

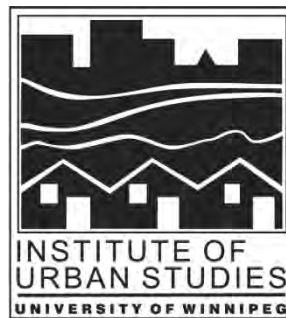
# **The Winnipeg Fringe Festival: Survey Report**

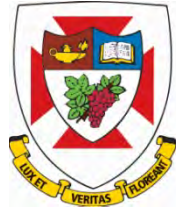
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**1988**

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**The Institute of Urban Studies**





THE UNIVERSITY OF  
WINNIPEG

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**THE WINNIPEG FRINGE FESTIVAL: SURVEY REPORT**

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The Institute of Urban Studies is an independent research arm of the University of Winnipeg. Since 1969, the IUS has been both an academic and an applied research centre, committed to examining urban development issues in a broad, non-partisan manner. The Institute examines inner city, environmental, Aboriginal and community development issues. In addition to its ongoing involvement in research, IUS brings in visiting scholars, hosts workshops, seminars and conferences, and acts in partnership with other organizations in the community to effect positive change.

*Tom Carter*

**THE WINNIPEG FRINGE FESTIVAL  
SURVEY REPORT**

Institute of Urban Studies  
University of Winnipeg

October 5, 1988

**TABLE OF CONTENTS**

<b>TABLE OF CONTENTS</b>	ii
<b>LIST OF TABLES</b>	iii
<b>EXECUTIVE SUMMARY</b>	iv
<b>1.0 INTRODUCTION</b>	1
<b>2.0 METHODOLOGY</b>	2
<b>3.0 PATRON SURVEY RESULTS</b>	3
3.1 Respondent Population	3
3.2 Visiting Patrons	3
3.3 All Patrons	6
3.4 Patron Expenditure at the Fringe Festival	13
3.5 Total Economic Benefit	15
3.6 Expenditures by Category	16
<b>4.0 BUSINESS SURVEY RESULTS</b>	17
<b>5.0 THE WINNIPEG AND EDMONTON FRINGE FESTIVALS: A COMPARISON</b>	20
<b>6.0 CONCLUSIONS</b>	22
<b>APPENDIX I FRINGE FESTIVAL SURVEY FORMS</b>	24

## LIST OF TABLES

TABLE 1	Patron-Group Breakdown	3
TABLE 2	Visitor Accommodation	4
TABLE 3	Hotel Location	4
TABLE 4	Reasons for Coming to Winnipeg	5
TABLE 5	Mode of Transportation Used by Visitors	5
TABLE 6	Average Anticipated Length of Stay in Winnipeg	6
TABLE 7	"Has the Fringe Festival Affected the Length of Your Stay?"	6
TABLE 8	Average Number of Shows Seen	7
TABLE 9	Type of Show Seen/Intended to See	7
TABLE 10	Sources of Information About the Festival	8
TABLE 11	Do You Regularly Attend Some Form of Theatre?	8
TABLE 12	Average Size of Party	9
TABLE 13	Composition of Party	9
TABLE 14	Age of Patrons	10
TABLE 15	Income of Patrons	10
TABLE 16	Calculation of Attendance	14
TABLE 17	Mean Patron Expenditures	14
TABLE 18	Estimated Patron Expenditure	15
TABLE 19	Percentage Expenditures by Category	16
TABLE 20	Business Type	17
TABLE 21	Perceived Effect	17
TABLE 22	Positive Effects on Business	18
TABLE 23	Perceived Effect on Sales	18
TABLE 24	Comparison of The Edmonton (1984) and Winnipeg (1988) Fringe Festivals	20

## LIST OF FIGURES

FIGURE 1	Income	11
FIGURE 2	Income by Patron-Type	12

## EXECUTIVE SUMMARY

The 1988 Fringe Festival was the first of its kind in Winnipeg. Drawing on the experiences of Edmonton, Vancouver and Victoria, the Manitoba Theatre Centre organized the Festival which took place in the vicinity of the Old Market Square. There was a perceived need by the administrators to measure the impact and success of the Festival beginning in its first year, and to continue this process on a yearly basis. The Institute of Urban Studies was contracted to design and implement a survey of patrons attending the Festival, and a survey of businesses in the vicinity of the Festival, and produce a report on the results.

The figures in this report reflect the attendance at indoor venues only. Attendance at the outdoor performances could only be estimated using rough head counts. Approximately 3,000 survey forms were distributed to the patrons at the Festival with 963 (32%) returned. Similarly, approximately 125 forms were circulated among local businesses with 83 (69%) returned. These return rates support results which are significant and reliable.

The major findings and conclusions of the report are outlined below:

- 16,000 tickets were sold for indoor venues and the attendance at the outdoor performances was estimated at 14,000.
- from ticket sales and survey information it was estimated that 3,306 patrons attended the indoor venues at the Fringe Festival.
- the average number of shows attended was 4.9 with comedy/drama-type shows (plays) listed as the type of show attended most.
- the patrons as a group were a relatively young crowd, 74.7% were under the age of 40, 29.4% under the age of 25.
- the majority of patrons (57.7%) had incomes of less than \$25,000.
- the average size of a party attending the Festival was 2.8 persons and 51.7% of the respondents said they attended the Festival with a group of friends.
- 34.1% of patrons were not regular theatre goers.
- of the 963 respondents 46.9% said they had heard of the Festival from sources other than advertisements (i.e. friends).
- visitors from outside of Winnipeg who attended the Festival stayed in the city for an average of 9.7 days. 55.3% travelled to Winnipeg by automobile and 24.3% come by air. 45.5% stayed with relatives while in town. When asked if the Festival had affected the length of their stay 37.1% said "yes".
- of the 963 patrons who returned surveys, 822 (85.4%) were Winnipeggers, 103 (10.7%) were visitors who came to Winnipeg for reasons other than the Fringe Festival, and 38 (3.9%) were visitors who came specifically for the Festival. These proportions can be extrapolated to estimate the total number of each patron-type attending the Festival. The numbers were 2,822 Winnipeggers, 354 visitors coming for other reasons and 130 visitors coming specifically for the Fringe Festival.
- the average expenditure for a patron at the Fringe Festival (not including admission fees) was \$35.46. Winnipeggers spent an average of \$24.59. Visitors who came to Winnipeg for reasons other than the Festival spent an average of \$54.03. Visitors who came to Winnipeg specifically for the Fringe Festival spent an average of \$222.45. The total associated expenditure of all patrons was estimated at \$117,519. Of this amount 47.4% (\$55,704) was accounted for by food purchases.

## CONCLUSIONS

- 1) the Fringe Festival met its goal of making theatre accessible to those who usually do not attend.
- 2) the Festival had an overall positive effect on the city and on the Market Square area in particular.
- 3) the Festival had a positive economic effect on the city, over \$117,000 of patron expenditure is directly attributable to the Fringe Festival. Other expenditures by the Fringe Festival administration, the performers and related businesses must be added to this figure in order to estimate the Festival's overall economic impact.
- 4) it may be beneficial to advertise the Festival more broadly and to start advertising earlier.
- 5) the local businesses were generally enthusiastic about the Festival yet had little forewarning about it, or part in it. It may be desirable to co-ordinate with the local businesses in order to heighten the atmosphere and provide for patron expenditure.
- 6) as food was a major expenditure of the patrons it may be desirable to plan with the aid of local businesses and vendors for more food concessions.

## 1.0 INTRODUCTION

The Manitoba Theatre Centre presented the first annual Winnipeg Fringe Festival between 16 July and 24 July 1988. The Institute of Urban Studies was contracted to design and implement a survey of patrons as well as a survey of businesses in the area adjacent to the Festival. The Fringe Festival, located in and around the Old Market Square area, presented over 45 theatre companies in approximately 270 performances over nine days. The objective of the survey was to determine:

- the general characteristics of the patrons,
- an estimation of expenditures by patrons,
- the impact of the Festival in terms of activity in the vicinity and economic benefit, to the City as a whole, and
- the impact of the Festival on the non-theatre-going public.

This report will outline the survey results and discuss the items listed above as well as any other pertinent findings.



## 2.0 METHODOLOGY

Two survey instruments were used to gather data for this study (see Appendix #1) a survey of patrons and one of businesses. The patron survey was distributed to Festival audiences prior to each show and retrieved before the respondents left the venue. The business survey was distributed to local businesses prior to the Festival with instructions outlining how it was to be completed. These were collected one to three days after the Festival.

Approximately 3,000 survey forms were distributed to patrons during the festival. A total of 963 completed forms were returned, for a return rate of approximately 32%, almost one third. The survey consisted of 17 questions; six for visitors, one for Winnipeggers and the remaining 10 for all patrons.

Over 120 businesses were given surveys with 83 usable returns retrieved. This produced a return rate of approximately 69%. The survey included eight questions dealing with the effect of the festival on business and the area.

The completed forms were coded (information translated from the form into numerical data) and the data entered into data files compatible with IBM-based statistical software. SPSSPC<sup>+</sup> software was used to process the data. Frequencies and related crosstabulations were produced in order to synthesize the survey information.

The high return rate and strong performance of the two survey instruments produced very significant and reliable results.

### 3.0 PATRON SURVEY RESULTS

#### 3.1 Respondent Population

It is possible to divide the respondent population of 963 individuals into three groups:

- 1) Winnipeggers
- 2) Visitors who came specifically for the Festival (V1)
- 3) Visitors who **did not** come specifically for the Festival (V2).

The second and third groups constitute the visitor population and will be referred to as "V1" and "V2" in most tables and figures which describe data related to visitors. Table 1 describes the percentage breakdown of these three groups.

**TABLE 1**  
**Patron-Group Breakdown**

Group	#	%
Winnipeggers	822	85.4
V1 (visitors coming specifically for the Festival)	38	3.9
V2 (visitors <u>not</u> coming specifically for the Festival)	103	10.7
Total	963	100.0

Winnipeggers form the largest group. The number of visitors who travelled to the city expressly for the festival makes up only 3.9% of the total respondent population. The proportional relationship between these three groups can be extrapolated and it can be assumed that the entire population of Fringe Festival patrons could be apportioned using the same distribution.

#### 3.2 Visiting Patrons

The 141 respondents who were visitors to the city were first asked a series of questions dealing with their trip to, and their stay in, Winnipeg. Table 2 describes the answers to the question "Where are you staying?"

**TABLE 2**  
**Visitor Accommodation**

<b>Accommodation</b>	<b>All Visitors %</b>	<b>V1 %</b>	<b>V2 %</b>
Hotel	30.6	48.6	24.2
Relatives	45.5	17.1	55.6
Other	23.9	34.3	20.2

The survey results show that almost half (45.5%) of all out of town respondents stayed with relatives while in Winnipeg. When the visitor population is split into the two sub-groups some difference between the two can be discerned. A larger percentage of group V1, visitors who came specifically for the Festival, stayed in hotels than did either visitors from the second group or all visitors. Over half (55.6%) of the visitors from the second group, V2, stayed with relatives.

Those visitors indicating they had been staying in a hotel were asked to specify the name of the hotel. This information made it possible to divide the hotels named into two groups; hotels in or near the downtown and hotels found elsewhere. Table 3 describes this information.

**TABLE 3**  
**Hotel Location**

<b>Location</b>	<b>#</b>	<b>%</b>
Downtown	11	64.7
Elsewhere	6	35.3
Total	17	100.0

Almost two thirds (64.7%) of the hotels used by visitors were located downtown. The sub-group of respondents staying in hotels can be distinguished by whether they had stayed downtown or not. A full 75% of visitors staying in hotels stayed downtown.

Visitors were also asked to identify their reasons for coming to Winnipeg, and were asked if they had come specifically for the Festival or not. It is through this question that the visitor population is broken down into V1 and V2. Table 4 displays the results of this question.

**TABLE 4**  
**Reasons for Coming to Winnipeg**

Reason	#	%
Specifically for the Fringe Festival	38	27.0
Planned trip to coincide	24	17.0
Just happened to be in Winnipeg	79	56.0
<b>Total</b>	<b>141</b>	<b>100.0</b>

Over one quarter (27.0%) came to Winnipeg specifically for the Fringe Festival. A further 17% planned their trip to Winnipeg to coincide with the Festival. The remaining 56% said they happened to be in Winnipeg at the time of the Festival and decided to attend.

The next survey question dealt with the mode visitors used in travelling to Winnipeg. Table 5 displays the results of this question.

**TABLE 5**  
**Mode of Transportation Used by Visitors**

Mode	All Visitors %	V1 %	V2 %
Plane	24.3	5.4	31.1
Train	5.0	0.0	6.8
Bus	6.4	10.8	4.9
Car	62.1	81.1	55.3
Other	2.1	2.7	1.9

In each of the three groups a large percentage used automobiles in travelling to Winnipeg. In particular, a very large percentage (81.1%) of visitors travelling to Winnipeg specifically for the Fringe Festival used automobiles. This extensive use of automobiles would indicate that a large number of visitors came to Winnipeg from some other part of Manitoba or from another prairie province, Ontario or one of the northern states. This is likely because these areas are within comfortable driving distance to Winnipeg.

The next two questions dealt with the length of a visitor's stay and if the Fringe Festival had caused visitors to lengthen their stay. Tables 6 and 7 describe the results of these questions.

**TABLE 6**  
**Average Anticipated Length of Stay in Winnipeg**

<b>Group</b>	<b>Length of Stay (days)</b>
All Visitors	9.7
V1	6.8
V2	10.7

**TABLE 7**  
**"Has the Fringe Festival Affected the Length of Your Stay?"**

<b>Group</b>	<b>Yes %</b>	<b>No %</b>
All Visitors	37.1	62.9
V1	63.6	36.4
V2	28.3	71.7

The average anticipated stay for all visitors was almost ten days (9.7 days). As well, 62.9% of all visitors said that the Festival did not affect the length of their stay. The examination of these same variables for the two sub-groups of visitors reveals some differences. The average length of stay for visitors who came to Winnipeg specifically for the Festival (V1) was shorter than that of visitors who came primarily for other reasons (6.8 days and 10.7 days respectively). When asked if the Festival had affected the length of their stay, 63.6% of V1 visitors said it had and 28.3% of V2 visitors indicated the length of their stay had been changed. It would seem that visitors who come to Winnipeg specifically for the Festival spent less time in Winnipeg on average, than the full nine days of the Festival. This may be a result of visitors who live near the city coming in to attend the Festival on the weekend.

### 3.3 All Patrons

A series of nine questions were asked of all patrons to gather information on:

- a) the number and type of performances they attended,
- b) how they heard about the Festival,
- c) whether they attend theatre regularly,
- d) the size and composition of their party,
- e) their age,
- f) their income, and
- g) what general comments they had regarding the Festival.

Table 8 describes the average total number of shows patrons had seen and/or were planning to see, by sub-group. The average for all respondents was 4.9 shows. Winnipeggers indicated that they would see an average of 5.0 shows, for all visitors generally it was 3.9 shows, and for the two sub-groups of visitors, V1 and V2, the figures were 5.0 and 3.5 shows respectively.

**TABLE 8**  
Average Number of Shows Seen

Group	Shows
All Respondents	4.9
Winnipeggers	5.0
All Visitors	3.9
V1	5.0
V2	3.5

The respondents were then asked what type of show they had seen or intended to see. The answers to this question are displayed in Table 9.

**TABLE 9**  
Type of Show Seen/Intended to See

Show Type	All	Winnipeggers	All	V1	V2
	Respondents	%	Visitors	%	%
	%	%	%	%	%
Comedy/Drama	21.3	20.5	25.8	13.5	30.5
Comedy/Drama & Mature	21.0	21.1	20.5	18.9	21.1
Comedy/Drama & Musical & Mature	20.6	20.5	21.2	29.7	17.9
Comedy/Drama & Musical	10.5	11.0	7.6	2.7	9.5
All	10.8	10.8	11.4	24.3	6.3
Other	15.8	16.1	13.5	10.9	14.7

These results were somewhat ambiguous. The show categories in Table 9 are not all that were returned, but they do include all that measured a significant proportion of the sample. As well, three of the categories are combinations of the "Comedy/Drama" category, the "Mature" category and the "Musical" category. The fact that the category of Comedy/Drama was chosen, either in combination with another category or alone the majority of the time does indicate that this is the type of show most patrons find entertaining. The obvious problem with data from this question lies with the fact that, for the patron, show "categories" would not easily correspond to the show he or she might be seeing. One may not be able to differentiate between a "comedy" and a "mature" show. However, the fact that 73.4% elected "comedy/drama" indicates a demand on the part of patrons for that type of show.

The next question asked all respondents "How did you hear about the Fringe Festival?" The responses to this question are recorded in Table 10. Again, there were more options available, in terms of categories to choose from, than are shown in the table and, once more, combinations of categories were accepted.

**TABLE 10**  
**Sources of Information About the Festival**

Source	All Respondents %	Winnipeggers %	All Visitors %	V1 %	V2 %
Friends/Relatives	28.9	27.5	35.9	31.6	39.4
Friends/Relatives & Ads	15.3	15.2	15.2	10.5	17.2
Newspaper Ads	13.8	14.4	10.3	7.9	11.1
Other than Ads & Friends	18.0	18.0	20.0	44.7	8.1

The results of this question should be of considerable interest to Festival organizers considering that advertising for such an event is crucial. For all patron-types, friends and/or relatives were considered to be the main source of information about the Festival, either alone or in combination with advertisements. This was not as true for Winnipeggers, who would have had the benefit of local advertisement, as it was for visitors. Nevertheless, an argument may be made for more extensive advertising in the future even though the attendance greatly exceeded that which was anticipated by festival organizers.

All patrons surveyed were asked if they attend theatre regularly. The responses to this question are displayed in Table 11.

**TABLE 11**  
**Do You Regularly Attend Some Form of Theatre?**

	All Respondents %	Winnipeggers %	All Visitors %	V1 %	V2 %
Yes	65.9	65.0	70.8	76.3	68.7
No	34.1	35.0	29.2	23.7	31.3

Not surprisingly, the proportion of visitors coming to Winnipeg specifically for the Fringe Festival (V1) who regularly attended some form of theatre was larger than that of any other group. Patrons from Winnipeg represented the smallest percentage (65.0). Inversely, the proportion of respondents overall who do not attend theatre regularly was over one third

(34.1%). This is a strong endorsement for the Festival's ability to attract those who may otherwise not attend theatre.

The next two questions asked respondents about the people they may have come to the Festival with. Tables 12 and 13 describe the size and composition of the parties attending the Festival.

**TABLE 12**  
**Average Size of Party**

	<b>All Patrons</b> %	<b>Winnipeggers</b> %	<b>All Visitors</b> %	<b>V1</b> %	<b>V2</b> %
Average Size	2.8	2.6	3.8	7.4	2.4

**TABLE 13**  
**Composition of Party**

<b>Party Type</b>	<b>All Patrons</b> %	<b>Winnipeggers</b> %	<b>All Visitors</b> %	<b>V1</b> %	<b>V2</b> %
Family	25.5	23.6	35.7	32.4	37.8
Friends	51.7	52.8	44.8	56.8	40.8
Individual	21.0	21.6	18.2	10.8	20.4
Family and Friends	1.8	2.0	1.4	0.0	1.0

The size of an average party attending the Fringe Festival was just under three people. The group which again stands out is V1. The average size of a party of visitors who came specifically for the Festival is 7.4. When the raw data is examined, it is found that there are eight respondents who indicate they are part of a party of 23 or more. It was speculated that this represented bus tours from out of town. However, when the variable measuring how visitors travelled to Winnipeg was examined it was found that, of the eight respondents six came by car, only one came by bus and the eighth did not indicate how he/she arrived. Therefore it can be surmised that the large parties were organized in Winnipeg after the visitors arrived.

The next two questions measured the age and income level of the respondents. Tables 14 and 15 describe the results of these questions.



**TABLE 14**  
**Age of Patrons**

<b>Age</b>	<b>All Patrons %</b>	<b>Winnipeggers %</b>	<b>All Visitors %</b>	<b>V1 %</b>	<b>V2 %</b>
<25	29.4	29.3	29.7	42.1	26.0
25-40	45.3	46.4	37.9	26.3	44.0
41-50	15.0	14.3	19.3	21.1	18.0
51-60	7.6	7.4	9.7	10.5	8.0
60+	2.7	2.6	3.4	0.0	4.0

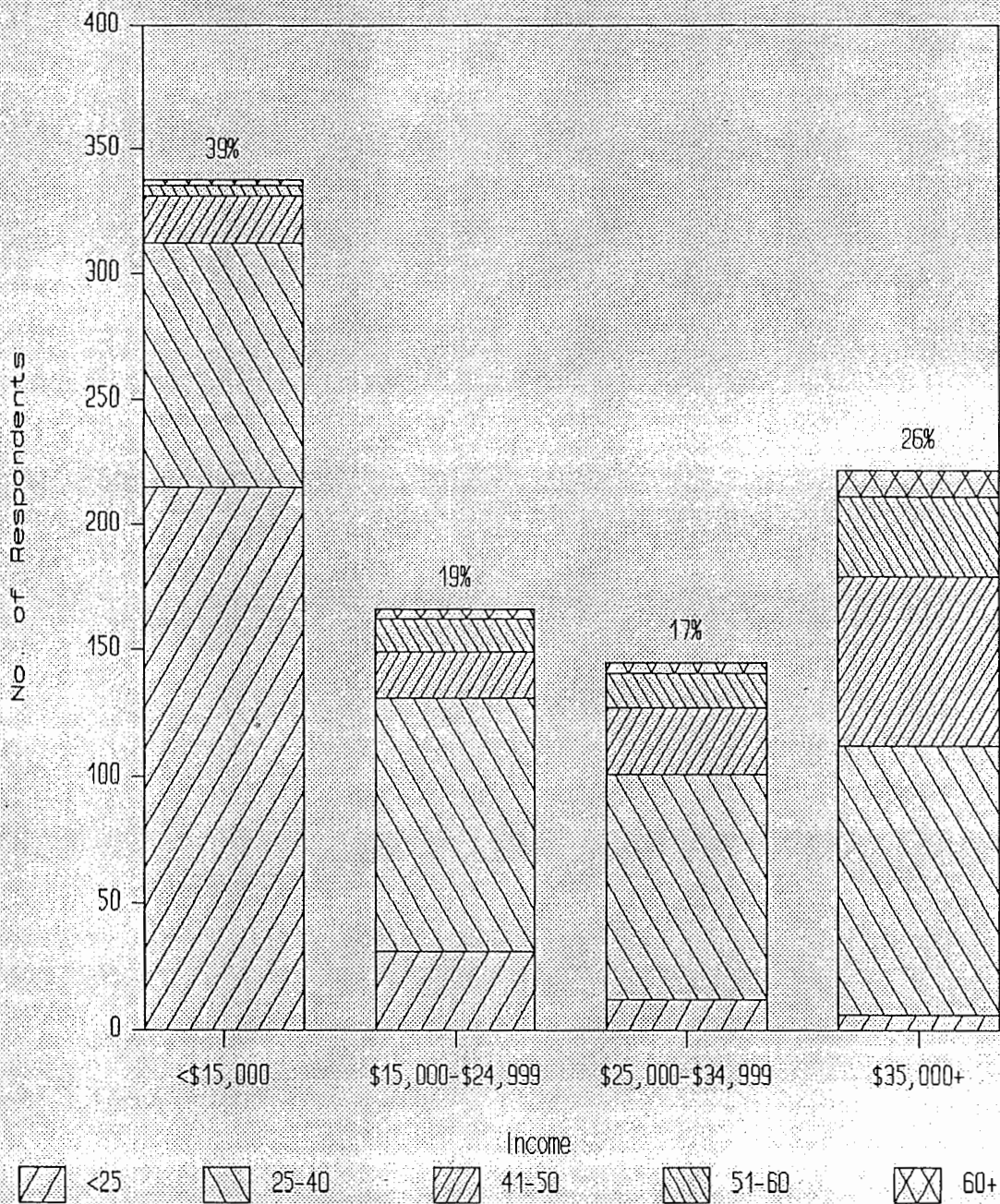
**TABLE 15**  
**Income of Patrons**

<b>Income \$</b>	<b>All Patrons %</b>	<b>Winnipeggers %</b>	<b>All Visitors %</b>	<b>V1 %</b>	<b>V2 %</b>
<15,000	38.5	38.2	39.4	52.6	35.4
15,000-24,999	19.2	19.6	16.9	15.8	17.2
25,000-34,999	16.5	16.9	14.8	10.5	16.2
35,000+	25.8	25.3	28.9	21.1	31.3

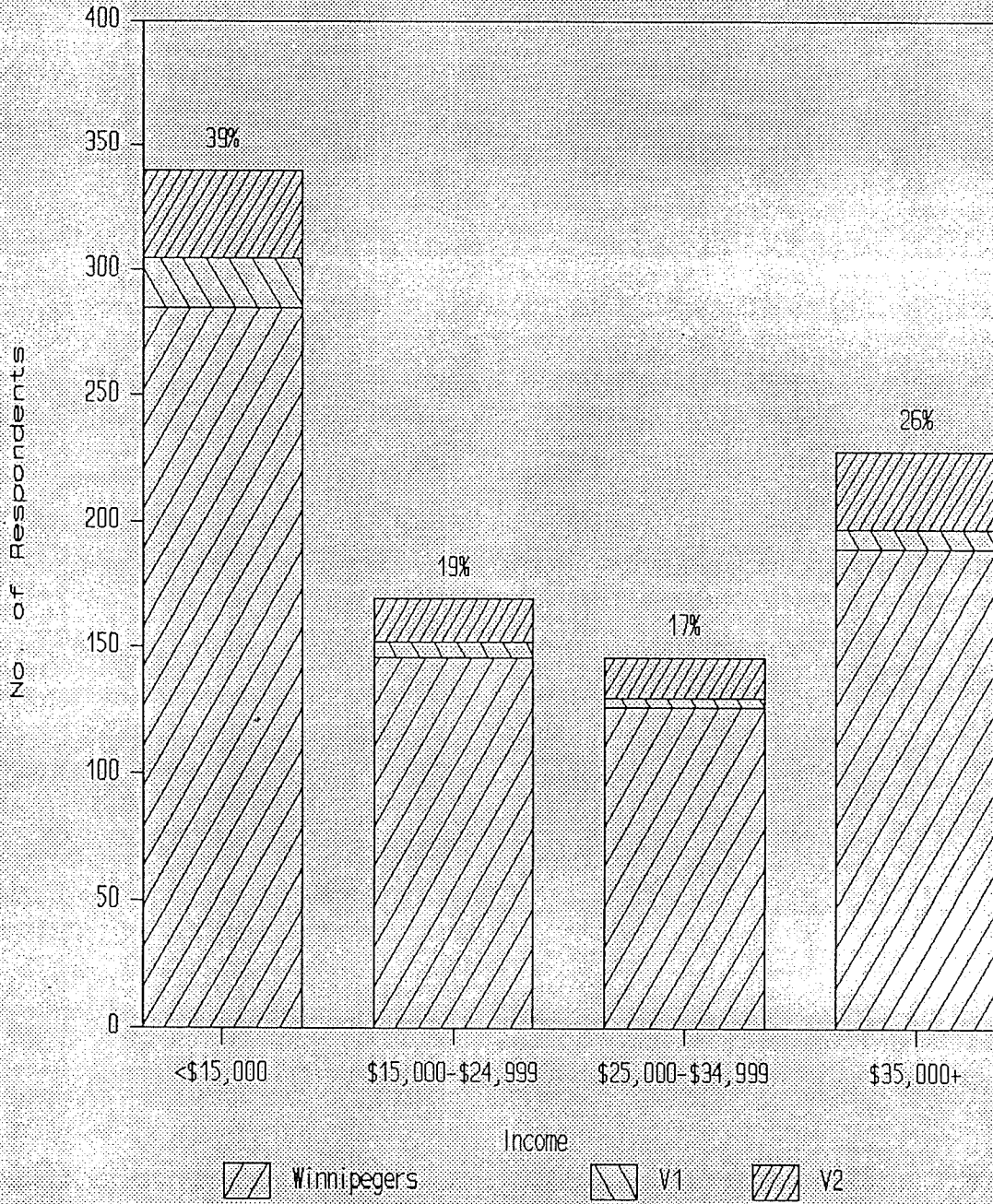
These two questions may tell the most about the type of patrons attracted to the Fringe Festival. According to the figures in Tables 14, persons under 40 years old made up over 60% of each of the groups measured, and almost 30% of respondents were less than 25 years old. As well, 10.3% were over 50 years old. Table 15 shows that, for almost all of the group-types, close to 60% of the respondents had incomes less than \$25,000 and in the V1 patron-type group almost 70% (68.4%) had incomes less than \$25,000. These percentages are reflected in Figures 1 and 2, which show income by age group for all patrons and income by patron-type. Overall, these figures illustrate that the Fringe Festival can, and did, attract a wide variety of people, crossing age barriers and income levels. This has some important implications for future festivals.

Considering the large number of patrons with incomes less than \$15,000, the maintenance of low admission fees will allow these people continued access to the performances.

**FIGURE 1**  
**Income**



**FIGURE 2**  
**Income by Patron-Type**



Even though the majority of festival-goers were under the age of 41, significant numbers of people of all ages attended the Festival. Because of this, performances, advertising and special services should be broadened or introduced to provide for more elderly patrons. Increasing its popularity with this burgeoning element of the population while continuing to attract the younger audiences will secure the Festival's long term success.

The final question asked of all patrons was "Do you have further comments regarding the Fringe Festival?" As all survey questions of this kind do, this question resulted in an enormous number of different answers. However, the two most popular answers were "the Festival was great" and "I hope it will become an annual event."

The results of this question, and those of the survey overall, indicate that the Festival was a success and should be repeated annually.

#### **3.4 Patron Expenditure at the Fringe Festival**

The first step in determining patron expenditure was to arrive at a figure which roughly approximated the actual attendance at the Festival. To do this it was necessary to determine the number of tickets sold to all of the shows. This was done by dividing the amount of money paid to indoor venue performers, \$64,000, by the approximate average cost of a ticket, \$4. The figure of \$4 is likely close to the average, as almost all tickets were \$5 and tickets for some shows were \$3 or less. This results in a figure of 16,000 tickets sold. This number was then divided by the average number of shows seen by each patron. Table 16 displays the method used to determine the average number of shows attended and subsequently the attendance. The proportion each group made up of the total respondent population was described as a percentage (A). This was multiplied by the average number of shows seen for each group (B). The resulting figures were summed to produce the overall average number of shows seen (C). The total number of tickets sold at indoor venues was divided by this to produce the attendance figure of 3,306.

**TABLE 16**  
**Calculation of Indoor Venue Attendance**

Group	n	(A) %	(B) Average # of Shows	(AxB)
Winnipeggers	822	85.36	5.0	4.27
V2	103	10.70	3.5	0.37
V1	38	3.95	5.0	0.20
				<b>4.84 (C)</b>

$$\begin{array}{rcl} \text{Total Tickets Sold} & / & \text{Average \# of shows seen} = \text{Attendance} \\ 16,000 & / & 4.84 = 3,306 \end{array}$$

The next step is to determine the average amount spent by each person attending the Festival. In order to retrieve the necessary data each respondent was asked to record the amount he or she spent while at the Fringe Festival. Winnipeggers were asked to only record the amount spent in the vicinity of the Festival for food, transportation, entertainment (other than Festival shows) and other expenditures. Visitors were asked to record separately the amounts spent in the vicinity of the Festival and elsewhere for food, accommodation, transportation, clothing, entertainment (other than Festival shows) and other expenditures.

These data were divided according to the three patron-type groups; Winnipeggers, V1 and V2. The V1 data were also divided into two as both expenditures in the vicinity of the Festival and elsewhere were included in the computations, whereas for the V2 Group only expenditures in the vicinity of the Festival were included. This is because the V2 patrons did not travel to Winnipeg specifically for the Fringe Festival (as did the V1 patrons) so any expenditure away from the Festival must be assumed to be unrelated. However because the V1 patrons came only because of the Festival all their expenditures are valid. Table 17 describes the mean expenditures of the survey respondents.

**TABLE 17**  
**Mean Patron Expenditures**

Category	Winnipeggers	V2	V1 (vicinity)	V1 (elsewhere)	Total
Food	\$12.56	\$19.72	\$63.95	\$38.13	\$134.36
Accommodation	\$0.00	\$12.19	\$16.90	\$21.87	\$50.96
Transportation	\$3.20	\$3.30	\$10.74	\$10.00	\$27.24
Clothing	\$0.00	\$2.98	\$27.21	\$3.16	\$33.35
Entertainment	\$4.60	\$8.51	\$10.40	\$3.11	\$26.62
Other	\$4.23	\$7.33	\$7.90	\$9.08	\$28.54
<b>Total</b>	<b>\$24.59</b>	<b>\$54.03</b>	<b>\$137.10</b>	<b>\$85.35</b>	<b>\$301.07</b>

The total mean expenditure for each group was then applied to the attendance to produce the estimated patron expenditure.

**TABLE 18**  
**Estimated Patron Expenditure**  
**(indoor venues)**

Group	N	A %	B Attendance	C (AxB)	D Mean Expenditure \$	(CxD) Total Expenditure \$
Winnipeggers	822	85.35	3,306	2,822	24.59	69,393.34
V2	103	10.70	3,306	354	54.03	19,105.56
V1	38	3.95	3,306	130	222.45	29,020.41
<b>Total</b>	<b>963</b>	<b>100.00</b>		<b>3,306</b>		<b>117,519.31</b>

In Table 18 the number of patrons in each group (N) is converted to a percentage (A) which is then multiplied by the total attendance (B) to generate C, the estimated number of actual patrons in each group. This number is multiplied by the mean expenditure for each group (from Table 17) to produce the total expenditure for each patron group. The sum of these numbers, \$117,519.31, is the estimated patron expenditure for the Fringe Festival.

### 3.5 Total Economic Benefit

The expenditure by patrons would only be one part of the total economic benefit of the Festival to the city of Winnipeg. The other components would be:

- expenditures by patrons at outdoor performances
- the expenditures by the Fringe Festival
  - salaries
  - advertising
  - venues
- the expenditures by the performers
  - food, accommodation, etc.
  - props
  - other services
- expenditures by businesses (i.e. food vendors)
  - extra goods/supplies

The total of these would exceed the patron expenditures by a significant degree and perhaps elevate the economic impact to close to \$500,000.

### 3.6 Expenditures by Category

It was possible to determine what percentage of the total patron expenditure could be attributed to a particular category and/or group. Table 19 describes these percentages.

**TABLE 19**  
**Percentage Expenditures by Category**

Category	Winnipeggers	V2	V1 (vicinity)	V1 (elsewhere)	Total
Food	29.43%	5.79%	6.93%	4.13%	46.28%
Accommodation	0.00%	3.58%	1.83%	2.37%	7.78%
Transportation	9.91%	0.97%	1.16%	1.08%	13.13%
Clothing	0.00%	0.88%	2.95%	0.34%	4.17%
Entertainment	10.78%	2.50%	1.13%	0.34%	14.73%
Other	9.91%	2.15%	0.86%	0.98%	13.91%
Total	57.63%	15.87%	14.85%	9.25%	100.00%

Of the \$117,519 spent by patrons, 46.28% of it was on food, 14.73% on entertainment (outside the Fringe Festival), 13.13% on transportation, 7.78% on accommodation and 4.17% on clothing. The biggest expenditure was, of course, made by Winnipeggers who spent 57.63% of the \$117,519, 29.43% on food. The large expenditure on food by all the groups can be explained to some extent by the presence of street vendors in the Market Square area. This proven propensity of Festival goers to spend money on food should be utilized by Festival organizers to increase the role of local business, particularly restaurants, in the important activity peripheral to the Festival.

#### 4.0 BUSINESS SURVEY RESULTS

It is possible to divide the respondent businesses in two ways; by type (restaurant/food, retail, service, wholesale) or by their answer to the question "What affect did the Festival have on your business?" (positive, negative, none). Table 20 describes the type of business surveyed while Table 20 describes the perceived effect the Festival had on business.

**TABLE 20**  
**Business Type**

Type	#	%
Restaurant	25	30.1
Retail	55	66.3
Service	2	2.4
Wholesale	1	1.2
	83	100.0

**TABLE 21**  
**Perceived Effect**

Effect	#	%
Positive	30	36.1
Negative	4	4.8
None	47	56.6
No Response	2	2.4

The overwhelming majority of businesses (96.4) were either retail operations or restaurants and bars. The results of the question on the type of effect the Festival had on business are quite telling when they are examined in light of what was learned in the process of distributing and retrieving the surveys. It was found that, prior to the Festival, most businesses were either not aware that there was to be a Fringe Festival, did not know what the Festival was, or did not know when it was to be held. It must be realized that as 1988 was the first year for Winnipeg's Fringe Festival it had no profile with either the business community or the general population. The survey results show that 56.6% of the respondent businesses said that the Festival had no effect on their business. However, of those which responded either positive or negative, 30 said the Festival had a positive effect compared to 4 who said it had a negative effect.

The remainder of the questions were only applicable to businesses which perceived the Festival as having a positive effect.



Of the 30 businesses which felt the Festival had a positive effect 12 (40%) were restaurants or bars and 18 (60%) were retail businesses. The proprietors of these businesses were asked to describe the nature of the positive effect on their establishments. Table 22 describes the answers to this question.

**TABLE 22**  
**Positive Effects on Business**

<b>Type of Effect</b>	<b>#</b>	<b>%</b>
Window Shopping	5	16.7
Sales	4	13.3
Traffic Inside Store	3	10.0
Traffic & Sales	9	30.0
Traffic & Window Shopping	2	6.7
All	7	23.3
<b>Total</b>	<b>30</b>	<b>100.0</b>

All 30 businesses answered this question and the results indicate that traffic inside the business, window shopping and sales were all seen to improve and many businesses saw impacts in more than one area. Of the 22 businesses which saw an increase in sales 18 indicated the scale of this increase (Table 23). The results show that 6 (33.4%) showed an increase of over 10%.

**TABLE 21**  
**Perceived Effect on Sales**

<b>Increase</b>	<b>#</b>	<b>%</b>
<6%	5	27.8
6-10%	7	38.9
11-20%	2	11.1
21-30%	1	5.6
30%+	3	16.7
<b>Total</b>	<b>18</b>	<b>100.1</b>

The next question asked proprietors if the Fringe Festival increased the public's awareness of his or her business. Of the 28 who answered, 27 (96.4%) said "yes." When asked if the Festival increased the vitality of the area all 30 answered and 29 (96.8%) said "yes." The results were identical when businesses were asked if the Fringe Festival should be a regular event, 29 out of 30 (96.7%) said "yes."

All businesses were asked to contribute additional comments. The results from the question mirror those of the additional comments received from the patrons. The largest percentage answered that the Festival should be an annual event and the next largest group responded that the Festival was an enjoyable event.

The high number of returns (83) produced results which have important implications for Festival organizers. These are that:

- 1) businesses in the community do support the idea of a Fringe Festival and hope it is made an annual event,
- 2) the festival **did** have a positive effect on sales
- 3) there is definitely room for increased dialogue between future Festival organizers and local business leading to an increased role for business in the activity surrounding the Festival.

## 5.0 THE WINNIPEG AND EDMONTON FRINGE FESTIVALS: A COMPARISON

During the 1984 Edmonton Fringe Festival, the third such festival in that city, a survey was conducted similar to that conducted in Winnipeg during its first Fringe Festival. The following is a comparison of the results of the two surveys.

**TABLE 24**  
**Comparison of The Edmonton (1984) and Winnipeg (1988)**  
**Fringe Festivals**

Variable	Edmonton (1984)	Winnipeg (1988)
N	976	963
Tickets Sold and Estimated Outdoor Attendance	30,000	29,889
Performances	500	270
Average Shows/Person (indoor venues)	5	4.9
% Patrons from Host City	90.0%	85.4%
Average Associated Expenditure Per Patron	\$15.29	\$35.46
Associated Expenditure/Ticket Sales	1.88	1.84
Age	85% <45 years	45.3% <40 years

The survey results are remarkably similar. The first similarity is found in the number of patrons surveyed (N). In Edmonton 973 were surveyed and in Winnipeg the number was only 10 less at 963. In terms of the volume of theatre, Edmonton Festival in its third year was about twice the size of Winnipeg in its first. Despite this, attendance at the two events was comparable which implies a higher ticket sales to performance ratio for the Winnipeg festival.

In terms of the number of shows seen per patron, the numbers are substantially closer. In Edmonton the average patron saw 5 shows, while in Winnipeg the average patron saw 4.9 shows, a negligible difference.

In Edmonton 90.0% of the patrons were from that city, while in Winnipeg, 85.4% were residents. This difference may be attributed to the popularity of the Edmonton Festival which may have provided the Winnipeg Festival with a ready-made out-of-province audience.

In terms of the associated expenditures by the patrons of each festival the numbers were quite different. In Edmonton in 1984 the average expenditure per patron was \$15.29. For Winnipeg in 1988 the average expenditure was more than twice that of Edmonton in 1984 at \$35.46. Even accounting for inflation this difference is remarkable. A few possible explanations may be the presence of food vendors at the Winnipeg site (as 47.4% of the

associated expenditure was on food) or the fact that an extra 4.6% of Winnipeg patrons were from out of town and would have higher expenditures.

Interestingly, the associated expenditure/ticket sales ratios for the two events were almost identical. Edmonton's ratio was 1.88 while Winnipeg's was 1.84.

Both festivals drew generally young crowds, however the audience in Edmonton in 1984 was particularly young with 85% under 45 years. In Winnipeg, in 1988, the audience was more varied in age with 45.3% less than 40 years old and 10.3% over 50 years.

The experience of the Fringe Festival in Winnipeg seems to have paralleled Edmonton's to some degree. Lessons learned regarding the administration of such an event are, and should be, transferrable between host cities.

## 6.0 CONCLUSIONS

- 1) The Fringe Festival met its goal of making theatre accessible to those who usually do not attend. 34.1% of patrons indicated that they do not attend theatre regularly. Additionally, 45.3% were less than 40 years old and 57.7% had incomes of less than \$25,000. It is important that Festival organizers strive to maintain the low admission fees in order to keep the performances accessible to the lower income patrons. As well, organizers should work to expand the popularity of the Festival among the older age groups. This could be done through performances geared to this group, the introduction of special services (transportation between venues) and advertising targeted to the elderly. Broadening the patron population will serve to secure the Festival as a Winnipeg fixture.
- 2) The Festival had a positive effect on the city, and on the Market Square area in particular. Patrons and businesses alike felt the Festival was a success and it should become an annual event.
- 3) The Festival had a positive economic effect on the city. Approximately \$117,519 was generated by patron spending in addition to the Festival ticket sales. Other factors, including expenditures by the Fringe Festival, theatre companies and effected business, would likely push the total economic impact of the Festival close to \$500,000.
- 4) A broader, more extensive advertising campaign for future festivals would expand the profile, and build on the success of the first Fringe Festival. It is clear from the results of both surveys that the advertisements for the Festival failed to reach a large proportion of patrons (46.9% of all patrons and 45.5% of Winnipeggers heard about the Festival from sources other than advertisements) and most business. Advertising earlier and through a number of different channels would inform potential patrons (in Winnipeg and elsewhere) and businesses, allowing the former to make arrangements to attend and the latter to prepare for the increased activity the Festival would bring.
- 5) In terms of associated expenditure by patrons, food accounted for a greater percentage of the dollars spent than any other type of expenditure. This may be due to the proximity of food vendors on site, or it may indicate a pattern of spending which could be capitalized on by providing more food concessions.
- 6) The patron survey indicated that comedy/drama performances were the most popular. Over 73% of all respondents chose the comedy/drama category as the type of show they

would like to see. This indication of preference should be taken into account when future Festivals are planned.

- 7) There was a general acceptance of and overall enthusiasm for the Festival by the local businesses. This exposes an opportunity to broaden the activity in the vicinity of the Festival or even coordinate with the proprietors of local shops and restaurants.

APPENDIX I

**FRINGE FESTIVAL SURVEY FORMS**

PLEASE FILL OUT THIS SURVEY ONLY ONCE. THANK YOU.

## FRINGE FESTIVAL PATRON SURVEY

Circle the number next to your answer

1. Are you from Winnipeg?

1) Yes (skip to question 8)

2) No

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### Out-of-Towners Please Answer Questions 2-7

2. Where are you staying?

(Please circle one)

1) Hotel (please specify) \_\_\_\_\_

2) Relatives/Friends

3) Other (please specify) \_\_\_\_\_

3. Did you.....

1) ..come to Winnipeg specifically because of the Festival?

2) ..intend on coming to Winnipeg anyway but arranged to come during the Festival?.

3) ..just happen to be in Winnipeg during the Festival?

4. How did you get to Winnipeg?

1) Plane

2) Train

3) Bus

4) Car

5) Other

5. Approximately, how much money do you think you will spend on the following and where will you spend it?

	<u>Vicinity of the Festival</u>	<u>Elsewhere in Winnipeg</u>
1) Food	\$ _____	\$ _____
2) Accommodation	\$ _____	\$ _____
3) Transportation	\$ _____	\$ _____
4) Clothing	\$ _____	\$ _____
5) Entertainment other than the Festival	\$ _____	\$ _____
6) Other	\$ _____	\$ _____

6. How long do you plan to stay in Winnipeg? \_\_\_\_\_ (days)

7. Has the Fringe Festival affected the length of your stay in Winnipeg?

1) Yes

2) No

(over)

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### Winnipeggers please answer question 8

8. If you are a resident of Winnipeg, how much do you think you will spend at the Fringe Festival?

1) Food	\$ _____
2) Transportation	\$ _____
3) Entertainment other than the Festival.	\$ _____
4) Other	\$ _____

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(over)







**FRINGE FESTIVAL BUSINESS SURVEY**

1. What overall effect did the Fringe Festival have on your business?

- 1) Positive
- 2) Negative
- 3) None

**IF THE FESTIVAL HAD A NEGATIVE EFFECT, what was that effect?**

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**IF THE FESTIVAL HAD A POSITIVE EFFECT,**

1. The Festival increased: (circle as many as needed).

1) Traffic inside the place of business

2) Window shopping

3) Sales - If so by how much

- 1) below 6%
- 2) 6-10%
- 3) 11-20%
- 4) 21-30%
- 5) over 30%

4. If there was increased traffic in your place of business was it due to people from:

- 1) Winnipeg
- 2) Out of town
- 3) Both
- 4) Don't know

4. Did the Festival improve the image or increase awareness of your business?

- 1) Yes
- 2) No

5. Did the Festival increase the vitality of the area?

- 1) Yes
- 2) No

6. Should the Fringe Festival be a regular/annual event?

- 1) Yes
- 2) No

**COMMENTS:**

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**Thank You For Your Cooperation**