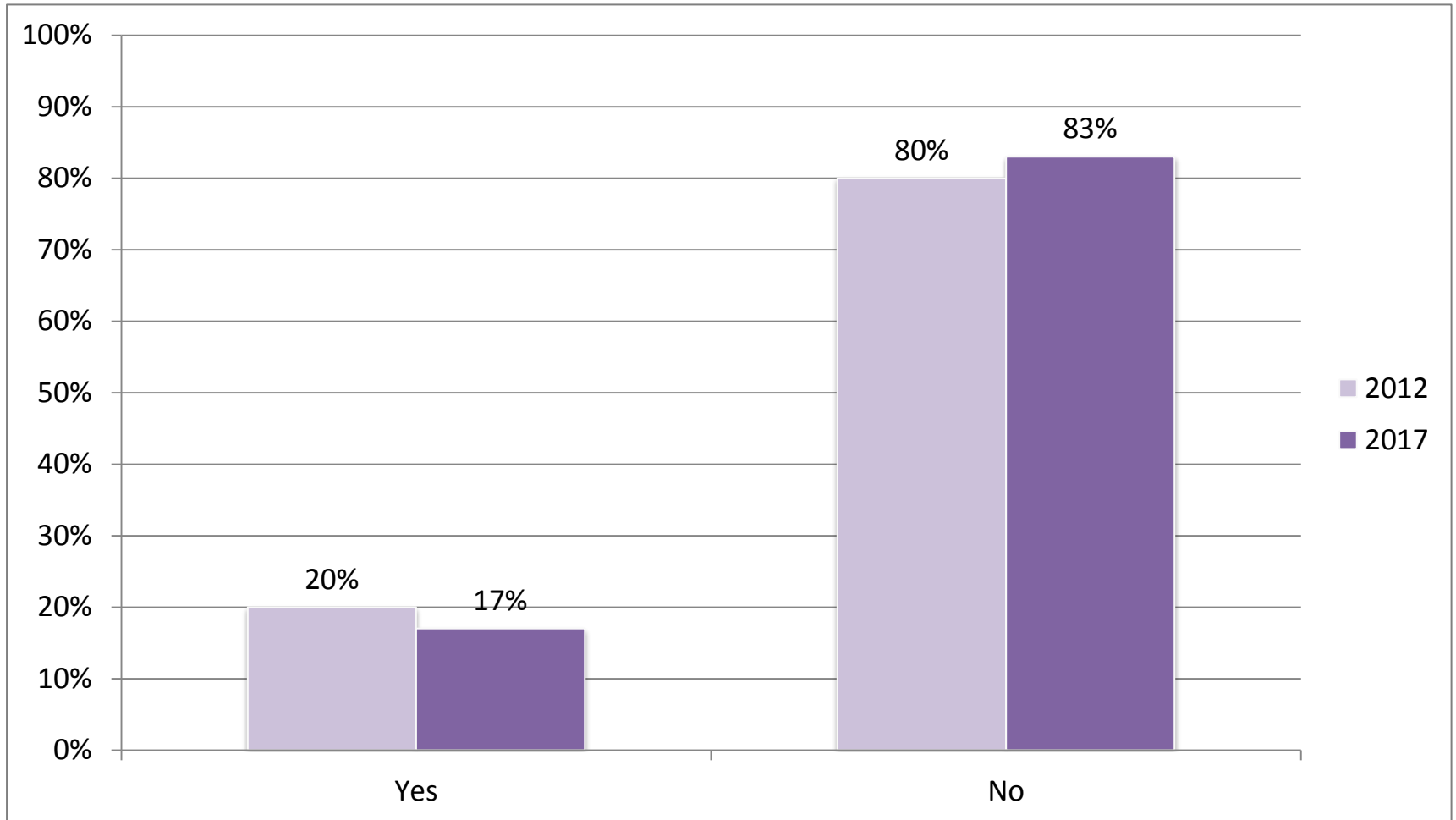
When considering those respondents who said that they had NOT attended the event before – 87% of these indicated that they plan to attend the event again in the future. In addition to this, a further 12% could possibly add to this figure. This is **extremely positive** for the growth of the event.

Experience Rating



Approximately 99% of all the respondents had either an 'excellent' (66%) or 'good' (33%) experience at the event – in addition to this, there was a 9% increase (when comparing 2017 and 2012) in the number of respondents who had an 'excellent' experience. This is very encouraging for the event.

Experienced Problems?



It is positive to note that only 17% of the respondents experienced problems at the event. However, the problems that were experienced are listed on the next slide.

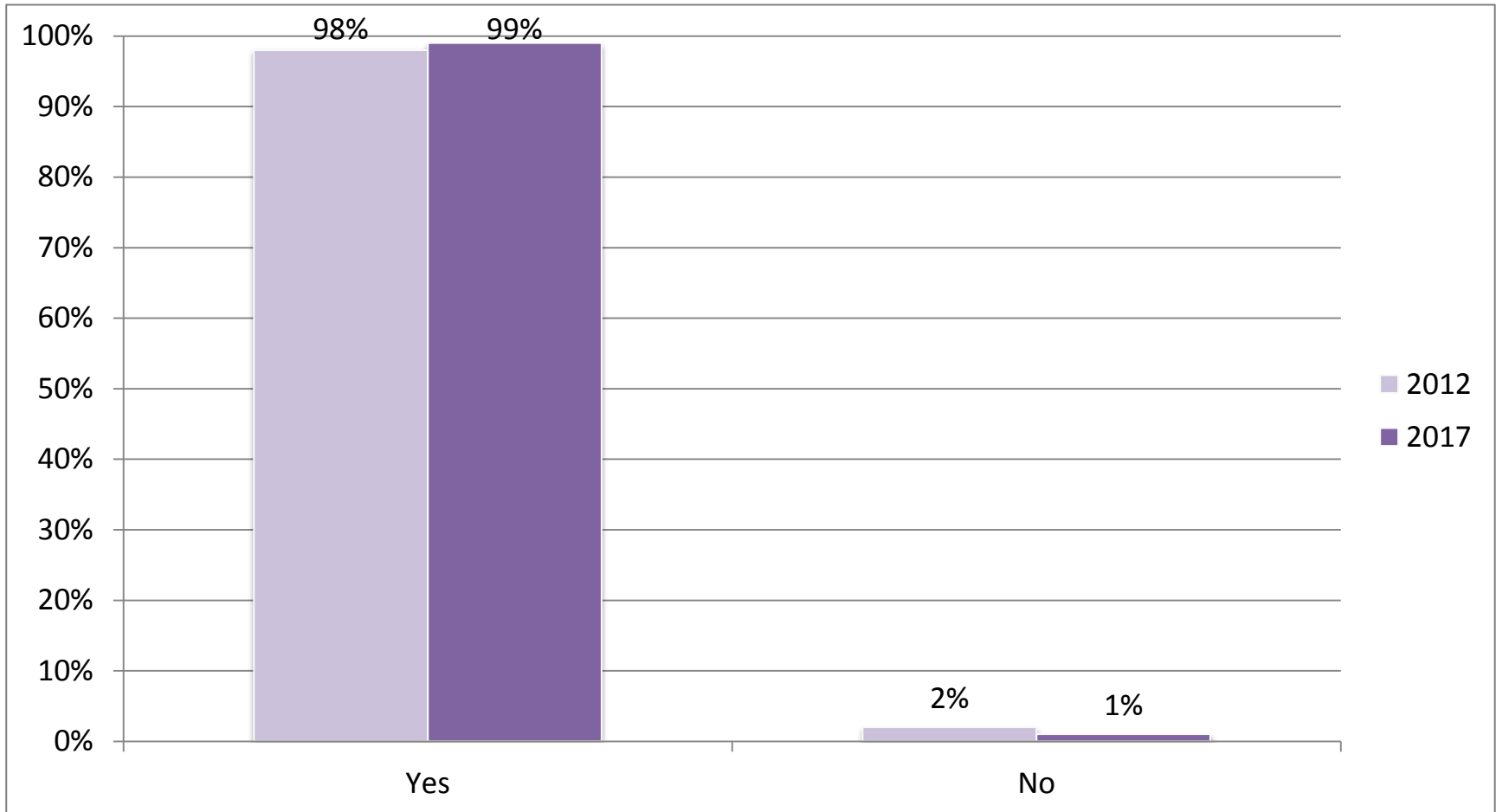
Problems Experienced



Some of the problems listed by the **respondents** included:

- Not enough signage leading to the event.
- The bars were slow and sometimes close too early.
- Toilet issues:
 - Messy and stinky
 - Lines were often too long
 - The unisex nature caused issues (boys vs girls habits)
 - Toilet paper shortages
- Shortage of showers and lines were too long.
- 'Car boot music' and inconsiderate people in the mornings.
- Not enough coffee shops.

Recommend the Event to Family & Friends?



When asked if they would recommend the event to family and friends, 99% of the respondents said that they would. This is a positive sign as it shows that 'Word-of-Mouth' will likely continue to be a common influence for people to attend the event.

Reasons for Recommending the Event



Respondents cited some of the following reasons as recommendations:

- A “great” / “fun” / “awesome” / “amazing” event.
- A family friendly event.
- The experience is like no other and is a true value for money.
- Great music and atmosphere.
- A beautiful destination and surroundings.
- Accommodates all cultures and types of people.
- The best festival.
- Relaxing event and is great to get outdoors.
- A well organized event.

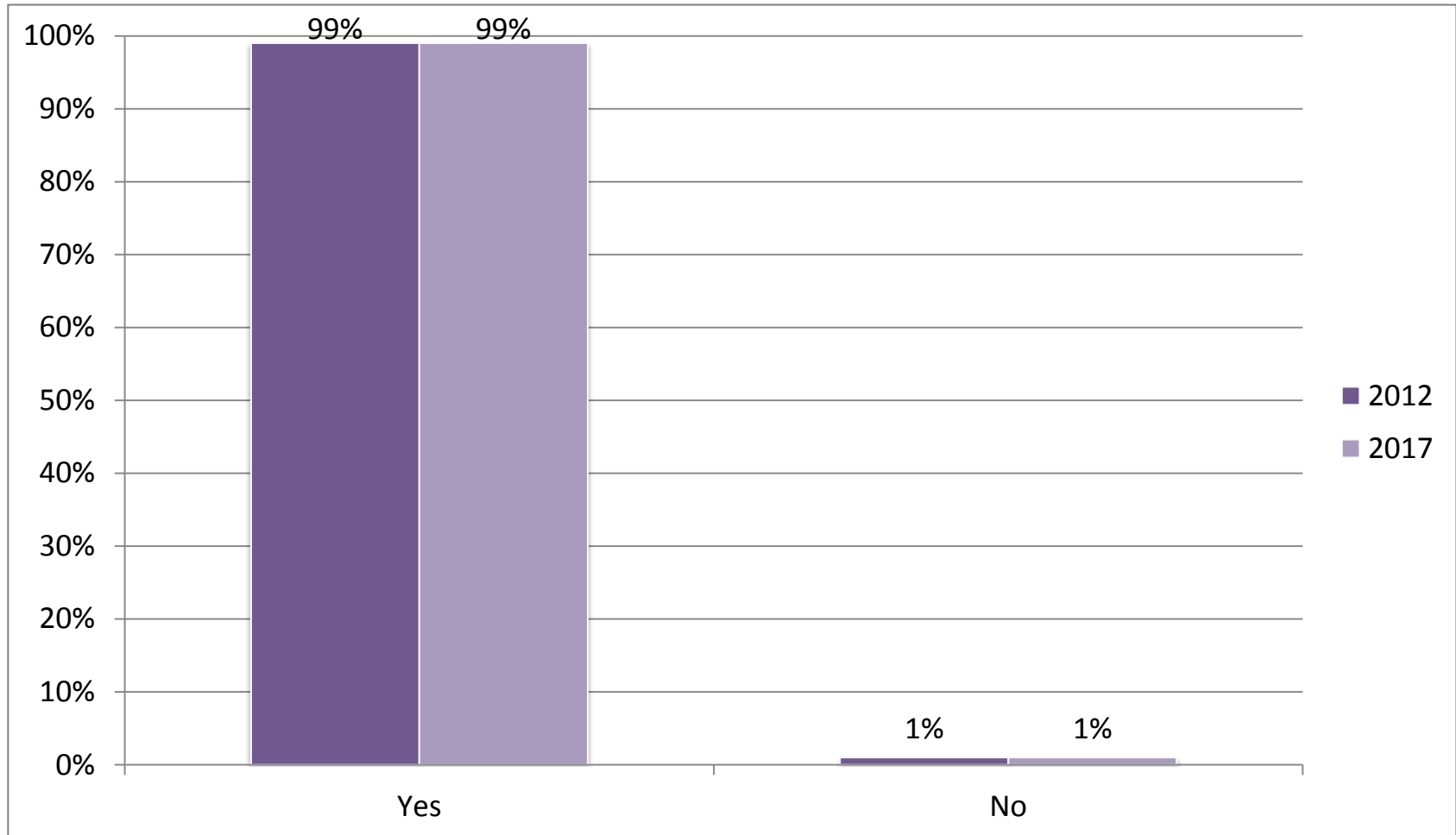
Event Improvement Suggestions



The **respondents** have noted the following suggestions in terms of improving the event in the future:

- Increased signage and information boards.
- More showers and accompanying facilities.
- Improved toilet facilities and more toilets.
- Bring back the male urinals and allow for separate gender toilets.
- Proper recycling bins – paper, plastic, cans, food waste etc.
- A wider variety of food stalls.
- More coffee shops.
- More fires in the tree covered areas such as the Treehouse Stage.
- Lights in the toilets.
- More bar staff.

Recommend KZN as a Tourist Destination?



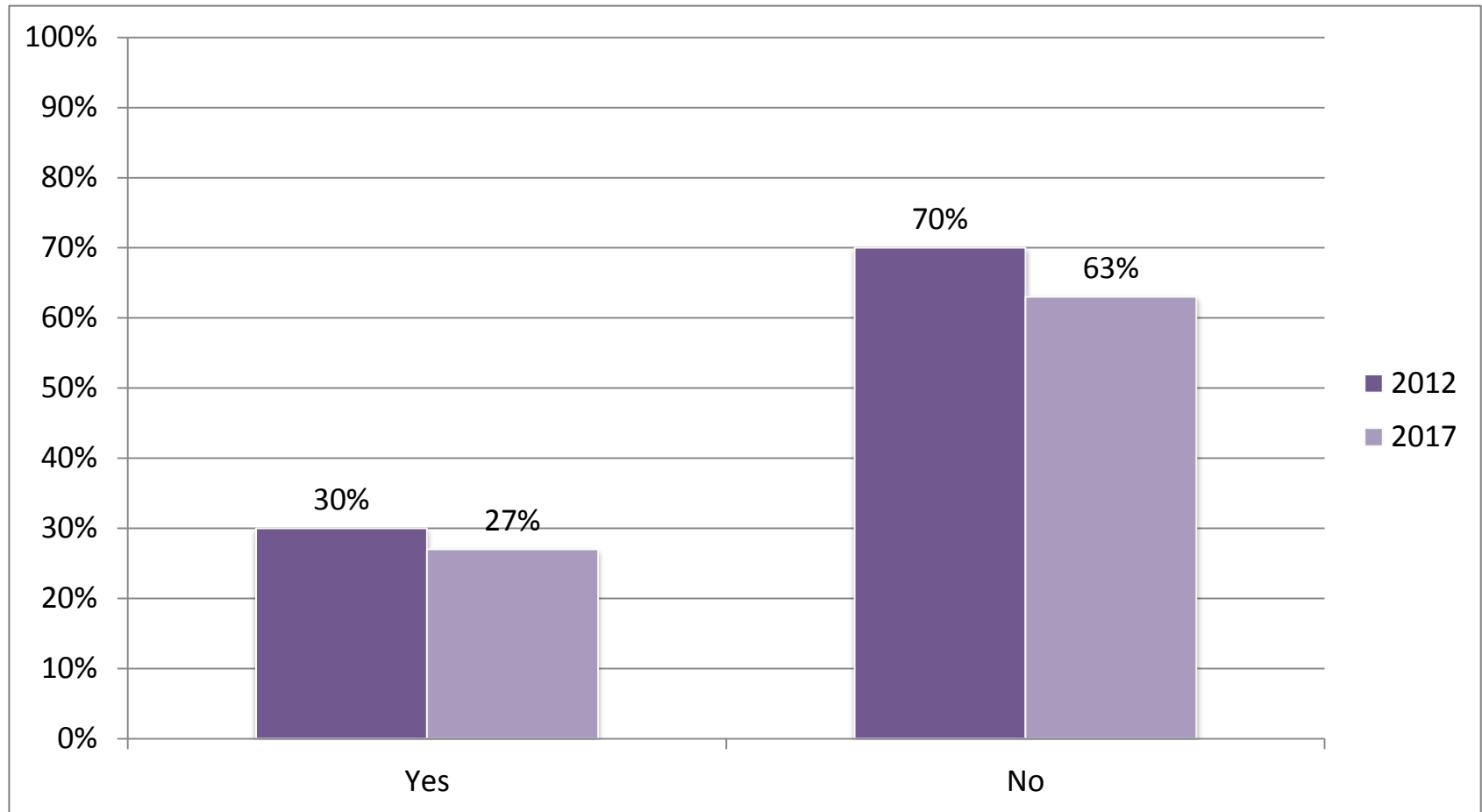
It is positive to note that 99% of the respondents said that they would recommend KZN as a tourist destination to their friends and family.

Reasons for Recommending KZN as a Tourist Destination



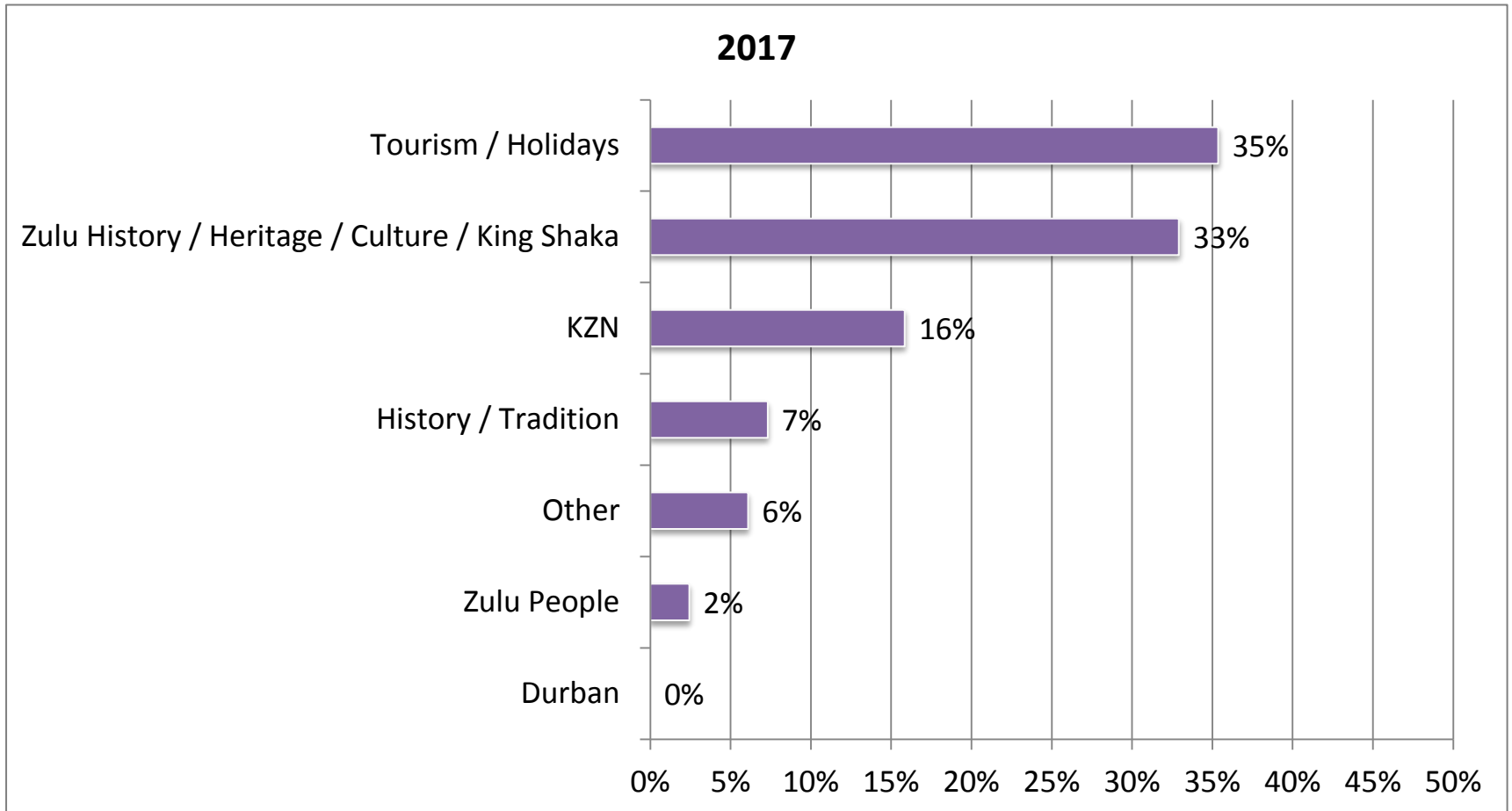
- Lots to do in the province
- Perfect weather and climate all year around
- Friendly people
- Beautiful scenery
- All destinations are different and unique, and easy to access
- Beaches are the best
- Variety of cultures

Familiar with Zulu Kingdom Slogan?



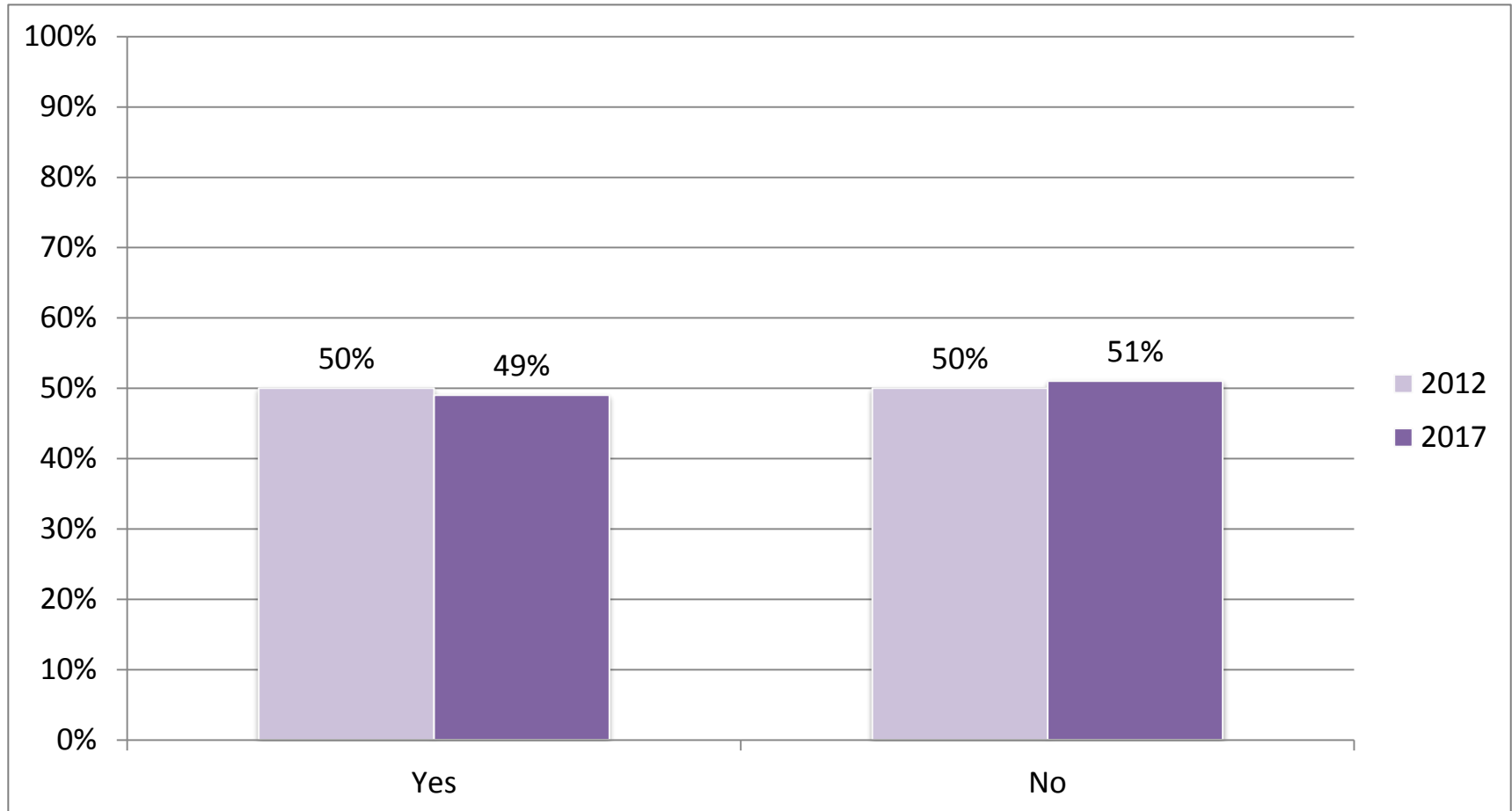
Only 27% of the respondents had noted that they were familiar with TKZN's slogan, "Zulu Kingdom. Exceptional" – meaning that over 60% were unfamiliar with the slogan. This is a negative finding in terms of TKZN's brand awareness.

'Zulu Kingdom Slogan': Associations



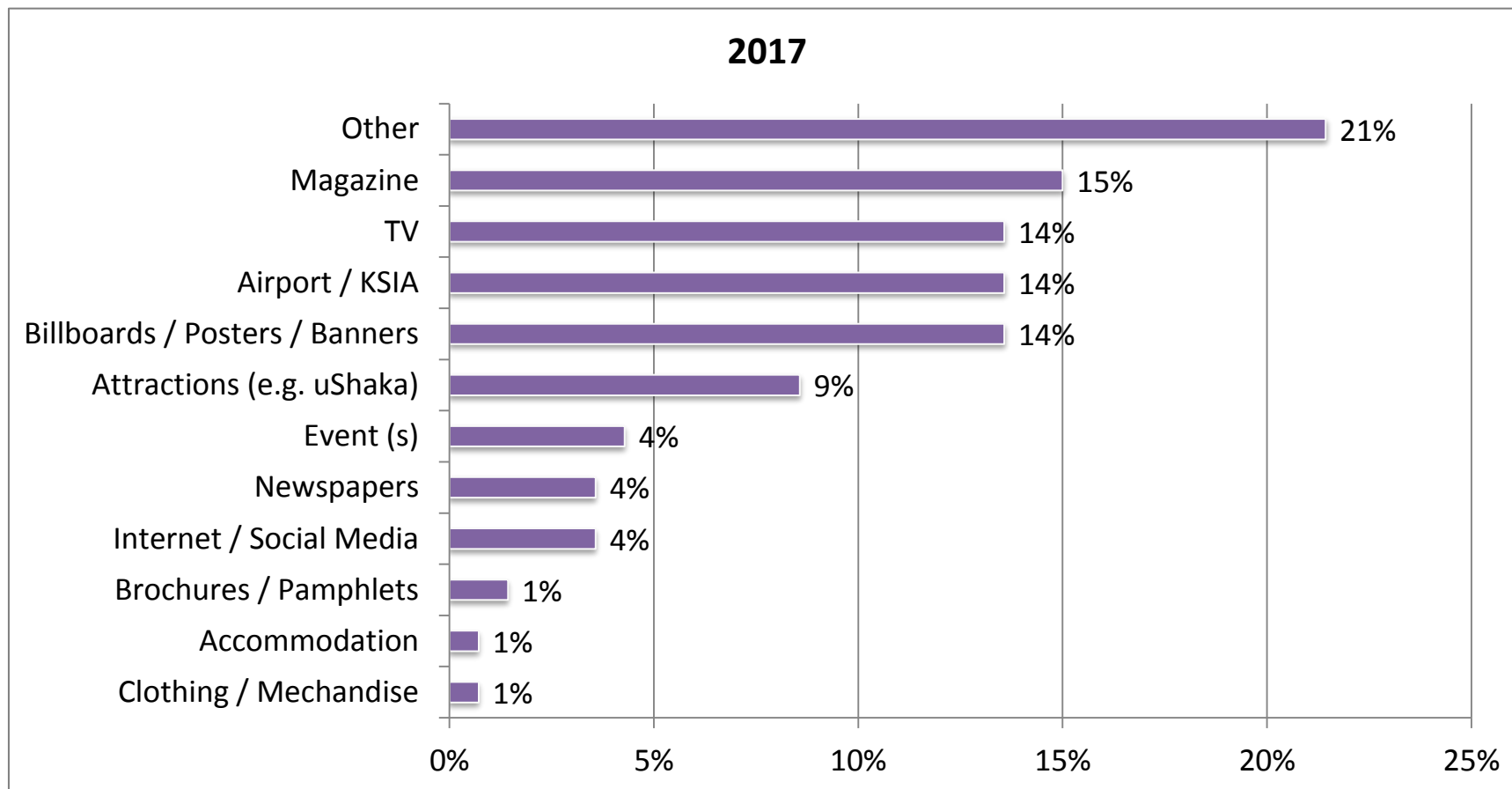
It is very positive to note that the majority of the respondents had associated the TKZN slogan with 'Tourism/Holidays' (35%). This was then followed by those who associated the slogan with 'Zulu History/Heritage/Culture/King Shaka' (33%), which has always been the common association,

Noted Zulu Kingdom Logo?



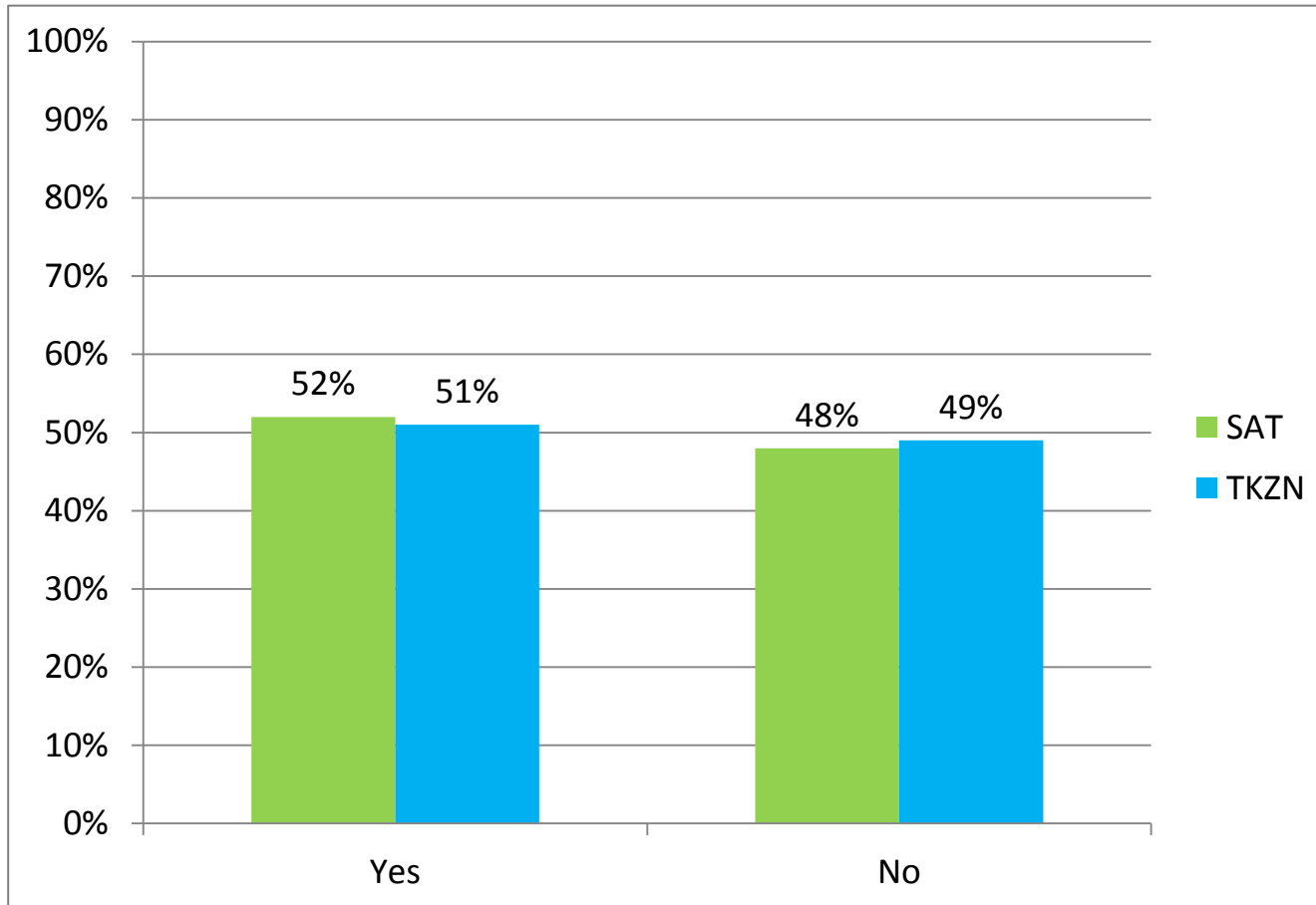
It is evident from the graph that the divide between the respondents who had and who had not noted the TKZN logo was almost 50/50, i.e. equal, in both 2012 and 2017. This finding is positive in a way that at least some of the respondents had noted the TKZN logo, however there is still room for increased brand awareness.

Where Zulu Kingdom Logo Noted? (Top 10)



The 'Other' (the majority of 21%) category included those respondents who "cannot recall" where they had seen the logo, and those who had seen the logo at a Tourism Information Office. Following this, people had noted the logo in 'Magazines' (15%), on 'TV', at the 'Airport', and on 'Billboards/Posters/Banners' (each 14%), and at various 'Attractions' (9%).

TKZN vs SAT Logo



In 2017, the respondents were asked if they had either the TKZN or the SAT logo. Although there is a slight difference, more people had noted the SAT than the TKZN logo – even though look very similar.

Spend Breakdown: Local vs Visitor



Local Resident		2017
Items	Amount	
Accommodation		
Food & Beverage	R933	
Transport	R190	
Entertainment	-	
Souvenirs/Other	R360	
Festival Tickets	R1 691	
Total Average Spend	R2 199	

All Visitors		2017
Items	Amount	
Accommodation*	R216	
Food & Beverage	R826	
Transport	R650	
Entertainment	-	
Souvenirs/Other	R279	
Festival Tickets	R1 156	
Total Average Spend	R3 110	

It is evident that visitors are very important for the overall economic impact of the event due to their higher average spend at the event. However, in this case, the local residents also had a high average spend but this is NOT included in the calculations of the economic impact – yet it was worth noting. It is difficult to ascertain why there is a difference in the spend on festival tickets for the locals and visitors, but it could well be due to the locals possibly buying ‘day passes’ which costed less.

* Based on **overnight visitors** only – it should also be noted that the vast majority of the overnight visitors were camping at the festival and this cost was included in the festival ticket, hence the low average spend on accommodation.

Estimated Economic Impact: Visitors & Local Residents



	2017	
	Visitors	Local Residents
Number	6 506	415
*Low Estimate	R17 566 285	R413 961
**Middle Estimate	R20 232 580	R954 777
***High Estimate	R22 768 755	R1 495 592

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

**No Margin of Error

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

It is important to note that all visitors are grouped together in the table above as the sample size for the day visitors was too small to be calculated separately. Even though there was only a small number of local residents, their spend was included in the table above to show the importance of visitors to the region and their estimated economic impact.

Total Estimated Economic Impact: Visitors Only



2012		
	Direct Spend	Multiplier of 1,42*
Low Estimate	R13 750 000	R19 500 000
High Estimate	R15 740 000	R22 300 000

2017		
	Direct Spend	Multiplier of 2,0*
Low Estimate	R17 566 285	R35 132 570
High Estimate	R22 768 755	R45 537 510

Note: In 2012, the multiplier of 1,42 was used. This was changed to a multiplier of 2,0 in the year 2015. This data was brought in to form a comparison with 2017.

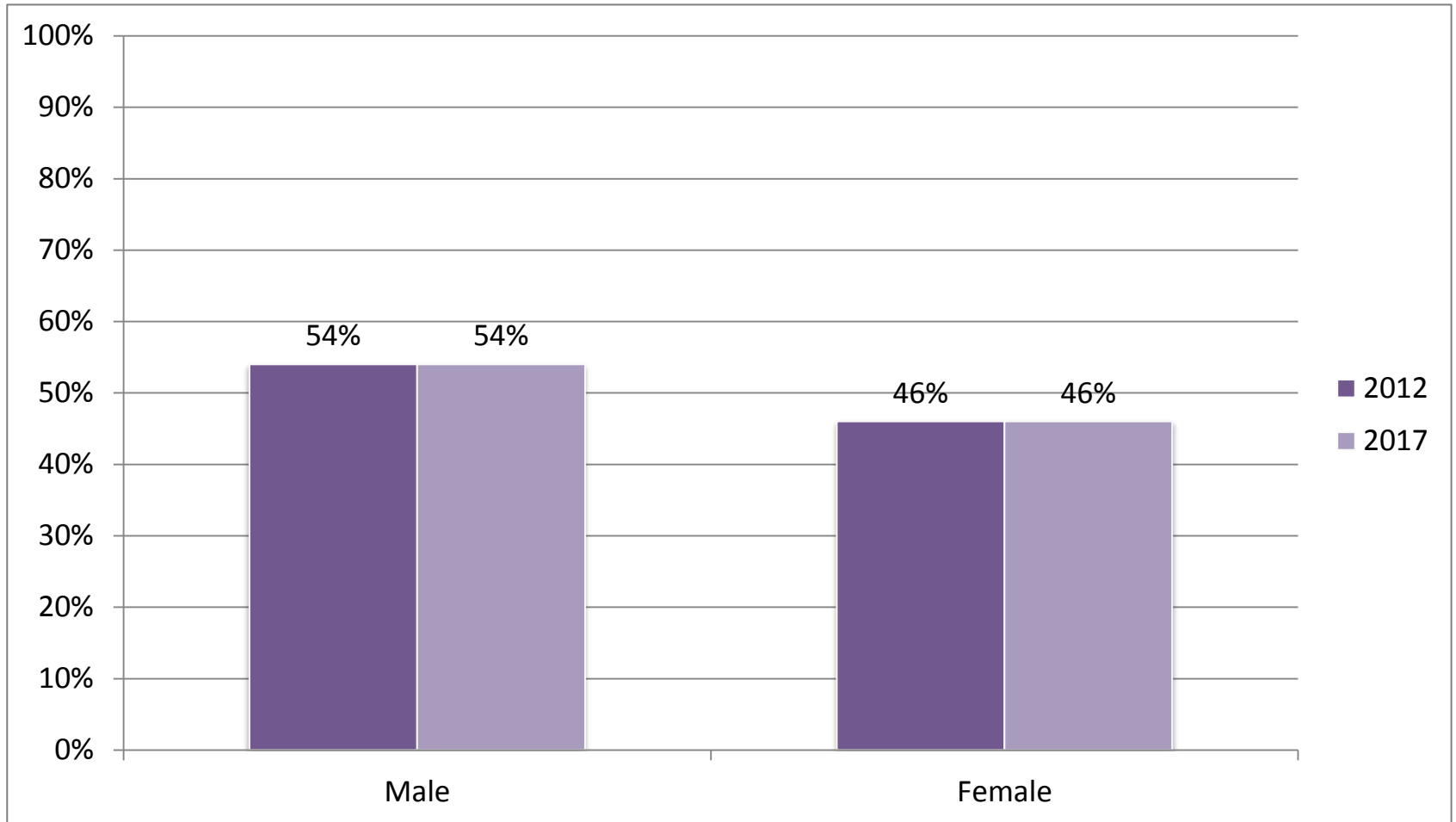
This is an estimate based on the direct spend of **visitors only**. Thus, local residents are excluded from this figure ('recycled money').

*This is also referred to as the **Indirect Economic Impact** as it refers to the increased spend by locals from revenue generated through the event.

The value of the **2017 Splashy Fen** was therefore estimated to be between:

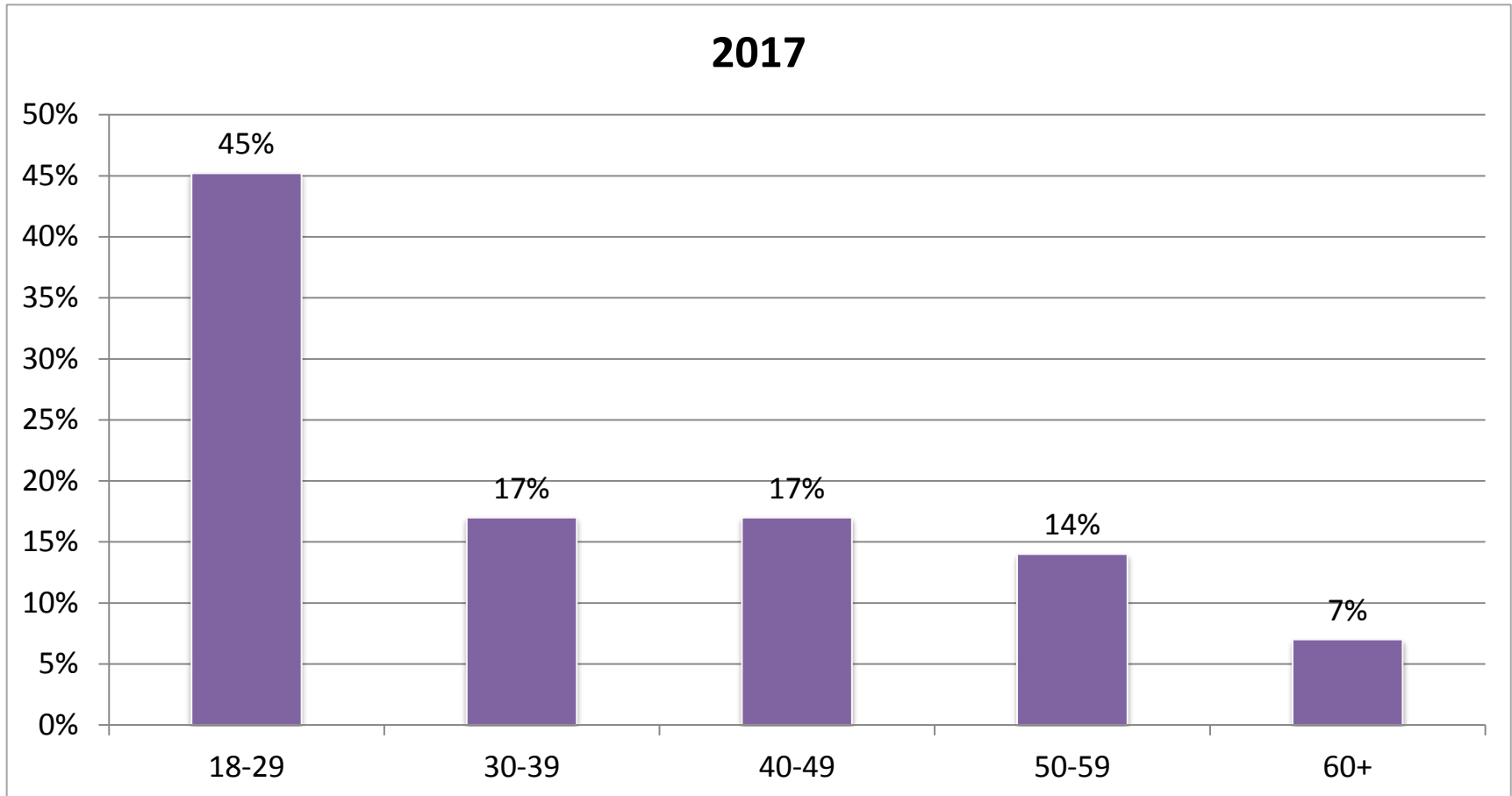
R35,1 million and R45,5 million

Demographics: Gender



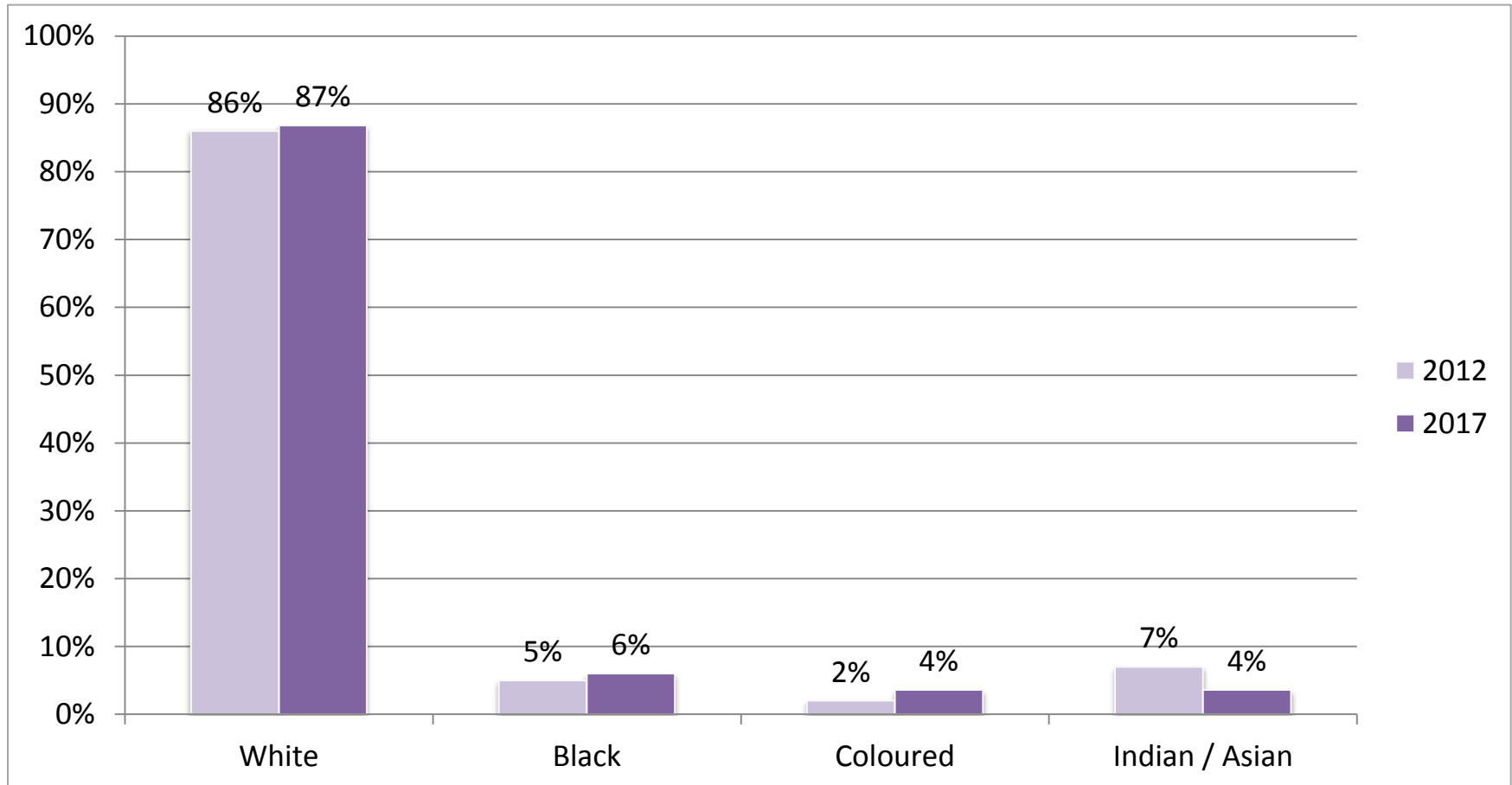
The majority of the respondents were Male (54%) while 46% were female. There are no further significant notes to be made in this regard.

Demographics: Age Groups



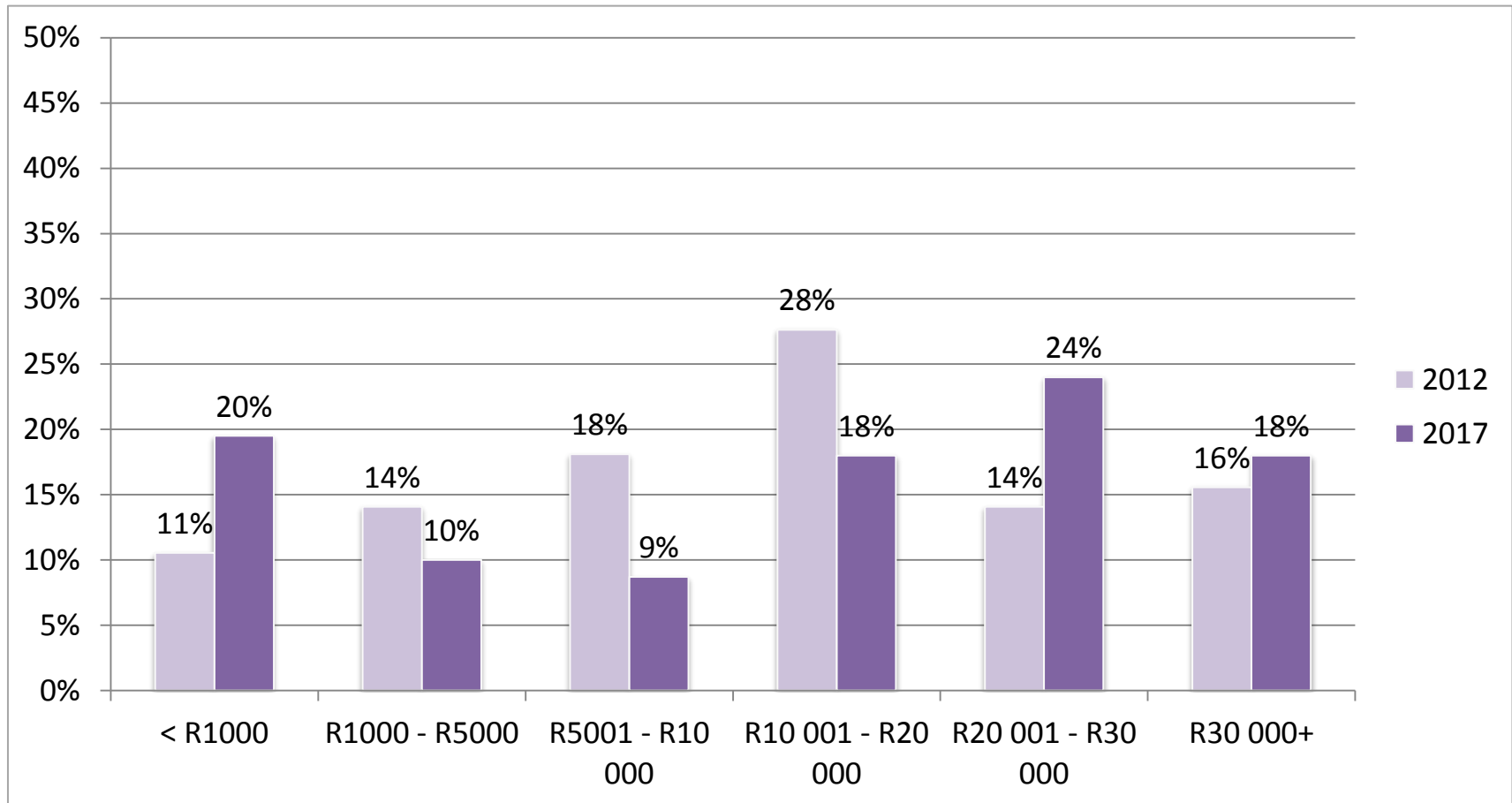
It is evident that the event attracts a large number of respondents from the younger generations as 45% were between the ages 18 and 29. Following this, 34% of the respondents were between the ages '30-49'. These findings can be used in future marketing campaigns in terms of targeting the current majority as well as targeting the minority in terms of future attendance.

Demographics: Population Group



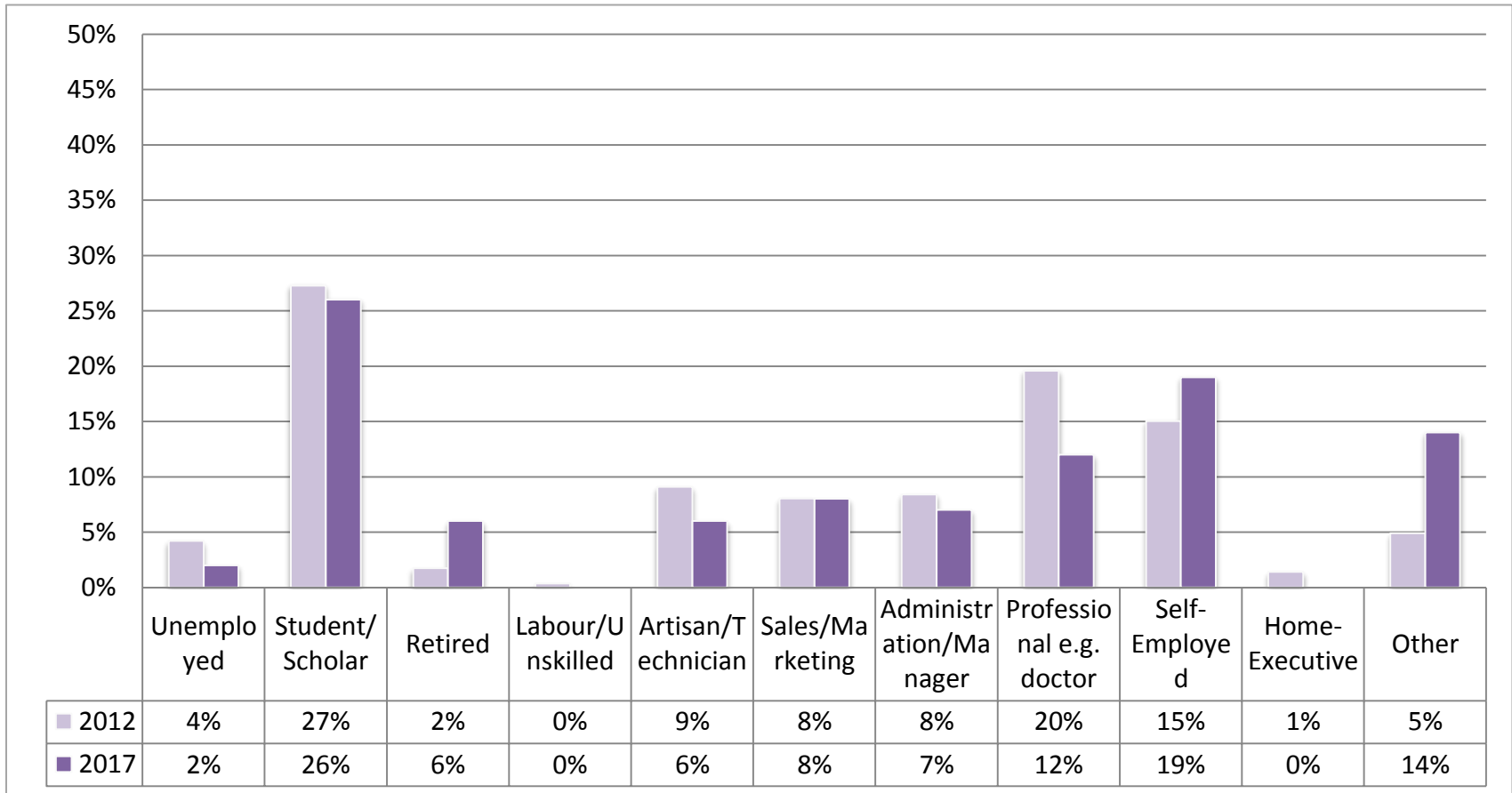
It is evident that the event is well patronised by those from the 'White' population group. These findings show that there is maybe a need to promote the event more to other population groups, but it is also a factor of the nature of the event, i.e. the type of experiences offered

Demographics: Income



There seems to be a widespread of respondents with differing income levels. It was noted that 24% of the respondents earn between 'R20 001 – R30 000' per month, while 20% earn less than R1000 per month. It is also interesting to note that the joint third highest income level was R30 000 plus.

Demographics: Occupation



It is interesting to see that the range of respondent's occupations reflects the range of income levels. The fact that 26% of the respondents are 'Student/Scholar' matches those who earn less than R1000 per month. Furthermore, the fact that 12% of the respondents were 'Professionals' and 19% were 'Self-Employed' match the higher income levels.

Main Findings



- 1) It was positive to note that 94% of the respondents were visitors to the Underberg region during the time of the event, while only 6% were local residents. This has had a positive impact on the economic value of the event.
- 2) In addition the finding above, it was noted that overnight visitors made up 93,6% of the visitors, while only 0,4% were day visitors.
- 3) The organizers of the event had confirmed that 6 921 people had attended the festival in 2017. This figure was slightly down when comparing it with the 2012 event, but this has by no means had a negative impact on the value of the event.
- 4) It was noted that 7 respondents were from outside of the country, with most coming from the United Kingdom (2) and Ireland (2).
- 5) Almost all of the respondents (99%) were in the Underberg region for the primary purpose of attending Splashy Fen, with 88% being 'General Access', 6% being musicians, and 4% were vendors.

Main Findings



- 6) The majority (52%) of the respondents had stayed in the area (at the event) for 4 nights, while 25% stayed for 3 nights and 12% stayed for more than 4 nights. There was an increase in those who stayed for 3 and 4 nights and a decrease in those who stayed for more than 4 nights, when looking back at the data from 2012.
- 7) Almost all (96%) of the respondents made use of accommodation at the festival – with most camping (93%) and some stayed in the ‘Glamping’ village (3%). Some of the outside accommodation types included camping (2%), staying with friends or family (1%), and luxury hotels (1%).
- 8) The majority (97%) of the respondents travelled to the event in ‘Private Vehicles’. This is expected as the event takes place “off the beaten track” and is only accessible by vehicles. Also, the festival goers need to bring a lot of camping equipment for the event and thus the vehicles are the best to transport these to the event.
- 9) It was noted that 90% of the respondents had heard about the event, or were influenced to attend, by two non-traditional means of advertising – i.e. 55% were influenced by attending before, while 35% had heard through ‘Word-of-Mouth’. Also, 7% were influenced by ‘Internet/Social Media’.

Main Findings



- 10) The large majority (98%) of the respondents were satisfied with the information regarding the event. This is a positive finding as it is a reflection on the overall running of the event.
- 11) Although the majority of the respondents thought that the event was well marketed, some of the suggestions for improving the marketing were:
 - ✓ More radio coverage
 - ✓ Advertise in other provinces
 - ✓ Social media coverage
- 12) In 2017, it was noted that 87% of the respondents would attend the event again in the future, while 11% were unsure if they would. It was also positive to see that 30% of the respondents had attended the event for the first time in 2017. Further to this, 87% of those who had not attended before had mentioned that they plan to attend the event again – with 12% also being undecided.
- 13) It was extremely positive to note that 99% of the respondents had either an 'Excellent' (66%) or 'Good' (33%) experience at the event. There was a 9% increase in those who had an 'Excellent' experience when comparing 2017 with 2012.

Main Findings



- 14) The vast majority of the respondents (83% did NOT experience any problems at the event. However, the 17% who did had listed the following:
 - ✓ Toilet issues
 - ✓ Road signage
 - ✓ Showers

- 15) It was noted that 99% of the respondents would recommend the event to their family and friends. Some of the reasons for recommending the event include:
 - ✓ Family friendly
 - ✓ Unique experience
 - ✓ Beautiful setting

- 16) Although the majority of the respondents were very happy with the event, some of them have suggested the following for improving the event in future:
 - ✓ More signage and information boards
 - ✓ Better toilets and showers
 - ✓ Recycling bins
 - ✓ More coffee shops and more variety for food

Main Findings



- 17) It was noted that 99% of the respondents would recommend KZN as a tourism destination to their family and friends. Most of the respondents said that the weather, people, things to do, and the beaches are the main reasons for recommending the province.
- 18) Only 27% of the respondents were familiar with the TKZN slogan, “Zulu Kingdom. Exceptional.” This is a negative finding in terms of TKZN’s brand awareness. However, one positive finding was that 35% of the respondents had associated the slogan with ‘Tourism/Holidays’.
- 19) In 2017, only 49% of the respondents had seen the TKZN logo before. Most of the respondents (21%) were unsure where they had seen the logo before, and some at seen at a Tourism Information Office. Other locations included ‘magazines (15%), as well as ‘TV’, the ‘Airport’, and on ‘Billboards/Posters/Banners’ (14% each).
- 20) The average spend of all visitors at the event was estimated to be R3 110. This means that the economic impact of the event was estimated to be between **R35.1 million and R45.5 million.**

Main Findings



- 21) In 2017, 54% of the respondents were male, and 46% were female.
- 22) The majority of the respondents were between the ages 18 to 29 (45%), while 34% were between the ages 30 and 49.
- 23) A large number of the respondents were from the 'White' population group (87%), while 6% were 'Black' and 8% were either 'Coloured' (4%) or 'Indian/Asian' (4%).
- 24) In terms of income levels, there was a wide variety amongst the respondents with 24% earning between 'R20 001 – R30 000' per month and 20% earning less than R1000 per month.
- 25) Much like the income levels, there was also a range of occupations with 26% being a 'Student/Scholar' or 19% being 'Self-Employed'.

Recommendations



It is important that the issues raised by the respondents are addressed. This will help in sustaining and increasing the satisfaction levels of those who attended. Increased satisfaction will result in continuous attendance and create positive awareness about the event. In this regard, the following recommendations for the **organizers** were made by TKZN:

- 1) It is recommended that the organizers take into consideration the issues surrounding the toilets at the event, that have been noted by the respondents. As it is a prominent issue that has been raised, it is therefore important to attend to improving the toilets at the event. One of the suggestions is to create a separate section for males and females and to make use of the “X-shaped” urinal “porta-loos” for the males. This way, the less males will be using the same facilities as the females. Another option is to employ more ‘Janitors’ and especially those from the local area. As it is not the most glorious job, these staff will need to be managed fairly and appropriately as they do hold a crucial position at the festival.
- 2) In terms of the showers at the event, it is recommended that some research is conducted on how to increase the number of showers on offer – especially ones that can be set up and taken down after the event and are preferably solar powered (or another form of renewable energy). Even though the whole experience at Splashy is about having fun and not worrying about showering all the time, it seems as if the current consumers for the event do have a need for cleanliness and hygiene.

Recommendations



- 3) As the event takes place in a UNESCO World Heritage Site, and measures have been put in place to create a festival that is environmentally-friendly, it is therefore recommended that a proper recycling initiative is introduced at the festival in terms of waste management. Based on the suggestions from respondents, more bins should be provided throughout the festival. However, these bins should be in a sort of cluster whereby the people can discard different types of waste in separate bins/containers – such as plastic, paper/cardboard, cans, food material, and glass. It is also suggested that the bins are emptied regularly.

- 4) In terms of the signage and information boards both at the festival and leading to the festival, it is suggested that there is a mixture of both permanent and temporary signage boards that are erected. The reason for suggesting permanent signage is that this will ensure that the legacy of the festival remains fixed in the minds of all visitors to the Underberg region, throughout the year. Even when the festival is not on, people driving through the region will be reminded that this is “Splashy Territory” or the “Home of Splashy Fen”. Not only will this help with signage during the festival, but it is also a strategic marketing tool for attracting more people to the festival. A lot of Drakensberg resorts are in the region, so there is bound to be passers-by throughout the year, who will see these signs. The temporary signage can be used during the time of the event to allow the festival goers to find their way easier – especially those who have not been before and those from outside of KZN.

Recommendations



- 5) It is well-known that the weather at Splashy is often not the warmest, especially in the areas where the sunlight is covered during the day (such as in the forest by the Treehouse Stage). As per the suggestions of the respondents (regarding more fires), it is therefore recommended that the organizers possibly invest in wrought iron fire pits/holders which can be placed in certain areas where it is colder during the day and where most crowds gather at night. However, it should be considered that these are fixed into the ground to avoid people knocking them over or moving them.

- 6) As a few respondents had noted the need for more coffee shops, it is recommended that more companies are approached to run their store at the festival. However, it is recommended that the local businesses from Underberg are approached as well as it will be more valuable to the local economy. In addition to the coffee, respondents also noted the need for a wider variety of food stalls and also the return of some food stores from the past. Therefore, in terms of increasing the variety the applications to vendor at the festival should be screened and thus the organizers can determine the food types that will be sold. With regards to bringing back previous food stores, a loyalty system could be introduced whereby certain vendors are given a discount or priority to have a store at the festival.

Recommendations



- 7) It is also suggested that there more activities be introduced at the festival. One example of this would be to introduce an area in which a range of “carnival-type” games are set up - such as throwing the ball at tin cans to win a teddy bear. More research could be done on this. In addition to this, the festival could also have something that would gather crowds such as a mechanical bull. Also, it is recommended that more competitions are offered (such as the dress up competition) – examples of these include: a beer pong tournament, a trail run race, a boat race on the river, another dress up but to a them, amongst others.

Recommendations (contd.)



The following recommendations have been selected for **TKZN**:

- 1) TKZN should, once again, look into monitoring the brand awareness of the both the slogan and the logo as the numbers do not reveal any positive signs.
- 2) The researcher (or research team) should conduct further research on the best practice examples with regards to music festivals (such as Glastonbury in the UK and Coachella in the USA). It is expected that the lessons learnt from this research would assist the organizers in improving the event year after year.
- 3) It is recommended that the Marketing and PR departments look into investing in the event, both financially and in terms of supporting the event from a marketing and promotional perspective. As was evident in the findings, the event attracts a lot of visitors to the area which in a way shows evidence that it is a great platform to further market the province and the Drakensberg area. There are also opportunities along the road networks to and from the event for marketing campaigns. It is also worthwhile to note that there will be other tourists travelling due to the Easter Weekend, thus the timing is highly advantageous.