



Results of the 2008
Multicultural Festival
Spectator Survey

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Executive Summary

The 2008 Multicultural Festival Survey

This report presents results of a survey of spectators at the 2008 Multicultural Festival. On key measures, results are compared with a similar survey conducted in 2006 in relation to the festival of that year.

Trained interviewers conducted the survey with 162 spectators at the Food and Dance Spectacular. Of those approached to participate in the survey, 86% of agreed to participate.

Satisfaction with the Festival

Almost all of those interviewed, 97% were either satisfied or very satisfied with the Multicultural Festival overall. This was an increase of 17% over the satisfaction of spectators recorded at the 2006 Festival. In addition, of spectators at the 2008 Festival:

- 92% were likely or very likely to attend again in 2009; and
- 99% would recommend the Festival to a friend.

As the spectator survey was undertaken at the Food and Dance Spectacular, food was most frequently mentioned as the thing that people liked most about the Festival. Spectators liked the variety and diversity of food, entertainment and cultures present at the Festival. However spectators also liked the opportunity the Festival provided for the Canberra community, and all of its diverse cultural groups, to come together in a very positive atmosphere. A sense of community pride was also evident from spectator responses.

While the atmosphere received a high satisfaction rating, with 98% satisfied or very satisfied with this aspect of the Festival, only 51% were satisfied or very satisfied with the Festival Program. The lack of availability of the program of events or information about the stalls, activities or events on during the Food and Dance Spectacular resulted in this lower satisfaction rating. Eighty one (81%) of spectators were satisfied with the value for money of the Festival although some suggested that food could be provided in smaller portions that were cheaper and allowed them to sample more.

Festival improvements

While crowds added to the positive atmosphere of the Festival, overcrowding at the Food and Dance Spectacular was an area for improvement identified by 10% of spectators. However crowding problems largely arose between 12:00pm and 2:00pm and 4:00pm and 6:00pm. The need for more seats and rest areas, more parking, more toilets, and more frequent rubbish disposal were associated issues raised by 5% or fewer spectators.

Access to and participation in the Festival was reported to be difficult for the mobility impaired.

Event promotion

Nine per cent of spectators (9%) felt that more advertising was needed for the Festival, both interstate and locally. Just 20% of spectators heard about the Festival for the first time through television, radio or newspapers, while almost two thirds (65%) knew about the Festival from word of mouth or previous knowledge. Interstate and overseas spectators were largely not aware of the Festival prior to their visit to Canberra (62% did not know it was on before they came to Canberra).

Sponsor awareness

Eight of the 26 sponsors were named by spectators, including the Tradies Club and the ABC (each identified by one in twenty spectators), and Fyshwich Fresh Food Markets, ActewAGL, and the ACT Government (each identified by around one in ten spectators or more).

While this may appear to be a relatively low level of spectator awareness of the Festival's sponsors, it must be noted that spectators were asked to recall sponsors without any recall cues. The recall rates for those who were identified by spectators are similar to recall rates observed for spectators in studies of major sponsors of Australian sporting events.

Festival attendance

Spectators attended the Festival for an average of two days, although close to half (47%) were attending for one day only. Family groups made up just over a third of travel parties to the Festival (36%), with groups of friends (31%) and couples (27%) making up the bulk of spectators. Spectators of all ages were well represented at the Festival but over one third (36%) were between 25 and 34 years.

Contribution to tourism

While most spectators at the Festival were residents of the ACT, 15% were visitors from interstate and 1% were from overseas. Two per cent of spectators came to Canberra specifically for the Festival and a further 1% extended their stay to attend the Festival.

The sample numbers are very small against these measures, thus limiting the reliability of conclusions drawn from the figures. Estimates of the contribution of the Festival to tourism are therefore only indicative. If the total attendance at the Festival were 200,000, then it could be estimated that 3%, or in the order of 6,000 spectators, were tourists brought to Canberra or encouraged to stay longer in Canberra due to the Festival.

Contribution to the ACT economy

Nineteen per cent of interstate or overseas spectators stayed in hotels, motels or self-contained apartments. A further 15% stayed in Youth Hostels, backpackers or caravan parks.

Although many interstate and overseas spectators stayed at the home of friends or family while in Canberra (57%), average spending for these spectators was \$294. This figure included accommodation, food, entertainment, transport, personal services and other expenses whilst at the Festival.

Noting that the small number of cases limits the extent to which generalisations can be made about the figures, estimates of the contribution of the Festival to the ACT economy are only indicative. Based on the general estimate of 200,000 spectators attending the Festival overall, tourists who came to the ACT or extended their stay because of the Festival may have directly contributed in the order of \$1.8 million to the ACT economy.

Recommendations

Feedback from spectators points to the need for more information about the Festival program. Initiatives such as making programs available at all venues would not only resolve the spectators' need for information but would also improve spectators' sponsor awareness.

Advertising interstate and more frequently in the lead up to the Festival is likely to increase Festival attendance.

The following is a summary of useful additional spectator feedback on how the Festival could be improved:

- the need for additional crowding reduction measures. This was particularly an issue at peak time during the Food and Dance Spectacular which could be said to extend between 12:00pm and 7:00pm. Additional shaded seating and tables away from main walkways are one method of achieving this;
- improved disability access or clear information about disability access;
- a map of stalls at the Food and Dance Spectacular;
- smaller sample size portions of food available at food stalls;
- more seating at stages;
- additional toilet facilities;
- improved rubbish bin availability and rubbish removal;
- a dedicated children's activities area at the Food and Dance Spectacular and more activities for children on weekdays;
- availability of Festival programs in newspapers or letterboxes just prior to the event.

The location of the Food and Dance Spectacular in the centre of the city was noted as being something very positive for Canberra in bringing the city centre to life and creating a sense of community in the heart of Canberra. It was also seen as enhancing the Festival's accessibility. While space constraints present some

challenges, there are clearly strong positive reasons for keeping the Festival, and in particular the Food and Dance Spectacular in the centre of the city.

The availability of alcohol at the Food and Dance Spectacular received a mixed response but was largely seen as a positive aspect of the Festival, particularly the wide variety of international beers available. Those spectators who commented negatively in relation to the availability of alcohol expressed concerns about the potential for trouble, however there were no reports of antisocial behaviour. Rather it was noted that people were “well behaved”. It appears that the availability of alcohol in the context of a Festival event more focused on food and entertainment has supported the responsible consumption of alcohol.

The ability to draw conclusions about the contribution of the Festival to the economy would be strengthened by undertaking spectator counts at events and by restricting the full survey to an identified sub-sample of spectators who had travelled to Canberra from interstate or overseas.

Introduction

The 2008 Multicultural Festival

The National Multicultural Festival 2008 was held over the period 8-15 February 2008. It included free and ticketed events by the lakes and in theatres, community centres, clubs and galleries. Free entertainment was provided every evening and weekends, and during lunch times on week days. This included music, dance, theatre and comedy. Weekend events included stalls, activities and entertainment along the central city walkways, and included the Food and Dance Spectacular, Greek Glendi and Carnivale!.

Tickets for events were purchased from the individual venues with contact and pricing details available in the program. Spectators were able to purchase a Festival Card which provided discounts at all ticketed events. Discounts were available for concession card holders and Festival Card holders.

There were road closures on London Circuit for the Festival launch, on the evening of February 8 and both Saturdays. Crowds at the festival were expected to put limitations on parking availability in the city.

Assessment of Festival success

To assess the success of the 2008 Multicultural Festival, the Office of Multicultural Affairs sought the assistance of the Department of Disability, Housing and Community Services (DHCS) Data and Research team to assist the Office to undertake a survey of spectators attending the Festival and a survey of participants (that is, groups or individuals who contributed to the Festival).

This report provides an analysis of the results of the survey of Festival spectators. A separate report will provide the results of the survey of Festival participants.

Method

Survey development

The 2008 Multicultural Festival spectator survey was designed to capture a number of aspects of the event including:

- demographic details of spectators;
- spectators satisfaction with the event, and with various aspects of it;
- how spectators had found out about the event;
- spectators' awareness of sponsors;
- an assessment of aspects of the economic contribution of the festival through measurement of spectator spending; and
- the contribution of the Festival to tourism.

Questions used in a previous 2006 survey were replicated in the 2008 survey to enable comparison of the success of the 2008 event against the 2006 benchmark results.

The spectator survey form is found at Appendix B.

Data collection

The survey was conducted by face-to-face interviews with people attending the Food and Dance Spectacular, a signature event held on Saturday 9 February.

Between 11am to 2pm and 4pm to 7pm, four trained interviewers provided by SurveyTalk approached randomly selected spectators in the City Walk/Garema place area where the Food and Dance Spectacular was held.

Interviewers were asked to complete as many interviews as possible within the available time from a representative sample of spectators, using the survey form is found at Appendix B and the prompt card at Appendix C. The time of interview was recorded on the survey form.

Interviewers were also asked to record refusals to participate and to attempt to elicit information on whether the spectator was from the ACT or interstate.

Completed survey forms were marked with an interviewer identification code and delivered to DHCS Data and Research.

Response rate

Interviewers approached a total of 189 Festival spectators. A total of 162 surveys were completed. The response rate was therefore 86%.

The total number of spectators attending the Festival is not known, so it is therefore not possible to estimate what proportion of the population of spectators this sample represents and hence the margin of error for the results.

Comparison with the 2006 Festival survey results

Some caution is required in comparing the results of the 2008 spectator survey and the 2006 survey.

In 2008 participants were recruited at one event only – the Food and Dance Spectacular, an event known to be the most popular of the Festival as indicated by attendance numbers. In 2006 participants were recruited at nine events, one of which was the Food and Dance Spectacular.

The 2006 survey was undertaken by soliciting email addresses from consenting participants and sending an electronic survey to be completed by spectators after the event. In contrast, the 2008 survey was undertaken on the spot at the Festival event with interviewers leading participants through the survey questions. While this 2006 survey method allowed for a larger sample to be gathered (including the option of reminder emails), it was restricted to spectators who were willing and able to communicate by email.

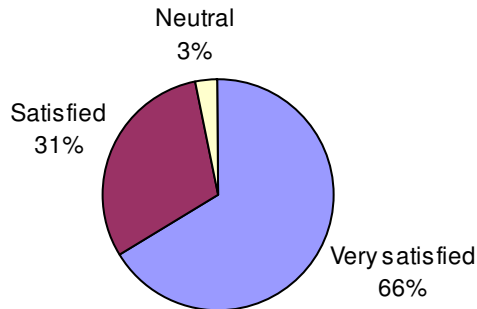
The response rate was higher for the 2008 face-to-face interviews, it is possible that responses were recorded more accurately as interviewers assisted participants with the survey, and the perceptions and information recorded may have been more accurate as it was collected during the activity rather than some time after the end of the event. Conversely, it is also possible that information that required more careful calculation (such as expenditure data) may have been less accurately reported in the busy context of face to face interviews at the event. In addition, the presence or absence of an interviewer may influence the way that participants respond in terms of the interaction with the interviewer contributing to satisfaction or dissatisfaction with the event. Kiesler and Sproull (1986) provide further information about the effect of electronic surveys on participant responses.

Results

Satisfaction

Using a scale from 1 (very dissatisfied) to 5 (very satisfied), survey participants were asked to rate their overall satisfaction with the Festival. Using this scale, 97% of spectators reported that they were either very satisfied (66%) or satisfied (31%) with the event overall. Just 3% of interviewees gave a 'neutral' response (see Figure 1). This is a substantial improvement over the 2006 result when overall satisfaction with the event was 80%.

Figure 1. Overall spectator satisfaction with the 2008 Multicultural Festival

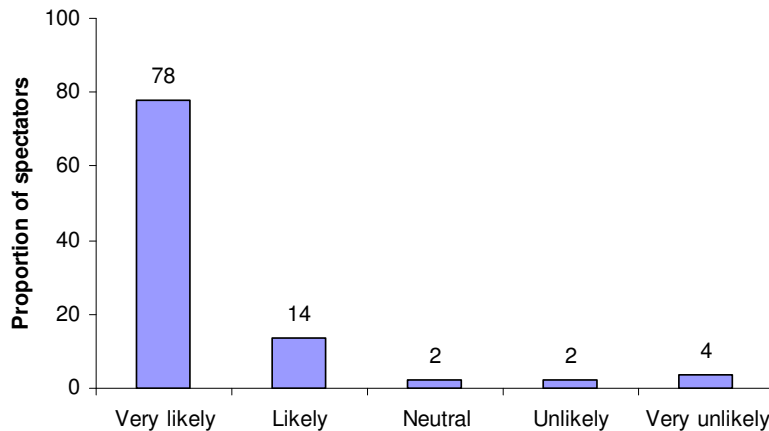


Two other measures of the level of spectator satisfaction are the likelihood that they would attend the Festival again the following year and whether or not they would recommend the Festival to a friend.

Ninety nine per cent (99%) of respondents said that they would recommend the Multicultural Festival to a friend. In 2006, 87% said it was likely or very likely that they would recommend the Festival to others.

Figure 2 shows that 92% of the spectators interviewed thought it was likely or very likely that they would attend the Festival again next year. This is an increase of 7% over the result for 2006.

Figure 2. Reported likelihood of spectators attending the Multicultural Festival next year



Understanding the satisfaction ratings

Spectators were asked to describe, in their own words, what they liked most about the Multicultural Festival. Table 1 provides a count of replies categorised into common themes.

Table 1. What did you like most about the Multicultural Festival: Spectator responses

	Number	Proportion of all respondents
Food	104	64%
Culture	54	33%
Variety and diversity	50	31%
Atmosphere	44	27%
Entertainment	36	22%
Community and social	16	10%
Beer	7	4%
Accessibility and location	3	2%
Alcohol allowed	2	1%
Free entertainment	2	1%
Family Friendly	1	1%

Note: Respondents may have identified more than one theme, consequently percentages in this table add to more than 100%.

Food and entertainment

As the survey was conducted at the Food and Dance Spectacular, the spectators interviewed most frequently identified the food (64% of replies) as the thing they liked most. The variety of beer was also specifically mentioned by 4% of spectators interviewed. The dancing, performances and entertainment generally were also identified as the thing liked most by 22% of spectators. The variety and diversity of the experience in terms of the food available, the cultures on display or the entertainment presented was mentioned by 31% of respondents.

Culture

Thirty two per cent (33%) of respondents specifically identified the cultural aspects of the event as being something they liked most about the Festival.

"The fact that its countries from all around the world"
"Seeing people proud of their heritage"
"Embracing multiculturalism"

Atmosphere

The atmosphere of the Festival was mentioned as something they liked most by 27% of the spectators interviewed. Many spectators mentioned the crowds as important to the atmosphere. An additional 10% described social and community aspects of the event as being something they like most, as an opportunity to

meet friends, bring people together and as an event that was for people of all ages and cultures.

"The crowds – to see people out and about"
"The whole festival atmosphere"
"Good to see people getting along"
"The way people mix"
"Meet heaps of friends"
"The spirit of the day – beautiful to have different cultures sharing their best"

Spectators also described the positive benefits of the Festival to the Canberra community. For some the event was something that brought the city centre to life, for others it raised awareness of the multicultural nature of the Canberra community. Some spectators expressed a sense of pride in the way the Festival showcased the positive aspects of the people of Canberra.

"Garema Place occupied by people"
"Conversion of Civic to a market space"
"Flushing Canberrans out of their comfort zone and making them aware of the multicultural society"
"It shows how diverse Canberra is and it shows off the way Canberrans like to celebrate"
"It's a pity the whole world couldn't get on like this"

Location

Other aspects of the Festival that spectators nominated included the central city location of the Festival. This was viewed as providing good accessibility to all of the events on that day.

Alcohol

One per cent (1%) of respondents like most that the Festival permitted drinking: "you can drink in public and nobody cares." It was also noted that at the same time, the Festival was "family friendly", "people are behaving well".

Free entertainment

That much of the entertainment was free was also appreciated.

Favourite event

Spectators were asked to identify their favorite event. While the Glendi, Film Festival, Opening and Closing Ceremonies were each mentioned once,

responses predominantly referred to the Food and Dance Spectacular or related to specific performances seen at the Food and Dance Spectacular rather than Festival events that had occurred over the two week period. Responses to this question were also largely consistent with the 'what did you like most about the Festival' question, although dance also emerged as a favorite among spectators. A list of responses is provided in Appendix A, Table A1.

Results against key measures

Using a scale from 1 (very dissatisfied) to 5 (very satisfied), survey participants were asked to give a rating in terms of three aspects of the Festival:

- satisfaction with the atmosphere;
- satisfaction with the Festival program; and
- satisfaction with the value for money.

The display card at Appendix C was used to assist survey participants to answer against each aspect.

The results are shown in Table 2. Spectators were most satisfied with the atmosphere at the Festival, with 98% of spectators reporting that they were 'very satisfied' or "satisfied" with the atmosphere (up from 82% in 2006).

Table 2. Spectator Satisfaction: Comparison of 2008 and 2006 results (per cent)

	Very dissatisfied	Dis-satisfied	Neutral	Satisfied	Very satisfied	Did not see/use
2008 Results (per cent)						
Overall	0	0	3	31	66	0
Atmosphere	0	0	2	26	72	0
Festival program	1	2	22	22	29	25
Value for money	0	4	11	41	40	5
2006 Results (per cent)						
Overall	1	4	15	55	24	-
Atmosphere	0	3	15	42	40	-
Festival program	1	4	16	38	41	-
Value for money	0	4	11	41	40	-

While 85% of spectators were 'very satisfied' or "satisfied" with the Festival's value for money, 4% reported that they were dissatisfied with this aspect. This result was the same as that reported in 2006 however as spectators were only interviewed at the Food and Dance Spectacular in 2008, it is highly likely that their views about value for money were strongly influenced by food prices rather than the price of ticketed events.

"Some stalls are a bit expensive. Some stalls are quite cheap"
"Ticket programs are a bit expensive"

Spectators were less satisfied with the Festival program with 51% satisfied or very satisfied, 22% neutral and 3% dissatisfied or very dissatisfied. Twenty five per cent (25%) of respondents did not use or see the program. A respondent who was very dissatisfied provided the following feedback:

"The layout of the program is impossible to understand. The program should be in chronological order. It says 'get tickets for this performance' but it doesn't say where."

It was also noted that the program did not give times for Fringe Festival events.

Responses to the question "How can the Multicultural Festival be improved?" shed further light on the lower satisfaction in relation to both the Festival's value for money and Festival program.

Improving the Festival from the spectators' viewpoint

Table 3 provides a summary of replies to the question "How can the Multicultural Festival be improved?" categorised into common themes. The most commonly recorded response, given by 39% of spectators, was that no improvement was needed. In addition, spectators commented that the Festival should be held more often during the year (4%) or that the Food and Dance Spectacular should be extended over two days or across the whole week (3%). Some spectators (4%) were disappointed to find their nationality missing from the stalls (e.g. Scots or Maltese) or wanted more of the entertainment they enjoyed (e.g. performing arts or "join-in dances"). Two per cent (2%) of respondents wanted more children's events including during the week or an area set aside for children's activities.

"It seems perfect"
"No improvements needed"
"Its good now. Keep it going as it is"
"Great services - police, rest area for seniors, ambulance. Very clean. Nice"

Table 3. How can the Multicultural Festival be improved: Spectator responses

	Number	Proportion of all respondents
No improvement needed	63	39%
Hold more often during the year	7	4%
Extend Food and Dance Spectacular	5	3%
More countries, activities	7	4%
Too crowded, space too small	16	10%
Availability of program and information	15	9%
More advertising	15	9%
More seats, rest areas	8	5%
Parking and traffic congestion	7	4%
Food portion size, cost	7	4%
Children's activities	3	2%
Toilet availability	3	2%
Rubbish disposal	4	2%
More free events or food or more discounts	4	2%
Less alcohol	3	2%
Program timing of events	2	1%
Disability access	1	1%

Note: Respondents may have identified more than one theme, consequently percentages in this table add to more than 100%.

Crowding

While the crowds attending the Festival added to the positive feeling about the atmosphere, as crowd sizes reached peaks during the day the negative consequences of attendance numbers were identified as an area for improvement. Ten per cent (10%) of respondents identified crowding as an area where improvements could be made, suggesting that more space was needed. These suggestions were generally made by spectators who were interviewed between the times of 12pm and 2pm and between 4pm and 6pm. Spectators who mentioned parking problems or traffic congestion (4%) were generally interviewed in these same peak time periods.

Program and information

Nine per cent (9%) of spectators discussed the Festival program as an area for improvement, however this was specifically in relation to the availability of the program and of information about events and stalls. It is highly likely that the relatively low satisfaction with the Festival program reported above was related to its availability rather than the schedule of events. Only 1% of spectators had issues with the schedule itself – that there were too many events on the last day and that the Food and Dance Spectacular clashed with a Yarralumla concert.

"Need a program of performances"
"More availability of programs before and on-site"
"Maps of stalls, program of events"
"Booklet published too early as we lost it. A flyer early and then later the booklet/program"
"Should get program on arrival"
"Deliver program to towns in the region"
"Signs about what is on at the various stages"

Advertising

Nine per cent (9%) of spectators felt that there needed to be more advertising of the Festival both interstate and locally and particularly in the lead up to the Festival.

"Advertise it interstate – we never heard about it in Newcastle. We hear about your flower festival in Spring. We need to see this on our TV"
"More advertising, for example billboards in shopping malls"
"More information on lead up to the Festival"
"Need to encourage all ages, not just young families"

Food

Improvements to the festival that related to food (suggested by 4% of spectators) were largely concerned with the size of portions. As people were keen to sample many different dishes they frequently found the portions too large and were spending more than needed for meal size portions rather than purchasing sample size portions.

"Smaller portions of food, less cost. More variety to sample"
"Smaller samples of food so you can sample more before getting too full up"
"Finger food"

Amenities

The need for more tables, shade, seating with stage visibility and rest areas were identified as areas for improvement by 5% of spectators. Inadequate toilet facilities were mentioned by 2% of spectators, with after hours activities being more affected than day time activities (when shopping centres were open). Portaloos were suggested solutions. Rubbish disposal was also a problem

identified by 2% of spectators, both in the availability of bins and the need to empty them more regularly.

Alcohol

While 4% of spectators liked the variety of beer most about the Festival, 2% felt that an improvement to the Festival would be to reduce the number of beer stalls and encourage less drinking.

Disability access

Mobility impaired spectators found the Festival difficult to access fully as the following quote shows:

“First time I’ve had a leg operation before. I was horrified to see how hard it is for disabled people. We couldn’t find a park anywhere - 1.5km away. I can’t queue up. Mobility is difficult.”

Event Promotion

Spectators were asked how they first found out about the Festival. Most of those interviewed reported that they found out about the festival either from word of mouth (33%) or from previous knowledge of the event (33%). Coverage or advertising in newspapers, radio or television reached 20% of spectators, with newspaper and radio advertising being equally successful in reaching people with the message for the first time. The results for this question were consistent with the 2006 survey results.

Two per cent of spectators learned about the event for the first time through the Festival website. Website hit counts showed that there were 10,692 unique visits to the Festival website in February.

Table 4. How did you first found out about the multicultural festival: Spectator responses

	Number 2008	Proportion 2008	Proportion 2006
Word of mouth	52	32%	35%
Previous knowledge	54	33%	31%
Event web site	3	2%	1%
TV	8	5%	3%
Newspaper stories/editorial	1	1%	4%
Newspaper advertising	12	7%	4%
Radio	11	7%	2%
Festival program (mail)	7	4%	12%
Festival postcard	0	0%	0%
Festival office (Civic)	0	0%	0%
Other	14	9%	8%
Total	162	100%	100%

Other means of hearing about the Festival included by happening across the Festival during a trip to or through the city centre (6% of respondents), by information provided by the Visitor Information Centre (1%), by seeing flyers or posters in the library or at local shopping centres (1%) and the ACT Government Intranet (1%).

Sponsor awareness

Spectators were asked to name sponsors of the Festival. They were not provided with any cues for responding to this question.

Most spectators (61%) stated that they did not know who the sponsors of the Festival were. Where spectators were able to name sponsors the most commonly identified ones were the Tradies Club (named by 4%), ABC (5%), Fyshwick Fresh Food Markets (10%), ACTEWAGL (12%), and ACT Government (13%). The AFP, Lavazza and Canberra Connect were correctly named as sponsors by just 1% of spectators.

Of the 26 sponsors of the event, eight were named by spectators. Some businesses, such as Kennards which participants used for hired equipment, were incorrectly named as sponsors.

It should be noted that spectators were asked to recall sponsors' names without any recall cues. This is a much more difficult cognitive task than asking spectators whether they recognise sponsors' names from a list. Where an individual is able to recall a sponsor without cues this indicates that the sponsors' name has been given a strong association with the event in the individual's memory. That one spectator in twenty were able to recall the Tradies and the ABC and one spectator in ten were able to recall Fyshwick Fresh Food Markets and ACTEWAGL as sponsors indicates that the sponsors names are strongly associated with the event in these spectators minds.

To put these results in perspective, a 1995 study of spectator recall rates showed that, Mitsubishi, the major sponsor of the Australian National Basketball League (NBL) competition reported a recall rate of only 13%. Coca-Cola, a lower level sponsor of the NBL who reportedly spent considerably less on their sponsorship of the NBL, achieved an awareness level of 12% (Shoebridge, 1995). At the Los Angeles Olympics, Coca-Cola reportedly achieved a recall rate of just over 50% as major sponsor (Stotlar, 1993).

Table 5. Can you name any of the sponsors of the Multicultural Festival: Spectator responses and sponsor status

	Number	Proportion of all respondents	Sponsor status
Don't know	99	61%	
ACT Government	21	13%	√
ACTEWAGL	20	12%	√
Fyshwick Fresh Food Markets	16	10%	√
ABC	8	5%	√
The Tradies	7	4%	√
Labour Club	4	2%	X
FM 91.1	3	2%	X
AFP	2	1%	√
Kennards	2	1%	X
DHCS	2	1%	X
Multicultural Department	2	1%	X
Multicultural Festival/society	2	1%	X
Lavazza	1	1%	√
Canberra Connect	1	1%	√
Mudgee Wines	1	1%	X
SBS	1	1%	X
Oxfam	1	1%	X
Austrian Australian Club	1	1%	X
Hellenic Club of Canberra	0	0%	√
Australian National University	0	0%	√
City News	0	0%	√
The Canberra Times	0	0%	√
Capital Coaches	0	0%	√
Win Television	0	0%	√
The Street Theatre	0	0%	√
DFO	0	0%	√
Canberra CBD Ltd	0	0%	√
ACT TAB	0	0%	√
The Club Group	0	0%	√
Citizen's Advice Bureau ACT	0	0%	√
Canberra Theatre Centre	0	0%	√
Ideas and Directions	0	0%	√
ALCAN	0	0%	√
Dendy Cinemas	0	0%	√
Goanna Print	0	0%	√

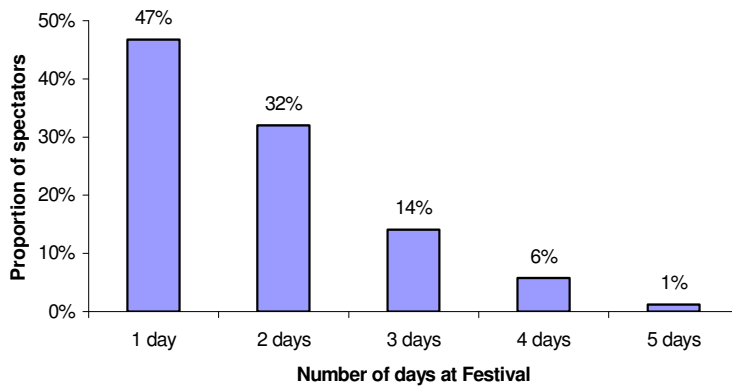
Note: Respondents may have identified more than one sponsor, consequently percentages in this table add to more than 100%.

Festival attendance

Number of days at the Festival

When asked how many days spectators would attend the Festival, responses ranged from one to five days (Figure 3). While almost half stated that they would attend the event for one day (47%), the average length of attendance was two days.

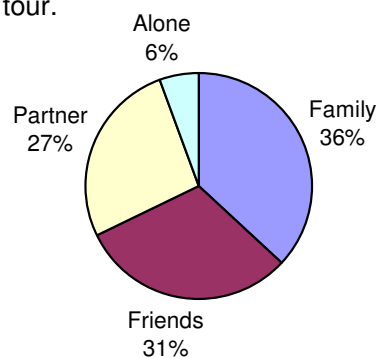
Figure 3. Number of days spectators had attended or would attend the Festival



The results for the 2006 Festival showed a higher proportion of spectators reporting they had or would attend the Festival for 3 days or more (see Appendix A, Table A3 for comparison figures). The difference in results between the 2006 and 2008 surveys is likely to reflect different attendance patterns of those who attend the Food and Dance Spectacular compared to those who attend a range of Festival events, rather than changes in Festival attendance patterns over time.

Travel party

Spectators came to the Festival in family groups (37%), as a group of friends (31%) or with a partner (27%). Six per cent of spectators were attending the Festival alone. None of the spectators interviewed were attending the Festival as part of an organised tour.



Contribution to tourism

A number of questions in the survey yield information to assess the contribution the Festival makes to tourism to the ACT.

Most of those attending the Festival were residents of the ACT (84%). Fifteen per cent (15%) of spectators interviewed indicated that they lived interstate and 1% lived overseas (Table 6).

Table 6. Where do you usually live: Spectator responses

	Number	Proportion of all respondents
ACT	136	84%
Queanbeyan/ Jerrabomberra	5	3%
Other NSW	13	8%
Other Interstate	6	4%
Overseas	2	1%

Overseas and interstate visitors (excluding those from Queanbeyan and Jerrabomberra) were asked a number of questions aimed at investigating whether the Multicultural Festival had directly influenced their travel and stay in Canberra. The majority of interstate and overseas visitors (62%) were not aware of the Festival prior to their visit to Canberra (Table 7).

Table 7. Did you know that the Multicultural Festival was currently being held prior to your visit to Canberra: Interstate and overseas spectators

	Number	Proportion of all respondents
Yes	8	38%
No	13	62%
Total	21	100%

Note: Table excludes interstate spectators from the Queanbeyan/Jerrabomberra region

Interstate visitors and overseas visitors who knew the Festival was being held were asked "Would you have come to Canberra this time had the Multicultural Festival not been held?" Three of the eight interstate or overseas visitors who knew the Festival was on stated that they would not have come to Canberra had the Festival not been held (or 2% of all spectators interviewed). These Interstate visitors were from 2621 (Bungendore); 2256 (Woy Woy) and 2032 (Kingsford).

Of the 13 interstate or overseas spectators who were coming to Canberra regardless of whether the Festival was on or not, two had extended their stay due to the Festival (Table 8). This equates to 1% of the total sample of spectators. Spectators were also asked how many nights they extended their stay. One spectator stated that they were staying seven extra nights and the other provided no response.

Table 8. Since you were coming to Canberra in any case at this time of the year, did you extend your stay because of the Multicultural Festival: Interstate and overseas spectators

	Number	Proportion of all respondents
Yes	2	15%
No	11	85%
Total	13	100%

Note: Table excludes interstate spectators from the Queanbeyan/Jerrabomberra region

The very small number of responses in relation to these issues limits the extent to which it is possible to make general conclusions for the broader population of spectators attending the Festival. However if 3% of spectators either came to Canberra only for the Festival or extended their stay for the Festival and if total spectator numbers were in the order of 200,000¹ then it could possibly be estimated that the Festival may have attracted in the order of an additional 6,000 tourists to Canberra.

Contribution to economy

A number of questions in the survey provide information to assess the contribution the Festival makes to the economy of the ACT through the interstate and overseas visitors that it attracts.

Table 9. How many nights do you intend to stay in Canberra: Interstate and overseas spectators

Days	Number	Proportion of respondents
1	6	32%
2	3	16%
3	2	11%
4	2	11%
5	1	5%
6	0	0%
7	2	11%
36	1	5%
120	2	11%
Total	19	100%

Note: Two spectators from New South Wales who were not in the Queanbeyan / Jerrabomberra region did not stay overnight.

Table excludes interstate spectators from the Queanbeyan/Jerrabomberra region

The majority (84%) of interstate and overseas spectators (excluding those from Queanbeyan and Jerrabomberra) stayed a week or less in during their visit to Canberra. The most common length of visit was two nights (36% of interstate or overseas spectators). Those who came to Canberra specifically for the

¹ Estimates of the number of spectator attending the Festival have not been confirmed.

Multicultural Festival (three spectators) were staying for four or one night. One was not staying overnight. The small number of replies limits the generalisability of this result.

Expense patterns of interstate visitors

Of the spectators from interstate or overseas (excluding Queanbeyan and Jerrabomberra), 55% reported their expenditure to cover a couple, 5% reported their expenditure to cover a couple and one child and 40% reported expenditure for a single person only.

Interstate and overseas spectators were asked to estimate the amount they intended to spend in the ACT whilst at the Multicultural Festival. Expenditure is summarised in Table 10 with separate figures for those who came to Canberra specifically for the Festival, those who extended their stay because of the Festival and for all interstate and overseas spectators (excluding Queanbeyan and Jerrabomberra).

Table 10. Expenditure by interstate and overseas spectators

Expenditure type	Average per spectator in Canberra for the Festival (n=3)	Average per spectator extending stay for the Festival (n=2)	Average per interstate or overseas spectator (n=20)
Accommodation	\$21	\$105	\$92
Meals, food and drinks	\$42	\$150	\$110
Other entertainment	\$23	\$75	\$34
Other expenditure	\$7	\$150	\$29
Personal services	\$3	\$0	\$1
Transport in the region	\$8	\$30	\$30
Total	\$104	\$510	\$294

Note: One interstate spectator did not provide expenditure data as all expenses were said to be work related.

Spectators who came to Canberra specifically for the Festival are those whose expenditure most directly contributes to the ACT economy. The average spending is reported in Table 10 as \$104, however low numbers of spectators captured by the sample limit the extent to which conclusions can be made. The low average accommodation cost for this group is the result of some spectators having no cost for accommodation as they stayed with friends or family (see Table 11). Similarly, the expenditure of those who extended their stay in Canberra due to the Festival is based on a sample of only two and cannot be considered reliable for estimating the expenditure of Festival tourists. A better estimate may be to use the expenditure of all interstate and overseas spectators (\$294 spent whilst at the Festival).

If three out of 162 spectators (2% of spectators) had come to Canberra specifically for the Festival and an additional 1% had extended their stay here for the Festival, and based on a general estimate that there were approximately

200,000 spectators at the Festival in total, it could possibly be estimated that the spending of an additional 6,000 tourists to the capital at an average of \$294 each made a contribution of approximately \$1.8 million.

Accommodation

Using a provided list of accommodation types, interstate and overseas spectators were asked to identify the type of accommodation they were using or were likely to use during their stay in the ACT for the Festival.

Table 11 shows that of the 21 spectators to whom this question was relevant, 19% stayed in motels, hotels or self-contained apartments. Fifteen per cent stayed in hostels, backpackers or caravan parks. Most spectators (57%) stayed with family or friends and 10% did not stay overnight.

Table 11. Type of accommodation used during spectator stay in the ACT: Interstate and overseas spectators

	Number	Proportion of respondents
Did not stay overnight	2	10%
Motel or hotel	3	14%
Self-contained apartment	1	5%
Youth Hostel or Backpackers	1	5%
Caravan park	2	10%
A private home of family or friends	12	57%
Total	21	100%

Note: Tables excludes interstate spectators from the Queanbeyan/Jerrabomberra region

Spectator demographics

Age and Gender of respondents

The sample of respondents showed a relatively even spread of age groups, with a higher proportion of 25-34 year olds.

Table 12. Age group of spectators surveyed

	Number	Proportion of all respondents
15-24	23	14%
25-34	57	36%
35-44	17	11%
45-54	25	16%
55-65	23	14%
65 and over	15	9%
Total	160	100%

As with the previous 2006 survey, there were a slightly higher proportion of female respondents. This gender imbalance in the survey sample is likely to reflect the general trend for greater willingness to participate in surveys among women compared to men.

Table 13. Sex of spectators surveyed

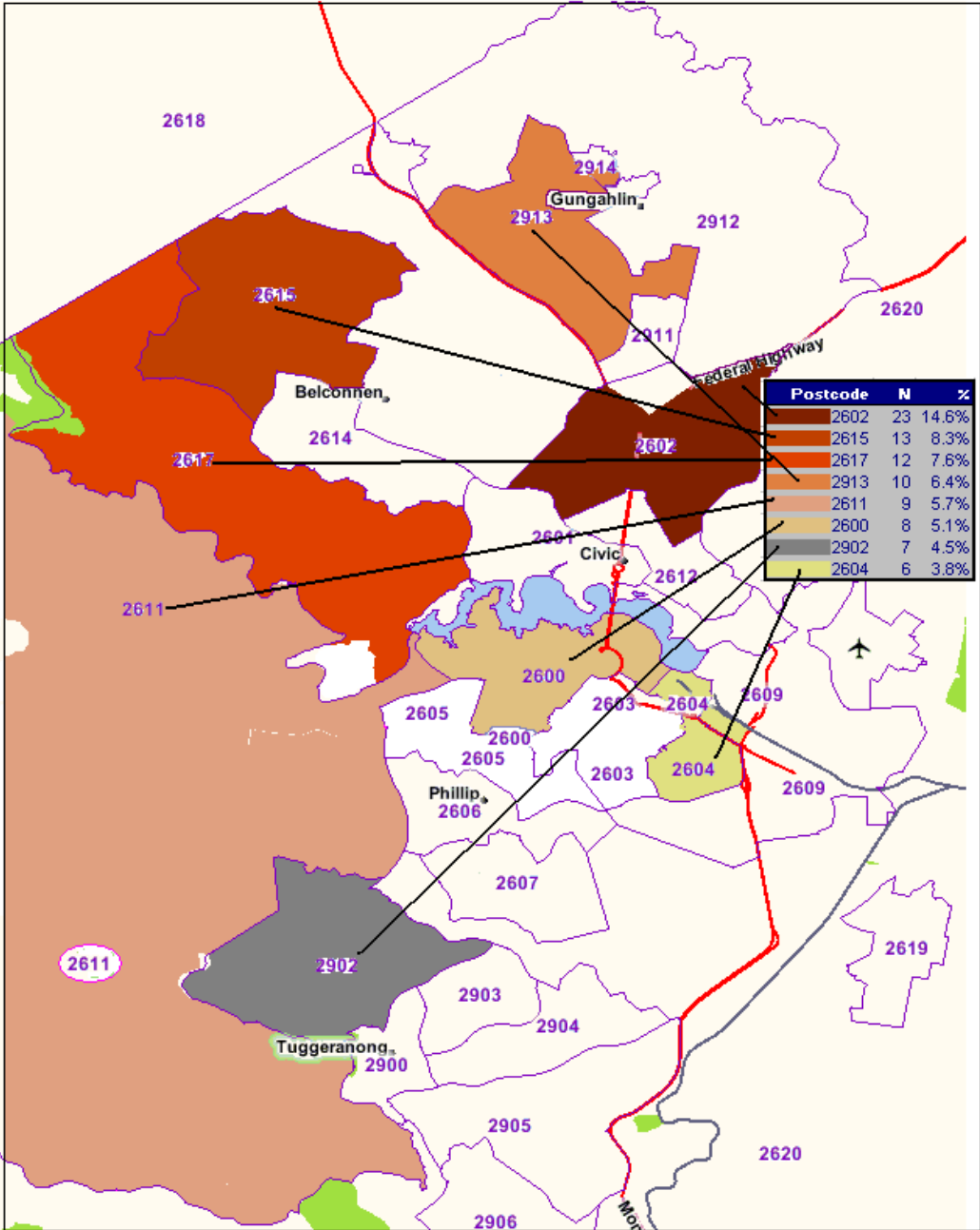
	Number	Proportion of all respondents
Female	94	58%
Male	68	42%
Total	162	100%

Usual residence

Spectators were asked to give the postcode where they usually lived. Figure 3 shows the results for the most commonly reported postcodes.

Most spectators were from the Inner North, Belconnen or Weston Creek. A full list of postcodes is provided in Appendix A, Table A3.

Figure 3 Spectator postcode of usual residence (top 56%).



Recommendations

Feedback from spectators points to the need for more information about the Festival program. Initiatives such as making programs available at all venues would not only resolve the spectators' need for information but would also improve spectators' sponsor awareness.

Advertising interstate and more frequently in the lead up to the Festival is likely to increase Festival attendance.

The following is a summary of useful additional spectator feedback on how the Festival could be improved:

- the need for additional crowding reduction measures. This was particularly an issue at peak time during the Food and Dance Spectacular which could be said to extend between 12:00pm and 7:00pm. Additional shaded seating and tables away from main walkways are one method of achieving this;
- improved disability access or clear information about disability access;
- a map of stalls at the Food and Dance Spectacular;
- smaller sample size portions of food available at food stalls;
- more seating at stages;
- additional toilet facilities;
- improved rubbish bin availability and rubbish removal;
- a dedicated children's activities area at the Food and Dance Spectacular and more activities for children on weekdays; and
- availability of Festival programs in newspapers or letterboxes just prior to the event.

The location of the Food and Dance Spectacular in the centre of the city was noted as being something very positive for Canberra in bringing the city centre to life and creating a sense of community in the heart of Canberra. It was also seen as enhancing the Festival's accessibility. While space constraints present some challenges, there are clearly strong positive reasons for keeping the Festival, and in particular the Food and Dance Spectacular in the centre of the city.

The availability of alcohol at the Food and Dance Spectacular received a mixed response but was largely seen as a positive aspect of the Festival, particularly the wide variety of international beers available. Those spectators who commented negatively in relation to the availability of alcohol expressed concerns about the potential for trouble, however there were no reports of antisocial behaviour. Rather it was noted that people were "well behaved". It appears that the availability of alcohol in the context of a Festival event more

focused on food and entertainment has supported the responsible consumption of alcohol.

The ability to draw conclusions about the contribution of the Festival to the economy would be strengthened by undertaking spectator counts at events and by restricting the survey sample to those who had travelled to Canberra from interstate or overseas.

References

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Appendix A

Table A1. Which event was your favorite: Spectator responses

Event	Per cent of respondents
All	6%
Food and Dance Spectacular	38%
Food	21%
Dance	9%
Music	1%
Fringe	1%
Theatre	1%
Finale	1%
Fringe	1%
Opening ceremony	1%
Concerts	1%
Bangladeshi Show	1%
Film festival	1%
Glendi	1%
Gospel Spectacular	1%
Bollywood dancing	1%
FM 91.1	1%
Aboriginal dance	1%
New Zealand performance	1%
South Sea Islanders	1%
Macedonian dancers	1%
Circle of Rhythm	1%
Beer	1%
Circus	1%
Persian dancing	1%
Chilean dancers	1%
Bagpipes	2%
Argentinian performers	1%
Belgian beer	1%
Croatian beer	1%
German beer	1%
Middle eastern	1%
Drum music	1%
Polish dancing	1%
African dancing	1%
South American dancers	1%
Serbian dancing	1%
Brazilian group	1%
Russian tent	1%
Children's dance troupe	1%
Belly dancing	1%
Pacific islanders	1%

Table A2. How many days have you or will you attend the Multicultural Festival this year: Comparison of 2006 and 2008 results

Days	Number 2008	Proportion of respondents 2008	Proportion of respondents 2006
1	73	47%	34%
2	50	32%	28%
3	22	14%	21%
4	9	6%	8%
5	2	1%	4%
More than 5	0	0%	5%
Total	156	100%	100%

Table A3. Postcode of usual residence

Postcode	N	Postcode	N	Postcode	N
2602	23	2607	3	2280	1
2615	13	2619	3	2290	1
2617	12	2906	3	2601	1
2913	10	2914	3	2621	1
2611	9	2903	2	2870	1
2600	8	2912	2	2900	1
2902	7	2032	1	3067	1
2604	6	2037	1	3153	1
2612	5	2076	1	3175	1
2614	5	2122	1	4103	1
2905	5	2125	1	4500	1
2605	4	2156	1	5097	1
2606	4	2170	1	Canada	1
2620	4	2256	1	Malta	1
2904	4				
TOTAL					119

Appendix B

2008 Multicultural Festival Spectator Survey Form

Time of Interview.....

Hi, my name is and I work for the Department of Disability, Housing and Community Services. We are conducting a survey and we'd like your help. It should only take a few minutes to participate in the survey. All the information you provide is confidential and will not be distributed to a third party.

Deleted: for Tourism Research

1. How did you first find out about the Multicultural Festival? [One response only]

Word of mouth	1
Previous knowledge	2
Event web site	3
TV	4
Newspaper stories/editorial	5
Newspaper advertising	6
Radio	7
Festival program (mail)	8
Festival postcard	9
Festival office (Civic)	10
Other	11
(please specify)	

2. Which of the following best describes your travel party today?

Alone	1
With partner	2
With family	3
With friends	4
Organised tour	5
Other	6
(please specify)	

3. On a scale of 1 to 5, where 1 represents 'very dissatisfied' and 5 represents 'very satisfied', how satisfied are you with The Multicultural Festival...? [Use display card]

	Very dissatisfied	Dissatisfied	Neutral	Satisfied	Very satisfied	Not applicable
Overall	1	2	3	4	5	6
It's Atmosphere	1	2	3	4	5	6
The Festival program	1	2	3	4	5	6
Value for money	1	2	3	4	5	6

4. How many days have you or will you attend the Multicultural Festival this year?days

5. Can you name any of the major sponsors of the Multicultural Festival? [Prompt – from advertising that you have seen or brochures?]

1	
2	
3	

6. Where do you usually live?

		Postcode	
ACT	1		Go to Q15 (Pg4)
Queanbeyan/Jerrabomberra	2		Go to Q15 (Pg4)
Other NSW	3		Go to Q7
Other Interstate	4		Go to Q7
Overseas	5		Go to Q7

FOR INTERSTATE AND OVERSEAS VISITORS ONLY

7. How many nights do you intend to stay in Canberra?nights
8. Did you know that the Multicultural Festival was currently being held prior to your visit to Canberra?

Yes	Go to Q9
No	Go to Q10

9. Would you have come to Canberra this time had the Multicultural Festival NOT been held?

Yes	Go to Q10
No	Go to Q12

10. Since you were coming to Canberra in any case at this time of the year, did you extend your stay because of the Multicultural Festival?

Yes	Go to Q11
No	Go to Q12

11. How many more nights will you stay because of the Multicultural Festival?

.....nights

I WOULD LIKE TO ASK YOU SOME QUESTIONS ABOUT YOUR spending WHILE IN THE ACT. THIS WILL ASSIST IN GAUGING THE IMPACT OF THE MULTICULTURAL FESTIVAL ON THE LOCAL ECONOMY.

12. Could you please estimate how much you intend to spend in the ACT whilst at the Multicultural Festival? REMEMBER to include all payments made by cheque, bankcard and credit card and include your best estimates if you are unsure. DO NOT INCLUDE amounts that were spent on you by other people, only the money that you intend to spend on yourself or others.

		Expenditure in the ACT
(a)	Accommodation? (Please indicate amount and include prepaid)	\$A.....
(b)	Meals, food and drinks, not included in your accommodation bill?	\$A.....
(c)	Other entertainment costs?	\$A.....
(d)	Any other expenditure? (e.g. films, gifts, books, wine, souvenirs, clothing, toiletries)	\$A.....
(e)	Personal services? (e.g. hairdressing, laundry, medical)	\$A.....
(f)	Transport in the region (e.g. taxi fares, petrol, vehicle repairs, bus fare, car hire, etc.)	\$A.....

13. How many people does all of your expenditure cover?

Adults	
Children	

14. Which one of the following best describes the type of accommodation you are using or are likely to use during your stay in the A.C.T. for the Multicultural Festival?

Did not stay overnight	1
Motel or Hotel	2
Youth Hostel or Backpackers	3
Caravan Park	4
A Private Home of Family or Friends	5
Other Accommodation	6

15. What did you like MOST about the Multicultural Festival?

--

16. Which EVENT was your favourite?

--

17. How can the Multicultural Festival be improved?

--

18. On a scale of 1 to 5, where 1 represents 'very unlikely' and 5 represents 'very likely', how likely are you to attend the Multicultural Festival next year?

Very Unlikely	Unlikely	Neutral	Likely	Very Likely
1	2	3	4	5

19. Would you recommend the Multicultural Festival to a friend?

Yes	Maybe	No
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21. Which of the following age groups describes you?

15-24	25-34	35-44	45-54	55-64	65+
1	2	3	4	5	6

22. Record Gender

Female	1
Male	2

Appendix C

Q3.

Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
1	2	3	4	5

Q19.

Very Unlikely	Unlikely	Neutral	Likely	Very Likely
1	2	3	4	5

Q20. Age groups

15-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65 years and over
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