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WELCOME

FRINGE WORLD acknowledges the Whadjuk people of the Noongar Nation as the traditional custodians of the land on which we Fringe and pay our respects to elders past, present and emerging.

FRINGE WORLD has reported its impact across artistic participation, cultural, social and economic terrains annually since the first full Festival in 2012.

The primary sources of evidence supporting findings are ticketing data, and surveys completed by more than 6,400 individuals across audience, participants, local businesses and stakeholder groups.

There are some new sections to the report this year including detailed unpacking of financial operations, an outline of support given to Fringe artists affected by the financial collapse of an independent event company and a new Q&A section with Festival Director, Amber Hasler and CEO, Marcus Canning.

As always, illuminating quotes from participating artists, audiences, local businesses, media commentators, politicians and Fringe Directors from around the world are scattered through the report.

Consistant with general WA economic conditions, 2018 was a tough year for sales and the average capacity sold across shows dropped by 6%. Despite this the Festival still delivered more than \$8.6 million in payments to artists in 2018.

Other highlights included the biggest day of sales ever, with more tickets sold in a 24 hr period than across the entire 2011 pilot season. A renewed focus on free programming also led to total Festival attendance growing to more than 900,000.

This assisted FRINGE WORLD's economic impact surpassing the \$101 million milestone. For every \$1 invested by the WA state government in Fringe, \$81.31 was returned to the local economy.

Another transformative impact worth noting is that over the seven years of impact reportage, perceptions of increased safety in Northbridge and Perth CBD during Fringe have increased by almost 20%, consistant with positive increases in local business satisfaction over the period.

The majority of artists reported that they achieved their goals in 2018 and 86% recommend FRINGE WORLD to other artists. However, there has been a gradual decline in some artist satisfaction reported over recent years.

This is a priority area of focus for the Festival moving forward.

Although the majority of participants report that making money from their Fringe season is not their primary goal, it is worth noting that over \$37 million has been paid to participating artists and arts companies since 2012. This is cultural sector revenue and money for artists that did not exist in WA before the rapid rise of FRINGE WORLD.

Some fantastic new partners joined the Fringe family for 2018 and a number of new initiatives were made possible through the extended support of founding and renewing partners such as Lotterywest, Woodside and Gage Roads including FringeFeed.com.au and FringeFund.org that will have ongoing positive impact for Fringe artists.

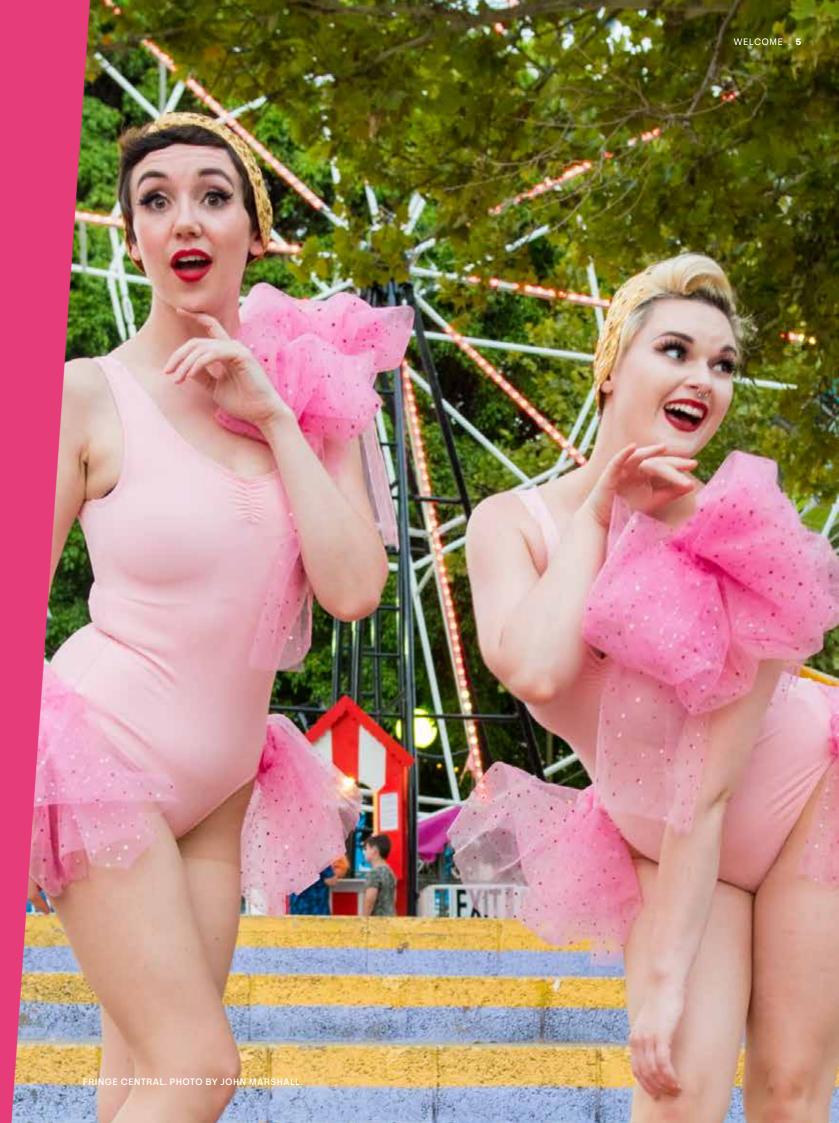
As the following pages attest, indicators remain positive for ongoing growth, with the Fringe continuing to attract new audiences, alongside the loyal, across all demographics and all postcodes.

Across cultural, social, visitation and civic impact outcomes FRINGE WORLD maintained high percentile rankings across all surveyed areas. It's a Festival that is passionately loved by its audiences and they take great pride in how the Fringe makes Perth better.

44

"The 2018 FRINGE WORLD Festival matched last year's \$10 million in box office sales, levelling out after years of successive growth. While FRINGE WORLD more than doubled the revenue of Perth Festival, the two leading arts bodies operate contrasting business models. Perth Festival covers the costs of artists in advance, while FRINGE WORLD acts as a platform for emerging and established artists to take their own risks and reap the rewards, or losses."

- Tori Wilson, Perth festivals stage run at box office, WA Business News, 14 March 2018.



2018 AT A GLANCE . **7**

2018 AT A GLANCE

EVENTS

VENUES

INDIVIDUAL PERFORMANCES

ARTISTS

ORIGINS







21% INTERSTATE



INTERNATIONAL

CIRCUS

18%

CABARET

MUSIC +

3% STREET /

39% COMEDY

14%

THEATRE

6%

CHILDREN'S

3%

2%

1%

FILM +

MULTIMEDIA

DANCE + P. THEATRE

VISUAL **ARTS**

\$37 MILLION

PAID OUT TO ARTISTS SINCE 2012

\$15,293,315

INTRASTATE, INTERSTATE & OVERSEAS **VISITOR EXPENDITURE IN 2018**

\$101,635,712 ECONOMIC IMPACT

PREMIERE EVENTS

144 WA PREMIERS 84 AUS PREMIERS

285 WORLD PREMIERS

SATISFIED WITH THEIR

OF ARTISTS WOULD RECOMMEND PERTH AS A

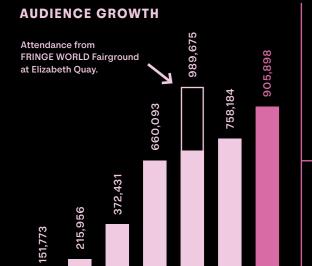
905,898

+ TICKETED EVENTS

368,498

ATTENDANCE AT **TICKETED EVENTS**

ATTENDANCE AT FREE



2012 2013 2014 2015 2016 2017 2018

\$10,112,845 **SPENT AT THE BOX OFFICE**



29,239 ESTIMATED VISITOR **BED NIGHTS**



AVERAGE BUMS

ON SEATS





\$29.09

AVERAGE **TICKET PRICE** 99.400+ **EMAIL SUBSCRIBERS**

18,700+ **FACEBOOK FANS**

\$9,935,846 WORTH OF MEDIA COVERAGE REACHING AN AUDIENCE OF 52,206,157





WHAT IS FRINGE WORLD?

44

"FRINGE WORLD has become a highlight of the summer calendar for hundreds of thousands of Western Australians."

- HON Mark McGOWAN MLA, Premier of Western Australia, 26 January 2018.

FRINGE WORLD is a month-long Festival held in Perth, Western Australia during the city's buzzing summer festival period. Loved by hundreds of thousands of people, it's proudly recognised as the third largest Fringe in the world in terms of ticketed attendance and the largest annual event in WA.

The Festival offers a smorgasbord of choice for punters with the variety of different styles on offer and due to the wide variety of shows vying for audience, ticket prices tend to be competitive. This allows audiences to experience lots of different shows and try out things they might not normally see.

Fringe is all about big variety and offering something for everyone including comedy, circus, theatre, visual arts, music and musicals, film, dance, cabaret and everything outside and inbetween. Shows are presented by WA artists alongside performers from all over the world. It's where you can see emerging local artists showing for the first time right next door to international superstars of the Fringe circuit.

FRINGE WORLD is known for its transformations of public spaces with lots of 'pop-up' venues and hubs alongside performances staged in regular arts venues as well as non-traditional arts venues throughout the city and surrounds including pubs, clubs, restaurants, bars, shops and cafes.

It's a very relaxed and welcoming festival. Audience members are not expected to 'frock up' to attend and this friendly atmosphere has a history of attracting a wide diversity of punters, many of whom don't usually engage with the arts.

FRINGE WORLD is open-access which means anyone can participate and have a go. Participants pay a registration fee, find a spot in a venue and they're in. It's up to individuals, companies and venues to choose to take part. FRINGE WORLD does not curate the program, buy any shows or employ artists directly.

The Fringe is a large marketplace where shows are in competition with each other for audiences. In the artistic community, Fringes are seen as a place where artists develop not only their work but also their industry skills and get to test new works before further development and touring.

FRINGE WORLD operates a bit differently from the traditional Edinburgh Fringe model where the festival provides a marketing and ticketing umbrella and isn't involved in any venues or programs directly.

In contrast, FRINGE WORLD provides the same umbrella services, but also has skin in the game, with about half of the shows in the Festival presented at venues in FRINGE WORLD hubs such as The Pleasure Garden, pop-ups in Perth Cultural Centre and in 2018, The Ice Cream Factory.

This is one of the key reasons why the Festival has been able to expand so fast and hopefully in the right directions, essentially fuelling its own growth through sales rather than primarily relying on government and corporate support.

The other half of the Festival occurs through independent programs in venues right across the metropolitan area. FRINGE WORLD does not have any direct control or management of any of these programs but seeks to provide relevant and useful information and support to artists, venues and independent program producers to help them increase their chances of success.

In addition to a large umbrella marketing campaign and extensive box office and ticketing services, FRINGE WORLD provides a wide range of additional benefits for participants including discounts with local participating businesses, access to the Fringe Artist Club, free entry to other Fringe shows and touring support alongside industry and professional development opportunities both during the Fringe and throughout the year.

our PURPOSE

is to enrich and evolve the culture of Western Australia.

our VISION

is to embed FRINGE WORLD in the hearts and minds of all Western Australians.

our MISSION

is to provide enduring benefits for artists, audiences and a diverse family of stakeholders through building the world's strongest Fringe festival.

our CORE VALUES

We surprise and delight.

We mainstream Fringe culture.

Our success is defined by the success of our artists.

We make Perth better.

THE WORLD OF FRINGE. 11 10 . FRINGE WORLD FESTIVAL . 2018 IMPACT REPORT

THE WORLD OF FRINGE

According to World Festival Network statistics, each year over 220 Fringe Festivals across the globe showcase hundreds of thousands of artists and performers to over 19 million people in over 60,000 free and ticketed events.

Over 8 million Fringe tickets are sold in over 6 thousand venues across the globe.

The World of Fringe is an extraordinary network of creativity and industry that is both universal and particular to the places and cultures within which fringe festivals occur. Regardless of the vast differences in scale and context, they all share common DNA.

Their collective history stems back to 1947 in Scotland when eight local theatre companies mounted an alternative program on the edges of the first Edinburgh International Arts Festival. Today Edinburgh Festival Fringe is the largest arts festival and marketplace in the world and its open-access spirit has spawned a huge network of Fringe Festivals built on a similar 'give anyone a go' democracy.

A number of industry networks are in place to support Fringe Festivals around the world including the Canadian Association of Fringe Festivals (CAFF), the World Festival Network and the World Fringe Alliance, a select group of nine of the best Fringe Festivals, with FRINGE WORLD, Perth a proud founding member.

Through the World Fringe Alliance and through connection to other Australian Fringe Festivals such as Adelaide Fringe, Sydney Fringe and Melbourne Fringe, FRINGE WORLD is able to connect Western Australian artists with international and national touring opportunities and continue to work in partnership with Fringe Festival networks to continually improve and develop the Fringe industry across Australia and the world.

IN ORDER OF TICKETED ATTENDANCE

THE BIG 4 FRINGES!

EDINBURGH FRINGE

Established 1947

2.7 Million Tickets Sold

3,398 Events 515 Venues

53,232 Performances

(2017)



ADELAIDE FRINGE

Established 1960

708,500 Tickets Sold

1.223 Events

442 Venues **6,000** Artists

(2018)



FRINGE WORLD FESTIVAL

Established 2011

368,498 Ticketed

730 Events

155 Venues **3.450** Artists

905.898 Attendees



Established 2001

249,483 Tickets Sold

1.008 Events

168 Venues **555,518** Attendees

(2017)



MELBOURNE FRINGE

Established 1982

65,689+ Tickets Sold

400+ Events

179+ Venues **3.000+** Artists

(2017)

330,000+ Attendees



GRAHAMSTOWN FRINGE Established 1974

350 Events 50 Venues

227.524 Attendees (2016)



50 Venues 1.554 Performances

(2016)

HOLLYWOOD FRINGE

Established 2008

PRAGUE FRINGE

Established 2002

50 Events

8 Venues 236 Performances

(2017)

AMSTERDAM FRINGE

(2017)



"...one of the most challenging market

places in the world to produce or

- Richard Jordan, Can you still make it at the Edinburgh

perform at, but... brimming with discovery, ideas and optimism."

Festival Fringe?, THE STAGE, UK, 16 August 2016.

Established 2005

44 Events 40+ Venues



AUDIENCE PROFILE

There is no other event or festival in Western Australia that compares with FRINGE WORLD's audience and market reach in terms of diversity, breadth, depth and scale.

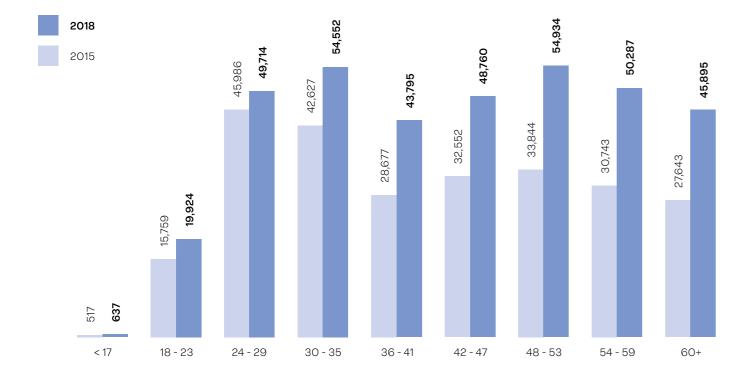
The 2018 results indicate that the Festival's broad audience reach and growth shows no signs of abating.

During the 31 Day Festival, audiences of all ages and demographics binge on the fabulous array of entertainment offerings.

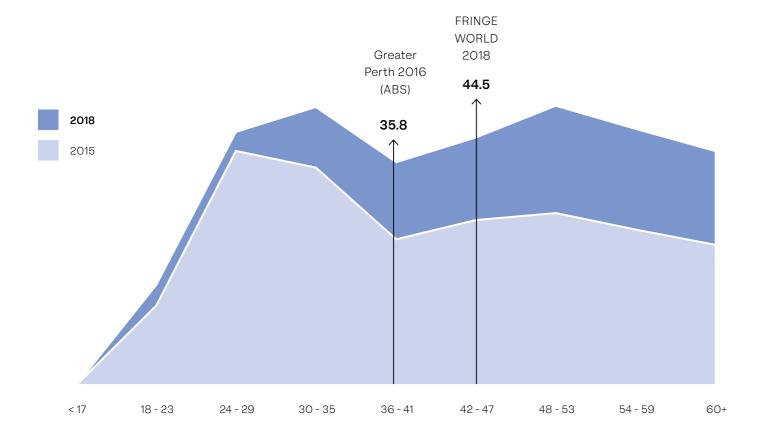
The young family and pram-pusher market was an area of particular growth in 2018 alongside ongoing success in attracting audiences in all 50+ brackets. The Festival looks forward to further stimulating and satisfying all these friendly and growing markets.

FRINGE WORLD TICKETED ATTENDANCE BY AGE

Whereas many other cultural offerings tend to primarily reach one or two age demographics, FRINGE WORLD has strong penetration across all age groups with significant annual growth in age brackets >40.

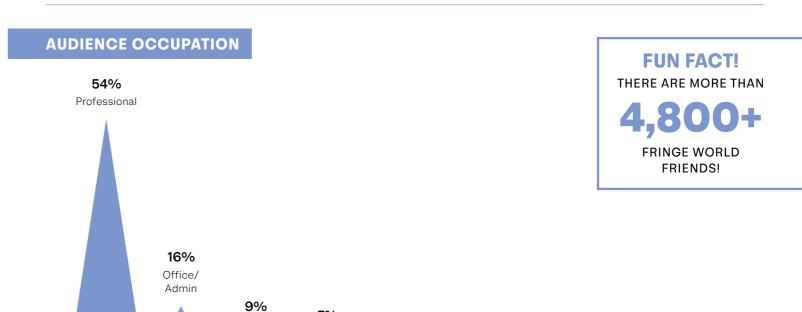


MEDIAN AGE COMPARISON



"It's growing and there's something wonderful about the Perth crowds - it sounds like I'm blowing smoke up people's arse but there's this thing, they are more willing to take a punt on something. They just take a punt. It's excellent. That's what makes the Fringe festival really work - sort of strange, unexpected acts can come because they will survive and it makes this really wonderful diverse smorgasbord of shows" - Claire Hooper

- Krystal Sanders, Claire's confessions, The West Australian, 14 February 2018



5%

Student

3%

Home

Duties

2%

Unspecified Unemployed

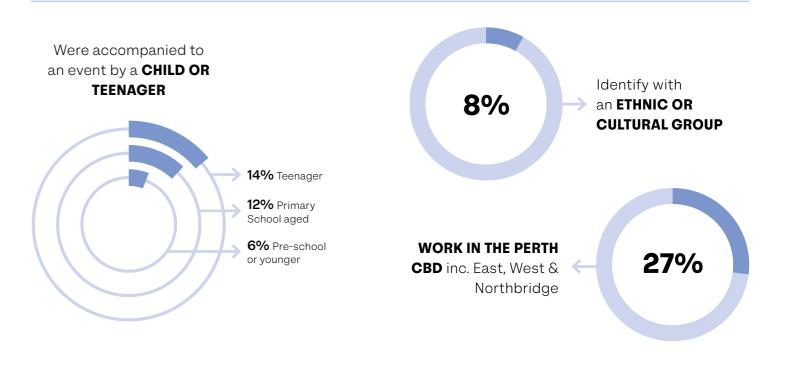
3%

Technical

7%

Retired

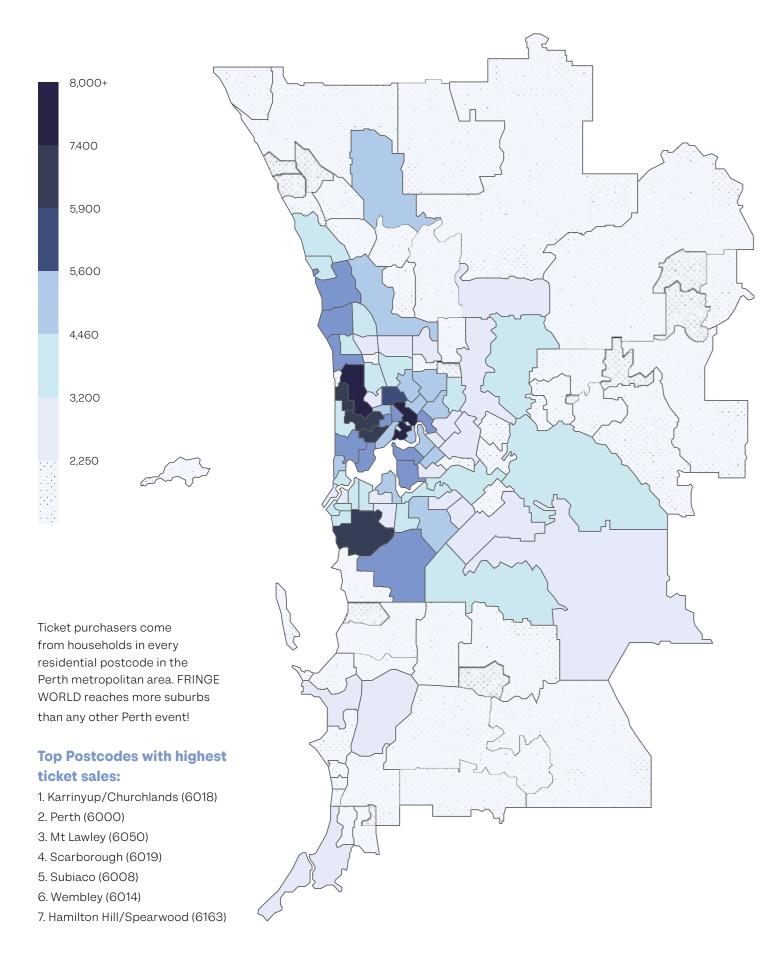
Other



AUDIENCE PROFILE . 17

PERTH METROPOLITAN AUDIENCE DISTRIBUTION

Number of tickets sold by postcode

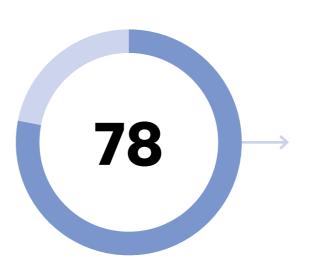


FRINGE PROMOTES PERTH TO THE WORLD!

Visitation from interstate and overseas



NET PROMOTER SCORE



Net Promoter Score (NPS) is a performance metric used to rate a company's customer service and how likely a customer would be to recommend a company to people they know. As a comparison, recent Roy Morgan and NPS Benchmarks reportage about a well known bank indicated a NPS of 12.1, a nationwide telco as 17 and Tesla as 97.

44

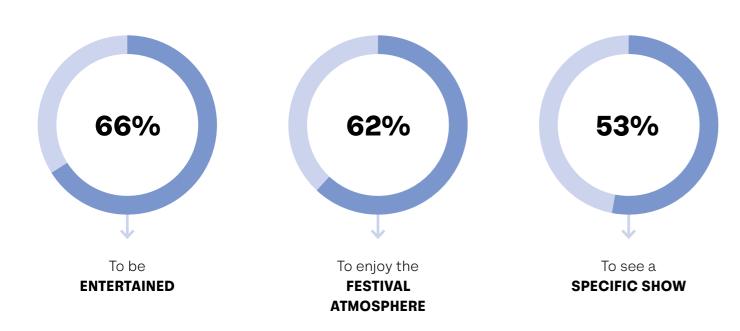
"The atmosphere is like party time, a carnival, it's lovely, there's so much merry making," Lee Stevens said. "You meet such interesting people. It just brings Perth alive. It's just wonderful."

- Annelies Gartner, *It's party time for Fringe-binge twins*, **The West Australian**, 29 December 2017

72%

OF FRINGE WORLD FRIENDS INTEND ON RENEWING FOR THE 2019 FESTIVAL.

TOP 3 REASONS FOR ATTENDING AN EVENT



44

"There's a pretty strong argument to be made that this represents the very best time of the year for our city. With festival season in full swing, led by the semmingly unstoppable Fringe circus, it's also a glimpse of its potential. Perth is changing, and for the better. We should embrace it."

- Gareth Parker, Hot in the city - Northbridge, liquor reforms show how Perth can work, Sunday Times, 17 February 2018

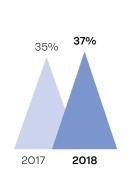
CULTURAL CONSUMPTION IS THE PRIME MOTIVATOR FOR AUDIENCE VISITATION AT THE FRINGE

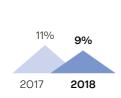
To expose themselves / others to arts and cultural **EXPERIENCES**

Just to enjoy a **DRINK/ MEAL**

What would you have done if you had not made this trip to FRINGE WORLD?

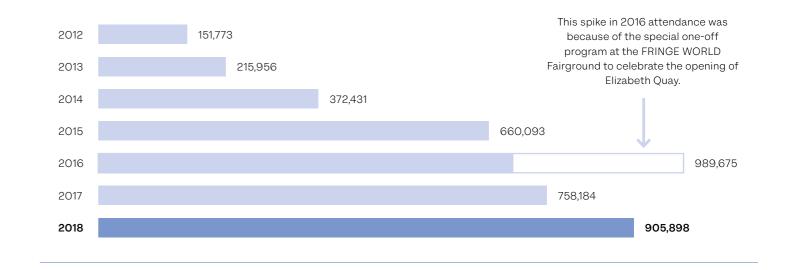
(STAYED HOME)



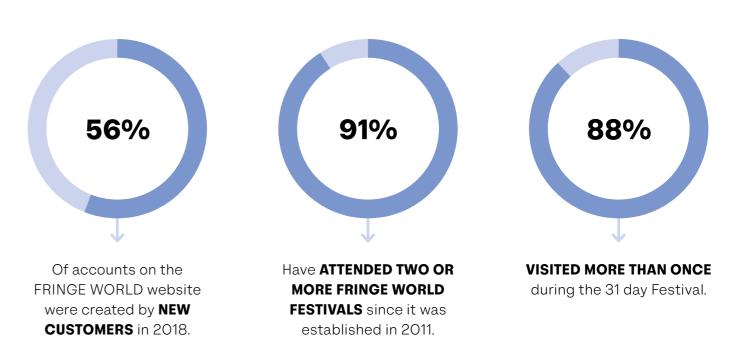




TOTAL ATTENDANCE AT FREE AND TICKETED EVENTS



POSITIVE WORD OF MOUTH DRIVES FRINGE WORLD GROWTH



Average number of tickets purchased per customer account







44

"From Freo Royale in Fremantle to the Sunset Veranda in Scarborough and Midland's new hub The Pickled Swan.

Fringe is spreading the celebration from Geraldton to Rockingham."

- Annelies Gartner, Are you ready to binge on FRINGE WORLD?, The West Australian, 23 January 2018

CULTURAL VISITATION

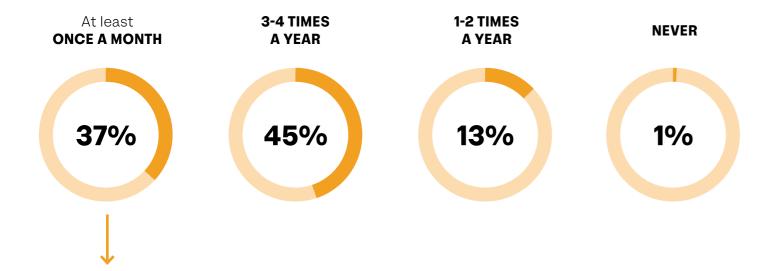
For many a WA Fringe-goer, the Festival is their primary form of annual cultural consumption.

It's precisely because Fringe offers a cheerful entertainment smorgasbord with something for everyone across a wide array of artforms that a mainstream audience is enticed and attracted to visit the Festival.

Our vision is to embed FRINGE WORLD in the hearts and minds of all Western Australians and over our first seven years we have attracted a mass and mainstream market in Perth that is loyal and continues to grow.

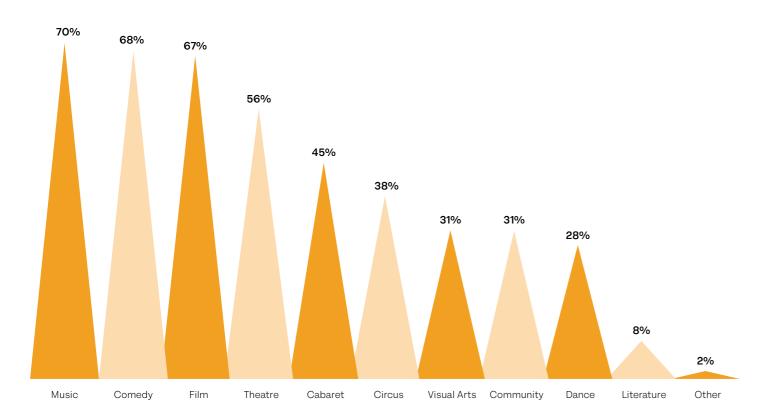
AVERAGE CULTURAL VISITATION

Over the past 12 months how often did you attend an arts or cultural event?

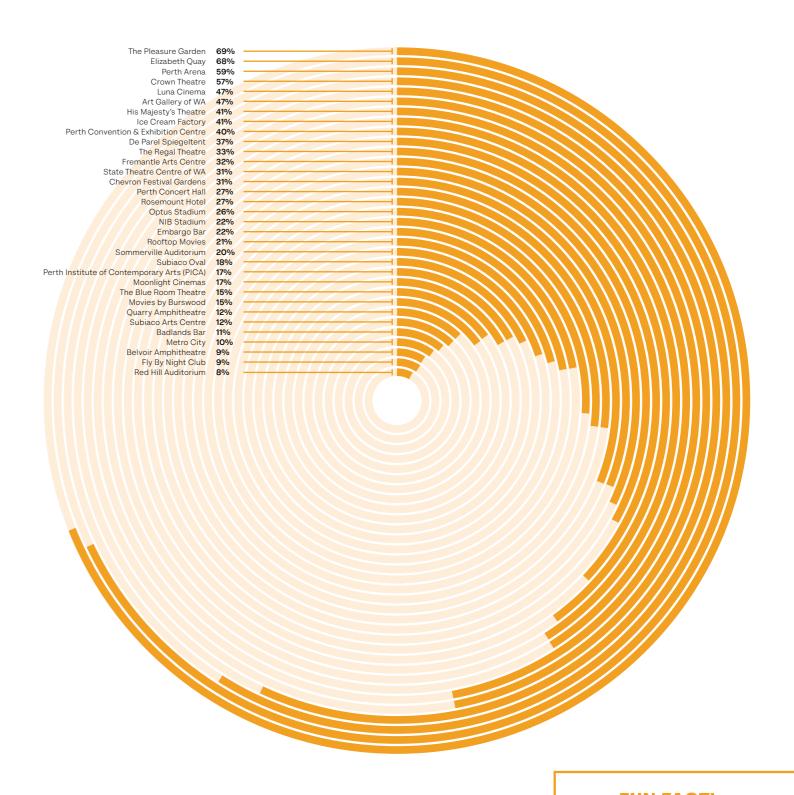


Only 37% of the 2018 surveyed audience would be considered high cultural consumers, attending cultural events at least once a month. This figure is consistent with the previous year, indicating that Fringe continues to attract a mainstream and non-traditional arts market. **THIS RESULT IS GOOD NEWS FOR PARTICIPATING VENUES** that are able to tap into this audience by presenting shows in the Fringe.

What kind of Arts and Cultural events did you attend in the last 12 months?



Which of the following performance venues have you been to in the last two years?



FUN FACT!

THE WEST AUSTRALIAN SPIEGELTENT WAS THE VENUE MOST PATRONED BY FRINGE WORLD FRIENDS



CULTURAL OUTCOMES

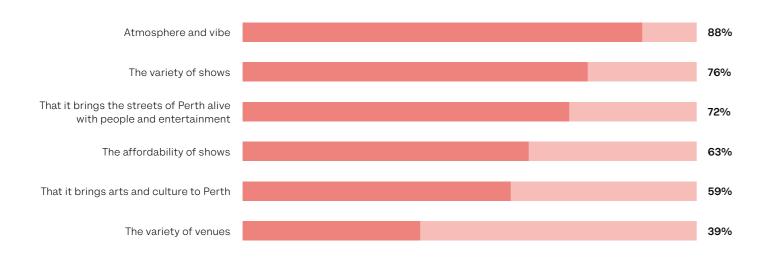
Much traditional live performance and culture can be a bit intimidating to many people and the high ticket cost can be out of reach to mainstream markets.

The great value offering at Fringe means that it is an approachable platform for mainstream audiences to give cultural content a go.

Audiences come away from their Fringe experience with a taste and appreciation for live performance, stimulating their willingness to experience more cultural activities throughout the year; with flow-on benefits for the WA cultural community and sector.

REASONS FOR ATTENDING

What are your favourite things about FRINGE WORLD?





INCREASE ACCESS TO ARTS EVENTS

Fringe is a great value entertainment option with a 2018 Festival average ticket price of \$29.09.

The free event offering at the Festival adds to pop-up hub environments such as The Pleasure Garden, with the 2018 Festival featuring more than 63 free events.

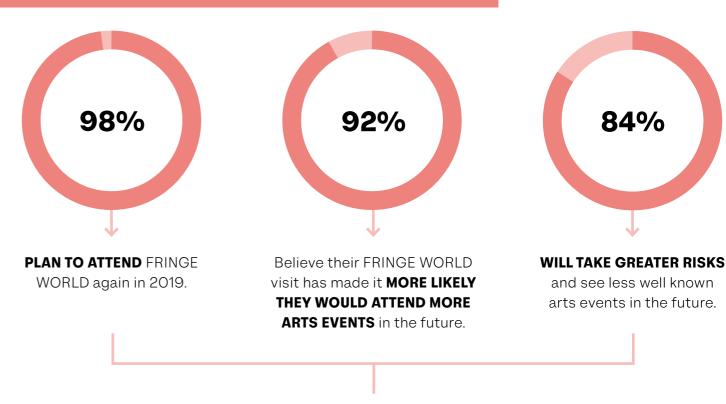
The buskers and street performance program was expanded in 2018 thanks to boosted support from the City of Perth that enabled the presentation of the City of Perth FRINGE WORLD Buskers Weekender. These events attract audiences to Northbridge and the Perth CBD adding to the festive vibe.

44

"FRINGE WORLD 2018 was as wondrous and magical as every Fringe before it, and no doubt every Fringe to come. It is the one time of the year when Perth belongs to the freaks, the weirdos, the talented and the hilarious, and our streets are liberally coated in hot pink invitations to indulge in a veritable multitude of art forms."

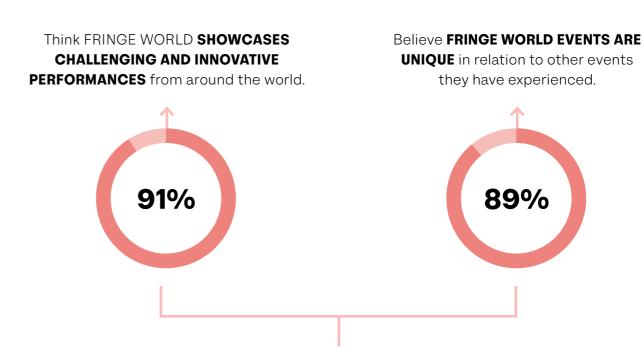
- Natalie Giles, *FRINGE WORLD 2018 And... that's a wrap*, **X-Press Magazine**, 1 March 2018

ENCOURAGE GREATER CULTURAL PARTICIPATION IN FUTURE



Fringe is increasing the likelihood that audiences will engage with arts at other times during the year.

DISTINCTIVENESS AND QUALITY



Fringe brings the streets alive with quality arts events presented by Western Australian performers alongside artists from around Australia and the world.



SOCIAL OUTCOMES

A Perth summer is not complete without a visit (or five) to the Fringe. It's been a game-changer in terms of city vibrancy and cultural activation.

FRINGE WORLD promotes Perth to the world, contributing significantly not only to 'brand Perth', but more broadly to 'brand WA'.

To have driven such positive cultural change in less than 10 years is testament to the impact of Fringe and its future potential to deliver ever more value in promoting WA to the world and continuing to stimulate positive social outcomes for the widest array of the population possible.

32 . FRINGE WORLD FESTIVAL . 2018 IMPACT REPORT SOCIAL OUTCOMES . 33

WHERE WE'VE BEEN IN 2018!

ACTIVATION OF PERTH CITY AND SURROUNDS

In 2018 FRINGE WORLD events were presented across 24 suburbs in the Perth metro area plus regional shows performed at Geraldton and Rottnest Island.

The heart of the Festival is Perth's night-time entertainment precinct, Northbridge, where FRINGE WORLD attracts throngs of crowds who fill the streets, pubs, clubs, bars, restaurants, theatres and venues alongside pop-up festival environments built in parks, public and privately owned spaces.

The Perth Cultural Centre and The Pleasure Garden are the popular Festival hubs that book-end the top and tail of Northbridge's central James Street spine and in 2018 FRINGE WORLD also programmed a new hub at The Ice Cream Factory on Roe St in partnership with its owners and managers.

The Showman's Fair at the Urban Orchard was another new offering in 2018. A Dutch mini-festival with live music, performances and special surprises including a highly performative long table dining experience.

A large number of new 'bricks-and-mortar' venues in Northbridge and Perth CBD hosted Fringe shows

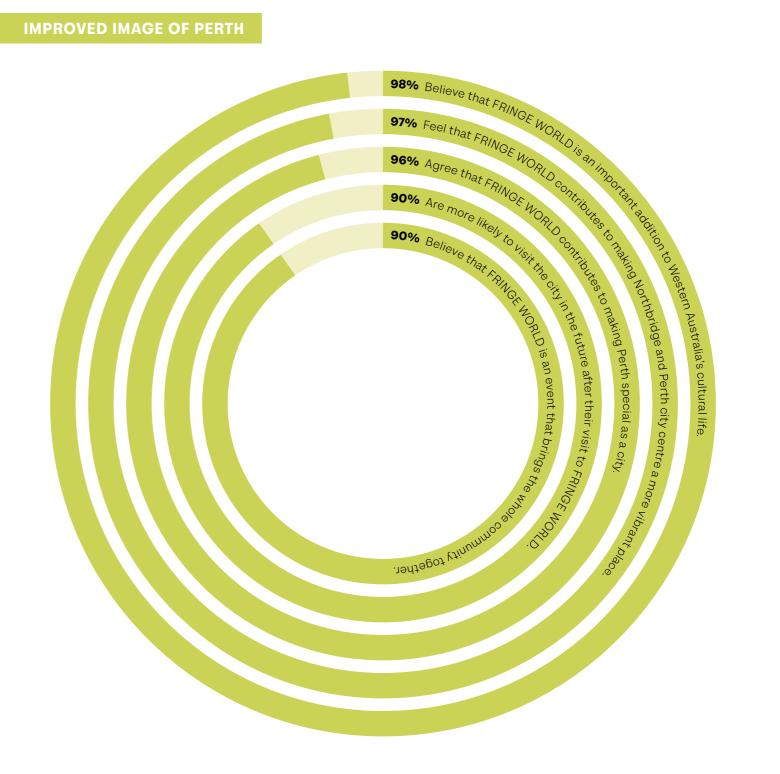
for the first time in 2018 including an array of venues that participated in the independent Palace

Society program (see page 46).

Other new and returning independent programs allowed Fringe audiences to see something close to home or extend their adventure and explore shows in venues all over the metro area.

From Freo Royale in Fremantle to the Sunset Veranda in Scarborough, from The Pickled Swan in Midland to Leedypalooza in Leederville, from Rockingham to Rottnest to Funtavia in Geraldton, the Festival offered something for everyone and something happening in a variety of neighbourhoods.

IMPROVED IMAGE OF PERTH



FRINGE ADDS VALUE TO THE PERTH BRAND

Of participating artists **RECOMMEND PERTH AS A** PLACE TO VISIT.

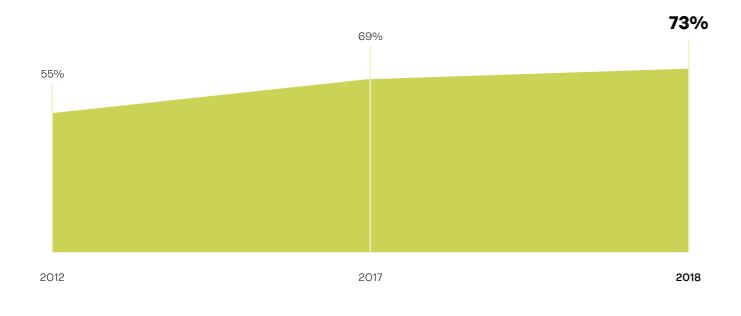
85%

Think FRINGE WORLD **INCREASES THEIR PRIDE IN PERTH** as a city.

Agree that FRINGE WORLD promotes Perth as A CITY THAT IS GLOBALLY CONNECTED.

PERCEPTIONS OF SAFETY

Audiences agree that FRINGE WORLD has contributed to them feeling safer in Northbridge and the Perth City centre.



FRINGE WORLD brings to Northbridge and Perth CBD people from all ages and backgrounds including baby boomers, families with young children and everything in between. The critical mass and diversity of audience visiting the area is one of the reasons why people feel safer when Fringe is on.

Fringe is the best time to visit Northbridge and Perth CBD, with visitors able to see and experience the area in its best possible light.

The positive experience that audiences have at Fringe has a flow-on benefit for retailers and businesses in the precinct, not only through the direct visitation and spend during the Festival but also through the increased awareness with an audience that would not traditionally patron the area leading to increased visitation at other times in the year.

44

"A hallmark of a sophisticated, liveable and global city, is engagement with the arts and cultural industries ... After more than a decade of population and income growth, the art and cultural activities in Perth are on a growth trajectory, contributing to the liveliness and vitality of the city ... The arts contribute to a sense of place and connectedness, making the city more attractive and a destination for new residents, tourists and business ... Perth's FRINGE WORLD Festival is another important cultural festival for the Greater Perth economy."

- Professor Matthew Tonts, Fiona McKenzie, Jessica Legendre, *PERTH as a resilient economy.* FACTBase Special Report.

Committee for Perth & The University of Western Australia.

November 2017.

HEARTS AND MINDS

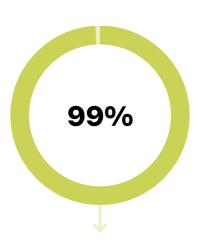
For a Festival that has just celebrated its seventh birthday, the positive public sentiment that it has achieved is large. The hundreds of thousands of audience members who have attended FRINGE WORLD since the pilot season in 2011 know the value of the Festival, which is well on its way towards embedding itself in the hearts and minds of all Western Australians.



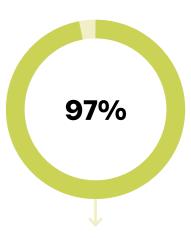
Agree that FRINGE WORLD

SHOULD CONTINUE TO

BE PRESENTED in the
forseeable future.



Think that FRINGE WORLD is **SOMETHING THEY WOULD LIKE TO DO ANUALLY.**



Agree that the STATE
GOVERNMENT SHOULD
SUPPORT THE FRINGE
so that it can continue
to benefit the Western
Australian community.

44

"As FRINGE WORLD and Perth Festival collide in February, there is no better place to be than right here - when the shortest month of the year has the longest, most fulfilling list of the arts experience you could find anywhere on the planet." - Nathan Bennett, Executive Director, Perth Festival

- Gareth Parker, *Hot in the city - Northbridge, liqour reforms show how Perth can work*, **Sunday Times**, 17 February 2018

6%

FRINGE WORLD ANNUAL REVENUE CONTRIBUTED BY STATE GOVT.

78%

Think FRINGE WORLD IS ONE OF THE TOP 5 BEST THINGS ABOUT PERTH.



44

"How do you measure success on the fringe? The idea of making money may be a longer term goal, ... if an individual's driving ambition is for a life in the theatre, she or he must play the long game. Crucial to all this is the management of expectation [and] you must deliver the best possible production and try to find an audience for it. Anything beyond that is a bonus, but never a given."

- Richard Jordan, *Can you still make it at the Edinburgh Festival Fringe?*, **THE STAGE**, UK, 16 August 2016.

PARTICIPATING ARTISTS ARTISTS

One of FRINGE WORLD's core values is, 'Our success is defined by the success of our artists'.

The Festival continues to see artists, companies, producers and presenters returning every year and the surveyed feedback from participating artists indicates that the majority of Fringe artists achieve their goals at FRINGE WORLD.

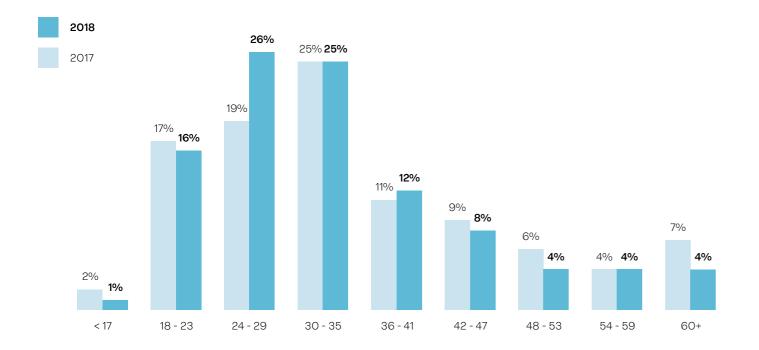
Read on for more details about the artist's experience at FRINGE WORLD and for information about how the Festival supports its artists.

44

"This will be our seventh FRINGE WORLD. It's a permanent fixture of our year. We get so many offers from around the world at this time of year but it's always a solid 'No' from us so we can come to Perth" Fez Faanana, Briefs Factory."

- Jessie Papainr, *Briefs' new journey out of this world*. **The West Australian**, 8 January 2018

ARTIST AGE RANGE

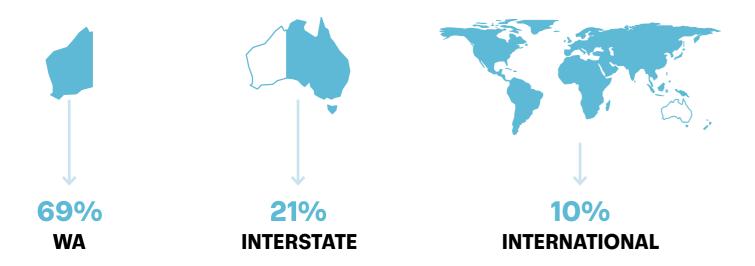


44

"FRINGE WORLD Festival is the most amazing month of the year in Perth, The whole city comes to life and is filled with a truly magically energy. It also gives local artists a chance to show off their work to people who normally wouldn't see it, I am grateful for FRINGE WORLD and the amazing opportunities it creates for me as a comedian!"

- Luke Bolland, Luke Bolland - Name Dropper, 2018 FRINGE WORLD Participant

ARTIST ORIGINS

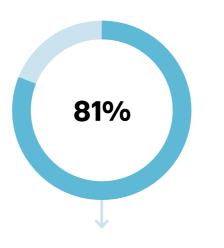


ARTIST FEEDBACK

44

"It is the number of people that apply that sets how large or small an open-access Fringe festival is. It is not for us to limit that demand, for if we do then it ceases to be open-access. ... So if there is a sufficient chorus of voices in either Adelaide or Perth about the size of audiences, then it will naturally slow the growth as demand settles. Consolidation years are always good things anyway I find. It can be very hubristic to always be striving to be bigger every year. We need to remember what we are here to do, and that is to provide good services and to support a sector that needs it more than ever."

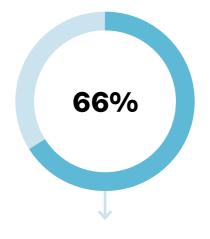
- Julian Caddy, Brighton Fringe Managing Director, Facebook, February 2018



Are **SATISFIED WITH THE FRINGE WORLD FESTIVAL**

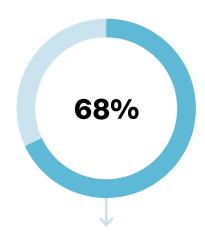
from the perspective of a participant.

5% drop from 2017.



Agree that FRINGE WORLD is A PLATFORM TO ACCESS AN AUDIENCE THEY WOULD OTHERWISE NOT HAVE ACCESS TO.

12% drop from 2017.



Agree that participating in FRINGE WORLD is IMPORTANT TO THE DEVELOPMENT OF THEIR CRAFT as an artist.

10% drop from 2017.

44

"For James Berlyn (creator of yourseven), presenting a show during a festival where audiences are willing to take a punt on offbeat shows is an advantage. "[Fringe] is a time when the length and breadth of contemporary performance is embraced" he said. "For local performance makers, it's really a time to explore and take risks and try things"

- Emma Wynna, Perth's Fringe Festival grows to third biggest in the world in just seven years, www.abc.net.au, 26 January 2018.

PARTICIPATING ARTISTS BENEFITS

\$8.6 MILLION

WAS DELIVERED TO ARTISTS & ARTS COMPANIES IN GROSS BOX OFFICE RETURNS AND FEES

ALONG WITH OTHER SERVICES SUCH AS

ARTIST PASSES

THE ARTIST CLUB

ADVICE & INFO

ACCESS TO A HUGE MARKET

AWARDS PROGRAM

REVIEWS

HOW FRINGE SUPPORTS ITS ARTISTS

FRINGE HELPS ARTISTS TO HELP THEMSELVES

The open-access Fringe platform is one that allows for incredible opportunities for artists and arts companies, but like any open-market there are also risks.

Within this model participants - like any small business, self-starter or entrepreneur - need to be responsible for budgeting appropriately, managing all aspects of their season and marketing their work; that is the nature of Fringe.

FRINGE WORLD provides extensive information to anyone thinking about participating so they know what to expect and can make considered decisions. The Artist Info Pack is the first thing that artists receive before registering with the Festival and it includes sales performance summaries across the spectrum of shows in the Fringe and key financial facts.

This information is provided so artists can set their expectations and sales projections at realistic levels, budget accordingly and make informed decisions about whether Fringe is the best platform for their work, what their goals are for their season and how they plan to reach them.

FRINGE HELPS ARTIST THROUGH A BOX OFFICE SPLIT

A box office split is the most common financial relationship between venues and shows and is a means for artists to cover overheads such as technical, production and front of house staff, and equipment costs without needing to pay upfront. It also means the venue is sharing the risk with the artist so is motivated to help market and support the show.

FRINGE WORLD hub venues take 32% of the box office which is modelled at the lowest rate possible for viability. Independent venues and programs set their own box office split deals with artists. Some venues use a flat hire rate. Other venues don't charge anything and don't take a cut of box office as they make money from bar and food sales and also like the Fringe exposure and feel good about supporting Fringe artists.

FRINGE DELIVERS A BIG MARKETING CAMPAIGN

Whilst it is the artist who promotes and markets their show, FRINGE WORLD markets the Festival overall, including delivering an extensive advertising campaign, website and sales platform, producing key print materials such as the Festival guide and delivering social, digital, outdoor and media campaigns. Much of the marketing strategy is about driving audiences to the website, which is where the entire program is available and most tickets are sold.

FRINGE PROVIDES AVR AND SALES SERVICES

The main interface between artists and the Fringe is through the online Artist Venue Registration System (AVR). This is a sophisticated tool developed by Adelaide Fringe and used by FRINGE WORLD. It's where participants send and receive all relevant information about their show. It integrates with all marketing and sales channels including the ticketing system, allowing for artists to receive up to date sales reportage for their season, take part in daily sales programs in real-time such as rushtix and for settlements to be processed in a fast and efficient way.

FRINGE HELP IS ALWAYS AT HAND

The programming team are dedicated to helping participants have the best Festival experience possible and artists have a direct line to the right Fringe producer in the lead up to, during and post their Fringe season.

FRINGE GIVES FOOD AND BEVERAGE DISCOUNTS PLUS UNLIMITED FREE SHOWS

The Artist Pass gives all artists free entry to FRINGE WORLD ticketed events, (a benefit we believe is unique to FRINGE WORLD), food and beverage discounts at key local businesses plus entry into The Budgie Smuggler: FRINGE WORLD Artist Club where food and beverage prices are heavily subsidised by Fringe and key partners.

FRINGE SUPPORT REVIEWS

The Fringe marketing and PR teams aim to get as many shows reviewed as possible, but the media landscape in WA is shallow so opportunities are thin. This has led to the development of the online FringeFeed.com.au platform which sees a large team of independent voluntary reviewers covering as much of the Festival as possible.

FRINGE ARTISTS CAN WIN BIG

FRINGE WORLD events can go in the running to win an Award, both in their genre as well as an array of special prize categories. The total prize pool of the FRINGE WORLD Awards is the largest of any Fringe in the world and includes the Martin Sims Award for best new WA work. Over one hundred participating judges ensure that all eligible shows are seen by an array of judges over the course of their season.

ATTENDANCE AT EVENTS WITH A PASS

18,353

FREE ATTENDANCES AT TICKETED EVENTS WITH A PASS

1

BASED ON THE AVERAGE TICKET PRICE
THIS EQUATES TO

\$533,889

BENEFITS TO PASS HOLDERS THROUGH FREE ATTENDANCE WHICH IS AN AVERAGE OF

5.3

TICKETS

\$163

44

"All in all I really enjoyed FRINGE WORLD. It seemed a little more tricky this year to sell tickets and try and compete. I also noticed the media landscape has changed dramatically this year. It was much harder to get stories, and if you did get through to media they wanted you to pay for them. This was a huge first. There were; however, more options to get reviews through Fringe Feed though, which was great"

- Monique Boucher, 80s LoveBUS Touring Staring Gloria, 2018 FRINGE WORLD Participant

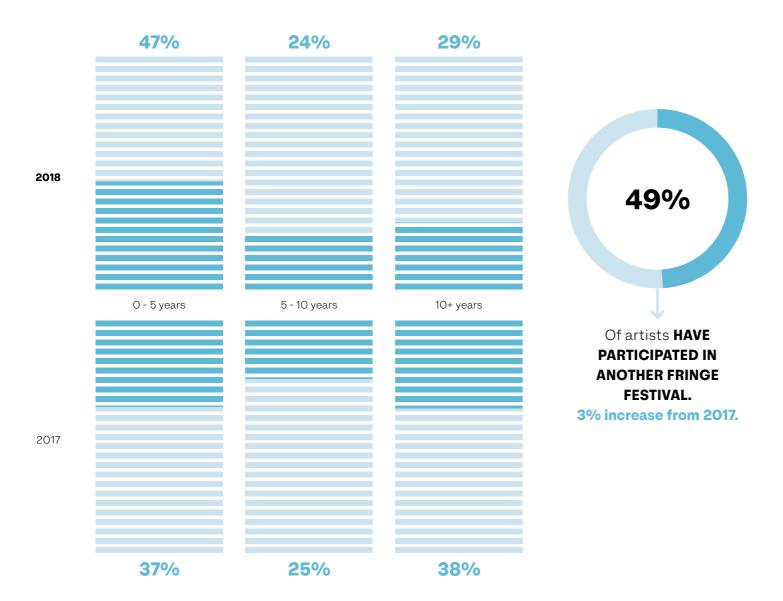
WHAT MORE CAN FRINGE DO TO SUPPORT IT'S ARTISTS?

FRINGE TAKES ON BOARD FEEDBACK

The Festival annually surveys participating artists and venues. Some of the results are shared in the Impact Report, others feature in Artist Info Packs, Artist Toolbox posts over the season and are utilised by the Festival to inform planning and continuously improve the offering for artists. A key theme in feedback annually is about participation affordability and Fringe strives to make the Festival as affordable for artists as possible. Current registration, ticketing fees and box office splits are set at levels that are as low as possible, whilst maintaining Fringe viability. With increased government support, new and extended corporate sponsorship and the potential to grow philanthropic support it is a strategic aim of the Festival to bring costs of participation down whilst extending and improving services. This includes the potential for a broader marketing campaign to further increase visitation to all shows across the Fringe. Ultimately it is up to each and every participant to decide whether they wish to take part in Fringe, what they are seeking to get out of it and how they plan to meet their objectives. It is up to FRINGE WORLD to continue to grow the audiences that attend the Festival and support participating artists, arts companies, venues and independent programs in useful and meaningful ways that increase their chance of success.

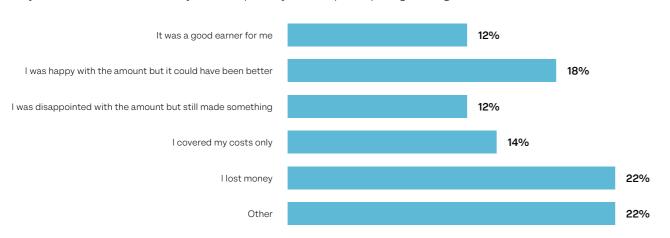
ARTISTS PERFORMANCE EXPERIENCE

How many years have you been performing/participating as an artist or presenter?



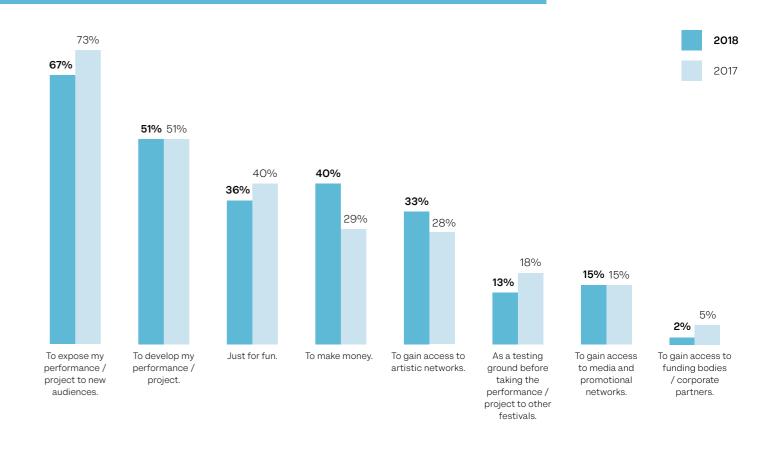
Which of the following best describes the personal financial benefit that you received?

Only 40% listed "To make money" as their primary aims of participating in Fringe.



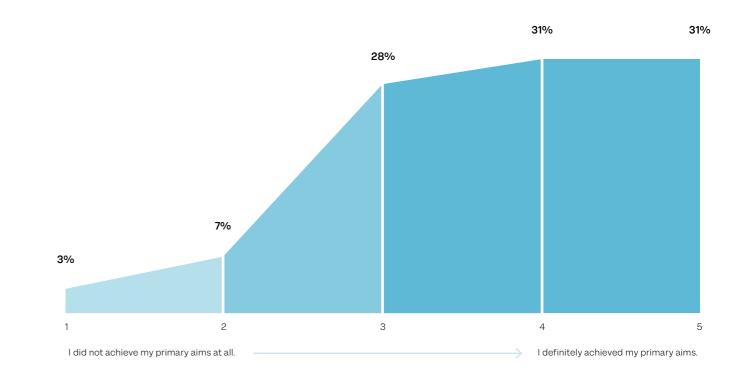
REASONS FOR PARTICIPATING

What were your primary aims in participating in FRINGE WORLD 2018?

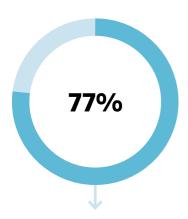


ARTISTS GOALS

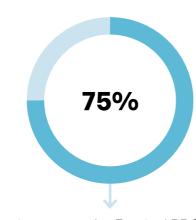
How successful were you in achieving your primary aims at FRINGE WORLD 2018?



DEVELOPMENT OPPORTUNITIES



Of artists agree that **FRINGE WORLD IS AN IMPORTANT PLATFORM** for their work in Western Australia.



Of artists agree the Festival PROVIDES
AN OPPORTUNITY TO SHOWCASE THE
WORK OF EMERGING ARTISTS.

FRINGE WORLD is a key platform for touring artists to develop new work to present at other Festivals and venues around Australia and the world.

FRINGE WORLD stimulates this market through awards and affiliations and its participation in the World Fringe Alliance. Since 2012, FRINGE WORLD has awarded over 150 events with a total prize pool of \$221,000. We are pleased that over \$180,500 of the total prize pool has been awarded directly to over 130 West Australian artists and companies. At the 2018 Festival, over \$33,000 in cash prizes were awarded with \$28,500 being awarded to WA Artists.

Through the success of the new Fringe Fund initiative, two Martin Sims Awards were given in 2017 to two WA theatre productions. In 2018, "Bus Boy" by Rocharschart Beast completed a wildly successful tour to the Brighton Fringe and "My Greatest Period Ever" by Lucy Peach will now embark on an international tour of their work. 2018 Martin Sims Winners, Holland St Productions won the coveted award for their new production of "What Doesn't Kill You [Blah Blah] Makes You Stronger" and will start planning for an international tour in 2019.

Now in its fourth year, The Melbourne Fringe Tour Ready Award brought two successful Victorian productions to Perth; "Cactus and the Mime" and "How to Kill the Queen of Pop." 2018 Winner Michelle Aitken will premiere the award winning "Future's Eve" at Melbourne Fringe in 2018.

International and national festival directors view FRINGE WORLD as a marketplace and a breeding ground where new work is on offer and in 2018, Perth welcomed directors and programming staff from Melbourne Fringe, Melbourne Comedy Festival, Prague Fringe, Assembly Rooms in Edinburgh, Adelaide Fringe, Sydney Fringe and many others. With a strong contingent of Western Australian works making headlines during the Festival, there is much opportunity for our local artists to be profiled and stimulate touring opportunities.

44

"As open-access arts festivals (more or less), they are pay-to-play environments so the artists are taking the risks, so they should be going in with their eyes wide open. There is nobody forcing anyone to take part in these festivals, they are there for people if they need them or want to raise their profile or develop potential career opportunities. ... In the end, all these festivals are there because there is a demand for them. If people don't want to perform there, then they don't have to. They are not perfect of course. None of the Fringe is - it is constantly changing and, I hope, improving, to suit the environment and the people we are there to support. On a personal level, I hate that there are all these charges, but we don't currently have the option to do otherwise and to remain sustainable as arts festivals."

- Julian Caddy, Brighton Fringe Managing Director, **Facebook**, February 2018

PERTH PROFILE BOOSTED BY ARTISTS

Perth and FRINGE WORLD are held in high regard by the network of participating artists.

91%

Of participating artists

RECOMMEND PERTH AS A

PLACE TO VISIT.

86%

Of artists are likely to **RECOMMEND FRINGE WORLD**

TO OTHER ARTISTS.

44

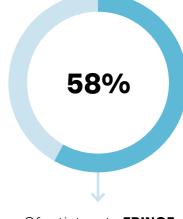
"This was my first year as a performer at FRINGE WORLD - and it was a great learning experience for me. While the shows went well (both were soldout shows), I also learnt a lot about how to better publicise/manage future shows, network with other artists and improve my everyday artist admin requirements to better succeed in the arts industry."

- Gavin Nicklette, Gavin Nicklette: That's What She Said, 2018 FRINGE WORLD Participant

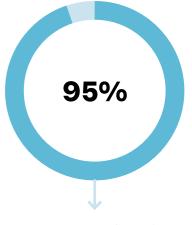
ARTISTS RATE FRINGE POSITIVELY



Of artists believe FRINGE WORLD provides a PRESENTATION SERVICE THAT IS GOOD VALUE.



Of artists rate FRINGE
WORLD'S QUALITY AS EQUAL
TO OR BETTER than other
Fringe Festivals in Australia.



Agree that FRINGE WORLD SHOULD CONTINUE TO BE PRESENTED IN PERTH FOR THE FORESEEABLE FUTURE.

What happened and how artists are being supported.

A series of unfortunate events associated with one of the largest independent programs and event producers in the Fringe led to some huge disappointments for Fringe and its stakeholders and devastating results for Fringe artists in the months following FRINGE WORLD 2018.

WHO ARE JUMPCLIMB?

JumpClimb were a Perth based private commercial company led by two Directors. The company was behind a range of popular events including the Beauvine Food & Wine Festival, New Kingdom, Midlandia, Beaufort Street Festival, Kegs By the Quay and under the umbrella of the FRINGE WORLD Festival, JumpClimb also produced two independent programs - Noodle Palace at Elizabeth Quay and the Palace Society Program, staged across an array of venues in the Perth CBD.

REMOVING NOODLE PALACE FROM THE FRINGE - WHAT HAPPENED?

Over the first two weeks of the Festival, a wide range of serious complaints were received by Fringe from artists and patrons relating to events at Noodle Palace. The Board came to the difficult position that these events did not embody the values that underpin FRINGE WORLD and were not the type of licensed pop-up environment that should be associated with the Festival. A decision was made to distance the Fringe from these events and their management and Noodle Palace was formally removed from the program on the 14th February.

FRINGE WORLD continued to support, promote and ticket the independent artists who were performing in venues associated with the Palace Society.

THE FINANCIAL COLLAPSE OF JUMPCLIMB - WHAT HAPPENED?

Two months after the end of the season, FRINGE WORLD was informed that JumpClimb was potentially preparing for voluntary administration and that Fringe artists that had presented with them were still owed money.

This was a surprise for all parties as the impression was JumpClimb had a hugely successful season from a commercial point of view with very large drinking crowds in the thousands; the one consistant feature at Noodle Palace both pre and post removal from the Fringe program.

As an independent company and presenter of events, FRINGE WORLD did not have any control or involvement in JumpClimb's management and/or mismanagement. Artists presenting as part of JumpClimb programs had contracts with JumpClimb and not with FRINGE WORLD.

Independent programs (i.e. JumpClimb) in the Fringe are paid the box office revenue generated through the ticketing system, and the independent program presenter then pay the artists they have independently contracted with. This is similar to the way other ticketing companies operate with their clients.

FRINGE WORLD had paid all 2018 ticketing income owed to JumpClimb in March. JumpClimb did not then use this to pay the money owed to artists.

WHAT DID FRINGE WORLD DO IN RESPONSE TO THIS SITUATION?

Working closely with legal partner K&L Gates, FRINGE WORLD was swift to implement a range of measures to support the artists affected:

1) Finding out exactly who was owed money and how much. It was revealed that close to \$200K was owed to artists alongside a large array of other production and event service providers.

2) Commencing proceedings to place Noodle Palace Pty. Ltd and JumpClimb Pty. Ltd. into administration.

JumpClimb decided to appoint liquidators to all four of their companies before this occurred.

3) Advancing \$85,000 directly to the artists affected.

This sum equates to relevant ticketing fees generated during the Festival. In some instances this allowed for up to 74% of the debt to some artists to be covered.

4) Acquiring the debt from artists to alleviate demands on them during the liquidation process.

Artists were able to formally assign their claims against JumpClimb to FRINGE WORLD in order to run them as a single claim, alleviating the need for the artists affected to worry about the action as it proceeds during the liquidation process. The majority of artists affected took up this option.

There is no promise that FRINGE WORLD will be successful in efforts to claw back the amounts owed to artists, but any amounts that are recovered will be paid directly to the artists on-top of the \$85,000 advanced.

FRINGE WORLD CEO Marcus Canning made a statement on 25 May 2018, "Although we have no legal obligation to address this situation in these ways, we believe strongly it is our duty. One of our core values is 'Our Success is Defined by the Success of our Artists'. Fringe artists being left high and dry due to a badly managed business collapsing is a devastating situation. We are committing these funds and moving to legally represent the interests of affected artists as it's the ethical thing to do and it's an expression of our values. This is us putting our money where our mouth is, otherwise it's lip service."

WHAT FURTHER ACTION WILL BE TAKEN?

FRINGE WORLD is committed to putting measures in place to better inform as well as protect artists that are working with independent companies in Fringe.

This includes a review of the box office payment system and associated policies and procedures. Alternate models will be presented to the sector and stakeholders during the annual review process for input and feedback in order to identify the preferred model for the 2019 FRINGE WORLD Festival.

Visit fringeworld.com.au for further updates regarding the JumpClimb issue as they progress.



PARTNERSHIP ACTIVITY

FRINGE WORLD is a Non-For-Profit registered charity that relies on support from corporate and government partners to deliver broad benefit to the WA community.

The Festival has been fortuitous and is thankful to have had such a strong contingent of core founding partners including Lotterywest and Woodside alongside MRA, DLGSC and the City of Perth who have been central to Fringe's successful launch and growth in WA in addition to partners who have joined the Fringe family along the way including Gage Roads, oOH! Media, ECU. The West Australian, nova93.7 and K&L Gates.

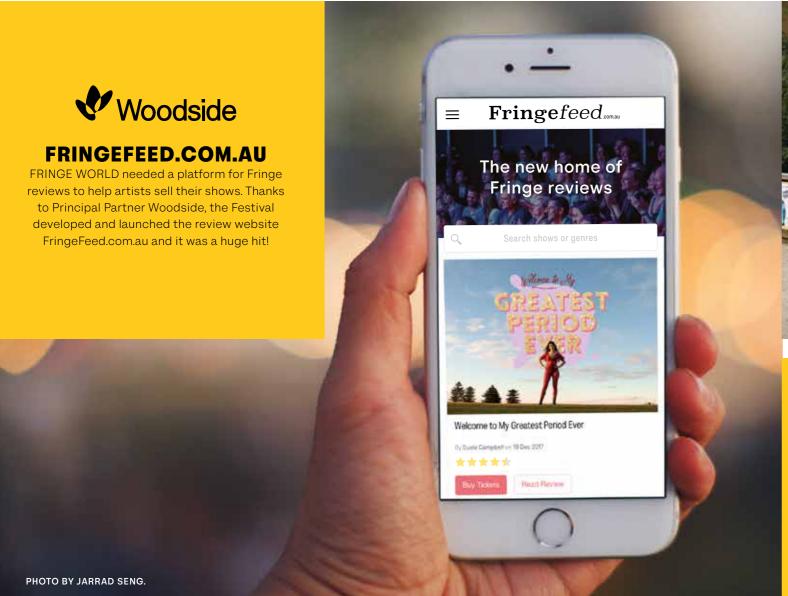
In 2018 Mad Fish and Kleenheat joined the party and as the following pages attest, alignment with a brand that is loved and patroned by hundreds of thousands of Western Australians is an incredible opportunity for Festival partners.

Partners receive outstanding benefits including leveraging the Festival's massive audience reach, unique brand activation opportunities and boutique corporate hospitality experiences.

The following pages highlight some of the brand activations that were featured in the 2018 Festival.

We welcome new partners and if interested, we encourage you to contact us to start a conversation about the potential for partnership with FRINGE WORLD.

50 . FRINGE WORLD FESTIVAL . 2018 IMPACT REPORT PARTNERSHIP ACTIVITY . 51



PRE-PAID TICKET SELF-COLLECT POINT



SELF-COLLECTS + TICKET STOCK

FRINGE WORLD's Principal Supporter and hero to the Western Australian community, Lotterywest had exclusive rights to advertising on FRINGE WORLD ticket stock and the FRINGE WORLD ticket printer self-collects.

Kleenheat KLEENHEAT SIZZLE FACTOR

Kleenheat was a new partner for the 2018 Festival and together they developed the digital brand activation, Kleenheat Sizzle Factor, to help customers navigate the program and find what to see.

3.75

In annual surveying, awareness of the Kleenheat sponsorship of FRINGE WORLD was 3.75 times higher than the norm, a fantastic result for the first year of partnership.

Top 5

Fringe related e-newsletter content appeared in 5 of Kleenheat's most popular links during the campaign period.









REVIEWS hosted on the website.

28,000+

WEBSITE SESSIONS.

1 in 4

Of the surveyed audience

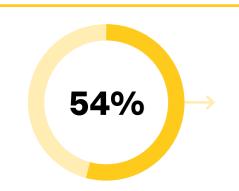
PURCHASED MORE TICKETS BECAUSE OF FRINGEFEED.





CITY OF PERTH TOOT TOOT'S

City of Perth and FRINGE WORLD developed the City of Perth Toot Toots, a free rickshaw service giving punters fun, free rides between key Festival hubs in the city. The City of Perth Toot Toots added to the vibrancy of the city during FRINGE WORLD, and were a fun way to engage with the Festival's huge audience.



Of the surveyed audience **VISITED** FRINGEFEED.COM.AU AT LEAST ONCE FROM **JAN - FEB 2018.**



MAD FISH

MADFISH WINE TASTING
FRINGE WORLD and MadFish gave visitors to

The Pleasure Garden the opportunity to sample their exciting range of contemporary, cool climate



FRINGE WORLD CONCIERGE SERVICE: POWERED BY WOODSIDE

A pop-up at Woodside Plaza for customers and Woodside staff to purchase FRINGE WORLD tickets and Gift Vouchers.









HELLO SUNSHINE

Gage Roads Brewing Co. and FRINGE WORLD developed the apple cider Hello Sunshine for the 2017 Festival. The delicious drop was rolled out for commercial release later in the year, with a portion of profits going to the Fringe Fund, helping Fringe Artists shine.





THE EDITH SPIEGELTENT

The partnership between Edith Cowan University and FRINGE WORLD enables the Festival to utilise The Edith Spiegeltent as one of the key performance spaces at the Fringe.





CHANNEL 9'S MINI GOLF CHALLENGE

People of all ages had fun playing the free Channel Nine Mini Put Put at The Pleasure Garden.





ABC RADIO PERTH VARIETY GALA

ABC Radio Perth rounded up some of the top acts from the Festival to perform at their Variety Gala and gave away the tickets to some lucky winners!



MEDIA & MARKETING REACH

Fringe has had great success at reaching an ever-increasing Perth and intrastate audience through delivering a mass-market campaign that encompasses website, e-news and social media as well as print, radio, TV and outdoor advertising, plus a massive print collateral and signage campaign.

The 2018 media campaign generated total media value of almost \$10 million across print, online, TV, social and radio platforms.

The media coverage that was generated reached a cumulative potential audience of almost 52 million people.

56 . FRINGE WORLD FESTIVAL . 2018 IMPACT REPORT MEDIA & MARKETING REACH. 57

MEDIA COVERAGE

\$9,935,846 **MEDIA VALUE**

52,206,157 **AUDIENCE REACH**

"FRINGE WORLD offers entertainment for absolutely everyone as well as enduring benefits for the WA community" - Hon. David Alan Templeman MLA Minister for Local Government; Heritage; Culture and the Arts

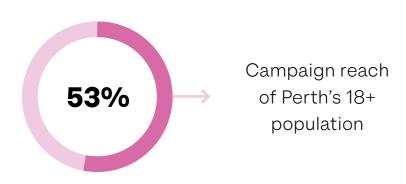
- Fraser Beattie, Katie McDonald, \$10m in tickets sold at Fringe, Business News, 30 July 2017



250,000

PROGRAMS DISTRIBUTED AROUND PERTH

OUTDOOR ADVERTISING REACH



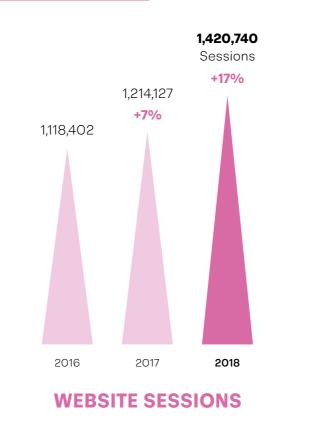
TOTAL REACH OF

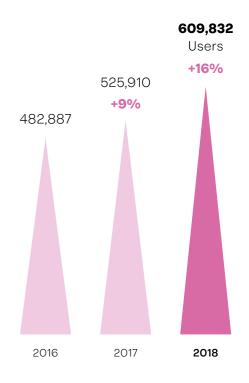
913,400

PEOPLE WHO SAW AN AD ON AVERAGE OF

11.6 times!

WEBSITE TRAFFIC





WEBSITE USERS

42% New Visitors

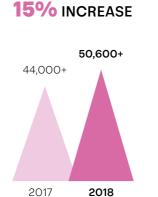
SOCIAL MEDIA



2017

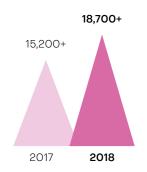
2018













OUTER FRINGE

FRINGE WORLD is a platform that has been embraced by regional Western Australia through touring events and independent programs.

Due to the state government review of regional event support, the Festival was unable to deliver an Outer Fringe touring program in 2018.

Prior to 2018, FRINGE WORLD has toured to 17 regional and remote towns both during the annual FRINGE WORLD Festival and throughout the year including Broome, South Hedland, Karratha, Exmouth, Carnarvon, Mullewa, Geraldton, Kalgoorlie, Merridin, Northam, Bunbury, Donnybrook, Bridgetown, Ravensthorpe, Esperance, Hopetoun and Albany.

This has included both small scale one-off touring acts and more extensive programs built around use of FRINGE WORLD's pop-up venues including De Parel Spiegeltent and The Gold Digger venue.

In 2018, the Festival's regional engagement occurred primarily through the fabulous independent program in Geraldton, Funtavia which grows from strength to strength each year.

Alongside other year round and summer programs in development, FRINGE WORLD looks forward to continuing to stimulate Fringe right across the state in coming years.

"I love that it's outdoors & up amongst the city building & lights. It's such a unique experience. Makes a night out with hubby feel like an adventure (makes us feel young!)."

- Rooftop Movies customer from City Beach

ROOFTOP MOVIES

In 2011, ARTRAGE went to City of Perth Parking (CPP) with the idea to trial a rooftop cinema on their Roe Street carpark, sell parking as part of movie ticket packages and potentially both increase weekday parking revenue for CPP and provide a new revenue stream to help continue FRINGE WORLD's positive work in the neighbourhood.

Since then Rooftop Movies has grown to become one of Perth's iconic annual summer entertainment offerings and is often profiled internationally as one of the top ten best outdoor cinemas in the world!

Rooftop Movies has steadily grown market traction year on year with average nightly attendance now over 85%. It's an initiative that delivers great benefit to local businesses. Based on extensive audience surveying and ticketing data, the direct spend by people visiting Rooftop Movies this season in surrounding restaurants and bars was \$682,216 and a total of \$151,846 CPP parking revenue was generated during the season by attendees.

93% of surveyed audiences agree that Rooftop Movies contributes to making Northbridge a more vibrant place and 91% are more likely to revisit Northbridge as a result of their visit to Rooftop Movies.

ARTRAGE is currently awaiting the results of a CPP EOI on future use of the carpark and hope to continue to develop this world-class initiative in partnership with CPP and the City of Perth this coming summer.



ROOFTOP MOVIES AT A GLANCE

44

"Unique view of Perth cbd, great vibe and an event I look forward to attending each year!"

- Rooftop Movies customer from Morley

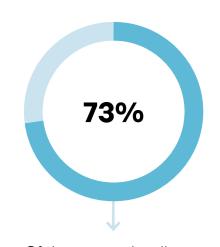
97
FILM EVENTS

44
SOLD OUT EVENTS

85%
AVERAGE NIGHTLY
ATTENDANCE

25,211

TICKETED ATTENDANCE



Of the surveyed audience also **ATTENDED A FRINGE WORLD EVENT IN 2018.**



Of the surveyed audience
PLAN TO ATTEND ROOFTOP
MOVIES AGAIN IN THE
FUTURE.



Think **ROOFTOP MOVIES IS UNIQUE** in relation to other venues/events.

44

"It's a great atmosphere and something different, I love bringing friends who have never been before."

- Rooftop Movies customer from Maylands



FRINGE WORLD WARBURTON GROUP

GIRLS SCHOOL CREATIVE PRECINCT

It's perched on the highest point of East Perth, overlooking the WACA and on the pathway to the new Optus Stadium.

It operated as Perth's first dedicated girls school for thirty years, a Police centre for fifty years and over the next few years will be transformed into a development and presentation space, incubator and home for the innovative and the new across all forms of creative disciplines and industries.

With support from the owners and future developers of the sprawling historic 1930s Old Perth Girls School, ARTRAGE has acquired a head-lease on this extraordinary citadel of a building and in confluence and partnership with like-minded parties, will roll out new occupations and activations in and around the building over a number of stages in coming months and years.

Girls School Cinema is Stage 1 of the plan. We're hoping the cinema and all that follow helps to stimulate and grow a thriving creative precinct that will introduce a whole new dash of life to the East Perth neighbourhood and offer new opportunities for Fringe artists, year-round. Watch this space!

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"The Perth Girls School site will be transformed into a thriving, creative, community space under plans floated by Adam Zorzi and Rod Hamersley. "You need that artistic and cultural element to make a place work."

- Helen Shield, Creative community hub planned for old Perth Girls' School, The West Australian. 28 June 2017



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"Clint Nolan, whose Northbridge venues include Joe's Juice Joint and Henry Summer, said it was his favourite time of year. "Business in Northbridge is great during this time of year. Fringe brings many more people to the area and unites the city"

- Kate Emery. Fringe sets records as crowds turn to the city. The Weekend West, 24-25 February 2018

ECONOMIC IMPACT

Festival events were presented in 155 venues located in 24 suburbs spread across the Perth Metropolitan area. Local businesses located nearby, benefit from the Fringe activity in a number of ways. This is especially true for Perth City and Northbridge, where Fringe attracts a massive new and age-diverse audience to the area. The direct and flowon benefits for these businesses is significant.

There's also significant new-money-spend in the local economy from the large numbers of participants who travel from intrastate, interstate and overseas to present shows at the Festival, alongside visiting audience members.

ECONOMIC IMPACT

95%

OF CUSTOMERS LIVE IN THE PERTH METRO AREA

FRINGE WORLD delivered an estimated spend of more than \$73.1 MILLION!

Including pre- and post-event expenditure in restaurants, bars and accommodation.

The economic impact of the Festival is also registered through direct spend to produce and present the 155 venues as well as spend by the 1,303 national and international visiting artists and participants of the Festival.

Additionally, the indirect effect of FRINGE WORLD on the Perth economy after application of relevant gross value added multiplier is over \$101.6 million.



789/o
Of the audience ATE AT
A RESTAURANT before or
after attending a

FRINGE WORLD venue.



729/oOf the audience **HAD A DRINK**

AT A BAR / NIGHTCLUB / CAFE before or after attending a FRINGE WORLD venue.

BUSINESS IMPACT



Of surveyed City of Perth businesses think FRINGE WORLD has contributed to making

NORTHBRIDGE AND PERTH CITY A MORE VIBRANT PLACE.



Agree that FRINGE
WORLD CONTRIBUTES
TO MAKING PERTH
SPECIAL AS A CITY.



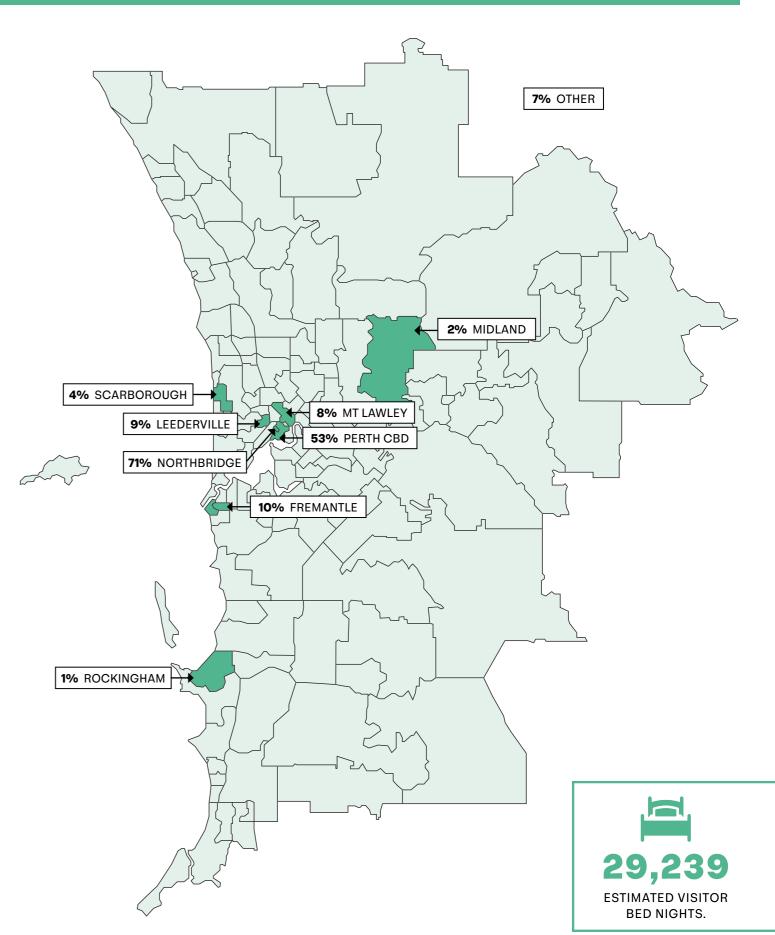
Agree that FRINGE
WORLD CONTRIBUTES
TO MAKING
NORTHBRIDGE AND
PERTH FEEL SAFER.



Think that FRINGE
WORLD INTRODUCES
NORTHBRIDGE
TO PEOPLE WHO
WOULDN'T NORMALLY
VISIT.

VISITOR EXPENDITURE BY SUBURB

Where was your average daily expenditure prior to and after attending a FRINGE WORLD venue? $(choose\ up\ to\ 3)$



VISITOR GROSS EXPENDITURE

In this section are the calculations made in order to estimate the gross expenditure by the Festival's audience, a key component of the economic impact of FRINGE WORLD Festival. Of the audience surveys collected, the vast majority were completed by visitors who lived in the Perth metropolitan area (95.5%).

LOCATION	NUMBER	%
City of Perth	785	13.6%
Elsewhere in the Perth Metropolitan Area	4,740	81.9%
Elsewhere in Western Australia	180	3.1%
Elsewhere in Australia	38	0.7%
Overseas	46	0.8%

DAY VISITORS VS OVERNIGHT VISITORS

As per survey responses from previous years, most respondents were FRINGE WORLD 'day visitors' from Perth. It is worth noting that across festival years, there is an ever slightly upward trend in 'day visitors' from outside Perth CBD.

TYPE OF RESPONDENT	%
Day visitors (from City of Perth)	12.8%
Day visitors (from elsewhere in the Perth Metro Area)	80.0%
Day visitors (from outside Perth)	2.2%
Staying visitors (from City of Perth)	0.2%
Staying visitors (from elsewhere in the Perth Metro Area)	2.7%
Staying visitors (from outside Perth)	2.1%

Using our public survey response data, the gross daily expenditure during the average trip to the FRINGE WORLD Festival was calculated for each type of visitor based on location of origin.

AVERAGE DAILY/NIGHTLY EXPENDITURE PER PERSON OUTSIDE FRINGE WORLD SPEND

LOCATION	TOTAL AVERAGE DAILY SPEND
City of Perth	\$84
Elsewhere in the Perth Metropolitan Area	\$82
Elsewhere in WA	\$207
Elsewhere in Australia	\$175
Overseas	\$239

To reach a gross visitor expenditure figure for the Festival duration, these daily averages were then multiplied by the average number of days (or paying nights in the case of accommodation) spent across the whole FRINGE WORLD Festival by each type of respondent.

NUMBER OF DAYS / NIGHTS ATTENDED

LOCATION	AVERAGE NUMBER OF DAYS ATTENDED
City of Perth	6.3
Elsewhere in the Perth Metropolitan Area	5.1
Elsewhere in WA	4.3
Elsewhere in Australia	6.4
Overseas	5.1

Data on the total number of tickets sold overestimates the number of unique visitors, since most attend more than one event, over a range of days.

To estimate the number of unique festival visitors, the gross number of tickets sold plus estimated free attendance were split into different types of visitors (based on location) using the proportions from the audience survey.

These attendance figures by location type were then divided by the average number of events each type of visitor reported attending in the survey to reach an estimated number of unique visitors of each type. The number of unique visitors by type is shown in the following table, with a total unique visitation of 173,995 for purposes of economic impact analysis.

A key step in economic impact calculations is to assess the proportion of expenditure made by visitors that would have been spent in Perth in any case. To account for this, we apply a downwards additionality adjustment to the average \$ expenditure per person figures based on statistics derived from survey answers.

Once gross visitor expenditure had been calculated for the average trip days in each category, it was then multiplied by the unique visitor numbers in each category to reach an estimated total gross visitor spend of \$59 million, with 77% spent by Perth based day trippers to the Festival. This is nearly 20% higher than 2017's figure of \$50m.

ESTIMATED TOTAL GROSS SPEND

LOCATION	TOTAL VISITORS	AVERAGE DAYS	AVERAGE SPEND PER DAY	ADDITIONALITY ADJUSTMENT	TOTAL SPEND	% OF OVERALL SPEND
City of Perth	19,558	6.3	\$84	35.2%	\$6,706,861	11.4%
Elsewhere in the Perth Metropolitan Area	145,493	5.1	\$82	24.8%	\$45,755,570	77.5%
Elsewhere in Western Australia	6,532	4.3	\$207	25.6%	\$4,325,715	7.3%
Elsewhere in Australia	991	6.4	\$175	21.1%	\$875,727	1.5%
Overseas	1,421	5.1	\$239	21.7%	\$1,356,201	2.3%
TOTAL	173,995				\$59,020,074	100%

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"February is generally one of the busiest months for my business. A great contributor to this is our proximity to Russell Square and all the events held there.

There is a real buzz around Northbridge during the event. People are dining at the restaurants, enjoying a drink and the pubs and enjoying the vibe. Northbridge seems friendlier at this time. Northbridge seems to have a party/event feel to it every night of the festival. It is great to see people out enjoying the shows."

- Daniel Godoy, General Manager, Best Western Northbridge Apartments

PERFORMER EXPENDITURE

From originally having 145 visiting international and interstate performers and production personnel in the first year of the Festival, this number has grown steadily over festivals to 1,303 participating visitors in 2018.

We have endeavoured to increase average travelling Artist season lengths to help ensure they get the most out of their FRINGE WORLD festival stints. Based on the average stay of 10 nights per intrastate participant, 10.1 nights per interstate participant and 15.3 nights per international participant, visiting Festival participants spent an estimated 14,928 nights in Perth during their stay in 2018. This is 16% higher than the 12,819 figure of 2017.

We look at expenditure by four different categories of performers: local performers from within Perth Metropolitan area, performers from within WA (intrastate), performers from elsewhere in Australia (interstate) and those from outside of Australia (international).

To approximate the expenditure of performers from Perth Metro area, we use the box office payments made to local performers as well as fees paid to Perth artists for contributions to free programs. Since these performers are Perth-based, we have assumed that the bulk of their fees generated through the Festival will end up being spent in the Perth economy. As this revenue has been included in the FRINGE WORLD expenditure figures they are not considered further here

Based on our participant survey data, we calculate average daily expenditure for intrastate artists at \$185, interstate artists at \$141 and \$171 for international artists. These figures are in-line with those used by the Australian Department of Resources, Energy and Tourism to calculate tourism expenditure.

Travel expenditure for performers is not included in estimated performer expenditure, since the bulk of this expenditure will be on travel from elsewhere in Australia or from overseas, accruing to airline and travel operators based outside of Perth.

VISITING PERFORMER EXPENDITURE CALCULATIONS

TYPE OF PERFORMER	TOTAL NIGHTS/DAYS	TOTAL AVERAGE DAILY SPEND	TOTAL EXPENDITURE
Perth	n/a	n/a	n/a
Elsewhere in Western Australia	1,939	\$185	\$358,715
Elsewhere in Australia	7,787	\$141	\$1,097,967
Overseas	5,202	\$171	\$889,542
TOTAL VISITING PERFORMER EXPENDITURE	14,928		\$2,346,224

ORGANISER EXPENDITURE

This expenditure includes all spending on staff, office running costs and suppliers. The totals for each of these categories of income and expenditure are displayed in the Organisational Expenditure chart.

CATEGORY	AMOUNT
Total expenditure on WA artists	\$1,787,598
Total expenditure on staff	\$6,291,098
Total expenditure on festival office costs	\$419,988
Other expenditure related to staging the festival	\$3,254,235
TOTAL	\$11,752,919

TOTAL GROSS EXPENDITURE

Combining the total estimated gross expenditure by visitors and performers at the FRINGE WORLD Festival with the expenditure by festival organisers (which includes expenditure by festival management on suppliers, staff and office costs), we reach a total gross expenditure figure of \$73,119,217.

SOURCE OF EXPENDITURE	AMOUNT
Audience	\$59,020,074
Performers	\$2,346,224
Organisers	\$11,752,919
TOTAL GROSS EXPENDITURE	\$73,119,217

VISITOR GROSS EXPENDITURE VS TOTAL GROSS EXPENDITURE

Calculated gross expenditure totals for FRINGE WORLD Festival 2018 is 21% higher than last year, with each expenditure component having increased in practically equal measures. Last year's balance of expenditure sources is maintained this year.

It is clear that more than ever the major economic impact of the Festival is generated by the audience. In terms of gross expenditure, 81% is accounted for by the audience. The performers, contribute 3% of the total with the organisers accounting for the remaining 16% (\$11.75m).

TYPE OF RESPONDENT	TOTAL 2017 SPEND	% OF OVERALL SPEND	TOTAL 2018 SPEND	% OF OVERALL SPEND
City of Perth + Perth Metropolitan Area	\$44,136,797	88%	\$52,462,431	89%
Elsewhere in WA	\$4,118,275	8%	\$4,325,715	7%
Elsewhere in Australia	\$896,322	2%	\$875,727	1%
Overseas	\$859,762	2%	\$1,356,201	2%
TOTAL VISITOR EXPENDITURE	\$50,011,156	82%	\$59,020,074	81%
TOTAL GROSS EXPENDITURE	\$60,646,626		\$73,119,217	

COMPARISON OF VISITOR GROSS EXPENDITURE WITH MULTIPLIER AS A PROPORTION OF TOTAL GROSS EXPENDITURE 2017 V 2018

SOURCE OF EXPENDITURE INCLUDING GROSS VALUE MULTIPLIER EFFECT	TOTAL 2017 SPEND	% OF OVERALL SPEND	TOTAL 2018 SPEND	% OF OVERALL SPEND
City of Perth + Perth Metropolitan Area	\$61,350,148	73%	\$72,922,779	71%
Elsewhere in WA	\$5,724,402	7%	\$6,012,744	6%
Elsewhere in Australia	\$1,245,888	1%	\$1,217,261	1%
Overseas	\$1,195,069	1%	\$1,885,119	2%
PERFORMERS	\$2,857,391	3%	\$3,261,251	3%
ORGANISERS	\$11,925,913	14%	\$16,336,558	16%
TOTAL GROSS EXPENDITURE INCLUDING MULTIPLIER	\$84,298,811		\$101,635,712	

MULTIPLIED TOTAL EXPENDITURE AND FTE JOBS CREATED

In determining the economic impact of FRINGE WORLD, we measure the knock-on effects of gross expenditure, since part of the money spent in shops, on suppliers, etc. will then be re-spent by those shops and suppliers on other things, and so on.

We therefore apply a Gross Value Added multiplier of 1.39, taken from Multipliers for Culture-related Industries by the National Centre for Culture and Recreation Statistics of the Australian Bureau of Statistics (ABS)1. This takes the total multiplied expenditure to \$101,635,712. The individual multiplied figures are reproduced below.

We also apply a Full-Time Equivalent (FTE) employment multiplier of 22 jobs per \$1m spent per annum to the Total Gross Expenditure figure with multiplier (again in keeping with ABS standards), to convert this expenditure into jobs created by the spending associated with FRINGE WORLD.

These figures of \$101.6m and 2,236 FTE jobs represent a 21% increase compared to 2017's totals of \$84m and 1,855 FTE jobs generated in WA.

1. Cultural Ministers Council: Cultural Data Online, 'Multipliers for culture-related industries', http://culturaldata.arts.gov.au/publications/statistics_working_aroup/other/multipliers for culture-related industries. 23 June 2011

MULTIPLIED TOTAL EXPENDITURE

SOURCE OF EXPENDITURE	TOTAL GROSS EXPENDITURE	TOTAL GROSS VALUE ADDED (WITH MULTIPLER)	FTE JOBS FROM GROSS EXPENDITURE
Audience	\$59,020,074	\$82,037,903	
Performers	\$2,346,224	\$3,261,251	
Organisers	\$11,752,919	\$16,336,558	
Total	\$73,119,217	\$101,635,712	2,236

INTRASTATE, INTERSTATE AND OVERSEAS VISITOR GROSS & MULTIPLIED EXPENDITURE

Extracting the exclusive economic impact of visitors, both participant and audience, to FRINGE WORLD from elsewhere in WA, interstate and overseas is noteworthy when considering 'new' visitation to Perth metropolitan area, rather than total visitation to the City of Perth through the FRINGE WORLD Festival.

Last year's figure was \$10,526,086 (or \$14,631,260 with multiplier)

INTRA / INTER / OVERSEAS VISITOR (IIOV) EXPENDITURE CALCULATIONS

TYPE OF VISITOR	TOTAL UNIQUE VISITORS	AVERAGE DAYS	AVERAGE SPEND PER DAY	TOTAL SPEND
Intrastate Audience	6,532	4.3	\$207	\$5,814,133
Interstate Audience	991	6.4	\$175	\$1,109,920
Overseas Audience	1,421	5.1	\$239	\$1,732,057
Intrastate Artist	192	10.1	\$185	\$358,752
Interstate Artist	771	10.1	\$141	\$1,097,981
Overseas Artist	340	15.3	\$171	\$889,542
TOTAL	10,247			\$11,002,385
MULTIPLIED TOTAL	1.39			\$15,293,315

SPEND IN PERTH PER DOLLAR INVESTED

FIGURE/RATION	AMOUNT
Total Value Added IIO Visitor Expenditure, (IIOV)	\$15,293,315
Total Gross Expenditure (TGE)	\$73,119,217
Total Gross Value Added (TGVA)	\$101,635,712
Investment by State of WA	\$1,250,000
Intra & Interstate & Overseas (IIOV) spent per \$1 invested	\$12.23
Gross amount spend (TGE) per \$1 invested	\$58.50
Gross revenue generated (TVA) per \$1 invested by the State of Western Australia.	\$81.31

RETURN ON INVESTMENT IN FRINGE WORLD

In terms of FRINGE WORLD as an investment, the following shows the Total Gross Expenditure and (multiplied) Gross Value Added for each dollar of investment by the State of Western Australia, equating to a ratio of 1:81.31, an increase on 2017's ratio of 1:70.4.

EFFECT ON WA ECONOMY PER DOLLAR INVESTED

FIGURE/RATION	AMOUNT
Total Gross Expenditure (TGE)	\$73,119,217
Total Gross Value Added (TVA)	\$101,635,712
Investment by State of WA	\$1,250,000
Gross amount spent (TGE) per \$1 invested	\$58.50
Gross revenue generated (TVA) per \$1 invested	\$81.31

"The state's creative sector provides jobs and is vital to our economic diversification and growth. Building a strong arts and cultural industries sector is one of the pillars of the McGowan government's Creative WA policy. More than 41,000 Western Australians are employed in the creative sector. Events such as FRINGE WORLD and Perth Festival help create jobs directly through the hundreds of events staged, but also indirectly through associated jobs in areas such as hospitality and tourism. We should all be very proud of the successes of these two significant cultural festivals and the contribution that they make to the state, delivering significant social and economic impact and providing enjoyment to the Western Australian community."

- HON David Templeman MLA, Minister for Local Government; Heritage; Culture and The Arts. PREMIER ARTS FESTIVAL SEASONS Extract from Hansard [ASSEMBLY — Tuesday, 20 March 2018] p976b-976b



"In the end, the larger and more successful a Fringe becomes, the more lives and livelihoods it touches and the more careful we must be to accommodate them and the more we are opened up to criticisms from all sides.

We can't please everyone but then again not everyone needs to take part or attend. It can be fashionable to bash the corporatisation of large Fringe festivals, but ... it's not the corporate and money-making gravy train that some people may think it is. It is bloody hard work."

- Julian Caddy, Brighton Fringe Managing Director, **Facebook**, February 2018

FRINGE WORLD FUTURE

Our vision is to embed FRINGE WORLD in the hearts and minds of all Western Australians and our mission is to build the world's strongest Fringe Festival.

Whilst we cannot yet claim to have achieved either of these aspirations, the ongoing growth and success of the Festival indicates household name status is within grasp for FRINGE WORLD in WA.

Building an organisation strong enough to sustainably drive the world's third largest Fringe into its second decade is another challenge entirely and one that requires ongoing focus and ultimately, increased financial support.

FRINGE WORLD INCOME AND EXPENDITURE BREAKDOWN

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"I'd argue that there are no greater platforms for artists wanting to be noticed than those offered by Edinburgh, Adelaide, Perth and Brighton. And it's all to do with critical mass. And organising 'critical mass' takes a lot of time and energy and, yes, money. And participating artists benefit from this massive promotional and marketing umbrella by virtue of paying their registration. All costs beyond this are, ultimately, a matter for the act and the presenting venue."

- Barry Strickland, Founding FRINGE WORLD Board Member and former Perth International Arts Festival Board Member. Facebook, February 2018 This is the first year that FRINGE WORLD has illustrated its financial operations in annual Impact Reportage in such detail. Understanding what it costs to produce and promote WA's largest annual event should help to address ongoing questions about where fees and revenue generated by the Festival gets spent.

As is obvious, FRINGE WORLD relies very strongly on sales through box office, bar, management and ticketing fees to survive and subsidise Festival participation for all artists.

As the second largest revenue area, inkind sponsorship is made up of \$1.4m of media and marketing partnerships and the rest is made up of pro bono site use, site services, venue use and legal services.

On the expenditure front, it is clear that almost half of annual turnover is paid out to artists and arts companies and the

costs associated with building the Festival, running key sites and providing production and technical services across all venues in the presentation of artists are also significant.

As is also evident, core management and administration costs are comparatively small and illustrate how lean the organisation is that produces the Fringe. It's currently a core team of twelve FT staff that drive such an enormous output, with staffing levels only swelling seasonally in alignment with the Festival cycle.

There is a pressing strategic need to significantly bolster the HR structure of the organisation in coming years for the long term health, sustainability and strength of the Festival and its year-round programs.

Marketing costs are also large, but are made up of significant inkind partnership values. This is definitely a budget area that

will need substantial cash increase in future if the Fringe is to successfully attract more mainstream local market and ideally start to market the Festival interstate and overseas.

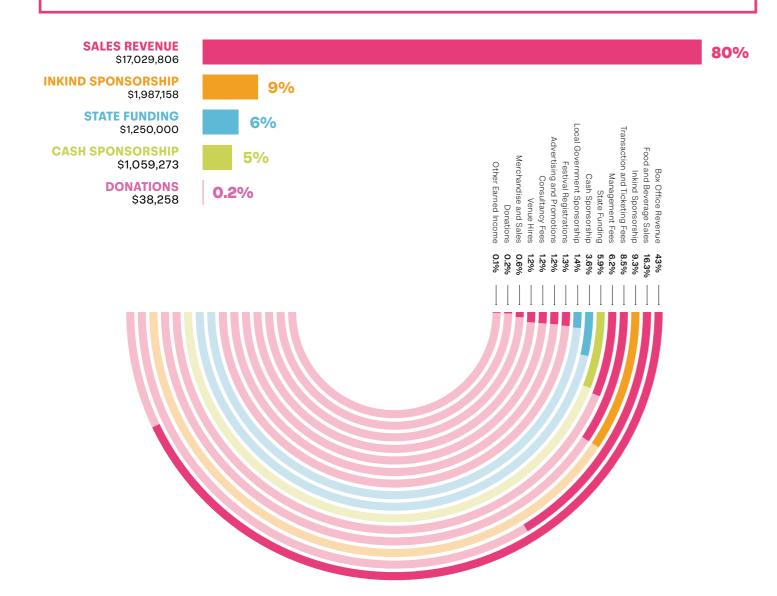
The big Fringes of the world such as Edinburgh and Adelaide receive significant national, state and city funding to sell their festivals to international markets alongside core operational funding and special initiative support when necessary.

Although FRINGE WORLD was built to be less government reliant than traditional big Fringe Festivals, it is timely to consider how a smart increase in State investment in Fringe could deliver great ongoing results for WA.

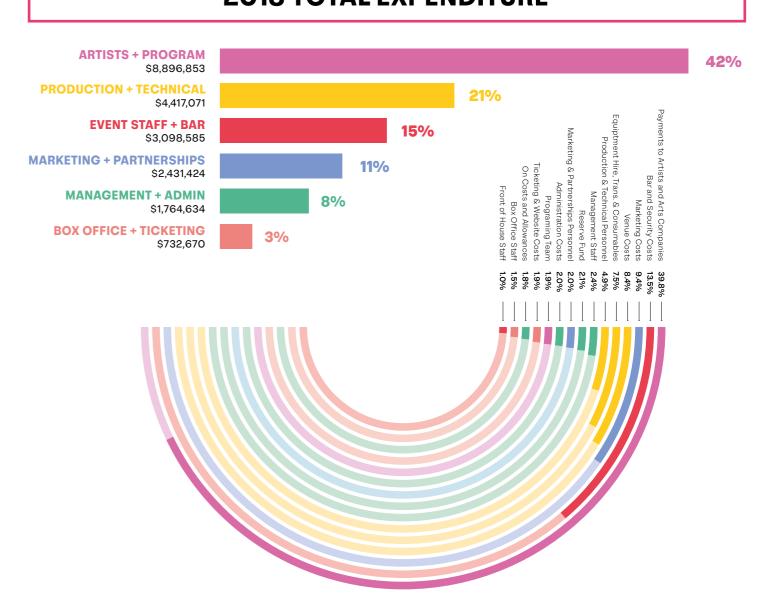
Often the false impression is that the most successful players on the field don't need the extra support, when infact they're the ones best placed to take the game to the next level with a bit of extra juice. ARTRAGE is definitely one of the WA's best players.

\$21.36 MILLION

2018 TOTAL INCOME



\$21.34 MILLION 2018 TOTAL EXPENDITURE



FINANCIAL MODELLING FOR THE FUTURE

As is illustrated in BNIQs annual research around the financial performance of WAs cultural organisaitons tabled below, ARTRAGE has risen to No. 3 in terms of total revenue, second only to Screenwest and the WA Museum.

ARTRAGE ranks No. 1 on the list with significant margins in terms of levels of operating revenue and the numbers of patrons engaging with the work of the organisation.

In contrast to this, ARTRAGE ranked 12th in terms of state funding investment. The Fringe's audience reach, sales success and comparatively low amount of Government funding compared with total revenue illustrates the sensational level of value ARTRAGE already delivers to the state each year and the opportunity to provide a more equitable level of investment in the future.

Over the coming years it is imperative for FRINGE WORLD to increase government support, establish new sponsorships, expand existing corporate partnerships and look to grow philanthropic support towards the Fringe and its artists if the Festival is to continue to deliver value sustainably.

A 2029 Bicentennial Fringe plan is in the pipeline and the 2019 FRINGE WORLD plan is already bedding down including additions and special surprises for The Pleasure Garden alongside a significant new presence at Yagan Square.

The Festival is in discussion with a number of local councils who will be dipping their toes in the Fringe waters for the first time in 2019, which alongside the return of many favourite Fringe venues around the 'burbs will mean that the people of Perth can Fringe in their neighbourhood more than ever before.

It is a strategic aim of the Festival to deliver an extended marketing campaign to further increase audiences to all shows across the Fringe in coming years and to improve support and services to artists, year-round.

The Girls School Creative Precinct will be a part of this improvement, providing new opportunities for Fringe artists to develop work throughout the year in preparation for successful Fringe seasons.

The Fringe also aspires to have a positive funding relationship with Tourism WA in coming years as it makes simple sense. FRINGE WORLD has spent seven years growing a Festival that adds popularity and largesse to Perth's summer Festival season, a critical mass of local audience to support it and a dedicated and eager network of artists ready to keep creating and growing the Festival.

It's now time to sell WA's FRINGE WORLD experience to targetted interstate and overseas markets as part of Perth's Summer Festival Season. It's Perth's very best time of year to welcome the world.

FRINGE FUNDING CASE STUDY - ADELAIDE FRINGE

Two years ago Adelaide Fringe experienced a groundswell backlash from artists in response to a general climate of poor sales and cost of participation perceived as being too high. In response, the Government of SA committed an extra \$1 million annually to Adelaide Fringe ontop of the significant levels of core funding already provided. This million dollar top-up was directed towards the removal of inside ticketing fees paid by artists, meaning Adelaide Fringe is now able to promote itself as the most affordable Fringe for artists in Australia. Another example of how smart, targetted and innovative funding by the Government of SA has capitalised on the potential of their Fringe is the 'Made in Adelaide' initiative - jointly funded by the South Australian Tourism Commission (SATC), Arts SA and the City of Adelaide working in partnership with Adelaide Fringe to sell shows from Adelaide at Edinburgh Fringe and sell Adelaide as a tourism destination to the massive crowds gathered at Edinburgh each year - madeinadelaide.net

"South Australia is welcoming an unprecedented number of visitors, with our tourism industry worth more than ever before. Acclaim keeps coming, including recognition as one of Lonely Planet's top five regions to visit in 2017. Events and festivals give visitors an incentive to plan their travel here and are a powerful way to tell our state's story. This occurs not only through first-hand experiences, but via the extensive global media coverage our events receive." - tourism.sa.gov.au

BNIQ - ARTS AND CULTURE ORGANISATIONS 2018

ORGANISATION	CURRENT RANK	YEAR EST.	TOTAL PATRONS (MOST RECENT FINANCIAL YEAR)	TOTAL REVENUE (MOST RECENT FINANCIAL YEAR)	TOTAL REVENUE (PREVIOUS FINANCIAL YEAR)	OPERATING REVENUE	WA STATE GOVERNMENT FUNDING	FEDERAL GOVERNMENT FUNDING	PRIVATE SECTOR GRANTS, SPONSORSHIP AND DONATION	OTHER REVENUE
WA Museum	1	1891	472,746	\$31,657,000	\$37,589,000	\$2,568,000	\$25,882,000	\$464,000	\$1,291,000	\$1,366,000
Screenwest	2	1992	-	\$21,709,000	\$14,446,000	\$649,000	\$17,677,000	-	\$51,000	\$3,332,000
ARTRAGE / FRINGE WORLD Festival	3	1983	758,184	\$20,011,226	\$20,233,977	\$16,565,013	\$1,098,820	\$0	\$2,347,393	-
WA Symphony Orchestra	4	1928	206,844	\$19,699,246	\$19,139,024	\$5,735,768	\$3,235,164	\$7,076,851	\$3,651,463	-
Perth Theatre Trust	5	1979	508,216	\$18,579,000	\$21,316,000	\$6,067,000	\$10,788,000	-	\$585,000	\$1,139,000
Perth Festival	6	1953	360,000	-	\$17,600,000	\$6,800,000	\$8,100,000	\$30,000	\$2,000,000	\$50,000
Art Gallery of WA	7	1895	307,781	\$15,875,000	\$16,072,000	\$1,171,000	\$10,125,000	\$0	\$2,927,000	\$1,652,000
West Australian Ballet	8	1952	73,991	\$10,543,559	\$9,581,244	\$3,460,963	\$3,387,785	\$916,156	\$2,629,283	\$149,372
FORM	9	1968	52,000	\$9,057,304	\$9,196,425	\$2,436,576	\$729,073	\$490,712	\$3,628,306	\$1,772,637
Black Swan State Theatre Company	10	1991	42,479	\$6,067,851	\$6,054,741	\$1,851,439	\$1,887,130	\$708,442	\$1,521,356	\$99,484
WA Opera	11	1967	42,476	\$5,279,821	\$5,417,514	\$1,068,613	\$2,095,212	\$470,830	\$1,414,330	\$229,836
Country Arts WA	12	1994	229,874	\$4,969,857	\$4,028,410	\$306,185	\$3,794,413	\$802,337	\$29,577	\$37,355
Broome Aboriginal Media Association	13	1991	-	\$3,765,610	\$3,678,976	\$1,523,017	\$48,468	\$2,071,190	\$92,163	\$5,609
Fremantle Arts Centre	14	1973	139,302	-	\$3,275,349	-	\$905,938	\$0	\$48,000	-
Perth Institute of Contemporary Arts	15	1987	272,279	\$2,185,088	\$2,001,049	\$275,822	\$938,659	\$466,149	\$494,509	\$9,949
DADAA	16	1994	11,151	\$2,161,284	\$2,394,549	\$288,854	\$1,812,612	-	\$44,838	\$14,980
ArtSource	17	1991	2,229	\$1,671,946	\$2,030,571	\$1,157,637	\$430,766	\$0	\$70,377	\$13,166
Awesome Arts Australia	18	1973	-	\$1,559,508	\$1,627,593	\$214,879	\$800,543	\$32,000	\$505,955	\$6,129
The Literature Centre	19	1987	-	\$1,557,916	\$1,596,362	\$555,776	\$522,333	-	\$450,675	\$29,131
West Australian Music	20	1994	-	\$1,473,419	\$1,412,603	\$518,158	\$621,118	\$109,833	\$148,859	\$36,951



CEO, Marcus Canning and Festival Director, Amber Hasler have been working together for over a decade. They launched the FRINGE WORLD Festival in 2011 and with a dedicated and dynamic core team have steered the Festivals rapid growth over the last seven years. In this Q&A they seek to address some questions raised in recent years.

Q. Has the Fringe gotten too big?

MC: FRINGE WORLD is one of the 'big four' Fringes alongside Edinburgh, Adelaide and Brighton. Big Fringes deliver big results, not only for the participating artists, but also for the population where they happen, from the audiences through to local businesses. There's nothing quite like the overwhelming wow factor of a Big Fringe taking over a city. It's great. I love that moment on the first weekend of FRINGE WORLD when James Street becomes reamed with all sorts of peeps moving between shows and you know it's Fringe time.

No, I don't think it's too big, but I think it should continue to grow carefully and with consideration.

AH: The Fringe continues to grow so long as there are artists and companies that want to participate and venues that want to host them, so the fact that we continue to get artists returning and new venues putting their hand up every year points to the Festival being a platform that is attractive to artists, which means there's probably a bit more growth to come.

Q. Why doesn't Fringe pay its artists?

AH: Fringe is open-access. It doesn't curate. It doesn't buy shows. It doesn't employ artists, but it does stimulate a lot of artist payments. We were really pleased when we worked out that since the first full Fringe Festival in 2012 - which was the one where we used the empty Treasury buildings before they were developed - we've paid out over \$37 million to artists and arts companies. That's huge, and it's money to artists that wasn't happening in WA before Fringe.

Q. Total spend at box office was marginally lower than last year and average attendance across shows was down 6%. Are you concerned by these results?

AH: It was a tough Festival for many artists and I think everyone felt that the downturn maybe affected sales. That said, when you drill into the results, and not just the averages, you see some shows did better than any previous year and some shows had the worst season ever, with everything in between. There were some independent programs which really failed to attract an audience this year, which meant the artists in those programs didn't have a great time.

MC: The first few years of FRINGE WORLD saw incredible growth. We literally doubled in size each year until we put the brakes on and stabilised. We're still seeing strong repeat attendance and growing new audiences each year but we can always do better. We're very driven to make it the best Fringe it can be. First and foremont that means getting more people to engage.

Q. How do Fringe partners support artists?

MC: Without our partners there wouldn't be Fringe. They back the Festival because they support the artists and they are often coming to us with ideas. The FringeFeed.com.au platform we developed as a new site for Fringe reviews is a good example. One of our longest and strongst partners Woodside backed it and we're in discussions with them about expanding it for next years Festival. Also the Hello Sunshine cider we developed with our brewery partner Gage Roads; You can now buy it in bottle shops and part of every sale goes to the Fringe Fund, which then goes straight into the FRINGE WORLD Awards prize pool. It's ethical cider drinking that helps Fringe artists!

Q. Artists complained that sales were down at the start of this years Fringe compared to previous years. Do you know why?

AH: Simple answer. We opened on the Australia Day Long Weekend. It's been a very long time since we did that and we'd forgotten how bad sales are on that weekend, when half the population is down south or at backyard bbgs and the rest are

distracted by fireworks! It meant the Festival started without the usual Fringe Binge frenzy and it made everyone really anxious, especially us! By the second weekend, the frenzy was on and we sold more tickets on that Saturday than the entire pilot season in 2011. It broke all records and was a big relief, but we'll probably never open Fringe on Australia Day again!

Q. Why do you take a cut of each ticket sold in FRINGE WORLD managed venues?

AH: The box office split covers costs such as technical and front of house staff and equipment, and even the pop-up venue itself. This arrangement works because it means the artist doesn't have to pay any venue hire fee upfront. In Edinburgh Fringe, it's common for venues to hire by the hour and charge penalties if shows run over. Our 32% of each sale is the lowest we can make it to cover the costs of hosting and presenting the show.

MC: It's worth flagging that most of the smaller shows in the Fringe hub venues don't actually cover their overheads even with the box office split. It's essentially the big shows that sell a lot of tickets at Fringe Hubs that subsidise the smaller shows and allow us to keep their cut as low as 32%. Some people complain that big shows don't belong in a Fringe, which personally I find a bit odd. It's the spectrum of shows across the Fringe happening together that makes the magic. If it was similar scale shows featuring similar types of artists it would be an impoverished experience for everyone, particularly the participants. It certainly wouldn't be the FRINGE WORLD that people know and love.

Q. Why doesn't Fringe choose what shows or venues are in the Festival?

AH: Because then it would be a curated Festival and not a Fringe. The beauty of Fringe is anything goes. The type of shows presented at the Festival is driven by the artists and what they want to perform and present. It's wildly democatic and the variety of shows make a smorgasbord opportunity which is a a win win for artists and audiences. You do find beautifully curated programs within the umbrella of Fringe like Blue Room's Summer Nights where everything has been hand selected. One of the great values of Fringe is the huge diversity of works and artists.

Q. Can the registration fees be dropped?

AH: We continue to have some of the cheapest registration fees of any Fringe in the world and the Festival strives to keep all fees and charges as affordable as possible. When you compare what \$300 would get you if you were spending it on regular marketing, the value is pretty sensational.

MC: We also think paying a registration fee is an important means to ensure everyone participating is serious and has given it adequate due thought. If it was free to register it would quite literally be a free for all.

Q. The Fringe has huge ticket sales, shouldn't it get less government support because it's so successful?

MC: Fringe should get more funding, not less. At less than 6% of turnover the contribution to annual expenditure from the state government is modest. That's the lowest comparative percentage of support across the top 10 arts and cultural organizations in WA. Of the other top 10, state government funding peaks at 82% of turnover in one instance with a median of 32%. Compare that to our 6% it's a very small drain on the public purse that achieves incredible visitation and huge impact in the local economy. We deserve more!

AH: And just because the Fringe sells lots of tickets, it doesn't mean it makes huge profits. This idea that Fringe makes heaps of money is entirely false. The 2018 Festival was budgeted to break even and it came out a tiny bit ahead of its targets. Every single bit we make goes straight back in to making it better.

Q. Why did you make FRINGE WORLD a Festival that produces venues and hubs and not a traditional Fringe?

MC: We wanted to get all the best aspects of Fringe from around the world to Perth as fast as possible and decided the best way to do it was to do it ourselves. We were already a producing organisation with a long and proud history of festival and venue production and we were geared to set our Fringe up very differently to others. The first thing we did was get backing from our best mate and founding partner Lotterywest to buy a Spiegeltent in which to house the pilot season and it's been super-phosphate fulled growth rather than organic ever since.



FRINGE WORLD AWARDS

FRINGE WORLD Awards are given to the best shows in each genre category, plus there are a bunch of special awards, with winners receiving cash, development support and direct touring opportunities.

FRINGE WORLD launched the Fringe Fund last year and encouraged the public to add microdonations to their Fringe ticket purchase.

The Fringe Fund helps artists shine through a range of support, development and presentation opportunities including the most generous cash prize pool of any Fringe Festival in the world for award-winning productions. Head to fringefund.org to find out more.

The Martin Sims Award is the top prize of the Festival, recognising the best new Western Australian work in the Festival that is destined to succeed on the world's stage.

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2018 FRINGE WORLD AWARDS



MARTIN SIMS AWARD

The Martin Sims Award is the top prize of the Festival, recognising the best new Western Australian work in the Festival that is destined to succeed on the world's stage.

What Doesn't Kill You (Blah Blah) Stronger presented by Holland St Productions



THE BLAZ AWARD

Presented to the best writing for performance by a WA writer. The Award honours Perth playwright George Blazevich who passed away in 2016.

Winner:

Matt Penny's Find the Lady presented by The Blue Room Theatre Summer Nights & Matt Penny



CABARET AWARD

Presented by Kleenheat

Betty Grumble LOVE ANGER (or Sex Clown Saves the World

AGAIN!) presented by Emma Maye Gibson

WA Winner:

Backdoor Cabaret presented by Perth Cabaret Collective



CHILDREN'S EVENT AWARD

Presented by FRINGE WORLD Festival

Children are Stinky presented by Circus Trick Tease

Mr. Ricochet's Family Circus Show presented by City of Stirling's Summerset Arts Festival & Ricochet Entertainment



CIRCUS AWARD

Presented by MadFish Wines

Winner:

Briefs: Close Encounters presented by Briefs Factory

Lunar Circus presents The Circus Cabaret



© COMEDY AWARD

Presented by Gage Roads Brewing Co,

Winner:

Super Woman Money Program presented by Elizabeth Davie

Luke Bolland - Name Dropper presented by Star Stand-up Comedy



😭 DANCE & PHYSICAL THEATRE AWARD

Presented by K&L Gates

The Honeymoon Suite presented by Bernadeete Lewis



FILM & MULTIMEDIA AWARD

Presented by Channel Nine

12 Films Heart presented by City of Perth in association with



FREE & COMMUNITY AWARD

Presented by Lotterywest

Leedypalooza - Dancin' in the Street presented by Leederville Connect



SINCE 2012

\$221,000

HAS BEEN AWARDED



MUSIC & MUSICALS AWARD

Presented by Nova 93.7

Winner:

Jessie Gordon is Ruining Your Night presented by Jessie



THEATRE AWARD

Presented by ABC Radio Perth

Winner (joint):

ANYMAN presented by Shalom House in conjunction with Fenceline Theatre Company

Artifice with Stuart Lightbody presented by Stuart



VISUAL ARTS AWARD

Presented by FRINGE WORLD Festival

Winner:

making place presented by Annette Nykiel



STREET PERFORMANCE & BUSKERS AWARD

Presented by City of Perth

Winner:

Head First Acrobats



THE WEST AUSTRALIAN ARTS EDITOR AWARD

Presented by The West Australian

A Simple Space presented by Gravity & Other Myths

What Doesn't Kill You (Blah Blah) Stronger presented by Holland St Productions



ECU PERFORMING ARTS AWARD

Presented by Edith Cowan University

WA Youth Theatre Company for yourseven by James Berlyn presented by Perth Institue of Contemporary Arts (PICA) & WA Youth Theatre Company



WA EMERGING ARTIST AWARD

Presented by Woodside

Winner:

WA Youth Theatre Company for yourseven by James Berlyn presented by Perth Institue of Contemporary Arts (PICA) & WA Youth Theatre Company



SPIRIT OF THE FRINGE AWARD

Presented by MRA

Winner (joint):

Intra Herena

Mr Ivan King

INDEPENDENT PROGRAM AWARD

Presented oOh! Media

Winner:

Summer Nights



INDEPENDENT VENUE AWARD

Presented oOh! Media

Winner:

The Blue Room Theatre



MELBOURNE FRINGE TOUR READY AWARD

Presented Melbourne Fringe

Future's Eve presented by Michelle Aitken



ADELAIDE FRINGE TOUR READY AWARD

Presented Adelaide Fringe

Winner:

The Cockburn Incident presented by Lucy & Diane



SYDNEY FRINGE TOUR READY AWARD

Presented Sydney Fringe

How to Period Like a Unicorn presented by Lucy Peach

REPORT METHODOLOGY

FRINGE WORLD has applied consistent impact reportage methodology over the last five years that was developed with BOP Consulting UK - a leading international agency for cultural impact reportage.

The primary source of evidence supporting the findings of this Impact Report are derived from public and participant surveys including:

- Audience survey conducted online that received 5.788 responses;
- Participant survey that received
 523 responses from participating
 artists
- Local business survey (conducted with a target proportion of businesses located near Fringe activity in Northbridge and Perth CBD) that received 45 responses;
- Staff survey that received 78 responses from volunteers and paid staff.

In addition to survey data, there is also significant amount of data collection from additional sources during and post-festival including:

- Transactions made through the FRINGE WORLD Festival ticketing system;
- · Google Analytics;
- · Venue and site reportage;
- Post-event event reports from venue operators including door and external sales and free attendance;
- · Calculated estimates on busker attendance and collections.

The Festival also conducted an intercept survey with targeted businesses located in Northbridge. This had 57 responses.

AUDIENCE CALCULATIONS

The reported figure for attendance at ticketed and non-free events in 2018 is 368,498. This is comprised of:

- 320,863 tickets processed through the FRINGE WORLD ticket system;
- 38,415 tickets purchased on the door at Festival venues including Artist Pass entries;
- 9,220 purchased through other ticketing systems (such as for shows at the State Theatre Centre, His Majesty's Theatre, Heath Ledger Theatre, The Regal Theatre, Subiaco Arts Centre);

The FRINGE WORLD 2018 reported figure of 368,498 attendance at ticketed and non-free events is a 2% increase on FRINGE WORLD 2017 reported figures of 359,987.

The reported figure for total Festival attendance in 2018 is 905,000+, a 19% increase on 2017's figure of 758,000+.

The 905,000+ figure for 2018 includes attendance at ticketed events, attendance at free and busker programs, attendance at the City of Perth FRINGE WORLD Buskers Weekender, attendance at Festival partnership activations and Festival goers enjoying The Pleasure Garden and Festival areas in the Perth Cultural Centre alongside other Fringe hubs.

There were 63 individual free programs and events during Fringe, including the City of Perth FRINGE WORLD Buskers Weekender, Perth Chinese New Year Fair, FRINGE WORLD Mermaids, Birak Concert 2018, Hayao Miyazaki: Studio Ghibli Film Festival, Leedypalooza, visual arts exhibitions, partnership activations and nightly free programs throughout the Perth Cultural Centre and The Pleasure Garden.

There has been an increasing amount of buskers programming in the festival, especially with the introduction of the City of Perth FRINGE WORLD Buskers Weekender this year. As such we have decided to adjust our methodology on how we include estimated attendance and revenue at busker events in our reporting. Where previously it was included under ticketing and non-free events, we are now combining them with free attendance instead as "free and busking event attendance".

Free program attendance is estimated for all relevant programs and events utilising daily site and door staff reportage sheets as well reportage estimates directly from program producers.

The reported figure of 905,000+ total attendance is at the conservative lower end of the projected 905,898 – 975,652 range.



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THE TEAM

The 2018 FRINGE WORLD Festival was created by 3,450 participating artists, 1,017 paid FRINGE WORLD staff (casual, permanent or full time) and 300 volunteers. This does not include staff and volunteers working at the many independent venues and hubs across the festival such as The Blue Room Theatre, PICA and Freo Royale or staff employed by key contractors working on the Festival.

FRINGE WORLD is produced by ARTRAGE. a Not-For-Profit cultural organisation and charity that has been at the forefront of evolving the culture of Perth and WA since 1983.

ARTRAGE BOARD

Chairperson Vice-Chairperson Vice-Chairperson Hon Secretary Hon Treasurer **Board Members**

Lindsay O'Sullivan Kyle Jeavons Gabrielle Vitali Ezra Hefter (commenced May 2018) Saffron Solomon Megan Anwyl **Howard Cearns** Renee Wingfield

Anthony Robinson

Michele Fletcher (retired 2017) Rebecca Tunks (retired 2017) John Goodlad (retired 2017)

Marcus Canning

Amber Hasler

Joanna Hos

Amy Riley

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Chief Executive Festival Director Marketing Director

ADMINISTRATION & FINANCE

Finance Manager Business Systems Manager Office Manager Finance Officer

Administration Coordinator Alexandra Hayes Customer Service Administrator Phoebe Mulcahy

PROGRAMMING Program Manager

Producer **Program Coordinators** Ruth Morris Justin Marshman Alyssia Boyer Amy Greenwood Libby Lynch Anamari Goicoechea

Amir Barber-Skwarko

Lindsay Mulcahy

Melanie Jones

OPERATIONS & FRONT OF HOUSE

Operations Manager Cassandra Jordan Operations Coordinator Mon Wajon Front of House Manager Julia Kazmierczak

PRODUCTION AND TECHNICAL

Production Manager Production Coordinator Site Managers

Warehouse Coordinator

Bec Cooen Nicolas Cates Kieran Diamond Zach Mangan Leigh Walker Nat Nivison Maisie Cottingham

Katie Anne Dixon

Warehouse Assistant Technical Manager Simon Cook Technical Coordinator Katy Fowler

MARKETING & PARTNERSHIPS

Melisa Jasa Marketing Manager Marketing Coordinator Amy Howell Signage Coordinator Kat Wilson Communications Coordinator Rachel Watts Partnerships Coordinator Indi Ranson Fest. Partnerships Coordinator Anna Kouts

BOX OFFICE & TICKETING

Tiffany Creasey Box Office Manager Cheryl Mizzi Senior Box Office Coordinator Box Office Technical Coordinator Nic van Essen Box Office Coordinator Nikita Miedzblocki Ticketing Assistant Elizabeth Jilbert Box Office Assistant Sian Sugars

ROOFTOP MOVIES

ΙT

Program Manager James Taylor Site Manager Lucas Staples Stephen Bellair Venue Supervisors Aidan Girardi

BRAND Studio Papa **BAR OPERATIONS** BarPop **SECURITY NPB** Security **PUBLICITY Buzz Marketing WEBSITE BUILD** Katalyst Interactive **REGISTRATION SYSTEM** (AVR) Artist and Venue

Registration **TICKETING SYSTEM** VIA by RED61 Deltaworks

2018 PARTNERS



Principal Supporte

































Media Partners



















Production and Supply Partners

