

# PERTH FESTIVAL

## 2020 REPORT

Founder



Principal Partner



Report prepared by



***Perth Festival acknowledges the Noongar people who remain the spiritual and cultural birdiyangara of this kwobidak boodjar. We honour and respect the significant role they play for our community and our Festival to flourish.***

This report has been prepared by Kristine Genovese, Jack Midalia, Jordan Gibbs and Shannon Pearse of Culture Counts™. We would like to thank Perth Festival for their support through the development and delivery of the evaluation project. We would also like to thank all stakeholders including public patrons, artists, participants, volunteers and staff for their participation in this project.

Date of Preparation: May 2020

# Contents

<b>Perth Festival 2020 Evaluation</b>	<b>2</b>
Welcome	2
<b>At a Glance</b>	<b>4</b>
<b>Audience Profile</b>	<b>7</b>
<b>Evaluation Summary</b>	<b>10</b>
<b>Program Outcomes</b>	<b>13</b>
Festival Overview	14
Highway to Hell	16
Performance & Free Program	18
Case Study: Opening Week of First Nations Performances	20
Chevron Lighthouse	22
Literature & Ideas Weekend	24
Lotterywest Films	26
Event Impact Showcase	28
2018 - 2020 Festival Comparison	30
<b>Community Engagement</b>	<b>35</b>
Sector Development Activities	38
Artists and Arts Organisations	39
Creative Learning & Partner Schools Programs	40
Partners and Donors	41
<b>Economic Impact</b>	<b>43</b>
Economic Impact Assessment	45
Tourism Impact Summary	50

# Perth Festival 2020 Evaluation

***Perth Festival acknowledges the Noongar people who remain the spiritual and cultural birdiyngara of this kwobidak boodjar. We honour and respect the significant role they play for our community and our Festival to flourish.***

## Welcome

Until recently, it would have been very difficult to imagine a world without art and culture. Now, we know for sure what a barren existence that would be.

Art is more than an essential service. It defines us as humans. Cultural expression has comforted us, entertained us and connected us during our extended house-bound exile from one another because of the coronavirus pandemic.

We are social creatures and we love gathering to connect in creative and life-affirming ways. How difficult it is to have that snatched away.

As Perth Festival 2020 Literature and Ideas guest Benjamin Law wrote so beautifully recently, people turn to art in times of crisis. 'Staying indoors and washing our hands will help us survive, protecting the arts will help us live.'

Films, books, podcasts, streamed theatre and music, binged TV dramas, virtual art gallery tours - their writers, directors, visual artists, performers, designers and technicians have been our welcome companions in our long hours of need.

We have been reminded that we all have the urge to create and share. There is no divide between artist and audience. The social-media stream of virtual choirs, balcony soliloquies and lounge-Zoom dance challenges is proof of that.

Our physical isolation has been the ultimate stress test of art's public value. That value has shone through to us like a beacon of optimism and promise in foggy, uncertain times.

Rarely is that value better expressed than at a festival that celebrates our instinct to meet up, make and share art together and rejoice in our common humanity.

We then feel at home.

Perth Festival 2020 was a momentous celebration of what home means, a state of belonging as much as a sense of place here on Noongar Boodjar. The first of Artistic Director Iain Grandage's four Festivals was a welcoming campfire for sharing stories and making art together.

This Perth Festival 2020 Impact Report, compiled by Culture Counts, uses robust, internationally recognised metrics to assess the Festival's profound positive impact on life in Western Australia.

It combines ticketing data with extensive research led by Culture Counts, including 5,435 surveys of audiences, artists, arts workers, teachers, students, Festival partners, staff and volunteers.

The report measures the Festival's artistic quality, demographic reach, creative industry development and our social, cultural, civic and economic impact on the WA community.

Festival 2020 was a success on every level. Key social and cultural impact scores increased from last year, rating highly in terms of the Festival's value to the State, local impact and sense of place, community belonging, distinctiveness, excellence and authenticity.

Ticket sales were at a record high of \$6 million, even with the cancellation of the final three weeks of the Lotterywest Films season due to COVID-19. Of our 413,076 total attendances, 23% of our audience were experiencing the Festival for the first time. Many of them were among the 144,850 people who brought three weeks of festivities to a rapturous close at *Highway to Hell*.

Public support for the Festival is the lifeblood of our existence. In 2020, 97% of respondents said the Festival plays an important role in our State's cultural life and 95% said it delivers high-quality experiences for the people of WA. Some 93% said it was important that the Festival supports the local creative sector through its Festival Connect community development and creative learning initiatives. More than three-quarters of the 2,286 participating artists this year were from WA and the Festival paid \$10.8 million into their hands and to local suppliers and workers.

Festival 2020 was a destination event for locals and tourist alike. More than half (52%) of our out-of-State visitors said it was one factor in them being in Perth at Festival time and 28% said it was the main reason they had come to WA at all. Tourists added \$6.1 million to the WA economy through the Festival.

In presenting this report, we thank all our audiences, sponsors and donors, artists and participating companies and co-presenters. Your insights, investment and continuing support will shape the Festival for the future and improve our contribution to the community.

Celebrating 67 years as Australia's longest-running, annual curated arts event, Perth Festival's success in tandem with Fringe World proudly confirms Perth as one of the world's great festival cities.

Perth Festival was founded by the University of Western Australia, in the wave of economic and social renewal after World War II. Now, more than at any time since then, we can be at the forefront of recovery efforts for the social, cultural and economic health of the WA community.

More than ever, we must continue to be a Festival for the people of WA.

We certainly can't wait for the opportunity to get together as a community once again for Festival 2021. See you then!

**Nathan Bennett**  
**Executive Director**



# At a Glance

## AUDIENCE

**413,087**

Total Attendance\*  
\* Includes co-presentations

**144,850** 

Highway to Hell  
Free event

**172,546** 

Performance & Free Program

**25,608** 

Chevron Lighthouse

**14,849** 

Literature and Ideas

**55,234** 

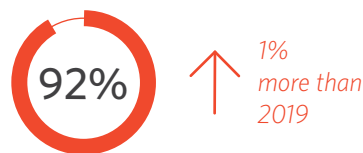
Lotterywest Films

### Net Promoter Score



An NPS of 50 is considered to be excellent, this score shows a fantastic level of customer loyalty

### Overall Experience



Surveyed attendees rated their Perth Festival 2020 experience as 'Good' or 'Excellent'

### First-time Attendees



The proportion of attendees that attended a Perth Festival event for the first time in 2020

## BOX OFFICE

**\$5.98 million**

Spent at the Box Office\*  
11% more than 2019 ↑

**134,966** 

Tickets Sold\*  
\* Includes co-presentations

**\$32.77** 

Average Ticket Price

## PROGRAM

**207** 

Events

**1,074** 

Performances

**10** 

Works commissioned or co-commissioned by Perth Festival

**12** World Premieres 

**7** Australian Premieres 

**30** WA Premieres 

## ARTISTS

**2,286** 

Artists

**77%** 

Local

**17%** 

Interstate

**7%** 

Overseas

## SECTOR

**602** 

Staff

**233** 

Volunteers

**229** 

Industry Passes

## MARKETING

**24,400** 

Instagram Followers  
as of March 2020

**61,800** 

Facebook Likes  
as of March 2020

**65,500** 

Twitter Followers  
as of March 2020

**37,451** 

E-news Subscribership  
as of March 2020

**537,509** 

Website Users  
From November 2019 - March 2020

25% more than 2019 

**904,538** 

Website Sessions  
From November 2019 - March 2020

**97%** 

Respondents feel positive about  
Perth Festival (Brand Affinity)

**29 countries** 

Reached through media  
coverage

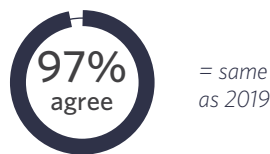
**16** 

Visiting national and  
international media

## BRAND OUTCOMES



Perth Festival's voice,  
character and identity  
is grounded in Perth



Perth Festival plays an  
important role in the  
cultural life of the State



Perth Festival delivers high  
quality cultural experiences  
for the people of WA

## ECONOMIC IMPACT

**\$54** 

Attendee Average Spend  
(Per visit, excluding ticket price)

**\$30.3 million** 

Direct Expenditure

60% more than 2019 

**\$84.7 million**

Multiplied Economic Impact

## TOURISM

**17,240** 

Festival visits by interstate and  
overseas attendees

**8.7** 

Average nights

**28%** 

Tourists came to Perth  
mainly for the Festival

**\$11.0 million** 

Total Direct Tourism Expenditure

8% more than 2019 

**\$6.1 million** 

Total Direct Tourism Impact

4% more than 2019 

Dom Mariani and the Tommyhawks at Highway to Hell, photo by Tashi Hall





# Audience Profile

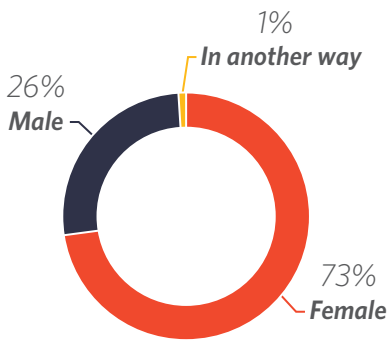
Over 413,000 attendees flocked to Perth Festival events in 2020, with many coming from outside of Perth to join in the festivities. Survey results show that 9% of the audience was from elsewhere in Western Australia, interstate or overseas, up from 7% in 2019.

The diverse program attracted non-traditional arts attendees, with 38% of respondents indicating that they only attend cultural events four or less times per year.

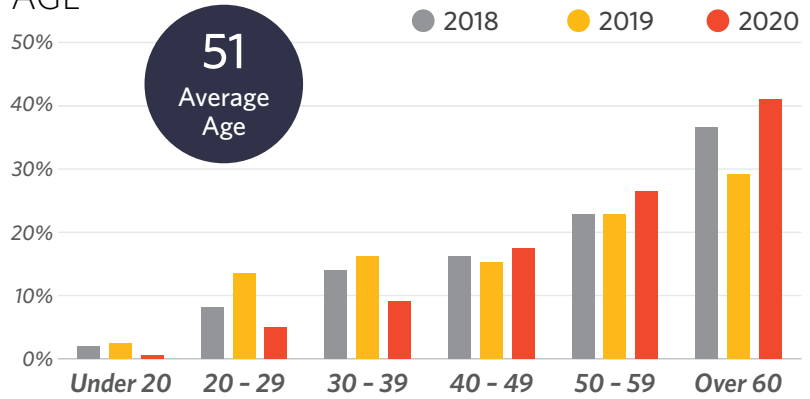
The average age of attendees across all Festival programs was 51 and almost half of respondents (47%) classified themselves as professionals, the next largest cohort were retired (21%).



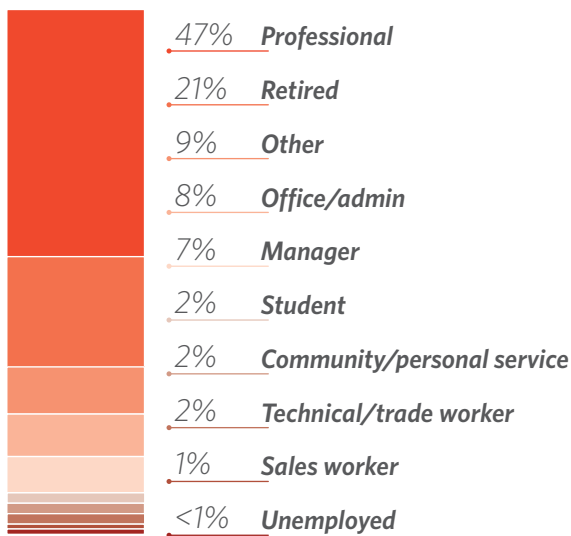
## GENDER



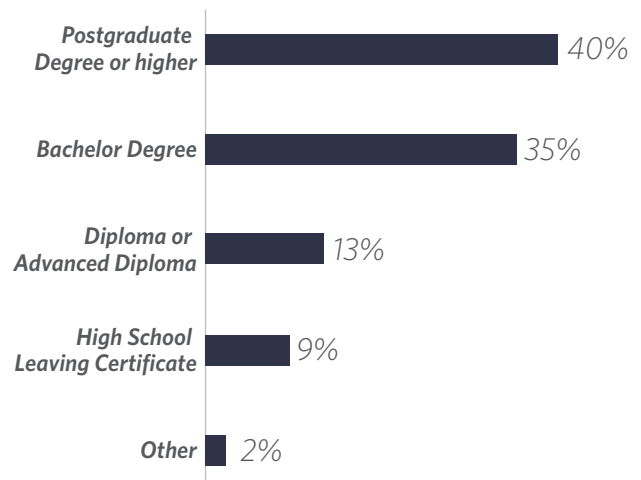
## AGE



## OCCUPATION

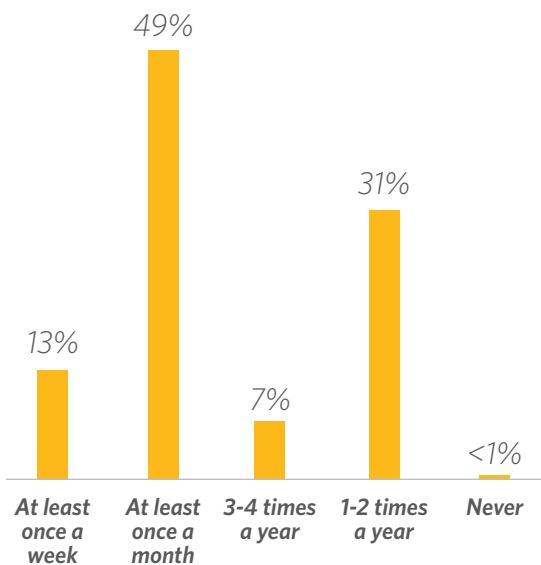


## EDUCATION

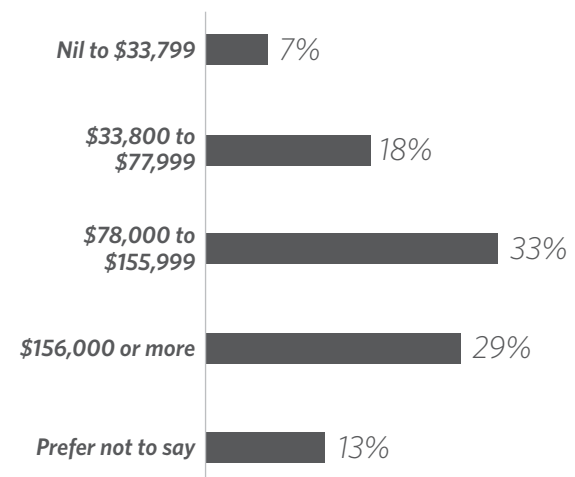


## FREQUENCY OF CULTURAL ATTENDANCE

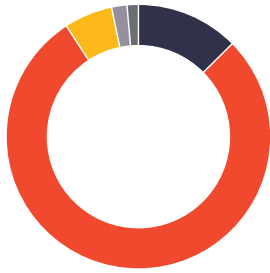
How frequently do you attend arts and cultural events or activities?



## INCOME



## LOCATION

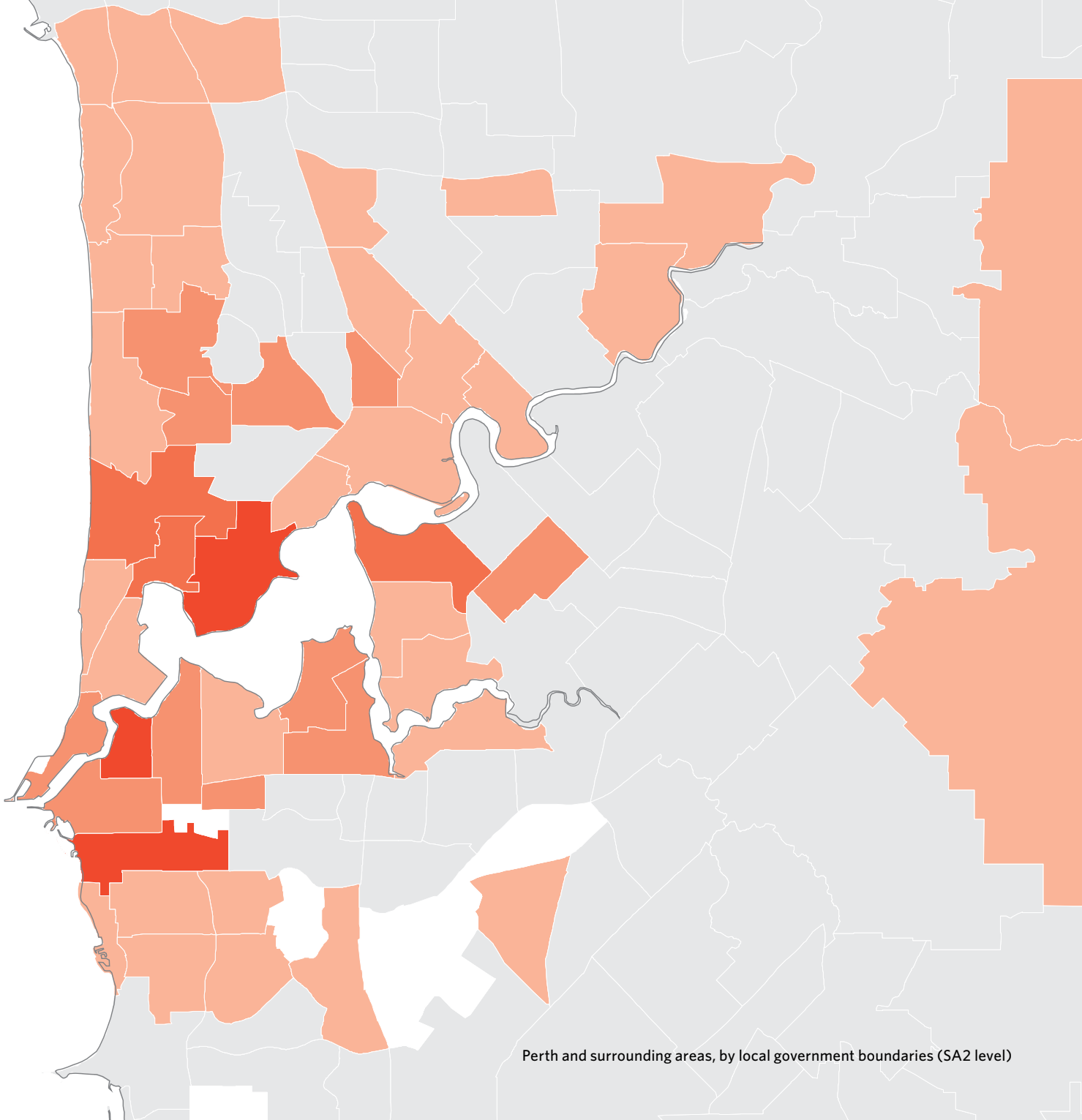
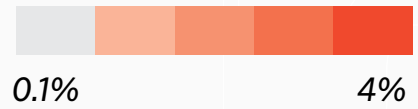


- 13% **City of Perth**
- 78% **Perth Metro Area**
- 6% **Elsewhere in WA**
- 2% **Interstate**
- 1% **Overseas**

## POSTCODES

1. *Subiaco (6008)*
2. *Claremont (6010)*
3. *Hamilton Hill (6163)*
4. *Nedlands (6009)*
5. *Mount Lawley (6050)*
6. *Floreat (6014)*
7. *Fremantle (6160)*
8. *South Fremantle (6162)*
9. *Bicton (6157)*
10. *Applecross (6153)*

## SURVEY RESPONDENT PLACE OF RESIDENCE



## Evaluation Summary

Perth Festival uses an evaluation framework, applied by Culture Counts, to measure and understand the unique impact achieved by the Festival. Impact is about understanding how action creates change.

The framework uses a standardised set of metrics called 'dimensions' to measure the quality and impact of arts and culture. They have been developed through extensive work with the sector, internationally tested and academically validated.

Each Perth Festival 2020 survey contained a core set of dimensions, asking respondents about their experience attending a Perth Festival event and their overall perceptions of the Festival. Survey respondents moved a slider to indicate the extent to which they agreed or disagreed with the dimension statement.

These dimensions were selected in alignment with the goals identified in Perth Festival's Strategic Plan 2018 - 2022:

- **Excellence:** Curate a diverse artistic program of the highest international quality
- **Advocacy:** Contribute to a strong cultural ecology
- **Identity:** Be remarkable, with a clear voice and character
- **Sustainability:** Secure the future

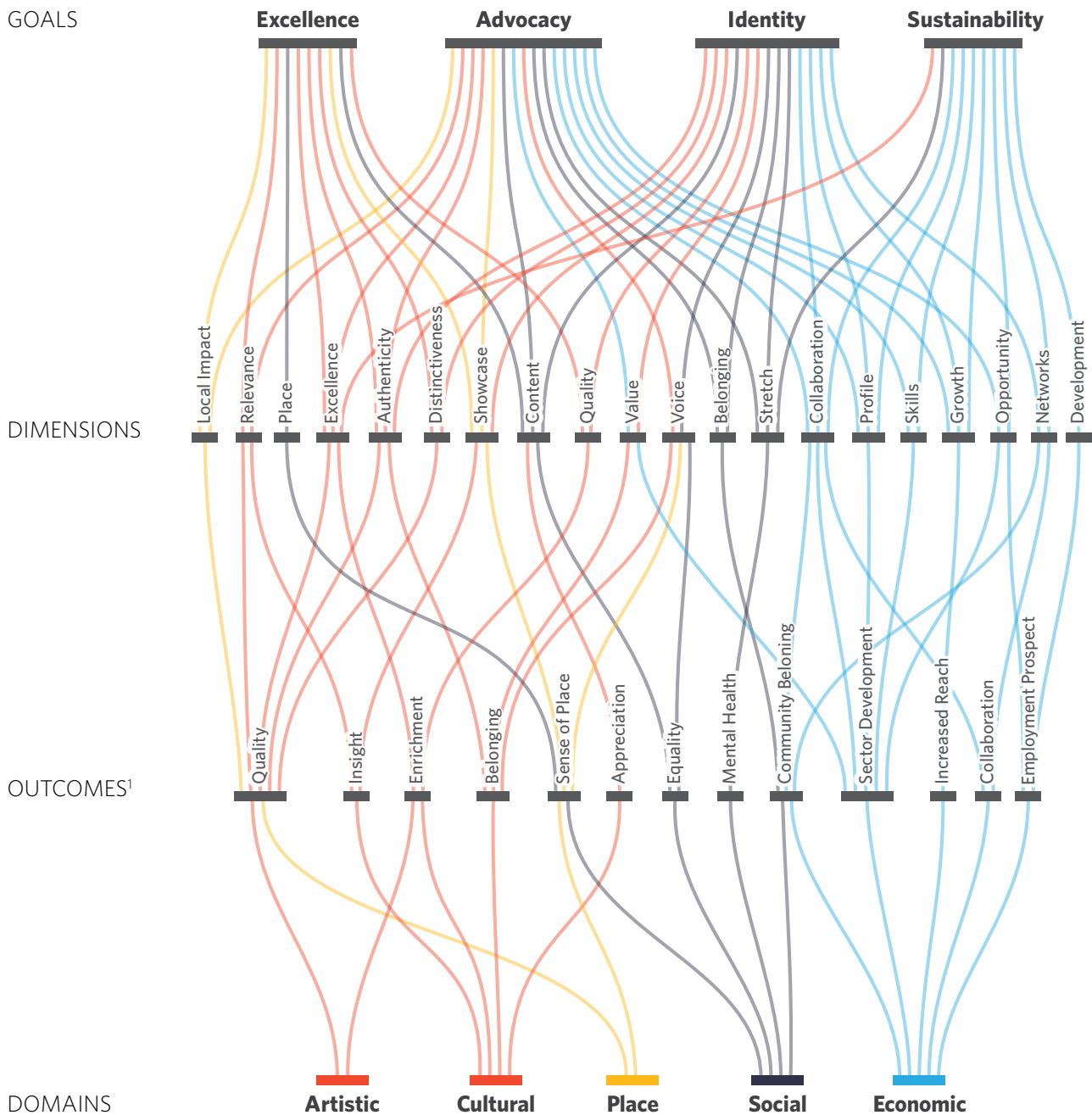
Dimension results contribute to the realisation of outcomes and illustrating their unique impact. By linking the outcome domains back to our goals, we can see the pathway between Perth Festival's strategic intentions, their realisation and impact.

DOMAIN	DIMENSION
Artistic & Cultural	<b>Distinctiveness:</b> It was different to things I've experienced before
	<b>Excellence:</b> It is one of the best examples of its type that I have seen
	<b>Authenticity:</b> It had a connection to the State/Country that we live in
	<b>Relevance:</b> It had something to say about today's world
	<b>Voice:</b> <sup>1</sup> Perth Festival's voice, character and identity is grounded in Perth
	<b>Value:</b> <sup>1</sup> Perth Festival plays an important role in the cultural life of this State
Social	<b>Quality:</b> <sup>1</sup> Perth Festival delivers high quality cultural experiences for the people of WA
	<b>Place:</b> It made me feel proud of my local area
	<b>Belonging:</b> It helped me feel part of the community
Place	<b>Content:</b> It reflected a broad and inclusive range of voices
	<b>Stretch:</b> <sup>2</sup> I did something I didn't know I was capable of
Economic	<b>Local Impact:</b> It's important that it's happening in Perth
	<b>Showcase:</b> It showcases Perth's arts and cultural depth
	<b>Opportunity:</b> <sup>2</sup> It opened up new opportunities for me
	<b>Skills:</b> <sup>2</sup> It helped me develop new and existing skills and gain experience
	<b>Development:</b> <sup>2</sup> It contributed to the development of my creative practice
	<b>Collaboration:</b> <sup>2</sup> It enabled me to collaborate with others
	<b>Networks:</b> <sup>2</sup> It connected me with other people in my field
<b>Profile:</b> <sup>2</sup> It helped raise my profile	
	<b>Growth:</b> <sup>2</sup> It appealed to new audiences

<sup>1</sup> Applied to Perth Festival as a whole, rather than per show.

<sup>2</sup> Applied to Community Engagement programs only.

## Outcomes Alignment



**Artistic:** Connects the quality of what we produce, the realisation of our intentions and the strength of our impact.

**Cultural:** The aspect of life in which human beings' values are enacted, which are the things we care about and the ways we share them.

**Social:** Supports a society that creates and promotes participation in community life and fosters the realisation of self within the individual.

**Place:** Recognises the links between ourselves and where we live, contributing to our overall wellbeing.

**Economic:** Promotes dynamic and resilient local economies that are required to sustain vibrant communities.

1 Adapted framework based on the Cultural Development Network's Measurable Outcomes model: [culturaldevelopment.net.au/outcomes](http://culturaldevelopment.net.au/outcomes)



# Program Outcomes

Artistic Director Iain Grandage's inaugural Perth Festival program was a glorious summer celebration of people and place, presented through a wonderfully vast range of events. The 2020 Festival theme was Karla - a Noongar term meaning fire and by extension, country and home.

Festival 2020 saw over 200 events across theatre, music, dance, opera, film, visual arts and literature and ideas and dazzled audiences from near and far.

The Festival kicked-off with a week of First Nations performances, celebrating Australia's unique voice. The free epic closing event - *Highway to Hell* - honoured local Western Australian legend Bon Scott of AC/DC fame with a tribute party that spread over 10 kilometres of Canning Highway.

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*"Perth Festival's artistic director Iain Grandage has delivered a quite remarkable triumph that bodes well for festivals to come."*

Victoria Laurie, The Australian

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## Festival Overview

For the purpose of this report, Perth Festival's key programming streams have been assessed individually, and benchmarked against aggregate Festival averages. The program evaluation aims to identify any differences measured across audience demographics and recognise the unique impact that each program delivers.

The subsequent pages outline the distinctive outcomes achieved by the Festival's performance and free program, Chevron Lighthouse contemporary music program, the Literature and Ideas events, Lotterywest Films and Perth Festival 2020's large-scale free event *Highway to Hell*. The report includes a case study that looks at the unique outcomes of the Festival's opening weekend of First Nation programming. Program outcomes are displayed alongside four key Patron Experience metrics - Overall Experience, New Audience, Net Promoter Score and Average Spend.

This is the third year that Perth Festival has used Culture Counts methodology to evaluate the Festival's impact. From page 29, the 2018, 2019 and 2020 Festival comparison identifies the strengths of each program and any changes in perception over the years.

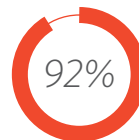
PROGRAM	ATTENDANCE
Performance and Free Program <sup>1</sup>	172,546
Chevron Lighthouse	25,608
Literature and Ideas	14,849
Lotterywest Films <sup>2</sup>	55,234
Highway to Hell	144,850
<b>Total Attendance</b>	<b>413,087</b>

<sup>1</sup> Includes attendance from all visual arts events, co-presentations (*Ballet at the Quarry, Bran Nue Dae, Cloudstreet, Fidelio, Garrick Ohlsson, Hecate, Hofesh in the Yard, Koorlangka, Single Origin, The Business of Being a Writer* and *The Necks*) and other free events, (*Opera in the Park, Language of our Country* and *Chamber Music Weekend*).

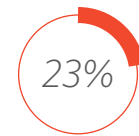
<sup>2</sup> Includes attendance from the *Claremont Quarter Film Screenings*.

## PATRON EXPERIENCE

Overall Experience  
(% Good/Excellent)



New Audience  
(% Attended program  
for the first time in 2020)



Net Promoter Score



Attendee Average Spend  
(Per visit, ex. ticket price)

**\$54**

### Overall Experience

All surveyed audience members were asked to rate their overall Perth Festival experience, based on the ticket purchasing process, event experience and atmosphere. Responses were split into five measures - very poor, poor, average, very good and excellent.

### New Audience

The new audience percentage shows the proportion of people that visited a Perth Festival program for the first time. This number highlights Perth Festival's new audience reach and is also a good indication of loyalty from repeat audience members.

### Net Promoter Score (NPS)

NPS is a standardised metric that measures the loyalty between an organisation and its audience, based on their likelihood to recommend to a friend or colleague. An NPS that is positive (above 0) is generally considered to be good, with an NPS of 50+ considered to be excellent.

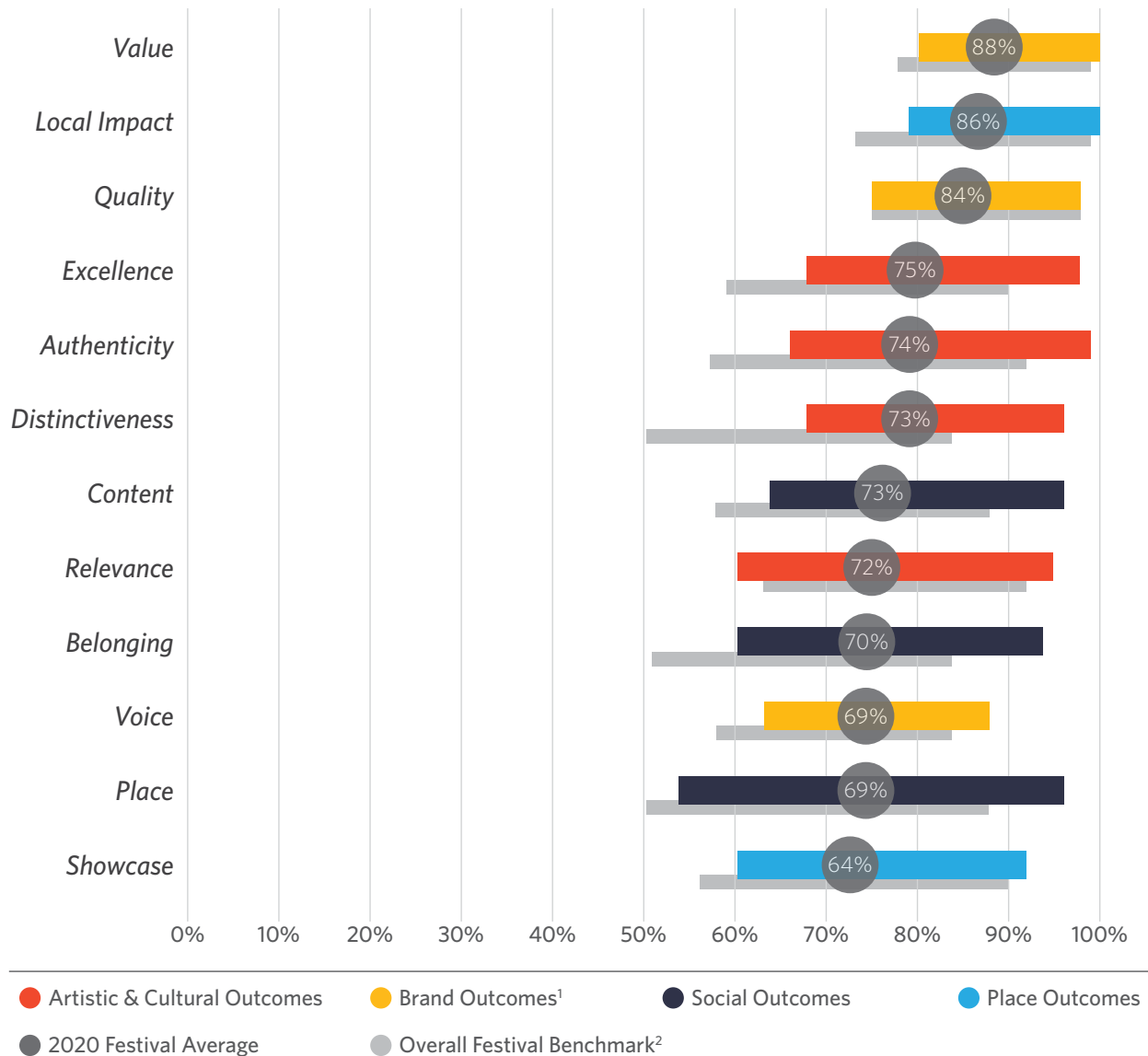
### Attendee Average Spend

People were asked how much they spent during their trip to Perth Festival, both inside and outside the venue. This figure gives an insight into audience behaviour at the event, and how this might differ for different programs and venues.



## OVERALL PERTH FESTIVAL 2020 OUTCOMES

Including Festival Benchmarks



Benchmarks provide context by illustrating the unique impact delivered through Perth Festival 2020, compared to the legacy of outcomes achieved previously. In this instance, the benchmarks have been derived from data captured throughout the Perth Festival 2018 and 2019 seasons.

Small interquartile ranges demonstrate that responses were similar and therefore, a consistent outcome has been achieved across all respondents. Larger ranges indicate more divergence. This divergence is to be expected, as Perth Festival offers a wide and diverse program each year and the variety of experiences available each have different intentions and strengths.

This comparison shows that the Brand dimensions continue to perform strongly and that audiences are united in their appreciation of Perth Festival as a whole.

The Artistic and Cultural metrics shone in 2020, with the benchmarks illustrating the positive increase in results, particularly for the 'Excellence', 'Authenticity' and 'Distinctiveness' dimensions.

<sup>1</sup> Highlighted as 'Brand' outcomes for the purpose of clarity.

<sup>2</sup> Benchmarks are based on data captured from Perth Festival 2018 and 2019.

# HIGHWAY TO HELL



Highway to Hell, photo by Jessica Wyld

In 2020, Perth Festival's free community event, *Highway to Hell*, closed out the Festival on Sunday 1 March.

The unprecedented event saw 10 kilometres of Canning Highway close for a musical spectacular – an ode to AC/DC and Bon Scott, who is fabled to have written the famous song about this stretch of the highway which he regularly travelled.

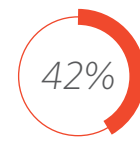
Over 140,000 people from Perth and beyond joined in on the celebrations, with activities and performances across four key zones, and a parade of eight flat-bed trucks moving bands, belting out AC/DC inspired rock.

## PATRON EXPERIENCE

Overall Experience  
(% Good/Excellent)



New Audience  
(% Attended program  
for the first time in 2020)



Net Promoter Score



Attendee Average Spend  
(Per visit, ex. ticket price)

**\$42**

## HIGHWAY TO HELL TRADER IMPACT

**\$6.1 million**

Highway to Hell Direct  
Economic Impact

**99%**

Average Sunday trade  
increase

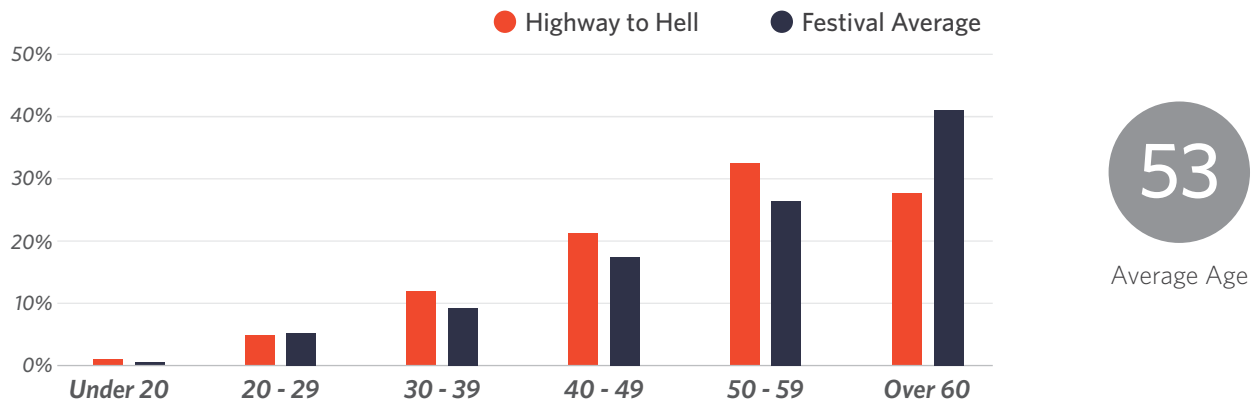


Of local businesses  
were in favour of  
the event

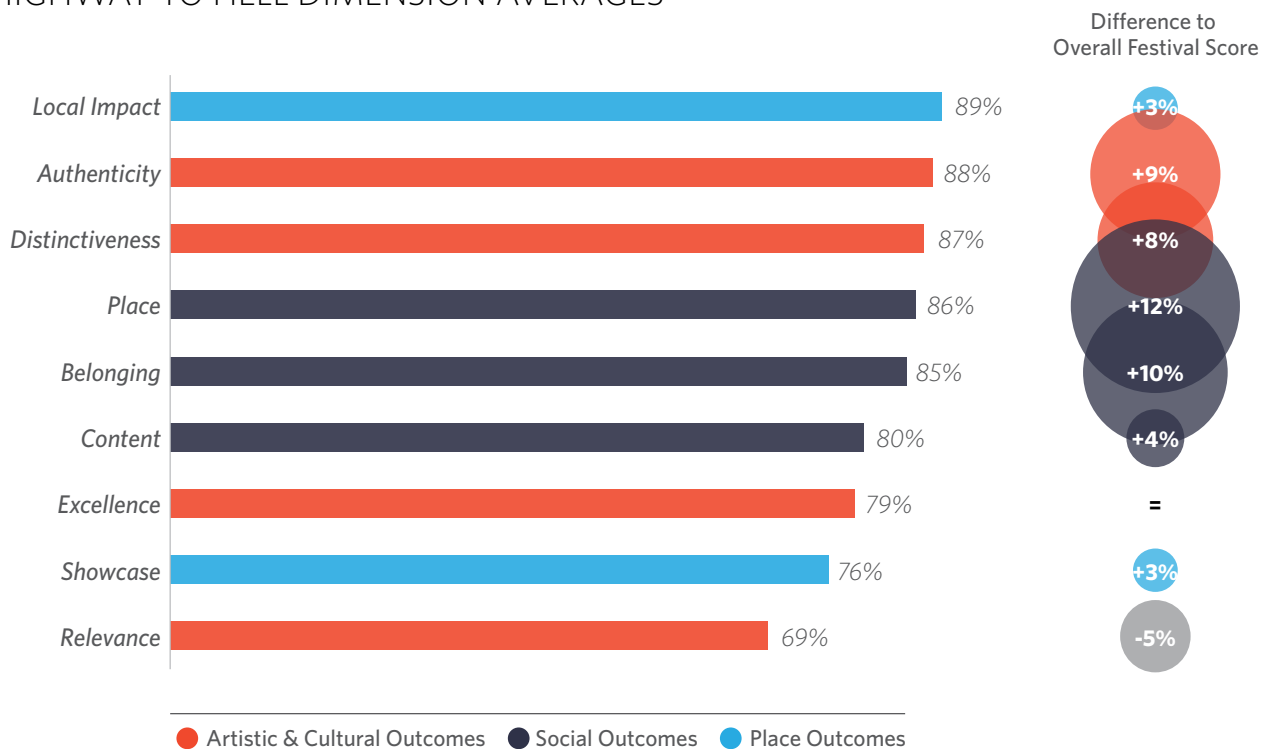
*"Great event! Dealing with (Perth Festival) all the way through was an absolute breeze. Thanks so much for bringing people back to Canning Highway!"*

Local Business Survey Respondent

## AUDIENCE AGE PROFILE



## HIGHWAY TO HELL DIMENSION AVERAGES



*Highway to Hell* excelled in achieving social impact, with the audience strongly agreeing that the event helped them to feel part of the community, that it reflected a broad and inclusive range of voices and made them feel proud of their local area. From a cultural standpoint, respondents also acknowledged the event’s strong connection to the State/Country we live in. The event was hugely successful in reaching a new audience, with almost half of the people surveyed at *Highway to Hell* indicating that they had never attended a Perth Festival event before.

*Highway to Hell* had a significant impact on local businesses, generating \$6.1 million Direct Economic Impact. On average, surveyed local businesses showed that business almost doubled on the day of the event compared to a normal Sunday.

# PERFORMANCE & FREE PROGRAM



Leviathan, photo by Sergio Lordao

Perth Festival's performance and free program embraced an ever expanding orbit of stories from the local to the global, with new Artistic Director Iain Grandage describing the Festival as, "a campfire for sharing stories and inviting belonging."

Including theatre, music, dance, opera and visual arts events, the program has become renowned for bringing together unique and meaningful stories from all corners of the world, and our own backyard.

A Case Study on Page 20 outlines the unique outcomes and impact achieved by the Festival's opening week of First Nations performances.

## PATRON EXPERIENCE

Overall Experience  
(% Good/Excellent)



Net Promoter Score



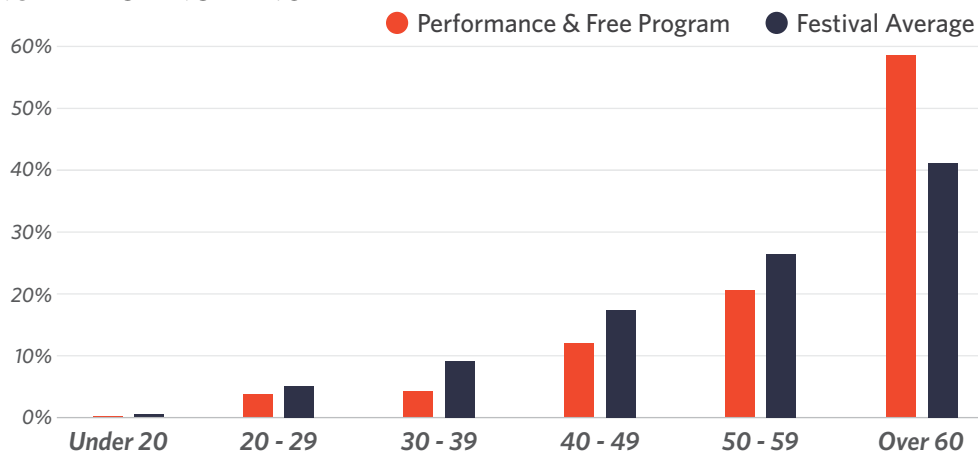
New Audience  
(% Attended program  
for the first time in 2020)



Attendee Average Spend  
(Per visit, ex. ticket price)

**\$64**

## AUDIENCE AGE PROFILE

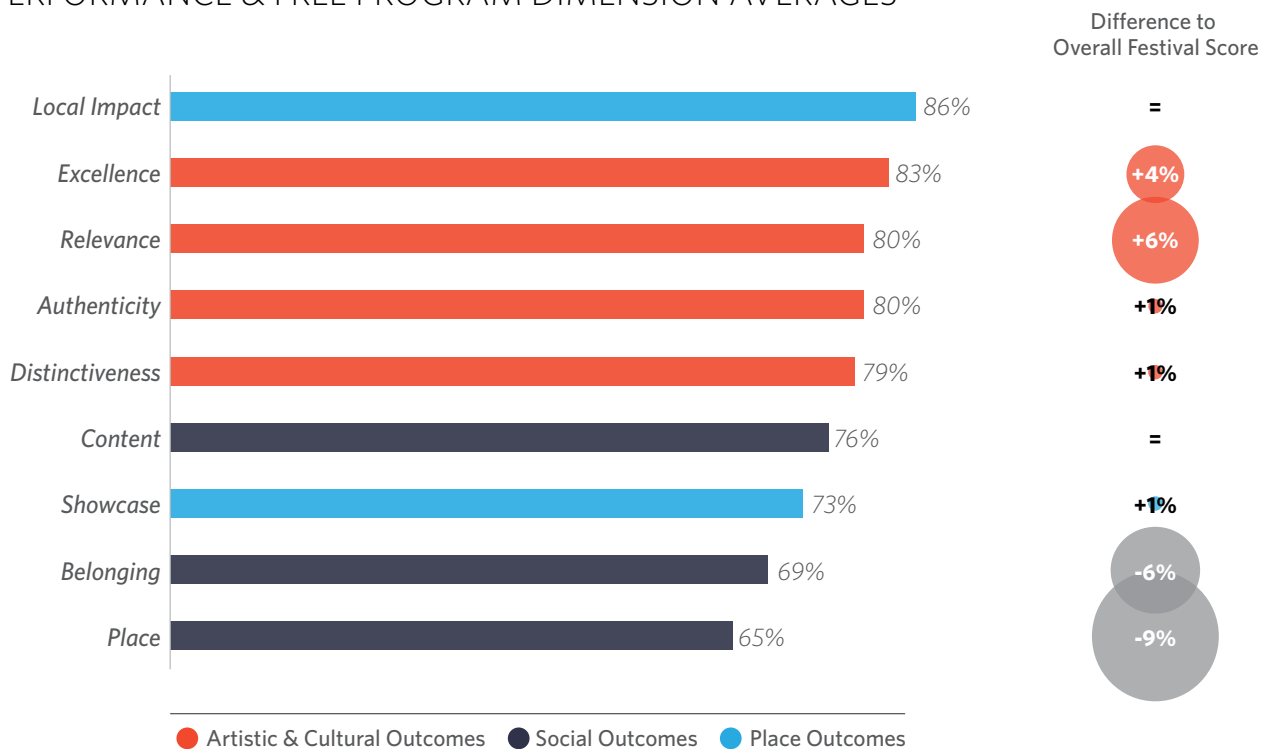


62

Average Age

↑ +5 years from 2019

## PERFORMANCE & FREE PROGRAM DIMENSION AVERAGES



Perth Festival’s performance and free program achieved a strong Net Promoter Score, demonstrating strong loyalty from the Festival audience, the majority of which had been to a Festival event in previous years.

Audiences were most likely to agree that it’s important Perth Festival is happening here. The program achieved strong outcome scores in the artistic and cultural domain, with performance and free program audiences agreeing the events were some of the best of their type that they’d seen and the program had something to say about today’s world.

# CASE STUDY: OPENING WEEK OF FIRST NATIONS PERFORMANCES



*Bungul*, photo by Toni Wilkinson

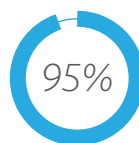
In a first for any major Australian international arts festival, Perth Festival 2020 dedicated its entire first week to First Nations Performances, celebrating Australia's unique voice in the world.

In a landmark event, the program included the all-Noongar language *Hecate*, the ravishingly beautiful *Bennelong* and the wedding rom-com *Black Ties*. It also saw the return of the first indigenous musical *Bran Nue Dae* and the world-premiere season of *Bungul*, which invited audiences into the culture that inspired Gurrumul's final album, *Djarrimirri*.

At the new new Chevron Lighthouse, hip hop powerhouse Briggs, all-female choir Spinifex Gum and nu-souls star Ngaiire helped open the venue with a bang and over at Somerville Auditorium, Lotterywest Films hosted the must-see Australian documentary, *In My Blood it Runs*.

## PATRON EXPERIENCE

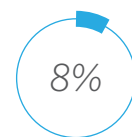
Overall Experience  
(% Good/Excellent)



Net Promoter Score



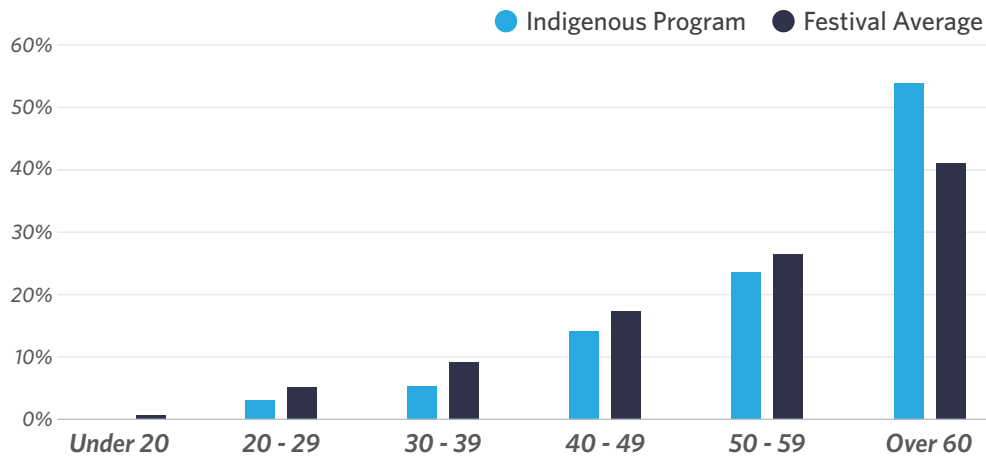
New Audience  
(% Attended program  
for the first time in 2020)



Attendee Average Spend  
(Per visit, ex. ticket price)

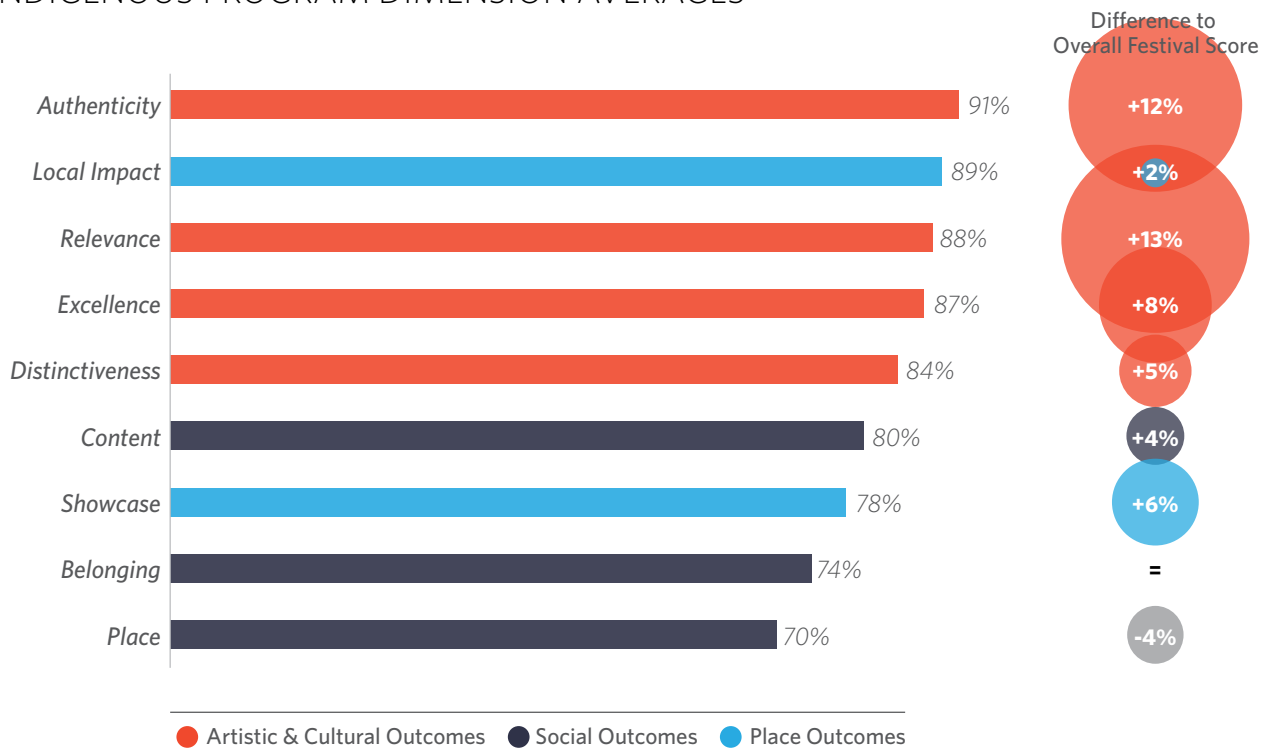
**\$47**

## AUDIENCE AGE PROFILE



60  
Average Age

## INDIGENOUS PROGRAM DIMENSION AVERAGES



The Festival's opening week received exceptional results for its artistic and cultural metrics.

Audiences that went to these shows strongly agreed that the events had a connection to the State/Country they live in and had something to say about today's world. The results for these dimensions demonstrate the true and significant cultural impact that these works had on the audiences that experienced them.

# CHEVRON LIGHTHOUSE



Rolling Blackouts Coastal Fever, photo by Cam Campbell

The Festival's popular contemporary music venue took a new form in 2020, moving to the Perth Concert Hall and offering audiences a brand new experience.

As always, the program showcased diverse and interesting musical talent including multiple Grammy award-winners Blind Boys of Alabama, performance poet Kate Tempest, New Orleans marching outfit Treme Brass Band, indie charmer Weyes Blood and the hugely popular Aldous Harding. The Chevron Lighthouse came to an epic finale on 1 March with gospel legend Mavis Staples.

## PATRON EXPERIENCE

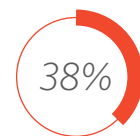
Overall Experience  
(% Good/Excellent)



Net Promoter Score



New Audience  
(% Attended program  
for the first time in 2020)

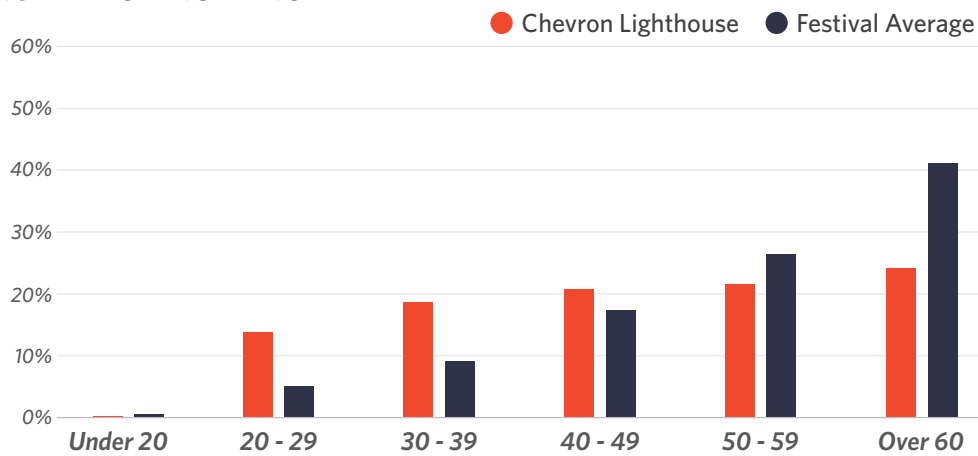


Attendee Average Spend  
(Per visit, ex. ticket price)

**\$67**



## AUDIENCE AGE PROFILE

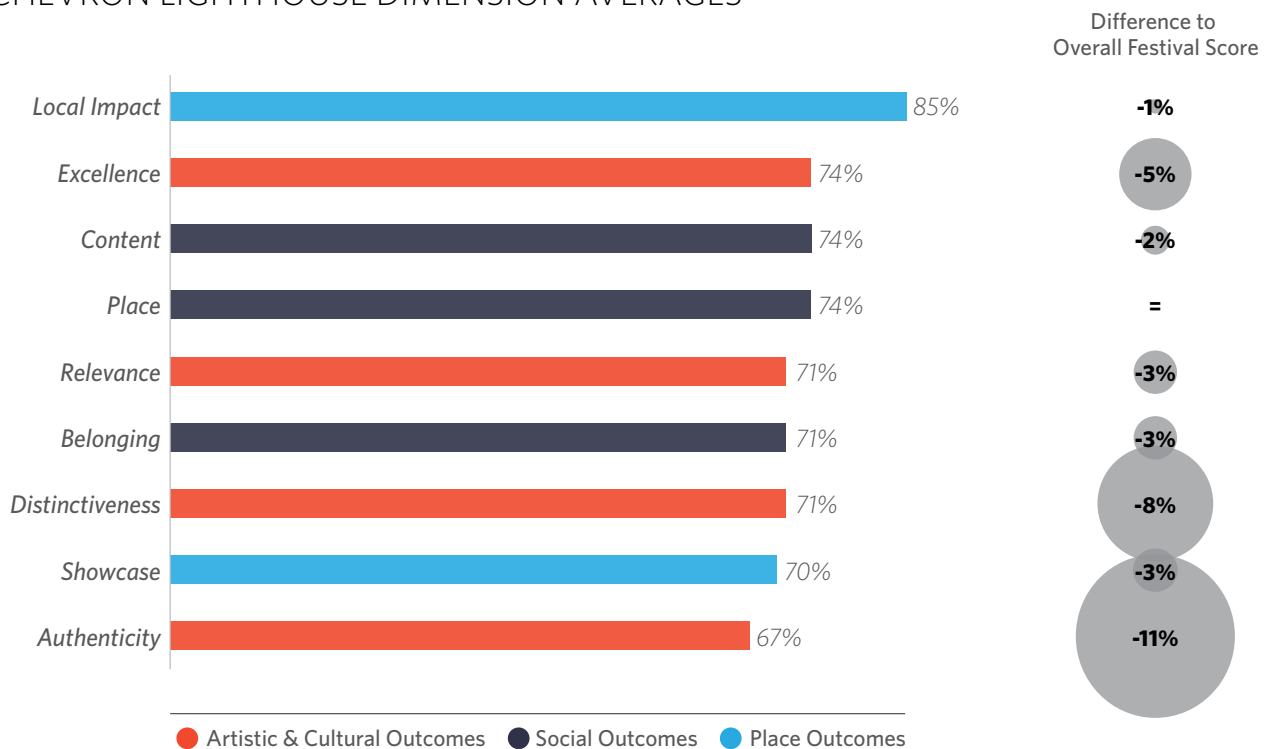


48

Average Age

↑ +6 years from 2019

## CHEVRON LIGHTHOUSE DIMENSION AVERAGES



The Chevron Lighthouse program attracted a large proportion of new audience, with over one third of attendees attending the program for the first time in 2020. Attendees enjoyed the food and drinks on offer, spending on average \$67 each on their night out to Chevron Lighthouse.

The ages of the Chevron Lighthouse audience are more evenly distributed across age groups, with higher representation from people aged between 20 and 49.

Respondents were most likely to agree that it's important the events are happening here, they are some of the best of their type that they'd seen and the program reflected a broad and inclusive range of voices.

# LITERATURE & IDEAS WEEKEND



Literature & Ideas Weekend, photo by Jessica Wyld

Land. Money. Power. Sex. These four big themes drove Perth Festival's 2020 Literature & Ideas program curated for the first time by Sisonke Msimang.

Novelists, songwriters, filmmakers, politicians, artists, DJs and comedians came together to wrestle with the most pressing issues of our time in a program packed with all the things that matter. The program included superstar writer Neil Gaiman, the award-winning author of *Sandman*, who shared his stories during a captivating afternoon event at Perth Concert Hall.

*Lit Crawl Perth* showcased local talents in venues in popular hubs around the city, mobile book club *A Bus, a Book & A Bite* took to the streets and the ever-popular *Family Day* and weekend hub were hosted at The University of Western Australia.

## PATRON EXPERIENCE

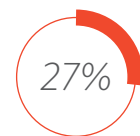
Overall Experience  
(% Good/Excellent)



Net Promoter Score



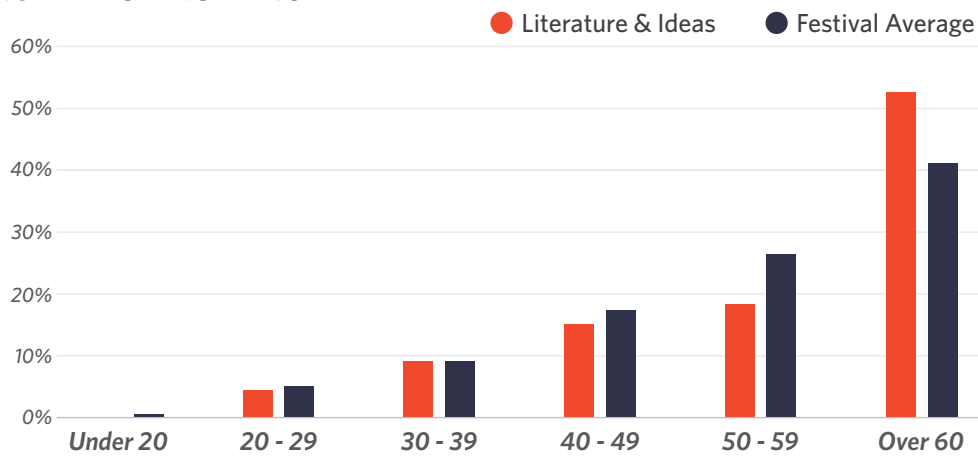
New Audience  
(% Attended program  
for the first time in 2020)



Attendee Average Spend  
(Per visit, ex. ticket price)

**\$65**

## AUDIENCE AGE PROFILE

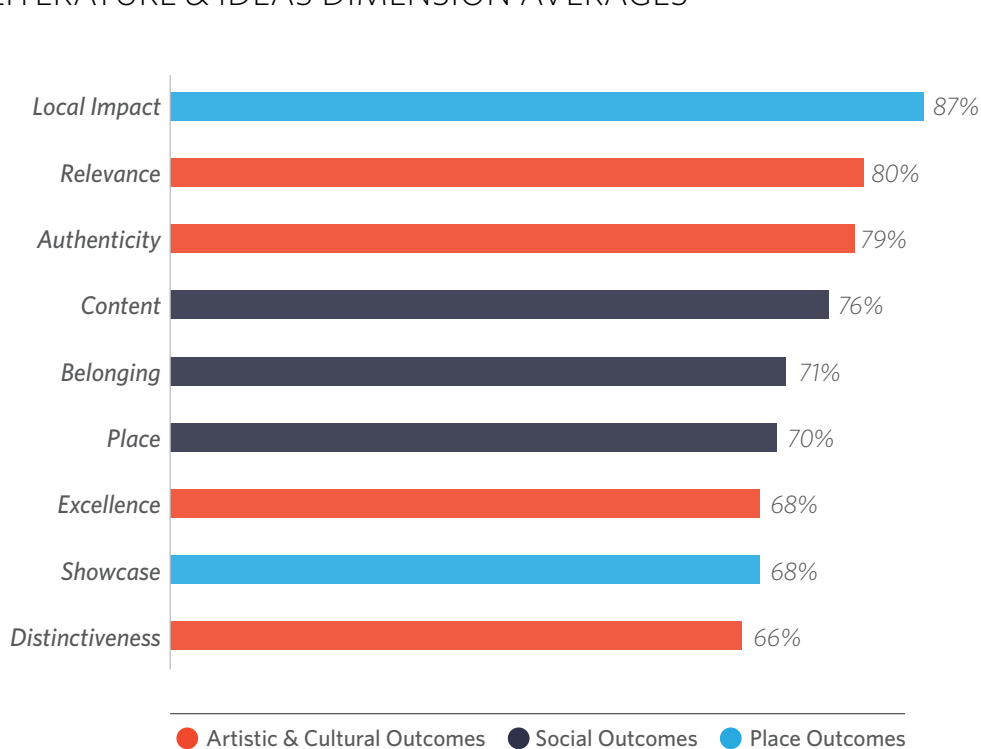


61

Average Age

↑ +3 years from 2019

## LITERATURE & IDEAS DIMENSION AVERAGES



Difference to Overall Festival Score

+1%

+6%

=

=

-4%

-4%

-11%

-4%

-12%

Overall, attendees had a very positive experience at the Literature & Ideas events, with 92% rating their experience as good or excellent. Over a quarter of respondents indicated that they were first-time attendees in 2020.

Audiences strongly agreed that the Literature & Ideas program had something to say about today's world, with the 'Relevance' metric achieving a result that sat above the overall Festival benchmark.

# LOTTERYWEST FILMS



Lotterywest Films, Somerville, photo by Jessica Wyld

Lotterywest Films ushered in another stunning Perth summer, with the best in cinema from around the world presented on the big screen and under the stars at UWA Somerville Auditorium.

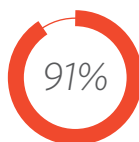
In 2020, Perth's favourite picture garden welcomed new food vendors and a fresh selection of award-winning international films to entertain, excite and inspire.

Cinemagoers shared their nights with the likes of Antonio Banderas, Bill Murray, Fanny Ardant, Willem Dafoe, Robert Pattinson and other big names in cinema across a season of romance, adventure, thrillers, inspiring documentaries, politically charged drama and feel-good family tales.

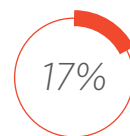
Unfortunately, due to COVID-19 related restrictions, all films scheduled between 16 March to 15 April were cancelled. This resulted in a reduced final attendance figure.

## PATRON EXPERIENCE

Overall Experience  
(% Good/Excellent)



New Audience  
(% Attended program  
for the first time in 2020)



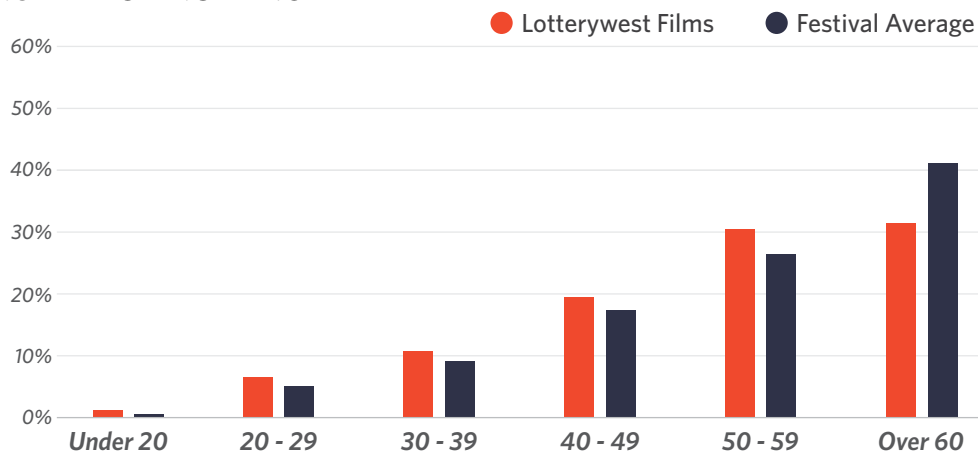
Net Promoter Score



Attendee Average Spend  
(Per visit, ex. ticket price)

**\$35**

## AUDIENCE AGE PROFILE

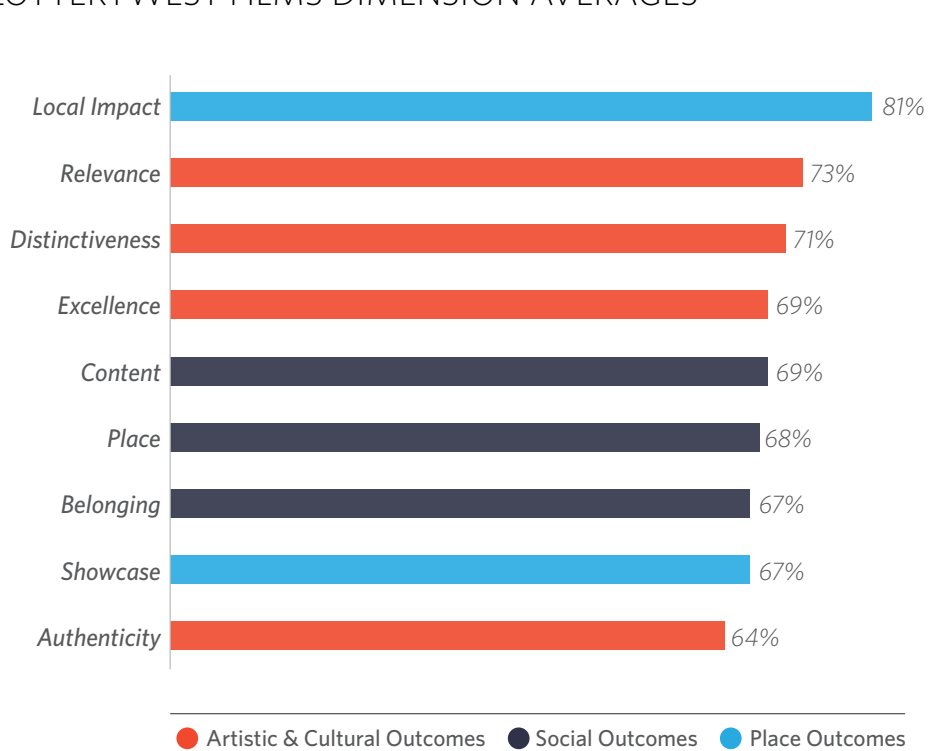


53

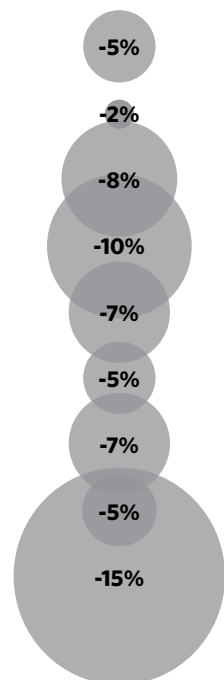
Average Age

↓ -3 years from 2019

## LOTTERYWEST FILMS DIMENSION AVERAGES



Difference to Overall Festival Score



Lotterywest Films attracted a slightly younger audience than in previous years, with the average age three years younger than what it was in 2019. The program has a loyal return audience while still reaching a good proportion of first-time attendees.

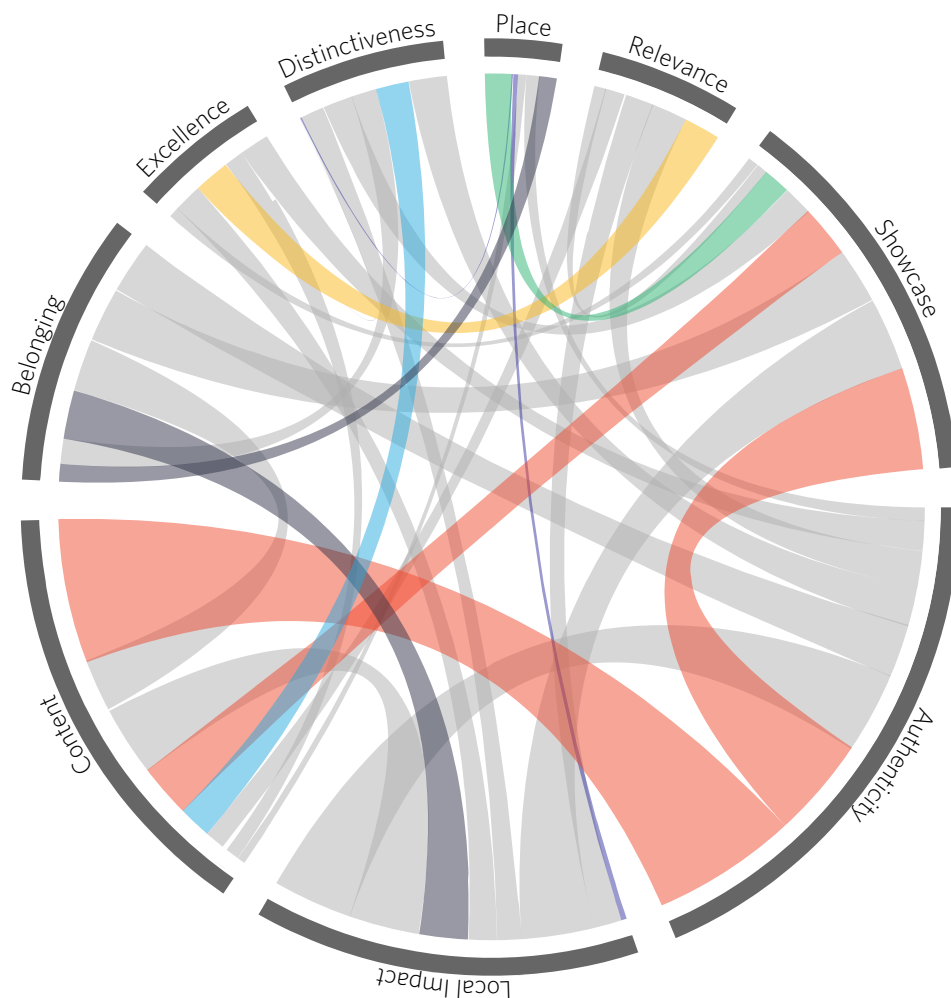
The Net Promoter Score of 69 has also increased when compared to previous years, an excellent score that demonstrates high likelihood of audiences recommending the program to others.

## Event Impact Showcase

Each survey respondent was asked nine dimension questions about the show they experienced<sup>1</sup>. Using statistical analysis, significant clusters of events were identified across the dimension set. While all clusters are significant, the size of each link represents the frequency in which a significant connection was identified between dimensions.

The clustering technique analyses responses from surveys with a statistically relevant sample size.<sup>33</sup> Shows from the Chevron Lighthouse (contemporary music venue) and Performance and Free programs met this requirement. Of these, 19 were identified within a unique cluster.

'Authenticity' ("It had a connection to the State/Country that we live in") had a sizeable representation across all dimension clusters. This speaks to the importance of the dimension in delivering unique impacts across the range of programming and strategic areas of the Festival.



Note: Shows with  $n < 25$  excluded from clustering analysis. Clustering has three key requirements; shows within each cluster must have an individual response distribution that is significantly stronger than the pooled distribution mean, per dimension (z-test,  $p$  value  $< 0.05$ ); the pooled response distribution of the entire cluster must be significantly stronger than the pooled distribution mean, per dimension (z-test,  $p$  value  $< 0.05$ ); cluster selection maximises coverage and representation of dimensions and shows within the cluster dataset.

<sup>1</sup> Voice, Value and Quality were dimensions that asked about audience's experience and perceptions of Perth Festival as a whole.

## Clusters

### **Best of Show:**

Programming that performed well in six or more dimensions were excluded from the clustering process so to promote the discovery of unique impact correlations. These activities therefore represent the complete realisation of the Festival's strategic goals, as reported by audience responses.

- Black Ties
- Buṅgul
- Spinifex Gum

### **Authenticity, Showcase & Content**

With a broad range of diverse and inclusive voices, the content of these experiences were considered authentically Western Australian and showcased the depth of our capital's artistic soul.

- Briggs' Bad Apples House Party
- Ancient Voices
- Bennelong
- Bran Nue Dae
- Highway to Hell

### **Showcase & Place**

When audiences are brought together for compelling, shared experiences, those experiences make us feel proud of where we live. "This can happen in Perth and Perth loves it!" The ability of a meaningful cultural experience to Showcase our artistic and cultural depth, is further compelled by its ability to generate pride in the place we live.

- Briggs' Bad Apples House Party
- Thirteen Ways to Look at Birds
- Ancient Voices
- Colossus
- Craig David
- Highway to Hell
- Moon Duo

Note: *Meow Meow's Pandemonium* featured in the unique cluster of Distinctiveness & Excellence. This cluster was excluded due to the selection ruleset.

## Belonging, Local Impact & Place

These performances were unique in that they inspired local pride and a connection to community, so that audiences identified these experiences as meaningfully 'important'. The selection of music events here suggests that the shared environment of live music is well suited to facilitating social bonding and community pride.

- Colossus
- Craig David
- G Flip
- Highway to Hell
- Weyes Blood

### **Content & Distinctiveness**

This cluster represents unique experiences for audience that were unlike those they may have seen before. The connection with Content suggests that it is because they featured a broad and inclusive range of voices, that it gave them a Distinctive essence.

- Amanda Palmer
- Anthem
- Bennelong
- Fidelio
- Highway to Hell
- MÁM

### **Excellence & Relevance**

These performances proved their Relevance by articulating something about today's world, while simultaneously establishing themselves as an Excellent example of their type.

- I'm a Phoenix, Bitch
- Amanda Palmer
- Bennelong
- Bran Nue Dae
- Colossus
- Kate Tempest
- Neil Gaiman

## 2018 – 2020 Festival Comparison

Perth Festival first implemented the Culture Counts evaluation framework in 2018, allowing for ongoing measurement of new data against baseline results. This consistent measurement provides the ability to identify interesting changes or developments in audience perceptions, including the influence of new programming strategies.

For the purpose of these comparisons, *Highway to Hell* has been compared to large-scale free events from previous years' programs. They were the Perth Festival opening events, *Siren Song* (2018) and *Boorna Waanginy* (2019).

The Patron Experience Comparison shows comparative results across the overall experience score, brand trial, Net Promoter Score and average spend, broken down by program type over the three years.

When compared to 2019, audiences had a more positive experience across the performance and free program, Literature & Ideas and Lotterywest Films events in 2020.

In addition, the Lotterywest Films program was more successful in reaching a new audience in 2020 and achieved a higher Net Promoter Score compared to previous years, demonstrating increased brand loyalty amongst attendees. The Literature & Ideas program also obtained a higher NPS following the 2020 event.

Overall, average spend per person was up in 2020, with all programs' average spend per person increasing when compared to the previous year.

### Patron Experience Comparison

		HIGHWAY TO HELL <sup>1</sup>	PERFORMANCE & FREE PROGRAM	CHEVRON LIGHTHOUSE <sup>2</sup>	LITERATURE & IDEAS <sup>3</sup>	LOTTERYWEST FILMS	OVERALL
Overall Experience	2018	78%	85%	90%	70%	91%	<b>84%</b>
	2019	99%	91%	94%	87%	88%	<b>91%</b>
	2020	92%	93%	94%	92%	91%	<b>92%</b>
New Audience	2018	15%	14%	26%	16%	6%	<b>12%</b>
	2019	50%	8%	39%	27%	9%	<b>17%</b>
	2020	42%	8%	38%	27%	17%	<b>23%</b>
Net Promoter Score	2018	17	45	52	15	43	<b>33</b>
	2019	75	68	61	49	54	<b>61</b>
	2020	47	56	49	54	69	<b>53</b>
Attendee Average Spend	2018	\$55	\$58	\$93	\$76	\$40	<b>\$58</b>
	2019	\$14	\$35	\$55	\$36	\$27	<b>\$23</b>
	2020	\$42	\$64	\$67	\$65	\$35	<b>\$54</b>

For the purpose of this comparison:

- <sup>1</sup> *Highway to Hell* has been compared to free, community events from previous years, *Siren Song* (2018) and *Boorna Waanginy* (2019)
- <sup>2</sup> Chevron Lighthouse has been compared to Chevron Gardens (program previous name, 2018 and 2019)
- <sup>3</sup> Literature & Ideas has been compared to Writers Week (program previous name, 2018 and 2019)



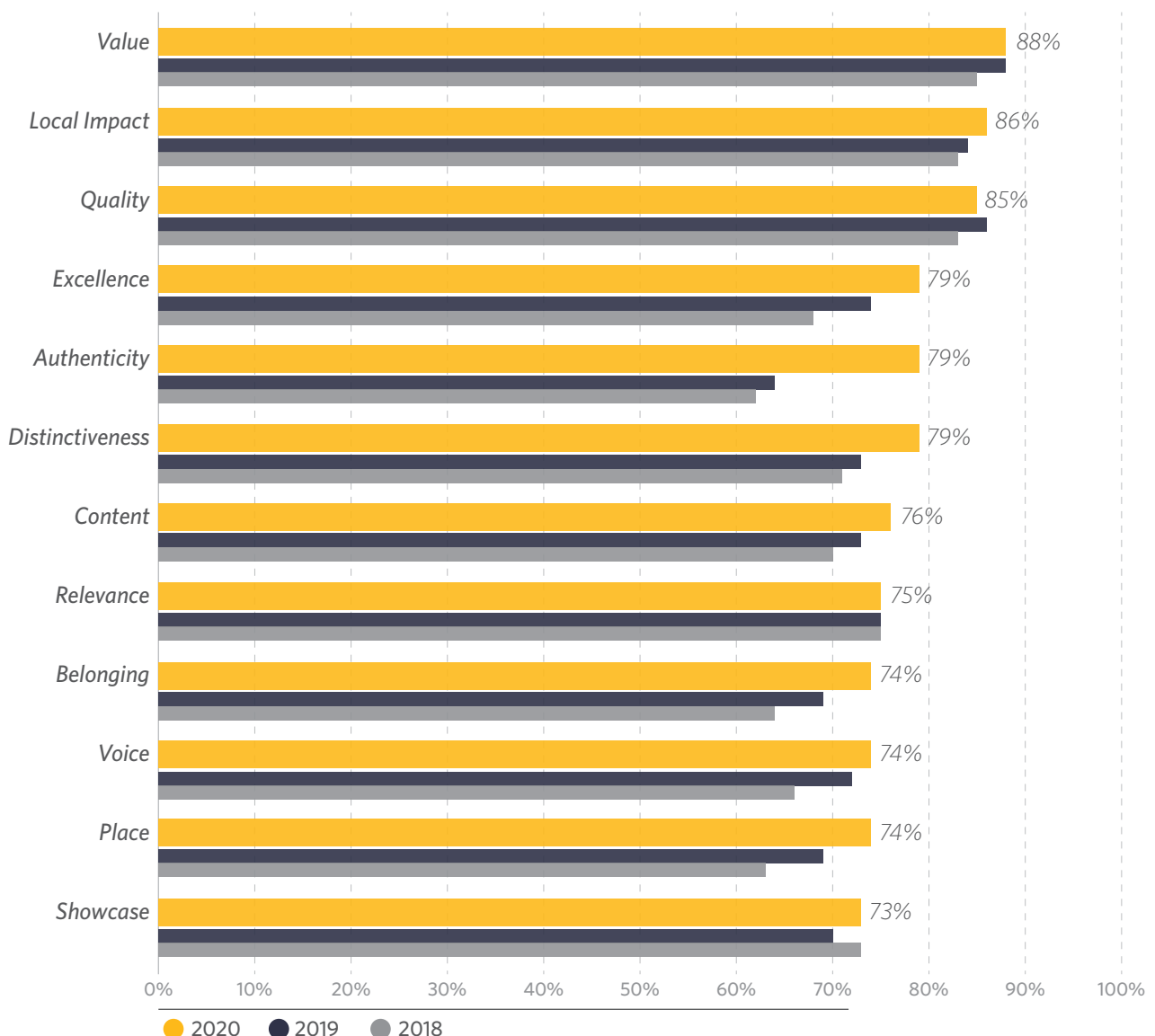
The comparison of outcome metrics results demonstrates the enormous success that Perth Festival had in realising its strategic goals in 2020. In a fantastic result for the Festival, ten of the twelve dimensions measured saw an increase in average, when compared to previous years. This demonstrates the organisation's success in truly achieving cultural and social impact amongst its community.

The 'Authenticity' dimension in particular saw a huge leap (+15% increase) in its score from previous years, demonstrating the increased likeliness of audiences agreeing that Perth Festival events have a connection to the State/Country they live in.

This is no doubt attributable to the Festival's increased focus on featuring Australian stories in its program, including the opening week of First Nations performances.

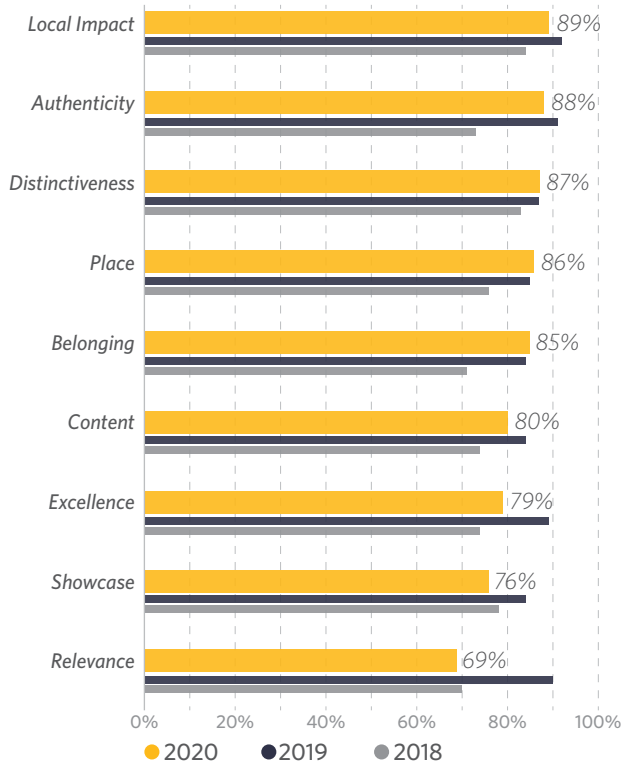
The 'Distinctiveness', 'Excellence', 'Belonging' and 'Place' dimensions also saw significant increases, with audiences more likely to agree that the events were different from other things they'd experienced before, were some of the best they'd seen, that they made them feel connected to others in the community and made them feel proud of their local area.

### 2018, 2019 & 2020 DIMENSION AVERAGE COMPARISON

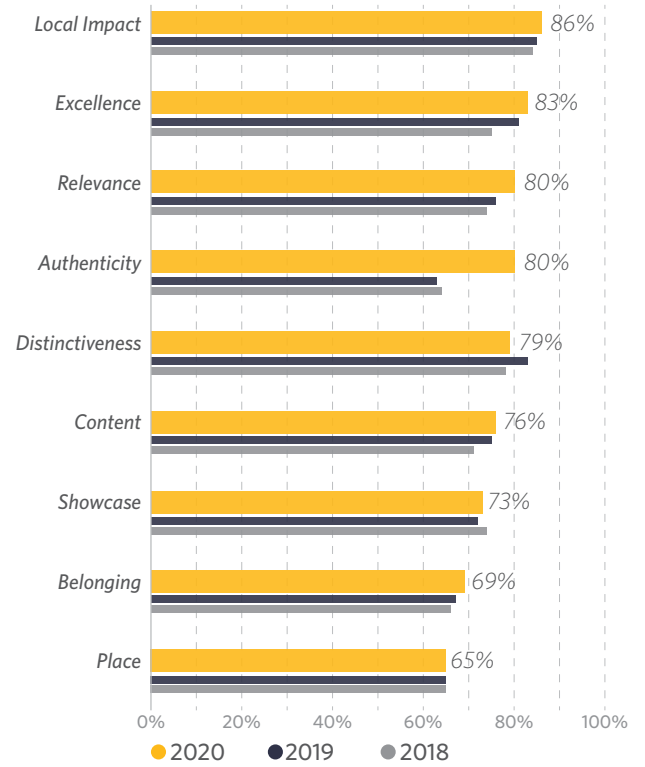


### Program Dimensions Comparison

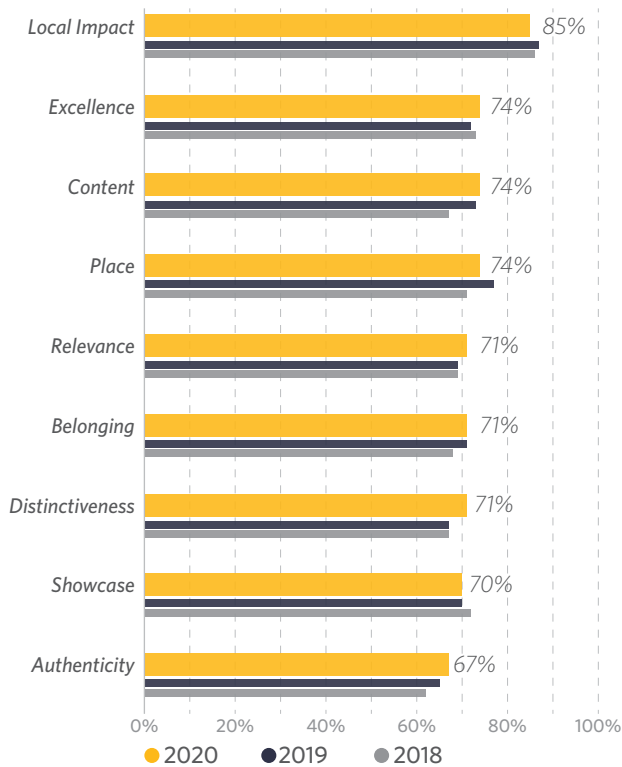
#### HIGHWAY TO HELL *Free Community Event\**



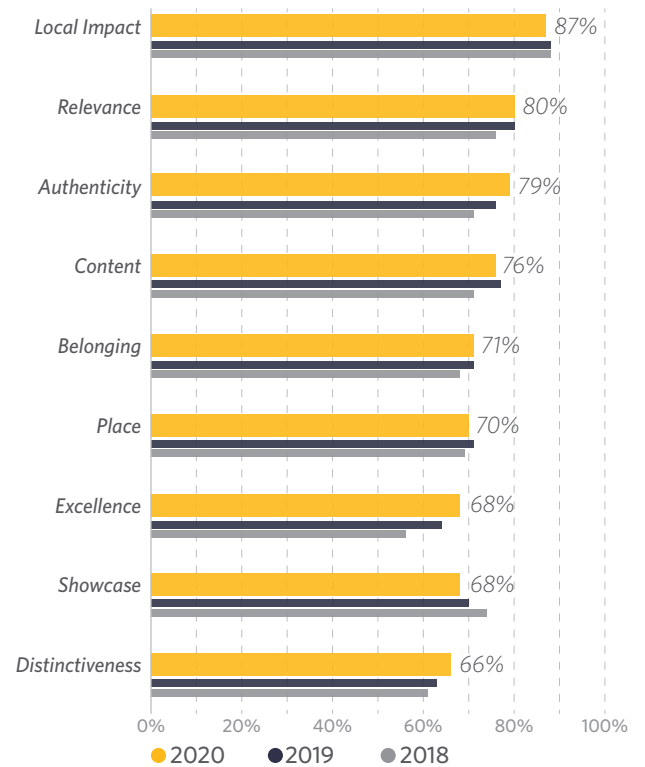
#### PERFORMANCE & FREE PROGRAM



#### CHEVRON LIGHTHOUSE

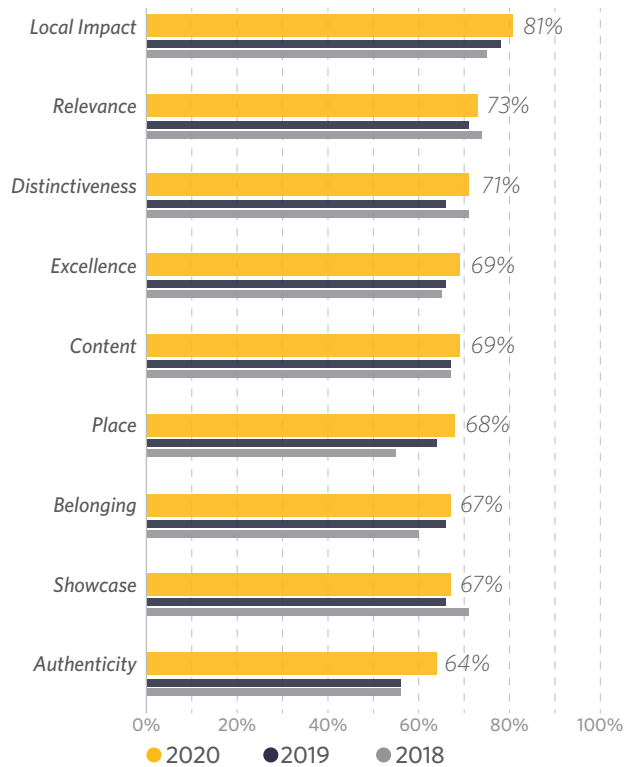


#### LITERATURE & IDEAS



\* Footnote: Highway to Hell has been compared to the large-scale free events from previous years' programs. They were the Festival opening events, Siren Song (2018) and Boorna Waanginy (2019).

## LOTTERYWEST FILMS



By looking at the dimension results at the program-level view, it illuminates how the results from individual programs have impacted the Festival’s dimension averages. The year-on-year comparison also allows organisers to evaluate changes that have been made to that particular stream, or consider what improvements can be made in following years.

It is evident that the performance and free program boosted the sense of ‘Authenticity’ amongst Perth Festival audiences, Chevron Lighthouse offered more distinctive experiences in 2020 and the overall Lotterywest Films experience left an impression on attendees, recording an increase in all dimension scores when compared to the 2019 program.



Literature and Ideas, photo by Jessica Wyld



Bangarra Dance Workshop, photo by Cam Campbell

# Community Engagement

## *Festival Connect*

Perth Festival engages its community with a unique program of tailored workshops, masterclasses, conversations, school sessions and more each year.

The program provides the local arts sector, young people, schools, arts enthusiasts, Festival artists and underrepresented or marginalised communities with once-in-a-lifetime opportunities to connect with and learn from one other.

The Festival truly values its collaborative relationship with stakeholders, including partners and donors whose contributions allow them to realise their creative vision.

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*"Perth Festival's community engagement initiatives are unparalleled in the arts in WA. The team worked collaboratively with YACWA to find the best possible fit for our audience and members within their programming, worked with us to shape the content and developed an amazing, dedicated mini-program catered towards LGBTQAI+-identifying young people. These kinds of initiatives are a vital addition towards the Festival's programming and an important step in empowering people from marginalised groups to engage with meaningful artistic experiences and crucial conversations in WA."*

**Matthew Tomich, Member & Community Engagement Officer, Youth Affairs Council WA**

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## COMMUNITY ENGAGEMENT HIGHLIGHTS

**1,000+**

**Community members** attended free dress rehearsals and community previews

**2,893 & 53** 

**Students** and **Schools** participated in the Creative Learning Program

**300** 

**Lanterns** created for the City of Lights by new migrants and community members in Mirrabooka

**224** 

**Complimentary tickets** used across the contemporary and classical music program by community groups where cost is a barrier to access

**170** 

**Tickets purchased** using community focused ticketing codes

**198** 

**Access tickets booked** (Companion Card, Wheelchair, Auslan, Audio Description and Captioning)

*148 more than 2019* 

**26** 

**Young people engaged** in two new programs across the Literature & Ideas Festival for LGBTQI and African Australian youth

**12** 

Young people engaged as **Good Film Club ambassadors** for the Lotterywest Festival Films

**9** 

**People with disability or lived experience** engaged as paid members in a new Access & Inclusion Advisory Committee

**6** 

**Metropolitan high schools** with lower than average Index for Community Socio-Educational Advantage engaged in the Partner Schools Program

*Double that than in 2019* 

**2** 

**Regional Festival Lab participants** were engaged as a result of the new regional assistance package created in partnership with Regional Arts WA

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*“Perth Festival has provided some fantastic opportunities for the young people we work with. The ‘Bran Nue Dae’ Community Preview was a new and exciting experience for many of the young people and their families. Everyone also had a great time putting their artistic skills into action by creating some bright and vibrant lanterns to be put on display at the Festival of Lights. A big ‘Thank You’ to the Perth Festival team.”*

**Holly Dewar - Youth Programs Coordinator, Metropolitan Migrant Resource Centre**

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## Sector Development Activities

Local artists, arts industry and arts lovers were invited to participate in Perth Festival's *Connect* program, which provides exciting opportunities to engage with and learn from Festival artists and practitioners. The 2020 program included workshops with Bangarra Dance Theatre and the Gesualdo Six, a directing masterclass from Rachael Maza (*Black Ties*) and more.

Each year, ten emerging artists from across disciplines are invited to participate in the *Festival Lab* - to get stuck into the big ideas of the Festival program and

reflect on their own artistic practice. The participants see performances, meet artists, attend workshops and connect with artists working in different ways.

Producers from across the Festival program are also invited to provide insights into the range of experiences they have faced in their work. Candid stories are shared of the highest highs, and the trickiest situations, in a series of informative discussions over the course of the Festival.

679



Participants in sector engagement programs

229



Industry passes  
↑ 32% more than 2019

602



Staff employed by the Festival

233



Volunteers for the Festival

### OVERALL EXPERIENCE



Of participants rated their Perth Festival 2020 experience as good or excellent  
↓ -1% from 2019

### PUBLIC PERCEIVED IMPORTANCE



It is important that Perth Festival supports the local arts sector through sector development activities like these  
↓ -2% from 2019

### PROGRAM OUTCOMES



**Networks**  
*It enabled me to collaborate with others*  
↓ -5% from 2019



**Skills**  
*It helped me develop new and existing skills and gain experience*  
↑ 4% from 2019



**Opportunity**  
*It opened up new opportunities for me*  
↓ -10% from 2019



**Collaboration**  
*It enabled me to collaborate with others*  
↓ -1% from 2019



**Development**  
*It contributed to the development of my creative practice*  
↑ 5% from 2019



## Artists and Arts Organisations

Over 2,200 artists from across the globe participated in Perth Festival 2020. As always, the diverse program celebrated emerging and established practitioners working across all genres.

More than three quarters of participating individual artists were Western Australian and 17% were from elsewhere in Australia, with much of the program dedicated to Australia's place, people and stories. The remaining 7% of artists travelled to the Festival from overseas.

*"Perth Festival eagerly collaborated with Circa with enthusiasm and skill to build a highly ambitious, large scale engagement work that had profound effect on the participants and audiences."*

Survey Respondent, Circa

*"There's a reason Perth Festival has been around so long ... they really know their stuff!"*

Yasoda Gonzalez, Electric Gardens Festival

2,286 

Artists  
↑ 62% more than 2019

77% 

Local

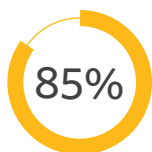
17% 

Interstate

7% 

Overseas

## OVERALL EXPERIENCE



Of artists rated their Perth Festival 2020 experience as good or excellent

↑ 1% from 2019

## OUTCOMES



**Opportunity**

*It opened up new opportunities for me*

↑ 4% from 2019



**Profile**

*It helped raise my profile*

↑ 3% from 2019



**Growth**

*It appealed to new audiences*

↓ -3% from 2019



**Collaboration**

*It enabled me to collaborate with others*

↓ -3% from 2019

## Creative Learning & Partner Schools Programs

Perth Festival believes all Western Australian young people should have access to meaningful arts experiences. The *Creative Learning* program is for young people and the organisations and individuals that support them. As part of the program, the Festival offers workshops, creative projects and resources, opportunities for teachers, special ticket prices for community and school groups, and excursion planning.

In addition, the Festival also partners with a number of schools each year as part of the *Partner Schools Program*. The program aims to provide access to the arts in a way the school/community group may not otherwise experience. In 2020, the number of partner schools doubled to six, giving more students the opportunity to watch, connect with and learn from the world's leading visionary artists.

*"In 2020, Girrawheen Senior High School entered a partnership with Perth Festival that has provided amazing access to quality Arts experiences for our staff and students. Without this partnership, many of our students would not be able to experience these cultural opportunities. It has been wonderful to hear our students feedback about each event, such as the joy they have felt about their first outdoor cinema experience. Thank you to Perth Festival for the opportunities that this partnership has offered our school."*

Principal, Girrawheen Senior High School

2,893

Student participants



294

Teachers engaged



56

Schools engaged



33

Free educational programs



15

Incursions delivered



### OVERALL EXPERIENCE

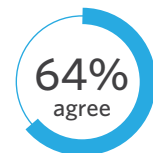


Of students and teachers rated their Perth Festival 2020 experience as good or excellent

### STUDENT OUTCOMES



**Experience**  
*It was an exciting or inspirational experience*



**Stretch**  
*I did something I didn't know I was capable of*  
↓ -2% from 2019



**Distinctiveness**  
*It was different to things I'd experienced before*  
↓ -3% from 2019



**Skills**  
*It helped me develop new skills and gain experience*  
↓ -1% from 2019

## Partners and Donors

As a not-for-profit charitable organisation, Perth Festival's network of sponsors and donors provide the organisation with vital support to deliver a comprehensive annual program that in turn supports local, national and international artists and companies. Beyond the spotlight of each Festival, the Festival's work continues year-round across Creative Learning,

commissioning new works and developing the WA arts sector.


The Festival proudly recognises their sponsors and donors for their generous support, delivers partnership activation, and engages through exclusive access to special supporter events throughout the season.

*"Perth Festival gets better every year. I love that the 2020 Festival was very WA orientated ... WA locals need something to make them proud of their origins and I think the Festival did an amazing job of achieving this."*

Survey Respondent, Partner


*"Supporting the Arts is so important to our community. Without the Arts there is no heart."*


Survey Respondent, Donor

45   
Partners

\$9.4 million   
Funding from State and Local Government

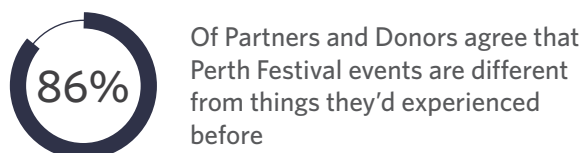
25   
In-kind Supporters

\$2.7 million   
Sponsorship and Donation Income

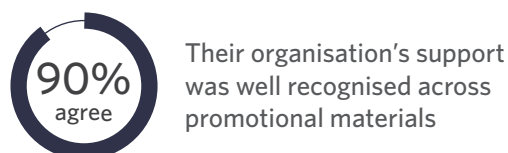
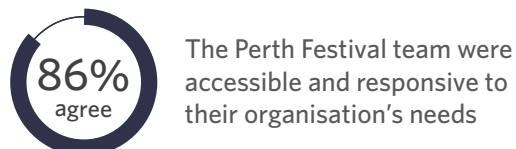
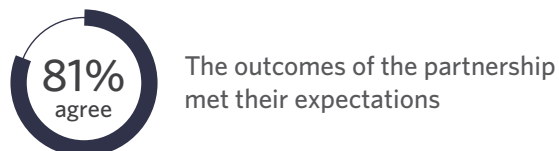
1,272   
Donors

\$1.4 million   
Contra Sponsorship Value

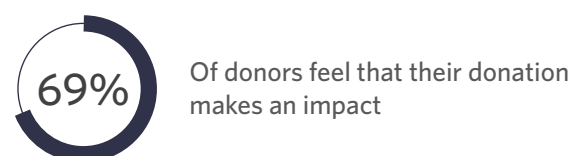
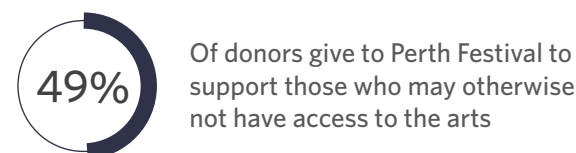
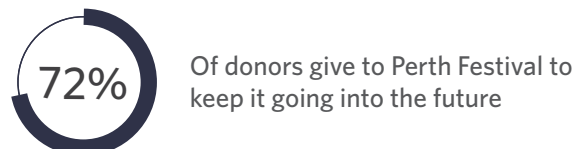
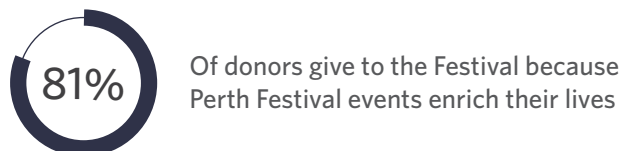
### OVERALL EXPERIENCE



### PARTNER OUTCOMES



### DONOR OUTCOMES





Perth Festival City of Lights at Perth Concert Hall, photo by Tashi Hall

# Economic Impact

Perth Festival makes an invaluable contribution to the city's cultural and social life, as well as stimulating spend in the economy that wouldn't have otherwise occurred.

The following section puts a spotlight on the 2020 Festival's economic impact, based on audience and artist expenditure, accommodation expenditure and organisational spend.

The Tourism Impact Summary examines the spend that came from interstate and overseas visitors to Perth, who attended Perth Festival as part of their trip.

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*"Highway to Hell showed how creative events get tills ringing. It was certainly innovative and definitely unusual. And it proved to be a masterstroke."*

Editorial, The West Australian

---



ECONOMIC IMPACT 

**\$30.3 million**

Direct Economic Impact

↑ 60% more than 2019

**\$84.7 million**

Multiplied Impact

HIGHWAY TO HELL 

**\$3.8 million**

Audience Expenditure

**\$6.1 million**

Total Direct Expenditure

**\$17.2 million**

Total Multiplied Impact

AUDIENCE 

**\$14.0 million**

Gross Audience Expenditure

**413,078**

Total Attendance

**43%**

Went out for a meal before or after attending Perth Festival

**19%**

Wandered or explored the city before or after attending Perth Festival

**28%**

Went to a pub, club or licensed venue before or after attending Perth Festival

**\$54**

Attendee average spend (per visit, ex. ticket price)

ACCOMMODATION 

**\$1.5 million**

Audience Accommodation Impact

**5,532**

Event Staying Visitors

**24,341**

Event Visitor Nights

ARTISTS 

**378**

Interstate Artists

**155**

Overseas Artists

**\$109**

Artist Average Daily Expenditure

TOURISM IMPACT 

**\$11.0 million**

Total Direct Tourism Expenditure

↑ 8% more than 2019

**\$6.1 million**

Total Direct Tourism Impact

↑ 4% more than 2019

**28%**

Tourists came to Perth mainly for Perth Festival

## Economic Impact Assessment

### Audience Expenditure

Perth Festival's post-event survey asks attendees to identify how much they spent before, during and after their visit to a Festival event. This information helps organisers to understand the amount of spend generated in the area due to the event.

In order to assess overall economic impact, it is essential to measure the proportion of expenditure that would have been spent regardless of the event versus the unique spending that occurred only because the event was on. To enable this, surveyed attendees are asked what they would have done if they had not attended Perth Festival.

Responses to this question are used to calculate the additionality adjustment - that is, the percentage of spending that is considered additional.

Patron expenditure data captured in the surveys has been used to calculate averages across the five key programs as referenced by this report.

For the purpose of audience expenditure calculations, known children attendance has been removed from the attendance figures.

### Audience Expenditure Summary

	HIGHWAY TO HELL	PERFORMANCE & FREE PROGRAM	CHEVRON LIGHTHOUSE	LITERATURE & IDEAS	LOTTERYWEST FILMS	TOTAL
Average Spending	\$42	\$64	\$67	\$65	\$35	<b>\$54</b>
Additionality Adjustment	68%	70%	71%	53%	78%	<b>70%</b>
Attendance	107,427	172,546	25,608	14,849	55,234	<b>375,664</b>
<b>Total Direct Impact</b>	<b>\$3,062,388</b>	<b>\$7,701,539</b>	<b>\$1,201,182</b>	<b>\$512,503</b>	<b>\$1,535,756</b>	<b>\$14,013,368</b>



Respondents were also asked whether they stayed overnight as a result of their visit to Perth Festival, and if so, how much they were spending on accommodation per night, per person.

The value of total accommodation spend has been calculated based on the share of staying visitors, the average per night spend on accommodation and the length of stay. Average spend per night and average nights stayed are pooled averages across all Festival responses.

### Accommodation Expenditure Summary

	<b>TOTAL</b>
Percentage of Staying Visitors	6%
Number of Staying Visitors	5,532
Average Nights Stayed	4.4
Average Spending per Night	\$119
Additionality Adjustment	51%
<b>Total Direct Impact</b>	<b>\$1,465,300</b>

### Artist Expenditure

Perth Festival 2020 engaged a total of 533 individual artists from interstate and overseas, and they travelled to Perth to perform or present as part of the Festival.

Artists were asked to indicate their average expenditure per day while in Perth, as well as how many nights they stayed as part of their visit. It is assumed that these artists would not have otherwise been in Perth, so no additionality adjustment has been applied to artist spend.

### Artist Expenditure Summary

	<b>INTERSTATE</b>	<b>OVERSEAS</b>	<b>TOTAL</b>
Number of Interstate/ overseas Artists	378	155	533
Average Nights Stayed			9.9
Average Daily Expenditure Artist			\$109
<b>Total Direct Impact</b>	<b>\$404,711</b>	<b>\$166,646</b>	<b>\$571,357</b>

### Organisation Expenditure

The organisational expenditure of Perth Festival makes a significant contribution to the overall economic impact of the Festival. Spending on contractors, artists and suppliers directly injects money into the State economy.

Wages and other associated costs also result in the generation of further economic impacts through employee expenditure. A summary of organisational expenditure is shown in the table.

### Organisation Expenditure Summary

Total cost of sales	\$8,560,230
<i>Portion spent in WA</i>	<i>\$5,720,599</i>
Total expenses	\$5,717,038
<i>Portion spent in WA</i>	<i>\$5,113,574</i>
<b>Total Organisation Expenditure</b>	<b>\$14,277,269</b>
<b>Total Spent in WA</b>	<b>\$10,834,172</b>



## Impact Summary

The total expenditure as a direct result of Perth Festival also benefits a range of sectors as it flows through the economy. For example, customer spending at venues is then further spent on things such as supplies or staff wages. A simplified method of estimating this involves applying a multiplier to Direct Economic Impact.

For the purpose of this analysis, output multipliers derived from industry-specific *ABS Input-Output Tables 2012-13*<sup>1</sup> have been applied to total direct expenditure.

This is the first year that Perth Festival has applied output multipliers to determine Total Multiplied Impact. A Perth Festival 2018 and 2019 Impact Summary Comparison and Adjustment has been included on Page 49, to show comparable figures from previous years of measurement.

	<b>DIRECT ECONOMIC IMPACT</b>	<b>MULTIPLIER</b>	<b>TOTAL MULTIPLIED IMPACT</b>
Attendee Spending	\$15,478,667		\$44,948,608
<i>Event spending</i> <sup>2</sup>	\$14,013,368	2.92	\$40,919,033
<i>Accommodation</i> <sup>3</sup>	\$1,465,300	2.75	\$4,029,574
Artist Spending <sup>4</sup>	\$571,357	2.92	\$1,668,362
Organisation Spending <sup>5</sup>	\$14,277,269	2.67	\$38,120,308
<b>Total</b>	<b>\$30,327,293</b>		<b>\$84,737,278</b>

<sup>1</sup> Input-Output tables provide information about supply and disposition of commodities in the Australian economy as well as the structure and inter-relationships between industries. The National Input-Output tables 2012-13 were used to derive total multipliers, which consider the total supply-chain of goods and services for the activity in question. Source: Australian Bureau of Statistics, *Australian National Accounts: Input-Output Tables, 2012-13*, cat. no. 5209.0.55.001, viewed 1 July 2019.

<sup>2</sup> Attendee (Event) and Artist Spending scaled by 2.92, the average of the national Food & Beverage Output Multiplier (2.96) and Retailer Output Multiplier (2.88).

<sup>3</sup> Accommodation expenditure scaled by the national Accommodation Output Multiplier (2.75).

<sup>4</sup> Organisation expenditure scaled by the Australian national Heritage, Creative and Performing Arts Output Multiplier (2.67).



MÁM, photo by Ross Kavanagh

## Perth Festival 2018 and 2019 Impact Summary Comparison and Adjustment

Culture Counts has updated the economic impact methodology to calculate Total Multiplied Impact for Perth Festival 2020, implementing industry-specific output multipliers that are based on the Australian Bureau of Statistics National Accounts Data<sup>1</sup>. These multipliers represent the flow-on effects of different spending activity within the Festival's direct economic impact, based on different sectors.

For comparison purposes, adjusted economic impact figures for Perth Festival 2018 and 2019 have been provided so as to understand year-on-year changes. This analysis reveals that Perth Festival's economic impact increased by 60% in 2020, when compared to the 2019 Festival.

### Perth Festival 2018 Economic Impact Summary Adjustment

	DIRECT ECONOMIC IMPACT	OUTPUT MULTIPLIER	TOTAL MULTIPLIED IMPACT
Attendee Spending	\$10,164,765		\$29,502,245
<i>Event spending</i> <sup>2</sup>	\$9,112,598	2.92	\$26,608,786
<i>Accommodation</i> <sup>3</sup>	\$1,052,167	2.75	\$2,893,459
Artist Spending <sup>2</sup>	\$329,339	2.92	\$961,670
Organisation Spending <sup>4</sup>	\$8,153,625	2.67	\$21,770,179
<b>Total</b>	<b>\$18,647,729</b>		<b>\$52,234,094</b>

### Perth Festival 2019 Economic Impact Summary Adjustment

	DIRECT ECONOMIC IMPACT	OUTPUT MULTIPLIER	TOTAL MULTIPLIED IMPACT
Attendee Spending	\$9,275,791		\$26,827,440
<i>Event spending</i> <sup>2</sup>	\$7,758,913	2.92	\$22,656,026
<i>Accommodation</i> <sup>3</sup>	\$1,516,878	2.75	\$4,171,415
Artist Spending <sup>2</sup>	\$395,154	2.92	\$1,153,850
Organisation Spending <sup>4</sup>	\$9,327,617	2.67	\$24,904,737
<b>Total</b>	<b>\$18,998,562</b>		<b>\$52,886,028</b>

<sup>1</sup> Input-Output tables provide information about supply and disposition of commodities in the Australian economy as well as the structure and inter-relationships between industries. The National Input-Output tables 2012-13 were used to derive total multipliers, which consider the total supply-chain of goods and services for the activity in question. Source: Australian Bureau of Statistics, *Australian National Accounts: Input-Output Tables, 2012-13*, cat. no. 5209.0.55.001, viewed 1 July 2019.

<sup>2</sup> Attendee (Event) and Artist Spending scaled by 2.92, the average of the national Food & Beverage Output Multiplier (2.96) and Retailer Output Multiplier (2.88).

<sup>3</sup> Accommodation expenditure scaled by the national Accommodation Output Multiplier (2.75).

<sup>4</sup> Organisation expenditure scaled by the Australian national Heritage, Creative and Performing Arts Output Multiplier (2.67).

## Tourism Impact Summary

Further analysis was conducted to measure the specific direct impact of tourists due to their Perth Festival visit. This combines the expenditure of their visits to Perth Festival events with the expenditure of their entire stay in WA.

Based on survey data, it is estimated that 3,978 unique interstate or overseas visitors attended Perth Festival events. In addition 564 Western Australians indicated that they would have done something elsewhere outside of WA if they had not attended Perth Festival. This represents new spending directly coming into the state from outside of WA, as well as WA-based spending that would have left the state if not for Perth Festival. This escape spending has been classified as 'Interstate Leakage'.

By applying the average number of event visits figures for tourist visitors we can calculate the unique attendance of tourists. Average spend-per-day is a conservative summation of accommodation spend and daily spend. Direct tourism expenditure from attendees is assessed based on unique visits, multiplied by tourist average spend per day.

This is added to the direct expenditure from travelling artists to calculate a total direct expenditure of tourism.

### Tourism Expenditure Summary

	INTERSTATE LEAKAGE	INTERSTATE	OVERSEAS	TOTAL
Tourist Attendance	2,446	6,947	10,293	
<i>Perth Festival (ex. Highway to Hell)</i>	1,766	4,533	3,050	<b>19,685</b>
<i>Highway to Hell</i>	680	2,414	7,243	
Average Event Visits	4.33	4.33	4.33	
Tourist Unique Attendance	564	1,603	2,375	<b>4,542</b>
<i>Perth Festival (ex. Highway to Hell)</i>	407	1,046	704	
<i>Highway to Hell</i>	157	557	1,671	
Tourist Average Nights Stayed	8.7	9.7	8.0	
Tourist Average Spend per Day	\$261	\$291	\$240	
<i>Accommodation</i>	\$151	\$148	\$153	
<i>Daily Spend</i>	\$110	\$143	\$87	
Total Trip Visitor Nights <i>Tourists</i>		15,599	19,001	<b>34,599</b>
Direct Tourism Expenditure <i>Tourists &amp; WA Locals</i>	\$1,280,242	\$4,546,793	\$4,563,351	<b>\$10,390,387</b>
Direct Tourism Expenditure <i>Artists</i>		\$404,711	\$166,646	<b>\$571,357</b>
<b>Total Direct Tourism Expenditure</b>	<b>\$1,280,242</b>	<b>\$4,951,505</b>	<b>\$4,729,997</b>	<b>\$10,961,744</b>

↑ 8% from 2019

In addition to total expenditure, it is important to calculate the additionality of tourism expenditure. This represents the influence that Perth Festival has on tourists coming to the state, as well as on their daily spending.

Event additionality asks attendees what they would have done otherwise if it was not for their attendance at the event. Spending from attendees that would have otherwise been in the area is therefore discounted because it is assumed they would have spent money regardless of Perth Festival.

Trip additionality asks tourists how much influence Perth Festival had on their decision to visit WA. Tourists that indicated Perth Festival was their primary reason for attending means that 100% of

their total trip spend is attributable to Perth Festival, whereas tourists that were unaware of Perth Festival before visiting WA indicates that Perth Festival is responsible for 0% of their trip spend. A weighted scale of attribution is applied to calculate an overall trip additionality figure.

The table shows the effect of applying additionality on the Direct Tourism Expenditure figures. Direct Tourism Event Impact is a product of unique attendance by average events attended, average event spend and the additionality of what attendees would have done otherwise. Direct Tourism Trip Impact is a product of unique attendance by average nights stayed, average daily spend and the additionality of how much Perth Festival influenced their reason to visit WA.

### Tourism Additionality

	ATTRIBUTION	INTERSTATE	OVERSEAS	WEIGHTED AVERAGE
Perth Festival was my main reason for visiting WA	100%	44%	10%	28%
Perth Festival was a contributing factor to my visiting WA	50%	15%	18%	16%
I rescheduled or extended a trip I already had because of Perth Festival	25%	7%	8%	8%
I was already in WA but knew about Perth Festival	5%	26%	34%	30%
I was not aware of Perth Festival before coming to WA	0%	7%	30%	18%
<b>Trip Additionality</b>		<b>55%</b>	<b>23%</b>	<b>39%</b>

TOURISM IMPACT SUMMARY	INTERSTATE LEAKAGE	INTERSTATE	OVERSEAS	TOTAL
Unique Attendance	564	1,603	2,375	
<i>Average Nights</i>	8.7	9.7	8.0	
<i>Average Events</i>	4.3	4.3	4.3	
<i>Daily Spend</i>	\$261	\$291	\$240	
<i>Event Spend</i>	\$110	\$143	\$87	
<b>Tourism Additionality</b>				
<i>Additionality Adjustment (Event)</i>	100%	63%	62%	
<i>Additionality Adjustment (Trip)</i>	39%	55%	23%	
Direct Audience Event Impact	\$268,797	\$624,128	\$559,920	<b>\$1,452,845</b>
Direct Audience Trip Impact	\$505,326	\$2,500,736	\$1,035,881	<b>\$4,041,944</b>
Direct Artist Impact		\$404,711	\$166,646	<b>\$571,357</b>
<b>Total Direct Tourism Impact</b>	<b>\$774,123</b>	<b>\$3,529,575</b>	<b>\$1,762,447</b>	<b>\$6,066,145</b>

↑ 4% from 2019



Briggs' Bad Apples House Party, photo by Tashi Hall.

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