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## FRONT International: Cleveland Triennial For Contemporary Art: An American City

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# **FRONT International: Cleveland Triennial For Contemporary Art: An American City**

## **2018 Economic Impact Study**

Prepared by the Center for Economic Development

Cleveland State University

Dr. Iryna V. Lendel, Matthew B. Ellerbrock

November 27, 2018



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# Goal and of the Study: Illustrate Economic Impact of the Event and Organization

- Region of impact: the Cleveland-Elyria-Mentor and Akron Metropolitan Statistical Areas (Cleveland-Akron Region)
- Economic impact consists of two components:
  - Impact of visitor spending (only visitors from outside of Cleveland-Akron Region were considered)
  - Impact of 2018 operating budget of the organization
- The data of 2018 operating budget and visitors by venue were used to assess the economic impact



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# Scenarios of Economic Impact

- Visitor spending has two types of visitors:
  - those attending FRONT sites only – **6,211**
  - those attending ALL sites – **227,379**
- Spending of visitors is based on other studies and a number of methodological assumptions:
  - **OPTIMISTIC** scenario uses study from "Prospect.2 New Orleans" art festival
  - **CONSERVATIVE** scenario uses data from other Cleveland studies that included visitor spending effect (CPAC, RNC and other studies conducted by CED)



# Main Assumptions of Methodology

- Time a visitor spent at each venue is assumed to be 1 hour, except for larger venues where estimated time people spend is 2 hours
  - These 2-hour venues include: Akron Art Museum, Allen Memorial Art Museum, Cleveland Museum of Art, and MOCA Cleveland
- Travel time between venues in the same city is assumed to be 30 minutes
- Total travel time (round trip) between Akron or Oberlin and Cleveland venues is assumed to be 2 hours
- Five hours at art exhibits and travel between venues are considered a full day of visit and constitute a one-night stay at a hotel

# Assumptions of Spending

- Since this study did not have questions on spending in its own survey, all spending is based on estimates of other studies and average costs of Cleveland hotels and flights
- Hotels in Cleveland show an average price of \$150/day; assuming some visitors stayed at lower priced hotels surrounding Cleveland (or within Akron or Oberlin) or stay with family/friends, the estimated price of nightly hotel stay is assumed to be \$125
- Travel cost is derived by distance (travel by car vs. flying – Appendix A)
  - ½ of the flight cost is included in economic impact modeling
  - visitors who answered as “Happened Upon It” as how they found the site are not included in the travel cost calculation, as they are assumed to have made arrangements to travel to the region for other reasons

# Assumptions of Daily Spending: Optimistic

- Using average daily spending from 2012 University of New Orleans survey of 229 respondents from "Prospect.2 New Orleans" art festival
- The average spending is adjusted for 2018 cost
- This spending establishes an **OPTIMISTIC** daily average spending per visitor – base for optimistic scenario

Individual Daily Avg Expenditures (CLE/AKR)		
	Overnight	Daytrip
<b>Hotel</b>	\$125.00	\$0.00
<b>Restaurants</b>	\$122.15	\$84.85
<b>Bars/Nightclubs</b>	\$22.61	\$22.85
<b>Entertainment</b>	\$10.14	\$2.18
<b>Shopping</b>	\$82.61	\$45.69
<b>Transport</b>	\$22.92	\$9.36
<b>Gambling</b>	\$2.52	\$0.00
<b>TOTAL</b>	<b>\$387.95</b>	<b>\$164.92</b>



# Assumptions of Spending: Conservative

- Using average daily spending from 2014 Community Partnership for the Arts (CPAC – now Arts Cleveland) report by CED
- The average spending is adjusted for 2018 cost
- This spending establishes a **CONSERVATIVE** daily average spending per visitor – base for conservative scenario

Individual Daily Avg Expenditures (CLE/AKR)		
	Overnight	Daytrip
Hotel	\$125.00	\$0.00
Restaurants	\$66.00	\$28.00
Shopping	\$30.00	\$24.14
Transport	\$22.92	\$9.36
Gambling	\$2.52	\$0.00
<b>TOTAL</b>	<b>\$246.44</b>	<b>\$61.50</b>



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# 2018 Annual Operational Budget

- The total operating budget of FRONT Exhibition Company is \$3,690,535
- The operating budget is modeled through:
  - Operating expenses
  - Advertising and marketing
  - Publications
  - Education
  - Development and PR events
  - Cost of sold goods
  - Fees and salaries

# 2018 Economic Impact of FRONT Festival on Cleveland-Akron Region



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# 2018 Total Economic Impact: Optimistic Scenario – FRONT Sites

	Employment	Labor Income	Value Added	Output	State & Local Tax
<b>Direct</b>	50	\$1.3M	\$2.6M	\$5.0M	\$0.4M
<b>Indirect</b>	53	\$1.1M	\$2.0M	\$3.9M	\$0.1M
<b>Induced</b>	16	\$0.7M	\$1.3M	\$2.2M	\$0.1M
<b>Total</b>	<b>119</b>	<b>\$3.1M</b>	<b>\$5.9M</b>	<b>\$11.1M</b>	<b>\$0.6M</b>

Includes effect from spending the operational budget and optimistic visitor spending accounting only for visitors attending **FRONT** sites (6,211)

# 2018 Total Economic Impact: Optimistic Scenario – All Sites

	Employment	Labor Income	Value Added	Output	State & Local Tax
<b>Direct</b>	1,532	\$37.9M	\$49.9M	\$95.M	\$7.2M
<b>Indirect</b>	1,762	\$12.9M	\$23.2M	\$39.7M	\$1.7M
<b>Induced</b>	331	\$14.5M	\$27.6M	\$45.8M	\$2.7M
<b>Total</b>	<b>3,625</b>	<b>\$65.3M</b>	<b>\$100.8M</b>	<b>\$180.4M</b>	<b>\$11.6M</b>

Includes effect from spending the operational budget and optimistic all visitor spending (visitors attending **ALL** sites – **227,379**)

# 2018 Total Economic Impact: Conservative Scenario – FRONT Sites

	Employment	Labor Income	Value Added	Output	State & Local Tax
<b>Direct</b>	36	\$1.0M	\$2.3M	\$4.4M	\$0.3M
<b>Indirect</b>	52	\$1.0M	\$1.8M	\$3.6M	\$0.1M
<b>Induced</b>	13	\$0.6M	\$1.1M	\$1.9M	\$0.1M
<b>Total</b>	<b>101</b>	<b>\$2.6M</b>	<b>\$5.2M</b>	<b>\$9.9M</b>	<b>\$0.6M</b>

Includes effect from spending the operational budget and conservative visitor spending accounting only for visitors attending **FRONT** sites (**6,211**)

# 2018 Total Economic Impact: Conservative Scenario – All Sites

	Employment	Labor Income	Value Added	Output	State & Local Tax
<b>Direct</b>	761	\$20.7M	\$32.9M	\$61.8M	\$4.9M
<b>Indirect</b>	1,688	\$8.8M	\$15.3M	\$26.6M	\$1.1M
<b>Induced</b>	192	\$8.5M	\$16.1M	\$26.6M	\$1.6M
<b>Total</b>	<b>2,641</b>	<b>\$38.0M</b>	<b>\$64.2M</b>	<b>\$115.0M</b>	<b>\$7.6M</b>

Includes effect from spending the operational budget and conservative all visitor spending (visitors attending **ALL** sites – **227,379**)

# 2018 Operating Impact

	Employment	Labor Income	Value Added	Output	State & Local Tax
<b>Direct</b>	26*	\$749,841	\$1,882,173	\$3,690,535	\$252,103*
<b>Indirect</b>	50	\$940,930	\$1,649,682	\$3,333,606	\$124,123
<b>Induced</b>	11	\$485,758	\$922,944	\$1,529,594	\$89,572
<b>Total</b>	<b>87</b>	<b>\$2,176,529</b>	<b>\$4,454,799</b>	<b>\$8,553,735</b>	<b>\$465,798</b>

\*Full-time and part-time employees and taxes are estimated by IMPLAN

# Top 10 Industries Affected by Operating Expenses, 2018

Industry	Employment	Labor Income	Output
Independent artists, writers, and performers	55	\$790,274	\$4,238,022
Museums, historical sites, zoos, and parks	6	\$134,267	\$419,246
Real estate	2	\$34,271	\$507,696
Advertising, public relations, and related services	2	\$113,798	\$399,379
Promoters of performing arts	2	\$146,537	\$367,557
Employment services	1	\$34,652	\$75,475
Full-service restaurants	1	\$17,244	\$37,874
Other educational services	1	\$13,623	\$25,007
Hospitals	1	\$54,009	\$107,005
Limited-service restaurants	1	\$10,920	\$48,114



# 2018 FRONT Site Visitors Impact: Optimistic Scenario

	Employment	Labor Income	Value Added	Output	State & Local Tax
<b>Direct</b>	24	\$570,739	\$677,196	\$1,331,656	\$100,551
<b>Indirect</b>	3	\$174,849	\$318,620	\$535,293	\$23,169
<b>Induced</b>	5	\$213,519	\$405,705	\$672,267	\$39,412
<b>Total</b>	<b>32</b>	<b>\$959,106</b>	<b>\$1,401,521</b>	<b>\$2,539,215</b>	<b>\$163,132</b>

- **FRONT sites include:**

- The Arcade
- FRONT Porch, PNC Glenville Arts Campus
- St. John's Episcopal Church
- Vista Warehouse A, Lauren Yeager
- Vista Warehouse B, Guilliam Leblon and Thomas Boutoux



# 2018 FRONT Site Visitors Impact: Conservative Scenario

	Employment	Labor Income	Value Added	Output	State & Local Tax
<b>Direct</b>	10	\$265,658	\$375,033	\$743,893	\$60,332
<b>Indirect</b>	2	\$102,167	\$178,257	\$303,846	\$12,642
<b>Induced</b>	2	\$105,333	\$200,142	\$331,641	\$19,443
<b>Total</b>	<b>14</b>	<b>\$473,158</b>	<b>\$753,432</b>	<b>\$1,379,379</b>	<b>\$92,417</b>

- **FRONT sites include:**

- The Arcade
- FRONT Porch, PNC Glenville Arts Campus
- St. John's Episcopal Church
- Vista Warehouse A, Lauren Yeager
- Vista Warehouse B, Guillian Leblon and Thomas Boutoux

# 2018 All Site Visitors Impact: Optimistic Scenario

	Employment	Labor Income	Value Added	Output	State & Local Tax
<b>Direct</b>	1,506	\$37.1M	\$48.1M	\$91.3M	\$6.9M
<b>Indirect</b>	220	\$12.0M	\$21.5M	\$36.3M	\$1.6M
<b>Induced</b>	320	\$14.1M	\$26.7M	\$44.3M	\$2.6M
<b>Total</b>	<b>2,046</b>	<b>\$63.2M</b>	<b>\$96.3M</b>	<b>\$171.9M</b>	<b>\$11.1M</b>

## FRONT sites include:

- The Arcade
- FRONT Porch, PNC Glenville Arts Campus
- St. John's Episcopal Church
- Vista Warehouse A, Lauren Yeager
- Vista Warehouse B, Guillian Leblon and Thomas Boutoux

## Additional Partner sites include:

- Akron Art Museum
- Allen Memorial Art Museum
- Richard D Baron Gallery
- Weltzheimer Johnson House - Frank Lloyd Wright
- Cleveland Clinic
- Cleveland Institute of Art
- Cleveland Museum of Art
- Cleveland Public Library
- Federal Reserve Bank of Cleveland
- MOCA Cleveland
- Playhouse Square, Helen Theater
- Rock & Roll Hall of Fame
- SPACES
- Steamship William G Mather
- Transformer Station (inside or exterior)
- West Side Market, John Reipenhoff
- Canvas City Murals
- St. Mark's Church
- Toby's Plaza, CWRU
- The Madison
- University Hospital, exterior Virginia Overton



# 2018 All Site Visitors Impact: Conservative Scenario

	Employment	Labor Income	Value Added	Output	State & Local Tax
<b>Direct</b>	735	\$19.9M	\$31.0M	\$58.1M	\$4.7M
<b>Indirect</b>	146	\$7.9M	\$13.6M	\$23.3M	\$1.0M
<b>Induced</b>	181	\$8.0M	\$15.1M	\$25.1M	\$1.5M
<b>Total</b>	<b>1,063</b>	<b>\$35.8M</b>	<b>\$59.7M</b>	<b>\$106.5M</b>	<b>\$7.1M</b>

## FRONT sites include:

- The Arcade
- FRONT Porch, PNC Glenville Arts Campus
- St. John's Episcopal Church
- Vista Warehouse A, Lauren Yeager
- Vista Warehouse B, Guillian Leblon and Thomas Boutoux

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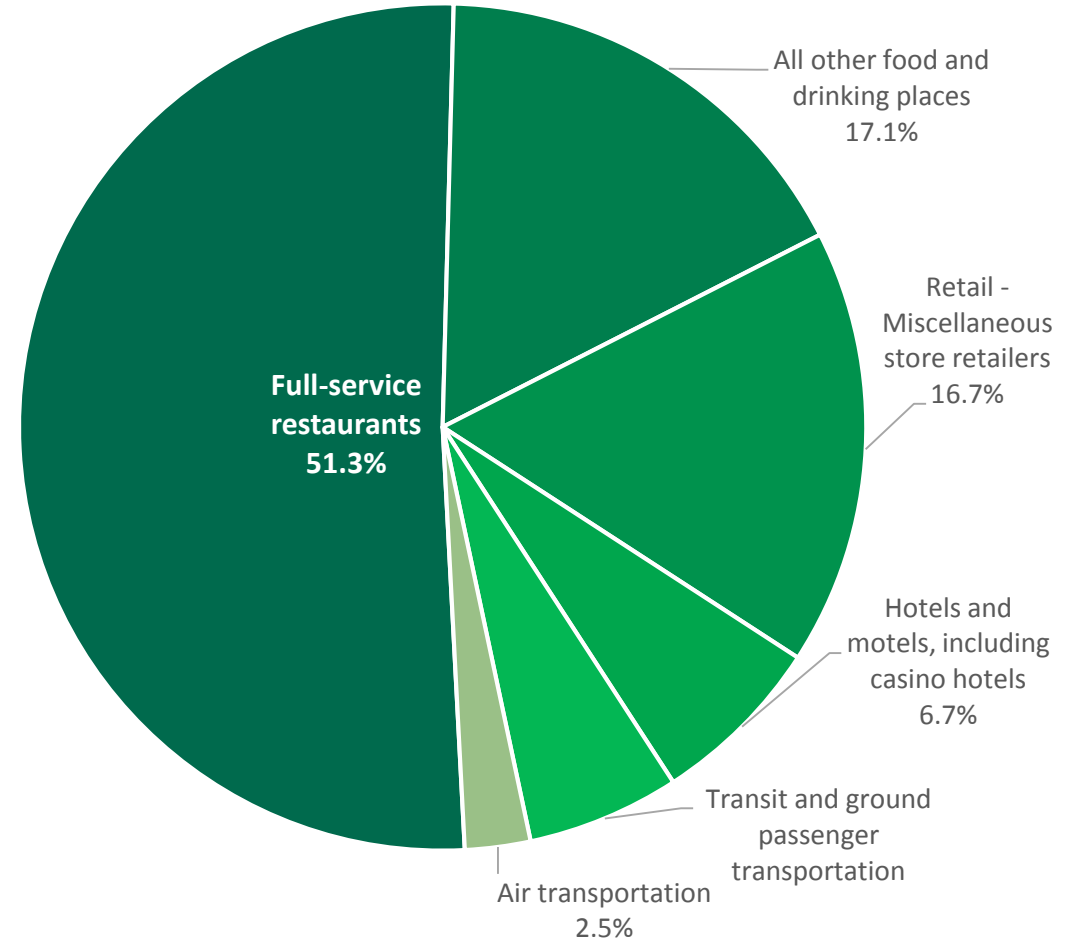


# Top Employment Industries Affected by FRONT Site Visitors, Optimistic Scenario, 2018

Industry	Employment	Labor Income	Output
Full-service restaurants	12	\$262,625	\$576,802
All other food and drinking places	4	\$105,021	\$147,772
Retail - Miscellaneous store retailers	4	\$81,230	\$158,531
Hotels and motels, including casino hotels	2	\$50,789	\$170,387
Transit and ground passenger transportation	1	\$23,540	\$75,539
Real estate	1	\$9,149	\$135,528
Air transportation	1	\$54,834	\$208,355
Other amusement and recreation industries	1	\$8,770	\$25,378

# Top Employment Industries Affected by FRONT Site Visitors, Optimistic Scenario, 2018

Industry	Direct
Full-service restaurants	12
All other food and drinking places	4
Retail - Miscellaneous store retailers	4
Hotels and motels, including casino hotels	2
Transit and ground passenger transportation	1
Air transportation	1

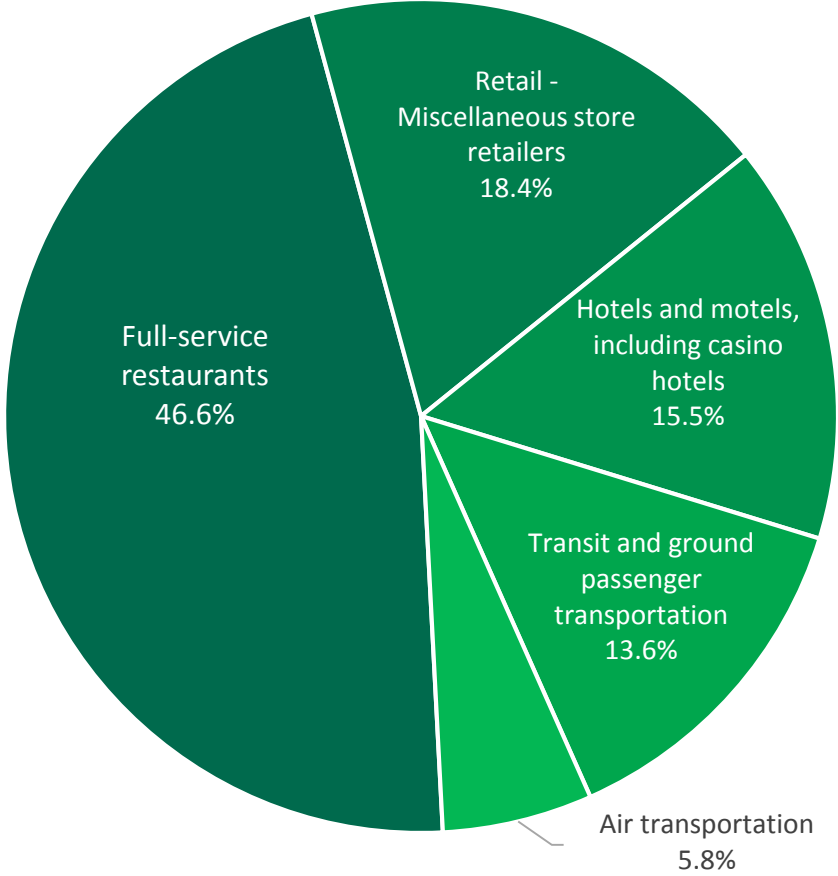


# Top Employment Industries Affected by FRONT Site Visitors, Conservative Scenario, 2018

Industry	Employment	Labor Income	Output
Full-service restaurants	5	\$102,525	\$225,175
Retail - Miscellaneous store retailers	2	\$38,644	\$75,419
Hotels and motels, including casino hotels	2	\$50,701	\$170,089
Transit and ground passenger transportation	1	\$23,295	\$74,754
Air transportation	1	\$54,190	\$205,909

# Top Employment Industries Affected by FRONT Site Visitors, Conservative Scenario, 2018

Industry	Direct
Retail - Miscellaneous store retailers	2
Full-service restaurants	2
Hotels and motels, including casino hotels	2
Transit and ground passenger transportation	1
Air transportation	1



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# 2018 Estimated Economic Impact

ALL Sites Output Impact ( <i>Conservative Scenario</i> )	:	\$106.5M
FRONT Sites Output Impact ( <i>Conservative Scenario</i> )	-	\$1.4M
Partner Sites Output Impact ( <i>Conservative Scenario</i> )	=	\$105.1M
Estimated Incremental Visitor Increase*	x	20%
Estimated Partner Sites Incremental Impact	=	\$21.0M
FRONT Operating Output Impact	+	\$8.6M
FRONT Sites Output Impact ( <i>Conservative Scenario</i> )	+	\$1.4M
<b>2018 Estimated Economic Impact (All Sites + Operating)</b>	<b>=</b>	<b>\$31.0M</b>

\*Most participating partners who reported attendance in current versus prior year showed attendance increases of more than 20%



# Appendix A: Assumptions on Cost of Travel

We used a multiple ring buffer for travel costs for visitors from their home ZIP code:

- If within CLE/AKR MSAs = \$20 on gas to get to destination.
- If within 250 miles = \$40 on gas fill-up to get there (\$2.71 was average price for gallon of gas in Ohio, according to EIA for July 2018 through October 2018, fill-up assumed to be ~15 gallons,  $\$2.71 * 15 = \$40.69$ ), we assume most drove this distance
- If within 500 miles = \$135 spent (portion of \$270 ticket CLE gets) (researched plane ticket prices into Cleveland Hopkins from various parts of the country for summer months)
- If within 1000 miles = \$175 spent (portion of \$350 ticket CLE gets)
- If within 2500 miles = \$250 spent (portion of \$500 ticket CLE gets)
- If within 5000 miles = \$425 spent (portion of \$850 ticket CLE gets)
- If “Toronto, ON” = \$200 spent (portion of \$400 ticket CLE gets)
- If any other international (i.e. Germany, Amsterdam, China, India, Portugal) = \$750 spent (portion of \$1500 ticket CLE gets)

# Appendix B: Reservations

Notes on assumptions and certain items not factored into calculations because of limitations of the data

- Hotel totals are calculated based on individual visitor pricing, surveyed responses did not provide adequate data to run analysis with party size in mind (i.e. multiple visitors sharing a hotel)
- Assumptions on total time spent at all sites plus travel time might overstate expenditures, especially on the higher end of visits (e.g. several surveyed visitors responded as having visited all 27 sites, resulting in 52.5 hours total time each, or 11 days of expenditures)
- Because comparison baseline 2017 attendance numbers were not provided by many venues, total attendance at each site was used to calculate expenditures of all visitors, not only those attending sites due to FRONT International. We believe that only about 20% of partners' sites attendance is due to FRONT International
- 6.27% (201) of surveyed attendees “happened upon” FRONT International. These respondents were not included in the calculations for travel expenses to and from Cleveland. However, their expenses for hotel, food and other expenditures were included in calculating the economic impact. Some expenses for these attendees may be overstated, since this spending might have occurred regardless of their attendance of partners' sites



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