

# Audience Survey and Attendee Economic Impact Delray Beach Center for the Arts FY 15

Cultural Council of Palm Beach County

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# About this Study

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This research project was a joint effort between Surale Phillips, President, Decision Support Partners, Inc. and Americans for the Arts. Funded by bed tax revenues, the Cultural Tourism Development Fund provides grants to cultural organizations with annual operating budgets over \$1.75M (Category B). These grants support tourist development efforts of these major institutions. Administered through the Cultural Council of Palm Beach County under contract with the Tourist Development Council and Board of County Commissioners, this biennial grant program requires funded organizations to collect standardized spending and marketing data from visitors and audiences over the duration of the grant period. The intent of this report is to report the impact of the Fund relative to its mission of enhancing Palm Beach County as a cultural destination, the return on that investment, and to help inform future cultural tourist marketing efforts.

Members of a selection committee that included leaders of several Category B organizations, members of the Cultural Council Board of Directors, and members of the Tourism Development Council selected Decision Support Partners, Inc. through a competitive process to refresh the process of this reporting. The consultant held meetings with the committee and representatives from Category B organizations to design a survey and process for data collection. The survey was later refined with Americans for the Arts to be consistent with other local and national efforts in the area of arts and economic impact following the rigorous methodology used by the national agency. The consultant provided an Intercept Survey Guidebook customized for this project and onsite technical assistance to each organization upon request.

## Methodology

The survey contained a standardized set of questions that were administered by volunteers and/or paid contractors to visitors through paper intercept surveys, online surveys at kiosks, and on digital tablets. As possible, visitors were selected randomly, assuming that organizations followed instructions provided in the guidebook.

Survey quotas were set based on visitor attendance size and the number of opportunities for surveying (e.g. number of performances in the season). Each organization was issued a survey quota of 600, with the exception of two organizations which were set at a quota of 400 due to limited performance opportunities. The quotas were set to produce results within a margin of error of four percent at a 95 percent confidence level. Economic impact analysis was conducted by Americans for the Arts.

Audience-intercept surveying, a common and accepted research method, was conducted by all Category B grantees to measure event-related spending by out-of-county visitors, full-time county residents, and seasonal county residents. Visitors were asked to complete a survey while attending an event or making a visit to a destination venue. In total, 11,346 valid surveys were collected from randomly selected respondents. The randomly selected respondents provided itemized expenditure data on attendance-related activities such as meals, souvenirs, transportation, and lodging. Out-of-town visitors also provided expenditure data related to their visit to Palm Beach County as well as primary reason for visitation. Demographics and marketing data were also collected.

Data were collected between October 1, 2014 and September 30, 2015 (to guard against seasonal spikes) as well as at a broad range of paid and free events (a night at the opera will typically yield more spending than a weekend free art event, for example). The survey respondents provided information about the entire party with whom they were attending the event. With an overall average travel party size of 3.3 people, these data actually represent the spending patterns of more than 37,441 attendees, significantly increasing the reliability of the data.

## Direct and Indirect Economic Impact:

### How an Arts Attendee's Dollar is Re-spent in the Economy

To derive the most reliable economic impact data, input-output analysis is used to measure the impact of audience expenditures. This is a highly regarded type of economic analysis that has been the basis for two Nobel Prizes. The models are systems of mathematical equations that combine statistical methods and economic theory in an area of study called econometrics. They trace how many times a dollar is re-spent within the local economy before it leaks out, and it quantifies the economic impact of each round of spending. This form of economic analysis is well suited for this study because it can be customized specifically to Palm Beach County. To complete the analysis for Palm Beach County, project economists customized an input-output model based on the local dollar flow between 533 finely detailed industries within the economy of Palm Beach County. This was accomplished by using detailed data on employment, incomes, and government revenues provided by the U.S. Department of Commerce (County Business Patterns, the Regional Economic Information System, and the Survey of State and Local Finance), local tax data (sales taxes, property taxes, and miscellaneous local option taxes), as well as the survey data from the responding nonprofit arts and culture organizations and their audiences.

How can a dollar be re-spent? Consider the following example:

A husband and wife attend a performance at a local theater. As part of their experience they pay \$125 for a meal at a nearby theater before the show. The restaurant then uses a portion of the \$125 to pay the server; the server then re-spends some of the money at the grocery store; the grocery store uses some of the money to pay its cashier; the cashier spends some on rent; and so on...Thus, the initial expenditure by arts attendees was followed by four additional rounds of local spending (by the restaurant, the server, the grocery store, and the cashier).

The economic impact of the couple's initial \$125 expenditure is the direct economic impact.

The economic impacts of all subsequent rounds of local spending are the indirect and induced impacts.

Eventually, the \$125 dollars will “leak out” of the local economy (i.e., be spent outside Palm Beach County) and cease to have a local economic impact. In this example, if the couple purchased their meal from a non-local restaurant there would be no local economic impact. Since the restaurant is located in Palm Beach County, the dollars remain within the local economy and create at least one more round of regional spending by the restaurant.

The total impact is the sum of the direct impact plus all indirect and induced impacts. This report provides the total impact. A dollar “ripples” very differently through each community, which is why a customized input-output model was created for Palm Beach County.

## Participating Organizations

Below is a listing of the Category B organizations that provided data for this study. “Valid” surveys represent complete surveys, meaning that all mandatory questions were answered and extreme outliers were removed. Estimated attendance is as reported by participating grantees for FY 15.

	Organization	Valid Surveys Collected	Estimated 2014-2015 Attendance
1	Armory Art Center, Inc.	598	34,331
2	Boca Raton Historical Society	471	100,334
3	Boca Raton Museum of Art	755	131,254
4	Delray Beach Center for the Arts	421	582,680
5	FAU Foundation, Inc. Dorothy Schmidt College of Arts & Letters	597	46,137
6	Henry Morrison Flagler Museum	487	77,777
7	The Raymond J. Kravis Center for the Performing Arts, Inc.	616	441,096
8	Loggerhead Marinelife Center, Inc.	598	276,910
9	Maltz Jupiter Theatre, Inc.	617	74,518
10	Miami City Ballet	506	98,935
11	The Morikami, Inc.	742	196,978
12	Norton Museum of Art	609	95,069
13	Palm Beach Dramaworks, Inc.	541	42,021
14	Palm Beach Opera	489	26,461
15	Palm Beach Photographic Centre, Inc.	472	73,250
16	Palm Beach State College	643	40,596
17	South Florida Science Center	1,011	210,593
18	SunFest of Palm Beach County, Inc.	606	185,086
19	The Zoological Society of the Palm Beaches, Inc.	573	323,166
	Totals	11,352	3,057,192

# Summary of Findings for Delray Beach Center for the Arts

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- The sample of 421 surveys was comprised of 73.6% Palm Beach County residents and 26.4% non-residents.<sup>1</sup> Of Palm Beach County resident attendees, 72.3% were full-time residents and 27.7% were part-time residents. Of non-resident attendees, 39.6% may be described as primary cultural tourists and 60.4% may be described as secondary cultural tourists.<sup>2</sup>
- In summary, \$151.16 in per attendee spending at the Delray Beach Center for the Arts generated an estimated \$88,083,237 in event-related spending in Palm Beach County. Thirty two percent (32.0%) - or \$28,170,799 of this spending - was generated by visitors of Palm Beach County (non-resident attendees). Resident attendees generated \$59,912,438 in event-related spending.
- The economic activity of the Delray Beach Center for the Arts generated 2,222 FTE (full-time equivalent) jobs, \$42,783,000 in resident household income, \$4,188,000 in local government revenue, and \$4,912,000 in state government revenue.
- Culture-related spending generated by the Delray Beach Center for the Arts totaled \$101,918,257, which included \$13,835,020 in visitor trip spending in Palm Beach County directly attributable to primary tourist attendance in addition to event-related spending.
- Just over half (51.4%) of all non-resident attendees reported that they would have traveled outside of Palm Beach County to attend a similar event if the cultural activity at the Delray Beach Center for the Arts had not been available.
- Paid lodging was utilized by 25.0% of Delray Beach Center for the Arts primary cultural tourists. In total, non-resident attendees generated 110,873 paid lodging room nights and \$18,487,151 in lodging expenditures, \$7,230,114 of which can be attributed directly to the attendance of primary cultural tourists.

The charts below illustrate the survey results and economic impact of the Delray Beach Center for the Arts based on data submitted for the larger study.

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<sup>1</sup> For the purposes of this study, residents are cultural attendees who live within Palm Beach County; non-residents live outside that area.

<sup>2</sup> A primary cultural tourist is anyone who reported that the primary reason for their visit to Palm Beach County was specifically to attend the event where they completed the survey, or anyone who reported that the primary reason for their visit to Palm Beach County was specifically to experience Palm Beach arts/culture, or anyone else who reported that the primary reason for their visit was something else, but who also reported that Palm Beach County's arts and cultural opportunities were a "significant" factor in the decision to make their trip. A secondary cultural tourist is all other non-residents of Palm Beach County, including those that reported that Palm Beach County's arts and cultural opportunities were a "contributing" factor in the decision to make their trip.

# Delray Beach Center for the Arts Results

Survey results are provided in the aggregate, as well in a few key subgroups. Results are compared between the following subgroups:

- All county residents and non-residents
- Full-time and part-time Palm Beach County residents
- Primary cultural tourists and secondary cultural tourists

Please refer to the attached survey for actual survey questions.

**Table 1. Survey Sample**

Survey Sample	Survey Sample	Percentage of Sample	Percentage of Subgroup
All Attendees	421		
Full-Time Residents	224	53.2%	72.3%
Part-Time Residents	86	20.4%	27.7%
All Residents	310	73.6%	
Primary Cultural Tourists (Non-Residents)	44	10.5%	39.6%
Secondary Cultural Tourists (Non-Residents)	67	15.9%	60.4%
All Non-Residents	111	26.4%	

**Table 2. First-Time Attendance**

First-Time Attendance	Percentage First-Time Attending
All Attendees	30.8%
Full-Time Residents	23.8%
Part-Time Residents	20.0%
All Residents	22.7%
Primary Cultural Tourists (Non-Residents)	47.7%
Secondary Cultural Tourists (Non-Residents)	56.7%
All Non-Residents	53.2%

Table 3. Estimated Attendance and Spending

Attendance and Event-Related Spending	% of Attendees	Estimated Attendance	Average PP Event-Related Expenditure	Estimated Event-Related Spending*
All Attendees	100%	582,680	\$151.16	\$ 88,083,237
Full-Time Residents	53.2%	309,986	\$ 148.64	\$ 46,076,319
Part-Time Residents	20.4%	118,867	\$ 116.40	\$ 13,836,119
All Residents		428,853	\$ 139.69	\$ 59,912,438
Primary Cultural Tourists (Non-Residents)	10.5%	61,181	\$ 164.86	\$ 10,086,300
Secondary Cultural Tourists (Non-Residents)	15.9%	92,646	\$ 195.20	\$ 18,084,499
All Non-Residents		153,827	\$ 183.17	\$ 28,170,799

\* Total estimated spending per attendee is computed by each subgroup based on percentage of estimated attendance. Therefore, estimated spending reported may vary somewhat from multiplying the average per person expenditure for attendees by total estimated attendance.

Table 4. Travel Party Size and Makeup

Travel Party Size and Makeup	Average Number in Party	Adults	Children
All Attendees	3.4	3.1	0.3
Full-Time Residents	3.0	2.9	0.1
Part-Time Residents	3.9	2.8	1.0
All Residents	3.2	2.9	0.3
Primary Cultural Tourists (Non-Residents)	3.5	3.3	0.2
Secondary Cultural Tourists (Non-Residents)	4.0	4.0	0.1
All Non-Residents	3.8	3.7	0.1

Table 5. Travel Party Size by Overnight vs. Daytrip (Aggregate Study Only)\*

Overnight vs. Daytrip	Average Number in Party
<b>Non-Residents</b>	<b>3.5</b>
Primary Overnigheters	2.7
Secondary Overnigheters	3.4
Primary Day Trippers	3.7
Secondary Day Trippers	3.8

\* This data was not computed for participating organizations, but is provided here in the aggregate for reference.



Table 6. Event-Related Spending Details

Event-Related Spending Details	Admission	Meals On-Site	Meals Off-Site	Souvenirs	Clothing	Local Transportation	Child Care	Overnight Accommodations	Misc.
All Attendees	\$55.39	\$9.40	\$33.51	\$3.37	\$5.15	\$20.45	\$0.53	\$15.18	\$8.17
Full-Time Residents	\$58.90	\$8.03	\$41.12	\$3.13	\$6.12	\$26.17	\$0.13	\$2.10	\$2.94
Part-Time Residents	\$28.24	\$8.44	\$19.69	\$2.83	\$3.51	\$3.30	\$1.16	\$25.21	\$24.03
All Residents	\$50.39	\$8.15	\$35.18	\$3.04	\$5.39	\$19.82	\$0.42	\$8.51	\$8.79
Primary Cultural Tourists (Non-Residents)	\$34.41	\$6.92	\$36.21	\$4.69	\$6.06	\$14.65	\$1.77	\$47.89	\$12.27
Secondary Cultural Tourists (Non-Residents)	\$92.29	\$16.83	\$24.06	\$4.05	\$3.44	\$27.14	\$0.22	\$24.56	\$2.61
All Non-Residents	\$69.34	\$12.90	\$28.88	\$4.30	\$4.48	\$22.19	\$0.84	\$33.80	\$6.44

Table 7. Additional Culture-Spending by Primary Cultural Tourists

Name of Category B Organization	Total FY Attendance	ADDITIONAL CULTURE-SPENDING BY PRIMARY TOURISTS -- DURING THEIR ENTIRE VISIT TO PALM BEACH COUNTY									TOTAL CULTURE-RELATED SPENDING BY ATTENDEES
		Estimated Attendance	Total Number of Cultural Organizations	Unique Attendance	Party Size	Number of Travel Parties	Average Trip Expenditure	Total Trip Spending	Event-Related Spending	Total Additional Spending	
Armory Art Center, Inc.	34,331	2,575	1.7	1,515	4.7	322	\$3,392.86	\$1,093,444	\$914,563	\$178,881	\$3,791,205
Boca Raton Historical Society	100,334	18,762	2.3	8,157	2.0	4,079	\$1,572.81	\$6,415,013	\$1,911,097	\$4,503,916	\$13,418,135
Boca Raton Museum of Art, Inc.	131,254	26,382	1.4	18,844	5.5	3,426	\$1,154.52	\$3,955,655	\$3,659,975	\$295,680	\$11,787,487
Delray Beach Center for the Arts	582,680	61,181	3.1	19,736	3.5	5,639	\$4,242.27	\$23,921,320	\$10,086,300	\$13,835,020	\$101,918,257
FAU Foundation, Inc. Dorothy Schmidt College of Arts & Letters	46,137	14,072	1.4	10,051	2.4	4,188	\$1,761.59	\$7,377,707	\$885,973	\$6,491,734	\$9,033,482
Henry Morrison Flagler Museum	77,777	21,233	0.5	42,466	2.9	14,643	\$2,311.11	\$33,842,620	\$1,936,025	\$31,906,595	\$40,177,531
The Raymond J. Kravis Center for the Performing Arts, Inc.	441,096	7,940	0.2	39,700	3.0	13,233	\$1,822.57	\$24,118,676	\$593,674	\$23,525,002	\$56,519,511
Loggerhead Marinelife Center, Inc.	276,910	42,090	1.7	24,759	3.6	6,877	\$1,960.43	\$13,482,761	\$3,865,125	\$9,617,636	\$47,962,892
Maltz Jupiter Theater, Inc.	74,518	5,887	1.2	4,906	3.1	1,583	\$2,333.33	\$3,692,557	\$437,816	\$3,254,741	\$11,199,239
Miami City Ballet	98,935	11,378	1.2	9,482	2.5	3,793	\$1,514.29	\$5,743,197	\$2,481,428	\$3,261,769	\$18,667,508
The Morikami, Inc.	196,978	73,276	0.2	366,380	4.6	79,648	\$972.67	\$77,471,051	\$4,016,990	\$73,454,061	\$86,301,336
Norton Museum of Art	95,069	9,507	1.5	6,338	2.2	2,881	\$1,260.71	\$3,631,991	\$458,237	\$3,173,754	\$8,685,895
Palm Beach Dramaworks, Inc.	42,021	2,731	0.2	13,655	2.4	5,690	\$1,000.00	\$5,689,583	\$189,996	\$5,499,587	\$10,107,064
Palm Beach Opera, Inc.	26,461	3,784	3.5	1,081	3.2	338	\$2,327.12	\$786,234	\$573,692	\$212,542	\$3,354,993
Palm Beach Photographic Centre, Inc.	73,250	16,921	1.3	13,016	1.6	8,135	\$3,143.03	\$25,568,851	\$24,805,340	\$763,511	\$32,431,686
Palm Beach State College	40,596	8,525	0.6	14,208	3.5	4,060	\$1,829.58	\$7,427,224	\$310,481	\$7,116,743	\$8,848,659
South Florida Science Museum, Inc.	210,593	48,647	1.2	40,539	3.8	10,668	\$444.44	\$4,741,376	\$2,495,591	\$2,245,785	\$9,661,427
SunFest of Palm Beach County, Inc.	185,086	53,120	0.3	177,067	3.1	57,118	\$716.94	\$40,950,379	\$5,906,944	\$35,043,435	\$54,694,536
The Zoological Society of the Palm Beaches, Inc.	323,166	61,725	3.2	19,289	4.4	4,384	\$900.00	\$3,945,490	\$1,849,281	\$2,096,209	\$9,734,485
<b>TOTAL</b>	<b>3,057,192</b>	<b>489,736</b>						<b>\$293,855,270</b>	<b>\$67,378,528</b>	<b>\$226,476,742</b>	<b>\$538,295,329</b>

Table 8. Information Sources

Information Sources	Newspaper	Magazine	Internet	TV	Hotel	Social Media	WOM (Not Social Media)	Other
All Attendees	29.5%	9.7%	16.9%	1.5%	2.2%	8.5%	35.4%	26.6%
Full-Time Residents	31.8%	9.5%	16.8%	1.8%	0.9%	9.5%	39.5%	25.9%
Part-Time Residents	29.4%	9.4%	15.3%	1.2%	1.2%	8.2%	35.3%	23.5%
All Residents	31.1%	9.5%	16.4%	1.6%	1.0%	9.2%	38.4%	25.2%
Primary Cultural Tourists (Non-Residents)	25.6%	4.7%	27.9%	2.3%	4.7%	7.0%	23.3%	27.9%
Secondary Cultural Tourists (Non-Residents)	24.6%	13.8%	12.3%	0.0%	6.2%	6.2%	29.2%	32.3%
All Non-Residents	25.0%	10.2%	18.5%	0.9%	5.6%	6.5%	26.9%	30.6%

Table 9. Attracting New Dollars and Retaining Local Dollars

If event not available, would have traveled someplace other than PBC for experience...	No, would have skipped it	No, would have replaced it in PBC	Yes, would have gone outside of PBC
All Attendees	34.2%	24.2%	41.6%
Full-Time Residents	39.5%	25.2%	35.2%
Part-Time Residents	31.7%	23.2%	45.1%
All Residents	37.3%	24.7%	38.0%
Primary Cultural Tourists (Non-Residents)	23.3%	18.6%	58.1%
Secondary Cultural Tourists (Non-Residents)	27.3%	25.8%	47.0%
All Non-Residents	25.7%	22.9%	51.4%

Table 10. History of Visits to Palm Beach County

History of Visits to Palm Beach County	First Visit to PBC	1-2 Visits	3+ Visits
Primary Cultural Tourists (Non-Residents)	16.7%	9.5%	73.8%
Secondary Cultural Tourists (Non-Residents)	15.9%	17.5%	66.7%
All Non-Residents	16.2%	14.3%	69.5%

Table 11. Mode of Travel

Mode of Travel to Palm Beach County	Car	Bus	Boat	Plane	Train	Other
Primary Cultural Tourists (Non-Residents)	64.3%	7.1%	0.0%	28.6%	4.8%	2.4%
Secondary Cultural Tourists (Non-Residents)	50.0%	14.1%	0.0%	32.8%	6.3%	1.6%
All Non-Residents	55.7%	11.3%	0.0%	31.1%	5.7%	1.9%

Table 12. Decision Making

Made Decision to Visit Cultural Organization	Before Arriving	After Arriving
Primary Cultural Tourists (Non-Residents)	68.2%	31.8%
Secondary Cultural Tourists (Non-Residents)	41.5%	58.5%
All Non-Residents	52.3%	47.7%

Table 13. Availability of Cultural Opportunities

Cultural Opportunity Factored into Decision to Visit	Significant	Contributing	Not a factor
Primary Cultural Tourists (Non-Residents)	100%	0%	0%
Secondary Cultural Tourists (Non-Residents)	0%	65.7%	34.3%
All Non-Residents	39.6%	39.6%	20.7%

Table 14. Primary Reason for Visitor Trip

Primary Reason for Visitor Trip	Specific PBC Organization	General PBC Arts/Culture	Vacation	Family/Friends	Business	Conference/Convention	Other
Primary Cultural Tourists (Non-Residents)	59.1%	40.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Secondary Cultural Tourists (Non-Residents)	0.0%	0.0%	64.2%	20.9%	0.0%	0.0%	14.9%
All Non-Residents	23.4%	16.2%	38.7%	12.6%	0.0%	0.0%	9.0%

Table 15. Visitor Days in Palm Beach County

Days Spent in Palm Beach County	Average # of Days in Palm Beach County
Primary Cultural Tourists (Non-Residents)	16.5
Secondary Cultural Tourists (Non-Residents)	25.7
All Non-Residents	22.1

Table 16. Lodging Details

Lodging Details	Stayed Overnight in PBC	Stayed Overnight in Paid Lodging	Average Nights Free	Average Nights Paid	Average # Rooms	Average Rate
Primary Cultural Tourists (Non-Residents)	52.3%	25.0%	37.8	21.0	1.4	\$174.45
Secondary Cultural Tourists (Non-Residents)	67.2%	32.8%	48.4	23.5	1.4	\$162.14
All Non-Residents	61.3%	29.7%	44.7	22.7	1.4	\$166.24

Table 17. Other Visitor Activities

Other Visitor Activities	Nature/Outdoors	Sports/Recreation	Shopping	Fine Dining	Average Other Cultural Organizations Visited
Primary Cultural Tourists (Non-Residents)	47.5%	30.0%	62.5%	90.0%	3.1
Secondary Cultural Tourists (Non-Residents)	59.4%	31.3%	73.4%	76.6%	3.6
All Non-Residents	54.8%	30.8%	69.2%	81.7%	3.4

Table 18. Average Cultural Visits\*

Average Cultural Visits	Average Other Cultural Organizations Visited
Primary Cultural Tourists Overnight	1.8
Secondary Cultural Tourists Overnight	2.0
Primary Daytrippers	0.9
Secondary Day Trippers	2.9

\* This data was not computed for participating organizations, but is provided here in the aggregate for reference.

Table 19. Visitor Trip Spending

<b>Visitor Trip Spending</b>	<b>Average Total Trip Spending</b>
Primary Cultural Tourists (Non-Residents)	\$2,693.78
Secondary Cultural Tourists (Non-Residents)	\$1,894.20
All Non-Residents	\$2,232.16

Table 20. Trip Spending by Lodging Type (Primary Cultural Tourists)\*

<b>Primary Cultural Tourist Trip Spending by Lodging Type</b>	<b>Trip Spending Per Person</b>
Primary Cultural Tourists in Paid Overnight Lodging	\$1,204.91
Primary Cultural Tourists in Free Overnight Lodging	\$535.60

\* This data was not computed for participating organizations, but is provided here in the aggregate for reference.

Table 21. Future Visitation

<b>Plans to Return to Palm Beach County</b>	<b>Yes</b>	<b>Maybe</b>	<b>No</b>
Primary Cultural Tourists (Non-Residents)	93.0%	7.0%	0.0%
Secondary Cultural Tourists (Non-Residents)	83.6%	16.4%	0.0%
All Non-Residents	87.3%	12.7%	0.0%

# Respondent Demographics

Table 22. Gender

Gender	Male	Female
All Attendees	29.3%	70.7%
Full-Time Residents	29.0%	71.0%
Part-Time Residents	34.5%	65.5%
All Residents	30.6%	69.4%
Primary Cultural Tourists (Non-Residents)	36.4%	63.6%
Secondary Cultural Tourists (Non-Residents)	18.5%	81.5%
All Non-Residents	25.7%	74.3%

Table 23. Race/Ethnicity

Race/Ethnicity	American Indian	Asian	Black/African American	Hawaiian/Pacific Islander	Hispanic/Latino	White/Caucasian	Multi-Racial	Other
All Attendees	2.7%	0.0%	0.7%	0.0%	1.5%	92.6%	1.2%	1.2%
Full-Time Residents	0.9%	0.0%	1.4%	0.0%	1.9%	92.4%	1.9%	1.4%
Part-Time Residents	7.2%	0.0%	0.0%	0.0%	1.2%	90.4%	1.2%	0.0%
All Residents	2.7%	0.0%	1.0%	0.0%	1.7%	91.8%	1.7%	1.0%
Primary Cultural Tourists (Non-Residents)	2.3%	0.0%	0.0%	0.0%	2.3%	93.0%	0.0%	2.3%
Secondary Cultural Tourists (Non-Residents)	3.0%	0.0%	0.0%	0.0%	0.0%	95.5%	0.0%	1.5%
All Non-Residents	2.8%	0.0%	0.0%	0.0%	0.9%	94.5%	0.0%	1.8%

Table 24. Age

Age	Under 18	18-24	25-34	35-44	45-54	55-64	65-74	75 and Over
All Attendees	0.0%	1.2%	3.0%	5.2%	8.2%	25.1%	36.0%	21.3%
Full-Time Residents	0.0%	1.9%	4.3%	4.8%	8.1%	27.6%	30.0%	23.3%
Part-Time Residents	0.0%	0.0%	1.2%	2.4%	4.8%	21.4%	50.0%	20.2%
All Residents	0.0%	1.4%	3.4%	4.1%	7.1%	25.9%	35.7%	22.4%
Primary Cultural Tourists (Non-Residents)	0.0%	0.0%	2.3%	9.3%	11.6%	25.6%	39.5%	11.6%
Secondary Cultural Tourists (Non-Residents)	0.0%	1.5%	1.5%	7.6%	10.6%	21.2%	34.8%	22.7%
All Non-Residents	0.0%	0.9%	1.8%	8.3%	11.0%	22.9%	36.7%	18.3%

Table 25. Household Income

Household Income	Less than \$40,000	\$40,000-\$59,999	\$60,000-\$79,999	\$80,000-\$99,999	\$100,000-\$119,999	\$120,000 or more
All Attendees	8.2%	12.3%	21.6%	19.7%	15.9%	22.2%
Full-Time Residents	11.3%	12.4%	21.5%	20.4%	12.9%	21.5%
Part-Time Residents	7.9%	17.1%	21.1%	14.5%	21.1%	18.4%
All Residents	10.3%	13.7%	21.4%	18.7%	15.3%	20.6%
Primary Cultural Tourists (Non-Residents)	2.4%	7.3%	26.8%	19.5%	17.1%	26.8%
Secondary Cultural Tourists (Non-Residents)	3.2%	9.7%	19.4%	24.2%	17.7%	25.8%
All Non-Residents	2.9%	8.7%	22.3%	22.3%	17.5%	26.2%

Table 26. International Visitors

International Visitors	Percentage of Respondents
United States	98.3%
International	1.7%

Countries of origin: Canada

# Economic Impact

Table 27. Event-Related Spending - Residents

Event-Related Spending - Residents	
<b>Total FY 15 Attendance</b>	<b>582,680</b>
<b>Full-Time Residents</b>	
Percent of Attendees	53.2%
Estimated Attendance	309,986
Average PP Expenditure	\$ 148.64
<b>Estimated Spending</b>	<b>\$ 46,076,319</b>
<b>Part-Time Residents</b>	
Percent of Attendees	20.4%
Estimated Attendance	118,867
Average PP Expenditure	\$ 116.40
<b>Estimated Spending</b>	<b>\$ 13,836,119</b>
<b>All Residents</b>	
Total Estimated Attendance	428,853
<b>Total Event-Related Spending</b>	<b>\$ 59,912,438</b>

Table 28. Event-Related spending – Non Residents

Event-Related Spending - Non-Residents	
<b>Total FY 15 Attendance</b>	<b>582,680</b>
<b>Primary Cultural Tourists</b>	
Percent of Attendees	10.5%
Estimated Attendance	61,181
Average PP Expenditure	\$ 164.86
<b>Estimated Spending</b>	<b>\$ 10,086,300</b>
<b>Secondary Cultural Tourists</b>	
Percent of Attendees	15.9%
Estimated Attendance	92,646
Average PP Expenditure	\$ 195.20
<b>Estimated Spending</b>	<b>\$ 18,084,499</b>
<b>All Non-Residents</b>	
Total Estimated Attendance	153,827
<b>Total Event-Related Spending</b>	<b>\$ 28,170,799</b>

Table 29. Total Event-Related Spending All Residents

Total event-related spending by all attendees combines spending by residents and non-residents.

<b>Total Event-Related Spending by All Attendees</b>	<b>\$ 88,083,237</b>
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**Table 30. Total Culture-Related Spending by All Attendees**

Total culture-related spending by all attendees includes additional trip spending directly attributable to primary cultural tourists.

<b>Additional Culture-Spending by Primary Tourists</b>	
<b>During Entire Visit to Palm Beach County</b>	
Estimated Attendance	61,181
Total Number of Cultural Organizations	3.1
Unique Attendance	19,736
Party Size	3.5
Number of Travel Parties	5,639
Average Trip Expenditure	\$ 4,242.27
Total Trip Spending	\$ 23,921,320
Event-Related Spending	\$ 10,086,300
<b>Total Additional Spending</b>	<b>\$ 13,835,020</b>
<b>Total Culture-Related Spending by All Attendees</b>	<b>\$ 101,918,257</b>

**Table 31. Total Economic Impacts**

<b>Total Economic Impacts</b>	
Full-Time Equivalent Jobs	2,222
Resident Household Income	\$ 42,783,000
Local Governmental Revenue	\$ 4,188,000
State Governmental Revenue	\$ 4,912,000

Table 32. Primary Cultural Tourist Room Nights and Lodging Expenditures\*

<b>Primary Tourists - Room Nights and Lodging Expenditures</b>	
Estimated Attendance	61,181
Total Number of Events	3.1
Unique Attendance	19,736
Party Size	3.5
Number of Travel Parties	5,639
Percent in Paid Lodging	25.0%
Number of Parties in Paid Lodging	1,410
Average Number of Rooms	1.4
Total Rooms	1,974
Average Number of Nights	21.0
Total Room Nights	41,445
Average Rate	\$ 174.45
<b>Total Lodging Expenditures</b>	<b>\$ 7,230,114</b>

\* Primary cultural tourist room nights and lodging expenditures are directly attributable to attendance.

Table 33. Secondary Cultural Tourist Room Nights and Lodging Expenditures

<b>Secondary Tourists - Room Nights and Lodging Expenditures*</b>	
Estimated Attendance	92,646
Total Number of Events	3.6
Unique Attendance	25,735
Party Size	4.0
Number of Travel Parties	6,434
Percent in Paid Lodging	32.8%
Number of Parties in Paid Lodging	2,110
Average Number of Rooms	1.4
Total Rooms	2,954
Average Number of Nights	23.5
Total Room Nights	69,428
Average Rate	\$ 162.14
<b>Total Lodging Expenditures</b>	<b>\$ 11,257,037</b>

\* Secondary cultural tourist room nights and lodging expenditures are not directly attributable to attendance.

Table 34. Total Room Nights and Total Lodging Expenditures All Audiences

<b>Total Room Nights All Audiences</b>	<b>110,873</b>
<b>Total Lodging Expenditures All Audiences</b>	<b>\$ 18,487,151</b>



## Appendix

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## Dear Visitor:

Please take a few minutes to answer the questions on both sides of this form. This survey is part of a study to measure the economic impact of Palm Beach County's cultural attendees. Only one person per party should fill it out. Your answers are anonymous and will be kept confidential. Please answer each question completely and return the survey to the person who gave it to you. *Thank you!*



### SECTION 1: Tell Us About Today's Visit to the Delray Beach Center for the Arts

1. Is this your first visit to the Delray Beach Center for the Arts? ☐ Yes ☐ No
2. Including yourself, how many people are visiting the Center for the Arts with you today? Count only your immediate party (not tour groups). Adults: \_\_\_\_\_ Children (<18): \_\_\_\_\_
3. List the estimated amount of money that you and the members of your immediate party have spent or plan to spend in Palm Beach County specifically as a result of this visit to the Center for the Arts. Remember to include money spent before, during, and after the outing. Use your best estimates.  
(If you are visiting from out of town, please estimate the portion of your spending that is specific to your visit here today.)
- |   |          |
|---|----------|
| A. Admission to the Center for the Arts (e.g., ticket fees or membership dues)                                  | \$ _____ |
| B. Meals, refreshments and/or snacks purchased at the Center for the Arts                                       | \$ _____ |
| C. Meals, refreshments and/or snacks purchased before or after (e.g., at a local restaurant or bar)             | \$ _____ |
| D. Souvenirs, gifts, books, recordings, and/or art  | \$ _____ |
| E. Clothing or accessories specifically to attend the Center for the Arts                                       | \$ _____ |
| F. Local transportation (e.g., gas, parking, tolls, rental car, taxi or bus fare -- <u>not</u> <u>airfare</u> ) | \$ _____ |
| G. Child-care specifically to attend this cultural performance, event, or facility                              | \$ _____ |
| H. Overnight accommodations (e.g., hotel, motel, bed & breakfast, etc.)   | \$ _____ |
| I. Miscellaneous (Please specify): _____  | \$ _____ |
4. How did you learn about arts and cultural opportunities like this one in Palm Beach County? (Check all that apply)
- |  |  |  |                             |                                |                                |
|--|--|--|-----------------------------|--------------------------------|--------------------------------|
| <input type="checkbox"/> Newspaper   | <input type="checkbox"/> Magazine                                    | <input type="checkbox"/> Internet Search | <input type="checkbox"/> TV | <input type="checkbox"/> Hotel | <input type="checkbox"/> Other |
| <input type="checkbox"/> Social Media (online such as Facebook, Twitter, etc.) | <input type="checkbox"/> Word of Mouth (not online/not social media) |  |                             |                                |                                |
5. If this performance, event or cultural activity were not available, would you have traveled to someplace other than Palm Beach County in order to attend a similar cultural experience? (Check one)
- |   |
|---|
| <input type="checkbox"/> No, I would have <b>skipped</b> the cultural experience altogether   |
| <input type="checkbox"/> No, I would have <b>replaced</b> it with another cultural experience <u>in Palm Beach County</u>                   |
| <input type="checkbox"/> Yes, I would have traveled to someplace else to attend a similar cultural experience (e.g., not Palm Beach County) |
6. What is the ZIP code of your primary residence? (If you are staying in a second home or other vacation property that you own, provide that ZIP code.) ZIP Code: \_\_\_\_\_
- 6a. If you are visiting from outside the U.S., what is your country of origin? Country: \_\_\_\_\_
7. Which of the following best describes you? (Check one)
- |  |
|--|
| <input type="checkbox"/> I am <u>not</u> a resident of Palm Beach County >> <b>SKIP TO SECTION 2 ON OTHER SIDE</b>   |
| <input type="checkbox"/> I am a <b>part-time/seasonal resident</b> of Palm Beach County (e.g., second home or timeshare) >> <b>Continue with Question 7a</b> |
| <input type="checkbox"/> I am a <b>full-time resident</b> of Palm Beach County (e.g., primary residence is located here) >> <b>Continue with Question 7a</b> |
- 7a. As a direct result of this visit to the Center for the Arts, are you staying overnight in paid lodging located in Palm Beach County? For example, are you staying in a hotel/motel for convenience or for a night away from home?
- |   |
|---|
| <input type="checkbox"/> NO, I am not staying overnight in paid-lodging (e.g., hotel/motel) >> <b>SKIP TO SECTION 3 ON OTHER SIDE</b> |
| <input type="checkbox"/> YES, I am staying overnight in paid-lodging >> <b>Continue with Questions 7b and 7c</b>                      |
- 7b. How many nights will you spend in paid lodging? # \_\_\_\_\_
- 7c. How many rooms will your party use each night? # \_\_\_\_\_ >> **SKIP TO SECTION 3**

## SECTION 2: For NON-RESIDENTS of Palm Beach County ONLY

8. How many times have you visited Palm Beach County during the past five years? (Check one)  
☐ This is my first visit      ☐ I have visited 1-2 times      ☐ I have visited 3 or more times
9. How did you travel to Palm Beach County for this trip? (Check all that apply)  
☐ Car      ☐ Bus      ☐ Boat      ☐ Plane      ☐ Train      ☐ Other
10. When did you make your decision to visit the Center for the Arts? (Check one)  
☐ Before arriving in Palm Beach County      ☐ After arriving in Palm Beach County
11. To what degree were Palm Beach County's arts and cultural opportunities a factor in the decision to make this trip?  
☐ A significant factor      ☐ A contributing factor      ☐ Not a factor at all
12. What is the **PRIMARY REASON** for this trip to Palm Beach County? (Check one)  
☐ I am here specifically to visit the Center for the Arts      ☐ I am here to conduct business  
☐ I am here specifically to experience Palm Beach County arts/culture      ☐ I am attending a conference or convention  
☐ I am here on a vacation/holiday      ☐ I am here for a different reason  
☐ I am here to visit family and/or friends
13. How many days do you plan to spend in Palm Beach County on this trip (including partial days)? # \_\_\_\_\_
14. Are you staying overnight in Palm Beach County as part of your trip?  
☐ **NO**, I am not staying overnight in Palm Beach County at all during this visit >>**SKIP TO QUESTION 15**  
☐ **YES**, I am staying overnight in Palm Beach County during this visit >>**Continue with Questions 14a-14d**
- 14a. How many nights will you spend in **FREE** lodging (e.g., at the home of family/friends)? # \_\_\_\_\_
- 14b. How many nights will you spend in **PAID** lodging (e.g., hotel/motel, vacation rental, campground)? # \_\_\_\_\_
- 14c. How many rooms will your party use each night in **PAID** lodging? # \_\_\_\_\_
- 14d. What is the average room rate your party will be charged per room in **PAID** lodging? \$ \_\_\_\_\_
15. In addition to the Center for the Arts, how many other arts and cultural destinations have you visited/attended (or do you plan to visit/attend) in Palm Beach County during this trip? These may include cultural performances, museums, arts/science centers, zoos, historic sites, nature preserves, for example. # \_\_\_\_\_
16. Which of the following activities will you participate in during this visit to Palm Beach County? (Check all that apply)  
☐ Nature/outdoor activities (e.g., beach, boating, state parks, wildlife viewing)      ☐ Shopping  
☐ Sports and recreation (e.g., golf, fishing, biking, hiking)      ☐ Fine dining
17. Please **ESTIMATE** how much your immediate travel party will spend on all purchases it will make in Palm Beach County during your entire trip. Include all overnight lodging, meals, drinks, admissions, activities, local transportation, parking, gifts, and souvenirs. Consider your entire "budget" for this trip, and include only an estimate of the dollars that you will spend in Palm Beach County. **Your best estimate is fine!** \$ \_\_\_\_\_
18. Do you anticipate visiting Palm Beach County again in the future?      ☐ Yes      ☐ Maybe      ☐ No

## SECTION 3: Finally, Please Tell Us About Yourself

19. Your gender:  
☐ Male      ☐ Female
20. Your race/ethnicity: (Check all that apply)  
☐ American Indian or Alaska Native      ☐ Hawaiian or Pacific Islander      ☐ Multi-racial / Multi-ethnic  
☐ Asian      ☐ Hispanic, Latino(a), or Spanish origin      ☐ Other (not listed here)  
☐ Black or African American      ☐ White/Caucasian (non-Hispanic)
21. Your age:  
☐ <18      ☐ 18-24      ☐ 25-34      ☐ 35-44      ☐ 45-54      ☐ 55-64      ☐ 65-74      ☐ 75+
22. Your annual household income range:  
☐ Less than \$40,000      ☐ \$60,000 - \$79,999      ☐ \$100,000 - \$119,999  
☐ \$40,000 - \$59,999      ☐ \$80,000 - \$99,999      ☐ \$120,000 or more