



LIMPOPO

PROVINCIAL GOVERNMENT  
REPUBLIC OF SOUTH AFRICA

DEPARTMENT OF  
ECONOMIC DEVELOPMENT, ENVIRONMENT & TOURISM



The economic trends analysis  
of Marula Festival in Limpopo

2015

Final report

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## ACRONYMS

DSAC: Department of Sports, Arts and Culture

Expo: Exposure

HSRC: Human Science Research Council

LEDET: Department of Economic Development, Environment and Tourism

LOC: Local Organizing Committee

LTA: Limpopo Tourism Agency

Pro-Am: Professionals-Amateurs

SMME: Small, Medium and Micro Enterprises

VIPs: Very Important Persons

## INTRODUCTION

The Department of Economic Development, Environment and Tourism conducted the study on the Economic Impact of Marula Festival.

The study assessed the economic impact of the Limpopo Marula Festival which was held at Ba-Phalaborwa in February and March 2015. Consistent with the objectives of linking the festivals with tourism creation, the town of Phalaborwa was chosen due to its location relative to major tourist attractions. This research project investigated issues beyond the traditional economic impact analysis by assessing other aspects of the festival. Traditionally, events impact assessments are generally focused at measuring the demand side of visitors spending and then estimating potential total impact. This study further assessed other aspects of the festival such as the tourism inducing effect, perceptions around the marketing of the event and the possibility of reducing expenditure leakages from the local economy.

Festivals are increasingly being seen as a means to stimulate economic and tourism activities in regions with economic problems, hence the increasing political focus on arts and cultural events, (Bowitz and Ibenholt, 2009). Although festivals have been studied empirically, in South Africa very few of these studies have focused on the economic impacts of these events, (Saayman and Saayman, 2006). Whilst Saayman and Saayman (2006) focused on the extent to which location influences the economic impact of three festivals in South Africa, this study concentrates on the economic impact of the Marula Festival in Ba-Phalaborwa, Limpopo. Given the differences between cultural festivals and big events in terms of scale and magnitude, this study will focus on the former. This focus is not only justified by the scale of the event but by the growing international literature on this theme. The advantage of this is that it allows us to focus only on the dynamics that are relevant to cultural festivals without conflating them with issues that are specific to big events. This holds true as complexities and impacts around big event projects with respect to infrastructure are not as important for arts festivals. There are several reasons why cities host cultural festivals like Marula. They are seen as tourist attractions that can draw tourists to the local economy thereby creating other tourist spin offs. The expenditure on the event also has a positive impact on the local economy.

According to Saayman (2000) the magnitude of the economic impact of tourism depends on:

- How many tourists visit a local economy?
- How long they stay?
- How much they spend there? and
- How tourism expenditure circulates through the local economy?

As can be expected the duration of stay has a strong influence over all the other variables. Drawing on the growing international literature that focuses on the assessment of the economic impact of cultural festivals on a local economy the following objectives will be assessed (HSRC, 2014).

### **1.1 Objectives**

The objectives of the study are listed below as follows:

- To determine the demographics of visitors to the festival
- To assess the expenditure distribution of festival attendees.
- To assess the economic impact (direct and indirect) before and after the festival
- To investigate whether businesses in and around Ba-Phalaborwa municipality are economically benefiting from the event.
- To investigate whether there is any social benefit derived from the event.

### **1.2 Methodology**

This chapter discusses the methodology that was used to assess the impact of the Marula festival on the Ba-Phalaborwa Local Municipality in the province of Limpopo. One of the critical aspects of the methodology is the estimation of visitor and organiser expenditures. Ideally as suggested by Faulner and Raybould's (1995) and Breen et al (2001) it would have been desirable to use a diary method to collect visitor expenditure estimates (see also Huhtala 2007, for diary method). This would have entailed handing out dairies to participants on the first day of the festival and then asking them to record their daily spending against a menu of expenses. Another method that would have produced better estimates of expenditure would have been to conduct the survey of visitors during the last day where visitors would be in a better position to recall actual realized expenditure instead of planned expenditure.

The idea would have been to avoid using estimates of planned expenditure. Although the diary recall method is generally more accurate than the simple survey recall method, both of these could not be used on the Marula festival due to the design of the event which seems to be anchored around a few events during the first weekend of the festival and the last weekend of the event. It is known from the literature that events organized in this way tend to attract a significant number of day visitors. It is also known that the accuracy of estimates from visitors taken on the first day of a week-long festival are usually relatively poor as visitors would not have any realised expenditure reference points to form accurate estimates of how much they will spend at the event (HSRC, 2014).

### **1.3 Sample sizes and research instruments**

Following a comprehensive literature review the following methodology was used. A visitor questionnaire was designed and distributed to festival attendees. Convenience based sampling of visitors at Impala Park Stadium at Ba-Phalaborwa was used. The final sample for the visitor survey saw 338 questionnaires.

To accurately capture the economic impact of the event and to also capture the magnitude of the leakage from the local economy a business questionnaire was also designed; this would capture the supply side. The final business survey administered 120 questionnaires which were used in the analysis presented in this report. The main objective of the business survey was to get an estimate of the size of the leakage from the local economy by finding out the proportion of inputs that businesses in Ba-Phalaborwa source from outside the municipality. The visitor questionnaire would capture the demand side and since the supply and demand of goods and services should equal this meant that the business survey would give us a good sense of the extent to which the festival influences the level of business in the local economy.

As suggested by the literature, the estimates of expenditure would come from the visitor survey. With the assumption that these reflected the expenditure patterns of a typical Marula festival attendee, together with the total number of people who attended the event, total direct spending will then be estimated. The total attendance figures were obtained from the event organizer based on the final ticket counts and attendance at the different events. Using this information it was possible to get estimates of the total economic impact (direct, indirect and induced impacts) of the 2015 Marula Cultural Festival on Ba-Phalaborwa.

## 1. SURVEY RESULTS AND FINDINGS

### 1.1 Introduction

The Department of Economic Development, Environment and Tourism (LEDET) in collaboration with Limpopo Tourism Agency (LTA) have embarked on data collection during the festivals and after the festivals with local businesses. The main purpose was to obtain estimates that would be used for the economic impact assessment of the festival. The concentrations were on visitors/attendance and businesses. Key findings will then be combined to estimate the total economic impact of the Marula Festival on Ba-Phalaborwa municipality.

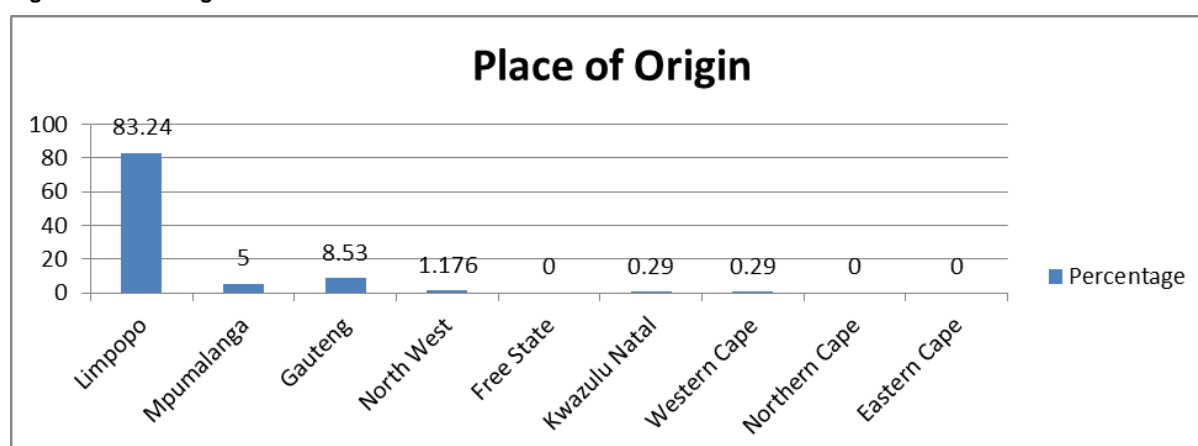
### 1.2 Results of the Visitors Survey

The visitor's survey will present the findings in three sections starting from the demographics, festival attendees and information on expenditure.

#### 1.2.1 Demographic

Majority of the visitors/attendees were South Africans at 98.5%, and 1.5% were from the following countries: Australia, Germany, Slovenia, and Mozambique. Out of the 98.5%, Limpopo was represented by 83%, Gauteng was 8.5%, Mpumalanga was 5%, North West 1.2%, whereas Kwazulu Natal and Western Cape were below 1%. The other three provinces, that is, Free State, Eastern Cape and Northern Cape were not represented as indicated on **fig 1**.

Fig. 1: Place of origin



**Table 1**, below also indicates the way the municipalities were represented. Some of the areas which are situated closer to each other were combined. Since this event was held at Ba-Phalaborwa, most of the attendees were from this area represented by 36.1%, followed

by Tzaneen at about 19%, Polokwane at 12%, Giyani was at 5% and surprisingly attendees from Gauteng were represented by 4% and the rest were at around 1% and below.

<b>SECTION A: DEMOGRAPHICS</b>		
<b>Table 1. Demographics</b>		
<b>Town</b>	<b>TOTAL</b>	<b>Percent</b>
Polokwane, Lebowakgomo,	42	12.43
Tzaneen, Sekororo, Nkowankowa	63	18.64
Phalaborwa, Namakgale, Makhushane, Mashishimale and Lulekani	122	36.09
Giyani	18	5.33
Gravellote	1	0.30
Modjadjiskloof, Kgapane	4	1.18
Makhado	4	1.18
Thohoyandou, Sibasa	9	2.66
Soweto, Bramficher, Johannesburg, Midrand and Braamfontein	14	4.14
Rustenberg, Tlabane	4	1.18
Accornhoek	2	0.59
Oudtshoorn	1	0.30
Pretoria	12	3.55
Germany, Wocken, Hamburg	2	0.59
Mbombela, Badplass	2	0.59
Hoedspruit	3	0.89
Mokopane	4	1.18
Mookgophong	1	0.30
Lephalale	2	0.59
Durban	1	0.30
Malamulele	2	0.59
Musina	2	0.59
Graskop	1	0.30
Burgesfort, Jane Furse	6	1.78
Bushbuckridge, Accornhoek, Hazyview	8	2.37
Mafikeng	1	0.30
Lenyenye	1	0.30
Modimolle	1	0.30
Nelspruit	3	0.89
Krugersdorp, Roodepoort	2	0.59
Alberton	1	0.30
<b>TOTAL</b>	<b>338</b>	<b>100.00</b>

Source: created by the author

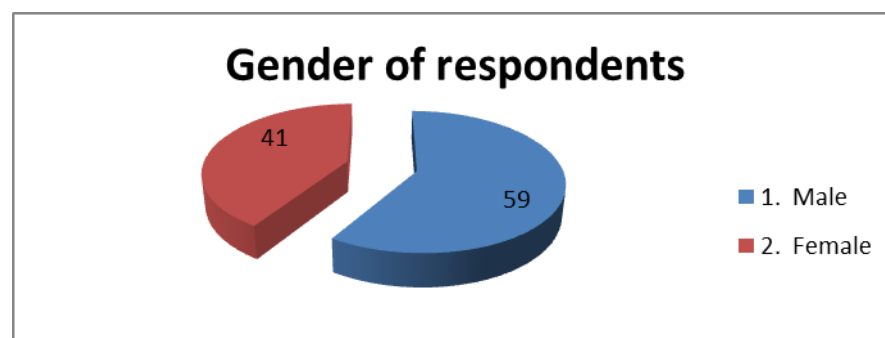
Respondents from other countries were in groups of more than ten (10). Some of them indicated that they were on official business and they decided to attend the festival as listed on **table 2** below.

<b>Table 2. Respondent from other countries</b>		
<b>Country</b>	<b>Total</b>	<b>Percentage</b>
Germany	2	40
Slovenia	1	20
Maputo	1	20
Australia	1	20
<b>TOTAL</b>	<b>5</b>	<b>100</b>

Source: created by the author

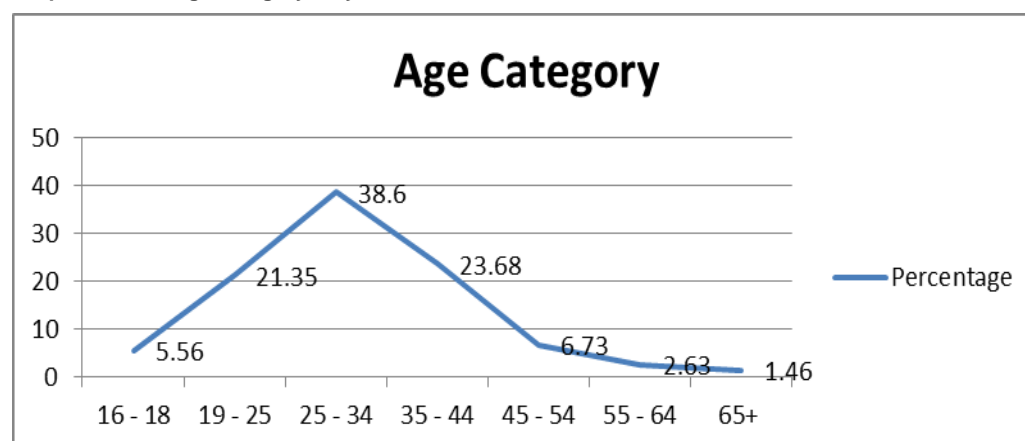
In terms of gender, most of the festival attendees were males at 59% and 41% females, as outlined on **fig. 2**, below.

**Fig. 2: Gender of respondent**



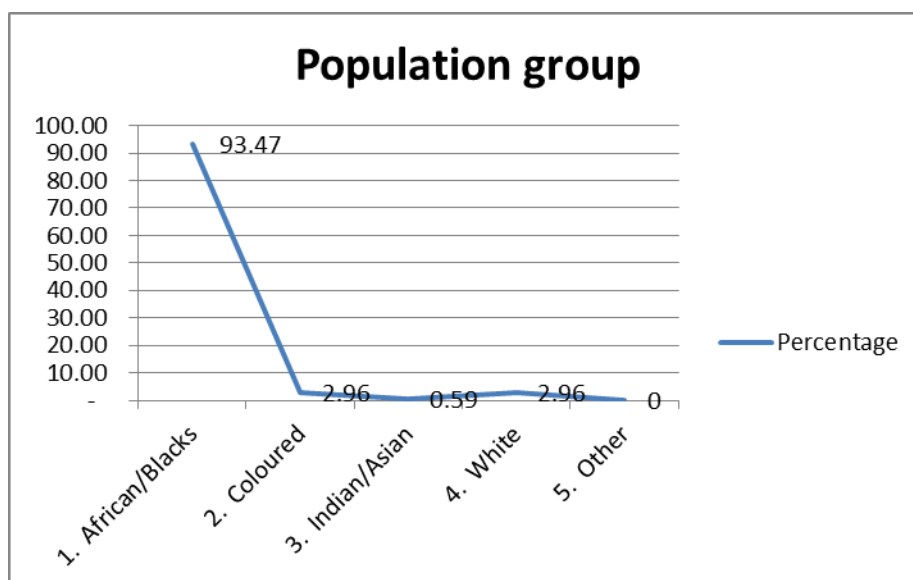
**Graph 1** below shows that the festival attracted mostly youth between the ages of 25 – 34 years at 39%. Those who are between the ages of 19 – 25 years and 35 – 44 years old are more or less of the same percentages at 21.4% and 34% respectively, but youth at a tender age of 16 – 18 years at 6%. From the age of 45 -65+ years old are below 10%.

**Graph 1: Which age category do you fall under?**



In this years' festival, all racial groups were represented in the festival which shows that all population groups. In **fig. 3** below, the population groups were represented as follows, African/Blacks were 93%, followed by coloured and whites at about 3% and Asians at about 1%.

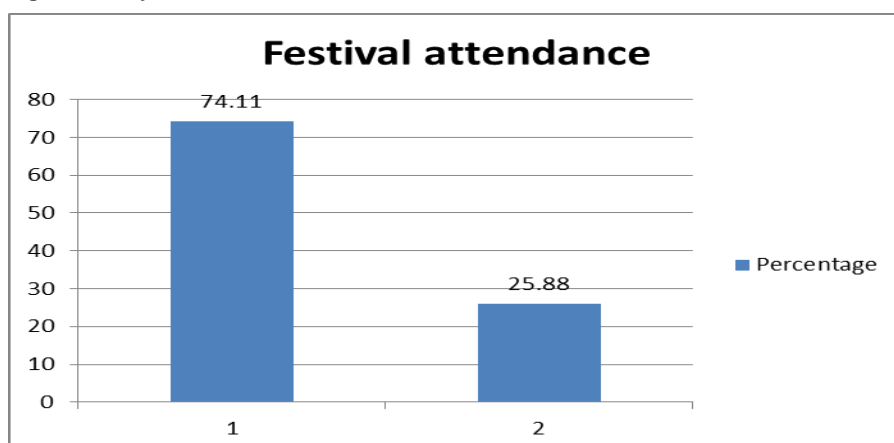
**Fig. 3: What population group do you belong to?**



## SECTION B: FESTIVAL ATTENDANCE

Most of the respondents indicated that they were used to attending the festival which was at 74% compared to 26% on new attendees. It shows consistence in terms of those who are attending the Marula Festival compared to what it was in the previous study.

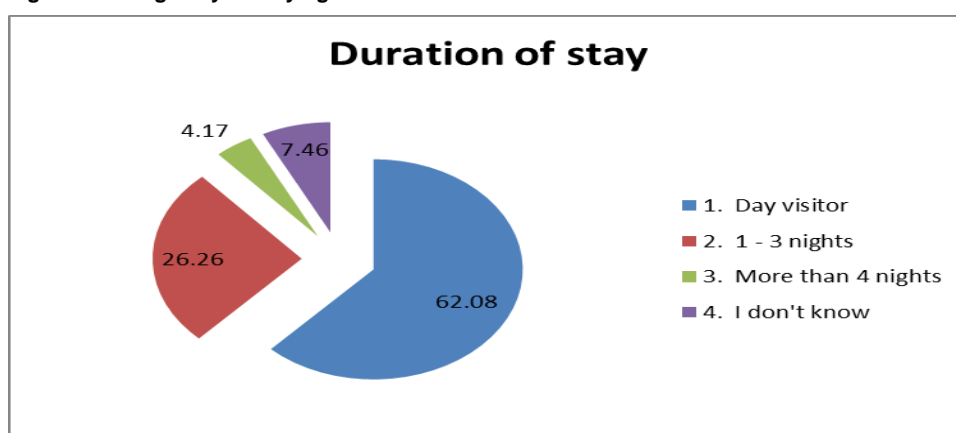
**Fig. 4: Have you attended the Marula festival before?**



Since the festival attracted visitors from various areas around the globe, a question on the period on which the attendees were supposed to stay was imposed to all. **Fig. 5** shows that most of the respondents were day visitors, which are at 62.1%. It also tells that most of the respondents were from local areas as were not intending to sleep over after the festival since it was ending in the morning.

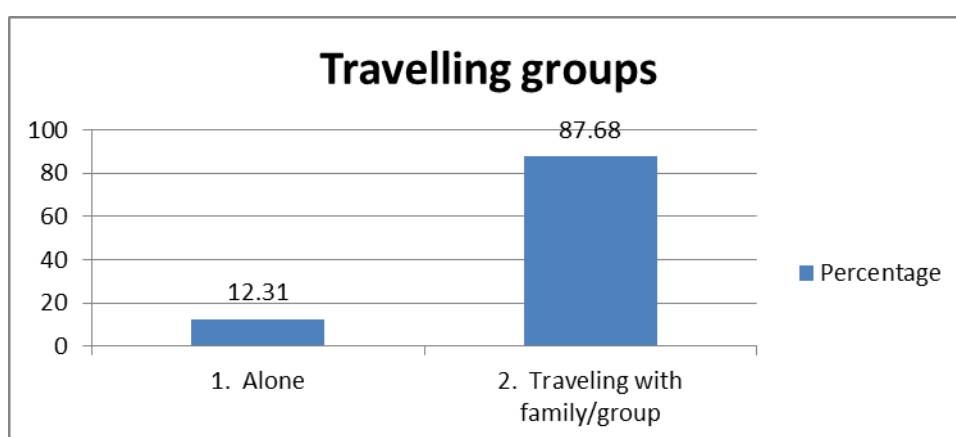
Because some of them did not want to lose their life due to fatigue, they decided to sleep after the festival, these respondents were staying for a period between 1 – 3 nights at 26.3%. Those who stayed for a period of more than 4 nights were at 4% and the 62% did not know.

**Fig.5: How long are you staying in Phalaborwa?**



**Fig. 6** below shows that most of the respondents attending the festival in groups or family partners which is 88% compared to 12% of those who attended alone.

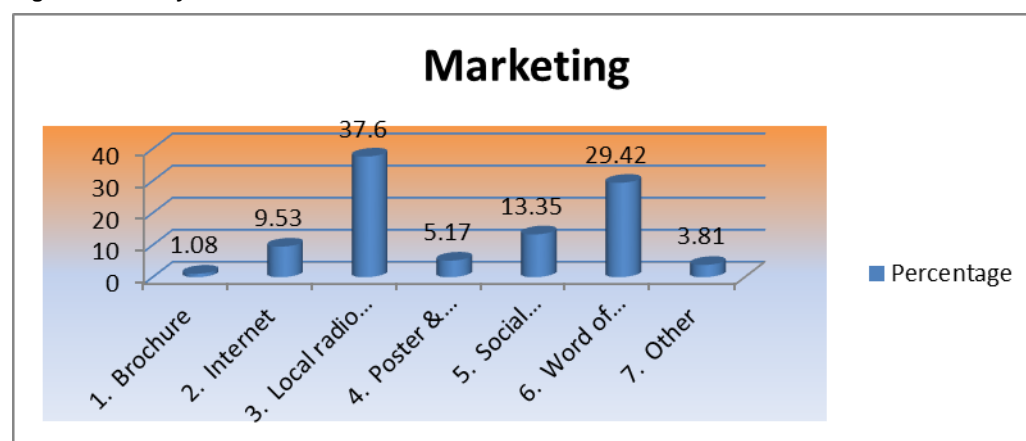
**Fig. 6: Are you attending the festival by yourself or are you traveling with your family or are you part of a group?**



The festival was covered in almost all marketing structures as indicated in **fig. 7** below. The most leading marketing area was on local radio stations and word of mouth which were 38% and 29% respectively. It is not surprising because most of the attendees were from the rural

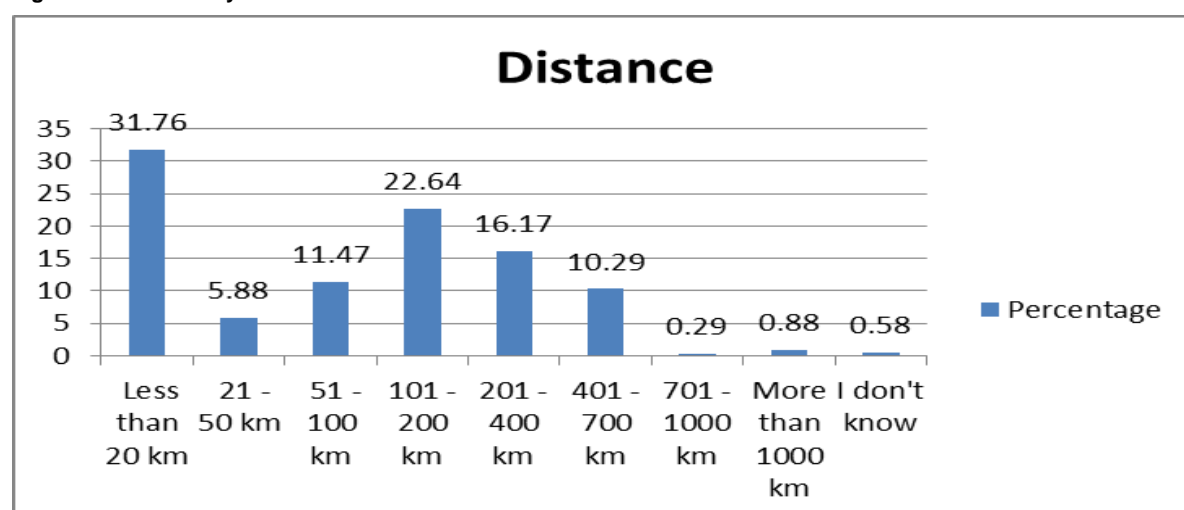
areas where radio is the most common media which is used to communicate with the respondents. Social media such as facebook or twitter is the third used marketing tool which was at 13%. The other three communication or marketing tools, that is, internet, posters & flyers, others and brochures were below 10%.

Fig. 7: How did you find out about the Marula festival?



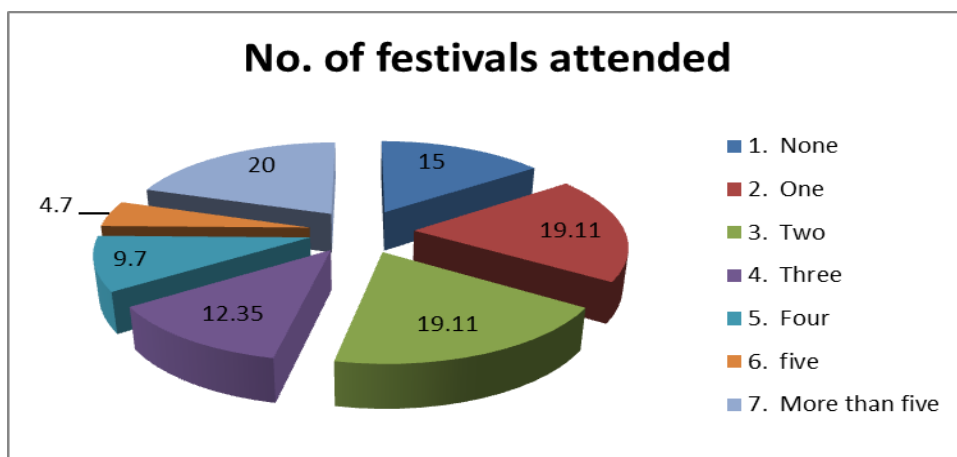
This festival attracted attendees as far as more than 1000 kms away. In terms of **fig. 8**, majority of the respondents travelled from around Ba-Phalaborwa which was less than 20 km at almost 32%, followed by those who travelled between 101 – 200 kms which was about 23%. Those who travelled between 201 – 400 kms were at 16%. Since it attracted less from other provinces and outside the country, the remaining percentages were for those who travelled between 21 – 50 kms, 401 kms and above.

Fig. 8: How far have you travelled to visit the Marula festival?



According to **fig 9** below, the respondents who attended the festival for more than five years was one and two times at 19%, followed by those who attended for more than five times at 20%. The festival has also attracted new comers which were at 15%. The other remaining attendees were below 10%.

**Fig. 9: How many festivals have you attended in the past 5 years in Limpopo?**

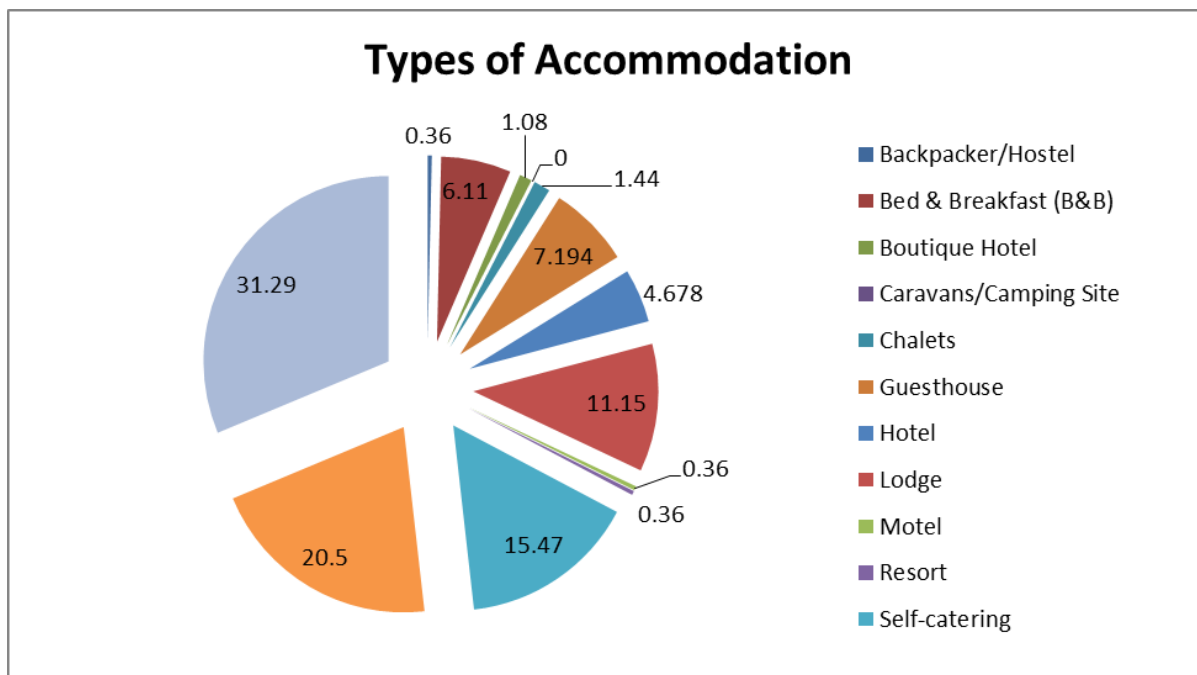


#### SECTION C: INFORMATION ON EXPENDITURE

**Table 4 and fig 10** below indicates that most of the festival attendees were accommodated on others than the one listed on the questionnaire, that is 31.3%, followed by those who were staying with friends/relatives. Although majority of the attendees indicated that they spent most of their monies on accommodation below, 15.5% were accommodated at self-catering outlets, and only 11.1% on lodges and guest house, 7%, bed and breakfast, 6%, chalets, 1.4%, hotels, 4.7%, boutique hotels, 1.1% and the rest below 1%.

<b>Table 4. What type of accommodation are you using whilst you are here in Phalaborwa attending the festival?</b>	<b>Total</b>	<b>Percentage</b>
1. Backpacker/Hostel	1	0.36
2. Bed & Breakfast (B&B)	17	6.12
3. Boutique Hotel	3	1.08
4. Caravans/Camping Site	0	0.00
5. Chalets	4	1.44
6. Guesthouse	20	7.19
7. Hotel	13	4.68
8. Lodge	31	11.15
9. Motel	1	0.36
10. Resort	1	0.36
11. Self-catering	43	15.47
12. Staying with friends/relatives	57	20.50
13. Other	87	31.29
<b>TOTAL</b>	<b>278</b>	<b>100.00</b>

Fig. 10: What type of accommodation are you using whilst you are here in Phalaborwa attending the festival?

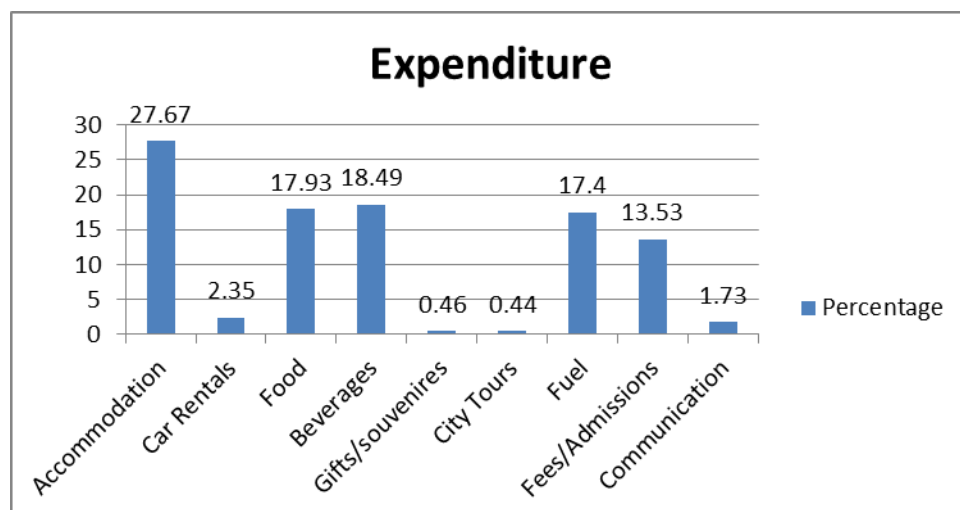


In **Table 5**, the respondents show that they spent a lot of money on accommodation which is almost 28%. This shows that they take care of their life, because it is not advisable to drive while tired. It is followed by beverages at 18.5%, food which gave them strength was at 17.9%, fuel was the fourth at 17.4%.

<b>Table 5. How much did you spend on the following items?</b>	<b>Total</b>	<b>Percentage</b>
1. Accommodation	167179	27.67
2. Car Rentals	14188	2.35
3. Food	108329	17.93
4. Beverages	111706	18.49
5. Gifts/souvenirs	2800	0.46
6. City Tours	2650	0.44
7. Fuel	105112	17.40
8. Fees/Admissions	81755	13.53
9. Communication	10456	1.73
<b>TOTAL</b>	<b>604175</b>	<b>100.00</b>
<b>Please write any additional expenses in the spaces below specify, type of expense and amount</b>		
10		
11		
17. How much do you estimate you will spend on the festival in total? (Budget)	<b>648440</b>	

They further indicated that they spent about 14% on admission fees, whereas car rental, communication tools, gifts and city tours spend below 3%, refer to **fig 11** on expenditure.

Fig. 11: How much did you spend on the following items?



## 2.3 BUSINESS

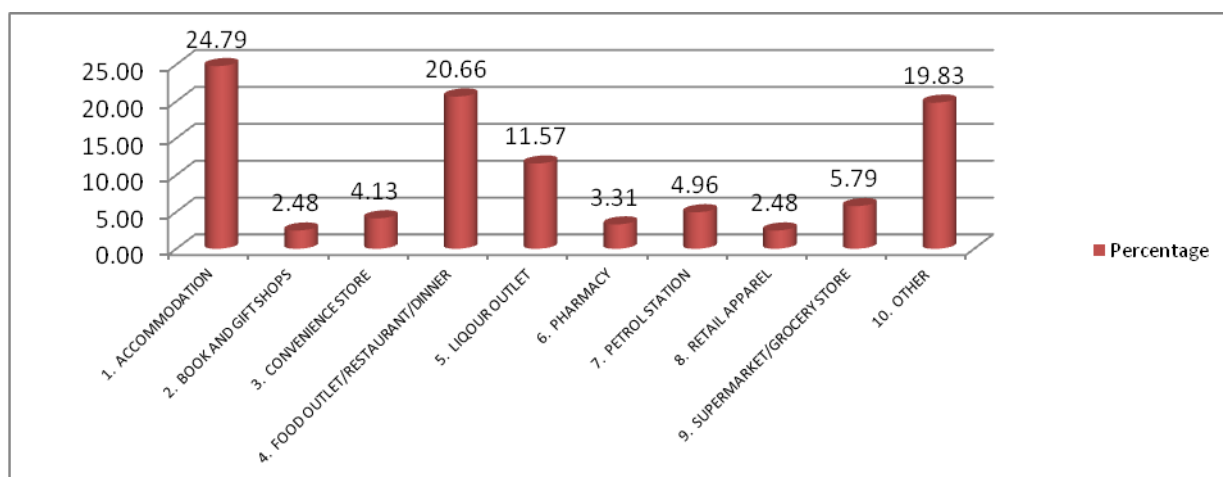
The study also looked at how businesses around Ba-Phalaborwa performed during the festival. In order to get a representative number of businesses, a sample size of 131 businesses were interviewed whereas ten (10) of questionnaires were spoiled. The types of businesses interviewed during and after the festival are listed on **table 16** below.

	<b>TOTAL</b>	<b>Percentage</b>
1. ACCOMMODATION	30	<b>24.79</b>
2. BOOK AND GIFT SHOPS	3	<b>2.48</b>
3. CONVENIENCE STORE	5	<b>4.13</b>
4. FOOD OUTLET/RESTAURANT/DINNER	25	<b>20.66</b>
5. LIQUOR OUTLET	14	<b>11.57</b>
6. PHARMACY	4	<b>3.31</b>
7. PETROL STATION	6	<b>4.96</b>
8. RETAIL APPAREL	3	<b>2.48</b>
9. SUPERMARKET/GROCERY STORE	7	<b>5.79</b>
10. OTHER	24	<b>19.83</b>
	<b>121</b>	<b>100.00</b>

Given the role that accommodation and food outlets play during event, 46% of the sample was allocated to businesses that fell in this category compared to 50% in the study conducted by Human Science Research Council in 2014. **Fig. 12** below shows that 24.8% of these were accommodation, and 20.7% were food outlets businesses with the other businesses allocated as follows, other, 19.8%, liquor outlet (11.6%), supermarket/grocery store (5.8%), petrol station (5%), convenience store (4.1%), pharmacy (3.3%), retail apparel (2.5%), and lastly books and gift shops (2.5%). In comparison with what transpired in the

previous study, there is a slight change in terms of number of visitors who acquired services from these businesses.

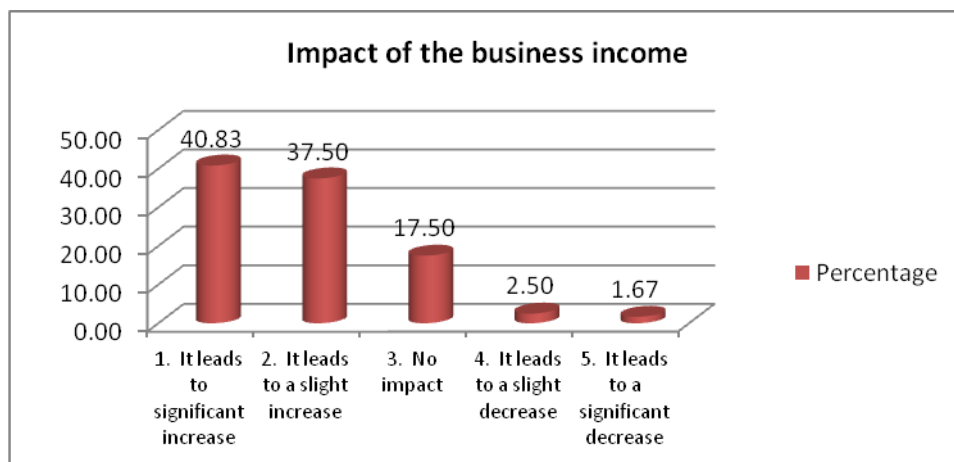
**Fig. 12: What is the type of business?**



<b>Table 7. What impact did the Marula Festival have on the monthly income of your business?</b>	<b>Number</b>	<b>Percentage</b>
1. It leads to significant increase	49	<b>40.83</b>
2. It leads to a slight increase	45	<b>37.50</b>
3. No impact	21	<b>17.50</b>
4. It leads to a slight decrease	3	<b>2.50</b>
5. It leads to a significant decrease	2	<b>1.67</b>
	<b>120</b>	<b>100.00</b>

In terms of the impact of the business monthly income, the respondents indicated that in this year's festival there was a significant increase, which was almost 40.8%, followed by 37.5%. on those indicated that the impact was slight increase, on top of that, there were other respondents who indicated that the festival did not have any impact (17.5%), and only five (5) respondents reported that there was either a slight decrease of 2.5% and a significant decrease of 1.7% as indicated on **table 7** above and clearly outlined on **fig 13** below.

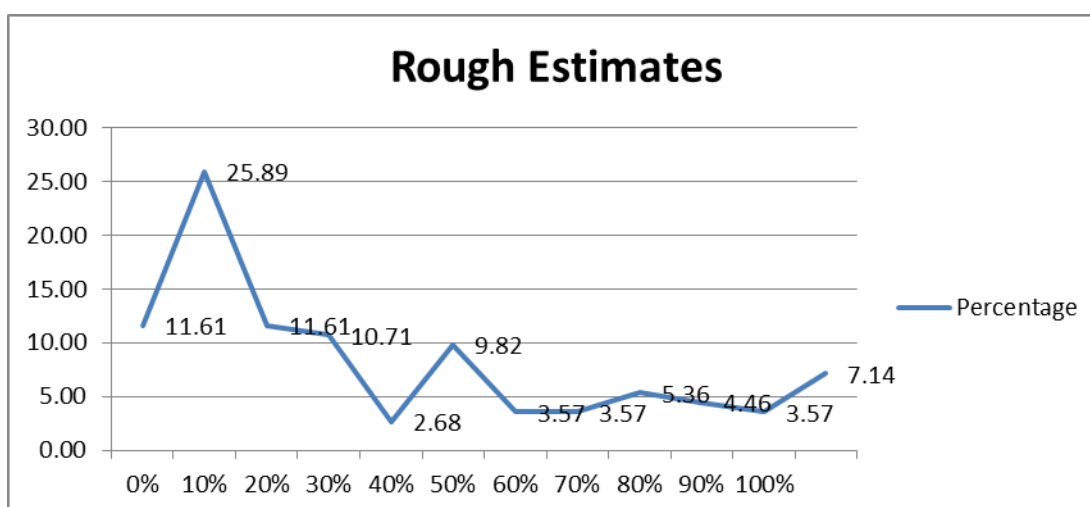
Fig. 13: What impact did the Marula Festival have on the monthly income of your business?



In order to assess the latter, the respondents were asked to quantify the response to the above question by a rough estimates, therefore the responds differ from what indicated on **table 7** above wherein the respondents indicated that there was a significant increase of the business income.

**Graph 2** below twenty-nine respondents estimated that the impact was only 10%, thirteen respondents indicated that there was no impact, whereas another thirteen respondents indicated that there was an impact of 20%, and twelve of them estimated 30% impact. Those who estimated between 50% and 100% are only forty respondents and eight were not sure.

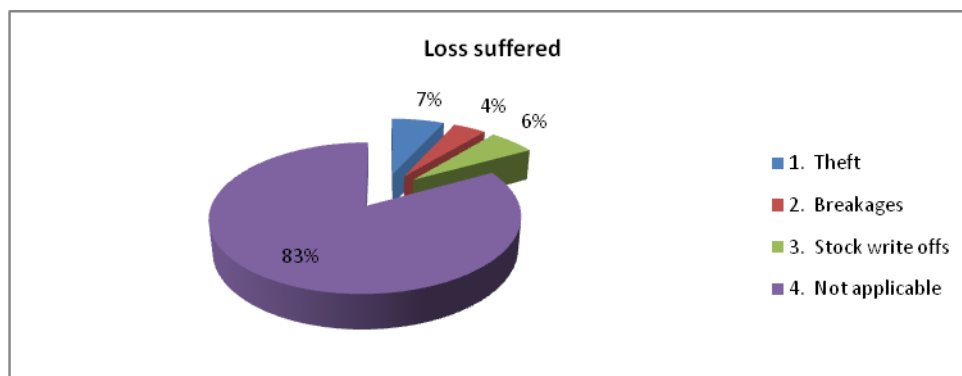
Graph 2: Please quantify your response to the above question by giving a rough estimate. It leads to a \_ %



Businesses were asked whether or not they had suffered any losses due to the festival, 83% of the respondents indicated that it was not applicable, 6.8% of the respondents stated that

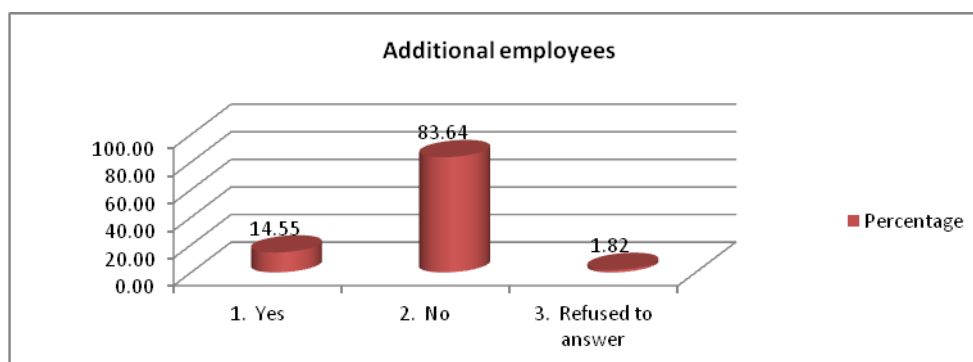
there was theft during the festival, 6.9% of the respondents said that there was stock write-offs and lastly 4.2% of the respondents indicated that there was breakages as outlined on **fig. 14** below.

**Fig. 14: Did you suffer any losses in terms of any of the following?**



The businesses were asked if any additional workers were employed during the festival, only 15% of the respondents indicated that they employed additional workers whereas 84% reported that there were no additional workers. Since the respondents were not forced to respond, about 2% refused to answer the questions, **fig 15** below.

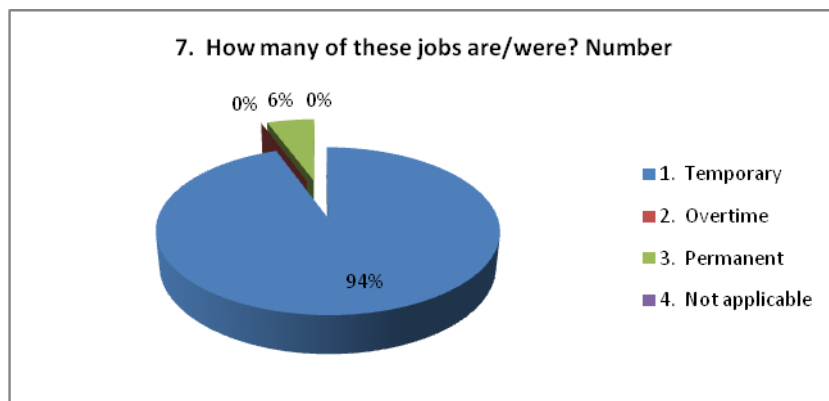
**Fig. 15: Did you employ any additional workers for the festival?**



The respondents indicated on **table 9** below, that only 24 job opportunities were created during the festival.

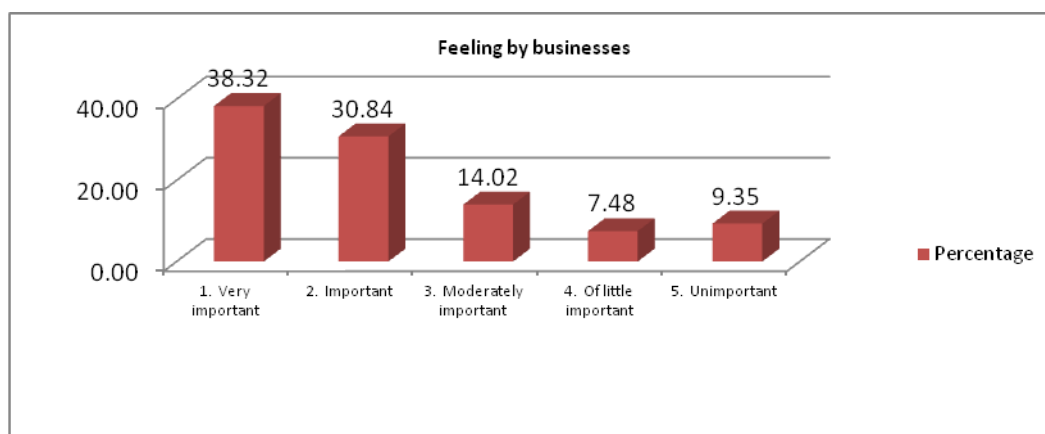
In terms of the number of job opportunities created, it was reported on **fig 16** below that 94% of the respondents had employed temporary workers whereas only 5.6% employed permanent workers. It also reported that there were no overtime workers employed during the festival.

Fig. 16: How many of these jobs are/were?



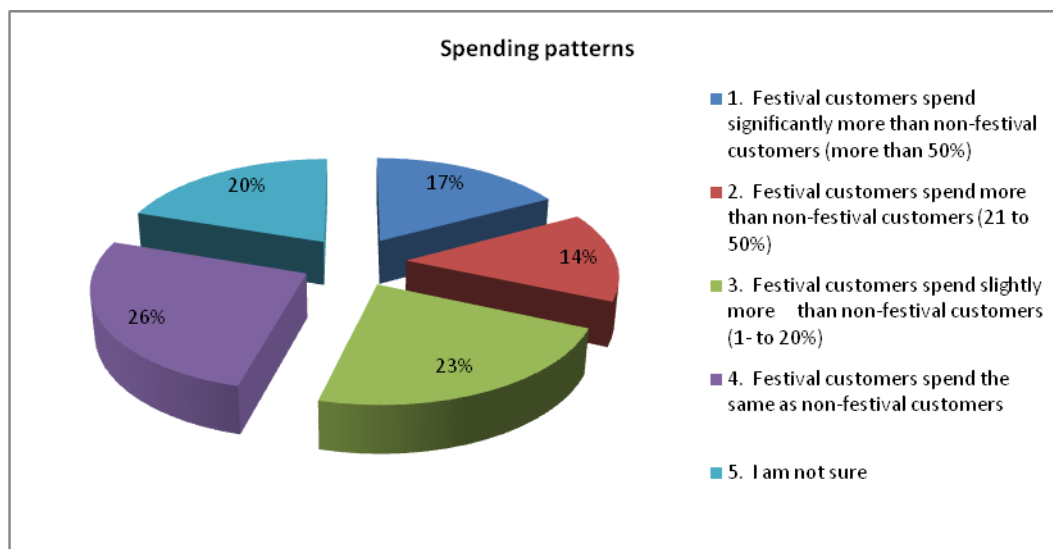
Businesses were asked as to how important are these festivals to them, it is encouraging to report that 38% of the respondents show that the festival was very important and 31% reported that it was important as indicated on **fig. 17** below. 14% of the respondents reported that the festival was moderately important, and 7.5% of the respondents indicated that the festival was of little important and 9.4% said that it was unimportant.

Fig. 17: how important are these festivals



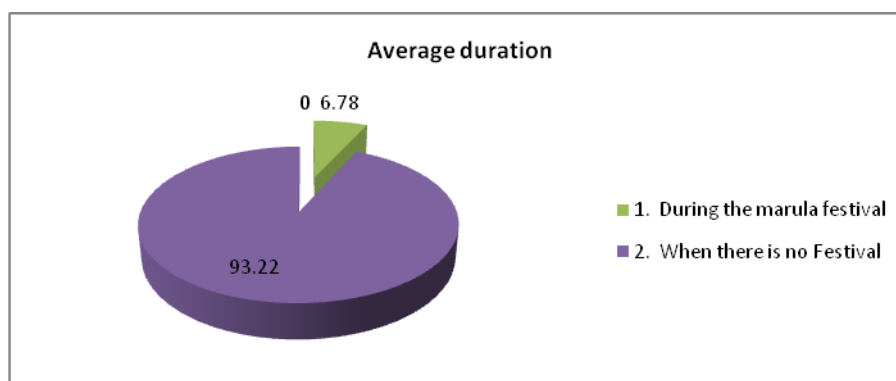
When businesses were asked whether in situations where you can identify customers as those who are here for the festival vs. those who are not, as to which statement would you say best describes the spending patterns of the two types of customers? Businesses show different feeling, in **fig. 18**, majority of the respondents revealed that 28% of the festival customers spent the same as non-festival customers, followed by 22.5% who indicated that the festival customers spend slightly more than non-festival customers, 20% of the respondents were not sure, and 17% of them stated that festival customers spend significantly more than non-festival customer (more than 50%) and lastly it was reported that 14% of the festival customers spend more than the non-festival customers.

**Fig. 18:** In situations where you can identify your customers as those who are here for the festival vs. those who are not, which statement would you say best describes the spending patterns of the two types of customers?



In **fig. 19**, the respondents were asked a question on what the average duration of stay is during the marula festival and when there is no festival. The respondents revealed that customers spend 93% more days than when there is a festival, and if there is no festival they spent only 7%. This support what the respondents indicated on **fig. 6** above that most of the attendees are day visitors.

**Fig 19.** What is the average duration of stay?



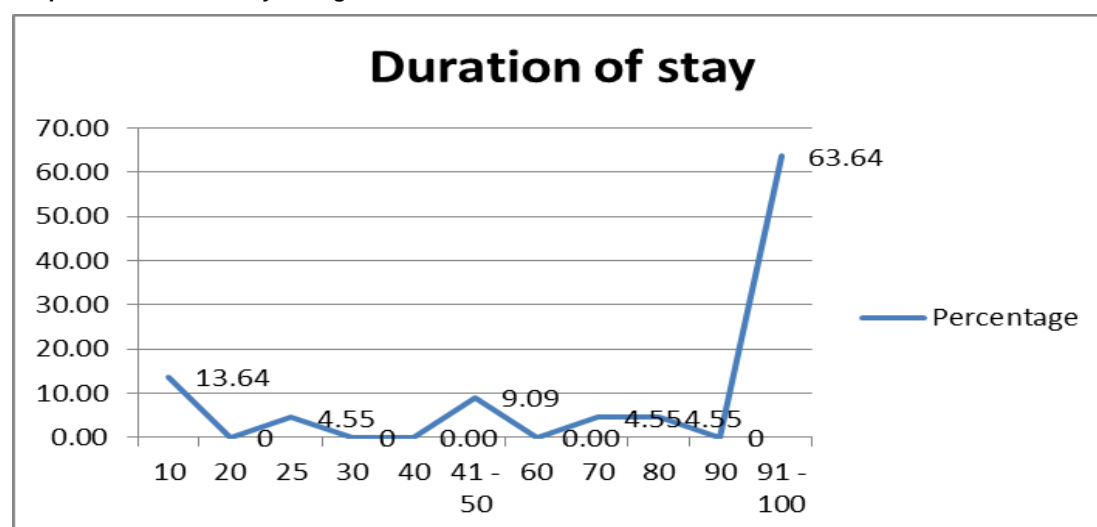
Accommodation outlets indicated on **table 8**, that there is high percentage of bed occupancy rate during marula festival (61.5%) compared to (38.5%) when there is no festival.

**Table 8.** Accommodation

What is your percentage bed occupancy	Number	Percentage
1. During the Marula Festival	1700	61.5
2. When there is no Festival	1065	38.5
<b>Total</b>	<b>2765</b>	<b>100.0</b>

**Graph 3** also support what entails on the previous paragraph.

**Graph 3: Duration of stay during No Festival vs festival**



It was revealed on **Graph 3** above that more visitors spend between 81% – 100% during the festival (64%) compared to 8.7% when there is no festival. It only recorded about 17.4% when there is no festival, which is the highest between 31% and 50%.

## **2. Build up activities and the main event.**

The department has planned various activities which took place before the festival which are listed on **table 10** below. These activities were honoured by the attendance of some politicians, senior government officials and ordinary community members. All build up events were open to the public in the exception of media launch and welcome dinner which were limited to a specific number of delegates. In general, the numbers of attendees in all events were increased.

One of the interesting events which were exceptionally attended was the street parade which also composed of many activities, such as drum majorettes, horse riding, scooters parade, sticks walking, etc.

Table 9: Event activities

Event	Day	No.
Media Launch	6 February 2015	65
Ku Luma Nguva/Go Loma Morula Muti wa Vatsonga)	14 February 2015	500
Marula Festival Street Parade	20 February 2015	1500
Marula Festival Half Marathon	28 February 2015	592
Marula Festival Tourism Career Expo	23-27 February 2015	3974
Marula Festival SMME* Exhibition	24-28 February 2015	44
Marula Festival Fun Fair Park	20-28 February 2015	5300
Marula Festival Golf Challenge	27-28 February 2015	290
Marula Festival Welcome Dinner	27 February 2015	275
Marula Festival Open Air Concert	21-28 February 2015	15600
Build up event: Maruleng	7 February 2015	500
Build up event: Majeje	31 January 2015	450
Build up event: Mashishimale	13 February 2015	300
Build up event: Makhushane	28 February 2015	250
Build up event: Maseke	7 February 2015	400

## INCOME

Particulars	No. of tickets	Price	Total	Sponsorship	Paid to non-local	Paid to local	Total
Gate takings: 21 Feb 2015	3722	R100	<b>R372,200</b>	R2,000,000	R2,500,000	R4,000,000	<b>R6,500,000</b>
Gate takings: 28 Feb 2015	6614	R100	<b>R661,400</b>	R0	R0	R0	<b>R0</b>
Market stalls	44	R500	<b>R22,000</b>	R0	R0	R0	<b>R0</b>
Complementary tickets	3000	R0.00	<b>R0.00</b>	R0	R0	R0	<b>R0</b>
Golf Challenge	0	0	<b>0</b>	R390,000	R0	R0	<b>R0</b>
<b>TOTAL</b>	<b>13380</b>		<b>R1,055,600</b>	<b>R2,390,000</b>	<b>R2,500,000</b>	<b>R4,000,000</b>	<b>R6,500,000</b>

In this year's festival, the number of tickets on kwaito festival had a slight decreased from 3808 to 3722, which is about 2.3%, whereas on jazz festival had significant increased from 3975 to 6614, which is an increase of about 40%. 44 small businesses secured market stalls at R500 per stalls. The total amount generated on market stalls was R22,000. The festival was also honoured by receiving sponsorships from various stakeholders amounted to R6,500,000.00.

### 3. Marula Festival Build up events

The marula festival comprised of many build up activities in some municipalities around Mopani District. These activities were build-up events to inform communities about the festival to come, and to launch or ku luma nguva in traditional authorities. One of those events was held at Ha-Chuene in Capricorn municipality, which was "Ku luma nguva".

Photo by: Ledet Communication Services



What was interesting, more than half of the sponsorship money generated was paid to locals (R4 million) and R2,5 million rands was paid to non-locals. Complementary tickets of 3000 were also issued to some of the VIPs invited for the event, these VIPs inclusive of delegates from other countries, such as Mozambique, Botswana, Germany, Austria, etc.

## EXPENDITURE

Particulars	Amount	Paid to Local	Total
Event Management	R500,000	R0	<b>R500,000</b>
Media Launch	R0	R160,000	<b>R160,000</b>
Welcome Dinner	R0	R290,000	<b>R290,000</b>
<b>TOTAL</b>	<b>R500,000</b>	<b>R450,000</b>	<b>R950,000</b>

The total amount spent on the event management, Media Launch and Welcome Dinner was only R950,000. It excludes costs for artists, golf challenge, which was paid from sponsorships.

### 4.1 Marula Festival Media Launch and Welcome Dinner

The Member of the Executive Council hosted the media launch on the 06<sup>th</sup> February 2015 and welcome dinners which was on the 27<sup>th</sup> February 2015 at Ba-Phalaborwa municipal lapa and Hat and Creek respectively.

Photo by: Ledet Communication Services



The media launch was attended by local and national media houses and invited guests. Media launch was attended by about 65 members, whereas the welcome dinner was attended by 275 delegates.

#### **4.2 Marula Festival Street Parade**

On the 20<sup>th</sup> February 2015, Ba-Phalaborwa town was decorated by various teams of parades who were marching along the streets. Community members joined the street parades till to the Ba-Phalaborwa stadium.

Photo by: Ledet Communication Services



#### **4.3 Limpopo marula industries**

13 cooperatives of the Province processed marula-mukumbi beverage.

Photo by: Ledet Communication



Services

The department bought 12 000 litres of vukanyi/mukumbi beverage from the cooperatives which was distributed to all areas where activities were taking place.

Photo by: Ledet Communication



Services

It was reported that the beverage was well processed, and the consumers/festival attendees enjoyed a lot as per the picture above.

This served as the grand opening of the festival. The numbers of street parade attendees were about 1500 as indicated on **table 10** above. Attached hereunder is the picture for the street parade taken during the day.

#### **4.4 Marula Festival Golf Challenge**

On the 27<sup>th</sup> and 28<sup>th</sup> of February, 275 professional (Pro-Am) and golf sponsors from around the country gathered at Hans Marensky Golf Course to show their performance.

Photo by: Ledet Communication Services



This event was hosted in consultation with PGA,

#### **4.5 Marula Festival Fun Fair**

In order to entertain youth during the entire week of the festival, the services for the fun fair had been secured. Young and old have been attracted by the activities performed and provided at Marula festival fun fair park. An undisclosed amount of money was generated by the service provider.



It was reported that the department has paid for all the services of the fun fair, in order for him to transport his equipment, payment of his staff, accommodation and meals. He was only responsible for providing the service to festival attendees. Ba-Phalaborwa municipality provided electricity for free to the service provider.

#### **4. FINDINGS**

##### **5.1 Visitors:**

- Field reports indicate that one of the serious complaints from festival attendees was the little time was (allowed) provided for the marketing of the event.
- South Africans (98,5%) made up the majority of festival attendees with visitors from the following countries accounting for the remaining 1.5%, Germany, Australia, Slovenia and other African countries such as Mozambique.
- At a provincial level 83.2% of the respondents, on average, were from Limpopo, whilst 8.5% were from Gauteng and 5% were from Mpumalanga.
- The overall gender ratio of attendees to the Marula Festival between males and females were 59% and 41% respectively.
- When it comes to the age group of festival attendees who had a decision in the spending of their group, the festival largely attracted visitors between the ages of 25 and 44 years old with an overall bias towards the younger 18 to 25 years cohort.
- Racially the festival seems to attract largely blacks (93%) while whites and coloured share 7%.
- Most of the non-local festival attendees stayed with others (31.3%), staying with friends (20.5%), self-catering (15.5%) lodges type of accommodation (11.1%).
- The majority, (37.6%), of local residence found out about the Marula festival through their local radio station(s), whilst word of mouth was the main communication channel through which non-local visitors found out about the event (29.4%).
- Marula festival fun fair attracted a lot of people, especially youth and generates a lot of money.

- Ledet and Ba-Phalaborwa municipality provide venue and transport to Marula fun fair service provider for free.
- Some attendees indicated that the festival entrance fees be reduced to attract more youth.

## 5.2 Businesses

- 40.8% of the businesses reported that the Marula festival had a positive impact on their monthly income, whilst 37,5% reported that the event had *'slight and 17.5% indicated that there is no impact.*
- Only 14.6% of the sampled businesses reported hiring additional workers for the Marula festival, whereas 83.6% reported that they did not hire additional workers.
- Of the number of workers hired, only 6% are permanent and 94% of them are temporary workers.
- As expected businesses such as pharmacies, retail apparel, liquor outlets and supermarkets were clustered in the medium to very high leakage range. The possibility of reducing this leakage is assessed in the report.
- Some of the business people indicated that the festival make noise, burglaries during the festival and the crime increase due to teenage(rs) abuse of alcohol
- Festivals should take place at the end of the month.
- Increase the number of market stalls and educate business people about the festival or involve them in the planning stage.
- Temporary licence is too high, and it needs to be relooked at.
- It was found that 61.5% bed occupancy rates compared to 38.5% during non-festival.

## 5. RECOMMENDATIONS

Based on the above key findings this section explores some of the policy recommendations that are geared at assisting to enhance the economic impact of the Marula Festival.

- Increase budget for the festival
- Preparation for the festival to commence in the first quarter of the financial year to secure the services of some of the professional participants, such as 4x4 challenge participants, golfers, athletes (marathon), artists, etc.

- In as far as efforts of trying to enhance impact of an event in the Ba-Phalaborwa are concerned; efforts should be made to try and shift the sourcing of inputs by high leakage businesses to the local economy as this would significantly amplify spending in Ba-Phalaborwa as it will allow for capturing successive rounds of spending (indirect and induced impacts).
- Duration of stay is important as it plays a very important role in determining the size of the economic impact on the local economy. Generally, duration of stay is highly influenced by the design of the programme of events in terms of the spread of crowd pulling activities over the total number of days of the festival. In the case of Marula the apparent start and end point clustering of key events in the opening and closing weekends has the potential of reducing the duration of stay and might encourage day visitors.
- More attention needs to be paid to the marketing of the event which seems to be a key area of concern. This was also accompanied by disappointments around the apparent lack of and non-adherence to the programme that had been circulated prior to the event. Event organisers need to take these complaints seriously as the heart and soul of a festival is essentially defined by the programme of activities. The fact that non-local visitors found out about the event through word of mouth indicates that there is a possibility of attracting a larger audience by exploiting other marketing channels.
- Event organisers should focus on the lowly rated areas to ensure better festival organisation in future.
- One way of enhancing the tourism inducing effect of the festival is to design a programme of events that would encourage festival attendees to stay longer within the local economy.
- Income generated out of Marula festival fun fair park is shared between the department, municipality and the service provider.
- Include whites' musicians on the list of artists.
- Take the festival to other areas such as Lulekani and Namakgale.
- Security to be increased in town.
- Organize pre-bash activities at other areas, e.g. rural areas.
- To advertise tourism businesses on the stalls for free.

## 6. CONCLUSIONS

In conclusion, it was reported that the number of attendees in the annual Marula Festival event held at Ba-Phalaborwa Municipality has increased by almost 50% on the Jazz festival day. To make the festival more attractive, the LOC must ensure that the recommendations of the study should be implemented.

The study focuses primarily on the economic impact assessment of the Marula Festival to the tourism industry. The greatest value of the Marula Festival to the mukumbi industry, however, would be to provide an advertising platform to market marula products. In its current form, this is simply not viable. Mukumbi is not available from the brewers out of season since there is no current means of bottling or canning the product within the cooperatives. Also, there is no value chain in place. Justifying the Festival as a means of furthering the mukumbi industry is thus currently not tenable. Indeed, making the industry rely on government for a great deal of its turnover is likely to hinder cooperatives with regard to the part they play in the provincial economy as they do not learn business practices in the process.

Comparisons between the Marula Festival and other liquor-based industries and events such as the Wiesen Oktoberfest and Cape Wine Route are currently emerging. Both the Oktoberfest and the Cape Wine Routes rely on an established, efficient industry with high production and a broad value chain from production to retail. In both cases, products are available widely and throughout the year and producers are in a position to provide sponsorship. In the case of the Mukumbi Festival, the industry is not fully operational; it does not have high production or a broad-based value chain and is certainly not in a position to sponsor events. As is indicated by the results of this study, the Limpopo mukumbi industry is faltering and is to a large degree dependent on government sponsorship associated with the Marula Festival. Until such time as the industry itself becomes a self-sufficient, successful business entity in its own right, strategies employed in the operation of Wiesen and the Cape Wine Routes are unlikely to generate the same kind of knock-on business.

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LIMPOPO

PROVINCIAL GOVERNMENT  
REPUBLIC OF SOUTH AFRICA

DEPARTMENT OF  
ECONOMIC DEVELOPMENT, ENVIRONMENT & TOURISM

## Appendix 1

# VISITOR QUESTIONNAIRE FOR MARULA FESTIVAL 2015

### INSTRUCTIONS TO ENUMERATOR:

We are only interested in people who are attending the festival. Do not record any responses from people who are not attending the festival.

My name is

I am from the Department of Economic Development, Environment and Tourism /Limpopo Tourism Agency and I am conducting a study on the **Marula Arts and Cultural Festival**. The reason for conducting the study arises from the fact that there is a need at the provincial level to gain a better understanding of the contribution of **cultural events** to various economic indicators, such as, employment, and local economic linkages to growth. More information about cultural festivals is needed for better event planning.

### ADMINISTRATIVE INFORMATION:

Name of Event (Ku luma Nguva (Build Up) Kwaito,  
Gospel / Jazz Festival)



## SECTION A: DEMOGRAPHICS

1.	<b>INSTRUCTIONS TO ENUMERATOR:</b> We are only interested in people who are attending the festival. Do not record any responses from people who are not attending the festival. <b>Is the Marula Festival your primary reason for being in Phalaborwa today?</b> 1 = YES 2 = NO If YES, proceed with interview. If NO, <b>STOP INTERVIEW</b> and look for next respondent.								<input type="checkbox"/> 1 <input type="checkbox"/> 2														
2.	<b>Town/City</b> <input type="text"/>																						
3.	Ask if respondent is from South Africa. <b>Province Of Origin:</b> Tick One																						
	Limpopo	Mpumalanga	Gauteng	North West	Free State	Kwazulu Natal	Western Cape	Northern Cape	Eastern Cape														
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>														
4.	If respondent is not from South Africa. <b>Country:</b> <input type="text"/>																						
5.	<b>Gender of respondent.</b> <table border="1"> <tr> <td>Male</td> <td><input type="checkbox"/></td> <td>Female</td> <td><input type="checkbox"/></td> </tr> </table>								Male	<input type="checkbox"/>	Female	<input type="checkbox"/>											
Male	<input type="checkbox"/>	Female	<input type="checkbox"/>																				
6.	<b>Which age category do you fall under?</b> <table border="1"> <tr> <td>16-18</td> <td><input type="checkbox"/></td> <td>19-25</td> <td><input type="checkbox"/></td> <td>25-34</td> <td><input type="checkbox"/></td> <td>35-44</td> <td><input type="checkbox"/></td> <td>45-54</td> <td><input type="checkbox"/></td> <td>55-64</td> <td><input type="checkbox"/></td> <td>65+</td> <td><input type="checkbox"/></td> </tr> </table>								16-18	<input type="checkbox"/>	19-25	<input type="checkbox"/>	25-34	<input type="checkbox"/>	35-44	<input type="checkbox"/>	45-54	<input type="checkbox"/>	55-64	<input type="checkbox"/>	65+	<input type="checkbox"/>	
16-18	<input type="checkbox"/>	19-25	<input type="checkbox"/>	25-34	<input type="checkbox"/>	35-44	<input type="checkbox"/>	45-54	<input type="checkbox"/>	55-64	<input type="checkbox"/>	65+	<input type="checkbox"/>										
7.	<b>What population group do you belong to?</b> <table border="1"> <tr> <td>African/Black</td> <td><input type="checkbox"/></td> <td>Coloured</td> <td><input type="checkbox"/></td> <td>Indian/Asian</td> <td><input type="checkbox"/></td> <td>White</td> <td><input type="checkbox"/></td> <td>Other: Please Specify</td> <td><input type="text"/></td> </tr> </table>								African/Black	<input type="checkbox"/>	Coloured	<input type="checkbox"/>	Indian/Asian	<input type="checkbox"/>	White	<input type="checkbox"/>	Other: Please Specify	<input type="text"/>					
African/Black	<input type="checkbox"/>	Coloured	<input type="checkbox"/>	Indian/Asian	<input type="checkbox"/>	White	<input type="checkbox"/>	Other: Please Specify	<input type="text"/>														

## SECTION B: FESTIVAL ATTENDANCE

8.	<b>Have you attended the Marula Festival before?</b> 1 = YES 2 = NO	<input type="checkbox"/> 1 <input type="checkbox"/> 2
9.	Ask if respondent is a visitor from outside the province. <b>How long are you staying in Phalaborwa?</b> 1 = Day Visitor 2 = 1 - 3 nights 3 = More than 4 nights 4 = I don't know	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4
10.	<b>Are you attending the festival by yourself or are you traveling with your family or are you part of a group?</b> 1 = Alone 2 = Traveling with family/group	<input type="checkbox"/> 1 <input type="checkbox"/> 2

11.	How many people are in your family/ group? <input type="text"/> <input type="text"/>	
12.	<b>How did you find out about the Marula festival?</b> 1 = Brochure 2 = Internet 3 = Local radio station 4 = Posters & flyers 5 = Social Media (Facebook/Twitter) 6 = Word of mouth 7 = Other, please specify, _____	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7
13.	<b>How far have you travelled to visit the Marula festival?</b> 1 = Less than 20km 2 = 21-50km 3 = 51-100km 4 = 101-200km 5 = 201-400KM 6 = 401-700km 7 = 701-1000km 8 = More than 1000km 9 = I don't know	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9
14.	<b>How many festivals have you attended in the past 5 years in Limpopo?</b> 1 = None 2 = One 3 = Two 4 = Three 5 = Four 6 = Five 7 = More than five	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7
<b>SECTION C: INFORMATION ON EXPENDITURE</b>		
15.	<b>What type of accommodation are you using whilst you are here in Phalaborwa attending the festival?</b> 1 = Backpacker/Hostel 2 = Bed & Breakfast (B&B) 3 = Boutique Hotel 4 = Caravans/Camping Site 5 = Chalets 6 = Guesthouse 7 = Hotel 8 = Lodge 9 = Motel 10 = Resort 11 = Self-catering 12 = Staying with friends/relatives 13 = Other, please specify, _____	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> 13
16.	<b>How much did you spend on the following items?</b>	

DAILY EXPENDITURE ITEM (EXPENSES INCURRED IN PHALABORWA ONLY)		AMOUNT (RAND'S)							
1 =	Accommodation	R							
2 =	Car Rentals (If any) (Exclude if car was hired outside Phalaborwa)	R							
3 =	Food	R							
4 =	Beverages	R							
5 =	Gifts/souvenirs (Only purchases related to the Festival Craft Market)	R							
6 =	City Tours (Tours to visit attractions in the city)	R							
7 =	Fuel (Costs related to the event purchased in Phalaborwa)	R							
8 =	Fees/Admissions (To festival events )	R							
9 =	Communication (Only airtime purchased in Phalaborwa)	R							
Please write any additional expenses in the spaces below specify, type of expense and amount									
10 =		R							
11 =		R							
12 =		R							
13 =		R							
17.	How much do you estimate you will spend on the festival in total? (This amount should be the respondent's <b>TOTAL BUDGET</b> for the festival incurred in Phalaborwa for the group/family.)								
	<div>R</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div>								

## Appendix 2

### BUSINESS QUESTIONNAIRE FOR MARULA FESTIVAL 2015

#### INSTRUCTIONS TO ENUMERATOR:

We are only interested in people who are attending the festival.  
Do not record any responses from people who are not attending the festival.

I am from the Department of Economic Development, Environment and Tourism/Limpopo Tourism Agency and I am conducting a study on the economic impact of the **Marula Festival**.

The reason for conducting the study is to evaluate the impact of the contribution of the Marula Festival to the local economy between 2014 and 2015, through a number of economic indicators, such as, employment. As you know businesses play a very important role in serving both local residents and visitors during these events. As such we would greatly appreciate it if you could respond to a few questions regarding the impact of the festival on your business.

#### ADMINISTRATIVE INFORMATION:

Interviewer Name:

Date of Interview:

Venue of interview:


1	<b>What is the type of business?</b> <input type="checkbox"/> 1 = Accommodation <input type="checkbox"/> 4 = Food Outlet/Restaurant/Diner <input type="checkbox"/> 7 = Petrol Station <input type="checkbox"/> 2 = Book and Gift Shops <input type="checkbox"/> 5 = Liquor Outlet <input type="checkbox"/> 8 = Retail Apparel <input type="checkbox"/> 3 = Convenience store <input type="checkbox"/> 6 = Pharmacy <input type="checkbox"/> 9 = Supermarket/ Grocery store <input type="checkbox"/> 10 = Other, please specify, _____	
2	<b>What impact did the Marula festival have on the monthly income of your business?</b> <input type="checkbox"/> 1 = It leads to a <b>significant increase</b> <input type="checkbox"/> 2 = It leads to a <b>slight increase</b> <input type="checkbox"/> 3 = No impact <input type="checkbox"/> 4 = It leads to a <b>slight decrease</b> <input type="checkbox"/> 5 = It leads to a <b>significant decrease</b>	
3	<b>Please quantify your response to the above question by giving a rough estimate. It leads to a ___% increase or decrease in the businesses monthly income.</b> <input type="checkbox"/> 1 = 0% <input type="checkbox"/> 2 = 10% <input type="checkbox"/> 3 = 20% <input type="checkbox"/> 4 = 30% <input type="checkbox"/> 5 = 40% <input type="checkbox"/> 6 = 50% <input type="checkbox"/> 7 = 60% <input type="checkbox"/> 8 = 70% <input type="checkbox"/> 9 = 80% <input type="checkbox"/> 10 = 90% <input type="checkbox"/> 11 = 100% <input type="checkbox"/> 12 = Am not sure	
4	<b>Did you suffer any losses in terms of any of the following? (Tick only one)</b> <input type="checkbox"/> 1 = Theft <input type="checkbox"/> 2 = Breakages <input type="checkbox"/> 3 = Stock write offs <input type="checkbox"/> 4 = Not Applicable	
5	<b>Did you employ any additional workers for the festival?</b> <input type="checkbox"/> 1 = Yes <input type="checkbox"/> 2 = No <input type="checkbox"/> 3 = Refused to answer	
6	Ask if YES in previous question: <b>How many additional job opportunities did your business create as a result of the Marula festival?</b> <span style="border: 1px solid black; display: inline-block; width: 50px; height: 15px; vertical-align: middle;"></span>	
7	Ask if YES in previous question: <b>How many of these jobs are/were _____?</b> (Record responses in spaces provided?) <input type="checkbox"/> 1 = Temporary <span style="border: 1px solid black; display: inline-block; width: 50px; height: 15px; vertical-align: middle;"></span> <input type="checkbox"/> 2 = Overtime <span style="border: 1px solid black; display: inline-block; width: 50px; height: 15px; vertical-align: middle;"></span> <input type="checkbox"/> 3 = Permanent <span style="border: 1px solid black; display: inline-block; width: 50px; height: 15px; vertical-align: middle;"></span> <input type="checkbox"/> 4 = Not applicable <span style="border: 1px solid black; display: inline-block; width: 50px; height: 15px; vertical-align: middle;"></span>	
8	<b>How important are these festivals to your business?</b> <input type="checkbox"/> 1 = Very Important <input type="checkbox"/> 2 = Important <input type="checkbox"/> 3 = Moderately Important <input type="checkbox"/> 4 = Of Little Importance <input type="checkbox"/> 5 = Unimportant	
9	<b>In situations where you can identify your customers as those who are here for the festival vs. those who are not, which statement would you say best describes the spending patterns of the two types of customers?</b> (Ask the respondent to compare spending patterns during festivals against spending patterns when there is no festival.) <input type="checkbox"/> 1 = Festival customers spend significantly more than non-festival customers [more than 50%] <input type="checkbox"/> 2 = Festival customers spend more than non-festival customers [21 to 50% more] <input type="checkbox"/> 3 = Festival customers spend slightly more than non-festival customers [10 to 20% more] <input type="checkbox"/> 4 = Festival customers spend the same as non-festival customers <input type="checkbox"/> 5 = I am not sure	
10	<b>ACCOMMODATION ONLY: What is the average duration of stay _____?</b> (Number of nights, if it is the same record same number in both spaces) a. During the Marula festival <span style="border: 1px solid black; display: inline-block; width: 50px; height: 15px; vertical-align: middle;"></span> b. When there is no festival <span style="border: 1px solid black; display: inline-block; width: 50px; height: 15px; vertical-align: middle;"></span>	<b>11.ACCOMMODATION ONLY: What is your percentage bed occupancy _____?</b> (If it is the same record same number in both spaces) a. During the Marula festival <span style="border: 1px solid black; display: inline-block; width: 50px; height: 15px; vertical-align: middle;"></span> % b. When there is no festival <span style="border: 1px solid black; display: inline-block; width: 50px; height: 15px; vertical-align: middle;"></span> %
12	<b>In your opinion, what should be done to enhance the impact of the festival for businesses in the local economy?</b> <div style="border: 1px solid black; height: 30px; width: 100%;"></div> <div style="border: 1px solid black; height: 30px; width: 100%;"></div>	

**DECLARATION BY INTERVIEWER TO BE DONE AFTER THE INTERVIEW**

I declare that I have checked my work regarding the above instrument and that I am confident that it truly reflects the information given by the respondent and that the quality of my work is the best possible.

Date **D D M M**

Interviewer Name

Signature

End of interview. Thank you for your participation.

