



# The Economic Impact of Cultural Tourism in Palm Beach County

## Results from the FY 19 Attendee Surveys and Spending Data

The Cultural Tourism Development Fund provides two grant programs that are funded by revenues from Palm Beach County's bed tax: Category B (grants to nonprofit organizations with an annual operating budget of more than \$1.175M) and Category C-II (grants to nonprofit organizations with an annual operating budget of \$200,000 to \$1.175M). The grants support the tourist development efforts of these cultural institutions. The Cultural Tourism Development Fund awarded a total of \$4,640,000 to 36 of Palm Beach County's cultural organizations during FY 2019 (2018-2019): 22 category B organizations received a total of \$4,130,000, and 14 category C-II organizations received a total of \$510,000.

The Cultural Council for Palm Beach County administers this biennial grant program under contract with the Tourist Development Council and the Board of County Commissioners. The program requires grantees to collect standardized data during the grant period through the use of audience-intercept surveys. During the FY 2019 grant period, the 36 participating grantees collected a total of 15,866 valid surveys from attendees to their performances, events, and destinations. Research objectives for this project are to report the survey results, to inform future cultural tourism marketing efforts, and to evaluate the economic impact of cultural tourism in the county. This project is a joint effort between Surale Phillips and Americans for the Arts. The consultant designed the survey with input from the Cultural Council, Discover the Palm Beaches, Americans for the Arts, and the grantee organizations. The rigorous methodology aligns with other local and national research conducted by Americans for the Arts.

**This customized report provides the unique research findings for:**  
**The Cultural Tourism Development Fund**

Aggregate Self-Reported Attendance: 4,100,845    Aggregate Self-Reported Operating Budgets: \$189,422,044    Aggregate Valid Sample Size: 15,866

The Cultural Tourism Development Fund's grantees gathered an overall sample of 16,576 audience-intercept surveys. After a thorough review of the data (including the identification and removal of any invalid and outlier surveys), a total of 15,866 valid surveys are included in this final analysis. Survey respondents provided information about the dollars they spent in Palm Beach County as a direct result of attending the performance, event, or exhibit where they were surveyed (on purchases in categories such as meals, souvenirs, transportation, and lodging). In addition, visitors from outside Palm Beach County also provided information about their entire trip expenditure while visiting Palm Beach County, as well as the primary reason for their trip. Demographic and marketing data were also collected.

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## KEY FINDINGS FOR THE CULTURAL TOURISM DEVELOPMENT FUND

### ALL ATTENDEES to the Cultural Tourism Development Fund Grantees

- 30.8% of survey respondents are non-residents of Palm Beach County.
  - 12.4% traveled to Palm Beach County specifically to attend the Cultural Tourism Development Fund's grantees.
- 37.3% of survey respondents are first-time attendees to the Cultural Tourism Development Fund grantee where they were surveyed.
- Overall, survey respondents awarded a satisfaction rating of 4.77 to the Cultural Tourism Development Fund grantee where they were surveyed (on a scale of 1-5 where 5 is very satisfied and 1 is very dissatisfied).

### CULTURAL TOURISTS (non-residents visiting Palm Beach County SPECIFICALLY to experience the County's arts and cultural opportunities)

- 52.8% report that this was their first ever visit to Palm Beach County.
- 83.2% made the decision to attend the grantee where they were surveyed before arriving in Palm Beach County.
- 64.1% report that cultural opportunities were a significant factor in their decision to visit Palm Beach County.
- 58.2% report that they only visited one cultural destination during their entire visit to Palm Beach County (i.e., the event where they were surveyed)
- 88.4% anticipate that they will visit Palm Beach County again in the future.
  - 81.3% anticipate that they will return to the grantee where they were surveyed in the future.
- 67.2% only spent one day in Palm Beach County (i.e., daytrippers).
  - 32.8% spent at least one night in Palm Beach County (i.e., overnights), and they spent an average of 11.3 nights.
  - 61.1% of overnights utilized paid lodging in Palm Beach County (i.e, hotel, motel, resort, vacation rental, Airbnb).

### ECONOMIC IMPACT FINDINGS for the Cultural Tourism Development Fund's Grantees

- The Cultural Tourism Development Fund's grantees generated a estimated \$589,138,628 in total culture-related spending in Palm Beach County during FY 2018-19. These dollars include all event-related spending (\$326,658,182), any additional spending in Palm Beach County by nonresidents who traveled specifically to experience Palm Beach County's arts and cultural opportunities (\$118,814,084), and the aggregate budgets of the grantees themselves excluding admissions-related revenues (\$143,666,362).
- This total culture-related spending attributed to the Cultural Tourism Development Fund's grantees supported 13,434 full-time equivalent jobs, generated \$280,726,000 in household income to Palm Beach County residents, and generated \$55,117,000 in revenue to local and state governments (e.g., taxes, licenses, permits).
- Cultural tourists utilized an estimated total of 316,151 roomnights in paid lodging in Palm Beach County during their trip, spending a estimated total of \$67,775,172 on paid lodging.

## GLOSSARY AND RESEARCH NOTES

CULTURAL TOURISTS who attended the Cultural Tourism Development Fund's grantees are defined as any non-residents of Palm Beach County who were surveyed while visiting one of the grantees and who also reported that (1) their primary reason for visiting Palm Beach County was specifically to attend the grantee organization where they were surveyed, and/or (2) their primary reason for visiting Palm Beach County was specifically to experience Palm Beach County arts/culture, and/or (3) Palm Beach County's arts and cultural opportunities were a significant factor in their decision to visit Palm Beach County.

OTHER VISITORS to the Cultural Tourism Development Fund's grantees are defined as all other non-residents of Palm Beach County who were surveyed while visiting one of the grantee organizations. An example would include a family that traveled to Palm Beach County specifically to spend a long weekend at the beach, but visited one of the grantee organizations on a rainy day.

The ECONOMIC IMPACT findings on Tables 26 (Page 12) and 28 (Page 13) were calculated using an input-output economic model that was customized specifically for the economy of Palm Beach County. Input-output analysis 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. To complete this analysis, 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 using data on employment, incomes, and government revenues provided by the U.S. Department of Commerce (e.g., County Business Patterns, the Regional Economic Information System, and the Survey of State and Local Finance), state and local tax data (e.g., sales, property, corporate, fuel, personal income, and lodging taxes, as well as other miscellaneous local and state taxes), the operating budget and attendance information provided by the Cultural Tourism Development Fund's grantees to the Cultural Council for Palm Beach County, and the audience-intercept survey data collected from its attendees.

A NOTE on the aggregate findings: To complete the data analysis, first the results were calculated separately for each of the 25 grantees that provided a sufficient sample (including the 22 Category B grantees and three Category C-II grantees). Next, the Category C-II averages were applied to the 11 remaining C-II grantees. Finally, the results for all 36 grantees were summed. Percentages, averages, and medians reported in this document are based on a unique analysis of the entire sample of 15,866 valid surveys collected from all 36 grantees. However, as a result of this most specific and accurate methodology, any aggregate findings reported in these tables such as total estimated resident/nonresident attendance, total estimated spending, and total estimated economic impact likely will not equal the overall averages multiplied by the overall totals.

## RESIDENCY STATUS AND TRIP CHARACTERISTICS OF ATTENDEES

**TABLE 1: Distribution of the Audience Survey Sample by Visitors to and Residents of Palm Beach County**

	NUMBER OF VALID SURVEYS COLLECTED	PERCENTAGE OF SUB GROUP*	PERCENTAGE OF ALL ATTENDEES*	ESTIMATED TOTAL ATTENDEES**
Full-time residents	9,259	84.3%	58.4%	2,450,913
Part-time residents	1,724	15.7%	10.9%	402,797
<b>ALL RESIDENTS</b>	<b>10,983</b>	<b>100%</b>	<b>69.2%</b>	<b>2,853,710</b>
<b>Cultural tourists</b>	<b>2,582</b>	<b>52.9%</b>	<b>16.3%</b>	<b>623,596</b>
Other visitors	2,301	47.1%	14.5%	623,539
<b>ALL NON-RESIDENTS</b>	<b>4,883</b>	<b>100%</b>	<b>30.8%</b>	<b>1,247,135</b>
<b>ALL ATTENDEES</b>	<b>15,866</b>	n/a	<b>100%</b>	<b>4,100,845</b>

\* Percentages may not add exactly to 100 percent due to rounding.

\*\* To calculate the estimated aggregate totals for the entire Cultural Tourism Development Fund, first the results are calculated for each of 25 grantees that collected a sufficient sample for a customized individual analysis; next, the Category C-II averages are applied to the 11 remaining C-II grantees; finally, the results are summed.

**TABLE 2: Average Party Size Reported by Attendees to the Cultural Tourism Development Fund's Grantees**

	FULL-TIME RESIDENTS	PART-TIME RESIDENTS	ALL RESIDENTS	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS	ALL ATTENDEES
Adults	2.35	2.57	<b>2.38</b>	2.41	2.52	<b>2.46</b>	<b>2.41</b>
Children (<18)	0.37	0.10	<b>0.33</b>	0.35	0.38	<b>0.37</b>	<b>0.34</b>
<b>AVERAGE PARTY SIZE</b>	<b>2.72</b>	<b>2.67</b>	<b>2.71</b>	<b>2.76</b>	<b>2.90</b>	<b>2.83</b>	<b>2.75</b>

\* Itemized figures may not add exactly to the total due to rounding.

**TABLE 3: Percentage of First-Time Attendees to the Cultural Tourism Development Fund's Grantees**

	FULL-TIME RESIDENTS	PART-TIME RESIDENTS	ALL RESIDENTS	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS	ALL ATTENDEES
First-time attendees	27.5%	21.6%	<b>26.6%</b>	52.8%	71.0%	<b>61.4%</b>	<b>37.3%</b>
Repeat attendees	72.5%	78.4%	<b>73.4%</b>	47.2%	29.0%	<b>38.6%</b>	<b>62.7%</b>

\* Percentages may not add exactly to 100 percent due to rounding.

**SOURCES OF INFORMATION USED TO LEARN ABOUT CULTURAL OPPORTUNITIES**

**TABLE 4: Websites Used to Find Cultural Opportunities in Palm Beach County**

	FULL-TIME RESIDENTS	PART-TIME RESIDENTS	ALL RESIDENTS	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS	ALL ATTENDEES
The grantees' website(s)	55.6%	57.4%	55.9%	55.9%	42.3%	49.5%	53.9%
Palmbeachculture.com	12.2%	10.5%	11.9%	7.0%	5.9%	6.5%	10.2%
ThePalmBeaches.com	14.5%	14.3%	14.4%	8.8%	8.0%	8.4%	12.6%
SouthFlorida.com	8.9%	5.6%	8.4%	7.4%	4.3%	6.0%	7.6%
TripAdvisor.com	13.5%	14.3%	13.6%	17.1%	26.2%	21.4%	16.0%
VisitFlorida.com	5.1%	5.2%	5.1%	6.2%	8.3%	7.2%	5.7%
Yelp.com	8.5%	6.4%	8.2%	8.8%	8.7%	8.8%	8.4%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

\* Percentages may add to more than (or less than) 100 percent; answers not required, and multiple responses allowed.

**TABLE 5: Social Media Platforms Used to Find Cultural Opportunities in Palm Beach County**

	FULL-TIME RESIDENTS	PART-TIME RESIDENTS	ALL RESIDENTS	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS	ALL ATTENDEES
Facebook	48.8%	29.8%	45.8%	44.7%	35.8%	40.5%	44.2%
Instagram	18.5%	10.6%	17.3%	21.6%	14.3%	18.1%	17.5%
Twitter	5.9%	2.5%	5.4%	5.1%	3.4%	4.3%	5.0%
Snapchat	3.4%	1.2%	3.0%	3.4%	2.3%	2.9%	3.0%
Flickr	0.4%	0.3%	0.4%	0.9%	0.6%	0.7%	0.5%
LinkedIn	3.0%	1.1%	2.7%	1.6%	1.4%	1.5%	2.3%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

\* Percentages may add to more than (or less than) 100 percent; answers not required, and multiple responses allowed.

**TABLE 6: Additional Methods Used to Find Cultural Opportunities in Palm Beach County**

	FULL-TIME RESIDENTS	PART-TIME RESIDENTS	ALL RESIDENTS	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS	ALL ATTENDEES
Brochure	28.5%	37.7%	29.9%	21.7%	23.6%	22.6%	27.7%
Sign/banner	10.9%	10.2%	10.7%	7.7%	7.3%	7.6%	9.8%
Printed mailer	17.6%	23.3%	18.5%	8.8%	5.2%	7.1%	15.0%
Online ad	17.0%	12.1%	16.2%	14.3%	9.0%	11.8%	14.9%
Newspaper	29.9%	42.9%	32.0%	16.8%	12.6%	14.8%	26.7%
Google	25.4%	23.3%	25.0%	31.1%	30.3%	30.7%	26.8%
Magazine	11.1%	14.6%	11.7%	7.7%	7.7%	7.7%	10.5%
Bing	0.8%	0.6%	0.7%	0.6%	0.4%	0.5%	0.7%
Radio/Pandora	10.6%	6.7%	10.0%	6.9%	2.3%	4.8%	8.4%
Word of Mouth	42.0%	43.7%	42.3%	35.1%	39.2%	37.0%	40.7%
TV	11.1%	13.7%	11.5%	8.0%	4.7%	6.4%	10.0%
Hotel	0.5%	0.8%	0.5%	2.4%	6.7%	4.4%	1.7%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

\* Percentages may add to more than (or less than) 100 percent; answers not required, and multiple responses allowed.

## ATTENDEE SATISFACTION

**TABLE 7: Attendee Satisfaction by Residency Status**

	FULL-TIME RESIDENTS	PART-TIME RESIDENTS	ALL RESIDENTS	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS	ALL ATTENDEES
<b>Satisfaction with the GRANTEE ORGANIZATION where surveyed (rating scale from 1 to 5 where 5 = Very Satisfied and 1 = Very Dissatisfied)</b>							
Very satisfied	82.3%	82.5%	82.4%	83.2%	80.6%	82.0%	82.2%
Somewhat satisfied	13.8%	13.3%	13.7%	12.4%	15.9%	14.1%	13.8%
Neutral	2.7%	3.0%	2.7%	2.5%	2.7%	2.6%	2.7%
Somewhat dissatisfied	0.4%	0.4%	0.4%	0.7%	0.3%	0.5%	0.4%
Very dissatisfied	0.5%	0.5%	0.5%	0.9%	0.5%	0.7%	0.6%
Average Rating (1-5)	4.77	4.77	4.77	4.76	4.76	4.76	4.77
<b>Satisfaction with OVERALL CULTURAL ACTIVITIES in PBC (rating scale from 1 to 5 where 5 = Very Satisfied and 1 = Very Dissatisfied)</b>							
Very satisfied	59.4%	60.9%	59.6%	55.8%	52.8%	54.4%	58.0%
Somewhat satisfied	23.8%	22.7%	23.6%	17.9%	21.9%	19.8%	22.4%
Neutral	8.9%	7.9%	8.7%	8.2%	9.2%	8.7%	8.7%
Somewhat dissatisfied	0.9%	0.8%	0.9%	0.4%	0.7%	0.6%	0.8%
Very dissatisfied	0.5%	0.5%	0.5%	0.4%	0.3%	0.4%	0.4%
Don't know/not applicable	6.6%	7.3%	6.7%	17.4%	15.1%	16.3%	9.7%
Average Rating (1-5)	4.51	4.54	4.51	4.55	4.48	4.52	4.51

\* Percentages may not add exactly to 100 percent due to rounding.

**TABLE 8: Attendee Satisfaction by First-Time Visitors vs. Repeat Customers**

	FIRST-TIME VISITORS	REPEAT VISITORS	ALL ATTENDEES
<b>Satisfaction with the GRANTEE ORGANIZATION where surveyed (rating scale from 1 to 5 where 5 = Very Satisfied and 1 = Very Dissatisfied)</b>			
Very satisfied	79.9%	83.6%	82.2%
Somewhat satisfied	15.6%	12.8%	13.8%
Neutral	3.4%	2.2%	2.7%
Somewhat dissatisfied	0.4%	0.5%	0.4%
Very dissatisfied	0.5%	0.6%	0.6%
Average Rating (scale from 1 to 5)	4.74	4.78	4.77
<b>Satisfaction with OVERALL CULTURAL ACTIVITIES in PBC (rating scale from 1 to 5 where 5 = Very Satisfied and 1 = Very Dissatisfied)</b>			
Very satisfied	55.4%	59.7%	58.0%
Somewhat satisfied	20.0%	23.9%	22.4%
Neutral	9.1%	8.4%	8.7%
Somewhat dissatisfied	0.9%	0.7%	0.8%
Very dissatisfied	0.4%	0.5%	0.4%
Don't know/not applicable	14.2%	6.8%	9.7%
Average Rating (scale from 1 to 5)	4.51	4.52	4.51

\* Percentages may not add exactly to 100 percent due to rounding.

**TRIP CHARACTERISTICS FOR NON-RESIDENTS WHO TRAVELED TO PALM BEACH COUNTY (*non-residents only*)**

**TABLE 9: Number of Times the Survey Respondents Have Visited Palm Beach County\***

	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS
This is my first visit	19.3%	31.8%	25.2%
I have visited 1-2 times previously	14.4%	19.9%	17.0%
I have visited 3 or more times previously	66.4%	48.3%	57.8%

\* Percentages may not add exactly to 100 percent due to rounding.

**TABLE 10: Mode of Transportation Used by Survey Respondents to Travel to Palm Beach County\***

	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS
Car	80.4%	52.0%	67.0%
Bus	1.3%	0.3%	0.0%
Boat	0.4%	0.5%	0.4%
Plane	19.7%	53.1%	35.4%
Train	1.5%	1.7%	1.6%
Other	0.6%	1.2%	0.9%

\* Percentages may add to more than 100 percent; multiple responses allowed.

**TABLE 11: Timing of the Decision to Visit/Attend the Grantee Organization Where Surveyed\***

	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS
Before arriving in Palm Beach County	83.2%	35.1%	60.4%
After arriving in Palm Beach County	16.8%	64.9%	39.6%

\* Percentages may not add exactly to 100 percent due to rounding.

**TABLE 12: Degree With Which Cultural Opportunities Factored into the Decision to Visit Palm Beach County\***

	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS
A significant factor	64.1%	0.0%	33.9%
A contributing factor	18.0%	45.0%	30.7%
Not a factor at all**	13.5%	54.2%	32.7%

\* Percentages may not add exactly to 100 percent due to rounding.

\*\* In all situations where a survey respondent declined to answer this question, the answer was hard-coded by the project researchers as "Not a factor at all." Doing so allowed these responses to remain in the data analysis while taking a conservative approach to calculating the impact of cultural tourists.

**TRIP CHARACTERISTICS FOR NON-RESIDENTS WHO TRAVELED TO PALM BEACH COUNTY (continued)**

**TABLE 13: Primary Reason for Trip to Palm Beach County by the Survey Respondents\***

	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS
Specifically to attend the cultural activity/site where surveyed	76.2%	0.0%	40.3%
Specifically to experience PBC arts/culture	6.0%	0.0%	3.2%
Vacation/holiday	9.6%	41.7%	24.8%
Visit family/friends	5.1%	39.7%	21.4%
Conduct business	0.7%	3.6%	2.1%
Attend conference or convention	0.3%	2.7%	1.5%
Sports and/or recreation	0.3%	2.6%	1.4%
Different reason**	1.7%	9.7%	5.5%

\* Percentages may not add exactly to 100 percent due to rounding.

\*\* In all situations where a survey respondent declined to answer this question, the answer was hard-coded by the project researchers as "Different reason." Doing so allowed these responses to remain in the data analysis while taking a conservative approach to calculating the impact of cultural tourists.

**TABLE 14: Total Number of Arts and Cultural Destinations Visited/Attended During Trip to Palm Beach County\***

	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS
1 (i.e., only the grantee organization where they were surveyed)	58.2%	36.9%	48.2%
2-3 arts/cultural destinations	24.3%	36.0%	29.8%
4-6 arts/cultural destinations	13.3%	21.9%	17.4%
7-10 arts/cultural destinations	2.1%	2.2%	2.2%
More than 10 arts/cultural destinations	2.1%	2.9%	2.5%
<b>Average</b>	<b>2.23</b>	<b>2.91</b>	<b>2.55</b>
<b>Median</b>	<b>1.0</b>	<b>2.0</b>	<b>2.0</b>

\* Percentages may not add exactly to 100 percent due to rounding.

**TABLE 15: Likelihood of Survey Respondents Visiting Palm Beach County Again in the Future\***

	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS
<b>Do you anticipate visiting the grantee organization where you were surveyed again in the future?</b>			
Yes	81.3%	62.0%	72.2%
Maybe	16.0%	31.4%	23.3%
No	2.7%	6.6%	4.5%
<b>Do you anticipate visiting Palm Beach County again in the future?</b>			
Yes	88.4%	79.5%	84.2%
Maybe	10.3%	18.6%	14.2%
No	1.3%	1.8%	1.6%

\* Percentages may not add exactly to 100 percent due to rounding.

**TRIP CHARACTERISTICS FOR NON-RESIDENTS WHO TRAVELED TO PALM BEACH COUNTY (continued)**

**TABLE 16: Total Number of DAYS Spent in Palm Beach County by Non-Resident Survey Respondents\***

	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS
1 day	61.1%	16.3%	40.1%
2-3 days	14.3%	18.1%	16.1%
4-5 days	8.3%	22.3%	14.9%
6-7 days	6.3%	15.8%	10.8%
8-14 days	4.5%	13.4%	8.7%
More than 14 days	5.4%	14.0%	9.5%
<b>Average</b>	<b>5.21</b>	<b>11.39</b>	<b>8.11</b>
<b>Median</b>	<b>1.0</b>	<b>5.0</b>	<b>3.0</b>

\* Percentages may not add exactly to 100 percent due to rounding.

**USAGE OF OVERNIGHT LODGING BY NON-RESIDENTS WHO TRAVELED TO PALM BEACH COUNTY**

**TABLE 17: Total Number of NIGHTS Spent in Palm Beach County by Non-Resident Survey Respondents\*/\*\***

	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS
<b>0 nights</b> (i.e., "Daytrippers")	67.2%	25.5%	47.6%
Any nights	32.8%	74.5%	52.4%
1 night	4.3%	2.9%	3.6%
2-3 nights	8.3%	16.7%	12.2%
4-5 nights	6.8%	18.4%	12.3%
6-7 nights	5.0%	13.6%	9.1%
8-14 nights	3.9%	11.3%	7.4%
More than 14 nights***	4.4%	11.6%	7.8%
Average (all visitors)	3.71	9.19	6.29
Average (excluding Daytrippers)	11.30	12.34	12.00
Median (excluding Daytrippers)	5.0	5.0	5.0

\* Percentages may not add exactly to 100 percent due to rounding.

\*\* The number of days spent in Palm Beach County by non-residents is not necessarily directly related to the number of nights spent in Palm Beach County by non-residents. As an example, consider a family that spends seven days on a trip to south Florida. They may choose to stay in overnight lodging that is located outside Palm Beach County while attending events/activities inside the County each day. Conversely, they may spend each night in lodging that is located inside Palm Beach County while choosing to spend several days of their trip in another nearby community (e.g., Miami).

\*\*\* In all cases where survey respondents reported that they are non-residents of Palm Beach County and also reported that they spent more than 90 nights in Palm Beach County during their trip, the project researchers hard-coded their residency status as part-time residents. The data demonstrated that these respondents may have misinterpreted the residency question. In addition, this cautious approach removed the possibility that the outlier trip length and outlier trip expenditures connected to these responses would skew the overall economic impact findings associated with cultural tourists.



**USAGE OF OVERNIGHT LODGING BY NON-RESIDENTS WHO TRAVELED TO PALM BEACH COUNTY (continued)**

**TABLE 18: Usage of Paid vs. Free Lodging by Non-Residents Who Stayed Overnight in Palm Beach County\***

	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS
<b>PAID Lodging</b> (e.g., hotel, motel, resort, vacation rental, Airbnb)			
Percentage of overnighters that used <u>paid</u> lodging**	61.1%	49.2%	<b>53.2%</b>
Average number of nights spent in <u>paid</u> lodging	8.25	11.90	<b>10.47</b>
Average number of rooms/units used per night in <u>paid</u> lodging	1.33	1.43	<b>1.39</b>
Average rate paid per room/unit, per night	\$211.72	\$209.02	<b>\$210.05</b>
<b>FREE Lodging</b> (e.g., at the home of family and/or friends)			
Percentage of overnighters that used <u>free</u> lodging**	44.2%	57.0%	<b>52.8%</b>
Average number of nights spent in <u>free</u> lodging	14.73	12.53	<b>13.13</b>

\* Percentages may add to more than 100 percent; multiple responses allowed.

\*\* In aggregate for this FY 2018-19 analysis (all participating organizations), six percent of the survey respondents reported that they utilized both paid lodging as well as free lodging during their visit to Palm Beach County. It's important to note that respondents may have self-defined "paid" and "free" lodging differently due to the ambiguity of interpretation; examples could include the use of hotel reward points as well as nights spent at timeshare properties.

**TABLE 19: Types of PAID Lodging Used by Non-Residents Who Stayed Overnight in Palm Beach County\***

	CULTURAL TOURISTS	ALL OTHER VISITORS	ALL NON-RESIDENTS
Hotel/motel	76.6%	66.2%	<b>70.2%</b>
Airbnb/ VRBO, HomeAway, etc.	15.9%	18.5%	<b>17.5%</b>
Campground/RV, etc.	0.6%	2.7%	<b>1.9%</b>
Other	7.4%	13.5%	<b>11.1%</b>

\* Percentages may not add exactly to 100 percent due to rounding.

**TABLE 20: Estimated Usage of PAID Lodging by Non-Residents Who Stayed Overnight in Palm Beach County**

	CULTURAL TOURISTS*	ALL OTHER VISITORS	ALL NON-RESIDENTS
Estimated total number of non-resident visitors*	623,596	623,539	<b>1,247,135</b>
Average cultural activities attended by paid overnighters (to eliminate double-counting)	2.0	2.2	<b>2.1</b>
Estimated number of unique paid overnighters who attended the grantees*	506,769	226,073	<b>732,842</b>
Percentage of visitors that stayed overnight in Palm Beach County	32.8%	74.5%	<b>52.4%</b>
Estimated number of overnight visitors/attendees*	179,078	158,857	<b>337,935</b>
Percentage of overnighiter attendees that stayed in paid lodging	61.1%	49.2%	<b>53.2%</b>
Estimated total number of overnighiter attendees that stayed in paid lodging*	113,310	77,968	<b>191,278</b>
Average party size of overnighters	2.76	2.90	<b>2.83</b>
Estimated total number of overnighiter travel parties*	43,785	26,010	<b>69,795</b>
Average number of rooms/units utilized per night per travel party	1.33	1.43	<b>1.39</b>
Total estimated number of rooms/units utilized in paid lodging*	54,970	37,748	<b>92,718</b>
Average number of nights spent in paid lodging	8.25	11.90	<b>10.47</b>
Total estimated number of roomnights utilized in paid lodging*	316,151	408,437	<b>724,588</b>
Average rate paid per room/unit, per night	\$211.72	\$209.02	<b>\$210.05</b>
Total estimated dollars spent on paid lodging*	\$67,775,172	\$82,282,202	<b>\$150,057,374</b>

\* To calculate the estimated aggregate totals for the entire Cultural Tourism Development Fund, first the results are calculated for each of 25 grantees that collected a sufficient sample for a customized individual analysis; next, the Category C-II averages are applied to the 11 remaining C-II grantees; finally, the results are summed.

**EVENT-RELATED SPENDING (audience spending that is a direct result of visiting/attending this organization)**

**TABLE 21: Total Event-Related Spending by RESIDENT Attendees to the Grantees**

	FULL-TIME RESIDENTS	PART-TIME RESIDENTS	ALL RESIDENTS
Percentage of Resident Attendees*	84.3%	15.7%	100%
Total Estimated Attendance**	2,450,913	402,797	2,853,710
Average Per-Person Event-Related Expenditure	\$69.53	\$108.48	\$75.64
Total Estimated Event-Related Spending**	\$156,020,275	\$37,088,899	\$193,109,174

\* Percentages may not add exactly to 100 percent due to rounding.

\*\* To calculate the estimated aggregate totals for the entire Cultural Tourism Development Fund, first the results are calculated for each of 25 grantees that collected a sufficient sample for a customized individual analysis; next, the Category C-II averages are applied to the 11 remaining C-II grantees; finally, the results are summed.

**TABLE 22: Total Event-Related Spending by NON-RESIDENT Attendees to the Grantees**

	CULTURAL TOURISTS*	ALL OTHER VISITORS	ALL NON-RESIDENTS
Percentage of Non-Resident Attendees*	52.9%	47.1%	100%
Total Estimated Attendance**	623,596	623,539	1,247,135
Average Per-Person Event-Related Expenditure	\$177.39	\$128.36	\$154.29
Total Estimated Event-Related Spending**	\$65,214,523	\$68,334,485	\$133,549,008

\* Percentages may not add exactly to 100 percent due to rounding.

\*\* To calculate the estimated aggregate totals for the entire Cultural Tourism Development Fund, first the results are calculated for each of 25 grantees that collected a sufficient sample for a customized individual analysis; next, the Category C-II averages are applied to the 11 remaining C-II grantees; finally, the results are summed.

**TABLE 23: Total Event-Related Spending by ALL ATTENDEES to the Grantees**

	ALL RESIDENTS	ALL NON-RESIDENTS	ALL ATTENDEES
Percentage of All Attendees*	69.2%	30.8%	100%
Total Estimated Attendance**	2,853,710	1,247,135	4,100,845
Average Per-Person Event-Related Expenditure	\$75.64	\$154.29	\$99.84
Total Estimated Event-Related Spending**	\$193,109,174	\$133,549,008	\$326,658,182

\* Percentages may not add exactly to 100 percent due to rounding.

\*\* To calculate the estimated aggregate totals for the entire Cultural Tourism Development Fund, first the results are calculated for each of 25 grantees that collected a sufficient sample for a customized individual analysis; next, the Category C-II averages are applied to the 11 remaining C-II grantees; finally, the results are summed.

**DIRECT SPENDING BY THE CATEGORY ALL ORGANIZATIONS**

**TABLE 24: Total Direct Spending by the Category ALL Grantee Organizations**

	OPERATING BUDGET
The aggregate operating budgets of the 1 Category ALL organizations' total operating budgets (FY 2018-19)	\$189,422,044
Revenue received from admissions-related sources (e.g., ticket sales, annual subscriptions/memberships)	-\$45,755,682
<b>Aggregate FY 2018-19 operating budgets of the Category ALL grantees (excluding admissions-related sources)*</b>	<b>\$143,666,362</b>

\* The FY 2018-19 budget figures were self-reported by the Category ALL grantees. Researchers subtracted the total revenue from admissions-related sources (if applicable) from the Category ALL grantees's total operating budget in order to avoid double-counting those dollars, since admissions expenditures were also collected on the audience-intercept surveys.

**TOTAL DOLLARS SPENT IN PALM BEACH COUNTY BY ATTENDEES TO THE GRANTEES**

**TABLE 25: Total Dollars Spent in Palm Beach County by Non-Resident Cultural Tourists**

	CULTURAL TOURISTS
<b>Estimated Total Dollars Spent in Palm Beach County by DAYTRIPPERS (during the entire visit)</b>	
Total non-resident attendance by cultural tourists to the grantees*	623,596
Average number of cultural sites/activities attended by all daytrippers (to exclude double-counting)	1.7
Estimated number of unique cultural tourists to the grantees*	576,502
Percentage of Daytrippers (i.e., non-residents who did <u>not</u> spend any nights in Palm Beach County)	67.2%
Estimated total attendance by daytrippers to the grantees*	368,245
Average party size of daytrip visitors	2.80
Estimated total number of unique daytripper travel parties*	128,074
Average amount of total expenditure made in Palm Beach County by daytrippers during their entire trip	\$329.06
<b>Total dollars spent in Palm Beach County by DAYTRIPPERS who visited the grantees*</b>	<b>\$39,619,626</b>
<b>Estimated Total Dollars Spent in Palm Beach County by OVERNIGHTERS (during the entire visit)</b>	
Total non-resident attendance by cultural tourists to the grantees*	623,596
Average number of cultural sites/activities attended by all overnighters (to exclude double-counting)	3.2
Estimated number of unique cultural tourists to the grantees*	505,436
Percentage of Overnighters (i.e., non-residents who <u>did</u> spend at least one night in Palm Beach County)	32.8%
Estimated total attendance by overnighters to the grantees*	179,664
Average party size of overnight visitors	2.90
Estimated total number of unique overnighters travel parties*	63,260
Average amount of total expenditure made in Palm Beach County by overnighters during their entire trip	\$2,263
<b>Total dollars spent in Palm Beach County by OVERNIGHTERS who visited the grantees*</b>	<b>\$144,408,981</b>
<b>Estimated TOTAL <u>Additional</u> Spending in Palm Beach County (i.e., total trip spending minus specific event-related spending)</b>	
Total dollars spent in Palm Beach County by DAYTRIPPERS who visited the grantees	\$39,619,626
Total dollars spent in Palm Beach County by OVERNIGHTERS who visited the grantees	\$144,408,981
<b>Total dollars spent in Palm Beach County by non-residents who visited the grantees</b>	<b>\$184,028,607</b>
Event-related spending by non-residents as a direct result of attending the grantees	-\$65,214,523
<b>Total additional spending in Palm Beach County by attendees to the grantees**</b>	<b>\$118,814,084</b>

\* To calculate the estimated aggregate totals for the entire Cultural Tourism Development Fund, first the results are calculated for each of 25 grantees that collected a sufficient sample for a customized individual analysis; next, the Category C-II averages are applied to the 11 remaining C-II grantees; finally, the results are summed.

\*\* These dollars represent an estimate of all additional expenditures made in Palm Beach County by cultural tourists who attended a grantee organization, beyond the dollars that were spent as a direct result of attending that event (i.e., these dollars exclude event-related spending). They may include non-arts and non-cultural expenditures; since cultural tourists are defined as non-resident visitors who chose Palm Beach County as their destination specifically because of the County's arts and cultural opportunities, researchers assume that ALL of the local expenditures made during the entirety of their visit to Palm Beach County are directly attributable to the County's cultural industry.

**TOTAL ECONOMIC IMPACT OF THE CATEGORY ALL GRANTEES AND THEIR ATTENDEES**

**TABLE 26: Total Economic Activity and Economic Impacts Generated by Grantee Organizations and Their Attendees**

	TOTAL ECONOMIC IMPACT
<b>Economic Activity Generated by the Grantee Organizations and Their Attendees</b>	
Event-related spending by <u>full</u> -time residents of Palm Beach County*	\$156,020,275
Event-related spending by <u>part</u> -time residents of Palm Beach County*	\$37,088,899
Event-related spending by cultural tourists	\$65,214,523
Event-related spending by other visitors*	\$68,334,485
<b>Total event-related spending as a direct result of attending the grantees</b>	<b>\$326,658,182</b>
Additional spending in Palm Beach County by non-resident attendees	\$118,814,084
<b>Total culture-related dollars spent in Palm Beach County by attendees to all grantees</b>	<b>\$445,472,266</b>
Aggregate FY 2018-19 operating budgets of the grantee organizations (excluding admissions-related sources)*	\$143,666,362
<b>Total Economic Activity Generated by the Grantee Organizations and Their Attendees</b>	<b>\$589,138,628</b>
<b>Economic Impacts of the Direct Economic Activity Generated by the Grantee Organizations and Their Attendees</b>	
Direct economic activity generated	\$589,138,628
Full-time equivalent (FTE) jobs supported	13,434
Resident household income generated	\$280,726,000
Local government revenue generated	\$25,527,000
State government revenue generated	\$29,590,000
<b>Lodging Impacts of the Spending Generated by Cultural Tourists who Attended the Grantee Organizations</b>	
Total estimated roomnights spent in paid lodging by cultural tourists	316,151
Total estimated dollars spent on paid lodging by cultural tourists	\$67,775,172
Percentage of the 6,193,081 total available roomnights in Palm Beach County during FY 2018-19	5.1049%

**ATTRACTING NEW DOLLARS AND RETAINING LOCAL DOLLARS**

**TABLE 27: Attracting New Dollars and Retaining Local Dollars**

If today's performance, event, or exhibit at the Cultural Tourism Development Fund's grantee organizations were not happening, I would have ...	FULL-TIME RESIDENTS	PART-TIME RESIDENTS	ALL RESIDENTS	CULTURAL TOURISTS	OTHER VISITORS	ALL NON-RESIDENTS	ALL ATTENDEES
SKIPPED today's cultural experience altogether	35.8%	37.4%	<b>36.0%</b>	31.2%	31.1%	<b>31.2%</b>	<b>34.5%</b>
REPLACED it with another cultural experience located in Palm Beach County	23.7%	24.4%	<b>23.8%</b>	14.4%	34.9%	<b>24.1%</b>	<b>23.9%</b>
TRAVELED to another community (i.e., not Palm Beach County) in order to replace it with a similar cultural experience	35.5%	36.5%	<b>35.6%</b>	<b>49.3%</b>	<b>32.8%</b>	<b>41.5%</b>	<b>37.4%</b>

\* Percentages may not add exactly to 100 percent due to rounding.

**TABLE 28: Potential Lost Economic Activity and Impacts (based on the bottom row of Table 27 above)**

	FULL-TIME RESIDENTS	PART-TIME RESIDENTS	ALL RESIDENTS	CULTURAL TOURISTS	OTHER VISITORS	ALL NON-RESIDENTS	ALL ATTENDEES
Direct economic activity	-\$55,337,572	-\$13,553,368	<b>-\$68,890,940</b>	-\$90,660,104	-\$22,421,789	<b>-\$113,081,893</b>	<b>-\$181,972,833</b>
Full-time equivalent jobs	-1,212	-297	<b>-1,509</b>	-1,985	-491	<b>-2,476</b>	<b>-3,985</b>
Resident income	-\$23,100,000	-\$5,658,000	<b>-\$28,758,000</b>	-\$37,845,000	-\$9,360,000	<b>-\$47,205,000</b>	<b>-\$75,963,000</b>
Local government revenue	-\$2,287,000	-\$560,000	<b>-\$2,847,000</b>	-\$3,746,000	-\$926,000	<b>-\$4,672,000</b>	<b>-\$7,519,000</b>
State government revenue	-\$2,694,000	-\$660,000	<b>-\$3,354,000</b>	-\$4,413,000	-\$1,091,000	<b>-\$5,504,000</b>	<b>-\$8,858,000</b>

**DEMOGRAPHIC CHARACTERISTICS OF ATTENDEES TO THE GRANTEE ORGANIZATIONS**

**TABLE 29: GENDER IDENTITY of the Survey Respondents\***

	RESIDENTS	NON-RESIDENTS	ALL ATTENDEES
Male	31.2%	35.9%	32.6%
Female	67.9%	62.8%	66.3%
I prefer to self-identify	0.9%	1.4%	1.1%

\* Percentages may not add exactly to 100 percent due to rounding.

**TABLE 30: RACE/ETHNICITY of the Survey Respondents\***

	RESIDENTS	NON-RESIDENTS	ALL ATTENDEES
White/Caucasian ( <i>exclusive</i> )	79.9%	78.2%	79.4%
People of Color	20.1%	21.8%	20.6%
American Indian/Alaska Native	0.5%	0.6%	0.5%
Asian/Asian American	1.8%	2.3%	1.9%
Black/African American	6.7%	6.4%	6.6%
Hawaiian/Pacific Islander	0.4%	0.4%	0.4%
Hispanic/Latino	7.6%	8.1%	7.8%
Other	1.7%	2.2%	1.8%
Multi-Racial	2.2%	2.6%	2.3%

\* Percentages may add to more than 100 percent; multiple responses allowed.

**TABLE 31: AGE of the Survey Respondents\***

	RESIDENTS	NON-RESIDENTS	ALL ATTENDEES
Younger than 18	1.5%	1.3%	1.4%
18 to 24	5.3%	7.2%	5.9%
25 to 34	9.2%	11.6%	9.9%
35 to 44	11.2%	13.2%	11.8%
45 to 54	11.4%	14.3%	12.3%
55 to 64	15.3%	19.3%	16.5%
65 to 74	26.9%	23.4%	25.8%
75 or Older	19.2%	9.8%	16.3%

\* Percentages may not add exactly to 100 percent due to rounding.

**TABLE 32: ANNUAL HOUSEHOLD INCOME of the Survey Respondents\***

	RESIDENTS	NON-RESIDENTS	ALL ATTENDEES
Less than \$40,000	12.0%	11.9%	12.0%
\$40,000 to \$59,999	12.8%	12.4%	12.7%
\$60,000 to \$79,999	16.6%	15.3%	16.2%
\$80,000 to \$99,999	13.6%	14.1%	13.8%
\$100,000 to \$119,999	13.7%	13.6%	13.7%
\$120,000 or More	31.2%	32.7%	31.7%

\* Percentages may not add exactly to 100 percent due to rounding.

**ZIP CODES OF PRIMARY HOME ADDRESS REPORTED BY THE SURVEY RESPONDENTS**

**TABLE 33: City/Town of Residence Reported by Survey Respondents who are Palm Beach County\* RESIDENTS**

ZIP CODE	CITY/TOWN	NUMBER OF SURVEY RESPONDENTS	PERCENTAGE OF ALL RESIDENTS
33430	Belle Glade	101	1.0%
33431	Boca Raton	214	2.2%
33432	Boca Raton	234	2.4%
33433	Boca Raton	255	2.6%
33434	Boca Raton	223	2.3%
33428	Boca Raton	146	1.5%
33486	Boca Raton	176	1.8%
33487	Boca Raton	172	1.8%
33496	Boca Raton	160	1.6%
33498	Boca Raton	75	0.8%
33472	Boynton Beach	169	1.7%
33473	Boynton Beach	103	1.1%
33426	Boynton Beach	134	1.4%
33435	Boynton Beach	173	1.8%
33436	Boynton Beach	248	2.5%
33437	Boynton Beach	471	4.8%
33438	Canal Point	4	0.0%
33444	Delray Beach	167	1.7%
33445	Delray Beach	221	2.3%
33446	Delray Beach	248	2.5%
33483	Delray Beach	162	1.7%
33484	Delray Beach	189	1.9%
33413	Greenacres	59	0.6%
33458	Jupiter	298	3.1%
33469	Jupiter	124	1.3%
33477	Jupiter	205	2.1%
33478	Jupiter Farms	77	0.8%
33403	Lake Park	53	0.5%
33463	Lake Worth	162	1.7%
33467	Lake Worth	409	4.2%
33460	Lake Worth	243	2.5%
33461	Lake Worth	132	1.4%
33449	Lake Worth	121	1.2%
33462	Lantana	162	1.7%
33408	North Palm Beach	205	2.1%
33476	Pahokee	19	0.2%
33480	Palm Beach	308	3.2%
33410	Palm Beach Gardens	291	3.0%
33418	Palm Beach Gardens	474	4.9%
33404	Riviera Beach	155	1.6%
33411	Royal Palm Beach	371	3.8%
33493	South Bay	12	0.1%
33412	The Acreage	124	1.3%
33470	The Acreage	108	1.1%
33414	Wellington	351	3.6%
33415	West Palm Beach	130	1.3%
33417	West Palm Beach	144	1.5%
33401	West Palm Beach	390	4.0%
33409	West Palm Beach	123	1.3%
33405	West Palm Beach	201	2.1%
33406	West Palm Beach	118	1.2%
33407	West Palm Beach	147	1.5%

\* This table includes only the 9,761 surveys that were provided by respondents who reported a valid primary home ZIP code that is located in Palm Beach County.

**ZIP CODES OF PRIMARY HOME ADDRESS REPORTED BY THE SURVEY RESPONDENTS (continued)**

**TABLE 34: State of Residence Reported by Survey Respondents who are Palm Beach County NON-RESIDENTS\***

STATE	NUMBER OF SURVEY RESPONDENTS	PERCENTAGE OF ALL NON-RESIDENTS
Alabama	12	0.3%
Alaska	3	0.1%
Arizona	17	0.4%
Arkansas	10	0.2%
California	93	2.1%
Colorado	47	1.1%
Connecticut	81	1.8%
Delaware	18	0.4%
District of Columbia	30	0.7%
Florida	2,070	46.8%
Georgia	70	1.6%
Hawaii	1	0.0%
Idaho	3	0.1%
Illinois	98	2.2%
Indiana	33	0.7%
Iowa	16	0.4%
Kansas	14	0.3%
Kentucky	21	0.5%
Louisiana	11	0.2%
Maine	18	0.4%
Maryland	84	1.9%
Massachusetts	153	3.5%
Michigan	69	1.6%
Minnesota	44	1.0%
Mississippi	8	0.2%
Missouri	39	0.9%
Montana	6	0.1%
Nebraska	5	0.1%
Nevada	4	0.1%
New Hampshire	32	0.7%
New Jersey	192	4.3%
New Mexico	3	0.1%
New York	472	10.7%
North Carolina	72	1.6%
North Dakota	3	0.1%
Ohio	98	2.2%
Oklahoma	5	0.1%
Oregon	16	0.4%
Pennsylvania	132	3.0%
Rhode Island	25	0.6%
South Carolina	22	0.5%
South Dakota	8	0.2%
Tennessee	46	1.0%
Texas	57	1.3%
Utah	6	0.1%
Vermont	17	0.4%
Virginia	70	1.6%
Washington	23	0.5%
West Virginia	6	0.1%
Wisconsin	34	0.8%
Wyoming	2	0.0%

\* This table includes only the 4,419 surveys that were provided by respondents who reported a valid primary home ZIP code that is located outside of Palm Beach County, but inside the United States.