

# THE ECONOMIC IMPACT OF THE EMBASSY THEATRE ON ALLEN COUNTY, INDIANA

WITH SPECIAL EMPHASIS ON THE IMPACT TO DOWNTOWN FORT WAYNE



Prepared for the Embassy Theatre

by the Community Research Institute  
at Indiana University-Purdue University at Fort Wayne

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# THE ECONOMIC IMPACT OF THE EMBASSY THEATRE ON ALLEN COUNTY, INDIANA WITH SPECIAL EMPHASIS ON THE IMPACT TO DOWNTOWN FORT WAYNE

## Executive Summary

The Embassy Theatre is known for its artistic and cultural impact, yet its role as a contributor to the Allen County, Indiana economy is not as well known. This report documents the economic contribution of the Embassy Theatre to Allen County economy. In addition, a special report addresses the Embassy Theatre's relationship to the economy of Downtown Fort Wayne.

Key findings include:

### **Spending by out-of-county visitors to the Embassy Theatre generates economic activity throughout the county.**

- The Embassy Theatre annually draws an audience of over 110,000 individuals; our study surveyed most of these events and it was found that 34.3 percent of the attendees are from outside Allen County.
- Direct spending on local restaurants, lodging, retail, and other activities by out-of-county visitors who can be attributed to the Embassy Theatre represents approximately \$1.018 million dollars flowing into Allen County.
- The indirect and induced activities, i.e. the multipliers, from the businesses serving the Embassy visitor create further economic impacts. As a result, the total impact of the Embassy Theatre visitors with an additional \$583,000 in multiplier impact results in an impact exceeding \$1.6 million dollars.
- There is also direct spending in Downtown Fort Wayne. This is not a subset of the visitor impact, but rather reflects all patrons, local and visiting. Over \$1.02 million dollars of Downtown Fort Wayne's economy is directly related to events at the Embassy, and, not surprisingly, the majority of this is related to dining and accommodations. Ticket sales at the Embassy are not included. The total impact which includes multipliers, on Downtown Fort Wayne was not calculated due to the small geographic area.

### **The direct operations of the Embassy Theatre also generate significant spending and employment.**

- Operations and event spending in Allen County by the Embassy Theatre approximates \$1.35 million dollars annually in Allen County, including \$502,000 in wages to Embassy employees who are residents of Allen County. This \$1.35 million dollars is spent within Allen County on such items as local Embassy employee wages and benefits, marketing expenses, professional fees, contract labor, and supplies. This impact also includes the contractual business arrangements related to the events occurring at the Embassy such as stagehands and marketing.
- Direct employment by the Embassy Theatre translates into over 17 full-time or part-time positions by Allen County residents. This is the equivalent of 10 FTE, or full-time-equivalent employees. There was significantly more employment generated through contract employment.

### **Direct, indirect, and induced spending associated with operations by the Embassy Theatre support significant economic activity within Downtown Fort Wayne and Allen County.**

- In addition to the direct operations spending by the Embassy Theatre as noted above, when the multiplier effects are included, an additional \$800,000 is created through the indirect and induced effects with Allen

County firms and businesses. Together this \$2.15 million is the full impact from the direct operations and the multipliers, i.e. the induced and indirect effects.

**The combined effects of operations and visitor spending associated with the Embassy Theatre including the multipliers, generate \$3.75 million dollars in business activity for the county, or almost four million dollars annually.**

**Construction and Redevelopment activities by the Embassy Theatre have generated additional business sales, earnings, and employment and will continue to impact the local economy as future projects are undertaken.**

- Finally, the impact of a major construction project also has an impact on the county. When the pedestrian bridge across Harrison was completed and the third floor of the Embassy was remodeled, this two-year project added a substantial impact to the county's economic base especially through the additional employment during this construction. As the Embassy considers further projects, the additional impacts on the county should not be overlooked. For this project alone, the direct construction effect on Allen County was over \$1.5 million dollars. After the multiplier, the effect was \$2.16 million in additional impact in Allen County. In addition, this project provided the equivalent of 14 full time jobs annually, or 22 FTE after including multiplier effects.

# THE ECONOMIC IMPACT OF THE EMBASSY THEATRE ON ALLEN COUNTY, INDIANA WITH SPECIAL EMPHASIS ON THE IMPACT TO DOWNTOWN FORT WAYNE

## Introduction

The Embassy Theatre, Indiana's largest historical theater, opened its doors in downtown Fort Wayne in 1928. With more than 3,000 seats<sup>1</sup>, it was the largest and most imposing of the city's theaters, and visitors from outside the city were drawn to Fort Wayne to see the nation's top performers and major musical events in a beautiful and grand setting. By the mid-1960s, it began to lose its position as a performing venue and eventually closed. Threatened with demolition to make way for a parking lot and actually within days of being torn down, a small group of local citizens formed the Embassy Theatre Foundation, Inc. a non-for profit foundation that not only saved the historic building, but provided the impetus for many of the necessary improvements that define it today as one of the premier performing arts centers in the state.

The Embassy is more than a concert hall. Every year, the Embassy Theatre hosts more than 100,000 visitors to various musical events, show and stage performances, and many more come to use the backdrop of the Embassy and its lobby for private events and weddings. When the Embassy was built in 1928, the 150-room Indiana Hotel wrapped around the north and west sides of the theatre. Many of the original hotel areas, such as the Indiana Hotel Lobby, have been restored and are in use for certain events, such as the Festival of Trees and the Downtown Fright Night, as well as for weddings and conferences.

In 2010, the Community Research Institute at Indiana University-Purdue University Fort Wayne (CRI) was engaged by the Embassy Theatre Foundation, Inc. to conduct an economic impact study of the Embassy Theatre and its impact on Allen County. In addition, there were two other areas of interest. A subcomponent of this report would focus on the impact of the Embassy on the downtown area of Fort Wayne, and another would investigate the construction activities within the Embassy in the recent past. CRI completed a year-long study which involved surveying the patrons at events within the Embassy. In addition, CRI reviewed annual expenditures of the Embassy Foundation as well as investigated the facility rentals in order to evaluate the annual economic impact on Allen County.

## Definitions

The purpose of this report is to identify the economic impact of the Embassy Theatre on Downtown Fort Wayne and on Allen County, Indiana. Fort Wayne, a city of approximately 250,000, is the county seat of Allen County. Allen County is in northeast Indiana, and with a population of over 355,000, is the urban center for the region.

**Types of Economic Impact:** The purpose is to identify the economic contribution of the Embassy Theatre on the local economy, which is defined as Allen County, Indiana, as well as the impact on Downtown Fort Wayne. An organization such as the Embassy Theatre makes an economic contribution through five types of impacts.

- **Direct effects:** This is all the direct expenditures, including employment, by the Embassy Theatre that effect the local economy. For example, if the Embassy Theatre did all their printing with an Allen County print shop, those funds stay in Allen County and are recirculated by the Allen County print shop. If an employee lives in Allen County, a good portion of their salary goes to support their living expenses in Allen

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<sup>1</sup> The number of seats was reduced to 2,471 during remodeling in 1980.

County. Also included with the direct effects are the expenses handled by the Embassy Theatre for their theatrical operations, such as expenses for stagehands and marketing.

- Indirect effects: The businesses that supply the Embassy Theatre with goods and services, such as the print shop in the above example, have new income to pay its employees, buy supplies, and pay for the costs involved when doing business. Some of these funds circulate again in the county when the company which sells the paper to the print shop now has increased sales, and it uses those funds to pay its employees and for its supplies. Not all of the money received by either of these establishments stays in Allen County as it is recirculated. For this impact study, an economic model developed by Economic Modeling Specialists Inc. (EMSI) for Allen County is being used to estimate how each sector is impacted as funds are recirculated.
- Induced effects: This is the economic activity generated by the Embassy Theatre employees or the employees of the suppliers as they spend their wages on various consumer purchases in Allen County. Similar to indirect effects, some of this money is re-spent in Allen County, and we use the model identified above to identify the effect on specific industries. The model may be understating the effects in this particular case since there is substantial employment generated by the Embassy's operations.
- Visitor effects: This is the business activity created by the spending of individuals who are in Allen County (or Downtown Fort Wayne) specifically to attend an event at the Embassy Theatre. These visitors spend money on lodging, restaurants, retail and other activities. There is also an indirect and induced business activity of supplies and vendors to the visitor-serving establishments to create further impacts.
- Tax effects: As visitors pay specific Allen County taxes such as the Innkeepers' tax and the Food and Beverage tax, those funds stay within Allen County to support such entities as the Grand Wayne Convention Center, the Allen County War Memorial Coliseum, and VisitFortWayne. In addition, there is a specific income tax on Allen County residents that remain in the county. We have included these taxes as part of our local impact, but not others, even though a portion of the taxes collected by the state of Indiana will be allocated to Allen County.

The indirect and induced effects are often referred to as the multiplier effects.

As we analyze the economic contributions of the Embassy Theatre on Downtown, the actual multiplier effect will be small—so small that we are not even going to estimate it. We use models which have been developed based on a region's employment in specific industries, its earnings in those industry sectors, and business sales. Note that the smaller an area, the smaller the multipliers since there is more chance of "leakage" that is, the chances that Downtown restaurants purchase their supplies from a Downtown supplier entity are small since the number of firms that are located in Downtown are few. Similarly, if we broadened the area to include all of Indiana, the multiplier would be much larger. For example, if the Embassy Theatre did not hire an accounting firm from within Allen County, chances are great that their accounting firm is located somewhere within Indiana. Those funds received by the Indiana accounting firm would re-circulate among other Indiana businesses, and the multiplier would be larger.

One more word about multipliers: There are various types of multipliers. Sales multipliers are easy to understand—on the surface. New money comes in as a sale, and various sales continue to occur with this same dollar. There are pros and cons of discussing the results of an impact analysis with sales multipliers—the biggest point in favor of using sales multipliers is that they are commonly used in basic economic impact studies. However, there is a common complaint when using sales multipliers that should be addressed—very few studies take the margin into account. For example, certainly not every dollar spent at a Holiday Inn is going to stay in Allen County, even if the Holiday Inn only employed employees who live in Allen County and only bought supplies from a company within Allen County. There is national marketing, executive management, and shareholders who will

need to collect some of those dollars. But when sales are reduced to the margin, the actual dollar amount does not look helpful because we are not used to seeing a sales given at the margin. Given that caveat, we will use total sales and sales multipliers in this report.

Downtown is defined as the area bordering Broadway, the St Mary's River to the north, Lafayette Street to the east, and Masterson Street to the south<sup>2</sup>.

The Fort Wayne Philharmonic uses the Embassy Theatre as their major venue for performances. The Philharmonic has two major types of subscriptions: the Masterworks are orchestral, classical performances, while the Pops Concerts feature more contemporary or show music. Both of these feature guest artists, and while single tickets are available, many of the patrons are subscription concert-goers. The business operations of the Philharmonic were not part of this study. Information on Philharmonic patrons is shown in Appendix A, and this is for general informational purpose since the Philharmonic visitor impacts are included in the Embassy season report.

## Methodology

The Community Research Institute (CRI) prepared both paper and electronic surveys to capture visitor spending data. Patrons were sent an email after the event or given a card upon entering the Embassy Theatre auditorium which listed the web site of the survey. All survey-takers were notified of an incentive to complete the survey: there was a monthly drawing for a gift certificate to a popular downtown restaurant, Club Soda. In addition, patron-intercept surveys were done at the November Philharmonic Masterworks concert and at the Festival of Trees. While surveys were occasionally tailored for a specific event<sup>3</sup>, the same basic economic impact questions were asked, and a sample survey is included as Appendix B.

The impact of visitors on Allen County's economy is described in the next section, with The Festival of Trees (FOT) event broken out independently. In total for the season, CRI collected a total 2,111 usable surveys from Embassy Theatre events plus an additional 217 surveys from the FOT surveys<sup>4</sup>. Keep in mind that these represent "parties" and not individual patrons. We used the results from the surveys to calculate the direct effects from the visitors. Then, as identified previously, we used the input/output model supplied by EMSI to calculate the multiplier effects of the visitor patron spending.

The EMSI model was also used when calculating the multiplier effects of operational expense of the Embassy Theatre. The in-county expenditures were identified by the Embassy Theatre Finance Office. CRI assigned multipliers depending on the sector or industry and those were used to calculate the multiplier effect. A similar review was performed to review the construction impact.

CRI used conservative estimates and methodologies whenever possible. Examples of some of the choices we made in an effort to not overstate the Embassy Theatre's impact on Allen County include the following:

- We did not include weddings or school events when calculating the visitor impact on Allen County. The Embassy Theatre and lobby present a unique setting for a special event and it is possible that this venue could be the over-riding factor in choosing a location. However, we shall maintain our position that if a

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<sup>2</sup> Note that the "official" southern border of the Downtown Improvement District may be the railroad tracks between Grand and Baker Streets, but we included the Oyster Bar on our list of defined downtown restaurants in our survey, so the region is extended to Masterson to include the Oyster Bar.

<sup>3</sup> CRI developed over 6 unique surveys for the 2010-11 season.

<sup>4</sup> There was sufficient response from the surveys to give us a high degree of confidence in the survey results.

decision was made to be married in Allen County, then one of the local venues would have been booked, even if the Embassy Theatre was not available. The same is true for a high school graduation or special event. In terms of a separate impact to Downtown Fort Wayne, we believe that most likely an impact was made on the downtown hotels when a wedding or graduation occurred at the Embassy Theatre, and did include these events when estimating the Embassy's relationship with downtown.

- We excluded from the impact all out-of-county visitors who attended an event but were in town for other reasons. This question was included on all surveys.
- We excluded all visitors who were involved with tours of the Embassy Theatre.
- We do have an estimate for the expenses of visiting performers, but intentionally kept this estimate low and this was assigned on a case-by-case basis.
- We have not included the full effect of the tax impact on Allen County; just specific taxes that can be directly identified and calculated as remaining in Allen County.

Through our surveys, we were able to gather additional information that may be relevant to the Embassy Theatre although not all of that data is associated with an economic impact. Many of these were comments and suggestions which were directly submitted to the Embassy and are not included in this report; however there is a limited amount of non-impact analysis which is summarized later in this report. Also, as we forwarded comments to the Embassy during the season, it was refreshing to see that Embassy management listened carefully to the suggestions. Many of the suggestions resulted in updates to building and patron services this year.

## The Impact of the Embassy Theatre on Allen County

### Impact of Visitors to Allen County and Results from the Patron Survey

The Embassy Theatre was the venue for over 76 "stage" events during its 2010-11 season, and these events are representative of a typical season. There were approximately 110,000 patrons attending these 76 events. Some of these events take place over a multi-day period, such as the Festival of Trees, but most are single day events. Each year the season generally begins in September and ends in May. A full list of events for the 2010-11 season is included as Appendix E. There were several specific events geared to youth or school children, such as the Fort Wayne Philharmonic Youth Performances and Bradley Field's "Math the Magic" that by the nature of the audience, were excluded from our survey, and also from contributing to the economic impact. There are other events, such as local high school graduations and other high school programs, that would have taken place somewhere in Allen County if the Embassy had not been available, and the conservative nature of this report excludes events such as these as being identified as impacts on Allen County due to the presence of the Embassy. These events, plus "Be a Tourist in Your Own Hometown" may have had an impact on Downtown, and those events will be included when we examine the ties between Embassy events and Downtown, but we are not including those types of events as being part of the Embassy's impact on Allen County. The events which are not part of the impact of the Embassy Theatre on Allen County are noted in the Appendix E.

Several of these events were evaluated independently. These include the following:

- 1) The Indiana Music Educators Association's (IMEA) Conference was held January 19-22 in Fort Wayne for the first time in 2011, and the conference will be held at this location for the next several years. The decision to have this conference in Fort Wayne was due to a superb effort made by a number of organizations and individuals, and although the Embassy's stage availability was a factor in the decision to



host it here, it was not the sole deciding factor. The Grand Wayne Convention Center, Allen County Library, IPFW, and the First Pres<sup>5</sup> were all partners in landing this conference. Some of the impact of this conference will be shared with the Embassy, since it was acknowledged as a “Prime Jewel” in the total package. Thousands of people attended this conference: there were educators, student performers, and their families.

- 2) The other event was the Festival of Trees, which has been a week-long fund-raising event for the Embassy Theatre since 1985. Over 15,000 people annually attend this event. CRI conducted a patron-intercept method of surveying almost exclusively for this event, and the some of the results from this event are shown separately in this report, although the economic impact is included as part of the overall impact.

Note that we were prepared to analyze the Philharmonic separately and did in fact do a patron-intercept survey at a Masterworks concert. While sufficient responses were received from Philharmonic patrons throughout the year to make this step unnecessary, we did include an appendix (Appendix A) which summarizes results which pertain to the Philharmonic patrons.

### **Impact of Specific Events Other Than Festival of Trees**

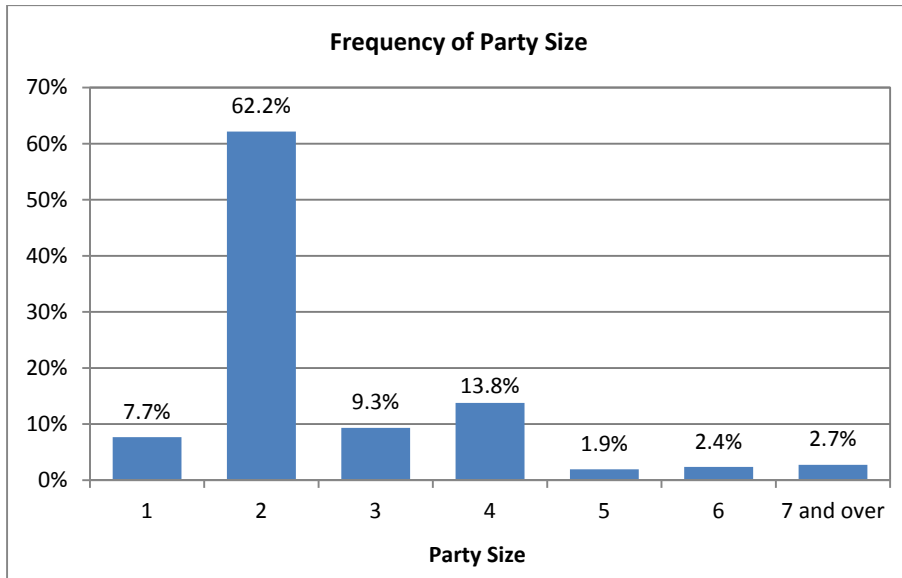
Excluding the attendance and impact of the two events listed above which are reviewed independently (IMEA and FOT), and also excluding the events geared for children as discussed above, the data in the following discussion reflects the effect of 57 shows or performances involving 73,573 in attendance for the 2010-11 season.

It was found that almost one percent of attendees were in the area for other reasons, and “just decided to take in an event at the Embassy” while they were here. These people, even though they are from outside the county, do not make an economic impact that is directly attributable to the Embassy Theatre, and are not included as part of our calculations.

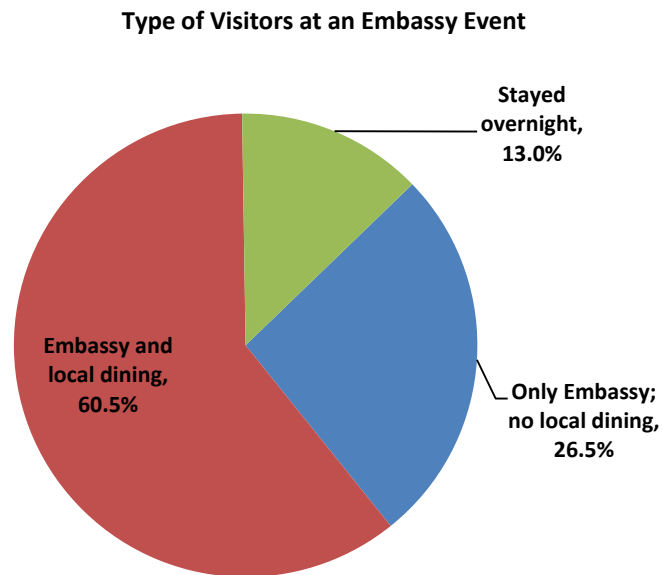
The average party size was 2.65: 2.58 persons per party for those from Allen County and 2.78 persons per party for visitors. The chart below identifies the frequency of the party sizes for all groups. Note that bus groups are popular at the Embassy Theatre, but we did not want a survey responder to assume financial knowledge for their total bus group. Our survey asked members of bus groups to identify themselves as part of a group for which they were financially responsible. For example, if a couple attended an event at the Embassy Theatre as part of a bus group, they would identify themselves as a party of two. A single person attending with friends would identify herself as a party of one if she was responsible for paying for just her own ticket or her own dinner.

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<sup>5</sup> First Pres is the theater arm of the First Presbyterian Church, located in downtown Fort Wayne.



Of the 2,111 surveys taken during these 57 events, 35.3 percent were visitors who were in Allen County specifically to attend an Embassy event. Appendix F identifies the geographic location of these patrons as well as the attendees at the Festival of Trees. Excluding the out-of-county visitors who were here for reasons other than attending an Embassy event, visitors at these 57 events are divided into three types:



### ***Dining, Concessions, and Other Purchases***

73.5 percent of all visitors dined in a restaurant in Allen County in connection with their Embassy event, a much higher percentage than Allen County residents who dine out in connection with an Embassy event (locals dined out 39 percent of the time). Of those who dined, the average amount spent was \$63.55 per party<sup>6</sup>. The average Allen County party who dined spent \$70.00 per party. All visitors, including those that spent nothing, spent an average of \$44.91 per party on dining.

29.7 percent of all visitors purchased items at the concession area or bar at the Embassy. This is less than the 38.1 percent of local Allen County residents who visited the concessions. Of those who visited the concessions, the average amount spent per visitor party was \$14.87. The average Allen County resident party spent \$11.97. All visitors, including those that spent nothing, spent an average of \$4.41 per party on concessions.

18.7 percent of all visitors indicated that they purchased gasoline. Of those who bought gas, the average amount spent per visitor party was \$40.03. All visitors, including those that spent nothing, spent an average of \$7.47 per party on gasoline.

For information purposes since the relationship between economic impact and show merchandise is handled differently, 14.1 percent of all visitors to the Embassy purchased souvenirs and of those who purchased, the average amount spent per party was \$39.95. (Visitors who came just for the event and indicated that they did not dine in Allen County spent the most-\$49.49 per party). Only 10 percent of Allen County residents purchased souvenirs and the average amount spent per party was \$35.64. When considering all visitors including those that spent nothing, the average visitor party spent \$5.65.

The above can be summarized in the following table:

	<b>Dining</b>	<b>Embassy Concessions/Bar</b>	<b>Embassy/Show Merchandise</b>	<b>Gasoline Purchases</b>
Out-of-county visitor: Percent of that group which did the activity:	73.5%	29.7%	14.1%	18.7%
Allen County resident: Percent of that group which did the activity:	39.0%	38.1%	10.0%	NA
Visitor: Average Amount Spent Per Party	\$63.55	\$14.87	\$39.95	\$40.03
Resident: Average Amount Spent Per Party	\$70.00	\$11.97	\$35.64	NA

### ***Parking***

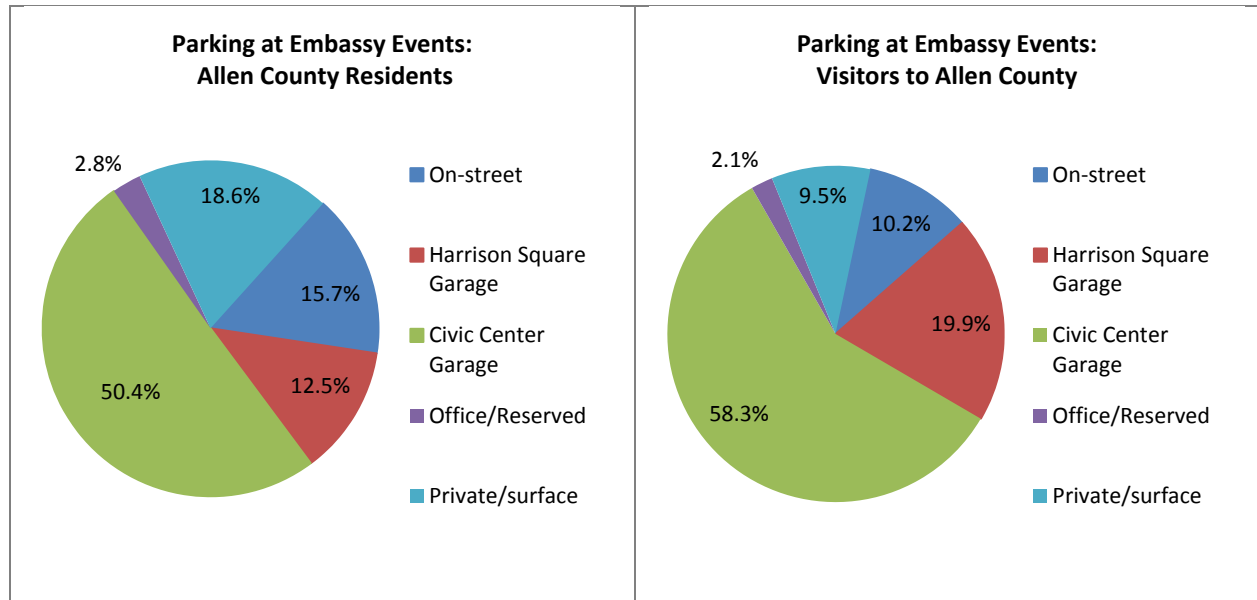
Parking at events such as those held at the Embassy not only generates economic impact and jobs, but also provide visitors with an important first impression of the community and its ability to welcome guests. With the opening of the Harrison Square garage, a new parking garage on Harrison Street with bridge access to the Embassy, there are now two parking garages within a block of the Embassy Theatre<sup>7</sup>. It was thought that with two parking garages nearby with very reasonable rates<sup>8</sup>, that comments would be positive in this area. Comments have been forwarded to the Embassy Theatre in a separate document, but there were many comments with suggestions on how parking in the garages can be improved.

<sup>6</sup> This includes the average of the total amount spent by those who spent the night in Allen County.

<sup>7</sup> The Civic Garage (bordering Jefferson, Calhoun, and Clinton Streets) also has bridge access from the garage to the Embassy.

<sup>8</sup> For most events, the garages have set fees, either \$2 or \$4 per event, and do not charge by the hour.

Visitors to Allen County used these parking garages to a greater extent than the local residents. 78.2 percent of all visitors used one of these garages compared to 62.9 percent of Allen County residents. Perhaps local residents felt more comfortable using private lots and on-street parking, as shown in the charts below. The Ride & Dine program may have had an impact in this area, although our data is not sufficient to make any connections. For more on the Ride & Dine program, see Appendix G.



### Overnight Visitors

As mentioned earlier, 13 percent of all visitors (or almost 5 percent of all Embassy parties) spend the night in Fort Wayne in connection with the Embassy event. Ninety percent of these overnight visitors were in a hotel; the remaining 10.4 percent stayed with friends or family. The average bill per party was \$138.34 (of those who stayed in a hotel) and this reflects the total stay.

### Other Activities

The survey included a section which asked the visitors what other activities they engaged in while in Allen County. Only 14.5 percent of all visitors included additional activities, other than dining, while in Allen County to attend an event at the Embassy. Of those who indicated an activity, the average amount spent per visitor party was \$86.52. When including all visitors including those that spent nothing, the average visitor party spent \$12.57 in Allen County on activities. The most popular event was “shopping or movies”, and the frequency for all events is shown in the table below. The most common response, other than “no activity”, was one additional event.

Not surprisingly, those who stay overnight attend another activity at more than twice the rate of those who do not spend the night, and they also spend more money per party on these activities.

<b>Percent of all parties who indicated the following activities in addition to Embassy event:</b>	<b>Visitor who did not spend the night</b>	<b>Overnight visitor</b>
Indicated "no other event"	79.9%	55.2%
Shopping or Movies	12.2%	14.5%
Other-Please Specify(1)		
Fort Wayne Allen County Library, including Genealogy	1.3%	1.0%
<b>Less than 1 percent of the parties:</b>		
Any of the Fort Wayne museums		
Event at Grand Wayne Center	Fort Wayne Children's Zoo(2)	
Event at Allen County Coliseum	Foellinger-Freiman Botanical Conservatory	
The Arts Scene-Art Galleries, Art Link, Cinema Center	Science Central	
<b>No Responses Indicated:</b>		
College, High School, or Youth events		

- (1) Note that respondents did write- in activities, but none were significant, i.e. did not exceed one percent of the patrons' responses.
- (2) Note that the many of these events are not occurring throughout the year. For example, the zoo's main season is the opposite of the Embassy's-most Embassy patrons would find the zoo closed during their visit.

### **Ticket Sales**

Although ticket sales are certainly an impact from visitors to Allen County, the effect of tickets sales will be considered when we review the Embassy's operational expenses.

### **Embassy Theatre's Festival of Trees**

The Festival of Trees is an annual tradition. It begins the day before Thanksgiving, is an on-going week-long event, and is one of the Embassy's major fundraising events. The Festival of Trees (FOT) has a long history in Fort Wayne- more than 25 years- and is part of many families' holiday entertainment plans. The lobbies and hallways are decorated with themed Christmas trees and wreaths, and the stage is a constant source of activity with many children's' choirs, dance teams, bands, and other entertainment activities. In downtown Fort Wayne during this time, there are many other Christmas, holiday, or "winter-themed" events occurring during this same week. In an effort to gauge the economic impact of an event such as this, we attempted to design a survey to help us identify the economic impact of the Embassy Theatre while taking other factors into account. For example, we only wanted to include the impact from those who were downtown either to "mainly attend the FOT" or to "solely attend the FOT". There is a greater impact than expected because the Embassy Theatre schedules entertainment from many areas outside Allen County. Many of those groups come from outside the county, and even from Ohio, and help expand the impact of visitors since very often, parents and relatives come to watch the performances.

The audience for the 2010 Festival of Trees was 15,041, and this represented approximately 3,550 parties.

There were 217 usable surveys taken during this event.

Almost 25 percent of the parties surveyed indicated they had at least one member of their group who did not live in Allen County, but the actual percentage used in our calculations for out of town visitors was 19.8 percent of all attendees. Some of the parties indicated that they were downtown for other events and "just decided to take in some of the downtown holiday activities" or that they enjoyed the Embassy's Festival of Trees, but were equally interested in other downtown holiday events. These were excluded as part of the Embassy Theatre's impact. Those who indicated they were "mainly" downtown to attend the FOT as well as those who indicated they were "only" downtown for the FOT will be the focus of the impact to Allen County. These groups represent 19.8 percent of all attendees at the FOT, and are referred to as FOT visitors or impact visitors to distinguish them from the other

visitors who are in town during this time for the many events which are not entirely attributable to the Embassy Theatre.

The average party size for all who attended the FOT was 4.24, and the average size for the FOT visitors was 4.27 persons per party.

<b>Activities Identified by FOT Visitors</b>	
Shopping or Movies	25.6%
Allen County Coliseum	4.7%
Fantasy of Lights	4.7%
Other Activities Identified, but by less than 2.5 percent of all visitor parties:	
Museums	
Art Centered	
College, High School, or Youth Events	
Science Central	

### ***Dining, Concessions, and Other Purchases at the Festival of Trees***

58.1 percent of the FOT visitors indicated that they dined out, and the average amount per party was \$46.16. The average expenditure for all FOT visitors including those who spent nothing was \$27.48 per party.

34.9 percent of all FOT visitors visited the concession area or bar at the Embassy. Of those who went to the concessions, the average amount spent per visitor party was \$8.20. The average expenditure for all FOT visitors including those who spent nothing was \$2.86 per party.

25.6 percent of the FOT visitors indicated that they purchased gasoline and the average amount per party was \$37.50. All visitors, including those that spent nothing, spent an average of \$8.93 per party on gasoline.

### ***Overnight Visitors***

Although seven percent of all FOT visitors indicated that they spent the night in Allen County, all indicated that they did not use a hotel. Rather, they all stayed with family and friends.

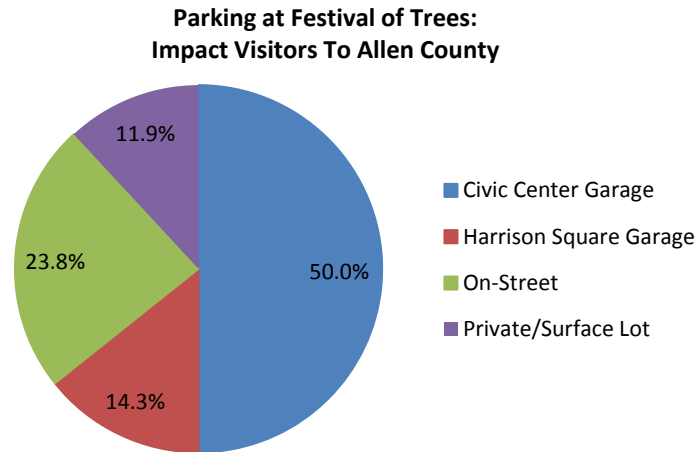
### ***Other Activities***

This section does not include attendance at other downtown festival events held during the same time as the Festival of Trees. Although almost all of our impact visitors indicated that they were downtown to attend the FOT, 37.2 percent of these were able to take part in some other activity in Allen County not related to the downtown activities. Not surprising, given this time of year, shopping was a popular activity. Within this group, the average amount spent per party was \$119.87. The average expenditure for all FOT visitors including those who spent nothing was \$42.81 per party.

### ***Parking at the Festival of Trees***

There were some slight differences in parking preferences by the FOT visitor compared with the annual review of parking by all Embassy event patrons. There was more on-street parking and less garage parking. Only 74.3 percent of these visitors indicated they used a garage, compared with 78.2 percent during the regular Embassy Theatre season.

The actual per party impact from parking will be slightly less for FOT visitors because the mayor has traditionally designated free parking in city garages during Thanksgiving Eve. When the dollar impact is shown in the following section, an adjustment will be made to adjust for approximately five percent who may have parked in the garages but not had to pay on Thanksgiving Eve.



### Volunteers at the Embassy Theatre

There is definitely an economic value for the thousands of hours contributed by volunteers of the Embassy Theatre. In an average year, over 12,000 hours are contributed by board members, special musical technicians especially the organ crew, pianists, fundraisers, and by those who assist the Embassy Theatre as ushers, tour guides, office assistants, and docents. The annual value of these hours is conservatively estimated at \$135,000<sup>9</sup>. If the Embassy needed to fill these as paid positions, the Embassy Theatre would not be able to spend that amount of money in some other area, and that impact would be lost. Given this, it is entirely appropriate to include this value as an economic impact, and this amount is incorporated into the total Embassy impact.

In addition, CRI maintains that those volunteers who travel into Allen County to assist the Embassy now are in a position to act as a visitor to the county. We prepared a survey for the volunteers to see what impact these volunteers might make when they arrive in Allen County to work at the Embassy. With 63 useable surveys returned<sup>10</sup>, it was estimated that approximately 17.5 percent of Embassy volunteers are not from Allen County. More than half of these “visitors” purchased food from a full-service or fast food restaurant. We also asked if they purchased gasoline while in Fort Wayne, but did not ask any other impact questions, such as shopping or activities. It is estimated that the impact from the volunteers as visitors was approximately \$5,372.

<sup>9</sup> Using values for occupations determined by the Points of Light Institute and is available at the Hands On Network, [www.handsonnetwork.org/tools/volunteercalculator](http://www.handsonnetwork.org/tools/volunteercalculator). CRI used the occupations usher, musician, and management analyst, and also reduced each suggested hourly wage by 5 percent to reflect Allen County’s lagging wage rates.

<sup>10</sup> We estimate that a 9.1 percent error rate at a 90 percent confidence level for this survey. Given the smaller dollars involved, we will use this data, and if there are errors, at least these will not change our results significantly.

## Annual Impact to Allen County Indiana from Visitors Attending Embassy Theatre Events

### Specific Events and the Festival of Trees

The table below identifies the impact of Embassy visitors on Allen County. Also included in the table are the funds spent by performers and their out-of-town crews for lodging and per diems while in Fort Wayne. Although these arrangements can be handled in various ways, the Embassy staff investigated each situation and worked with CRI to arrive at an estimate of the funds spent while the groups were in the county.

Visitors contributed over one million dollars, and after the multiplier effects, the total impact is \$1.6 million dollars in Allen County.

<b>Total Impact of Visitors Attending Embassy Theatre Events in Allen County, 2010-2011*</b>			
	<b>Direct</b>	<b>Indirect</b>	<b>Total</b>
Lodging	\$205,403	\$119,134	\$324,537
Restaurants and Food	\$486,854	\$278,480	\$765,334
Transportation-related expenses	\$101,306	\$61,799	\$163,105
Attractions & Retail	\$154,345	\$85,919	\$240,264
Volunteers & Performers as visitors	\$50,803	\$29,768	\$80,571
Allen County Food & Beverage, Innkeepers Tax	\$19,247	\$7,907	\$27,154
<b>Total</b>	<b>\$1,017,958</b>	<b>\$583,007</b>	<b>\$1,600,965</b>
*excluding the direct effects to the Embassy: ticket sales, concessions, merchandise which are included in Embassy operations section			

### Embassy Operations

The Embassy employs 19 people directly, and many more through contractual arrangements. Ninety percent of the direct employees live in Allen County and therefore their salaries and wages are part of the Allen County economy. As they buy groceries, pay their mortgages and other living expenses in Allen County, those funds become part of the economy and are recirculated through the multiplier effect. There are many others whose work is directly tied to events at the Embassy, such as the local stage hands at each event, but these are shown as expenses rather than as employment. Approximately \$502,000 is directly spent on employee wages and benefits on persons who reside in Allen County.

Additionally, 79 percent of the Embassy's operational expenses excluding compensation expenses, event expenses, and capital-excluding construction are spent in Allen County on goods and services which translate into \$715,700 direct dollars annually.

Together, direct operations spending by the Embassy Theatre were \$1,217,773 in 2010, which include \$502,000 in employee wages and benefits.

Direct, indirect, and induced spending associated with operations spending by the Embassy Theatre supports significant economic activity throughout the county. As shown in the table below, when the induced and indirect effects are included, the total impact of operations is \$2,148,243. This includes the impact of volunteer hours based on the rationale given in the previous section. The economic effect associated with the re-spending of wages, which is the induced effect, generates business sales with Allen County. In addition, the indirect effects from the re-spending of goods and services also generate further economic impact with more jobs and more sales.



<b>Allen County Impact of Operations and Events of Embassy Theatre</b>			
	<b>Direct</b>	<b>Indirect</b>	<b>Total</b>
Operational and Event Expense, including wage & benefits	\$1,217,773	\$798,470	\$2,016,243
Volunteers	\$ 132,000	Not calculated	\$ 132,000
<b>Total</b>	<b>\$1,349,773</b>	<b>\$798,470</b>	<b>\$2,148,243</b>

### Summary of Impact before Construction Projects

The combined economic impact of the Embassy Theatre is \$3.75 million dollars, or almost \$4 million dollars in sales input to Allen County.

<b>Allen County Impact of Operations and Events of Embassy Theatre</b>			
	<b>Direct</b>	<b>Indirect</b>	<b>Total</b>
Impact of Visitors to Allen County	\$1,017,958	\$583,007	\$1,600,965
Operational and Event expenses	\$1,349,773	\$798,470	\$2,148,243
<b>Total</b>	<b>\$2,367,731</b>	<b>\$1,381,477</b>	<b>\$3,749,208</b>

### Construction Projects

In 2009, construction was performed to renovate the Embassy Theatre's third floor in preparation for a walkway to join the Embassy to the new downtown Marriott hotel. In 2010, the bridge connecting the walkway was constructed. These events alone cost over \$1.75 million dollars, and employed many Allen County residents. Similar to other economic expenditures, these construction jobs also involve the churning of expenditures as businesses buy supplies from other Allen County businesses and employees spend their wages and recirculate those funds in Allen County. It is estimated that this two-year project added a substantial impact to the county's economic base and also contributed through the additional employment in this construction. As the Embassy considers further projects, the additional impacts on the county should not be overlooked. For this project alone, the direct construction effect on Allen County was over \$1.5 million dollars. Note that as is the case with many construction projects, the bulk of the expenses stay within the county. After the multiplier is applied, the effect was \$2.16 million in additional sales in Allen County. In addition, this project provided the equivalent of 14 full time jobs annually, or 22 FTE after including multiplier effects.

## Embassy Attendees and the Impact on Downtown Fort Wayne

As part of this year-long study investigating the impact of the Embassy Theatre on the economy of Allen County, an additional analysis was done to analyze the relationship between the Embassy Theatre's patrons and downtown businesses. The results presented below are not a net additional impact to the data presented in the section above; nor is it a subset of that data. Rather, the data comes from both in-county residents as well as from out-of-county residents and seek to identify the amount of money that is spent on a downtown business as a result of an Embassy event.

Note that additional events are included in this analysis. Some of the events scheduled at the Embassy, such as "Be A Tourist in Your Own Hometown", high school graduations, and weddings which were not included as part of the visitor impact, are included in this section as we look at the impact of Embassy events on downtown. There were certain events in which the Embassy plays a role in downtown activities, such as The Indiana Music Educators Association (IMEA) conference as well as for some who attended the Festival of Trees, but similar to our treatment in the main report, "full credit" for drawing the patrons downtown is not given in these situations.

**Dining:** Over \$770,000 in downtown restaurant dining can be directly attributed to the Embassy Theatre.

**Lodging:** Given that 88 percent of the Embassy patrons are from less than an hour away (see Appendix F), it may be expected that lodging and accommodations were not a major factor. However, a respectable \$184,000 in downtown lodging dollars is attributed to the Embassy. The new Courtyard by Marriott downtown opened at the beginning of the 2010-11 season, and beginning that year, two hotels are within a block of the Embassy Theatre.

**Parking:** The Civic and Harrison garages parking income exceeded \$55,000 during the past season directly as a result of Embassy events.

**Gasoline and Convenience Stores:** A few years ago, there was one gas station on Broadway, and now there are three in the downtown area. This provides a convenience to some Embassy patrons who do not live in Allen County<sup>11</sup>, and there is at least \$11,000 of downtown gasoline sales were attributed to Embassy patrons. This does not include any possible gasoline purchases made by show buses and trucks. Since there is some uncertainty where those gas purchases were made, we excluded them from consideration.

**In total, sales of at least \$1,021,095 occurred in downtown Fort Wayne as a result of Embassy operations.**

To try to put this in some context, it may be helpful to have an idea of what constitutes a "normal downtown year" in terms of sales, especially with regard to the dining and lodging portion of these expenses. The geographic borders of Downtown Fort Wayne were identified in earlier in this report, and for this small of an area, it is difficult to gather good economic data defining this base area. We are going to make the assumption, backed up by a combination of EMSI zip code data for 46802 and the Census' *On the Map* data, that the sales data for Accommodations and Food Services for 46802 closely approximates the downtown area<sup>12</sup>.

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<sup>11</sup> We did not survey local county residents on their use of downtown the gas stations.

<sup>12</sup> Even though downtown only represents less than 10 percent of the land in 46802, there are a limited number of restaurants in this area. The other major location for restaurants in this area would be the area near Jefferson Pointe which is in a different zip code.

	<b>Total sales for 46802</b>	<b>Adjusted for Downtown Portion</b>	<b>Attributed to Embassy Theatre</b>	<b>Embassy Percent of Adjusted Total</b>
Accommodations	\$8.6 M	\$8.6 M	\$.184 M	2.1%
Restaurants	\$23.2 M	\$15 M	\$.771 M	3.3%

The downtown accommodations industry can attribute over 2.1 percent of their lodging sales directly to events at the Embassy. In addition, the Embassy events also account for over 3.3 percent of the downtown food services restaurant sales.

In addition, we have included information on the Dine and Ride Program in Downtown Fort Wayne in Appendix G. This is a free park and ride program which recently experienced some budget cut-backs and in the 2011-12 season is only being offered at the Broadway at the Embassy shows. At the time of our survey, it was also offered for Philharmonic events.

## Appendices

### Appendix A: Philharmonic

The original intent of the survey was not to provide separate information on each type of show that is offered by the Embassy, but a separate patron-survey was done in order to make certain that our survey results included the Philharmonic patrons. Since the Philharmonic patrons represent almost 25 percent of all Embassy patron attendees, it was important to have this demographic represented in our survey results. Since the data is available, and statistically valid for this group, this information is offered as an appendix, and this additional breakout information may provide some insights.

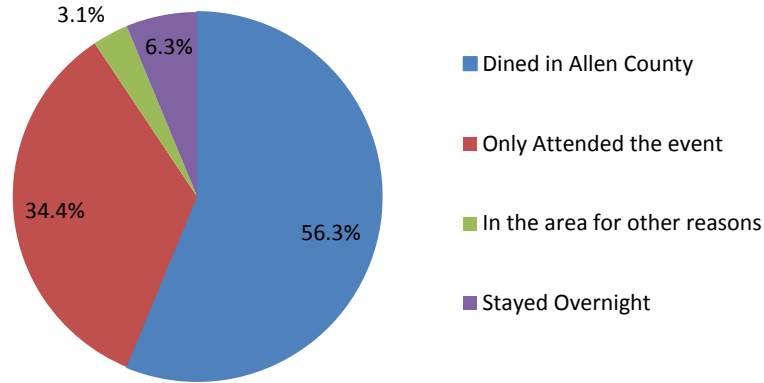
Although Philharmonic patron at the Embassy had the opportunity to complete an on-line web-based survey as did all Embassy attendees, a patron intercept survey was conducted at a Masterworks concert in November. This was done to be certain that the Philharmonic audience was represented when the impact of visitors was calculated. It turned out that over the course of a year, the Philharmonic patrons completed the on-line survey at a rate just slightly less than the non-Phil patron. We were prepared to analyze the results on the patron intercept survey to represent the Masterworks audiences, but that is not necessary. The data below is collected from the entire season, and since this is a larger sample with more responses, the data is more reliable.

There were a total of 592 surveys completed for Philharmonic events: Masterworks or full orchestral works, and the Pops Concerts. Attendance at all Philharmonic Pops and Masterworks events, excluding the October Family Concert was 26,067 during the 2010 season.

Although the survey results discussed in the main portion of this paper represent an entire season for the Embassy Theatre, within each group certain nuances exist. One of these has already been introduced-the percentage of the visitors is different depending on the type of event-an observation which is most likely extremely obvious to Embassy management. Overall, the percentage of visitors for the entire season was 32.5 percent, and for the Festival of Trees, the mix was approximately 25 percent. The average percentage of visitors for all Philharmonic events at the Embassy was 16.2 percent, but even within the Phil there are differences: For Masterworks concerts, 13.2 percent of the audience were from out of county and for the Pops concerts, that percent was 19.7. All data shown below is representative of the entire season; that is, it is combined and represents both Pops and Masterworks concerts.

Three percent of all visitors (or 0.5 percent of all Philharmonic attendees) were in Allen County for other reasons and indicated they decided to attend an event because they were here. This may be good information for the Downtown Improvement District and the Embassy to know; that is, that visitors who are here for other reasons will add an activity such as a Philharmonic Concert to their schedule. This is a baseline number; it may be interesting to see if some type of marketing geared to hotel guests or conference attendees would increase this.

**Philharmonic Attendees from Outside Allen County**



Regarding party size: Our intent was to capture financial information, and we asked people to identify a party as one in which they could identify these details. For example, we wanted those who traveled in a bus group to respond to financial questions for themselves and not for the total group because they most likely would not know the details for the total group. Similarly, if two couples met and dined together prior to the show, if they had separate bills, we didn't want one couple to assume they knew what the other couple was spending. Therefore, party size is not necessarily a group attending an event at the Embassy together.

	Total	From out of county	Allen County
Average Party Size	2.43	2.69	2.39

Note: Mode for all was 2.

From this point, we are excluding those who attended but were in town for other reasons from the analysis. Note that the impact details below are subsets of the amounts identified in the main body of the report.

Thirty percent of all Philharmonic Allen County parties visited a restaurant before the Embassy event, and practically all dining from Allen County residents was in an Allen County restaurant. Visitors from outside Allen County ate out at a twice the rate of the local residents: 64.5 percent of all visitors visited a restaurant<sup>13</sup>. Both of these statistics reflect less dining out is occurring at both the visitor and resident rates for all Embassy patrons, as well as a lower dinner bill per party.

	From out of county	Allen County residents
Percent of Parties who ate in a restaurant in Allen County before or after Embassy event	64.5%	30.0%
What percent used a downtown restaurant (e.g. of those dining, the percent of Philharmonic patrons who ate downtown )	42.6%	55.4%
Average Dinner Bill Per Party	\$57.48	\$51.93

Downtown Improvement District may be able to market downtown dining to more visitors in town for a Philharmonic event since not as many dine Downtown as Allen County residents, although dining out is done more frequently in general for visitors. That is, they apparently want to dine in Allen County, but not downtown.

<sup>13</sup> This may in fact be larger. We surveyed the 6.3 percent who stayed overnight differently. Those parties are completely excluded from this calculation.

Visitors (excluding those who stay overnight-these are shown separately): A party who ate in Allen County spent an average of \$57.48. In addition, there were overnight visitors whose data was collected differently. For their visit, they spent an average of \$112.50 per party for the duration of their stay. Together, this is an annual equivalent of \$63,823 in new direct dining dollars attributable to Philharmonic patrons.

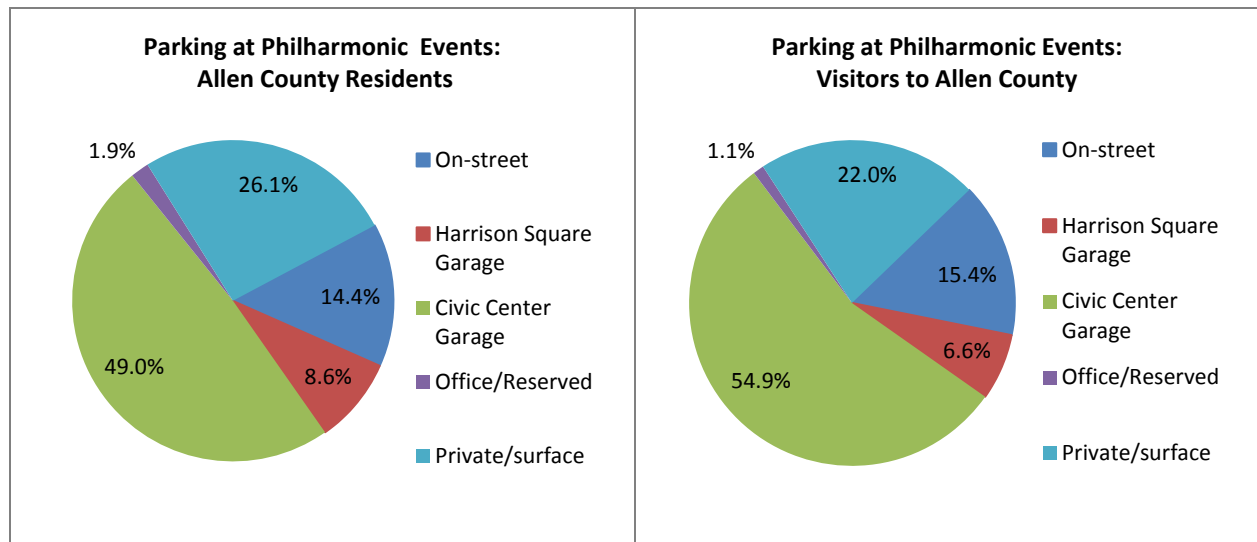
Excluding those who said they were in town for other reasons, six percent (6.4) stayed overnight. None of these stayed in a downtown hotel: one third stayed with friends or family; two-thirds stayed in a hotel in Allen County not located downtown.

On average, a party staying overnight spent 1.3 nights in Allen County. This average party spent \$87.50 per night, or a total of \$140 per party for the entire trip on accommodations. This is an annual equivalent of \$13,702 in new direct lodging dollars attributable to Philharmonic patrons, but none of it is allocated to downtown hotels.

**Other Observations:**

Approximately 79 percent of all visitors to Allen County to attend a Philharmonic event do not take in any activities, such as shopping or visiting museums, while they are in Allen County. Of those that indicated that they do include another activity, the most common was shopping or movies. 10.8 percent of all visitors identified that activity. Other activities which were indicated include the Allen County Library for genealogy research, events at the Grand Wayne Center, the Foellinger-Freimann Botanical Conservatory, Science Central, and visiting Fort Wayne Parks, Downtown holiday exhibits, and family events. The average amount spent per party on these events was (those who spent) \$78.20, or an average of \$16.82 for all visiting parties.

Philharmonic patrons, both visitors and residents have one major parking dissimilarity with the overall seasonal parking patterns-there is substantial more private or surface lot parking with Philharmonic patrons.



A greater percentage of Philharmonic visitors went to the concession stand when compared to the typical patron but spent less per party: 37.4 percent of Phil visitors spent an average of \$8.26. Only 29 percent of Allen County residents went to the Embassy's concession stand, and this was a greater percentage compared to the residents throughout the season re and their average bill was \$7.48.

## Appendix B: Sample Survey

### Allen County Resident Survey

1. Are you a resident of Allen County Indiana? If yes, please continue. If no, please pick up a blue survey.
2. What event did you most recently attend at the Embassy Theatre? \_\_\_\_\_
3. Where did you park to attend this event at the Embassy?
  - a. Civic Center Garage (connected to Hilton Downtown)
  - b. Harrison Square Garage (southwest of the Embassy)
  - c. On-street
  - d. Private/surface lot
  - e. Office/reserved parking
4. Do you agree with the statement: "The Embassy and Fort Wayne are an affordable experience"?
  - a. Yes
  - b. No
5. How did you hear about this event? *Select all that apply.*
  - a. TV
  - b. Magazine
  - c. Newspaper
  - d. Radio
  - e. Prior Community Event
  - f. Search Engine
  - g. [www.fwembassytheatre.org](http://www.fwembassytheatre.org)
  - h. [www.VisitFortWayne.com](http://www.VisitFortWayne.com)
  - i. [www.downtownFortWayne.com](http://www.downtownFortWayne.com)
  - j. Ticket Master
  - k. Other Internet Site (please specify) \_\_\_\_\_
  - l. Other (please specify) \_\_\_\_\_
6. Will you come back to another event at The Embassy?
  - a. Yes
  - b. No
7. Would you recommend The Embassy to a friend?
  - a. Yes
  - b. No
8. How many were in your party at the event indicated above? \_\_\_\_\_  
*A party is defined as a group attending the event together and sharing expenses. If you were a member of a group sale or bus tour, please respond for just yourself, i.e. "a party of one".*
9. Did your party visit a restaurant before the Embassy event?
  - a. Yes (continue on to question #10)
  - b. No (skip to question #11)

10. Please indicate where the restaurant you visited is located.
  - a. Downtown Fort Wayne-please reference the Downtown Dining Guide at the end of the survey for a list of Downtown restaurants. Please enter amount, including tax and tip -  
\$ \_\_\_\_\_
  - b. Fort Wayne/Allen County, but not in Downtown Fort Wayne
  
11. Did your party visit an establishment for dinner, desserts, or drinks after the event at the Embassy?
  - a. Yes (continue on to question #12)
  - b. No (skip to question #13)
  
12. Please indicate where the restaurant you visited is located.
  - a. Downtown Fort Wayne -please reference the Downtown Dining Guide at the end of the survey for a list of Downtown restaurants. Please enter amount, including tax and tip -  
\$ \_\_\_\_\_
  - b. Fort Wayne/Allen County, but not in Downtown Fort Wayne
  
13. Thank you for visiting The Embassy Theatre. Is there anything additional we can do to make your experience more enjoyable?



### Non-Allen County Resident Survey

1. Do you live in Allen County Indiana? If yes, please pick up a yellow survey. If no, what is your zip code?  
\_\_\_\_\_
2. What event did you most recently attend at the Embassy Theatre? \_\_\_\_\_
3. Where did you park to attend this event at the Embassy?
  - a. Civic Center Garage (connected to Hilton Downtown)
  - b. Harrison Square Garage (southwest of the Embassy)
  - c. On-street
  - d. Private/surface lot
  - e. Office/reserved parking
4. Do you agree with the statement: "The Embassy and Fort Wayne are an affordable experience"?
  - a. Yes
  - b. No
5. How did you hear about this event? *Select all that apply.*
  - a. TV
  - b. Magazine
  - c. Newspaper
  - d. Radio
  - e. Prior Community Event
  - f. Search Engine
  - g. [www.fwembassytheatre.org](http://www.fwembassytheatre.org)
  - h. [www.VisitFortWayne.com](http://www.VisitFortWayne.com)
  - i. [www.downtownFortWayne.com](http://www.downtownFortWayne.com)
  - j. Ticket Master
  - k. Other Internet Site (please specify) \_\_\_\_\_
  - l. Other (please specify) \_\_\_\_\_
6. Will you come back to another event at The Embassy?
  - a. Yes
  - b. No
7. Would you recommend The Embassy to a friend?
  - a. Yes
  - b. No
8. How many were in your party at the event indicated above? \_\_\_\_\_  
*A party is defined as a group attending the event together and sharing expenses. If you were a member of a group sale or bus tour, please respond for just yourself, i.e. "a party of one".*
9. Which of the following statements best applies to you and your party?
  - a. We (I) only attended the event at the Embassy and returned home. (skip to question #17)
  - b. We (I) ate in Fort Wayne or Allen County before or after the event and returned home. (continue to question # 10).
  - c. We (I) stayed overnight in Fort Wayne or Allen County. (skip to question #12)
  - d. We are (I am) in the area for other reasons, either personal or business, and decided to include an Embassy event while we were (I was) here. (skip to question #11)

10. Please indicate where the restaurant you visited is located.
  - a. Downtown Fort Wayne- please reference the Downtown Dining Guide at the end of the survey for a list of Downtown restaurants. Please enter amount, including tax and tip -\$\_\_\_\_\_ (skip to question #15)
  - b. Fort Wayne/Allen County, but not in Downtown Fort Wayne. Please enter amount, including tax and tip -\$\_\_\_\_\_ (skip to question #15)
  - c. Not in Fort Wayne/Allen County (skip to question #15)
  
11. Did you stay overnight in Fort Wayne/Allen County?
  - a. Yes- number of nights: \_\_\_\_\_
  - b. No (skip to question #13)
  
12. What type of accommodations did you have?
  - a. Downtown Hilton or Courtyard by Marriott Downtown. Please enter amount spent on accommodations for your stay in Fort Wayne/Allen County -\$\_\_\_\_\_
  - b. Other Fort Wayne/Allen County hotel. Please enter amount spent on accommodations for your stay in Fort Wayne/Allen County -\$\_\_\_\_\_
  - c. Bed & Breakfast in Fort Wayne/Allen County. Please enter amount spent on accommodations for your stay in Fort Wayne/Allen County -\$\_\_\_\_\_
  - d. Stayed with friends or family
  
13. Approximately how much did you spend on food (including tax and tip) for your party during your stay in Fort Wayne/Allen County? \_\_\_\_\_
  
14. Of the above total from question #13, would you please indicate or break out costs, including tax and tip where applicable. Please reference the Downtown Dining Guide at the end of the survey for a list of Downtown restaurants.
  - a. Downtown restaurants, hotel food and beverage, coffee shops, etc.: \_\_\_\_\_
  - b. Restaurants, coffee shops, etc. not in Downtown Fort Wayne: \_\_\_\_\_
  - c. Fort Wayne/Allen County grocery stores, convenience stores or similar: \_\_\_\_\_
  
15. Please circle all attractions, features, or special events you visited while in Fort Wayne/Allen County on this trip. If you did not participate in any activities please select "None".
  - a. Allen County Library, including the Genealogy Center
  - b. Any of the Fort Wayne Museums
  - c. Attended a meeting or event at the Grand Wayne Center
  - d. Attended a sporting event, meeting, trade show, or exhibition at the Allen County War Memorial Coliseum
  - e. Cinema Center, ArtLink, Art Galleries
  - f. College, High School, or Youth Events
  - g. Fort Wayne Children's Zoo
  - h. Foellinger-Freimann Botanical Conservatory
  - i. Holiday activity or activities (i.e. Festival of Lights, Gingerbread House Festival)
  - j. Science Central
  - k. Shopping or Movies (Rave, Carmike, Regal)
  - l. Other, please specify: \_\_\_\_\_
  - m. None, we (I) did not engage in any other locally sponsored activities while in Fort Wayne/Allen County

16. Approximately how much did you and your party spend in total on these activities?

\_\_\_\_\_

17. Did you purchase gasoline while in Fort Wayne/Allen County?
  - a. Yes (continue to question #18)
  - b. No (skip to question #20)
  
18. Approximate dollar amount spent on gasoline in Fort Wayne/Allen County? \_\_\_\_\_
  
19. Did you visit one of the gas stations located downtown?
  - a. Yes
  - b. No
  
20. While at the Embassy, did you purchase any souvenirs (clothing, CDs, etc.)?
  - a. Yes - Please enter amount- \$ \_\_\_\_\_
  - b. No
  
21. While at the Embassy, did you visit their concession stand?
  - a. Yes - Please enter amount- \$ \_\_\_\_\_
  - b. No
  
22. Thank you for visiting The Embassy Theatre. Is there anything additional we can do to make your experience more enjoyable?

## Appendix C: Results of Perception Questions

A number of questions were asked which could provide feedback to the Embassy Theatre and are included below. These were not directly involved in the economic impact analysis.

A. The responses below are from the events at the Embassy in which surveys were conducted, with the exception of “Festival of Trees”, which are broken out and are listed in the section below.

1. Do you agree with the statement “The Embassy and Fort Wayne are an affordable experience?”

	Yes, agree
Allen County Residents	95.8%
Visitors	95.3%

2. “How did you hear about this event?” (more than one response accepted)

Note: Embassy received this information immediately following events and can match marketing to specific event.

	Allen County Residents	Visitors
TV	15.8%	10.6%
Magazine	1.9%	1.1%
Newspaper	27.7%	15.3%
Radio	18.8%	21.2%
Prior Community Event(a)	8.3%	4.1%
Search Engine	1.5%	6.1%
Embassy Web Site	13.3%	13.6%
Fort Wayne Web Site (www.VisitFortWayne.com)	0.4%	1.4%
FW Downtown Web Site (www.downtownFortWayne.com)	0.7%	0.6%
Ticket Master	13.6%	24.9%
Other Internet Site (b)	4.5%	13.2%
Other (c)	33.2%	10.2%

a) Many of the responses in the “Other” category could have been assigned to this option.

b) There were responses in the “Other” category which may have been internet sites.

c) The summary of responses in “Other” are categorized or listed below.

**PERCENT OF RESPONSES TO THE ANSWER OF “OTHER” from above question “How did you Hear of this Event?” Note that “Other” was 33.2% of total responses for residents, and 10.2 % for visitors.**

	Allen County Residents	Visitors
Season Ticket, subscription, tradition	41.2%	20.2%
A contact (family, friends, etc.)	22.8%	37.7%
Embassy or Phil Mailing, Email	16.9%	16.7%
Embassy Marquee	3.7%	3.5%
Miscellaneous Other	3.7%	4.4%
Other Marketing (e.g. posters, phone)	2.7%	8.8%
Group	2.2%	1.0%
Gift	1.7%	1.8%
Other web site or Facebook	2.0%	2.6%
Connection with Embassy or Phil (many responses here indicated “member”)	1.5%	3.5%
Involved in Event, usually as a performer	1.5%	0%

3. "Will you come back to another event at The Embassy?"

	Yes
Allen County Residents	99.4%
Visitors	98.9%

4. Will you recommend The Embassy to a friend?

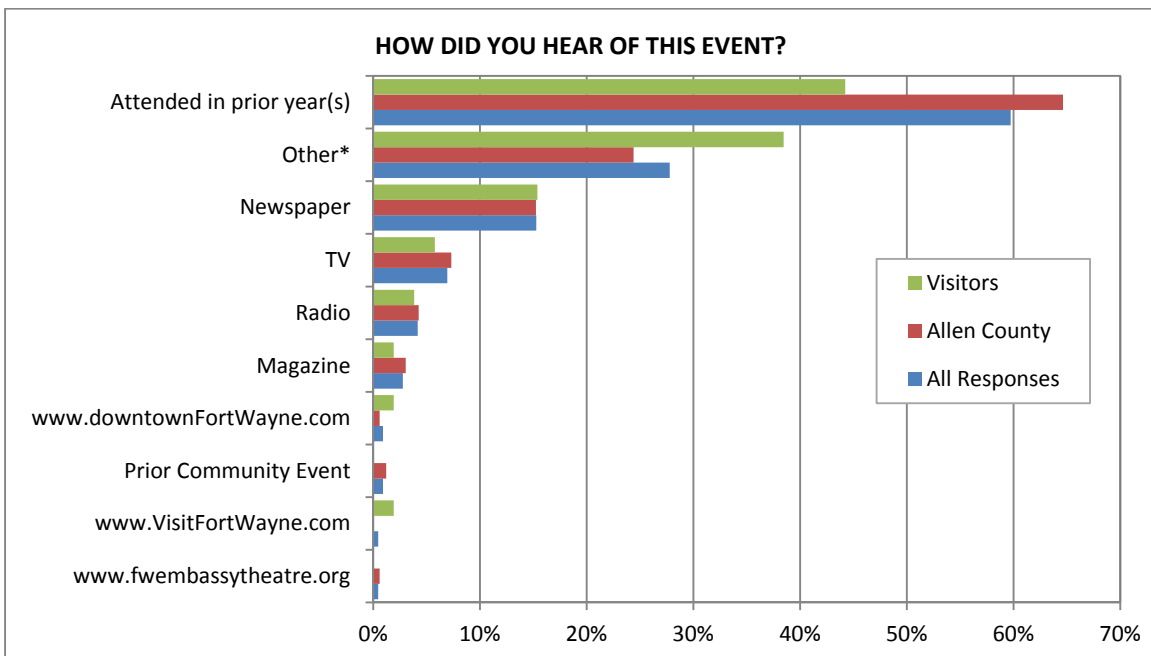
	Yes
Allen County Residents	99.2%
Visitors	99.1%

B. The responses below are from "Festival of Trees". Additional information has been included below from the surveys taken during this event.

1. Do you agree with the statement "The Embassy and Fort Wayne are an affordable experience?"

- Yes: 95.4 %
- No: 3.2 %
- Not Certain: 1.4%

2. "How did you hear about the Festival of Trees?" (more than one response accepted)



\*Other: The vast majority of visitors who indicated "Other" indicated that their child or family member was involved in the performance at the Festival of Trees. Additional responses included some connection to the decorated trees: "Friend worked on a tree, company has tree, etc". There were several "spur of the moment" type responses, such as "hotel recommended it", visitors were at other downtown holiday events and decided to check out the Festival of Trees.

3. "Will you come back to another event at The Embassy?"

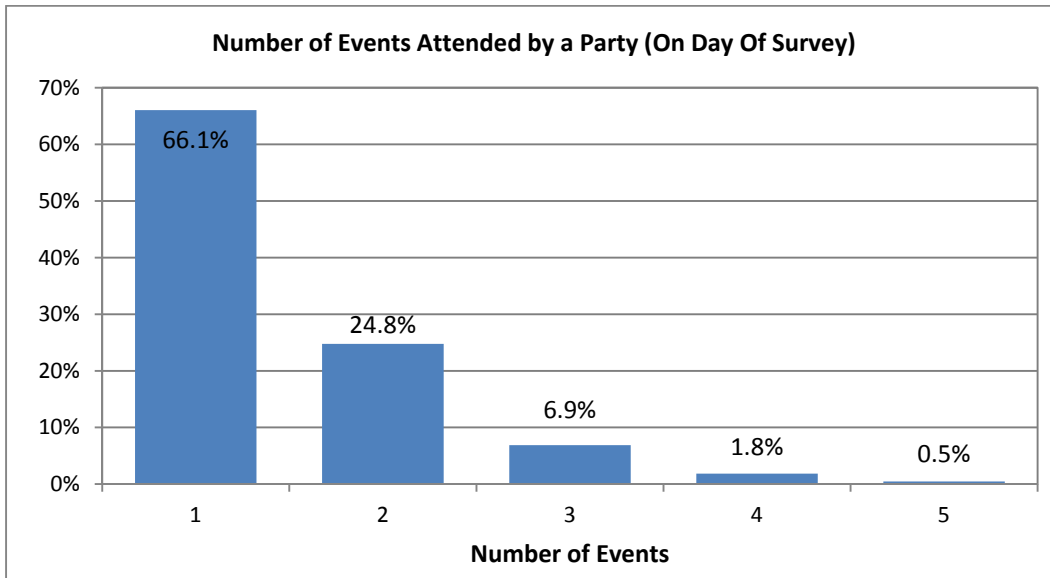
	Yes
Allen County Residents	99.4%
Visitors	98.0%

4. Will you recommend The Embassy to a friend?

	Yes
Allen County Residents	100%
Visitors	98.1%

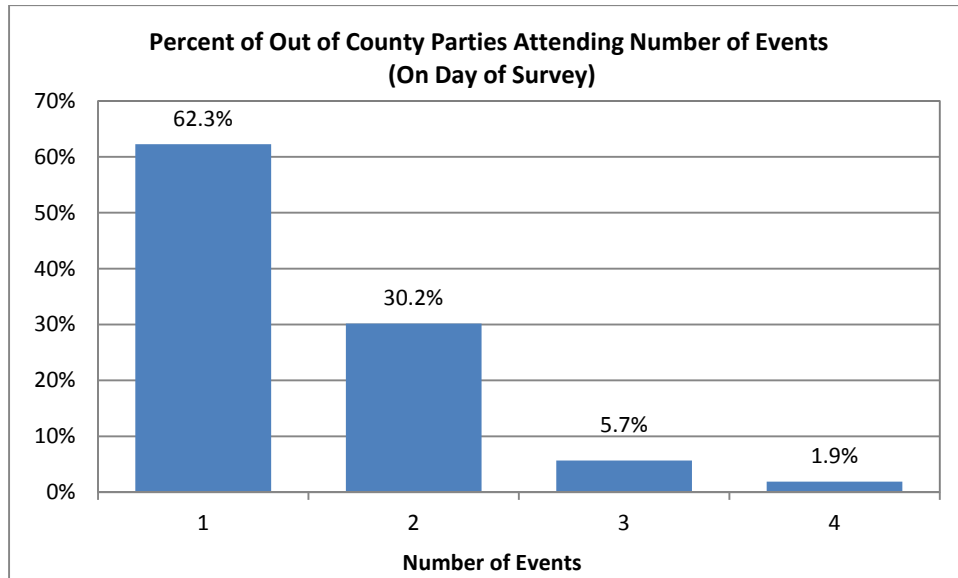
5. Number of events attending while downtown for Festival of Trees

Patron intercept surveying took place from Wednesday (aka "Thanksgiving Eve") November 24, 2010 through Sunday, November 28, 2010. For these patron intercept surveys, the questions were tailored to only identify events occurring on the day of the survey so that respondents would not accidentally identify an event that they did not attend. In addition to the survey intercept method, electronic surveys were also available to patrons. Seventeen percent of all surveys were completely electronically, and those respondents had the entire list of activities to choose from although there were reminders that certain activities were only open on certain days. Overall, 66.1 percent of all Embassy<sup>14</sup> parties indicated that they would be attending just the Festival of Trees.

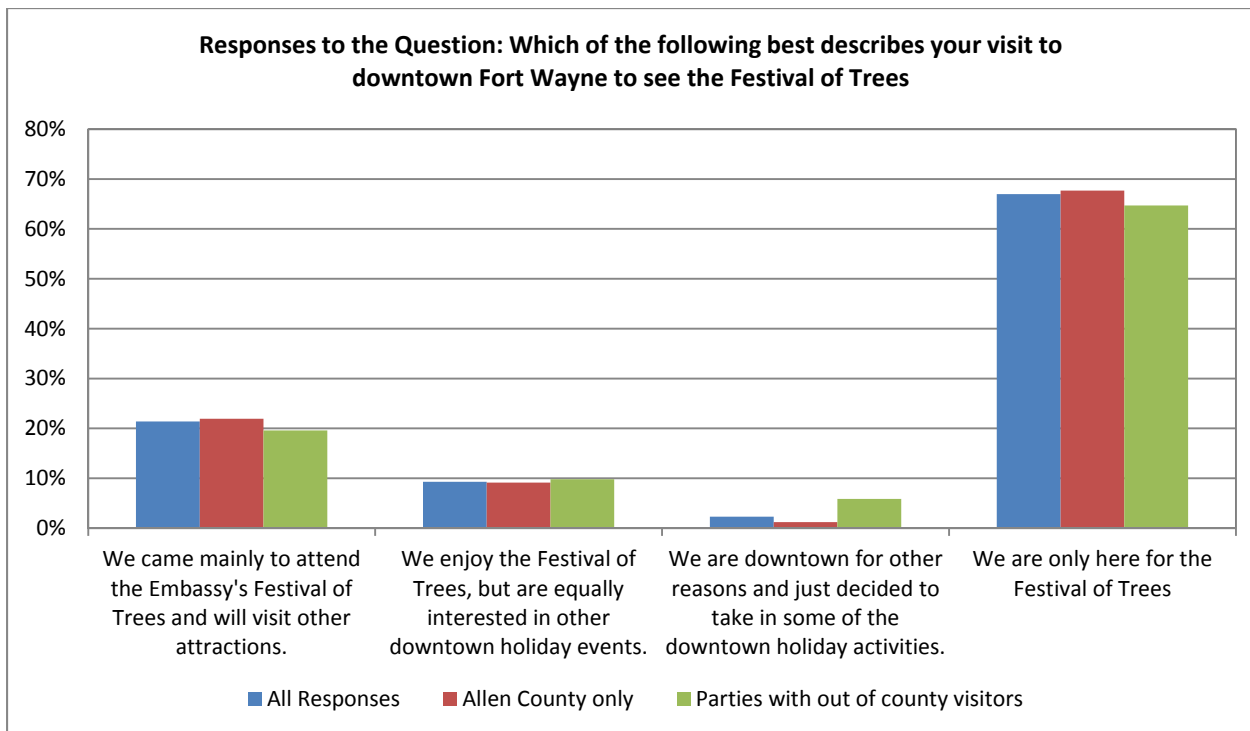


Results were slightly different for parties from outside Allen County (either consisting of a mixed Allen County and out of county visitor group or a group entirely from outside Allen County). More parties added an event in addition to the Festival of Trees:

<sup>14</sup> There may have been parties at only one event elsewhere downtown, but our survey was concerned with Embassy parties.



6. As shown in the next table, 67 percent of all respondents indicated that their main purpose for the visit to downtown or their travel to Allen County was to attend the Festival of Trees. Responses were similar for both in county and out of county visitors.



Keep in mind that the attendees at the Festival of Trees were the focus of the survey. Every respondent attended this event. Other events downtown undoubtedly had their unique patrons, but it was not the purpose of this survey to determine the patronage of all events or to what degree these activities worked together to draw people downtown.

The table below indicates the events which were visited in conjunction with the Embassy of Trees. A larger response rate for certain events may be related to the fact that the activity took place over several days. Perhaps the most helpful observation is the fact that a third of the people coming downtown for the Festival of Trees take in other activities.

Downtown Events Indicated:

<b>Same Day Activity Response:</b>	<b>Percent of All Responses</b>	<b>Number of days event occurred simultaneous to Festival of Trees surveying ( Wednesday-Sunday)</b>
We only attended the Embassy's Festival of Trees	66.1%	5
Night of Lights	6.4%	1
Santa's Workshop at the Community Center	0.0%	1
Festival of Gingerbread at the History Center	11.0%	4
Holiday events at the Botanical Conservatory	8.3%	2
Holiday Houses for Habitat at the Grand Wayne Center	13.3%	5
Festival of Trains at Science Central	0.9%	3
Home for the Holidays at Parkview Field	3.7%	2

*Note: In determining the economic impact, we will not include responses from those who were in downtown for other reasons.*



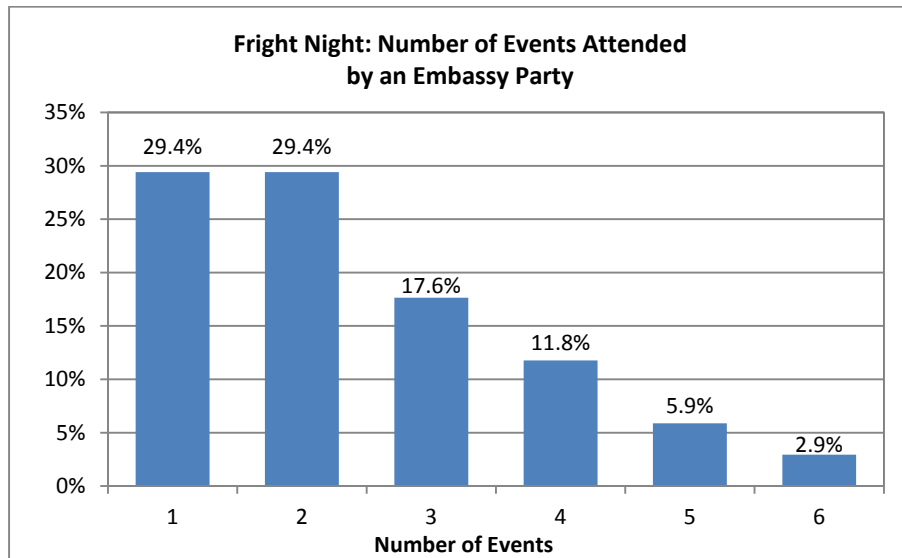
## Appendix D: Additional Information from the Fright Night Surveys

### Downtown Fright Night with Emphasis on the Embassy and Indiana Hotel Lobby Perception and General Information Responses:

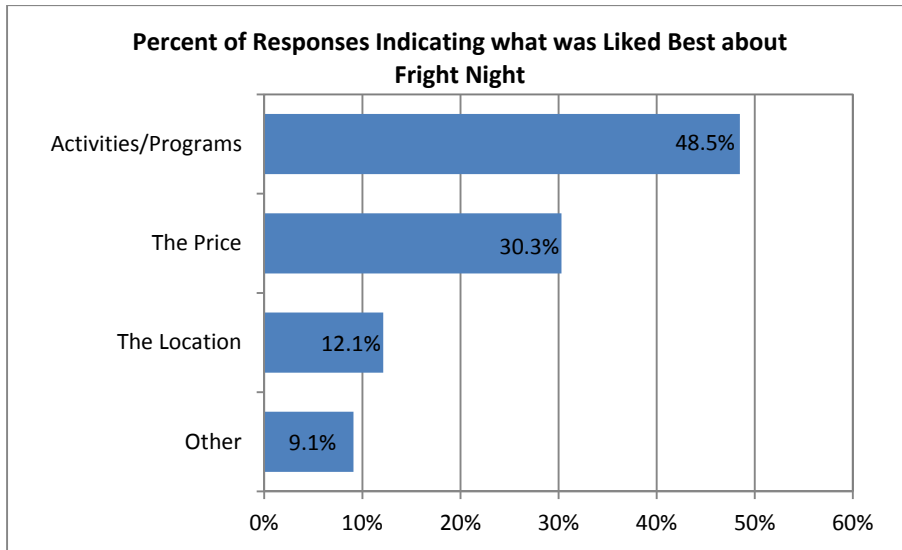
Thirty-four surveys were completed for Fright Night 2010. This represented 111 individuals. Eight-two percent lived in Allen County, and 17.6 percent traveled from Huntington, Kosciusko, Steuben, and Wells County into Allen County for this event.

The Halloween Spooktacular, Arch Tours, T.A.G. Art and Arch stories, Nosferatu and the Grande Page Organ, and Embassy Tales: Beyond the Darkness, and "Other" were identified as part of Downtown Fright Night. Respondents were asked to identify the events they attended, and were given the opportunity to rate that activity.

Respondents indicated that, on average, they attended more than two events (the average was 2.4 events). The chart below identifies the percentage of events that the parties attended. Note that other events such as the Zombie Walk, Rocky Horror Picture Show, music and scavenger hunt at Parkview Field and other events occurred downtown, but the survey was designed to capture events occurring at the Embassy and Indiana Hotel Lobby. Respondents were given the opportunity to write-in one other event.



Respondents were also asked "What did you like best about Fright Night 2010?" The chart below identifies those responses, and the choice "activities and programs" was identified by almost half of the respondents.

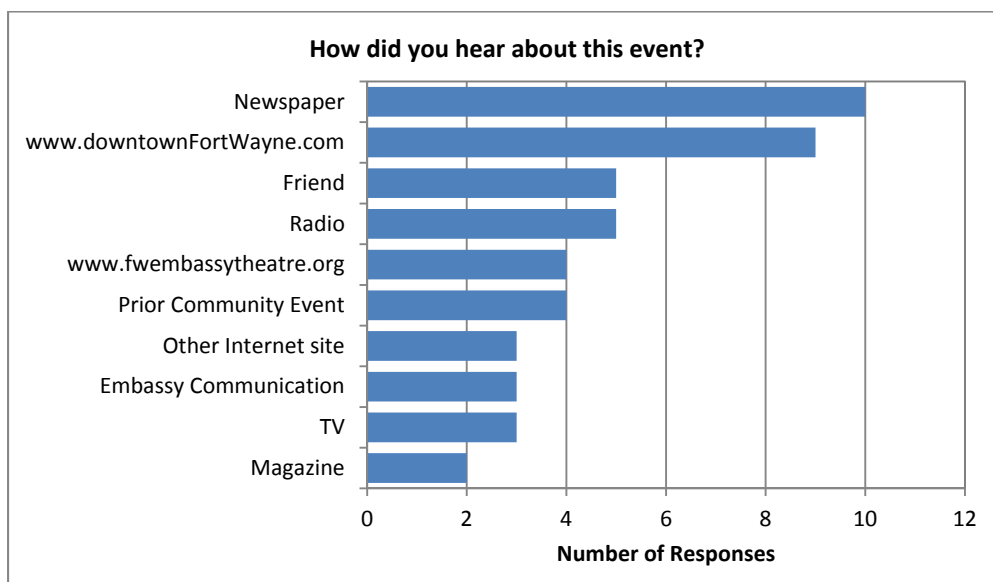


Some of the responses associated with “Other” include: The chance to experience something unique; all of the above; and the beauty of the Embassy.

Of those who identified “activities” as the best feature for Fright Night, there was a range of responses for the favorite activity: Nostferatu with the Grande Page Organ led the way with 37.5 percent of the responses, followed by a tie with Halloween Spooktacular and Embassy Tales: Beyond the Darkness at 25 percent each, and ARCH Tours received 12.5 percent of the vote. Almost every respondent in this category attended more than one event, so there was some flexibility to actually choose or identify a favorite activity or program.

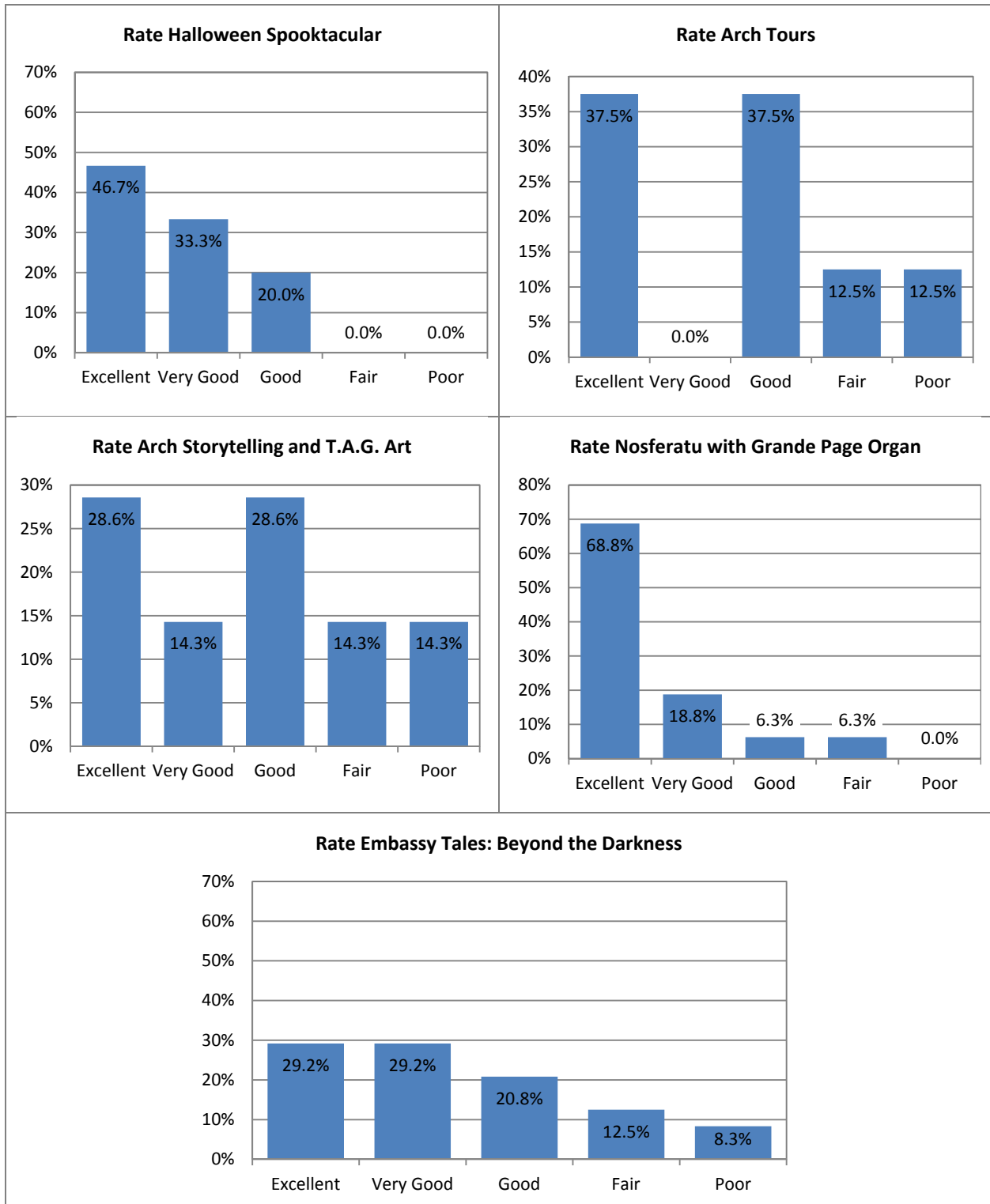
***How did you hear about this event (Fright Night)?***

There was no limit on the number of sources respondents could indicate. The majority indicated that they heard about the event from a newspaper or the Downtown Improvement District’s website, [www.downtownFortWayne.com](http://www.downtownFortWayne.com). Total responses are indicated in the chart below.



Parties from outside Allen County indicated that they heard about the event mainly from the newspaper and from communications from the Embassy (brochure and website).

**How Would You Rate Your Experience at the Following Events at Fright Night 2010?**



Attendees were invited to identify and rate other events going on during Fright Night.

	<b>Zombie Walk/ parade</b>	<b>History center/Old City Jail</b>	<b>Magician Terry Owens</b>	<b>Parkview Field /Music and Scavenger Hunt</b>	<b>Rocky Horror Picture Show</b>
Excellent	1	1	1	1	
Very Good	3				1
Good		1		1	

Pfeiffer House Ghost Hunt was identified, but no rating was given.

## Appendix E: Identification of Activities and Events Occurring at the Embassy during 2010-2011 Season

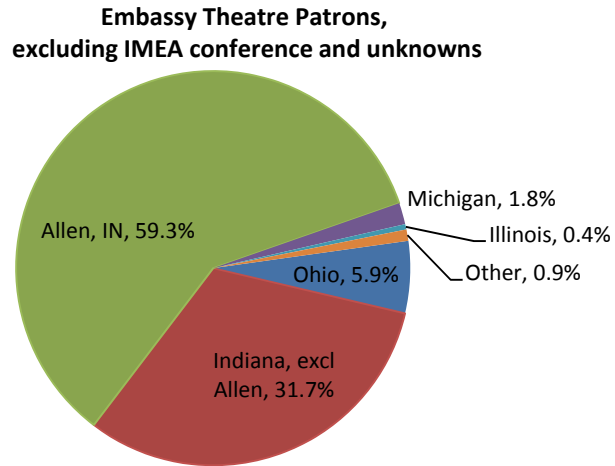
Event:	Date:	Used in Calculations for Impact?
FWPhil MW #1	9/11/10	Yes
Be A Tourist In Your Own Hometown	9/12/10	Yes-just for Downtown
Jamey Johnson	9/16/10	Yes
Bill Engvall w/FW Children's Foundation	9/24/10	Yes
Straight No Chaser	9/25/10	Yes
FWPhil Pops #1	10/2/10	Yes
Goo Goo Dolls	10/5/10	Yes
Tim Allen	10/7/10	Yes
FWPhil MW #2	10/16/10	Yes
Legally Blonde	10/17/10	Yes
Cheech & Chong	10/21/10	Yes
Rodney Carrington	10/22/10	Yes
FWPhil Family Concert	10/23/10	No
Nosferatu with Dennis James	10/23/10	Yes
Embassy Tales: Beyond the Darkness	10/23/10	Yes
Mike Epps	10/31/10	Yes
Math the Magic w/Bradley Fields	11/1/10	No
FWPhil MW #3	11/6/10	Yes
A Chorus Line	11/7/10	Yes
John Mellencamp	11/16/10	Yes
FWPhil Pops #2	11/19/10	Yes
FWPhil Pops #2	11/20/10	Yes
Festival of Trees (FOT)	11/23 - 30	Yes, reviewed independently
Celtic Thunder	12/1/10	Yes
FWPhil Holiday Pops	12/10/10	Yes
FWPhil Holiday Pops	12/11/10	Yes
Concordia HS Christmas Program	12/12/10	No
Grease	12/13/10	Yes
Mannheim Steamroller	12/15/10	Yes
FWPhil Holiday Pops	12/17/10	Yes
FWPhil Holiday Pops	12/18/10	Yes
FWPhil Holiday Pops	12/18/10	Yes
Bob & Tom	12/31/10	Yes
FWPhil MW #4	1/15/11	Yes
IMEA: General Session	1/21/11	Reviewed Independently of other events, and partially included as a contributing impact.
IMEA: Junior All-State Band	1/21/11	
IMEA: Children's & Middle School Honors Choir	1/21/11	
IMEA: Headliner Concert	1/21/11	
IMEA: Honor Band	1/22/11	
IMEA: Orchestra	1/22/11	
IMEA: Choir	1/22/11	
The Color Purple	1/25/11	Yes
Lyle Lovett & John Hiatt	2/5/11	Yes
Riverdance: Farewell Performance	2/9/11	Yes
FWPhil MW #5	2/12/11	Yes
Menopause the Musical	2/15/11	Yes
Menopause the Musical	2/16/11	Yes
Menopause the Musical	2/17/11	Yes
The Color Purple	1/25/11	Yes
Down the Line 5	2/19/11	Yes

Spring Awakening	2/23/11	Yes
FWPhil Pops #3	2/25/11	Yes
FWPhil Pops #3	2/26/11	Yes
Clay Aiken	3/2/11	Yes
FWPhil SP Pops #4 Video Games Live Bonus Round	3/4/11	Yes
Larry the Cable Guy	3/5/11	Yes
Garrison Keillor	3/8/11	Yes
FWPhil MW #6	3/12/11	Yes
Joe Bonamsasa	3/15/11	Yes
Young Peoples Organ Concert - Irene Ator	3/20/11	Yes
Bill Cosby	3/26/11	Yes
FWPhil Pops #5 Rogers & Hammerstein Celebration	4/1/11	Yes
FWPhil Pops #5 Rogers & Hammerstein Celebration	4/2/11	Yes
Madagascar Live	4/5/11	Yes
Madagascar Live	4/6/11	Yes
Nexstar Dance Competition	4/9/11	No
FWPhil MW #7	4/16/11	Yes
Embatini	4/20/11	No
Jerry Seinfeld	4/22/11	Yes
FWPhil MW #8	5/7/11	Yes
Buddy Nolan Memorial Organ Con.	5/8/11	Yes
FWPhil Youth Performance	5/10/11	No
FWPhil Youth Performance	5/11/11	No
FWPhil Youth Performance	5/11/11	No
Monty Python's Spamalot	5/18/11	Yes
Bishop Dwenger Graduation	5/27/11	Yes-just for Downtown
Concordia HS Graduation	6/5/11	Yes-just for Downtown

## Appendix F: Geographic Origin of Audiences

The Embassy Theatre welcomed guests to the 2010-2011 season from 44 counties in Indiana, 15 states, and Canada during the 2010-11 season, as well as a majority from Allen County. Note that this data excludes those attending the IMEA conference, as well as any weddings, special events, or other conferences. In addition, there are a number of attendees who indicated they were not from Allen County, but did not indicate a zip code<sup>15</sup>. These unknowns are excluded from this summary.

In addition to this information, the table below identifies the drive time statistics, as well as the county location of the patrons.

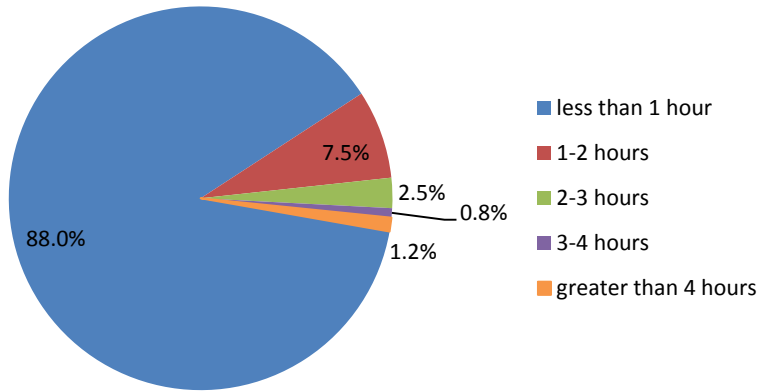


Excluding the Allen County patrons which comprise approximately 60 percent of the known Embassy patrons, the table below identifies the dominant areas from which most Embassy patrons originated.

Location of Patrons	Percent of Total Including Allen County	Percent of Total Excluding Allen County
DeKalb	4.29%	10.6%
Huntington	3.71%	9.1%
Whitley	3.42%	8.4%
Noble	2.68%	6.6%
Steuben	2.49%	6.1%
Adams	2.44%	6.0%
Wells	2.44%	6.0%
Kosciusko	2.24%	5.5%
Michigan	1.76%	4.3%
Other States	0.93%	2.3%
Van Wert, OH	0.88%	2.2%
Wabash	0.83%	2.0%
Paulding, OH	0.78%	1.9%
Allen, OH	0.68%	1.7%
Marion	0.68%	1.7%
St Joseph	0.68%	1.7%
Defiance, OH	0.54%	1.3%
LaGrange	0.49%	1.2%
Illinois	0.44%	1.1%

<sup>15</sup> Note that this percentage is slightly different than the 32.5 percent out of county visitors identified in the report. This is due to some survey nuances—we asked if they were from Allen County and we asked for zip codes. The zip code response was optional or not a forced response for some surveys. In addition, in the main body of the report, we estimated out-of-county visitors based on hotel registrations for IMEA conference, but we cannot identify their county location for the above summary, and therefore those numbers are excluded from this appendix.

### Travel Time to Embassy Events



As shown in this chart, 88 percent of the patrons traveled less than an hour to attend an event at the Embassy. This includes Allen County residents.



## Appendix G: Dine & Ride

During the 2010-11 season, a free park and ride program was offered by the Downtown Improvement District, the Fort Wayne Philharmonic, and the Embassy Theatre. Free transportation was available before and after each show to one of seven participating restaurants<sup>16</sup>. While these organizations no doubt kept records on the number of participants, we have the data to compare if there were measureable differences in dining patterns on evenings when Dine & Ride was offered.

Excluding those who stayed overnight, when Dine & Ride was not offered, 51.9 percent of the patrons ate in a restaurant before a show, and of these, 46.1 chose a downtown restaurant.

When Dine & Ride was offered, i.e. during a subscription event, 44.8 percent of the patrons ate in a restaurant, and of these, 48.7 chose a downtown restaurant.

There is a slight advantage to the downtown restaurants when Dine & Ride was offered. Since the Dine and Ride was offered at Broadway at the Embassy and at the Philharmonic Masterworks and Pops concerts (we can refer to these as the “subscription events” although single tickets are available), these can sometimes be very different than the comedy or touring act type of show and attract a different type of patron. More people came from out of town for the comedy/touring act shows<sup>17</sup> and therefore it is not surprising that a larger percentage attending these “non-subscription” events ate in Allen County. What may be interesting is to determine if the cancellation of Dine & Ride for the Philharmonic Series made any difference in these patrons’ dining decisions.

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<sup>16</sup> In 2010-11, those restaurants were Club Soda, Hall’s Gas House (& Takaoka), Henry’s, JK O’Donnell’s, Toscani’s, Bourbon Street Hideaway, and the Dash-In.

<sup>17</sup> Our data indicates that almost 40 percent of the audience was from out of county for the non-subscription type shows. In the report, we state that approximately 32.5 of the audience overall was from out of county, and for Philharmonic, this was closer to 19 percent.