

2007 Prague Fringe Festival Audience Survey Report

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Executive Summary

Now in its 6th year, the Prague Fringe Festival (PFF) has grown substantially and received a wide range of accolades for its contribution to the city in terms of diversity, creativity and international reputation. In 2007, the directors commissioned its first audience survey in order to aid its future organisation, planning and expansion. While the survey considers the economic impact of the PFF on the city of Prague, the report was primarily commissioned to help the organizers better understand their complex audience, get feedback on what they were saying about the festival, and to use the survey results to relay the wider social and cultural benefits of the festival to its varied constituents.

In total 226 questionnaires were returned representing a sample of approximately 21% of the entire fringe audience so the results are highly representative. Of the total number of respondents, 85% were classified as 'audience only', while 15% were 'audience associated with the fringe' (performers/ volunteers/ workers).

The PFF has a diverse and international audience. 45% of the fringe audience is 'Visitors Abroad', 32% is 'Non-Czech (living in Prague)' and 23% 'Czech'. Within the 'Visitors Abroad' category, 73% were 'audience only' (with 22% 'coming especially for the festival' and 51% 'not coming to Prague especially for the festival') and 27% were 'audience associated with the festival'.

Demographically, 56% of the total audience respondents were female and 44% male (with the largest percentage of women existing within the Czech audience category – 79% as opposed to 21% men). 83% of the total audience fell into the 15-44 year old band, with the largest age group being the 25-34 year old group. Professional and creative occupations were most frequently represented in the audience, as were students. The PFF audience was extremely international with 26 nationalities represented (with American, Czech, British, Canadian and Irish being the largest groups).

Respondents were also asked a range of questions about the PFF. For just under 3/4ths, this was their first visit to the festival, while for the 27% who were returnees the average number of years attended was 2.7. The main source of information regarding finding out about the festival was word of mouth, and 61% of respondents were planning on seeing 2-5 shows. The main method of ticket purchase was at the venue itself (71%), 18% used the main box office and 11% used the internet (Ticketstream).

Over 90% of respondents rated their experience of the PFF as good (with 8% average and 0% rating it poor), while the Czech audience actually had the highest rating of the festival with 98% rating their experience as good. Nearly 90% suggested that they would come back to the festival, with the Czech audience again being most likely to say this (with 98% saying they would return).

Not surprisingly, the vast majority of comments made in the survey were extremely positive, supportive and encouraging and included statements like: 'It's great! Thanks for

coming to Prague' (Czech member of the audience); 'We always have a fab time at the Prague fringe festival'; 'Love this festival'. Additional comments were made about the quality of shows (like 'Really good standard of performances') and the level of festival organization (like 'The level of organization is incredible'). Constructive suggestions included comments on advertising and raising the festivals profile, improving the festival programme and having discounted tickets for various groups (students, retired, child, group and multiple show discounts).

Over seventy percent of the PFF audience from abroad traveled to the city by air, 17% by train, 4% by bus and 4% by car (5% didn't answer). *Easyjet*, was used by 31% of the Visitors Abroad audience, followed by *Czech Airlines* (used by 13%), representing 'adding value' of over 37,000 CZK or £10,000 to these two airlines (people who otherwise would not have traveled to Prague).

The economic impact of the PFF in terms of bring in new money (added value) to the city of Prague is estimated to be in the region of 3.9m to 5m CZK (depending on the mode of calculation). In terms of the grant they receive from Prague City Council, this represents real value for money, with a return of 8 CZK into the local economy for every 1 CZK spent supporting the festival.

In conclusion, the report has implications for how the organizers might strategically think about balancing and boosting all of their constituent audiences. In particular, the 'Visitors Abroad' audience who 'did not come especially for the PFF' might be boosted by better advertising, identifying venues more clearly, and investing in promoting the festival through official tourist information channels. The 'Non-Czech living in Prague' audience could be more specifically targeted through professional and creative organizations and businesses. Most important however, is the need to think seriously about how to attract more of a Czech audience, especially when considering factors like gender, age and occupation/ disposable income. While some of these barriers are beyond the research of the PFF, it is suggested that they might consider discount tickets for groups like students, children, retired and unemployed Czechs.

In addition to considering boosting its various audiences in order to succeed, the PFF also needs to review its funding sources, including raising the levels of publicly-funded support and investigating the possibility of more direct sponsorship money

Background/ Introduction

The Prague Fringe Festival (PFF) was the first of its kind in Eastern Europe, and has recently completed its 6th year of operation. Created by two Scots (one based permanently in Prague) and a Geordie, and based loosely on their involvement in and experience of the ‘grandfather’ of all fringe theatre festivals, Edinburgh, the PFF has grown from 13 companies performing 63 shows over 5 days in 2002 to 41 companies performing 242 shows over 8 days in 2007. Ticket sales corresponding have grown around 1200% from 400 in 2002 to 4806 in 2007. The festival receives extremely positive reviews from the Prague press every year, is supported by Prague City Council (in terms of providing some base funding), and according to its patron, HM British Ambassador to the Czech Republic (CR), Linda Duffield, it is ‘...a great showcase for new theatrical talent from around the Czech Republic and around the world’ (*Prague Fringe Festival Programme*, 2007).

Despite this growth, critical acclaim and financial support from various quarters, the PFF faces a number of challenges. First, in a city of festivals, it is a relatively small and new event which must compete against a range of cultural events for audiences as well as funding (and sponsorship). Second, fringe is a relative new concept in Eastern Europe and there is an important task convincing audiences and existing/ potential funders of its unique benefit to the city and its people. For instance, the endearing spirit of fringe is to celebrate diversity and encourage international dialogue and understanding, yet also challenge, engage and include audiences, taking into account issues of cost and accessibility. Third, in relation to this, because the PFF is in some sense an ‘imported’ cultural phenomenon, it has to carefully think about the balance of its festival programme in relation to a rather complex audience. While the programme in 2007 is clearly international, with 12 different countries represented, and is accessible to a wide audience due to its visual nature, language is a further complicating issue.¹

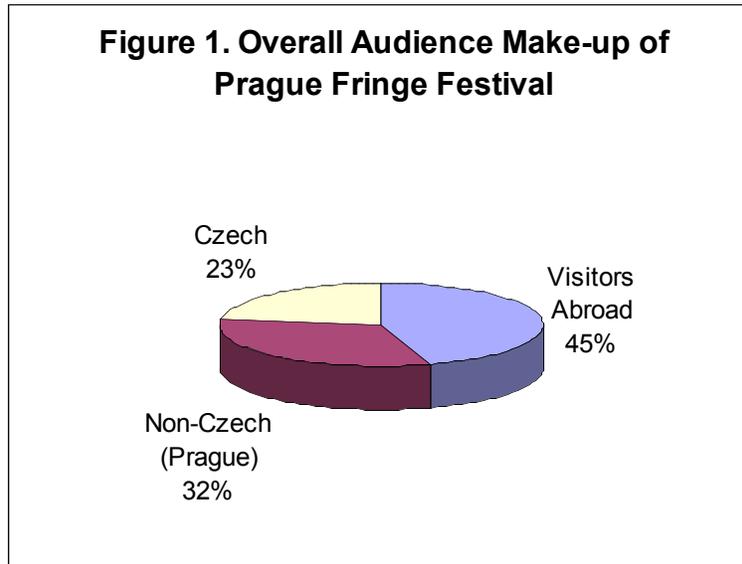
Because of this, the PFF directors decided to commission its first audience survey during the 2007 festival. The work was conducted and overseen by Professor Robert Hollands a Social Scientist at Newcastle University who produced the questionnaire, collated the data and wrote the analyses which follows. While the survey considers the economic impact of the PFF on the city of Prague, the report was largely commissioned to help the organizers better understand their complex audience and to emphasise the wider social and cultural benefits of the festival in terms of inclusion and engagement.

The questionnaire was distributed to audience members at every fringe venue by front of house staff and collected either prior to and after performances. In total 226 questionnaires were returned representing a sample of approximately 21% of the entire fringe audience.² The majority of questions required a tick box answer, although there was also space for written comments. If a question was left blank a Non-Response (or NR) was recorded so total numbers will not always be 226 and sometimes the report refers to percentages in terms of those who answered the question rather than the total number of respondents.

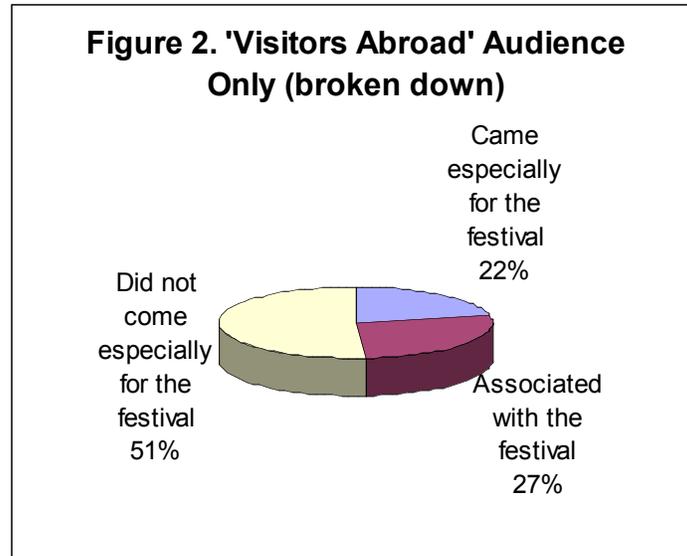
Results

Audience Make-up of the PFF

One of the claims of fringe is its capacity to attract a diverse range of audiences and this is no less true for the PFF than many other fringes. In fact, located as it is within a very cosmopolitan city, made up of local and ‘ex-pat’ communities³ and a truly international tourist base,⁴ it might be argued that it is much more an international fringe than say those held in North American (Canada and the US) and Australia, even rivaling Edinburgh (for instance while 15% of Edinburgh’s festival audience is from overseas - see SQW Limited and TNS Travel and Tourism (2005) - the figure for PFF is three times this). In terms of the overall audience there are three broad groups represented. ‘Visitors Abroad’⁵ make up 45% of the sample, ‘Non-Czech Living in Prague’ (32%) and ‘Czech’ (23% - of this group 95% reside in Prague). Another way of expressing the figures here are the sample is made up of 45% ‘Visitors Abroad’ and 55% ‘Czech and Non-Czech Living in Prague’.



A more detailed breakdown of the audience make-up can be made by further separating the ‘Visitors Abroad’ category into three distinct subgroups (see Figure 2 below) – an ‘audience associated with the festival’ (27% including performers and fringe volunteer workers), and two ‘audience only’ groups, one whom ‘came especially for the fringe’ (22%) and one who ‘did not come especially for the fringe’ (51% of the total of ‘Visitors Abroad’). As the ‘Non-Czech (living in Prague)’ and ‘Czech’ respondents were predominately ‘audience only’ (93% and 96% respectively), the report does not make any distinctions within these two audience categories. Overall, 85% of respondents were ‘audience only’ and 15% were ‘audience associated with the fringe’. When there are significant differences in answers or characteristics between and within these various groupings, we draw attention to this in the analyses.



Audience Demographics

The survey asked a number of background/ demographic questions of its audience including their gender, age, occupation and nationality in order to measure its diversity. While the report generally provides overall figures and a breakdown into the three main audience categories ('Visitors Abroad', 'Non-Czech Living in Prague' and 'Czech'), when there are significant differences within the 'Visitors Abroad' category, these are also mentioned or included within the various Tables.

In terms of gender, 56% of audience respondents were female and 44% male. This slight gender imbalance is consistent with the gender composition of other fringes (i.e. Arts Management Program, 2002). While females outnumbered males in a number of audience categories the difference was most significant in the 'Czech' audience, while the trend was slightly reversed in the 'Non-Czech Living in Prague' audience, and least striking in the 'Visitors Abroad' audience. As Table 1 below shows, 79% of the Czech audience was female as opposed to 21% male, while in the Non-Czech audience this trend was reversed (though not so strongly) with 56% males and 44% females. The 'Visitors Abroad' audience was close to half and half with males slightly ahead with 53% to 47% females. While this demonstrates that the PFF is generally open to all genders (or else there would be a common trend across all audiences), the most significant imbalance concerns the Czech population, which appears to suggest that the festival does not appeal as well to local men. A study by Crompton (1997) cites a national attitude survey which shows that Czech men appear less open to new ideas (including how they think about gender roles), as opposed to Czech women, which may form part of the explanation of these findings here.

Table 1

Gender Composition of PFF Audience

	Female	Male
Visitors Abroad	53%	47%
Non-Czech (living in Prague)	44%	56%
Czech	79%	21%
TOTAL AUDIENCE	56%	44%

Age-wise, the festival attracts a wide age-range (from under 15 to over 60), but with the 15-44 year old bands most well represented (83% of the total). Overall, 38% of the audience fell into the 25-34 year old band, while a further 24% and 21% were in the age-groups 35-44 and 15-24. Again, this is fairly consistent with findings from other festivals and fringes, with them being popular with young students, artists and middle-age professionals (i.e. SQW Limited and TNS Travel and Tourism, 2005; also see the table concerning occupation below). Least well represented are the under 15s – not surprising perhaps as the PFF does not explicitly provide shows for younger children. While older age-bands are less represented, with 45-59 and 60+ groups making up 8% and 6% of the audience respectively, these figures are not widely different than say Edinburgh’s various festivals (SQW Limited and TNS Travel and Tourism, 2005).

Perhaps a partial explanation of a falling off of the age profile here concerns older Czech’s confidence understanding the English language, as a substantial proportion of the PFF programme is in English. The only significant age differences with the different audience segments worth noting are a higher percentage of young people (15-24) associated with the PFF (39% including performers and workers/ volunteers) and a higher percentage of Czech audience in the younger age bracket (27% of the Czech total as opposed to 21% in the 15-24 year old bracket). This younger age profile here, combined with data on gender and occupation (including students, see below), means that an important section of the Czech audience are young, female students.

Data collected on occupation is an important indicator of diversity and accessibility. While fringe historically has its roots in accessibility, rising prices at some festivals means that what was once considered to be open, is now increasingly becoming beyond the means of some sections of the population. Average ticket prices at Edinburgh’s fringe have now risen over £10 on average, despite some free events. Additionally fringe once meant the possibility of seeing multiple shows (the average in Edinburgh is still 4.52 - see SQW Limited and TNS Travel and Tourism, 2005), so this means an outlay of £45 not counting accommodation and food. Ticket prices at PFF may look very reasonable for visitors and some ‘Non-Czechs (living in Prague)’ on western salaries at 150 CZK (around £4), but in

terms of average wages in the CR (around £650 a month in Prague), ticket prices for the PFF are relatively higher than Edinburgh (where the average monthly wage is approximately £2500 a month, thereby making Prague tickets the equivalent of £15 in Edinburgh terms).

In terms of the occupation of PFF audiences overall, just under 50% fell into the category of Professional, 19% Creative and 18% Student, with 5% of the audience retired. Technical workers were 3%, Office workers 2%, Home Duties 2% and 0.4 were Unemployed (the remainder were 'Other'). At least part of the explanation for the high percentage of Professional workers from the 'Visitors Abroad' audiences may be connected to the link between social class, income and propensity to travel and consume cultural events, while the high percentage of Creative occupations was typical of almost all groups (i.e. creative people like to consume creative culture). Similarly, not many unemployed people are likely to be traveling abroad to Prague, nor are its own unemployed likely to be able to afford a fringe ticket. Comparisons with other fringes around the world prove difficult as studies use different occupational categories and indicators, but PFF is fairly consistent with other fringes in terms of accessibility.

Yet, within different audience categories, there were some significant variations. While the percentage of Professionals with each category was relatively consistent, the highest percentage of Students was found in the Czech audience (37% or more than double the norm), while the highest percentage of Creative occupations (54%) was found, not surprisingly, in the Visitors Abroad 'audience associated with the festival' category (i.e. performers and workers/ volunteers at the festival). The Czech audience also had the highest percentage of Home Duties (housewives) and Retired (4% and 8% respectively). While this is an improvement on the overall figures, regarding the Czech audience as a whole much more could be done to bolster different sections of the audience and attract new potential audiences. For instance the PFF might consider a discount price ticket for various groups (see the discussion in the conclusion).

Finally, the survey asked audience members to indicate their nationality. Here the PFF displays that it is a truly international festival in terms of its audience. Overall, 26 different nationalities are represented here, including Czech. Nine nationalities are represented within 'Visitors Abroad who came especially for the festival', 14 represented in 'Visitors Abroad who didn't come for the festival' and 7 for 'Visitors Abroad who were associated with PFF', while 19 nationalities were represented in the 'Non-Czech Living in Prague' audience, displaying what a cosmopolitan city it is.⁶ Table 2 shows in descending order the overall numbers of each nationality represented in the audience survey, with Americas leading the way (with 57 respondents), Czechs' (52), followed by British (42), Canadian (15) and Irish (10). Added to this, 12 nationalities represented on the festival programme, and you have a truly international event in a very international city.

Table 2

Nationalities Represented in the PFF Audience Survey

American 57	New Zealand 4	Belgian 1
Czech 52	Danish 3	Chinese 1
English 42	Italian 3	Croatian 1
Canadian 15	Russian 3	Dutch 1
Irish 10	Finnish 2	Israeli 1
Australian 6	Slovenian 2	Japanese 1
French 5	Spanish 2	Philippine 1
Scottish 5	Swiss 2	Ukrainian 1
German 4	Austrian 1	(26 nationalities in total)

Views on the PFF

In addition to demographic information, the questionnaire also asked a number of questions soliciting views about the Prague fringe.

Firstly, we asked whether it was respondents' first visit to the PFF. Almost three-quarters (73%) replied yes, while 27% replied no (see Table 3). Of those whom it was not their first time, the number of years they had attended the festival was 2.7 years. What these figures imply is that while the majority of people are still discovering the festival for the first time, there is a solid audience base who have attended nearly half of all festivals (i.e. the festival has run for 6 years and the average number of attendances was nearly 3).

Table 3

Nature of Attendance at the PFF

First Time at PFF Been Before (Number of Yrs)

Visitors Abroad:

'Came especially for the festival'	55%	45% (2.9 yrs)
'Didn't come especially for the festival'	90%	10% (4.0 yrs)
'Associated with the festival'	82%	18% (2.6 yrs)
Non-Czech (living in Prague)	56%	44% (2.6 yrs)
Czech	83%	17% (2.4 yrs)
TOTAL AUDIENCE	73%	27% (2.7 yrs)

However, between and within audience categories there were some significant differences (see Table 3 above). For instance, while the general category of 'Visitors Abroad' there was a vast (and expected) difference between the sub-category of 'came especially for the festival' and the 'didn't come especially for the festival', with only 55% of the latter being first timers, while 90% of the latter group were first-timers. This shows that while there is a small and dedicated number of Visitor Abroad who plan and attend the festival regularly (almost 3 of the 6 years), the majority of this audience finds out about the festival while in Prague and attend for the first time. In terms of Visitors Abroad 'associated with the festival', 82% attended for the first time and 18% returned, the latter figure reflecting a small dedicated set of returning volunteers/ workers and the former reflecting a high turnover of shows every year (i.e. only a small number of performers and companies have played Prague more than once).

Yet, the major contrast comes when we compare the 'Non-Czech (living in Prague)' audience and the 'Czech' audience. For example, the 'Non-Czech' audience is in fact almost identical to the 'Visitors Abroad who came especially for the festival' audience, with only 56% first timers, while 83% of the Czech audience were first-timers. What this implies is that there is significant minority (44%) of 'Non-Czech's (living in Prague)' who have attended previously, and like the 'Visitors Abroad who come especially for the festival', are a dedicated cohort who actively look forward to the festival annually. The Czech audience by contrast still appears to be a very new one, with only 17% attending the PFF previously. As we shall see below this difference appears not to be related to either levels of satisfaction or to how audiences find out about the festival. Speculatively, it may have to do with a greater understanding of what fringe is amongst the Non-Czech as opposed to the Czech audience, or the fact that the Non-Czech audience is hungry for English-speaking theatre in Prague (many being American or British).

In terms of assessing marketing strategies, respondents were asked 'How did you find out about the Prague Fringe Festival?' (listing the main source of information only). As Table 4 (below) indicates, overall, knowledge of the festival is very much still through 'word of mouth' (although only 42% of the sample said this, this was over three times as high as any other category). Clearly, this was the major source of information for 'Visitors Abroad who either came especially for the festival' (labeled CE in Table 4) (73%) and those who were 'associated with the festival' (labeled AWF in Table 4) (71%).

Most informative however are how 'Visitors Abroad, who didn't come especially for the festival' (labeled DCE in Table 4), the 'Non-Czech (living in Prague)' and the 'Czech' audience found out about the festival. Surprisingly in terms of Visitors Abroad who didn't come especially for the festival, word of mouth was still the highest category (yet only 25%), followed by internet (19%) and newspaper/ magazine coverage (15%). Some also came across festival programmes in cafes (12%), while almost an equal percentage stumbled across the festival (under Other category). Interestingly, few mentioned seeing posters in the metro/ tram and none mentioned coming across the fringe at the tourist office (due to the festival not promoting itself there due to financial reasons). A number

of Visitors Abroad expressed shock that there was no information (and no knowledge) about the festival at the main city tourist office.

Table 4

Main Way Audience Found Out About the PFF

	Visitors Abroad			Non-Czech	Czech	TOTAL
	CE	AWF	DCE			
Word of Mouth	73%	71%	25%	44%	27%	42%
Internet*	4%	7%	19%	14%	13%	13%
Newspaper/ mag**	4%	0%	15%	13%	10%	10%
Programme in café	0%	0%	12%	10%	15%	9%
Other***	4%	14%	13%	4%	6%	8%
Metro/ Tram advert	4%	0%	8%	4%	13%	7%
Poster	4%	0%	6%	4%	6%	4%
Non-response	7%	7%	2%	7%	10%	6%

Legend: CE- Audience came especially for the festival; AWF- Audience associated with festival; DCE- Audience who didn't come especially for the festival; * A number of respondents mentioned expat.cz as an internet source; ** A good number of respondents mentioned the *Prague Post* and a few mentioned the Easy Jet in-flight magazine; *** Other ways included stumbled across festival; partner in show; newsletter in hotel etc.

Note: Not all columns will add up to 100% due to rounding.

Regarding the 'Non-Czech living in Prague' audience, word of mouth communication about the festival was very dominant (44%), followed by internet (14%), newspapers/ magazines (particularly the *Prague Post*) (13%) and programmes in cafes (10%). This suggests that there are particularly good word of mouth and electronic channels of communication for this audience sub-group (common meeting places, websites like expats.com etc). Finally, word of mouth was still the top method of finding out about the PFF for the 'Czech' audience (although it was far less important than for 'Non-Czechs living in Prague'), with 27% saying this was their main method of finding out about the PFF, while 15% found out through programmes in cafes, 13% from the internet and 13% through metro/ tram adverts. If we include metro-tram adverts and posters together, nearly 20% of Czech's found out the festival this way, the highest of all sub-groups, suggesting that for this audience this method of advertising is still important. Also, if we add together the metro/tram adverts plus posters for the 'Visitors Abroad' audience it is 14%, the second highest for all sub-groups, showing its importance for them, although they were more likely to have found out about the festival via the internet and/ or newspapers/ magazines.

In order to calculate overall audience size (needed to calculate economic impact – see below), respondents were asked how many fringe shows they planned to see.⁷ As Table 5

reveals, the majority of respondents (61%) planned to see 2-5 fringe shows. Fourteen percent planned to see just one show, 13% planned to see 6-10 shows and a dedicated 12% planned to see 10+ shows. Two die-hard fans indicated that they had already bought tickets for 30 of the 41 shows, but this was very untypical. Taking the midpoint average within categories, the average number of planned shows per person was 4.5.

Table 5

Number of Shows Audience Members Planned to See at the PFF

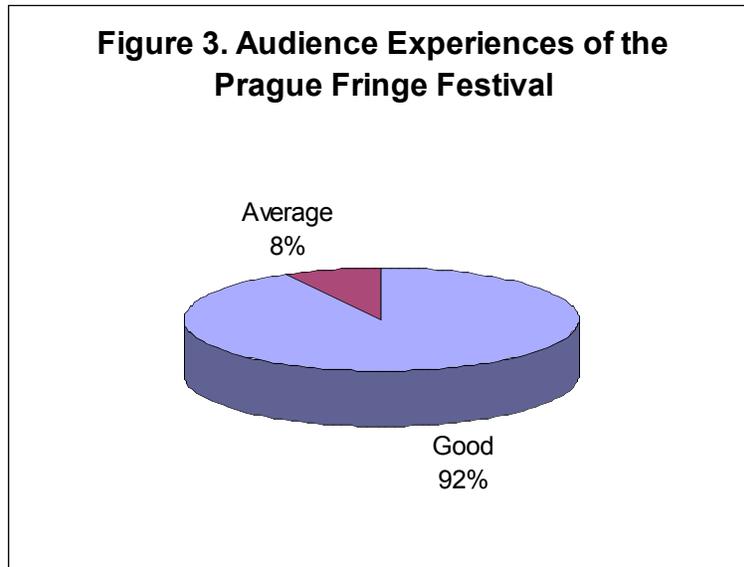
	1	2-5	6-10	10+
VA- CE	14%	27%	36%	23%
VA -AWF	4%	39%	21%	36%
VA- DCE	21%	69%	4%	6%
Non-Czech	11%	63%	18%	8%
Czech	14%	77%	2%	6%
TOTAL	14%	61%	13%	12%

Legend: VA – Visitors Abroad; CE – Audience who came especially for the festival; AWF- Audience associated with festival; DCE – Audience who didn’t come especially for the festival

However, there were some significant differences between and within audience categories. Within the ‘Visitors Abroad’ category, nearly 60% of those who ‘came especially to see the festival’ and ‘those associated with PFF’ planned to see 6+ shows (23% and 36% respectively planned to see 10+). In contrast, only 10% of ‘Visitors Abroad who didn’t come especially for the festival’ saw 6+ shows (the vast majority – nearly 70% saw 2-5). Part of this difference is accounted for by the fact that those who came especially for the festival obviously planned to see a good number of shows and volunteers associated with the festival are allowed into shows without payment.⁸ There was also a significant difference between the ‘Non-Czech Living in Prague’ and ‘Czech audiences’, with 26% of the former group planning to see 6+ shows, while only 8% of latter planned to do so. Again, this indicates a difference between the two groups, which may be either cultural (not getting the fringe idea of seeing multiple shows in a day) or economic (not being as able to afford to see a range a shows).

The main method of ticket purchase were at the venues themselves (71%), which is in keeping with the spontaneity and accessibility philosophy of fringe theatre, with 18% getting tickets from the main box office (Na Pradle one of the festival theatre venues) and 11% from the internet through Ticketstream. One significant difference to note within audience groupings, were that ‘Visitors Abroad who came especially for the festival’ were most likely to plan their festival by using the main box office (25%) and book through Ticketstream (also 25%). ‘Non-Czech Living in Prague’ audiences also utilized the Main Box office more (24%) and used Ticketstream (16%), while only 10% of the ‘Czech’ audience used the Box Office to buy tickets, while 14% used Ticketstream.

Respondents were asked to rate their experience of the PFF as good, average or poor. An overwhelming 92% rated their experience as good, with 8% average and 0% poor (see Figure 3). While ratings were overwhelmingly good for all audience sections, the Czech audience actually had the highest rating of the festival with 98% saying they rated it as good. So, despite issues of wanting to increase this audience and make sure the content of the festival appeals to Czech people (including language issues), it is clear that for those attending, the festival is rated very highly.



Respondents were also asked if they would attend the PFF again in the future. Again, overall a high percentage said yes (86% of the sample). Not surprisingly, for ‘Visitors Abroad’ this figure was lower (76%), as many were unsure they would be returning to Prague, however, 95% of those ‘who came especially for the festival’ said they would return (not surprisingly), and 89% ‘associated with the festival’ said they would, indicating a good experience was had by performers, companies and volunteers/ workers. Most significant however was the response of the ‘Czech’ audience, of which 98% said they would attend again, while 92% of the ‘Non-Czech Living in Prague’ audience said they would return.

The survey also contained a comments box for respondents to fill in. While comments were varied in nature, all were extremely positive, supportive and encouraging. The comments box also encouraged respondents to make ‘constructive’ suggestions. While not all comments can be reproduced here we group responses into ‘present comments’ about this year’s festival, and future suggestions. Below we reproduce a ‘selection’ of the ‘present comments’ in Box 1. Comments are grouped around general descriptions of audience members’ positive experiences, assessment and quality of the shows and praise for the festivals level of organization.

Survey Comments About the Prague Fringe Festival 2007

General positive comments:

‘It’s great! Thanks for coming to Prague’ (Czech member of the audience)

‘We always have a fab time at the Prague fringe festival’

‘Love this festival’.

‘Thanks, a perfect experience’ (Czech member of the audience)

‘Better than ever...An excellent annual event’

‘FANTASTIC’

‘Great – looking forward to next years show’ (Czech member of the audience)

‘We will definitely stay some more days next year’

‘Fringe is an excellent happening’

Performances:

‘Really good standard of performances’.

‘I think the Fringe festival has a great range of shows each one fresh and different than most theatre. Keep up the good work’.

‘Fabulous first show – everyone is coming out smiling at one another’

‘Very good shows so far’

Festival Organisation:

‘Terrific event. The level of organization is incredible. I plan to come back as often as possible’

‘Impressed with the organisation of the festival: good for performers and audience’

‘Keep up the excellent work and production’

‘Excellent website this year’

The survey also invited suggestions about improving the festival. These were grouped around a number of themes including improving publicity, suggestions regarding the festival programme and possibilities regarding ticket discounts.

Regarding publicity, it was felt that the festival needed a higher profile in the city. Comments like 'More publicity/ posters' and 'More posters at Metro stations', and 'Could be advertised better' were common. In particular, it was noted that the main tourist office knew little or nothing about the fringe, with a typical comment being 'Not enough marketing (tourist information knew nothing)' and 'No programmes in tourist information'. Unfortunately there are more restrictions in Prague regarding posting and flyering and the main tourist office charges for distributing event information (though this cost might be considered an investment in the future). Other suggestions included bring back the parade (used in previous years to publicise the start of the fringe), use more free street theatre or public snippets from performances to draw attention to the festival, advertise in the *Easy-Jet* magazine (in fact the PFF was the number 2 destination in Europe in the May in-flight magazine) and catch people's attention at the airport itself with programmes and advertising. Another suggestion was to adopt a fringe colour and decorate the venues in colourful banners which might help raise the fringe profile and help audience locate venues more easily (a common idea used in Canadian fringes).

A second set of suggestions were made around festival programmes regarding availability and usability. Regular festival goers mentioned that it would be great if the programme was more easily accessible earlier. One mentioned that it might be e-mailed directly to those on a mailing list and another felt that it would be more useful as a pdf file. Others comment on the usability of the programme: 'Please make the programme easier to use (i.e. easier to write in and read)...and website address in BIG LETTERS!' and 'Add a planning tool to the programme'. The programmes' black background in 2007, however attractive, made it difficult to write in and circle shows and a few mentioned that it made it harder to read.

Finally a third theme concerned the idea of ticket discounts and being able to buy a 'basket' of tickets cheaper. Comments like 'Would love group/ student discount' and 'Lower rates for children' were made, while another mentioned 'Tickets are pricey for expats earning a Czech salary'. The issue of ticket price levels for Czechs was raised earlier in the report and the idea of discounts for various groups such as students, unemployed, retired and children was also mooted in terms of maintaining a diverse audience. Additionally, regular festival-goers and multiple ticket buyers also felt that there could be some kind of loyalty scheme or discount for bulk buyers, like a festival pass (again common in Canadian festivals).

Visitors Abroad and Economic Impact

A number of survey questions were directed specifically at the 'Visitors Abroad' audience in order to try to calculate the economic impact of the PFF on the economy. This included whether they had come to Prague specifically for the PFF, how they got there, what other activities they were involved in, how many nights they stayed and how

much money they spent on an average day. Economic impact studies are fraught with methodological problems and are often highly complex using various economic formulas to account for double counting (i.e. money that would have been spent in the city anyway), dealing with income (include receiving council grants and sponsorship) and expenditure, as well as multiplier effects (influences on sectors outside the arts) (see Snowball and Autrobus, 2002). Additionally, some have argued that there is too much emphasis on economic impact and not enough on social and cultural impact (ibid; also see SQW Limited and TNS Travel and Tourism, 2005). Below we provide a relatively conservative assessment of the PFF's economic impact on the city, bearing in mind that much the information preceding this section has highlighted its social and cultural impact (i.e. inclusion, diversity and creativity).

Within the 'Visitor Abroad' audience (45% of the total PFF audience), 49% came especially for the festival, while 51% did not. In terms of assessing economic impact it is the 49% that is particularly important (as this is pure added value), although there are examples and formulas for calculating some spending by those who have attended festivals yet not traveled specifically for them (i.e. this group clearly spends money on festival tickets, and perhaps other items such as a drink or a meal before the event, or they may for instance extend their stay when they find out about an event). Additionally, although it is generally recognized that local resident spending should not be counted (as they would have spend the money on something else in the city anyway, so no added value), the Adelaide fringe festival 2002 economic impact survey, for example, calculated a spend for residents of about 1/3 of that of visitors.

Here, we focus specifically on the Visitors abroad who came especially for the festival in providing a value added calculation (minimum impact), while speculating on further spending of other groups (maximum economic impact). Furthermore, of the 'Visitors Abroad group coming specifically for the festival', it is important to note that 44% were classed as 'audience only' while 56% were 'an audience associated with the festival'. When it is significant, differences between these groups will be mentioned (for instance in terms of money spent and number of nights stayed), however, it is imperative to note that the 'audience associated with the festival' is as much of a economic benefit and tourist category as any other audience, with performers spending on seeing other shows and being tourists as well as temporary workers. For instance there were few significant differences between the activities undertaken by those who came especially for the PFF and those who didn't, in terms of sightseeing, shopping, eating and drinking (the mainstay of traditional tourist activities), the main exception was the former groups lack of time to do as many 'other cultural activities' (i.e. performers and workers had restricted time to do as many tourist things and audiences who came especially for the PFF were busy seeing those shows).

Before turning to the festivals economic impact on the city, first, we look at the impact of the PFF on boosting transport, particularly with regard to air travel. In terms of how the Visitors Abroad audience traveled to Prague, overall it's pretty much of a flying culture. Seventy percent traveled to the city by air, 17% by train, 4% by bus and 4% by car (5% didn't answer). Table 6 below shows the most frequently used airlines and the percentage

market they have when it comes to the fringe audience. While there were a large number of airlines mentioned, by far and away the most well used was *Easyjet*, which was used by 31% of the Visitors Abroad audience, followed by *Czech Airlines* (used by 13%). However, when we extract out the audience who came especially for the PFF and those associated with the festival, *Easyjet's* share of the market is raised to 41% of the total fringe audience (Czech airline remains at 13%).

Table 6

Main Airlines Flown on by PFF Visitors Abroad Audience

Airlines	No. of passengers flying	% of PFF Flyers
Easy Jet	22	31%
Czech Airlines	9	13%
Thompson Holidays*	4	6%
Jet 2 Com	3	4%
Smartwings	3	4%
Sky Europe	3	4%

Air France, American, KLM, LOT, United (2 passengers 3% of total flyers); Air Canada, Air Lingus, Globespan, Ryanair, and Swiss Air (1 passenger 2% of total flyers)

* Some respondents listed their holiday company rather than airline flown

Extrapolating from our representative survey sample we can roughly calculate the economic impact the PFF has had on creating business for these two major airlines. Of the 235 Visitors Abroad coming especially for the fringe or associated with the fringe (based on 22% of total audience of 1068),⁹ we know that 78% flew (producing a total of 183 passengers). Of this group we know 41% flew *EasyJet* and 13% flew *Czech Airline* meaning the PFF generated ticket sales of 75 for the former and 24 for the latter airline. Based on a conservative estimate of £100 for *EasyJet* flights, this totals £7500 for the airline, while at £120 a flight it generates £2880 for *Czech Airline* (giving an overall total of £10,380). So it can be seen here that the PFF generates real added value (however small, these are seat sales additional to those that might have come otherwise) to a number of airlines, before audiences have even landed in the Czech Republic.

In terms of calculating the minimum added value of the PFF to the Prague urban economy, we need to know how many nights audiences who have come especially for the PFF spend in the city and what is their expenditure. Overall, the data on the 'Visitors Abroad' audience as a whole shows that the average nights stay was 6.8 nights, while the average daily spend (including accommodation, food/ drink, transport, tours etc) was 2050k (around £55). These figures compare well against 2003 figures which suggest that the average stay of tourist generally in Prague is 3.9 nights and spend is \$61 US a day (about £30) (see Hollands, 2005).

However, in order to provide a more accurate calculation of economic impact we need to separate out the figures of those who came especially for the PFF (including ‘audience only’ and ‘audience associated with the festival’), from those ‘who didn’t come especially for the festival’. When we separate out those ‘Visitor Abroad audience only’ who came especially for the festival from those who didn’t, we see that their average length of stay was 5.4 nights for the former compared to 5.0 for the latter. Furthermore, those ‘Visitors Abroad who were associated for the festival’ stayed 10.6 nights reflecting the need for performers and workers to arrive prior to the 8 day festival regarding the need for rehearsals etc. While there was little difference in the spending power between those ‘Visitors Abroad audience who came especially for the festival’ and ‘those who didn’t’ (2240 CZK compared to 2500 CZK), ‘those associated with the festival’ spent on average only 1170 CZK a day (note that this reflects not only the financial position of struggling artists, but also some volunteer workers who have their accommodation costs covered by the festival).

Extrapolating from our 21% representative sample, the audience ‘added value’ component of the festival to the Prague economy from ‘those that came especially for the festival’ and those ‘associated with the festival’ comes to a total of 2.9m CZK (see Table 7 below).

Table 7

Calculations of the ‘Added Value’ of the PFF to the Prague Economy

104 ‘Visitors Abroad audience coming especially for the festival’ x 2240k x 5.4 nights = 1,257,984 CZK

132 ‘Visitors Abroad associated with the festival’ coming especially for the festival x 1170k x 10.6 nights = 1,637,064 CZK

This gives an audience ‘added value’ to the Prague economy of 2.9m CZK (or approximately £78,224).

Plus ‘Visitors Abroad who didn’t come especially for the PFF’ (3 tickets per person at 150 CZK per ticket x 246 people) = 110700 CZK

Plus spending on 4 tickets on average (or 600 CZK) for the 340 ‘Non-Czech audience living in Prague’ = 204000 CZK)

Total audience spend ‘added value’ = 3.2 m CZK

Plus PFF expenditure in the local economy minus fees paid to performing companies and the Prague City Council grant = .7 m CZK

TOTAL overall ‘added value’ to the Prague economy = 3.9 m CZK

However, we can reasonably add some additional audience sums here. First, we can conservatively add something from those 246 ‘Visitors Abroad’ who ‘didn’t especially come for the festival’ and the ‘Non-Czech living in Prague’ audience. While it is often argued that spending by tourists who didn’t come for the festival or those resident in a city shouldn’t count as ‘added value’ (because they would have spent the money in Prague on something else), a special case can be made for the PFF. The rationale here is that because there is little or no English-speaking theatre in Prague outside of the fringe, the money that was spent here that couldn’t have been spent on a similar activity. So conservatively we can add another 110700 CZK from ‘Visitors Abroad who didn’t come especially or the PFF’ (3 tickets per person at 150 CZK per ticket x 246 people). Additionally, one can (on the same logic as above) include spending on 4 tickets on average (or 600 CZK) for the 340 ‘Non-Czech audience living in Prague’ (totaling 204000 CZK), raising the ‘audience added value’ to 3.2m CZK to the local economy. Finally, in terms of multiplier effects (money the PFF spends in the local economy putting on the festival – i.e. hiring Czech theatres, equipment and Czech labour etc, minus payment to theatre companies performing at the fringe and the Prague City Council grant) we can add another .7m CZK giving a total of 3.9m CZK in terms of overall added value to the Prague economy (see Table 7). However, it is important to say that this is the most conservative estimate of added value and if one adopts the Adelaide Fringe Festival model (which counts local spend) the overall figure would probably be in the region of 5m CZK generated. As a ratio of money added to the economy in terms of grant provided, this represents excellent value for money, with approximately 8 CZK coming into the city for every 1 CZK funding provided by Prague City Council (an 800% return).

Conclusions/ discussion points

This report has provided a detailed and in-depth analyses of audience make-up, demographics and views/ experiences of the PFF. As such it can act as a valuable tool to evaluate future organizational change and assess priorities for the PFF, as well as aid in planning, marketing and strategy discussions. While there are different ways to interpret some of the data, and some unknown or hidden explanations, it provides a base for starting from what we do know and acting on the basis of that information. Rather than provide specific recommendations, the conclusion will highlight significant issues that have arisen and raise them as discussion points.

First, considering the audience-make up, it is suggested that the PFF has a small, yet diverse audience. On balance, it appears to have a range of constituent audiences. However, compared to other international fringe festivals, like Edinburgh, it does attract a high percentage of ‘Visitors Abroad’ (45% as opposed to 15% for Edinburgh). While clearly this is an important audience to attract, and is good for boosting Prague tourism, the PFF does not wish to be viewed as an ‘imported’ festival only for English language tourists (the largest groups being the Americans and the British). Part of this grouping (10% of the total audience) is a small loyal band of followers who come especially to see the festival, many coming back on average every 2 years. This grouping is unlikely to

grow much from year to year, but could be rewarded through advance publicity of the PFF programme and the sale of multiple discount tickets as they tend to see the largest number of shows (i.e. a loyalty card). Similarly the festival will continue to draw a 'Visitors Abroad audience associated with the festival' (12% of the festival audience), which will grow only at the rate the festival itself grows, as it is made up of performers and volunteer workers.

The final component of 'Visitors Abroad' audience are people on holiday in Prague who have not come to the city especially for the festival (23% of the audience), but have stumbled across the fringe during their stay. Based on figures which suggest that Prague attracts some 5m tourists a year (75% of the country total), during the 8 day festival the potential audience here would be approximately 110,000 tourists, so the festival is attracting one person for every 447 available tourists. As such it could do better at attracting this audience. Two main suggestions were boosting the profile of the PFF throughout the city more (including increasing advertising, fringe banners/ colour scheme and bringing back the parade), while a second major suggestion would be to market the festival through investing in the main tourist information system.

The festival also has a relatively strong audience of 'Non-Czechs living in Prague' - the so called expat communities as the largest of the two are Americans and the British, although there are 17 other nationalities represented here. This is a relatively strong (32% of the audience) and loyal audience, many of whom have attended the festival before and often see multiple shows, thereby getting the whole idea of fringe. Based on figures that foreign nationals make up approximately 6% of the population of Prague (1.2m), this gives a ratio of attracting one out of every 211 people. Compared to the ratio for 'Visitors Abroad', this ratio is favorable, yet still more could be done. Again, the suggestion of more advertising, targeted specifically at the expat communities could be made. Because this group tends to be predominately in professional and creative occupations (70% overall), a greater targeting of professional organizations and businesses and other arts/creative venues might help boost this section of the audience even more.

Finally, figures show that the 'Czech' audience (almost exclusively from Prague) makes up 23% of the PFF audience. When this is compared to the percentage of locals attending say the Edinburgh fringe (where the figure is 33%), it does not look seriously out of line. However, when we see that Edinburgh also attracts 58% of its audience from Scotland, the figure of 23% looks far worse. Indeed, if we calculate a similar ratio to those above based on a population of 1.1m Czechs in the city of Prague we see the PFF is only attracting approximately 1 out of every 4471 Czechs in the city, the worst for all sub-groups. Not only is this the single biggest potential audience for the fringe, but based on the fringe philosophy of encouraging diversity and engaging the local population, it is a crucial audience to recruit.

While part of the problem may lie in language issues (only 23% of fringe shows are in Czech, although over 50% are largely non-verbal and therefore could be seen as accessible to a Czech audience), the survey also reveals some other possible obstacles and barriers. One is the price of tickets. While 150 CZK (£4) may seem eminently

reasonable when compared to other festivals and fringes and reasonable for traveling Western tourists, taking into account the Czech wage,¹⁰ it may be viewed by Czech's as too high (evidenced by a lack of Technical occupations or unemployed in the Czech audience). This point is reinforced by the fact that the Czech audience had the lowest percentage of people buying 6 or more fringe tickets. And despite being an eager and potentially large audience, this may also be true for Czech students, with a significant number raising the issue of having a student discount. Surprisingly, the Czech audience has the highest percentage of retired people and housewives (at 8% and 4% of the audience), than any other group. However, discounts for Czech students, children, unemployed and retirees may help boost different segments of this audience.

A second barrier may be that the fringe is a relatively new concept in Prague and Eastern Europe generally. Additionally, older age groups (with limited English) and Prague men in particular may be resistant to the idea of fringe theatre as something new and challenging. Two of the major demographic findings concerning the Czech audience were that they were predominately young and female. This suggests that it is young female Czechs who are most willing to experience fringe theatre, while older males appear to be the most reluctant.

Overall though, demographically, the PFF audience is incredibly diverse. When the Czech gender imbalance is taken out of the equation, the figures reverts to around a 50/50 female/ male split and age-wise a wide range of age-groups are represented, with two exceptions. For instance, attendance at fringe appears to tail off for older age groups, and because there are few shows for children, the under 15 age category is also somewhat under-represented. Both groups might be catered for though discounts for seniors and children (and more shows directed at the child market along with the discount). While there is an occupational bias towards professionals and creative occupations (not surprisingly), the festival also attracts its fair share of students and small pockets of a range of other occupations (including retired). Perhaps the most amazing statistic displaying diversity and internationalism is the fact that 26 nationalities were represented in the audience.

Finally, despite its size, the PFF is incredibly successful in creating a positive experience for its audience. Over a quarter are regular fringe-goers (averaging 3 fringes out of 6), with over 90% satisfaction levels and 86% saying they would return to the fringe. Comments about the PFF were incredibly positive and most of the suggestions made were constructive comments rather than criticisms. Particularly noteworthy were the quality and standard of performances and comments on the incredible level of organization. Overall, the main suggestions revolved around making the profile of the fringe higher in the city, making minor improvements to the programme, and consider offering discount tickets for various groupings (particularly students, but also children, unemployed and seniors).

Overall the PFF has made tremendous strides over the last 6 years in terms of organization, profile and growth. Additionally it has also made a real economic impact on

the city of Prague by bring in new money to the tune of 3.9m CZK. This is in addition to the incalculable impact it makes in terms of its social and cultural impact.

This report has highlighted the PFF's various audiences and made suggestions as to how they can continue to grow. Yet, run a shoe-string budget, with no full-time staff, in order to continue and grow more investment is needed. While more council funding would be an excellent investment for the city (and value for money), the PFF also desperately needs some base funding through fund raising or private sponsorship (now common amongst most fringe festivals). There is great potential here for the PFF to develop into a major international festival rivaling successful fringes around the world. While this report is an initial step in creating a strategy for further growth by understanding its potential audiences, much more remains to be done in terms of funding and sponsorship as well as raising the future profile of the PFF.

Notes

1. A breakdown of the 2007 festival programme shows that it involved companies from 12 different countries utilizing 6 different languages. The vast majority of shows are in English however, with around 23% in Czech. Due to the non-verbal nature of many of the performances, it is estimated that around 55% of what is delivered could be experienced and enjoyed by non-English speakers.
2. This percentage is derived at by calculating 226 questionnaires completed from a total audience figure of 1068 (arrived at by dividing the number of tickets sold 4806 by an average of 4.5 tickets per audience member). This 21% sample compares very favourably with a 0.33 % sample of festival-goers at Edinburgh (4129 interviews with an approximate audience of 1,232,601 for all festival activities including the fringe - see SQW Limited and TNS Travel and Tourism, 2005), and in comparison is highly representative.
3. While the term 'ex-pat' is often used to refer to particular communities residing in Prague (usually UK and US, two of the largest and longstanding groups) , we prefer the term 'Non-Czech Living in Prague' to indicate that this group is broader than two counties mentioned above. For example, while Americans and British form the largest component of this group in the survey (77%), 17 other separate nationalities help make it up.
4. For instance, tourism in the CCR today is the second most lucrative industry in the country, contributing 11% to the country's GDP, and accounting for more than 10 percent of total employment in the country. Prague, the capital, accounts for 75% of all total foreign tourists in the CR. Based on projections, it is estimated that with the number of tourists set to grow to 7.5 million (from 6m in 2003), nearly 5 million tourist visit Prague a year (see Hollands, 2005).

5. We prefer here to refer to this group as ‘Visitors Abroad’ rather than ‘tourists’. For instance, it is important to note here that due to the nature and philosophy of fringe, the audience also traditionally includes other performers and volunteer workers associated with the fringe, who mutually supporting one another by attending each others shows, hence we sometimes divide the ‘Visitors Abroad’ into ‘audience only’ from ‘audience associated with the fringe’. Although this group may be performing or volunteering in Prague, they are also contributing new money into the economy when it comes to measuring economic impact.
6. As there is overall between nationalities in each category here – the total number of nationalities is 26, not the total of all categories.
7. While this may not represent exactly how many shows they actually did see (and how many tickets they bought), we had to ask the question in this way as questionnaires were handed out from the opening to closing day of the festival. We take this as a rough approximation of how many shows people did actually see.
8. Because PFF volunteers are unpaid their accommodation in Prague is provided free of charge, and they are given the opportunity to see shows on a rota basis if they wish (and if shows are not sold out).
9. Extrapolating from the sample percentages means that it is possible to confidently estimate total numbers for all sub-samples of the audience. For instance, it is calculated that in the Visitors Abroad category, 104 audience members came especially for the festival, 132 came associated with the festival and 246 came to shows but didn’t come especially for the PFF. The overall audience was also made up of 340 non-Czech’s living in Prague, and 246 Czechs, making up a total of 1068.
10. The average monthly wage in Prague in 2007 was 23,137 CZK (or £625), while outside of Prague it was only 16,545 CZK (source: <http://magistrat.prahamesto.cz>).

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