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The Economic Impact of the World of Winter Festival 2025

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Cover Image: Photo source: World of Winter website.

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1.0 OVERVIEW

1.1 SUMMARY OF ECONOMIC IMPACT

The World of Winter 2025 festival (WoW) is estimated to have generated or supported economic benefits for the city of Grand Rapids in the following ways:

- The total economic impact on the Grand Rapids area is estimated at $38 million in economic output, supporting 335 jobs.
- The total annual fiscal impact (tax revenue) of WoW is estimated at $311,000 for municipalities and $238,000 for Kent County.
- WoW attracted 2.3 million visitors, with 67% visiting from outside the local region.
- 44% of local visitors and 55% of all nonlocal visitors stated that WoW was their primary reason for visiting the area.
- Direct spending of all visitors is estimated at $48 million, with nonlocal visitors spending $38 million (80%).
- 92% of the visitors agreed that the festival inspires a sense of pride in the community. Approximately 33% would have traveled to a different community to attend a similar event if the festival was not available.

1.2 WORLD OF WINTER FESTIVAL BACKGROUND

The World of Winter 2025 festival (WOW) in Grand Rapids, Michigan, was held from January 10 to March 2, 2025. Recognized as the largest winter festival in the United States, WoW featured over 100 events, outdoor art installations, activities, window displays, ice sculptures, and more. The festival is designed to celebrate Downtown Grand Rapids as a winter destination and provide attractions for people of all ages and backgrounds. Now an annual staple in the Downtown events calendar, WoW combines new and returning events with local, regional, national, and global art to curate a unique and authentic experience over two months in Downtown Grand Rapids. Highlights include:

Interactive Art Installations: WoW showcased numerous light-based and interactive artworks from places as far away as Australia, France, and Thailand, as well as pieces from leaders in the art and design community right here in Grand Rapids.

Cultural Performances & Unique Experiences: WoW featured diverse cultural celebrations, walking tours, live performances, and family-friendly activities. Each year, crowd favorites like Silent Disco, Noodle Fest, the Great Lakes Snow Snake Competition, and Human Hungry Hungry Hippos return. In addition, new events were added this year, including a Native Drum and Hoop Dance, an outdoor upcycled fashion show, a music production battle, and more.

WoW is organized, produced, and funded by Downtown Grand Rapids Inc. (DGRI)**,** with in-kind support from the City of Grand Rapids and sponsorships from numerous community partners. DGRI's mission is to make Grand Rapids the most admired, emulated, attractive, and well-run city of its size in the nation – with an unsurpassed reputation as a forward-thinking bright spot to watch for how to do "Downtown."

1.3 SCOPE OF WORK

To measure the economic contribution (direct and indirect) of the WoW to the Grand Rapids region. The economic impact is the amount of economic activity that WoW generates within a defined region. For the purpose of this report, the local region is defined as Grand Rapids, Michigan. This study will quantify the number of visitors to WoW, spending patterns by those visitors, and the indirect/induced values as a result of that spending. Every effort is made to exclude substitute spending. This substitute spending may come in the form of local residents along with visitors who were in the area for other reasons.

1.4 METHODOLOGY

For this analysis of WoW, annual economic and fiscal impacts were estimated for visitors to WoW and operational spending associated with hosting WoW.

1.4.1 VISITORS TO WW

Placer.ai data will be used to estimate actual visitor counts.[1] Placer.ai estimated attendance to WoW by analyzing anonymized GPS location data from mobile devices that were present in the designated festival areas during the event period. In general, here is how the process works:[2]

1. **Define the geographic boundaries of WoW**: This is known as Geofencing. Placer.ai first creates custom geofences around key locations where the festival takes place—such as Calder Plaza, Ah-Nab-Awen Park, Canal Park, Gillett Bridge, and Downtown corridors hosting installations or events.

2. **Collect and analyze mobile device pings:** Placer.ai monitors mobile device signals (collected from partner apps on users' smartphones) within those geofences throughout the festival duration. These signals include time-stamped GPS data that indicate when and where devices enter and exit a location.

3. **Visitor Identification**: Using machine learning algorithms, Placer.ai distinguishes between different types of individuals based on their movement patterns. For example, someone who spends approximately eight hours a day at a location regularly may be classified as an employee, while someone who spends nights at a location consistently could be identified as a resident. This helps in isolating actual event attendees from others.

4. **Data Extrapolation**: Since the data is collected from a sample of devices, Placer.ai extrapolates the findings to estimate total attendance. This involves accounting for panel biases and ensuring the sample accurately represents the broader population.

5. **Analysis and reporting:** The platform provides insights into various metrics such as total unique visitors, visit frequency, dwell time, and visitor demographics.

To collect supplemental visitor data, a Qualtrics survey was administered during the WoW months. The survey was distributed by DGRI employees attending WoW events and through DGRI email distribution lists. Data collected included zip code, length of visit, party size, spending patterns, and other relevant information. Respondents were required to be at least 18 years old to participate. A total of 1,245 completed responses were recorded during the survey period.

There is some concern regarding potential sampling bias in both the survey data and mobile device estimates used in this study. These limitations, along with their possible effects on the

[1] https://www.placer.ai/
[2] https://www.placer.ai/foot-traffic-analytics

results, are discussed in the relevant sections throughout the report. While efforts were made to minimize bias, some level of distortion in representation may still be present.

In calculating the economic impact of WoW, only spending that is directly or indirectly attributable to the festival is considered. To achieve this, survey respondents were categorized into the following distinct groups:[3]

Local Visitors: Individuals whose primary residence is within the defined local region (Grand Rapids area). Because their spending may have occurred regardless of WoW, it is generally excluded from the economic impact calculation. Placer.ai data and zip codes provided in the survey are used to identify local residents.

NonLocal Visitors: Individuals residing outside the defined economic region. Their spending represents a key driver of economic impact, as it brings new money into the local economy. Placer.ai data and zip codes provided in the survey are used to identify local residents.

Primary Visitors: Visitors whose primary reason for being in Grand Rapids was to attend WoW. These visitors may be either local or nonlocal. Nonlocal primary visitors are especially important, as they are considered the primary contributors to new spending in the region.

Casual Visitors: Visitors who were already in Grand Rapids for other purposes (e.g., family visits, business, other events) but chose to attend WoW. Because their visit was not driven by the festival, their spending is generally excluded from the economic impact estimate. However, their incremental spending—spending that occurred specifically due to their participation in WoW—may still be considered as *economic impact supported by* the event.

Unfortunately, collecting incremental spending data was beyond the scope of the visitor's survey, therefore this study will focus solely on primary visitors. Therefore, this study will calculate the economic impact based solely on spending by primary visitors—both local and nonlocal—whose main purpose for visiting Grand Rapids was to attend WoW. This approach helps avoid overstating the impact due to substitute spending, which occurs when casual visitors redirect spending they would have made in the region regardless of WoW.

[3] Crompton, J. L., Lee, S., & Shuster, T. J. (2001). A Guide for Undertaking Economic Impact Studies: The Springfest Example. *Journal of Travel Research, 40*(1), 79-87. doi:10.1177/004728750104000110

1.4.2 WoW Operations

Operational spending is typically included in economic impact studies because it reflects ongoing expenditures—such as staffing, vendor payments, logistics, and site services—that support local employment and stimulate business activity. However, this analysis excludes such spending from the reported impact.

1.4.3 Economic Modeling

The economic impact is estimated using the IMPLAN model. IMPLAN is a regional economic analysis software application that is designed to estimate the impact or ripple effect (specifically backward linkages) of a given economic activity within a specific geographic area through the implementation of its Input-Output model.[4] This modeling system uses multipliers that provide a way to measure the complete economic impact that the initial change in demand has on the local economy. The results of an input-output model are broken down into three effects:[5]

Direct Effects	A set of expenditures applied to the input-output multipliers. The direct effect is often referred to as direct spending or initial change in demand. This direct spending, or initial change in demand, is determined by the researcher or analyst. Applying these initial changes to the multipliers in IMPLAN will then display how a region will respond economically to them.
Indirect Effects	Indirect effects are the business-to-business purchases in the supply chain taking place in the economic region that stem from the initial change in demand or direct spending (direct effects). In other words, this is the increase in sales by businesses that are suppliers to restaurants, hotels, retail stores, etc.
Induced Effects	Increased economic activity from household spending of labor income, after the removal of taxes and savings. The induced effects are generated by the spending of employees within the business' supply chain.

[4] Full IMPLAN disclaimer can be found in Appendix A1: IMPLAN Disclaimer and Definitions.
[5] https://blog.implan.com/understanding-implan-effects.

The IMPLAN model will report economic impact in four ways:[6]

Output	**Gross output** is the total economic activity, including the sum of intermediate inputs and the value they add to the final good or service. The intermediate inputs are the resources used in the production of final goods and services. It should be noted that gross output can be overstated if the intermediate inputs are used multiple times in the production of other goods and services.
Labor Income	The increase in wages, salaries, and proprietors' income as a result of the initial change in demand (direct effects).
Employment	The total number of jobs supported by direct spending or initial change in demand. This measurement does not distinguish between a full-time or part-time employee. It also does not account for employees who moved from one job to another within the defined economic region. Thus it does tend to overstate the number of jobs created.
Value Added	The contribution to the economic region's gross domestic product (GDP).

In many cases, the results of the economic impact analysis are rounded to the nearest million to avoid conveying a false sense of precision. Readers should keep in mind that the figures presented are estimates generated through economic modeling, not the result of a formal financial audit. The purpose of rounding is not to obscure information, but to present reliable results while maintaining transparency about the inherent limitations of model-based analysis.

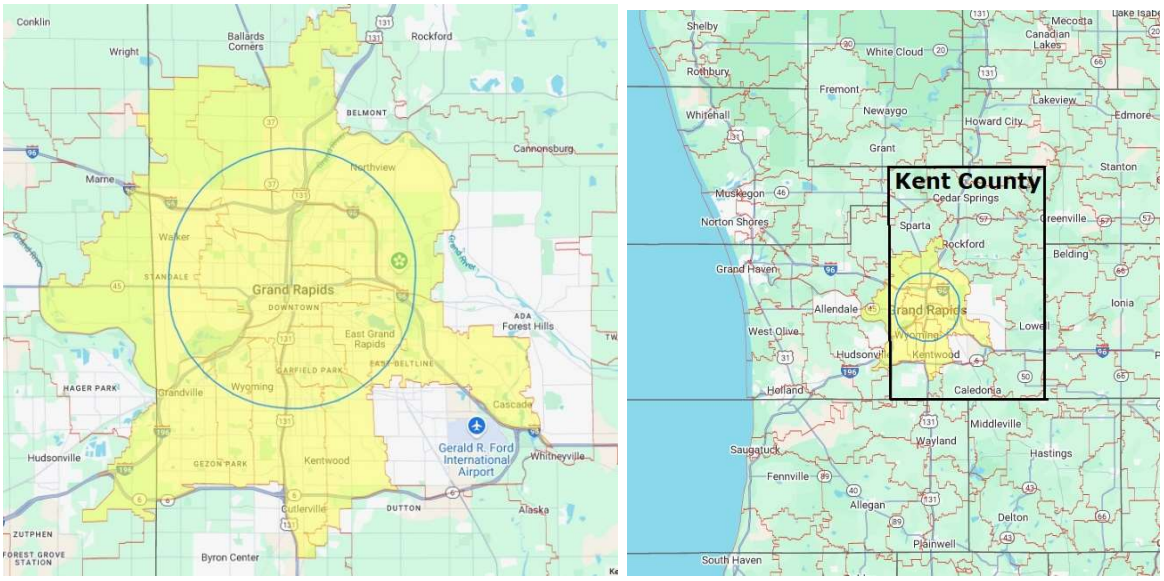
[6] Expanded definitions can be found in Appendix A1: IMPLAN Disclaimer and Definitions.

2.0 VISITORS AND ATTENDANCE

2.1 DEFINING THE ECONOMIC REGION

To accurately assess the economic impact, it is necessary to first define the local region. For this report, the local region is defined as a five-mile radius surrounding Sixth Street Park in Downtown Grand Rapids (see Figure 1).[7]

Figure 1: The defined economic region: Grand Rapids (5-mile radius)



[7] The map in Figure 5 was created using www.randymajors.org. The Demographics of the economic region can be found in Appendix A3: Economic Region.

2.2 THE NUMBER OF VISITORS AND VISITOR DAYS

As noted in Section 1.4.1, this study focuses on the economic impact generated by the WoW, specifically by primary visitors. Visitor counts were estimated using Placer.ai data. As described in Section 1.4.1, Placer.ai uses proprietary algorithms to distinguish between different types of individuals based on movement patterns. For instance, someone who spends approximately eight hours per day at a location may be classified as an employee, while someone who spends nights in the area is likely a resident. This classification helps isolate actual event attendees from regular local traffic.

Placer.ai data estimated 1.4 million unique adult or device-carrying visitors to WoW. Of those, around 669,000 adult visitors were recorded as spending more than 2.5 hours in the area. These outliers may reflect behavior more consistent with casual visitors—individuals who were likely in the area for other purposes unrelated to the festival. Therefore, for this study, these visitors will be classified as casual visitors and excluded from the primary visitor impact analysis.

To account for children—who are typically not captured in mobile device data—survey responses were used to calculate the average number of children per adult attendee. Applying this ratio results in an estimated total attendance of 2.3 million. See Table 1 for a detailed breakdown by visitor type and Table 2 for total visitors by visitor type.[8]

Table 1: Breakdown of visitors by types

	Local primary visitors	Nonlocal primary visitors	Local casual visitors	Nonlocal casual visitors
Visitor types	44.21%	55.41%	42.31%	53.03%

Table 2: Total visitors based on visitor type

	All visitors	Primary visitors	Casual visitors
Local visitors	806,371	407,698	398,673
Nonlocal visitors	1,535,977	827,650	708,326
Total Visitors	2,342,348	1,235,348	1,107,000

[8] For visitor demographic data, see Appendix A2: Visitor Demographics

The survey asked respondents how many times they attended WoW events. Based on these responses, local primary visitors attended an average of 2.98 times, while nonlocal primary visitors attended an average of 2.80 times. The survey data is consistent with Placer.ai data, which showed visitors visited on average 2.99 times.

Using the survey data and the attendance figures from Table 2, the total number of visitor days can be estimated. A *visitor day* is a metric that represents one person attending the event on one day. It is calculated by multiplying the number of visitors by the average number of visits. Table 3 presents the estimated number of visitor days.

Table 3: Total visitor days based on visitor type

	All visitors	Primary visitors	Casual visitors
Local visitor days	1,838,911	1,214,939	623,971
Nonlocal visitor days	2,867,063	1,903,596	963,467
Total visitor days	4,705,973	3,118,535	1,587,438

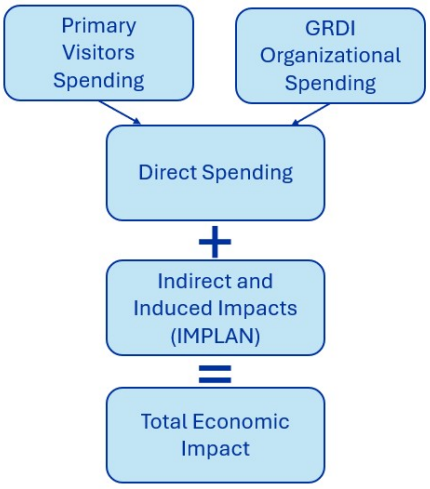
3.0 ECONOMIC EFFECTS

This section estimates the economic impact generated by visitors to WoW. The analysis is based on data collected through visitor surveys, Placer.ai mobility data, and information provided by the event organizers. In addition to the economic impact, this section also includes an estimate of the fiscal impact in terms of tax revenues generated.

3.1 ESTIMATING DIRECT SPENDING

The economic impact begins with direct impacts or direct spending by visitors. This initial spending generates additional economic activity through indirect and induced impacts. For example, when a visitor purchases at a local retail store, that is considered direct spending. In turn, the retail store must restock inventory, often from local suppliers—this is classified as indirect spending. Additionally, store employees and owners may see increased income from higher sales, which they then spend within the local economy, creating induced impacts**.** The dollar value and employment effects of these indirect and induced impacts are estimated using the IMPLAN economic modeling software. Visitor survey data provided detailed spending

estimates across key categories such as meals, shopping, lodging, transportation, and other expenses.



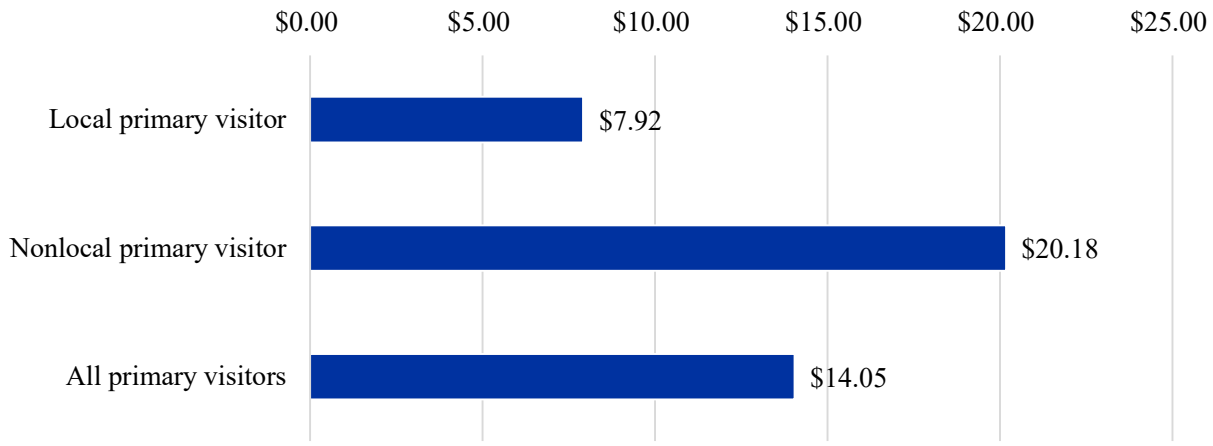
Direct spending is calculated by multiplying per-person, per-day visitor spending by the total number of visitor days. It is important to note that spending categories involving retail purchases must be adjusted to reflect only the portion of the transaction that remains within the local economy. Retail prices often include the cost of goods manufactured outside the defined economic region, and these external production costs should not be included in the local economic impact. The IMPLAN economic modeling system accounts for this by applying retail margin adjustments, which allocate only the local portion of spending to the impact estimates. For this analysis, retail margins are estimated at **34.20%** for retail spending and **6.8%** for transportation spending.

3.2 ECONOMIC IMPACT OF PRIMARY VISITORS

As noted in Section 1.4.1, this study focuses on the economic impact generated by primary visitors to WoW. Based on survey responses, the average daily spending per person across all primary visitors was $14.05, with local primary visitors spending $7.92 and nonlocal primary visitors spending $20.18 per person, per day (see Figure 9). Applying these spending figures to the estimated number of visitor days results in approximately $48 million in direct spending by all primary visitors, with 80% of this total attributed to nonlocal visitors.[9]

[9] A more detailed breakdown is available in Appendix A4: Estimating Visitor Spending

Figure 2: Average per person, per day spending for primary visitors



As previously discussed, direct visitor spending generates additional economic activity through indirect and induced effects. These impacts can be estimated using the IMPLAN economic modeling software. Based on this model, the total annual economic impact generated by primary visitors to WoW is estimated at $47 million in output, supporting approximately 406 jobs. To isolate the impact of new spending in the region, the focus is placed on nonlocal primary visitors, who account for approximately 88% of the total economic output. The table below presents a breakdown of the economic impact attributable to all primary visitors.

Table 4: Total annual economic impact of all primary visitors

All Primary Visitors	Direct Spending[10]	Employment	Labor Income	Value Added (GDP)	Output
Local Primary Visitors	$5.9M	65	$2.3M	$3.7M	$6.7M
Nonlocal Primary Visitors	$27.7M	266	$10.1M	$18.9M	$31.3M
Total economic impact	$33.6M	331	$12.4M	$22.6M	$38.0M

[10] The direct spending reflects the retail margins mentioned in section 3.1

3.3 FISCAL IMPACT

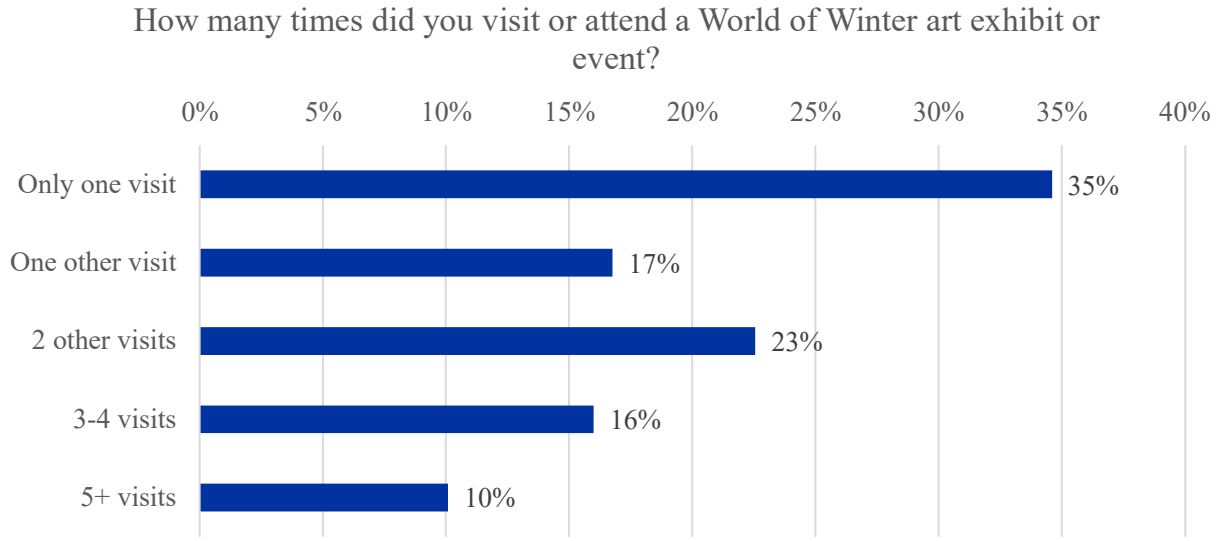
The increase in economic activity resulting from WoW also generates additional tax revenue at the local, state, and federal levels. IMPLAN's fiscal impact analysis estimates tax revenues generated through direct, indirect, and induced economic activity, including taxes paid by businesses, employees, and consumers. This includes property taxes, sales taxes, income taxes, and other business-related taxes. The table below presents the estimated total fiscal impact generated by the WoW visitors.

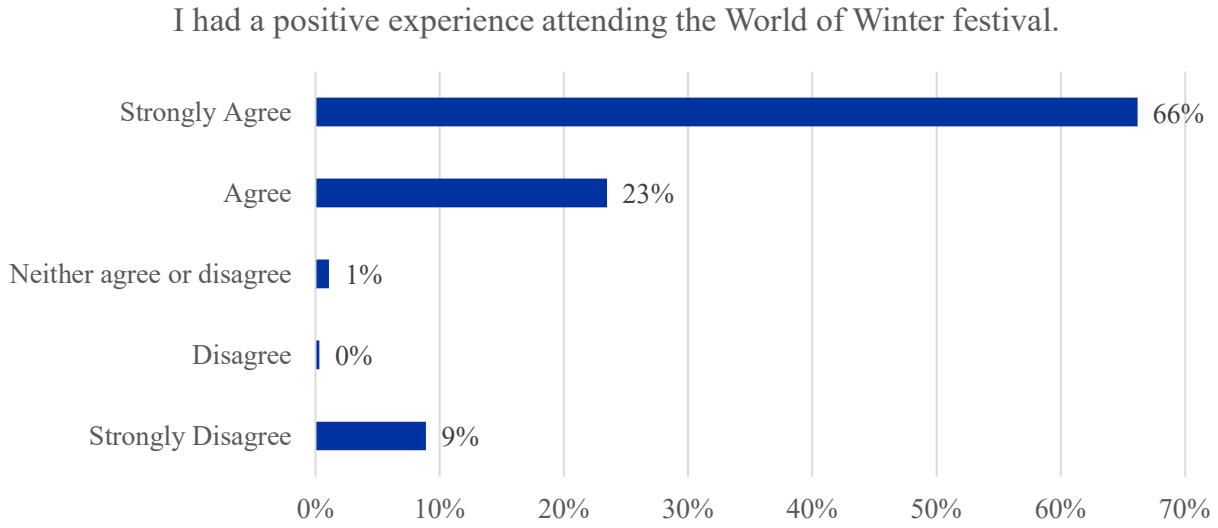
Table 6: Fiscal impact of all primary visitors

All Primary	Sub-County: Municipalities	Sub-County: Special Districts	Kent County	Michigan
Direct Impact	$298,903	$793,904	$228,240	$2,305,985
Indirect Impact	$8,216	$19,605	$5,635	$67,210
Induced Impact	$4,705	$12,224	$3,514	$38,676
Total Impact	$311,825	$825,734	$237,389	$2,411,871

4.0 SENSE OF PLACE

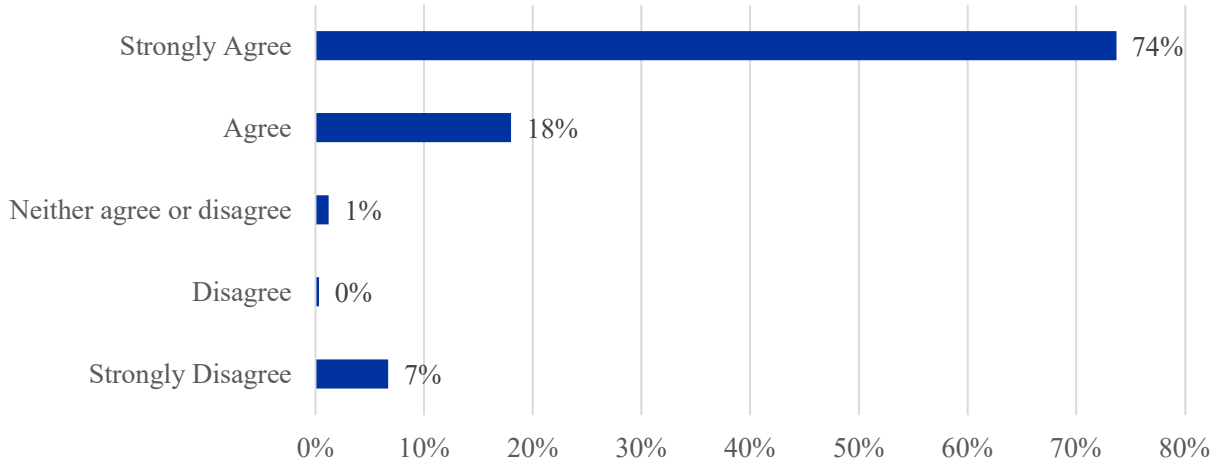
This portion of the study summarizes the results of the "sense of place" survey. The purpose of this survey is to assess how local residents perceive the WoW and its impact on community identity, pride, and overall quality of life. By capturing public sentiment, the survey provides insight into the festival's social and cultural value beyond its economic contributions. The survey questions were included in the Qualtrics visitor survey.



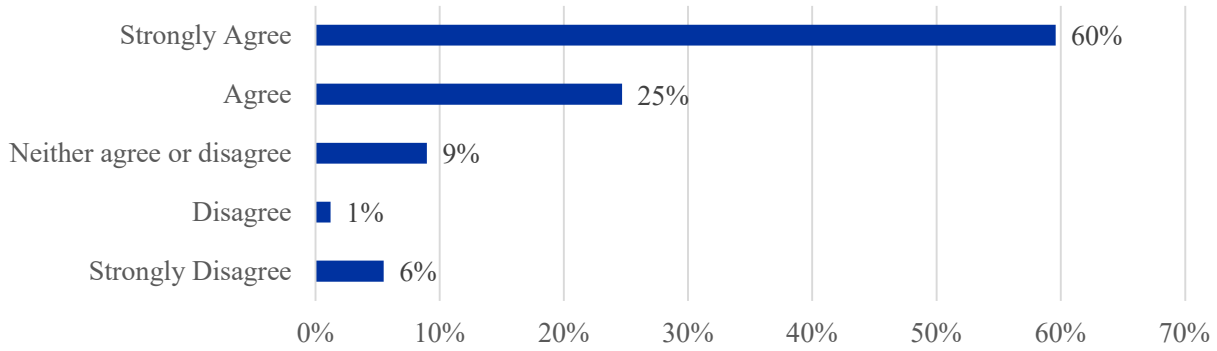


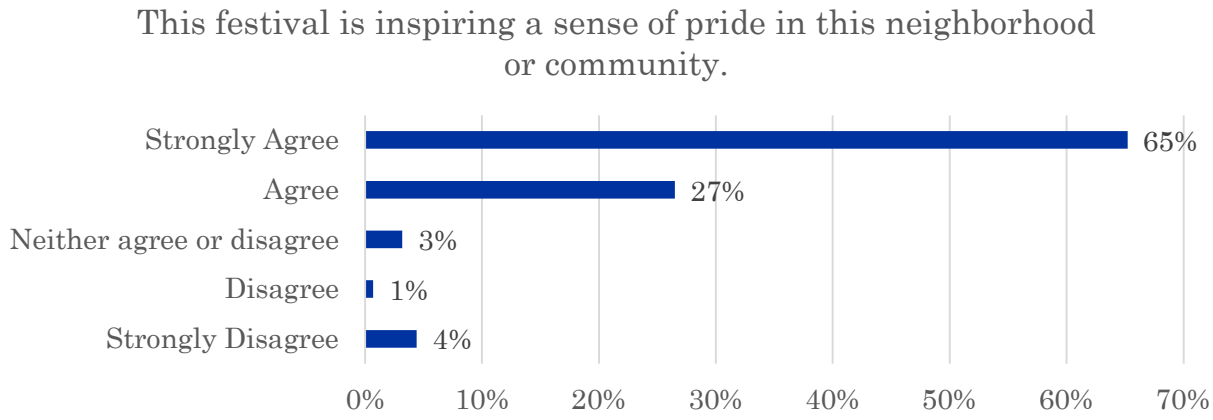
On a scale of 1 to 10, with 10 being the highest.	Mean
How likely are you to recommend attending the World of Winter Festival to your friends or colleagues?	8.76

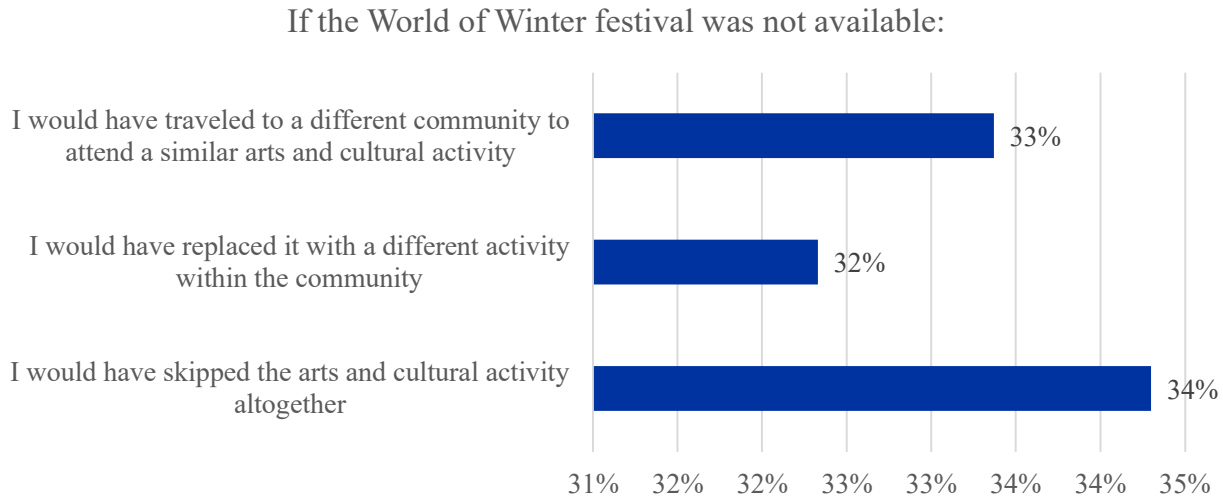
I feel the World of Winter festival contributes positively to the local area.



I would feel a great sense of loss if this festival were no longer available.







5.0 CONCLUSION

This report focuses on the economic impact WoW provided to the Grand Rapids area. The total economic impact is estimated at $38 million in output with support for 336 jobs. Approximately 80% of the economic output is generated by nonlocal primary visitors. The table below presents a summary of the annual economic impact of WoW.

Table 19: Summary of the annual economic impact of WoW

	Direct Spending	Employment	Labor Income	Value Added (GDP)	Output
Local Primary Visitors	$5.9M	65	$2.3M	$3.7M	$6.7M
Nonlocal Primary Visitors	$27.7M	266	$10.1M	$18.9M	$31.3M
Total economic impact	$33.6M	331	$12.4M	$22.6M	$38.0M

The impact of casual visitors is not included in the overall economic impact because they were in Grand Rapids for reasons other than WoW. Because their visit was not driven by the festival, their spending is generally excluded from the economic impact estimate.[11]

The increase in economic activity generated by WoW also results in additional tax revenue at the local, state, and federal levels. These fiscal impacts are estimated using the IMPLAN economic model. As detailed in Section 3.4, WoW is estimated to generate $311,000 in tax revenue for local municipalities**,** $826,000 for special districts**,** $238,000 for Kent County, and $2.4 million for the State of Michigan**.**

In addition to the immediate economic activity, WoW may also contribute to long-term economic and cultural benefits for the Grand Rapids area. These potential long-term impacts include increased tourism, stronger brand identity for the city, enhanced quality of life for residents, and increased investment in public spaces and Downtown development. Culturally, the festival fosters community engagement, supports local artists and performers, and helps create a more vibrant, inclusive sense of place during the winter months. While these impacts are more difficult to quantify, they play a critical role in the sustained vitality of the region. Ω

[11] For information on casual visitors, see Appendix A5: The Economic Impact of Casual Visitors.

APPENDIX

A1: IMPLAN DISCLAIMER AND DEFINITIONS

IMPLAN is a regional economic analysis software application that is designed to estimate the impact or ripple effect (specifically backward linkages) of a given economic activity within a specific geographic area through the implementation of its Input-Output model. Studies, results, and reports that rely on IMPLAN data or applications are limited by the researcher's assumptions concerning the subject or event being modeled. Studies such as this one are in no way endorsed or verified by IMPLAN Group, LLC unless otherwise stated by a representative of IMPLAN.

IMPLAN provides the estimated Indirect and Induced Effects of the given economic activity as defined by the user's inputs. Some Direct Effects may be estimated by IMPLAN when such information is not specified by the user. While IMPLAN is an excellent tool for its designed purposes, it is the responsibility of analysts using IMPLAN to be sure inputs are defined appropriately and to be aware of the following assumptions within any I-O Model:

- Constant returns to scale
- No supply constraints
- Fixed input structure
- Industry technology assumption
- Constant byproducts coefficients
- The model is static

By design, the following key limitations apply to Input-Output Models such as IMPLAN and should be considered by analysts using the tool:

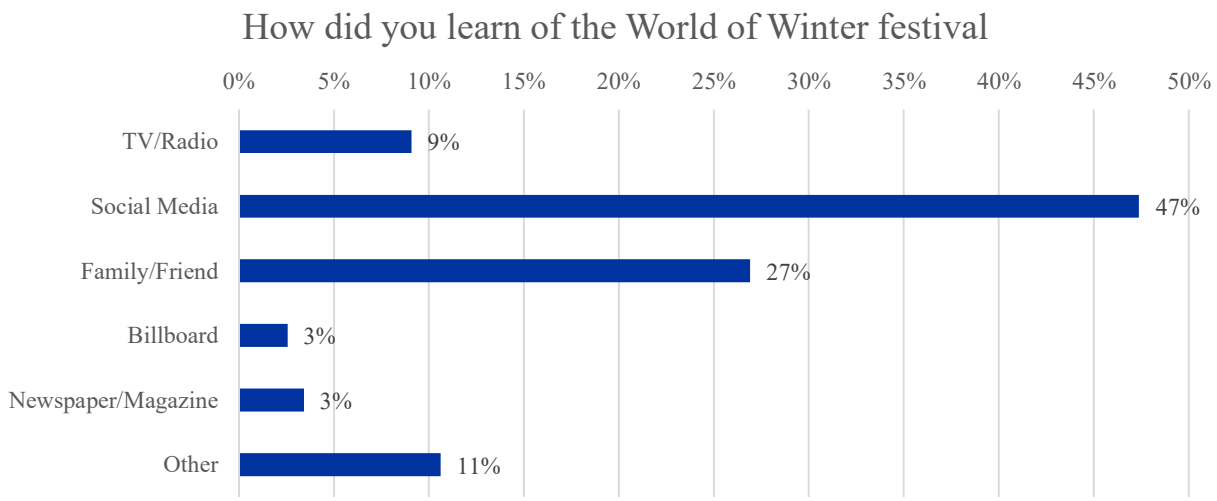
- **Feasibility:** The assumption that there are no supply constraints and there is a fixed input structure means that even if input resources required are scarce, IMPLAN will assume it will still only require the same portion of production value to acquire that input unless otherwise specified by the user. The assumption of no supply constraints also applies to human resources, so there is assumed to be no constraint on the talent pool from which a business or organization can draw. Analysts should evaluate the logistical feasibility of a business outside of IMPLAN. Similarly, IMPLAN cannot determine whether a given business venture being analyzed will be financially successful.

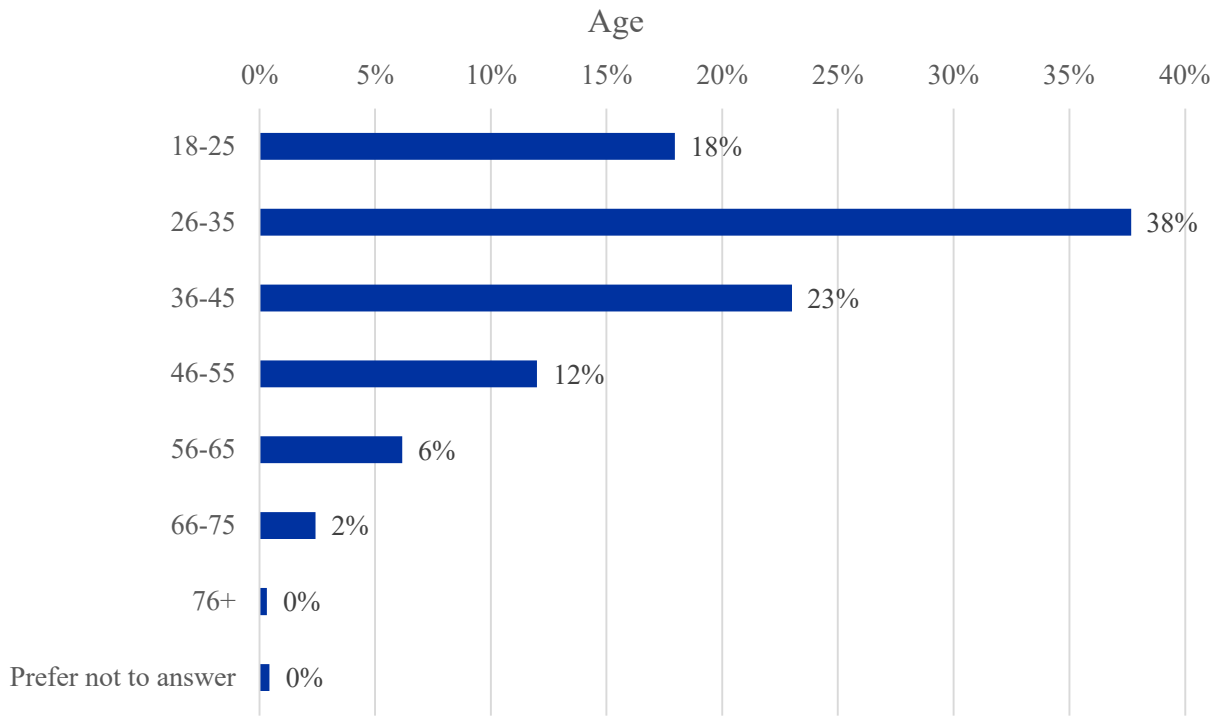
- **Backward-linked and Static model:** I-O models do not account for forward linkages, nor do I-O models account for offsetting effects such as cannibalization of other existing businesses, diverting funds used for the project from other potential or existing projects, etc. It falls upon the analyst to take such possible countervailing or offsetting effects into account or to note the omission of such possible effects from the analysis.

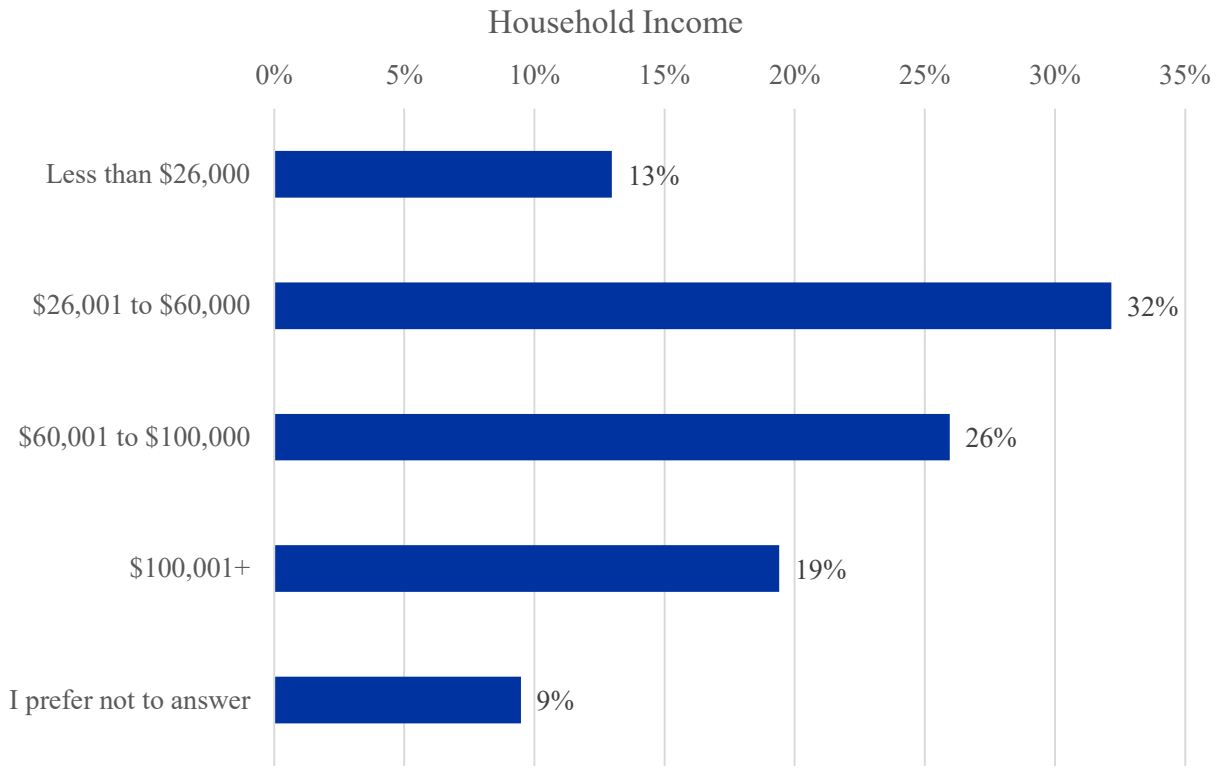
- **Like the model, prices are also static:** Price changes cannot be modeled in IMPLAN directly; instead, the final demand effects of a price change must be estimated by the analyst before modeling them in IMPLAN to estimate the additional economic impacts of such changes.

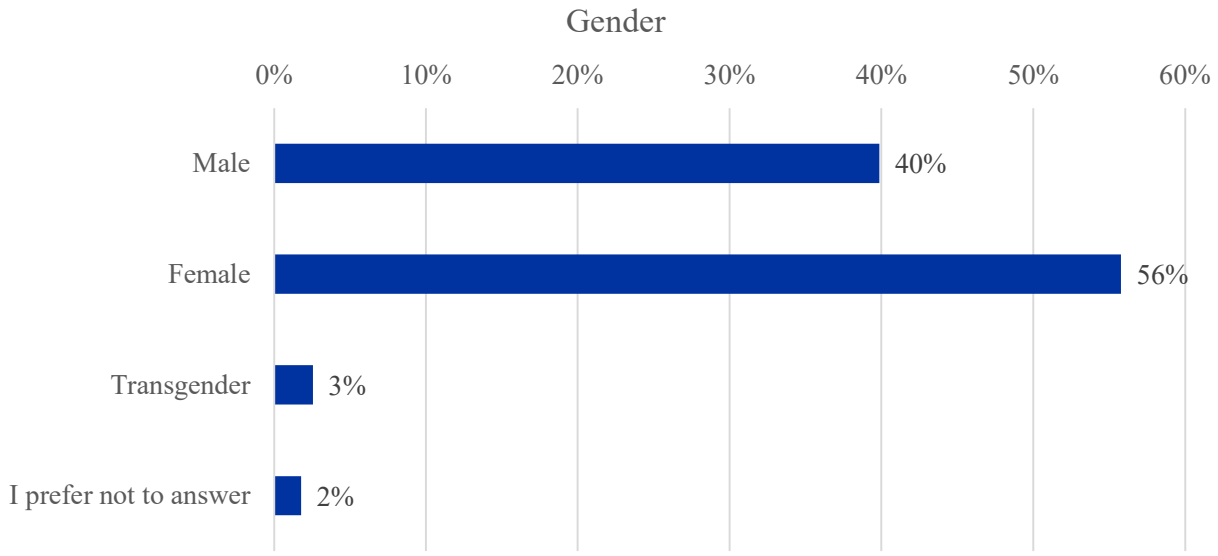
A2: VISITOR DEMOGRAPHICS

The survey asked additional questions about their visit to Grand Rapids. The tables below summarize the responses from all visitors.









A3: THE ECONOMIC REGION

The economic region is defined as a five-mile radius from Sixth Street Park in downtown Grand Rapids (as shown in Figure 1). This radius includes 11 zip codes and covers the majority of Grand Rapids (see Figure A2-1 for the demographics of this region).[12]

Figure A2-2: Key statistics for the defined economic region

Demographics of the Economic Region (2023 Data Year)			
Population	262,883	Education	
Households	105,434	No High School Diploma	13.16%
Median age*	32.3	High School Graduate – No College	30.64%
Family size*	3.09	Bachelor's degree or higher	20.92%
Persons under 18*	19.5%	Income and Poverty	
Persons 65 years and older*	13.6%	Median household income*	$70,258
Female persons*	50.9%	Per capita income*	$33,953
		Poverty rate*	18.3%
		Top 5 Employment by Industry	
Race		Hospitals	13.7%
White	63.2%	Employment Services	7.3%
Black or African-American	14.2%	Food Service (Restaurants, etc.)	7.1%
American Indian and Alaska Native	0.24%	Retail Trade	4.6%
Asian	3.31%	Other Real Estate	2.88%
Hispanic or Latino	13.63%	Economic Data	
		Economic Output	$47B
Housing		Gross Domestic Product	$24.8B
Median house value*	$225,500	Total Employment	236,290
Homeownership rate*	54.4%	Personal Income	$17.4B

A4: ESTIMATING VISITOR SPENDING

[12] Data taken from IMPLAN. Data with an "*" taken from the Census Bureau for Grand Rapids, MI (not the 5-mile radius).

As noted in Section 1.4.1, this study focuses on the economic impact generated by primary visitors to WOW. Based on survey responses, the average daily spending per person across all primary visitors was $14.05, with local primary visitors spending $7.92 and nonlocal primary visitors spending $20.18 per person, per day (see Table A4-1).

Table A4-1: Spending per person, per day by primary visitors

Category	Local primary visitors	Nonlocal primary visitors	All primary visitors
Meals/Food Spending	$3.84	$7.15	$5.50
Lodging	$0.00	$5.71	$2.86
Retail/Other Spending	$2.65	$4.34	$3.50
Transportation Spending	$1.43	$2.98	$2.21
Total Spending	$7.92	$20.18	$14.05

Applying these spending figures to the estimated number of visitor days results in approximately $48 million in direct spending by all primary visitors, with 80% of this total attributed to nonlocal visitors (see Table A4-2).

Table A4-2: Total direct spending by primary visitors

Category	Local primary visitors	Nonlocal primary visitors	All primary visitors
Meals/Food Spending	$4.7M	$13.6M	$18.3M
Lodging	$0.0M	$10.9M	$10.9M
Retail/Other Spending	$3.2M	$8.3M	$11.5M
Transportation Spending	$1.7M	$5.7M	$7.4M
Total Spending	$9.6M	$38.4M	$48.0M

A5: THE ECONOMIC IMPACT OF CASUAL VISITORS

As noted in Section 1.4.1, casual visitors are defined as individuals who were already in Grand Rapids for other purposes (e.g., family visits, business, or other events) but chose to attend WOW. Because their visit was not driven by the festival, their spending is generally excluded from the economic impact estimate. However, incremental spending—expenditures made specifically due to their participation in WOW—may still be considered economic activity supported by the event.

This study's preferred methodology is to calculate economic impact based solely on spending by primary visitors, both local and nonlocal, whose main reason for visiting Grand Rapids was to attend WOW. While this approach may understate the total impact—since some casual visitors likely increased their spending due to the festival—the collection of incremental spending data was beyond the scope of the visitor survey. Therefore, this report focuses exclusively on primary visitor spending. Casual visitor data is presented here for informational purposes only.

Table A5-1: Spending per person, per day by casual visitors

Category	Local casual visitors	Nonlocal casual visitors	All casual visitors
Meals/Food Spending	$5.24	$5.99	$5.62
Lodging	$0.00	$2.79	$1.40
Retail/Other Spending	$2.15	$2.81	$2.48
Transportation Spending	$1.26	$1.41	$1.34
Total Spending	$8.65	$13.00	$10.83

Table A5-2: Total direct spending by casual visitors

Category	Local casual visitors	Nonlocal casual visitors	All casual visitors
Meals/Food Spending	$3.3M	$5.8M	$9.0M
Lodging	$0.0M	$2.7M	$2.7M
Retail/Other Spending	$1.3M	$2.7M	$4.0M
Transportation Spending	$0.8M	$1.4M	$2.1M
Total Spending	$5.4M	$12.5M	$17.9M

Table A5-3: Total annual economic impact of all casual visitors

All Casual Visitors	Direct Spending [13]	Employment	Labor Income	Value Added (GDP)	Output
Local Casual Visitors	$3.8M	42	$1.5M	$2.3M	$4.3M
Nonlocal Casual Visitors	$9.5M	95	$3.5M	$6.3M	$10.7M
Total economic impact	$13.3M	137	$5.0M	$8.6M	$15.0M

[13] The direct spending reflects the retail margins mentioned in section 3.1