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## FRONT International: Cleveland Triennial for Contemporary Art 2022 Economic Impact Study

Molly Schnoke  
*Cleveland State University*, [m.s.schnoke@csuohio.edu](mailto:m.s.schnoke@csuohio.edu)

Shannon Driscoll  
*Cleveland State University*, [m.s.driscoll@csuohio.edu](mailto:m.s.driscoll@csuohio.edu)

Jack Yochum  
*Cleveland State University*, [j.yochum@csuohio.edu](mailto:j.yochum@csuohio.edu)

Izzy Esler

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# **FRONT International: Cleveland Triennial For Contemporary Art**

## **2022 Economic Impact Study**

Prepared by the Center for Economic Development

Cleveland State University

Molly Schnoke, Shannon Driscoll, Jack Yochum, Izzy Esler

February 21, 2023



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# Goal 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)
  - Includes: Cuyahoga, Geauga, Lake, Lorain, Medina, Portage, and Summit Counties
- Economic impact consists of two components:
  - Impact of visitor spending (only visitors from outside of Cleveland-Akron Region were considered)
  - Impact of 2022 operating budget of the organization



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# FRONT International 2022 Sites

- Akron Art Museum
- Allen Memorial Art Museum
- **Audra Skuodas Studio**
- **BOP STOP**
- **Carillon**
- Cleveland Clinic Bio Repository
- Cleveland Institute of Art – Reinberger Gallery
- Cleveland Institute of Art – Cinematheque
- Cleveland Clinic – Miller Family Pavilion
- Cleveland Museum of Art
- Cleveland Public Library
- **Emily Davis Gallery**
- **FAVA**
- **JUKEBOX**
- **Karamu**
- **Lock 4**
- moCa Cleveland
- **National Museum of Psychology at Cummings Center**
- **North Coast Harbor**
- ***Portal* at The Justice Center**
- **Quaker Square**
- **Quincy Garden**
- Rock and Roll Hall of Fame
- **Samson**
- SPACES
- **Syrian Cultural Garden**
- **The Feve**
- **The Sculpture Center**
- Transformer Station
- **Wade Oval**



# Number of Site Visitors at Selected Venues in 2022 Compared to Previous Years

Venue:	FRONT 2022 (80 days) July 14–Oct. 2 2022	% change from 2021 to 2022	% change from 2020 to 2023	% change from 2019 to 2022	% change from 2018 to 2022
Akron Art Museum	5977	65%	56%	-45%	-
Allen Memorial Art Museum	9186	91%	1027%	44%	27%
Carillon	2557	68%	-	-	-
CIA - Reinberger Gallery	2156	79%	-	-23%	-
Emily Davis Gallery	955	19%	-	-37%	-
FAVA	590	90%	-	140%	-
moCa	5095	26%	4847%	-31%	-50%
National Museum of Psychology at Cummings Center	843	70%	-	10%	-13%
SPACES	1376	138%	677%	23%	-69%
The Sculpture Center	1065	33%	-	-	-
Transformer Station (FRONT PNC HUB)	3195	-	124%	-9%	-15%

*Note: all previous year totals were taken from July 14 – October 2  
Data was not available for all years and venues.*

# Scenarios of Economic Impact

- Visitor spending is based on the estimated total site visits and encounters with FRONT exhibits of **375,035\***  
(The 2018 study estimated 227,379 site visits)
- 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

\*See Appendix A



# 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 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 \$231/night and the average price for a hotel in Akron was \$99/night. Assuming some visitors stayed at the lower priced hotels within Akron or stayed with family/friends, the estimated price of nightly hotel stay is assumed to be \$190.
- Travel cost to the MSA is derived by distance (travel by car vs. flying – Appendix B)
  - 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 2022 cost
- This spending establishes an **OPTIMISTIC** daily average spending per visitor – base for optimistic scenario

Individual Daily Avg Expenditures (CLE/AKR)		
	Overnight	Daytrip
Hotel	\$190.00	\$0.00
Restaurants	\$141.14	\$98.28
Bars/Nightclubs	\$26.18	\$26.46
Entertainment	\$11.74	\$2.52
Shopping	\$95.68	\$52.92
Transport	\$26.55	\$10.84
Gambling	\$2.92	\$0.00
<b>TOTAL</b>	<b>\$494.21</b>	<b>\$191.02</b>



# Assumptions of Spending: Conservative

- Using average daily spending from data collected for other reports prepared by CED
- The average spending is adjusted for 2022 cost
- This spending establishes a **CONSERVATIVE** daily average spending per visitor – base for conservative scenario

Individual Daily Avg Expenditures (CLE/AKR)		
	Overnight	Daytrip
<b>Hotel</b>	\$190.00	\$0.00
<b>Restaurants</b>	\$77.22	\$32.76
<b>Shopping</b>	\$35.10	\$28.24
<b>Transport</b>	\$26.82	\$10.95
<b>Gambling</b>	\$2.95	\$0.00
<b>TOTAL</b>	<b>\$332.09</b>	<b>\$71.95</b>



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# 2022 Annual Operational Budget

- The total operating budget of FRONT Exhibition Company is \$3,008,158
- The operating budget is modeled through:
  - Staff Salaries
  - Personnel Contracts
  - Artist Fees and Production
  - Cost of sold goods
  - Development and PR events
  - Education and Outreach
  - Publications
  - Advertising/Marketing
  - Operating Expenses



# 2022 Economic Impact of FRONT Festival on Cleveland-Akron Region



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# 2022 Total Economic Impact: Optimistic Scenario

	Employment	Labor Income	Value Added	Output	State & Local Tax
<b>Direct</b>	1,044	\$32.0M	\$50.0M	\$90.2M	\$4.7M
<b>Indirect</b>	210	\$14.2M	\$22.6M	\$40.5M	\$1.8M
<b>Induced</b>	217	\$12.4M	\$22.2M	\$37.8M	\$2.2M
<b>Total</b>	<b>1,471</b>	<b>\$58.6M</b>	<b>\$94.8M</b>	<b>\$168.6M</b>	<b>\$8.7M</b>

Includes effect from spending the operational budget and optimistic visitor spending

# 2022 Total Economic Impact: Conservative Scenario

	Employment	Labor Income	Value Added	Output	State & Local Tax
<b>Direct</b>	758	\$22.9M	\$37.1M	\$67.7M	\$3.7M
<b>Indirect</b>	159	\$10.5M	\$16.8M	\$30.0M	\$1.4M
<b>Induced</b>	157	\$9.0M	\$16.1M	\$27.4M	\$1.6M
<b>Total</b>	<b>1,074</b>	<b>\$42.5M</b>	<b>\$70.0M</b>	<b>\$125.1M</b>	<b>\$6.7M</b>

Includes effect from spending the operational budget and conservative visitor spending

# 2022 Operating Impact

	Employment	Labor Income	Value Added	Output	State & Local Tax
<b>Direct</b>	19*	\$886,795	\$1,703,727	\$2,882,534	\$0**
<b>Indirect</b>	6	\$380,719	\$653,793	\$1,212,676	\$35,785
<b>Induced</b>	7	\$392,881	\$703,680	\$1,196,570	\$70,963
<b>Total</b>	<b>32</b>	<b>\$1,660,395</b>	<b>\$3,061,199</b>	<b>\$5,231,780</b>	<b>\$83,431</b>

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

\*\*Due to the pandemic-related infusion of funds in 2021, the net direct tax impact paid by FRONT equals zero (as estimated by IMPLAN for the most recent data year available, 2021)

# Top Industries Affected by Operating Expenses, 2022

Industry	Employment	Labor Income	Output
Museums, historical sites, zoos, and parks	8	\$312,249	\$717,409
Advertising, public relations, and related services	3	\$173,490	\$508,621
Performing arts companies	2	\$862,711	\$330,520
Independent artists, writers, and performers	2	\$41,760	\$419,073
Promoters of performing arts	1	\$52,959	\$168,000
Printing	1	\$49,706	\$143,296
Other financial investment activities	1	\$35,939	\$138,249



# 2022 Site Visitors Impact: Optimistic Scenario

	Employment	Labor Income	Value Added	Output	State & Local Tax
<b>Direct</b>	1,025	\$31.2M	\$48.3M	\$87.4M	\$4.7M
<b>Indirect</b>	204	\$13.8M	\$21.9M	\$39.3M	\$1.7M
<b>Induced</b>	210	\$12.0M	\$21.5M	\$36.6M	\$2.2M
<b>Total</b>	<b>1,439</b>	<b>\$57.0M</b>	<b>\$91.8M</b>	<b>\$163.3M</b>	<b>\$8.6M</b>

# 2022 Site Visitors Impact: Conservative Scenario

	Employment	Labor Income	Value Added	Output	State & Local Tax
<b>Direct</b>	739	\$22.1M	\$35.4M	\$64.9M	\$3.7M
<b>Indirect</b>	153	\$10.1M	\$16.2M	\$28.7M	\$1.3M
<b>Induced</b>	150	\$8.6M	\$15.4M	\$26.2M	\$1.6M
<b>Total</b>	<b>1,042</b>	<b>\$40.8M</b>	<b>\$67.0M</b>	<b>\$120.0M</b>	<b>\$6.6M</b>



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# Top Employment Industries Affected by Site Visitors, Optimistic Scenario, 2022

Industry	Employment	Labor Income	Output
Full-service restaurants	328	\$9.6M	\$25.9M
Hotels and motels, including casino hotels	258	\$11.0M	\$32.4M
Transit and ground passenger transportation	255	\$2.4M	\$7.6M
All other food and drinking places	72	\$2.4M	\$4.9M
Retail – General merchandise stores	65	\$2.1M	\$5.6M
Air transportation	22	\$2.6M	\$8.4M
Museums, historical sites, zoos, and parks	22	\$891,344	\$2.0M
Gambling industries (except casino hotels)	2	\$95.5M	\$497,879

# Top Employment Industries Affected by Site Visitors, Conservative Scenario, 2022

Industry	Employment	Labor Income	Output
Hotels and motels, including casino hotels	258	\$11.0M	\$32.4M
Transit and ground passenger transportation	257	\$2.4M	\$7.7M
Full-service restaurants	175	\$5.1M	\$13.8M
Retail - Miscellaneous store retailers	24	\$798,506	\$2.1M
Air transportation	22	\$2.6M	\$8.4M
Gambling industries (except casino hotels)	2	\$96,441	\$502,994

# Results of Participant Survey

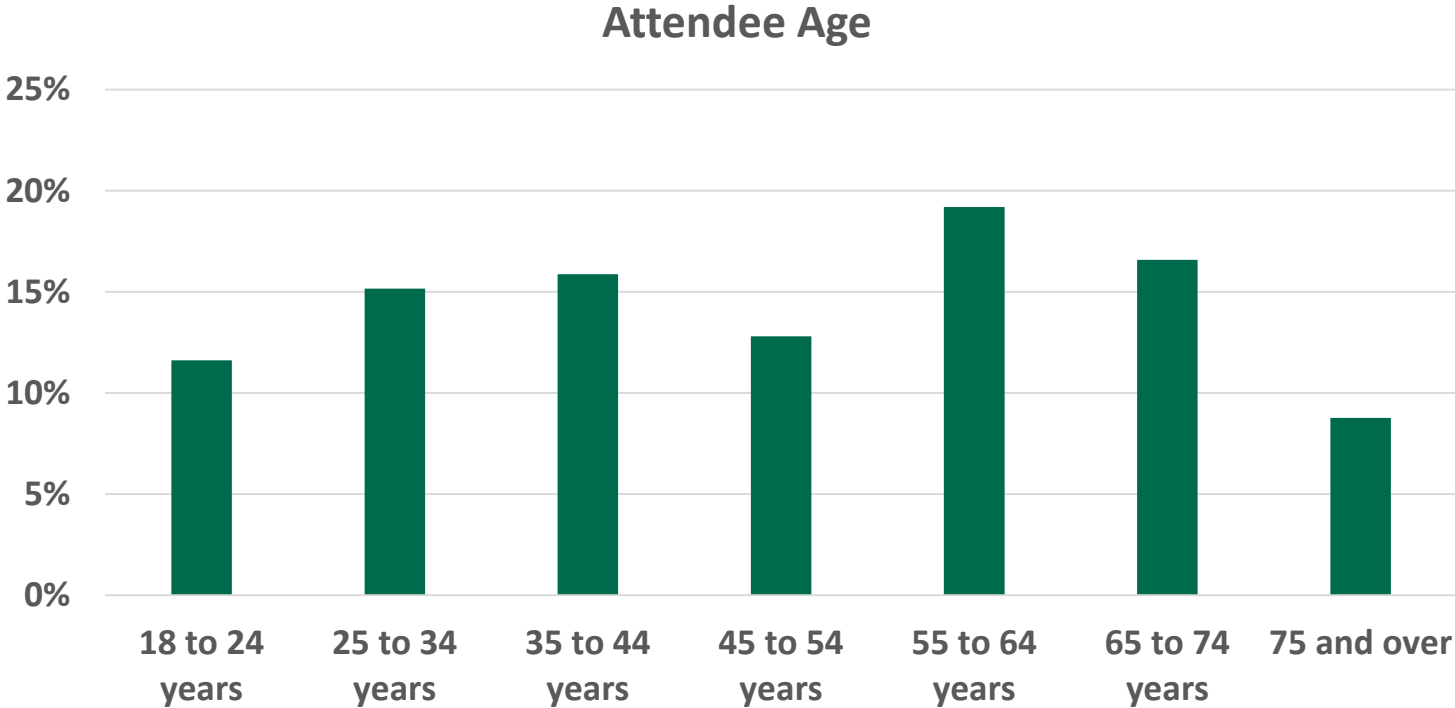
Survey results include all respondents both within and outside of the Cleveland-Akron MSA



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# Age of Participants

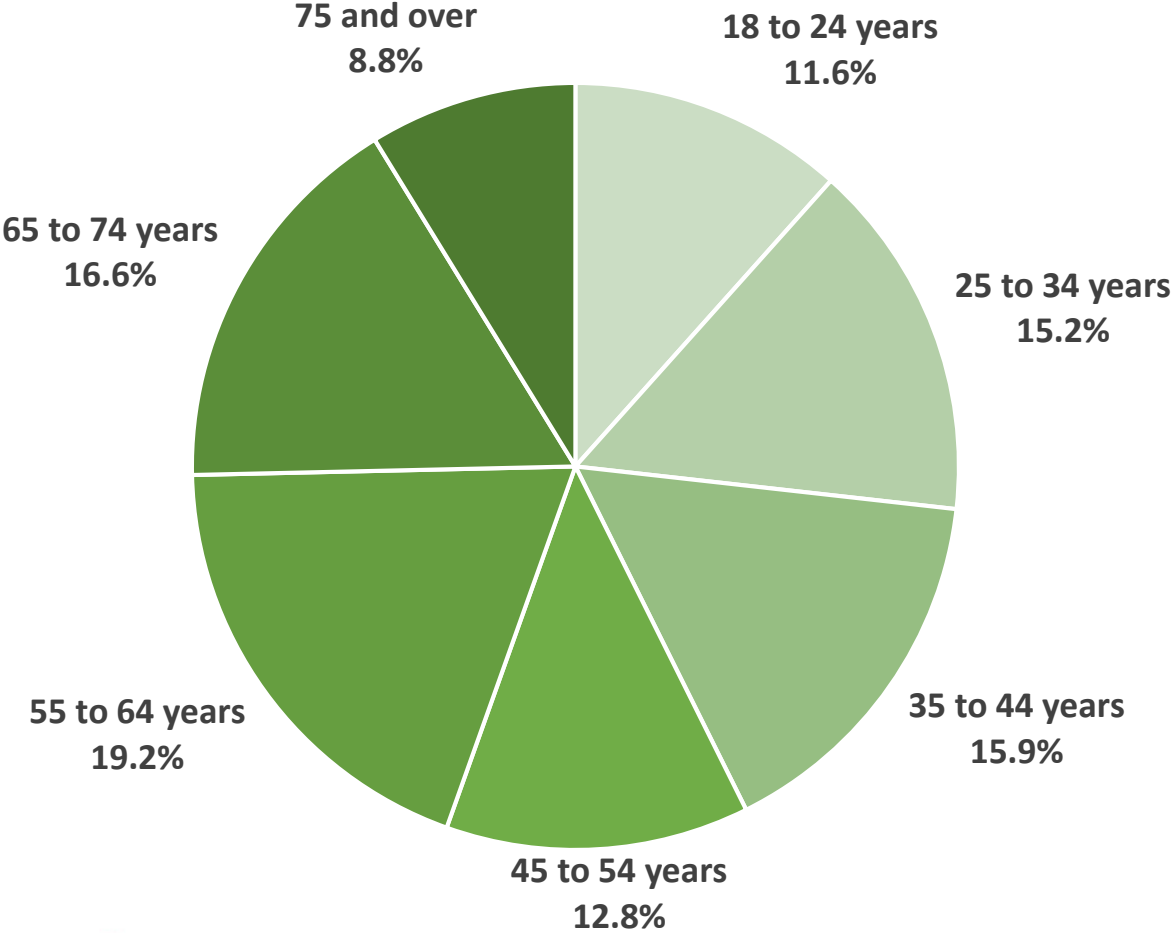


The most common age group represented was 55-64 years, while the least represented age group was 75 years and older.



# Age of Participants

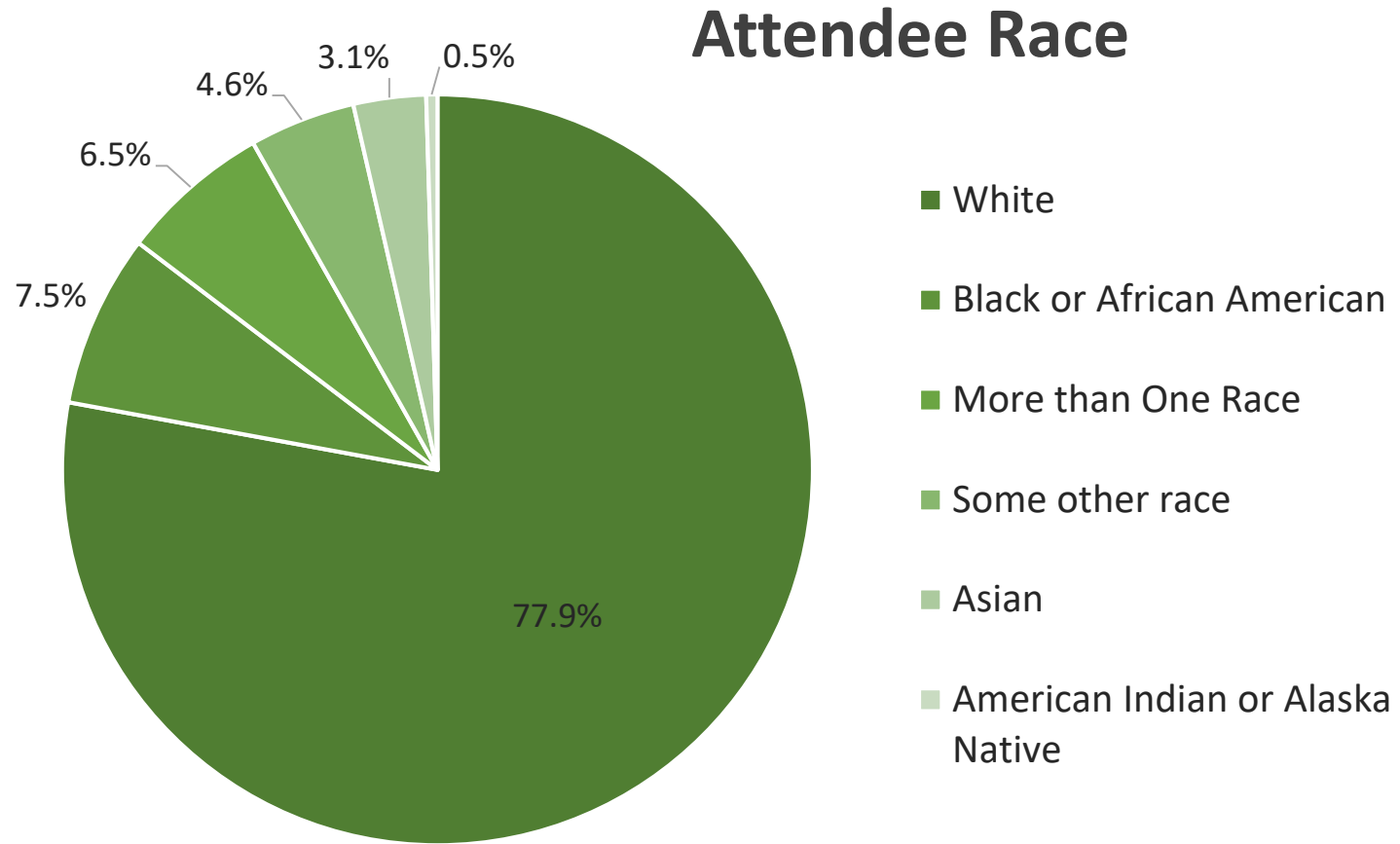
Attendee Age Breakdown



- The most common age group to participate was 55-64 years
- The least represented age group was 75 years and older

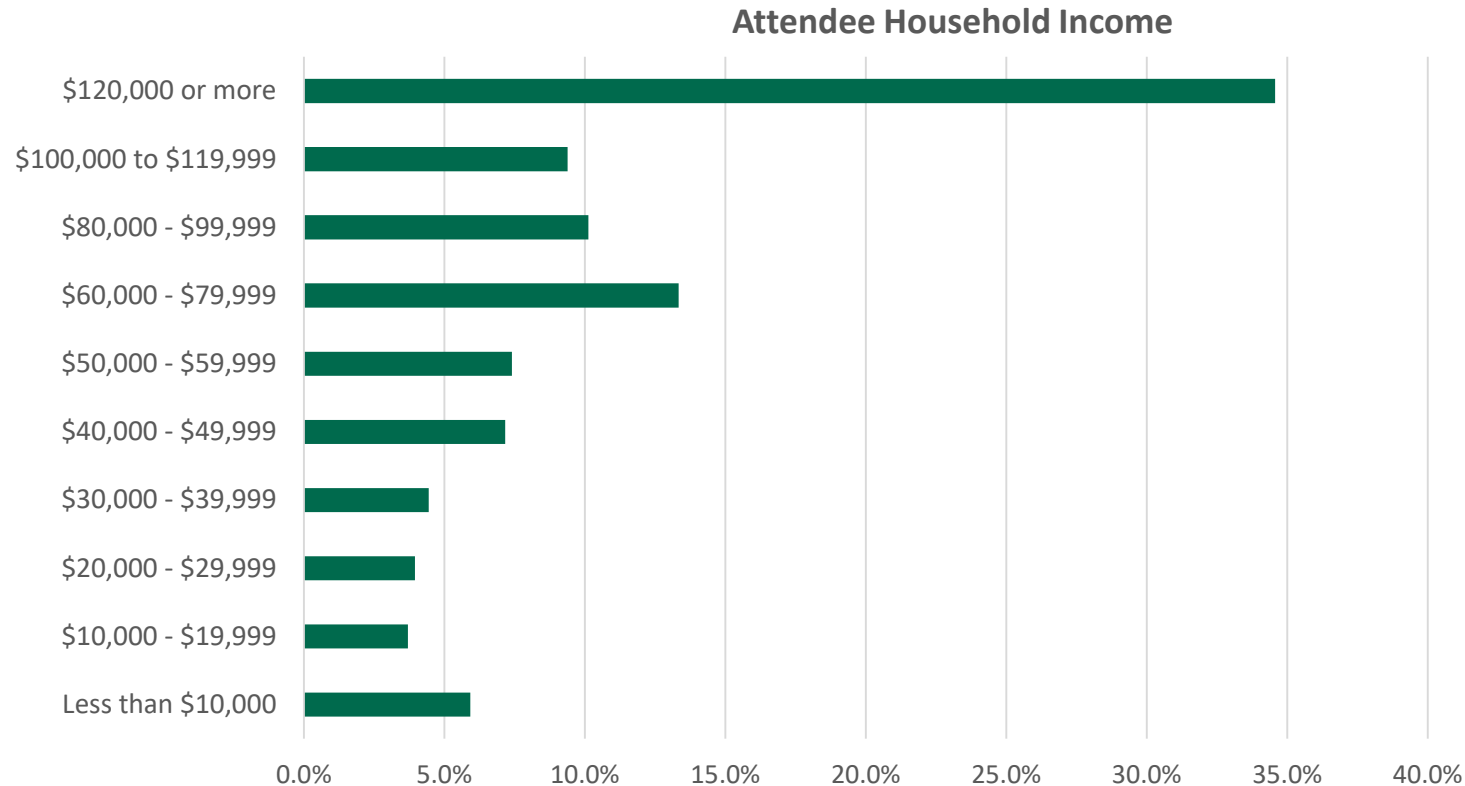


# Race of Participants





# Income Distribution of Participants



- The most represented income range among participants was \$120,000 or more – over a third of the total
- Participants with a household income of \$10,000-\$19,999 were the least common



# Distance Travelled by Participants

(for those coming from outside of the Cleveland/Akron MSA)

Distanced Traveled	Percent in 2022	Percent in 2018
Up to 250 miles	49%	34%
251 to 500 miles	36%	35%
1000 to 2,499 miles	4%	9%
2500+ miles	8%	15%
Unknown/International	3%	7%

The higher percentage of local attendees in 2022 may reflect the increase in local advertising by FRONT that year.



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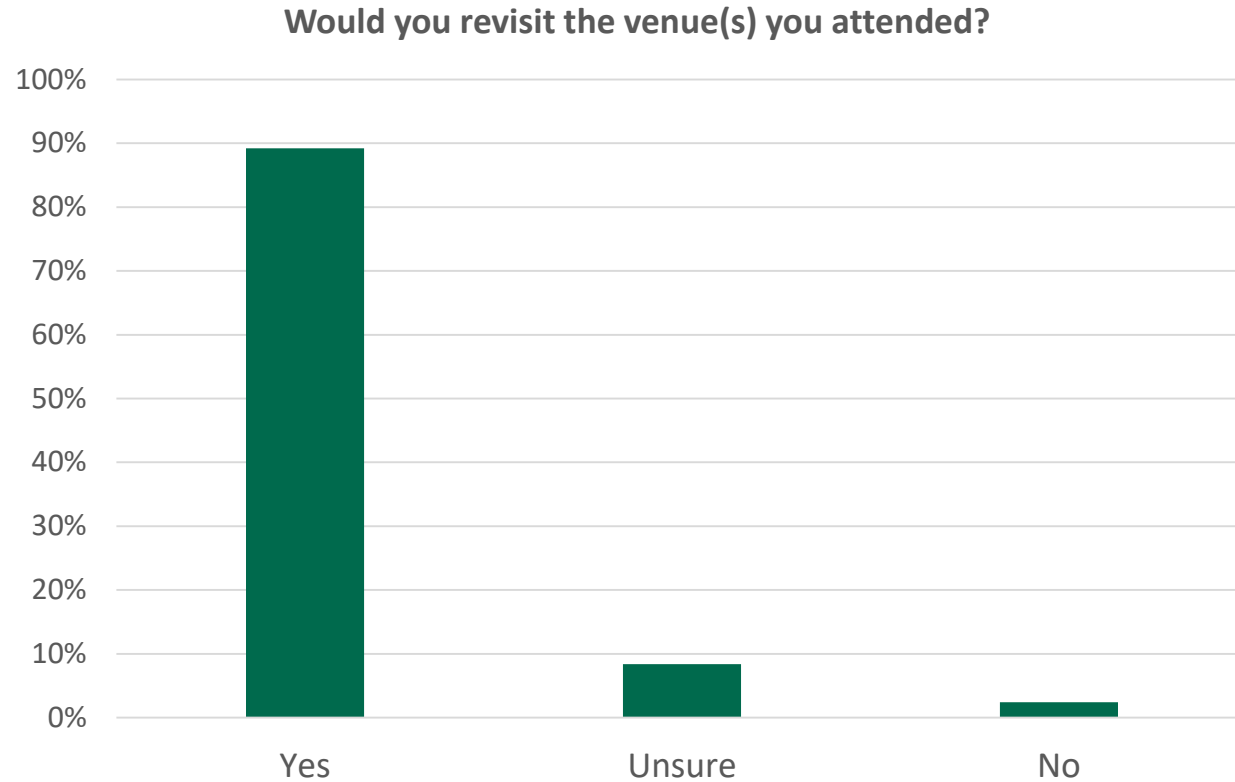
# Site Visitor Experience Rating



Rating	Percent
Exceptional	27.9%
Excellent	47.6%
Good	21.6%
Fair	2.4%
Poor	0.5%



# Interest in Revisiting



Would you revisit the venue(s) you attended?	
Response	Percent
Yes	89.2%
Unsure	8.4%
No	2.4%



# Comments from Participant Survey



# Positive Feedback

- One common theme was appreciation for the quality and diversity of the exhibit

“Loved the diversity in media and artists represented. LOVED the artist talks, the really interesting interactive works... So much to love.”

“I love the variety Front brings to our diverse art scene!”

“So impressive to see the diversity of art and artists, the use of such a range of materials.”

“It's an exciting exhibition and I hope that it continues. Each venue has unique features and I love that the art was tied into the venues in some way. The range of art, sculpture and video art is awe-inspiring.”



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# Positive Feedback

- Praise for the alternative artistic venues
- Appreciation that the event highlighted different, less well-known parts of NEO from both locals and visitors

“...So glad the time frame is generous! The spread of locations has gotten me to places I didn’t know existed e.g. the history of psychology museum!?! I’ve lived in Cleveland a long time but there are always new things to discover and this exhibition helps me do that. Thank you!”

“...I especially loved the installations at the public library and how thoughtfully they made use of the space... as a visitor to the city it was fun to get to experience a less traditional arts location like this.”

“Outstanding! It was great to see the inclusion of NEO artists. I just acquired a piece by one of the artists. I liked the venues outside of the traditional museums. Thank you for alternatives to museum space. So much of the way we see art is influenced by the curator and the exhibition space as well.”



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# Positive Feedback

- Appreciation for showcasing local art/artists
- Event inspired local pride
- The Akron Art Museum in particular received a lot of positive feedback

“I've only made it to the CPL site so far and plan to go to others. Great way to be reminded of all the great places we have in the area and have (more of?) a reason to visit them.”

“The pieces at the Akron Art Museum were inspiring. Devastating to see. I really appreciate the staff at the museum shop who asked about my experience and created a safe place for discussion. I moved away from Akron over 30 years ago and was very proud to see this show in that space upon my return.”



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# Constructive Feedback

- Overall positive feedback on the art/content – most mixed/negative reviews had to do with logistics
- Multiple comments on the overwhelming scope of the event
- Desire for clearer guidance/direction on how to make the most of a short visit (in one day or over a weekend)

“Way finding was very poor.”

“Too much for one day, hard to see everything and not a clear path to know what to do and see.”

“Loved all the exhibits. Wish there was a “suggested route” for a one day, two day visit etc. There was so much to take in and we seniors were a bit confused and to how we could do it all.”



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# Constructive Feedback

- The passport/booklet was positively received, but they ran out or weren't easy to acquire for everyone
- Website was confusing for many, could be more user-friendly and include more details on scheduling/directions

“It would have been helpful in planning to have access to the venue hours listed more clearly.”

“The website was NOT a user-friendly way to figure out what was happening where from day to day. I understand the booklets were nifty and info-packed, but they were unavailable.”

“...Wish that website was better/more developed in the months leading up to the opening so I could plan better—it was frustrating to get any helpful info in the spring...”



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# Mixed Feedback

- Expected subjective feedback on the art/content of show – some liked it or didn't; some felt it was too political while others enjoyed this, etc.
- Some felt the event felt elitist/exclusive, while others commented on the welcoming/accessible atmosphere – likely varies greatly by venue

“The locations were very inviting...”

“This show felt very exclusive...”

“The art was accessible relatable and interesting.”

“Overall, FRONT feels like an exclusive event only for elite art professionals.”

“...the staff was welcoming we were greeted with smiles and were included the entire time. It was a great feeling.”



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# Appendix A: Site Visits

Visitor Counts by Site Location			
VENUE	Estimated TOTAL Site Visit Count Provided by FRONT	Total Site Visits Used in Calculations	NOTES
Akron Art Museum	5,977	5,977	
Allen Memorial Art Museum	9,186	9,186	
Audra Skuodas Studio	47	47	
BOP STOP	177	177	
Carillon	2,557	1,033	1,524 live stream attendees were not included as they did not visit the physical site
Cleveland Clinic BioRepository	n/a	n/a	Data unavailable
CIA - Reinberger Gallery	2,156	2,156	
CIA Cinematheque	123	123	
Cleveland Clinic - Miller Family Pavilion	n/a	n/a	Data unavailable
Cleveland Museum of Art	112,632	112,632	
Cleveland Public Library	6,222	6,222	
Emily Davis Gallery	955	955	
FAVA	779	779	
JUKEBOX	345	345	
Karamu	625	625	
Lock 4	24,000	24,000	
moCa	5,095	5,095	
National Museum of Psychology at Cummings Center	843	843	
North Coast Harbor	492,000	98,400	20% of site visits were included in the total site visits and ALL of that 20% were assumed to be from visitors within the Cleveland/Akron MSA
Portal at The Justice Center	85	85	
Quaker Square	1,139	1,139	
Quincy Garden	n/a	n/a	Data unavailable
Rock Hall	115,500	28,875	25% of site visits were included in the total site visits
Samson	85,500	17,100	20% of site visits were included in the total site visits
SPACES	1,376	1,376	
Syrian Cultural Garden	1,905	1,905	
The Feve	11,700	11,700	
The Sculpture Center	1,065	1,065	
Transformer Station (FRONT PNC HUB)	3,195	3,195	
Wade Oval	40,000	40,000	
<b>TOTAL</b>	<b>925,184</b>	<b>375,035</b>	



# Appendix B: Assumptions

- We used a multiple ring buffer for travel costs for visitors from their home ZIP code:
  - If within CLE/AKR MSAs = \$30 on gas to get to destination.
  - If within 250 miles = \$62 on gas fill-up to get there (\$4.12 was average price for gallon of gas in Ohio, according to EIA for June through September 2022, fill-up assumed to be ~15 gallons,  $4.12 \times 15 = \$61.80$ ), we assume most drove this distance
  - If within 500 miles = \$156 spent (portion of \$312 ticket CLE gets) (researched plane ticket prices into Cleveland Hopkins from various parts of the country for summer months)
  - If within 1000 miles = \$203 spent (portion of \$406 ticket CLE gets)
  - If within 2500 miles = \$289 spent (portion of \$578 ticket CLE gets)
  - If within 5000 miles = \$367 spent (portion of \$735 ticket CLE gets)
- Based on the estimated number of site visits (375,035) and the average number of sites that survey respondents visited (5.6), we estimate approximately 67,000 unique visitors attended the FRONT festival. **Because this calculation is an estimate based on site visit estimates and survey responses, it should not be treated as definitive.**

# Appendix C: Differences in 2022 Study

Notes on differences in data and assumptions between 2018 and 2022 studies:

- The 2022 festival does not include all of the sites used for the 2018 festival and includes additional sites not used for the 2018 festival.
- As directed by FRONT, the 2022 study does not distinguish between “FRONT” sites and “Partner” sites. All sites are studied together and results may be compared with the “All Sites” results from the 2018 study.
- The 2022 study includes significantly fewer survey results than the 2018 study. Although efforts were made to conduct surveys in 2022, FRONT reported that issues related to recruitment/staffing of survey takers affected the number of surveys collected in 2022. Surveys also were not conducted at exactly the same sites as in the 2018 study.
- The Covid-19 pandemic has changed travel, tourism, and the economy. Differences between the pre-pandemic (2018) and post-pandemic (2022) studies may be due to this change.

# Appendix D: 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. a visitor who responded as having visited 27 sites, resulting in 39.5 hours total time each, or 6 days of expenditures)
- Because comparison baseline 2021 site visitor numbers were not provided by many venues, total number of site visitors at each site was used to calculate expenditures of all visitors, not only those attending sites due to FRONT International, with the exception of those venues outlined in Appendix A. We believe that only about 20% of site visits are due to FRONT International
- Respondents who “happened upon” FRONT International exhibits were not included in the calculations for travel expenses to and from Cleveland. However, if they visited more than one site, they were considered a captured audience and their expenses for hotel, food and other expenditures were included in calculating the economic impact. Some expenses for these visitors may be overstated, since this spending might have occurred regardless of their site visits.
- The researchers caution against direct comparison between results from the studies in 2018 and 2022 due to the distinction of “FRONT” sites and “All sites” made in the 2018 study.



# Cleveland State University

## Center for Economic Development

### **Molly Schnoke**

Interim Director

Center for Economic Development

Center for Community Planning and Development

[m.s.schnoke@csuohio.edu](mailto:m.s.schnoke@csuohio.edu)

<http://levin.urban.csuohio.edu/ced/>



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