

Arts and Cultural Festival Competitive Analysis

Conducted By



December 2004

Ann Arbor, MI
Baltimore, MD
Buffalo, NY
Charleston, SC
Chicago, IL
Cincinnati, OH
Columbus, OH
Detroit, MI
Fort Wayne, IN
Indianapolis, IN
New Orleans, LA
Philadelphia, PA
Pittsburgh, PA
Rochester, NY
Stratford, Ontario
Toledo, OH
Toronto, Ontario
Cleveland, OH

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Introduction

From September 2004 through December 2004, The Community Partnership for Arts and Culture (CPAC) conducted a comparative analysis of arts and cultural festivals operating within a 250 mile radius of Cleveland. The purpose of the research was to better understand the competitive environment Cleveland and Northeast Ohio arts and cultural festivals would encounter, and provide festival planners with a base of information that would help them determine how to develop, position or improve a festival within that environment.

To complete its task, The Community Partnership for Arts and Culture identified festivals within the search radius that demonstrated a moderate to significant regional scope, economic impact on their surrounding communities, regional, national and international recognition or success as a unique and highly functioning festival. CPAC identified and assessed 22 festivals representing 18 different cities within and outside of the search radius. A few select festivals from outside the search radius were also included because of their artistic and cultural content in relationship to similar content in the Cleveland region.

This report is the end product of the arts and cultural festival analysis. The reader will find information on select festivals happening in the following cities: Ann Arbor, MI; Baltimore, MD; Buffalo NY; Charleston, SC; Chicago, IL; Cincinnati, OH; Columbus, OH; Detroit, MI; Fort Wayne, IN; Indianapolis, IN; New Orleans, LA; Philadelphia, PA; Pittsburgh, PA; Rochester, NY; Stratford, Ontario, Canada; Toledo, OH; and Toronto, Ontario, Canada.

For each festival CPAC gathered data on the following eleven dimensions: budget, date, theme, attendance, price, target audience, marketing strategies, volunteer support, distance traveled to attend events, and metrics used to assess festival impact and economic analysis. Information was collected through Internet research, and interviews with festival management. Not all sites had data that corresponded to each dimension of the protocol. Also included in this report are a number of matrices highlighting select data. These matrices offer a quick way for the reader to get an overall picture of the festival environment within and outside of the search radius.

The final appendices contain specific analysis of the festivals, used in this report, but conducted by outside sources. These appendices detail information regarding particular

demographic figures, economic impact studies, festival budgets, and details of festival initiatives.

This research will enable the reader to formulate an opinion surrounding useful practices in festival management and the best way to position a festival within the competitive regional environment.

Ann Arbor, MI

EVENT: Ann Arbor Art Fair

BUDGET: \$183,000

DESCRIPTION: Ann Arbor's annual art festival consists of four separate fairs. Together they occupy the majority of downtown, drawing more than 1,000 artists and close to half a million visitors to downtown and the campus area over four days (Wednesday through Saturday). Free concerts and a huge variety of food and drink vendors are on hand.

VENUE: **Ann Arbor Street Art Fair** is located on the streets surrounding Burton Tower. The South University Area Association's **Art Fair Village** occupies South U. and parts of East U. and Church. The **State Street Area Art Fair** is located in the north-of-campus shopping district, while the **Ann Arbor Summer Art Fair** is on State and Liberty.

PRICE: FREE.

DATE: July 20-23, 2005.

CATEGORY: Fine Art/Craft.

THEME: None.

ESTIMATED ATTENDANCE: 500,000

CONTACT: Nick Miller (CVB) nmiller@annarbor.org 734-995-9487
Ann Arbor Area Convention and Visitors Bureau at 734-995-7281 or 800-888-9487.

Shary Brown sbrown@artfair.org
Ann Arbor Street Art Fair (www.artfair.org 734-994-5260)

Art Fair Village (www.a2southu.com/artfair.php 734-663-5300)
State Street Area Art Fair (www.a2state.com 734-663-6511)
Ann Arbor Summer Art Fair (www.michiganguild.org 734-662-3382)

TARGET AUDIENCE/ GROUP OR REGION MARKETED TOWARD:

- Well educated.
- All ages.

DISTANCE TRAVELED TO ATTEND EVENT:

- 85% of attendee's are from within 400 miles of Ann Arbor.
- 15% are from the US and Canada.

SPECIFIC MARKETING STRATEGIES USED TO PROMOTE EVENT:

- Posters.
- Postcards are mailed to individual artists mailing lists.
- Media partners for the Ann Arbor Art Festival include:
 - Newspaper and Radio.
 - Detroit News includes inserts for the event.
 - 100+ feature articles on the event throughout Southeastern MI.
- PR agent is hired to target press release and do follow up.
- All news and television covers the event including PBS.

VOLUNTEER SUPPORT REQUIRED:

- 600-1200 volunteers are needed.
- Online application available.
- Volunteer duties include:
 - Information Booth Staff - Assisting and directing fairgoers or other volunteers, getting information to the on-site staff, acting as the general resource center for the fair, and aiding in the distribution of promotional materials to the audience.
 - Go For Art! - Team oriented group works together to help a "neighborhood" of artists by handing out water, information, and "Street Talk", as well as possibly running small errands for artists and staff. This year designated members of the "Go For Art!" team will also provide booth sitting for artists who are giving a demonstration or need to take a break.
 - Set-Up - Help set-up the Fair, or Tear Down - Help "strike the set". Volunteers help clear the streets of Ann Arbor.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- A demographic survey was done in 1996 by The Ann Arbor Street Art Fair.
- See Appendix B.

ECONOMIC ANALYSIS:

- CVB carries information on demographics and economic analysis.
 - In 1995 a graduate student at Eastern Michigan University produced the economic Impact of the Ann Arbor Art Fairs on Local Businesses.
 - Noted findings include: \$44 million in economic impact to Ann Arbor.
 - See Appendix B.
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Baltimore, MD

EVENT: Artscape
www.artscape.org

BUDGET: Information unavailable.

DESCRIPTION: Artscape is the Baltimore region's celebration of the arts. The festival features local, regional and national acts representing the fields of dance, fashion, theater, opera, literary arts, and film. Over 150 artisans, craftspeople and cultural exhibitors participate and street performances, family activities and culinary events are integral to the three day long event.

VENUE: Mount Royal Avenue

PRICE: FREE

DATE: July 22-24, 2005

CATEGORY: Fine Arts/Crafts

THEME: No specific theme. Festival celebrates visual, literary and performing arts each year.

ESTIMATED ATTENDENCE: Hundreds of thousands (no metric to gauge exact results)

CONTACT: Baltimore Office of Promotion and the Arts
Kathleen Hornig khornig@promotionandarts.com
410-785-8632

TARGET AUDIENCE/GROUP OR REGION MARKETING TOWARD:

- A broad cross section of the region.
- Aims to offer something different for everyone.

DISTANCE TRAVELED TO ATTEND EVENT:

A 2004 Study indicated the following distribution:

- Maryland: (89%).
- Pennsylvania, Virginia, District of Columbia, New York: (2%/ each).
- New Jersey, California, and Florida: (1%/ each).
- Remaining attendees traveled from Oklahoma, Iowa, Michigan, Tennessee, Texas, North Carolina, and Washington.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE THE EVENT:

Past attendees cited hearing about the event through the following places:

- TV/Radio: (30%).
- Word of Mouth: (28%).
- Newspaper article/ Advertisement: (22)%.
- Other: (8%).
- Website: (5%).
- Signs/Banners: (4%).
- Magazine article/ Advertisement: (3%).

VOLUNTEER SUPPORT REQUIRED:

- No specific information available.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- Demographic information is available. See Appendix C.

ECONOMIC ANALYSIS:

- None.
-

Buffalo, NY

EVENT: Allentown Art Festival
www.allentownartfestival.com

BUDGET: Information unavailable.

DESCRIPTION: The Allentown Art Festival is an annual outdoor art and crafts show that features 450 exhibitors from 35 states and Canada. It is operated by the Allentown Village Society.

VENUE: Historic Preservation District of Buffalo.
716.881.4269

PRICE: Free.

DATE: July 11-12, 2005.

CATEGORY: Fine Art/Crafts.

THEME: None.

ESTIMATED ATTENDENCE: 300,000

CONTACT: Convention and Visitors Bureau
1.800.283.3256
www.visitbuffaloniagra.com
The Community Foundation for Greater Buffalo
716.852.2857
Allentown Village Society
716.881.4269
hannahdan1@aol.com

TARGET AUDIENCE/ GROUP OR REGION MARKETING TOWARD:

No information available.

DISTANCE TRAVELED TO ATTEND EVENT:

No information available.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE EVENT:

No information available.

VOLUNTEER SUPPORT REQUIRED:

No information available.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

No information available.

ECONOMIC ANALYSIS:

No information available.

Charleston, SC

EVENT:	Spoletto Festival USA
BUDGET:	\$3.8 million.
DESCRIPTION:	This 17 day/night festival fills historic theatres, churches, and outdoor spaces with over 120 performances by renowned artists as well as emerging performers representing disciplines from opera, theatre, music, dance, and chamber, symphonic, choral and jazz music as well as the visual arts.
VENUE:	Spoletto Festival USA is the only American arts festival hosted by an entire city. The Festival takes place throughout downtown Charleston, South Carolina, in its historic theatres and churches, in front of City Hall, on the early 19 th century campus of the College of Charleston, and in the gardens of the 18 th century Middleton Place plantation.
PRICE:	\$20-\$200. Group sales available.
DATE:	May 27- June 12 2005
CATEGORY:	Theatre/Opera.
THEME:	No specific theme. Spoleto's goal is for patrons to create their own connections through the festivals presentations of opera, dance, theatre, and special series.
ESTIMATED ATTENDENCE:	70,000- 80,000/yr
CONTACT:	Spoletto Festival US PO Box 157 Charleston, SC 29402 843.722.2764 Heather Holt – Special Events Manager hholt@spoletousa.com Jennifer Harris – Public Relations jharris@spoletousa.com

TARGET AUDIENCE/GROUP OR REGION MARKETING TOWARD:

- Demographically, this festival draws an older, white crowd with a high level of education; masters or PHD.
- Most patrons have higher levels of disposable incomes.
- 40% of the attendees are local and represent a more diverse demographic.

- Currently, Spoleto is working with their CVB to diversify their audience to draw young professionals and other ethnic groups.

DISTANCE TRAVELED TO ATTEND EVENT:

- Charleston (40%).
- Rest of South Carolina (15%).
- Southeastern United States (25%).
- Rest of US and international (20%).

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE THE EVENT:

- No advertisement money spent.
- Publicity through local and national news.
- A large format brochure is sent to their mailing list.
- 75% of ticket sales come directly from their website.
- E-mail, and direct mailings of postcards are also sent out to various patron lists.
- Locally, an event called "Taste of Spoleto" is held. Free food and information on the festival is available as well as discount tickets to events. This is the only time discount tickets are available.

VOLUNTEER SUPPORT REQUIRED:

- Each year, Spoleto relies on the energy and experience of its volunteers to help make the world-class arts festival a success.
- Volunteer opportunities run from January through June.
- Specific process for volunteer application.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- South Carolina Arts Commission has produced reports on the impact of the general arts economic impact on the region. This study focus's much of its research on the Spoleto festival.
- See below.

ECONOMIC ANALYSIS:

Economic analysis has been conducted by:

The University of South Carolina's Moore School of Business, 2000.

- Attendee's spending: **\$43.1 million** in the Charleston area.
- Labor Earnings: **\$29.2 million.**
- Full time jobs: **1,628.**
- Economic Output: **\$67.8 million.**
- Total Visitor Spending: **\$43.1 million.**
- Spending by those residing outside of Charleston: (of the \$43.1 mil.) **\$31.2 million.**

See Appendix D for complete economic impact report.

Chicago, IL

EVENT: Chicago Humanities Festival

BUDGET: Information unavailable.

DESCRIPTION: A festival of ideas including authors, scholars, poets, policy-makers, artists, and performers gathered at Chicago's many cultural institutions to celebrate the power of ideas in human culture. Audience participants rediscover vital role the humanities play in their daily lives. There are over 150 events to choose from.

VENUE: Metropolitan areas of Chicago.

PRICE: \$5 each unless otherwise noted (online sale price)
\$6 at each site and FREE tickets available for teachers and students (pending availability)

DATE: Oct 30-Nov 14, 2004.

CATEGORY: Heritage/Culture.

THEME: Humanities:
2004: "Love and Marriage"
2003: "Saving and Spending"
2002: "Brains and Beauty"
2001: "Words and Pictures"

ESTIMATED ATTENDANCE: 55,000

CONTACT: Eileen Machevich
President/ Executive Producer
Eileen@chfestival.org
312-661-1028 ext. 13

TARGET AUDIENCE/GROUP OR REGION MARKETING TOWARD:

- General Public.
- Ethnic Groups.
- Tourists.

DISTANCE TRAVELED TO ATTEND EVENT:

- Majority are from the metropolitan Chicago area.
- 60-70 mile radius.
- Some attendees come from Milwaukee, which is 90 miles away.

SPECIFIC MARKETING STATGIES IN PLACE TO PROMOTE EVENT:

- A strong alliance with the Chicago Tribune.

VOLUNTEER SUPPORT REQUIRED:

- Total number of 400-500 volunteers.
- Relies heavily on volunteer support.
- Some are given stipends.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- An audience survey was done four years ago.
- Demographically, most of the attendees were either empty nesters returning to the city, or young sophisticates.

ECONOMIC ANALYSIS:

- None.
-

Chicago, IL

EVENT: The Chicago Blues Festival

BUDGET: Information unavailable.

DESCRIPTION: This four day festival offers national, international and local Blues entertainment on six stages with more than 70 performers, preceded by a month of Blues activities throughout Chicago. The Chicago Blues festival brings people of all ages, from all over the world to enjoy the blues.

VENUE: Grant Park in Downtown Chicago.

PRICE: Free.

DATE: June 9-12, 2005.

CATEGORY: Music/Blues.

THEME: All festivals are genre related.
2004: "It's About Time".

ESTIMATED ATTENDENCE: 650,000 in four days.

CONTACT: Barry Dolins
Mayors Office of Special Events and Programming
Chicago Blues Festival Coordinator
bdolins@cityofchicago.gov
312-744-0571

TARGET AUDIENCE/ GROUP OR REGION MARKETING TOWARD:

- Everyone.
- General Market.
- Blues audience.

DISTANCE TRAVELED TO ATTEND EVENT:

- 60% or majority from the Chicago area.
- International and national attendance.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE EVENT:

- Small marketing budget.
- Word of mouth most effective.
- Local radio and news cover the event for its popular interest.
- Target the blues audience by publicizing through the Blues Society.

VOLUNTEER SUPPORT REQUIRED:

- Volunteer support is limited.
- Less than 12 volunteers assist in the event.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- None.

ECONOMIC ANALYSIS:

- CVB reports \$17 million in economic activity directly related to the event, annually.
Information unavailable.
-

Chicago, IL

EVENT: Chicago Latino Film Festival
www.latinoculturalcenter.org

BUDGET: \$1 million.

DESCRIPTION: The Chicago Latino Film Festival presents more than 100 films, at theaters, community centers and universities throughout Chicago. The Festival endeavors to break the barriers of stereotypes and provoke the audience to challenge mainstream ideals of the Latino identity through film.

VENUE: Throughout the metropolitan Chicago area.

PRICE: General \$10; Student \$9.
International Latino Cultural Center Members \$8.
Festival Pass (10 admissions) \$80.

DATE: August 8-20, 2005.

CATEGORY: Heritage/Culture.

THEME: None.

ESTIMATED ATTENDENCE: 30- 35,000

CONTACT: International Latino Cultural Center of Chicago
33 E. Congress Street, Suite 401
Chicago, IL 60605-1996
312.431.1330 info@latinoculturalcenter.org

TARGET AUDIENCE/GROUP OR REGION MARKETING TOWARD:

- Everyone.
- 55% of the attendees are Latino.
- Almost all attendees are bi-lingual.
- 70% of the marketing materials are in English.
- 5,000 school children attend the event annually.

DISTANCE TRAVELED TO ATTEND EVENT:

- Attendees are mostly from Metropolitan areas of Chicago.
- Some attendee's travel from Indianapolis, Detroit, Milwaukee and St. Louis.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE EVENT:

- Radio and print are the most used tools for marketing.
- The NY Times traditionally cover the event yearly.
- There are three Spanish radio stations that market the event.
- Posters and word of mouth are also used.

VOLUNTEER SUPPORT REQUIRED:

- Through email 100+ volunteers are contacted.
- Most volunteers are interested Latinos (50-60%).
- Starting in January these volunteers fulfill a variety of duties including public relations.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- None.

ECONOMIC ANALYSIS:

- No, but budget and costs of the event are consistently analyzed.
 - It costs about \$1 million to produce the event.
 - 80% is donated money.
 - Sponsors give about 5%.
 - The Foundation for the Latino Cultural Center has a tight budget and donors are extremely important.
-

Cincinnati, OH

EVENT: Cincinnati May Festival
www.mayfestival.com

BUDGET: Information unavailable.

DESCRIPTION: The May Festival is a choral festival featuring the 150-voice May Festival Chorus, Cincinnati Symphony Orchestra and international guest performers.

VENUE: Music Hall
1241 Elm Street
Cincinnati, OH 45202

PRICE: \$11.00-\$207.00

DATE: May 20-22 & 27-28, 2005.

THEME: Music/Choral Festival.

ESTIMATED ATTENDANCE:

CONTACT: 513.381.3300 (sales office- ask for connection to adm.)
Christopher Pinelo
CPinelo@mayfestival.com
May Festival Marketing and Development Manager

TARGET AUDIENCE/ GROUP OR REGION MARKETING TOWARD:

No information available.

DISTANCE TRAVELED TO ATTEND EVENT:

No information available.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE EVENT:

No information available.

VOLUNTEER SUPPORT REQUIRED:

No information available.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

No information available.

ECONOMIC ANALYSIS:
No information available.

Columbus, OH

EVENT: Columbus Arts Festival

www.gcac.org

BUDGET: Information unavailable.

DESCRIPTION: The Columbus Arts Festival is a welcome-to-summer event in Columbus, pairing the fine artists and craftspeople with a medley of entertainment including art activities, musical performances, and food. Each year, *Sunshine Artist* magazine recognizes the Columbus Arts Festival as one of the premiere festivals in the country.

VENUE: Downtown Riverfront.

PRICE: Free. No public money funds this event.

DATE: June 2 – 5, 2005.

CATEGORY: Fine Arts and Crafts.

THEME: None.

ESTIMATED ATTENDANCE: 600,000

CONTACT: Tim Kauffman
Marketing
tkauffman@gcac.org
614-224-2606

Katie Lucas
Director of Columbus Art Festival
klucas@gcac.org
Greater Columbus Arts Council

TARGET AUDIENCE/ GROUP OR REGION MARKETED TOWARD:

- Central Ohio, Franklin and contiguous counties.
- Age bracket: 30-65.
- Those who are professional and have a disposable income.
- These people enjoy art, eating out and are active.
- Large percentage is female.

DISTANCE TRAVELED TO ATTEND EVENT:

- Mostly Central Ohio, but some do attend from outside the state. No money is spent to draw from outside the state.
- Of 391 people polled:
 - 91% from Central Ohio.
 - 6% outside of Central Ohio.
 - 3% outside of Ohio.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE EVENT:

- Event is 44 years old therefore not much focus is placed on marketing.
- Although, advertising by sponsors is the number one marketing technique.
- Print is heavily used.
- Television is also used.

VOLUNTEER SUPPORT REQUIRED:

- Over 500 people donate their time to the festival throughout the weekend.
- 2 full time staff members run the entire Coordinating Committee/Volunteer Program.
- 30 volunteers head the Coordinating Committee.
 - Coordinating Committee duties include:
 - Assist Director of Events and Event Coordinator in planning the festival.
 - Coordinating Committee is hired via resume and interview.
 - They help organize over 800 volunteers that remain on site.
 - Volunteer duties include:
 - Souvenir sales, beer sales, information tents, stagehands, and artist booth sitters.
 - Television advertisements run to make a call for volunteers.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- Exit surveys are used to monitor attendee's experiences.
- Artists are surveyed on their spending habits and sales. Many report "rough sales estimates" of \$7500+.

ECONOMIC ANALYSIS:

- Research has been done by the Columbus CVB.
 - Research not available.
-

Detroit, MI

EVENT: Ford Detroit International Jazz Festival
<http://www.detroitjazzfest.com>

BUDGET: \$1.6 million.

DESCRIPTION: The Detroit Jazz festival presents over 120 bands each Labor Day weekend on Hart Plaza in downtown Detroit. The Jazz Fest showcases widely known international artists, new and emerging artists, plus the region's top professionals, as well as high school and college groups from around the state.

VENUE: Hart Plaza
Woodward and Jefferson Avenues
Detroit, MI 48226

PRICE: FREE.

DATE: Labor Day Weekend.

CATEGORY: Music/Jazz.

THEME: None.

ESTIMATED ATTENDANCE: 550,000

CONTACT: Jeff Wilson, Operations Director, 313-963-7622
Frank Makfitano, Festival Producer and Artistic Director.

TARGET AUDIENCE/ GROUP OR REGION MARKETING TOWARD:

- Professional males and females between 35-49 have the highest reported attendance at 37% of total.
- Second highest reported attendance is the 25-34 age group at 17% of total.

DISTANCE TRAVELED TO ATTEND EVENT:

- Southeastern Michigan.
- Within a one hour drive.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE EVENT:

- \$5 million is spent on media spots including print, radio and television by sponsors.
- Generally, The Detroit International Jazz Festival heavily markets their three headliners, which are highly recognized and create the most draw.
- Entertainment sections of Detroit area newspapers advertise and cover the event.
- "Jazztimes", a national Jazz magazine also covers the event.

VOLUNTER SUPPORT REQUIRED:

- 300-400 Volunteers are in charge of:
 - Stage area security.
 - Light security.
 - Transportation.
 - Festival office.
 - Information.
 - Beverage sales.
 - Merchandise sales.
 - Decoration set-up.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- Demographic info available. See Appendix E.

ECONOMIC ANALYSIS:

- Detroit CVB has conducted economic impact research.
 - Research Unavailable.
-

Fort Wayne, IN

EVENT: The Three Rivers Festival of Fort Wayne
www.threeriversfestival.org

BUDGET: \$250,000.

DESCRIPTION: A nine day festival including an art fair, children's activities, senior events, national acts, concessions, a marketplace and parade. 2nd largest event in Indiana (behind Indy 500).

VENUE: Headwaters Park just north of downtown Fort Wayne.

PRICE: 80% of the festival is free to the public.

DATE: July 10 - 18, 2004.

CATEGORY: Fine Arts/Crafts.

THEME: A festival of arts in the park.

ESTIMATED ATTENDANCE: 500,000

CONTACT: Kathleen Alter
Executive Director
Kathleen@trfonline.org
260-426-5556

TARGET AUDIENCE/ GROUP OR REGION MARKETING TOWARD:
No information available.

DISTANCE TRAVELED TO ATTEND EVENT:
No information available.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE EVENT:
No information available.

VOLUNTEER SUPPORT REQUIRED:
No information available.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:
No information available.

ECONOMIC ANALYSIS:
No information available.

Indianapolis, IN

EVENT:	Spirit and Place Festival www.spiritandplace.org
BUDGET:	Information unavailable.
DESCRIPTION:	Spirit and Place is a major civic festival of the arts, humanities, and religion. It is a regional collaborative endeavor managed by the Polis Center at Indiana University/Purdue University, Indianapolis (IUPUI). This event highlights Indiana's traditions, community issues, and invites community building and action. This festival offers a theme and a framework for implementing events and programs that encompass each organizations mission and contributes to a broader civic conversation around Indiana's traditions, challenges and assets.
VENUE:	Various venues.
PRICE:	Mostly free. Ticket info available on web.
DATE:	November 5-21, 2004. November 4 – 20, 2005. November 3 – 19, 2006.
CATEGORY:	Culture/Heritage.
THEME:	"Building and Belonging" (2004). "Moving and Staying" (2005). "Tradition and Innovation" (2006).
ESTIMATED ATTENDANCE:	35,000 (2003).
CONTACT:	Judy 312-278-2644 (festival coordinator) Indiana University/Purdue Univ. Indianapolis Polis Center at IUPUI 317.278.1830 festival@iupui.edu

TARGET AUDIENCE/GROUP OR REGION MARKETING TOWARD:

- Generally, this event draws mostly persons over 45.
- 60% women.
- College educated.

DISTANCE TRAVELED TO ATTEND EVENT:

- Central Indiana.
- 50-60 mile radius.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE EVENT:

- No money is available for marketing.

VOLUNTEER SUPPORT REQUIRED:

- One full time staff member runs the event.
- Reportedly, they need a lot more volunteers than they have.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- None.

ECONOMIC ANALYSIS:

- None.

See Appendix F for festival brochure.

New Orleans, LA

EVENT:	New Orleans Jazz and Heritage Festival www.nojazzfest.com
BUDGET:	Information unavailable.
DESCRIPTION:	The New Orleans Jazz & Heritage Festival, a/k/a Jazz Fest, is a 10-day cultural feast in which thousands of musicians, cooks and craftspeople welcome 500,000 visitors each year. There are two main components: the <i>Louisiana Heritage Fair</i> featuring music, Louisiana cuisine, arts and crafts and the <i>Evening Concert Series</i> .
VENUE:	Fair Grounds Race Course-10 minutes from the French Quarter. The Evening Concert Series takes place at various venues throughout the city over the ten-day period.
PRICE:	\$20-\$25. Evening Concert Series ticket prices vary. Discounts available for children.
DATE:	Friday, April 23 - Sunday, May 2, 2004.
CATEGORY:	Music/Jazz.
THEME:	Local Louisiana Culture.
ESTIMATED ATTENDENCE:	500,000
CONTACT:	Steve Morrison, stevem@nojazzfest.com 504-522-4786

TARGET AUDIENCE/ GROUP OR REGION MARKETING TOWARD:

- Anyone with an interest in Louisiana music and culture.

DISTANCE TRAVELED TO ATTEND EVENT:

- 50% of the attendee's come from the New Orleans metro area and the immediate region.
- The remainder come from all over the US and Canada.
- 4% international attendees.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE EVENT:

- Word of mouth is the number one marketing strategy.
- Advertisement is not a main focus, yet does include:
 - Local newspaper advertisements.

- Bus side advertisement and banners.
- Vinyl signs hung on poles around town (maintain awareness).
- Printed Marketing Materials including a one sheet "generic brochure" printed in the fall distributed locally and mailed to a mailing list including 30,000 names and addresses.
- E-lert information updates to addresses on an e-mail list of 90,000 names.
- The New Orleans Jazz and Heritage Festival is managed by a non-profit foundation that funnels the proceeds back into its community programs, so the operating budget is kept to a minimum.

VOLUNTEER SUPPORT REQUIRED:

- Strong volunteer support from the community required.
- Participation is crucial to the success of the event.
- Hundreds of participants help with everything from manning information booths to taking tickets.
- Volunteers range in age from teenagers to retirees.
- Volunteers work on an incentive program where they receive tickets to events as they accrue hours.
- The more they work the more tickets they earn.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- The local tourism industry supplies data about the hotel occupancy and restaurant reservations.
- The local business community as a whole generates data about retail sales and other economic factors throughout the area during the event.
- The final figure representing the total economic impact on the local economy is an educated guess based on looking at all of those factors.

ECONOMIC ANALYSIS:

- In addition to looking at the data described above, which comes from outside entities, the Festival also hires an independent researcher every few years to conduct a study detailing attendee demographics and economic impact.
- Analysis not available.

Note: CITY TO HOST MUSIC INDUSTRY DURING JAZZ FEST

The City of New Orleans plans to further the impact of the New Orleans Jazz & Heritage Festival on the local music industry by hosting a music industry hospitality suite at the Fair Grounds during Jazz Fest. This will give music business professionals (locals and visitors alike) a chance to network and do business while enjoying the Fest.

Philadelphia, PA

EVENT: Philadelphia Live Arts Festival & Philly Fringe
www.livearts-fringe.org

BUDGET: \$100,000.

DESCRIPTION: This festival features a collection of nearly 150 shows, all self-produced, free from any selection process, representing every voice in the world of contemporary performance.

VENUE: Various locations in metropolitan Philadelphia.

PRICE: Price varies. Discounts available for groups and members. All-Access Membership Pass - \$650.

DATE: September 3-18, 2004, September 2-17, 2005

CATEGORY: Theatre/Opera.

THEME: Philly Fringe- open/all artists, Live Arts- contemporary performing artists.

ESTIMATED ATTENDANCE: 45,000

CONTACT: Live Arts/Philly Fringe.
Sarah Anton: sarah@livearts-fringe.org
215-413-9006

TARGET AUDIENCE/ GROUP OR REGION MARKETING TOWARDS:

- Arts interested audience.
- Younger.
- Non-traditional.
- University attendees.
- Downtowners.

DISTANCE TRAVELED TO ATTEND EVENT:

- 50% from within the city.
- 25% from PA suburbs.
- 25% outside PA and some from NJ.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE EVENT:

- Rely on different sources for marketing.
- Word of mouth the strongest strategy.
- 230 artist groups who participate are facilitated for marketing.

- E-mail system.
- There is a strong core audience that returns year to year.

VOLUNTEER SUPPORT REQUIRED:

- 300 volunteers assist in a variety of ways throughout the duration of the festival.
- Volunteers have the opportunity to gain tickets to various events as an incentive to volunteer.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- Economic.

ECONOMIC ANALYSIS:

- Pennsylvania Economy League.
 - Information not available.
-

Pittsburgh, PA

EVENT:	International Festival of Firsts
BUDGET:	\$1 million.
DESCRIPTION:	The International Festival of Firsts, a 17 day festival, features seven international performing arts companies and artists from six countries. In addition it features nine American premiere performance events. This festival is in association with the Carnegie Mellon School of Drama and complementary to the Carnegie International Exhibition .
VENUE:	Benedum Center, Byham Theatre, Harris Theatre, O'Reilly Theatre, Wood Street Galleries, Theatre Square
PRICE:	Mostly Free, some ticket purchases are required.
DATE:	October 8-24, 2004.
CATEGORY:	Theatre/Opera.
THEME:	Performing Arts, showcased and publicized as: "A Festival of US Premiers."
ESTIMATED ATTENDANCE:	20,000
CONTACT:	A project of THE PITTSBURGH CULTURAL TRUST www.pgharts.org Kevin Mahon, President of the Pittsburgh Cultural Trust. 412-471-1498 Tara Safar, safar@pgharts.org

TARGET AUDIENCE/ GROUP OR REGION MARKETING TOWARDS:

- Principally, this festival targeted local and regional audiences mainly in an 11 county area.
- 6% of the attendees are from outside the region.
- 15-20 states were represented in attendance.
- Bringing in new audiences for the arts was a main target goal.
- 25% of the ticket buyers went to one or more events.
- A broad regional and small national audience was gained by affiliations with Carnegie International.

DISTANCE TRAVELED TO ATTEND EVENT:

- Up to 200-300 mile radius.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE EVENT:

- Word of mouth.
- Press coverage, radio, print, journals.
- Package deals for tourists.

VOLUNTEER SUPPORT REQUIRED:

- Ushers located within the venues were the main volunteers.
- All other volunteering was done by members of the Pittsburgh Cultural Trusts administration.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- No specific surveys were conducted.
- There were specific criteria for success that were followed. See Appendix G.
- These results were based largely on attendance levels, national publicity and press.

ECONOMIC ANALYSIS:

- None currently.
 - Economic analysis will be done in the future.
-

Pittsburgh, PA

EVENT: Three Rivers Art Festival
www.artsfestival.net

BUDGET: Information unavailable.

DESCRIPTION: The Three Rivers Art Festival is a 50 year old, 17 day art event with a mix of free art, live music, and fine food. The most popular parts of the Three Rivers Arts Festival are the program of free concerts at Point State Park, and the vibrant artist market where artists from all over the country display and sell their wares in more than 15 different mediums.

VENUE: Downtown Pittsburgh - especially Point State Park and Gateway Plaza

PRICE: Free.

DATE: June 3-19, 2005.

CATEGORY: Fine Arts/ Crafts.

THEME: None. Main goal is to connect the community to the arts.

ESTIMATED ATTENDENCE: 600,000

CONTACT: Three Rivers Arts Festival
937 Liberty Avenue
Pittsburgh, PA 15222

Main phone number: 412.281.8723
Jane Schilling, Festival Coordinator. Ext.21
jschilling@artsfestival.net

Elizabeth Reiss, Executive Director. Ext.29
ereiss@artsfestival.net

TARGET AUDIENCE/ GROUP OR REGION MARKETED TOWARDS:

- Based on survey results:
 - Average age for attendees is 37.
 - 54% female, 45% male.
 - The family aspect of the festival is expanding including special activities targeted at drawing families.
- The festival is also trying to reach out to a newer, younger audience through concerts and changing the way that the fine arts are presented.

DISTANCE TRAVELED TO ATTEND EVENT:

- Attendees mainly from Tri-state area.
- 77% from the Allegheny area.
- 15% from outside the Pittsburgh region, within driving distance.

SPECIFIC MARKETING STRATEGIES USED TO PROMOTE THE EVENT:

- Since the festival is in its 47th year, marketing is limited.
- 100% of recognition for the festival was through word of mouth.
- CVB produces bill boards in surrounding counties to advertise.
- Print ads do appear in local papers.
- Local radio stations promote the events concert series.

VOLUNTEER SUPPORT REQUIRED:

- 200 volunteers participate.
- A call for volunteers appears in local newspapers.
- Larger corporations with established volunteer programs assist in developing volunteer groups.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- 2 audience marketing surveys indicated (2002-2003):
 - 31% of the participants indicated they were attending the festival for the first time.
 - 76% reported they had made a special trip for the festival.
 - Word of mouth was the number one way attendees had heard of the festival.

ECONOMIC ANALYSIS:

- The CVB has conducted economic research.
 - They report that \$9 million in local spending is a direct result of the Three Rivers Art Festival.
 - Over \$3.5 million is spent on hotels during the duration of the festival.
-

Rochester, NY

EVENT: Rochester Jazz Festival
www.rochesterjazz.com

BUDGET: \$300,000.

DESCRIPTION: This jazz festival is a nine day event that occurs at various venues throughout Rochester. Smaller venues are typically free of charge. The festival features over 500 acts presented in atmospheres ranging from small bars to arenas.

VENUE: Kilbourn Hall, Eastman School of Music
RIJF Club Pass Big Tent
Max of Eastman Place
Milestones
Montage Grill
Little Theatre
State St. Bar & Grill

PRICE: \$0- \$55.

DATE: June 10-18, 2005.

CATEGORY: Jazz/Music.

THEME: None.

ESTIMATED ATTENDENCE:

Because attendance to this jazz festival is at various venues it is difficult to gauge actual attendance. Paid attendance is estimated at 55,000. Free attendees are estimated at 40,000. It is not uncommon for patrons to attend multiple events, so there is some overlap in both attendance figures.

CONTACT: The Springut Group
95 Park Avenue
Rochester, NY 14607
Jeff Springut- President
585-473-4482
rs@rochesterevents.com

TARGET AUDIENCE/GROUP OR REGION MARKETED TOWARD:

- Age range of 35-54.

- Surveys indicate more females attend than males.

DISTANCE TRAVELED TO ATTEND EVENT:

- 50% of attendees are from Rochester area.
- 25% are from surrounding counties.
- 25% are from the Northeastern part of the country.

SPECIFIC MARKETING STRATEGIES:

- Approximately \$300,000 is spent to market the event.
- Media sponsors are important marketing tools.
- Intense print and television campaigns are in place.
- Cable television has not been a good source for marketing.

VOLUNTEER SUPPORT REQUIRED:

- 150+ volunteers are in charge of everything from security to hospitality.
- Volunteers attend training sessions.
- Volunteers receive incentives such as t-shirts, and tickets to various events.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- See below.

ECONOMIC ANALYSIS:

- The Greater Rochester Visitors Association indicates in a 2003 economic report that the festival creates \$800,000 in local economic spending.
-

Rochester, NY

EVENT: Park Avenue Summer Arts Festival
www.rochesterevents.com

BUDGET: Information unavailable.

DESCRIPTION: This two day festival features 300 artists and craftspeople from 23 states, 60 music/entertainment groups on 4 stages including children's activities. Recognition was given by *Sunshine Artist* magazine as a result of voting by artists who participate in the event.

VENUE: Park Avenue.

PRICE: Free.

DATE: August 6-7, 2005.

CATEGORY: Fine Arts/Crafts.

THEME: None.

ESTIMATED ATTENDANCE: 125,000 over two days.

CONTACT: The Springut Group
Jeff Springut- President
585-473-4482
rs@rochesterevents.com

TARGET AUDIENCE/GROUP AND REGION MARKETED TOWARD:

- Festival is marketing towards a regional audience.

DISTANCE TRAVELED TO ATTEND EVENT:

- 50% of the attendees are from within a ten mile radius.
- The rest of the attendees are primarily from the surrounding counties.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE THE EVENT:

- Not a lot of marketing is used on this traditional event.
- The events reputation and word of mouth have been the best marketing tools.
- 13 radio and television stations participate in the event and release 65 public broadcasting announcements 10 days prior to the event.
- This event is known as the "favorite outdoor event of the summer", and is known for its great people watching.

VOLUNTEER SUPPORT REQUIRED:

- In 2004, 150 volunteers were needed to serve as "Goodwill Ambassadors"
- Volunteers are an important part of the success of the festival, by helping artists set up their displays and keeping watch over artists' booths while they go on short breaks.
- In 2005, Festival coordinators will change the scope of the volunteer program. They discovered that they were spending more money on training the 150 volunteers, than they would if they hired a more limited, temporary staff to handle the volunteer duties.
- The new plan will temporarily employ 12-24 people to run typical volunteer duties, and these people will be advised by 2 full time staff members. Shifts will be longer and more responsibility will be held by those hired.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- Festival coordinators survey participating artists to better understand the festivals strengths and weaknesses.
 - Survey results indicate a need for heavier overnight security for the booths.
 - Control and security is admittedly a huge challenge for this outdoor event.
 - Artists also report that they typically make more sales the following weekend, when the festival moves to a smaller town outside of the Rochester area.

ECONOMIC ANALYSIS:

- GRVA has measured the event.
 - GRVA data unavailable.
-

Rochester, NY

EVENT: Rochester Music Festival
www.rochestermusicfest.com

BUDGET: Information unavailable.

DESCRIPTION: The Rochester Music Festival is a three-day music event that features rhythm and blues style music. Attendance primarily stems from the surrounding regions of Buffalo, Syracuse, and Toronto. Attendance is slowly moving into the national market.

VENUE: Genesee Valley Park

PRICE:

Friday:
Adult \$15, Child (7 to12) \$8

Saturday or Sunday:
Adult \$32, Child (7 to12) \$10

Three-Day Pass:
Adult \$59, Child (7 to12) \$22

Weekend Pass:
Adult \$49, Child (7 to12) \$17

DATE: July 15-17, 2005.

CATEGORY: Music/ R&B.

THEME: None.

ESTIMATED ATTENDANCE: Tens of Thousands.

CONTACT: City of Rochester, Special Events Department:
Stephanie Gradinger
gradngrs@cityofrochester.gov
585-428-6690

TARGET AUDIENCE/ GROUP OR REGION MARKETING TOWARD:
No information available.

DISTANCE TRAVELED TO ATTEND EVENT:
No information available.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE EVENT:

No information available.

VOLUNTEER SUPPORT REQUIRED:

No information available.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

No information available.

ECONOMIC ANALYSIS:

No information available.

Stratford, Ontario, Canada

EVENT:	Stratford Festival www.stratfordfestival.ca
BUDGET:	\$51,957,000.
DESCRIPTION:	<p>A theatre festival devoted to the works of William Shakespeare. The Stratford Festival is operated by the Shakespearean Festival of Canada.</p> <p>The Festival includes a full programme of Fringe activities, including concert recitals, discussion sessions and readings by celebrated authors. It offers an extensive programme of educational and enrichment activities for students, teachers and other patrons, and operates its own in-house school of professional artist development: the Stratford Festival Conservatory for Classical Theatre Training.</p>
VENUE:	Festival Theatre Avon Theatre Tom Patterson Theatre Studio Theatre
PRICE:	\$20-\$114.
DATE:	April-November.
CATEGORY:	Theatre/Opera.
THEME:	Shakespeare. 2005: "Saints and Sinners" featuring 15 productions on four stages, including "The Lark," "Cat on a Hot Tin Roof," and "Fallen Angels."
ESTIMATED ATTENDANCE:	600,000
CONTACT:	Kelly Tehar 519-271-0055 ext.2297 Administration 1-519-271-4040

TARGET AUDIENCE/ GROUP OR REGION MARKETING TOWARDS:

- Everyone in Canada.
- Every state in the US and more than 50 countries throughout the world.
- This event attracts 10 million visitors/yr to Ontario.

DISTANCE TRAVELED TO ATTEND EVENT:

- This event has an international audience.
- Most attendees are from Canada.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE EVENT:

- A play-on program is in place to draw the age demographic of 18-29. This program offers this age group discounted tickets in order to foster a life-long attendance to the event.
- Discount tickets are also available for families and students.

VOLOUNTEER SUPPORT REQUIRED:

- Volunteer support for this event is critical.
- Volunteers are entitled "Friends of the Festival" and range in age, yet most are considered retiree's who strongly support the performing arts.
- Friends of the Festival are accepted by application only and they try to maintain a total of no more than 200 "friends."
- The Friends of the Festival are self administered with some support from the staff.
- They are in charge of everything from information kiosks, backstage tours, and administrative support.
- "Friends" are welcome to view any open dress rehearsals free of charge.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- The festival is an integral part of its local community – the second largest industry in Stratford and the heart of a \$112 million tourism business.
- Corporate budget: \$45 million
- Community impacts:
 - Through employment, products purchased, and a variety of other economic spin-offs this festival strongly impacts its surrounding community.
 - The festival supports restaurants, hotels and stores, and provides work for young people.
 - The Stratford festival raises money for local charities.
 - Enriches the quality of life by providing an opportunity to see world-class theatre at reduced prices through the STAR program.

ECONOMIC ANALYSIS:

- The Conference Board of Canada/Canadian Tourism Research Institution (2003)
 - David Tsubouchi, Ontario's Minister of Culture did research that highlights:
 - The festival creates 3,300 jobs, 1,773 direct jobs.
 - Creates \$145 million in economic activity.
 - See Appendix H for further information.
-

Toledo, OH

EVENT: Crosby Festival of the Arts

BUDGET: \$700,000.

DESCRIPTION: Crosby Festival of the Arts is a two-day fine art show featuring 250 of North America's fine artists.

VENUE: Toledo Botanical Garden

PRICE: \$7.00 general admission, FREE to members.

DATE: June 25-26, 2005.

CATEGORY: Fine Arts/Crafts.

THEME: None.

ESTIMATED ATTENDANCE: 20,000

CONTACT: Angela Kessler
Marketing and Events manager

Toledo Botanical Garden
5403 Elmer Drive
Toledo, OH 43615
419.936.2986 development@toledogarden.org

TARGET AUDIENCE/GROUP OR REGION MARKETING TOWARD:

- Toledo region.
- Families.
- Mid-Upper class.

DISTANCE TRAVELED TO ATTEND EVENT:

- Within a 50 mile radius.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE THE EVENT:

- A lot of television advertisements.
- Radio.
- Billboards.

VOLUNTEER SUPPORT REQUIRED:

- 300 volunteers assist in every aspect of the event.

- Most volunteers are repeaters from previous years.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- Festival management survey artist to specify the festivals strengths and weaknesses.
- Artists consistently report this is the best show in the region in terms of artist services and marketing.

ECONOMIC ANALYSIS:

- None.
-

Toronto, Ontario, Canada

EVENT: Shaw Festival
www.shawfest.com

BUDGET: \$23 million.

DESCRIPTION: This festival specializes in the works of George Bernard Shaw and his contemporaries. The festival features about a dozen plays annually, presented in three venues: the Court House Theatre, the Royal George Theatre, and the modern Festival Theatre. Bernard Shaw's masterpieces and numerous Victorian dramas entertain audiences every year.

VENUE: 4181 Queen St
(Festival Theatre)
Niagara-on-the-Lake, ON
(About two hours west of Toronto and 20 minutes from Niagara Falls.)

PRICE: Tickets range between CAD \$25-CAD \$75 depending on venue, play and time of week.

DATE: April-November.

CATEGORY: Theatre/Opera.

THEME: Theatre/George Bernard Shaw.

ESTIMATED ATTENDENCE: 300,000

CONTACT: Administration
905-468-2135
800-657-1106

Odette Yazbeck, Public Relations Director
Odette@shawfest.com

TARGET AUDIENCE/GROUP OR REGION MARKETING TOWARD:

- 58% from Canada.
- 42% from US.

DISTANCE TRAVELED TO ATTEND EVENTS:

- Bordering US states and Canada.

SPECIFIC MARKETING STRATEGIES IN PLACE TO PROMOTE EVENT:

- In 2004, The Minister of Tourism and Recreation along with the Minister of Culture for the Province of Ontario announced a \$400,000 Tourism Revitalization fund for the Shaw Festival.
- The money was used to launch two simultaneous cooperative marketing initiatives: *"Ripe for Adventure,"* and *"Feast Your Eyes, Feed Your Soul"*.
- Campaign and marketing strategies also strongly target tourists by the CVB including The Shaw Festival in Niagara travel packages.
- Both of these campaigns promote overnight stays through package deals. This is possible through a partnership with the Niagara on the Lake Chamber of Commerce
- Newspaper, radio advertising and give-a-ways, billboards and website promotion are also used to promote the campaigns.

VOLUNTEER SUPPORT REQUIRED:

- 350 men and women assist The Shaw Festival through their volunteer efforts as members of "The Shaw Guild."
- Members of the Guild share a common interest in theatre, as well as a desire to contribute to The Shaw and to the community. The varied interests and skills of members provide the expertise and enthusiasm needed for almost any project.
- 2 types of support are given by the volunteers:
 - Hands-on support primarily in and around the theatres:
 - Guild members assist Shaw personnel with the Festival's outreach programs, including its backstage tours and Members' days.
 - Guild volunteers assisting with a Members' Day often have the opportunity to attend one of the day's lectures or presentations.
 - Fundraising support for events and activities in support of events and activities involved in the long-term Shaw Festival's goals.
 - Each summer, The Guild holds the two-day Shaw Show of the Arts & Crafts to raise money for The Shaw Festival Fundraiser.

SPECIFIC METRICS USED TO ASSESS FESTIVAL IMPACT:

- Yes, see economic analysis below and see Appendix I.

ECONOMIC ANALYSIS:

- Economic analysis funded by: The Government of Ontario.
Conducted by: Genovese Vanderhoof and Associates.
 - Highlights from 2003:
 - Impact on local and regional economic development: \$95,167,806.
 - Direct contributions to government revenue: \$11,317,975.
 - Job Creation: over 2,500.
 - Ticket sales: \$13,000,000.
 - Transportation, accommodations, meals, shopping etc.: \$59,152,881.
 - Each dollar spent at the Shaw Festival translated into six dollars for the region.
-

Conclusion

This report details distinctions between 22 different festivals, including the 29 noted festivals occurring in Northeast Ohio. After reviewing data on date, theme, attendance, price, target audience, marketing strategies, volunteer support, and economic impact there were certain conclusions that could be drawn. These conclusions are outlined in the ten categories below.

CATEGORIZATION

For classification purposes the festivals were categorized into six genres: Fine Arts/Crafts, Theatre/Opera, Heritage/Culture, Music/Jazz, Music/R&B, and Music/Choral. 39% of the festivals fell into the Fine Arts/Crafts genre. 25% were music related, and 21% were Theatre/Opera related. Although only 25% were music related, all of the festivals incorporated music into their festivals in some way.

THEME

Of the 22 festivals, 65% had no specific theme, and 22% contained a title formed theme. The titled themes were:

- “Love and Marriage” The Chicago Humanities Festival, Chicago.
- “It’s About Time” The Chicago Blues Festival, Chicago.
- “Building and Belonging” Spirit and Place Festival, Indianapolis.
- “A Festival of US Premieres” International Festival of Firsts, Pittsburgh.
- “Saints and Sinners” Stratford Festival, Stratford.

Also noted are three festivals who listed general categories as their themes:

- “Local Louisiana Culture” New Orleans Jazz Festival, New Orleans.
- “Contemporary Theatre” Philadelphia Live Arts & Fringe Festival, Philadelphia.
- “George Bernard Shaw” The Shaw Festival, Toronto.

Each festival in the thematic category remains unique in terms of structure and mission. The Spirit and Place festival in Indianapolis, in particular, has an interesting approach surrounding the events theme. Representing the category of Culture/Heritage, this festival sets itself apart from the rest by combining religion as a partner component. Through this pairing, Spirit and Place Festival explores a way in which an event can operate under many different partners. A collaboration of assembly’s allows this festival to be held at various venues in a catalog, pick and choose kind of format. (See Appendix F) Because so few arts and cultural festivals had any particular theme, incorporating the right component, such as the Spirit and Place festival has done, would distinguish a new festival in the environment.

ATTENDANCE

A majority of the attendance levels for all festivals, excluding those held in Northeast Ohio, fell into the 500-700,000 attendance range, followed by the 100-300,000 attendance range. Of the festivals holding these attendance ranges, 60% were held in July, 20% in June and 20% in August. Overall, the 23 festivals examined were most often held in June at 24%, July at 21% and May at 12%. (See Appendix A for matrix)

As the majority of festivals are held in the summer months, a new festival could distinguish itself by operating during another time of the year.

EVENT DURATION

Most festivals were held for a duration of either 3-4 days, or 10-25 days. The two longest festivals were the Shaw Festival and the Stratford Festival, both held in Canada and lasting eight months or longer. The two longest festivals had a highly significant impact on their local communities and were strong sources of revenue and employment as well. (See Appendix A for matrix.)

TARGET AUDIENCE/MARKETING AIM

While most interviewed stated they marketed towards everyone, their demographic reports proved that their marketing fell short for some lower income brackets. Yet, when there was a cost involved to attend a festival, various school programs were able to see breaks in price. In general, festival patrons were of higher income and education and within the age range of 35-52.

Also interesting was the strong need for most festivals to try more intensely to market towards a younger audience. Some festivals offered price breaks for college aged students, while others marketed their events as hip attractions for young professionals. This marketing intention is meant to not only sustain the life of their event, but to bring in a crowd that might be willing to spend more money and add a fresh demographic to be more strongly represented in the crowd.

DISTANCE TRAVELED TO ATTEND EVENTS

All festivals with available analysis information, 18 total, held distances traveled at least within city and regional lines. 32% of the festivals drew international attendance. These festivals included Ann Arbor Art Fair, Chicago Blues Festival, New Orleans Jazz and Heritage Festival, Shaw Festival, Spoleto USA, and The Stratford Festival. Of the remaining festivals, 16% drew audiences from within the state, 16% out of state, and 5% had national attendance. (See Appendix A for matrix)

MARKETING STRATEGIES

A majority of the festivals reviewed spent little on advertising and relied heavily upon word of mouth and advertisement from their sponsors. Many of these festivals have been operating for some time, and as such, their reputations allowed them to spend little on advertising. A common marketing tactic was to market through participating arts and cultural organizations via their mailing lists.

VOLUNTEER SUPPORT

The operation of the festivals, in most cases, was strongly reliant upon volunteer support. The most successful festivals had a common effort for building their volunteer groups into committees each volunteer could associate and define themselves with. In Toronto, The Shaw Festival has “The Shaw Guild,” in Stratford it is the “Friends of the Festival” that assist festival operations. In Rochester and Columbus, specific “Coordinating Committees” are set up to control and organize volunteers as a team, which is crucial for their success.

Some groups of volunteers meet year round developing fundraising activities to increase success of the event.

Using varying application only processes, these teams of persons could be formed based on qualification and desire to join. This type of affiliation allowed a member in such a group to assemble as members of a distinct group, increasing member identity and involvement. This benefited the festivals in terms of receiving quality volunteer help and in gaining added credibility for their festival.

METRICS USED TO ASSESS FESTIVAL IMPACT

Festivals that assessed festival impact used either exit surveys, given to patrons and participants directly within the festival, or used outside sources to conduct more specific, quantitative analysis. Most analysis was conducted by an area's Convention and Visitors Bureau, independent researchers (such as the Economy League in Pittsburgh), or local government (via independent researchers.) In most cases, metrics used to assess festival impact were economic.

ECONOMIC ANALYSIS

Most economic analysis indicated the following impacts as a result of the areas festival.

- Job creation.
 - Contributions to government revenue.
 - Transportation use.
 - Higher hotel occupancy.
 - Higher ticket sales.
 - Overall increases in local economic spending for the region.
-

	DISTANCE TRAVELED	WITHIN CITY	WITHIN REGION	IN STATE	OUT OF STATE	NATIONAL	INTERNATIONAL
NAME OF FESTIVAL	CITY						
Allentown Art Festival	Buffalo, NY	no info available					
Ann Arbor Art Fair	Ann Arbor, MI						
Artscape	Baltimore, MD						
Chicago Blues Festival	Chicago, IL						
Chicago Humanities Festival	Chicago, IL						
Chicago Latino Film Festival	Chicago, IL						
Cincinnati May Festival	Cincinnati, OH	no info available					
Columbus Arts Festival	Columbus, OH						
Crosby Festival of the Arts	Toledo, OH						
Detroit International Jazz Festival	Detroit, MI						
Festival of Firsts	Pittsburgh, PA						
New Orleans Jazz and Heritage Festival	New Orleans, LA						
Park Avenue Summer Festival	Rochester, NY						
Philadelphia Live Arts/Fringe Festival	Philadelphia, PA						
Rochester Jazz Festival	Rochester, NY						
Rochester Music Festival	Rochester, NY	no info available					
Shaw Festival	Toronto, Canada						
Spirit and Place Festival	Indianapolis, IN						
Spoletto Festival USA	Charleston, SC						
Stratford Festival	Stratford, Ontario						
Three Rivers Art Festival, IN	Fort Wayne, IN	no info available					
Three Rivers Art Festival, PA	Pittsburgh, PA						

	FESTIVAL DURATION							
		1-2 DAYS	3-4 DAYS	5-7 DAYS	7-10 DAYS	10-25 DAYS	1-2 MONTHS	OVER 2 MONTHS
NAME OF FESTIVAL								
Allentown Art Festival								
Ann Arbor Art Fair								
Artscape								
Chicago Blues Festival								
Chicago Humanities Festival								
Chicago Latino Film Festival								
Cincinnati May Festival								
Columbus Arts Festival								
Crosby Festival of the Arts								
Detroit International Jazz Festival								
Festival of Firsts								
New Orleans Jazz and Heritage Festival								
Octoberfest								
Park Avenue Summer Festival								
Philadelphia Live Arts/ Fringe Festival								
Rochester Jazz Festival								
Rochester Music Festival								
Shaw Festival								8 months
Spirit and Place Festival								
Spoletto Festival USA								
Stratford Festival								8 months
Three Rivers Art Festival, IN								
Three Rivers Art Festival, PA								

[illegible]

[illegible]

Cleveland Festival Analysis

Included in Matrix:

Total Festivals: 30

Percentages of dates held:

January: 0%

February: 0%

March: 6%

April: 3%

May: 0%

June: 6%

July: 26%

August: 20%

September: 30%

October: 3%

November: 3%

December: 3%



SURVEY RESULTS

AGE

36-50: 40%
51-64: 23%
26-35: 22%
18-25: 12%
65+: 3%

GENDER

FEMALE: 65%
MALE: 35%

MARITAL STATUS

SINGLE: 49%
MARRIED: 33%
DIVORCED/SEPARATED: 11%
PARTNERED: 4%
WIDOW(ER): 3%

RACE/ETHNICITY

AFRICAN AMERICAN: 51%
CAUCASIAN: 39%
ASIAN/PACIFIC ISLANDER: 3%
OTHER: 3%
NATIVE AMERICAN: 2%
HISPANIC/LATINO: 2%

EDUCATION

COLLEGE GRADUATE: 30%
SOME COLLEGE: 27%
GRADUATE SCHOOL: 24%
HIGH SCHOOL: 13%
TRADE/VOCATIONAL SCHOOL: 5%
OTHER: 1%

INCOME

\$30-74,999K: 49%
< \$20-29,999K: 36%
>\$75K: 15%

HOUSING

SINGLE FAMILY HOME: 47%
APARTMENT: 23%
DUPLEX/TOWNHOUSE/ROWHOME: 23%
CONDOMINIUM: 4%
OTHER: 3%

OCCUPATION

PROFESSIONAL/TECHNICAL: 40%
SALES/CLERICAL: 12%
OTHER: 12%
SKILLED/SEMI-SKILLED LABOR: 10%
HOMEMAKER/RETIRED: 8%
SELF-EMPLOYED: 7%
LOCAL/NATIONAL GOVERNMENT: 5%
STUDENT: 5%
NOT EMPLOYED: 1%

HOW DID YOU HEAR ABOUT ARTSCAPE

TV/RADIO: 30%
WORD OF MOUTH: 28%
NEWSPAPER ARTICLE/AD: 22%
OTHER: 8%
WEBSITE: 5%
SIGNS/BANNERS IN CITY: 4%
MAGAZINE ARTICLE/AD: 3%

REASON FOR ATTENDING ARTSCAPE

FOR FUN: 36%
FOR THE ART: 14%
OTHER: 14%
MUSIC/ENTERTAINMENT/SPECIFIC ARTIST: 13%
FOOD: 7%
ATTNED EVERY YEAR: 6%
NEIGHBOR: 5%
FREE EVENT: 4%
FOR THE KIDS: 1%

FAVORITE FEATURE AT ARTSCAPE

CONCERTS: 28%
ARTISTS' MARKET: 24%
DANCE: 13%
LITERARY ARTS: 7%
THEATRE: 7%
FILMS: 6%
CHILDREN'S ENTERTAINMENT: 5%
HANDS ON ARTSCAPE: 5%
OPERA: 3%
ALL FEATURES: 1%
OTHER: 1%

PLAN ON ATTENDING NEXT YEAR

YES: 87%
MAYBE/PROBABLY: 12%
NO: 1%

LOCATION

MD: 519/89%
PA: 12/2%
VA: 12/2%
DC: 10/2%
NY: 9/2%
NJ: 5/1%

CA: 4/1%

FL: 4/1%

PEOPLE ALSO TRAVELED FROM OKLAHOMA, IOWA, MICHIGAN, TENNESSEE, TEXAS,
NORTH CAROLINA AND WASHINGTON TO VISIT ARTSCAPE

MARYLAND COUNTIES

BALTIMORE CITY: 307/60%

BALTIMORE COUNTY: 108/21%

HOWARD COUNTY: 33/6%

ANNE ARUNDEL COUNTY: 20/4%

CARROLL COUNTY: 10/2%

MONTGOMERY COUNTY: 10/2%

PRINCE GEORGES COUNTY: 10/2%

HARFORD COUNTY: 10/2%

DORCHESTER COUNTY: 3/1%

PEOPLE ALSO TRAVELED FROM TALBOT, WORCHESTER, CECIL AND FREDERICK
COUNTIES

The Economic Impact of the Cultural Industry on the State of South Carolina

Introduction

Cultural activities are an important component of a region's quality of life. They provide an outlet for artistic expression and add to personal fulfillment. The arts also add to regional development in many ways. The arts are a significant force in the economy, with complex linkages throughout. Just as there is a tourism or textile industry, there is a cultural industry. It contributes to the economy in ways that can be measured. Broadly speaking, the cultural industry spends money on various kinds of inputs and produces the cultural goods or services. An analysis of this chain of economic activity reveals the breadth of the economic linkages centered on the cultural industry. This report documents the impact of cultural activities on South Carolina. In both 2000 and 2001, the arts in South Carolina, on average, directly and indirectly supported about \$700 million in wages and salaries annually, 30,000 jobs, and \$1.9 billion in economic output.

In some cases, it is possible to go beyond an analysis of the level of economic activity that is supported by the arts and look at how much economic activity is actually created by specific cultural activities. In particular, the Spoleto USA and Piccolo Spoleto festivals attract a substantial amount of spending from people outside South Carolina. This new money flowing into the state can be said to create additional earnings, jobs, and output for South Carolina, and in this case, for Charleston in particular.

The cultural industry encompasses three major activities, each examined in this report. This cultural industry triad is depicted in Figure 1. *Heritage and culture* form one side of the triad. Included in this group are museums, historical sites and parks, libraries, and K-12 arts education in South Carolina schools. Another side of the triad is *performance and exhibition* activities. Performers and perform-

Figure 1. The Cultural Industry



ing groups, galleries, and filmmaking are part of this point of the triad. The final side of the triad is the *individual artist*. The individual artist ranges from a craftsman using his/her art only for personal satisfaction to the artist performing in an international arena. Businesses surround the triad, providing services and selling goods to meet the needs of each component.

The next section provides a discussion of the economic impact results broken down by various segments of the cultural industry in South Carolina. Then, the report turns to a closer examination of the Spoleto USA and Piccolo Spoleto festivals focusing on the impact of non-South-Carolina-resident expenditures and with an updated estimate of the year 2002 impacts. An overview of the impact analysis methodology is provided in the last section, followed by concluding remarks. An extensive analysis of the surveys used to elicit information is available in the appendices.

Cultural Industry Impacts

The importance of the arts as an economic force is supported by the magnitude of its impacts on wages and salaries, jobs, and economic output in South Carolina. An extensive survey and economic analysis uncovered some surprising results.

Overall, the state's cultural industry supports about \$700 million in labor earnings, 30,000 jobs, and \$1.9 billion in output. It can be difficult to appreciate the size of these numbers, unless they are put in relative terms. The earnings impact amounts to 1.3 percent of total earnings statewide, while the employment impact represents 1.6 percent of total nonfarm employment. That is, of every \$100 of wages and salaries earned in South Carolina, \$1.30 can be linked to the cultural industry. Of every 100 jobs in the state, 1.6 are directly or indirectly linked to the arts.

Major arts-related festivals draw visitors and garner media attention for regions. The annual Spoleto Festival USA and Piccolo Spoleto in Charleston, South Carolina, rank among the most visible aspects of the cultural industry in the state. Spoleto USA was founded in 1977 as the American counterpart to the Festival dei Due Mondi—Festival of Two Worlds—in Spoleto, Italy. It is a mix of dance, theater, opera, music, and the visual arts. Piccolo Spoleto, launched in 1979 by the City of Charleston's Office of Cultural Affairs, is a modestly priced complement to the parent Spoleto Festival and provides a venue for excellent local and regional artists.

An estimated 153,500 visitors attended the two festivals in 2000. These attendees spent a total of \$43.1 million in the Charleston area. The largest expenditures were on lodging, food, and beverages. In addition to the visitor spending, the festivals themselves spent an additional \$3.8 million in South Carolina on

salaries, marketing, and other expenses. As shown in Figure 2, this spending of \$46.9 million supported a total of \$29.2 million in labor earnings, the equivalent of 1,628 full-time jobs, and \$67.8 million in economic output.

Over time, these festivals have emerged as an indispensable part of the state's cultural identity. Besides promoting the arts in South Carolina, they attract visitors from across the country and the world. For the two festivals

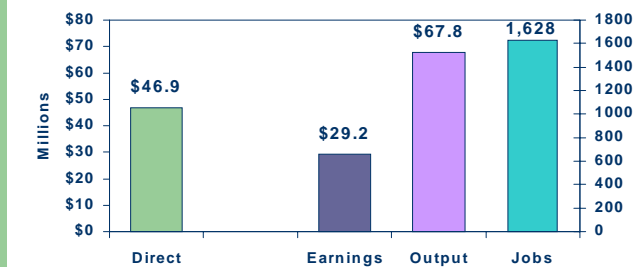
combined, 37.9 percent of attendees live outside South Carolina, while 53 percent live outside of Charleston. These are the average percentages for both festivals—the Spoleto USA festival attracts a greater percentage of nonresidents than does Piccolo Spoleto.

Not surprisingly, nonresidents spend more, on average, than either Charleston or South Carolina residents. For example, South Carolina residents spent an average of \$16.72 per day on lodging while nonresidents spent \$138.12 per day on accommodations. Because of these patterns, 61 percent of visitor spending comes from non-South Carolina residents. Meanwhile, 72.4 percent of spending comes from people living outside Charleston. Therefore, the Charleston area in particular receives a tremendous economic boost from this inflow of new money to the city. This impact is explored further in the next section.

The Charleston area also receives a significant economic boost because of the annual Southeastern Wildlife Exposition held there each February. Since attracting 5,000 visitors to the first show in 1983, the festival has grown to reach an attendance of more than 40,000. More than 37 percent of visitors travel to Charleston from outside South Carolina, another 34 percent is drawn from elsewhere in South Carolina. Spending by visitors totaled \$36.4 million, while the Southeastern Wildlife Exposition itself spent an additional \$1.8 million on various expenses. The largest categories of spending by visitors include lodging and food and beverage, though by far a majority of spending by visitors to the Southeastern Wildlife Exposition goes to purchase artwork.

When the full amount spent on artwork is included in the economic impact, the overall output impact of the festival is in excess of \$50 million. Nevertheless, a substantial portion of this money spent on artwork does not stay in South Carolina. Rather, it goes home with the artists that come from across the South-

Figure 2. Economic Impact of Spoleto USA and Piccolo Spoleto*



*Direct, Earnings, and Output plotted on left axis; Jobs plotted on right axis.

east. The impact on the South Carolina economy is, therefore, smaller. Starting with adjusted total in-state spending of \$19.8 million, the Expo supported a total of \$12.8 million in labor earnings, 670 jobs, and \$32.1 million in economic output, as seen in Figure 3.

Other festivals across the state (excluding Spoleto USA, Piccolo Spoleto, and the Southeastern Wildlife Exposition) spent a total of \$40 million in South Carolina. The largest expenditures were for personnel, materials and supplies, and marketing. Figure 4 reveals that this spending supports a total of \$27.7 million in labor earnings, 1,044 jobs, and \$105.4 million in output.

South Carolina artists spent a total of \$35.8 million on supplies and services in the state. Among the expenditure categories are materials and supplies, personnel expenditures, marketing, travel, and property expenses. Through the economic multiplier effects, the artists' activities supported a total of \$23 million in earnings, 870 jobs, and \$120.5 million of economic output. Recall, as with all segments of the cultural industry, these total impacts presented in Figure 5 encompassed impacts spread across many sectors of the state's economy, reaching well beyond the cultural industry itself.

Using data provided by the South Carolina School Districts, it is estimated that a total of \$75 million is spent on arts education for

Figure 3. Economic Impact of the Southeastern Wildlife Expo in SC*

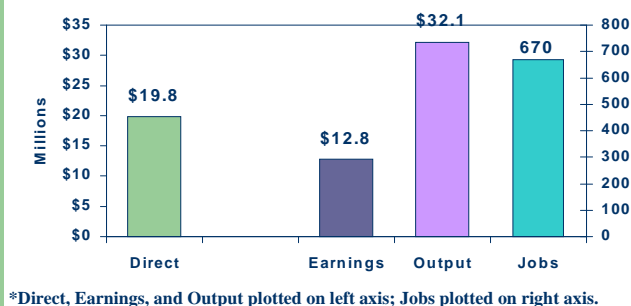


Figure 4. Economic Impact of Festivals in South Carolina*

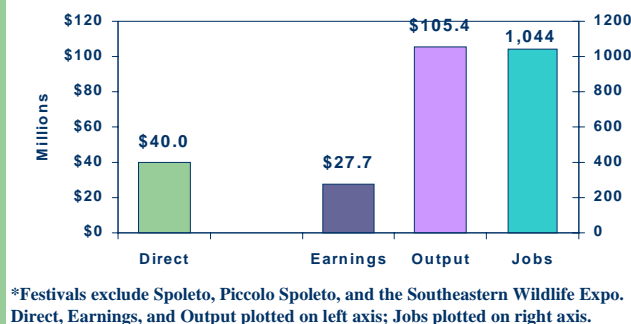
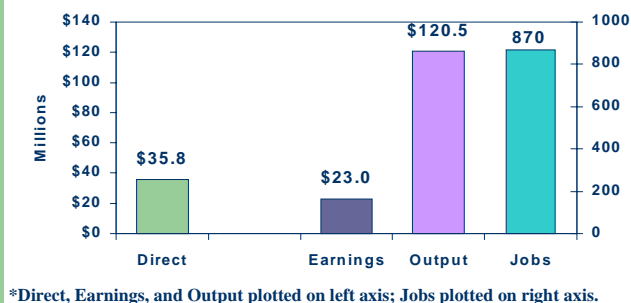


Figure 5. Economic Impact of South Carolina Artists*



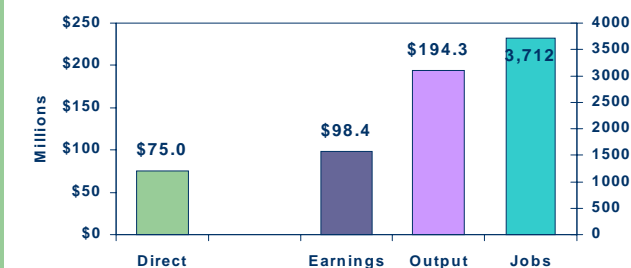
kindergartners through 12th graders in public schools. As shown in Figure 6, this expenditure by the schools, primarily in the form of salaries, supports a total of \$98.4 million in earnings, 3,712 jobs, and \$194.3 million in output.

To form a complete picture of the arts' impact, numerous types of cultural organizations were identified and surveyed. These include local arts councils, historical sites and associations, libraries, museums, parks, and other organizations. These groups had total expenditures of \$159.9 million in South Carolina. The largest expenditures of these organizations were generally for personnel, materials and supplies, property expenses, and other operating expenses. Figure 7 indicates that the operations of these organizations supported a total of \$149 million in earnings, 5,639 jobs, and \$424.9 million in economic output.

The burgeoning motion picture industry in South Carolina spent a total of \$49.1 million in the state. A majority of these expenditures represent new money to the state (that is, money spent by nonresidents). The film industry is therefore an "export" base industry, providing an injection of new business into the state's economy. Overall, as seen in Figure 8, these direct expenditures support a total of \$29.5 million in wages and salaries, 1,491 jobs, and \$74.5 million in output.

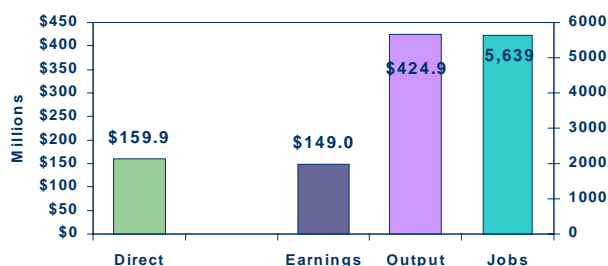
A separate survey was sent to elicit information from the for-profit segment of the cultural

Figure 6. Economic Impact of Arts Education in South Carolina*



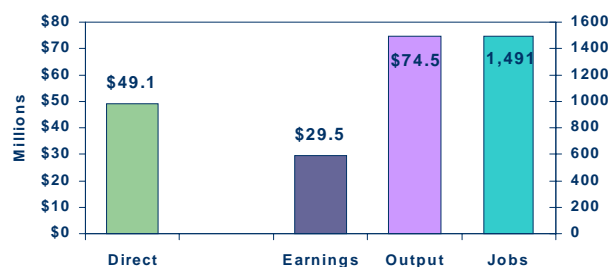
*Direct, Earnings, and Output plotted on left axis; Jobs plotted on right axis.

Figure 7. Economic Impact of Cultural Organizations in SC*



*Direct, Earnings, and Output plotted on left axis; Jobs plotted on right axis.

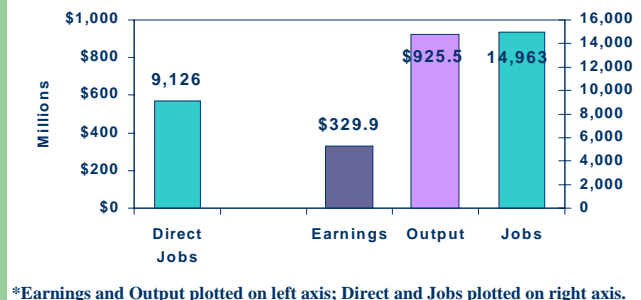
Figure 8. Economic Impact of the Film Industry in South Carolina*



*Direct, Earnings, and Output plotted on left axis; Jobs plotted on right axis.

industry. Among these businesses are art galleries, craft suppliers, dance instructors, and photographers. Estimates of full-time employment at these businesses were used to model the total economic impacts. The survey results indicate that a total of 9,126 jobs are directly linked to the for-profit cultural firms. For all other segments of the cultural industry, the estimated impacts begin with a total for direct expenditures. For the for-profit organizations, the impact model begins with the estimate of employment. Generally, these organizations fit neatly into a standard industry definition, making this an acceptable approach for modeling this segment of the cultural industry. Figure 9 shows that the amount of business activity at these firms corresponding with this level of employment results in total impacts of \$329.9 million in earnings, 14,963 jobs, and \$925.5 million worth of economic output.

Figure 9. Economic Impact of the “For-Profit” Organizations Serving the Cultural Industry in SC*



Spoletto USA and Piccolo Spoleto: Another Look

The wealth of information contained in the street surveys of attendees to the Charleston festivals makes it possible to look at two additional issues on the impact of these festivals. First, detailed information on the pattern of resident versus nonresident expenditures can be used to estimate the impacts due only to the new money coming into the state and the Charleston region. Second, the most recent surveys can be analyzed relative to previous surveys to calculate an impact estimate of the 2002 Spoleto USA and Piccolo Spoleto festivals.

Valid economic impact modeling can be performed in one of two ways. The first approach could be called an “economic linkage” approach that describes how some direct activity supports additional economic activity through the full array of industry linkages that exist in an economy. This was the approach used to calculate the impacts discussed in the previous section. This is an acceptable approach to impact analysis, as long as the effects are interpreted correctly. For example, the 30,018 jobs reported earlier are jobs that are *supported* by activities of the cultural industry. That is, these are existing jobs in the state that are related to the cultural industry through various inter-industry linkages. However, these are not necessarily new jobs that were created by the arts in South Carolina.

Report on the Survey of Festivals

Introduction

South Carolina is host to about 400 festivals annually. These range from the Salley Chitlin' Strut to the Flopeye Fish Festival and World Grits Festival. And, of course, there's Spoleto, Piccolo Spoleto, and the Southeast Wildlife Expo. Almost any town of any size in South Carolina hosts a festival. Surveys were sent to festival organizers to elicit their attitude and opinions in addition to developing the economic impact of the cultural industry. This part of the full report details the results of the survey, but excludes the results for Spoleto, Piccolo Spoleto, and the Southeast Wildlife Expo. These festivals are covered in other sections of the full report.

Profile

SC festivals have been in operation an average of 19 years. Ten percent of respondents report having been in operation less than five years, and 10 percent report operating for more than 40 years. A third of the festivals are day-long events, and one-fourth run for two days. Festivals are routinely managed by a board, the city in which they operate, or a specific group established for planning and conducting the festival. Half of the festivals report no admission fee, and 90 percent report that parking is free. Public parks or recreation areas is commonly the location for a quarter of the festivals, with privately-owned property is the location for 20 percent.

Purpose of the Festival

Festival organizers were asked to rank seven potential purposes for the festival in terms of its importance. As seen in the figure on the right, the primary purpose is to enhance community spirit. Least important among these potential purposes is the use of the festival to generate retail traffic in the local community.

All of the festivals had been held in 2000 or 2001. About 60 percent were last held in 2001. On average (for all festivals), 20,000 people attended the most recent festival. Of course, this ranges from the 20 percent of respondents who report fewer than 1,000

Rank of Possible Purposes for Festival

Raise revenue for civic projects	5
Provide recreational opportunities	3
Enhance community spirit	1
Generate retail traffic in local community	7
Educational	4
Increase tourism to community	2
Foster the arts	6

attending to 5 percent who report 125,000 or more attending. Respondents were asked to estimate the percentage of festival attendees who came from outside South Carolina, from South Carolina, from the county where the festival was held, and from the city/or town that the festival is associated with. The results of this question are:

18%	Outside South Carolina
80%	South Carolina
61%	County
44%	City/Town

Revenue/Income & Expenditures

The following table shows the total estimated revenue as well as expenditures by category for all festivals in South Carolina. The percentage of the total is shown in parentheses.

Revenue

amount of money brought in by admission sales	\$4,966,083 (9.8%)
amount of money brought in by contractual service	\$3,889,226 (7.7%)
amount of money brought in by investment and endowment income	\$1,493,355 (2.9%)
amount of money brought in by sales of goods	\$15,426,631 (30.4%)
amount of money contributed by corporations	\$20,172,454 (39.7%)
amount of money contributed by foundations	\$13,320 (<0.1%)
amount of money contributed by the government	\$3,877,146 (7.6%)
amount of money contributed from private gifts, contributions, donations	\$174,162 (0.3%)
amount of money raised by fundraisers, galas, special events	\$40,759 (<0.1%)
amount of other income	\$726,999 (1.4%)
<i>total amount of revenue/income</i>	<i>\$50,780,135 (100%)</i>

Expenditure

total expenditure on administrative personnel	\$9,677,627 (19.2%)
total expenditure on artistic personnel	\$691,626 (1.4%)
total expenditure on technical/production personnel	\$1,301,884 (2.6%)
total expenditure on artistic fees and services	\$7,485,633 (14.8%)
total expenditure on other professional services	\$2,756,760 (5.5%)
total expenditure on space rental	\$859,576 (1.7%)
total travel expenses	\$653,352 (1.3%)
total expenditure on marketing	\$6,242,552 (12.4%)
total expenditure on materials and supplies	\$6,100,444 (12.1%)
total fund raising expense	\$2,570,347 (5.1%)
total amount spent on debt interest	\$666 (<0.1%)
total amount spent on utilities	\$1,602,426 (3.2%)
total expenditure on telephone bills	\$277,609 (0.6%)
total amount spent on any other expense	\$4,830,765 (9.6%)
total amount spent on the acquisition of all kinds of cultural works	\$63,270 (0.1%)
total amount spent on property expenses	\$5,342,940 (10.6%)
<i>total expenditures</i>	<i>\$50,457,476 (100%)</i>

From this information it is clear that festivals receive most from corporations and sales of goods. In contrast, the greatest amounts spent are for administrative personnel and artistic fees and services. Expenditures on materials and supplies comprise more than 10 percent, as do expenditures for marketing. Expenditures on debt interest are virtually nonexistent. Each festival employs 2.6 fulltime equivalents (average among all festivals) and 25.6 professional artists. In addition, each festival has an average of 214

volunteers who contribute a total of 14,272 hours to assure that the festival operates as it should. The respondents estimate an average of 17 professional artists actually receive services from the festival.

Rank of Promotional Media Effectiveness

Newspaper	1
Radio	2
Television	4
Billboards	6
Brochures	7
Posters	5
Press Releases	3

Finally, respondents were asked to rank eight promotional methods that may be used to publicize the festival in terms of the effectiveness of the promotional method. The figure to the left shows the results of the ranking. In particular, respondents rate newspapers, radio, and press releases appear as most effective media for festivals. Billboards and brochures are rated as least effective.

Report on the Survey of Spoleto Visitors 2000

June 2002

Introduction

A statement of the economic impact of the cultural industry on South Carolina would be useless without including the impact of South Carolina's major arts festival—Spoleto Festival U.S.A. To this end, interviewers collected data during the 2000 Spoleto Festival U.S.A. in Charleston. The following reports these results.

Methodology

The research team developed a data collection method to assure a wide diversity of respondents in the sample group. Criteria factored into the data collection method were time of the day, day of the week, location, event type, and ticket price, and event series. With Spoleto management permission, interviewers distributed a survey instrument and pencil to potential respondents prior to the start of the event. Potential respondents were asked to turn in both (survey and pencil) as they exited the event arena. In addition, interviewers scanned audiences to visually count males and females and to approximate age and ethnic representation. This information was used to verify that the responses received from each audience were reasonably representative of that audience.

Survey data were processed using standard verification procedures and analyzed using *SPSS*.

Respondent Group

Across all Spoleto events, 1,198 respondents completed and returned surveys to the research team. Of these, one-third reside in Charleston, and 16 percent reside elsewhere in South Carolina. Less than 3 percent reside in countries outside the United States. The remainder (49 percent) reside in states other than South Carolina (34 other states and the D.C.).

*I rank it [Spoleto 24] near the top,
and give it several gold stars for
success in the face of adversity.*

Robert Jones

<http://www.charleston.net/pub/spoleto/spojones/jonewrapo613.htm>

Sixty percent of respondents completing the survey are female. This proportion remains the same across residential locations; that is, female respon-



dents from Charleston are in the same proportion as female respondents from other places in South Carolina, other states, or outside the United States.

Almost all respondents describe their ethnic background as “white”. Two percent are African American, and another 2 percent are Asian American. Other ethnicities represented are Native American, Hispanic, and Pacific Islander, each at less than 1 percent of the total. Looking at location of residence shows that a greater proportion of African American respondents are from Charleston, S.C.

The mean age of respondents is 52 years; about 20 percent are 65 years old and older. Only about 10 percent are 30 years old or younger (including 2 percent who are 18 years old and younger). Generally, respondents from outside the United States are younger (mean 41 years) than respondents from Charleston (mean 49 years), other areas of South Carolina (mean 53 years), and other states (mean 55 years).

The visual inspection encompassed audiences at performances of Chick Corea, the Colla Marionettes, Les Grandes Ballets Canadiens, Iphigenie en Tauride, Susan Marshall and Company, the Opening Ceremony, The Silver River, and the Westminster Choir. As expected, the concerts used a wide variety of performing spaces: The North Charleston Performing Arts Center, Albert Simmons Auditorium, Gaillard Auditorium, Dock Street Theatre, Sottile Theatre, Four Corners of Law, Cathedral of St. Luke and St. Paul, and the Garden Theatre. The visual inspections spanned the breadth of the Spoleto Festival from May 26 through June 10, 2001.

The table below shows the numbers observed across all performances by broad ethnic classification.

	<i>Seniors</i>	<i>Adults</i>	<i>Young Adults</i>	<i>Teens</i>	<i>Kids</i>	<i>Total</i>	<i>% of Total</i>
White male	735	939	260	17	86	2,037	39.5
White female	867	1,398	409	70	118	2,862	55.6
African American male	5	44	9	2	1	61	1.2
African American female	16	72	14	2	0	104	2.0
Other ethnicity male	3	14	10	0	3	30	0.6
Other ethnicity female	5	16	17	2	17	57	1.1
Totals	1,631	2,483	719	93	225	5,151	
Percentage of Total	31.7	48.2	14.0	1.8	4.4		

As is evident, the respondent group and the visual audience count are similar. In particular, the count shows about 40 percent male as is the respondent group. Young adults, teens, and kids compose 20 percent of the count and 10 percent of respondents. Similarly, Seniors comprise one-third of the count and 20 percent of respondents.

Results

Almost 3 percent of respondents report having attended Spoleto U.S.A. for all of its 25 years. Among all respondents, the mean number of years having attended Spoleto U.S.A. is 6.5. As may be expected, respondents from Charleston have attended the most years (mean 10), and respondents from outside the United States have attended the least years (mean 4).



Respondents from other areas in South Carolina have attended about one more year than respondents from other states (mean 6 and 5, respectively).

In general, few respondents attend Spoleto U.S.A. alone—only 7 percent report a single-member party. The typical respondent party has 3 members. About 2 percent of respondents report traveling in large groups, that is, more than 10 in the party. The smallest parties are reported by respondents from Charleston—2.5 persons. Respondents from other states report the largest parties—3.3 persons.

In response to a query about the length of the stay in Charleston to attend Spoleto U.S.A. events, almost 10 percent of respondents were somewhat ambiguous, reporting “a lot”, “many”, and “don’t know.” This suggests that respondents were staying as long as they were entertained. Among respondents who gave a specific number of days, 13 percent are in Charleston for the day of the survey only. About 15 percent of respondents expect to stay 2 days. Another 20 percent will stay 3 days, while 17 percent more will stay 4 days. About 15 percent of respondents will stay between one and two weeks. The remainder (about 5 percent) will stay almost 3 full weeks. The overall mean is 5 days attending Spoleto events. Charleston respondents report an average of 7 days; respondents from outside South Carolina report an average of 4 days; respondents in other South Carolina areas report an average of 3 days.

The typical respondent attends five to six Spoleto U.S.A. events. One-fourth of respondents attend two or fewer events, and only about 10 percent attend more than ten events. On average, respondents will attend about one event each day of their stay in Charleston: mean number of events is 5.6 and mean number of days is 5.1. Respondents from Charleston and other states attend 6 events (mean of 5.9 and 6.0, respectively) while respondents from other areas in South Carolina and outside the United States attend 4 events (mean of 4.4 and 4.0, respectively).

Of utmost importance in determining the economic impact is how much these visitors spend. Respondents were asked to indicate their spending by category for their entire stay in Charleston. The table below shows the mean dollars spent per person by category. The largest expenditures are lodging, food and beverages, and Spoleto tickets.

	<i>All Groups</i>	<i>% of Total</i>
Lodging	\$118.99	28.4
Food & Beverages	\$84.99	20.3
Crafts	\$12.66	3.0
Other Shopping	\$59.37	14.1
Parking & Local Transportation	\$9.07	2.2
Piccolo Tickets	\$16.28	3.9
Spoleto tickets	\$93.71	22.4
Other Expenses	\$24.07	5.7
Totals	\$417.09	

As would be expected, these numbers differ significantly when residence location is considered. As the following table shows, even the proportions of total expenditures differs by residence location. Red, blue, and green figures represent the largest, second largest, and



third largest, respectively, proportion of total expenditures. Spoleto attendees from Charleston spend the most on Spoleto tickets, then Food & Beverage, then Piccolo tickets. In contrast, Lodging is the greatest expenditure for Spoleto attendees from other areas in South Carolina. The second and third highest expenditures among these attendees are for Spoleto tickets and Food & Beverage, respectively. Spoleto attendees from other states are similar to those from other areas in South Carolina in that the top three expenditures are the same, with Lodging leading the group. The second and third highest expenditures, however, are flipped with Food and Beverage eking out the second position over Spoleto tickets. Interestingly, the greatest expenditure among Spoleto attendees from outside the United States is the Other category. There was no revealing information provided about this category. Second highest for these attendees is Food and Beverage. The third highest category, Lodging, was unanticipated.

	<i>Charleston Only</i>		<i>Other S.C.</i>		<i>Other State</i>		<i>Outside U.S.</i>	
	\$	%	\$	%	\$	%	\$	%
Lodging	\$6.17	2.7	\$120.09	33.0	\$158.26	32.2	\$83.84	17.0
Food & Beverage	\$54.73	23.6	\$64.95	17.8	\$98.57	20.1	\$121.92	24.7
Crafts	\$12.60	5.4	\$7.38	2.0	\$13.98	2.8	\$4.57	0.9
Other Shopping	\$9.85	4.2	\$56.04	15.4	\$78.50	16.0	\$52.81	10.7
Parking/Local Transportation	\$5.26	2.3	\$7.26	2.0	\$11.24	2.3	\$10.07	2.0
Piccolo Tickets	\$23.18	10.0	\$12.40	3.4	\$13.32	2.7	\$13.19	2.7
Spoleto Tickets	\$104.14	44.8	\$85.14	23.4	\$90.66	18.5	\$76.09	15.4
Other Expenses	\$16.41	7.1	\$10.88	3.0	\$26.34	5.4	\$131.04	26.6
<i>Totals</i>	\$232.34		\$364.14		\$490.87		\$493.53	





Demographics

Average Annual Attendance	550,000
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Gender

Male:	47%
Female:	53%

Age

under 25:	11%
25-34:	17%
35-49:	37%
50-54:	23%
65+ :	12%

Annual Personal Income

under \$15,000:	14%
\$15,000-\$24,999:	18%
\$25,000-\$34,999:	19%
\$35,000-\$44,999:	13%
\$45,000-\$54,999:	11%
\$55,000+:	6%
none	2%
did not respond	17%

Education

some/completed public school:	1%
some/completed high school:	10%
some/completed technical school:	8%
some/completed community college:	15%
some university:	20%
completed university:	23%
graduate school	23%

Occupation

professional:	22%
executive/administrative:	4%
sales:	8%
skilled/service/labor:	8%
miscellaneous:	58%

**Source 2002, Detroit Metro Convention & Visitors Bureau*

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THE PITTSBURGH CULTURAL TRUST



PITTSBURGH INTERNATIONAL FESTIVAL & FIRSTS

OVERVIEW FACT SHEET

OPERATIONS – PROGRAMATIC INITIATIVES – WORK WITH CONTEMPORARY ARTISTS

BACKGROUND

A private, non-profit organization, The Pittsburgh Cultural Trust was established in 1984 to revitalize a decaying area of the city's downtown by fostering the development of the Pittsburgh Cultural District. The Trust seeks to encourage mutually supportive cultural and economic development in and around the District, promoting the creation of distinctive, attractive, and lively environments and the cooperative programming of a diversity of performing and visual arts and entertainment attractions. The Trust also engages in comprehensive educational and outreach programs in association with local community organizations and regional interests.

SCOPE OF OPERATION

The Trust has focused its efforts on the 14-square-block Pittsburgh Cultural District, bounded by Liberty Avenue, the Allegheny River, the newly renovated David L. Lawrence Convention Center located on Tenth Street, and Stanwix Street, in downtown Pittsburgh. The Trust owns one million square feet of property in the District.

PERFORMING ARTS

Benedum Center

Opened in 1987, the 2,880-seat Benedum Center for the Performing Arts was created through the \$43 million restoration and expansion of the 1928 Stanley Theater (renamed in recognition of generous support from the Benedum Foundation). Registered with the National Trust for Historic

Places, every detail of the auditorium — from its 500,000-piece crystal chandelier to its gilded plasterwork — has been restored to its original glory. The state-of-the-art facility boasts the third largest stage house in the U.S. and is the resident home of the Pittsburgh Ballet Theatre, Pittsburgh CLO (Civic Light Opera), Pittsburgh Dance Council (which was merged into the Trust's operation in 2002), and Pittsburgh Opera. Programs, part of the Trust Presents and PNC Broadway in Pittsburgh Series, are also held in the Benedum Center, which houses rehearsal studios and backstage support spaces.

Byham Theater

Returned to active use as a performance hall in 1991, the century old Byham Theater is Pittsburgh's only extant vaudeville house. The 1,329-seat theater serves over 30 small to mid-sized performing arts companies, including dance, music, and theater ensembles. Originally opened as the Gayety on October 31, 1904, and later known as the Fulton, the Byham was renamed in 1995 in recognition of a gift from William C. and Carolyn M. Byham.

O'Reilly Theater

Designed by Michael Graves, the new \$25 million O'Reilly Theater was built as the new home of Pittsburgh Public Theater. The O'Reilly was built to accommodate the needs of the Public's artists and audiences, providing an intimate 650-seat, thrust-stage venue, comfortable backstage amenities, spacious lobby and common areas, and a flexible rehearsal studio/meeting space looking out on Penn Avenue. The O'Reilly (named in honor of former Chairman, President and CEO of the H.J. Heinz Company, Dr. Anthony J.F. O'Reilly) complements the District's larger and mid-size theaters. The O'Reilly opened to the public on December 15, 1999 with the world premiere of August Wilson's *King Hedley II*.

Harris Theater

Opened in 1995, the 194-seat Harris Theater was formerly an adult movie theater called the Art Cinema. The Trust refurbished the theater and restored its facade, creating a flexible-use space that can accommodate both cinema and performance events. The Harris is currently the downtown home of Pittsburgh Filmmakers (screening independent and foreign language films) and is named in honor of John P. Harris, who opened the first nickelodeon in Pittsburgh—possibly the first in the U.S.—in 1905.

Theater Square

At a site between The O'Reilly Theater and Agnes R. Katz Plaza, the Trust built a multi-use structure with a 250-seat cabaret (opening in fall, 2004 and programmed by the Pittsburgh Civic Light Opera); a central District box office; a new restaurant, *Café Zao*, operated by celebrated chef Toni

Pais; The Carolyn M. Byham WQED 89.3fm remote studio, which broadcasts live performances and interviews; two brightly illuminated large electronic arts promotion boards that also display original digital art presentations; as well as a 770-space parking garage. The nine-story facility, with a shell design by architect Michael Graves, accommodates additional automobile traffic in the District generated by new venues and ongoing redevelopment.

VISUAL ARTS/PUBLIC SPACES

Agnes R. Katz Plaza

Designed in conjunction with The O'Reilly Theater as a key component of the District's central Theater Square development is Agnes R. Katz Plaza (named in recognition of the generous support of the Katz family). Located at the Cultural District's main intersection at Seventh Street and Penn Avenue, the 23,000-square-foot plaza has as its centerpiece a 25-foot bronze fountain designed by sculptor Louise Bourgeois. The artist has also created a number of stone benches, in the form of giant eyes. These sculptures are set within a space designed by landscape architect Daniel Urban Kiley on the model of a formal European park, lined on three sides by 32 geometrically trimmed linden trees. Michael Graves was the consulting architect for the Katz Plaza.

Allegheny Riverfront Park

At the northern limit of the Cultural District, on a stretch of riverfront that previously served as a parking lot, the Trust has created the 4,000-foot-long Allegheny Riverfront Park, designed by artist Ann Hamilton and landscape architect Michael Van Valkenburgh. Phase One of the project, completed in the fall of 1998, was the creation of a lower-level walkway set three feet above the river's edge. The project's second phase, completed in the spring of 2001, involves the creation of a park-like promenade on the upper level, re-routing surface traffic in a new configuration that promotes public access and usage of the riverfront. Future plans call for the Allegheny Riverfront Park to connect to the David L. Lawrence Convention Center—a project designed by Rafael Viñoly.

Seventh Street & Penn Parklet

At the corner of Seventh Street and Penn Avenue, opposite Agnes R. Katz Plaza, the Trust maintains an open space used for long-term installations of public sculpture. Installations have included: *Palazzo Nudo* by Alexandr Brodsky—an assemblage of terra-cotta ornaments salvaged from historic Pittsburgh buildings that were demolished, evoking the

Comprehensive Cultural District Lighting Plan

District's rich architectural heritage; James O. Loney and David A. Ludwig's *Labyrinth*, consisting of a 830-running-feet of 30-inch-high Hicks Yew Hedge, creating a maze reminiscent of 15th century European gardens. The most recent installation (spring 2004) was *Cloud Harp*, created by Montréal-based artist and architect Nicolas Reeves, as part of the Quebec Festival, jointly sponsored by the Trust and the Quebec Government.

In 1996, the Trust commissioned artist-designer Robert Wilson and architect Richard Gluckman to develop a unified aesthetic scheme for the Cultural District. Out of that collaboration has emerged a series of proposals, intended to incorporate natural and artificial lighting projects in a singular, identifying scheme for the District.

The first project to be implemented was a 140-foot by 140-foot area of projected light on the side of 713 Penn Avenue. The light wall is composed of a sequence of single horizontal bars of light moving through a field of colored light. The bars have a slow and continuous movement from top to bottom and describe the passage of time through a sequence of positions and colors that correspond to days and seasons.

The second of these projects, implemented in winter 1999, is an enormous light panel—20 feet by 40 feet—that sits on the roof of Penn Avenue Place, an historic building at the edge of the District. The light panel uses LED technology controlled by a computer to create a huge, moving triangle of cold white light, which floats in a field of cold blue-gray light. The light panel is visible from the new PNC Park baseball stadium across the Allegheny River.

Wood Street Galleries

Through an agreement with the Port Authority of Pittsburgh, the Trust leases the upper floors of the former Max Azen Company building, above the Wood Street subway station, and operates the Wood Street Galleries. Opened in 1992, the galleries feature two floors of exhibition and performance space, and subsidized office space for emerging performing arts organizations throughout Pittsburgh. Recent installations have featured the works of contemporary artists such as Jim Campbell, Nam June Paik, Louise Bourgeois, Marina Rosenfeld and Rafael Lozano-Hemmer.

Storefront Arts Initiative

In a step to promote unique small performance and gallery spaces, the Trust developed the Storefront Arts Initiative. Three new highlights of the initiative included: a storefront “working laboratory” at 801 Liberty Avenue, entitled Future

Tenant, for Carnegie Mellon University Graduate School of Fine Arts; Urban Space Gallery, a performance venue and exhibition space for the African-American arts cooperative BridgeSpotters. A major new venue, 937 Liberty Avenue, a multi-purpose performing and visual arts space, as well as administrative offices for small arts organizations.

SPACE

The Trust acquired the property at 812-816 Liberty Avenue, restoring the building's façade to its historical past, and at street level has created another visual arts gallery, geared toward the exhibition of local and regional artists in and around Pittsburgh.

Richard Haas Mural

The Trust commissioned noted artist Richard Haas to create a mural on the north facade of the Byham Theater, introducing a striking *trompe l'oeil* image of an operational steel mill recalling Pittsburgh's industrial past.

HISTORIC PRESERVATION & PUBLIC IMPROVEMENTS

Historic Facade Restoration

After helping to secure designation as a national historic district for fifty-one 19th-century loft buildings, the Trust introduced a program to make available zero-interest loans of up to 50% of the cost for restoration of historic facades. To date, the program, with support from the Urban Redevelopment Authority and generous donors has directly been involved with 22 major façade restorations in the District, including five Trust-owned properties.

Streetscaping

The Trust, working with the City, installed new brick sidewalks, streetlights, and granite curbs, in addition to the planting of Bradford pear trees, throughout the Cultural District. Collaborating with the Pittsburgh Downtown Partnership, the Trust has also installed new waste receptacles throughout the District to maintain a clean and beautiful downtown area.

The Cultural District Banner Program

The Pittsburgh Cultural Trust continued to enhance and beautify the Cultural District by installing 100 large, colorful banners throughout the 14-square block area of downtown Pittsburgh. The banners clearly mark the perimeter and interior blocks of the District and have printed in bright, festive colors: "Cultural District: Your Show Place."

Strategic Development

The Pittsburgh Cultural Trust has long supported the development of residential projects. The 1990 Cultural District Strategic Improvement Plan commissioned by the Trust called for both new residential construction in the Cultural District as well as residential projects in the adaptive reuse of historic loft building in the Penn-Liberty Historic District.

In 1997 the Trust collaborated with Trek Development Corporation, Dollar Bank, the Strategic Investment Fund, the Urban Redevelopment Authority, and Pittsburgh Public Theater to create 25 residential units in a historic loft style building at 900 Penn Avenue. Twelve of the units house performers for the Public Theater while the other 13 units are rented at market rates. Since the project's opening in 1998, it has achieved virtual 100% occupancy.

Encouraged by the success of the 900 Penn project and based on a study by the Pittsburgh Downtown Plan which identified unsatisfied market demand for Downtown residential units, the Pittsburgh Regional Industrial Development Authority completed a 125-unit development at 915 Penn Avenue, the former CNG headquarters in 2000.

In 2004, a newly constructed 160-unit, 18-story residential building, overlooking the beautiful Allegheny River, will break ground on a Trust-owned parcel of land at Fort Duquesne Boulevard and Seventh Street. It will be the first new residential development in downtown Pittsburgh in over 30 years, and the first of its kind in the District.

Additionally, the Trust secured space to create both independent and shared offices for local cultural groups, including Pittsburgh Opera, Three Rivers Arts Festival, African American Cultural Center and Pro-Arts—an umbrella arts agency. Most recently, the Trust renovated a three-story building at 937 Liberty Avenue which will be the home to a children's theater, a writer's workshop, a gallery and the administrative offices for arts-based organizations.

ECONOMIC IMPACT

From 1984 to 2000, projects in the Cultural District generated \$79.1 million in public investment and \$155 million in philanthropic support, triggering an additional \$354 million in private development. A survey conducted in 1999 and commissioned by the Trust demonstrated that arts organizations have a \$251 million business volume impact on the City of Pittsburgh, with regional public investment in the

arts generating a 414% return through more than \$20 million in local arts-related tax revenues.

PROGRAMMING

Ongoing

The Trust independently programs multi-disciplinary presentations in its Trust Presents Series, featuring family-friendly attractions, international performances, alternative and innovative works, and showcase productions. In 2002, the Pittsburgh Dance Council became a project of the Trust, which continues to present a wide and diverse dance presentation season of world-class caliber, boasting the largest series of international dance in the city.

The Trust actively partners with the Pittsburgh Symphony Orchestra and Clear Channel Entertainment to host the PNC Broadway in Pittsburgh Series, which brings touring Broadway productions to the Benedum Center, the Byham Theater, and Heinz Hall.

Expanding International Programming

Building upon a 20-year accomplished track record of urban redevelopment in Pittsburgh, the Trust has launched a series of punctuating, international events, which include Shakespeare's Globe Theatre and the Netherlands Dans Theater during two rare U.S. tours of only five cities and the Québec Festival, a 13-week celebration of the performing and visual arts of Québec. In October 2004, the Trust will also launch a major programming initiative called *Pittsburgh International Festival of Firsts*, featuring all American premiere works from leading international contemporary performing artists, as a complement to the city's other major international cultural event – the Carnegie International exhibition at the Carnegie Museum.

EDUCATION AND COMMUNITY OUTREACH PROGRAMS

The Trust seeks to develop diverse audiences and to introduce adults and students alike to the arts. Programs include discount tickets for students, educators, senior citizens, and social service organizations; curricular materials and subsidized tickets for school performances; a volunteer usher project, internship programs; master classes; and workshops program designed to introduce high school students to the various fields of technical theater. The Trust also makes its facilities available for rental to community groups and non-profit organizations using tiered rental rates below market

value. Shared office rental is also available for artists and small cultural groups, including necessary furnishings and access to office equipment.

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2004 Budget (100%)	\$51,957,000
Budgeted Gross Ticket Revenue	\$38,599,000
Less: Discounts Provided	<u>\$3,860,000</u>
Budgeted Net Ticket Revenue (67%)	\$34,739,000
Budgeted Ancillary Revenue (14%)	<u>\$7,342,000</u>
Budgeted Earned Revenues (81%)	\$42,081,000
Budgeted Operating Expenses	\$51,957,000
Budgeted Expenses over Earned Revenues	\$9,876,000
Budgeted Annual Fundraising (14%)	\$7,070,000
Budgeted Annual Government Grants (4%)	
Canada Council for the Arts	\$765,000
Ontario Arts Council	\$1,115,000
Canadian Heritage	<u>\$150,000</u>
Total	\$2,030,000
Budgeted Endowment Foundation Transfer (1%)	\$776,000
Budgeted Support from Donors (19%)	\$9,876,000
Budgeted Net Revenue for the Year	\$0

Economic Impact on Region

Spending Attributable to Stratford Festival of Canada	\$125,000,000
Impact on Gross Domestic Product	\$145,327,000
Accommodation	\$10,348,000
Restaurants	\$8,689,000
Other Services	\$17,827,000
Estimated Taxes Generated for All Three Levels of Government	\$55,800,000
Number of Full Year Jobs Created:	
Direct	1,773
Indirect and Induced	<u>1,523</u>
Total	3,296
Wages and Salaries:	
Direct	\$50,171,000
Indirect and Induced	<u>\$46,315,000</u>
Total	\$96,486,000

The Stratford Festival thanks the individuals, corporations and governments whose generous support enables us to fulfill our mission. Without their financial commitment our operations would not be possible.

Total: 14 productions; 704 performances
Projected attendance: 595,000

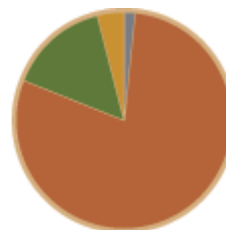
37% of box office dollar volume is from the United States.

For All Time Endowment Campaign

As of October 31, 2003

10-year goal	\$50,000,000
Funds raised to date:	
Private Donations	\$12,691,000
Stratford Festival	\$6,953,000
Ontario Arts Council Foundation	\$7,968,000
Canadian Heritage	<u>\$2,816,000</u>
Total	\$30,428,000

Percentage of Annual Total Revenue



The Stratford Festival of Canada gratefully acknowledges the generous support of these contributors to our success.

Shaw Festival Economic Impact \$95 Million in 2003

Media Release #23

Niagara-on-the-Lake, Ontario, August 12, 2004 ... The Shaw Festival generated \$95 million in economic activity for the Niagara region and the Canadian economy in 2003, according to an independent study of the Shaw Festival's operations and visitor expenditures by Genovese Vanderhoof and Associates. Shaw Festival patrons spent over \$13 million on tickets, which spun off into \$59,152,881 in relation to their festival-going activity for transportation, accommodations, meals, shopping, winery visits, golfing, spa and casino visits. The study indicates that each dollar spent at The Shaw in 2003 translated into \$6 for the Region. Almost \$23 million in expenditure by the Festival itself made up the balance of the \$95 million. The Shaw's operations also generated over \$11 million in direct contributions to government revenues.

The report also concludes that more than 91% of The Shaw's visitors came to Niagara-on-the-Lake because the Shaw Festival was located there. In 2003 it was a magnet that attracted more than 214,000 visitors, generating \$59 million in tourism spending that would not otherwise have come to the region. Of this number, 42% of visitors were from the United States, generating \$25 million in the Niagara region on accommodations, meals, winery visits and shopping.

The study highlights three key areas of impact: local and regional economic development, direct contributions to government revenue, and job creation. In addition to The Shaw's contributions to the economy and to government revenue, the study also concludes that 2500 jobs were created or supported by the Festival.

"This study reinforces the tremendous impact that the Shaw Festival has on the Niagara region, and the importance of our many partnerships with local and regional businesses," said Shaw Festival Executive Director Colleen Blake. "It should also be remembered that this study was based on 2003 figures, a year in which all tourism saw a decline because of world events. When our attendance returns to normal these numbers are expected to increase considerably."

This study was made possible through the generous support of the **Government of Ontario**.

The 2004 Season is presented by **HSBC Bank Canada/HSBC Bank USA**, and generously supported by Court House Season Partner **Acura** and Major Sponsor **Bell Canada**.

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Please visit our website at www.shawfest.com for other Shaw Festival media releases.

For more information, or to download images from our image bank to accompany this release, members of the media may contact:

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Shaw Festival Economic Impact Study

Genovese Vanderhoof and Associates

Backgrounder

Findings:

Impact on local and regional economic development:

Total Visitor Expenditures:	\$59,152,881
Visitor Ticket Expenditures:	\$13,176,299
Shaw Festival Expenditures:	\$22,838,626
Total Expenditures/Economic:	\$95,167,806

Direct contributions to government revenue:

Shaw Festival 2003 operational contributions through employee remittances, GST and PST, as well as admission related tax revenue. **Total: \$11,317,975**

Job Creation:

Niagara region service sector jobs supported: **1,183**

Shaw Festival full & part-time jobs: full-time equivalent **397**

In addition, the recent Production Centre construction generated \$18.5 million in construction related expenditure and created **280 construction related jobs**.

Expenditure Highlights:

- Shaw visitors spent over \$17 million to travel to the region, more than 90% arriving by car.
- Shaw patrons spent \$15,065,280 in the Niagara region on hotels, inns and B&Bs.
42% of one-day Shaw visitors stay overnight in the region, building to 95% of two-three day visitors, and 100% of four-plus day visitors.
- Shaw patrons spent \$15,312,533 in restaurants.

- Shopping, a favourite pastime of Shaw patrons, accounted for \$8,068,176 spent on goods and souvenirs.
- Shaw Festival patron expenditures at local wineries exceeded \$3 million in 2003.

The popularity of the Niagara wine industry and the correlation between fine wine and theatre is evidenced in Shaw Festival patrons' visits to local wineries and their commensurate expenditures. One-day visitors spend an average of \$35, which increases to \$42 per 2-3 day visitor, and \$64 per four-plus day visitor.

Study Methodology:

The study, by Genovese Vanderhoof and Associates, evaluated visitor related expenditures plus Shaw Festival operational expenditures using an input/output model. The total visitor expenditures were calculated based on the actual expenditures of a sample survey of visitors and tour operators, and is based on The Shaw's 2003 fiscal year activity. Direct and indirect economic impact includes labour income, money spent on labour, business income, money spent on goods and services and government income, and money spent on taxes. Impact on tourist and service sector employment was estimated using Stats Canada 2001 Associated Employment Estimates. Construction economic benefit was calculated in terms of the full time equivalent construction jobs created from the construction expenditures of the new Production Centre.

This study was made possible through the generous support of the **Government of Ontario**.