

ECONOMIC IMPACT

of NON-LOCAL

ARTS & CULTURE CONSUMERS



*Produced in
partnership with*
**CYPRESS RESEARCH
GROUP**
and
**THE GREATER
CLEVELAND GROWTH
ASSOCIATION**

A SURVEY OF VISITORS TO NINE CUYAHOGA COUNTY-BASED
ARTS AND CULTURE ORGANIZATIONS

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With support from
THE CLEVELAND FOUNDATION *and* **GEORGE GUND FOUNDATION**
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THE KULAS FOUNDATION *and* **JOHN P. MURPHY FOUNDATION**

BACKGROUND & OBJECTIVES



THE COMMUNITY PARTNERSHIP FOR ARTS AND CULTURE (THE PARTNERSHIP) WISHED TO ASSESS THE ECONOMIC IMPACT OF VISITORS TO ARTS AND CULTURAL ACTIVITIES AND DESTINATIONS. THE FOCUS OF THIS INVESTIGATION IS ON IMPORTED REVENUES — OR DOLLARS SPENT FOR ARTS AND CULTURAL ENTERTAINMENT IN CUYAHOGA COUNTY BY VISITORS FROM OUTSIDE CUYAHOGA COUNTY.

To determine the amount of dollars spent by visitors from outside Cuyahoga County as a result of arts and cultural offerings, we used an economic impact model — the REMI model (*see page 14*). The REMI model uses several pieces of data as inputs, and its major output is dollars generated by the revenue-generating entity in question.

There are several inputs to the model, and in order to acquire accurate inputs, we conducted a survey of visitors to nine different arts and cultural events or destinations during the spring and summer of 2003. From these surveys, we determined the following for each venue studied:

1. Proportion of visitors who are from outside Cuyahoga County
2. Their average spending on hotels, meals, travel, entertainment, and retail purchases while in Cuyahoga County.

These two pieces of information form the backbone of the economic impact model.

Determining average spending per person takes into account:

PARTY SIZE. We assumed that when respondents reported their hotel costs, they reported their estimated total hotel bill for their entire party (most likely their family members). Therefore, when calculating hotel costs on a per-person basis, we took party size into account.

REASON FOR BEING IN CUYAHOGA COUNTY. The objective of this survey was to provide input into an economic impact model which estimates the amount of dollars drawn into Cuyahoga County from those that live outside the county. To be accurate, we needed to weight the data according to each person's reason for being in the county. For example, when a

person reported they were visiting Cuyahoga County specifically to attend the arts or cultural event in question, their data (i.e., spending) received a full weight of 1.00.

If they were in the county for a business reason (meeting, convention, etc.), their data received a weight of 0.10. (We know that visiting the art or cultural event did not play into their coming to Cuyahoga County in the first place, but their visitation did have some economic impact, at least paying to see the event, or at most, extending their stay to see the event.)

Data from the third category of respondents, those who visited Cuyahoga County for personal reasons (visiting family, on vacation, etc.) received a weight of 0.25. Our reason for choosing a weight of 0.25 is not based on any empirical evidence, but on our assumption that the existence of the arts and cultural event played some role in at least some people choosing to visit family or friends in the county and/or choosing Cuyahoga County as a vacation destination.



DATA COLLECTION METHODS

Potential respondents for completion of the survey were chosen via an every nth selection process. Volunteers from each participating cultural organization selected each potential respondent, asked for his/her participation in the study, and gave him/her a survey. It is important to note that there was some variation in the data collection methods used because of the different types of organizations that participated. Respondents returned completed surveys at a collection box at the venue or mailed responses to Cypress Research Group.

Nine different arts and cultural venues were selected for data collection. There are approximately 125 nonprofit arts and cultural organizations within Cuyahoga County, and while a perfect study would include representation from visitors of all of them, it would be impractical to do so. Instead, we focused on the sites most likely to include a reasonable proportion of out-of-town visitors.

The sites included in the study, along with the number of completed surveys associated with each site

and the dates of data collection, are shown on the table below (see Table 1). Note that data collection was always conducted over several days and/or several performances. Table 1 also includes estimated annual attendance for each venue. This information forms the basis for the REMI economic impact model.

TABLE 1

	Number of Completed Interviews	Data Collection Dates	Annual Attendance Figures
Cain Park	100	6/20/03–8/9/03	136,647
The Cleveland International Piano Competition	62	7/30/03–8/10/03	9,000
The Cleveland Museum of Art	313	5/22/03–7/13/03	500,000
The Cleveland Orchestra	980	3/5/03–5/30/03	315,056*
The Cleveland Play House	699	3/13/03–3/21/03	101,292
The Cleveland Pops Orchestra	80	3/21/03–4/1/03	12,771
Lyric Opera Cleveland	108	6/18/03–7/2/03	7,800
Rock and Roll Hall of Fame and Museum	109	6/20/03–8/11/03	575,000
Western Reserve Historical Society	147	4/4/03–4/27/03	108,250

*For the purposes of this study, the above number does not include the Cleveland Orchestra's annual paid attendance at Blossom Music Center (118,086), which is located outside of Cuyahoga County. In addition, only subscription performance attendance (142,486) was included in the model since only patrons at subscription performances were surveyed.



Weighting

As shown in Table 1, the proportion of interviews completed at the various arts and cultural organizations is not proportional to annual attendance figures. The number of interviews completed was more of a function of availability of volunteers to administer the interviews than the availability of visitors to complete them. This has important implications for the overall results, but not for the economic impact modeling.

THE DATA ARE WEIGHTED SO THAT OVERALL RESULTS REFLECT THE CORRECT PROPORTION OF VISITORS TO EACH ORGANIZATION, NOT THE NUMBER OF COMPLETED QUESTIONNAIRES.

For example, although only 109 interviews were completed by visitors to the Rock and Roll Hall of Fame and Museum (about 5% of the total questionnaires), the Rock and Roll Hall of Fame and Museum has approximately 575,000 visitors per year, or about one-third of all visitors measured in this study. A failure to account for

this disproportion would cause misleading results. Therefore, the data are weighted to more accurately portray the purchasing activities of visitors to this and other organizations.

WHENEVER APPROPRIATE WE PRESENT BOTH THE WEIGHTED AND UNWEIGHTED RESULTS IN THIS REPORT, BUT WE MUST EMPHASIZE THAT WEIGHTED RESULTS ARE MOST INDICATIVE OF SPENDING PATTERNS of the entire group of out-of-county visitors to arts and culture-related organizations in Cuyahoga County.

Questionnaire objectives & structure

Our main objective for this survey was to provide spending data for an economic impact model. The results of that modeling process, completed by Dr. James Robey of The Greater Cleveland Growth Association, are discussed later in this report.

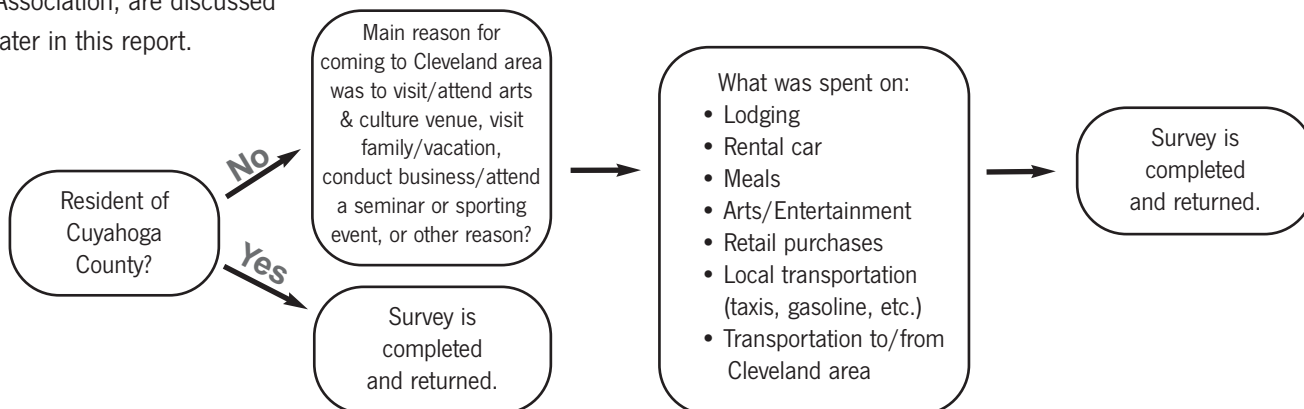
This survey captured three primary pieces of information:

1. Residential status of participants (that is, either county residents or out-of-town visitors, the latter being of most interest to us)
2. For out-of-town visitors, their primary reason for being in the area (so we can properly allocate the dollars they spend

to the arts and culture organizations and elsewhere)

3. Spending patterns of out-of-town visitors while in Cuyahoga County

See Appendix A for the complete survey questionnaire.





PARTY SIZE & TYPE

Mix of local and out-of-county visitors within parties

We asked respondents to report not only the number in their visiting party, but also the number of their party members who are from Greater Cleveland (zip codes 44001 to 44194). The analysis is limited to Cuyahoga County visitors.

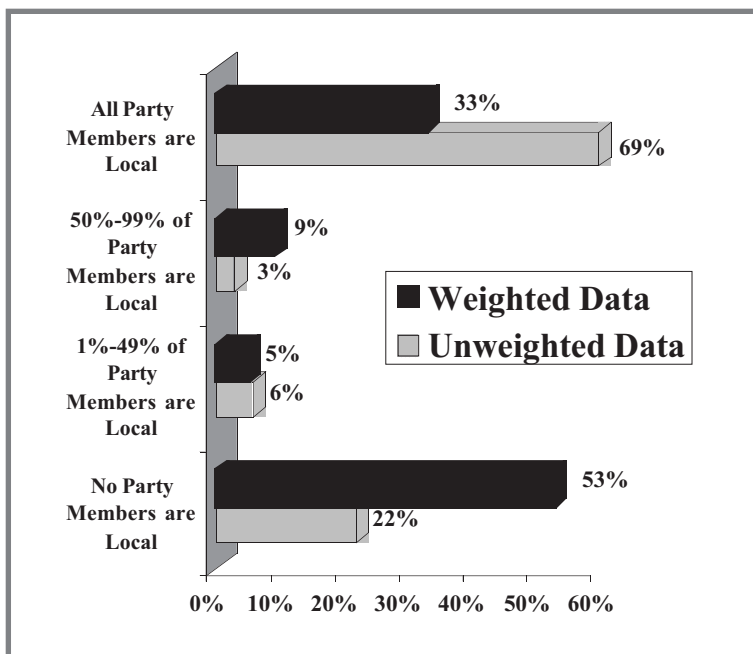
As shown in Chart 1, one-third (33%, weighted data) of the parties were comprised entirely of people

from Cuyahoga County. In contrast, about one half (53%) were comprised entirely of people not from Cuyahoga County. The remaining 14% of respondents were within parties that were mixtures: 9% were in parties that were mostly, but not entirely, local residents; 5% were in parties that were mostly, but not entirely, from out of town. There is a very wide variation, however, among venues.

For some of the nine arts and cultural venues studied we found that 80–85% of their parties were comprised entirely of Cuyahoga

County residents; these sites included The Cleveland Pops Orchestra, The Cleveland International Piano Competition and Lyric Opera Cleveland. For Cain Park, The Cleveland Orchestra**, The Cleveland Play House, and Western Reserve Historical Society, we saw a somewhat lower proportion of parties that were entirely local residents (65%–79%). The greatest departures from the average were The Cleveland Museum of Art, of which only 26% of their parties were comprised entirely of Cuyahoga County residents, and the Rock and Roll Hall of Fame and Museum, of which only 4% of visiting parties were comprised totally of local residents.

CHART 1



**Collection of data for The Cleveland Orchestra visitors was limited to subscription-series performances. Therefore, we assume that this is actually an underestimation of the proportion of visitors from outside the county for other Cleveland Orchestra performances and events. This is important because the proportion of visitors estimated to be from outside the county plays a large role in estimating the economic impact of each venue. We therefore assume that our estimate of the economic impact of The Cleveland Orchestra is on the low side.

PARTY SIZE & TYPE (CONT.)



Number in party

A minority of respondents attended these arts and cultural functions alone (6%, weighted data). The most common configuration was couples — 44% of the survey respondents were there with one other person. A good number, however, (34%) were there with a group of three or four people, and 8% were there with a group of five or six. Very few were there with a group of seven to eight people (2%) or very large groups of nine or more (6%).

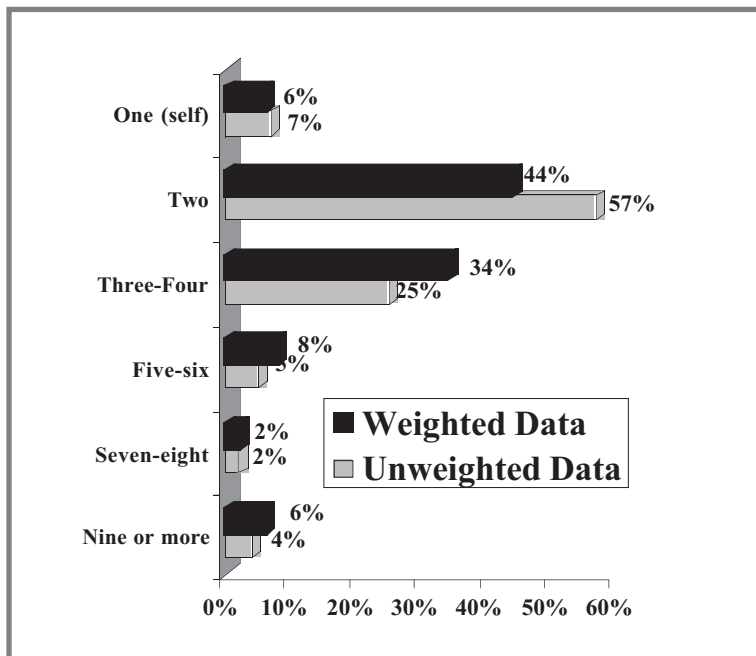
This pattern differs somewhat among organizations. For most of the organizations, about half of the respondents were there as a member of a couple (married or otherwise). This was especially true, however, for The Cleveland Orchestra audience members, of which 72% were there as a member of a pair. It was less true for respondents at the Rock and Roll Hall of Fame and Museum, of which only 34% were there as a pair and 44% were there in a group of three to four. Likewise, we saw that visitors to the Western Reserve Historical Society were more

commonly in groups of three or four (39%) than in pairs (26%).

On average, we see that party size is largest for the Rock and Roll Hall of Fame and Museum and the Western Reserve Historical Society (means of 3.2 and 3.4, respectively).

On average, party size for out-of-county visitors is larger (3.2) than for local visitors (2.7). Note that in this comparison we removed very large group sizes (over nine) so we could look only at real group sizes (not those that are formed for transportation reasons — school groups, tours, etc.).

CHART 2





PARTY SIZE & TYPE (CONT.)

Proportion of Cuyahoga County visitors

Here we look at the proportion of Cuyahoga County visitors a different way. On the previous page, we looked at the composition of parties visiting the arts or cultural venue, focusing on the percentage of parties comprised entirely of county residents or out-of-county residents.

On this page, we look at the entire respondent base and total the number within each party to determine the proportion of visitors that are Cuyahoga County residents and the proportion that are out-of-county residents.

In total, this study shows 28% live in Cuyahoga County (weighted data, not shown). This figure has little meaning as an estimator of the proportion of arts and cultural

consumers in Cuyahoga County who are county residents because this figure is heavily influenced by the organizations in our study, which, by design, included events/institutions that we expected to have a higher-than-average proportion of out-of-county visitors. As shown in Table 2, there is great variability among arts organizations, ranging from 82% for Lyric Opera Cleveland to 2% for the Rock and Roll Hall of Fame and Museum.

TABLE 2

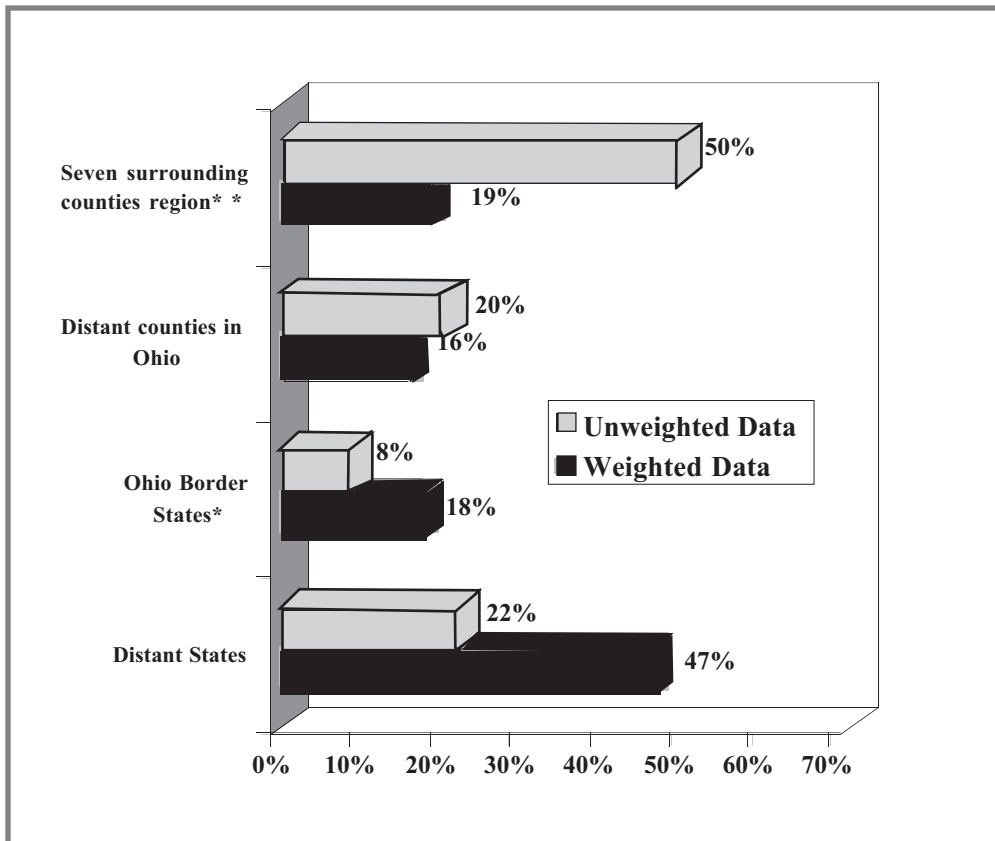
Arts and Cultural Institution or Venue	% of Visitors Who Are Not Residents of Cuyahoga County	% of Visitors Who Are Residents of Cuyahoga County
Lyric Opera Cleveland	18%	82%
The Cleveland International Piano Competition	24%	76%
The Cleveland Pops Orchestra	32%	68%
The Cleveland Play House	32%	68%
The Cleveland Orchestra	33%	67%
Cain Park	30%	70%
Western Reserve Historical Society	48%	52%
The Cleveland Museum of Art	80%	20%
Rock and Roll Hall of Fame and Museum	98%	2%



Resident zip code of visitors

A comprehensive list of the proportion of visitors from all zip codes in this study is included in Appendix B. Here we've categorized the zip codes based on Ohio counties and out-of-state regions. Visitors from outside of Ohio represented 40 different states and 11 different countries.

CHART 3



* Michigan, Indiana, Kentucky, Pennsylvania, West Virginia

** Lake, Summit, Geauga, Lorain, Wayne, Ashtabula & Portage Counties



VISIT TO CUYAHOGA COUNTY

Main reason for visiting Greater Cleveland — out-of-town visitors only (n=611)

For about one-third (34%) of the out-of-county visitors, their “main reason” for coming to Cuyahoga County was to visit the event where these data were collected.

The remaining two-thirds were mostly “visiting family or friends” (25%) or “on vacation” (23%). Very few were in this area for professional reasons (to “conduct

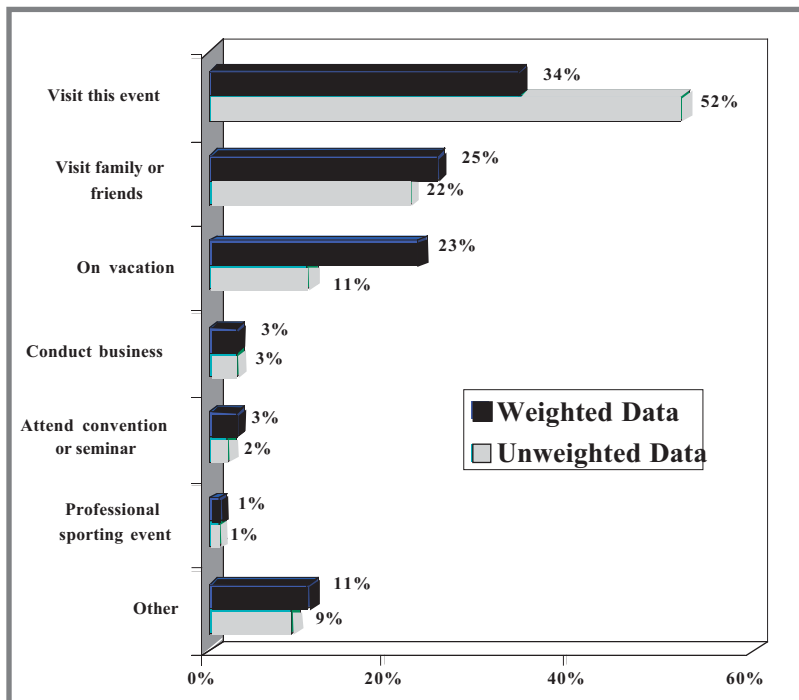
business” [3%] or to “attend a convention or seminar” [3%]). Only 1% were in the area mainly for a professional sporting event. The remaining 11% were in the area for some “other” reason, which included mostly personal events, such as weddings, school reunions or medical appointments.

The performance-based arts organizations had the highest proportion of visitors who were in this area specifically for the performance: The Cleveland Orchestra (74%), The Cleveland Play House (77%) and Cain Park

(58%). Much fewer of the visitors to destination-based cultural organizations were in our county specifically for that organization: Rock and Roll Hall of Fame and Museum (36%), Western Reserve Historical Society (39%) and The Cleveland Museum of Art (25%). Instead, these destinations more commonly appear to be a place to go while visiting here for other reasons (on vacation, visiting family, etc.).

These data are an important part of the modeling process because they directly affect the per-person spending which can be associated with each organization. This modeling process is described in detail later.

CHART 4



VISIT TO CUYAHOGA COUNTY (CONT.)



Activities done or planned while in Cuyahoga County

— out-of-town visitors only (n=611)

Out-of-town visitors typically participate in more than one arts-related activity while in the area (regardless of their main reason for being in the county). Over half (59%) visit some other arts or cultural destination (besides the one they were at for the survey), and another 26% attend a

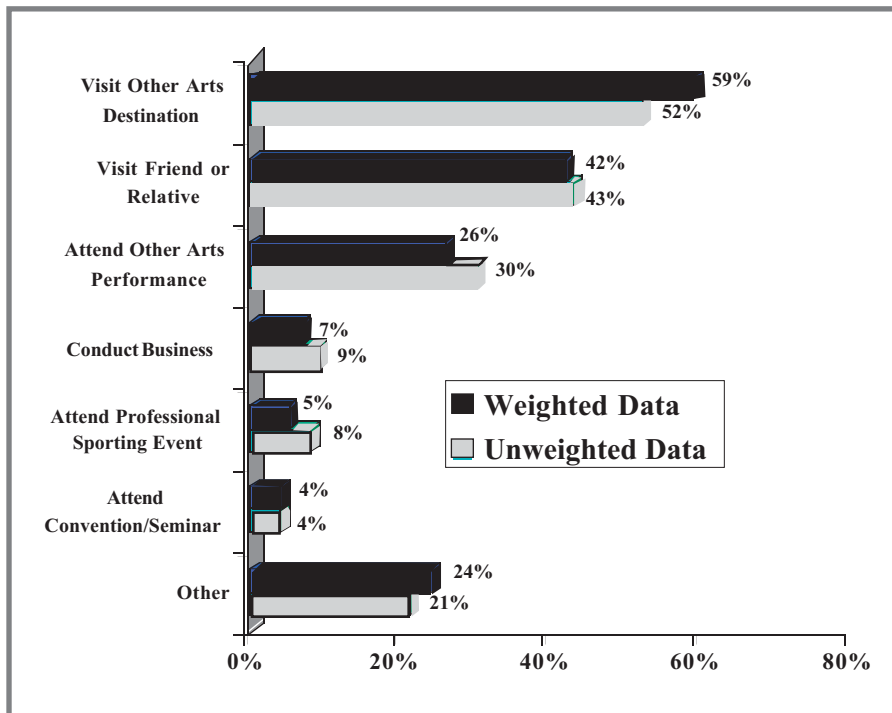
professional arts performance (music, dance, etc.). It is also very common for these arts and cultural patrons to visit friends or relatives while here in Cuyahoga County (42%). It is fairly uncommon for them to conduct business (7%), attend professional sporting events (5%) or attend a convention or seminar (4%).

NOTE: Do not misinterpret the above fact about professional sports attendance. In previous studies, we have seen

that residents of the Cleveland area who frequent local arts institutions also attend professional sporting events. Fans of the arts and sports are not distinct groups, but are often the same.

This study shows only that Cuyahoga County visitors tend not to attend both arts and professional sporting events.

CHART 5



Multiple responses accepted. Responses do not total to 100%.



VISIT TO CUYAHOGA COUNTY (CONT.)

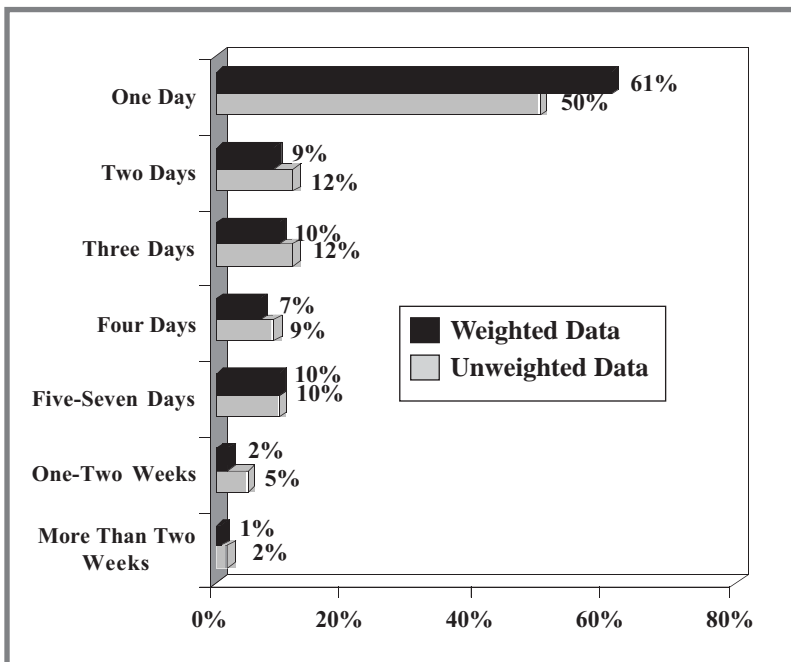
Length of Stay — out-of-town visitors only (n=611)

Respondents told us the number of days their trip to the Cleveland area entailed and if their trip included an overnight stay in a local hotel.

On average, county visitors remain in the area for 3.6 days. Almost two-thirds (61%, weighted data) of visitors were in the area for one day, and only 11% of this total included an overnight stay in a hotel (*not shown*).

Another 9% stayed in the area for two days, and 10% were here for three days. Seven percent had a four-day trip to the area, and about as many were here from five to seven days (10%). Few (2%) were in the area for one to two weeks or more (1%).

CHART 6



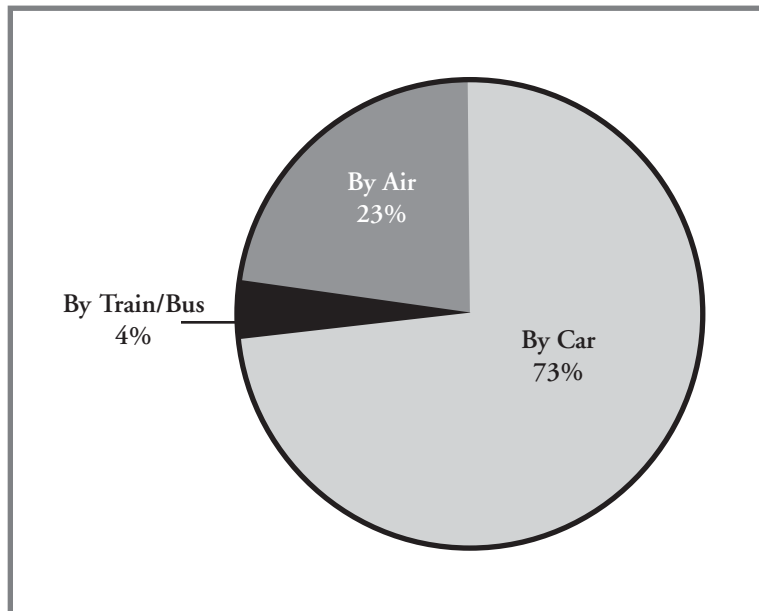


Mode of transportation to Cuyahoga County

— out-of-town visitors only (n=611)

Three in four Cuyahoga County visitors came to the area by car (73%). Most of the remaining visitors (23%) came by air. Only 4% traveled to the county by train or bus.

CHART 7*



*Weighted data



VISIT TO CUYAHOGA COUNTY (CONT.)

Hotel and car rental patronage — out-of-town visitors only (n=611)

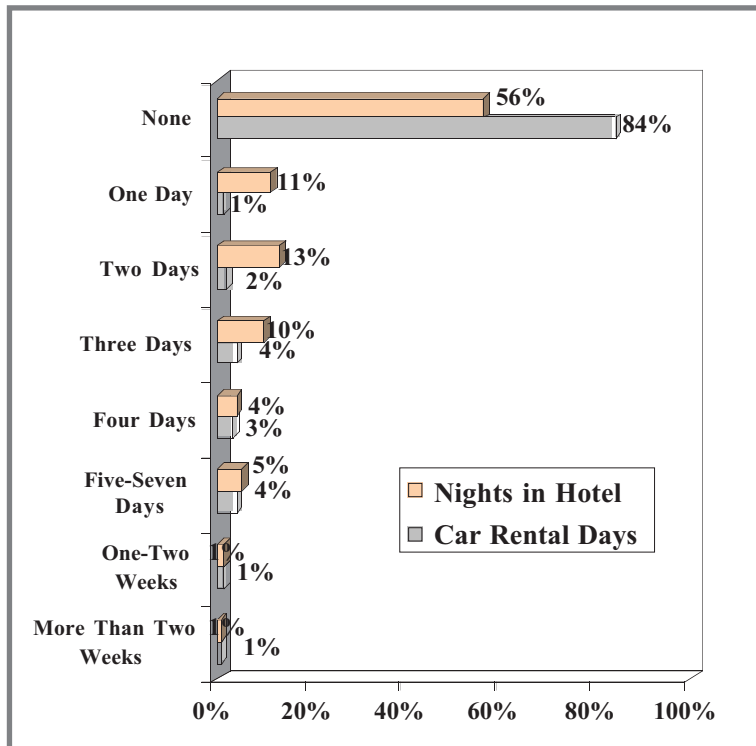
Respondents told us if their trip included a rental car and/or an overnight stay in a local hotel.

Of particular interest to us is the proportion of out-of-town visitors

who stayed in a hotel. In total, 56% of out-of-town visitors did not stay in a hotel. Eleven percent stayed in a hotel for one day, 13% for two days, and another 10% for three days. Few (4%) stayed in a hotel for four days and almost as few (5%) were in a hotel for five to seven days. A hotel stay of one to two weeks was rare (<1%), as was a stay longer than two weeks (<1%).

Renting a car is a rarer occurrence than staying in a hotel. While on average those that rent a car do so for several days (mean of 3.6 days), only 16% of out-of-county visitors rent a car at all during their stay.

CHART 8*



*Weighted data

VISIT TO CUYAHOGA COUNTY (CONT.)



Total per-person mean spending (in dollars) while in Cuyahoga County, by venue — out-of-town visitors only (n=611)

A major component of this study is the determination of the spending levels of out-of-county visitors to

the arts organizations studied. These data are the major inputs into the economic impact modeling process. Per-person spending for each organization (see Table 3) is a function of the number in party and the reason for being in Cuyahoga County (see page 1 for a detailed discussion).

Upon review of the mean spending figures, you will notice wide

variations. This is usually due to very small sample sizes for out-of-county visitors who also happen to have large travel costs (for example, The Cleveland International Piano Competition). Those instances of small sample sizes, however, have little impact on the overall economic model totals because they represent a small proportion of the total visitor base.

SPENDING PER PERSON

TABLE 3

	Hotel	Car Rental	Meals	Arts/ Entertainment	Retail	Local Trans.	Travel to Cleveland
Cain Park	\$0.20	\$0.00	\$19.76	\$19.01	\$15.55	\$3.94	\$8.33
The Cleveland Int'l. Piano Competition	\$111.11	\$22.22	\$56.88	\$5.40	\$2.56	\$3.15	\$107.22
The Cleveland Museum of Art	\$13.87	\$2.69	\$17.87	\$5.81	\$5.64	\$1.72	\$16.13
The Cleveland Orchestra	\$8.05	\$0.25	\$20.11	\$22.10	\$5.70	\$1.86	\$7.05
The Cleveland Play House	\$3.96	\$0.86	\$29.52	\$22.07	\$4.67	\$1.70	\$4.72
The Cleveland Pops Orchestra	\$0.00	\$0.00	\$12.37	\$28.09	\$0.00	\$0.00	\$138.89
Lyric Opera Cleveland	\$0.00	\$0.00	\$19.17	\$17.67	\$5.00	\$1.67	\$0.00
Rock and Roll Hall of Fame and Museum	\$14.55	\$2.96	\$10.58	\$7.94	\$6.35	\$0.82	\$12.52
Western Reserve Historical Society	\$4.38	\$0.40	\$9.11	\$5.17	\$4.83	\$1.19	\$5.46



THE REMI MODEL

Model overview

REGIONAL ECONOMIC MODELS, INC. (REMI), PROVIDES POLICY INSIGHT®, THE LEADING ECONOMIC FORECASTING AND POLICY-ANALYSIS MODEL. REMI'S MODELS ANSWER "WHAT IF?" QUESTIONS ABOUT THE EFFECT OF POLICY INITIATIVES ON THE ECONOMY OF LOCAL REGIONS. THE MODEL IS BASED ON BOTH RESEARCH AND DEVELOPMENT, WHICH IS SUBJECT TO PEER REVIEW AND PUBLISHED IN ACADEMIC JOURNALS.

The forecasting and policy analysis system includes key econometric estimates and integrates inter-industry transactions, long-run equilibrium features, and the new economic geography. It includes:

- Substitution among factors of production, in response to changes in relative factor costs
- Migration responses to changes in expected income
- Labor participation rate responses to changes in real wage and employment conditions
- Wage rate responses to labor market changes
- Consumer consumption responses to changes in real disposable income and commodity prices
- Local, regional and market share responses to changes in regional production costs and agglomeration economics.

A wide range of policy variables allows the user to represent the policy to be evaluated while the explicit structure of the model helps the user interpret predicted economic and demographic effects. The model is calibrated to many sub-national areas for policy analysis and forecasting. Each calibrated area (or region) has economic and demographic variables as well as policy variables so that any policy that affects a local economy can be tested.*

* From www.remi.com

Conducting economic impact assessments

In our study of the economic impact of non-local arts and culture consumers, we used a REMI model for Cuyahoga County.

The REMI model measured effects on 53 unique industries at county and regional levels, and allowed us to determine impact on income, gross regional product, employment and public sector revenue estimates.



Inputs & adjustments

Data entered into the REMI model came from patrons of arts and culture events in Cuyahoga County.

However, impacts were based only on data collected from patrons who live outside the region, due to these assumptions:

- Only “imported” dollars & “exported” services have an economic impact.
- Dollars spent by Cuyahoga County residents would be spent locally, whether or not at an arts and culture event. Therefore, their money is not new money to the region.

The only impact that was estimated was regarding visitor-patron spending. We assumed that no additional investment was needed to supply purchased goods and services, which implied that all needs locations, such as venues, hotels, stores and restaurants, were in place and ready. In reality, an increase (or decrease) in the number of visitors would, at some point, impact both ongoing and new investment in the “built” environment.

Inputs were based on per-person spending (across categories) at select arts and culture venues in Cleveland (*see Table 4*). Two categories of per-person spending were adjusted:

- **RETAIL**
Only the “margin” is used; rent, labor, transportation and other operating costs are estimated to be 60% of spending.
- **TRAVEL TO CLEVELAND**
We assume that travel costs were distributed between the guests’ origins and destination; we assigned only 50% of these costs to Cleveland.

Not all regional arts and culture venues were included in our study. We included only those that were:

- In Cuyahoga County
- Large enough to export services
- Willing to participate

Some venues not included in our study are Playhouse Square, Great Lakes Science Center and Cleveland Museum of Natural History.

TOTAL SPENDING INPUTS

TABLE 4

Hotel	Car Rental	Meals	Arts/ Entertainment	Local Trans.	Travel	Retail
\$14,971,977	\$2,857,611	\$17,110,897	\$10,430,919	\$1,585,919	\$7,813,780	\$4,399,237
Total Estimated Spending: \$59,170,340						



IMPACTS BASED ON SURVEY DATA

Total impact

The total economic impact is the sum of direct, indirect and induced impacts.*

- **DIRECT** — The first-round increase in jobs and spending.
- **INDIRECT** — The interindustry effects as local industries purchase from one another.
- **INDUCED** — Additional increases in output due to household spending and indirect effects of households responding.

* From Blair: Local Economic Development, 1995

ESTIMATES OF IMPACTS IN 2003

TABLE 5

Total Employment	2,226 employees
Private Non-Farm Employment	2,205 employees
Gross Regional Product	\$94,169,452
Personal Income	\$47,590,000
Disposable Personal Income	\$40,540,000

TOP IMPACTED INDUSTRIES

TABLE 6

Industry	Employees
Eating & Drinking Establishments	599
Hotels	330
Local & Interurban Transportation	241
Amusement & Recreation	237
Rest of Retail	207
Misc. Business Services	163
Construction	80
Misc. Professional Services	60
Wholesale	39
Nonprofit Organizations	30

TOP OCCUPATIONS

TABLE 7

Occupation	Employees
Food & Beverage Serving Workers	376
Motor Vehicle Operators	173
Cooks and Food Preparation Workers	144
Building Cleaning Workers	122
All Other Sales and Related Workers	119
Management Occupations	118
Other Food Preparation and Serving	98
Information & Record Clerks	85
Secretaries/Administrative Assistants	78

IMPACTS BASED ON SURVEY DATA (CONT.)



STATE & LOCAL REVENUE IMPACTS IN CUYAHOGA COUNTY

TABLE 8

State Revenues at State Average Rates*	\$6,751,075
State Expenditures at State Average Rates	\$506,077
Net Difference	\$6,244,998
Local Revenues at State Average Rates	\$3,248,561
Local Expenditures at State Average Rates	\$1,250,462
Net Difference	\$1,998,099

* "Average rates" are created using the average rate for all state and city activities in Ohio. These estimates are not based on the specific rates used in Cuyahoga County and its sub-county taxing districts. Actual tax collections for activities in a specific local setting may be slightly above or below the "average" revenues indicated here.

IMPACTS IN THE CONSOLIDATED METROPOLITAN STATISTICAL AREA (CMSA)*

TABLE 9

Total Employment	2,440 employees
Private Non-Farm Employment	2,412 employees
Gross Regional Product	\$106,873,671
Personal Income	\$67,750,000
Disposable Personal Income	\$57,690,000

* The Consolidated Metropolitan Statistical Area (CMSA) is the federally designated integrated economic-labor market. The Cleveland-Akron CMSA includes Ashtabula, Cuyahoga, Geauga, Lake, Lorain, Medina, Portage and Summit counties.

STATE & LOCAL REVENUE IMPACTS IN THE CMSA

TABLE 10

State Revenues at State Average Rates*	\$9,356,628
State Expenditures at State Average Rates	\$717,670
Net Difference	\$8,638,958
Local Revenues at State Average Rates	\$4,294,846
Local Expenditures at State Average Rates	\$1,589,743
Net Difference	\$2,705,103

* "Average rates" are created using the average rate for all state and city activities in Ohio. These estimates are not based on the specific rates used in Cuyahoga County and its sub-county taxing districts. Actual tax collections for activities in a specific local setting may be slightly above or below the "average" revenues indicated here.



SUMMARY & CONCLUSIONS

- Nine arts and culture venues and their patrons were surveyed between March and August 2003. Only patrons who resided outside of Cuyahoga County were used in the analysis.
 - Based on survey results, we developed per-person average spending for: lodging, rental cars, meals, costs of entertainment, retail purchases and local/non-local transportation.
- Spending and length of stay results were weighted based on reasons for attending the venue.
- This data was entered into the REMI model to assess economic impact on Cuyahoga County.
 - The model estimated impacts on employment, income and gross regional product (GRP). Retail data was reduced by 40% due to costs of goods. Costs of
- travel to Cuyahoga County were reduced by 50%, with half the costs attributed to visitors' original locations.
- **TOTAL SPENDING INPUTS BY PATRONS FROM OUTSIDE OF CUYAHOGA COUNTY WAS SLIGHTLY MORE THAN \$59 MILLION.**

SUMMARY OF IMPACT FINDINGS
ON CUYAHOGA COUNTY

TABLE 16

2,226 employees
\$94 million in gross regional product
\$47.5 million in income
\$8.2 million in state and local revenues

APPENDIX A — SURVEY QUESTIONNAIRE



Thank you for completing this survey. It will help us provide the best experience for you and all future visitors.

1. Including yourself, how many people are in your party today? _____
2. What is your home zip code? _____
3. How many in your party, including yourself, live in the Greater Cleveland area (zip codes 44001-44194)? _____

READ BELOW BEFORE PROCEEDING!

1. If you are from **outside of the Greater Cleveland area**, please skip to Question 4 now.
2. If **everyone in your party at this performance is from the Greater Cleveland area**, including yourself, **you are done!**
Please return the questionnaire to the volunteers as you exit.
3. If **you are from the Greater Cleveland area but someone in your party at this performance is from outside of the Greater Cleveland area**, please have him/her complete the remainder of the questionnaire.

Please be sure you followed the instructions above BEFORE continuing!

4. What was the **main** reason that you came to the Cleveland area? (check only one)

- For this event/activity
- On vacation
- Conduct business
- Attend a convention or business seminar
- Attend a professional sporting event
- Visit family or friends
- Other (please specify):

5. While in the Cleveland area, which have you done or do you plan to do? (check all that apply)

- Visit other arts or cultural destinations in the area (museum, gallery, science center, Rock and Roll Hall of Fame, historical site)
- Attend a professional performance (music, dance, dramatic play, literary event)
- Visit a friend or relative
- Conduct business
- Attend a convention or business seminar
- Attend a professional sporting event
- Other (please specify):

- 6a. How many days and nights, in total, was this trip to the Cleveland area?

Days: _____ Nights: _____

- 6b. Of those nights, how many of them were spent in a hotel or motel? _____

7. For how many of those days did you rent a car for use within the Cleveland area? _____

8. How did you travel to and from the Cleveland area?

- By car (own or rental)
- By train/bus
- By air

Did you rent a car?

- Yes
- No

9. Please **estimate your total spending while in the Cleveland area on:** (if zero, leave blank)

Hotel/motel room charges	\$ _____
Rental car	\$ _____
Meals	\$ _____
Art /entertainment activities (current site, museums, shows, etc.)	\$ _____
Retail purchases	\$ _____
Local transportation (gasoline, taxi, etc.)	\$ _____
Transportation to and from the Cleveland area (airplane, train, bus)	\$ _____



APPENDIX A — SURVEY QUESTIONNAIRE

For internal use only:

Location: _____

Date: _____

Time: _____

Administered By: _____

Survey of Arts and Culture Participants in the Greater Cleveland Area

2003

Thank you for completing this survey!

Please deposit it in the designated collection box or to a volunteer as you exit. If you prefer, questionnaires can be returned to:

Cypress Research Group
P.O. Box 202120
Shaker Heights, OH 44120

This survey is being conducted on behalf of all of the arts and cultural institutions in the Greater Cleveland area. The results will help us understand the role of arts and culture in our community.

Thank you for your help!



APPENDIX B — ZIP CODES OF VISITORS TO ALL EVENTS/INSTITUTIONS (SORTED BY ZIP CODE)



Zip	State	Zip	State	Zip	State
01028	MA	10017	NY	18425	PA
01029	MA	10018	NY	18426	PA
01030	MA	10019	NY	18428	PA
01031	MA	10020	NY	19009	PA
02025	MA	10021	NY	19010	PA
02026	MA	10022	NY	19701	DE
02030	MA	10023	NY	20001	DC
02032	MA	10024	NY	20115	VA
02035	MA	10025	NY	20117	VA
02038	MA	10026	NY	20118	VA
02043	MA	10027	NY	20119	VA
02871	RI	10028	NY	20706	MD
03034	NH	10029	NY	20707	MD
04011	ME	10030	NY	20708	MD
04015	ME	10031	NY	20710	MD
04917	ME	10032	NY	20711	MD
05404	VT	10033	NY	20712	MD
06107	CT	15001	PA	22015	VA
07008	NJ	15003	PA	22026	VA
07009	NJ	15004	PA	22027	VA
07010	NJ	15005	PA	22030	VA
07011	NJ	15006	PA	22031	VA
07012	NJ	15007	PA	22032	VA
07013	NJ	15009	PA	22033	VA
07014	NJ	15010	PA	24901	WV
07016	NJ	15012	PA	24910	WV
07017	NJ	15014	PA	24915	WV
08035	NJ	15015	PA	24916	WV
08036	NJ	15017	PA	27407	NC
08037	NJ	15018	PA	27408	NC
08038	NJ	15019	PA	27409	NC
10001	NY	15020	PA	27410	NC
10002	NY	15021	PA	29611	SC
10003	NY	15022	PA	30002	GA
10004	NJ	15024	PA	30004	GA
10004	NY	15025	PA	30005	GA
10005	NY	15026	PA	30008	GA
10006	NY	15027	PA	30011	GA
10007	NY	15028	PA	30012	GA
10009	NY	15030	PA	32312	FL
10010	NY	15031	PA	32320	FL
10011	NY	15033	PA	32321	FL
10012	NY	17002	PA	32322	FL
10013	NY	17003	PA	32323	FL
10014	NY	17004	PA	32324	FL
10016	NY	17005	PA	32327	FL



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Zip	State	Zip	State	Zip	State
32328	FL	43920	OH	44105	OH
32330	FL	44001	OH	44106	OH
33019	FL	44004	OH	44107	OH
33020	FL	44007	OH	44108	OH
33021	FL	44011	OH	44109	OH
33023	FL	44012	OH	44110	OH
33024	FL	44017	OH	44111	OH
33025	FL	44019	OH	44112	OH
33026	FL	44020	OH	44113	OH
33027	FL	44021	OH	44114	OH
33028	FL	44022	OH	44115	OH
33029	FL	44023	OH	44116	OH
33030	FL	44024	OH	44117	OH
35004	AL	44026	OH	44118	OH
36003	AL	44028	OH	44119	OH
37010	TN	44030	OH	44120	OH
37215	TN	44035	OH	44121	OH
40003	KY	44039	OH	44122	OH
40004	KY	44040	OH	44123	OH
40006	KY	44041	OH	44124	OH
40007	KY	44044	OH	44125	OH
43032	OH	44047	OH	44126	OH
43050	OH	44048	OH	44127	OH
43055	OH	44052	OH	44128	OH
43056	OH	44053	OH	44129	OH
43081	OH	44054	OH	44130	OH
43082	OH	44055	OH	44131	OH
43085	OH	44056	OH	44132	OH
43110	OH	44057	OH	44133	OH
43112	OH	44060	OH	44134	OH
43113	OH	44062	OH	44135	OH
43130	OH	44065	OH	44136	OH
43143	OH	44067	OH	44137	OH
43202	OH	44070	OH	44138	OH
43209	OH	44072	OH	44139	OH
43213	OH	44074	OH	44140	OH
43214	OH	44077	OH	44141	OH
43220	OH	44081	OH	44142	OH
43229	OH	44086	OH	44143	OH
43338	OH	44087	OH	44144	OH
43440	OH	44089	OH	44145	OH
43506	OH	44090	OH	44146	OH
43522	OH	44092	OH	44147	OH
43526	OH	44094	OH	44149	OH
43537	OH	44095	OH	44150	OH
43551	OH	44101	OH	44152	OH
43560	OH	44102	OH	44181	OH
43619	OH	44103	OH	44202	OH
43701	OH	44104	OH	44203	OH

APPENDIX B — ZIP CODES OF VISITORS TO ALL EVENTS/INSTITUTIONS (SORTED BY ZIP CODE)



Zip	State	Zip	State	Zip	State
44210	OH	44420	OH	44608	OH
44212	OH	44423	OH	44609	OH
44214	OH	44425	OH	44610	OH
44221	OH	44427	OH	44611	OH
44223	OH	44428	OH	44612	OH
44224	OH	44429	OH	44613	OH
44226	OH	44430	OH	44614	OH
44230	OH	44431	OH	46001	IN
44233	OH	44432	OH	46011	IN
44234	OH	44436	OH	46012	IN
44236	OH	44437	OH	46013	IN
44240	OH	44438	OH	46016	IN
44241	OH	44440	OH	46017	IN
44243	OH	44441	OH	46030	IN
44253	OH	44442	OH	46031	IN
44254	OH	44443	OH	48001	MI
44255	OH	44444	OH	48002	MI
44256	OH	44445	OH	48003	MI
44262	OH	44446	OH	48005	MI
44266	OH	44449	OH	48006	MI
44273	OH	44450	OH	48009	MI
44274	OH	44451	OH	48014	MI
44275	OH	44452	OH	48015	MI
44278	OH	44454	OH	48017	MI
44280	OH	44455	OH	48021	MI
44281	OH	44460	OH	48022	MI
44286	OH	44470	OH	48023	MI
44287	OH	44471	OH	48025	MI
44301	OH	44473	OH	48026	MI
44303	OH	44481	OH	48027	MI
44304	OH	44483	OH	48028	MI
44305	OH	44484	OH	48030	MI
44312	OH	44485	OH	48032	MI
44313	OH	44490	OH	48034	MI
44314	OH	44491	OH	48035	MI
44319	OH	44502	OH	48036	MI
44320	OH	44503	OH	49080	MI
44321	OH	44504	OH	50001	IA
44333	OH	44505	OH	53518	WI
44374	OH	44506	OH	53520	WI
44400	OH	44507	OH	53521	WI
44406	OH	44509	OH	54021	WI
44408	OH	44510	OH	55003	MN
44410	OH	44511	OH	55005	MN
44411	OH	44512	OH	55006	MN
44412	OH	44514	OH	55007	MN
44413	OH	44515	OH	60002	IL
44417	OH	44601	OH	60004	IL
44418	OH	44606	OH	60005	IL



APPENDIX B — ZIP CODES OF VISITORS TO ALL EVENTS/INSTITUTIONS (SORTED BY ZIP CODE)

Zip	State	Zip	State
60007	IL	90010	CA
60008	IL	90011	CA
60010	IL	90012	CA
60012	IL	90013	CA
60013	IL	90014	CA
60014	IL	90015	CA
60015	IL	90016	CA
60016	IL	90017	CA
63005	MO	90018	CA
63010	MO	90019	CA
63011	MO	97001	OR
63012	MO	97002	OR
63013	MO	97004	OR
65473	MO	97005	OR
66002	KS	98029	WA
66006	KS	98031	WA
66007	KS	98032	WA
66008	KS		
68002	NE		
68003	NE		
74401	OK		
74403	OK		
75088	TX		
78410	TX		
78411	TX		
79752	TX		
80002	CO		
80003	CO		
80004	CO		
80005	CO		
80007	CO		
83011	WY		
84650	UT		
84651	UT		
84652	UT		
84653	UT		
85207	AZ		
85258	AZ		
85281	AZ		
85302	AZ		
90001	CA		
90002	CA		
90003	CA		
90004	CA		
90005	CA		
90006	CA		
90007	CA		
90008	CA		