

ONE SUMMERLONG SENSATION ECONOMIC IMPACT ASSESSMENT

A report to the Buffalo Niagara Convention & Visitors Bureau

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TABLE OF CONTENTS

I. INTRODUCTION	2
II. BACKGROUND	3
III. SCOPE	4
IV. STUDY DESIGN	7
a. Visitors Survey	8
b. Organizational Survey	9
c. Calculating Economic Impact	9
V. ECONOMIC IMPACT FINDINGS	11
a. Total Economic Impact	11
b. Visitor Economic Impact	12
c. Organizational Economic Impact	13
VI. RELATED FINDINGS	16
a. Introduction	16
b. Visitor Profile	16
c. Trip Characteristics	17
d. Visitor Experiences	20
e. Efficacy of Marketing Campaign	20
VII. QUALITATIVE IMPACT FINDINGS	22
VIII. SUMMARY AND CONCLUSIONS	23
ADDENDUM A: Visitors Survey	24
ADDENDUM B: Organizational Survey	26
ADDENDUM C: Visitors Survey Schedule/Sample Sizes ...	30
ADDENDUM D: Glossary	31
ADDENDUM E: Bibliography	32

I. INTRODUCTION

This report has been prepared by the Institute for Local Governance and Regional Growth (Institute), a public service program of the University at Buffalo, The State University of New York, in response to the Buffalo Niagara Convention & Visitors Bureau's (BNCVB) request for an analysis of the impacts, both qualitative and quantitative, of One Summerlong Sensation, defined as a constellation of cultural tourism experiences in Buffalo Niagara during summer 2003, as well as the marketing campaign developed to promote those experiences. This report frames those impacts in terms of an analysis eight major cultural groups and a representative sampling of smaller cultural tourism events and venues occurring in Erie and Niagara Counties during summer 2003. Intended to serve as a baseline analysis, it is hoped that this report begins a regular process of data collection and economic impact assessment of the region's tourism industry.

The report primarily evaluates the direct and secondary economic impacts of the selected cultural tourism events and venues and their audiences – including both residents and tourists – for a three-month period beginning Memorial Day 2003 and

concluding Labor Day 2003. The report separately examines the impact of dollars expended in the region by tourists, defined for purposes of this report as U.S. residents from outside a 50-mile radius of Buffalo Niagara and Canadian residents.

Two surveys form the basis of the report's impact assessment – a Visitors Survey (**Addendum A**) administered to approximately 1,000 visitors at the venues and events participating in the study, and an Organizational Survey (**Addendum B**) completed by the arts, cultural and tourism organizations themselves. The surveys primarily collected information on visitor and organizational expenditures but also assembled information on visitor experiences in the region, visitor demographics, the efficacy of the One Summerlong Sensation promotional campaign, attendance figures and levels of collaboration among the organizations. These findings, as well as a qualitative impact assessment of the initiative, are also included in the report. The report is supported by consultation with the BNCVB and arts, cultural and tourism organizations, as well as research on economic impact and tourism analysis.

II. BACKGROUND

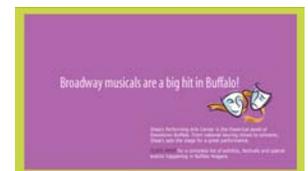
Based on the concurrence of several distinguished arts, cultural and tourism events in the Buffalo Niagara region in summer 2003, and the designation of the region as the “I Love New York Summer Festival” site, the BNCVB, eight major cultural organizations and other representative cultural groups in Erie and Niagara Counties pooled resources to launch One Summerlong Sensation. Primarily a campaign to generate awareness of the region’s wide range of cultural and tourism offerings and special events during summer 2003, One Summerlong Sensation was also an effort to foster collaboration among such organizations in the region and to improve coordination of the region’s prime venues, programs and special events.

The initiative included a collaborative marketing and public relations campaign designed to achieve greater marketing efficiency and impact. Billing the region as a place with something exciting to do every day from June to September, the marketing campaign achieved national exposure for the region’s cultural tourism assets through news articles in local and national publications, including the *New York Times*, *Washington Post* and the *Atlanta Journal-Constitution*.

Supported by nearly \$755,000 in public, private and foundational funding, \$60,000 of which was provided by the eight anchor cultural groups themselves, the BNCVB commissioned Buffalo-based Travers Collins & Co. to manage advertising and public relations for One Summerlong Sensation, thereby launching one of the region’s largest tourism marketing initiatives. Key components of the promotional campaign included:

- Press kits delivered to travel writers at hundreds of newspapers and magazines;
- One million brochures distributed to “rubber-tire” markets in both the U.S. and Canada;
- Promotional video screened for travel group planners, including the Ontario Motor Coach Association, National Tourism Association and American Bus Association;

- Local awareness campaign launched, including radio advertisements and One Summerlong Sensation travel guides distributed in the *Buffalo News*
- One Summerlong Sensation logo created and included in all promotional material;
- Events website - www.gobuffaloniagara.com – created as a source of information on venues, festivals and attractions in Buffalo Niagara;
- “Click-Off Kick-Off” e-mail marketing campaign, directed at out-of-town friends and relatives of Buffalo Niagara residents, launched before summer season. About 13,000 out-of-towners received the digital postcard invitation highlighting One Summerlong Sensation and the diversity of things to do in the region during summer 2003.



In addition to the collaborative One Summerlong Sensation publicity campaign, most cultural and tourism organizations in the region continued separate marketing efforts to promote specific summer programs and events, although the One Summerlong Sensation brand and logo was frequently referenced in organizational advertisements, press releases and other promotional material.

III. SCOPE

In designing the economic impact assessment, several variables and fundamental issues needed to be addressed at the outset of the study period before data collection could begin. Based on the Institute's extensive best practices research and consultations with the BNCVB and other arts, cultural and tourism organizations, the following parameters for this report were outlined by the BNCVB:

DEFINING ONE SUMMERLONG SENSATION. For purposes of this study, One Summerlong Sensation is defined broadly as the coming together of a wide assortment of tourism activities in Erie and Niagara Counties during summer 2003, encompassing hundreds of venues, events and organizations – from museums and festivals to amusement parks and sports events. This consortium of events and venues was also aggressively promoted by a large-scale, collaborative marketing and public relations campaign. This assessment seeks to measure the aggregate impacts, quantitative and qualitative, of the major cultural events and events in Erie and Niagara Counties, as well as a representative sampling of smaller cultural tourism events and venues, during the summer of 2003. These eight anchor groups and nine other events and venues are listed on the following page. It is important to note that, pursuant to the parameters defined for this report, the Institute has not attempted to measure the impacts of the entire cultural tourism or tourism industries, as major non-cultural events and venues and most of the region's annual festivals are not included in the study's representative sample.

MEASURED EXPENDITURES. As agreed, this report attempts to measure the economic impact of One Summerlong Sensation in the broadest sense possible. It does not seek to limit the report to narrow analyses that, for instance, measure the impact of only the initiative's joint marketing campaign, or the impact of only those dollars spent

by tourists visiting the region.¹ The economic impact analysis in this report includes:

- An analysis of the total economic impact of visitor spending at the venues and events participating in the study, as well as the spending by the organizations related to summer 2003 programming (including dollars disbursed before and during the summer);²
- Separate analyses of visitor and organizational spending and related impacts;
- Sub-analyses of "tourist" (those traveling more than 50 miles or from Canada to visit the region) and "resident" spending at the selected venues and events. It should be noted that the total economic impact does not distinguish between tourists and residents).

TIMEFRAME. The economic impact assessment includes visitor and organizational spending disbursed between the start of Memorial Day weekend - **May 24, 2003** - and the close of Labor Day weekend - **September 1, 2003**. This time period closely corresponded with the region's peak tourist season and encompassed, at least to some degree, each major exhibit or special event sponsored by participating organizations.

GEOGRAPHIC SCOPE. As virtually all One Summerlong Sensation programming took place in Erie and Niagara Counties, the bi-county region (referred to in this report as the Buffalo Niagara region) defines the geographic scope of this economic impact assessment.

PARTICIPATING ORGANIZATIONS. Seventeen organizations and events were selected to participate as a representative sample of cultural tourism activities in the region during summer 2003. Primarily, participation in the assessment meant providing access to visitors of each venue or event for survey purposes and completion of the

¹ Resident spending is typically excluded from economic impact analyses of tourism or tourism-related events on the basis that these are not "new dollars" but rather dollars that would be spent in the region anyway.

² It is important to note that in preparing for summer 2003 programming, most organizations participating in the study made substantial capital investments prior to the start of the tourist season. Therefore, in the case of the Organizational Survey, expenses related to summer programming but outlaid prior to Memorial Day were included in this economic impact analysis.

Organizational Survey. Eight of the region's major cultural institutions – or anchor organizations – were included in the study. Each of these organizations contributed funding toward the joint One Summerlong Sensation marketing campaign; as a result, these organizations and their summer programs or events were often featured more prominently in the campaign's promotional materials. (It should be noted that although these organizations launched special events or exhibits during summer 2003, spending related to their entire inventory of summer programming was included in the report's economic impact analyses). These anchor organizations are listed as follows:

Albright-Knox Art Gallery

In addition to the gallery's ongoing exhibits, Albright-Knox presented *Masterworks from The Phillips Collection* from May to September, showcasing paintings and sculptures from Renoir, Cezanne, Matisse, Degas, van Gogh and many other artists. (May - September).

Art on Wheels

This major public art exhibit linked dozens of the region's cultural, heritage and historic sites with an arts trail that featured artistically transformed automobiles and large-scale, transportation- or wheel-themed sculptures. (May - October).

Buffalo & Erie County Historical Society

In addition to its regular programming, the Historical Society launched a major exhibit this summer – *Wheels of Power* – which examines through artifacts, photographs and documents the region's distinction as the starting place of the electrical revolution. (May 2003 – May 2004).

Buffalo Museum of Science

The museum's special event of summer 2003 was *Dinomania!*, a 5,000-square-foot exhibit that featured robot dinosaurs. (May – October).

Buffalo Niagara Guitar Festival 2003

Sponsored by WNED, the Guitar Festival is the first and largest all-guitar festival in the U.S. For one week in June the region is host to a series of events featuring legendary country, blues, rock, jazz and classical guitarists. WNED began sponsoring the event in 2002.

Buffalo Philharmonic Orchestra

Although summer is typically off-season for the BPO, the group staged *Summer Symphony 2003*, featuring a series of light classical and pops concerts in several locations – outdoor and indoor – throughout the Buffalo Niagara region.

Buffalo Zoological Society

In June 2003 the Buffalo Zoo launched EcoStation, a permanent exhibit featuring the exotic habitats of the South American rainforest, the Southwestern deserts and the Australian forests.

Shea's Performing Arts Center

Also an organization that typically halts programming during the summer, Shea's staged *Forever Plaid*, a 1950s-style musical comedy, during June 2003. The performing arts center also continued its historical tours, which showcase the 76-year-old facility's elaborate Neo-Spanish baroque architecture and interior decor as well as the on-going restoration efforts.

In addition to the eight anchor groups, nine additional organizations were selected to participate in this study as a representative sample of smaller cultural, arts and tourism groups in Erie and Niagara Counties. They are as follows:

Buffalo & Erie County Naval & Military Park

The largest inland naval park of its kind in the U.S., the Buffalo & Erie County Naval & Military Park is home to a guided missile cruiser, submarine, destroyer and a range of military equipment and exhibits. Visitors can experience the history of wars as well as the daily lives of mariners and submariners.

Four Points by Sheraton, Buffalo Airport

A 300-room hotel located in Cheektowaga, off the New York State Thruway.

Graycliff

Situated on a 70-foot cliff along Lake Erie, Graycliff was designed by Frank Lloyd Wright and built between 1926 and 1927 as a summer home for Larkin Company executive Darwin D. Martin and his wife, Isabelle.

Lockport Locks & Erie Canal Cruises

Leads narrated cruise tours along the Old Erie Canal, which pass historic sites, five original 1825 locks, and rise 50-feet through the only double locks on the Erie Canal. The Canalside Heritage Center also presents canal exhibits and displays.

Motherland Connexions

An Underground Railroad heritage organization, Motherland Connexions offers tours, slideshows and mobile classrooms to bring to life the experiences of those who took the secret passageways north to Canada.

Old Fort Niagara

The site of historic battles of the Revolutionary War and the War of 1812, Old Fort Niagara provides visitors with the opportunity to relive 300 years of history through exhibits, displays and reenactments. The fort is also a registered National Historic Landmark, its structures preserved as they stood in the 1700s.

Roycroft (Roycroft Inn and Roycroft Shops)

Founded in 1895 in East Aurora, the Roycroft Arts and Crafts Community developed a self-contained community supporting hundreds of craftspeople. The Roycroft Inn, established in 1905 to accommodate visitors to the community, passed through several hands and was reopened in 1995 with National Landmark status. Through the Foundation for the Study of the Arts & Crafts Movement, the Roycroft Shops maintain museum exhibits and present workshops, seminars and lectures.

Theodore Roosevelt Inaugural National Historic Site

This National Historic Landmark is the location of Theodore Roosevelt's inauguration following the assassination of William McKinley in 1901. It offers guided tours of the former Ansley Wilcox home, special exhibits and lectures.

We Care Group

This company offers a full spectrum of ground transportation, including luxury sedans, limousines, school buses, trolleys or motorcoaches. The We Care Group offered a \$19.95 trolley tour of all downtown Buffalo Art on Wheels sites.

Thus, subsequent to the parameters established for this report, the following analyses attempt to assess the quantitative and qualitative impacts of eight anchor cultural groups and a representative sample of smaller cultural tourism venues and events within the bi-county region during summer 2003. One Summerlong Sensation also encompassed hundreds of activities and venues, including non-cultural events and other cultural tourism venues and events, which have not been included in this impact assessment.

IV. STUDY DESIGN

Based on the scope and purpose of the study, the Institute determined the following data needed to be collected to accurately measure the economic impact of the selected cultural and tourism organizations and their audiences during summer 2003:

- Visitor spending estimates for a variety of commodities and services;
- Visitor attendance levels at each of the participating events and venues (to extrapolate total economic impact of visitor spending);
- Expenditures of the participating organizations related to summer programming and disbursed either before or during One Summerlong Sensation.

The following data were also to be collected to support additional analyses related to the economic impact assessment:

- Visitor profile data, including demographic profiles and trip characteristics;
- Organizational revenue and income during summer 2003;
- Data regarding organizations' employment and volunteer levels;
- Qualitative data on collaborative initiatives, in addition to One Summerlong Sensation, undertaken by cultural, arts and tourism organizations.

The primary sources of data for this report were two surveys – a Visitors Survey (**Addendum A**) and an Organizational Survey (**Addendum B**). Although they were developed specifically for this report, they are also intended for use in subsequent, follow-up analyses to this report.

It needs to be stated at the outset that data collection among cultural and tourism organizations in Buffalo Niagara is inconsistent and incomplete. Indeed, a major theme of this report is that the region must develop a coordinated and comprehensive system for gathering, analyzing and sharing tourism data if it is to begin to assess the current picture and continue to make progress in an industry as critical

as tourism. It is hoped that this report is a step forward in that important process.

The Institute retained Cornerstone Research & Marketing, Inc., a Buffalo-based professional research firm, to assist in the development and administration of the 15-question Visitors Survey. A total of 1,026 face-to-face surveys were completed on the premises of the participating venues and events between Memorial Day and Labor Day. The Institute itself coordinated the administration of an eight-question Organizational Survey to the 17 participating organizations.

It is important to note that two organizations— Four Points by Sheraton and the We Care Group—were not asked to complete the Organizational Survey since only a small and undefinable portion of their business was related to One Summerlong Sensation. For instance, although Four Points by Sheraton provided lodging for some of the region's tourists during the summer, it did not offer summer programming per se. Likewise, the We Care Group, a major ground transportation company providing bus, limousine and shuttle services for all sectors of the community, derived only a small – and temporary – portion of its business from the Art on Wheels trolley tours. Since it was difficult to isolate the two organizations' expenses related to One Summerlong Sensation, and including their total "visitor" counts and organizational expenditures would inflate the final economic impact results of One Summerlong Sensation, the two groups were not included in the organizational economic impact analysis.

Also, five of the 17 participating organizations were unable to complete the Organizational Survey by the established deadline, originally set at September 30 but extended until December 9. Those organizations are as follows: Buffalo & Erie County Naval & Military Park, Lockport Locks & Erie Canal Cruises, Motherland Connexions, Old Fort Niagara and Roycroft. As a result, their expenditures will not be included in the final economic impact analysis. As these organizations did, however, provide estimates of total attendance, the Institute was able to determine total visitor spending at those events and venues and has included that in the final economic impact analysis.

a. Visitors Survey

Sample Size/Statistical Significance. To ensure the statistical significance of data collected by the Visitors Survey, it was important that the total number of visitors actually surveyed – the sample size – was large enough to accurately represent a cross-section, or random sample, of the typical audience of the events and venues included in the study. It should be noted that the total number of visitors to be surveyed was not intended to produce statistically significant data for each venue and event, but rather only for the aggregate audience of tourists and residents that visited the participating venues and events.

To determine the appropriate sample size, attendance estimates were provided for each participating organization from Memorial Day to Labor Day 2003. Based on these estimates, Cornerstone Research calculated a total sample size of 1,015 would provide a 95% confidence level and a maximum error of $\pm 8.5\%$. That is, data tabulated from 1,015 surveys would reflect the total population of visitors 95% of the time, with a standard deviation of $\pm 8.5\%$. The number of surveys actually conducted at each of the 17 events and venues ranged from 25 to 101 (see **Addendum C** for projected sample sizes), depending on attendance estimates submitted by the participating organizations prior to the start of One Summerlong Sensation.

Because this economic impact study would separately examine the spending of tourists—visitors here from Canada or living outside a 50-mile radius of Buffalo Niagara—as well as the spending of visitors residing in the region as subgroups of all One Summerlong Sensation visitors, the sample size for both groups needed to be independently statistically significant. Cornerstone Research’s initial survey work provided feedback on the general composition of the region’s visitor population, and suggested that a random sample of each venue and event would produce statistically significant results for analyses of these subgroups. At the end of the survey period, a total of 316 surveys were completed by visitors residing outside the region or in Canada, while 710 surveys were completed by visitors residing in the region.

Survey Design and Administration. The Institute worked with Cornerstone Research as well as the BNCVB and participating organizations in developing the Visitors Survey. The survey was administered face-to-face by Cornerstone Research staff at each of the selected venues and events, and was designed to take no longer than five minutes to complete. The 15-question survey asked visitors to estimate their group’s expenditures in the region, with different categories of spending itemized for residents and tourists. For instance, residents were asked to estimate their group or party’s event-related expenditures in the region on 1) food at restaurants and snack bars, 2) entertainment, 3) gas and public transportation and 4) shopping. Tourists were asked to estimate how much their group or party spent in the last 24 hours on 1) food at restaurants and snack bars, 2) entertainment, 3) gas, public transportation and car rentals, 4) shopping, 5) groceries 6) accommodations, and 7) other items or services. Group estimates were divided by the group size provided by each survey respondent to obtain expenditures on a per-person basis.

Survey respondents were also asked various questions about their visit to the region and the particular event they were attending, including how they heard about that event or venue; how they rated both their experience at that event or venue and their overall experience in the Buffalo Niagara region; whether and when they had heard about One Summerlong Sensation; whether they had attended or planned to attend other cultural events and venues in the region; and how many nights they planned to stay in the region and at which type of accommodations. Residents and tourists were asked different questions. For instance, residents were not asked how many nights they planned to stay in the region or how they rated their experience in the region. To develop a demographic profile of visitors, all respondents were asked to provide their age, gender and zip or postal code.

As a token of appreciation for their participation in the survey, respondents were given a magnet and pen adorned with the One Summerlong Sensation logo. Also, those survey respondents who provided their e-mail address and other demographic information were entered into a drawing to win a weekend get-away to a Buffalo Bills game.

The administration schedule (**Addendum C**) for the Visitors Survey was arranged based on input from the participating organizations, and took into account the organizations' operating hours, expected peak attendance and opening and closing dates for special events and exhibits. The schedule was designed to capture a wide range of visitors by including various time periods over the course of the summer (weekdays, weekends, mornings, afternoons, evenings and holidays).

Completed surveys were electronically coded and tabulated in SPSS, a statistical software package, with frequencies and percentages calculated for all possible answers to the questions on the survey. Cornerstone Research provided the Institute with both an electronic and hard copy of the data for further analysis.

b. Organizational Survey

Survey Design and Administration. The Institute developed the Organizational Survey in consultation with the BNCVB, participating organizations and best practices research. It was designed to 1) measure the full picture of disbursements made by each organization in relation to any and all programming during summer 2003 and 2) obtain other information related to attendance levels during summer 2003. As a result, the eight-question survey asked respondents to estimate summer programming-related expenditures disbursed both before and during the summer. To obtain the greatest level of accuracy and detail, organizations were asked to estimate spending for several categories, including:

- **Employee expenses** (wages and salaries, pension contributions, etc.);
- **Operating expenses** (accounting/bookkeeping fees, production, publication costs, legal fees, other professional/consulting fees, etc.);
- **Capital expenses** (equipment rental/purchase, computer networking, etc.);
- **Facility expenses** (rent, building services, property taxes, etc.).

Organizations were asked to estimate how much of their total expenses were disbursed to businesses, organizations and contractors outside the Buffalo Niagara region. These expenditures were excluded from the economic impact analysis, which looks only at local expenditures.

The survey also requested estimates of revenues received in relation to summer 2003 programming (earned income, contributed income, in-kind contributions). Organizations were asked to indicate whether employment fluctuated at all during summer 2003 relative to employment levels the previous summer. The survey also collected attendance information, with each of the participating organizations asked to report the total number of visitors to their venue or event between Memorial Day and Labor Day 2003, and to estimate how many of these visitors were tourists. For purposes of comparison, the survey also requested attendance estimates for a "typical" summer as well as expected attendance levels for summer 2003.

Finally, to assess the degree of collaboration among cultural and tourism groups in the region, the survey asked each organization to describe any packaging and/or joint programming campaigns or partnerships (other than the One Summerlong Sensation) pursued during summer 2003. Responses to this question could include partnerships with bus tours, hotels and other cultural/arts organizations.

The survey was distributed to the organizations on June 19, 2003. Although organizations were asked to return the completed survey to the Institute no later than September 30, 2003, this deadline was extended to December 9, 2003 for those organizations that were unable to meet the original deadline.

c. Calculating Economic Impact

IMPLAN (Impact Analysis for PLANing) is an input-output computer model used to calculate economic activity (output) generated by spending (input) in a defined geographic region. To tabulate the economic impact of the selected venues and events, visitor and organizational spending data collected in the two surveys was entered into IMPLAN, thereby calculating direct, indirect and induced economic impacts (see "Economic Impact

Terms"). The economic impact of visitor and organizational spending is expressed in terms of:

- **Economic output**, representing the value of all industry production over a period of time – in this case summer 2003;³

- **Employment**, or the average annual number of full- and part-time jobs sustained by such spending;

- **Value added**, or the sum of labor incomes (wages, salaries, benefits); indirect business taxes (primarily

ECONOMIC IMPACT TERMS:

Total economic impact is the sum of direct, indirect and induced impacts within a local economy.

Direct impacts reflect economic activity associated with dollars injected into the local economy by visitors or the organizations and businesses that directly service visitors.

Indirect impacts reflect the re-spending of dollars by businesses which support businesses impacted directly by visitor and organizational spending.

Induced impacts reflect the spending of income earned by employees who work for local businesses affected by direct and indirect impacts. Induced impacts presented are adjusted for household savings and taxes as well as commuters who are locally employed but live outside the region.

sales and excise taxes); and other property-type income (rents, dividends and royalties, etc). Multipliers are sometimes used to describe the magnitude of secondary effects (indirect and induced impacts). A multiplier of 1.5, for example, means that for every dollar injected into the local economy, an additional \$.50 is generated through various rounds of re-spending. The proportion of purchased goods that are manufactured locally is a major contributing factor of the size of a sales multiplier. If industries that support those being directly impacted are located outside the local region, then leakage of the original dollars spent here will immediately occur and there will be few secondary effects, if any. Because business interrelationships vary by industry as well as by region, it is inaccurate to apply a multiplier calculated for one region or particular mix of industries to another region or industry mix. The impacts calculated by IMPLAN are based upon multipliers that reflect inter-industry dependencies in the Buffalo Niagara region.

Report Limitations

It is important to state at the outset the various limitations and qualifications of this report.

For instance, the economic impact tabulations likely underestimate the actual economic activity generated by One Summerlong Sensation.

- This report considers the spending of and visitation to only selected venues and events during summer 2003. However, One Summerlong Sensation included the entire spectrum of such venues and events in the region. Thus a significant amount of spending occurring in the region during the summer is not included in this report.

- Of the 17 venues and events selected to participate in this study, five were unable to complete the Organizational Survey, and two were asked not to complete the survey. Thus spending from only 10 of the 17 selected organizations is included in final results.

- And finally, the figures for total direct spending by visitors, (computed by multiplying average per-person spending figures by the total audience as reported by the participating organizations) exclude total visitor spending figures for the Four Points by Sheraton hotel. Indeed, it was not possible to isolate hotel guests planning to attend tourism or tourism-related venues and events. Thus it was concluded that incorporating spending of all visitors of the hotel could grossly inflate the economic impact analysis. As a result, attendance levels from the hotel, which presumably includes cultural tourists, were not applied to the total economic impact analysis. However, data from surveys conducted at the hotel were used to compute per-person spending averages.

Conversely, certain assumptions underlying the computation of indirect and induced impacts by IMPLAN tend to overestimate the economic impact associated with the spending of the visitors and organizations included in this survey.

- In assessing induced impacts, IMPLAN assumes increases in demand for production result in proportional increases in production inputs such as labor. However, if a business responds to demand increases by using volunteers or by increasing the workload of existing employees (typical for temporary projects or events) then induced impacts calculated by IMPLAN will overstate actual impacts. Supporting this is the fact that full-time employment during One Summerlong Sensation increased only 2% from previous summer levels among the reporting organizations, while part-time employment increased 8% and the number of volunteers increased 9%.

³ Direct output is equal to direct spending if all spending is local, expenditures are made during the same year represented by the IMPLAN data, and the expenditures are not commodities manufactured outside the region where only the retail margin is treated as a local expenditure.

V. ECONOMIC IMPACT FINDINGS

a. Total Economic Impact

The total economic impact of One Summerlong Sensation reflects the direct, indirect and induced economic impacts of 1) dollars spent by the 701,793 visitors (tourists and residents) attending the 16 selected venues and events during summer 2003 and 2) expenditures of 10 organizations participating in the study and completing the Organizational Survey. Separate analyses of the economic impacts of visitor and organizational spending are presented in subsequent sections. All dollar figures presented are in 2003 dollars.

Together, spending by visitors and organizations resulted in a total output of \$75 million, as shown in **Table 1**.⁴ More than half (58% or \$43.6 million) of total output is attributable to direct spending by visitors and organizations. Those dollars leveraged

an additional \$31 million (42% of total impact) in indirect and induced economic impacts resulting from the re-spending of dollars directly injected into the region's economy by the 701,793 visitors and 10 organizations. As 84% (591,893) of visitor attendance to the participating events and venues during summer 2003 was attributable to the eight anchor cultural groups, it follows that these anchor groups leveraged a significant majority of the total economic impact.

This resulting level of economic activity supported approximately:

- 1,435 full- and part-time jobs in Erie and Niagara counties;
- \$42.4 million in total value added (labor income (73% of total), other property-type income (17% of

Table 1
Total Economic Impact
(Resulting from visitor and organizational spending - Dollars in Thousands)

	Visitors & Organizations	% Total
Output		
Direct	\$ 43,552	58%
Indirect	\$ 13,394	18%
Induced	\$ 18,041	24%
Total	\$ 74,988	100%
Value Added		
Direct	\$ 23,937	57%
Indirect	\$ 7,914	19%
Induced	\$ 10,511	25%
Total	\$ 42,363	100%
Employment (Jobs)		
Direct	\$ 1,052	73%
Indirect	\$ 169	12%
Induced	\$ 214	15%
Total	\$ 1,435	100%

Table 2
Tax Revenues

	\$ Taxes	% Tot
State Taxes		
Sales tax (state & local portion)	\$ 3,312,139	100%
Local Taxes		
Property tax	\$ 4,477	0%
Local non-property tax	\$ 461	0%
SUBTOTAL	\$ 4,938	
TOTAL	3,317,077	100%

⁴ Total economic impact is less than the sum of visitor spending impacts and organizational spending impacts. Visitor dollars spent on tickets, concessions, gifts, etc. at the participating organizations (estimated in the Visitors Survey) also represent earned revenue to the organizations and therefore funded organizations' summer expenditures. Thus, simply adding visitor and organizational economic impacts would double count visitor expenditures. To avoid this, the total organizational expenditures for summer programming were reduced by the amount of earned income the organizations received during that same time period. Thus, total impact reflects the impact of visitor spending in addition to the impact of organizations' spending over and above what they received from visitors as earned income.

Table 3

Visitor Economic Impacts

(Resulting from visitor spending - Dollars in Thousands)

	Locals (n=501,843)	Tourists (n=199,950)	All Visitors (n=710,793)	% Total
Output				
Direct	\$ 13,179	\$ 26,972	\$ 40,151	58%
Indirect	\$ 4,582	\$ 7,907	\$ 12,489	18%
Induced	\$ 5,684	\$ 11,137	\$ 16,821	24%
Total	\$ 23,446	\$ 46,016	\$ 69,462	100%
Value Added				
Direct	\$ 6,409	\$ 15,811	\$ 22,220	56%
Indirect	\$ 2,662	\$ 4,692	\$ 7,354	19%
Induced	\$ 3,312	\$ 6,488	\$ 9,800	25%
Total	\$ 12,383	\$ 26,992	\$ 39,374	100%
Employment (Jobs)				
Direct	396	620	1,016	74%
Indirect	61	97	159	12%
Induced	67	132	200	15%
Total	525	850	1,375	100%

total), and indirect business taxes (10% of total)). Direct spending by visitors⁵ generated \$3.3 million in New York State and local sales taxes (**Table 2**). Approximately \$1.7 million accrued to New York State, while \$1.6 million went to Erie and Niagara Counties. Sales tax figures were calculated by multiplying total visitor spending by the 8.25% sales tax rate. The 10 organizations responding to the Organizational Survey reported paying a total of \$6,455 in property taxes and \$461 in local, non-property taxes (e.g., municipal licenses and fees) related to summer 2003 programming.

b. Visitor Economic Impact

The more than 700,000 visitors to the 16 selected venues and events directly injected \$40.2 million into the regional economy during summer 2003, resulting in a total visitor economic impact of \$69.5 million, with 42% (\$29.2 million) representing indirect and induced economic impacts generated by the re-spending of visitor dollars.⁶ These results are presented in **Table 3**.

Specifically, the level of economic activity related to visitor spending supported:

- 1,375 full- and part-time jobs in Erie and Niagara Counties
- \$39.4 million in total value added (labor income (73% of total), property-type income (17% of total) and indirect business taxes (10% of total))

Trends in Visitor Spending. Visitors to the selected venues and events between Memorial Day and Labor Day 2003 spent a total of \$40.2 million in trip-related expenses, such as entertainment, lodging, entertainment and food (**Table 4**).

Tourists, or those from outside a 50-mile radius of Buffalo Niagara or Canada, accounted for a significant majority (75% or \$27 million) of total visitor spending, though they represented only a minority (30%) of total visitors. In contrast, residents visiting the 17 selected venues and events contributed 25% of total visitor spending, but accounted for about 70% of total visitors. It is important to note that tourists' total spending reflects spending within a 24-hour period from the time at which they were surveyed, while resident spending reflects only those expenditures related to the event at which they were surveyed.

⁵ IMPLAN was not used to determine tax revenues generated, as it was determined including taxes generated by indirect and induced economic impacts would be speculative and therefore overestimate total revenues generated through taxes.

⁶ The figures for total direct spending were computed by multiplying average per-person spending figures – obtained from the Visitors Surveys – by the total number of visitors reported by the participating organizations. All participating organizations reported attendance figures except for the Four Points Sheraton hotel, as it was not possible to isolate Four Points Sheraton guests planning to attend tourism or tourism-related venues and events. It was therefore concluded that incorporating spending of all visitors of the hotel could grossly inflate the economic impact analysis. As a result, spending data from hotel Visitors Surveys were not applied to the total economic impact analysis of visitor spending, although they were used to compute per-person spending averages.

Table 4
Direct Visitor Spending
(Dollars in Thousands)

	Locals (n=501,843)		Tourists (n=199,950)		All Visitors (n=701,793)	
		%Tot		%Tot		%Tot
Restaurants/Snacks	\$ 4,898	37%	\$ 4,587	17%	\$ 9,485	24%
Entertainment	\$ 4,863	37%	\$ 5,249	19%	\$ 10,112	25%
Gas/Public Transit	\$ 1,149	9%	\$ 2,939	11%	\$ 4,088	10%
Shopping	\$ 2,268	17%	\$ 5,181	19%	\$ 7,449	19%
Groceries	N/A	N/A	\$ 596	2%	\$ 596	1%
Accommodations	N/A	N/A	\$ 8,270	31%	\$ 8,270	21%
Other	N/A	N/A	\$ 146	1%	\$ 146	0%
Total	\$ 13,178	100%	\$ 26,967	100%	\$ 40,146	100%

Visitors spent the most on entertainment and food/restaurants – or about 49% (\$19.5 million) of total direct spending related. Accommodations were also a significant portion of total visitor spending, comprising 21% (\$8.3 million) of the total. Shopping (19% or \$7.4 million), gas and public transportation (10% or \$4.1 million) and groceries (1% or \$600,000) accounted for the remainder of visitor spending.

Residents and tourists visiting the selected venues and events showed different spending patterns. Tourists spent considerably more than residents on a per-person basis – or \$135 compared to about \$26 (Table 5). Again, this reflects the fact that tourists estimates are for a 24-hour period, while averages for visitors reflect only event related spending. Tourists spent the most, relative to total dollars spent, on accommodations (31%), while residents spent the most on entertainment (37%) and food (37%) – indeed, twice as much as tourists spent on food (17%)

and entertainment (19%). Tourists and residents spent relatively similar amounts on shopping (19% compared to 17%) and gas and public transportation (11% compared to 9%), relative to total dollars spent by each group.

c. Organizational Economic Impact

The 10 organizations and venues completing the Organizational Survey directly injected **\$7 million** into the regional economy as a result of programming during One Summerlong Sensation, leveraging a total economic impact of **\$11.2 million** (Table 6).⁷

This level of economic activity at the 10 responding organizations during One Summerlong Sensation supported:

- 119 full- and part-time jobs in Erie and Niagara counties;

Table 5
Direct Visitor Spending: Per-Person and Per-Group

	\$ Per Group				\$ Per Person			
	Locals (n=710)	%Tot	Tourists (n=316)	%Tot	Locals (n=1,875)	%Tot	Tourists (n=1,152)	%Tot
Restaurants/Snacks	\$ 19	34%	\$ 51	17%	\$ 10	37%	\$ 23	17%
Entertainment	\$ 23	41%	\$ 62	20%	\$ 10	37%	\$ 26	19%
Gas/Public Transit	\$ 5	9%	\$ 33	11%	\$ 2	9%	\$ 15	11%
Shopping	\$ 10	17%	\$ 63	21%	\$ 5	17%	\$ 26	19%
Groceries	N/A	N/A	\$ 6	2%	N/A	N/A	\$ 3	2%
Accommodations	N/A	N/A	\$ 90	29%	N/A	N/A	\$ 41	31%
Other	N/A	N/A	\$ 2	1%	N/A	N/A	\$ 1	1%
Total	\$ 57	100%	\$ 307	100%	\$ 26	100%	\$ 135	100%

⁷ Organizations participating in this study were asked to report all expenses related to summer programming, under the umbrella of One Summerlong Sensation, whether disbursed prior to Memorial Day 2003 or during One Summerlong Sensation. About twenty-five percent, or \$1.9 million, of the responding organizations' total spending was disbursed prior to Memorial Day. The majority (\$5.1 million) was outlaid during the summer.

Table 6

Organizational Economic Impacts:

(Resulting from organizational spending - Dollars in Thousands)

	Pre-Mem. Day (n=10)	Memorial Day- Labor Day (n=10)	All (n=10)	% Total
Output				
Direct	\$ 1,916	\$ 5,080	\$ 6,995	62%
Indirect	\$ 649	\$ 1,141	\$ 1,790	16%
Induced	\$ 837	\$ 1,573	\$ 2,410	22%
Total	\$ 3,401	\$ 7,794	\$ 11,195	100%
Value Added				
Direct	\$ 869	\$ 2,732	\$ 3,371	57%
Indirect	\$ 403	\$ 704	\$ 1,267	22%
Induced	\$ 488	\$ 918	\$ 1,238	21%
Total	\$ 1,759	\$ 4,354	\$ 5,877	100%
Employment (Jobs)				
Direct	22	49	71	59%
Indirect	8	13	20	17%
Induced	10	19	29	24%
Total	39	80	119	100%

• \$5.9 million in value added (labor income (67% of total), property-type income (26% of total), and indirect business taxes (7% of total)).

Trends in Organizational Spending. Employee expenditures, including wages and salaries, pension contributions and other employee benefits, comprised the greatest share – 37% or \$2.6 million – of all organizational spending relating to One Summerlong Sensation.

Operating expenses (funds dispersed for legal and other professional/consulting fees, paper and office supplies, printing and publication costs, advertising and promotion, postage, telephone, production, travel and insurance) totaled \$2.2 million, accounting for 32% of all organizational expenses.

Capital outlays - equipment purchases and rentals, computer networking, construction, depreciation, and interest payments – accounted for 25% (\$1.8

million) of all organizational expenditures. Total facility-related expenditures such as rent, building services and utilities were slight, comprising only 4% of all organizational expenses.

Organizational Revenues. Revenues received by the 10 surveyed organizations as a result of summer 2003 programming totaled \$7 million (Table 8), nearly matching total disbursements. These revenues consisted of a combination of earned revenues (74% of total revenues) and contributed income (24% of total revenues). Organizational revenues do not apply to economic impact calculations, except in that they represent the source of the dollars organizations inject into the economy.⁸

In terms of revenue sources for the 10 organizations related to summer 2003 programming, earned income – consisting of the sale of tickets, concessions, gift shop items and art – totaled 74% (\$5.2 million) of the total. Contributed income,

Table 7

Direct Organizational Spending (Dollars in Thousands)

Expenditure	Pre-Mem Day (n=10)	Mem. Day-Lab. Day (n=10)	Total (n=10)	%Tot
Employee	\$ 196	\$ 2,415	\$ 2,611	37%
Operating	\$ 247	\$ 1,988	\$ 2,235	32%
Capital	\$ 1,439	\$ 327	\$ 1,766	25%
Facility	\$ 2	\$ 257	\$ 259	4%
Other	\$ 34	\$ 117	\$ 151	2%
Total (excludes taxes)	\$ 1,918	\$ 5,104	\$ 7,022	100%

Table 8
Organizational Revenues
(Dollars in Thousands)

	(n=10)	%SubTot	%Tot
Earned Income			
Ticket sales/admissions	\$ 3,790	73%	54%
Concession sales	\$ 332	6%	5%
Gift shop sales	\$ 1,017	20%	15%
Sale of art (non-gift shop)	\$ 68	1%	1%
SUBTOTAL	\$ 5,206	100%	74%
Contributed Income			
Federal/state/local grants	\$ 187	10%	3%
Foundations and corporate grants	\$ 867	48%	12%
Individual contributions	\$ 397	22%	6%
Fundraising events	\$ 338	19%	5%
SUBTOTAL	\$ 1,790	100%	26%
TOTAL	6,996		100%

including public grants, corporate grants, foundation giving, individual contributions and fundraising event revenues, totaled \$1.8 million.

The ratio of earned income to contributed income indicates the degree to which organizations can leverage their contributed dollars with earned income. For these 10 organizations, the earned income/contributed income ratio is 2.9. In other words, for every grant dollar received, these organizations generated \$2.90 in earned revenues. This is likely due to the level of volunteerism and in-kind contributions at these organizations, both of which were substantial. Indeed, the 10 organizations reported a total of 2,216 volunteers between Memorial Day and Labor Day, an increase of almost 10% from the previous summer. In-kind contributions – from automobiles to signage printing to 60 dozen cookies – made to these organizations valued more than \$280,000. This figure likely underestimates the level of in-kind contributions to these 10 organizations, some of which were unable to estimate the dollar value of donated time and resources.

⁸ As mentioned earlier in the report, when tabulating total economic impact (of visitor and organizational spending) earned income was subtracted from the total organizational spending figures because these dollars were accounted for when determining the economic impact of visitor spending.

VI. RELATED FINDINGS

a. Introduction

In addition to providing spending data, visitors were asked to answer questions related to their demographics (Visitor Profile); the characteristics of their visit (Trip Characteristics); their experience at the event or venue as well as within the Buffalo Niagara region, including their plans to attend other venues and events in the region (Visitor Experiences); and, to help gauge the impact of the One Summerlong Sensation marketing campaign, the medium or media which informed them of the event or venue (Efficacy of Marketing Campaign). Visitors were also given the option to provide their e-mail address for marketing purposes. The BNCVB will enter those e-mail addresses into a lottery for a weekend visit to the region for a Buffalo Bills game.

Such data are important supplements to the economic impact findings, as they expand the region's understanding of its current tourism market. For instance, the data help to establish a baseline profile of the "typical" visitor of the region's cultural, arts and heritage venues and events, and to decipher trends in visitation to the region and its various venues and events. The analysis of a visitor's source of information about a venue and event proved useful in qualitatively analyzing the efficacy of the One Summerlong Sensation marketing campaign.

In summary, visitors to the 17 venues and events selected to participate in this study 1) represented a population on average older than that of the Buffalo Niagara region, 2) were more often female, 3) were most likely to travel in groups of three or more and 3) were more often local, hailing from within a 50-mile radius of the region and 4) among tourists, stayed in the region an average of two nights or fewer, and most frequently lodged in hotels or with friends or relatives.

b. Visitor Profile

i. Points of Origin

More than two-thirds of all visitors surveyed were residents, reporting that they live within a 50-mile radius of Buffalo Niagara or the event at which they were surveyed, or are from Canada. This estimate

Figure 1

Visitor Origin, by Zip/Postal Code

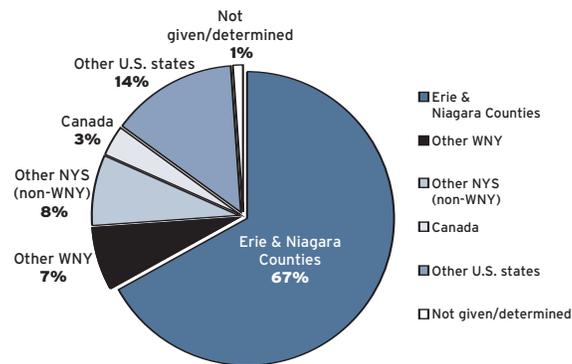


Table 9

Visitor Zip/Postal Codes

Point of Origin	Number	%Tot
Erie or Niagara Counties	687	67%
Other 6 WNY counties	70	7%
Total WNY	757	74%
Other NYS locations (non-WNY)	79	8%
Total NYS	836	81%
Canada	34	3%
Other U.S. states	144	14%
"Drive" markets (OH, PA, NJ, CT, MA, VT)	47	5%
Total Canada & other U.S. states	178	17%
Other non-Canadian countries (Germany)	1	0%
Zip code not given/can't be determined	11	1%

is consistent with attendance estimates of the 16 surveyed organizations, which reported that, on average, tourists comprise 28% of their audience base (although the total number of tourists estimated for each venue and event varied from fewer than 5% to about 80% of the total number of visitors).

A specific GIS (geographic information systems) analysis of visitors' points of origin (Figure 1, Table 9) shows that a significant majority – 74% of all visitors – reside in Western New York, with 67% from Erie and Niagara Counties and 7% from the six other Western New York Counties (Allegany,

Cattaraugus, Chautauqua, Genesee, Orleans and Wyoming Counties).⁹ Although Canada is just across the Niagara River, only about 3% of the surveyed visitors are Canadian. These low numbers could be related to the SARS scare in Toronto in spring 2003 and tighter security at the region's border crossings as a result of U.S. anti-terrorism policies.

Other New York State residents accounted for 8% of all visitors to the selected venues and events. Tourists from 39 different states, including California, Hawaii, Washington, South Dakota and Alabama, traveled to the region during summer 2003, representing 14% of all visitors. About 1 in 3 "out-of-staters" originated from the drive markets of Ohio, Pennsylvania, New Jersey, Connecticut, Massachusetts and Vermont.

ii. Gender and Age

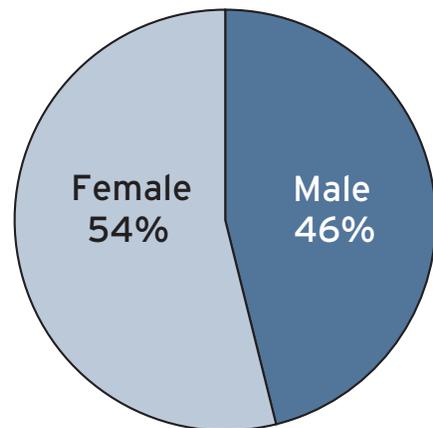
Visitors responding to the survey were also asked to report their gender and age. Women were slightly more represented than men (54% compared to 46%) at the 17 venues and events. This closely represents the proportion of females in Buffalo Niagara's population, which is about 52% according to the latest U.S. Census data.

In terms of age, visitors to the 17 events and venues tended to be older than the average resident of Buffalo Niagara. For instance, while 72% of all visitors were 35 or more years old, only 55% of Buffalo Niagara's population is older than 35. This diversion likely is a result of the Visitors Survey administration process, which solicited the age of only the survey respondent as opposed to all members of the group or family. This might have excluded children, who are less likely to complete a survey on behalf of their group or family, thus skewing upward the average age of respondents.

c. Trip Characteristics

Visitors were asked to provide information characterizing their visit to the region or event.

Figure 3
Visitor Gender



Tourists (visitors from outside a 50-mile radius of the region or from Canada) were asked to report the length of their stay and the type of accommodations used, while all visitors were asked to state the number of people in their group or party and indicate which other events and venues they had already attended or planned to attend in Buffalo Niagara during summer 2003.

i. Length of Stay

Data revealed interesting patterns in overnight stays in the region – specifically, in the "Buffalo area" and the "Niagara Falls area."¹⁰ On average, the majority (55%) of tourists visiting the selected venues and events planned to stay in either the Buffalo or Niagara Falls areas for two nights or fewer. Approximately 20% said they planned to stay in the region exactly two nights, while 20% indicated they would stay only one night. Approximately 23% reported they had plans to visit the region for only the day.

More specifically, visitors were more likely to stay overnight in the Buffalo area (70% planned to stay at least one night) than in the Niagara Falls area (14%

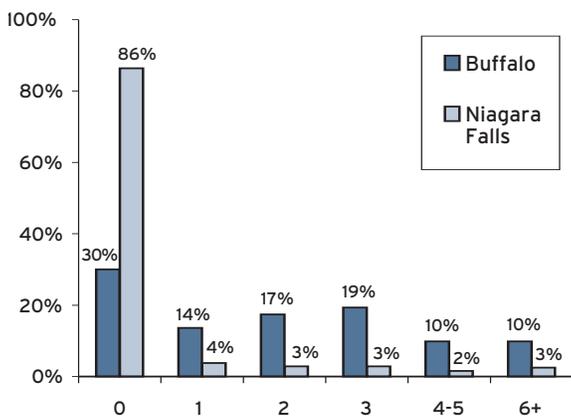
⁹ As the outlying regions of Western New York fall outside a 50-mile radius of the Buffalo Niagara region, it follows that the percentage of visitors from Western New York during the summer was greater than those from within a 50-mile radius. That is, "tourists," as defined for purposes of this report, could reside within Western New York.

planned to stay at least one night). About 20% of all visitors indicated plans to stay four or more nights in the Buffalo area; 5% of all visitors had plans to stay as many nights in the Niagara Falls area.

Overall, the average length of stay in the Buffalo area was about 2.2 nights, compared to .4 nights in the Niagara Falls area.¹¹

The relatively short lengths of stay are not particularly surprising given that One Summerlong Sensation promotions targeted “drive markets,” or areas close enough to make a day-long trip worthwhile. On the other hand, considering that tourists comprise about one-third of the region’s total visitors, increasing overnight stays in the region could dramatically improve the economic impact of tourism in the region. Indeed, tourists spent about five times more than local visitors on event- and visit-related goods and services (\$135 vs. \$26 per person – see Table 5).

Figure 4
Length of Stay (# of Nights)



¹⁰ Survey respondents were asked to report how many nights, if any, they planned to stay in the “Buffalo area” and the “Niagara Falls area.” It was determined that using specific city names rather than the more broadly defined Buffalo Niagara region would be more familiar to tourists, as well as more useful in analyzing trends in overnight stays.

¹¹ This average was conservatively calculated by assuming that those respondents who reported staying seven or more nights actually stayed only seven nights.

Table 10
Accommodations

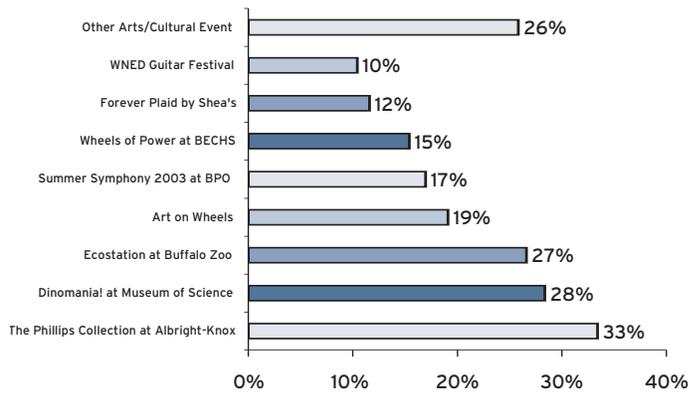
	Motels/ Hotels/ B&B	Campground/ RV	Friends/ Relatives
% Staying at least one night	54%	2%	24%
Average Length of Stay (# Nights)	3	2	4

ii. Type of Accommodations

Overnight visitors to the region were asked to indicate how many nights they planned to stay in each of the following accommodations: motel, hotel or bed and breakfast; campground or recreational vehicle (RV); and friends or relatives. A majority of the respondents - 54% - planned to lodge at least one night in a motel, hotel or bed and breakfast. Nearly one-quarter - 24% - reported plans to spend at least one night with friends or relatives. Only 2% said they would find accommodations in a campground or RV. On average, tourists staying at a hotel, motel or bed and breakfast stayed three nights, those staying with friends and relatives four nights, and those in a campground or RV two nights. (It cannot be assumed that these numbers reflect the total length of stay, as tourists could stay in more than one accommodation).

Interestingly, 10% of those staying with friends and relatives were also likely to spend at least one night in the region at a hotel, motel or bed and breakfast. It follows then that friends and relatives of regional residents are an important component of the region’s tourism market, staying longer in the region than other tourists and spending money not only on goods and services but also on overnight accommodations.

Figure 5
“Which of the following One Summerlong Sensation events/exhibits have you attended or do you plan to attend?”



iii. Trip Activities

Survey respondents were asked which of eight cultural, arts and tourism venues and events they had already attended or planned to attend sometime during summer 2003 (Figure 5). Also, visitors were asked to indicate if there were “any other Buffalo Niagara area arts/ cultural events” they planned to visit during the summer.

A considerable number of visitors – 49% – had already visited or planned to include on their trip itinerary at least two of the venues and events listed in the survey. The Albright-Knox Art Gallery’s Masterworks from The Phillips Collection appeared to be the most popular among the survey respondents, with exactly one-third reporting that they saw or planned to see the exhibit. Dinomania! at the Buffalo Museum of Science and the EcoStation at the Buffalo Zoo were also popular, with more than one-quarter of respondents (28% and 27%, respectively) indicating that they visited or intended to visit these attractions.

Art on Wheels (19%), the Buffalo Philharmonic’s Summer Symphony 2003 (17%) and the Buffalo and

Erie County Historical Society’s Wheels of Power exhibit (15%) also drew a considerable portion of visitors. Approximately 12% of all respondents attended or planned to attend Forever Plaid; 10% said they had attended or expected to attend WNED’s Buffalo Niagara Guitar Festival 2003. About one quarter of all respondents said that they visited or had plans to visit at least one other arts/ cultural event in the region.

It is important to note several factors contributing to some of the differences in response rates. First, not all of the attractions and events lasted for the duration of the summer (see Section III for listing of event and exhibit schedules). The Guitar Festival, for example, took place over the course of only one week in June, which explains why so few indicated they had plans to attend that venue. Indeed, the Guitar Festival was a huge success, drawing 127,880 visitors in one week, second only to the Buffalo Zoo, which saw 196,793 visitors between Memorial Day and Labor Day. Also, Forever Plaid ran only for the month of June, while other summer programming at Shea’s Performing Arts Center, including historic tours of its facility, continued throughout the summer.

Second, the number of surveys conducted at each venue and event varied based upon the sample sizes needed for statistically significant results (Addendum C), which likely skewed the results in favor of those venues with the most surveys conducted onsite. Indeed, it is not a surprise that more visitors reported they had attended or planned to view the Phillips Collection at the Albright-Knox Art Gallery, where about 100 surveys were conducted, while fewer reported attending the Historical Society, where only 65 surveys were conducted.

iv. Group Size

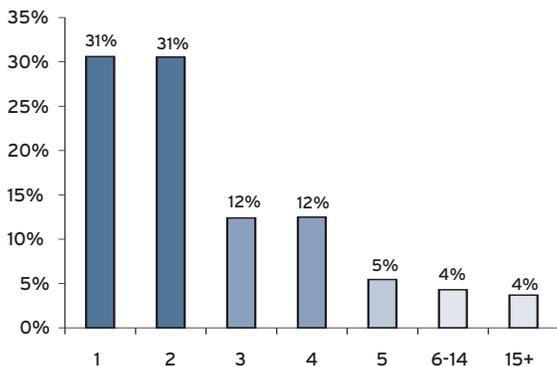
A majority of visitors to the selected venues and events – approximately 62% – traveled to or attended the event alone (31%) or with just one other person (31%) (Figure 6). The remainder attended the venues and events in groups of three or more persons, with small groups of three or four being more common than parties of five or more.

d. Visitor Experiences

Visitors reported impressive levels of satisfaction with the events they attended (Figure 7). Indeed, a majority of respondents – 59% – rated their experience at the event or venue at which they were surveyed as “excellent” (or a rating of 5 on a scale of 1 (“poor”) to 5 (“excellent”). And one in five – or 20% – said their satisfaction with the event fell just short of excellent, assigning a rating of 4. Only 1% of visitors said their satisfaction was poor, assigning a rating of either 1 or 2. Roughly 13% of all survey respondents said the question did not apply, while 1% provided no answer at all to this question.

Figure 6

Visitor Group Size

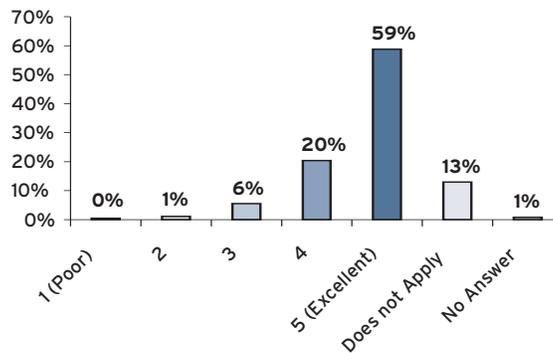


Tourists were additionally asked to rate their overall experience in the Buffalo Niagara region on a scale of 1 to 5 (1 being “poor” and 5 being “excellent”). These visitors reported exceptionally high levels of satisfaction with their experience in Buffalo Niagara (Figure 8). Overall, 54% of tourists indicated their overall experience in Buffalo Niagara was “excellent.” About one in three (30%) assigned their experience in the region a rating of 4. Not one visitor defined their stay in the region as “poor,” although about 1% said their experience was worthy of a rating of only 2.

When asked to explain either their positive or

Figure 7

“How would you rate your overall satisfaction with the event?”



negative evaluations of the region, many tourists referenced the region’s beauty, waterfront location, the natural resource of Niagara Falls, and the abundance of things to experience, such as museums, culture, architecture, history and malls. The region’s amiable residents and small town feel were also positively cited. Some also mentioned that the area was easy to get around and an inexpensive place to stay.

On the other hand, survey respondents also pointed to some of the region’s shortfalls. Among the factors contributing to a less-than-excellent experience were the region’s political situation, weather, lack of signage, poor transportation and an overabundance of construction projects.

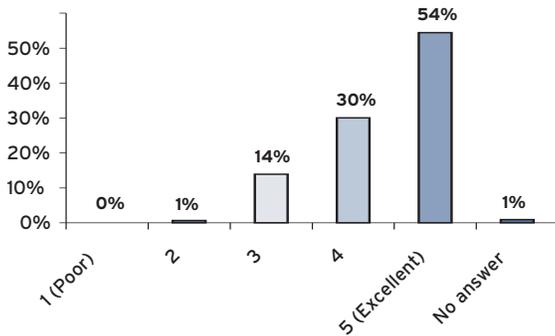
Despite these shortcomings, 99% of all out-of-towners indicated that they would indeed return to Buffalo Niagara in the future.

e. Efficacy of Marketing Campaign

One Summerlong Sensation included one of the region’s most comprehensive and collaborative arts and cultural marketing campaigns. In an effort to evaluate its effectiveness visitors were asked if they were familiar with the initiative (Figure 9), as well as

how they originally heard about the event at which they were surveyed (Figure 10). Considerably few respondents – 22% – indicated awareness of the initiative, although residents of the region were more often aware of the initiative than tourists (29% compared to 8%). Of the 22% of all respondents who said they were aware of One Summerlong Sensation,

Figure 8
 “How would you rate your overall experience in the Buffalo Niagara region?”



90% reported hearing about it before they attended the event at which they were attending. It is important to note, however, that about 41% of all survey respondents (excluding those surveyed at the hotel) learned about the event through advertising (newspaper, radio or online), which could include both One Summerlong Sensation promotional material as well as event- or venue-specific advertising. Not surprisingly, tourists were more likely than residents to hear about an event or venue through advertising.

A significant portion of survey respondents – about 30% – learned of the event or venue by word of mouth. Interestingly, tourists were more likely than residents to learn about a venue or event by word of mouth, which perhaps suggests residents play a role in promoting to their friends and relatives the various things to see and do in the region. Roughly

Figure 9
 “Are you aware of Summerlong Sensation?”

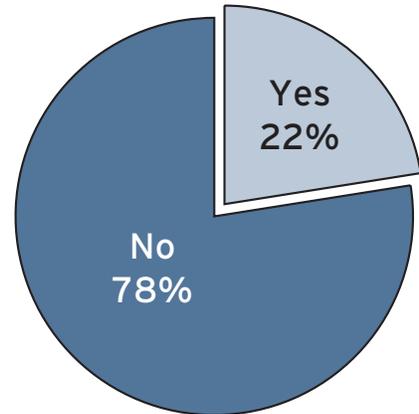
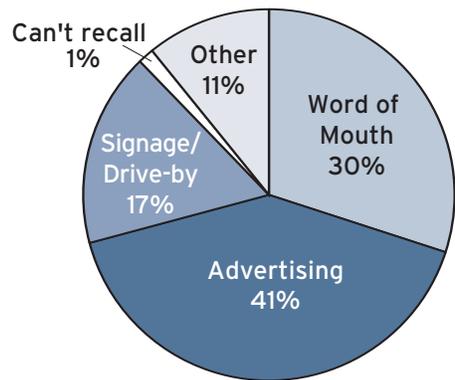


Figure 10
 “How did you originally hear about the event?”



17% of all visitors learned of the attractions by noticing signage in the area or driving by the attraction, although residents were more likely than tourists to obtain information in this way.

VII. QUALITATIVE IMPACT FINDINGS

While an economic impact analysis of One Summerlong Sensation reveals the initiative's quantitative returns to the region, it does not represent the many intangible benefits accrued to Buffalo Niagara as a result of the effort. The promotional campaign for One Summerlong Sensation resulted in widespread media coverage of the region's arts, cultural, and tourism offerings. Hundreds of newspaper articles across the U.S. and Canada, reaching a potential audience of approximately 20 million people, touted Buffalo Niagara's diverse tourist attractions – especially those in arts, culture and heritage – and reinforced a growing national and international notion that Buffalo Niagara is a premier tourism destination.

The BNCVB estimates that the dollar value of the local and national media coverage at more than \$2.7 million, thus leveraging more than \$10 for every dollar spent on marketing and promotion. Of course, by spreading to the word that Buffalo Niagara is a place worth discovering, as shown by the news quotes below, One Summerlong Sensation's public relations campaign will have returns for years to come.

"Buffalo is a vast outdoor museum, displaying the work of many of the greatest architects of the mid-19th century to the mid-20th century. The homes and public buildings are often breathtaking and always interesting...The architectural treasures of Buffalo are riveting. They must be seen."

"Buffalo Almighty," *Atlanta Journal-Constitution*, June 1, 2003.

"So, it turns out that Buffalo's got more than piles of snow and spicy chicken wings. It also has character and spunk, plus four [Frank Lloyd Wright] houses and a park system designed by Frederick Law Olmsted..."

"Shuffle No More. Buffalo – yes, Buffalo—is now walking proud as a hip center of arts and performances. Plus it's a cheap flight," *Washington Post*, July 9, 2003.

"Buffalo's arts community is getting top billing this summer...The cultural life has been a well-kept secret in this lakeside city for years. A new pooling of resources and vast cross-marketing is aimed at

nudging that cat out of the bag."
***Associated Press*, July 12, 2003.**

One Summerlong Sensation also catalyzed new levels of collaboration among Erie and Niagara Counties' arts, cultural, tourism organizations and business and philanthropic communities. Building on an already impressive legacy of working together – from the Summer of Monet to Doors Open Niagara to the Pan American Centennial Celebration – One Summerlong Sensation solidified these creative and professional relationships. Indeed, collaboration has become somewhat of a common practice in Buffalo Niagara. Almost every organization completing the Organizational Survey listed three joint programming or promotional endeavors (in addition to One Summerlong Sensation) undertaken during summer 2003; many listed more than three. Such collaborations reap countless long-term benefits for the region, improving the health of the region's institutions, expanding opportunities for tourism and regional development and enhancing Buffalo Niagara's quality of life.

VIII. SUMMARY AND CONCLUSIONS

In its economic impact analysis of eight major cultural institutions and a representative sample of other cultural tourism events and venues in Buffalo Niagara during summer 2003, this report clearly demonstrates the scope of rewards – both quantitative and qualitative – drawn to the region as a result of Buffalo Niagara’s cultural, art, heritage and tourism assets. One Summerlong Sensation, a consortium of tourism-related events and venues in the bi-county region during summer 2003, attempted to leverage the appeal of these resources by packaging and promoting them together as an extraordinary, summerlong visitor experience.

Surely the summer of 2003 could have offered a more propitious environment for tourism. With the SARS outbreak in Toronto, a sluggish national and regional economy, war and heightened national security, it is indeed no surprise that visitor traffic in the region did not meet expectations. Yet the region saw many benefits, both in terms of dollars and intangible returns, including an improved national and international image as a visitor destination and increased collaboration. In summary:

- 701,793 visitors attended the selected events and venues during summer 2003;
- About one-third of visitors during the summer were tourists (from outside a 50-mile radius of the region or Canada);
- Attendance during summer 2003 was 8% less than expected but 24% higher than typical, according to reporting organizations;
- Visitor spending produced a \$69.5 economic impact; organizational spending produced an \$11.2 economic impact. Total economic impacts were \$75 million. (As visitor and organizational spending overlap, adding visitor and organizational economic impacts would overstate total economic impacts);
- Spending by participating organizations and their visitors supported 1,435 jobs in Erie and Niagara Counties;
- Visitors spent the most on entertainment - museum tickets, admission fees, tours - followed by food and dining, accommodations, shopping, local transportation and groceries;
- Spending patterns differed between local visitors and tourists. Tourists spent the most on accommodations; local visitors spent the most on food and entertainment;

- Employee related expenses accounted for the largest share – almost 40% – of organizational expenses related to One Summerlong Sensation;
- Earned revenues – income generated by programs, services and sales – comprised about 75% of all revenues received by this study’s reporting organizations; contributed income (public, corporate and individual grants and contributions) composed about one-quarter of organizational revenues;
- Visitors were most likely to cite newspaper, radio and online advertising (38%) as their source of information about venues and events in the region, followed by word of mouth (28%), and viewing signage or driving by the location of the event or venue (16%);
- The majority – 55% – of One Summerlong Sensation tourists planned to stay here for two nights or fewer. Twenty-three percent reported they were here for the day only;
- About one-half of all visitors attended or had plans to attend two or more One Summerlong Sensation events in the region;
- Nearly 80% of all visitors rated their overall satisfaction with the event they were surveyed at as “excellent” or just short of excellent;
- 84% percent of tourists similarly rated their experience in the region as excellent or just short of excellent.

Such impacts begin to shed light on the potential of tourism and, more specifically, cultural tourism, as a powerful economic engine for Buffalo Niagara that also leverages other important returns, including improving the region’s national and international image, enhancing the regional quality of life, and strengthening Buffalo Niagara’s prized cultural, arts, heritage and tourism institutions.

As a baseline analysis, however, the conclusions that can be drawn from this report are limited. Conducting similar analyses regularly - perhaps on an annual basis - would help the region decipher trends in tourism development and quantitative returns-on-investment. Before this can happen, however, the region needs to seriously address the fragmented and inconsistent data collection efforts within the tourism industry. Indeed, this report provides a glimpse of the potential of comprehensive, region-wide and industry-wide data collection and analysis efforts. It is hoped that this report is a strong beginning to an enduring effort to objectively analyze the current picture of and set measurable goals for the region’s tourism industry.

ADDENDUM A

Visitors Survey- Page 1

JOB #: OSS 505- MAY 2003 - FINAL DRAFT

EVENT #: _____

SCREEN OUT ANYONE WHO HAS PREVIOUSLY TAKEN THIS SURVEY.

Good afternoon. My name is _____, and I'm, from Cornerstone Research. Today we are conducting a short study on your attendance of (event name), and I'd like to ask you a few questions. For your participation, you will be receiving a pen and picture frame magnet as a thank you.

1. How did you originally hear about (name of event)?(CHECK ONE)
 - (1) Word of mouth
 - (2) Advertising (TV, newspaper, radio, website/internet)
 - (3) Signage/drive-by
 - (4) Do not recall
 - (5) Other
 - (6) Does not apply (HOTEL RESPONDENTS ONLY)
- 2a. Are you aware of SUMMERLONG SENSATION?
 - (1) Yes (CONTINUE)
 - (2) No (SKIP TO 3)
- 2b. Had you heard about SUMMERLONG SENSATION: READ ALL, CHECK ONE)
 - (1) Before coming to this event
 - (2) After arriving in this region but before attending this event
 - (3) After arriving at this event
3. How would you rate your overall satisfaction with (name of event) on a scale of 1-5, 1 being poor, and 5 being excellent? (CIRCLE ONE)
1 2 3 4 5 6 = DOES NOT APPLY (HOTEL RESPONDENTS ONLY)
4. Which of the following SUMMERLONG SENSATION events/exhibits have you attended or do you plan to attend this summer? (READ ALL, CIRCLE ALL THAT APPLY)
 - A. THE PHILLIPS COLLECTION AT THE ALBRIGHT-KNOX ARTGALLERY
 - B. DINOMANIA! AT THE BUFFALO MUSEUM OF SCIENCE
 - C. ECOSTATION AT THE BUFFALO ZOO
 - D. WHEELS OF POWER EXHIBIT AT THE BUFFALO AND ERIE COUNTHISTORICAL SOCIETY
 - E. ART ON WHEELS
 - F. BUFFALO NIAGARA GUITAR FESTIVAL
 - G. FOREVER PLAID AT SHEAS PERFORMING ARTS CENTER
 - H. SUMMER SYMPHONY 2003 (BUFFALO PHILHARMONIC ORCHESTRA)
 - J. ANY OTHER BUFFALO NIAGARA AREA ARTS/CULTURAL EVENT
- 5a. Are you attending this event/ Buffalo Niagara Region with a group/party?
 - (1) Yes (CONTINUE)
 - (2) No (SKIP TO 6)
- 5b. How many people are in your group/party? (CIRCLE NUMBER)
2 3 4 5 6 7 8 9 10 11 12 13 14 15+
6. Do you live within a 50 mile radius of this event/ Buffalo Niagara Region? (SHOW MAP IF NECESSARY)
 - (1) Yes (SKIP TO 11a)
 - (2) No (CONTINUE)
- 7a. How many nights are you staying in the Buffalo area? (CIRCLE ONE)
0 1 2 3 4 5 6 7+
- 7b. How many nights are you staying in the Niagara Falls area? (CIRCLE ONE)
0 1 2 3 4 5 6 7+

Visitors Survey- Page 2

8. *Approximately how many nights do you plan to stay in the Buffalo Niagara Region at:(READ ALL)*
- | | | | | | | | | |
|---|---|---|---|---|---|---|---|----|
| A. A MOTEL, HOTEL, BED AND BREAKFAST (CIRCLE ONE) | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7+ |
| B. CAMPGROUND/RV (CIRCLE ONE) | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7+ |
| C. FRIENDS/RELATIVES CIRCLE ONE | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7+ |

- 9a. *How would you rate your overall experience with the Buffalo Niagara Region, on a scale of 1-5, 1 being poor and 5 being excellent? (CIRCLE ONE)* 1 2 3 4 5

9b. *Why do you feel this way?* _____

10. *Would you return to the Buffalo Niagara Region?*
 (1) Yes (2) No

- 11a. (LOCAL RESPONDENTS ONLY) *Please provide an estimate of how much your group/party (in attendance) has spent in the Buffalo Niagara region related to (NAME OF EVENT) in the following categories: (READ ALL)*

- A. FOOD AT RESTAURANTS/SNACK BARS \$ _____
 B. ENTERTAINMENT (MUSEUM TICKETS, TOURS) \$ _____
 C. GAS/PUBLIC TRANSPORTATION \$ _____
 D. SHOPPING (GIFTS, ETC.) \$ _____
 (LOCAL RESPONDENTS SKIP TO 12)

- 11b. (OUT OF TOWN RESPONDENTS ONLY) *Please provide an estimate of how much your group/party (in attendance) has spent in the Buffalo Niagara region within the last 24 hours on the following:(READ ALL)*

- A. FOOD AT RESTAURANTS/SNACK BARS \$ _____
 B. ENTERTAINMENT (MUSEUM TICKETS, TOURS, MOVIES, CASINOS) \$ _____
 C. GAS/PUBLIC TRANSPORTATION/CAR RENTALS \$ _____
 D. SHOPPING (GIFTS, CLOTHING, ETC.) \$ _____
 E. GROCERIES \$ _____
 F. ACCOMMODATIONS (I.E.: HOTEL, MOTELS, CAMPGROUNDS, ETC.) \$ _____
 G. OTHER \$ _____

THE FOLLOWING QUESTIONS ARE FOR CLASSIFICATION PURPOSES ONLY. COULD YOU PLEASE TELL ME:

12. *Your age: (CHECK ONE)*

- (1) Under 18
 (2) 18-34
 (3) 35-54
 (4) 55-74
 (5) 75+
 (6) WND

13. *Your gender: (1) Male (2) Female*

14. *Your zip code:* _____

15. *If you would like to provide your e-mail address, you can be entered into a drawing to win a weekend get-away to a Bills home game: e-mail address:* _____

THANK YOU VERY MUCH FOR YOUR PARTICIPATION IN THIS IMPORTANT SURVEY.

Organizational Survey- Page 1



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One Summerlong Sensation Organizational Survey

1. The following questions ask you to estimate expenses related to One Summerlong Sensation (“OSS”). Please note:

- In the first column (“Total \$ related to OSS prior to summer”), please estimate for each category only those expenses that are *related to any programming that took place during One Summerlong Sensation (Memorial Day to Labor Day 2003)* but were *disbursed before Memorial Day*.
- In the second column (“Total \$ during OSS”), please estimate for each category the *total expenses disbursed during One Summerlong Sensation (Memorial Day to Labor Day 2003)*.
- All expenses listed for categories (a) through (f) should represent **total disbursements**. However, category (g) asks you to estimate how much of those total expenses were **disbursed to businesses/organizations/contractors outside the Buffalo Niagara region** (e.g., payment to insurer with no local offices, purchase of art/materials from non-regional entity, etc.).

	Total \$ related to OSS prior to summer (before Memorial Day)	Total \$ during OSS (Memorial Day to Labor Day)
a. Employee expenses		
Wages and salaries	_____	_____
Pension contributions	_____	_____
Other employee benefits	_____	_____
Payroll taxes	_____	_____
Other	_____	_____
b. Operating expenses		
Accounting/bookkeeping fees	_____	_____
Legal fees	_____	_____
Other professional/ consulting fees	_____	_____
Office/paper supplies	_____	_____
Printing/publication costs	_____	_____
Advertising/promotion	_____	_____
Postage/shipping	_____	_____
Telephone	_____	_____

-CONTINUE-

Organizational Survey- Page 2

Production (including presenting programs and special events)	_____	_____
Travel for conf., conv., mtg.,	_____	_____
Insurance - (e.g. property, liability)	_____	_____
Other	_____	_____
c. Capital expenses	_____	_____
Equipment rental/purchase	_____	_____
Computer networking	_____	_____
Construction	_____	_____
Capital depreciation	_____	_____
Interest	_____	_____
Other	_____	_____
d. Facility expenses	_____	_____
Rent	_____	_____
Building services	_____	_____
Utilities	_____	_____
Property taxes	_____	_____
Other	_____	_____
e. Other (please specify)	_____	_____
_____	_____	_____
_____	_____	_____
f. Taxes/municipal fees	_____	_____
Federal	_____	_____
State Income	_____	_____
State Sales	_____	_____
Local (excluding property)	_____	_____
g. For each column, estimate total expenses disbursed to businesses/organizations/ contractors outside the Buffalo Niagara region.	_____	_____
2. Estimate number of employees with your organization...		
	Between Memorial Day and Labor Day 2002	Between Memorial Day and Labor Day 2003
a. Full-time	_____	_____
b. Part-time	_____	_____
c. Volunteers	_____	_____
3. Annual revenues received for any programming taking place during One Summerlong Sensation (Memorial Day to Labor Day 2003):		
	-CONTINUE-	
a. Earned Income		
i. Ticket sales admissions	_____	_____
ii. Concession sales	_____	_____
iii. Gift shop sales	_____	_____
iv. Sale of art (non gift shop)	_____	_____

Organizational Survey- Page 3

b. Contributed income:

- i. Federal, state, local grants _____
- ii. Foundation and corporate grants _____
- iii. Individual contributions _____
- iv. Fundraising events _____

c. In-kind contributions (e.g., volunteers, donations of equipment, facilities, supplies):

- i. Please describe:

- ii. Estimated value:

4. What was the *total number of visitors* (regardless of geographic origin) to your venue/event(s) during One Summerlong Sensation (Memorial Day to Labor Day 2003)? _____
5. What was the *estimated attendance* for this period (Memorial Day to Labor Day 2003)? _____
6. What is the *typical attendance* for this period (Memorial Day to Labor Day)? _____
7. If your organization collects zip codes or other information to identify geographical origin of your patrons....
- a. During a typical summer (Memorial Day to Labor Day), what percentage of your venue/event's total attendance are tourists (those originating from outside a 50-mile radius of the Buffalo Niagara region or from anywhere in Canada)? _____
 - b. How many *visitors from outside the region* actually attended your venue/event during *-CONTINUE-* on (Memorial Day to Labor Day 2003)? _____
8. What packaging and/or joint programming campaigns/partnerships (other than the One Summerlong Sensation joint marketing campaign) did your organization pursue during the 2003 summer season? This could include partnerships with bus tours, hotels, other cultural/arts organizations, etc. Please list and briefly describe:
- 1. _____

 - 2. _____

Organizational Survey- Page 4

3. _____

4. _____

5. _____

-END-

**PLEASE COMPLETE THIS SURVEY
AND RETURN TO THE INSTITUTE
BY SEPTEMBER 30, 2003**

ADDENDUM C

Visitors Survey Schedule/Sample Sizes



ONE SUMMERLONG SENSATION VISITORS SURVEY Sample Sizes and Survey Schedule

1. THEODORE ROOSEVELT INAUGURAL NATIONAL HISTORIC SITE Attendance: 5,500 Recommended sample size: 30 Survey Date(s): June 14	10. WNED BUFFALO NIAGARA GUITAR FESTIVAL Attendance: 75,000 Recommended sample size: 75 Survey Date(s): June 15 and June 18
2. GRAYCLIFF Attendance: 4,200 (May-Sept.) Recommended sample size: 25 Survey Date(s): June 1	11. BUFFALO & ERIE COUNTY HISTORICAL SOCIETY Attendance: 35,000 Recommended sample size: 65 Survey Date(s): August 2 and August 3
3. OLD FORT NIAGARA Attendance: 54,000 (June-July) Recommended sample size: 75 Survey Date(s): June 7 and June 8	12. BUFFALO ZOO Attendance: 150,000 Recommended sample size: 75 Survey Date(s): July 26 and July 27
4. BUFFALO & ERIE COUNTY NAVAL & MILITARY PARK Attendance: 22,000 Recommended sample size: 50 Survey Date(s): July 19	13. SHEA'S PERFORMING ARTS CENTER Attendance: 9,200 Recommended sample size: 65 Survey Date(s): June 21
5. LOCKPORT LOCKS & ERIE CANAL CRUISES Attendance: 42,500 Recommended sample size: 65 Survey Date(s): June 28 and June 29	14. BUFFALO PHILHARMONIC ORCHESTRA Attendance: 43,800 Recommended sample size: 50 Survey Date(s): July 19
6. MOTHERLAND CONNEXIONS Attendance: 3,000 Recommended sample size: 25 Survey Date(s): August 8	15. ALBRIGHT-KNOX ART GALLERY Attendance: 100,000 Recommended sample size: 100 Survey Date(s): August 9 and August 10
7. ROYCROFT Attendance: 400,000 Recommended sample size: 65 Survey Date(s): June 28 and June 29	16. ART ON WHEELS Attendance: 100,000 Recommended sample size: 85 Survey Date(s): Conducted at various sites throughout June, July and August.
8. FOUR POINTS BT SHERATON HOTEL Attendance: NA Recommended sample size: 75 Survey Date(s): July 20 and July 27, August 10	17. BUFFALO MUSEUM OF SCIENCE Attendance: 75,000 Recommended sample size: 75 Survey Date(s): August 16 and August 17
9. WE CARE GROUP (Art on Wheels' Buffalo bus tour) Attendance: NA Recommended sample size: 25 Survey Date(s): August 3	TOTAL SAMPLE SIZE = 1,015 TOTAL SURVEYS ACTUALLY CONDUCTED = 1,026

ADDENDUM D

GLOSSARY

Direct impact—the economic activity associated with the direct spending of visitors and organizations within the region

Employment—reflects the number of full-time and part-time jobs

Indirect business taxes—taxes paid to businesses during the course of regular business operations. Comprised primarily of sales taxes, and to a smaller extent, excise taxes

Indirect impact—the economic activity generated by the re-spending of dollars by those businesses that directly or indirectly support those that are directly impacted

Induced impact—the economic activity generated by household spending for those households employed in the industries that are directly and indirectly impacted

Labor income—comprised of employee compensation (wages and salaries as well as the value of non-cash benefits such as life, health and dental insurance and pension payments) and proprietary income to the self-employed

Local expenditures—purchases made at businesses, organizations or other entities located within the region

Other property-type income—dividends, rents, royalties, etc. that are paid from corporate profits

Output—a measure of economic impact reflecting the dollar value of spending taking place within the region

Random sample—a sample drawn from a population (e.g. all arts and cultural visitors in Buffalo Niagara) in such a way that all population items have an equal chance of being selected

Region—the geographic area in which impacts are studied; encompasses Erie and Niagara Counties (the Buffalo Niagara region), for the purpose of this report

Secondary impact—the sum of indirect and induced impacts

Statistically significant—where observed, differences between random samples (e.g. tourists and residents) can be assumed to exist in the populations from which they are drawn since the probability of seeing these differences by chance alone is statistically low

Total impact—the sum of direct, indirect and induced impacts

Tourist—a visitor from the U.S. residing outside a 50-mile radius of the Buffalo Niagara region or from Canada

Value added—a measure of economic impact that includes labor income, other property-type income and indirect business taxes

ADDENDUM E

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