



National Folk Festival Ltd

ABN: 96 058 761 274

ANNUAL REPORT 2017-18



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BACKGROUND

The National Folk Festival started life as the Port Phillip District Folk Music Festival on the weekend of 11 & 12 February 1967 at the Teachers College, Melbourne University. A second Festival was held in Melbourne in 1968 and then, in 1969 it was relocated to Brisbane. From then on it crisscrossed the country, being held annually in a different state/territory under the auspices of the Australian Folk Trust.

The last traveling National Folk Festival was held in 1992 when the National Folk Festival Limited, a not-for-profit company limited by guarantee, was formed for the primary purpose of annually conducting the event. From 1993 the National Folk Festival was permanently located in Canberra (ACT) where it established its current home at Exhibition Park. In 2018 the National Folk Festival celebrated its 52nd annual event, a testament to its ability to remain culturally relevant and enduring.

THE CURRENT EVENT

The National Folk Festival is an annual highlight for Australia's folk community as well as those who love the Festival for the quality and variety of its world-class program and the wide range of engagement it provides for attendees. Attracting a broad audience across different ages, sexes, races and socioeconomic backgrounds patrons travel from all over Australia and some from overseas to attend the event. The Festival also attracts a total of over 4,000 volunteers, stallholders, instrument makers, both national and international performers and community folk groups.

The National Folk Festival celebrates folk culture in all its diverse forms from high-end entertainment to the expression of folk-life through grassroots and participatory activities. Its multi-disciplinary program offers music, dance, circus, a dedicated First Peoples program, spoken word, street theatre, talks, master classes, community arts and a range of family and child oriented activities. The Festival also provides many services that are beneficial to individuals and communities. These include, but are not limited to, stages and spaces to share and engage in the expression of folk culture, opportunities to participate in the folk arts through workshops and forums, the potential for new and emerging artists to develop and showcase their craft and, for industry practitioners, a chance to network and connect with each other.

The Festival supplements the large permanent venues on site with temporary venues (all with seating) providing patrons with a range of performance spaces and other facilities where they can relax and enjoy the entertainment or socialise with friends and family. Many come for the whole Easter weekend, camping on site.

Over its 52-year history, the National Folk Festival has prospered with the enthusiastic support of volunteers, performers and the wider folk community. The Festival is a cultural product with meaning and value, a strategic player in the wider folk community and a highly regarded advocate for excellence, innovation and accessibility across all disciplines of the folk arts. It is a key event on the ACT's cultural calendar and generates significant economic benefits to ACT tourism and the local community.



NATIONAL FOLK FESTIVAL STRATEGIC PLAN 2017 – 2020

Mission: To deliver an annual National Folk Festival that offers a wide range of engagement in the folk arts, and a high level of participation for its attendees.

To ensure the event is safe, culturally relevant, creative and enduring with a strong sense of community.

Vision: The National Folk Festival will be a nationally recognised, annual exposition and celebration of folk culture.

Core Values:

1. Respect – for our traditional and contemporary folk culture; for one another.
2. Inclusiveness – openness to diverse participation, respecting personal contribution and effort.
3. Teamwork– common goals, different roles, collaborative action, shared accountability and rewards.
4. Professionalism – good governance and management, honesty, integrity and transparency

Goals

1. ARTISTIC - Present an artistically engaging and exciting festival
2. FINANCIAL - Strong financial resilience.
3. MARKETING & COMMUNICATION - Innovative Marketing and Promotion.
4. BUSINESS - Good business, and an efficient organisation
5. PEOPLE - A motivated flexible team.
6. GOVERNANCE - Effective and sustainable governance.
7. OPERATIONS - Smooth, efficient operations and a safe, environmentally aware festival.



PRESIDENT'S REPORT

Back in 2014 the Board developed a Strategic Plan for 2015-2020, our guiding plan ever since. Following the 2017 Festival the Board and staff undertook a review of the Plan and further revised the plan for 2017-2020. It is largely against this plan that we measure our success.

Artistically, we are achieving our goal to present an artistically engaging and exciting festival. The Festival Director who is also our Artistic Director, presented a wonderful program at this year's Festival and must be given full credit for this achievement.

Financially, we are also achieving our goal for strong financial resilience. 2017-18 has been yet another successful year and the Company ends the reporting year with a stable financial reserve and is arguably in the best financial position it has ever been in. While the Board and staff can take much credit for this, the fact that we were again blessed with wonderful weather for the National Folk Festival at Easter boosted ticket sales and, therefore, our bottom line. Looking ahead there is more to be done to diversify our income sources beyond the one major source of annual income and increasing income from sponsorships and grants.

In relation to our Marketing and Communication goal of innovative marketing and promotion, we are actively seeking to raise the profile of the Festival both nationally and in the Canberra region. The Festival Director's success in securing three year funding from the ACT Government has enabled us to undertake a review of our economic impact for the ACT and given us a much needed baseline from which to measure our marketing success going forward. The second year of funding is enabling us to revitalise our marketing with the assistance of our new marketing provider and it is hoped that the strategies being implemented will enable us to reach new target audiences. We all know what a great event the Festival is. We just need to entice more people to come and find that out for themselves.

Running a good business and an efficient organisation, which is our Business goal, takes time and effort. It is also linked to our Operations goal of having smooth, efficient operations and a safe, environmentally aware festival. Following the 2018 Festival an extensive debrief process was engaged in by the Board, staff, key contractors and Area Coordinators. While many ideas emerged out of that process, the Board identified as a high priority the need to improve the onsite management of operations and production at the Festival, particularly during the set-up period. It will require some changes to the way things have been done in the past. While organisational change is never easy, putting in place the framework to effect improvements will be a major focus for the year ahead.

In terms of our Governance, we aim for effective and sustainable governance. While we believe we are tracking well against this strategic goal, there is no room for complacency. Revitalising the Board from time to time is good governance. It is important to select people for Company and Board Membership who not only have desirable skills and experience and love our event, but who also understand the history of our Festival and why our Festival is so special. Mark Cranfield, a Company Member and Board Member between 2007-13 recently said to me: "The Festival is not an exercise in nostalgia. People support it or are drawn to it because it has an ethos, a characteristic spirit, and they come away from it enriched by the experience." Our goal is to have Board Members who 'get' the Festival.

Lastly, but by no means least important, our people goal is to have a motivated flexible team. This is one area in which we can continue to improve. Our Festival has survived and thrived over its 52 years on the goodwill of people. We have a small but highly dedicated team of paid staff who work all year planning our

Festival. They all do a fantastic job. In the period shortly before and during the Festival that team swells to include several paid contractors, some 60 volunteer Area Coordinators and over 1200 volunteers who together make our Festival happen. We know that many of our people have put in way above the hours that they are paid for or much more than is required to 'earn' their Festival ticket. Some have done so over many years. The enormous goodwill embodied in our people is intangible, but it goes to the heart and soul of the Festival. We thank you and applaud you.

After the Festival we farewelled some Festival team members. Our Program Administrator Karlie Megay, our Volunteer Manager Sarah Boyd and our IT Manager Kim Navin resigned from the Staff team. In addition, several long standing Area Coordinators will not be continuing in their roles in 2019. Kylie Mulligan has been a valued volunteer Area Coordinator since 2008 (2 years with Festival Coffee Shop and 9 years with Bar Cashiers), Lorraine Brinsden has been our volunteer Pre-Festival Gates Area Coordinator since 2015 and Rowan Hearn has been the Area Coordinator for one of our Ticket Offices for 4 years. We thank you all and wish you well.

Finally, I acknowledge and thank my fellow volunteer Board Members. We have had a challenging year in many respects as we all seek to devote the necessary time and energy to fulfil our Board responsibilities while juggling work, family and other commitments. We farewelled three Board Members over the reporting year. Richard Kenyon who joined the Board in 2011 and chaired our Finance and Audit Committee stepped down at the Annual General Meeting (AGM) in October 2017. We appointed Peter Bayliss to take over this role in July 2017 but Peter stepped down from the Board in May 2018. David Whitney, who joined the Board in 2016 and brought valuable arts management experience to the Board, resigned in May 2018. We also welcomed Genevieve Jacobs to the Board in February bringing her extensive journalistic experience to our ranks.

I have personally had a long association with the Festival – I've attended every Festival since 1993 when Canberra became its permanent home and given 21 years' volunteer service since 1998 in one capacity or another. I first joined the Board at the end of 2001 and have been on the Board for 15 of the past 17 years. When I step down from the Board at the Company's AGM in October 2018 I will have completed 6 years as Board President. I will leave knowing that the Company and therefore, the Festival, is in a very healthy state. I've seen a lot of changes over those years and while I believe the heart of the Festival is as strong as ever, I also know it is a very precious and fragile thing. The goodwill that has been so generously given and built up over many years, can easily be taken for granted and lost. We must value the contribution of all who make our Festival 5 Days in a Perfect World. I have confidence that those who will take over from me understand this and will build on the achievements of the past, achieve the goals we have set and take the Festival to an even bigger and brighter future.

Gabrielle Mackey
President



FESTIVAL DIRECTOR'S REPORT

52 years on, the National Folk Festival (NFF) continues to be a common ground for the expression of folk life and culture, providing a unique moment in our year. It is with great enthusiasm that I deliver my fifth annual report as its Director. The 52nd Festival opened to exceptional weather for a late Easter, a new entertainment zone footprint and, we were blessed with another highly successful year both artistically and financially, strengthening our position as both a culturally relevant and economically sustainable event. Attendance increased by 2% and, for the first time in many years we made our ticket sales budget. Of course, this report is not just about those five perfect days at Easter. It is also very much about the other 300 days and how we plan to be sustainable, to grow and develop what we do, to be responsive to and reflect new opportunities and, to remain culturally relevant, creative and enduring in an ever changing world.

Among our key goals for the three years 2018-20 is to grow new audiences for the Festival, raising the profile of the NFF to a wider cohort nationally and creating greater recognition through bespoke marketing messages to reach those identified new audiences. To this end a comprehensive Business Plan was developed with the express purpose of obtaining multi-year funding from the ACT Government's Event Fund to implement strategies to achieve this goal. We were successful.

Year one of the three-year funding cycle has just been completed with the commissioning of an independent study conducted by IER in tandem with the 2018 Festival. This has provided both quantitative and qualitative data on economic impacts, social and community perceptions and, attendee experience, behaviours and attitudes to the Festival. A summary of this study is included on pp16-18. The data has been used to inform the second part of 2018 funding, to engage Kylie Cobb from Kitty Kitty Bang Bang Music PR & Marketing to undertake a brand audit and develop a comprehensive marketing plan to take us into the 2019 & '20 Festivals. Year two grant funding will assist with the development of marketing collateral and the implementation of our 2019 marketing campaign. The final year of funding will be allocated to the development of a major artistic program initiative.

I believe that, if it is to survive, our National Folk Festival must be responsive not only to our folk communities but also to a broader public, acting as the catalyst for interaction and dialogue between cultures and generations. This year's program delivered on many levels: it presented exceptional folk, world and roots music; major national and international artists were showcased alongside those whose voices are just emerging; grass roots, community and participatory activities such as the Session Experience, National Uke Muster and Bush Traditions Settler Sessions encouraged engagement and enjoyment in the folk arts in ever increasing numbers.

A major programming focus is to improve engagement in the Festival and in folk culture for young people. In 2018 our Borderland venue gave voice to quirky, edgy troubadours like The Bottlers, Georgia State Line and Low Down Riders, as well as to new, emerging young artists such as Alice Skye, Beamish Boys and Matilda Rose. With a particular emphasis on young artist development NFF continues to strengthen its partnership with Folk Alliance Australia (FAA) hosting the FAA Young Artist of the Year Award, the "Folk Rising" concert series and, by offering industry workshops to assist emerging young artists.

While a key focus of the artistic vision has been to significantly increase the number of international acts, 27 in 2018, the cornerstone of the Festival must always be our unique and diverse Australian "folk" culture. Our 2018 line-up featured a wealth of Australian artists of extraordinary calibre across disciplines including

dance, spoken word and circus. Indigenous communities were celebrated through our First Peoples' program. This year's outstanding highlights included Dhapanbal Yunupingu, Joe Geia and Darwin Rondalla Stringband. The contribution of Italian communities to our musical heritage was recognised in the awarding of the 2018 National Folk Fellowship to Salvatore Rossano for his project 'Sonu' and, the late Col McJannett who gave so much to the folk community and especially to the NFF was acknowledged and celebrated in a very special tribute concert and presentation.

Of course the National has not been without its challenges, especially as Canberra's urban development continues. In 2017 and '18 we've had to contend with the light rail development. We not only lost a major income stream in the Flemington Road car park, we also had to totally rethink our main site entry point. This shifted to Well Station Road placing a huge strain on both our physical and human resources and, amongst other safety issues, was a major consideration in the reorientation of the entertainment zone footprint in 2018. I am pleased to report that this was very well received with many positive comments noted in our survey.

As housing density increases around EPIC another challenge has been compliance regarding noise levels. This year, in partnership with EPIC we undertook robust noise monitoring of the event from the compliance location in Darley Rd, Watson. This came about due to conditions imposed on NFF by EPA following the 2017 event. Again, while we satisfied requirements in 2018 there are a number of recommendations made by EPA that will present challenges for us in 2019.

The EPIC site is "tired" and our challenges will continue given this fact and especially as the ACT Government considers the future of EPIC. All challenges aside, the National will always be the place to meet, the major get-together for folk that encourages exchange between artists and audiences through workshops, sessions, talks and interactive experiences. It will continue to be a highly regarded advocate for the folk arts in all their diverse forms and genres, driving the evolution of folk culture as it explores and redefines its relevance in today's world. At its heart will be the wonderful sense of community, familiarity and inclusiveness that has become the hallmark of our event.

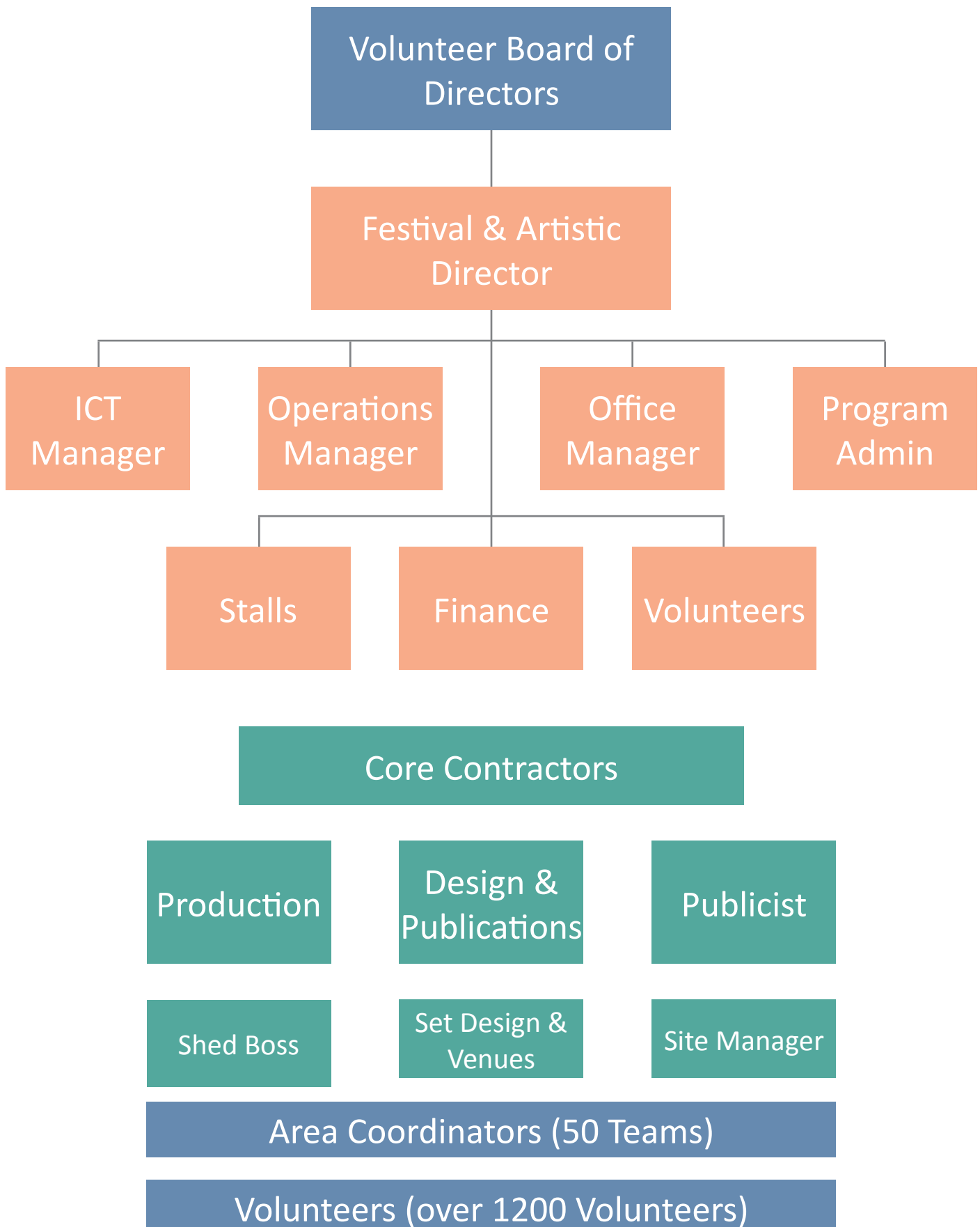
In conclusion, I would like to acknowledge the many people who work throughout the year or play their part behind the scenes to breath life into our wonderful event, our core communities who invest so generously in our Festival and, all our attendees who are part of the community we call the National Folk Festival. I will leave you with a few words from Footprint Sullivan (aka Dari Adamson) past volunteer Festival Office coordinator and long time Festival attendee:

"For me, the best festival for years! Wonderful layout, atmosphere, acts and sessions!"

Pam Merrigan
Festival Director



2017/18 ORGANISATIONAL CHART



COMPANY MEMBERS

National Folk Festival Limited is a non-profit company limited by guarantee. There were 34 Company Members at the end of the reporting year. All Company members are either past or present members of the Board and include the subscribers to the original Memorandum of Association of the Company, former Managing /Festival Directors and other persons with requisite qualifications, skills and experience. Many have also been Festival Area Coordinators or volunteers in other capacities or folk performers. All are long-term Festival attendees. Two new Company Members were admitted in the reporting year [Peter Bayliss and Genevieve Jacobs] and one resigned [David Whitney].

BOARD OF DIRECTORS

The volunteer Board of Directors is elected annually by Company Members, as are the executive positions of President and Vice President. Board Members in the current reporting year (including positions held and the year appointed or reappointed* to the Board) are listed below. The qualifications, skills and experience of Board Members in any given year are detailed in annual Financial Reports.

During the reporting year two new Company Members filled vacancies on the Board – Peter Bayliss on 25 July 2017 and Genevieve Jacobs on 27 February 2018.

Three Board Members left the Board during the reporting year. Rick Kenyon did not seek renomination to the Board at the Annual General Meeting on 10 October 2017, David Whitney resigned on 19 April 2018 and Peter Bayliss resigned on 18 May 2018.

Name of Director	Position	Joined Board	Left Board
Gabrielle Mackey	President	2010*	
Jacqueline Bradley	Vice President	2011	
Ronald Brent	Company Secretary	2013	
Pam Merrigan	Festival & Artistic Director	2013	
Richard Kenyon	Treasurer	2012	2017
Graham McDonald	Ordinary Member	2012*	
Peter Williams	Ordinary Member	2013	
Rob Thorman	Ordinary Member	2015	
Jocelyn Vasey	Ordinary Member	2016	
David Whitney	Ordinary Member	2016	2018
Peter Bayliss	Ordinary Member	2017	2018
Genevieve Jacobs	Ordinary Member	2018	

FESTIVAL STAFF

The Board appoints the Festival Director. The Festival Director appoints all other Festival Staff.



PAM MERRIGAN
Festival Director



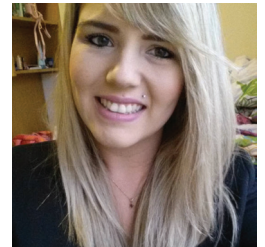
AMY WHITING
Operations Manager



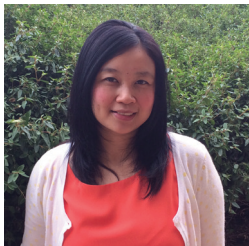
RUBY HUDSON
Office & Special Events Manager



KIM NAVIN
IT Manager



KARLIE MEGAY
Program Administration



PIYA PATTAMARANGGOON
Accounts



JAYNE SIMON
Stalls and Visual Branding



SARAH BOYD
Volunteer Manager



JESS HENDERSON
Design / Publications



KEN FRANCEY
Production Manager



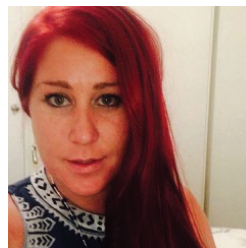
DIANA WOLFE
Publicist / Media



STEPHEN CROSSLEY
Electrical Construction Supervisor



SAMANTHA JARRETT
Shed Boss



VIRGINIA QUIRK
Operations Support and Set Design
Supervisor



BO KITTY
Safety Officer

Staff members (some full-time (F/T), some part-time (P/T), in the current reporting year (including positions held and when commenced/finished in current role) were:

Pam Merrigan	Festival Director	Jul 2013 -	F/T
Amy Whiting	Operations Manager	Jul 2013 -	F/T
Ruby Hudson	Office and Special Events Manager	Jul 2013 -	F/T
Karlie Megay	Program Administration	P/T then F/T	Aug 2014 - F/T
Kim Navin	IT Manager	P/T then F/T	Oct 2014 - F/T
Piya Pattamarangoon	Accounts	Oct 2013 -	P/T
Jayne Simon	Stalls and Visual Branding	July 2016 -	P/T
Sarah Boyd	Volunteer Manager	Nov 2016 -	P/T

Key Contract Staff

Jess Henderson
Ken Francey
Diana Wolfe

Design/Publications
Production Manager
Publicist/Media

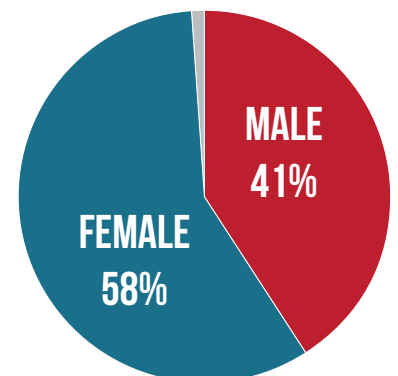
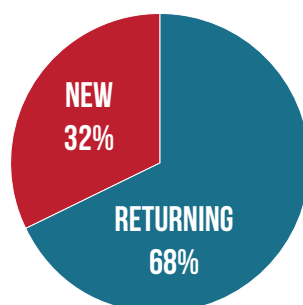
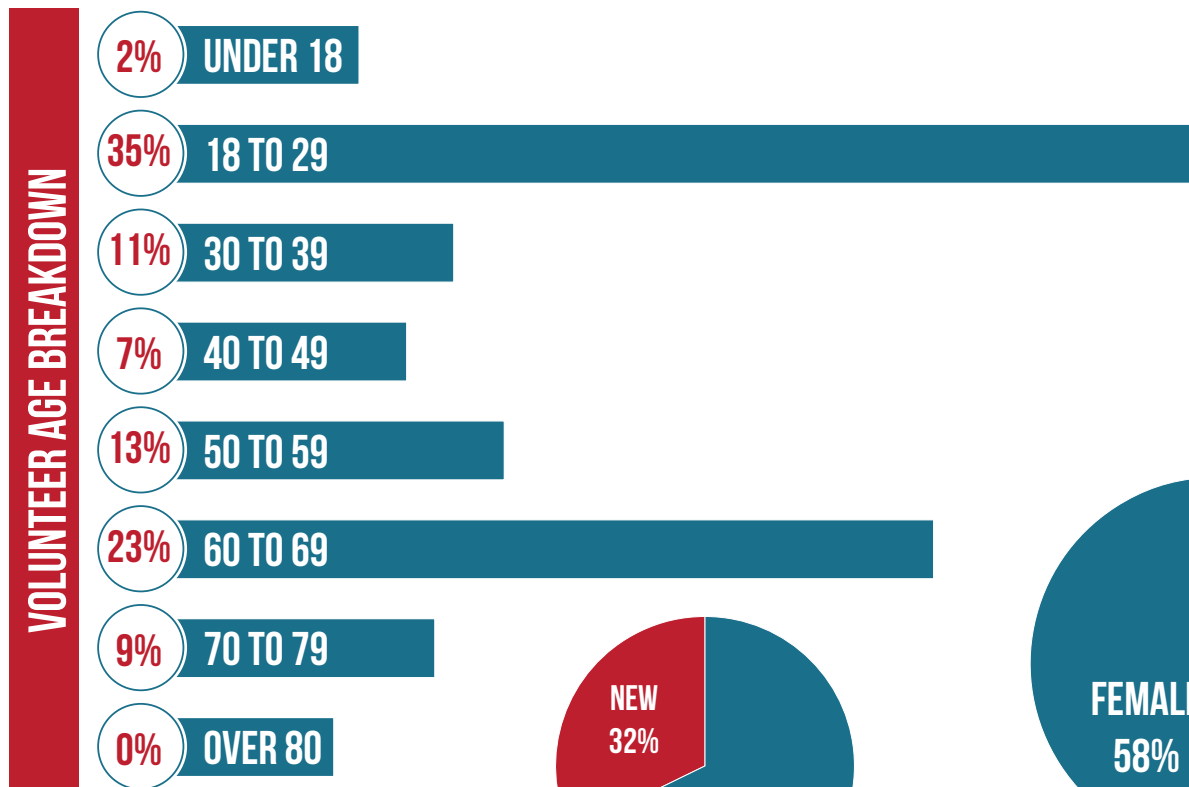
On-site Contract Staff

Stephen Crossley
Sam Barrett
Virginia Quirk
Bo Kitty

Electrical Construction Supervisor
Shed Boss
Operations Support & Set Design
Supervisor
Safety Officer

VOLUNTEERS

The Festival had over 1200 volunteers including over 60 Area Coordinators for major areas of Festival operations who are personally acknowledged in the Festival Program each year. Other persons who give assistance in a variety of ways (including program, site and venue decoration, marketing and photographs) are also acknowledged in the Program. Volunteers are the heart and soul of our festival, and in many ways the festival belongs to the fun loving community minded individuals who decide to get involved and become a part of the Festival Family.



OUR SPONSORS, SUPPORTERS AND PARTNERS

The National Folk Festival had a large number of sponsors for the 2017 Festival who supported the Festival in various ways. We acknowledge and thank them for their valuable support and assistance.

PUBLIC FUNDING PARTNERS



PLATINUM SPONSORS



GOLD SPONSORS



SILVER SPONSORS



BRONZE SPONSORS



MEDIA PARTNERS & SUPPORTERS

HER CANBERRA



DISTINGUISHED PARTNERS



FESTIVAL AWARDS

Recognising achievement and excellence, and nurturing new talent make an important contribution to maintaining a dynamic Australian folk community. The National Folk Festival is proud to host the following awards that are presented to individual artists and groups in recognition of artistic endeavour in folk music, dance and the folk arts.

Congratulations to the following 2018 Award Winners:

National Folk Festival Lifetime Achievement Award

Margaret and Bill Winnett (NSW)

National Folk Festival Volunteer of the Year Award

Judy Baker (ACT) - Pre Festival Registration

National Folk Fellow Recipient 2017

Salvatore Rossano (VIC) - "Sonu" A musical map of Italian music in Australia

Peter J Daly Memorial Award

Trioc (VIC)

Lis Johnston Memorial Award for Vocal Excellence

Sadie Mustoe - Girl on the Hill (VIC)

Gill Rees Young Musicians Award

The Beamish Boys (QLD)

Alistair Hulett Memorial Award

Teri Young (TAS) for her song Fishing at Okehampton Bay

FAA Young Performer of the Year

STAV (VIC)

Traditional Social Dance Association of Victoria Awards

Beat Klippel Memorial Trophy - Keith Wood (NSW) for his Green Apple Quickstep

VFMC Perpetual Trophy - Keith Wood (NSW) for his Eureka

National Folk Festival Reciter of the Year Award

John Peel (NSW)

National Folk Festival Yarn Spinning Award

Dave & Malcolm Upton (NSW)

Blue the Shearer Award for Best Original Poem (NEW)

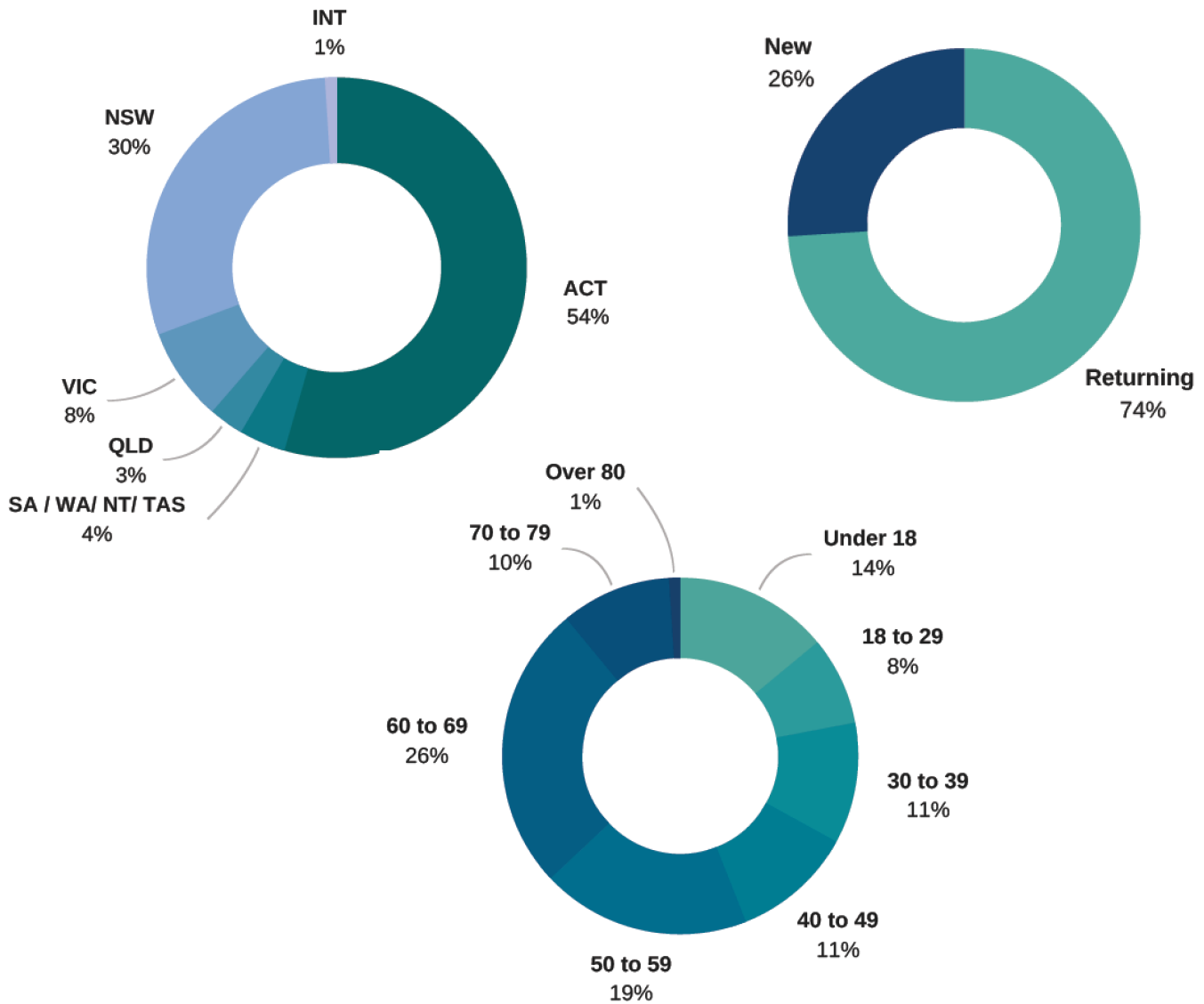
Peter Mace (NSW) for his poem What Price a V.C.

Infinite Song Competition (Infinite David Bowie)

SON Susan O'Neill

2018 FESTIVAL ATTENDANCE AND TICKETING REPORT

In 2018 the National Folk Festival had a total unique attendance of 14581 persons. This is a 2% increase on attendance from the previous year. This information is drawn from our ticketing data base and includes patrons, volunteers, stall holders and performers. Please note that this is different to the demographic shown on page 18 in the IER Report which is only based on the sample surveyed.



THE FOLLOWING PAGES (16-18) CONTAIN INFORMATION FROM THE ECONOMIC IMPACT AND ATTENDANCE RESEARCH REPORT FROM IER

SUMMARY OF KEY FINDINGS

 <p>VISITORS TO THE ACT</p> <p>8,188 visitors encouraged to come to the ACT</p>	 <p>ECONOMIC IMPACT</p> <p>In-Scope Expenditure of \$4.68 million for the ACT</p>	 <p>VISITOR NIGHTS GENERATED IN ACT</p> <p>40,618 visitor nights generated for the ACT</p>
 <p>ATTENDEE EXPECTATIONS</p> <p>26.7% of attendees said that the festival exceeded their expectations.</p>	 <p>ATTENDEE SATISFACTION</p> <p>Overall, attendees recorded a high level of satisfaction (4.3).</p>	 <p>NET PROMOTER SCORE (ADVOCACY)</p> <p>Attendees recorded a Net Promoter Score of +57.2.</p>
 <p>FIRST TIME ATTENDANCE</p> <p>13.7% of attendees at the National Folk Festival were first time attendees</p>	 <p>LIKELY RETURN ATTENDANCE</p> <p>78.8% of attendees at the National Folk Festival said they would be likely to return next year</p>	 <p>TOURISM LEGACY IMPACTS</p> <p>39.9% of visitors said that they definitely would like to return to see more of Canberra after their experience on this trip</p>

BACKGROUND & RESEARCH APPROACH

BACKGROUND

The National Folk Festival was held from 29th March to 2nd April 2018 in Exhibition Park, Canberra. The National Folk Festival is held in the Nation's capital, attracting audiences from around Australia and overseas. The 4-day long weekend allows attendees time to travel and still be able to enjoy the unique elements the event has to offer.

PURPOSE OF THE RESEARCH

IER was engaged by the National Folk Festival to undertake a research study in 2018.

The research study contained a number of elements as outlined below: -

- Quantitative attendee research study
- Quantitative research – stallholders, performers and volunteers
- Economic impact assessment

IER, in consultation with the National Folk Festival, developed the quantitative research tools to undertake this study.

RESEARCH OBJECTIVES

The research study aimed to achieve the following key objectives: -

1. Develop a demographic profile of attendees at the National Folk Festival
2. To provide an estimate of the economic impact generated by the National Folk Festival
3. To measure attendee experience and likely advocacy and return attendance

4. To develop an understanding of key attendee behaviours both prior to and post attendance
5. To gather insights from attendees that can be used to help shape the event for future years
6. To measure the use and usefulness of a number of marketing and communication aspects of the event

RESEARCH METHODS

IER utilised a number of different research methods to deliver this study. They are outlined below:-

1. **Incidence Survey** – IER conducted an incidence survey on all four days across the event period. The purpose of this survey was to develop a detailed and robust assessment of visitor origins (for the purpose of accurate audience profiles).
2. **Online Survey** – An online survey was built and disseminated to those who provided their email details during the incidence survey process.
3. **Economic Impact** – IER conducted a detailed economic impact analysis of both the National Folk Festival. For the purpose of this study, the assessment provides outputs at a direct spending perspective from out-of-territory sources.

BACKGROUND & RESEARCH APPROACH

Throughout the research report, IER has reported findings in aggregate format. Further to this, detailed cross-analysis was undertaken to uncover where any deeper insights may exist – in particular key lifecycle segments.

SURVEY DEVELOPMENT

IER liaised with the National Folk Festival to develop an attendee survey aimed at meeting the objectives of the study. The survey was developed with specific pathways and skip logic to allow for different respondents to see specific sets of questions that were relevant to them.

The survey was built and hosted within IER’s proprietary research system, www.customerdirect.com.au. Invitations were branded with the National Folk Festival creative and were sent by IER to those who opted in to participate in the research.

REPORTING

Throughout the report, symbols have been used in various charts and tables. The red arrow means that the variable is significantly lower than other variables in that analysis. The green arrow means the opposite. Significant results are the function of both a significant difference in the data points as well as sample sizes that are large enough to be statistically confident in the data (this is why in some instance, two variables may appear significantly apart but may not be marked as such).

SAMPLE SIZES

Through the online research process, IER yielded the following samples for use in this study

Both of these samples are statistically significant in their own right (at an aggregate level). The incidence survey was used to collect visitor origins, primary purpose attendances and extended stay.

The on-line survey was used to capture all other insights relating to this research study.

Respondent Type	Sample Size
National Folk Festival Incidence Survey	2,147
National Folk Festival On-line Survey	1,338



2017-18 ANNUAL REPORT



2018 National Folk Festival

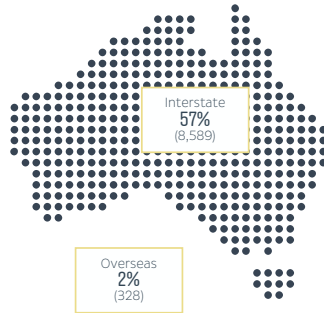
29 MARCH - 2 APRIL



VISITORS TO THE ACT



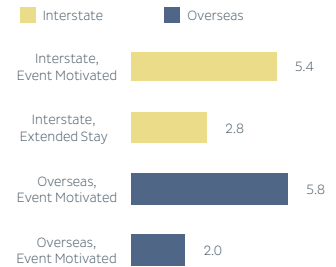
The event was directly responsible for bringing 8,188 individuals to the ACT, who may not have visited if not for the National Folk Festival.



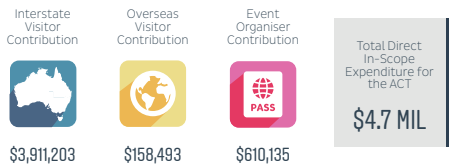
VISITOR NIGHTS



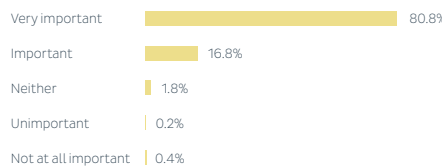
AVERAGE LENGTH OF STAY (NIGHTS)



ECONOMIC & TOURISM IMPACTS



HOW IMPORTANT NFF IS FOR CANBERRA

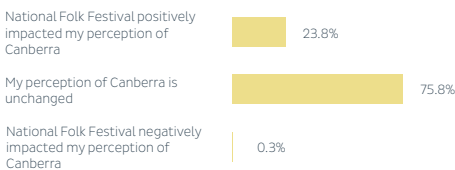


VISITOR QUOTES

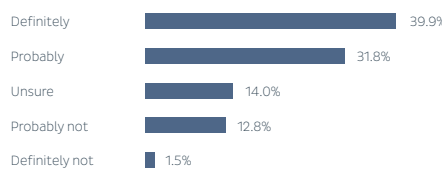
"The new layout for 2018 is excellent and placing more venues up around the Fitzroy. It made it very cosy and much better layout. Great to see NEW bands."
Male, 50-59, QLD

"We love the atmosphere, the poetry and story-telling, the music, and the prospect of discovering a band that gets us up dancing."
Female, 50-59, Canberra

IMPACT ON THE PERCEPTION OF CANBERRA



MADE YOU WANT TO SEE MORE OF CANBERRA



2018 National Folk Festival

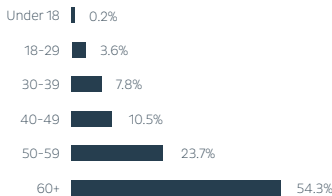
29 MARCH - 2 APRIL



DEMOGRAPHIC PROFILE OF ATTENDEES & PARTICIPANTS

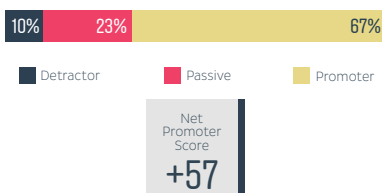


*Note - 1% prefer not to say

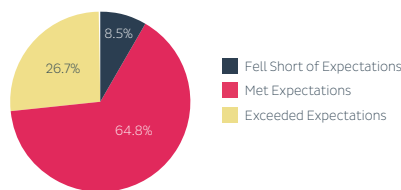


NET PROMOTER SCORE

The Net Promoter Score measures the level of positive/negative advocacy that the National Folk Festival generated amongst attendees and participants. Detractors (0-6) are likely to talk negatively about the event and their experience. Passives (7-8) are likely to be neutral in their advocacy. Promoters (9-10) are likely to positively advocate their experience.



ATTENDEE EXPERIENCE



"I took my mum to the festival as a 60th birthday present as it is her favourite festival."
Female, 18-29, QLD

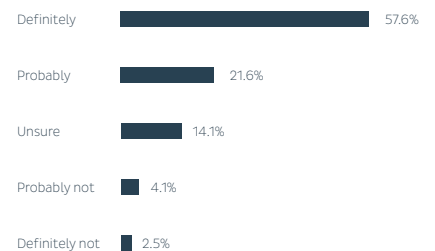
"We just always go to the Festival, it is an annual event in our life!"
Male, 70-79, NSW

OVERALL SATISFACTION WITH THE NFF

(1 = NOT AT ALL SATISFIED, 5 = COMPLETELY SATISFIED)

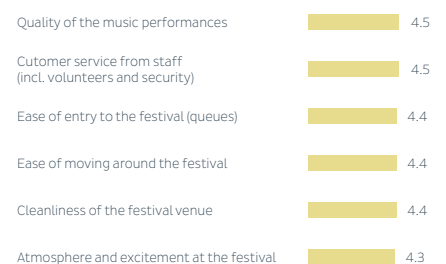


LIKELY FUTURE VISIT



SATISFACTION WITH ELEMENTS OF THE NFF

(1 = NOT AT ALL SATISFIED, 5 = COMPLETELY SATISFIED)



"Love the NFF! Would not miss it. For the atmosphere, the music, the colour and activity."
Female, 50-59, Canberra

A COMMITMENT TO SUSTAINABILITY

The National Folk Festival is committed to producing an environmentally responsible and sustainable event and promotes this message to all attendees.

Continuing the Partnership with Greening Australia – In 2016, to celebrate the 50th National Folk Festival we partnered with Greening Australia to plant 50 Trees for 50 Festivals. \$1.00 from each souvenir program sold over the Easter weekend was donated towards this tree planting. The project was so successful that National Folk Festival and Greening Australia continued this partnership through 2017 and 2018. Greening Australia also extended their presence at the festival, presenting workshops on Propagating Native Plants and Bush Foods. This partnership makes a significant contribution to offsetting our carbon footprint.

Partnering with Actsmart – In 2018 the Festival partnered for a fourth year running with Actsmart, an ACT Government initiative committed to creating a more sustainable future. Initiatives were implemented through this partnership including steps to increase waste and recycling awareness within our Festival community. Our overall waste was lower than in previous years with a decrease from last year of 4 tonnes of waste going to landfill.

Waste Management – On-site three bin types are used: General Waste, Co-Mingled (Recycling) and Organic Waste. Prominent signage at each waste station gives information about recycling and organic waste to encourage the use of the correct bins. Our Waste Team volunteers sort through the bins to ensure waste items are in the correct bins and our Tidy Team keep the Festival site clean by constantly roaming the ET Zone cleaning away rubbish left behind in our public areas.

The War on Plastic Bottles – With support from Tap into Water (ACT Health Directorate), we had 4 water bottle refill stations from onsite, encouraging attendees to bring and refill their own water bottles. We also partnered with We-Refill to introduce further initiatives to reduce the number of plastic bottles on site.

We-Refill - In 2018, We-Refill joined our war on plastic bottles by providing 3 refill water stations. We had one for our general public, one for performers and one for our volunteers. This system uses town water, which goes through a filtration system to create filtered, chilled and sparkling water in an instant. Over the course of the Festival, a total of 4839L of harvested tap water was used, and a total of 7331 single use 660ml bottles were diverted away from landfill.

Oz Harvest – Festival food vendors were encouraged to donate unused produce and supplies to this local service that rescues good food before it goes to landfill. In 2018 three pallets of leftover food including milk, bread, fruit and vegetables were re-distributed to over 55 local charities and refuge centers.



Greening Australia and NFF Staff pictured with trees to be planted as part of the 2018 GA/NFF Partnership.