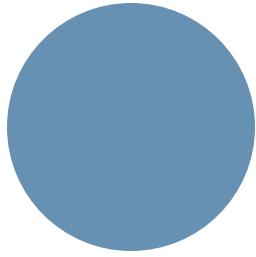


# Tompkins County Room Tax Investments 2004-2016

Prepared for the Tompkins County Strategic Tourism Planning Board, Winter 2017

Dylan Tuttle, Cornell University Department of City & Regional Planning



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# 1

## Important Terms

### Room Tax

Hotel room occupancy tax collected at the county level, at the current rate of 5% of the cost of a room for properties with 11 or more rooms, and 3% for smaller properties.

### Tompkins County Tourism Program (TCTP)

The collection of grant and non-grant programs structured for the distribution of room tax funds for the benefit of tourism in Tompkins County and to improve the quality of life for the community as a whole. Does not include administrative expenses taken from room tax funds.

### Strategic Tourism Planning Board (STPB)

The County's appointed tourism board that guides the TCTP and advises the County Legislature on use of room tax funds.

### Grants

The part of the TCTP distributed on an individual competitive grant basis.

### Non-grant programs

The part of the TCTP distributed on an annual budgetary basis. Within the report, these programs are referred to with a lowercase "p" to distinguish from the Tourism Program as a whole.

***Individual programs that are part of the Tompkins County Tourism Program, and for which data was collected and analyzed, are listed in this table***

#### Non-Grant Programs

- Convention & Visitors Bureau
- Beautification, Signage & Public Art
- Community Arts Partnership (CAP) Operating Support
- Discovery Trail
- Workforce Development
- Tompkins Festivals Program
- Market the Arts
- County Historian
- Tourism Partner Award
- Strategic Planning & Staffing
- The Ticket Center (No Longer Active)

#### Grants

- Arts & Cultural Organizational Development Grants (ACOD)
- Tourism Capital Grants (TCG)
- Tourism Project Grants (TPG)
- New Tourism Initiative Grants (NTI)
- Marketing & Advertising Grants (TMA)
- Strategic Tourism Implementation Grants (STI)
- Community Celebrations Grants (CC)

#### Grant Administration

- ACOD Admin: CAP
- TCG Admin: TCAD

#### General Support/Administration      TCAD

- The County 10%
- Tompkins County Area Development (TCAD) Operating Support

# Program Descriptions

## **Grants:**

- **Arts & Culture Organizational Development Grants** strengthen large existing arts and culture organizations with long term financial planning and development tools.
- **Community Celebrations Grants** support observances, commemorations, jubilations, inaugurations, presentations, or other “red letter days” or salutes that have meaning for the community.
- **Tourism Project Grants** support tourism- generating single projects.
- **Tourism Capital Grants** expand major visitor- generating facilities, and fund feasibility studies for potential projects.
- **Tourism Marketing and Advertising Grants** help promote events and projects likely to attract visitors in a manner consistent with the CVB’s marketing strategy.
- **New Tourism Initiative Grants** support significant new tourism generating initiatives that flow from and are consistent with the Strategic Tourism Plan.
- **Strategic Tourism Implementation Grants** support significant implementation of critical actions identified in the 2020 Strategic Tourism Plan and related tourism implementation plans.

## **Non-grant programs:**

- **Convention and Visitors Bureau (CVB)** enhances economic development through promotion of local activities and assets to visitors as well as residents. The CVB is the County’s designated Tourism Promotion Agency.
- **Beautification, Signage & Public Art** improve way finding signage to direct travelers to key destinations and beautify communities to welcome visitors, especially at gateways.
- **Workforce Development/TC3 Customer Service** creates a career ladder for entry-level jobs in the tourism industry and provides training to improve the visitors’ experience.
- **Community Arts Partnership – Assistance with CAP Operating Expenses** strengthens the visibility of Tompkins County’s thriving arts community.
- **Festivals Program** provides technical assistance, coordination, and resource sharing for local festivals at a macro level to enhance their effectiveness.
- **County Historian** provides a historical connection to today’s tourism events and projects.
- Strategic Planning and Staffing maximizes tourism program effectiveness and reduces volunteer STPB workload on program administration through sustainable staffing, leadership and research.
- **Discovery Trail** provides collective marketing for eight local organizations that have a dual mission of education and tourism promotion: PRI- Museum of the Earth, Cornell Lab of Ornithology, Cornell Plantations, Herbert F. Johnson Museum of Art, Cayuga Nature Center, Sciencenter, The History Center, and Tompkins County Public Library.
- **Market the Arts** collectively markets Tompkins County’s artists and features them on one website to allow them to sell their work; includes but is not limited to the members of the Greater Ithaca Art Trail.
- **Tompkins Tourism Partner Award** recognizes volunteer efforts to attract large groups, meetings or conventions to Tompkins County.
- **Community Arts Partnership (CAP) - Downtown Ticket Center** supported a joint ticketing venue for major performing arts venues until it closed in 2013.



## 2

## Executive Summary

This report describes investments made by the Tompkins County Tourism Program (TCTP) under advisement of the Strategic Tourism Planning Board (STPB) from 2004-2016. Its goal is to provide an objective breakdown of past grant and non-grant program allocations, to help guide the board in refining future investment choices. It is a descriptive, not prescriptive, report, with the exception of a short discussion of possible policy implications in the conclusion.

The Tompkins County Tourism Program, active since the late 1980s, strives to be both progressive and analytical in its management. At the heart of that goal is an insistence on making decisions based upon hard data and bold ideas, not upon intuition and historical precedent alone. The Tompkins County 2020 Strategic Tourism Plan contains a directive to: "Develop Program Assessment Criteria – metrics used to assess the return on investment or value of investment of individual tourism programs and projects—for each program funded by the Tompkins County Tourism Program" (pg. 5). This report stems from that directive, and will be especially useful when combined with additional efforts, such as a planned Visitor Profile Study, to be launched in 2017. The timing of these projects is significant: the increase in hotel rooms in Ithaca may result in an increase in room tax dollars, making it an opportune time for the TCTP to refine its long-range vision for tourism investment.

# Principle Findings

1. Over \$24 million in room tax funds was distributed from 2004-2016. Total annual distribution more than doubled between 2004 and 2016.

With the exception of slight decline during the height of the 2008-2009 recession, distribution of room tax funds increased steadily throughout the study period, from \$1.136 million in 2004 to \$2.35 million in 2016.

2. Non-grant programs consistently made up about 60% of total room tax investments, while grants made up around 30%. Administrative functions and TCAD accounted for around 10%.

These percentages have been consistent over the years, save for 2008, when a substantially greater percentage of the budget went to grants, and the last three years, when the general support percentage rose as Operating Support for Tompkins County Area Development was added.

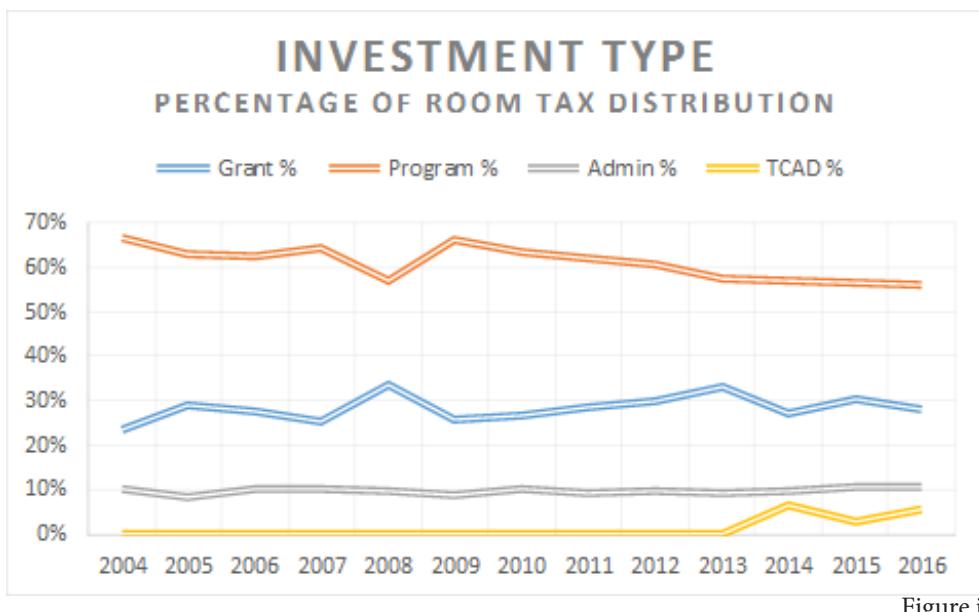


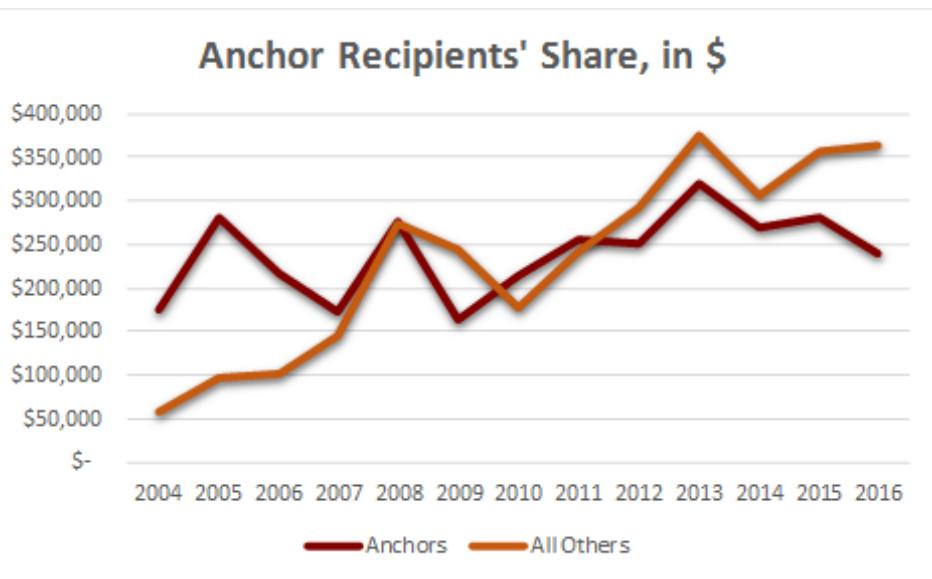
Figure i

3. Of 71 different tourism grant recipients (not including Community Celebrations Grants), 56 (79%) received fewer than ten grants during the study period.

The majority of grantees apply to the TCTP on a project-specific basis. This includes 19 recipients who received only one grant.

4. A small, core group of institutions have received a substantial portion of grant funding, but funding to those organizations has plateaued in recent years, while small grants to a wider variety of recipients has increased.

A group of nine recipients, referred to in the report as “anchor” recipients, combined to receive 62% of grant funds during the study period. That share has, however, declined in recent years, although funding in real terms has remained fairly level.



"Anchor" Recipients:

- PRI/Museum of the Earth
- Hangar Theatre
- The State Theatre
- Kitchen Theatre
- The Sciencenter
- The History Center
- Cayuga Nature Center
- Cayuga Chamber Orchestra
- Downtown Ithaca Alliance

Figure ii

**5. 101 different events and exhibits were supported by 267 grants (not including Community Celebrations) during the study period**

About half of these events/exhibits received more than one grant during the study period, and 29 received grants in multiple years.

**6. Eight major grant-funded capital projects accounted for about \$940,000, 13% of total grant investment.**

The eight projects, funded by Tourism Capital Grants, include six institutional projects (including the Finger Lakes Wine Center opening and the Cayuga Nature Center renovations) and two infrastructure projects (the ongoing Stewart Park improvements and the Waterfront Trail).

**7. 13% of grant funding went to projects and institutions that no longer exist.**

The majority of this went to two projects: the Finger Lakes Wine Center and the Light in Winter Festival.

**8. 28% of grant funding went to projects that are still extant, but no longer seek TCTP funding.**

The vast majority of this was Tourism Capital Grants support for anchor recipient projects. A portion also went to successful annual events that no longer seek TCTP funding, and to completed tourism infrastructure projects.

**9. The 60/40 split between Marketing and Product Development was consistently met, especially over the last 6 years.**

Despite regular demand-based shifts in grant allocation away from the budgeted total, the 60/40 Marketing and Product Development split has remained consistent. An exception is the 2008-2009 period, when the recession forced substantial budget changes.

**10. Grant investment in short-term projects (events and exhibits) increased as a percentage of total grant spending, from an average of 17% in 2004-2009 to an average of 31% in 2010-2016.**

This increase occurred between 2007 and 2011, and has remained consistent since that time. The shift can be traced to an increase in the number of grants for events/exhibits, while average award amounts for both long and short term grants remained consistent.

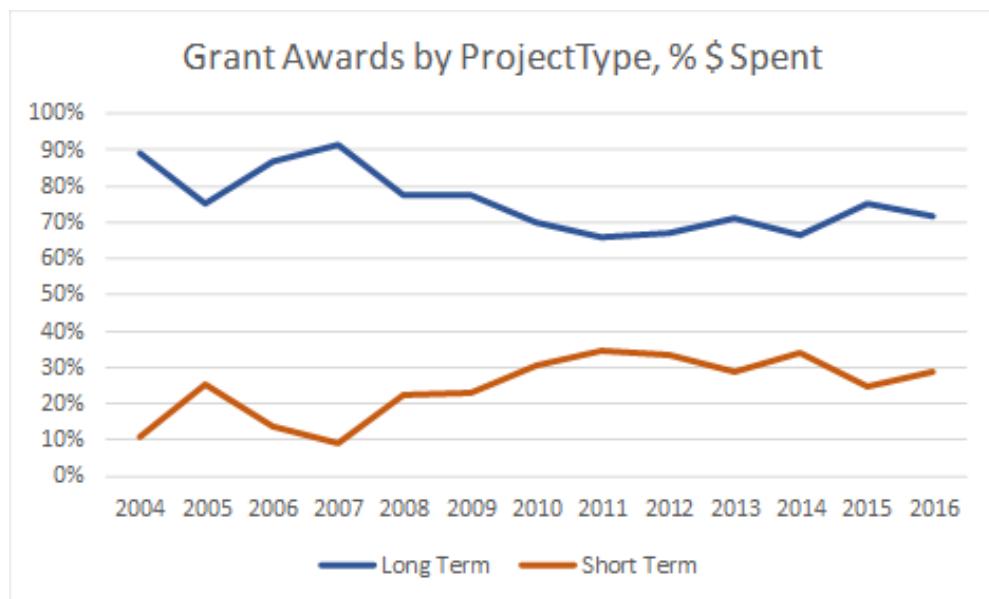


Figure iii

**11. Seasonality: A large majority of grants were for projects which have multi-season or year-round impact. Among season-specific grants, Shoulder Season investment increased, while grants for projects with peak season and Winter impact decreased.**

While only 54% of grants had a multi-season or year-round focus, those grants tended to be much larger, and account for 80% of total grant spending during the study period. Among the remaining 20%, grants emphasizing the Shoulder Seasons (roughly November-December and March-April) grew, while both Winter- and peak-focused grants decreased.

**12. Focus Areas: Among Established and Emerging Tourism Types (as defined in the 2020 Strategic Tourism Plan), Arts, Culture & Heritage Tourism saw the most investment, followed by Educational Tourism and Downtown Ithaca. All other tourism types saw substantially less investment.**

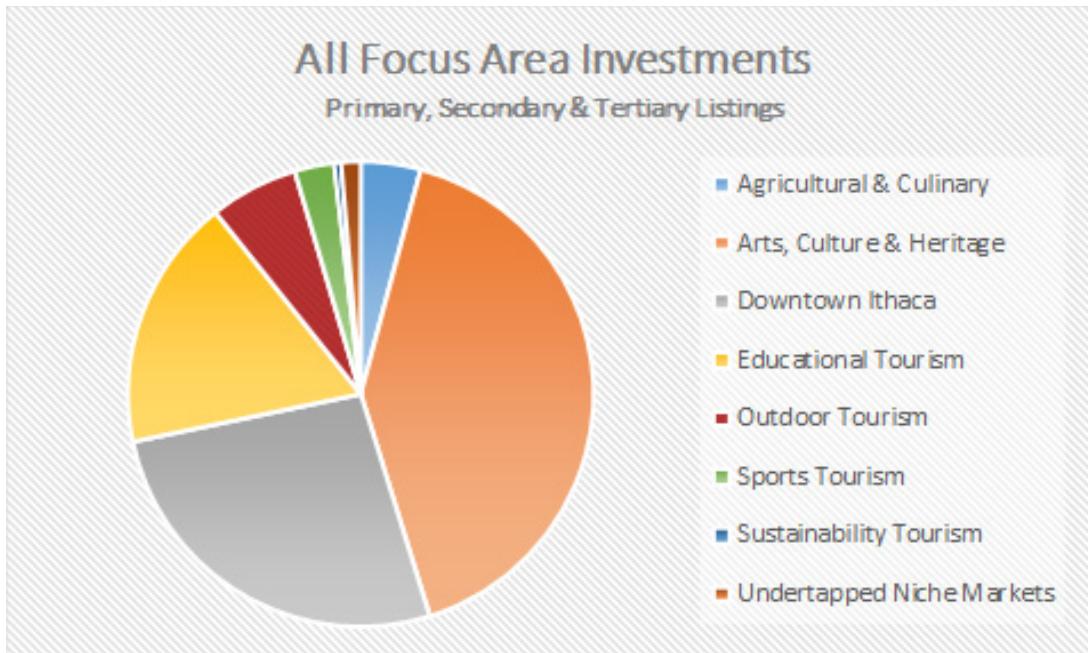


Figure iv

**13. The TCTP funded 17 Feasibility Studies during the study period, evaluating potential institutional investments, tourism infrastructure projects, and institutional partnerships.**

Five of these have been implemented, six are in the implementation stage, four are in progress, one was not implemented, and one was implemented but unsuccessful.

**14. Location: 65% of grants, and 68% of grant dollars spent, were linked to the City of Ithaca, but that share of the total generally decreased over the study period as more grant dollars went to county-wide or multi-municipal projects.**

Unsurprisingly, a large majority of grant investments focused on the City of Ithaca, Tompkins County's principle cultural and economic driver. A substantial percentage also went to county-wide or multi-municipal initiatives (12%), to the Town of Ithaca (11%), and to the Town of Ulysses (7%), while 1% went to the county's other 12 towns and villages. When Community Celebrations Grants—a key source of grant funding for many of the county's rural municipalities—are added, the percentage of funding awarded to those 12 triples.

# 3

## Questions Addressed

The overarching question that this report seeks to answer is: “*How has room tax been invested since 2004, and how closely have Tourism Program investments aligned with the Program’s stated goals?*” A number of more specific questions arise from that starting place, and each is described below.

- 1.** How much, in total, has been allocated by the Tourism Program since 2004?
  - How much has been spent on all investments within the Tourism Program?
  - How has that changed over time?
- 2.** How much in real dollars, and in percent of total room tax distribution, is going to each of the various investments that make up the Tompkins County Tourism Program?
  - What are the totals for each of the seven grant programs and 11 line-item budget programs overseen by the Strategic Tourism Planning Board during the study period? What are they for the County’s 10% administrative share, support for Tompkins County Area Development, and administrative fees associated with two of the grant programs?
  - How have those numbers changed over time?
- 3.** How have grant recipients and grant-funded projects changed since 2004?
  - How has the total number of recipients changed?
  - How have types of recipients evolved?
  - How much has been invested in individual events and projects?
- 4.** Which organizations have received grant funds? How much have they received, and how has the amount changed?
  - What have they received both in real dollars and as a percentage of overall distribution?
- 5.** How many Tourism Program-funded projects (since 2004) are no longer active?
  - What percentage of investments went to projects that are no longer active? What were the circumstances of those investments? When they were made and what type of projects were they?

**6.** How many Tourism Program-funded projects are still active, but no longer request TCTP support?

- What percentage of projects are still active, but are not currently seeking TCTP funding? What are the circumstances of those investments?

**7.** In what types of projects has the TCTP invested?

- What percentage of investments has gone to specific events, as opposed to long-term structural or organizational improvements?
- How much has been invested in product development, versus in marketing?
- What percentage of investment has each of the 15 Focus Areas in the 2020 Strategic Tourism Plan received?
- What percentage of investments have been geared towards off-season events and projects?
- How many feasibility studies have there been? What were they for, and what is their status?

**8.** How are investments distributed across the county, and how has that changed?

- Investment in events or projects centered in one of Tompkins County's 16 municipalities.
- Change in each municipality's share of the total over the 13 years of the study.

## *Part One: Data Sources and Quality*

Data for grants was initially compiled by Jackie Kippola, the staff member responsible for tourism administration in the Department of County Administration until 2011, and was further developed by Tom Knipe, Principal Planner/Tourism Program Director, after staff support for the Program moved to the County Planning Department. At that time, entries were categorized in a spreadsheet according to “Year”, “Type” of grant, “Recipient”, “Use/Project”, and “Amount”. From that point on, new grants were added annually. “Focus Area” columns were later added, but the current project represents the first time that all fields in the data table have been filled out completely. The same is true for additional columns for “Attendance” and “Out-of-County Attendance”, as well as for “Municipality”, which noted if the grant benefited a specific municipality within the county.

Before this report was begun, non-grant program entries were added, gaps in existing categories were filled in, existing data was cleaned for clarity and consistency, and five new categories were added. The new columns are “Product/Marketing”, which assigns a label of one or the other to each entry; “Project Type”, which labels each entry as Event/Exhibit, Infrastructure or Institutional-type spending; “Season”, which assigns a label of Peak, Shoulder, Winter or Multi-Season to a given entry; “Still Extant”, which asks if the investment was made in a use or project that is ongoing as of 2016; and “Still Funded”, which divides ongoing uses and projects by whether they are still funded by the Tourism Program.

This data was compiled from a wide range of sources. Basic grant data (Year, Type, etc.) was entered as the awards were delivered. Basic non-grant program data came from existing budget spreadsheets and the budget reports submitted by funded organizations. The amounts listed for each entry come from the modified budget, as opposed to the initially adopted one. Good record keeping practices means that the basic data is robust, and likely to be accurate and up-to-date. One minor discrepancy is that the grant amount listed represents the award given, not the actual funds paid, and occasionally the delivered amount has been less than the awarded amount, based on reassessment by the grantee. In recent years, where such aberrations are known, these entries have been amended, but in earlier years they represent data error. There are, however, very few of these, and the change in amount is most likely negligible.

Information for additional columns (Focus Area, Season, etc.) was gathered through online research and by speaking with those knowledgeable of the various events and organizations involved. Information on attendance was taken from grant reports submitted by grantees after the funded event takes place. Columns such as Focus Area, Municipality, and Project Type can be more subjective in nature, but were filled in with a uniform methodology that will be described in the next section. The sources used, including the Tompkins County 2020 Strategic Tourism Plan and recipient-specific online research, provide a solid framework for most of the columns and lead to reliable, highly useful data. The only notable weakness is the Attendance and Out-of-County Attendance columns. Participating organizations often have a limited capacity to take reliable attendance figures at events, and the Tourism Program is not able to monitor the accuracy of all of the numbers they are given. This makes calculating return on investment (ROI) a challenge. With that said, as will be shown in an exploration in the appendices, by taking a conservative approach and making some reasonable assumptions, it is still possible to reach a few important conclusions about the historic ROI of grant investments.

## *Part Two: Methodological Note*

Because the goal of this report is to describe TCTP investment distribution, as opposed to budgeted amounts, the grant data used for this report has been compiled based on distributed amounts and year of distribution, not on budgeted amounts or year of award. In addition, undistributed yearly reserves are not included. This means that grant totals in the report can differ significantly from those listed in budget reports, and that overall totals differ from budgeted amounts or actual room tax revenue. The report will use language throughout that reflects this important distinction.

Several sections of the analysis only consider grants. In these sections, Community Celebrations Grants are regularly omitted. This is the only grant type that does not require applicants to prove a tourism connection, and awards are often granted for events that do not cater to visitors. There will be reminders of this distinction in the analysis where appropriate.

The appendix contains additional information on methodology for each of the fifteen columns in the spreadsheet, for additional clarification or to serve as a reference for any future use of the spreadsheet. Where appropriate, question-specific methodological notes may also appear in the analysis chapter.



The remainder of the report will break down the data in myriad ways, in the process addressing each of the questions described in section two. The analysis is split into 5 sections:

1. Overall Totals
2. Grant & Program Descriptions
3. Grant Recipients & Grant-Funded Projects
4. Types of Investment
5. Geographic Distribution

Throughout the analysis, data that addresses the entire TCTP budget will often be presented both with and without the Convention and Visitor's Bureau budget. That budget makes up almost half of TCTP spending, and it is worthwhile to consider it both as a part of the Program and distinct from it. Likewise, because Community Celebrations Grants are not always expressly tourism-related, at several points data will be presented with and without those grants, as it is appropriate for the analysis.

While the analysis addresses funds distributed from 2004 (the first full year in which the occupancy tax rate was 5%) to 2016, there are a few key shifts during that period that are important to keep in mind. The first is the economic recession, which severely impacted occupancy tax revenue, especially in 2009. The second is that during a few years both before and after the recession, the opposite occurred: revenues from occupancy taxes exceeded expectations, and substantially more was collected than was budgeted. As discussed, this report considers neither budgeted amounts nor revenues, but actual fund distribution. The relationship between the three, with

fluctuating grant demand, revenue surplus rollovers, and multi-year grant awards, is complicated, as shown in Figure A, which compares them throughout the study period. The distinction between the three is important to keep in mind while reading the analysis.

Note: the budgeted amounts shown are for modified budgets, which incorporate past years' allocated but undistributed funds.

### Comparison of Actual Revenues, Budgeted Amounts, and Distribution

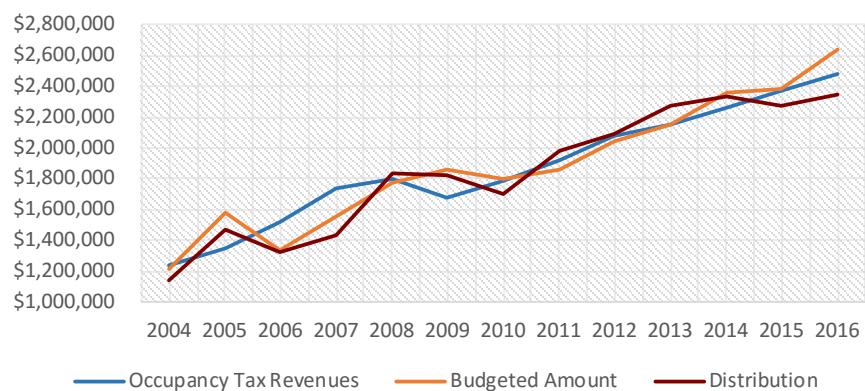


Figure A

The third important shift is that during the study period, a number of programs were added to the TCTP, which had implications for the budgets of existing programs. As shown in Figure B, six new programs, including the County Historian, the Festivals Program, and Market the Arts, were added in 2006-2009. Recession impacts caused three programs to go unfunded in 2010 (New Tourism Initiative Grants, Strategic Planning & Staffing, and Market the Arts), after which the number returned to twenty. Fluctuations in the latter part of the study period are due to the addition of Strategic Tourism Implementation Grants and Tompkins County Area Development Operational Support, as well as the closure of the Ticket Center.

### NUMBER OF PROGRAMS FUNDED CHANGE DURING STUDY PERIOD

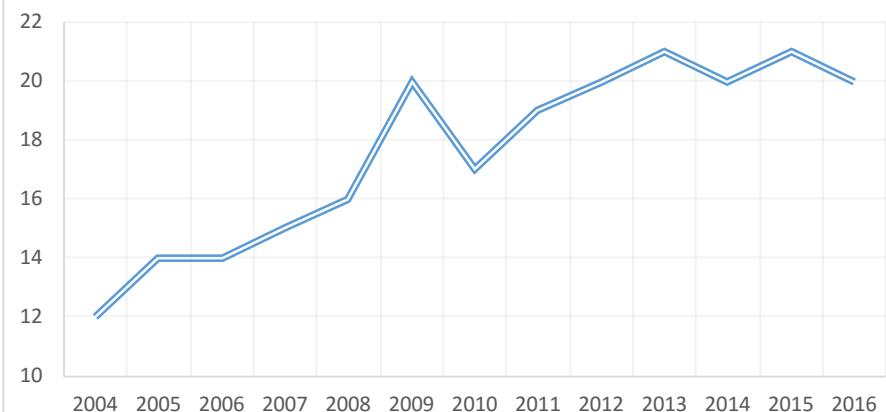


Figure B

# 1. Totals

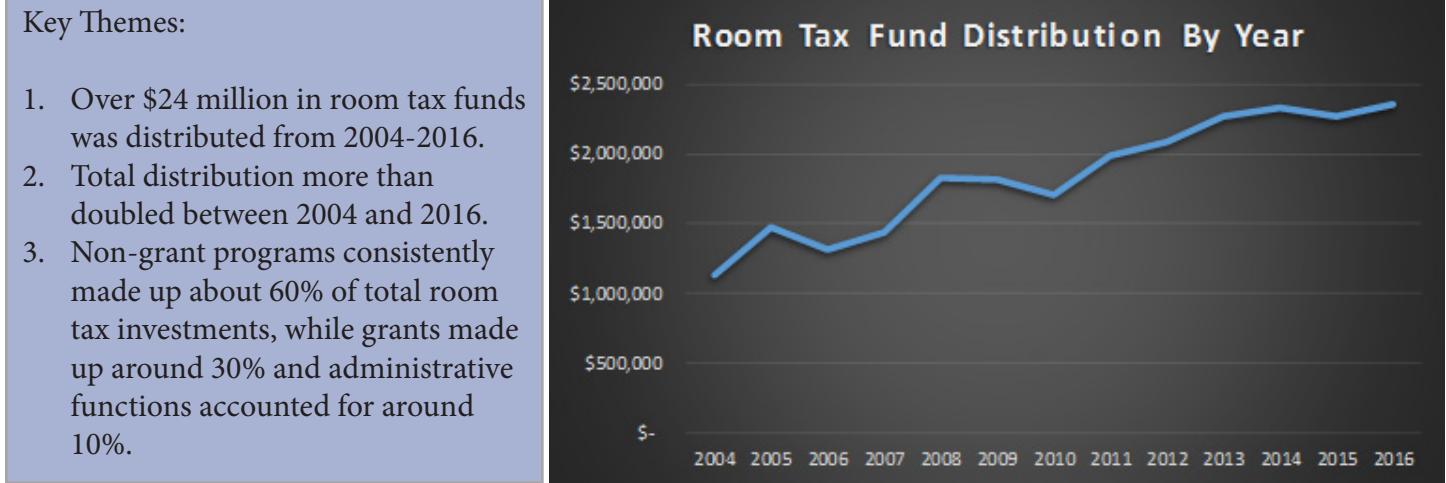


Figure 1-A

From 2004 to 2016, Tompkins County and the Tompkins County Tourism Program distributed \$24,025,507 in room tax funds collected by the county's hotels, motels and bed & breakfasts.\* That total rose from \$1,136,081 in 2004 to \$2,350,904 in 2016, a twofold increase. Of the \$24 million, \$2,663,648 went to administrative functions (the County 10%) and Operational Support for Tompkins County Area Development (TCAD). The Strategic Tourism Planning Board allocated the remainder, \$21,361,859, among eighteen different grant and non-grant programs and two sets of grant administration fees over the study period.

Grants and grant administrative fees made up about 29% of the total invested, or \$6,878,039. Line item non-grant programs accounted for 60%, or \$14,483,820, 75% of which is the CVB budget. The \$2,663,648 in administrative functions and TCAD support accounted for the remaining 11%.

As figure two shows, these percentages were consistent over the years, save for 2008, when a substantially greater percentage of the budget went to grants, and the last three years, when the administrative percentage rose as TCAD Operating Support was added.

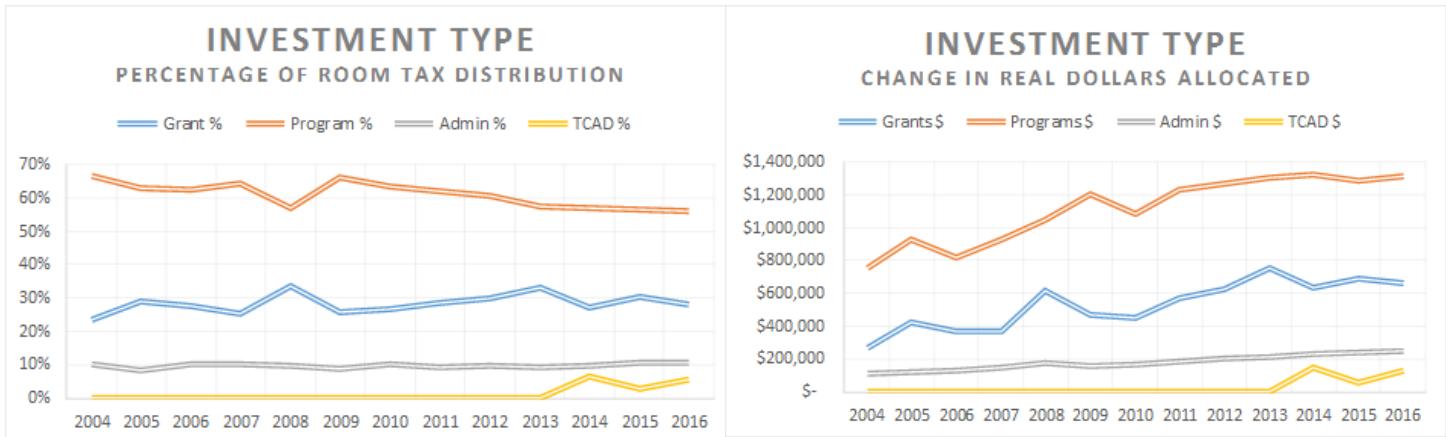


Figure 1-B

\*Beginning in mid-2016, funds were also collected from AirBNB stays.

## 2. Grant & Program Investments

In this section each of the seven grants, the two sets of grants administration fees, the eleven non-grant programs, the County 10%, and Tompkins County Area Development Operating Support (collectively referred to here as the “investments”) are explored. Following a written description of each is a graph that shows both the change in real dollars invested over the study period, and the change in the investment’s share of overall TCTP investment. Often, the relationship between the two is quite clear, but where it is not, a line of best fit has been added.

### Key Themes:

1. The majority of grant investments were inconsistent in their funding year-to-year. Many are dependent on external factors, such as the availability of qualified grantees or evolving administrative needs. For these inconsistent investments, changes in real dollars allocated and changes in percentage share of the total budget are generally very similar.
2. Of those that were consistently funded, increases in funding were generally not at the same pace as the increase in overall room tax investment. The total allocated to these investments in real dollars may have increased substantially, but their percentage share decreased. This can largely be traced to the growth of the TCTP to include new grant, program and administrative elements. As the total budget grew, in other words, so too did the number of investments sharing from it.

### *Part One: Grants*

The seven Tompkins County Tourism Program grants evolved considerably over the thirteen years of the study period. Only three were distributed in each of those years: Arts & Culture Organizational Development (ACOD), Tourism Capital Grants (TCG), and Community Celebrations (CC). The other five increased and decreased according to changes in demand and refinement of the Program. Tourism Marketing & Advertising (MA) grants and Tourism Project Grants (TPG) were distributed in every year from 2005. New Tourism Initiative (NTI) grants appeared in every year except 2007 and 2010. Strategic Tourism Implementation (STI) grants were first offered in 2013, and were only distributed in two years: 2013 and 2015.

Note: because the level of investment varies considerably, the scales of figures in this section also vary.

ACOD grants were the most consistently funded year-to-year among the grant types. 94 were awarded between 2004 and 2016, for a total of \$2,264,491, 9.4% of total room tax investment. The fewest awards distributed in one year was five, for 2004, and the most was 10, in 2016. The overall average awarded amount was \$24,090, but that number fluctuated somewhat over the years. It increased steadily from \$25,000 in 2004 to \$30,000 in 2008, before dropping to around \$20,000 from 2009-2012. It increased again to

around \$26,000 from 2013-2015, before decreasing once more in 2016, to around \$19,700, as three new partners were added to the mix of funded organizations due to a modification of the grant guidelines.

The smallest award was for \$5,000, a 2016 grant given to the Ithaca Shakespeare Company. The largest awards were three \$40,000 grants given to the Paleontological Research Institute (PRI) from 2013-2015. The Museum of the Earth and Cayuga Nature Center merged under PRI in 2013, and since that time they have been allowed to submit a request for double the current grant limit of \$30,000. Earlier on in the study period, that limit was somewhat higher. There were six grants awarded in 2006-2008 that are over \$30,000, which helps to explain the higher averages from those years. Overall, although real dollars allocated rose substantially during these thirteen years, ACOD's share of total room tax investment decreased by around 4%.

95 Tourism Capital Grants were distributed, totaling \$1,866,610. That was 7.8% of total spending. As detailed earlier, for the purposes of this study, TCG grants were listed according to the year in which they were delivered, not the year in which they were budgeted. Many of the grant amounts listed are part of a larger multi-year award. The annual number of delivered grants fluctuated over the years. Only 19 occurred from 2004 to 2008, but the number rose steadily, peaking at 14 in 2013. The largest TCG distribution at one time was for \$75,000, to the Museum of the Earth in 2005. That grant was part of a \$125,000 multi-year award budgeted in 2003 for the museum's building expansion. The smallest was a \$3,780 grant delivered to the State Theater in 2012 for a restroom enhancement feasibility study. As these grants are dependent upon appropriate capital projects, and funding has thus fluctuated, the real dollars allocated and percentage share lines are very similar.

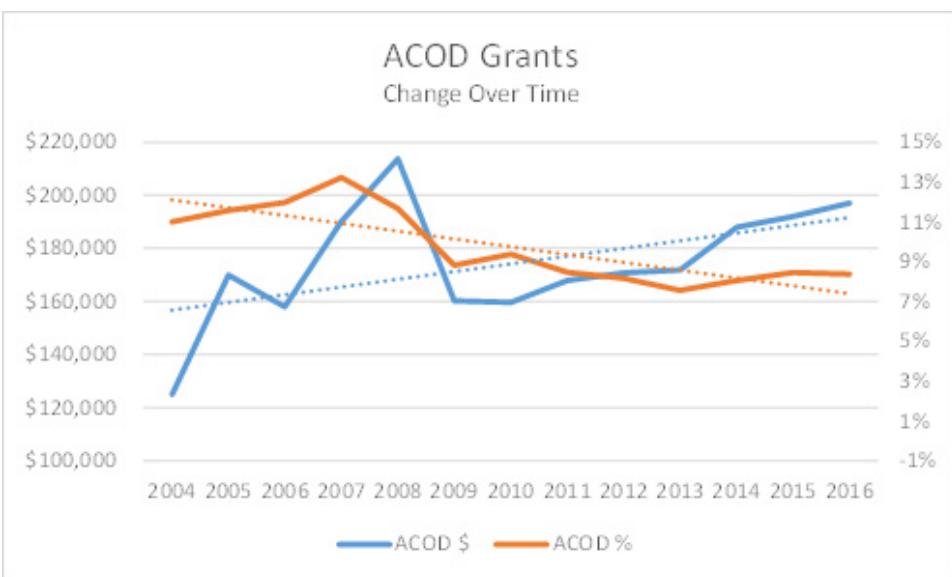


Figure 2-A

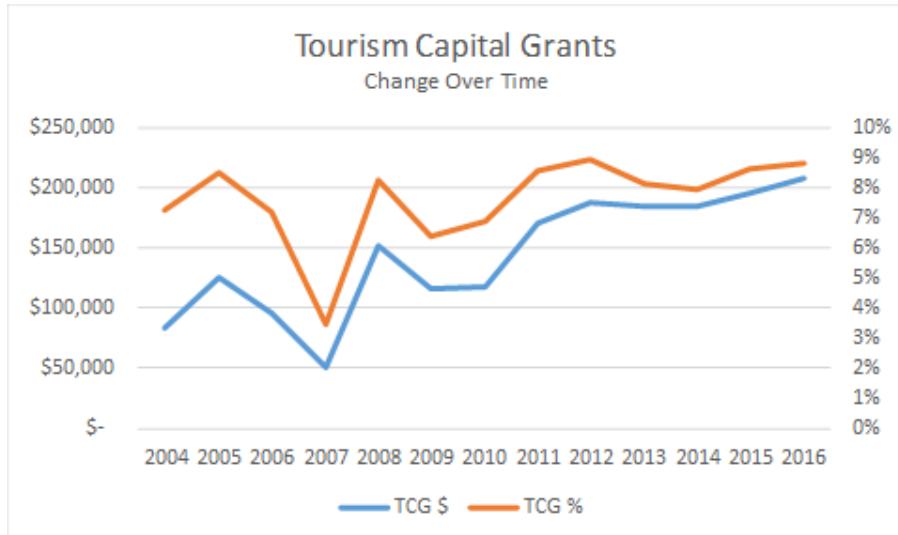


Figure 2-B

98 **Tourism Project Grants** were distributed, totaling \$763,552, or 3.2% of the total. Only a few grants were allocated in the first years of the study, but beginning in 2007 the number of grants distributed was relatively consistent at 7-11 awards per year. Average award amounts were also consistent, generally hovering around \$8,000. The smallest awards were for \$1,000 (for the 2007 Grapethound Wine Tour and the 2008 National Dance Week), and the largest for \$23,000 (for the 2016 Sciencenter Make Some Noise event)

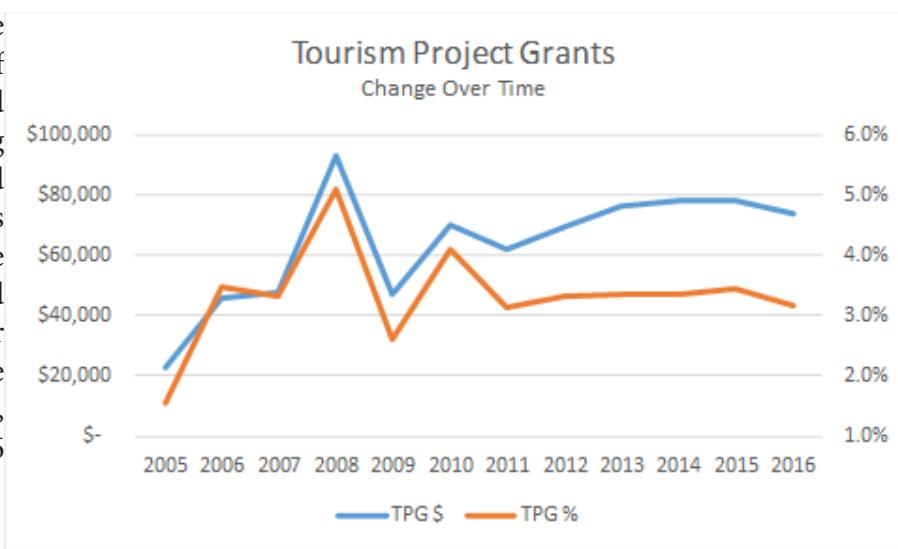


Figure 2-C



Figure 2-D were for far larger amounts. The average of the 2005-2010 NTI grants was \$17,767, and the average for the more recent grants was \$7,730. The smallest award was for \$1,000 for the 2015 “Exploring Edu-tourism on Cayuga Lake”, and the largest were awards of \$25,000 (2008), \$25,000 (2009) and \$24,000 (2011) to the Finger Lakes Wine Center.

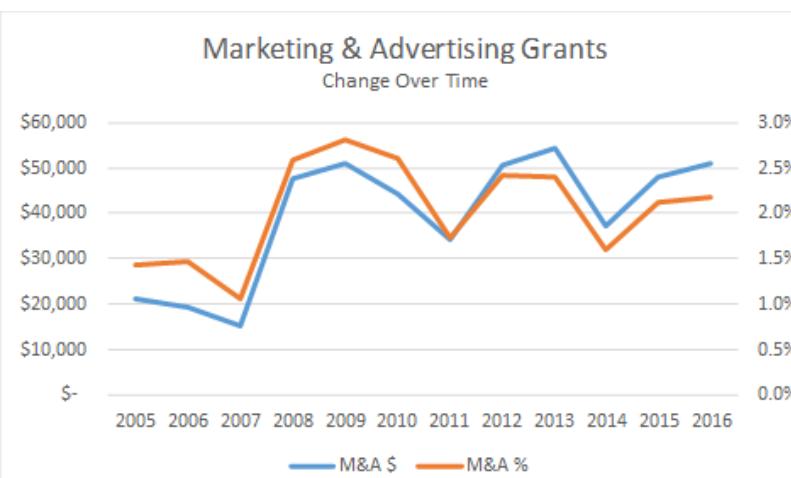


Figure 2-E

The number of **New Tourism Initiative Grants** varied considerably year-to-year, based on demand. Total annual awards ranged from zero in 2006 and 2010 to 11 in 2015. Overall, 66 were distributed during the study period, for a total of \$587,839, 2.4% of total investment. While the annual total fluctuated, it increased markedly beginning in 2011. A total of eight grants, worth \$149,370, were distributed in the six years from 2005 to 2010, and fifty-eight grants, worth \$438,469, were awarded in the six years from 2011-2016. Those few grants that were awarded earlier, however,

**Tourism Marketing & Advertising Grants** were distributed 155 times during the study period, with total investment of \$480,345. That was 2% of total investment. For the first few years only a few grants were issued, but in 2008 the annual number grew to 16, and remained between 11 and 18 through 2016. The overall average grant amount was \$3,099, and there were no true outliers to that figure over the years. The lowest annual average was \$2,590 in 2014, and the highest was \$4,100 in 2005. The smallest individual award was for \$750, for the Historic Ithaca Window Preservation Conference in 2010, and the largest awards were for \$5,000, granted to 35 different marketing endeavors.

**Community Celebrations Grants** were by far the most numerous awards among the grant programs, though they tended to be quite small. 289 grants were awarded during the study period, for a total of \$339,126, or 1.4% of total investment. That is an average of \$1,173 per grant, and that average did not fluctuate much on an annual basis. The lowest averages were just over \$800 for 2004 and 2012, and the highest average was around \$1,440 for

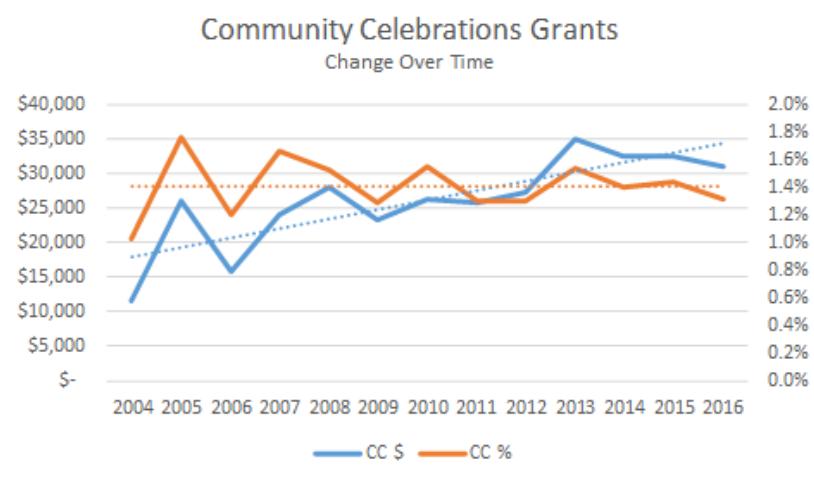


Figure 2-F

2005. The number of grants issued generally increased from 12 in 2004 to 33 in 2013, before leveling out and then dropping to 23 in 2016. The smallest grant was for \$200, for Groton's 2009 Halloween Celebration. The largest grants were for \$2,000, awarded to 31 celebrations throughout the years. As shown by the fit lines in Figure 2-F, the total allocated each year increased threefold over the study period, while the grants' share of the total has remained constant.

The TCTP first offered **Strategic Tourism Implementation Grants** in 2013, when three grants, totaling \$135,940, were awarded to support critical actions identified in the 2020 Strategic Tourism Plan. Only one further grant was awarded in the remainder of the study period—a \$50,000 grant to fund the Visitor Profile Study that is to begin in 2017. The total of \$185,940 is 0.7% of total investment, and 2% of investment during its active years, 2013-2016.

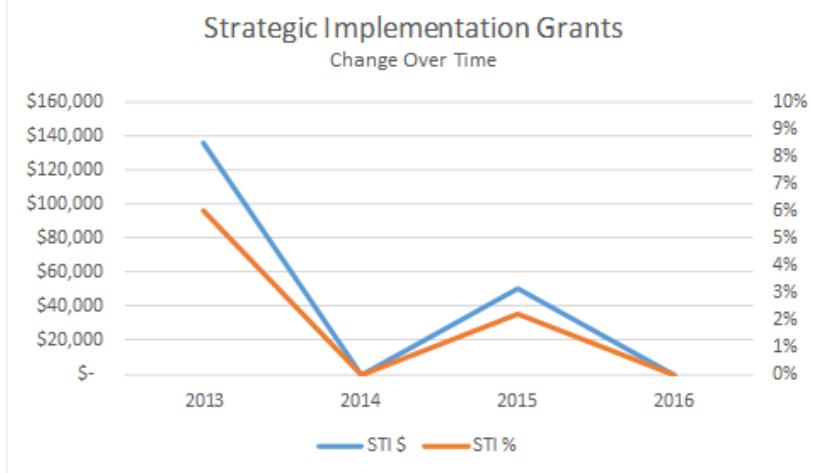


Figure 2-G

While the Tompkins County Tourism Program administers most of the grants internally, Tourism Program partner organizations manage the two largest—Arts & Cultural Organizational Development and Tourism Capital Grants. The Community Arts Partnership (CAP) manages ACOD grants, and Tompkins County Area Development (TCAD) manages TCG. Both organizations have received grant administration fees throughout the study period.

**Administrative fees to the Community Arts Partnership**, including the cost of ACOD's "Rent a CFO" service, totaled \$229,988, or 1.0% of total room tax investment. The fee amount rose steadily between 2004 and 2012, before decreasing by more than half in 2013. The last three years show a slow and steady increase in funding.

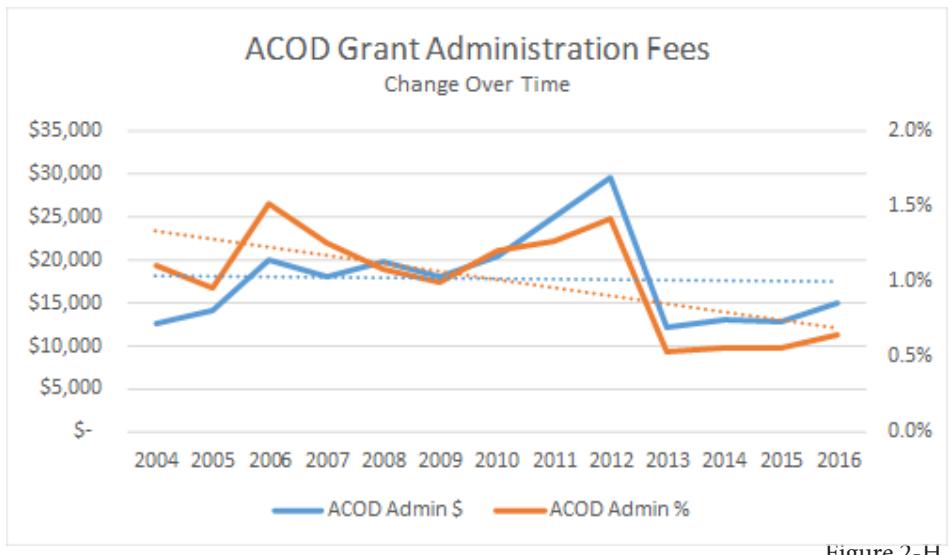


Figure 2-H

**Fees to Tompkins County Area Development** for Tourism Capital Grant administration totaled \$160,148 (0.7%). They fluctuated throughout the study period, but were far more consistent beginning in 2013. The fee amount each year does not correspond to either the amount budgeted to TCG or the amount distributed to grantees, but rather to work performed.

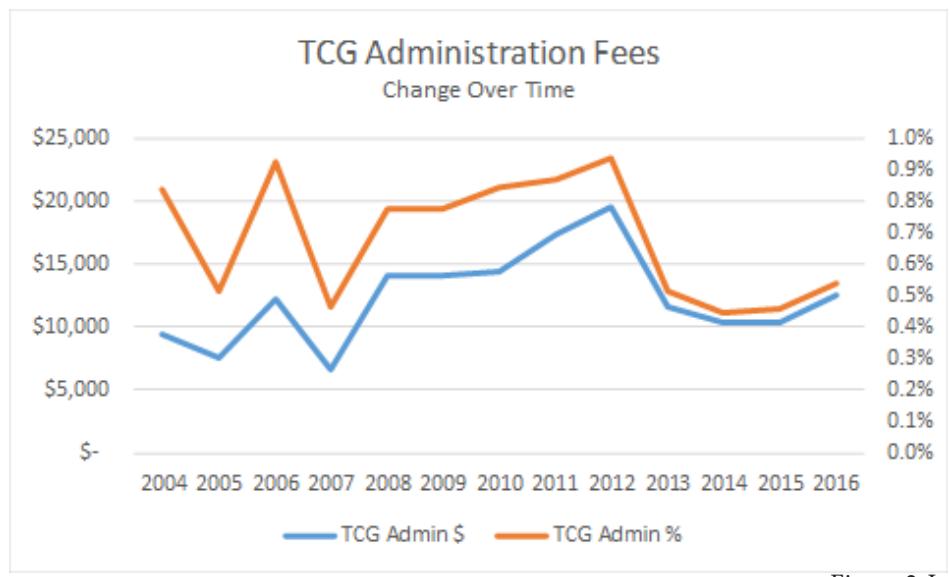


Figure 2-I

## Part Two: Programs

The non-grant portion of the Tourism Program, collectively referred to here as the “programs”, consists of 11 different line items. That number grew over the study period, from 5 in 2004. Each of those programs is considered below, in order of their total budget share.

By far the largest of the programs is the **Convention and Visitors Bureau (CVB)** budget. In 2004 the CVB received an allocation of \$590,000, 52% of the \$1.3 million TCTP budget. In 2005 it increased significantly, to \$755,600, on pace with the increasing overall budget. The CVB share of funds remained steady until 2008, when it decreased to 44%, corresponding with the previously-discussed increase in grant funding. It generally stayed between 41% and 46% for the remainder of the study period, while peaking in total dollars at \$957,500 in 2014. Over the whole period, the CVB received \$10,799,585, or 44.8% of total investment.

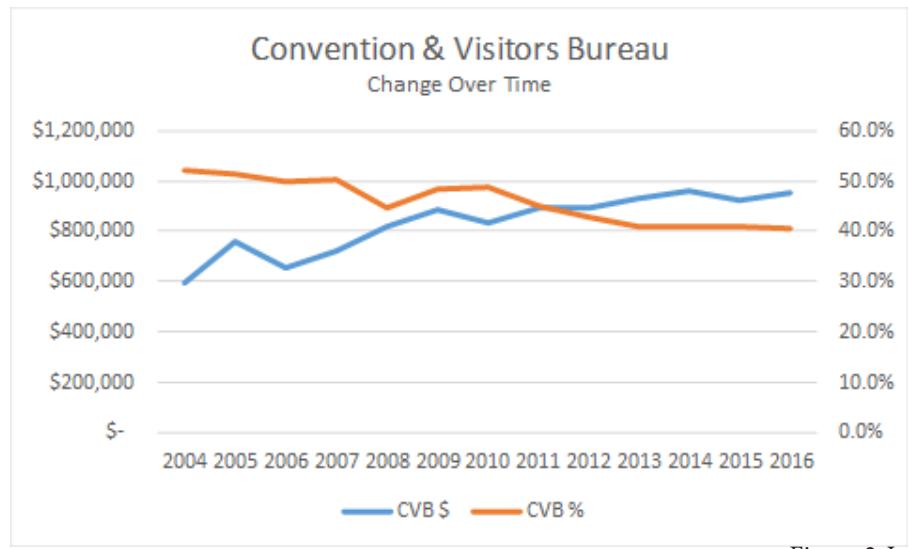
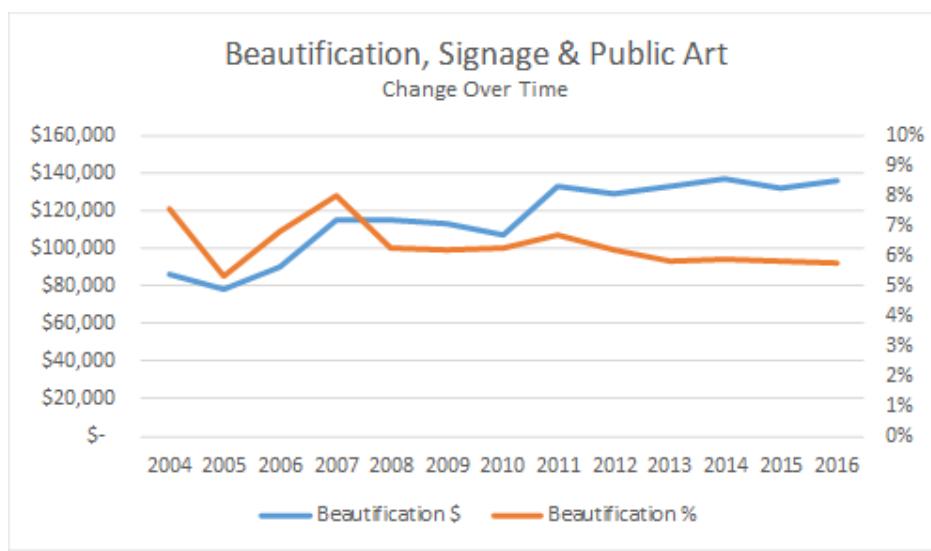


Figure 2-J



The long-running **Beautification, Public Art & Signage** program, administered by the Chamber of Commerce, received allocations totaling \$1,502,691 during the study period, or 6.3% of total investment. Like the CVB and other consistently funded investments, Beautification, Public Art & Signage saw its total budget share decrease slightly even as its funding in real dollars rose.

Figure 2-K

**Strategic Planning & Staffing** received a total allocation of \$469,520, or 2.0% of the total. This program was initiated in 2008 with a budget of \$16,000. It fell to \$0 in 2010, rose to \$43,392 in 2011, then rose substantially again in 2012 (the first year of full-time staff support for the Tourism Program), settling around \$78,000 from 2012-2016.



Figure 2-O

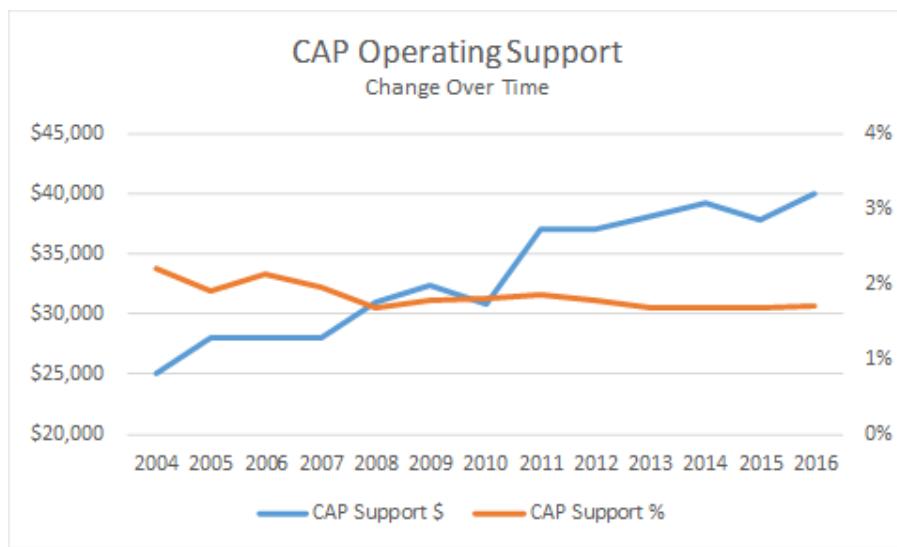


Figure 2-L

Support for the **Discovery Trail** marketing initiative throughout the study period totaled \$442,175, or 1.8% of total investment. The annual amount increased, but the percentage dropped slightly over the years. From 2012 to 2016, it stayed around 1.6%.

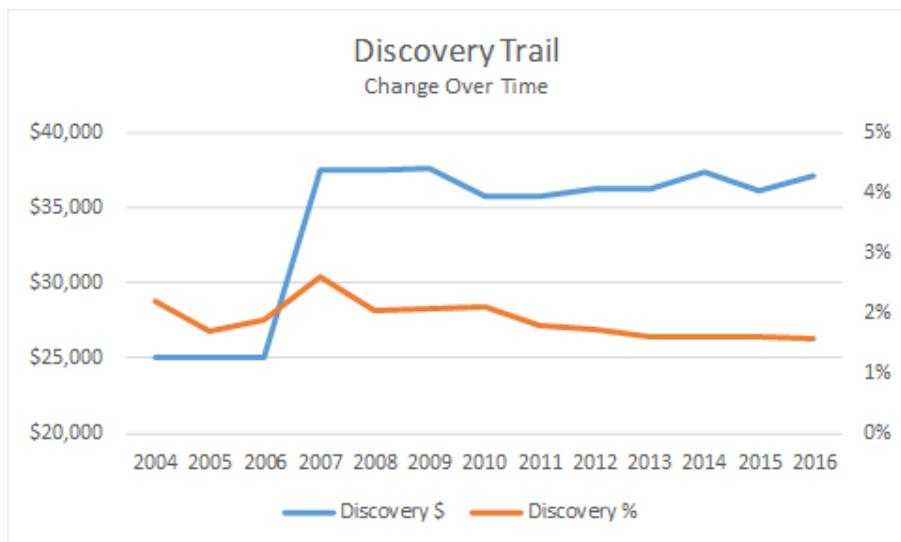


Figure 2-M

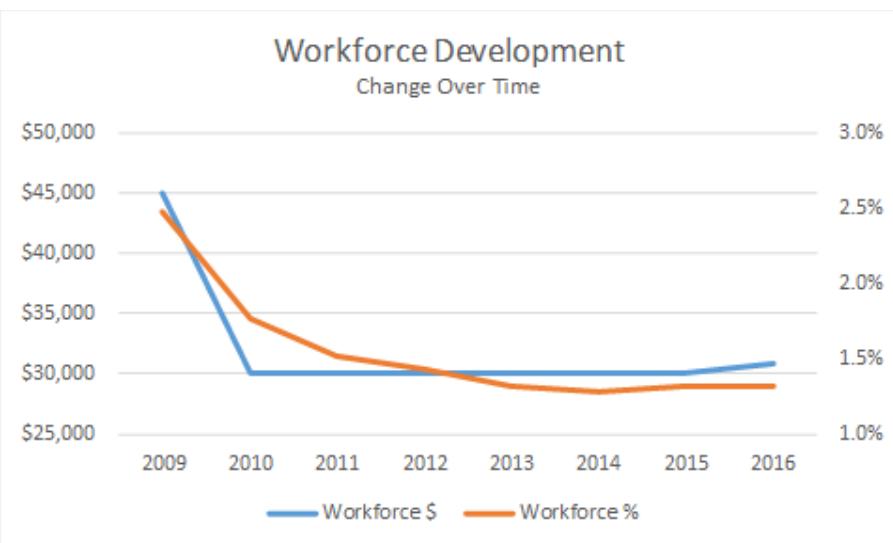


Figure 2-N

Funding of the Community Arts Partnership-administered **Ticket Center** project lasted from the beginning of the study period until 2013, when it was shut down. It accounted for \$252,840 in total spending, which is 1.5% of the budget for the years in which the Center was operational, and 1.1% of total study period investments. Total allocation was highest at the beginning, in 2004 and 2005, then declined to around \$22,000 annually.

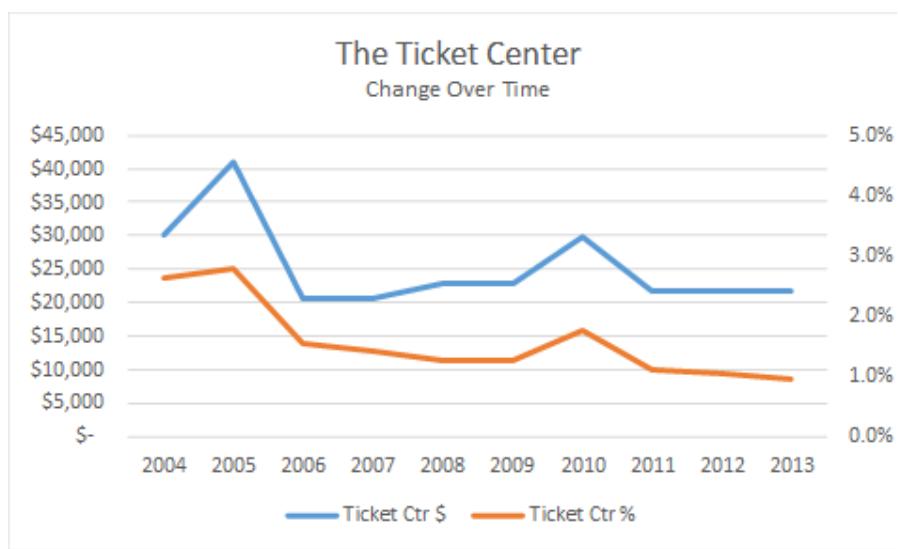


Figure 2-P

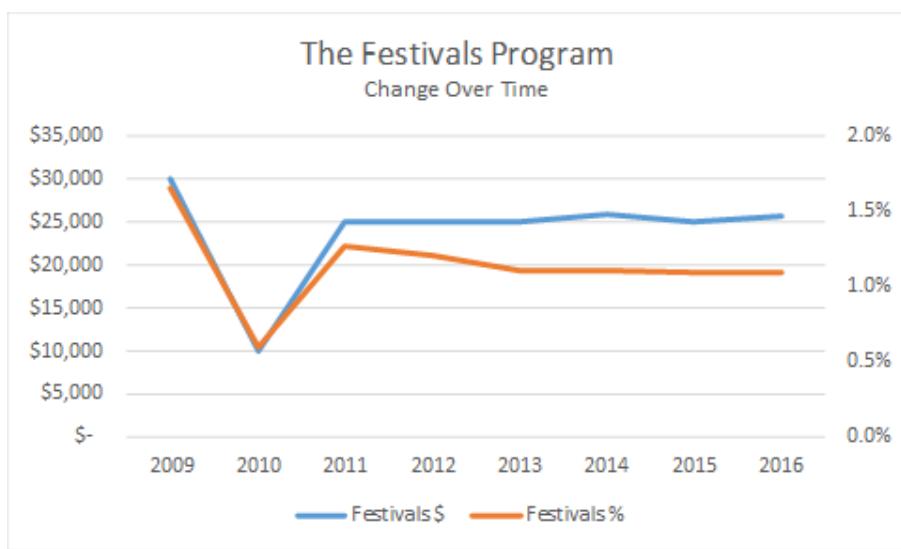


Figure 2-Q

The **Workforce Development** program, administered by the Tompkins County Workforce Investment Board, was inaugurated in 2009 with an initial investment of \$45,000, which was 2.5% of that year's budget. The amount decreased significantly the next year, to \$30,000, and remained at that level until 2016, when it increased slightly to \$30,900. Overall, the program received \$255,900 in funds, or 1.1% of total spending.

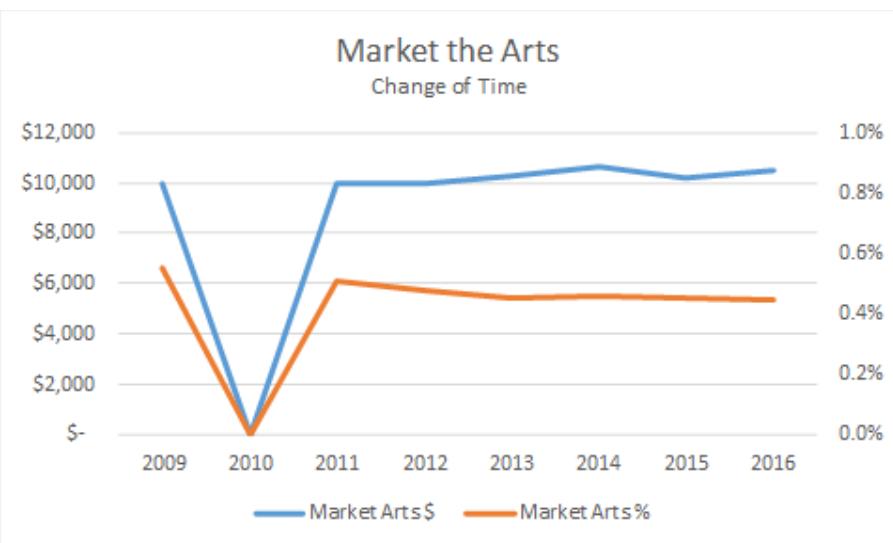


Figure 2-R

The **County Historian** began to be funded in 2008, at \$5,000 per year. That figure was increased twice, to \$5,500 in 2013 and \$7,500 in 2015. In the last two years it represented a little more than 0.3% of investment, and overall it accounted for 0.2% of spending.

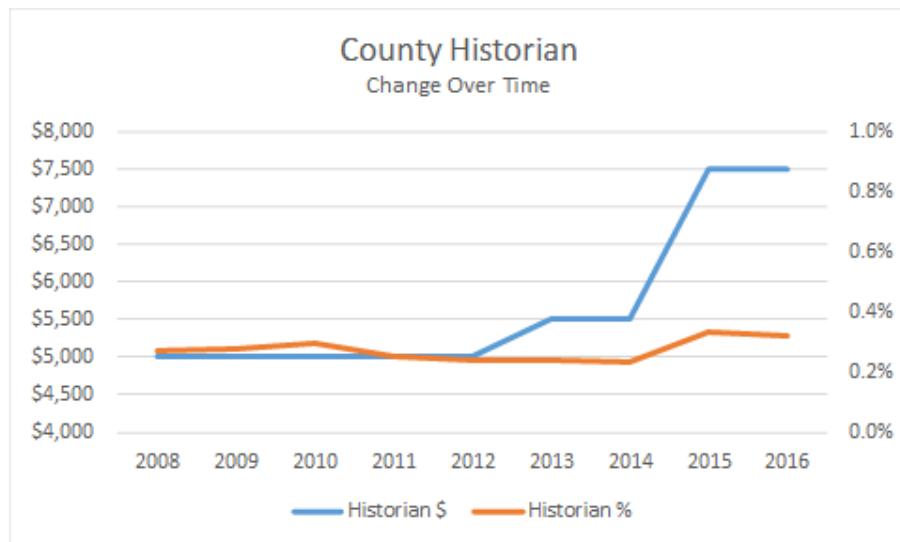


Figure 2-S



Figure 2-T

**Market the Arts** was also added to the list of programs in 2009, to be administered by CAP. With the exception of 2010, it was consistently funded at around \$10,000 annually, for a total of \$71,600, or 0.3% of total investment.

## Part Three: Administrative Functions & TCAD Support

Each year, 10% of room tax revenue was allocated to Tompkins County for **program administration**. The amount, of course, increased with the room tax budget, from \$114,000 in 2004 to \$248,667 in 2016. During the study period, \$2,328,648 was allocated for county expenses, which is actually only 9.7% of the total. The reason for the slight discrepancy is that the spreadsheet for this report is organized according to distribution of room tax funds, not intake of room tax revenues, as detailed in the Methodology section.

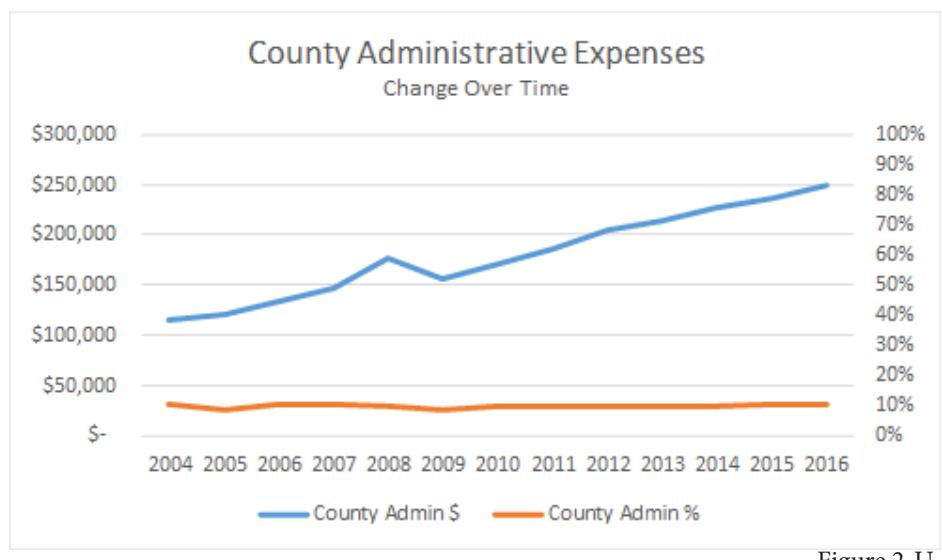
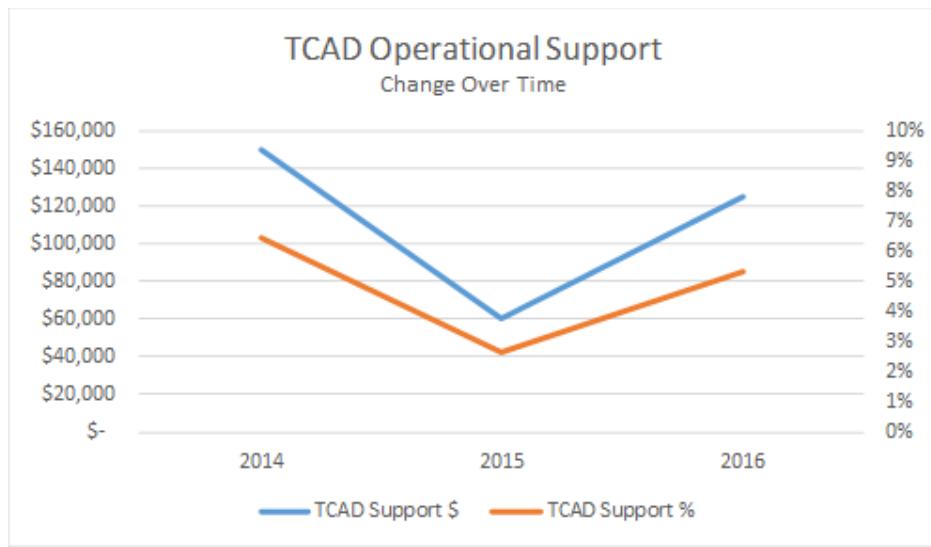


Figure 2-U



**Tompkins County Area Development** began to receive operational support from room tax funds in 2014. That support fluctuated year-to-year, from \$150,000 in 2014 to \$60,000 in 2015, and back up to \$125,000 in 2016, for a total of \$335,000 (1.4% of the study period total, and an average of 4.8% for the three years it was active).

Figure 2-V

### 3. Grant Recipients & Grant-Funded Projects

This section will break down grant allocation during the study period. It will explore the investment level in individual organizations, patterns among grantees, and how recipients have changed over time. It will also analyze grant investments from an events and projects angle, discussing several of the larger events and projects to which the TCTP has committed grant funds.

As noted earlier, Community Celebrations Grants are often not tourism-oriented, so this section considers only the other six grant types —ACOD, TCG, TPG, TMA, NTI, and STI.

#### Key Themes:

1. Of 70 different grant recipients, 56 received fewer than ten grants during the study period.
2. A small, core group of institutions received a substantial portion of grant funding, but funding to those organizations plateaued in latter years of the study period, while small grants to a wider variety of recipients increased.
3. 101 different events were supported by 267 grants during the study period.
4. The nine largest grant-funded capital projects accounted for about \$998,400, 15% of total grant investment.
5. 13% of grant funding went to projects and institutions that no longer exist. The majority of this went to two projects: the Finger Lakes Wine Center and the Light in Winter Festival. 30% of grant funding went to projects that are still extant, but no longer seek TCTP funding. The vast majority of this was Tourism Capital Grants support for anchor recipient projects.

#### *Part One: Recipients*

Between 2004 and 2016, the Tompkins County Tourism Program awarded a total of 512 grants among these six grant types. The annual number has been as low as 12, in 2004, and as high as 60, in 2013 and 2016.

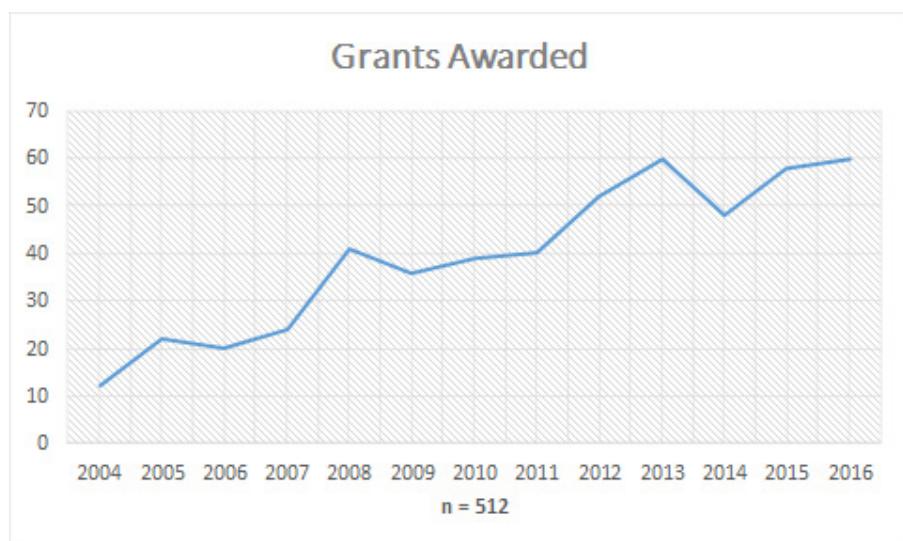


Figure 3-A

As the number of grants awarded increased, so too did the number of unique recipients. There were 71 different grant recipients during the study period. 56 received fewer than 10 grants, of which 19 received only one. Because of years in which multiple grants were awarded to the same recipients, the increase in grants awarded does not always match Figure 3-B, which depicts the number of unique recipients in a given year.

### Annual # of Unique Grant Recipients



Figure 3-B

### First Time Grant Recipients By Year

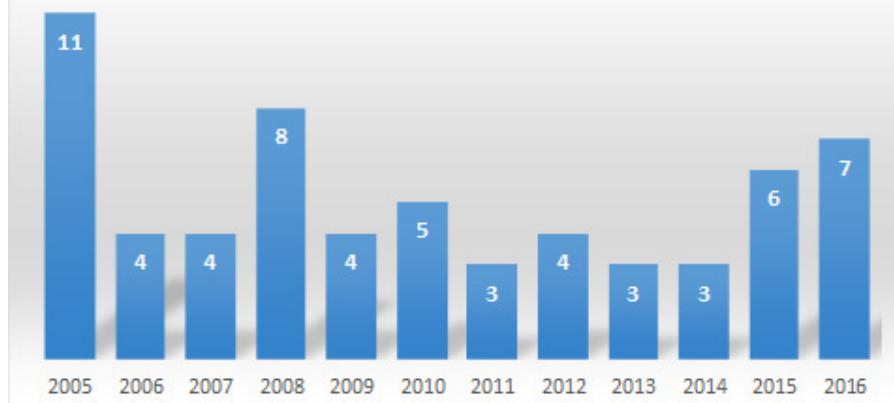


Figure 3-C Note that the chart shows the first appearance of the grantee during the study period, not the entirety of TCTP history. It begins in 2005, since all recipients were “new” in 2004.

The recipient of the most grants during the study period was PRI/Museum of the Earth, with 52, though it is important to note that that number includes grants awarded after PRI merged with Cayuga Nature Center. All grantees with 20 or more awards are listed in Table 3-A.

The Program also saw fluctuations in the number of first-time grantees. At times, an increase in new grantees coincides with an expansion of the grant program, as in 2005 or 2008. At other times, as in 2013, there is no correlation (again, the result of multiple grants being issued to established recipients).

Grantee	Number of Grants, 2004-2016
PRI/Museum of the Earth (Including CNC Merger)	52
Downtown Ithaca Alliance	36
The State Theatre	30
Hangar Theatre	28
The Sciencenter	27
The History Center	27
Cayuga Nature Center (Pre-Merger)	21
Kitchen Theatre	21

The grant recipient having received the most grant funds, PRI/Museum of the Earth, accounts for \$718,436 in total distribution, which is over 10% of total grant spending, and 3% of total room tax investment. All grantees with total investment over \$200,000 are shown in the table below, and a complete table of all grantees can be found in the appendix.

Grantee	Total Awarded	% of Grant Spending	% of Total Investment
PRI/Museum of the Earth (Including CNC Merger)	\$718,436	10.4%	3.0%
Hangar Theatre	\$566,115	8.2%	2.4%
The State Theatre	\$512,824	7.5%	2.1%
Kitchen Theatre	\$490,856	7.1%	2.0%
The Sciencenter	\$457,793	6.7%	1.9%
The History Center	\$411,004	6.0%	1.7%
Cayuga Nature Center (Pre-Merger)	\$354,512	5.2%	1.5%
Finger Lakes Wine Center	\$295,870	4.3%	1.2%
Cayuga Chamber Orchestra	\$295,384	4.3%	1.2%
Downtown Ithaca Alliance	\$289,843	4.2%	1.2%

Table 3-B

Many of the above grantees can be thought of as “anchor” recipients: institutions with an established presence in the community and a longstanding relationship with the TCTP. They represent the Program’s desire to reinforce and support the county’s tourism backbone. The exception on the list is the Finger Lakes Wine Center, which folded in 2012 after less than two years in operation.

Figures 3-D and 3-E portray the relationship between the other 9 recipients above (all except the Wine Center) and all other grantees, to help illustrate the changing balance of Program investments.

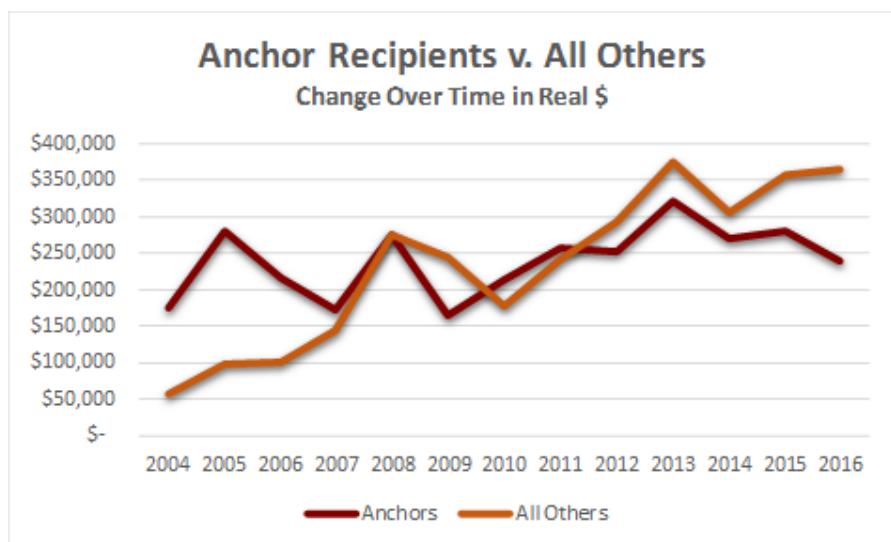


Figure 3-D

The shift in the pattern, especially over the last three years, is evident in this graph: investment in anchor institutions has plateaued and even fallen from a 2013 peak, and been replaced by small grants to a wider variety of recipients. This is confirmed both by the earlier graph of total unique recipients by year and by the next chart, which shows the number of grants to anchors and all others.

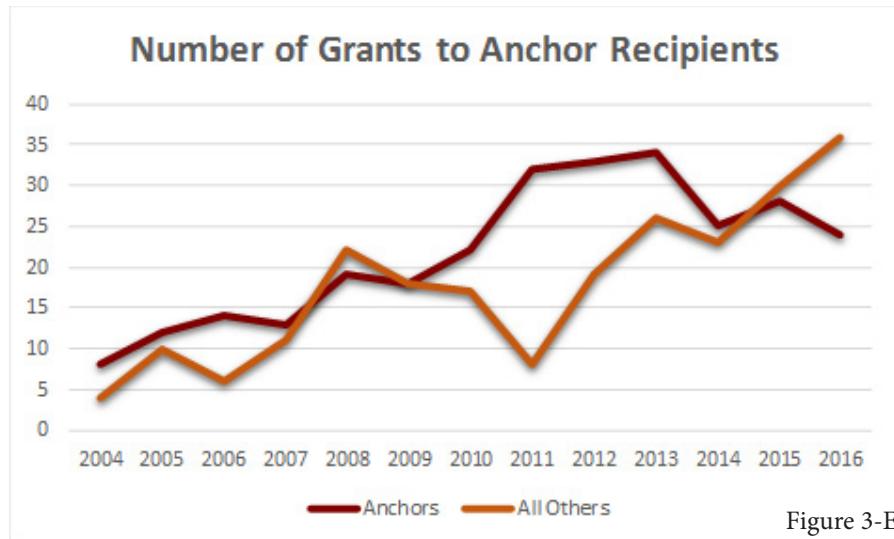


Figure 3-E

## Part Two: Projects

In addition to analyzing grants by recipient, it is important to consider overall investment in particular projects. Often, investment in a project will occur over a number of different grants and over multiple years. Investment in a project may also involve grants to multiple recipients. Part Two will briefly discuss two kinds of project - events/exhibits and capital projects - before closing with an analysis of the current status of projects funded during the study period.

### Events

There were 267 event- or exhibit-oriented grants between 2004-2016 (again, not including the 289 Community Celebrations Grants). Those grants supported 101 different types of festivals, events and exhibits. As might be expected, over time the number of events supported annually has increased with the overall budget.

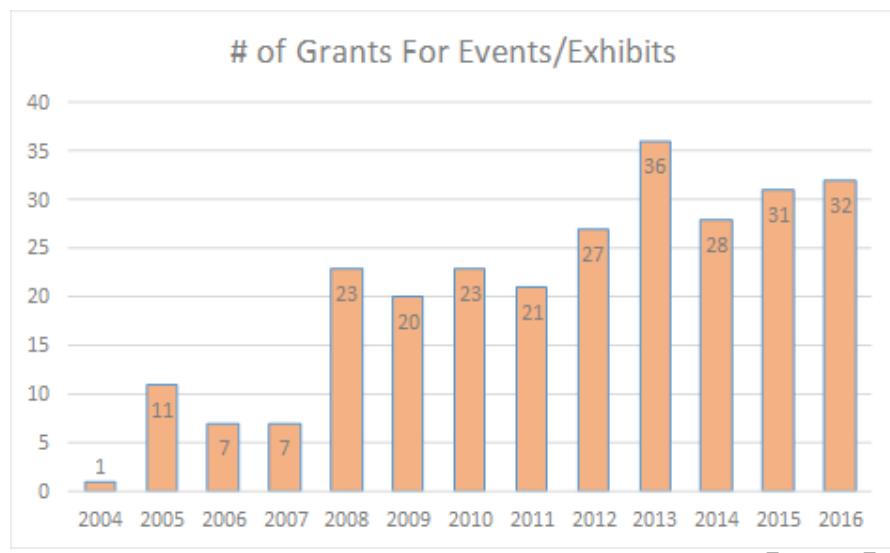


Figure 3-F

While many of these investments were designed to be singular events, others have had a longer relationship with the TCTP. The chart below outlines the investments TCTP made in the top ten highest-funded events. A full chart of investments in all 101 events and exhibits is in the appendix.

<b>Use/Project</b>	<b>Total Invested</b>	<b>Number of Grants</b>
Downtown Ithaca Winter Festival	\$143,093	19
Dragon Boat Festival	\$105,317	11
Light in Winter Festival	\$83,238	8
Fantastik Film Festival	\$82,225	10
Scottish Games & Celtic Festival	\$69,675	13
Winter Village Bluegrass	\$68,250	8
Summer Shakespeare Festival	\$61,500	8
Restaurant Week/Bite of Ithaca	\$46,500	10
Spring Writes	\$40,468	13
Ithaca Skate Jam	\$35,800	6

Table 3-C

## Major Capital Projects

Several major tourism-oriented capital initiatives were also undertaken during the study period, both for individual institutions and general infrastructure. The nine largest of these are listed in the table below. These nine projects, all funded by Tourism Capital Grants, make up 15% of total grants distribution (\$998,417) during the study period.

<b>Use/Project</b>	<b>Total Invested</b>	<b>Number of Grants</b>
Cayuga Nature Center Renovations	\$242,137	7
Wine Center Opening Capital	\$172,500	3
Kitchen Theatre Move	\$134,000	3
State Theatre Improvements	\$129,780	5
Museum of the Earth Expansion	\$100,000	1
Community School of Music and Art Third Floor Renovations	\$63,000	3
Sciencenter Outdoor Upgrades	\$60,000	1
Stewart Park Improvements	\$60,000	4
The Waterfront Trail	\$37,000	5

Note: totals only include money distributed during the study period, which includes portions of grants issued earlier. Table 3-D

## Project Closures & Completions

The TCTP values financial stability in its investments, balancing a desire to be entrepreneurial with an insistence on financial planning by grant recipients. The Program monitors the status of grant recipients and encourages them to seek financial independence when possible. The majority of TCTP grant investment went to a project or institution for which more funding is likely to be allocated in the future, but about 40% of grant funds went to a project or institution that is not expected to request funding from the TCTP in the future, either because they no longer operate or because they no longer have the need. The final portion of this section first considers all grant investments that were made in projects and institutions that are no longer active, and breaks down the types of grant investments that have gone to these no longer extant initiatives. It then examines the other end of this spectrum: grants made to an initiative that is still active, but is not currently seeking TCTP funding.

As before, this considers grant investments only. With the notable exception of Ticket Center Ithaca, all non-grant programs continue to exist and to be funded by the Tompkins County Tourism Program. Analyzing the results of investments made by non-grant programs is beyond the scope of this report.

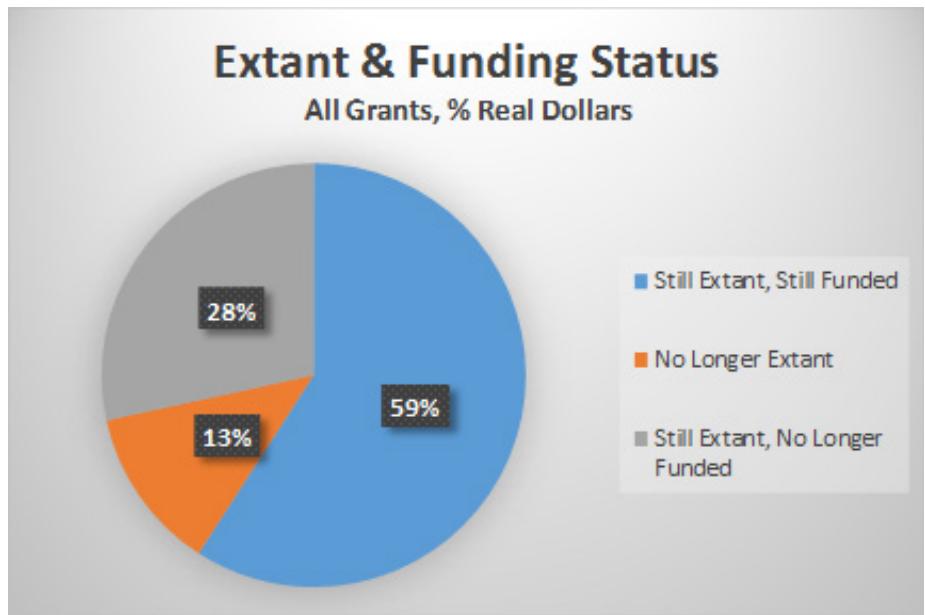


Figure 3-G

### A: Continuance of Grant-Funded Projects & Institutions

Of the 512 grants issued during the study period (as before, not considering Community Celebration grants), 412 went to projects and institutions that are still in operation as of early 2017. Of the remaining 100, two are for ongoing projects (the Conferencing/Meeting Facility Feasibility Study and the Visitor Profile Study), and the remaining 98 are for projects that are no longer in existence.

63 of these 98 grants (worth \$355,785) were designed to be temporary; they were for a unique event or exhibit, and were not intended to be a lasting investment. 14 (worth \$45,600) were small grants intended to explore a new idea or enhance tourism infrastructure. These include feasibility studies and general marketing efforts, among other ventures. The remaining 21 (worth \$351,236) are institutional, supporting the development of an institution that has since shut its doors or an institution-specific marketing campaign that has not been sustained. Overall, \$755,000 (13% of grant spending) went to the 98 grants.

While the nature of the grants thus varies, the key takeaway from this analysis comes from the recipients. The grants can be divided into three recipient categories.

- 1.** Large investment in two discontinued projects: combined, the Finger Lakes Wine Center and the Light in Winter Festival accounted for \$423,108, or 56% of the above total. The 25 grants (New Tourism Initiative, Tourism Capital Grants, Tourism Project Grants, and Tourism Marketing & Advertising) allocated to these two projects were often for large amounts, at an average of \$16,924. The weight of these two projects is even greater when considering only those grants linked to infrastructural or institutional initiatives. Among those, they account for fully 84% of money allocated.
- 2.** Temporary exhibits and unsustained initiatives with established partners: 39 of the remaining 73 grants, worth \$195,240, went to institutions listed earlier in this report as Anchor Recipients. 80% of that total was linked to an event or exhibit hosted by that institution.
- 3.** Small grants to peripheral partners: the remaining 33 grants were distributed to 24 different recipients, and the average grant was for \$4,069. The total of these 33 grants, \$134,273, is 18% of the total \$755,000. Only 9 of them, worth \$23,350, were not linked to an event or exhibit.

## B: Operational Investments that No Longer Require Funding

144 grants went to projects and events that are still extant, but are not seeking TCTP funding in 2017\*. These grants total \$1,721,973, 28% of the total grant funds issued. Generally, these investments fall into one of three categories.

- 1.** Tourism Capital Grants to anchor recipients: the vast majority is in this category. Fully 76% of the total listed above comes from Tourism Capital Grants—71 of them, worth \$1.3 million. 85% of this TCG allocation went to an anchor recipient. This includes funding for renovation of the Cayuga Nature Center, the Kitchen Theatre's relocation, and the State Theatre's bathroom expansion, among many others.
- 2.** Successful Events: nearly half of these grants, totaling 23% of the total above, were for an event or exhibit that continues to run, but that no longer seeks funding. A few of these stand out in particular.
  - a.** A number of athletic events have thrived in Tompkins County in recent years. These include the Cayuga Lake Triathlon, funded from 2009 to 2013, and the Cayuga Trails 50, funded from 2012-2013, both of which continue to grow with the help of membership/entrance fees and sponsorships.
  - b.** A few of the county's notable music festivals also no longer seek TCTP funding. This includes the Finger Lakes Grassroots Festival, which received grants in 2005 and 2008, and the Winter Village Bluegrass Festival, which received funds from 2011-2015, but will put on its festivities in March 2017 without TCTP aid.
- 3.** Completed Infrastructure Projects: over \$250,000 worth of grant funds that went to extant, no longer funded projects were for tourism infrastructure improvements that have been completed. These include the Commons Information Kiosks, the Cayuga Waterfront Trail, and the Ithaca Skate Park renovation, among others.

\*Recipients listed in this section may, of course, may come forward with another project or phase of a project in the future.

## 4. Types of Investment

In this section, both grant and non-grant program investments are broken down according to four different classifications: (1) whether they were “Marketing” or “Product” investments; (2) whether they were for a short term “Event/Exhibit”-style project or a longer term “Infrastructure” or “Institutional” goal; (3) whether they were geared towards a specific season; and (4) into what Tourism Strategic Plan Focus Area they fell. At the end of the section a specific investment type, the feasibility study, is considered.

### Key Themes:

1. The 60/40 split between Marketing and Product Development was consistently met, especially over the last 6 years of the study period.
2. Grant investment in short-term projects (events and exhibits) increased as a percentage of total spending, from an average of 17% in 2004-2009 to an average of 31% in 2010-2016.
3. The vast majority of grants were multi-season or year-round grants. Among season-specific grants, Shoulder Season investment increased, while peak season and Winter grants decreased.
4. Among Established and Emerging Tourism Types (as defined in the 2020 Strategic Tourism Plan), Arts, Culture & Heritage Tourism saw the most investment, followed by Educational Tourism and Downtown Ithaca. All other tourism types saw substantially less investment.

### *Part One: Marketing and Product Development*

Every element of the Tompkins County Tourism Program is categorized as either “Marketing” or “Product Development”, with the exception of Strategic Tourism Implementation Grants, the County 10%, and Strategic Planning & Staffing. The stated goal of the Program is to invest 60% of its funds in Marketing and 40% in Product Development, and the annual budget is structured in this manner. Considering that grant allocation tends to shift according to demand, however, is worthwhile to compare budgeted percentages to actual distribution.

Note that because Community Celebrations Grants are considered part of the Product Development portion of the budget, they are included in this section.

#### Marketing:

- CVB
- Marketing & Advertising Grants
- New Tourism Initiative Grants
- Discovery Trail
- Market the Arts
- Tourism Partner Award

#### Product Development:

- Arts & Cultural Development Grants
- Community Celebrations Grants
- Beautification, Signage & Public Art
- Workforce Development
- Community Arts Partnership Operating Assistance
- Festivals Program
- Tourism Project Grants
- County Historian
- Tourism Capital Grants

#### Flex/Administration:

- Strategic Implementation Grants
- Strategic Planning & Staffing
- County 10%

Figure 4-A shows that although there is some slight fluctuation, these percentages indeed remained consistent. Fluctuations in 2008 and 2009 can be traced to both adjustments resulting from the Recession and to the difference in the way Tourism Capital Grants are calculated in the initial budget outlay versus how they are reported in this dataset. Although the CVB makes up the vast majority of Marketing spending, nearly 8% of total distribution (\$1,589,959) went to the other five Marketing programs.

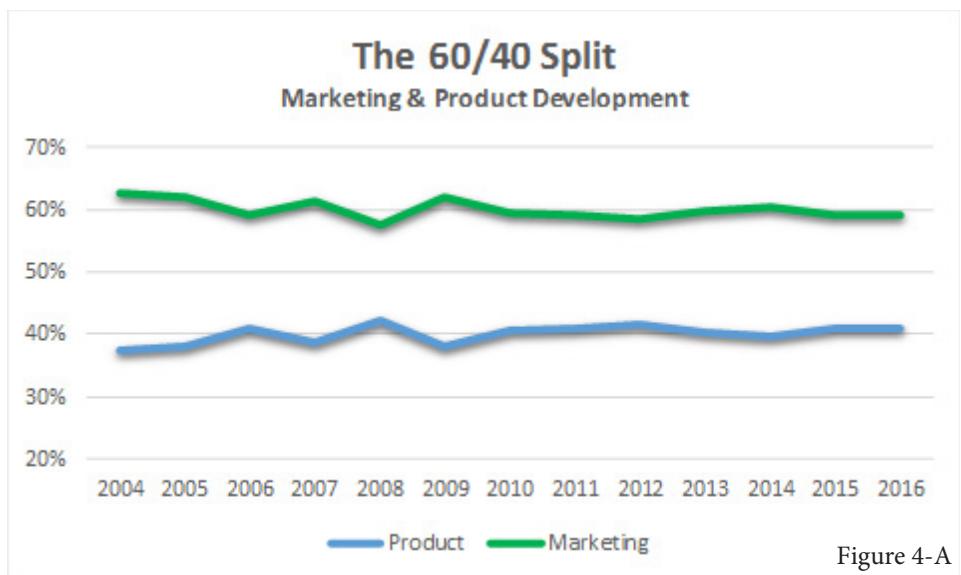


Figure 4-A

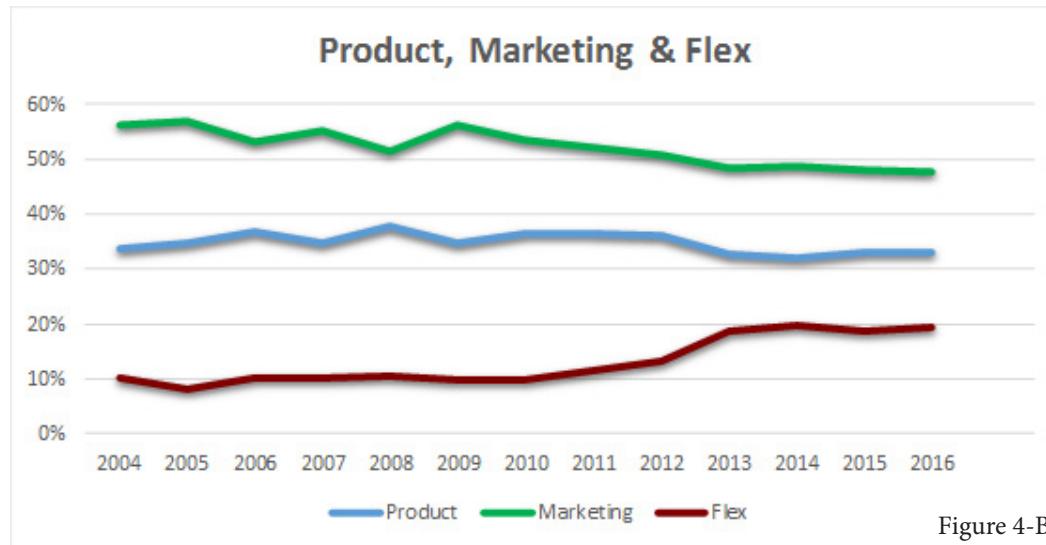


Figure 4-B

With the remainder of the room tax budget included (the County 10%, Strategic Tourism Implementation Grants, Strategic Planning & Staffing, and TCAD Operational Support), the percentages look like those shown in Figure 4-B.

## Part Two: Short Term & Long Term Investments

The TCTP has a legacy of supporting the community events and rotating exhibits that make Ithaca and Tompkins County a vibrant place. At the same time, the Program values long term infrastructural and institutional investments that lay the groundwork for tourism operators to be successful. When the balance between these two goals is considered for the entire Program, the result appears to be a consistent trend: long-term investments make up a little more than 90% of tourism spending. That appearance is heavily influenced by the non-grant programs, all of which fall into the “infrastructure” category. Many of those programs are quite broad, however, and it is not entirely fair to label them as infrastructure. For example, the Market the Arts program is a long term effort, but much of the money that the program spends goes to promote individual events or exhibits.

By removing the programs and considering only grant awards—which can be more accurately categorized—a shift is revealed over the study years. Short term investments rose from 10% to 30% of grant spending between 2004 and 2011, and remained consistently at that level for the rest of the study period.

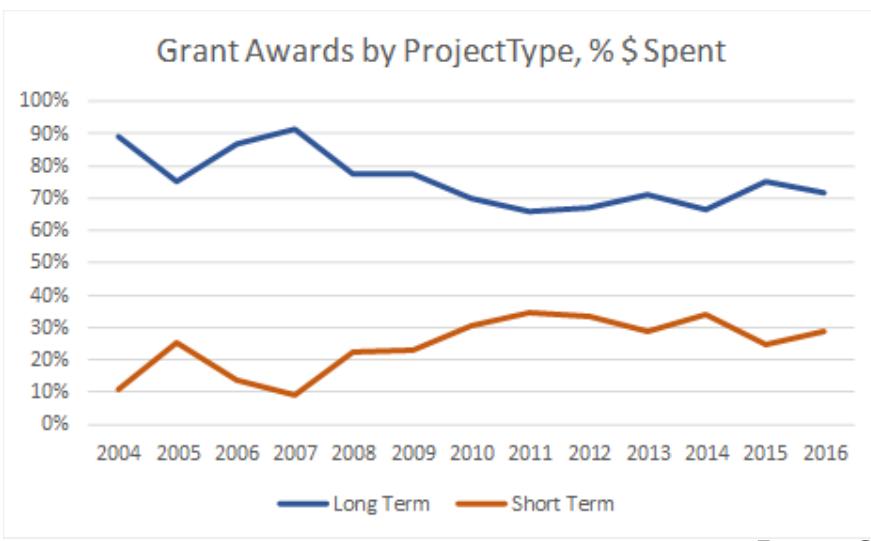


Figure 4-C

The gap between long term and short term investments grew closer for a combination of factors, illustrated in the graphs below. As the first shows, the number of grants for events and exhibits rose in 2008 and stayed roughly even with institutional and infrastructure grants from that point on. At the same time, average grant award amounts stayed very consistent.

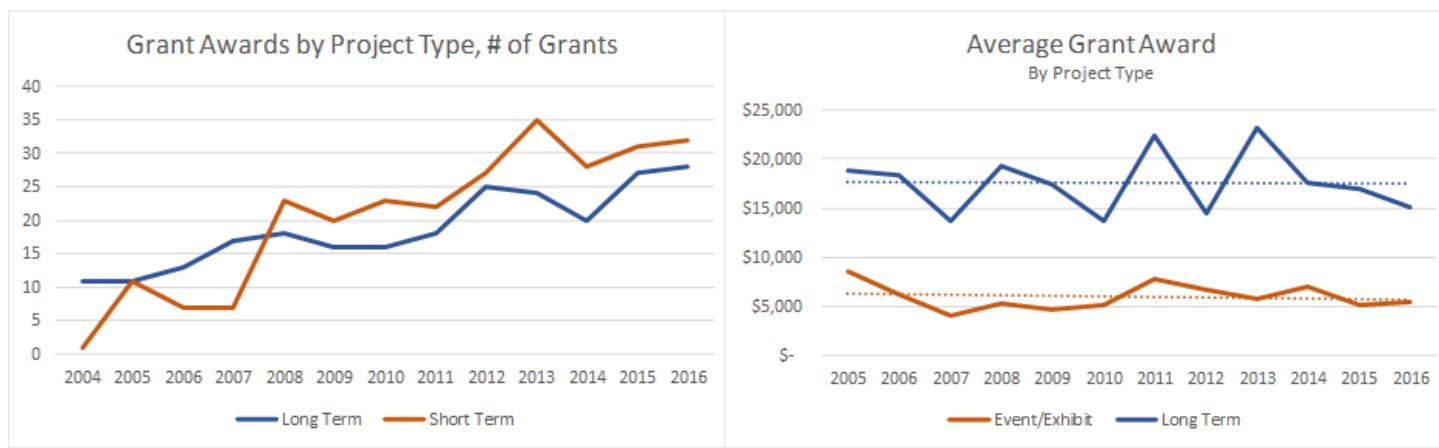


Figure 4-D

### Part Three: Seasonality

Tompkins County has a highly seasonal tourism industry, driven by the wine and waterfalls most accessible in the summer and bookended by May university graduations and the fall colors of late September and October. One of the goals of the Tourism Program is to moderate that yearly cycle by supporting programming and marketing efforts geared towards the shoulder- and off-seasons. Assigning a seasonal focus (or lack thereof) to each grant can provide a sense of seasonal trends over the study period.

While the timing of some of the older events and projects is difficult to determine, 500 of the 512 grants can be reliably classified. Of those, a little more than half (54%) went to projects that had a multi-season or yearlong focus. A few of these—like the Bike Rental program or Farmer’s Market-related grants—are certainly more used during warmer months, but cannot be explicitly linked to one season. Many others, like the ACOD grants, clearly have a yearlong focus. About 17% of grants were directed towards the peak season, while 20% went towards shoulder season (October-November and April-May) projects. Around half as many—a little less than 10%—went to winter projects.

These numbers do not, however, tell the real story. The 54% of grants that are not focused on one season tend to be significantly larger, and actually account for 80% of money spent. As shown in Figure 4-E, the dominance of multi-season investments is such that it is hard to decipher any trends among those grants that are season-specific.

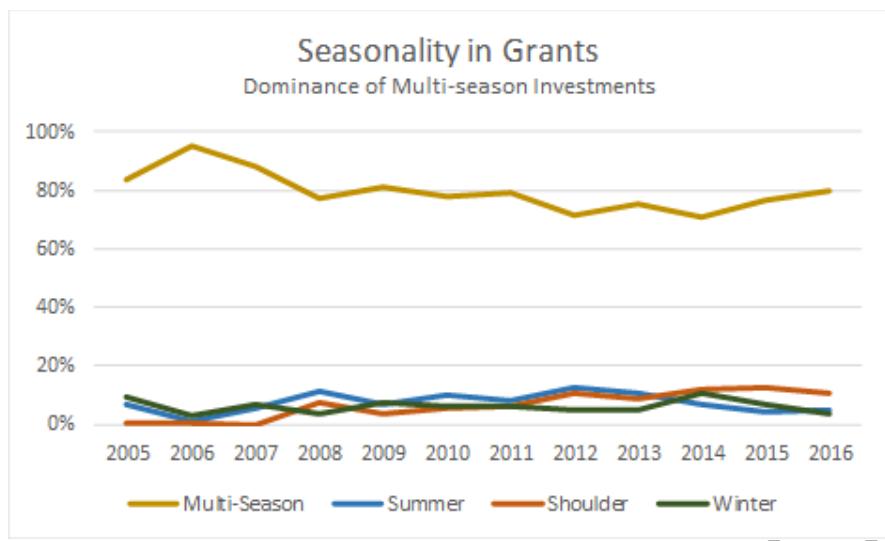


Figure 4-E

If season-specific grants are isolated and compared to each other, however, a small but noticeable trend does emerge. Both Peak and Winter grants have generally declined over the study period, while Shoulder Season grants have increased. This trend holds when Community Celebrations Grants are included, as well.

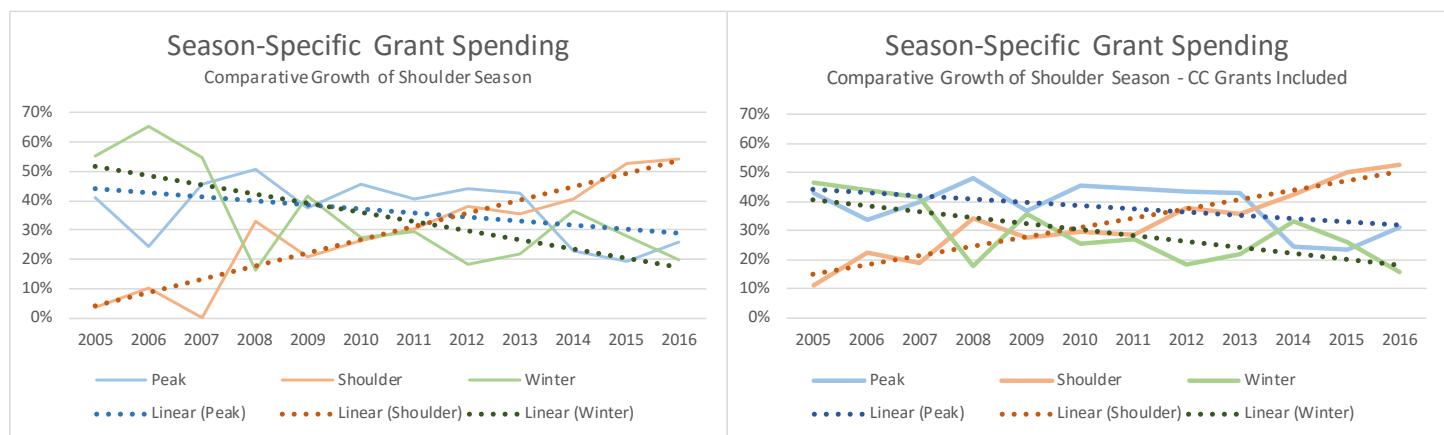


Figure 4-F

Figure 4-G, showing the total number of grants issued per year for each season, reveals a major reason for this trend: strong growth in the number of Shoulder Season grants, while peak season grants have seen inconsistent growth and Winter grants have remained static since 2008.

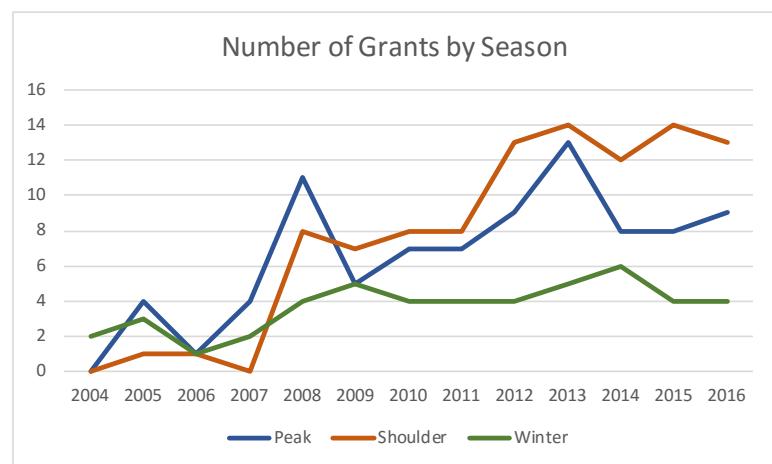


Figure 4-G

## *Part Four: Focus Areas*

The 2020 Tompkins County Strategic Tourism Plan lists 15 Focus Areas that highlight essential tourism elements in Ithaca/Tompkins County. The list is subdivided into three groups: Established Tourism Types, Emerging Tourism Types, and Tourism Foundation.

### Established Tourism Types

- Agricultural & Culinary Tourism
- Arts, Culture, & Heritage Tourism
- Downtown Ithaca
- Educational Tourism
- Lakes, Trails, Parks & Gorges (Outdoor Tourism)

### Emerging Tourism Types

- Sports Tourism
- Sustainability Tourism
- Untapped Niche Markets

### Tourism Foundation

- Beautification, Signage & Public Art
- Festivals
- Groups
- Marketing & Advertising
- Town Gown

#### **Methodological Note:**

The vast majority of Tourism Program investments can be categorized according to these 15 Focus Areas. Those few that cannot include the County 10%, TCG Administrative Fees, Strategic Planning & Staffing, and Tompkins County Area Development (TCAD) Operational Support.

Because Tourism Foundation categories support the thematic Focus Areas, this analysis focuses mainly on Established and Emerging Tourism Types. Tourism Foundation is considered as a whole at the end of the section. For the same reason, the Convention & Visitors Bureau budget is not considered in this section. The CVB takes the lead on many of the “Tourism Foundation” categories, and its efforts support all of the thematic Focus Areas of “Established” and “Emerging” types as well. Finally, as before, Community Celebrations Grants are not included. The remaining pool of investments is \$9,536,480, or about 40% of the entire room tax allocation. All comparative reporting within this section comes from this limited pool: when a Focus Area makes up “8% of investments”, that is 8% of the total after the above restrictions have been made.

Each investment entry was given up to three Focus Areas, ranked in order of their importance. Thus, for example, an investment in the History Center of Tompkins County was first classified as Arts, Culture & Heritage Tourism, second as Educational Tourism, and third as Downtown Ithaca. Below, after some initial figures showing overall investment patterns, each of the thematic Focus Areas is considered individually. The primary Focus Area of an investment is important to consider, but some Focus Areas (Downtown Ithaca, for example), are rarely the primary emphasis, but are regularly a secondary or tertiary emphasis. Thus, both Primary Focus Area data and Total Focus Area data will be presented.

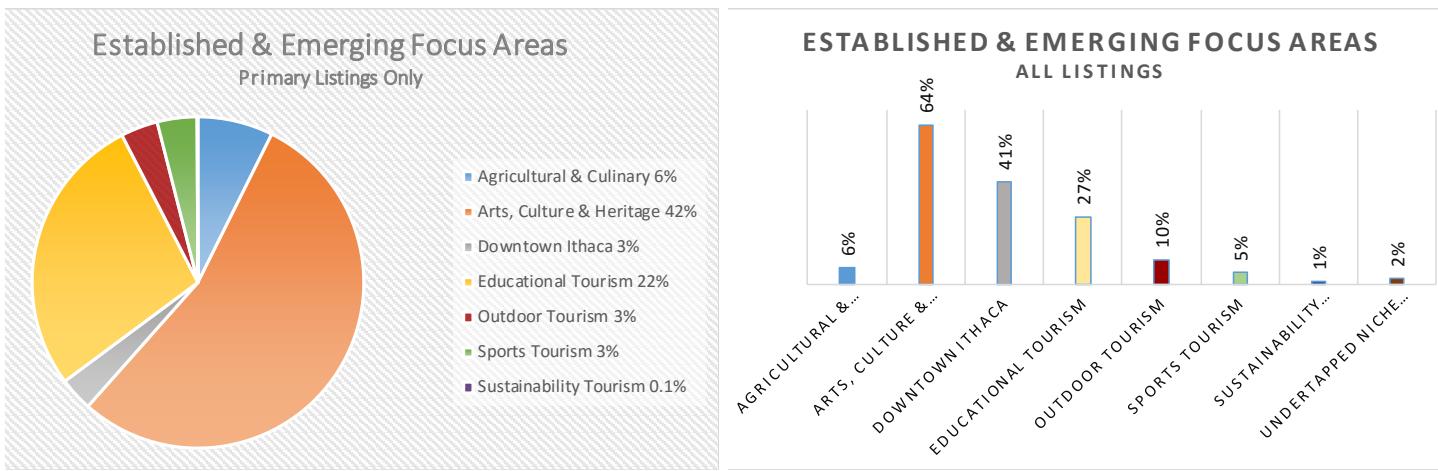


Figure 4-H

## Agricultural & Culinary Tourism

With institutions like the Ithaca Farmers Market and the importance of the wine industry to the Finger Lakes region, Agricultural and Culinary Tourism has long been a staple of Tompkins County. It is perhaps surprising, then, to find that this Focus Area represented only 6% of Primary Focus Area Investments and 6% of Total Focus Area Investments. \$615,875 was spent on investments that relate to Agricultural & Culinary Tourism in some way. Of that amount, nearly half (\$276,500) went towards the Finger Lakes Wine Center. The change over time graph below shows the influence of that project, particularly from 2007-2009. The other notable year, 2013, is largely the result of the Ithaca Farm-To-Table Culinary Tourism Initiative Strategic Tourism Implementation Grant.

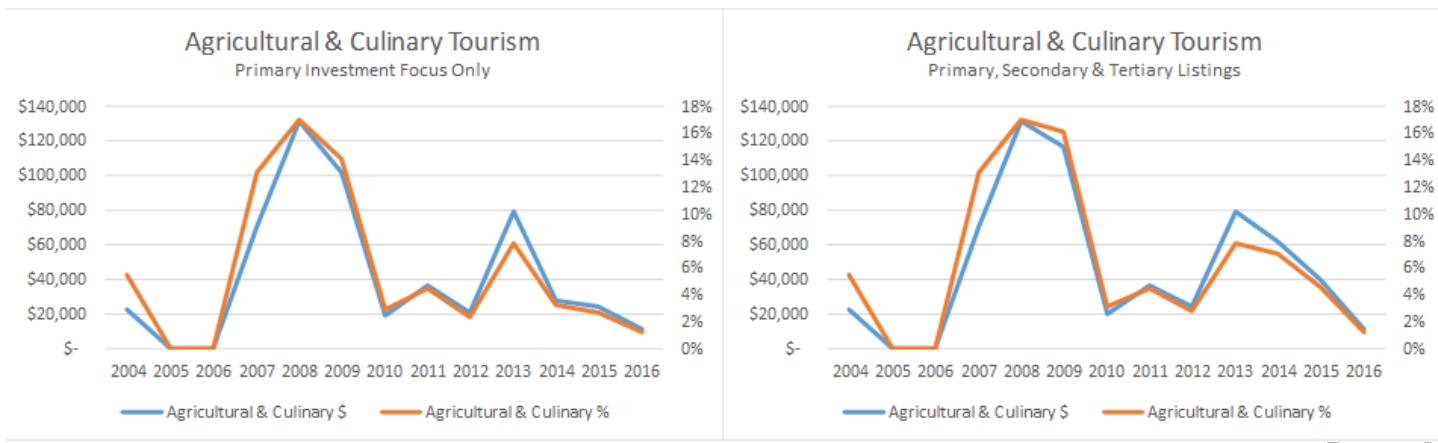


Figure 4-I

## Arts, Culture & Heritage Tourism

Arts, Cultural & Heritage Tourism was by far the most heavily-invested of the Focus Areas. \$6,174,997 was allocated to this Focus Area overall, which was 65% of all Focus Area spending. When only Primary Focus Area Investments are considered, Arts, Cultural & Heritage Tourism accounted for 44% of allocations, a little more than \$4,000,000. Over time, investment increased slowly but steadily; as a percentage of the total, however, Arts, Cultural & Heritage Tourism declined slightly over the study period.

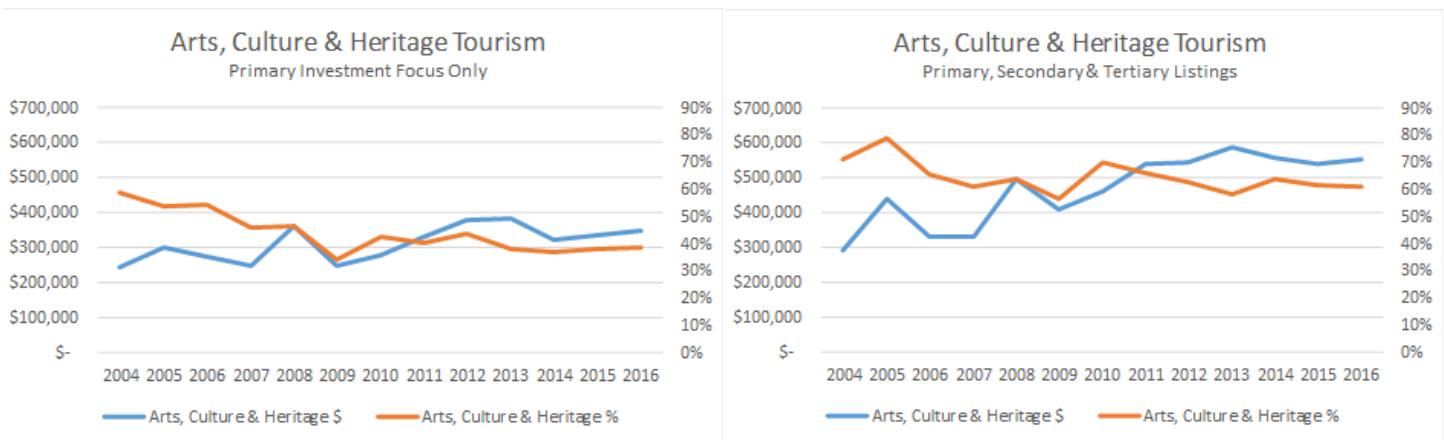


Figure 4-J

## Downtown Ithaca

Few investments are primarily intended for the benefit of Downtown, but many do support institutions or projects that are based downtown. Of those that are principally focused on Downtown, some of the more notable include the 2013 Commons Kiosks and the 2016 Conference/Meeting Facility Feasibility Study. In total, about \$244,000 went to investments where Downtown Ithaca was the primary driver. When all listings for this Focus Area are combined, however, that number jumps to over \$4,000,000, as investments in the State Theatre, the History Center and more are added. Generally, real dollar spending on Downtown Ithaca increased, but as a percentage of themed Focus Area investment, it declined.



Note: because the difference between the Downtown Ithaca graphs is so great, they are the only pair of graphs shown at differing scales      Figure 4-K

## Educational Tourism

Educational Tourism was the top Focus Area for a little over \$2,000,000 in funding, or around 22% of themed Focus Area investment. About 75% of that went to the Museum of the Earth, Cayuga Nature Center, and the Sciencenter. When secondary and tertiary listings are included, the total increases to around \$2,630,000, or 28%, largely due to the History Center.



Figure 4-L

## Outdoor Tourism

Primary Focus Area Investment in Outdoor Tourism was very low for the first seven years of the study period, before increasing substantially after 2011. The major drivers of this shift were the Stewart Park enhancements and the Blueway Trail.

When projects for which Outdoor Tourism was a secondary or tertiary focus are included, the increase in investment happens earlier. Spending rose from 2006-2009 with the funding of the Cayuga Nature Center, the International Dragon Boat Festival, and the Cayuga Lake Triathlon, among others, and stayed relatively consistent for the remainder of the study period, at around \$100,000 annually.



Figure 4-M

## Sports Tourism

Primary Focus Area Investment in Sports Tourism was generally low and steady, supported by the previously-mentioned Dragon Boat Festival and Cayuga Lake Triathlon. The peak in 2012 comes from a \$33,000 grant for the Ithaca Skate Park renovation.

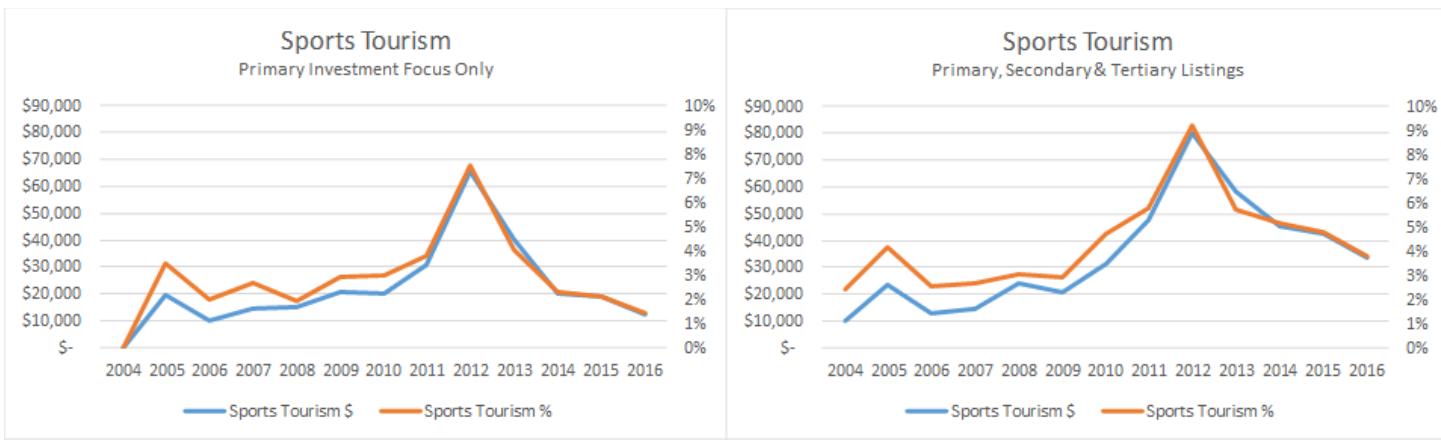


Figure 4-N

## Sustainability Tourism

Only three investments were primarily directed at Sustainability Tourism during the study period, totaling \$6,125. They were small grants for a Sustainable Transportation Conference, a Green Buildings Open House, and a Cayuga Eco-Cruise. There were another eleven that could be considered Sustainability Tourism in a secondary or tertiary way, including investments in the Ithaca Farmers Market, Ithaca Bike Rental, and Ithaca Children's Garden's "Compost to Cuisine" event, for a total of \$72,738, 1% of the total.



Figure 4-O

## Undertapped Niche Markets

There is only one change-over-time graph for this Focus Area because no tourism investments have been primarily focused on Undertapped Niche Markets. This is not surprising, as this is not a tourism type so much as a target market. Like Downtown Ithaca investments, it is more revealing to look at all listings combined. There, investment is shown to have increased substantially, if unevenly, over the last six years. The increase is connected to several projects, including the Ithaca Skate Park and Skate Jam, the Cayuga Lake Blueway Trail, Can You Canoe Cayuga, Ice Climbing Tourism Development, and Wizarding Weekend - all of which tailor to "highly focused demographic and interest-based visitor markets" (2020 Strategic Tourism Plan, pg. 27). Overall investment totaled about \$200,000, 2% of the total.

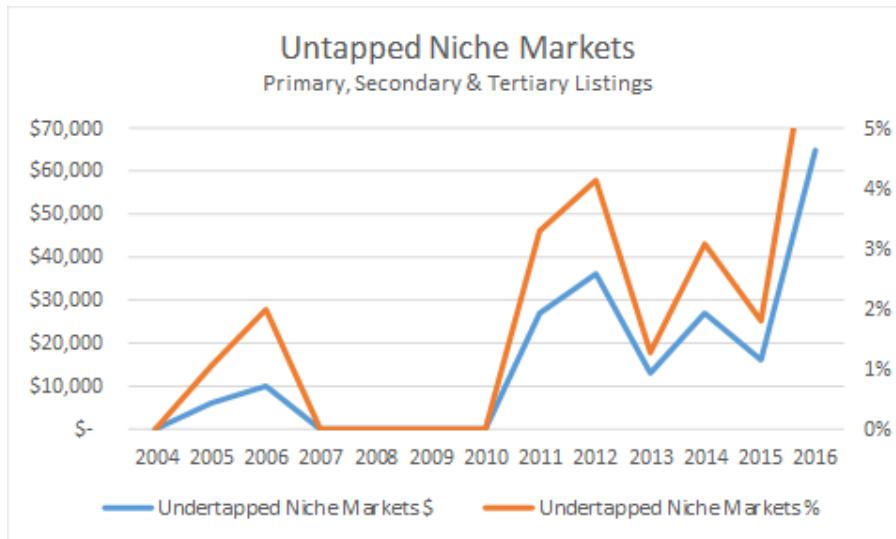


Figure 4-P

## Tourism Foundation

The seven Tourism Foundation categories received immensely different levels of investment. A few received quite a bit: as explored in the “Product v. Marketing” section, Marketing & Advertising constituted about 60% of the Tourism Program’s entire discretionary budget, and around 8% of that came from outside the CVB. Beautification, too, saw substantial investment. Beyond the official Beautification, Signage & Public Art program, which received \$1.5 million during the study period, the Tourism Program distributed another \$320,000 to projects that relate to this Focus Area in some significant way—for example, the 2013 “Wayfinding and Interpretive Signage Plan” STI Grant. The third prominent category, Festivals, was allocated \$1,324,510, with about 15% of that number coming from the Festivals program, while the remainder came from grants to support individual festivals.

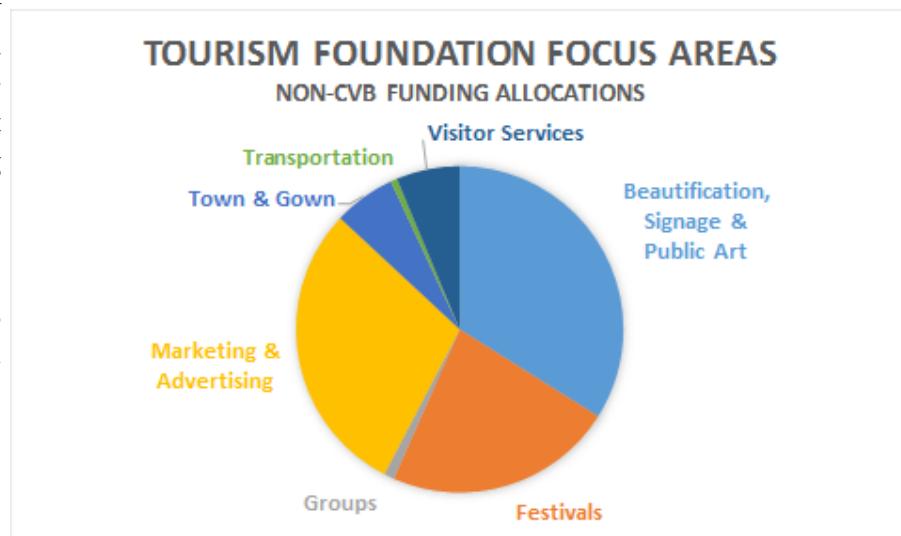


Figure 4-Q

Among the remaining four Tourism Foundation types, Visitor Services saw the most non-CVB investment, with about \$400,000 going towards that Focus Area. Examples include Workforce Development training and the Commons Information Kiosks. Town & Gown saw a little more than \$300,000 in investment, most of which stems from including the Cayuga Chamber Orchestra in this category due to their connection to Ithaca College.

Groups, another primary emphasis of the CVB, received \$78,000 in non-CVB investment, half of which came from the 2016 feasibility study for the Downtown Ithaca Conference & Meeting Facility. Finally, transportation is the least-funded of the Tourism Foundation Focus Areas, with \$42,000 invested. About half of that funding came from two Roy H. Park Preserve Access Improvements grants, and the other half from Ithaca Bike Rental grants.

## *Part Five: Feasibility Studies*

Throughout the study period the Tourism Program funded twenty-five Feasibility Studies, totaling \$352,600, through Tourism Capital Grants, Strategic Tourism Implementation Grants, and New Tourism Initiative Grants. Of these, seven have been implemented, seven are in the implementation stage, eight are in progress, two were not implemented, and one was implemented but unsuccessful.

Year	Study	Cost	Result
2004	Finger Lakes Wine Center (Phases 1 & 2)	\$12,500	Implemented, but closed after two years
2006	Eight Square Schoolhouse Structural Study	\$10,000	Implemented
2008	Stewart Park Rehab Action Plan	\$15,000	Study Completed; Implementation in Progress
2008	Cayuga Nature Center Design	\$13,500	Implemented
2008	Kitchen Theatre 1	\$13,000	Implemented
2009	Kitchen Theatre 2	\$21,000	Implemented
2009	Ithaca Motion Picture Project (IMPP) Business Plan	\$5,000	Implemented
2010	Dorothy Cotton Institute	\$7,500	Study Completed; Not Implemented
2010	Stewart Park Building Study	\$15,000	Study Completed; Implementation in Progress
2012	Stewart Park Landscape Rehab	\$10,000	Study Completed; Implementation in Progress
2012	State Theatre Restrooms	\$3,780	Implemented
2013	History Center/IMPP Partnership	\$7,500	Study Completed; Implementation in Progress
2013	History Center/IAHF (Tommy) Partnership	\$7,500	Study Completed; Implementation in Progress
2013	Galaxy Golf Prototype	\$12,500	Implemented
2013	Hangar Theatre For All Seasons	\$5,000	Canceled, Funds Returned
2013	Community School of Music and Arts Third Floor Performance Space	\$8,000	Study Completed; Implementation in Progress
2013	Wayfinding & Interpretive Signage Plan	\$62,970	Study Completed; Implementation in Progress
2014	Ice Climbing Tourism Development	\$13,800	Study In Progress
2015	Ithaca Children's Garden Very Hungry Caterpillar	\$16,000	Study In Progress
2015	Stewart Park 5-Year Priority Plan	\$20,000	Study In Progress
2016	Blueway Trail Design Study	\$10,000	Study In Progress
2016	Downtown Ithaca Meeting Facility	\$40,000	Study In Progress
2016	Athletic Field Space Tourism Potential	\$5,000	Study In Progress
2016	State Theatre Lobby Expansion	\$9,000	Study In Progress
2016	Wharton Exhibits Design	\$9,050	Study In Progress

Table 4-A

The number of studies has increased in recent years. With more resources being invested in these studies, it would be beneficial to analyze each for overall return on investment, especially as many of the implemented projects required further TCTP funding.

## 5. Geographic Distribution

### Key Takeaways:

1. 85% of grants, and 88% of grant dollars spent, went to an institution, program or project linked to a specific municipality.
2. 65% of grants, and 69% of grant dollars spent, was linked to the City of Ithaca, but that share of the total generally decreased over the study period as more grant dollars went to county-wide or multi-municipal projects.
3. Community Celebrations Grants were the key source of grant funding for many of the county's rural municipalities. 126 Community Celebrations Grants, totaling \$146,000, went to municipalities outside of the City and Town of Ithaca and the Town of Ulysses/Village of Trumansburg. Among all other grant types, 14 grants went to these municipalities.

This section considers grants only, using the same dataset as section three. It does not include Community Celebrations, only the other six grant types — ACOD, TCG, TPG, TMA, NTI, and STI.

The 512 tourism grants awarded by the Tompkins County Tourism Program were distributed both to programs and projects whose focus was county-wide, and to those whose emphasis was primarily in one of the county's 16 municipalities. Unsurprisingly, a large majority of grant investments (332 grants) focused on the City of Ithaca, Tompkins County's principle tourism driver. A substantial percentage also went to county-wide or multi-municipal initiatives (76), to the Town of Ithaca (52), and to the Town of Ulysses/Village of Trumansburg (32), while 14 grants went to 5 of the county's other towns and villages.

Because of the number of anchor recipients located in the City and Town of Ithaca, the percentage of grant funds distributed to these municipalities was even greater than the number of grants would indicate. Together, the City and Town of Ithaca received nearly \$5 million in grant funding. The City of Ithaca alone accounted for 69% of grant spending, but that percentage generally decreased over the study period. This was largely due to an increase in allocation to county-wide or multi-municipal grants, driven in part by the introduction of Strategic Tourism Implementation Grants.

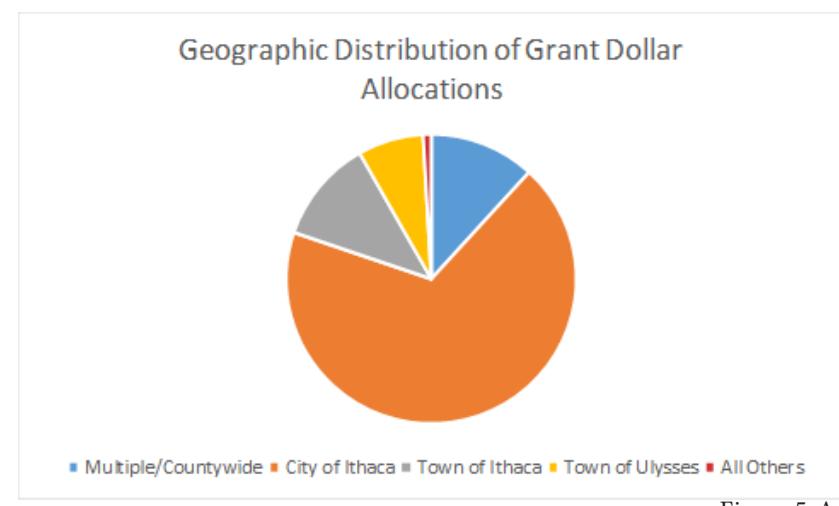


Figure 5-A

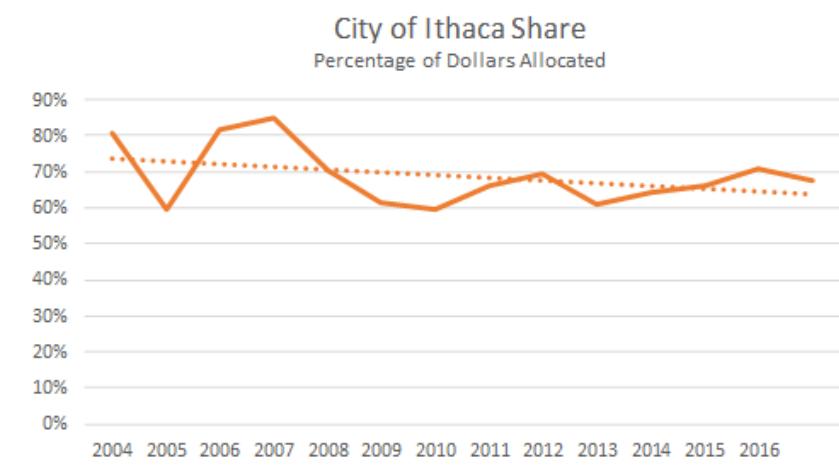


Figure 5-B

Community Celebrations Grants have been a primary source of grant funding for Tompkins County municipalities outside of the City and Town of Ithaca. When those 289 grants are added to the 512 analyzed above, the total municipalities represented jumps to 15, with the Village of Freeville the only exception. Fully half of Community Celebrations Grants (142 of them) went to Tompkins County municipalities that are not the Town or City of Ithaca or the Town of Ulysses/ Village of Trumansburg. Despite the small average size of a Community Celebrations Grant, this increases the total Tourism Program grant allocation to these other municipalities from \$55,000 to \$200,000 during the study period.

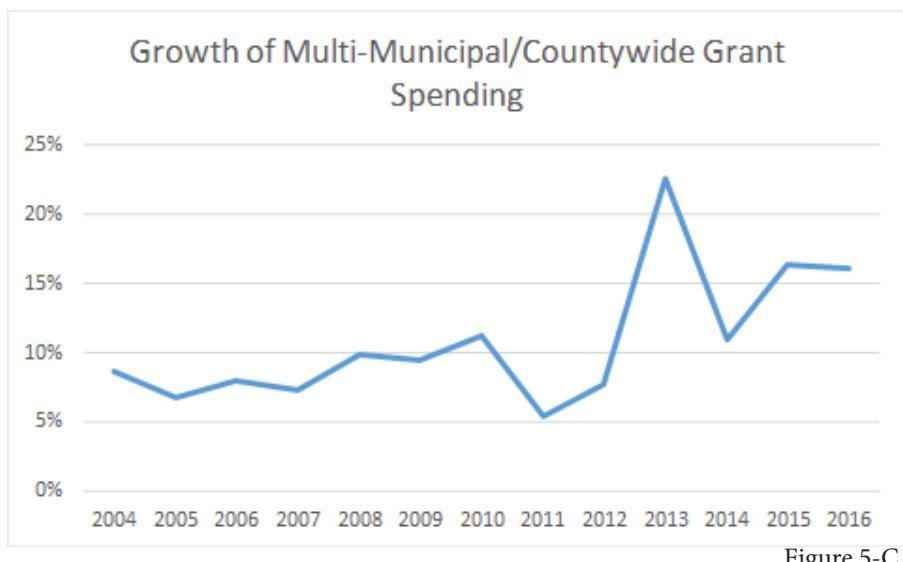


Figure 5-C

# 6

## Conclusions

This brief conclusion provides recommendations for further study and four takeaways from the analysis, two of which affirm the current investment patterns of the TCTP, and two of which suggest possible adjustments for future investment.

### *Recommendation For Further Study*

#### **1. Consider conducting select analyses on CVB investments**

Many of the most revealing analyses in this report consider grant investments only. Although more complex, an analysis of CVB investment across Focus Areas, for seasonality, and for long term/short term balance would add to the board's understanding of investment in these categories. Similar exercises could also be conducted for other non-grant programs where appropriate.

#### **2. Consider a short report comparing past investment with visitor tendencies after the visitor profile study**

This report will be most helpful when considered in tandem with an updated visitor profile study. Once the study is complete in mid-2018, it could be analyzed according to the same factors considered here. Investment adjustments could be considered according to the results.

#### **3. Expand and develop ROI calculations**

The calculations considered in the appendix only scratch the surface of investment ROI. A more robust method, perhaps developed with the assistance of the Cornell Office for Research on Evaluation, would be worth exploring. It must be noted, however, that a major challenge or caveat for any such project is the incorporation of soft ROI (beyond room nights and visitor spending) including: consideration of impacts on destination image, long-term visitor satisfaction, institutional development, and contributions to the tourism "infrastructure" that is part of enhancing the overall appeal of the community as a destination over time.

## *Four Takeaways from the Study*

### **1. The TCTP is meeting many of its investment goals**

TCTP investment is already aligned with many elements of the vision outlined in the 2020 Strategic Tourism Plan: the Marketing /Product Development 60/40 split, the rate of feasibility study implementation, the completion of capital projects, the introduction of new grantees, or, as described below, the continuation rate of funded institutions and events.

### **2. Project durability is high**

By and large, projects funded by the TCTP have proved durable. Much of the funding that went to no-longer-operational projects is limited to just three: the Light in Winter Festival, the Ticket Center, and the Wine Center. The latter two have been analyzed extensively.

### **3. Focus Area investment levels vary widely, and could potentially benefit from adjustment**

The wide range in funding for each of the Focus Areas is noteworthy. This report should be particularly useful in giving the board a basis to discuss the level of funding for each, and to determine if that level is where the board would like it to be.

### **4. The balance of short-term and long-term grant investments may deserve consideration**

Another notable finding is the shift in the balance between long-term oriented grants and short-term oriented grants. That shift is due to the number of grants for short-term projects (events and temporary exhibits) increasing more quickly than long-term grants, while average grant amounts for each remained consistent. As with Focus Areas, this report can provide a basis for the board to discuss investment priorities.

## 1. Spreadsheet Column Descriptions

### 1. Year

The year listed is always the year in which the non-grant funding was budgeted or the grant award distributed. Some grants, especially Tourism Capital Grants, are multi-year grants that are awarded once, but distributed over more than one year. Where that is the case, there will be an entry for each year of distribution, which together will add up to the total grant award.

### 2. Investment Type

Entries are classified according to whether they are an applied-for grant, a budget line item, a grant administrative fee, an administrative function, or TCAD Support. Strategic Planning and Staffing, which is overseen by the STPB but which supports all aspects of the Tourism Program, is classified by itself. Beautification, Signage & Public Art is classified entirely as a budget line-item program, even though a small portion of funds have been distributed to rural municipalities via grants overseen by the Cornell Cooperative Extension. To avoid double counting, overall grant program budgets are not included. A separate, program-only spreadsheet was also populated, and it includes the overall grant program allocation figures for easy reference.

### 3. Type

The names of grants and programs were unified for ease of analysis. For example, Arts & Culture Organizational Development (ACOD) grants, which were known as Arts & Culture Organizational Stabilization grants, are always referred to by their current name (ACOD), even in older entries.

### 4. Recipient

Similar to changes made for Type, recipient names were aligned to reflect current titles. Entries that were labeled “Dewitt Historical Society” for example, are now under “The History Center”. In addition, several organizations act as umbrellas for those receiving a grant. For example, the Downtown Ithaca Alliance collects funds for Wizarding Weekend. In those cases, the grant is distinguished from other funds received by that organization.

## 5. Use/Project

Where possible, entries in this column have been simplified and unified. Specifying information, however, has been retained, such as the year of the event if it differs from the year funds were allocated.

## 6. Amount

As noted in the Data section, the amount listed always reflects the modified budget.

## 7. Focus Areas

This classification makes up three columns of the spreadsheet, so that each investment can be assigned a primary and, when appropriate, secondary and tertiary Focus Area. The 15 Focus Areas in the Strategic Tourism Plan are divided into three categories: Established Tourism Types, Emerging Tourism Types, and Tourism Foundation. In classifying flexible investments such as grants, priority was given to the first two categories, which are more thematic in nature. In a separate spreadsheet, columns for primary and secondary Tourism Foundation categories were populated to inform discussion of these goals.

## 8. Municipality

If an investment supports an event or organization within one county municipality, that municipality is listed. Any investment that is not rooted in one municipality (for example, the “Can You Canoe Cayuga?” event) is listed as “Multiple/Countywide”.

## 9. Project Type

Investments were divided into three categories: Event/Exhibit, Institutional, and Infrastructure. Institutional was defined as a long-term investment made in a specific tourism partner. Infrastructure includes visitor services, signage, general marketing efforts, and other long-term investments that go beyond one organization or are not tied to an organization per se (like investments in parks and trails).

## 10. Product/Marketing

This category simply indicates whether the investment went towards marketing & advertising, towards product development of some type, or could be used for either. Tourism Capital Grants (TCG), Tourism Project Grants (TPG), Community Celebrations Grants (CC), and Arts & Cultural Organizational Support Grants (ACOD) are “Product” and Tourism Marketing & Advertising Grants (TMA) and New Tourism Initiative Grants (NTI) are “Marketing”. Among the programs, eight are Product (Beautification, the County Historian, Festivals, the Ticket Center, Workforce Development, ACOD Administration, Community Arts Partnership (CAP) Support, and TCG Administration) and four are Marketing (the Convention & Visitors Bureau (CVB), Discovery Trail, Market the Arts and the Tourism Partner Award). The County 10% and Tompkins County Area Development (TCAD) Support, as well as Strategic Tourism Implementation Grants and Strategic Planning & Staffing, are classified as “Flex”.

## 11. Attendees

Attendance figures were populated for a sample of ten events of varying sizes, covering 2011-2016, and six TCTP-funded institutions, covering 2004-2016.

## 12. Out-of-County Attendees

The sample for this category matches the Attendees category.

## 13. Season

Investments were classified according to whether they were tailored to a specific season: Peak (late May-early October), Shoulder (late October-late December and late March-late May), or Winter (late December-late March). Those that did not were labeled “Multi-Season”.

## 14. Still Extant

This classification simply asks whether the investment was made in an event, institution, or piece of infrastructure that remains active and ongoing. Entries were given a “Y”, “N”, or left blank if conclusive evidence one way or the other could not be found.

## 15. Still Funded by the TCTP

This category labels those investments that are still extant as either still receiving funding (“Y”) or no longer receiving funding (“N”). Again, where the answer is unclear, the entry is left blank.

## 2. ROI Explorations

This appendix combines visitor spending data with attendance data from events and institutions to determine a rough, highly conservative sense of return on investment.

Accurately measuring event attendance is a challenge for organizations, especially at the many free events the TCTP supports. In recent years, however, with the support of the TCTP, many have emphasized the collection of attendance information. While numbers obtained are generally not perfect, they do give a good sense of the magnitude of a given event. Corollaries to the attendance figure are the percentage of attendees who come from outside of the county and the percentage of out-of-county attendees who came to Tompkins County primarily for the event. For some events, registration has provided a reliable way of discerning these numbers.

Thanks to a 2009 Visitor Profile Study by Chmura Economics & Analytics, average spending figures for all tourists, as well as for overnight and daytrip tourists, do exist, though at this point they are eight years old. Their age is the primary reason that estimates of return are conservative: the numbers come from the height of the recession, and are likely lower than real average spending throughout the study period. The next Visitor Profile Study is anticipated to conclude in mid-2018, providing updated numbers. The 2009 study determined that the average spending for all visitors is \$185 per trip to the county, while for overnight visitors that jumps to \$265, and for day-trippers it drops to \$51.

Using the above information, a formula can be developed that establishes ROI for any event. That formula is displayed below, followed by examples of the calculation for several events.

A	B	C	D	E	F	G	H	I	J	K
1 Tan Highlight = Manually entered column										
2										
3										
4	Applicant	Grant Type	Project	Award	Attendees	Grant Expense/Attendee	% From Outside County	# From Outside County	Grant Expense per OOC Attendee	% OOC for whom event is main reason for visiting
5						=D5/E5			=D5/H5	
	L	M	N	O	P	Q	R	S		
Trip Spending Averages:				All	Daytrips	Overnight				
				185	51	265				
Total spending by OOC Attendees	ROI per OOC attendee	ROI adjusted for "primary reason"	ROI adjusted for "primary reason" and multi-year benefit		% day-trippers	% overnight	Overnight attendees	Grant expense per overnight attendee		
=\$O\$2*\$H5	=L5/D5	=M5*J5	=N5*K5				=H5*Q5	=D5/R5		
	=Z\$12	=Z\$12*(Z\$12-H5)	=Z\$12*(Z\$12-H5)				=X\$12	=X\$12		
	T	U	V	W	X	Y				

**Event: Downtown Ithaca Winter Festival**

**Grants: TPG & TMA**

**Assumed % of OOC Attendees for Whom Event is Primary Reason for Visit: 50%**

2011:

Award: \$18,000

Attendance: 6,100

Out of County Attendance: 915

ROI per OOC Attendee, Adjusted (from column O): \$4.70

ROI per Segmented OOC Attendee (from column Y): \$4.56

2012:

Award: \$15,000

Attendance: 7,500

Out of County Attendance: 1,125

ROI per OOC Attendee, Adjusted (from column O): \$6.94

ROI per Segmented OOC Attendee (from column Y): \$6.73

2013:

Award: \$16,513

Attendance: 6,600

Out of County Attendance: 600

ROI per OOC Attendee, Adjusted (from column O): \$3.36

ROI per Segmented OOC Attendee (from column Y): \$3.26

2014:

Award: \$17,000

Attendance: 10,000

Out of County Attendance: 2,000

ROI per OOC Attendee, Adjusted (from column O): \$10.88

ROI per Segmented OOC Attendee (from column Y): \$10.55

**Event: Scottish Games & Celtic Festival**

**Grants: TPG & TMA**

**Assumed % of OOC Attendees for Whom Event is Primary Reason for Visit: 60%**

2011:

Award: \$16,500

Attendance: 3,120

Out of County Attendance: 1,685

ROI per OOC Attendee, Adjusted (from column O): \$11.34

ROI per Segmented OOC Attendee (from column Y): \$10.99

2012:

Award: \$12,000 (TPG Only)

Attendance: 3,200

Out of County Attendance: 1,728

ROI per OOC Attendee, Adjusted (from column O): \$15.98

ROI per Segmented OOC Attendee (from column Y): \$15.50

2013:

Award: \$13,425

Attendance: 3309

Out of County Attendance: 1811

ROI per OOC Attendee, Adjusted (from column O): \$14.97

ROI per Segmented OOC Attendee (from column Y): \$14.52

***Event: Can You Canoe Cayuga?***

***Grants: NTI, TPG & TMA***

***Assumed % of OOC Attendees for Whom Event is Primary Reason for Visit: 75%***

2012:

Award: \$3,000 (NTI)

Attendance: 130

Out of County Attendance: 30

ROI per OOC Attendee, Adjusted (from column O): \$1.39

ROI per Segmented OOC Attendee (from column Y): \$1.35

2013:

Award: \$4,000 (NTI & TMA)

Attendance: 110

Out of County Attendance: 55

ROI per OOC Attendee, Adjusted (from column O): \$1.91

ROI per Segmented OOC Attendee (from column Y): \$1.85

2014:

Award: \$4,200 (NTI & TMA)

Attendance: 112

Out of County Attendance: 27

ROI per OOC Attendee, Adjusted (from column O): \$0.89

ROI per Segmented OOC Attendee (from column Y): \$0.86

2015:

Award: \$2,000 (TPG)

Attendance: 73

Out of County Attendance: 24

ROI per OOC Attendee, Adjusted (from column O): \$1.67

ROI per Segmented OOC Attendee (from column Y): \$1.61

***Event: Summer Shakespeare Festival***

***Grants: TPG & TMA***

***Assumed % of OOC Attendees for Whom Event is Primary Reason for Visit: 50%***

2012:

Award: \$13,000

Attendance: 4,000

Out of County Attendance: 1,240

ROI per OOC Attendee, Adjusted (from column O): \$8.82

ROI per Segmented OOC Attendee (from column Y): \$8.56

2013:

Award: \$11,500  
Attendance: 4,000  
Out of County Attendance: 1,080  
ROI per OOC Attendee, Adjusted (from column O): \$8.69  
ROI per Segmented OOC Attendee (from column Y): \$8.42

2014:

Award: \$10,000  
Attendance: 3,698  
Out of County Attendance: 1,109  
ROI per OOC Attendee, Adjusted (from column O): \$10.26  
ROI per Segmented OOC Attendee (from column Y): \$9.95

2015:

Award: \$9,000  
Attendance: 3,734  
Out of County Attendance: 1,306  
ROI per OOC Attendee, Adjusted (from column O): \$13.42  
ROI per Segmented OOC Attendee (from column Y): \$13.02

2016:

Award: \$7,000  
Attendance: 2,595  
Out of County Attendance: 959  
ROI per OOC Attendee, Adjusted (from column O): \$12.67  
ROI per Segmented OOC Attendee (from column Y): \$12.29

***Event: Ithaca Fantastik***

***Grants: NTI, TPG & TMA***

***Assumed % of OOC Attendees for Whom Event is Primary Reason for Visit: 40%***

2012:

Award: \$13,600  
Attendance: 225  
Out of County Attendance: 43  
ROI per OOC Attendee, Adjusted (from column O): \$0.23  
ROI per Segmented OOC Attendee (from column Y): \$0.23

2013:

Award: \$16,100  
Attendance: 350  
Out of County Attendance: 87  
ROI per OOC Attendee, Adjusted (from column O): \$0.40  
ROI per Segmented OOC Attendee (from column Y): \$0.39

2014:

Award: \$19,925  
Attendance: 725  
Out of County Attendance: 276

ROI per OOC Attendee, Adjusted (from column O): \$1.03  
ROI per Segmented OOC Attendee (from column Y): \$0.99

2015:

Award: \$17,000  
Attendance: 1,400  
Out of County Attendance: 434  
ROI per OOC Attendee, Adjusted (from column O): \$1.89  
ROI per Segmented OOC Attendee (from column Y): \$1.83

2016:

Award: \$15,600  
Attendance: 1,600  
Out of County Attendance: 445  
ROI per OOC Attendee, Adjusted (from column O): \$2.11  
ROI per Segmented OOC Attendee (from column Y): \$2.05

***Event: Spring Writes Literary Festival***

***Grants: NTI, TPG & TMA***

***Assumed % of OOC Attendees for Whom Event is Primary Reason for Visit: 50%***

2011:

Award: \$4,000  
Attendance: 900  
Out of County Attendance: 200  
ROI per OOC Attendee, Adjusted (from column O): \$4.63  
ROI per Segmented OOC Attendee (from column Y): \$4.49

2012:

Award: \$5,750  
Attendance: 1800  
Out of County Attendance: 540  
ROI per OOC Attendee, Adjusted (from column O): \$8.69  
ROI per Segmented OOC Attendee (from column Y): \$8.42

2013:

Award: \$6,250  
Attendance: 1,900  
Out of County Attendance: 740  
ROI per OOC Attendee, Adjusted (from column O): \$10.95  
ROI per Segmented OOC Attendee (from column Y): \$10.62

2014:

Award: \$6,750  
Attendance: 1,200  
Out of County Attendance: 250  
ROI per OOC Attendee, Adjusted (from column O): \$3.43  
ROI per Segmented OOC Attendee (from column Y): \$3.32

2015:

Award: \$6,573  
Attendance: 940  
Out of County Attendance: 75  
ROI per OOC Attendee, Adjusted (from column O): \$1.06  
ROI per Segmented OOC Attendee (from column Y): \$1.02

2016:

Award: \$6,770  
Attendance: 1000  
Out of County Attendance: 100  
ROI per OOC Attendee, Adjusted (from column O): \$1.37  
ROI per Segmented OOC Attendee (from column Y): \$1.32

***Event: Ithaca Skate Jam***

***Grants: NTI & TMA***

***Assumed % of OOC Attendees for Whom Event is Primary Reason for Visit: 50%***

2014:

Award: \$9,000  
Attendance: 2,306  
Out of County Attendance: 1,306  
ROI per OOC Attendee, Adjusted (from column O): \$13.42  
ROI per Segmented OOC Attendee (from column Y): \$13.02

2015:

Award: \$9,000  
Attendance: 3,200  
Out of County Attendance: 1,700  
ROI per OOC Attendee, Adjusted (from column O): \$17.47  
ROI per Segmented OOC Attendee (from column Y): \$16.94

2016:

Award: \$14,000  
Attendance: 3,700  
Out of County Attendance: 2,200  
ROI per OOC Attendee, Adjusted (from column O): \$14.54  
ROI per Segmented OOC Attendee (from column Y): \$14.10

***Event: Restaurant Week/A Bite of Ithaca***

***Grants: NTI, TPG & TMA***

***Assumed % of OOC Attendees for Whom Event is Primary Reason for Visit: 50%***

2011:

Award: \$8,000  
Attendance: 1,000  
Out of County Attendance: 100  
ROI per OOC Attendee, Adjusted (from column O): \$1.16

ROI per Segmented OOC Attendee (from column Y): \$1.12

2012:

Award: \$10,500

Attendance: 3,900

Out of County Attendance: 780

ROI per OOC Attendee, Adjusted (from column O): \$6.87

ROI per Segmented OOC Attendee (from column Y): \$6.66

2013:

Award: \$10,500

Attendance: 6112

Out of County Attendance: 916

ROI per OOC Attendee, Adjusted (from column O): \$8.07

ROI per Segmented OOC Attendee (from column Y): \$7.83

2016:

Award: \$2,500

Attendance: 1,200

Out of County Attendance: 336

ROI per OOC Attendee, Adjusted (from column O): \$12.43

ROI per Segmented OOC Attendee (from column Y): \$12.06

***Event: Winter Village Bluegrass Festival***

***Grants: NTI, TPG & TMA***

***Assumed % of OOC Attendees for Whom Event is Primary Reason for Visit: 50%***

2013:

Award: \$12,000

Attendance: 430

Out of County Attendance: 145

ROI per OOC Attendee, Adjusted (from column O): \$1.12

ROI per Segmented OOC Attendee (from column Y): \$1.08

2014:

Award: \$15,500

Attendance: 665

Out of County Attendance: 220

ROI per OOC Attendee, Adjusted (from column O): \$1.31

ROI per Segmented OOC Attendee (from column Y): \$1.27

2015:

Award: \$16,000

Attendance: 705

Out of County Attendance: 245

ROI per OOC Attendee, Adjusted (from column O): \$1.42

ROI per Segmented OOC Attendee (from column Y): \$1.37

A study attempting to estimate return on investment for capital projects would be highly valuable, but is beyond the scope of this report. The key additional piece of information needed for such a study is the impact of a capital project on the institution or infrastructure it supports. In other words, a reasonable way of calculating a multiplier that describes the impact of a change to an existing institution is currently lacking. It is one thing to determine that someone came to Tompkins County primarily to visit the Sciencenter, and another to determine the extent to which the addition of a new attraction at the Sciencenter drove their decision.

An alternative, more fundamental measure is to compare investment in an institution with out-of-county attendance at that institution, using the same formula as that used for events. Below, a few examples of this exercise are listed, but comprehensive review is not feasible. Institutions have not been able to collect reliable attendance data every year, and several have changed techniques during the study period, rendering change-over-time depictions inaccurate.

Note: all OOC visitor estimates provided by the institution in their TCG reporting

***Institution: The State Theatre***

***Assumed % of OOC Attendees for Whom Institution is Primary Reason for Visit: 50%***

2007:

Award (four grants): \$22,000

Visitors: 39,563

Out of County Visitor % Estimate: 23%

ROI per OOC Attendee, Adjusted (from column O): \$114.78

ROI per Segmented OOC Attendee (from column Y): \$37.10

2015:

Award four grants): \$47,000

Attendance: 58,322

Out of County Visitor % Estimate: 34%

ROI per OOC Attendee, Adjusted (from column O): \$117.08

ROI per Segmented OOC Attendee (from column Y): \$37.84

***Institution: The Sciencenter***

***Assumed % of OOC Attendees for Whom Institution is Primary Reason for Visit: 20%***

2013:

Award (four grants): \$53,000

Visitors: 98,529

Out of County Visitor % Estimate: 38%

ROI per OOC Attendee, Adjusted (from column O): \$78.41

ROI per Segmented OOC Attendee (from column Y): \$25.35

2015:

Award four grants): \$65,327

Attendance: 102,914

Out of County Visitor % Estimate: 38%

ROI per OOC Attendee, Adjusted (from column O): \$61.20

ROI per Segmented OOC Attendee (from column Y): \$19.78

***Institution: The Hangar Theatre***

***Assumed % of OOC Attendees for Whom Institution is Primary Reason for Visit: 35%***

2012:

Award (four grants): \$54,513

Visitors: 28,570

Out of County Visitor % Estimate: 24%

ROI per OOC Attendee, Adjusted (from column O): \$24.43

ROI per Segmented OOC Attendee (from column Y): \$7.90

2013:

Award four grants): \$57,000

Attendance: 25,507

Out of County Visitor % Estimate: 24%

ROI per OOC Attendee, Adjusted (from column O): \$20.86

ROI per Segmented OOC Attendee (from column Y): \$6.74

### 3. All Funded Events/Exhibits

Use / Project	Award	# of Grants
Downtown Ithaca Winter Festival	\$ 143,093	18
Finger Lakes International Dragon Boat Festival	\$ 105,317	11
Light in Winter	\$ 83,238	8
Ithaca Fantastic Film Festival	\$ 82,225	10
Ithaca Scottish Games & Celtic Festival	\$ 69,675	13
Winter Village Bluegrass	\$ 68,250	8
Summer Season: The Ithaca Shakespeare Company	\$ 61,500	8
Climate Exhibit	\$ 50,000	2
Sciencenter: Marcellus Shale Exhibition	\$ 50,000	2
Restaurant Week	\$ 46,500	10
Spring Writes Finger Lakes Literary Arts Fest	\$ 40,468	13
Cayuga Lake Past and Present: An exhibit at the Cayuga Nature Center	\$ 40,000	3
Ithaca Skate Jam	\$ 35,800	6
Cayuga Trails 50	\$ 29,700	4
Cayuga Lake Triathlon	\$ 29,045	9
Ithaca Fringe Festival	\$ 24,975	4
Cayuga Lake Wine Trail Holiday Shopping Spree	\$ 24,000	5
Finger Lakes Grassroots Festival	\$ 23,000	3
Sciencenter Make Some Noise!	\$ 23,000	1
Wizarding Weekend	\$ 20,500	2
Ocean Exhibit	\$ 20,000	1
Red Hot Bluegrass Concert Series	\$ 20,000	1
Ithaca Brew Fest 2008	\$ 19,000	2
Grapehound Wine Tour	\$ 16,304	7
Ithaca Underground Events: Big Day In, Naked Noise and November Music Series (NMS) 2015-16	\$ 16,150	4
Ithaca Festival	\$ 16,080	4
Can You Canoe Cayuga?	\$ 15,200	7
One Fish, Two Fish, Old Fish, New Fish	\$ 15,000	2
Richard II at the Hangar Theatre	\$ 14,500	1
Forest Journey Exhibit	\$ 14,000	2
September Harvest Wine Fest	\$ 14,000	2
Curiosity Corner Outdoor Science Park	\$ 14,000	1
Mars Rover Exhibit	\$ 13,500	1
Cayuga Lake SUP Cup	\$ 13,324	6
Finger Lakes Beer & Cider Festival	\$ 13,000	1
Silent Film Exhibition	\$ 13,000	1
Hatching the Past: Dinosaur Eggs & Babies	\$ 12,500	2
HENRY V at the Hangar Theatre	\$ 11,920	1
Fresh Air for Families: Compost to Cuisine	\$ 10,200	2

Charles Darwin After the Origin Exhibit	\$ 10,000	2
Greater Ithaca Art Trail	\$ 10,000	2
Snake Stones of Ammon Exhibit	\$ 10,000	1
Cider Week	\$ 9,000	2
Come for the Gorges, Stay for a Show	\$ 8,700	2
Say Cheese along the Cayuga Lake Wine Trail	\$ 8,500	3
Macbeth at the Hangar Theatre	\$ 8,500	2
Cruisin' the Fossil Freeway	\$ 8,250	2
10th Anniversary Celebration of the Museum of the Earth	\$ 8,000	2
Finger Lakes Tap Dance Festival	\$ 8,000	2
MOTE Buzz Saw Sharks	\$ 7,890	2
Ithaca Night Market	\$ 7,533	2
Hangar Theatre's A CHRISTMAS CAROL	\$ 7,500	1
Smithsonian Project	\$ 7,000	1
Spring 2012 Shakespeare Season	\$ 6,380	1
The Tempest at the Hangar Theatre	\$ 6,040	1
CNC Layers of Life	\$ 6,000	2
BEHIND THE CAMERA: Tompkins County during the Wharton Studio Era	\$ 6,000	1
Raising the Dead: The Art and Science of John Gurche	\$ 6,000	1
Wine, Dine, Play & Stay	\$ 5,500	1
National Dance Week	\$ 5,000	2
Cayuga Chimes – Fingerlakes Barbershop Invitational	\$ 5,000	1
Commons Reopening Festivities	\$ 5,000	1
Finger Lakes Wine Center Grand Opening	\$ 5,000	1
Harvest Dinners on the Farm- Wine, Dine, Stay, & Play	\$ 5,000	1
Switched On: Tompkins County and the Birth of the Moog Synthesizer	\$ 4,500	2
Family Fun with Dr. Scott from PBS's Dinosaur Train	\$ 4,174	1
The Hip Hop Experience	\$ 4,000	1
Wine & Herb Festival	\$ 4,000	1
Exploring Human Origins: What it Means to be Human Marketing	\$ 3,973	1
Mardi Gras (15th Annual) on the Cayuga Lake Wine Trail	\$ 3,848	1
Finn Funn Weekend	\$ 3,500	2
Did Dinosaurs Poop? Your Prehistoric Digestion Connection	\$ 3,500	1
Earthdance Ithaca	\$ 3,500	1
Musefest	\$ 3,500	1
The Gardener's Trail	\$ 3,250	2
Dan Zanes & Friends Performance	\$ 3,000	1
Ithaca Theatre Collective	\$ 3,000	1
MapleFestival	\$ 3,000	1
Along the Shores of Time: Highlights from a National Monument Fifty Million Years in the Making	\$ 2,500	1
Cayuga Eco-Cruise Pilot	\$ 2,500	1
CHERRY SEASON	\$ 2,500	1

Dear Friend Amelia: A Civil War Tale	\$ 2,500	1
Ice Cream Sundae Public Relations	\$ 2,500	1
WHALES: From the Depths of the National Geographic Archives	\$ 2,500	1
Darwin Days - Baba Brinkman	\$ 2,300	1
Amber: Letting the Past Shine Through	\$ 2,250	1
Art, Aviation, and Architecture Exhibit	\$ 2,200	1
Cayuga Lake Scenic Byway Geocache Trail	\$ 2,000	1
Latino Heritage Month	\$ 2,000	1
Podcar City Sustainable Transportation Conference	\$ 2,000	1
Political Theater Series	\$ 2,000	1
Summer in the Finger Lakes Exhibition	\$ 2,000	1
West End Waterfront Rhiner Festival	\$ 2,000	1
Green Buildings Open House	\$ 1,625	1
Matinees with the Moose Series	\$ 1,500	1
Shakespeare Winter Season	\$ 1,500	1
The aMAIZEing Story of Corn	\$ 1,500	1
Traditions and Beyond Quilt Show	\$ 1,500	1
Web Marketing Campaign	\$ 1,500	1
MOTE Ancient Microworlds	\$ 1,000	1
Central NY Window Preservation Conference	\$ 750	1

## 4. All Grant Recipients

All Unique Recipients	Grant #	Total \$
PRI/Museum of the Earth (including CNC post-merger)	52	\$718,436
Hangar Theatre	28	\$571,115
State Theatre of Ithaca	30	\$512,824
Kitchen Theatre	21	\$490,856
Sciencenter	27	\$457,793
The History Center in Tompkins County	27	\$411,004
Cayuga Nature Center	21	\$354,512
Finger Lakes Wine Center	15	\$295,870
Cayuga Chamber Orchestra	13	\$295,384
Downtown Ithaca Alliance	36	\$289,843
Tompkins County Chamber of Commerce	5	\$124,640
Ithaca Shakespeare Company	16	\$115,340
Social Ventures - Dragon Boat	11	\$105,317
Light in Winter Festival, Inc.	9	\$102,238
Ithaca Children's Garden	7	\$85,600
Tompkins County Chamber Foundation	9	\$84,750
Cayuga Lake Wine Trail	19	\$70,652
Friends of Stewart Park	4	\$70,500
Community School of Music and Arts	4	\$70,000
Social Ventures - Temuchin Skate Fund	3	\$70,000
The History Center in Tompkins County - Celtic	11	\$58,425
City of Ithaca	9	\$57,800
Community Arts Partnership	17	\$55,468
Tompkins County Convention & Visitors Bureau	1	\$50,000
7th Art Corporation of Ithaca	5	\$49,525
Tompkins County Planning Department	2	\$43,480
Ithaca Motion Picture Project	4	\$31,600
Cayuga Lake Watershed Network	14	\$31,024
Ithaca Triathlon Club	9	\$29,045
Finger Lakes Land Trust	4	\$26,000
Ithaca Farmers Market	5	\$25,033
Wharton Studio Museum	3	\$24,650
Cornell Cooperative Extension of Tompkins County	7	\$23,375
Finger Lakes GrassRoots Festival	3	\$23,000
Ithaca Youth Bureau	5	\$22,000
Community School of Music and Arts - Fringe	3	\$21,000
Downtown Ithaca Alliance - Wizarding Weekend	2	\$20,500
NYS Brewers Association	2	\$19,000
Ithaca Festival	5	\$17,580

Wharton Studio Museum - Fantastic Film Fest	2	\$17,000
Ithaca Underground	4	\$16,150
Town of Ulysses	2	\$15,500
Cayuga Waterfront Trail Initiative	1	\$15,000
Natural Heritage Trust	1	\$13,800
Cooperative Extension Association of Tompkins County	1	\$13,000
BioDevelopments	2	\$11,250
NY farms! Campaign Inc	2	\$9,000
Center for the Arts at Ithaca	2	\$8,700
Tap Legacy Foundation	2	\$8,000
Tompkins County Public Library Foundation	2	\$7,973
Dorothy Cotton Institute	1	\$7,500
Village of Groton	2	\$7,000
Ithaca Theatre Collective	2	\$5,000
Cayuga Chimes	1	\$5,000
Community Foundation of Tompkins County	1	\$4,000
Fractured Atlas, Inc.	1	\$3,975
Finger Lakes Finns	2	\$3,500
Center for Environmental Sustainability	1	\$3,500
Musefest	1	\$3,500
The Cherry Arts, Inc.	1	\$2,500
Ecovillage at Ithaca, Inc.	1	\$2,000
The Savage Club of Ithaca	1	\$2,000
Ithaca United Soccer Club, Inc.	1	\$5,000
Cayuga Lake Scenic Byway	2	\$4,500
Tompkins County Quilter's Guild	1	\$1,500
Center for Transformative Action	1	\$1,000
Social Ventures - Dance Week	1	\$1,000
Historic Ithaca	1	\$750