



**CHARACTERISTICS AND ECONOMIC IMPACTS  
OF THE ALL SOULS PROCESSION STUDY**

(November 2013)

*Prepared for:*

MANY MOUTHS ONE STOMACH

Tucson, Arizona

*Prepared by:*

FMR ASSOCIATES, INC.

Tucson, Arizona

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# CHARACTERISTICS AND ECONOMIC IMPACTS OF THE ALL SOULS PROCESSION STUDY

(November 2013)

## Introduction and Goals

This Characteristics and Economic Impact Study, conducted for Many Mouths One Stomach, was designed to measure the specific direct, indirect and induced economic and revenue impacts that benefit Pima County by hosting the annual All Souls Procession (ASP) event in early November. In addition, this project was designed to profile (in general and economic terms) the two major constituency components of the All Souls Procession – including Participants and On-Lookers. Ultimately, these impacts and profiles will be used by Many Mouths One Stomach to assist in the marketing and funding of the All Souls Procession event.

This study included two major components: (1) an in-person survey of 2013 All Souls Procession weekend Participants and On-Lookers; and (2) development of economic models to assess the specific revenue impacts of the event and predict future impacts based on a variety of variables.

**Areas of Investigation** – The following areas of investigation were considered the central points for this Characteristics and Economic Impact Study:

1. **Economic/Demographic Profiling of All Souls Procession Weekend Participants** – What are the direct and indirect expenses involved in producing the artistic creations utilized during the event? What is spent on items such as entertainment, food and beverages, retail shopping, etc.? What is the proportion of local (Tucson) to non-local Participants? Among out-of-town Participants, what is spent on in-town transportation, lodging and other expenses? What is the mode of travel to and from Tucson? How do these direct and indirect revenues benefit Tucson and Pima County?
2. **Economic/Demographic Profiling of All Souls Procession Weekend On-Lookers** – How much do they pay for meals, retail shopping and other expenses? What is the proportion of local (Tucson) to non-local individual On-Lookers? Among out-of-town On-Lookers, what is spent on in-town transportation, lodging and other expenses? What is the mode of travel to and from Tucson? What are the economic impacts of local and non-local visits? How do these revenues benefit Tucson and Pima County?



Table I-2

Sex of Respondent

	Total	Type of Respondent		Out of Town	
		On- Looker	Participant	Yes	No
Men	49%	50%	48%	47%	49%
Women	51%	50%	52%	53%	51%
	<b>N=401</b>	N=202	N=199	N=53	N=348

# CHARACTERISTICS AND ECONOMIC IMPACTS OF THE ALL SOULS PROCESSION STUDY

(November 2013)

## *Executive Summary*

**Objectives and Methodology** – The following is a summary of key findings from the Characteristics and Economic Impact of the All Souls Procession (ASP) conducted by FMR Associates for Many Mouths One Stomach. The primary objective of this project was to measure the specific economic impacts that benefit Pima County by hosting the annual All Souls Procession among its two major constituencies: Participants (who march in the Procession) and On-Lookers (who watch the Procession).

A total of 401 interviews were conducted in-person by FMR during the 2013 All Souls Procession on Sunday, November 3<sup>rd</sup>. By design, the sample included a 50/50 mix of Participants and On-Lookers.

**2013 All Souls Procession Overview** – As reported by Many Mouths One Stomach, attendance at the 2013 All Souls Procession was 100,000. Based on our findings, we estimate attendance was comprised of 87,500 In-Town Attendees and 12,500 Out-of-Town Attendees (which represent 4,310 unique travel parties). Out-of-Town Attendees traveled to Tucson from 14 different states and two foreign countries to attend the 2013 All Souls Procession.

The majority are repeat ASP attendees who have been to the event two or more times (56%). The remaining 44% are first-time attendees. Average attendance is 3.6 years. For On-Lookers, the average is 3.0 years – compared to 4.2 years among Participants. Fully 89% of 2013 attendees say they will return for the All Souls Procession next year, regardless of On-Looker or Participant status. Just 1% of 2013 attendees say they will *not* return in 2014.

Does the All Souls Procession have a positive impact on attendees sense of belonging in Tucson? 89% say “yes,” including a similar share of On-Lookers and Participants. In addition, about one-half of attendees say the All Souls Procession made them feel empowered (54%) and/or civically engaged (49%). Just 19% indicate they felt *neither* empowered nor civically engaged.

**2013 All Souls Procession Expenditures and Economic Impacts** – We estimate a total of \$11,661,152 in expenditures (direct impacts) resulting from the 2013 All Souls Procession. The single largest expenditure category is for food & beverage (\$4,321,845) – followed by costume/float materials (\$3,322,875) and retail shopping (\$1,393,584).

Based on these direct expenditures, the IMPLAN model suggests a total economic impact of \$17,552,524 resulting from the 2013 All Souls Procession. This reflects the direct impacts estimated in this study (\$11,661,152) plus the resulting indirect (\$2,288,270) and induced (\$3,603,102) impacts.

These impacts are based on \$11,661,152 of direct expenditures associated with three key economic ASP components:

- **In-Town Attendees** (\$7,235,375 [or 62.0%] of all direct expenditures among an estimated 87,500 attendees. For locals, average spending for the ASP event is \$82.69 – with the largest share going towards costume/float material [\$34.21] and food/beverage [\$32.22] expenditures. Average ASP attendance among In-Town Attendees is 3.8 years.)
- **Out-of-Town Travel Parties** (\$4,333,877 [or 37.2%] of all direct expenditures among an estimated 4,310 travel parties [which represent 12,500 attendees]. On average, an out-of-town travel party stays in Tucson for 7.5 days and spends \$1,005.54 while here – with the biggest share going towards lodging [\$220.12] and food/beverage [\$348.63]. The average travel party size is 2.9 people. Six of ten traveled to Tucson by personal car. Most travel parties stay as guests in private homes [58%]. Still, one of four stay in a hotel, RV park or rental – with an average nightly lodging rate of \$165.43. Average ASP attendance among Out-of-Town Attendees is 2.3 years.)
- **Organizational/Event Expenditures** (\$91,900 [or 0.8%] of all direct expenditures, based on figures provided by Many Mouths One Stomach [including organizational expenditures for items such as public safety, parking, event rentals, etc.]

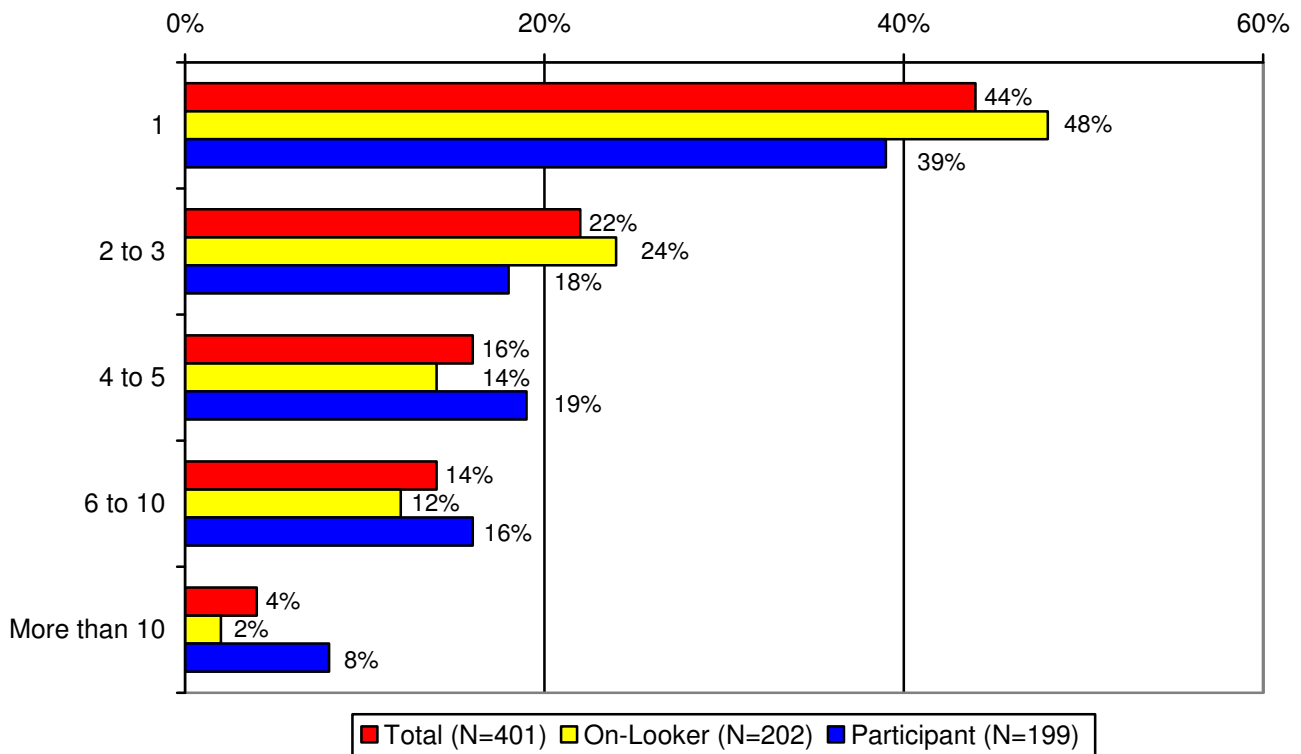


## Details of the Findings

### *Economic/Demographic Profile of Attendees*

**Attendance Characteristics** – The majority of All Souls Procession (ASP) attendees are repeat attendees who have been to the event two or more times (56%). This includes attendees who have been to the ASP 2-to-3 (22%), 4-to-5 (16%), 6-to-10 (14%) or 11+ (4%) times. The remaining 44% are first time attendees – more often On-Lookers (48% versus 39% of Participants) and out-of-town visitors (60% versus 41% of locals). Overall, average attendance is 3.6 years. For On-Lookers, the average is 3.0 years – compared to 4.2 years among Participants.

**Table 1**      **Number of Times Attended the All Souls Procession**



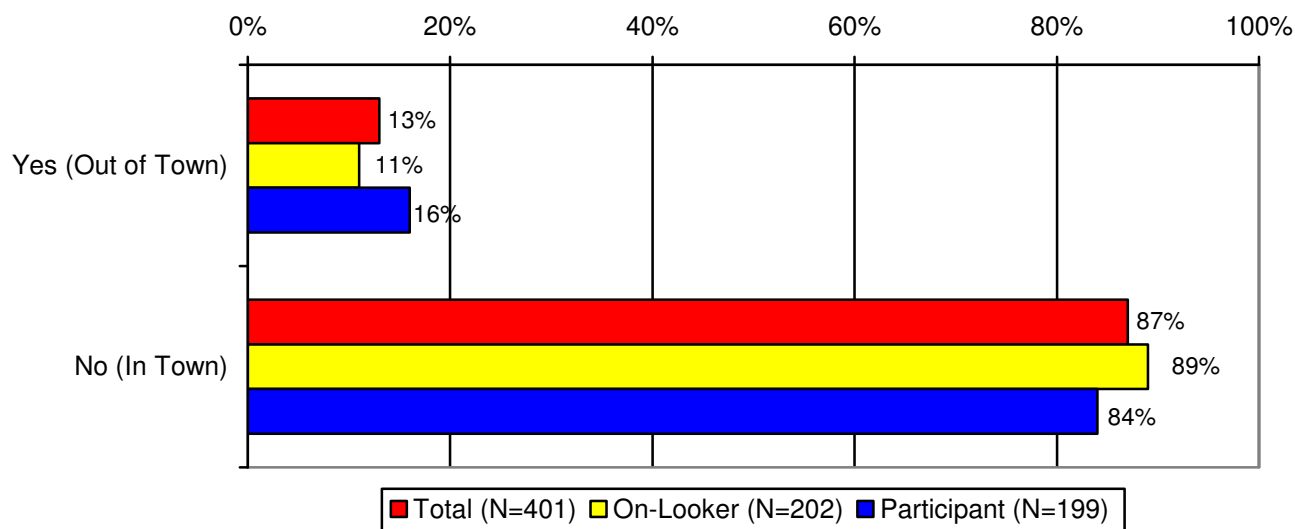
Question:      Including this year, how many times have you attended the All Souls Procession?

**Traveling In From Out of Town** – Overall, 13% of attendees indicate they traveled from outside of Tucson to attend the 2013 All Souls Procession event (Table 2). These out-of-town attendees are somewhat more likely to be ASP Participants (16% versus 11% of On-Lookers) – as well as progressively newer attendees.

These out-of-town attendees typically stay in Tucson for one (28%) or 2-to-3 (31%) days for the event – with an average length of stay of 7.5 days (Table 2a). Still, others remain in Tucson for a longer period of time, including 26% who stay for more than one week. The average length of stay is longer for out-of-town Participants (8.1 days) compared to On-Lookers (6.6 days).

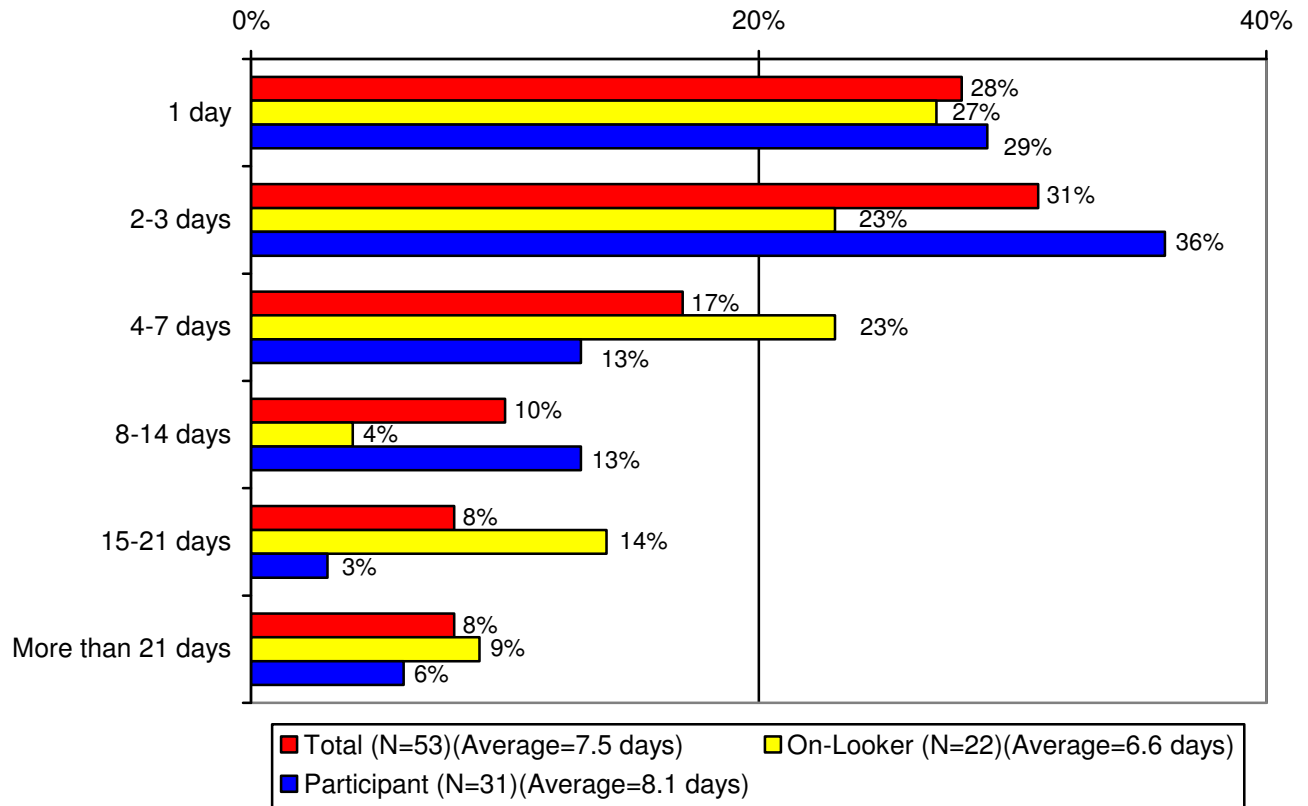
Those few out-of-town attendees (7 respondents overall) who indicate that they stay in Tucson 21 days or longer were asked how important attending the ASP is their decision to visit Tucson. As indicated in Table 2b, more (57%) say the ASP is a “primary” (14%) or “major” (43%) reason for traveling to Tucson rather than a “minor” (43%) one.

**Table 2** Traveling In From Out of Town



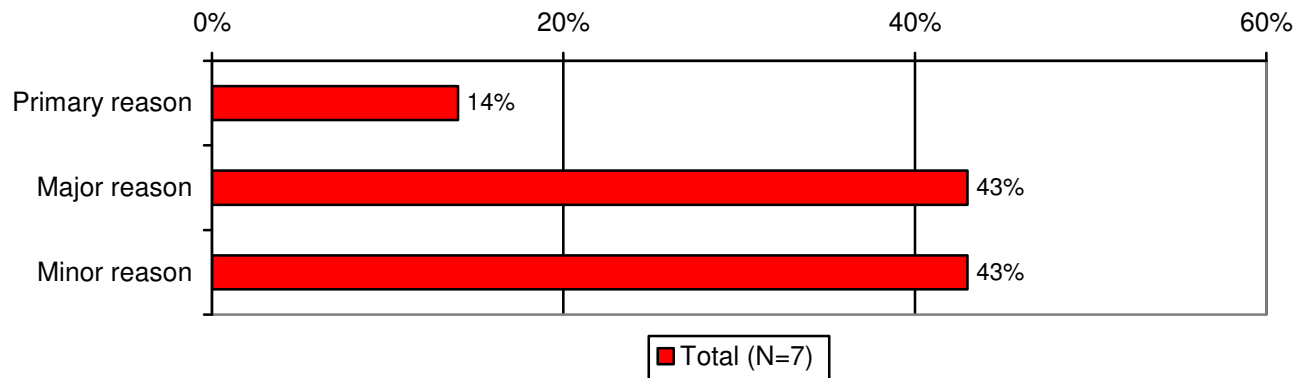
Question: Did you come from out of town for this event?

**Table 2a**      **Number of Days in Tucson for the All Souls Procession**  
 (Among Out-of-Town Attendees)



Question: How many days total will you spend in Tucson while you are here for the All Souls Procession?

**Table 2b**      **Degree to Which All Souls Procession Is Reason for Coming to Tucson**  
 (Among 21+ Day Out-of-Town Attendees)



Question: How important was attending the All Souls Procession in your decision to visit Tucson? Was it your...

**In-Town Attendee Estimated Expenditures** – In-town attendees (both Participants and On-Lookers – 87% of the total sample) were asked to estimate their total expenditures in five categories (ASP-related expenditures to create costumes or floats, food and beverage, entertainment, retail shopping and other) during their attendance of the 2013 All Souls Procession.

Based on the findings summarized in the Table 2c series, the average per category spending of local attendees includes:

<u>Expenditure Category</u>	<u>Average Expenditure</u>		
	<u>Total</u>	<u>On-Looker</u>	<u>Participant</u>
Materials for Costumes/Floats	<b>\$34.21</b>	\$11.56	\$58.33
Food & Beverage	<b>\$32.22</b>	\$30.92	\$33.60
Entertainment	<b>\$6.29</b>	\$4.19	\$8.52
Retail Shopping	<b>\$8.28</b>	\$4.59	\$12.21
Other	<b>\$1.69</b>	\$1.25	\$2.16

Overall, 42% of locals report purchasing materials to create a costume or float – with six of ten spending at least \$25 (for an average expenditure of \$34.21). As might be expected, average spending is higher among Participants (\$58.33) than On-Lookers (\$11.56).

More than six of ten local attendees indicate making a food and beverage purchase while downtown for the ASP event (62%) – with average spending of \$32.22.

Fewer locals report an entertainment (19%) or retail shopping (14%) expenditure. The average retail shopping expenditure is \$8.28 – higher among Participants (\$12.21) as compared to On-Lookers (\$4.59).

**Table 2c**                      **Estimated Expenditures on Food, Shopping and Entertainment During Trip**  
(Among In-Town Attendees)

(N=351)	\$10 or Less	\$11 to \$24	\$25 to \$49	\$50 to \$99	\$100 or More	None/ Don't Know/ Refused
Materials purchased to create costumes, floats or other items for the Procession	21%	20%	18%	21%	21%	58%
Food and beverage purchases	32%	28%	19%	12%	9%	38%
Entertainment, including amusements or attractions	46%	25%	11%	12%	6%	81%
Retail shopping	22%	14%	24%	20%	18%	86%
Other	48%	10%	24%	10%	10%	94%

Question:        During your attendance of the All Souls Procession event this year, how much total would you say you are spending at the event for...

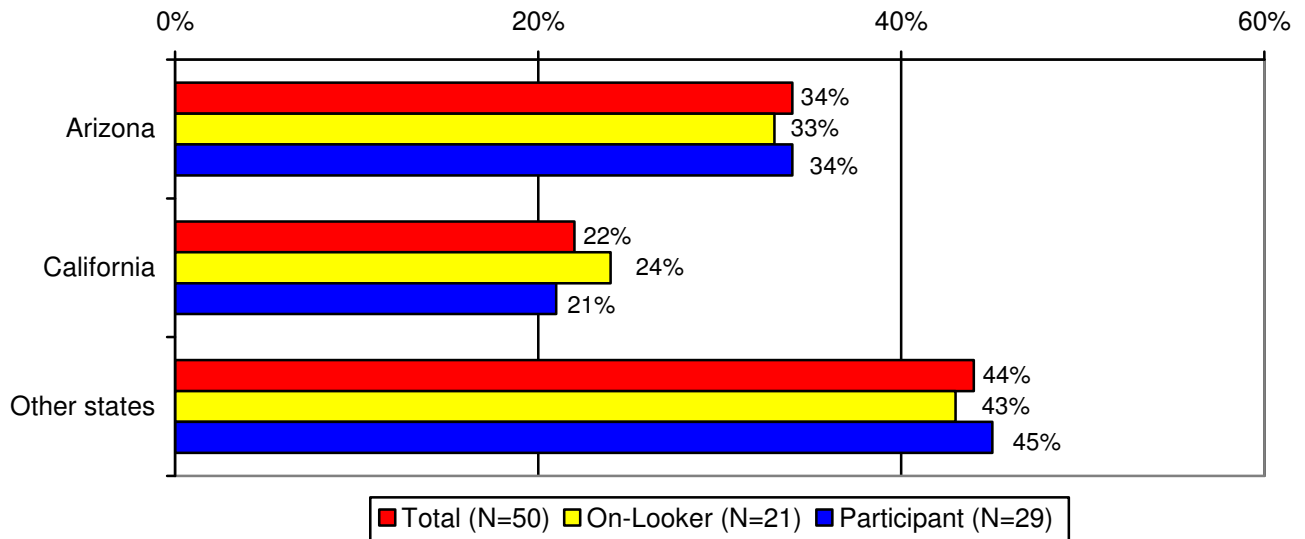
**Home Location of Out-of-Town Attendees** – As summarized in Table 3, out-of-town attendees (13% of the total sample) have traveled to Tucson from 14 different states and two foreign countries to attend the 2013 All Souls Procession.

The largest share of out-of-town attendees have traveled from Arizona (outside of Tucson) (34%) and California (22%) – as well as Washington (8%), New Mexico (6%), Oregon (4%), New York (4%) and Texas (4%). Travel patterns are fairly consistent between out-of-Tucson Participants and On-Lookers. Internationally, two attendees – an On-Looker from Mexico and a Participant from Colombia – were interviewed for this project. Refer to Detailed Table 3 for a complete listing of out-of-town attendee home locations.

Among out-of-area attendees who traveled to Tucson for the ASP event from elsewhere in Arizona (Table 3a), a majority (53%) are from Phoenix (41%) or Bisbee (12%) – with 6% each from Casa Grande, Globe, Green Valley, Nogales, Prescott, Tempe or Yuma.

**Table 3**

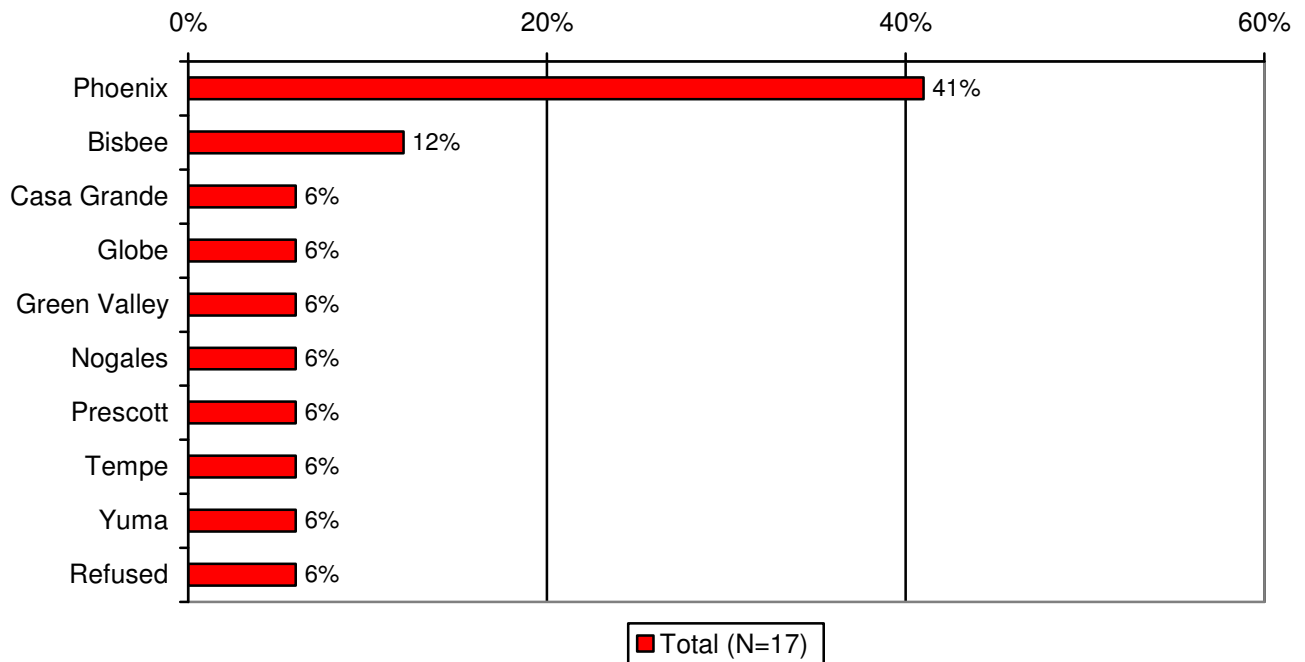
**Home Location**  
(Among Out-of-Town Attendees)



Question: Which state or country have you traveled from to attend the All Souls Procession?

**Table 3a**

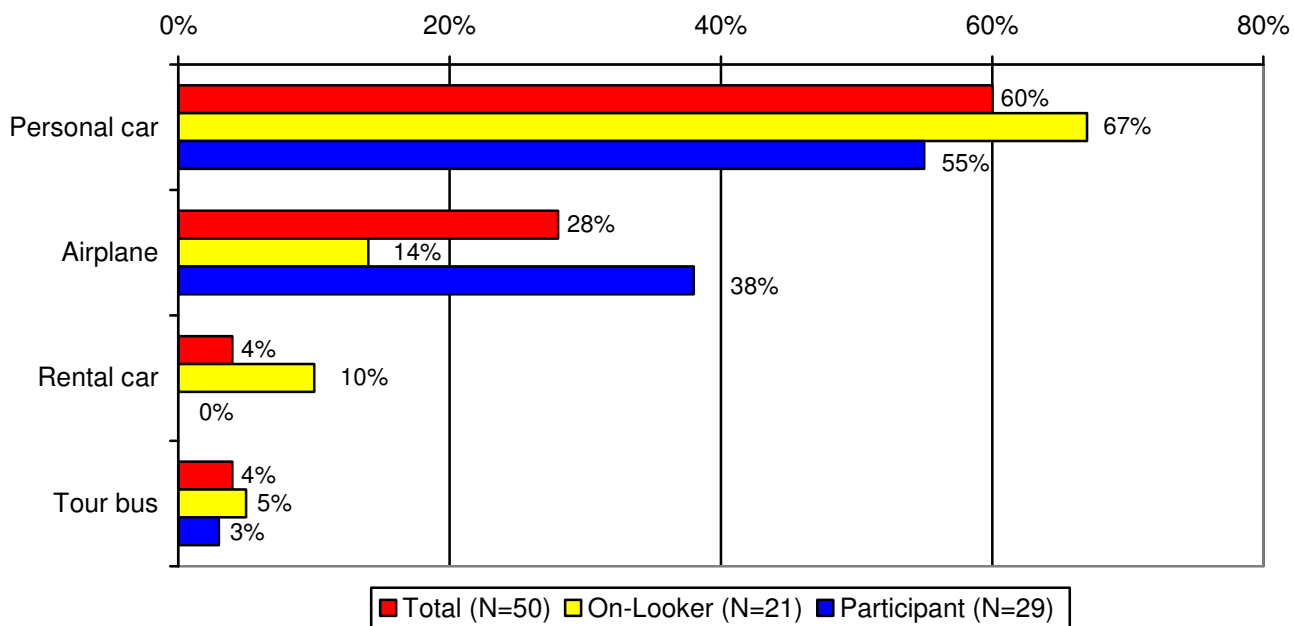
**Home Location in Arizona**  
(Among Out-of-Town Attendees From Arizona)



**Method of Travel To and From Tucson** – Six of ten out-of-town attendees indicate they traveled by personal car to get to and from the 2013 All Souls Procession. Another 4% drove a rental car. Travel by personal or rental car is much higher among out-of-town On-Lookers (77%) than Participants (55%). Among the rest, 28% traveled by airplane – most often Participants (38% versus 14% of On-Lookers). A few others arrived by tour bus (4%).

Among the 28% of out-of-town attendees who traveled to the ASP by airplane, 43% indicate renting a car or van to drive while in Tucson for the event (Table 4a).

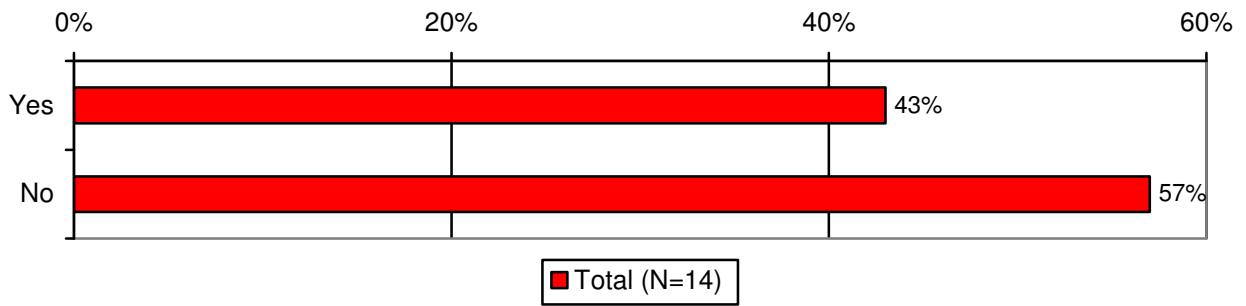
**Table 4** **Method of Travel To and From Tucson**  
(Among Out-of-Town Attendees)



Question: What mode of travel are you using to get to and from the Tucson area? Are you traveling by...

**Table 4a**

**Use of Rental Car**  
(Among Those Who Traveled By Airplane)

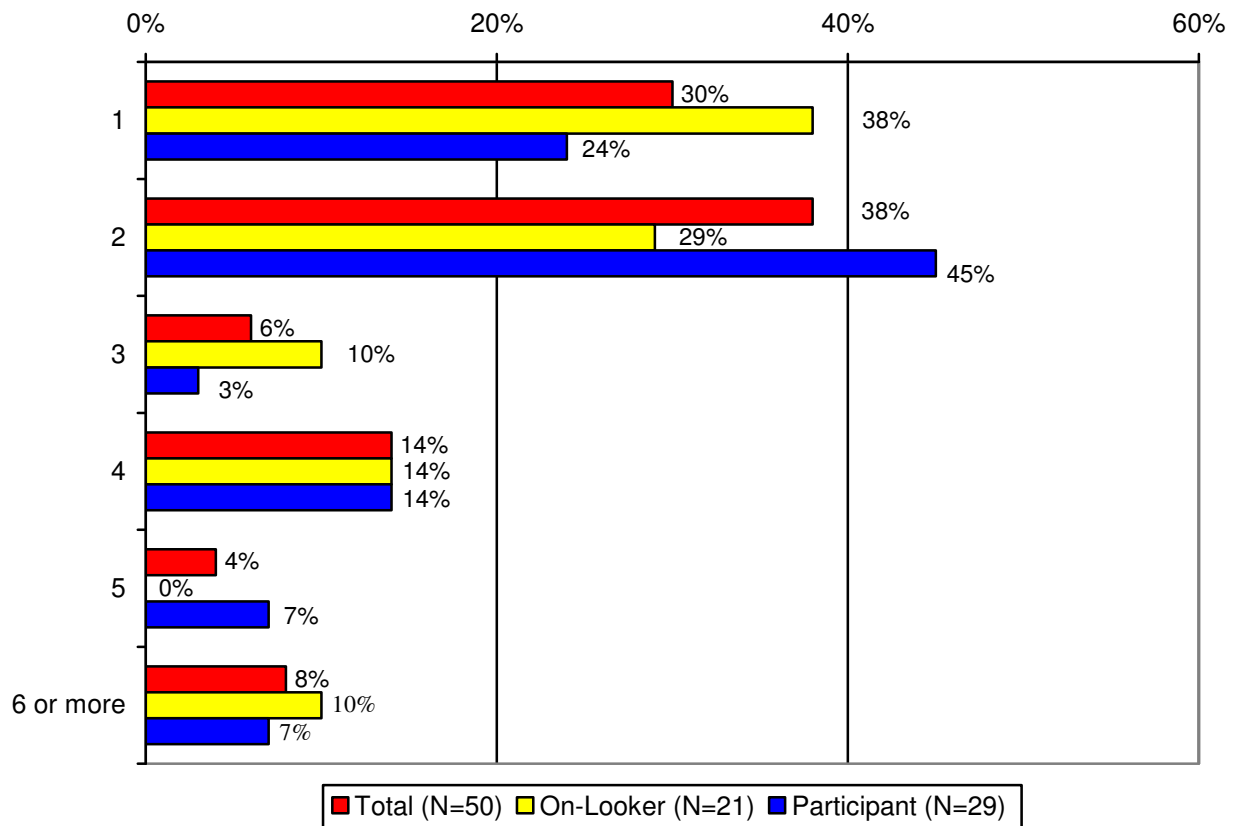


Question: Are you renting a car or van while you are in Tucson for the event?



**Number of People in Travel Party** – Seven of ten out-of-town attendee travel parties include two or more people, including one-third with three or more. Still, the largest share (38%) include two out-of-town travelers – more often Participants (45% versus 29% of On-Lookers). Three of ten out-of-town attendees traveled alone to the 2013 All Souls Procession. The average out-of-town travel party size is 2.9 – regardless of participant status.

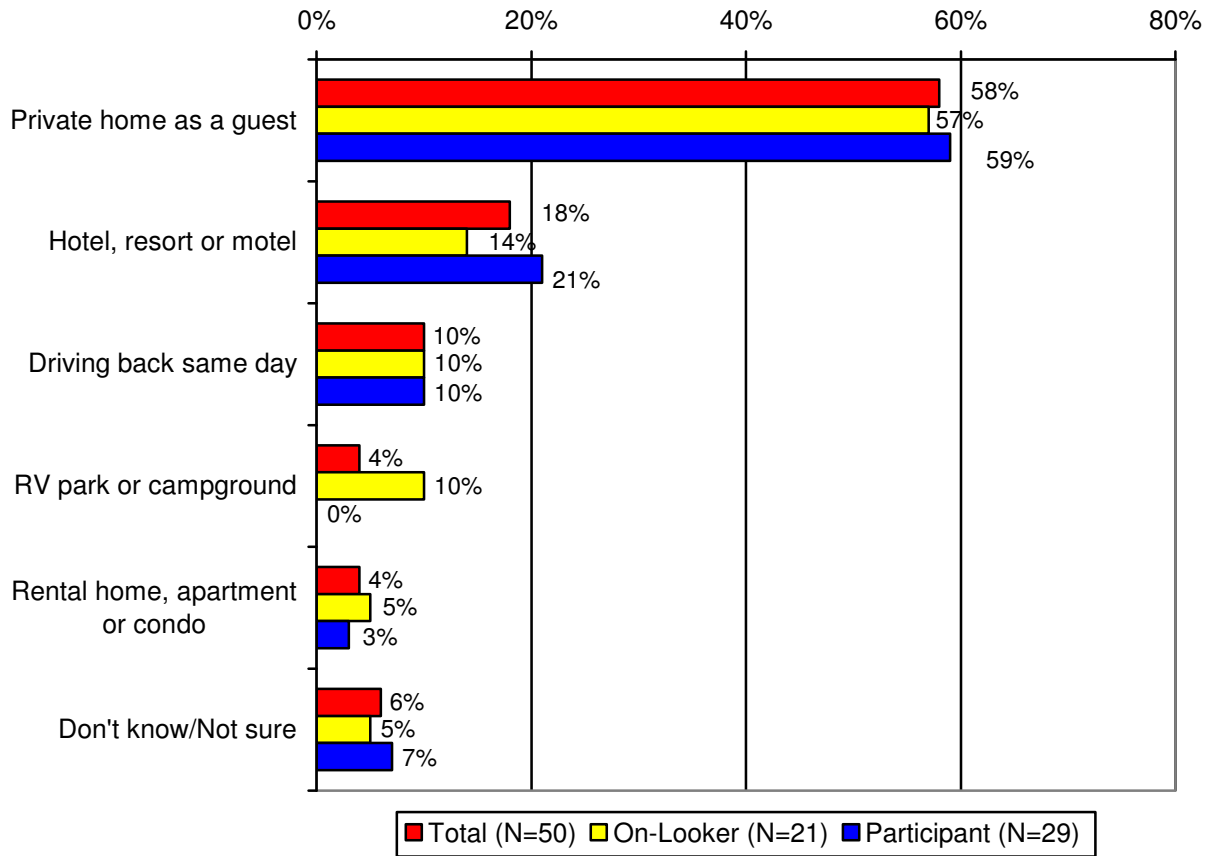
**Table 5** **Number of People in Travel Party**  
(Among Out-of-Town Attendee Travel Parties)



Question: Including yourself, how many people in your travel party did you bring to Tucson?

**Type of Accommodations** – Nearly six of ten out-of-town attendee travel parties (58%) stay in a private home as a guest during their visit to Tucson for the All Souls Procession. Another 18% stay in a hotel, resort or motel – with 4% each who utilize a RV park/campground or rental home/apartment/condominium. One of ten are daytrippers who returned home the same day of the ASP event. Accommodation patterns are generally consistent among out-of-town On-Lookers and Participants.

**Table 6** **Type of Accommodations**  
(Among Out-of-Town Attendee Travel Parties)



Question: During your visit to Tucson for this event, are you staying in...

**Out-of-Town Attendee Travel Party Estimated Daily Expenditures** – Out-of-town attendees (13% of the total sample) were asked to estimate their daily expenditures (including all members of their travel party) in six categories.

Based on the findings summarized in the Table 7 series, average daily per category spending of out-of-town attendee travel parties includes:

<u>Expenditure Category</u>	<u>Average Per Party Daily Expenditure</u>		
	<u>Total</u>	<u>On-Looker</u>	<u>Participant</u>
Lodging	<b>\$47.27</b>	\$30.30	\$58.97
Food & Beverage	<b>\$64.27</b>	\$53.60	\$71.62
Materials for Costumes/Floats	<b>\$11.59</b>	\$12.75	\$10.79
Entertainment	<b>\$16.37</b>	\$15.75	\$16.79
Transportation	<b>\$23.18</b>	\$22.35	\$23.76
Retail Shopping	<b>\$30.73</b>	\$16.35	\$40.66

Three of ten out-of-town attendees indicate a daily lodging expenditure, with a slight majority (54%) spending between \$50 and \$149 per day – for an average daily expenditure of \$47.27. For food and beverages, most (58%) spend under \$100 per day (for average daily spending of \$64.27). Among the one of four who report an expenditure, average spending on materials for costume and float preparation is \$11.59. Six of ten indicate a daily transportation expenditure, typically under \$50 per day (for average daily spending of \$23.18). Fewer out-of-town attendees report entertainment (28%) or retail shopping expenditures (42%).

In three of the six categories, daily average spending is higher among Participants than On-Lookers. In the remaining categories – costume/float materials, entertainment and transportation – average daily travel party expenditures are about equal.

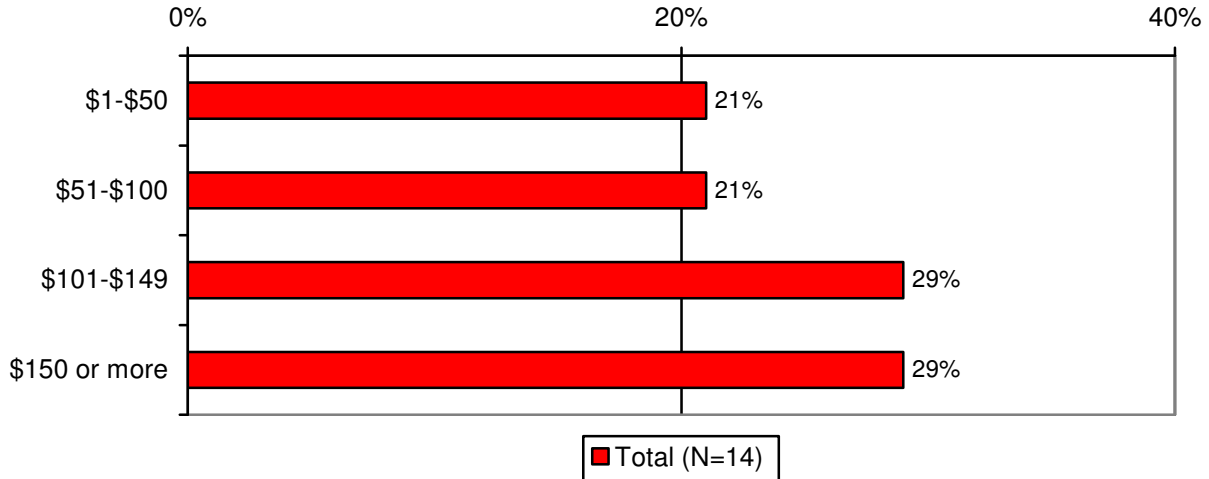
**Table 7**      **Estimated Expenditures on Various Travel-Related Items**  
 (Among Out-of-Town Attendee Travel Parties)

(N=50)	\$1 to \$49	\$50 to \$99	\$100 to \$149	\$150 to \$199	\$200 or More	None/Does Not Apply/ Refused
Lodging	0%	27%	27%	7%	40%	70%
Food and beverage purchases	30%	28%	20%	8%	15%	20%
Materials purchased to create costumes, floats or other items for the Procession	62%	23%	15%	0%	0%	74%
Entertainment, including amusements, attractions and recreation fees	50%	14%	21%	7%	7%	72%
Daily transportation including gas, taxi, limo, van service and public transportation, including car rental	71%	16%	10%	0%	3%	38%
Retail shopping	57%	10%	24%	0%	10%	58%

Question:      Now I'd like to ask you about your estimated expenditures during your stay in Tucson for the All Souls Procession. Including all members of your travel party, how much are you spending each day on...

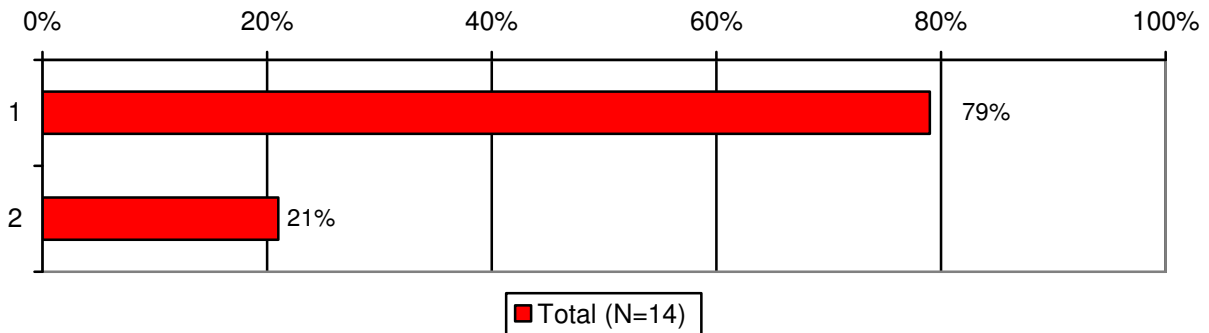
**Out-of-Town Attendee Travel Party Lodging Characteristics** – The average lodging rate per night among out-of-town attendee travel parties is \$165.43, including one-half who report spending between \$51 and \$149 nightly (Table 7a). Eight of ten report renting one room during their stay in Tucson for the All Souls Procession (Table 7c). The balance (21%) rent two rooms.

**Table 7a** Lodging Rate Per Night  
(Among Out-of-Town Attendee Travel Parties)



Question: Room rate/night paid?

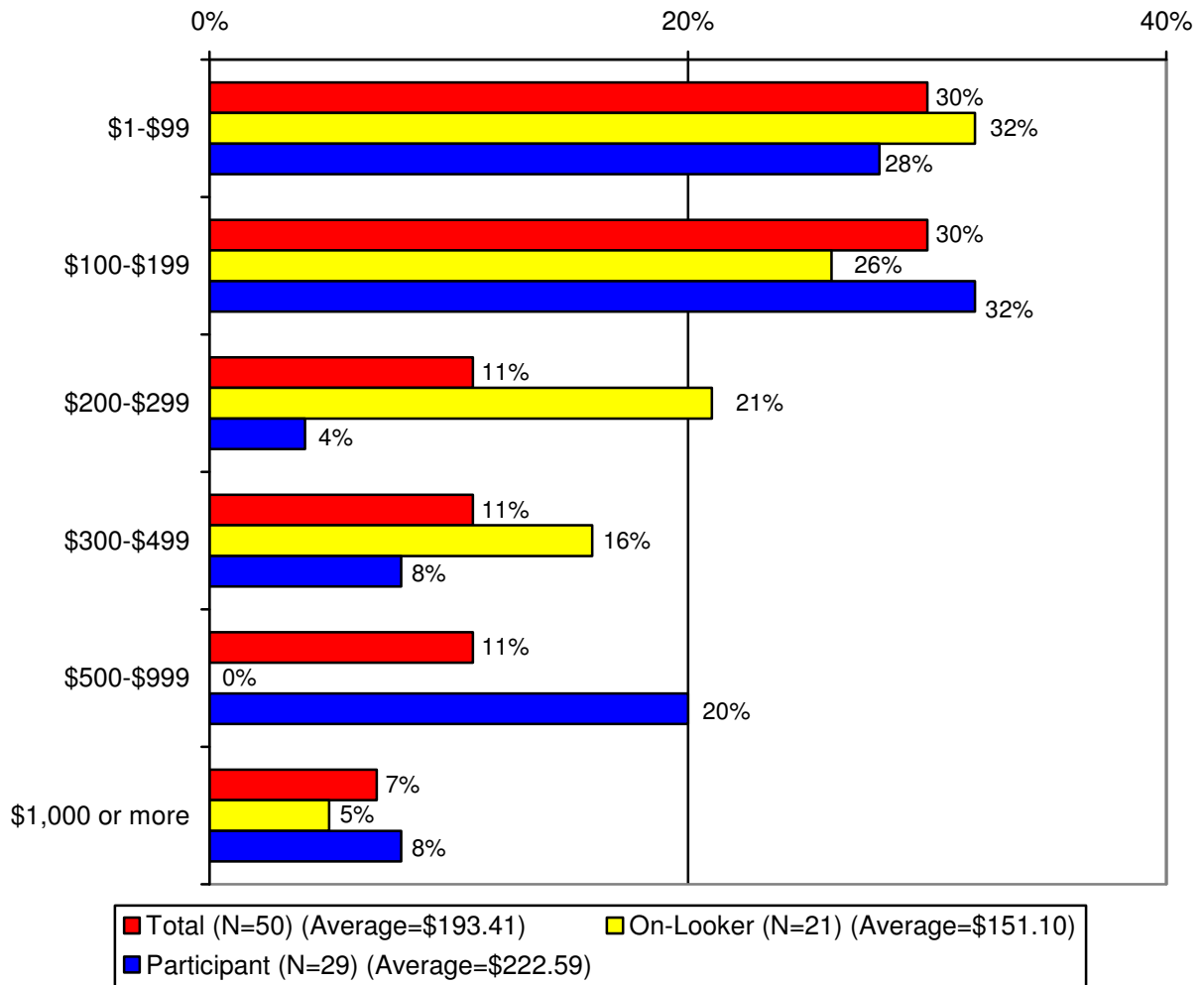
**Table 7b** Number of Rooms Rented  
(Among Out-of-Town Attendee Travel Parties)



Question: Number of rooms at that rate?

**Out-of-Town Attendee Travel Party Daily Expenditure Totals** – Average daily spending among out-of-town All Souls Procession attendee travel parties is \$193.41. This is based on the sum of the six daily expenditure categories (for each individual travel party) included in Table 7. Four of ten have daily expenditures of \$200 or more. Average daily spending is higher among Participants (\$222.59) than On-Lookers (\$151.10).

**Table 7c** **Expenditures Per Day**  
(Among Out-of-Town Attendee Travel Parties)



**Out-of-Town Attendee Travel Party Trip Expenditure Totals** – For each out-of-town ASP attendee travel party, the expenditures per day estimate (Table 7c) is multiplied (on a per-case basis) by the number of days spent in Tucson (Table 2a) to yield the total party trip expenditure.

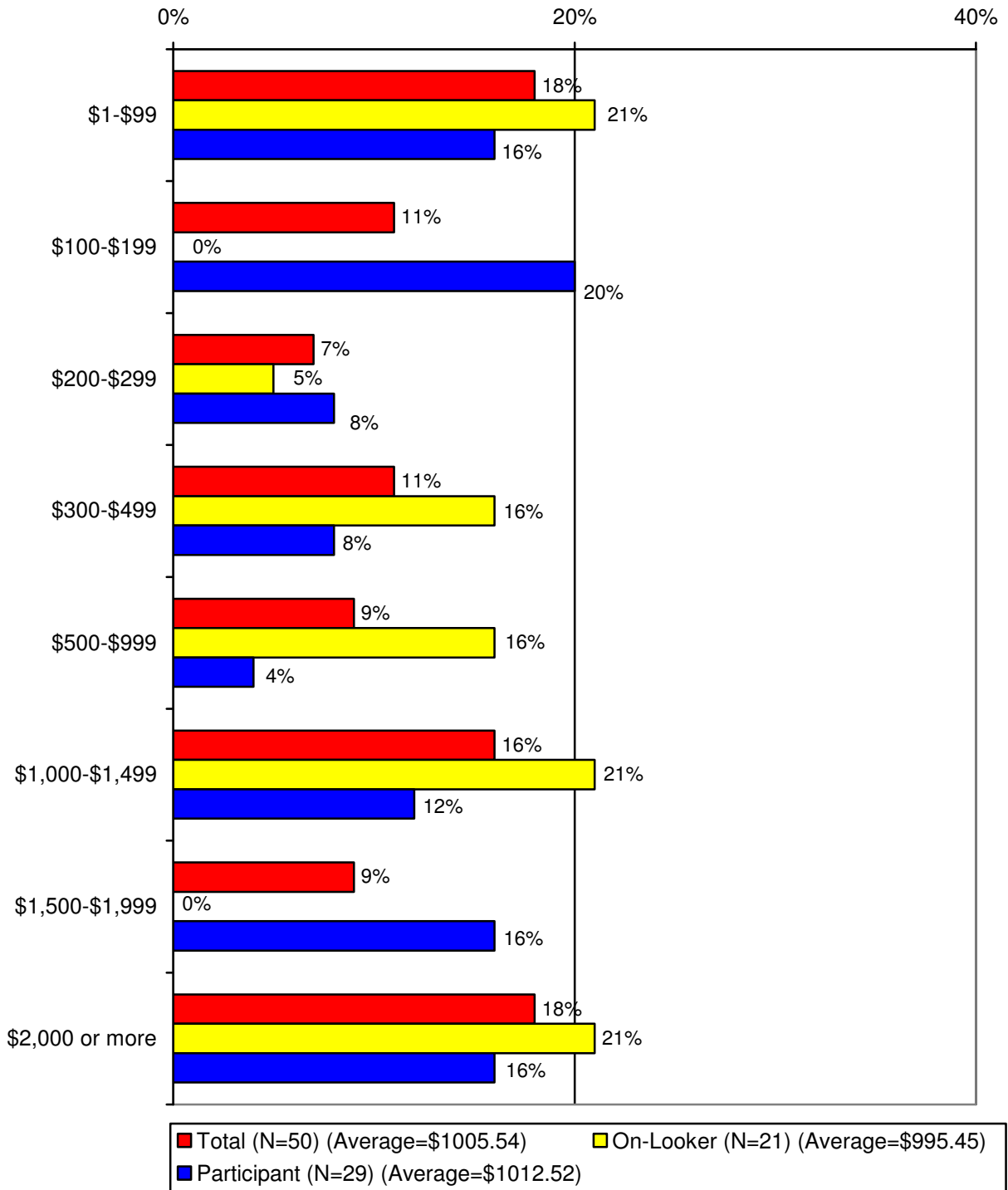
As indicated in Table 7d, the average total trip expenditure is \$1,005.54 for each travel party of out-of-town attendees. A slight majority (52%) have total trip expenditures of \$500 or more. Average travel party trip spending is about equal between Participants (\$1,012.52) and On-Lookers (\$995.45).

Average per category trip spending of out-of-town attendee travel parties includes:

<u>Expenditure Category</u>	<u>Average Per Party Total Trip Expenditure</u>		
	<u>Total</u>	<u>On-Looker</u>	<u>Participant</u>
Lodging	<b>\$220.12</b>	\$290.40	\$171.66
Food & Beverage	<b>\$348.63</b>	\$369.10	\$334.52
Materials for Costumes/Floats	<b>\$76.45</b>	\$88.50	\$68.14
Entertainment	<b>\$102.06</b>	\$75.25	\$120.54
Transportation	<b>\$103.04</b>	\$74.10	\$123.00
Retail Shopping	<b>\$155.24</b>	\$98.10	\$194.66

**Table 7d**

**Expenditures For Trip**  
(Among Out-of-Town Attendee Travel Parties)



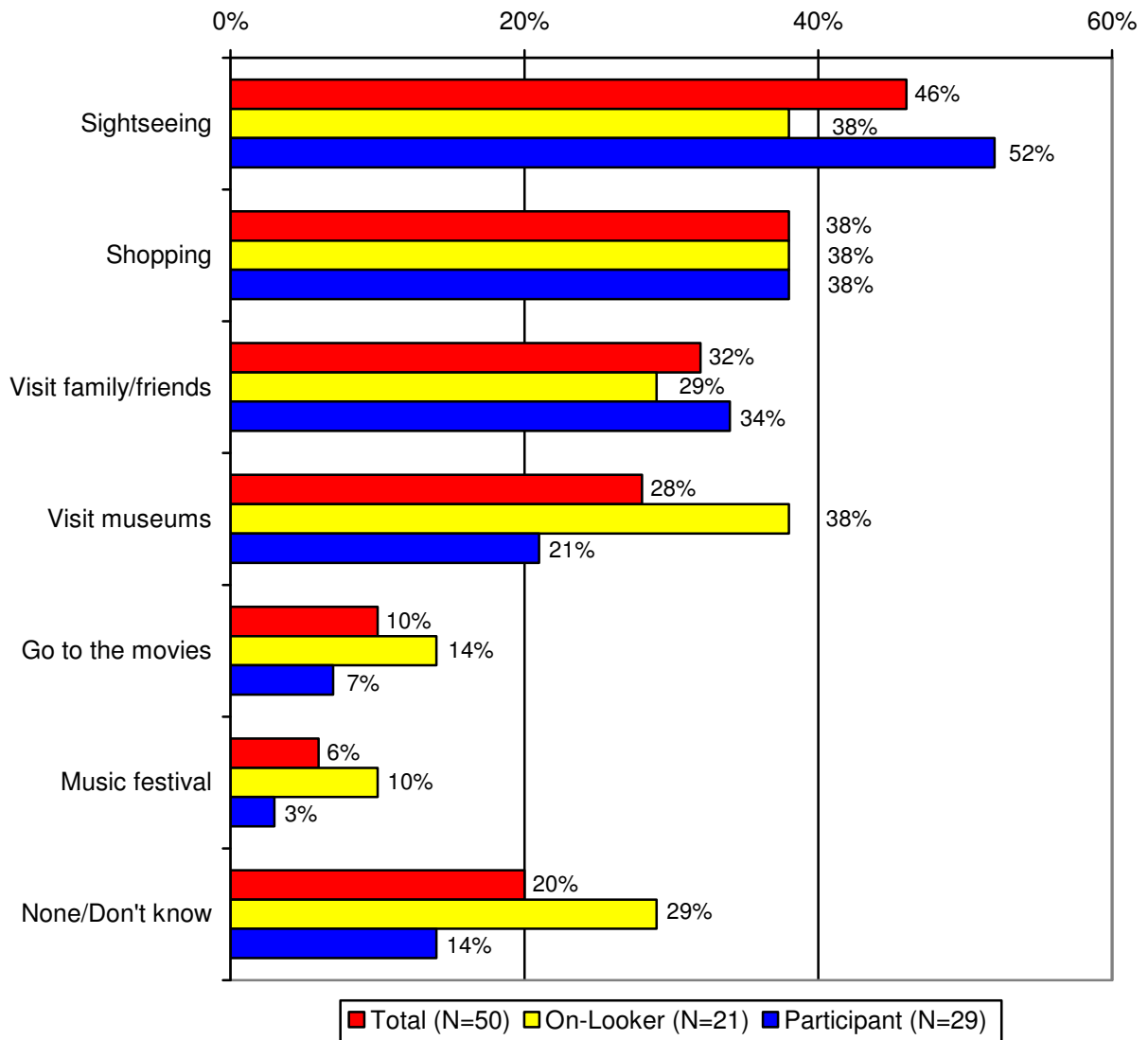


**Other Activities Engaged in While in Tucson** – Eight of ten out-of-town attendees say they have participated in activities (besides the All Souls Procession) during their stay in Tucson. This is especially true among Participants (86% versus 71% of On-Lookers). The most popular activities include:

- **Sightseeing** (46%, particularly Participants and men.)
- **Shopping** (38%, more often women.)
- **Visiting family/Friends** (32%, especially men and first-year attendees.)
- **Visiting museums** (28%, more often On-Lookers, men and first-year attendees.)
- **Go to the movies** (10%)
- **Attend a music festival** (6%)

**Table 8**

**Other Activities While in Tucson**  
(Among Out-of-Town Attendees)

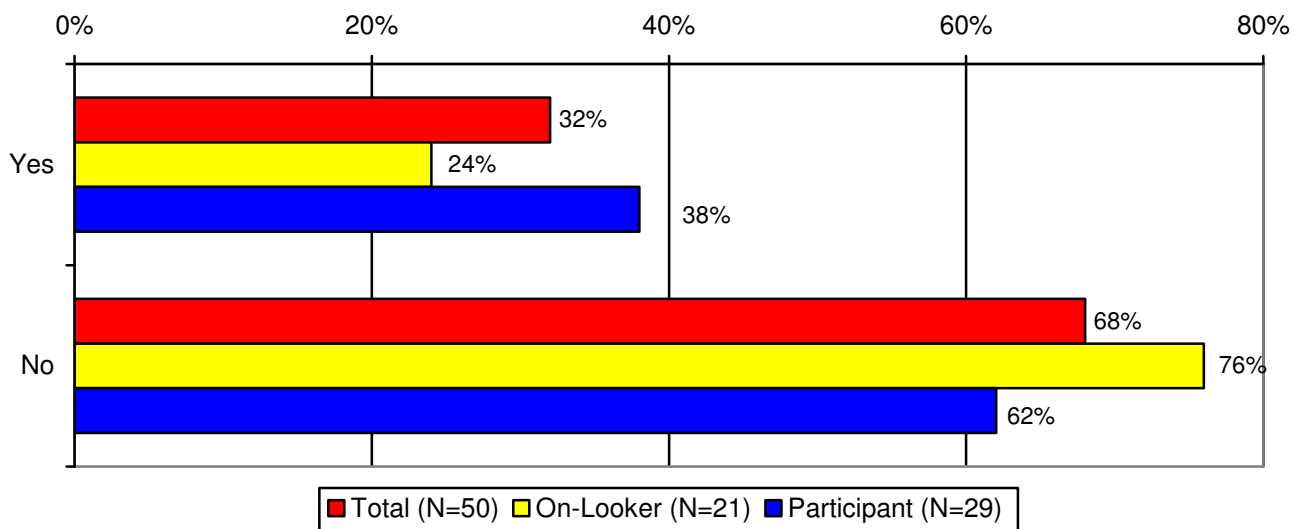


Question: During your stay in Tucson for the All Souls Procession, what other types of activities, if any, have you done?

**Visitation of Other Destinations** – One-third of out-of-town attendees say they have or will visit other destinations in Arizona while in Tucson to attend the All Souls Procession. These tend to be Participants (38% versus 24% of On-Lookers) and first-year attendees (Table 9).

As indicated in Table 9a, among these out-of-town attendees who have or will visit another locale, the most popular side trip is to Phoenix (27%). Among the rest, various locations are mentioned, including Bisbee, Madera Canyon, Arcosanti, Sedona, the Grand Canyon, the Sonoran Desert, Benson and Tubac.

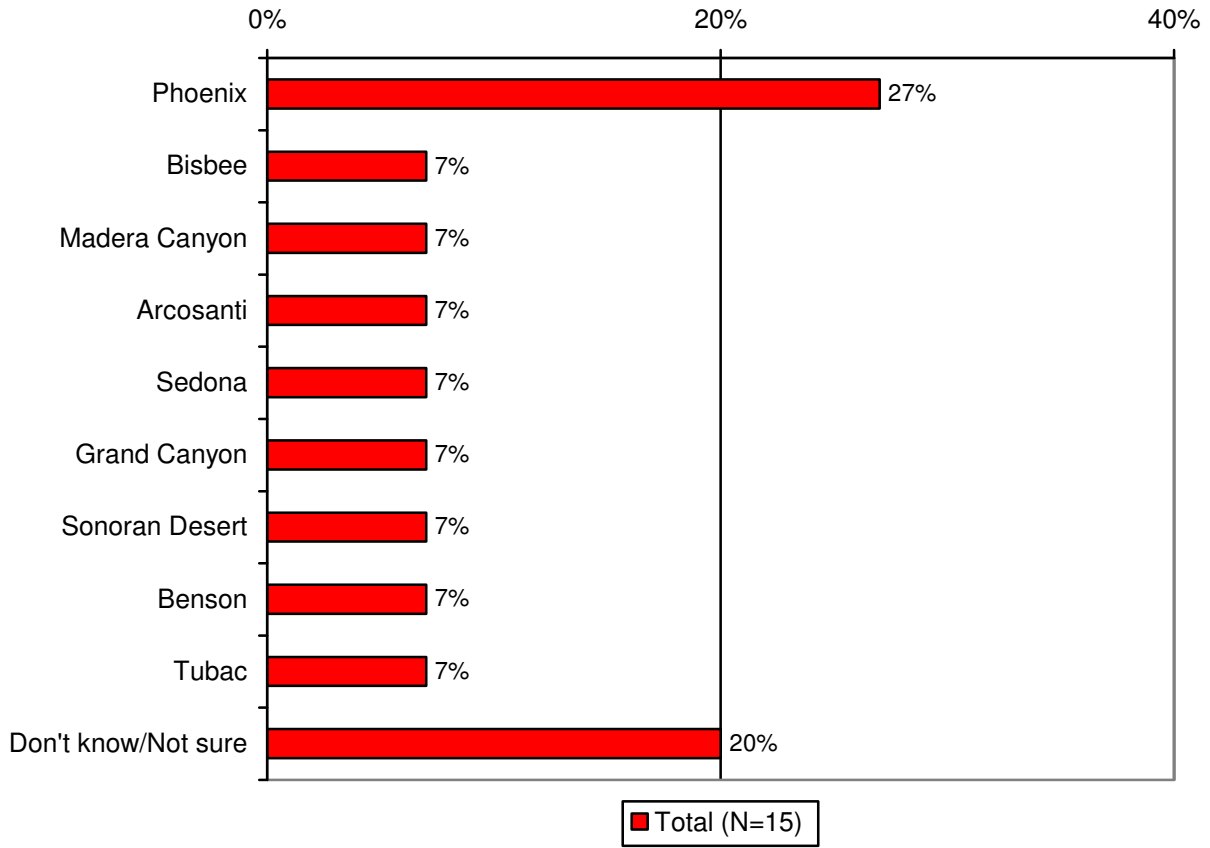
**Table 9** Visitation of Other Destinations  
(While Attending the All Souls Procession)



Question: Have you or will you visit any other destinations in Arizona (in addition to Tucson) while you are here for this year's All Souls Procession?

**Table 9a**

**Other Destinations Visited**  
(Among Out-of-Town Attendees)

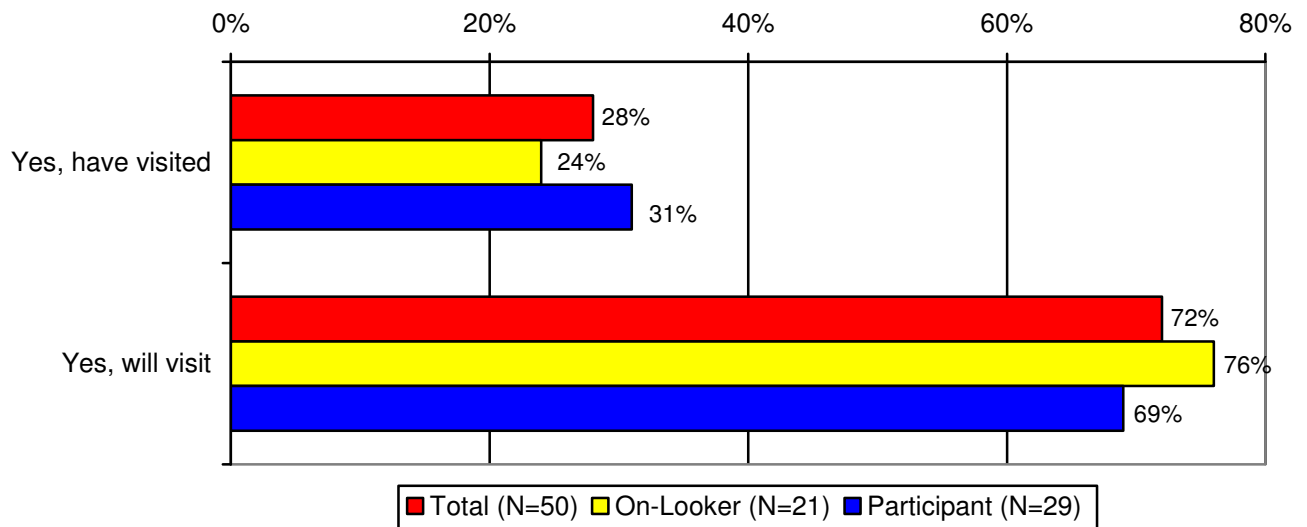


Question: Where?

**Likelihood of Returning to Tucson Not Related to the All Souls Procession – Fully 100% of out-of-town attendees say they will return to Tucson as a visitor, not related to the All Souls Procession.** Of these, 28% say they have already traveled to Tucson as a visitor – while the remaining 72% say they will visit at some time in the future (Table 10). Participants are more apt to have visited before (31% versus 24% of On-Lookers).

Among the 28% of out-of-town attendees who have visited Tucson before, one-half stayed for a week or less (49%), including single-day (8%), two-day (33%) and four-day (8%) stays (Table 10a). One-third do not recall how long they stayed (33%), with the rest spending two to three weeks in Tucson (16%).

**Table 10** Likelihood of Returning to Tucson Not Related to the All Souls Procession  
(Among Out-of-Town Attendees)

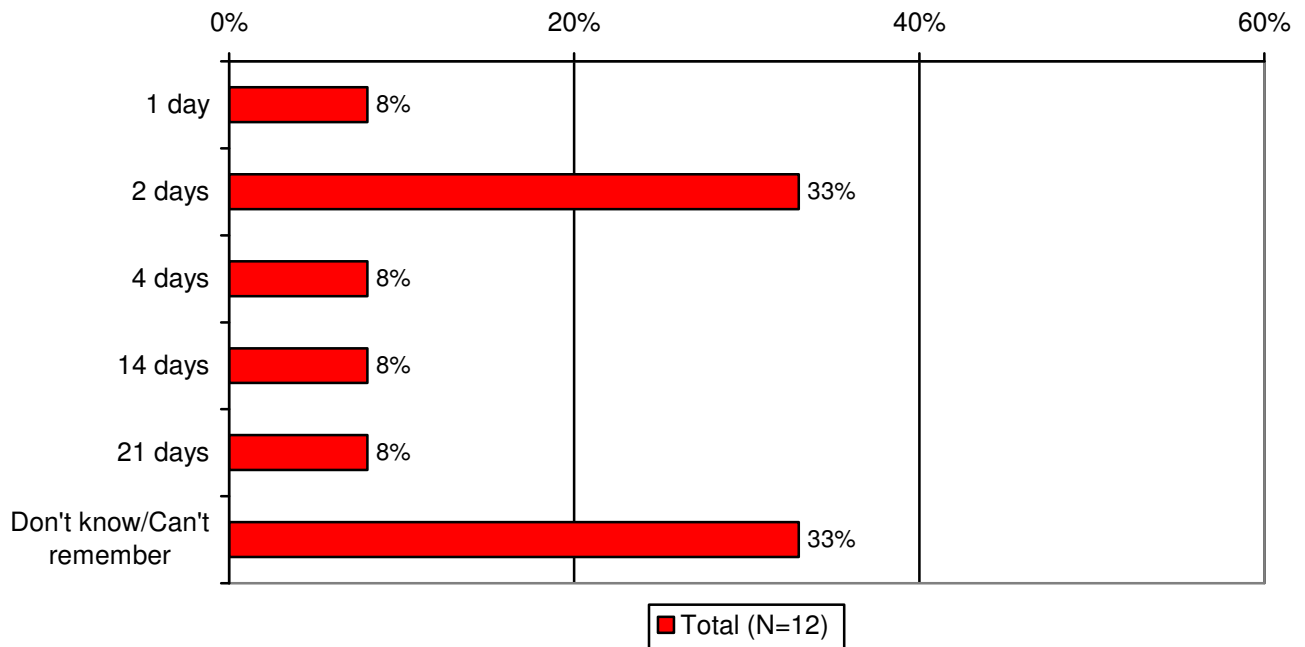


Question: Have you or will you likely return to Tucson as a visitor, not related to the All Souls Procession?

**Table 10a**

**Previous Visit Duration**

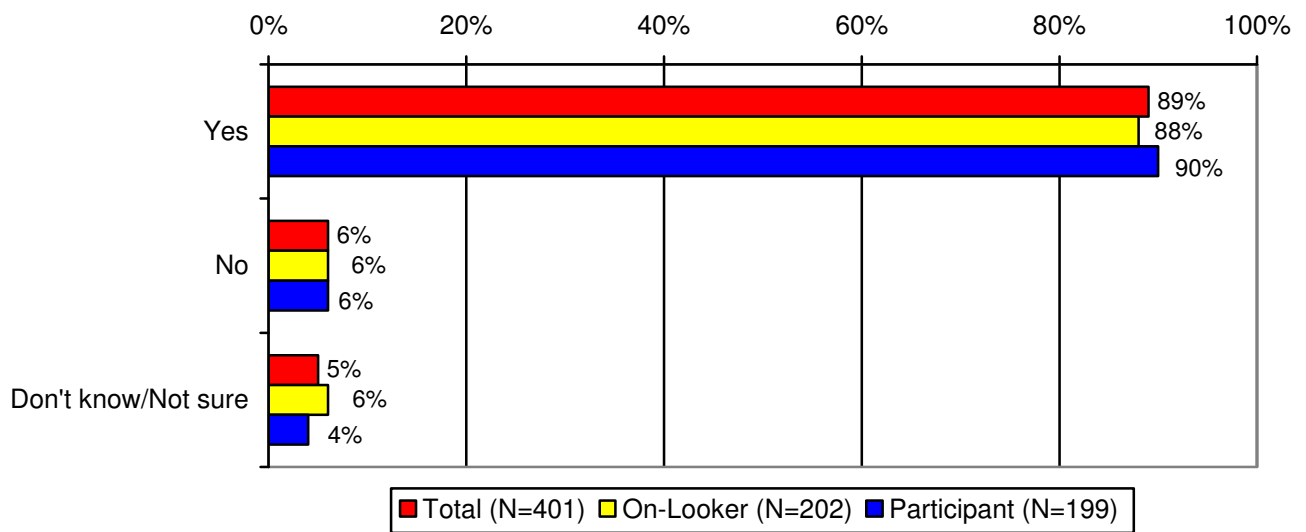
(Among Out-of-Town Attendees Who Have Visited Tucson Before)



Question: How many days have you visited before?

**Positive Impact of All Souls Procession on Sense of Belonging in Tucson –** When both local and out-of-town attendees were asked if the All Souls Procession has a positive impact on their sense of belonging in Tucson, fully nine of ten say “yes” (89%), including a similar share of On-Lookers and Participants. Just 6% say “no,” with the remaining 5% “not sure” of the All Souls Procession’s impact. Those who have attended 2 or more All Souls Processions are even more apt to agree (94% versus 83% of first-year attendees). In addition, 94% of attendees who plan to return next year for the ASP event indicate a positive impact on their sense of belonging in Tucson.

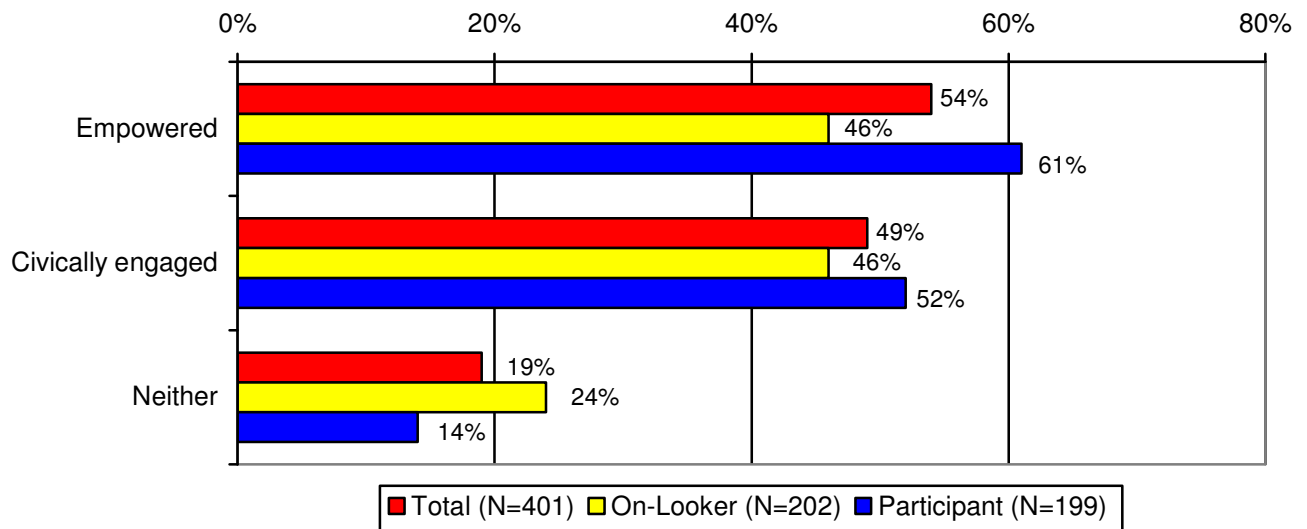
**Table 11** Positive Impact of All Souls Procession on Sense of Belonging in Tucson



Question: Does the All Souls Procession have a positive impact on your sense of belonging in Tucson?

**Changes in Self-Perception Due to All Souls Procession** – All attendees (regardless of home location) were also asked if the All Souls Procession made them feel empowered and/or civically engaged. A majority say the All Souls Procession made them feel **empowered** (54%), particularly Participants (61% versus 46% of On-Lookers) and those who have attended progressively more Processions. One-half of ASP attendees also indicate they felt **civically engaged** (49%), including a few more Participants (52%) than On-Lookers (46%). Those who have attended six or more All Souls Processions were more apt to feel civically engaged (54% versus 47% of five or fewer year attendees). Just 19% indicate they felt **neither** empowered nor civically engaged by the All Souls Procession, more often On-Lookers (24% versus 14% of Participants), out-of-towners (30% versus 17% of locals) and attendees progressively newer to the All Souls Procession.

**Table 12**      **Changes in Self-Perception Due to All Souls Procession**

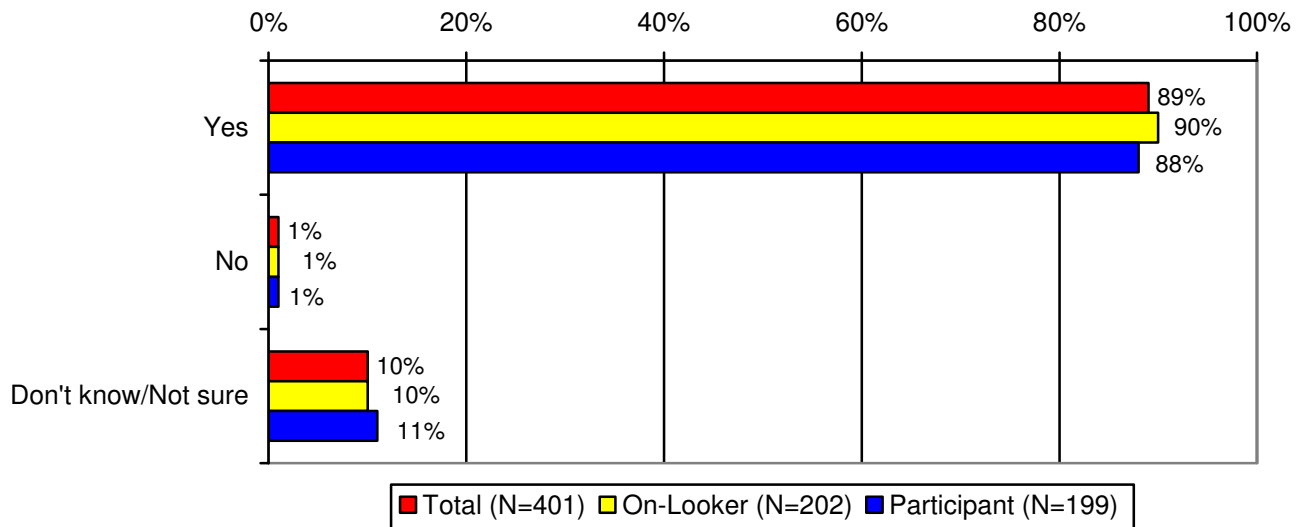


Question:      As a result of your experience at the All Souls Procession, do you feel...



**Intention to Return for All Souls Procession Next Year** – Fully nine of ten 2013 attendees say they will return for the All Souls Procession next year (89%), regardless of On-Looker or Participant status. Nearly all the rest are not sure (10%); with only 1% of 2013 attendees who say they will *not* return in 2014. Among out-of-town attendees, seven of ten say they will return for the 2014 event, while the other three of ten are not sure. This compares to 92% of locals who plan to attend next year’s event. What about first-time ASP attendees in 2013? More than eight of ten will return in 2014 (83% versus 94% of 2+ year past attendees).

**Table 13**      **Intention to Return for All Souls Procession Next Year**



Question: Will you return to the All Souls Procession next year?

## ***Economic Impact of the 2013 All Souls Procession***

**Overview** – Economic impact analysis involves applying a final demand change to a predictive economic input-output model, and then analyzing the resulting changes in the economy. To estimate the effect that the 2013 All Souls Procession has on the economy of Pima County, an input-output model of Pima County was utilized. The software used to construct the model was IMPLAN (Impacts for Planning).

IMPLAN was originally developed at the University of Minnesota and is currently maintained by a private firm based in Huntersville, North Carolina. IMPLAN employs an industrial classification scheme that categorizes Pima County's economy into 440 sectors, including manufacturing and service-oriented sectors. Such a scheme allows categorization according to the type of products or services produced. IMPLAN's sectoring scheme is based on the Federal government's NAICS (North American Industry Classification System).

The IMPLAN model estimates three categories of economic impacts, known as **direct**, **indirect** and **induced** effects. These impacts can be defined as follows:

- **Direct Effects** – These are the changes in demand that are applied to the model. The direct effects are the actual expenditures measured in this study, such as the amount of money spent on lodging, food and beverage, retail shopping, etc. among ASP attendees (along with the various organizational/event expenditures). These dollars spent accrue directly to local firms.

IMPLAN's predictive model consists of **multipliers**, which describe the response of the economy to a change in demand. These effects are estimated as indirect and induced effects, as defined below:

- **Indirect Effects** – These are the sales, income, employment, employee compensation and value-added dollars that result from other local firms selling to those firms who are direct beneficiaries of ASP-related expenditures.
- **Induced Effects** – These are the sales, income, employment, compensation and value-added created as workers in firms in the above two categories spend their wages in Pima County.

The direct impacts (or expenditures) of the 2013 All Souls Procession (as summarized in the main report, Tables 1 to 7d) for three specific components – In-Town Attendees, Out-of-Town Travel Parties and Organizational/Event Expenditures – were aggregated and input into the IMPLAN model. Each direct impact was assigned proportionately to IMPLAN economic sector codes. The software model then estimated the indirect and induced impacts, utilizing the most current econometric data set for Pima County (2011). The results of this analysis are summarized in the following displays.

**Attendance Estimates** – All the economic impact modeling in this report are projected from attendance estimates provided to us. As indicated in Display 1, Many Mouths One Stomach estimates the attendance of the 2013 All Souls Procession to be 100,000. Subsequently, In-Town Attendees are estimated at 87,500 (or 87.5% of the total) and Out-of-Town Attendees are estimated at 12,500 (or 12.5% of the total). These In-Town/Out-of-Town Attendee estimates are based on the findings of the study – specifically Tables 2, 2a and 2b – as explained below.

Among the final in-tab sample of 401 attendees, 53 (13.2%) indicate they traveled from out of town to attend the 2013 All Souls Procession (Table 2). Of these 53 out-of-town attendees, seven indicated length of stays in Tucson of 21 days or more (Table 2a). These seven were asked how important attendance at the ASP was to their decision to visit Tucson (Table 2b). The four who answered “primary” or “major” reason are counted as Out-of-Town attendees for purposes of this study; while the three who answered “minor reason” are counted as In-Town attendees. As a result, the adjusted attendance mix (for purposes of the economic impact analysis) includes 50 Out-of-Town attendees (or 12.5%) and 351 In-Town Attendees (or 87.5%). Why is this done? Primarily to avoid skewing the economic analysis by excluding the impacts of long-term visitors who attend the All Souls Procession but do not consider it a major reason for their visit to Tucson.

The estimate of 12,500 Out-of-Town Attendees is divided by the 2.9 average travel party size (derived from Table 2a) to yield unique Out-of-Town Travel Parties of 4,310 – which is used for purposes of the economic impact analysis. For what reason? The questions related to out-of-town expenditures (as summarized in Tables 7, 7c and 7d) include *all* members of the travel party (and not individual expenditures).

### Display 1            2013 All Souls Procession Attendance Estimates

<p>FMR Final In-Tab Sample: <b>N=401</b></p> <p><u>2013 All Souls Procession Attendance Estimate: 100,000</u><sup>(1)</sup></p> <p><u>In-Town Attendees Estimate: 87,500</u> (87.5% of 100,000)<sup>(2)</sup></p> <p><u>Out-of-Town Attendees Estimate: 12,500</u> (12.5% of 100,000)<sup>(2)</sup></p> <p><u>Unique Out-of-Town Travel Parties Estimate: 4,310</u> (12,500/2.9 average travel party size)<sup>(3)</sup></p>
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(1) Source: Many Mouths One Stomach, KGUN 9 and official estimate from 2012 ASP event by Tucson Police Department (as official estimate from 2013 ASP not released to-date).

(2) From Table 2, 2a and 2b results.

(3) From Table 2a results.

**Direct Impacts** – The direct impacts (expenditures) of the 2013 All Souls Procession are summarized by key component in Display 2-1 (In-Town Attendees), Display 2-2 (Out-of-Town Travel Parties) and Display 2-3 (ASP Event Organizers). Display 3 is a summary by category including the combined total direct impacts of the three components.

As indicated in Display 3, we estimate a total of \$11,661,152 in direct impacts resulting from the 2013 All Souls Procession.

The largest dollar amount is related to food/beverage (\$4,321,845) – followed by costume/float materials (\$3,322,875) and retail shopping (\$1,393,584). In terms of the three economic components connected to the All Souls Procession, the largest percentage of direct impacts (62.0% or \$7,235,375) are attributed to In-Town Attendees. Another 37.2% (or \$4,333,877) are attributed to Out-of-Town Travel Parties, while the balance (0.8% or \$91,900) is associated with Organizational/Event Expenditures.

**Display 2-1                      2013 All Souls Procession Estimated Direct Impact/Expenditure Summary**

***In-Town Attendees***  
(Estimated at 87,500)

<b>Direct Expenditure Category</b>	<b>Average Expenditure*</b>	<b>Estimated Direct Expenditures</b>
<b>Costume/Float Materials</b>	\$34.21	\$2,993,375
<b>Food/Beverage</b>	\$32.22	\$2,819,250
<b>Entertainment</b>	\$6.29	\$550,375
<b>Retail Shopping</b>	\$8.28	\$724,500
<b>Other</b>	\$1.69	\$147,875
<b>TOTAL</b>	<b>\$82.69</b>	<b>\$7,235,375</b>

\* From Table 2c results.

**Display 2-2**

**2013 All Souls Procession Estimated Direct Impact/Expenditure Summary**

***Out-of-Town Travel Parties***

(Estimated at 4,310)

<b>Direct Expenditure Category</b>	<b>Average Trip Expenditure*</b>	<b>Estimated Direct Expenditures</b>
<b>Lodging</b>	\$220.12	\$948,717
<b>Food/Beverage</b>	\$348.63	\$1,502,595
<b>Costume/Float Materials</b>	\$76.45	\$329,500
<b>Entertainment</b>	\$102.06	\$439,879
<b>Transportation</b>	\$103.04	\$444,102
<b>Retail Shopping</b>	\$155.24	\$669,084
<b>TOTAL</b>	<b>\$1,005.54</b>	<b>\$4,333,877</b>

\* From Table 7d results.

**Display 2-3**

**2013 All Souls Procession Estimated Direct Impact/Expenditure Summary**

***Organizational/Event Expenditures\****

<b>Direct Expenditure Category</b>	<b>Estimated Direct Expenditures</b>
<b>Public Safety</b> (Department of Public Safety, Tucson Police Department)	\$11,600
<b>Rentals</b> (Barricades, Fencing, Port-a-Potties, Stage Rentals, Technician Fees, Permits/Space Usage Fees)	\$36,300
<b>City of Tucson Parking Fees</b>	\$35,000
<b>Insurance</b>	\$3,000
<b>Director Stipends</b>	\$3,000
<b>Workshop Materials</b>	\$3,000
<b>TOTAL</b>	<b>\$91,900</b>

\* Provided to FMR by Many Mouths One Stomach. These expenditures were input directly into the economic modeling software, without any adjustments or projections.

**Display 3      2013 All Souls Procession Estimated Direct Impact/  
Expenditure Summary by Aggregated Category**

***In-Town Attendees, Out-of-Town Travel Parties,  
Total Organizational/Event Expenditures***

<b>Direct Expenditure Category</b>	<b>Total Estimated Direct Expenditures</b>
Costume/Float Materials	\$3,322,875
Lodging	\$948,717
Food/Beverage	\$4,321,845
Entertainment	\$990,254
Transportation	\$444,102
Retail Shopping	\$1,393,584
Other	\$147,875
Organizational/Event Expenditures	\$91,900
<b>TOTAL ESTIMATED DIRECT IMPACTS/ EXPENDITURES</b>	<b>\$11,661,152</b>

**Direct Impact Expenditure Assumptions** – The In-Town Attendee/Out-of-Town Travel Party direct impacts included in the Display 2 and 3 series are derived from report Tables 1 to 7d, based on a number of assumptions and calculation methods, which are summarized below (broken out by economic component):

**In-Town Attendees –**

- Assumed a universe of 87,500 – derived from 100,000 total attendance figure as described in Display 1.
- All In-Town Attendee expenditure totals calculated on a “per case” basis. In-Town Attendees reported their expenditures on a lump-sum total (not daily) basis in each category.
- All extrapolated expenditure totals calculated based on percentage of “valid” cases (i.e. only the share who report a specific category of expense), multiplied by total estimated In-Town Attendees (87,500) and total average expenditure.

**Out-of Town Travel Parties –**

- Assumed a universe of 4,310 – derived from 100,000 total attendance figure as described in Display 1.
- All expenditure totals calculated on a “per case” basis that factors in daily expense multiplied by number of days in Tucson for the 2013 All Souls Procession.
- All extrapolated expenditure totals calculated based on percentage of “valid” cases (i.e. only the share who report a specific category of expense), multiplied by total estimated Out-of-Town Travel Parties (4,310) and total average expenditure. There were no “other” category expenditures reported by Out-of-Town Travel Parties.

**Total Estimated Economic Impacts** – Based on the direct impacts (as summarized in Display 3), the IMPLAN model estimates a total economic impact of \$17,552,524 resulting from the 2013 All Souls Procession. This reflects the direct impacts estimated in this study (\$11,661,152) plus the resulting indirect (\$2,288,270) and induced (\$3,603,102) impacts.

**Display 4 Total Economic Impact of 2013 All Souls Procession**

Direct Impacts	Indirect Impacts	Induced Impacts	Total Impacts
\$11,661,152	\$2,288,270	\$3,603,102	\$17,552,524

# CHARACTERISTICS AND ECONOMIC IMPACTS OF THE ALL SOULS PROCESSION STUDY

(November 2013)

## *Appendix*

### **Survey Methodology and Sample Selection**

This project consists of a 401-person, randomly-selected and statistically projectable sample of On-Lookers and Participants at the 2013 All Souls Procession in downtown Tucson.

All interviews were conducted in person by the FMR field staff on Sunday, November 3<sup>rd</sup>. Event staff facilitated FMR obtaining access to the All Souls Procession venue area. Interviews were conducted prior to the start of the procession, and continued until the survey quota was met. FMR randomly-selected all respondents for participation (by interviewing every third or fourth attendee). FMR attempted to interview the adult head of each randomly-selected attendee party.

Each out-of-area attendee interview lasted approximately 10 minutes; each local area attendee interview, 5 minutes.

All survey respondents were informed that the study was being conducted “regarding the economic impacts of the All Souls Procession.” Respondents were also told that “all responses will be kept confidential and used for research purposes only.”

### **Statistical Reliability**

The statistics in this report are subject to a degree of variation that is determined by sample (or sub-sample) size. All research data are subject to a certain amount of variation for this reason. This does not mean that the figures represented in the various tables are wrong. It means that each percentage represents a possible “range” of response. This is because the random sampling process, as well as human behavior itself, can never be perfect. For this sample, at N=400, the statistical variation is  $\pm 4.9\%$  under the most extreme circumstances – with a 95% confidence level. That is, when the percentages shown in the tables are near 50% (the most conservative situation), the actual behavior or attitude may range from 45.1% to 54.9%. The 95% confidence level means that if the survey were repeated 100 times, in 95 cases the same range of response would result. Those percentages that occur at either extreme (for example, 10% or 90%) are subject to a smaller degree of statistical fluctuation (in this case,  $\pm 2.9\%$ ).



Sub-samples, such as gender or type of attendee, have a higher degree of statistical fluctuation due to the smaller number of respondents in those groupings.

Confidence Intervals for a Given Percent  
(at the 95% confidence level)

N (Base for %)	Reported Percentage				
	10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
400	2.9%	3.9%	4.5%	4.8%	4.9%
300	3.3%	4.5%	5.1%	5.5%	5.7%
200	4.2%	5.5%	6.4%	6.8%	6.9%
150	4.9%	6.6%	7.5%	8.0%	8.2%
100	5.9%	7.8%	9.0%	9.6%	9.8%
50	8.3%	11.1%	12.7%	13.6%	13.9%
25	11.8%	15.7%	18.0%	19.2%	19.6%

*Example:*

If the table shows that 20% of all respondents (when N=400) have a positive or negative attitude about a question category, the chances are 95 out of 100 that the true value is 20%  $\pm$ 3.9 percentage points; that is, the range of response would be 16.1% to 23.9%.

Significance of Difference Between Percentages  
(at the 95% confidence level)

Average of the Bases of Percentages Being Compared	Reported Percentage				
	10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
250	5.2%	7.1%	8.1%	8.6%	8.8%
200	5.9%	7.8%	8.9%	9.6%	9.8%
150	6.8%	9.1%	10.3%	11.0%	11.3%
100	8.3%	11.0%	12.7%	13.6%	13.9%
50	11.7%	15.7%	18.0%	19.2%	19.7%
25	16.7%	22.2%	25.5%	27.2%	27.7%

*Example:* If a table indicates that 35% of All Souls Procession On-Lookers have a positive attitude toward a category of response, and that 26% of Participants have the same attitude, the following procedure should be used to determine if this attitude is due to chance:

The average base is 200 for the reported percentages  $(202+199)/2=200.5$ . The average of the percentages is 30.0% –  $(35+26)/2=30.5\%$ . The difference between the percentages is 9%. Since 9% is greater than 8.9% (the figure in the table for this base and this percentage), the chances are 95 out of 100 that the attitude is significantly different between On-Lookers and Participants.