



PrideFEST 2022

IMPACT ASSESSMENT



**Culture
Counts**

Acknowledgements

This report has been prepared by Nicole Tan Emery, Jordan Gibbs, Jamie McCullough and Shannon Pearse of Culture Counts. We would like to thank PrideWA for their support through the development and delivery of the evaluation project. We would also like to thank all stakeholders including public patrons, artists, volunteers and staff for their participation in this project.

Pride WA would like to acknowledge that PrideFEST programs are held on multiple Aboriginal lands throughout beautiful Western Australia. We would like to pay our respects to Elders both past, present, and emerging. We extend our respect, friendship, and support to Nyoongar people especially those within our community and to all other Aboriginal and Torres Strait Islander people.

Date of Preparation: February 2023

Cover page photo credit: Keith Mitchell

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Introduction

PrideFEST 2022

PrideFEST is Western Australia's premier lesbian, gay, bisexual, transgender, queer, intersex (LGBTQIA+) arts, cultural and community festival. The annual event is presented by volunteer-led organisation, Pride WA. The theme for PrideFEST 2022 was SHINE, marking the aim of the 2022 event to showcase global and popular Australian personalities alongside home-grown local talent and community groups so that the WA LGBTQIA+ community could SHINE on the world stage.

The 2022 Festival ran in venues across the city from 4 to 27 November, with both of its popular hallmark events - Fairday and the Pride Parade. The much-loved Parade returned to the streets of Northbridge for the first time in three years, due to COVID restrictions impacting plans in previous years.

The 2022 Festival program recorded over 76,600 attendees and generated a direct economic impact of over \$4.3 million. This total expenditure as a direct result of PrideFEST also benefits a range of sectors as it flows through the economy, the multiplied economic impact for the 2022 Festival was estimated to be \$12.4 million.

These results mark one the strongest impact performances yet by the PrideFEST, with continued opportunity for it to keep growing in the future.

Scope of Evaluation

The evaluation framework applied by Culture Counts uses a standardised set of outcome metrics called 'dimensions' to measure the quality and impact of cultural events. They have been developed through extensive work with the sector, internationally tested and academically validated.

Coupled together with other quantitative and qualitative indicators, these metrics are combined into an overall evaluation framework that seeks to report back against the organisational and strategic goals of Pride WA and its stakeholder.

Attendees at the Pride Parade, Fairday and a selection of other key PrideFEST events, were invited to respond to a survey about their experience. Surveys included a set of dimensions that were selected in alignment with Pride WA's strategic goals. These are outlined in the following table.

Survey respondents moved a slider to indicate the extent to which they agreed or disagreed with the dimension statement using a sliding scale, labelled 'Strongly Disagree' on the left, to 'Strongly Agree' on the right. The resulting data is used to measure the unique cultural, social, economic, and quality outcomes of PrideFEST.

PrideFEST 2022 Dimensions

OUTCOME AREA	DIMENSION	DIMENSION STATEMENT
Culture	Content	It reflected a broad and inclusive range of voices
Social	Safe	It made me feel safe and welcome
Social	Connection	It helped me to feel connected to people in the community
Economic	Diversity	It engaged people from different backgrounds
Quality	Local impact	It's important that it's happening here
Quality	Cultural contribution	It provides an important addition to the cultural life of the area

Pride WA measured a number of these metrics as part of the 2019, 2020, 2021 and 2022 evaluations, allowing for progress to be tracked over time. A year-on-year analysis is showcased on page 11 of this report.

Data was collected by a survey fieldwork team at a selection of PrideFEST events and activities. Randomised sampling of attendees was undertaken by the Culture Counts fieldwork team so as to capture a representative and accurate understanding of attendee feedback and sentiment. A summary view of the data collection approach is presented in the following table.

Data Collection Methodology

EVENT	GROUP	DATA COLLECTION METHODOLOGY	SAMPLE SIZE
PrideFEST Fairday	Attendees	On-site Assisted Surveys	151
PrideFEST Parade	Attendees	On-site Assisted Surveys	363
	Attendees	Online	19
Other Events and Programs*	Attendees	On-site Assisted Surveys	80
TOTAL			613

* Includes PrideFEST & Pride Piazza Opening and The Great PrideFEST Bake-Off.

Note: On-site assisted surveys were collected by Culture Counts' fieldwork team at the events. Online surveys were sent via email to attendees who registered their email at the event with the Culture Counts fieldwork team, prior to the event concluding.



"Really enjoyed every aspect of the event. Very well organised. The vibe was awesome. So good to feel the community supporting the LGBTQIA+ community. Big thank you to everyone."

- Parade attendee

Photo Credit: Luke Riley

2.0

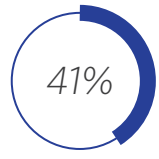
PrideFEST 2022 Highlights

76,600 
ATTENDEES

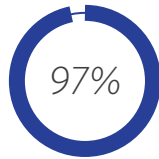
58 
EVENTS

\$4.3 million 
DIRECT ECONOMIC IMPACT

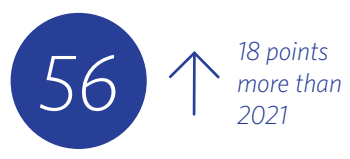
\$12.4 million 
MULTIPLIED ECONOMIC IMPACT



41%
First Time Attendance
Percentage of attendees or participants that engaged with PrideFEST for their first time



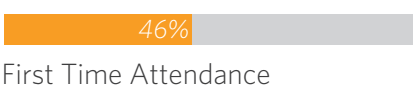
97%
Overall Experience
Percentage of attendees that rated their PrideFEST 2022 experience as "Good" or "Excellent"



56 ↑ *18 points more than 2021*
Net Promoter Score (NPS)
NPS is a measure of loyalty and engagement, with a score above 50 considered to be excellent

FAIRDAY
Sunday 13 November 2022

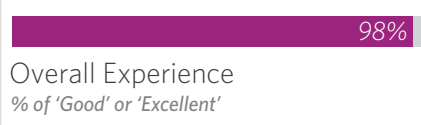
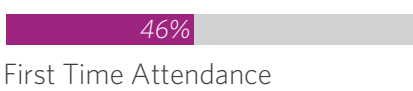
37,000
Attendees



Net Promoter Score

PRIDE PARADE
Saturday 26 November 2022

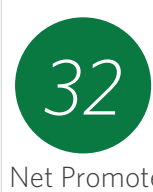
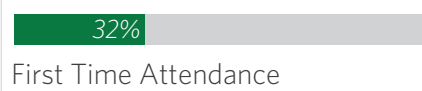
30,500
Attendees



Net Promoter Score

OTHER EVENTS AND PROGRAMS

9,100
Attendees



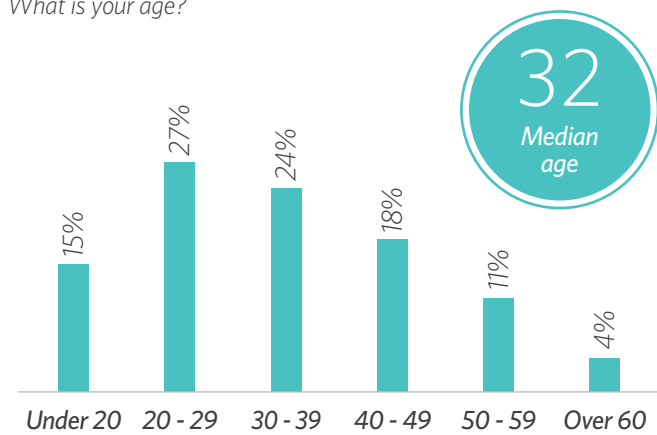
Net Promoter Score

3.0

Audience Profile

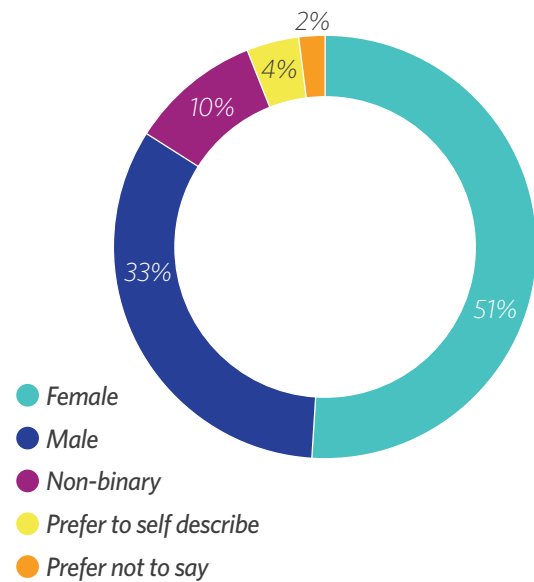
AGE

What is your age?



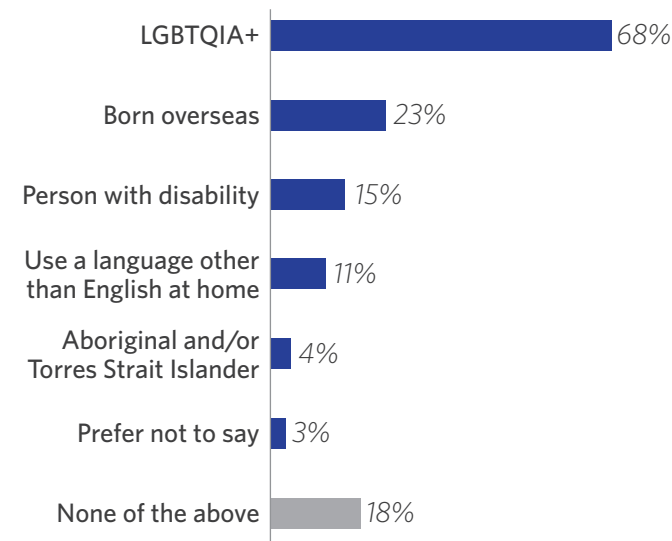
GENDER

How would you describe your gender?



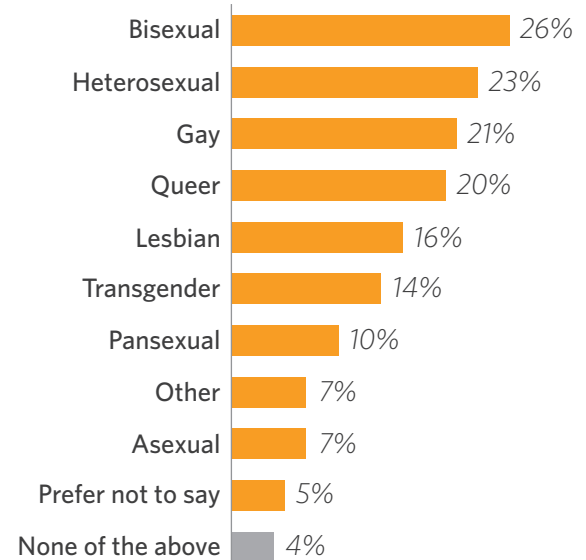
IDENTITY

Do you identify with any of the following?



SEXUALITY

Which of the following best describes you?



Respondent count by postcode
(% of WA respondents)



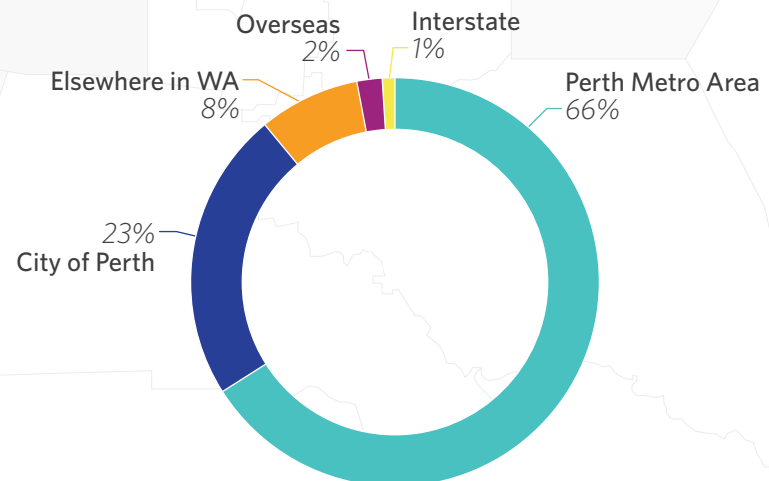
SUBURB

In which suburb do you live?

- Perth (6000) - 5%**
- Maylands (6051) - 3%**
- Cannington (6107) - 3%**
- East Vic Park (6101) - 3%**
- Morley (6062) - 3%**
- East Perth (6004) - 2.5%**
- Armadale (6112) - 2%**
- Mount Lawley (6050) - 2%**
- Kwinana (6167) - 2%**
- Cloverdale (6105) - 2%**

LOCATION

Which of the following best describes where you live?





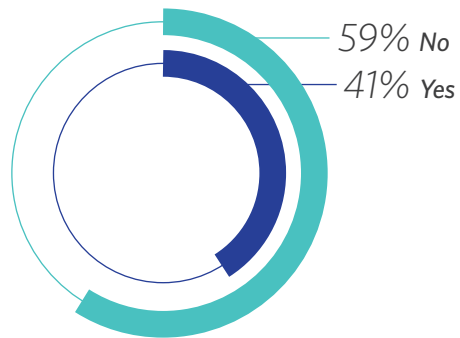
Attendance

PrideFEST survey respondents were asked several questions about their prior attendance and their motivations for attending PrideFEST events. This information helps organisers understand visitor behaviour and the ability of Pride WA to attract new audiences. 41% of respondents attended PrideFEST for the first time in 2022, with 46% of Parade respondents being first-time attendees of PrideFEST. Equally, 46% of Fairday respondents were also first time attendees at that event, indicating that its new open format is making a significant impact in being able to attract new visitor types to PrideFEST events.

Almost all respondents indicated that their attendance was motivated by their support for the LGBTQIA+ community. A large majority of respondents also said that they were motivated to attend PrideFEST events to be part of their local community and to spend time with friends and family. This finding indicates that PrideFEST continues to play a major social and cultural role in the LGBTQIA+ community from the perspective of attendees.

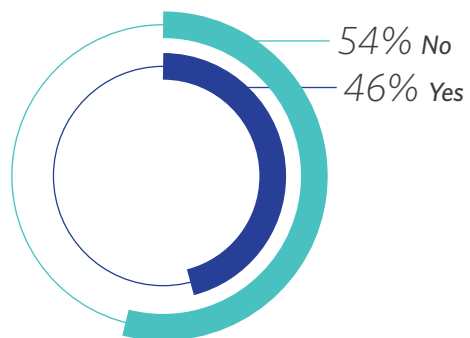
PRIDEFEST

Is this your first time attending a PrideFEST event?



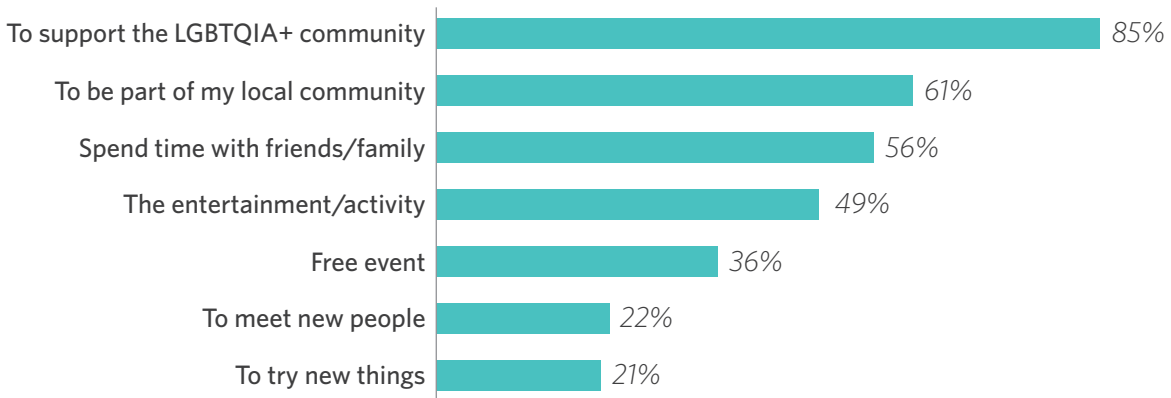
PRIDE PARADE

Is this your first time attending a PrideFEST event?



MOTIVATION TO ATTEND

What motivated you to attend the event today?



4.0

PrideFEST 2022

Outcomes

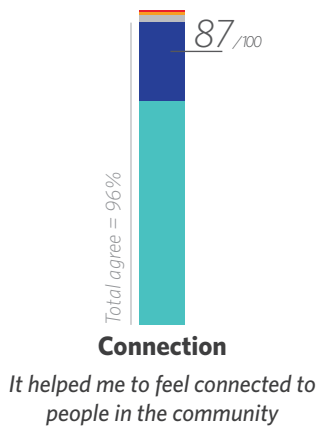
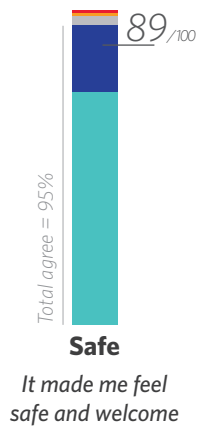
All dimensions measured for PrideFEST achieved very strong results. PrideFEST survey respondents were most likely to agree that the event made them feel connected to others in their community ('Connection'), that it's important that it is happening here ('Local Impact'), and it engaged people from different backgrounds ('Diversity').

The 'Safe', 'Content', and 'Cultural Contribution' dimensions also scored highly, demonstrating that respondents were likely to agree that the event made them feel safe and welcome, it reflected a broad and inclusive range of voices and that PrideFEST is an important contribution to the cultural life of the area.

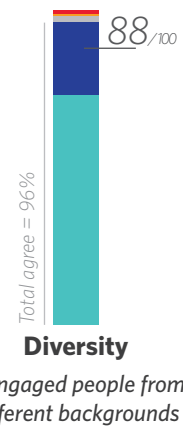
Overall, the response to the outcome metrics was excellent, with all six dimensions measured receiving an average score of 86/100 or more.



SOCIAL OUTCOMES

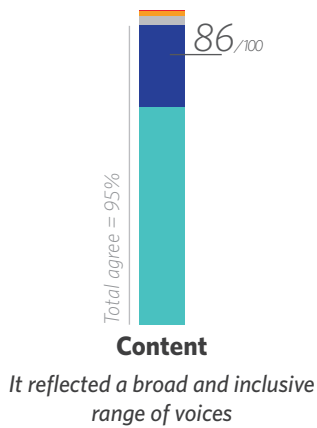


ECONOMIC OUTCOMES

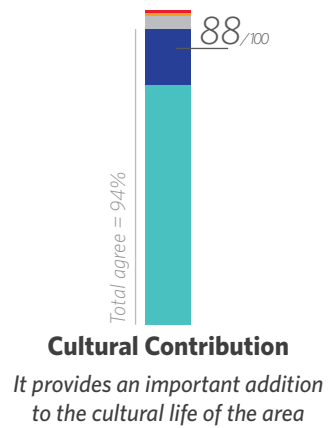
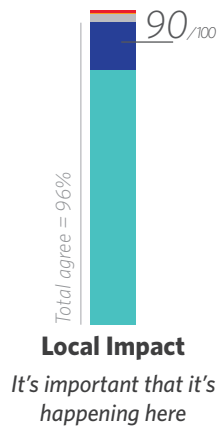


● Strongly Agree ● Agree ● Neutral ● Disagree ● Strongly Disagree — Average

CULTURAL OUTCOMES



QUALITY METRICS



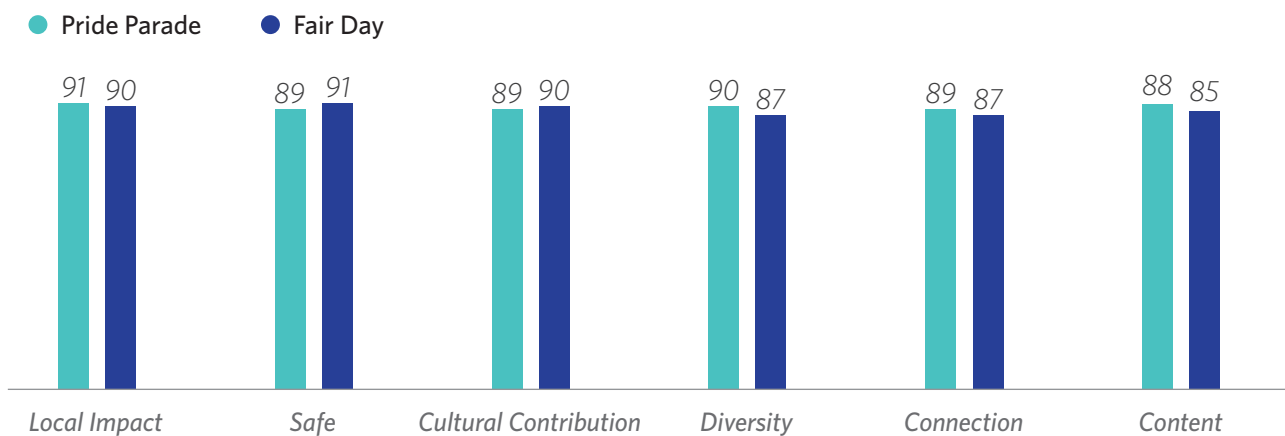
2022 Event Comparison

Dimension results for the two major programs evaluated as part of PrideFEST 2022 were compared in an aim to understand their relative strengths and impacts.

Results trended similarly for most dimensions measured between the two key events. Fairday received stronger feedback regarding the 'Cultural Contribution' and 'Safe' dimensions, whereas the Pride Parade produced stronger levels of agreement for 'Content', 'Connection', 'Diversity', and 'Local Impact.'

The similarity of outcome results between the two major events is very positive and indicates strong management on the part of Pride WA in being able to delivery strong community and cultural outcomes across two very different events from a logistical perspective.

This finding supports and strengthens the understanding that Pride WA and PrideFEST are important social and cultural institutions within the WA LGBTQIA+ community.



Year on Year Comparison

Five dimensions within the evaluation framework have been measured as part of PrideFEST evaluations in 2019, 2020, 2021, and 2022 the below chart shows the average score received for each metric across the four years of evaluation.

It is important to consider the results in 2019 as this was the last year the Pride Parade was held in Northbridge.

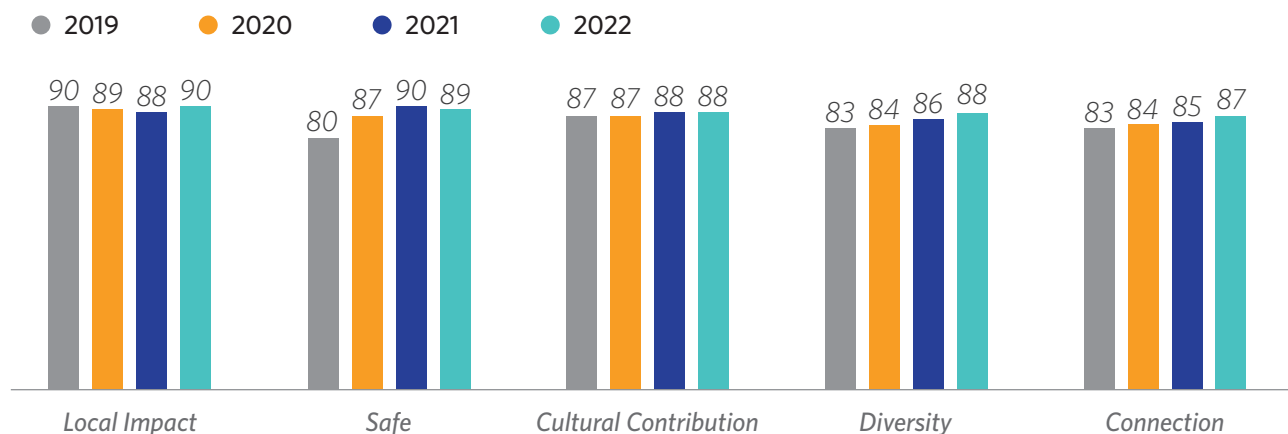
Average results for three of five of the dimensions increased in 2022 when compared to 2021, including the scores for 'Local Impact', 'Diversity' and 'Connection'. 'Cultural Contribution' remained stable.

Given that the 2022 event was significantly larger than the 2020 and 2021 events, stability in the outcomes is seen as a positive sign. Typically as events get larger, their social and cultural impacts can suffer as organisations adapt to the challenges associated with larger audiences.

In this case, Pride WA has managed to maintain positive results across comparable dimensions, suggesting notable capacity in being able to maintain a high-quality event in line with audience growth.

There was a small decrease in the average result for 'Safe', by only one point. Notably however, 'Safe' was 10 points higher than it was in 2019, indicating that Pride WA have done an excellent job in retaining the sense of safety for attendees on its return to Northbridge.

Note that the 'Content' dimension was added in 2022 as a strategic goal of Pride WA. It was not measured in previous years and therefore is not presented here.



"Thanks for an amazing event. Stalls really upped their game this year more interaction and give always. Liked the set up around the lake"

- Fairday attendee

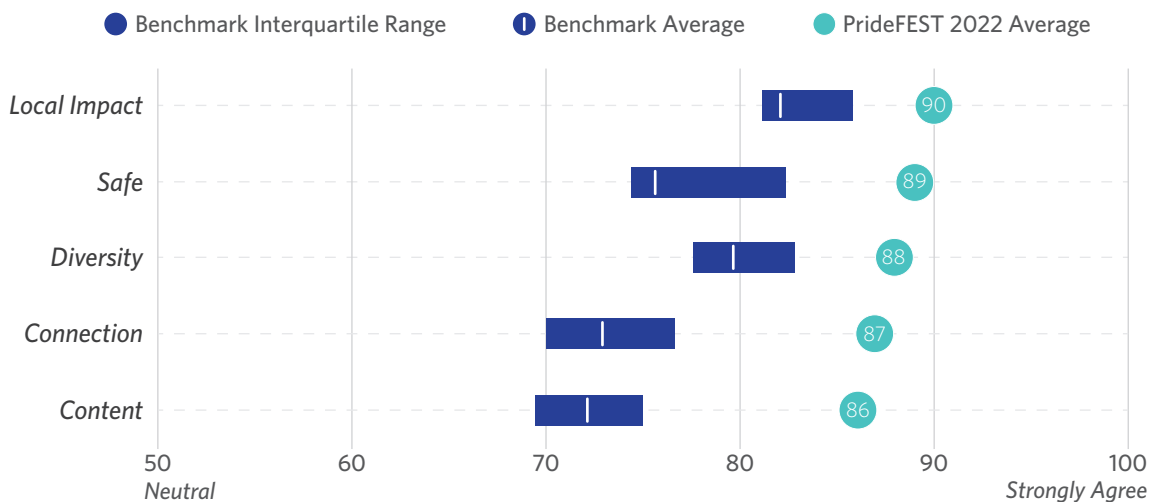


City of Perth Benchmarks

Benchmarks give context to organisers so that they can understand the unique impact they deliver through their events and the outcomes that distinguish them from other offerings. City of Perth benchmarks are available for five of the dimensions measured in PrideFEST 2022 surveys.

Below are the average dimension results achieved for PrideFEST 2022, compared to the benchmark interquartile range produced by City of Perth events. Results that sit within the range are be considered a 'benchmark' result, with anything above the range considered to be exceptional.

All five comparable dimension averages sit above the City of Perth benchmark range, an excellent result. This demonstrates the positive impact PrideFEST has on the people of Perth and its ability to facilitate programs that create safety and connection within the community



5.0

Pride WA and the Local Community

Respondents were asked about their impressions of the role that PrideFEST plays in the LGBTQIA+ community, in addition to questions about opportunities for PrideFest to grow and serve the community better.

PrideFEST plays a significant role in promoting diversity, equality, and inclusion in my community.

89% of respondents think a larger PrideFEST could lead to improved safety for LGBTQIA+ people and 80% of respondents felt a larger PrideFEST would improve the vibrancy of the Perth CBD. Only 4% of respondents selected 'none of the above', indicating an enthusiasm for a larger PrideFEST format in the future.

The results suggest that while the community perceive and appreciate economic benefits associated with a larger PrideFEST, the primary interest from respondents in a larger PrideFEST are the downstream social impacts that greater vibrancy and visibility of the LGBTQIA+ community will bring to their own personal sense of safety.

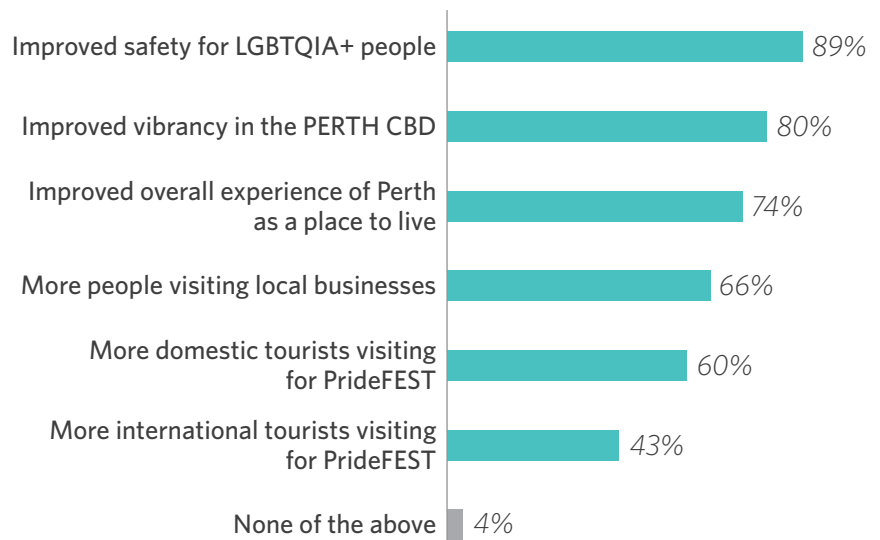
ROLE IN THE COMMUNITY

PrideFEST plays a significant role in promoting diversity, equality and inclusion in my community



LARGER PRIDEFEST

Do you think a larger PrideFEST could lead to any of the following?



In 2022, Pride WA began a grant program for LGBTQIA+ organisations. As a new program, respondents were asked about their awareness of it. 28% of respondents indicated they were aware of Pride WA's community grant program, which is a surprisingly large percentage for an organisational grant program. The high awareness suggests that there may be relatively high interest from the community in this grant program.

85% of respondents indicated they would recommend PrideFEST to friends and family living in regional WA. Over 50% of respondents indicated they would recommend PrideFEST to friends and family living interstate. This suggests that for many attendees, there is strong potential for them to leverage their connections to increase tourist-based attendance of PrideFEST.

When compared to responses regarding potential for a larger PrideFEST, these results appear to suggest that respondents believe a larger PrideFEST would attract domestic and international tourists, with a large percentage of current attendees indicating that would promote the event to their friends and family.

COMMUNITY GRANT



Of respondents were aware that Pride WA now runs a community grant program for LGBTQIA+ organisations and groups.

RECOMMENDATION AREAS

Would you recommend PrideFEST to friends of family living in any of the following areas?

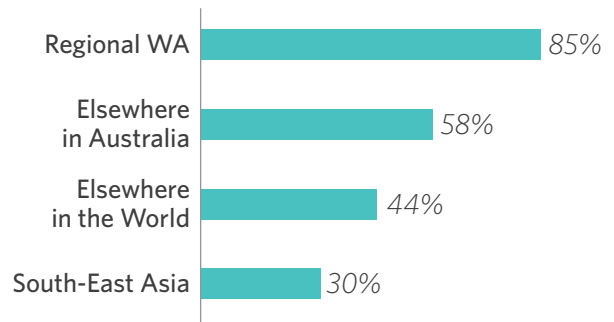


Photo Credit: Peter King



6.0

LGBTQIA+ Experiences

In addition to the evaluation research undertaken in 2022, complementary research was undertaken to understand the LGBTQIA+ community in greater detail and how PrideWA might better be able to advocate and support the community.

Respondents were asked about typical experience related to LGBTQIA+ peoples and which of these they had experienced. The list of experiences was developed and sourced from various research, including that conducted by the Australian Human Rights Commission, BeyondBlue and the Lord Mayors Charitable Foundation.

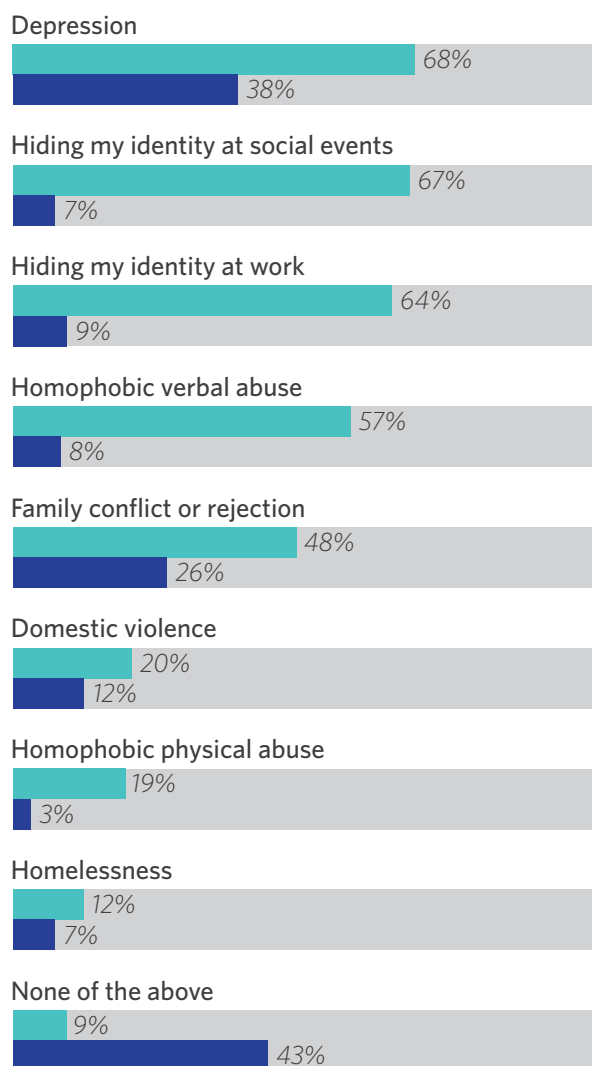
When asked about their past experiences, LGBTQIA+ respondents were always more likely to have experienced any of the listed hardships. Over half (68%) of LGBTQIA+ survey respondents indicated that they had experienced depression in the past, almost double that of non-LGBTQIA+ respondents. A large proportion of respondents also indicated that they had felt the need to hide their identity at work (64%) and/or at social events (67%), experienced homophobic verbal abuse (57%) or endured family conflict or rejection (48%).

Only 9% of LGBTQIA+ respondents indicated they had not experienced any of the hardships listed before, compared to 43% of non-LGBTQIA+ respondents. These are sobering findings and support the continued understanding that LGBTQIA+ people disproportionately experience negative and social hardships when compared to their non-LGBTQIA+ counterparts. They reinforce the importance of PrideFEST as an activity that brings necessary visibility to the wellbeing challenges faced by the LGBTQIA+ community.

EXPERIENCE OF LGBTQIA+ RESPONDENTS

Have you experienced any of the following before?

● LGBTQIA+ ● Non-LGBTQIA+



7.0

Partnerships and Funding

Partner Recall

Respondents to PrideFEST surveys were asked to identify which event sponsors they recalled. Response rates are presented below and reveal that City of Perth, Lotterywest, Coles, City of Vincent, BHP, and Mix 9.5 were the most recognised supports of Pride WA, all with over 50% recognition. Recognition for regular supporters were generally stable year-on-year, with the new addition of Mix 94.5 achieving over 50%, and both the City of Perth and City of Vincent achieving over 30% increases from their 2021 results.

PARTNER RECALL

Do you recall any of the following partners of PrideFEST 2022?

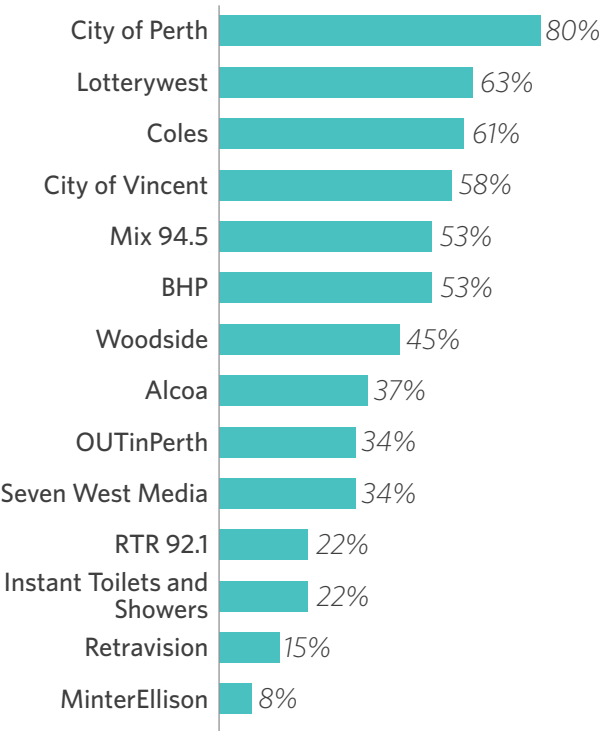


Photo Credit: Peter King

Government and Corporate Support

Survey respondents were asked to provide feedback about the support that the LGBTQIA+ community receives from WA businesses. This included, if they were satisfied with the current level of support and if not, how they felt WA businesses failed to support the community.

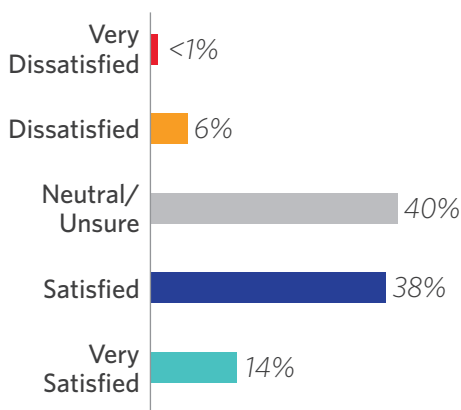
Additionally, respondents were asked if they thought that the WA government and/or corporate sectors should increase their financial support for the LGBTQIA+ community through Pride WA.

When asked how satisfied they were in relation to WA business support for the LGBTQIA+ community, 40% of respondents indicated they felt neutral or unsure.

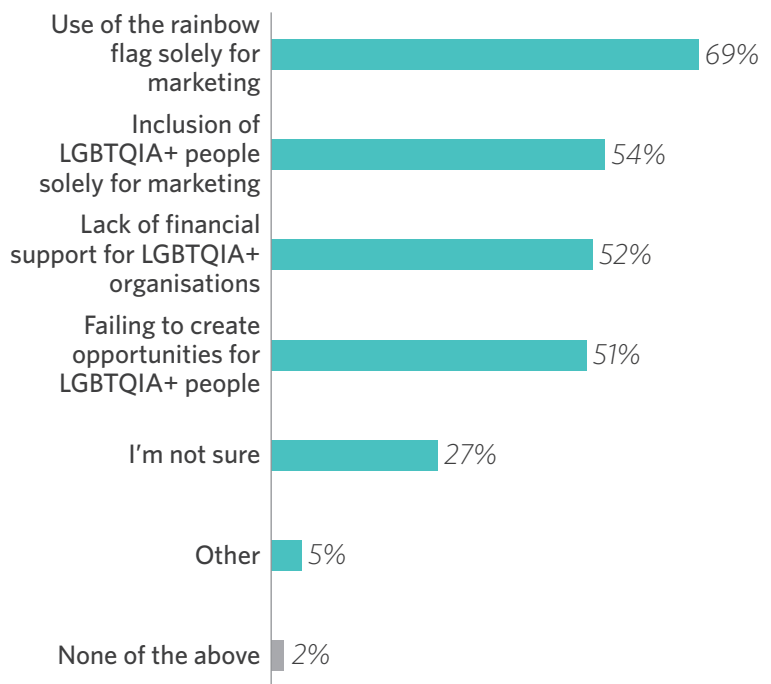
To provide additional context to this finding, respondents were asked how they felt WA businesses failed to support the LGBTQIA+ community. When provided with a multiple-choice list, the most common response was the feeling businesses used the rainbow flag solely for marketing (69%), followed by businesses that included LGBTQIA+ people for marketing purposes (54%). Both these response options saw increases compared to their 2021 results, suggesting a growing negative community attitude towards “pink washing” and a greater demand for accountability and authenticity from the corporate sector.

BUSINESS SUPPORT

How satisfied are you in WA business support for the LGBTQIA+ community?



Do you feel WA businesses fail to support the LGBTQIA+ community in any of the following way?





"The event was fantastic. The environment was welcoming for participants and viewers of all ages -including children. There was involvement of people with disabilities which I was appreciative of as well. Great night. Not too long, and then got to enjoy Perth as usual."

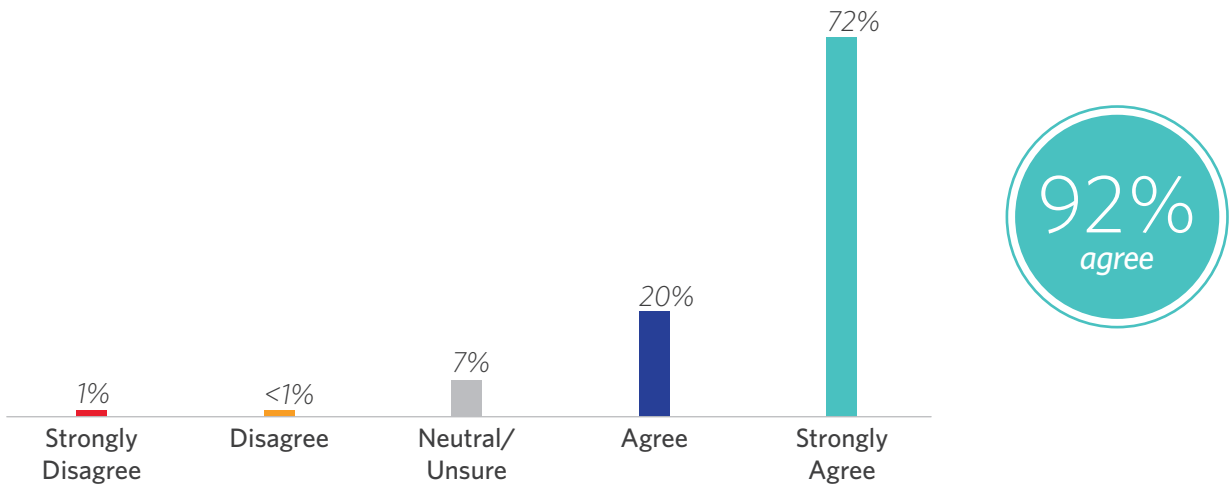
- Parade attendee

Photo Credit: Keith Mitchell

The survey asked whether people thought that the WA Government and/or the WA corporate sector should increase financial support for the LGBTQIA+ community through Pride WA. Most survey respondents (92% and 84% respectively) agreed that both entities should increase their financial support.

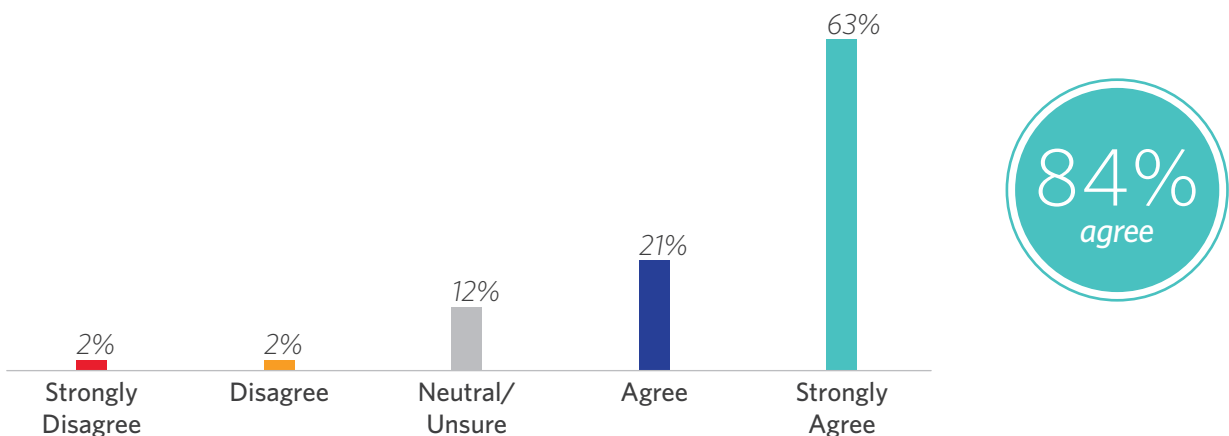
INCREASE FUNDING FROM GOVERNMENT

Do you think the WA Government should increase its financial support for the LGBTQIA+ community through Pride WA?



INCREASE FUNDING FROM CORPORATE SECTOR

Do you think the WA corporate sector should increase its financial support for the LGBTQIA+ community through Pride WA?



"Thank you so much for representing our community"

- Pride Piazza opening attendee



Photo Credit: Josie Nolan

8.0

Pride Parade Attendance

PrideFEST 2022 witnessed the return of the headline Pride Parade to the streets of Northbridge. Last held in the Northbridge in 2019, the 2022 event featured an attendance of approximately 30,500 people, as measured by Culture Counts. Compared to baseline visitation to the Northbridge area, the 2022 event represented a 25% increase in the typical Saturday night visitation to Northbridge.

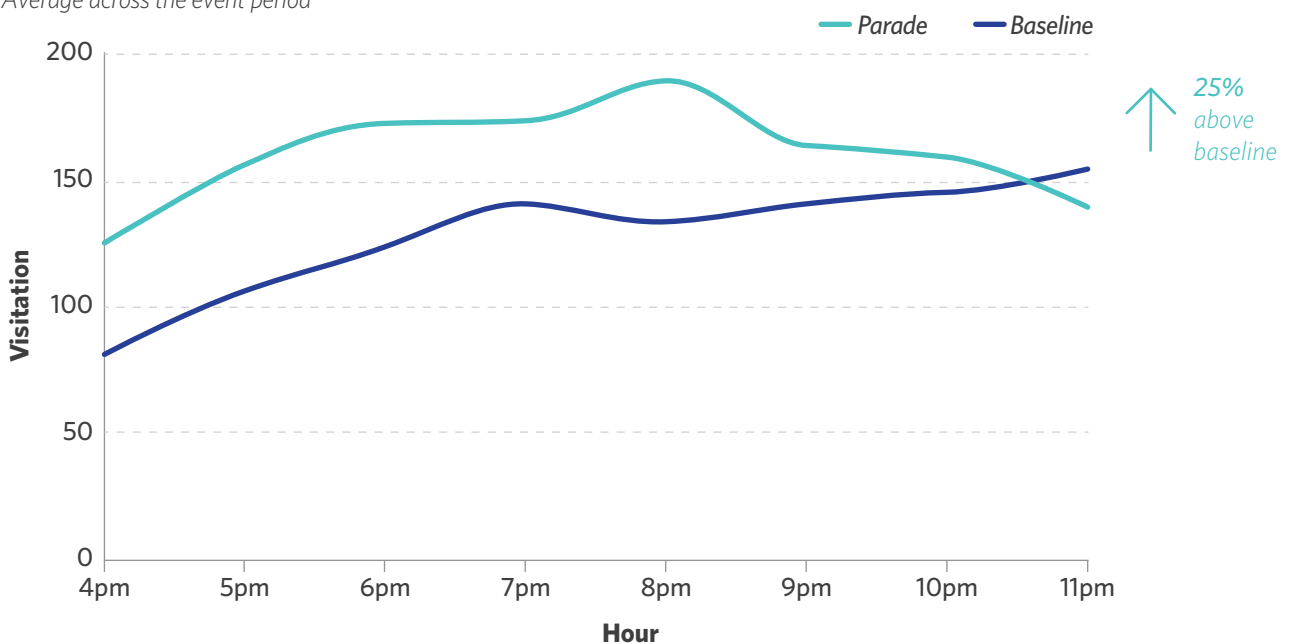
Compared to the 2019 parade, the 2022 event saw an increase of 21% in attendees.

Given the improved audience sentiment of safety in 2022 compared to the 2019 event, it may be that the increased visitation was related to how attendees felt safer in the Northbridge area than in previous years, coupled with the post-parade celebration events organised by Pride WA, such as the family-friendly afterparty event hosted in Russell Square.

Attendance figures for Pride Fairday and other events in the program have been provided by Pride WA.

VISITATION BY HOUR

Average across the event period



"Awesome work on accessibility, inclusiveness and acceptances, especially the great work on Auslan for speeches and stage performances!"

- Parade attendee



9.0

Economic Impact Assessment

PrideFEST 2022 saw an attendance of approximately 76,650 across Fairday, Pride Parade and other programmed events. Attendee surveys included several questions regarding spending at the event and in the local area, spend on accommodation, trip spend, and what they would have done if they hadn't attended the event.

This section of the report outlines the steps made to estimate the direct economic impact of the Festival and the flow-on impact of this expenditure.

Audience Expenditure

A key step in estimating overall economic impact is to assess the proportion of expenditure made by attendees that wouldn't have been spent in the area had the event not occurred. Survey respondents were asked what they would have done if they hadn't attended the PrideFEST event, this response is used to calculate Additionality.

Respondents were also asked to estimate how much they had spent at the event and in the local area due to their visit at a PrideFEST event. This data has been used to calculate the average spend for each type of visitor.

Attendance figures have been split into the three additionality categories, drawing on the ratios found in the survey data. The figures below show total expenditure for each group at the Pride Parade, Fairday, other Events and in total.

Audience Expenditure Summary

	PRIDE FAIRDAY	PRIDE PARADE	OTHER EVENTS	TOTAL
Average spending	\$41.89	\$62.02	\$41.37	\$49.84
Additionality adjustment	76%	88%	79%	82%
Attendance	37,000	30,509	9,150	76,659
Total Direct Audience Expenditure Impact	\$1,157,280	\$1,683,052	\$297,934	\$3,138,266

Accommodation & Trip Expenditure Summary

Respondents were also asked if they were staying overnight as a result of their visit to PrideFEST, 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 and the length of stay.

Attendees that identified as living intrastate, interstate or overseas, were asked additional questions about their spending and reasons for visiting. This data is used to determine the economic impact of the event on tourism related spending. To avoid double counting, accommodation and trip spend is only calculated for the Pride Parade.

Percentage of staying visitors	20%
Nights stayed in the area	9,178
Average Spend per night	\$26.99
Additionality adjustment	73%
Total Direct Accommodation & Trip Impact	\$578,739

Direct Impact Summary

Combining audience event and accommodation expenditure, and organisation expenditure contributed by Pride WA, the direct economic impact of PrideFEST was estimated to be over \$4.3 million.

↑ \$1.8M *Above 2019*

↑ \$2.6M *Above 2021*

DIRECT ECONOMIC IMPACT

Audience spending	\$3,717,005
<i>Event spending</i>	\$3,138,266
<i>Accommodation spending (Parade attendees only)</i>	\$398,517
<i>Trip spending (Parade attendees only)</i>	\$180,222
Organisation spending ¹	\$595,046
Total Direct Impact	\$4,312,051

¹ Organisation expenditure has been provided by Pride WA.

Multiplied Total Expenditure and FTE Jobs Created

The total expenditure as a direct result of PrideFEST 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 have been applied to total direct expenditure².

These tables are used to determine the number of full time equivalent jobs created by new money being spent in the economy, along with the flow on effects of that spending on downstream economic activity (i.e. multiplied impact).

The following table presents a summary of the direct economic impact of PrideFEST 2022, alongside the number of Full Time Equivalent jobs created by this direct spending and its multiplied impact throughout the economy.

	DIRECT IMPACT	DIRECT FTE	MULTIPLIED IMPACT
Audience Spending	\$3,717,005	28.7	\$10,785,906
<i>Event Impact</i>	<i>\$3,138,266</i>	<i>25.2</i>	<i>\$9,163,737</i>
<i>Accommodation Impact (Parade attendees only)</i>	<i>\$398,517</i>	<i>2.1</i>	<i>\$1,095,922</i>
<i>Trip Impact (Parade attendees only)</i>	<i>\$180,222</i>	<i>1.4</i>	<i>\$526,247</i>
Organisation spending	\$595,046	5.0	\$1,588,773
Multiplied Total Impact	\$4,312,051	33.7	\$12,374,679

² Event expenditure scaled by an output multiplier of 2.96, the national Food and Beverage multiplier (2.96). Accommodation expenditure scaled by an output multiplier of 2.75, the national Accommodation multiplier. Trip expenditure scaled by an output multiplier of 2.92, representing an average of national Retail and, Food and Beverage multipliers (2.88 and 2.96 respectively). Organisation expenditure scaled by an output multiplier of 2.67, representing the national Heritage, Creative and Performing Arts Output Multiplier.

Tourism Impact Modelling

It is important to note that while attendance of interstate and overseas visitors to PrideFEST 2022 was relatively small, their economic impact is comparatively much greater than local attendees. Interstate and overseas tourist attendees reported an average trip spend of approximately 10x the spend of attendees from the Perth Metro area.

Based on 2022 results, it is possible to model what the effect of an increase in interstate or overseas attendees could have on the economic impact result of PrideFEST.

Using available data and an economic impact methodology, Culture Counts has estimated the projected economic impact of a potential larger and more influential PrideFEST event. This projection assumes the following:

- Attendance of PrideFEST by WA locals remains stable.
- Spending from new tourists is in line with Tourism Research Australia estimates for 2022 interstate and overseas travellers where appropriate.
- Any growth of tourism attendees is equally divided between interstate and overseas visitors.
- Associated spending and additionality figures remain consistent across the PrideFEST program and that any projected growth in tourism does not affect or interact with the existing spending, visitation and additionality behaviour of existing tourist attendees.

This projection then calculates the effect of a growth in tourist attendances as a percentage of overall attendances, and what this effect would have on the economic impact assessment results for 2022.

Note that this projection is not presented as a strategy or tactical plan. Quantifying these effects is better served by a post-event evaluation. As tourist behaviour is associated with a range of dependent factors³, this projection seeks to present what is conservatively and theoretically possible, using appropriately sourced data and transparent modelling, so that decision-makers may be best placed to decide what is practicable.

The projection model requires four figures to calculate the effects of increased tourist attendance :

1. An average spend figure per night for each tourist attendee.
2. An average number of nights figure for each tourist attendee.
3. An estimated additionality figure for each tourist attendee (i.e. the percentage of spending that could be considered 'new' or attributable to PrideFEST).
4. Estimated attendance for each tourist type; intrastate, interstate and overseas.

³ Tourism WA, 2023. 'Return of Inbound Travel to WA - Latest Results'.

Average Spending

Average spending projections use figures provided by Tourism Research Australia (TRA) from its 2022 National and International Tourist Survey⁴⁵. Using the two most appropriate tourist visitor categories, we calculate average spend per night figures for interstate and overseas attendees. Note that TRA does not provide a WA-specific Holiday/Leisure or Visiting Friends/Relatives figure for overseas visitors, but it does provide a general figure for overseas WA tourists.

Given the nature of the event, the projection employs the average interstate tourist spend figure, along with the national holiday/leisure overseas tourist spend figure.

TOURIST TYPE	TOTAL VISITORS	TOTAL NIGHTS	AVG SPEND/ NIGHT PER PERSON
Interstate - WA	585K	5,705K	\$231.01
Holiday/Leisure	291K	3,019K	\$279.55
Visiting Friends/Relatives	293K	2,686K	\$176.47
Overseas - National			
Holiday/Leisure	1,014K	10,260K	\$129.63
Visiting Friends/Relatives	458K	38,840K	\$64.83
WA Travel	217K	7,608K	\$79.92

Source: Tourism Research Australia (2022). Analysis by Culture Counts.

4 Tourism Research Australia, 2022. 'National Visitor Survey Results September 2022'.

5 Tourism Research Australia, 2022. 'International Visitor Survey Results September 2022'.

Average Nights

The Average Nights projection uses figures provided by Tourism Research Australia (TRA). For comparison, results from PrideFEST 2022 are also provided to add context. Figures are presented in the following table, with a few areas to note. As mentioned as part of the economic impact assessment, the PrideFEST 2022 methodology calculates accommodation and trip spend for the Pride Parade only, so as to avoid double counting. This method therefore lowers the intrastate average nights figure from its Parade average of 1.44 nights to a Festival-wide average for 0.61. Similarly, because intrastate visitors also include those who do not stay overnight, the comparable figure from TRA

would be similar to that of the PrideFEST 2022 figure if the double-counting assumption is discounted (i.e. 1.44 for PrideFEST intrastate visitors compared to 1.28 from the TRA research). While figures for interstate travellers are similar between PrideFEST and TRA averages, figures from overseas attendees are lower when compared to TRA data. To this end, when considering the average number of nights stayed by different types of tourists in the 2022 PrideFEST results, the average number of nights stayed by an existing tourist attendee is set at 2.74, whereas additional tourists will utilise the TRA figures as part of the model's calculated projections so as to remain methodically consistent.

TOURIST TYPE	2022 ATTENDANCE	2022 AVERAGE NIGHTS	TRA 2022 *
Intrastate	5,583	0.61	1.28
Interstate	923	10.41	9.75
Overseas	2,282	4.83	34.97
Total / Average	8,788	2.74	-

* Source: Tourism Research Australia (2022). Analysis by Culture Counts. Intrastate average nights includes day trip attendees, which represented 57% of intrastate attendees to PrideFEST 2022 events.

Additionality

An appropriate figure for additionality is sourced from the 61 Economic Impact Assessments Culture Counts has conducted for arts and cultural events previously. Additionality seeks to estimate the percentage of spending that can be considered additional, or could genuinely be attributed to an event such as PrideFEST. It is statistically defined as one minus the percentage of deadweight (1 - dw%), where deadweight is the economic outcome that would have happened in the absence of an activity.

When compared to other events, PrideFEST exhibits a higher-than-average additionality for its intrastate attendees, but a slightly lower attribution for its interstate and overseas attendees. Using TRA visitor figures¹² as a method of weighting, we can calculate a conservative additionality estimate for this projection model. The intrastate additionality will remain static as per the model's assumptions. After weighting, the average additionality of tourist attendees is 44%.

VISITOR TYPE	INTRASTATE	INTERSTATE	OVERSEAS
Holiday/Leisure	65%	24%	13%
Visiting Friends/Relatives	56%	16%	21%
PrideFEST 2022	94%	15%	11%
Weighting (Holiday / VFR)	-	50% / 50%	31% / 69%
Weighted Additionality	94%	20%	19%

Source: Culture Counts (2021). Survey count (s) = 61; Respondent count (n) = 874. Survey count per origin/reason subcategory: 11 < s < 45. Respondent count per origin/reason subcategory: 31 < n < 257. Weighted determined by TRA visitor ratio.

Projection Figures

Based on the calculated figures, it is possible to estimate a linear effect model for projecting the impact of additional tourist attendance as part of PrideFEST. Using the average spend per night figures, coupled with the average number of nights and tourist additionality, the projected impact of each additional tourist attendee as part of PrideFEST can be estimated.

Assuming a weighting ratio of 1:1 between interstate and overseas attendees (as the model assumes no growth in intrastate attendees), we calculate the weighted impact of each additional tourist attendance.

FIGURES	INTRASTATE	INTERSTATE	OVERSEAS
Average Spend/Night	\$89.92	\$231.01	\$129.63
Average Nights	0.61	9.75	34.97
Average Additionality	94%	20%	19%
Impact Per Tourist	\$51.84	\$450.24	\$838.80
Weighting Ratio	0%	50%	50%
Weighted Impact Per Tourist			\$644.52

Source: Culture Counts (2022).

Economic Impact Projection

With the figures described, it is possible to project an economic impact scenario for a PrideFEST event where there is a growth in tourist attendees. The baseline scenario represents the current tourist impact of the 2022 event, along with the average spending, nights and additionality figures for those existing tourists. The growth scenarios then estimate a change of 1%, 3% and 5% of the tourism mix on the overall festival attendance.

As demonstrated, where new tourists are added to the event, the average figures for the baseline 2022 event begin to skew towards the average figures provided in the previous table. A 1% increase in the tourism mix is therefore shown to be equal to an additional \$566k worth of economic impact, or \$1.39m worth of tourism impact in total. The various growth scenarios serve to demonstrate the significant opportunity associated with any relatively small growth in tourism engagement with a future PrideFEST event.

GROWTH SCENARIO	BASELINE	1%	3%	5%
Estimated Attendance	76,600	77,479	79,324	81,170
New tourists	0	879	2,724	4,570
Total tourists (% of total attendance)	8,788 (11.5%)	9,667 (12.5%)	11,512 (14.5%)	13,358 (16.5%)
Average spend/night	\$77.21	\$86.58	\$101.61	\$112.48
Average nights	2.74	4.52	7.38	9.45
Average additionality	44%	41%	36%	33%
Tourist Direct Impact	\$826,089	\$1,392,485	\$2,581,918	\$3,771,351
Estimated Total Direct Impact	\$4,312,051	\$4,878,447	\$6,067,880	\$7,257,313
<i>Baseline Increase</i>	<i>\$0</i>	<i>\$566,397</i>	<i>\$1,755,829</i>	<i>\$2,945,262</i>



Photo Credit: Keith Mitchell