

2011 Prague Fringe Festival Audience Survey



An audience enjoying a performance at the 2011 Prague Fringe Festival

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Executive Summary

Having completed its 10th year in 2011, the Prague Fringe Festival (PFF) has grown substantially and received a wide range of accolades for its contribution to the city in terms of diversity, creativity, international reputation (Hollands, 2010), as well as its economic impact (Hollands, 2008; Raabova, 2010).

In 2007, the fringe directors commissioned its first audience survey in order to aid its future organisation, planning and expansion (Hollands, 2008). This 2011 report is designed to follow up on the original survey, with the aim of helping the organizers better understand their complex audience, get feedback on what was said about various aspects of the fringe, and to use the survey results to relay the wider social, economic and cultural benefits of the festival to its varied constituencies.

In total 300 questionnaires were returned resulting in a highly representative sample. Of the total number of respondents, 80% were classified as 'audience only', while 20% were 'audience associated with the fringe' (performers/ writers/ directors/ volunteers, etc) - the latter figure up 5% on the 2007 survey.

The PFF has a diverse and international audience with 44.2% classed as 'Visitors Abroad', 30.4% 'Non-Czech living in Prague' and 25.4% 'Czech'. The Czech audience was up 2.5% from 2007, while 'Visitors Abroad' not associated with the festival were down around 5-6%, despite an increase in tourist numbers in the city in 2011.

Overall 36 nationalities from 70 cities around the world were represented in the PFF audience.

Demographically, the fringe is 'female friendly', and popular amongst students, and young professionals and creative types. Significantly, student as a percentage of the fringe audience rose from 18% in the 2007 survey to 31% in 2011, an increase which is partly explained by a discount in the ticket price for students instituted in 2008.

The survey reveals very high audience satisfaction levels with the PFF. 95% of the audience said their experience of the festival was good, and 99% said they would come back to the fringe if possible.

Not surprisingly, the vast majority of comments made in the audience survey were extremely positive, supportive and encouraging. Comments from performers saying that the festival had transformed their lives and their art, and audience comments about the quality of performance and organisation were abundant.

Constructive criticisms focused almost specifically on marketing, promotion, and publicity relating to the fringe, as well as some suggestions about further discounts for multiple ticket buyers and some social groups (retirees and possibly the unemployed, for example).

Nearly 40% of the audience came especially for the PFF and 37% said that the 2011 festival was not the first one they attended, suggesting that the fringe has a loyal and returning audience, which is important for maintaining sustain tourism in the city.

The main source of information regarding finding out about the festival was still 'word of mouth', but with 58% saying this in 2011 as opposed to 42% in 2007. The internet was the second most frequent method of finding out about the festival (20%), while only 1% said they found out through tourist information sources. In order to increase their audience and boost ticket sales, the PFF needs to adopt a marketing strategy beyond word of mouth, however useful it is in building a loyal audience.

The vast majority of the audience came to the festival with friends and family or with their spouse/ partner, mostly attending in groups of 2-3 people. Targeting larger groups or arts/ educational tours might be a way to boost audience in the future.

55% of the audience planned to see between 2-5 shows, with 14% planning on seeing 10 or more shows during the course of the festival. 78% bought tickets at the venue itself, while 10% bought tickets at the main box office and 10% bought on-line tickets.

87% of the Visitor Abroad audience travelled to the city by air, and extrapolating from the survey results it is estimated that the PFF generated around £45,000 'added value' (money that would not have been spent otherwise) in airfare revenue.

The economic impact of the PFF in terms of bring in new money (added value) to the city of Prague is estimated to be in the region of £5 m CZK. In terms of the grant they receive from Prague City Council, this represents real value for money, with a return of 12.5 CZK into the local economy for every 1 CZK spent supporting the festival.

In conclusion, the report has implications for how the organizers might strategically think about balancing and boosting all of their constituent audiences. In particular, the 'Visitors Abroad' audience who 'did not come especially for the PFF' might be increased by better and more direct marketing through official tourist channels (thought this has financial implications for the fringe), and somehow targeting group tours.

The Czech audience has already been boosted slightly since 2007, and one of the main reasons behind this is that Czech students (including young men) have been attracted through discount tickets (they form 38% of the Czech audience). Cost barriers remain for the older and non-professional Czech residents, and the PFF might consider general discount tickets for the retired and the unemployed.

Future challenges for the PFF include not only better marketing and increasing ticket sales, but also ensuring continued public and considering private sponsorship of the festival.

Background/ Introduction

The Prague Fringe Festival (PFF) was the first of its kind in Eastern Europe, and has now completed its 10th year of operation. Created by two Scots (one based permanently in Prague) and a Geordie, and based loosely on their involvement in and experience of the mother of all fringe festivals, Edinburgh, the PFF has grown from 13 companies performing 63 shows over 5 days in 2001-2, to 39 companies performing 246 shows over 9 days in 2011. Ticket sales corresponding have grown over around 1000% over the last decade. The festival receives extremely positive reviews from the Prague press every year, is supported by Prague City Council (in terms of providing some base funding), and according to an academic study '...there is evidence that the different organisational structure of the PFF helped to produce not only a unique cultural product and experience for festival participants, but that it also aided different kinds of social, cultural and artistic relations and networks between a wide range of people working in theatre and their audiences' (Hollands, 2010: 390).

Despite this growth, scholarly acclaim, and financial support from various quarters, the organizers of the festival realize that there is further room for improvement and various obstacles to overcome for all fringe type events (see Hollands, 2005). First, in a city of festivals, PFF must compete against a range of cultural events for audiences as well as funding/ sponsorship. Second, fringe is a 'relatively' new concept in Eastern Europe and there is an important task convincing audiences and existing/ potential funders of its unique social and economic benefit to the city and its people. For example, the endearing spirit of fringe is to celebrate diversity and encourage international understanding, yet also engage and include audiences, taking into account issues of cost and accessibility. Increasingly, there is also pressure to demonstrate the economic impact of festivals. Third, in relation to this, because the fringe is in some sense an 'imported' cultural phenomenon (delivered largely in English),¹ it has to consider itself in relation to a rather complex set of audiences in the city (Czech's and Non-Czechs living in the city, as well as tourists and those associated with the festival coming from abroad).

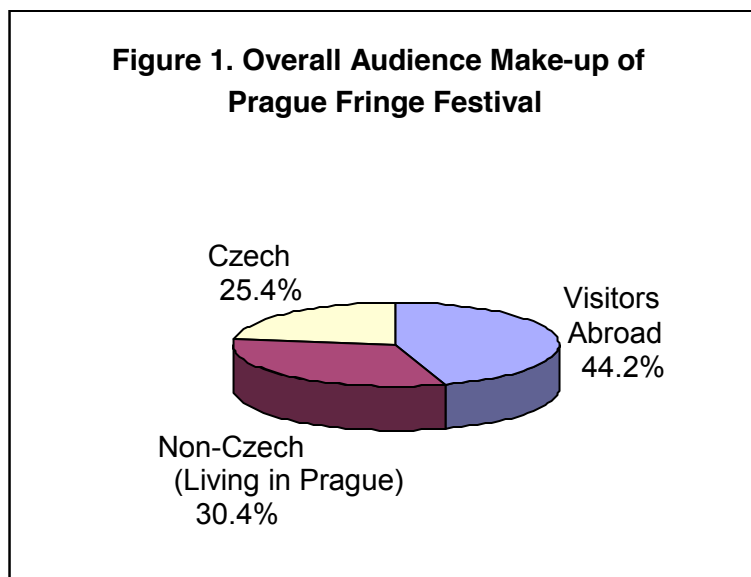
Because of this, the PFF decided to commission its first audience survey during the 2007 festival. The original survey was conducted and overseen by Professor Robert Hollands, a Sociologist from Newcastle University, England, who produced the questionnaire, collated the data and wrote the report that followed (see Hollands, 2008). While the 2007 survey considered the economic impact of the PFF on the city of Prague (also see Raabova, 2010), the report was primarily commissioned to help the organisers better understand who their audience was, and to emphasise the wider social and cultural benefits of the festival in terms of inclusion and engagement. It was decided to do a follow-up PFF audience survey in 2011, ten years on from its inception and four years after the 2007 survey report to see what, if anything, had changed. Like the original survey, the 2011 questionnaire was distributed to audience members at every fringe

venue by front of house staff and collected either prior to and after performances.² In total 300 questionnaires were returned, resulting in a highly representative survey.³ We discuss the results in the pages that follow, making comparisons with the 2007 survey where appropriate.

General Audience Make-up of the PFF

One of the main claims of fringe is its capacity to attract a diverse audience. In fact, located as it is within a very cosmopolitan city, made up of both local and 'ex-pat' communities⁴ and a truly international tourist base,⁵ the PFF is much more an 'international fringe' than say those held in North American (Canada and the US), and Australia, even surpassing the famous Edinburgh fringe in terms of attracting an overseas audience. For instance while 15% of Edinburgh's festival audience is from overseas (SQW Limited and TNS Travel and Tourism, 2005) - the figure for PFF is almost three times this.

In terms of overall audience there are three broad groups represented in our survey. In 2011, 'Visitors Abroad' made up 44.2% of the audience sample, 'Non-Czech Living in Prague' 30.4% and 'Czechs' 25.4%. Overall, these are positive figures as the PFF does not rely predominately on only one type of audience category. While remarkably similar to figures from the 2007 survey, it should be noted that the Czech audience was up around 2.5% which is encouraging, while 'Non-Czech Living in Prague' was down around 1.5% and 'Visitors Abroad' down around 1%.



Furthermore, the overall audience can also be broken down into two further groups - an 'audience associated with the festival' (including performers, directors/ technicians, and fringe volunteer workers), and 'audience only' (not associated with the festival).⁶ In 2011, the former group was 20% of the entire audience, while the latter group made up 80%, which represents a 5% increase in the audience 'associated with the festival' from 2007. In other words, the 2011 fringe depended somewhat more on its own performers and volunteers to make up their audience than in 2007.

The vast majority of the audience group 'associated with the fringe' (87%) can be found within the Visitor Abroad category (only 3% of Czechs and 10% of Non-Czechs living in the city were associated with the fringe). This is due to the fact that the majority of audience 'associated with the fringe' were overseas performers, technicians, directors or volunteers (many coming from the UK). As such, it only really makes sense to sometimes distinguish within the 'Visitor Abroad' category, between those 'associated with the festival' mentioned above, i.e. performers and volunteers (37%, up 10% on 2007 figures) and an 'audience only' category, who are essentially overseas tourists (making up 63% of the Visitor Abroad category).

As a significant and growing percentage of the 'audience associated with the festival' were overseas performers, directors and festival volunteers, this also suggests that the drop in the 'Visitors Abroad' category not associated with the festival (i.e. essentially overseas tourists) was probably more in the order of 5-6%. General figures show that 4.5 million foreign visitors came to Prague in 2011, with the number of overnight stays exceeding record figures for 2006 and 2007 (Burgoine, 2012), so the decrease in overseas tourists attending the fringe does not appear to reflect general tourism trends, an issue we return to in the conclusion.

Further Audience Demographics

The survey asked a number of background/ demographic questions of its audience including their gender, age, occupation and nationality. Below, we generally provide overall figures, occasionally including a further demographic breakdown by audience categories when there are significant differences between our three general categories outlined earlier (i.e. 'Visitors Abroad', 'Non-Czech Living in Prague' and 'Czech').

Table 1

Gender Composition of PFF Audience

	Female	Male
Visitors Abroad	57%	43%
Non-Czech (living in Prague)	52%	48%
Czech	63%	37%
TOTAL AUDIENCE	57%	43%

In terms of gender, 57% of audience respondents were female and 43% male (see Total audience figures in Table 1). This slight gender imbalance is consistent with the gender composition of the 2007 PFF survey and other fringes worldwide (i.e. Arts Management Program, 2002). While females outnumbered males in all three audience categories (see Table 1) the difference was most significant in the ‘Czech’ audience, with women making up 63% of the audience as opposed to 37% males.

A study by Crompton (1997) cites a national attitude survey which shows that Czech men appear less open to new ideas (including how they think about gender roles), as opposed to Czech women, which may form part of the explanation of these findings here. However, it is worth noting that this Czech gender imbalance is far less than the 2007 survey which showed a 79%/21% female male split. This suggests a bit of gender transformation going on here, with male Czech audience figures up 16% in the last four years. Overall, the figures show a 'reasonable' gender balance, with the PFF being obviously 'female friendly'.

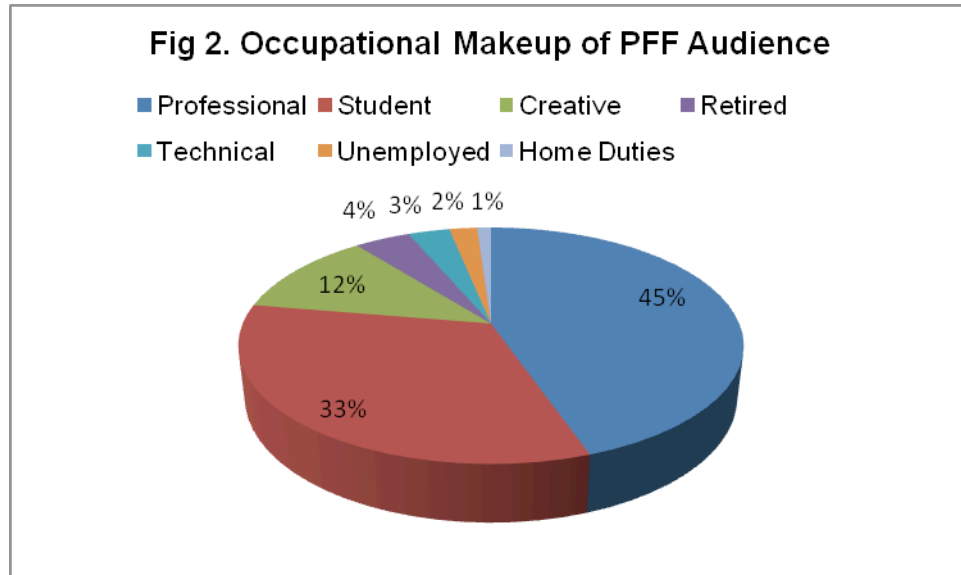
Age-wise, the festival attracts a wide range of people (from under 15 to over 60 years old), but over 2/3rds of its audience is between 15-34 years old. Again, this is fairly consistent with findings from other festivals and fringes, with them being popular with young students, artists and professionals (i.e. SQW Limited and TNS Travel and Tourism, 2005). Least well represented are the under 15s – not surprising perhaps as the PFF does not explicitly provide shows for teens or younger children. While older age-bands are less represented, with only 20% coming from the 45-59 and 60+ groups, these figures are not widely different age-wise than say Edinburgh's festivals (SQW Limited and TNS Travel and Tourism, 2005).

Perhaps a partial explanation of a falling off of the age profile here concerns older Czech's confidence understanding the English language, as a substantial proportion of the PFF programme in 2011 was in English. 87% of the Czech audience is between 15-34 years, while only 13% are above 35 years old, suggesting the fringes' popularity with Czech students and educated young professionals who are more likely to speak and understand English. A good proportion of the Visitor Abroad audience is also young (39% are 15-24 years old), represented by both young fringe performers and volunteers, but as might be expected this audience category also has the highest percentage of 45 to 59 and + 60 year olds, as overseas tourists are more likely to be established adults or retired with reasonable disposable incomes.

Data collected on audience occupation is an important indicator of both diversity and accessibility at fringes. Fringe historically had its roots in celebrating accessibility, yet rising costs and prices at many festivals means that what was once considered to be open to all, is now increasingly becoming beyond the means of certain sections of the population. While some Edinburgh fringe shows command prices of up to £40, average ticket prices in 2011 come in around £9 each (Cornwall, 2011), plus the festival now puts on some free events. So while ticket prices at PFF may look reasonable in comparison for visitors and perhaps Non-Czechs' living in Prague at 150kc (around £5.20 at current rates), unfavourable exchange rates and higher costs in Prague (recently it was rated as the 29th most expensive city in the world), means that ticket prices for some groups, can seem as nearly as expensive. This can, in turn, have an impact on audience demographics.

In terms of the occupation of PFF audiences overall, 42% fell into the category of Professional, 31% Student, 11% Creative, 6% Office, with just 4% of the audience retired, 3% in technical occupations, 2% unemployed and 1% home duties (housewives). At least part of the explanation for the high percentage of Professional workers (from the Visitors Abroad audience especially) may be connected to the link between social class, income and propensity to travel and consume cultural events (MacCannell, 1976), while the relatively high percentage of Creative occupations is explained through the fact the creative people like to consume creative culture (Prentice and Andersen, 2003).

Similarly, not many unemployed people are likely to be traveling abroad to Prague, nor are unemployed Czech's likely to be able to afford a fringe theatre ticket.



However, it should be said that the percentage of the audience from Professional and Creative occupations has fallen somewhat from 2007 by 7% and 8% respectively, while Office workers and the unemployed were up slightly (despite the overall figures remaining small). While comparisons with other fringes around the world prove difficult as studies use different occupational categories and indicators, suffice it to say that while the PFF is fairly consistent with other fringes in terms of accessibility, they could make further improvements here, perhaps in the form of discounted tickets for certain groups.

One of the most significant changes following recommendations made in the 2007 survey was discounted tickets for students introduced in 2008. Consequently, the percentage of Student audiences coming to the fringe has shot up from 18% in 2007 to 31% in 2011. While one needs to consider the fact that student tickets are only 50kc (one-third the normal ticket price, so hence they may be seen as somewhat of a loss leader), it is clear that such a discount has opened up a significant market for the fringe particularly amongst young Czech students. When we look specifically at the Czech audience, 38% were students. While a similar discount for the unemployed and retirees would be unlikely to lead to the same level of audience numbers as students, it would perhaps signal a willingness of the PFF to access these harder to reach groups.

Finally, the survey asked audience members to indicate their nationality. Here the PFF displays that it is a truly international festival in terms of its audience. Overall, 36

different nationalities (from 70 different cities and towns around the world) are represented here in our survey, up from 26 nationalities in 2007. Table 2 shows the highest percentage of audience members by nationality (with the exceptions of Czechs at 25.4%), were English (24%), and Americans (17%), followed by German's (4%), Canadians (4%) and Australians (4%). These nationalities were well represented in both the 'Visitors Abroad' and 'Non-Czech living in Prague' categories. With 16 nationalities represented in the 2011 festival programme in terms of performances, you have a truly international event, in a very international city, with a very international audience.

Table 2

Nationalities Represented in the PFF Audience Survey

American (17%) Australian (4%) Austrian Belgian Bulgarian Canadian (4%) Czech (25%) Dutch English (24%) Estonian Filipino Finnish French German (4%)	Hong Kong Hungarian Irish Israeli Italian Kazakhstan Latvian Macedonian Mexican Moldavian Norwegian Polish Romanian Russian	Scottish Slovak Slovenian Swedish Swiss Ukrainian Uruguayan Venezuelan (36 nationalities in total; % not included unless more than 2% of total audience)
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Attendance Patterns and Knowledge of the PFF

In addition to basic demographic information, the questionnaire also asked a number of questions about attendance patterns and knowledge about the Prague fringe. Firstly, we asked whether it was respondents' first visit to the PFF. While just under 2/3rds replied yes, 37% said no, suggesting that the fringe is building up a small, yet highly loyal audience (note, those saying it wasn't their first festival has risen 10% since 2007). Of the group who said it was not their first time, 33% had come for 2 years, while a further 26% had been coming for 3 years. Five percent of this group (5 people in total) claimed to have come for all 10 years of the PFF.

There were some significant differences in visiting patterns here between our three audience groupings, as well as some differences within groups compared to 2007 figures. For example, as might be expected, 75% of Visitors Abroad had never been to the PFF before (discovering it presumably on their first trip to the city), while only 57% and 52% of Czechs and Non-Czech living in Prague respectively had not attended previously, suggesting that the festival is slowly building up a reputation amongst Czech and non-Czech people residing in the city. There was however, a small cohort of the Visitors Abroad audience who had attended the fringe over a significant number of years either as audience only or audience/ performers. Most significantly however, is that in 2007 83% of Czech's said it was their first time attending, while in 2011 only 57% said this, suggesting that the fringe is beginning to develop a Czech following particularly amongst the young, creative, student cohort. There is also clearly a loyal ex-pat audience in Prague hungry for English language culture. While this loyal audience across categories is heart-warming, much more needs to be done to expand audiences across the board.

Part of this issue is related to PFF marketing strategies, and in terms of this respondents were asked 'How did you find out about the Prague Fringe Festival?' (listing the main source of information only). Overall, knowledge of the festival is still very much a 'word of mouth' phenomenon. In fact, this category has actually increased since 2007 from 42% to 58% despite various attempts by the fringe organisers to market the festival more professionally through other means. For example, 'pop up fringe', which consisted of snippets of acts performing at lunchtime at the fringe club bar Beluchi's was only mentioned by 2% of respondents as their main method of finding out about the fringe. Similarly, 20% mentioned the internet as their main source of finding out about the fringe (promisingly up 7% from 13% in 2007), but only 4% mentioned fringe posters or programmes in cafes (compared to 4% and 9% respectively in 2007).



Figure 3: The Prague fringe festival logo: how well is the festival known in the city?

Surprisingly despite good media coverage of the PFF in the local press, only 2% found out about it through newspaper or magazines (down from 10% in 2007) and only 1% found out through tourist information. Even amongst 'Visitors Abroad' only 2.4% found out about the fringe via 'pop up fringe', and less than 1% via tourist information, with 63% relying on word of mouth. While word of mouth can slowly build a small, yet highly loyal audience, it is clear that the PFF is not reaching the significant numbers of foreign visitors coming to the city each year with information about the existence of the festival. Again, this is an issue for further discussion in the conclusion.

In order to test out whether the audience was getting the 'experiential' concept of fringe (seeing multiple shows in the same day or over a series of days), respondents were asked how many fringe shows they planned to see.⁷ As Table 5 reveals (see TOTAL), the majority of respondents (55%) planned to see 2-5 shows during the course of fringe. Fifteen percent planned to see just one show, 16% planned to see 6-10 shows and a dedicated 14% planned to see 10 or more shows over the course of the 9 days. The average number of shows that the audience planned to see was around 4.5.

Table 3

Number of Shows Audience Members Planned to See at the PFF

	1	2-5	6-10	10+
Visitors Abroad	13%	48%	15%	24%
Non-Czech	11%	57%	22%	10%
Czech	24%	64%	9%	3%
TOTAL	15%	55%	16%	14%

However, there were some significant differences between and within audience categories in terms of numbers of shows they planned to see. As Table 5 shows, Visitors Abroad had the highest percentage of those planning to see 10+ shows with nearly a quarter in this category. However, it is likely that this figure was boosted by those Visitors Abroad who came especially for the festival and those associated with the festival (for example, volunteers associated with the festival are allowed into shows free so cost is not an issue for them specifically).

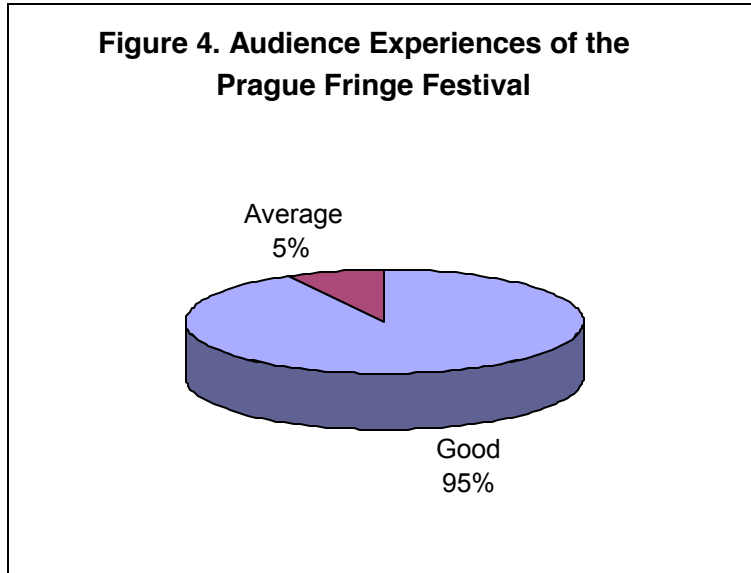
There was also a significant difference between the Non-Czech and Czech audiences living in Prague, with 32% of the former group planning to see 6+ shows, while only 12% of latter planned to do so. 24% of the Czech audience said they planned to see only one show only. Again, this indicates a difference between these two audience groups in Prague, which may be either cultural (not getting the fringe idea of seeing multiple shows in a day) or economic (not being as able to afford to see a range a shows).

We also asked the audience who they came to the festival with and how many were in their party (including themselves). 37% came with friends/ family, while 27% came with their spouse/ partner. A further 17% said they come in a group (not defined by numbers in the party though), 15% came unaccompanied and only 4% came with children (the latter figure again reflecting the fact that the PFF does not cater really for children in terms of the types of shows it puts on). 2/3rd came in a party of two, while another 15% came in a party of 3, while 3% claimed to have come in a party of 10 (likely one of the college theatre companies performing at the fringe, but also going to shows together). Czech's were most likely to come with friends/ family (54%), while Visitors Abroad were most likely to come in groups (29%). Other than that, there were no significant differences in terms of patterns of accompaniment between the different audiences.

The main method of ticket purchase was at the venues themselves (77%), which is in keeping with the spontaneity and accessibility philosophy of fringe theatre, with 10% getting tickets from the main box office (Malostranska Beseda, one of the festival theatre venues) and another 10% from the internet, fairly similar figures to 2007. While there were few significant differences of method of ticket purchase to note within the different audience groupings, Non-Czech's living in Prague were three times more likely than Czechs' to get their tickets online (17% as opposed to 5%).

Audience Views of the PFF

Finally, we sought to measure audience satisfaction with the fringe by asking them to rate their experience as well as indicate whether they would return or not in the future. The results here were overwhelmingly positive, with 95% rated their experience as good, with 5% average and 0% poor (see Figure 3). 87% of Czechs, 100% of Non-Czech Living in Prague and 95% of Visitors Abroad rated their experience as good.



Respondents were also asked if they would attend the PFF again in the future. A resounding 99% of the sample saying either 'yes' (68%) or 'if possible' (31%), indicating a very high level of satisfaction based on audiences wanting to return to the festival again. Such high levels of support again lend evidence to the fact that the PFF has an incredibly loyal fan base both in the city itself and in terms of Visitors Abroad, a fact that they should be applauded for, particularly with respect to the idea of the 'returning' as opposed to the 'passing' tourist (Hollands, 2005).

The survey also contained a comments box for respondents to fill in. While not all comments can be reproduced here, a significant number of responses to the 2011 festival are presented here, grouped into general comments, assessment and quality of the shows, and praise for the festivals level of organization (below, we separately discuss some of the 'constructive criticisms'):

Box 1: Survey Comments About the Prague Fringe Festival 2011

General positive comments:

'I would only come back to Prague for the Prague Fringe Festival as it's a great experience' (Visitor Abroad, associated with the festival)

'This festival has changed my life' (Visitor Abroad, performer/ director)

'We did time our visit to coincide with the Prague Fringe, as it provides an opportunity to see interesting performances in an unique venue' (Visitor Abroad audience)

'Thoroughly enjoy the Prague festival. It is unique, hugely entertaining and friendly' (Visitor Abroad audience)

'This festival has changed my view on the work and art I create for the best. LOVE IT' (Visitor Abroad, technician)

'Prague is a wonderful backdrop to a very special festival. I have enjoyed a range of theatrical experiences at reasonable prices in an eclectic mix of venues' (Visitor Abroad audience)

'The Fringe in Prague has been some of the best artistic experience I've had, hope to keep coming back' (Visitor Abroad, performer)

'Freaky and funny' (Czech audience member)

'Fringe rules!' (Visitor Abroad audience)

'It was wonderful' (Czech audience member)

'Really glad I discovered Prague Fringe' (Visitor Abroad audience)

'We admire the whole thing' (Czech audience member)

'Great fun. A fab event in a special city' (Visitor Abroad audience)

'Will be trying to return, either to work or perform' (Visitor Abroad, fringe volunteer)

'It was cool. Thanks!' (Non-Czech Living in Prague)

'I was impressed' (Czech audience member)

'I really enjoy Fringe Festival. Keep it up' (Non-Czech Living in Prague)

Performances:

'Impressed by the enthusiasm and quality of the performers. Good variety of shows' (Visitor Abroad audience)

'Great diversity of talent and cultural creativity' (Visitor Abroad audience, associated with the festival)

'Gail (performer called the 'Human Jukebox') rules!' (Czech audience member)

'Awesome shows' (Visitor Abroad audience)

'Fantastic shows at a reasonable price' (Visitor Abroad, associated with the festival)

'Always enjoyable. Some excellent shows. Long may it continue' (Non-Czech Living in Prague)

'The actors are great, the 'All In the Timing' (a festival show) is a real belter. Very good first impression' (Non-Czech Living in Prague)

'Great shows' (Visitor Abroad audience)

""Seasons of Liz" (festival show) hilarious' (Visitor Abroad audience)

Festival Organisation:

Thanks to Steven, Carole (festival organisers) and all others' (Non-Czech Living in Prague)

'Technicians helpful' (Visitor Abroad audience, associated with the festival)

'It was well organised and so much fun' (Visitor Abroad audience)

'Helpful staff and volunteers' (Visitor Abroad audience)

'Well organised event' (Visitor Abroad audience)

'People (volunteers/ organisers) are very friendly and helpful' (Visitor Abroad audience, performer)

Particularly gratifying here were comments by performers that the fringe changed their lives and the way they made art, as well as audience quotes citing PFF as 'unique', 'entertaining', 'wonderful' and 'funny'. Furthermore, it was clear from the comments above that the standard of performance at the Fringe is generally viewed by audiences as very high, as is its level of organisation.

The comments box also contained a number of suggestions about improving the festival and we reproduce some of these 'constructive criticism' below in a separate box. These largely were grouped around improving marketing and promotion and considering further ticket discounts, as well as a few miscellaneous comments about venue directions, and the clarity of the festival programme.

The central issue however, raised by both performers and audiences alike, was concerned with publicity and advertising of the fringe and its venues. This is a particularly tricky issue for PFF as it does not have a dedicated marketing person. Furthermore, there are restrictions in Prague regarding posting and flyering and the main tourist office charges for distributing event information, though the cost of this might be considered by the organisers as worth investing in. With around 90,000 foreign tourists coming in Prague each week (many of them flying in), getting promotion materials to even a fraction of this audience at either the airport or tourist information would boost audiences by nearly 100%. Finally, regarding audience comments about a lack of directions and signage of festival venues, the PFF has produced banners in previous years (and did so in 2011), but again there are prohibitive rules in the city which regard this as advertising and potentially chargeable to the fringe.

Box 2: Constructive Criticisms of Prague Fringe 2011

Promotion of the Festival:

'Consider other marketing alternatives. Few people seem to know about Fringe' (Non-Czech Living in Prague)

'It might be worth doing more promotion in Czech language media' (Czech audience member)

'Greater promotion of festival would be great' (Visitor Abroad audience)

'Promotion, promotion, promotion. Is this most important issue for performers' (Visitor Abroad audience, performer)

'A shame no one knows about the festival. Poorly promoted' (Visitor Abroad audience)

'Needs more promotion' (Visitor Abroad audience)

'More posters and interpreters would probably raise the number of visitors' (Czech audience member)

'Advertise in more locations to people not always up to date on events like these' (Non-Czech Living in Prague)

'Could be better publicised' (Non-Czech Living in Prague)

Ticket issues:

'A daily pass - 300kc- would be cost effective' (Non-Czech Living in Prague)

'Festival pass - one price, as many shows as you can attend' (Non-Czech Living in Prague)

'It would be nice if I was able to buy student tickets on-line' (Czech audience member)

'I think there should be a reduced price for over 65' (Visitor Abroad audience)

Misc:

'Some venues hard to find. No sign to the venue on the way' (Visitor Abroad audience)

'The information on programmes on each act is really telling 90% nothing of the show. Demand groups submit better descriptions!' (Non-Czech living in Prague)

A second major theme raised here concerned tickets. Currently, most tickets are either bought on an individual basis at specific theatre venues (which is where most of the audience get their tickets, nearly 80%). Ten percent of the audience bought tickets at the main ticket office (in 2011 Malostranska Beseda, a Ticketstream outlet), where they could get a discount of 5 full tickets for the price of 4 (saving 150kc), and this offer was also available when buying tickets on the internet which another 10% used (in both cases the audience complained about a booking fee by Ticketstream, but this has been rectified this coming festival). However, some audiences mentioned that this could go even further with either a daily discounted ticket (pay a set fee and see as many shows as you could in a day), or better bulk buying deals depending on the number of tickets one bought. A further idea is a full fringe festival pass at a substantial discount to reward loyal audience members. Still others called for discount tickets for retirees, and as was mentioned earlier, discounted tickets for the unemployed might be considered.

Visitors Abroad and Economic Impact

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

Economic impact studies are fraught with methodological problems and are often highly complex using various economic formulas to account for double counting (i.e. money that would have been spent in the city anyway), how to account for with income (including receiving council grants and sponsorship) and expenditure, as well as multiplier effects (influences on sectors outside the arts – say tent hire or the production of tickets etc, or impact on food, drink and accommodation outlets (see Snowball and Autrobus, 2002). Additionally, some studies have argued that there is too much emphasis on economic impact and not enough on social and cultural impact (see Hollands, 2010).

Below we provide a relatively simple and straightforward assessment of the PFF's economic impact on the city, bearing in mind that much the information preceding this section has already highlighted its social and cultural impact (i.e. inclusion, diversity and creativity).

Within the Visitor Abroad audience (around 45% of the total PFF audience), 61% came especially for the festival, while 39% did not (this figure of coming especially for the festival for this audience was up 12% on the 2007 survey figure). This figure is important, first because it shows that there is a 'dedicated' Visitors Abroad fringe audience. But secondly, it importantly demonstrates that nearly 2/3rds of the Visiting Abroad audience would not have come to Prague had it not been for the festival, so this is a real 'value added' figure.

The other 39% who didn't come to Prague for the festival may not have the same added value, though they will have spent money on both tickets and perhaps drinking and eating out in establishments surrounding the fringe venue, and some may have extend their stay in the city because of the PFF. So while they count for less 'added value' (as they were coming to Prague anyway and would have spent money in the city regardless), we can still calculate some economic effect here. When it comes to accounting for local residents spending, the argument is similar - while they would have probably spend money on things other than the fringe anyway, it could also be argued that spending on the PFF may have encourage other spending on food and drink than they might otherwise have spent. In the Adelaide fringe festival 2002 economic impact survey, for example, they still calculate a spend for residents of about 1/3 of that of visitors.



Prague fringe audiences (performers alike) drink, eat, stay in hotels and sightseeing just like regular tourists

Here, however we focus specifically on the Visitors abroad who came especially for the festival in providing a value added calculation (minimum economic impact), while also speculating on further spending of other groups (maximum economic impact). Furthermore, we don't distinguish within the Visitors Abroad group coming specifically for the festival in terms of whether they were an audience associated with the festival or audience only. The reason behind this is that the audience associated with the festival (i.e. performers, directors, technicians and volunteers) provide as much of a economic benefit to the city as normal tourists (i.e. they ate, drank, rented hotel rooms, went sightseeing and consumed as normal tourists, in addition to performing and consuming at the PFF).

Before turning to the festivals economic impact on the city, first, we look at the impact of the PFF on boosting transport (particularly with regard to air travel), In terms of how the Visitors Abroad audience traveled to Prague, overall it's pretty much of a flying culture. 87% percent traveled to the city by air, 9% by train, 2% by bus and 2% by car (presumably those that travelled by other means had flown into other cities in Europe and

then travelled by other means to Prague). Table 6 below shows that Visitors Abroad flew with no less than 19 airlines, with the most popular ones being budget operators such as Jet2.com (25%), Easyjet and Wizzair (11% each), with 5% flying KLM.

Table 4
Main Airlines Flown on by PFF Visitors Abroad Audience

Air Lingus	Air Canada	Air France
BMI	British Airways	Czech Airlines
Delta	Easyjet	El Al
Finnair	Flybe	Jet2.com
KLM	LOT Polish	Lufthansa
Singapore	Swiss Air	United Airlines
Wizz Air		

Extrapolating from our representative survey sample one can roughly calculate the economic impact the PFF has had on creating business for these airlines. Of the 60% of Visitors Abroad that came especially for the PFF (roughly 265 people, based on an extrapolated total audience of 1000), 87% of them flew, spending, as a conservative average, £200 per flight (mixing the popularity of budget airlines with longer overseas flights), gives a total of around £45,000 (or 1.38m CZK) of 'added value' money paid to airlines that they otherwise would not have received. For an airline like Jet2.com which had 24% of this market, at a slightly lower rate of £175 per flight, the Prague Fringe brought them close to £10,000, while Easyjet and Wizzair gained over £4000 each from festival travel.

In terms of calculating the minimum 'added value' (money brought into the city that otherwise wouldn't have been there) of the PFF to the Prague economy, we need to know how many nights Visitor Abroad audiences who have come especially for the PFF spend in the city and how much they spend per day. Overall, the data on the Visitors Abroad audience who came especially for the fringe shows that the average nights stay was 8.7 nights, compared to an average stay of only 6.4 nights for those who hadn't come

especially for the fringe. While both of these figures are above the average tourist stay of 3.9 nights (Hollands, 2005), those who come especially to the fringe were staying over twice as long as the average tourist visit. Visitors Abroad associated with the festival stayed even longer with an average stay of 10.7 days (necessitated by having to be in the city over the course of the festival and also to have rehearsal time).

Average daily spend for Visitors Abroad who came especially to Prague for the fringe spent on average 1707 CZK a day (or around £56) while in the city (including accommodation, food/ drink, transport, tours, money on the fringe, etc). This compares favourably with 2003 figures which suggested that the average tourist spend in the city was around \$61 US or about 1155 CZK (see Hollands, 2005). Within this group however, there was a significant spending difference between those associated with the festival and just audience members, with the former spending only 1341 CZK a day, while the latter spend 2404 CZK a day. Part of this difference can be accounted for by the fact that the latter group was partly made up of the financial position of struggling artists, but also some volunteer workers who have their accommodation costs covered by the festival.

Not surprisingly, the Visitor Abroad audience who had not come especially for the festival spend on average a little more per day over, spending 1800 CZK, but this is not a significant difference compared to Prague festival goers. Given that the Visitors Abroad audience associated with the festival and those who came especially for the festival stayed longer in the city on average, overall they spend more in Prague than the audience that didn't come for the festival.

Extrapolating numbers from our 33% sample survey and utilising the figures calculated above, in the box below we display the minimum 'added value' (money spent in the city that wouldn't have been without the PFF) of the festival to the Prague economy, which comes to over 4 m CZK.

Box 3: Economic Impact of the Prague Fringe Festival

270 Visitors Abroad audience coming especially for the festival x 1707 Kc x 8.7 nights = 4,009,743 kc (minimum 'added value' economic impact)

172 Visitor Abroad who didn't come especially for the festival x 450 CZK for fringe tickets = 77,400 CZK

304 Non-Czech's living in Prague x 600 CZK for fringe tickets = 182,400 CZK

PFF send in the local economy (Czech technicians, equipment, theatre hire, programme and poster printing, etc - 750,000 CZK

TOTAL CONTRIBUTION TO THE PRAGUE ECONOMY: 5 m CZK

However, we can reasonably add some additional sums here. First, we can conservatively add something from those 172 Visitors Abroad who didn't especially come for the festival but attended events. Minimally, this group spent 450k alone on PFF tickets (based on an average of 3 tickets per person at 150 per ticket), and this isn't counting the fact that they may have also had a drink or meal prior to going out to a show or a percentage may have extended their stay due to the PFF). At 450 kc per 172 people this adds another 77,400 CZK to the total above.

Although most formulas of economic impact reject counting local spending (even on tickets, as this is money that would have been spent anyway elsewhere), there is an argument to be made that for the 304 Non-Czech audience living in Prague who attended the festival this wouldn't be the case as they were specifically wanting to consume English-language theatre, and there are few alternatives outside of the PFF to do so. As such it may be permissible to include at least 4 tickets on average (or 600k) for the 30 Non-Czech audience living in Prague (totaling 182,400 kc), raising the economic impact of the PFF up to 4.27m kc. Furthermore if we add the expenditure the PFF spends in the local economy (hiring Czech theatres, equipment and Czech labour, printing posters and programmes etc, (750,000 CZK), the overall total reaches around 5 m CZK being brought into the Prague economy. Based on the funding the PFF receives from Prague City Council (400,000 CZK in 2011), this is a return of 12.5 CZK for every 1 CZK the city invests in the festival, an impressive return indeed.

Conclusions/ discussion points

This 2011 follow up survey has provided a detailed and in-depth analyses of audience make-up, demographics, attendance patterns, and views/ experiences of the PFF. It has also highlighted the significant economic impact the PFF has on the city of Prague. As such it provides a sound basis on which the directors can assess their fringe and consider future organisational changes, trends and/or suggestions raised here. Additionally, it will be of interest to potential funders and sponsors of the PFF. Rather than provide specific

recommendations, the conclusion will instead highlight significant issues that have arisen in the survey, and raise them as discussion points.

First, considering the audience-make up, it is clear that the PFF continues to have a very diverse audience. This is a real positive, not only because diverse audiences are desirable, but also it means that the fringe does not rely on only one type of consumer. Thirty-six nationalities from seventy cities around the world made up the fringe audience making it a truly international event. The PFF is clearly 'female friendly' (though there is a growing male audience, particularly amongst young Czechs), and is highly popular with students, and young professionals and creative types. Its diversity is also reflected in the fact that it draws three significant types of audiences - Czechs, Non-Czech's living in Prague, and Visitors Abroad.

Visitors Abroad is clearly an important segment of PFF audience making up 44% of the total (this compares well with other international festivals like the Edinburgh fringe who attracts 15%). Importantly then the fringe is a draw for bringing in international visitors to the city, especially in terms of attracting those who are associated with the festival (but whom are also an important audience), and those that specifically come to Prague especially to attend the PFF. A significant number of this group had attended multiple fringes (24% had attended at least 6 fringes), showing that there is a small, if not highly loyal international following which will return year after year.

A further segment of the Visitors Abroad category are those not associated with the festival who had not attended PFF previously, who came across the festival while in the city (essentially tourists in Prague for other reasons). It was estimated by the survey that this important audience was more realistically down by 5-6% this year in terms of attending the fringe, despite an upturn in tourist numbers in the city. While this, in itself, is a diverse audience, it is potentially a huge one, and is one the fringe simply has to target more with respect to marketing and advertising. With overseas tourism up in 2011 compared to even good years like 2006, and with around 90,000 foreign visitors coming into to city on average every week, capturing even 1% of this market would nearly double the PFF's audience figures.

The key issue/ problem is how to reach this large and rather diverse audience. One way would be through paying for PFF publicity materials (i.e. festival programmes and flyers) to be made available through official tourist information offices, and the other would be through advertising at the airport, as the vast majority of this potential audience fly into Prague. Both would involve a financial commitment (which may or may not be affordable), and both would involve risking an investment here. But as the critical comments offered in earlier suggest, something drastic needs to be done to raise the profile of the fringe for this audience in particular. Contact with larger groups of tourists visiting the city on educational or arts tours, would also perhaps be a possible strategy.

The festival also has a relatively strong audience of Non-Czechs living in the city of Prague (the so called 'ex-pat' communities as the largest of the two are Americans and the English, although there are other nationalities represented here). Within this audience, there is a relative small, yet highly loyal following, hungry for English-language theatre, many of whom attend the festival every year going to multiple shows, thereby getting the whole point of fringe. Again, this constituency needs to be widened, as figures reveal that foreign nationals make up approximately 6% of the population of Prague, giving a potential audience of over 70,000. Again, even reaching 1% of this audience would raise the PFF audience by a further 75%. While a higher percentage of the Non-Czechs living in Prague group heard about the fringe through the internet and booked their tickets online than either Czechs or Visitors Abroad, more publicity and networking in the ex-pat press and favoured locations (cafes, ex-pat schools, colleges, etc) needs to be done. Because this group tends to be predominately in professional and creative occupations, a greater targeting of professional organizations and businesses and other English-language arts/ creative venues might help boost this section of the audience even more.

Finally, figures show that the Czech audience makes up over 25% of the PFF audience, which is 2.5% up from the 2007 survey. Furthermore, while 83% of Czech's said it was their first festival in 2007, only 57% said that in 2011, which shows a growing loyal audience. However, when the audience make-up figure is compared to the percentage of locals attending say the Edinburgh fringe (where the figure is 33%, with 58% of its audience coming from Scotland), there is still much room for improvement here. The city of Prague contains over a million Czechs, and again, capturing even a small percentage of this audience would place the PFF into another league in terms of festival audiences in the city. Not only is this the single biggest potential audience for the fringe, but based on the fringe philosophy of encouraging diversity and engaging the local population, it is a crucial audience to recruit.

While part of the problem may lie with language issues, as a significant proportion of PFF shows in 2011 were delivered in English, the survey also reveals some other additional reasons why the festival is not as popular as it might be amongst Czechs. For example, the 2011 fringe survey shows while it is particularly popular amongst young, predominately female Czech students, professionals and creatives (though young male interest is growing rapidly), it is least popular amongst older, retired Czech men and female housewives. Students made up 38% of the Czech audience, but as we noted earlier they benefitted from a decision to offer a significant student discount in 2008 following a recommendation made in the 2007 survey. However, with the student market now established, festival organisers may want to consider raising student rates to 50% of the ticket price, or 75 CZK..

The Czech audience overall was also the one most likely to attend only one show (again this might be a combination of language, cost and custom). With the cost of living rising in Prague, and with Czech wages⁸ lower than that of tourists (and probably many 'expats'), PFF ticket prices might appear somewhat dearer to them. While the fringe clearly cannot discriminate in terms of Czech/ non-Czech ticket prices, it might consider the impact discount tickets might have for retirees and the unemployed generally, in addition to its student discount. Finally, it was suggested that marketing needed to be targeted more specifically to Czech areas of the city (outside Prague 1), and to the Czech press, in order to get to the harder to reach sections of the local audience.

The survey also collected information on audience satisfaction, as well as constructive criticism of the fringe. With 95% saying their experience of PFF was good, and 98% saying they would return if possible, the fringe appears incredibly successful in creating a positive experience for its audience. The fact that nearly 40% said they had visited the fringe before, with significant numbers making multiple pilgrimages to the festival, not only is a measure of audience satisfaction, it also provides important evidence of the 'returning tourist', and a more sustainable model of tourism overall for the city.



A satisfied Prague fringe audience: Fringe Sunday 2011

Audience comments about the fringe were incredibly positive and most of the suggestions made were constructive comments rather than criticisms. Particularly noteworthy were comments about how the fringe had changed their lives or art, or why it was the main reason why they kept returning to Prague. Positive comments about the quality and standard of performances and the level of organization should also be welcomed and applauded by the fringe organisers. Overall, the main constructive comments revolved around promotion and marketing issues, and ticket discounts (already discussed), and these are the two key issues that need to be taken up and discussed by the festival directors.

Finally, the survey provided information on the economic impact of the PFF on the city. Overall, it is clear that fringe brings real 'added value' to Prague, bringing in people and money that would not otherwise come to the city. It was estimated here that in addition to around £45,000 generated for various airlines, the fringe brings in around 5 m CZK to the city, which is rough 12.5 CZK for every 1 CZK invested into it by the city, creating very good value for money.

Yet, run a shoe-string budget, with no full-time staff, including no one to do the important marketing and promotion work mentioned, more investment is needed. In addition to more council funding, which would be an excellent investment for the city (but which unfortunately is declining from 400,000 CZK to 300,000 CZK next year), the PFF also desperately needs some base funding through fund-raising or private sponsorship (now common amongst most fringe festivals, though not without its own issues). Recently some sponsorship money has come from Tesco, which is welcomed, but it is probable that city council funding may continue to decline in the future.

There is potential here for the PFF to develop into a major international festival rivaling other festivals in the city and fringes around the world. While this report (and the 2007 survey before it) is an initial step in creating a strategy for further growth by understanding its potential audiences, much more remains to be done in terms of funding and sponsorship. As an academic article suggests, cities such as Prague need more examples of alternative cultural tourism like the PFF, '...if they are to diversify, sustain themselves, and continue to grow creatively and artistically' (Hollands, 2010: 391).

Postscript to the 2011 survey

Ticket sales for the 11th annual Prague Fringe Festival (PFF) held June 1-9, 2012 were up 35% on the previous year, signalling a major turning point for the event in terms of audience numbers and profile in the city. Key to this success were actions on recommendations made in the 2011 audience report, particularly around increased

marketing and better branding of the fringe's identity in a city full of other festivals and cultural events.

With regard to branding, developments here included a completely revamped logo and programme design, as well as a new-look website (see <http://www.praguefringe.com/en/>). With regards to improved marketing, the PFF benefited from a very successful 1st year partnership with My Narodni department store who provided financial support as well as assisting with promotion via an additional 3000 programmes, 150,000 leaflets, a high profile window display at the prominent city centre location, and an in-store ticket competition for My Narodni customers. Additionally, a dedicated Street Team was formed for the first time, whereby volunteer staff took to the streets of Prague to promote the festival to the city's many tourists and visitors. Money was also spent this year on securing 5 prominently located posters in the main airport, and PFF leaflets were distributed to visitors at the Prague Airport arrivals lounge. In conjunction with Prague 1, poster boards of the fringe outside the main venues, also ensured that the festival has a strong visual presence in the city. Finally, the PFF was strongly represented in the Czech, expat and international press including daily blog posts on lifestyle website protisedi.cz and a daily review column in Divadelni Noviny. Reviews were also posted on English language sites including expats.cz, praguepost.com and prague.tv. For the first time reviews were also included on the international fringe review website fringereview.com and a British student site newcurrent.com, and 2012 saw the launch of Fringe TV, a daily video report filmed on site at the festival and hosted on the Fringe website. It's 5 episodes featured interviews with performers, feedback from audience members and tips and advice from festival assistants and provided an entertaining visual insight into the event.

2012 also saw the second year of collaboration with the Malostranske beseda venue, including the creation of a purpose-built venue 'Beseda Galerie' in the attractive and atmospheric attic space. The very popular 'Fringe Club' was hosted in the Beseda main bar for the first time this year and provided a space for artists, audience members and volunteers to meet and socialise. Overall, better branding and recognition of the PFF, increased marketing strategies and the development of new collaborations with both sponsors of the festival and new exciting venues, bodes well for the continuing success of the fringe in the years to come..

Notes

1. A breakdown of the 2011 programme showed that the PFF included companies from 16 different countries. Despite this, the majority of shows in 2011 were delivered in English, which is an issue for non-English speaking Czechs.
2. Thanks goes to the festival organisers, Steven Gove, Carole Wears and Giles Burton for helping to facilitate the conduct of the survey. A special thanks goes to all the front of house staff who administered and collected the surveys and to Carole Gove and Siobhan Lightfoot for keeping track of them all for me. Also thanks to my son Joe Carr-Hollands for mastering SPSS17 and helping me input and analyse the data.
3. The total number of tickets sold combined with the non-paying audience (complimentary tickets to special guests and volunteers) totaled approximately 4500 in 2011. With the average number of shows seen around 4.5, this gives a real audience total of 1000, a figure we use when we extrapolate to calculate economic impact on the city economy. Hence our survey sample of 300 questionnaires is 33% of the total audience, making it highly representative.
4. While the term 'ex-pat' is often used to refer to particular communities residing in Prague (usually English and Americans, two of the largest and longstanding groups), due to increase movement of populations to the Czech Republic since them joining the EU, we prefer to use the term 'Non-Czech living in Prague' in this survey to indicate that this group is broader than the two nations mentioned above. However, we recognise the importance of these two significant groups.
5. For instance, Tourism in the Czech Republic is the second most lucrative industry in the country, contributing 11% to the country's GDP, and accounting for more than 10 percent of total employment in the country. Prague, the capital, accounts for 75% of all total foreign tourists in the Czech Republic (see Hollands, 2005).
6. It is important to note here that due to the nature and philosophy of fringe, the audience traditionally includes other performers and volunteer workers associated with the festival, who mutually supporting one another by attending each others shows. Hence they are an important segment of the audience and are included in this survey.

7. While this question may not represent exactly how many shows they actually did see (and how many tickets they bought), we had to ask the question in this way as questionnaires were handed out from opening to closing day of the festival. We take answers here however as a rough approximation of how many shows people did actually see.
8. The average monthly wage in Prague in 2007 was 23,137 CZK (or £625) (source: <http://magistrat.praha-mesto.cz>).

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