

MARKET RESEARCH FOR CITY FESTIVALS

SPECIFICATION NO. 110845

FINAL SUMMARY REPORT

CHICAGO DEPARTMENT OF
DCASE
CULTURAL AFFAIRS & SPECIAL EVENTS



CS CUSTOM INTERCEPT
SOLUTIONS





November 15, 2013

Mr. Jamey Lundblad
Director Public Affairs, Marketing and Communications
Chicago Department of Cultural Affairs and Special Events
78 East Washington Street
Chicago, IL 60602

Dear Mr. Lundblad,

Custom Intercept Solutions (CIS) is pleased to present this summary report to the Chicago Department of Cultural Affairs and Special Events (DCASE). We have completed the study process related to the Market Research and Consulting Services for City Festivals, Specification #110845.

Over the course of the summer, CIS has worked closely with DCASE leadership and staff in conducting onsite market research at numerous City of Chicago festivals, events and other arts & cultural programming. The purpose of the market research was to collect direct event attendee feedback related to customer satisfaction, event performance, spending levels and attendee demographics among other topics. Following each event, CIS created and delivered reports summarizing the survey results and quantifying the economic and fiscal impacts delivered, to the extent possible, from each event.

The final summary report to follow provides an Executive Summary outlining key findings of the research initiative as well as cross-tabbed data tables which present cumulative and side-by-side data comparisons for each event. We sincerely appreciate the assistance and cooperation that DCASE has provided in the completion of this important market research initiative.

Regards,

Custom Intercept Solutions

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EXECUTIVE SUMMARY



The Department of Cultural Affairs and Special Events (DCASE) is dedicated to promoting and supporting Chicago's arts and culture sector. This includes, but is not limited to: fostering the development of Chicago's non-profit arts sector, independent working artists, and for-profit arts businesses; presenting high-quality, free or low-fee cultural programs accessible to residents and visitors; and marketing the City's cultural assets to local, regional and global audiences. The Department produces nearly 2,000 public programs, events and support services annually, generating millions in economic impact for the City of Chicago.

Custom Intercept Solutions (CIS) was retained by DCASE in early 2013 to provide market research and consulting services for City Festivals. As part of the engagement, CIS provided DCASE with a complete research solution including but not limited to survey design, in-field staffing, data compilation and summary reporting to collect onsite market research at 12 DCASE events held from June to October 2013. For each event, CIS provided onsite field staff over the course of multiple days to collect a random and representative sample of attendees. DCASE project representatives provided a survey quota for each event

at the outset of the engagement. Over the course of the project, CIS successfully collected the required number of surveys at all 12 events, ultimately *conducting 2,570 intercept surveys of event attendees* – representing a 25% surplus over original project scope specifications.

Primary survey topics included attendee event satisfaction, likelihood of future attendance, potential areas for event improvement, spending outside of the event and attendee demographics among others. In addition to designing the survey and performing all data collection and storage services, CIS developed summary reports presenting the key findings from each event and performed advanced economic and fiscal impact modeling to quantify, to the extent possible, the impacts that each event provided to the local economy.

The remainder of the Executive Summary outlines the key findings of the cumulative data collected over the course of the initiative.

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EXECUTIVE SUMMARY

KEY FINDINGS

- Cumulatively, approximately 44% of all survey respondents came from outside of Chicago – more than one-quarter of all respondents were from outside of Illinois. Of non-local respondents, approximately 40% stayed in Chicago overnight (*slide 6*)
- Large weekend events tended to be primary draws of out-of-town visitors into Chicago while smaller scale and/or longer running events and venues tended to be popular attractions for Chicago visitors while not necessarily being the primary reason for their visit to the destination (*slide 8*)
- Satisfaction with specific event attributes (i.e. location, dates, acoustics, etc.) were relatively high across all events with a majority receiving average ratings over 4.0 on a 5-point scale – the exception being ‘Parking’ which was the lowest rated attribute across all events (*slide 11*)
- Overall satisfaction with all events was high with each surveyed event receiving an average satisfaction rating of 4.1 or higher on a 5-point scale – several events received no negative ratings (1’s or 2’s) (*slide 13*)
- Similarly, respondent’s likelihood to return to the event in the future was also positive with each event receiving an average rating of 4.2 or higher on a 5-point scale (*slide 14*)
- There existed significant attendance cross-over between a majority of the City events surveyed. The event with the most attendance cross-over was World Music Festival Chicago while the event with the least cross-over was the Chicago Air & Water Show (*slide 15*)

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KEY FINDINGS *(continued)*

- A majority of respondents from each event indicated that they would spend money in Chicago during their trip outside of the event at which they were surveyed – per person spending *outside of the event* ranged from a low of \$10.65 to a high of \$60.32 *(slides 19, 20)*
- Highlights of the estimated economic and fiscal impacts of the more than 5,000,000 event attendees represented by the surveys conducted, include: *(slide 25)*
 - New Direct Spending of approximately \$159 million;
 - Total Output of approximately \$256 million;
 - Total Employment of approximately 2,680 jobs;
 - Total Earnings of approximately \$95 million; and,
 - Annual City of Chicago tax revenue of approximately \$5.9 million.

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EVENT SCHEDULE



The table below presents the events surveyed as part of Specification #110845 and includes event name, location, in-field survey dates, number of days surveys were conducted, targeted number of survey completes as identified in the RFP and actual number of completed surveys collected.

#	Event	Location	Survey Dates	# of Dates /Events	Survey Completes	
					Targeted	Collected
1	Chicago Blues Festival	Grant Park	6/7 - 6/9	3	200	311
2	Chicago Gospel Music Festival	Ellis Park	6/22 - 6/23	2	150	233
3	Downtown Sound	Millennium Park	7/1; 7/15; 7/29	3	100	126
4	Loops and Variations	Millennium Park	6/27; 7/18; 8/28	3	100	124
5	Taste of Chicago	Grant Park	7/12 - 7/14	3	400	451
6	Chicago Air & Water Show	North Avenue Beach	8/17 - 8/18	2	300	373
7	Made in Chicago: World Class Jazz	Millennium Park	7/25; 8/8; 8/22	3	100	122
8	Chicago Jazz Festival	Millennium Park	8/30 - 9/1	3	200	239
9	World Music Festival Chicago	Various	9/14; 9/17; 9/20	4	100	140
10	Chicago SummerDance	Grant Park	8/9 - 8/10; 9/6 - 9/7	4	100	106
11	Chicago Cultural Center	Chicago Cultural Center	9/13; 10/11; 10/18	3	200	233
12	Maxwell Street Market	Maxwell Street Market	9/15; 9/29; 10/13	3	100	112
TOTAL				36	2,050	2,570

The following slides provide a summary analysis of similar questions appearing in the event surveys, cross-tabbed by event, of the data gathered during the summer festival market research initiative. Within each table, the event(s) with the highest respondent percentages for each question are highlighted in blue and the lowest percentages are highlighted in red. Below each table, a brief interpretation of the data is provided.

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EVENT DATA

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RESPONDENT RESIDENCY



Question: Which of the following best describes you:

RESIDENCY	Blues Festival	Gospel Music Festival	Downtown Sound	Loops & Variations	Taste of Chicago	Air & Water	MIC: World Class Jazz	Jazz Festival	World Music Festival	Summer Dance	Cultural Center	Maxwell St. Market	CUMULATIVE
Chicago Resident	49%	69%	66%	62%	41%	65%	64%	44%	58%	66%	51%	74%	56%
Suburban Resident	19%	17%	16%	9%	26%	22%	16%	21%	22%	17%	12%	19%	19%
Illinois Resident	5%	7%	1%	3%	6%	6%	2%	2%	3%	1%	1%	0%	4%
US outside Illinois	21%	6%	9%	17%	23%	3%	10%	23%	11%	13%	24%	5%	16%
International	6%	2%	9%	9%	4%	3%	9%	11%	6%	3%	11%	2%	6%
Average Mileage ⁽¹⁾	173.5	35.6	75.0	190.6	110.1	52.4	103.2	152.3	133.4	83.8	218.8	36.2	113.9

⁽¹⁾Indicates the average mileage that each U.S. resident that provided a valid zip code travelled to the event (calculated by respondent zip code)

As shown in the table above, Maxwell Street Market attracted the most “local” audience with approximately 93% of respondents coming from either Chicago or suburban Chicago. Other events that attracted relatively local (defined as Chicago and suburban Chicago) audiences included: the Chicago Air & Water Show (87%), Chicago Gospel Music Festival (86%), Chicago SummerDance (83%) and Downtown Sound (82%).

The events that attracted the largest percentage of respondents from *outside of Illinois* included Chicago Cultural Center programming (35%), Chicago Jazz Festival (34%), Taste of Chicago (27%) and Chicago Blues Festival (27%).

When looking at the average distance travelled by U.S. respondents, the Chicago Gospel Music Festival had the shortest average travel distance of 35.6 miles. Other events that tended to have shorter average respondent travel distances included Maxwell Street Market (36.2 mi) and the Chicago Air & Water Show (52.4 mi). Alternatively, the Chicago Cultural Center programming had the farthest average respondent travel distance at 218.8 miles. It should be noted that the specific average mileage **value** is not as significant as how each event’s mileage number compares to one another.

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RESPONDENT RESIDENCY

Question: Please provide your residential zip code:

<u>Distance From event</u>	<u>Percent of Respondents</u>	<u>Number of Respondents</u>
Chicago Residents	48%	1,244
Illinois Residents		
Up to 25 miles	18%	453
26 to 50 miles	7%	179
51 to 75 miles	1%	22
76 or more miles	1%	21
Non-Illinois U.S. Residents		
Up to 250 miles	5%	132
251 to 500 miles	3%	70
501 to 750 miles	2%	59
751 to 1,000 miles	2%	45
1,001 to 1,250 miles	1%	13
1,251 to 1,500 miles	0%	7
1,501 to 1,750 miles	1%	31
1,751 or more miles	1%	24
International Visitors	6%	153
Refused/Invalid Entries	5%	117
TOTAL	100%	2,570

As shown in the table, approximately two-thirds of all survey respondents reside within 25 miles of the event they attended. Additionally, 25% of respondents reside outside of Illinois.

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REASON FOR VISIT AND PREVIOUS VISITATION



Questions:

Is this event the primary reason for your visit to Chicago today?*

Have you attended this event previously? **

Event Attendance	Blues Festival	Gospel Music Festival	Downtown Sound	Loops & Variations	Taste of Chicago	Air & Water	MIC: World Class Jazz	Jazz Festival	World Music Festival	Summer Dance	Cultural Center	Maxwell St. Market	CUMULATIVE
Event primary reason for visit*	65%	88%	47%	15%	74%	68%	25%	56%	46%	33%	20%	66%	57%
Attended event previously**	66%	82%	67%	40%	72%	72%	61%	54%	59%	61%	63%	81%	71%

As expected, large weekend events such as the Chicago Blues Festival, Taste of Chicago and Chicago Air & Water Show tend to be primary draws of out-of-town visitors into Chicago. Smaller scale and/or longer running events and venues such as Loops & Variations, Made in Chicago: World Class Jazz, Chicago SummerDance and Chicago Cultural Center programming tend to be popular attractions for Chicago visitors while not necessarily being the primary reason for their visit to the destination.

Repeat visitation was high for a majority of the surveyed events. Loops & Variations was the only event with less than 50% of respondents having attended previously.

*Asked only of those respondents who indicated they were from outside of Chicago. It was assumed that Chicago residents would have been in Chicago regardless of the event occurring.

**Values indicate the percentage of respondents that had attended the event previously.

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GROUP COMPOSITION



Questions:

How many people in your group, including yourself, are ages 18 and older?

How many people in your group are ages 17 and younger?

Group Members	Blues Festival	Gospel Music Festival	Downtown Sound	Loops & Variations	Taste of Chicago	Air & Water	MIC: World Class Jazz	Jazz Festival	World Music Festival	Summer Dance	Cultural Center	Maxwell St. Market	CUMULATIVE
Adult (18+)	2.8	3.1	2.7	2.0	2.5	2.1	2.6	2.4	2.1	2.8	2.4	2.5	2.5
Children (< 18)	0.2	1.1	0.2	0.1	0.6	1.0	0.1	0.3	0.3	0.1	0.1	0.6	0.5
Total	3.0	4.2	2.9	2.1	3.1	3.1	2.7	2.7	2.4	2.9	2.5	3.1	3.0

The table above shows the average number of adults and children comprising each respondent group. The Chicago Gospel Music Festival had the largest total average group size of 4.2 people – which was more than one full person larger than the second largest event group. The smallest average group size of 2.1 total people was provided by Loops & Variations respondents. These values are presented again later in the report in coordination with respondent demographic data to assist in the development of event attendee profiles.

Note: Values in the table indicate the average number of adults and children provided by survey respondents.

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TIMING OF ATTENDANCE DECISION



Question: Approximately how long have you been planning on attending today's event?

Attendance Decision	Blues Festival	Gospel Music Festival	Downtown Sound	Loops & Variations	Taste of Chicago	Air & Water	MIC: World Class Jazz	Jazz Festival	World Music Festival	Summer Dance	Cultural Center	Maxwell St. Market	CUMULATIVE
Decided Today	20%	12%	51%	66%	21%	32%	53%	26%	41%	41%	50%	46%	33%
Less than 1 Week	20%	17%	15%	17%	31%	29%	20%	19%	23%	23%	21%	28%	23%
1 to 2 Weeks	15%	19%	16%	8%	19%	17%	12%	13%	19%	14%	12%	12%	16%
3 to 4 Weeks	4%	19%	6%	4%	5%	5%	7%	7%	7%	8%	6%	1%	7%
More than 1 Month	42%	32%	13%	5%	25%	16%	8%	35%	9%	14%	10%	13%	22%

As shown in the table, respondents tended to plan further in advance for major weekend events including the Chicago Blues Festival, Chicago Gospel Music Festival, Taste of Chicago, Chicago Air & Water Show and Chicago Jazz Festival. Several smaller, weekday events such as Downtown Sound, Loops & Variations, Made in Chicago: World Class Jazz and Chicago Cultural Center programming had 50% or more of respondents make their attendance decision the day of the event.

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EVENT ATTRIBUTE SATISFACTION



Question: On a scale from 1 to 5, with 1 being 'Poor' and 5 being 'Excellent', please rate your satisfaction with the following event attributes:*

Event Attribute	Blues Festival	Gospel Music Festival	Downtown Sound	Loops & Variations	Taste of Chicago	Air & Water	MIC: World Class Jazz	Jazz Festival	World Music Festival	Summer Dance	Cultural Center	Maxwell St. Market	CUMULATIVE
Location	4.9	4.5	4.8	4.8	4.6	4.8	4.8	4.8	4.9	4.8	4.6	4.4	4.7
Acoustics	4.7	4.7	4.6	4.7	N/A	N/A	4.7	4.7	4.6	4.8	4.4	N/A	4.6
Event Dates	4.8	4.7	4.5	4.4	4.2	4.7	4.5	4.8	4.7	4.7	N/A	N/A	4.6
Musical Acts	4.6	4.7	4.4	4.0	4.1	N/A	4.4	4.7	4.8	4.7	4.6	N/A	4.5
Parking	3.6	4.3	3.5	3.7	3.3	2.8	3.5	3.4	3.7	3.1	3.3	2.8	3.4
Don't Change a Thing ⁽¹⁾	29%	31%	28%	32%	15%	49%	30%	37%	43%	43%	45%	14%	33%

⁽¹⁾A follow-up question asked what changes the City should make to improve each event, the percentage of respondents that indicated 'Don't change a thing' is included here

In general, the majority of event attributes tested received relatively positive average ratings of 4.0 or higher on a 5-point scale. The one attribute that received consistently low ratings was *Parking*. It should be noted that the Chicago Gospel Music Festival which received a 4.3 average *Parking* rating, occurred outside of downtown Chicago unlike most other events.

After rating each event attribute, respondents were asked how the City should best allocate resources to improve each event in the future. Specific answer options varied widely for each event but always included a 'Don't change a thing' option. The event that received the largest percentage of 'Don't change a thing' responses was the Chicago Air & Water Show. The event that received the lowest percentage of these responses was the Maxwell Street Market indicating that a majority of respondents felt the event could be improved .

Note: Values in the chart represent the average rating received by each event attribute on a 5-point scale
*Event attributes varied by event. Not all attributes appeared in each event survey

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TRANSPORTATION METHOD

Question: How did you arrive at today's event?*

Transportation Method	World Music Festival	Chicago Summer Dance	Chicago Cultural Center	Maxwell St. Market	CUMULATIVE
Personal Vehicle	26%	20%	8%	61%	25%
Walked	25%	39%	42%	15%	32%
CTA	33%	30%	32%	17%	29%
Metra	4%	5%	8%	1%	5%
Bus	4%	3%	4%	4%	4%
Taxi	1%	2%	2%	0%	1%
Other	6%	2%	3%	2%	4%

The table above indicates the method of transportation used by survey respondents to arrive at the surveyed event. This question was added to the survey and only appeared for the last four surveyed events. The majority of respondents at the Maxwell Street Market arrived to the Market utilizing a personal vehicle. The primary transportation methods for the other three events were fairly evenly split between walking and CTA.

*This question was added to the survey for the last four surveyed events

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EVENT SATISFACTION



Question: On a scale from 1 to 5, with 1 being 'Poor' and 5 being 'Excellent', how would you rate your overall satisfaction with today's event?

Event Satisfaction	Blues Festival	Gospel Music Festival	Downtown Sound	Loops & Variations	Taste of Chicago	Air & Water	MIC: World Class Jazz	Jazz Festival	World Music Festival	Summer Dance	Cultural Center	Maxwell St. Market	CUMULATIVE
Positive (4 - 5)	95%	92%	95%	79%	79%	86%	94%	84%	95%	92%	94%	86%	88%
Neutral (3)	4%	6%	4%	15%	17%	11%	5%	15%	5%	8%	6%	10%	10%
Negative (1 - 2)	0%	1%	1%	7%	4%	3%	1%	0%	0%	1%	0%	4%	2%
Average Rating	4.6	4.6	4.6	4.2	4.1	4.5	4.6	4.4	4.6	4.6	4.6	4.4	4.5

Overall event satisfaction ratings were positive across the board with all 12 surveyed events receiving an average rating of at least 4.1 on a 5-point scale. The cumulative average rating received from all event respondents was approximately 4.5.

Positive ratings (4's and 5's) ranged from a low of approximately 79% of respondents at Loops & Variations and Taste of Chicago to a high of 95% at Chicago Blues Festival, Downtown Sound and World Music Festival Chicago. Overall, negative ratings (1's and 2's) represented a small percentage of respondents across all events. Events that received no negative ratings included Chicago Blues Festival, Chicago Jazz Festival, World Music Festival Chicago and Chicago Cultural Center programming.

Note: Values in the chart represent the average rating received by each event attribute on a 5-point scale

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LIKELIHOOD TO RETURN



Question: On a scale from 1 to 5, with 1 being 'Definitely Won't' and 5 being 'Definitely Will', how likely are you to return to the event in the future?

	Blues Festival	Gospel Music Festival	Downtown Sound	Loops & Variations	Taste of Chicago	Air & Water	MIC: World Class Jazz	Jazz Festival	World Music Festival	Summer Dance	Cultural Center	Maxwell St. Market	CUMULATIVE
Positive (4 - 5)	91%	94%	92%	76%	79%	84%	92%	88%	89%	90%	89%	88%	87%
Neutral (3)	6%	4%	7%	19%	12%	10%	7%	8%	8%	8%	9%	7%	9%
Negative (1 - 2)	3%	2%	0%	4%	9%	6%	1%	3%	3%	3%	2%	5%	4%
Average Rating	4.6	4.7	4.7	4.2	4.2	4.4	4.6	4.5	4.6	4.7	4.6	4.6	4.5

Similar to the overall event satisfaction ratings, average ratings related to respondents' likelihood to return to the event in the future were positive across all events ranging from a low of approximately 4.2 for Loops & Variations and Taste of Chicago to a high of 4.7 for Chicago Gospel Music Festival, Downtown Sound and Chicago SummerDance. The average cumulative rating across all events was approximately 4.5.

It should be noted that negative ratings for this question do not necessarily reflect poor event satisfaction as often these ratings are provided by out-of-town guests.

Note: Values in the chart represent the average rating received by each event attribute on a 5-point scale

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OTHER CITY EVENT ATTENDANCE



Question: Which, if any, of the following other free City festivals and arts + cultural events have you attended? (select all)*

City Event Attended	Blues Festival	Gospel Music Festival	Downtown Sound	Loops & Variations	Taste of Chicago	Air & Water	MIC: World Class Jazz	Jazz Festival	World Music Festival	Summer Dance	Cultural Center	Maxwell St. Market	CUMULATIVE
Taste of Chicago	53%	61%	46%	36%	N/A	35%	43%	34%	31%	42%	37%	41%	35%
Millennium Park Concerts	34%	33%	57%	44%	29%	19%	42%	26%	61%	41%	44%	26%	28%
Chicago Air & Water Show	32%	38%	41%	35%	33%	N/A	30%	20%	31%	32%	24%	39%	27%
Chicago Jazz Festival	37%	38%	29%	34%	18%	18%	39%	N/A	47%	42%	30%	28%	27%
Chicago Blues Festival	N/A	29%	33%	31%	31%	18%	40%	32%	41%	36%	28%	28%	26%
Chicago SummerDance	18%	14%	18%	23%	10%	4%	22%	12%	37%	N/A	18%	19%	14%
Chicago Gospel Music Festival	17%	N/A	13%	16%	14%	10%	18%	14%	21%	20%	15%	21%	14%
Chicago Cultural Center	16%	20%	18%	19%	9%	2%	20%	13%	42%	16%	N/A	6%	13%
World Music Festival Chicago	12%	11%	15%	17%	8%	4%	17%	12%	N/A	14%	14%	13%	10%
None of the Above ⁽¹⁾	30%	18%	16%	23%	34%	49%	30%	42%	21%	32%	36%	21%	32%
'None' Out-of-Town % ⁽²⁾	77%	40%	60%	76%	74%	39%	67%	69%	66%	35%	70%	42%	61%

⁽¹⁾Indicates the percentage of respondents that had not attended any of the listed City events

⁽²⁾Indicates the percentage of respondents that had not attended any other City events AND are out-of-town visitors to Chicago

The table above effectively illustrates the cross-over between City events. Clearly, the event with the largest cross-over with other City festivals and arts & cultural events is the World Music Festival Chicago. The event with the least amount of cross-over with other City events is the Chicago Air & Water Show.

* The table includes only the free City festivals and arts & cultural events that were selected by at least 10% of cumulative survey respondents. Events are listed by percentage of cumulative respondents that attend each event.

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NON-CITY EVENT ATTENDANCE



Question: What other local, non-City festivals and arts + cultural events do you attend? (select all)

Non City Event Attended ⁽¹⁾	Blues Festival	Gospel Music Festival	Downtown Sound	Loops & Variations	Taste of Chicago	Air & Water	MIC: World Class Jazz	Jazz Festival	World Music Festival	Summer Dance	Cultural Center	Maxwell St. Market	CUMULATIVE
Museum Exhibitions	38%	45%	43%	47%	30%	25%	35%	31%	60%	44%	57%	24%	38%
Theater/Dance Performances	29%	29%	34%	32%	18%	12%	31%	20%	34%	37%	31%	15%	24%
Lollapalooza	24%	21%	28%	28%	21%	17%	N/A	N/A	13%	8%	N/A	N/A	14%
Pitchfork	14%	2%	19%	22%	6%	4%	N/A	N/A	11%	2%	N/A	N/A	6%
None of the Above ⁽²⁾	43%	36%	31%	27%	37%	58%	44%	52%	26%	41%	16%	50%	40%
None! Out-of-Town % ⁽³⁾	67%	35%	49%	48%	72%	38%	43%	65%	61%	42%	55%	29%	53%

⁽¹⁾Events listed varied widely between surveyed events. Only those events that were attended by more than 5% of cumulative survey respondents appear in the table*

⁽²⁾Indicates the percentage of respondents that had not attended any of the other non-City events listed

⁽³⁾Indicates the percentage of respondents that had not attended any other City events AND were out-of-town visitors to Chicago

Once again, the Chicago Air & Water Show had the lowest attendee cross-over with non-City events with nearly 60% of Chicago Air & Water Show attendees never having attendee a listed event. Overall, the Chicago Cultural Center programming had the highest cross-over with approximately 84% having attended a non-City event.

*Other events that appeared in this question (events varied based on surveyed event type) include: Art Institute of Chicago, Goodman Theatre, Green City Market, Harris Theater for Music and Dance, Randolph Street Market Festival, Square Roots, Hyde Park Jazz Festival, Umbrella Music Festival, Latin Jazz Festival, Taste of Randolph, Ribfest Chicago and Chicago Gourmet

RESPONDENT SPENDING DATA

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PERSONAL TRAVEL PARTY SIZE & OVERNIGHT STAY



Question: Please indicate the number of people in your PERSONAL travel party including yourself, that is, the number of people you are personally responsible for/will be sharing expenses with:

Travel Party	Blues Festival	Gospel Music Festival	Downtown Sound	Loops & Variations	Taste of Chicago	Air & Water	MIC: World Class Jazz	Jazz Festival	World Music Festival	Summer Dance	Cultural Center	Maxwell St. Market	CUMULATIVE
# in Travel Party ⁽¹⁾	2.0	2.1	1.9	1.8	2.3	2.4	1.8	2.2	1.7	1.9	1.6	2.2	2.1
Staying overnight ⁽²⁾	28%	11%	17%	26%	17%	10%	23%	28%	16%	18%	34%	16%	20%
Primary reason for visit	65%	88%	47%	15%	74%	68%	25%	56%	46%	33%	20%	66%	57%

⁽¹⁾Includes the number of people in each respondents 'personal travel party' defined as the individuals that they are personally responsible for or will share expenses with

⁽²⁾Indicates the percentage of total respondents staying away from home in Chicago - includes ALL respondents

Personal travel party size ranged from a low of approximately 1.6 people for Chicago Cultural Center programming to a high of 2.4 people at the Chicago Air & Water Show. The percentage of respondents that indicated they were staying overnight away from home in Chicago during their trip ranged from a low of approximately 10% of Chicago Air & Water Show respondents to a high of 34% of Chicago Cultural Center programming respondents.

The bottom row in the table indicates what percentage of out-of-town visitors came to Chicago primarily for the event at which they were surveyed. This percentage provides context to the values presented throughout the spending section of this report which can be directly attributable to each event.

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ATTENDEE SPENDING CATEGORIES



Question: Thinking about the rest of your trip, within which of the following spending categories will/has your PERSONAL travel party incurred expenses while in Chicago OUTSIDE of the event you attended?

Spending Category	Blues Festival	Gospel Music Festival	Downtown Sound	Loops & Variations	Taste of Chicago	Air & Water	MIC: World Class Jazz	Jazz Festival	World Music Festival	Summer Dance	Cultural Center	Maxwell St. Market	CUMULATIVE
Eating & Drinking	69%	49%	65%	60%	59%	63%	69%	68%	60%	60%	69%	79%	63%
Local Transportation	41%	22%	34%	26%	42%	23%	23%	24%	19%	20%	39%	9%	30%
Retail Shopping	14%	13%	7%	10%	14%	10%	9%	16%	11%	4%	24%	38%	14%
Recreation & Entertainment	12%	15%	6%	10%	12%	6%	10%	11%	9%	5%	32%	4%	12%
Other/Miscellaneous	12%	0%	7%	8%	15%	8%	11%	12%	8%	7%	9%	3%	9%
None of the Above	13%	33%	21%	29%	10%	27%	24%	20%	29%	29%	23%	13%	21%

Cumulatively, nearly 80% of all survey respondents indicated that they would spend money while in Chicago outside of the event they were attending. This percentage ranged from a high of approximately 90% of Taste of Chicago respondents to a low of approximately 67% of Chicago Gospel Music Festival respondents.

In general, higher values indicate that event attendance is part of the visit to the Chicago destination for respondents while lower percentages typically indicate that a large percentage of attendees came to Chicago only for the event.

SPECIFICATION #110845 FINAL SUMMARY REPORT

CATEGORY SPENDING LEVELS



Question: Please indicate your personal travel party’s average DAILY spending within each of the following categories while in the Chicago area during this trip:

Spending Category	Blues Festival	Gospel Music Festival	Downtown Sound	Loops & Variations	Taste of Chicago	Air & Water	MIC: World Class Jazz	Jazz Festival	World Music Festival	Summer Dance	Cultural Center	Maxwell St. Market	CUMULATIVE
Spending at Event	\$32.65	\$15.42	\$10.88	\$8.93	\$33.33	\$17.83	\$14.84	\$19.29	\$18.44	\$7.60	\$0.00	\$24.04	\$20.77
Eating & Drinking	\$30.53	\$8.50	\$11.68	\$14.40	\$16.64	\$10.81	\$12.70	\$18.02	\$17.72	\$10.23	\$27.79	\$13.50	\$17.55
Lodging	\$25.79	\$6.43	\$5.11	\$13.04	\$14.80	\$5.94	\$11.48	\$20.55	\$5.94	\$8.35	\$26.65	\$2.60	\$14.28
Local Transportation	\$5.15	\$2.32	\$2.57	\$2.36	\$3.88	\$2.50	\$2.18	\$2.63	\$1.56	\$3.05	\$7.23	\$0.61	\$3.91
Retail Shopping	\$10.61	\$3.68	\$4.15	\$4.34	\$6.77	\$3.82	\$5.30	\$6.89	\$2.23	\$1.09	\$16.62	\$10.10	\$7.63
Recreation & Entertainment	\$6.39	\$3.02	\$2.72	\$2.65	\$5.11	\$1.47	\$4.29	\$3.23	\$5.66	\$2.10	\$16.63	\$0.32	\$5.64
Other/Miscellaneous	\$2.57	\$0.20	\$0.98	\$1.43	\$2.65	\$1.03	\$1.67	\$1.74	\$0.97	\$1.49	\$1.59	\$0.90	\$1.78
TOTAL DAILY GROUP SPENDING	\$113.69	\$39.57	\$38.09	\$47.15	\$83.18	\$43.40	\$52.46	\$72.35	\$52.52	\$33.91	\$96.51	\$52.07	\$50.79
Per Person ⁽¹⁾	\$56.85	\$18.84	\$20.05	\$26.19	\$36.17	\$18.08	\$29.14	\$32.89	\$30.89	\$17.85	\$60.32	\$23.67	\$24.19

⁽¹⁾Indicates the aggregate spending based on the average travel party size

The table above presents the average daily spending by category for personal travel parties of each event. Total daily *group* spending occurring *outside of the event* ranged from a low of \$24.15 at the Chicago Gospel Music Festival to a high of approximately \$96.51 at Chicago Cultural Center programming. Generally, larger spending amounts outside of the event indicates that event attendance was part of the trip to Chicago and not the sole purpose.

The highest average amount spent *at the event* by personal travel parties occurred at the Taste of Chicago (\$33.33) and was closely followed by the Chicago Blues Festival (\$32.65).

It’s important to note that the values presented in the table incorporate all aggregate spending indicated by respondents. No considerations have been made to eliminate *displaced** spending. These considerations are incorporated in the economic and fiscal impact summary analysis to follow.

Note: Values in the chart represent aggregate daily spending levels

*Displaced spending refers to spending that likely would have occurred in Chicago regardless of the event taking place

ECONOMIC IMPACT SUMMARY

SPECIFICATION #110845 FINAL SUMMARY REPORT

ECONOMIC IMPACT ANALYSIS OVERVIEW

Hosting summer festivals and other arts & cultural events can provide significant benefits to a destination. Typically, and for the purposes of this summary, quantifiable effects are characterized in terms of economic impacts and fiscal impacts.

Economic Impacts

Economic impacts are conveyed through measures of direct spending, total output, personal earnings and employment – each of these measures is defined below.

Direct Spending – represents local spending generated by the event and includes lodging, food and beverage, entertainment, retail, transportation and other miscellaneous spending which occurs within Chicago *due** to the event.

Total Output – represents the total direct, indirect and induced spending effects generated by the event. Total output is a function of direct spending and market-specific multipliers.

Personal Earnings – represent the wages and salaries earned by employees of businesses impacted by the event.

Employment – is expressed in terms of full- and part-time positions supported by the event.

**Spending that is likely to have occurred in Chicago regardless of the surveyed events is defined as displaced spending. For purposes of this economic impact analysis, only non-displaced 'new' spending which can be directly attributed to the surveyed event is considered.*

SPECIFICATION #110845 FINAL SUMMARY REPORT

ECONOMIC IMPACT ANALYSIS OVERVIEW



Multiplier Effects

Quantifying the total economic impact (total output) associated with events requires accounting for not only the original direct spending in the market generated by the event but also the re-spending of these dollars throughout the local economy. The total impact is estimated by applying an economic multiplier to initial direct spending to account for the total economic impact. The total output multiplier is used to estimate the aggregate total spending that takes place beginning with the direct spending and continuing through each successive round of re-spending. Economic multipliers are specific to each market. The multiplier estimates used in this analysis are based on the IMPLAN system, which is currently used by hundreds of universities and government entities throughout the country. For purposes of this analysis, multipliers specific to Cook County have been utilized.

Fiscal Impacts

In addition to the economic impacts generated throughout the area by the event, the public sector also benefits from increased tax revenues. In preparing estimates of fiscal impacts, total tax revenues attributable to the direct spending generated by the event were estimated. The sources of tax revenue focused on in this analysis are as follows:

- Sales tax – assessed at a total rate of 9.25% (1.25% going to the City)
- Hotel tax – assessed at a total rate of 16.4% (5.6% going to the City)
- Restaurant tax – assessed at a total rate of 1.25% (0.25% going to the City)

Additional City taxes may apply, but have not been quantified in this analysis.

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METHODOLOGY AND RESULTS

Surveys were specifically designed to capture the required data necessary to perform a summary economic impact analysis. The survey questions were used to determine the respondent's residential status, reason for visiting Chicago, length of stay, size of party, localized spending in specific categories and other related information. Specific assumptions made to reduce overstating of results include:

- Spending by local residents was completely disqualified from the analysis as this is largely displaced spending and thus does not represent new money to the economy.
- Similarly, spending by non-local residents that indicated that a surveyed event was NOT their primary reason for visiting Chicago was also entirely disqualified.
- Spending occurring at the event has not been included in the analysis. Once the City receives final event spending and tax collections data, it can be incorporated into the project findings.

NOTE: The number of collected surveys at each event ranged from a low of approximately 100 surveys at ongoing Millennium Park (and other venue) events to a high of more than 300 surveys at several large-scale events such as Chicago Blues Festival, Taste of Chicago and Chicago Air & Water Show. For economic impact calculations to be statistically valid (with a high degree of confidence) generally 300 to 400 collected surveys is necessary per event. As such, for several of the events surveyed, the economic impact calculations are based upon a limited survey sample size. Therefore, the economic impact outputs for these events should be viewed as anecdotal calculations rather than as definitive results based on a thorough and complete economic impact analysis. For future considerations, CIS would recommend increasing the targeted sample size for events with material economic impact implications.

Based on the data collected, key statistics of the cumulative survey population include:

- Approximately 44 percent of event attendees were from outside of Chicago.
- Of these non-local residents, approximately 40 percent stayed in Chicago overnight.
- Approximately 57 percent of non-local respondents indicated that surveyed event was their primary reason for visiting Chicago.

SPECIFICATION #110845 FINAL SUMMARY REPORT

METHODOLOGY AND RESULTS



The economic and fiscal impacts attributable to the surveyed City Festivals based on the assumptions outlined herein are summarized below:

Spending Category	Blues Festival	Gospel Music Festival	Downtown Sound	Loops & Variations	Taste of Chicago	Air & Water	MIC: World Class Jazz	Jazz Festival	World Music Festival	Summer Dance	Cultural Center	Maxwell St. Market	MEDIAN	TOTAL
Attendance Estimate	500,000	30,000	102,500	30,000	1,500,000	1,700,000	62,000	100,000	30,000	65,000	825,000	100,000	100,000	5,044,500
Non-Chicago Residents	51%	31%	34%	38%	59%	35%	36%	56%	42%	34%	49%	26%	37%	44%
Event primary reason for visit	65%	88%	47%	15%	74%	68%	25%	56%	46%	33%	20%	66%	52%	57%
New Direct Spending	\$26,416.0	\$661.0	\$653.0	\$466.0	\$66,239.0	\$48,740.0	\$370.0	\$6,075.0	\$521.0	\$73.0	\$8,412.0	\$805.0	\$733.0	\$159,431.0
Total Output	\$42,563.0	\$1,068.0	\$1,048.0	\$750.0	\$106,345.0	\$78,380.0	\$592.0	\$9,766.0	\$841.0	\$118.0	\$13,556.0	\$1,302.0	\$1,185.0	\$256,329.0
Total Employment	430	11	12	8	1,122	831	7	98	9	1	137	16	14	2,682
Total Earnings	\$15,645.0	\$394.0	\$384.0	\$278.0	\$39,530.0	\$29,226.0	\$222.0	\$3,615.0	\$313.0	\$42.0	\$5,010.0	\$488.0	\$441.0	\$95,147.0
Annual City Tax Revenue	\$1,058.3	\$24.2	\$16.5	\$18.4	\$2,350.2	\$1,799.3	\$11.8	\$250.3	\$15.2	\$1.1	\$347.9	\$19.0	\$21.6	\$5,912.2
Annual County Tax Revenue	\$383.1	\$9.0	\$5.1	\$3.7	\$522.3	\$384.6	\$2.9	\$47.9	\$4.1	\$0.6	\$66.4	\$6.4	\$7.7	\$1,436.1
Annual State Tax Revenue	\$2,511.2	\$60.4	\$51.1	\$44.0	\$5,961.6	\$4,466.4	\$31.7	\$585.7	\$43.1	\$4.8	\$811.7	\$61.6	\$61.0	\$14,633.3

Note: Values in the chart do not include spending occurring at the event

As shown above, based on the survey data collected, cumulative new direct spending occurring in Chicago attributable to the 12 surveyed events is estimated at approximately \$159 million. Total output, which takes into consideration all direct, indirect and induced spending, is estimated at approximately \$256 million. An estimate of full- and part-time jobs supported by the increased economic activity generated by the Festivals is approximately 2,682. Total earnings, which represents wages and salaries earned by employees of businesses associated with or impacted by the Festivals is estimated at approximately \$95 million. Total fiscal impacts, representing the value of taxes collected by the City of Chicago due to economic activity generated by the surveyed events is estimated at approximately \$6 million.