

Economic Impacts of the Saint Augustine Amphitheatre, 2013

Sponsored Project Report to St. Johns County Government

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Aerial view of the St. Augustine Amphitheater (staugamp.sjcvenues.com)

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Executive Summary

This report details an economic impact analysis of the St. Augustine Amphitheater on St Johns County, Florida during 2013. The Amphitheater is a 16 acre multipurpose entertainment/recreational facility located 1.5 miles south of the city of St. Augustine in St. Johns County, Florida. It features a covered semi-circular concert arena seating approximately 4,000 people.

A survey was carried out to determine the characteristics and spending habits of Amphitheater attendees. Nearly 65 percent of attendees were visitors from outside St. Johns County, and thus their spending represented new final demand that generated indirect/induced multiplier effects for the County's economy. Generally, the demographic make-up of attendees was similar to the population of St. Johns County, although the percent of black and Asian racial groups attending was lower. Amphitheater attendees tended to be middle-aged, white, and college educated. Most of the survey respondents came to the area primarily to attend an Amphitheater event, although significant numbers also enjoyed downtown St. Augustine, the beaches, and other attractions in the area. About twenty percent of attendees spent one or more nights in the area with 84 percent utilizing some form of paid accommodations.

Average total spending per weighted attendee was estimated to be \$143.03. The largest component of this spending was for entertainment, averaging \$58.44 per attendee, which included Amphitheater ticket costs. Restaurants were the next largest expenditure item for attendees, averaging \$23.55 per person, followed by lodging and food stores at \$17.35 and \$9.18, respectively. Together these four items comprised over three-fourths of total average spending by Amphitheater attendees.

Estimated total spending amounts were entered into a regional economic model for St. Johns County created with the IMPLAN software and county database package to estimate the Amphitheater's impacts. Secondary (indirect and induced) impacts were estimated only for tourist attendees while direct impacts were estimated for local attendees. Total spending was extrapolated based on total attendance to the Amphitheater of 99,608 in 2013, including 20,559 children who were given half the statistical weight of adults for the purposes of impact analysis.

Summary economic impacts for the Amphitheater are presented in Table ES1. Types of impacts are shown in columns with the direct, indirect and induced impact effects for local and tourist attendees given in table rows. Impacts of the Amphitheater for St. Johns County in 2013 were estimated at \$17.3 million in industry output (revenues) and \$10.4 million in value added. Total value-added is equivalent to Gross Domestic Product (GDP), which for St Johns County in 2012 was reported as \$5,606 million, so the Amphitheater impacts represented about 0.19 percent of the County's economy. Total labor income impacts (employee compensation and benefits and proprietor income) were estimated at \$6.2 million, and other property income impacts (dividends, interest payments, rents, royalties, corporate profits, etc.), totaled \$2.7 million. Indirect business tax impacts, which include excise, sales and property taxes, as well as, fees, fines, licenses and permits, but not income taxes, totaled \$1.5 million in 2013. The estimated employment impacts of the Amphitheater for St. Johns County in 2013 were

207 fulltime and part-time jobs. Total employment in St Johns County in 2012 was 77,683 fulltime and part-time jobs, so the Amphitheater’s employment impacts represented about 0.27 percent of total County employment.

About three-quarters of the Amphitheater’s total economic impacts were attributable to non-local visitors (tourists) as a result of both the high percentage of tourist attendees and the secondary impacts attributable to their new dollars entering the County’s economy.

Table ES1. Summary of economic impacts of attendee spending for the St. Augustine Amphitheater, 2013

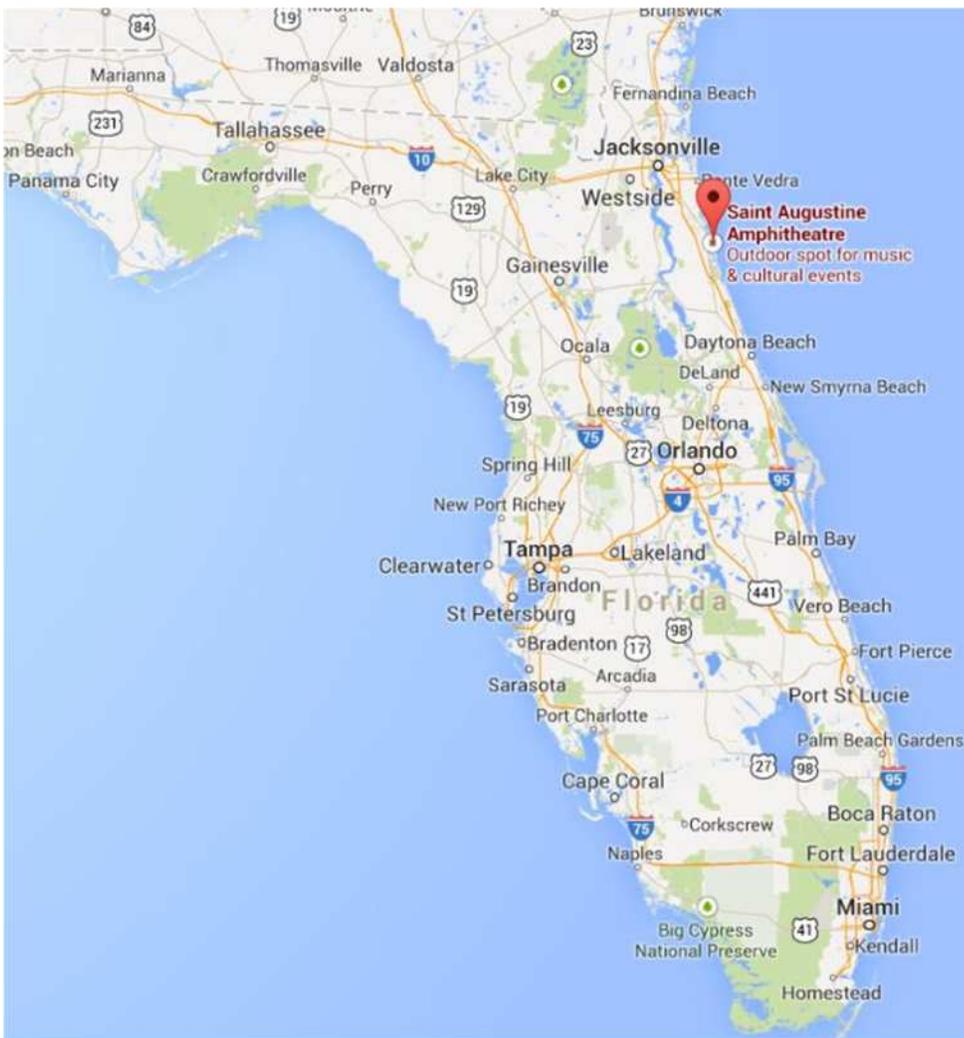
Impact Effect / level	Output (\$1,000)	Total value added (\$1,000)	Labor income (\$1,000)	Other property income (\$1,000)	Indirect business taxes (\$1,000)	Employ- ment (Jobs)
Direct Local	3,768	2,121	1,273	456	392	52
Direct Tourist	6,870	3,865	2,321	831	714	94
Indirect Tourist	2,120	1,287	786	410	90	19
Induced Tourist	4,571	3,106	1,835	1,010	261	42
Total	17,329	10,379	6,215	2,707	1,457	207

Monetary values expressed in 2013 dollars. Employment represents full-time and part-time jobs.

Introduction

The St. Augustine Amphitheater (Amphitheater) is a 16 acre multipurpose entertainment/recreational facility located about 1.5 miles south of the city of St. Augustine (Figures 1 through 5) and adjacent to Anastasia State Park in St. Johns County, Florida. Originally constructed in 1965, the facility went through a major renovation that was completed in 2007. It features a covered semi-circular concert arena that seats approximately 4,000 people. It also includes a conference room, concession stands, a merchandise area, a large plaza, and walking trails. It is frequently used for live music concerts and a farmers' market, and less frequently for festivals, exhibitions, movie presentations, theatrical performances, and an ice skating rink during the winter holiday festival (St. Augustine Amphitheater website). The Amphitheater is managed by the St. Johns County Cultural Events Division and had operating budget of \$5 million for FY 2012-13. The amphitheater holds 25 to 30 large concerts annually (Table 1), where 150 to 200 temporary employees and vendors are typically hired.

Figure 1. Map of location of the St Augustine Amphitheater in St Augustine, Florida



Source: Google maps

Figure 2. Main stage and first and second tier seating areas, St. Augustine Amphitheater



Figure 3. Third tier seating area, St. Augustine Amphitheater



Figure 4. Main entrance and concession area, St Augustine Amphitheater



Figure 5. Parking area, St Augustine Amphitheater



Methods and Data

Visitor Survey

Characteristics and spending by Amphitheater attendees were documented through and personal interview survey. The survey questionnaire was developed by the project investigators in consultation with Amphitheater management and the Florida Survey Research Center (FSRC). The questionnaire was designed to be brief because attendees would be intercepted on site immediately before or after a performance. The instrument and interview protocol were approved by the University of Florida Institutional Review Board for compliance with federal law on human subjects research. Attendees who completed their interviews were given a voucher worth one free drink at the event concession stands. Data was requested on: the type and length of stay, type of accommodations if applicable, purpose of visit to area, party size, expenditures in eleven different categories, home zip code, age, race education, gender, and general comments. A copy of the questionnaire is provided in Appendix B.

Interviews were conducted at 30 different events from December 2012 through November 2013. Thirty Amphitheater volunteers served as interviewers, who were trained and coordinated by the Florida Survey Research Center (FSRC). Three interviewers were assigned to each event and each was requested to completed one randomly selected interview per hour, over a five to eight hour shift. Bilingual interviewers (English/Spanish) were available in case of Spanish speaking subjects. On average, 26.6 interviews were completed at each event during the regular concert season (March-November), with a maximum of 44 and minimum 14. In addition, some 137 interviews were conducted during the *Winter Wonderland* holiday festival in December-January. Survey data were screened and entered for analysis by FSRC. A total of 909 interviews were successfully completed and used for the statistical and economic analysis.

Event Attendance

There were 42 paying events held at the Amphitheater in calendar year 2013 beginning in early March and going through December (Table 1). Most of the paying events were live music performances, interspersed with an Oktoberfest, a local restaurant food festival, and a fitness exhibition. According to data from Amphitheater management, total ticket sales were 107,882 for events in 2013, and actual attendance for these events totaled 99,608, or averaging 2,372 per event. Actual attendance figures were used for the economic analysis. Amphitheater attendance in 2013 was made up of 79,049 adults (79.4%) and 20,559 children (20.6%) as shown in Table 2. For purposes of estimating economic impacts, attendance by children was weighted as one-half of an adult, so total weighted attendance was calculated at 89,328. Survey results indicate that 64.6 percent of attendees lived outside of St. Johns County (referred to as tourists as per State Statute 125.0104)¹. Thus there were an estimated 57,685 (weighted) tourist attendees to the Amphitheater in 2013. In economic impact analysis, spending by tourists represents new final demand and generates multiplier or ripple effects for the local economy.

¹ State Statute 125.0104 says: "Tourist" means a person who participates in trade or recreation activities outside the county of his or her permanent residence or who rents or leases transient accommodations as described in paragraph (3)(a).

Table 1. Ticket sales and attendance by event at the St. Augustine Amphitheater in 2013

Day of week	Date	Event	Tickets sold	Actual Attendance
Fri.	3/1/2013	Hall & Oates	3,891	3,617
Fri.	3/15/2013	Juan Siddi Flamenco	377	301
Sat.	3/16/2013	Juan Siddi Flamenco	670	569
Sun.	3/17/2013	Matchbox 20	3,923	3,680
Fri.	3/22/2013	Yo Gabba Gabba	2,057	1,881
Sun.	4/7/2013	Chicago	3,440	3,229
Sun.	4/14/2013	Third Day	2,526	2,227
Sat.	4/27/2013	Epic Taste of St. Augustine	1,954	1,954
Thu.	5/2/2013	Smashing Pumpkins	3,241	2,747
Fri.	5/3/2013	REO Speedwagon, Ted Nugent & Styx	3,832	3,413
Sat.	5/4/2013	Gamble Rogers Folk Fest.	314	314
Sun.	5/5/2013	Bob Dylan	4,055	3,801
Fri.	5/10/2013	Eddie Palmieri Jr	488	418
Sat.	5/11/2013	Imagine Dragons	4,027	3,768
Fri.	5/17/2013	Alan Jackson	3,740	3,547
Sat.	5/25/2013	Galaxy Fitness Competition	142	142
Sun.	5/26/2013	Steve Martin & the Steep Canyon Rangers	3,445	3,241
Sat.	6/1/2013	Peter Frampton	1,934	1,743
Fri.	6/7/2013	LL Cool J	2,606	2,303
Wed	6/12/2013	Billy Idol	2,571	2,428
Wed	6/19/2013	Kendrick Lamar	2,056	1,871
Fri.	6/21/2013	Earth, Wind & Fire	3,219	3,041
Sat.	7/6/2013	Big Time Rush	3,246	2,857
Sat.	7/20/2013	Sublime with Rome	2,972	2,640
Fri.	7/26/2013	The Monkees	1,848	1,606
Fri.	8/9/2013	Alabama	3,942	3,720
Fri.	8/16/2013	Victoria Justice	1,842	1,670
Thu.	8/22/2013	Slightly Stoopid	2,343	2,222
Sun.	9/8/2013	Steely Dan	4,005	3,768
Sun.	9/22/2013	Rebelution	2,484	2,269
Thu.	10/3/2013	Brian Wilson & Jeff Beck	1,774	1,580
Sat.	10/5/2013	The Black Crowes	3,173	2,888
Fri.	10/18/2013	The Lumineers	3,885	3,743
Sat.	10/19/2013	Oktoberfest	1,414	1,471
Sat.	10/26/2013	John Fogerty	3,698	3,471
Sat.	11/2/2013	Barenaked Ladies	1,882	1,685
Fri.	11/8/2013	Passion Pit	2,611	2,447
Sat.	11/9/2013	Justin Moore	3,441	3,287
Fri.	11/15/2013	The Avett Brothers	3,783	3,485
Sat.	11/16/2013	OAR	2,249	1,985
Sat.	12/21/2013	Dinner & A Movie - 'It's a Wonderful Life'	82	82
Sat.	12/7/2013	Alabama Shakes	2,700	2,497
Total			107,882	99,608

Table 2. Summary of attendance by adults and children, and tourists, St. Augustine Amphitheater, 2013

Total attendance (unweighted)	99,608
Adults	79,049
Children	20,559
Weighted attendance (1/2 for children)	89,328
Share of tourist attendees (from outside St. Johns County)	64.6%
Weighted tourist attendance	57,685
Weighted local attendance	31,643

A time series analysis was conducted to evaluate the relationship between Amphitheater attendance and sales at tourism related businesses within St Johns county between 2008 and 2013. Data was obtained from the Florida Department of Revenue for 21 different “Kind codes” or business types related to recreation and tourism (Florida Department of Revenues, Office of Tax Research). Regression analysis of the data did not detect any measurable relationship between Amphitheater attendance and St. Johns County gross sales data (Appendix C). This most likely is due to the fact that Amphitheater activities only represent a small fraction of total economic activity in the County.

Regional Economic Analysis

General description of Input-Output Analysis

The economic impacts (or contributions) generated by the Amphitheater were estimated using a technique known as **input-output (I-O) analysis** (Miller and Blair, 2009). Input-output models are a standard approach to estimating economic impacts or contributions resulting from a change in the economic activity of one or more specific industry sectors or institutions in a specific geographic region. Input-output models primarily consist of a large set of equations and a Social Accounting Matrix (SAM) that mathematically represents the structure of a local economy and the transactions that occur between industries, employees, households, and governments within it. The I-O analysis for the Amphitheater was carried out using **IMPLAN®** (IMPLAN Group, LLC, 2012), a commercial computer software and data package for building input-output models. Once constructed, these models can be used to estimate detailed economic multipliers and impacts for a wide variety of events or activities specific to the economy of a particular region.

IMPLAN multipliers

The source and destination of revenues and/or expenditures associated with an economic activity in a particular region are important to accurately evaluate their economic impacts on that region. **Direct economic impacts** take place in a region when an economic activity results in sales, income, and/or employment for local or regional businesses and institutions (including households) inside the study area. When local goods, services, and

employment are purchased for an activity with dollars that originate from outside the region, then indirect and induced multiplier effects from subsequent rounds of spending within that economy continue to contribute to the activity's economic impact. **Indirect multiplier effects** occur when directly affected local-businesses purchase locally produced supplies to carry out their activities, while **induced multiplier effects** occur when households of owners and employees of directly and indirectly affected local businesses and government entities spend their earnings at other local businesses in the area. The total economic impacts of an event or activity that brings in outside or new dollars to the local economy equals the sum of the direct, indirect, and induced impacts. For economic activities of local residents from St. Johns County, however, only the direct effects are counted as impacts or contributions since dollars are just being transferred between different accounts within the same local economy. Also, when any business purchases inputs (including labor), or consumer goods and services are purchased from outside the local economy, then dollars are a "leakage" and do not contribute to local economic impacts. This results in a reduction in direct and secondary economic impacts. In addition, purchases of goods from retail establishments are margined to estimate the share of spending attributable to local businesses as opposed to non-local manufacturers. This is why the location, nature, and magnitude of the transactions involved in Amphitheater activities are important in making an accurate estimate of its economic importance to the County.

The IMPLAN I-O model used for this analysis was constructed using the Commodity Trade Flows methodology, and included social accounts for households, local/state and federal governments in the SAM. The **total economic contributions or impacts** of an activity represent the sum of direct, indirect and induced effects. Economic multipliers were estimated for **output** or revenues, **Gross Domestic Product (value added)**, **employment** (fulltime and part-time jobs), **wages** (labor income, including employee compensation, benefits and business proprietor or owner income) and various **government taxes**. The magnitude of multipliers depends on the mix of industries and institutions in the local economy, and the share of intermediate inputs to different sectors that are sourced locally. Multipliers used in this study are shown in Table 3. Output multipliers are largest because they cover all types of transactions related to the activity at it ripples through the economy. Value added, labor income, and business tax multipliers apply to smaller subsets of that business activity. Employment multipliers are denominated in jobs per million dollars final demand.

Spending by non-local attendees/visitors to the Amphitheater was assumed to represent new final demand to the county, so that indirect and induced multiplier effects apply, however, only direct effects were counted for spending by local residents in estimating the total economic impacts of the Amphitheater.

Table 3. Selected IMPLAN regional economic multipliers for St. Johns County, Florida

Sector Number	Sector Name	Output	Value Added	Labor Income	Indirect Business Taxes	Employment
		----- Dollars per Dollar Revenue -----				Jobs per million dollars
324	Retail Stores - Food & beverage	1.96356	1.35624	0.88974	0.20745	26.8605
326	Retail Stores - Gasoline stations	1.93405	1.39752	0.83854	0.21657	21.7340
327	Retail Stores - Clothing & accessories	1.93506	1.27434	0.69016	0.20454	23.7685
329	Retail Stores - General merchandise	1.91702	1.42439	0.85983	0.19590	25.8666
330	Retail Stores - Miscellaneous	1.87785	1.40921	0.79239	0.16122	28.1124
338	Sightseeing transp. & support activities	1.90346	1.20580	0.93484	0.09123	17.6190
362	Automotive equipment rental & leasing	1.95955	1.24624	0.55373	0.27996	14.0797
404	Promoters of performing arts & sports	2.07073	1.21265	0.72184	0.15816	25.1373
410	Other amusement & recreation industries	1.87231	1.31092	0.89421	0.09090	24.7445
411	Hotels & motels, including casino hotels	1.95250	1.20906	0.66245	0.17750	17.5229
413	Food services & drinking places	1.80254	1.12875	0.71298	0.12417	23.6044
422	Other personal services	1.96702	1.15876	0.81718	0.09763	18.7977

Values represent total multipliers, including direct, indirect and induced effects.

Source: IMPLAN software and 2012 data for St. Johns County (IMPLAN Group, LLC, 2013).

Event specification

The survey instrument was designed to collect detailed data on the types and amounts of spending by Amphitheater attendees. Survey respondents selected dollar ranges for each spending type or category that applied to their visit. The types of spending covered included: restaurants; food stores; lodging; car rental; gasoline; parking and beach access; bus, taxi, and tours; entertainment; other recreation such as fishing, boating, and cycling; shopping; and miscellaneous “other” expenses. The spending in these categories was allocated to IMPLAN industry sectors commonly used for tourism related studies. Average weighted per-person spending for each category was calculated for the survey sample using range midpoints, then total spending for each category/IMPLAN sector was then calculated by multiplying the average spending for each category by the weighted attendance of local and tourist attendees. Spending at food stores, gas stations, shopping and other retail stores were treated so that only the gross retail margin applied toward Amphitheater impacts.

Survey Results

Attendance and Visitor Profile

Demographics: geographic origin, gender, age, race, education, trip purpose, party size.

Survey respondents were asked a variety of questions regarding various demographic attributes including gender, age, race, and educational attainment. Analysis of attendee demographics and other characteristics (except spending) was not weighted. Generally, Amphitheater attendees were college educated, middle- to older-age, white adults, with slightly more than half being female. When compared to 2012 American Community Survey data, Amphitheater attendees were quite similar to the population of St. Johns County, although attendees tended to be somewhat more middle-aged and educated, and the racial makeup of Attendees was slightly more White than for the County, while the percentage of Black and Asian attendees was significantly lower than in the County (Table 4).

Table 4. Demographic characteristics of survey respondents at St. Augustine Amphitheater compared to the population of St Johns County, FL

Demographic Characteristic	Number Respondents	Percent of Respondents	St. Johns County Population Percent ¹
Gender			
Male	415	45.7%	46.3%
Female	477	52.5%	53.7%
NA	17	1.9%	N/A
Total	909	100.0%	100.0%
Age Group²			
15-24	77	8.5%	14.3%
25-34	127	14.0%	12.4%
35-44	214	23.5%	16.1%
45-54	213	23.4%	18.7%
55-64	183	20.1%	17.8%
65-74	73	8.0%	12.2%
75-84	6	0.7%	5.7%
85-94	1	0.1%	2.8%
(missing)	15	1.7%	N/A
Total	909	100.0%	100.0%
Race			
White	812	89.3%	84.8%
African American/Black	35	3.9%	5.2%
Native American	10	1.1%	0.2%
Pacific Islander	5	0.6%	0.0%
Hispanic/Latino	52	5.7%	5.7%
Asian	4	0.4%	2.0%
Other race/multiple ³	7	0.8%	2.1%
Refused	3	0.3%	N/A
Total ³	928	102.1%	100.0%
Education			
Primary school	6	0.7%	6.9%
High school or GED	133	14.6%	21.1%
Vocational/technical school	19	2.1%	N/A
Some college	142	15.6%	20.6%
College degree (assoc., bach.)	402	44.2%	36.5%
Graduate/Professional degree	201	22.1%	14.8%
Refused	2	0.2%	N/A
(missing)	4	0.4%	N/A
Total	909	100.0%	99.9%

¹ U.S. Census Bureau, 2012 American Community Survey, 1-Year Estimates, for St. Johns Co., FL.

² Percent of County population 15 years of age and older

³ Survey respondents could not specifically indicate a multiple race category – instead they selected more than one individual race, resulting in a total percentage of race greater than 100.

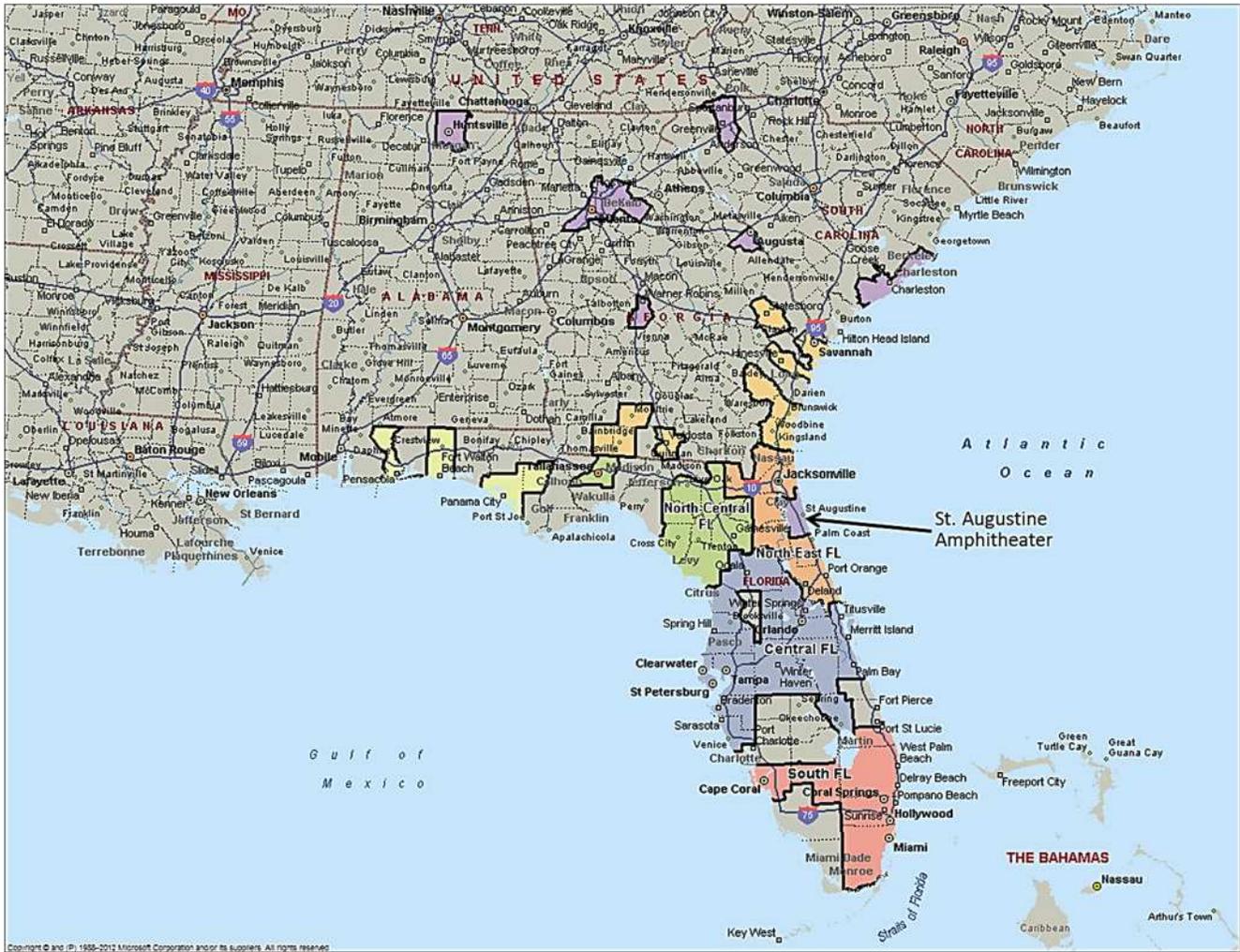
State-County Origin

Just over one-third (35.4%) of survey respondents indicated that they resided within St. Johns County and thus constituted local visitors to the facility, and 64.6 percent of respondents were non-county residents or tourists (Table 5). These percentages were used to estimate the local and tourist spending and economic impacts associated with the Amphitheater. Looking at the other places of origin among survey respondents, over three-fourths (76.3%) resided within northeast Florida (including St Johns County). The Northeast Florida region includes seven counties, five of which are on the Atlantic coast. About nine percent of respondents reported coming from central Florida to attend Amphitheater events, while only 5.8 percent of survey respondents were from outside Florida, with over half of those originating from Georgia (Table 5, Figure 6).

Table 5. Geographic origin of survey respondents, St. Augustine Amphitheater, 2013

Region	Count	Percent
St. Johns County Florida	322	35.4%
Northeast Florida (excl. St. Johns Co.)	372	40.9%
North central Florida	39	4.3%
Central Florida	84	9.2%
South Florida	17	1.9%
Northwest Florida	7	0.8%
Southeast Georgia	20	2.2%
Rest of Georgia	8	0.9%
Rest of Southeastern U.S.	3	0.3%
Rest of U.S.	22	2.4%
(missing)	15	1.7%
Total	909	100.0%

Figure 6. Map of region and county origin of survey respondents, by, St. Augustine Amphitheater, 2013



Primary Purpose of Trip and Other Activities

Nearly 83 percent of interviewed attendees indicated that the Amphitheater event was the primary purpose for their trip to the area (Table 6). Note that respondents could claim more than one primary purpose. Other primary purposes given by Amphitheater attendees included: visiting downtown St. Augustine, going to the beach, shopping, visiting other attractions, attending sporting events, and going fishing in the area.

Table 6. Purpose of trip and other activities, St. Augustine Amphitheater survey results, 2013

Primary Purpose of Trip	Count	Percent
Amphitheater event	752	82.7%
Other	139	15.3%
Don't know	1	0.1%
No answer	17	1.9%
Grand Total	909	100.0%
Other Primary Purpose	Count	Percent
Downtown St. Augustine	98	70.5%
Beach	60	43.2%
Attractions	33	23.7%
Fishing	10	7.2%
Sporting event	5	3.6%
Boating	6	4.3%
Convention/conference	1	0.7%
Personal event	6	4.3%
Shopping	57	41.0%
Other	20	14.4%
Total	139	100%

The most frequently reported party size in the survey sample was two, representing 59.3 percent of respondents (Table 7). Singles were the next most common reported party size (15.6%), followed by groups of three and four, both at 9.4 percent, respectively, and groups of more than 6 represented 2.3 percent.

Table 7. Party size, St. Augustine Amphitheater survey results, 2013

Party Size	Count	Percent
1	142	15.6%
2	539	59.3%
3	85	9.4%
4	85	9.4%
5	18	2.0%
6	16	1.8%
More than 6	21	2.3%
(missing)	3	0.3%
Total	909	100.0%

Type of Stay and Accommodations

Over three-fourths of survey respondents indicated that their attendance at the Amphitheater event was part of a single day-trip, while just over twenty percent of respondents planned to stay overnight in the area (Table 8). The remainder didn't know or refused to answer. Of the respondents staying overnight, the most frequently reported length of stay was one night (48%). Generally, longer lengths of stay were reported at progressively smaller frequencies (Table 9).

Table 8. Type of trip, St. Augustine Amphitheater survey results, 2013

Type of Trip	Count	Percent
Day trip	712	78.3%
Overnight stay	185	20.4%
Don't know	1	0.1%
(missing)	11	1.2%
Total	909	100.0%

Table 9. Length of stay for overnight attendees, St. Augustine Amphitheater survey results, 2013

Number of Nights Stayed	Count	Percent of attendees	Percent of overnight attendees
1	85	9.4%	48.3%
2	47	5.2%	26.7%
3	21	2.3%	11.9%
4	6	0.7%	3.4%
5 or more	17	1.9%	9.7%
Total overnight	176	19.4%	100.0%
(missing)	733	80.6%	N/A
Grand Total	909	100.0%	100.0%

The predominant type of accommodation used by survey respondents who reported staying overnight in the area was hotels or motels, at 60.1 percent (Table 10). Significantly smaller percentages stayed at bed and breakfasts, condos or apartments, or campgrounds. Nearly 14 percent reported staying with friends or family in the area. The proportion of respondents using any form of paid accommodations to stay overnight was 84 percent.

Table 10. Type of accommodations used by overnight visitors to St. Augustine Amphitheater, 2013

Type of Accommodations	Count	Percent
Hotel/Motel	110	60.1%
Bed & breakfast	10	5.5%
Condominium/apartment	19	10.4%
Campground	15	8.2%
Stay with friends/family	25	13.7%
Don't know/Refused	1	0.5%
Other	3	1.6%
Total paid accommodations	154	84.2%
Grand total	183	100.0%

Visitor Spending

Based on survey results, the average spending per person (weighted for adults/children) by Amphitheater attendees was \$143.03 (Table 11). The largest expenditures category was “Entertainment” at \$58.44, which included Amphitheater ticket sales, and represented 40.9 percent of total expenditures. Restaurants constituted the second largest spending category, at \$23.55 per person, or 16.5 percent of average total spending, followed by Lodging (\$17.35, 12.1%), Shopping (\$11.34, 7.9%), Food Stores (\$9.18, 6.4%), and Gas Stations (\$8.79, 6.1%). The remaining five spending categories represented about \$14.38 combined or 10 percent of the total budget. Average total lodging expenditures per overnight party was \$246.68.

Table 11. Estimated average spending per attendee at St. Augustine Amphitheater, 2013

Expense Item	Spending Amount
Restaurants	\$23.55
Food stores	\$9.18
Lodging	\$17.35
Car rental	\$2.42
Gas	\$8.79
Parking/beach access	\$4.48
Bus/taxi/tours	\$0.92
Entertainment: attractions, concerts, movies	\$58.44
Recreation: fishing, boating, cycling	\$1.93
Shopping: clothing, gifts, etc.	\$11.34
Other	\$4.63
Total	\$143.03

Note: amounts weighed for adults/children in attendance; missing values were treated as zeroes; estimates represent the mid-point of ranges of values.

To estimate the economic impacts of Amphitheater attendee expenditures, the expenditure amounts were allocated to the appropriate IMPLAN sectors and multiplied by the estimated weighted total number of local (31,643) and tourist (57,685) attendees. The results of this multiplication are given in Table 12. Total spending by local attendees was estimated at \$4.53 million, and based on national averages for each specific economic sector, the revenues generated by this local spending would directly create 52 jobs for St Johns County. For tourist Amphitheater attendees, total spending was estimated at \$8.25 million, which translates to direct 94 jobs. The distribution of spending across the different sectors for local and tourist attendees reflects the budget values shown in Table 11. Values for IMPLAN retail sectors 324, 326, 327, 329, and 330 were margined so that only the retail gross margins on revenues were counted toward Amphitheater impacts.

Table 12. IMPLAN event values and imputed direct employment associated with spending by local and tourist visitors to St. Augustine Amphitheater, 2013

Sector No.	IMPLAN Sector Description	Local Visitors		Tourist Visitors	
		Value (\$)	Employment (jobs)	Value (\$)	Employment (jobs)
413	Food services & drinking places	745,174	12	1,358,439	22
324	Retail Stores - Food & beverage	290,616	1	529,788	3
411	Hotels & motels, including casino hotels	549,082	5	1,000,966	8
362	Automotive equipment rental & leasing	76,471	0	139,406	1
326	Retail Stores - Gasoline stations	278,003	0	506,794	1
422	Other personal services	141,778	1	258,459	2
338	Sightseeing transp. & support activities	28,963	0	52,799	0
404	Promoters of performing arts & sports	1,849,280	27	3,371,203	49
410	Other amusement & recreation industries	61,124	1	111,428	2
327	Retail Stores - Clothing & accessories	179,443	1	327,121	2
330	Retail Stores - Miscellaneous	179,443	2	327,121	3
329	Retail Stores - General merchandise	146,621	1	267,287	1
	Total	<u>4,525,998</u>	<u>52</u>	<u>8,250,811</u>	<u>94</u>

Notes: All monetary values are expressed. Employment numbers were imputed from industry/sector averages in IMPLAN.

Economic Impact Results

Summary Impacts

The estimated economic contributions of the St. Augustine Amphitheater are summarized in Table 13. All results are given in 2013 dollars or jobs. The types of economic impacts reported include industry output (revenue), value-added (GDP), labor income, other property income, indirect business taxes, and employment. Industry output impacts equal the total revenue changes experienced by local businesses due to activities associated with the Amphitheater. Output is also equal to total value-added plus the total value of intermediate inputs. Value-added impacts equal the sum of labor income, other property income, and indirect business taxes generated by the Amphitheater. The output and value added impacts are separate measures and should not be added together. Employment impacts are reported as jobs, including both full and part-time jobs (not full time equivalent). More detailed definitions of these terms are given in the Glossary in Appendix A.

Table 13. Summary of economic impacts of visitor spending at St. Augustine Amphitheater, 2013

Impact Type	Industry Output	Total Value Added	Labor Income	Other Property Income	Indirect Business Taxes	Employment
Impact Effect/level	(\$1,000)	(\$1,000)	(\$1,000)	(\$1,000)	(\$1,000)	(Jobs)
Direct Local	3,768	2,121	1,273	456	392	52
Direct Tourist	6,870	3,865	2,321	831	714	94
Indirect Tourist	2,120	1,287	786	410	90	19
Induced Tourist	4,571	3,106	1,835	1,010	261	42
Total	<u>17,329</u>	<u>10,379</u>	<u>6,215</u>	<u>2,707</u>	<u>1,457</u>	<u>207</u>

Monetary values expressed in 2013 dollars. Employment represents fulltime and part-time jobs.

The total output impacts of the Amphitheater for St. Johns County in 2013, including secondary indirect and induced economic effects, are estimated at \$17.3 million and value added impacts are estimated at \$10.4 million (Table 14). The Gross Domestic Product of St Johns County in 2012 was \$5,606 million (IMPLAN), thus the value added impacts of the Amphitheater represented about 0.19 percent of the overall County economy. Total labor income impacts, including employee compensation and proprietor income, are estimated at \$6.2 million. Other property income impacts, including dividends, interest payments, rents and corporate profits, totaled \$2.7 million. Indirect business tax impacts from the Amphitheater, which include excise, sales and property taxes, as well as, fees, fines, licenses and permits, but not income taxes, are estimated at \$1.5 million. The estimated employment impacts of the Amphitheater for St. Johns County in 2013 were 207 full and part-time jobs. The total employment in St Johns County in 2012 was 77,683 jobs, so the Amphitheater's employment impact represents nearly 0.27 percent of total County employment.

About three-quarters of the Amphitheater’s total economic impacts came from tourist attendees, as a result of both the high percentage of tourist attendees, and the indirect and induced multiplier effects attributable to the new dollars brought into the County’s economy.

Detailed economic impacts by major industry group (NAICS) are presented in Table 14. The sectors experiencing the greatest employment impacts from the Amphitheater were Arts/Entertainment/Recreation (84 jobs), Accommodation and Food Services (52 jobs), and Retail Trade (21 jobs). In addition, large value added impacts were realized in Real Estate/Rentals, Construction, Finance/Insurance and Professional/Scientific/Technical Services sectors. Notably, 41 percent of the total job impacts occurred in the Arts/Entertainment/Recreation sector in which the Amphitheater itself is classified.

Table 14. Detailed economic impacts for by major industry group, St. Augustine Amphitheater, 2013

Major Industry Group (NAICS)	Output (\$1,000)	Total Value Added (\$1,000)	Labor Income (\$1,000)	Other Property Income (\$1,000)	Indirect Business Taxes (\$1,000)	Employment (Jobs)
11. Agric., Forestry, Fishing, Hunting	4	2	2	1	0	0
21. Mining	13	1	1	0	0	0
22. Utilities	99	71	10	38	23	0
23. Construction	516	230	163	62	4	3
31-33. Manufacturing	38	11	10	1	0	0
42. Wholesale Trade	242	164	91	37	36	1
44-45. Retail Trade	1,310	961	590	184	188	21
48-49. Transport. & Warehouse	146	86	78	3	5	1
51. Information	246	124	51	51	22	1
52. Finance & Insurance	701	397	268	121	8	4
53. Real Estate & Rental	1,257	942	104	682	156	4
54. Profess., Scientific, Tech. Services	546	376	260	103	13	5
55. Management of Companies	97	29	10	14	5	1
56. Administrative & Waste Services	359	228	180	45	3	6
61. Educational Services	99	58	48	7	4	2
62. Health & Social Services	522	324	298	16	10	6
71. Arts, Entertainment & Recreation	5,764	3,021	1,748	693	580	84
72. Accommodation & Food Services	3,992	2,341	1,441	521	379	52
81. Other Services	627	358	316	16	26	7
92. Government & non NAICS	750	655	549	112	-6	10
Total	<u>17,329</u>	<u>10,379</u>	<u>6,215</u>	<u>2,707</u>	<u>1,457</u>	<u>207</u>

Monetary values expressed in 2013 dollars. Employment represents fulltime and part-time jobs. Industries classified according to the North American Industry Classification Scheme (NAICS).

Tax Impacts

Detailed tax impacts of the Amphitheater are presented in Table 15. These tax impacts are larger than the indirect business tax impacts shown in previous tables because they also include taxes on income and profits. Local, state and federal tax impacts from Amphitheater operations in 2013 were estimated at \$2.7 million. Nearly \$1.4 million or 54 percent of these tax impacts occurred at the State and Local level, while \$1.2 million (46%) occurred at the Federal level. Among the large state/local tax impacts were sales tax (\$709,260) and property tax (\$553,875).

Table 15. Detailed state/local and federal tax impacts of the St. Augustine Amphitheater, 2013

Tax Item Description	Value (\$)	Percent
State & Local Tax Impacts		
Dividends	587	0.02%
Social Ins Tax- Employee Contribution	4,097	0.15%
Social Ins Tax- Employer Contribution	8,056	0.30%
Tax on Production & Imports: Sales Tax	709,260	26.71%
Tax on Production & Imports: Property Tax	553,875	20.86%
Tax on Production & Imports: Motor Vehicle Lic.	13,027	0.49%
Tax on Production & Imports: Severance Tax	1,484	0.06%
Tax on Production & Imports: Other Taxes	69,225	2.61%
Tax on Production & Imports: S/L NonTaxes	14,886	0.56%
Corporate Profits Tax	10,427	0.39%
Personal Tax: Income Tax	0	0.00%
Personal Tax: NonTaxes (Fines- Fees)	31,656	1.19%
Personal Tax: Motor Vehicle License	7,600	0.29%
Personal Tax: Property Taxes	3,038	0.11%
Personal Tax: Other Tax (Fish/Hunt)	487	0.02%
Total State & Local Tax	<u>1,427,705</u>	<u>53.76%</u>
Federal Tax Impacts		
Social Ins Tax- Employee Contribution	268,014	10.09%
Social Ins Tax- Employer Contribution	296,204	11.15%
Tax on Production & Imports: Excise Taxes	63,218	2.38%
Tax on Production & Imports: Custom Duty	25,063	0.94%
Tax on Production & Imports: Fed NonTaxes	7,182	0.27%
Corporate Profits Tax	88,278	3.32%
Personal Tax: Income Tax	479,990	18.07%
Total Federal Tax	<u>1,227,949</u>	<u>46.24%</u>
Total Federal, State, & Local Taxes	<u>2,655,654</u>	<u>100.00%</u>

Discussion and Conclusions

This study evaluated the economic impacts of the St Augustine Amphitheater to St Johns County in calendar year 2013 using data from a survey of over 900 attendees throughout the year, and the IMPLAN® regional modeling software. By modeling how the Amphitheater operations interact with the County's economy, industry specific and total impacts of the facility can be quantified. Estimated output, value added, income, job, and tax impacts provide different measures of how the Amphitheater contributes to the County's economy. Estimating these values also makes it possible to compare its contribution to other activities and industries in the County.

In 2013 the Amphitheater attracted nearly 100,000 attendees, who spent an estimated \$12.8 million dollars in the County. Nearly 65 percent of these attendees came from outside St Johns County, who spent \$8.25 million in new dollars. As these local and new (tourist) dollars cycle through the local economy, \$17.3 million in additional revenues were generated for county businesses, as well as \$10.3 million in value-added contribution to GDP, including \$6.2 million in labor income, and \$1.5 million in state and local tax revenues. The attendee spending also generated 207 fulltime and part-time jobs for the county. In 2012, St. Johns County had a gross regional product of approximately \$5.6 billion and employment in excess of 77,000 jobs, so the economic activity attributed to the Amphitheater represented 0.19 and 0.27 percent, respectively, of the overall county economy.

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- St. Augustine Amphitheater, Facility – Venue Specification and History, website available at <http://staugamp.sjvenues.com/> (accessed March 7, 2014).
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Appendix A: Glossary of Regional Economic Terminology

Direct effects/impacts: Direct impacts, represent the revenues, value-added, income, or jobs that result directly from an economic activity within a regional economy.

Employment or Jobs: Represents the total numbers of wage and salaried employees as well as self-employed jobs. This includes full-time, part-time and seasonal workers measured in annual average jobs.

Gross Regional Product is a measure of total economic activity in a region, or total income generated by all goods and services. It represents the sum of total value added by all industries in that region, and is equivalent to Gross Domestic Product for the nation.

IMPLAN is a computer-based input-output modeling system that enables users to create regional economic models and multipliers for any region consisting of one or more counties or states in the U.S. IMPLAN accounts for commodity production and consumption for 440 industry sectors, 10 household income levels, taxes to local/state and federal governments, capital investment, imports and exports, transfer payments, and business inventories.

Indirect Business Taxes: Include sales, excise, and property taxes as well as fees and licenses paid by businesses during normal operations. It does not include taxes on profits or income.

Indirect effects/impacts: Indirect effects occur when businesses use revenues originating from outside the region, or study area, to purchase inputs (goods and services) from local suppliers. This secondary, or indirect business, generates additional revenues, income, jobs and taxes for the area economy.

Induced effects/impacts: Induced effects or impacts occur when new dollars, originating from outside the study area, are introduced into the local economy. Induced economic impacts occur as the households of business owners and employees spend their earnings from these enterprises to purchase consumer goods and services from other businesses within the region. This induced effect generates additional revenues, income, jobs and taxes for the area economy.

Industry Sector is an individual industry or group of industries that produce similar products or services, or have similar production processes. IMPLAN Sectors are classified along a scheme similar to the North American Industrial Classification System (NAICS).

Input-Output Analysis: The use of input-output models to estimate how revenues or employment for one or more particular industries, businesses or activities in a regional economy impact other businesses and institutions in that region, and the regional as a whole.

Input-Output Models: Are mathematical representations of economic activity within a defined region using inter-industry transaction tables or matrices where the outputs of various industries are used as inputs by those same industries and other industries as well.

Intermediate sales are sales to other industrial sectors. The value of intermediate sales is netted-out of Total Value Added.

Labor Income: All forms of employment compensation, including employee wages and salaries, and proprietor income or profits.

Local revenues/expenditures: Local revenues or spending represent simple transfers between individuals or businesses within a regional economy. These transactions do not generate economic spin-off or multiplier (indirect and induced) effects.

NAICS: North American Industry Classification Scheme. NAICS is used classify business establishments according to type of economic activity (process of production) in Canada, Mexico and the United States.

Non-local revenues/expenditures: When outside or new revenues flow into a local economy either from the sale of locally produced goods and services to points outside the study area, or from expenditures by non-local visitors to the study area, additional economic repercussions occur through indirect and induced (multiplier) effects.

Other Property Type Income: Includes corporate profits, capital consumption allowance, payments for rent, dividends, royalties and interest income

Output: Revenues or sales associated with an industry or economic activity.

Total Impacts: The sum of direct, indirect and induced effects or economic impacts.

Value-added: Includes wages and salaries, interest, rent, profits, and indirect taxes paid by businesses. Value-added is comparable to Gross Regional or National Product.

Appendix B: Survey Questionnaire

University of Florida St. Augustine Amphitheater Attendee Survey

ID

Survey date:		Time:		Interviewer name:	
Amphitheatre location:			Amphitheatre show:		

1. Are you at the amphitheater today on a “day trip” with plans to return home today, or are you spending one or more nights away from home?

O1	Day trip (Skip to Question 4)	O2	Staying overnight	O8	Not sure/Refused
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2. How many total nights on this trip will you spend in the St. Johns County area, including St. Augustine, St. Augustine Beach, Crescent Beach, Ponte Vedra Beach, Vilano Beach, Hastings, Marineland, Sawgrass, World Golf Village, and Fruit Cove?

Number of nights:		O88	Not sure/Refused
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3. What type of overnight accommodations are you primarily using in the St. Johns County area on this trip? [Check one.]

O1	Hotel or motel	O2	Bed & Breakfast
O3	Condo / Apartment / House	O4	Campground
O5	Staying with friends / family	O6	Not sure / Refused
O7	Other (describe): in Excel		

4. Is your visit to the amphitheater the primary purpose of this trip to the St. Johns County area?

O1	Yes (Skip to Question 6)	O0	No	O8	Not sure/Refused
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5. What are the other purposes of this trip to the St. Johns County area? [Check any that apply.] **1 or 0**

AO	Visiting historical downtown St. Augustine	BO	Visiting the beach
CO	Visiting other St. Augustine attraction(s)	DO	Fishing
EO	Attending a sporting event)	FO	Boating (sail, canoe, kayak, etc.)
GO	Attending a conference or convention	HO	Attending a personal special event (i.e. wedding)
IO	Shopping	JO	Not sure/Refused
KO	Other (describe): in Excel		

6. How many adults (age 18 or older), including yourself, and how many children (under age 18) are in your party on this trip?

Number of adults:		O88	Not sure/Refused
Number of children:		O88	Not sure/Refused

7. Please estimate how much your party has spent or will spend in the St. Johns County area on this trip in the following categories. [Either check the appropriate amount or enter the specific amount.]									
Expense item	Zero	\$1 to \$9	\$10 to \$24	\$25 to \$49	\$50 to \$99	\$100 to \$249	\$250 to \$499	\$500 or more	Specific amount (\$) Round to nearest dollar
A. Restaurants/bars	00	10	20	30	40	50	60	70	7A1.
B. Food/beverages at stores	0	0	0	0	0	0	0	0	7B1.
C. Lodging	0	0	0	0	0	0	0	0	7C1.
D. Rental vehicle	0	0	0	0	0	0	0	0	7D1.
E. Gasoline/oil	0	0	0	0	0	0	0	0	7E1.
F. Parking or beach access	0	0	0	0	0	0	0	0	7F1.
G. Bus, taxi, sightseeing tours	0	0	0	0	0	0	0	0	7G1.
H. Entertainment (attractions, concerts, movies)	0	0	0	0	0	0	0	0	7H1.
I. Recreation (fishing, boating, cycling)	0	0	0	0	0	0	0	0	7I1.
J. Shopping (clothing, gifts, etc.)	0	0	0	0	0	0	0	0	7J1.
K. Other (describe below)	0	0	0	0	0	0	0	0	7K1.
Other specific expenses/purchases: in Excel									

8. What is your home zip code?		O00000	Foreign resident	O99999	Refused
9. In what year were you born?		O9999	Refused		

10. What is your race or ethnic origin? [Check all that apply.] 1 or 0 for each response					
O	A. Caucasian / White	O	E. Hispanic / Latino		
O	B. African American / Black	O	F. Asian		
O	C. Native American / American Indian	O	G. Other (describe) :in Excel		
O	D. Pacific Islander	O	H. Refused		

11. What is the highest level of education you completed? [Check one.]					
O1	Primary school (through 9 th grade)	O5	College degree (associate's or bachelor's)		
O2	High school diploma or GED	O6	Graduate / Professional degree		
O3	Vocational / technical school	O9	Refused		
O4	Some college, no degree				

12. Respondent gender [Interviewer: record, do not ask.]	O1	Male	O2	Female
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13. Do you have any general comments about the St. Augustine Amphitheatre or the St. Johns County area? 1=comment 0=no comment in Excel

Appendix C: Analysis of Sales for Tourism-Related Businesses in St. Johns County and St Augustine Amphitheater Attendance

Figure C1. Time series plot of monthly taxable sales in St. Johns County and St. Augustine Amphitheater monthly attendance, 2008-13.

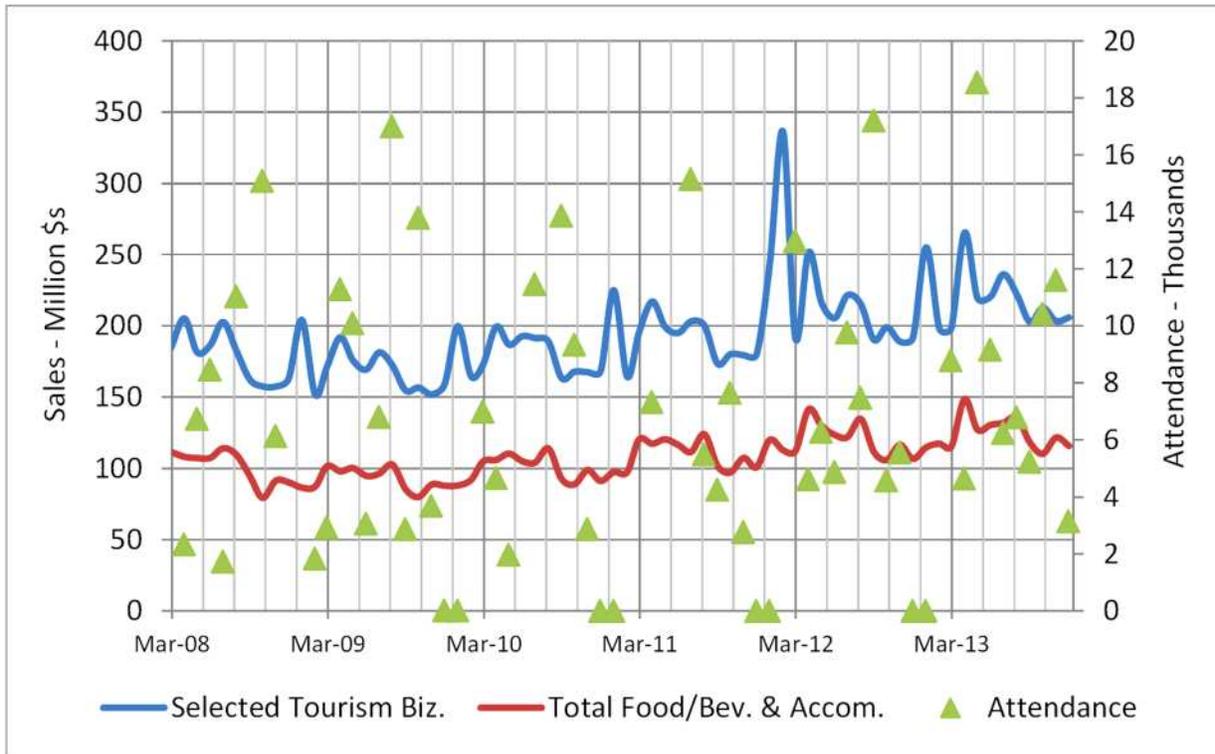


Figure C2. Scatterplot and linear regression analysis of St. Johns County FL monthly gross taxable sales for selected tourism businesses against monthly St. Augustine Amphitheater attendance, 2008-13

