

2018 Tulip Time Festival  
Attendance and Economic Impact Report



## Contents

Executive Summary.....	3
Introduction .....	4
Methodology .....	4
Survey.....	4
Population Estimates.....	5
Economic Impact .....	5
Survey Results.....	6
Visitor Demographics .....	6
Visitor Reports.....	9
Site Specific Data.....	15
Attendance Estimates.....	17
Economic and Fiscal Impacts of the Tulip Time Festival .....	19
Direct Operating Expenses.....	19
Direct Visitor Expenses.....	19
Direct Participant Expenses .....	20
Direct Visitor and Participant Expenses .....	20
Festival Visitors Total Economic Impacts.....	22
Tax Revenue .....	23
Tulip Time Operations Total Economic Impacts.....	23
Tax Revenue .....	24
Conclusion.....	24
Appendix I – Data Tables – All Data.....	26
Appendix II – Visitor Survey.....	31
Appendix II – Participant Survey.....	39
Appendix III – Visitor / Participant Spending Detailed Sector Impact.....	41

## Executive Summary

The Frost Research Center contracted with Tulip Time to conduct an economic impact study of the festival in 2018. A combination of primary and secondary data allowed the Frost Research Center to estimate the overall economic impact of this important event in Holland, MI. The following summarizes the study's findings:

### Survey Results

- Tulip Time attendees were most often from outside of the Holland area and those staying overnight most often stayed in a hotel or motel.
- Eighty percent (80%) of respondents identify racially / ethnically as white and eleven percent (11%) as Asian / Pacific Islander.
- Most visitors had heard of Tulip Time through informal, word of mouth avenues . The average time spent at the festival is 2.67 days and the average amount a visitor spent (per person per day) at Tulip Time was \$133.94.
- Nearly half of visitors were visiting Tulip Time for the first time.
- Visitors are extremely likely to recommend the Tulip Time Festival to family and friends.

### Attendance Estimates

- Tulip Time 2018 had an estimated 133,182 unique visitors which equates to 355,595 attendee days.
- 15,006 individuals participated in Tulip Time 2018 for an estimated total of 23,201 participant days.

### Economic and Fiscal Impact

- Total spending by Tulip Time visitors is estimated to be \$47.6 million.
- Participants were estimated to have spent \$787,905.
- The total economic impact of visitor and participant spending which includes direct, indirect and induced effects is estimated to be \$74.8 million
- This equals an estimated \$7.5 million of local (state, county, sub county and special sub county) tax revenue.
- Tulip Time's operational expenses created a total economic effect of 2.8 million and \$13,075 of local tax revenue.

### Conclusion

- The Tulip Time Festival in Holland, Michigan creates a large positive impact for the local economy.
- Through direct, indirect and direct effects, Tulip Time supports over an estimated 800 jobs in the county.
- Tourism money to the area most positively affects the hotel / motel, restaurant, retail, and promoters of performing arts (entertainment) sectors.

## Introduction

Tulip Time began when a high school biology teacher in Holland, MI advocated for a town flower to commemorate Holland's unique heritage and a festival day for the town to celebrate the tulips together. Two years later in 1929, the city council planted 100,000 tulips in preparation for the celebratory day. Tulip Time has continued for nearly 90 years and has grown to planting over 5 million tulips each year.

The 2018 Tulip Time Festival began on May 5 and concluded May 13 in Holland, MI. The Festival draws both local and nonlocal visitors to enjoy the blooming tulips and the rich cultural heritage. Tulip Time celebrates the City of Holland's Dutch heritage while including other people groups now living in the Holland area. The nine (9) day festival boasts of activities for all ages including parades, evening shows, art and food vendors, Dutch dance performances, as well as various parks, tours and streets lined with diverse tulip varieties.

Tulip Time contracted the Frost Research Center in 2017 to estimate the festival's impact on the Holland area and Ottawa County. Tulip Time sought demographic information about the festival goers as well as information about their habits and activities while visiting. Attendance estimates and spending habits were assessed through the use of in-person structured interviews and existing ticketing data to calculate an overall estimated economic impact for Ottawa County. The following report details these estimates and findings.

## Methodology

### *Survey*

Visitor estimates were calculated through personal interviews with attendees. Frost Research Center survey administrators attended a mandatory training to ensure proper survey sampling and accurate data collection. Survey administrators were coached on how to approach festival participants. In addition, the survey script and questions were rehearsed and reviewed to insure data accuracy between participants and researchers.

Survey administrators conducted in-person interviews with attendees in a total of 16 locations on nine (9) festival days. This equated to a total of 56 shifts of two people. Survey administrators wore Frost Research Center t-shirts with a Tulip Time logo and a nametag to indicate their role as survey administrators. Potential respondents were greeted and asked if they had some time to answer some questions on behalf of Tulip Time.

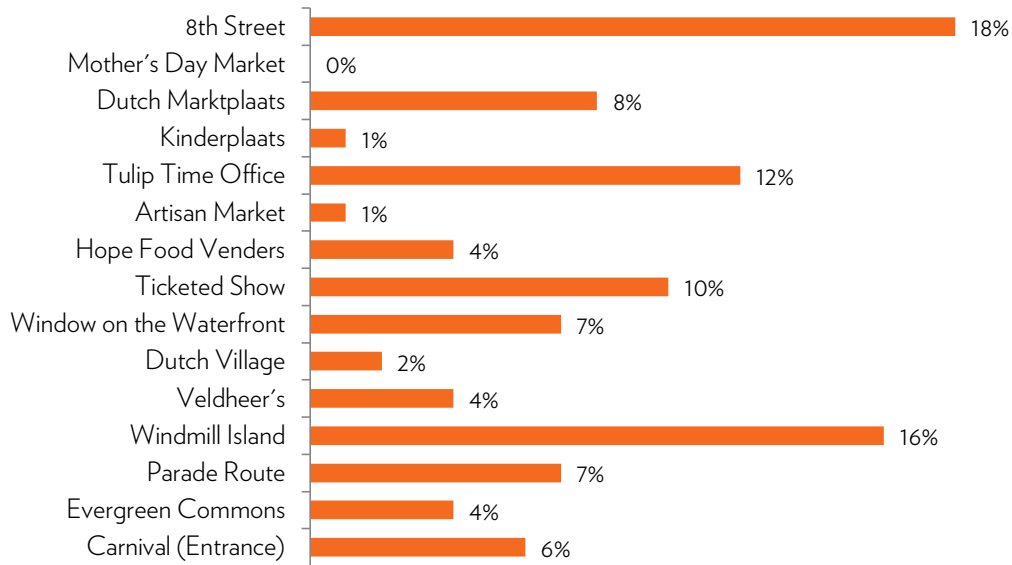
Survey administration took approximately 10-15 minutes and most respondents completed the interview once it had started.

Tulip Time staff reported that the Asian population was underreported in the 2015 economic impact study. In order to accurately capture this subset of the attending population, six (6) individuals of Indian ethnicity volunteered to help collect data from this group. Commonalities between interviewer and respondent usually boost response rates, breaking down communication barriers and easing anxiety.<sup>1</sup>

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<sup>1</sup> The Politics of Race. Ivor Crewe. Routledge, 2015

Overall 557 completed surveys were completed. The percentage of the total completed surveys at each site are indicated in the graph below.



### *Population Estimates*

The Frost Research Center used data from the visitor survey to estimate total visitor day counts for the 2018 Tulip Time festival. The research team used the proportion of attendees that indicated they had or will be purchasing a ticket to Windmill Island Gardens as well as the actual number of tickets purchased to calculate an estimate of overall festival visitors.

The Frost Research Center used actual participant counts supplied by Tulip Time to calculate the festival participant counts.

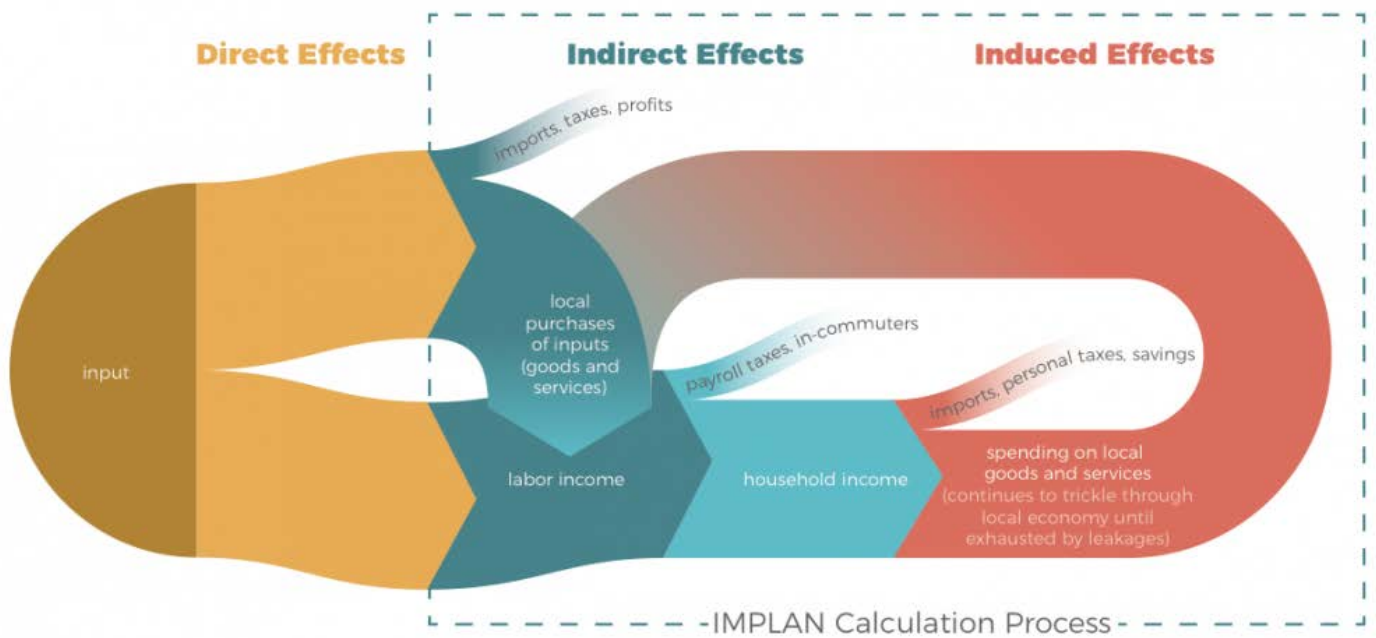
### *Economic Impact*

Economic impact estimates were calculated using an input-output model. These models use direct spending counts to estimate changes in total economic activity such as employment, effects on multiple industries, and spillover impacts from employees spending income.<sup>2</sup>

The Frost Research Center modeled the economic impact from the 2018 Tulip Time festival using IMPLAN which estimates indirect and induced effects based on the direct effects of the economic activity.

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<sup>2</sup> IMPLAN



*Direct* effects are the initial change in the economy due to spending. *Indirect* (business to business purchases) effects are the changes in income, sales, or jobs in sectors within the region that supply goods and services to the tourism sectors. *Induced* effects are the response by an economy to the direct effects through respending income generated from the direct effects. With each phase, some money is leaked out of the model through taxes, personal savings and profits. This analysis accounts for all effects of the Tulip Time Festival in Ottawa County.

## Survey Results

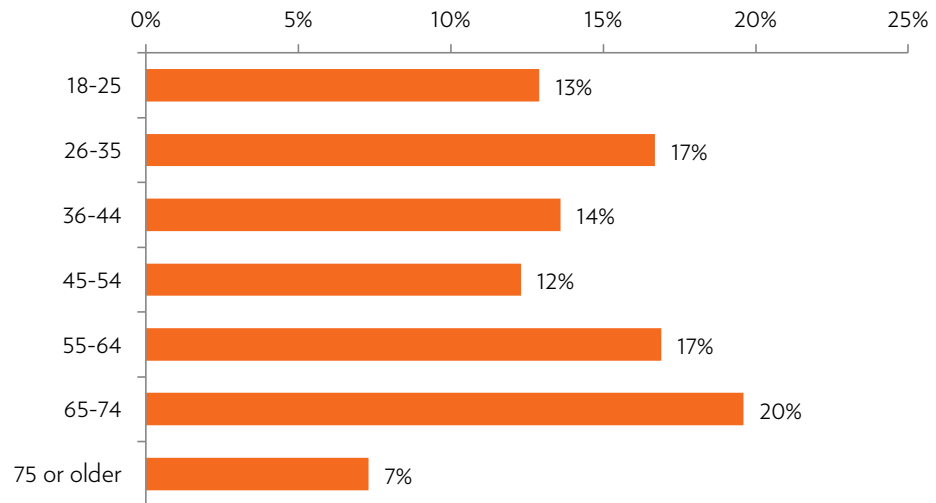
The following section outlines the results of the data collected by the researchers during the Tulip Time Festival, including visitor demographics, spending habits and activities attended during the festival.

### *Visitor Demographics*

#### *Age*

Survey respondents spanned all age groups. Ages 65-74 was the most common age group with twenty percent (20%) of all visitors falling within this category. Seventy percent of visitors were ages 26-35 and 55-64. Only seven (7%) of respondents were 75 years or older.

## Respondent Age (n=551)



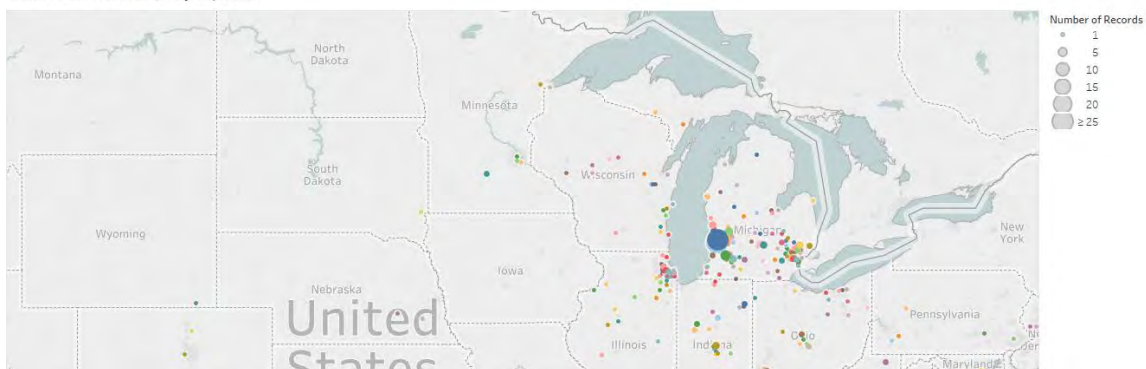
### Zip Code

The following maps demonstrate survey respondent ZIP codes. The size of the dot indicates a greater number of respondents from that particular ZIP code. The most frequently reported zip codes were from the Holland area: 49424 (74), 49423 (68), and 49464 (20).

Attendees by Zipcode



Midwest Attendees by Zipcode



### Local / Non Local

Local and non-local visitors were determined by asking respondents if their permanent residence was within a twenty-minute commute time. The majority (64%) of the visitors were

classified as non-local whereas 36% came from within the Holland area. Percentages of local and nonlocal changed dramatically based on the survey location / venue. The carnival and parade route had the highest percentages of local visitors.

### Permanent Residence within Twenty-Minute Commute (n=555)



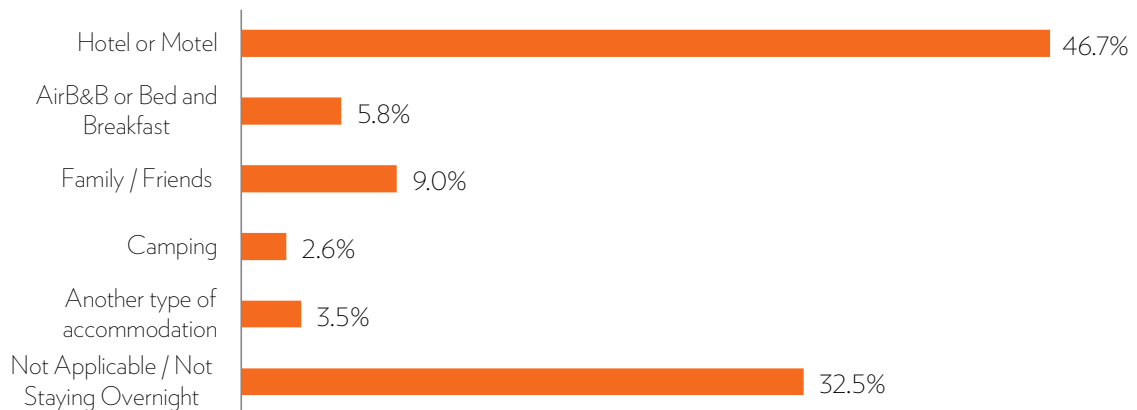
Additional questions regarding motor coach participation and lodging were asked of those that specified their residence was farther than a 20-minute commute. Nearly 90% of out-of-town visitors came without a motor coach group.

### Motor Coach Traveler (n=344)



Nearly half of the out of town guests stayed in a hotel or motel. Many (32.5%) of them were also from more than 20 minutes away but were not planning to stay the night.

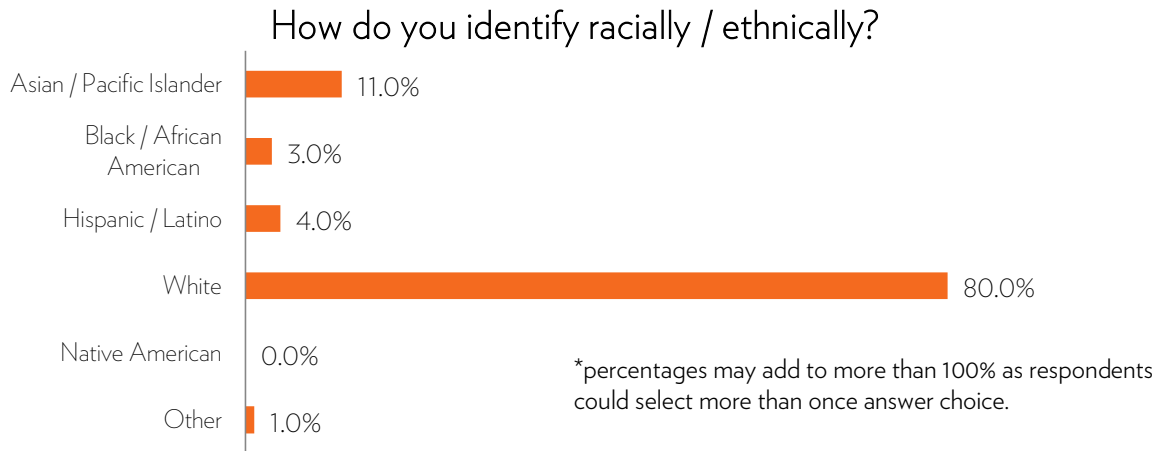
### Accommodation Type (n=345)





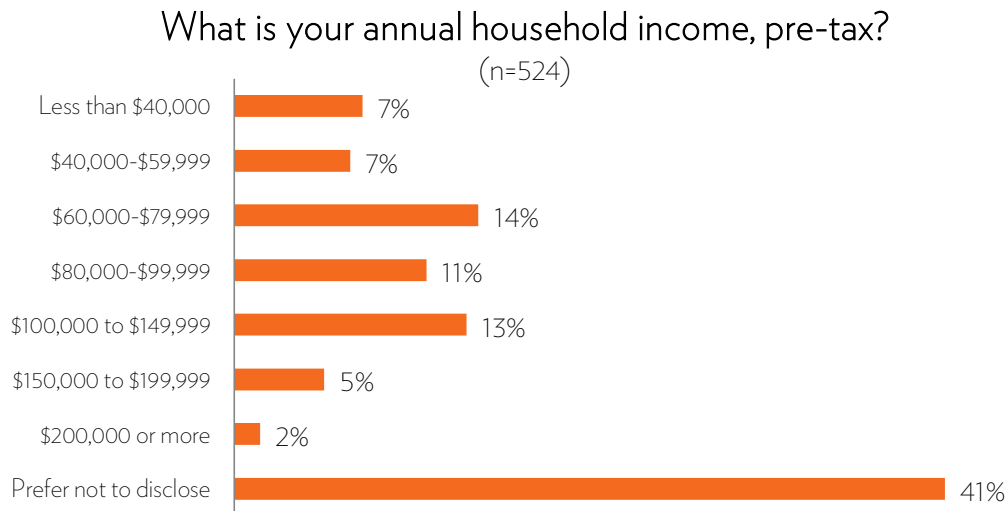
### Racial / Ethnic Identity

The majority (80%) of Tulip Time visitors identify as white. The second most frequent ethnic/racial group was Asian, which presumably incorporated many ethnic Indians.



### Household Income

Over 40% of respondents choose not to disclose their annual household income. Of those that did, the income ranges varied but most respondents fell in the middle ranges from \$60,000-\$150,000 per year.



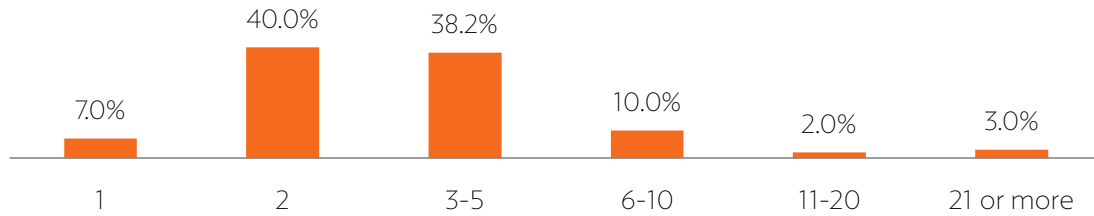
### Visitor Reports

#### Party Members

The majority of visitors were part of small parties. Nearly 80% came from party sizes of 2-5. Seven percent (7%) were traveling alone.

## Number of Adults and Children in the Party

(n=552)



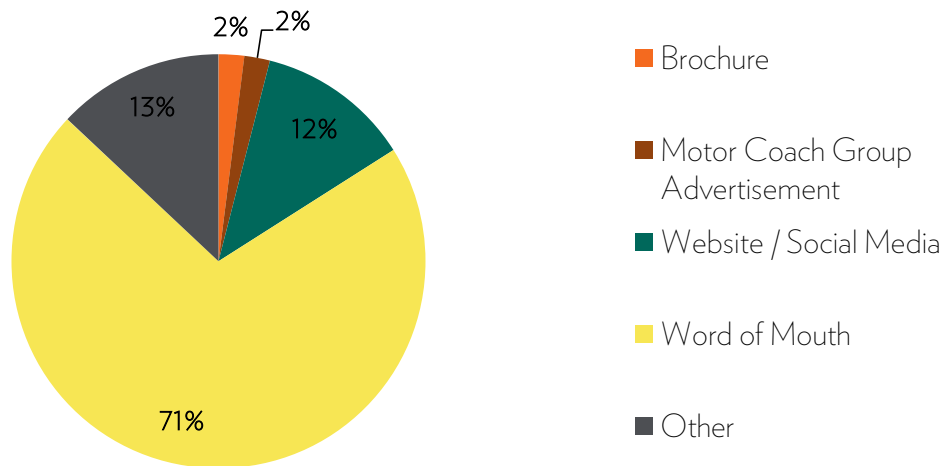
### *Tulip Time Awareness*

The overwhelming majority (71%) of visitors indicated they had learned about Tulip Time through word of mouth. Websites and social media accounted for 12% of visitors' knowledge whereas only two percent (2%) indicated they had learned about Tulip Time through brochures or motor coach group advertisements.

Other responses (13%) typically indicated some long-term relationship with Holland and their associated knowledge of the festival. Some cited they are Hope Alumni, they grew up in the area or they have been life-long visitors. A few others reported they learned of Tulip Time from other marketing campaigns such as Pure Michigan, or advertisements in magazines.

## How Visitors First Heard of Tulip Time

(n=550)

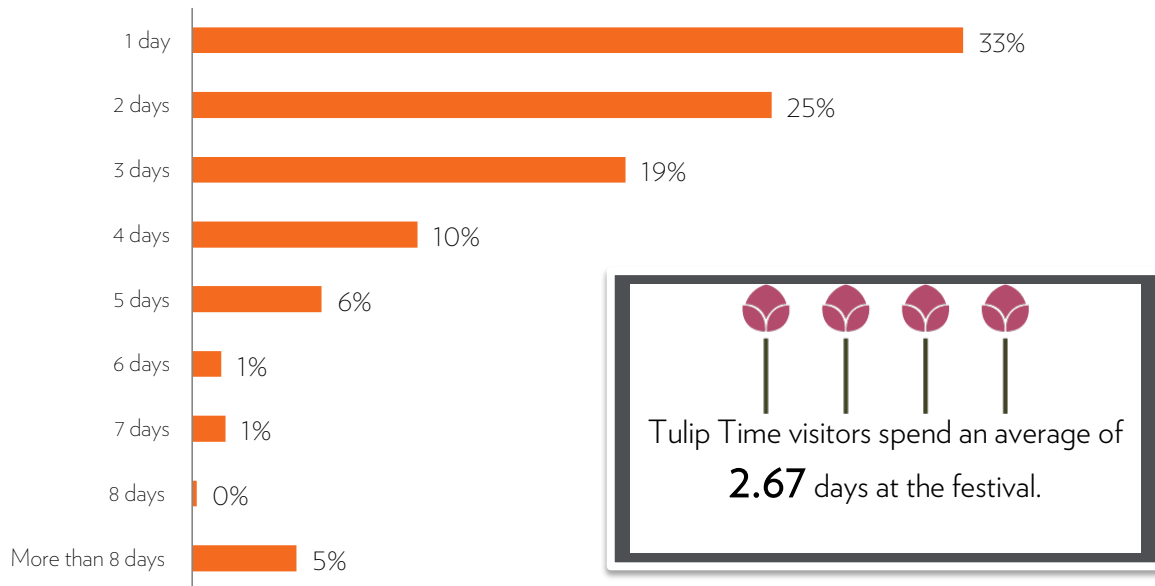


### *Visitor Habits*

Visitors most commonly stayed one (1) day at the festival and more than three-quarters (77%) of visitors stayed between one and three days. The average amount of time spent at Tulip Time for all visitors is 2.67 days.

## Time Spent at Tulip Time in 2018

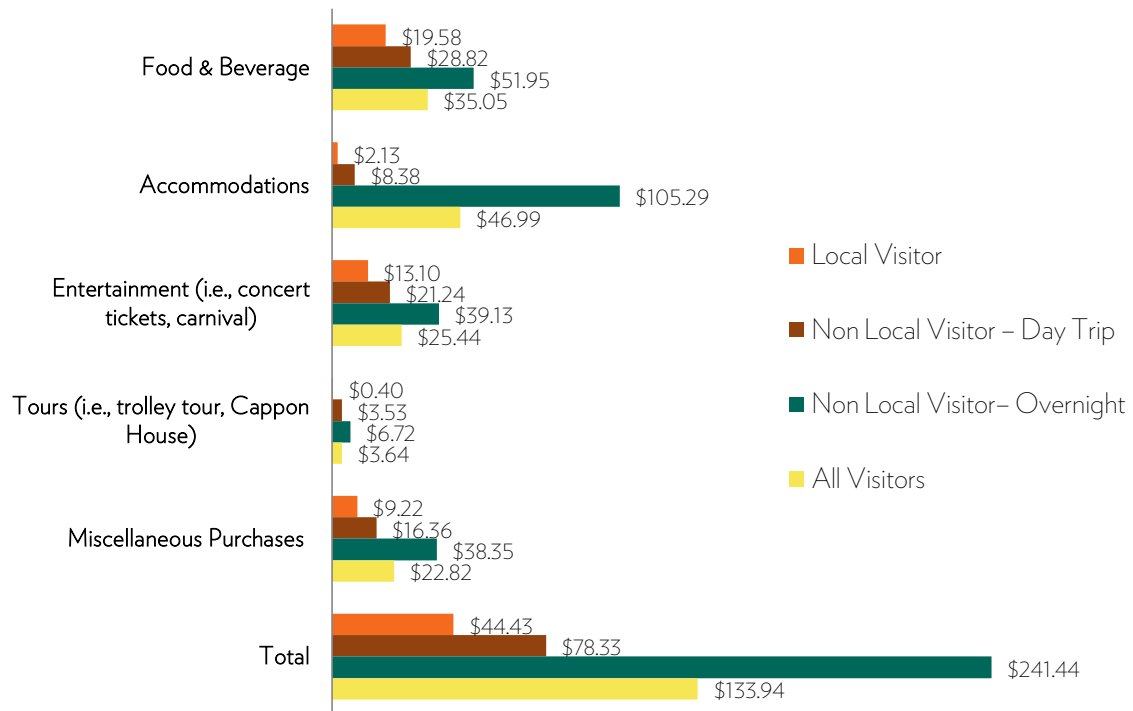
(n=554)



### *Spending*

Spending on food & beverage and accommodations were most often the two largest expenses for overnight visitors. The largest spending categories for local visitors were food & beverage and entertainment. Overall, overnight non-local visitors spent an average of \$241.44 per person per day whereas local and non-local day trip visitors spent \$44.43 and \$78.33, respectively.

## Spending by Visitor Type (Per Person / Day)



Tulip Time visitors most often visit food trucks / festival wagons and full service restaurants. Only 25% of respondents reported using take-out / quick dining establishments.

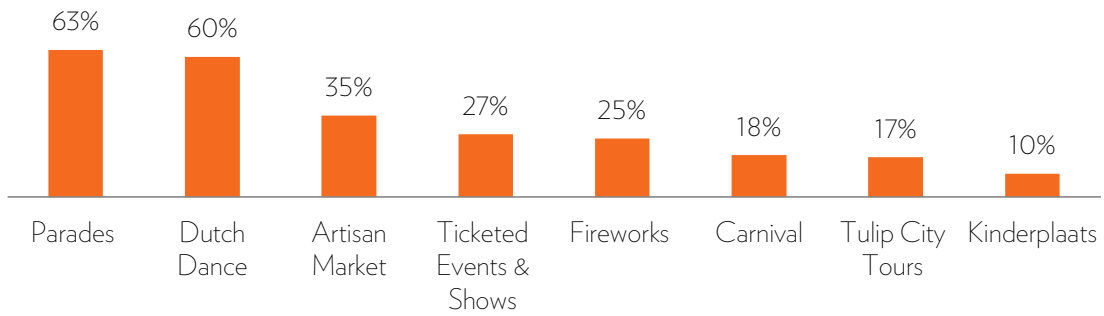
Types of Food Purchases	% of visitors that reported purchasing from...
Full service restaurants	47%
Take-out / Quick dining	25%
Food trucks / festival wagons	50%

### Visitor Activities

Parades and Dutch dance were the two most commonly attended Tulip Time activities with over sixty percent (60%) of respondents reporting they did or were planning to attend.

## Tulip Time Visitor Activities

(n=560)

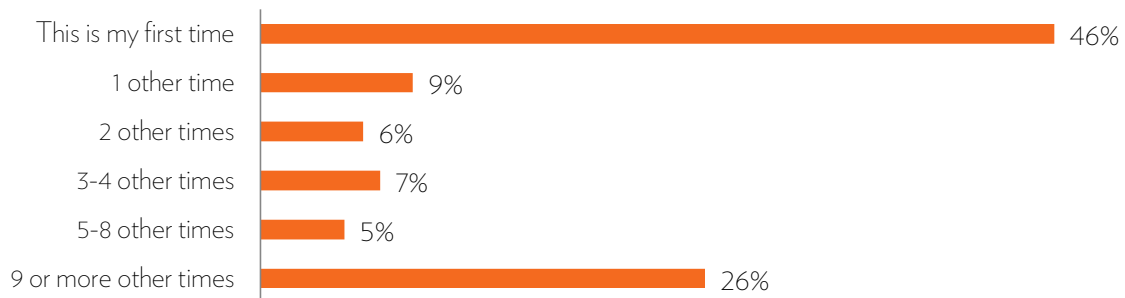


### *Previous Visits*

The number of previous Tulip Time visits was multimodal, with nearly three quarters of respondents reporting this was their first visit (46%) or that they had previously visited 9 or more times (26%).

## Tulip Time Visits

(n=552)



### *Likeliness to Recommend*

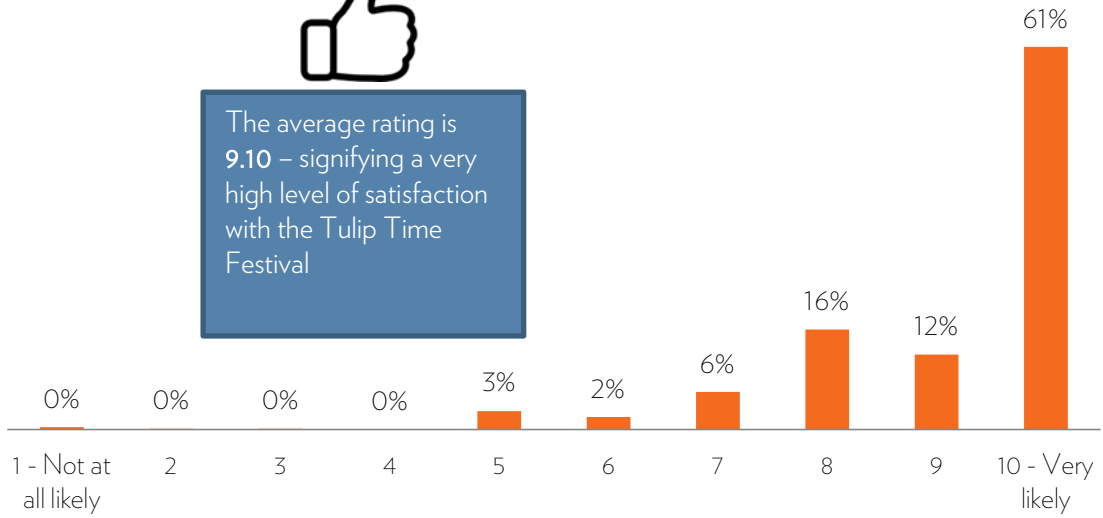
Respondents have a very favorable view of the Tulip Time Festival. Sixty-one percent (61%) of visitors would be extremely likely to recommend Tulip Time to a friend or family member. When comparing these results on a net promotor scale, 73% of Tulip Time visitors would promote Tulip Time, 22% would be passive and neither promote nor detract and only five percent (5%) of visitors would detract from the festival.

## Likelihood to Recommend Tulip Time

(n=550)



The average rating is **9.10** – signifying a very high level of satisfaction with the Tulip Time Festival

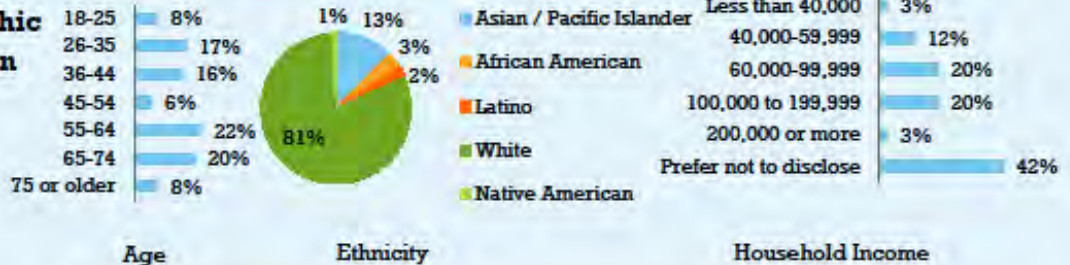


## Site Specific Data

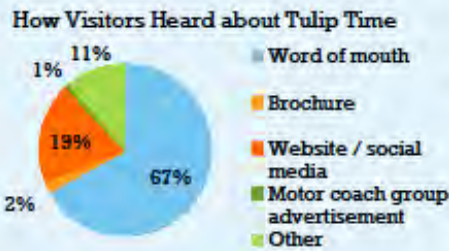
# Windmill Island

Tulip Time Survey Results (N=87)

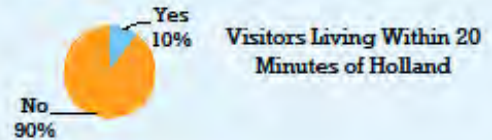
### Demographic Information



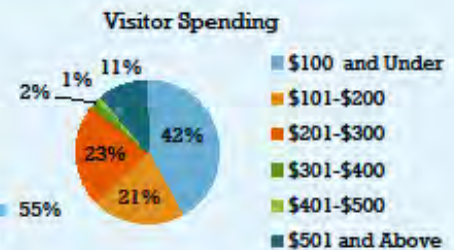
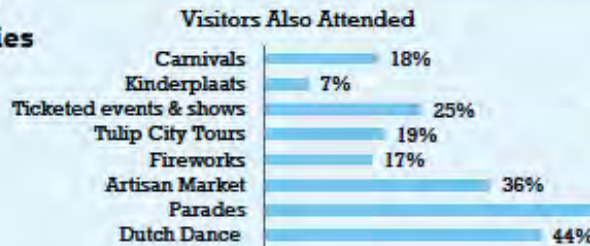
### Visitor Reports



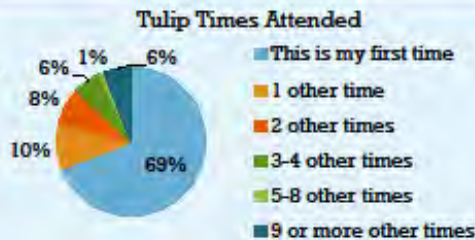
- Visitor Accommodations**
- Hotel or Motel (50%)
  - AirB&B or Bed and Breakfast (3%)
  - Staying with family or friends (5%)
  - Camping (3%)
  - Another type of accommodation (6%)
  - Not Applicable/ Not Staying Overnight (33%)



### Visitor Activities



### Visitor Satisfaction



**2.14 Days**

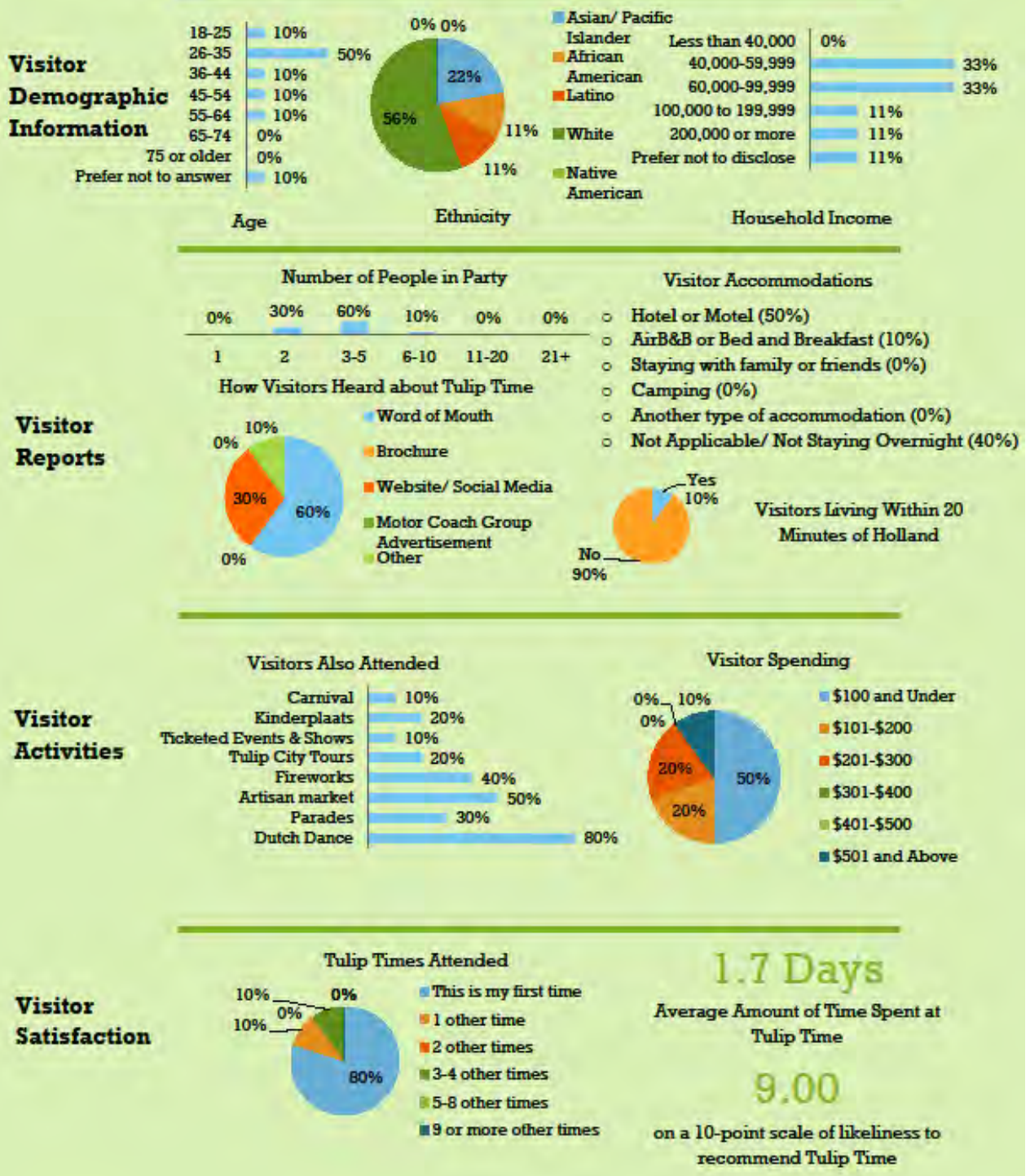
Average Amount of Time Spent at Tulip Time

**9.00**

on a 10-point scale of likeliness to recommend Tulip Time

# Dutch Village

Tulip Time Survey Results (N=10)





## Attendance Estimates

The Frost Research Center used a proportion of survey respondents that attended Windmill Island Gardens (WIG) to help estimate overall attendance numbers. The number of Windmill Island Garden tickets sold was one of the few definitive numbers collected during the festival which was used to determine the ratio of visitors to visitors that purchased a ticket to WIG. For each ticket purchased to WIG, 2.69 visitors attended Tulip Time.

Survey Estimates	
Total visitors in survey sample <sup>3</sup>	1,336
Total Windmill Island Garden Tickets purchased by sample <sup>4</sup>	497
<b>Ratio of Visitors to Purchased WIG Tickets</b>	<b>2.69</b>
Total WIG tickets sold <sup>5</sup>	49,510
<b>Estimated Total Visitors</b> (Total WIG tickets sold * Ratio of Visitors to purchased WIG tickets)	<b>133,182</b>

The proportion of attendees and average days of attendance was determined by data from the visitor survey. Based on WIG ticket sales and visitor survey data, the overall number of attendee days was 355,595.

Visitor Type	Proportion of Attendees <sup>6</sup>	Estimated Visitors	Average Days of Attendance <sup>7</sup>	Attendee Days
Local Visitor	36%	47,946	3.35	160,619
Non Local Visitor – Day Trip	21%	27,968	1.23	34,401
Non Local Visitor – Overnight	43%	57,268	2.76	158,060
<b>All Visitor Average</b>	<b>100%</b>	<b>133,182</b>	<b>2.67</b>	<b>355,595</b>

Note: Local Visitors are defined as those within a 20 minute commute to the festival. Non Local Visitors are all others outside that range.

Participant data was provided by Tulip Time personnel. The average number of participation days varied based on the participant type. Overall, the Frost Research Center estimated 23,120 participant attendee days.

Participant Type <sup>8</sup>	Estimated Visitors	Average Days of Attendance	Attendee Days
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<sup>3</sup> Q4 on Visitor Survey

<sup>4</sup> Q 3 on Visitor Survey

<sup>5</sup> Data provided by Tulip Time

<sup>6</sup> Q6 and Q9 on Visitor Survey

<sup>7</sup> Q10 on Visitor Survey

<sup>8</sup> Data provided by Tulip Time

Dutch Dancers	730	7	5,110
Tulip Time Runners	3518	1	3,518
Volunteers	1089	4	4,356
Week-long Venders (Concessions, Marketplatz,)	37	9	333
Weekend Market Venders (Artisan Market, Mother's Day)	252	2	504
Parade Participants	9,380	1	9,380
<b>Total</b>			<b>23,201</b>

Visitor attendee days and participant attendee days totaled to 378,715. This is a duplicated estimate of the number of attendees to the 2018 Tulip Time Festival.

Attendee Type	Attendee Days
All Visitors	355,595
All Participants	23,201
<b>Total</b>	<b>378,796</b>

## Economic and Fiscal Impacts of the Tulip Time Festival

### Direct Operating Expenses

Tulip Time’s total operating expenses were \$1,666,194.71. Based on the Frost Research Center analysis of the operating expenses, approximately \$847,282 of the expenses were paid to employees or merchants within the Holland area.

Tulip Time Expenditures <sup>9</sup>	(\$)
Salaries, wages and benefits	571,600
Expenses to Holland Area	
Printing	85,053
Food and Beverage	134,754
Rental Space and Equipment	162,322
Licenses and Fees	2,810
Local Security	13,476
Supplies – Local Retailer	5,047
Utilities	3,976
Subtotal	407,438
<b>Total</b>	<b>\$949,038</b>

### Direct Visitor Expenses

The estimated daily spending is based on averages for each visitor type from the visitor survey. Expectedly, local visitors reported spending the least amount per day whereas non-local overnight visitors spent considerably more per attendance day. On average, visitors spent \$133.94 they otherwise would not have per day of attendance.

Spending Category <sup>10</sup>	Visitor Type			All Visitors
	Local Visitor	Non Local Visitor – Day Trip	Non Local Visitor– Overnight	
Food & Beverage	\$19.58	\$28.82	\$51.95	\$35.05
Accommodations	\$2.13	\$8.38	\$105.29	\$46.99
Entertainment	\$13.10	\$21.24	\$39.13	\$25.44
Tours	\$.40	\$3.53	\$6.72	\$3.64
Miscellaneous Purchases	\$9.22	\$16.36	\$38.35	\$22.82
<b>Total</b>	<b>\$44.43</b>	<b>\$78.33</b>	<b>\$241.44</b>	<b>\$133.94</b>

<sup>9</sup> Data provided by Tulip Time

<sup>10</sup> Spending Category and Visitor Type: Q6, Q9 and Q11 on Visitor Survey

The total spending by visitor type was determined by the number of attendee days and the average spending per visitor. The total visitor spending was nearly \$48,000,000, which was largely spent by non-local overnight visitors.

Spending Category	Visitor Type <sup>11</sup>			
Visitor Type	Proportion of Attendees	Estimated Number of Attendee Days	Average Spending per Visitor per Day <sup>12</sup>	Total Spending by Visitor type <sup>13</sup>
Local Visitor	36%	160,619	\$44.43	\$7,136,302.17
Non Local Visitor – Day Trip	21%	34,401	\$78.33	\$2,694,630.33
Non Local Visitor – Overnight	43%	158,060	\$241.44	\$38,162,006.40
<b>All Visitors</b>	<b>100%</b>	<b>355,595</b>	<b>\$133.94</b>	<b>\$47,628,394.30</b>

### Direct Participant Expenses

Tulip Time participants spent considerably less than visitors at the festival. Overall the largest expense category was food & beverage. Volunteers also reported a higher average amount spent on miscellaneous items than runners or Dutch dancers. On average, participants spent \$33.96 per day of participation.

Spending Category <sup>14</sup>	Participant Type			
	Runner	Dutch Dancer	Volunteer	All Participants
Food & Beverage	\$25.32	\$7.63	\$11.62	\$16.03
Accommodations	\$0.71	\$0.00	\$0.00	\$0.26
Transportation	\$3.55	\$11.50	\$3.92	\$4.69
Miscellaneous Purchases	\$7.14	\$1.00	\$22.38	\$12.98
<b>Total</b>	<b>\$36.72</b>	<b>\$20.13</b>	<b>\$37.92</b>	<b>\$33.96</b>

Tulip Time participants were estimated to have spent nearly \$800 thousand during the festival.

Participant	Estimated Number of Attendee Days	Average spending per participant	Total Spending by participants
<b>All Participants</b>	<b>23,201</b>	<b>\$33.96</b>	<b>\$787,905.96</b>

### Direct Visitor and Participant Expenses

Total visitor and participant expenses are demonstrated in the tables below. These tables indicate the associated sector and total visitor spending within each specific sector type.

<sup>11</sup> Visitor Type on visitor survey

<sup>12</sup> Q11 Visitor survey

<sup>13</sup> Average spending multiplied by attendance days

<sup>14</sup> Spending Category: Q2 and Q4 on Participant Survey; Visitor Type on visitor survey

Visitor Sector Spending <sup>15</sup>	Average Visitor Spending	Specific Sector Type <sup>16</sup>	Total Sector Visitor Spending (\$)
Food & Beverage	\$35.05	Full Service Restaurant	\$5,857,894.23
		Limited service restaurant	\$3,115,901.19
		Other food or drinking places (e.g., food trucks)	\$6,231,802.38
Accommodations	\$46.99	Hotels / Motels / AirBnB / Bed and Breakfast	\$16,709,409.05
Entertainment	\$25.44	Promoters of performing arts and sports and agents for public figures	\$9,046,336.80
Tours	\$3.64	Other amusement and recreation industries	\$1,294,365.80
Miscellaneous Purchases	\$22.82	General Retail Stores	\$8,114,677.90
<b>Total</b>			<b>\$47,628,394.30</b>

Participant Sector Spending <sup>17</sup>	Average Participant Spending	Specific Sector Type <sup>18</sup>	Total Sector Visitor Spending (\$)
Food & Beverage	\$16.03	Limited service restaurant	\$371,912.03
Accommodations	\$2.26	Hotels / Motels / AirBnB / Bed and Breakfast	\$6,032.26
Transportation	\$4.69	Gasoline Retail Stores	\$108,812.69
Miscellaneous Purchases	\$12.98	General Retail Stores	\$301,148.98
<b>Total</b>			<b>\$787,905.96</b>

Visitors and participants were estimated to have spent approximately \$48 million as part of their festival experience.

All Tulip Time Attendees	Estimated Number of Attendee Days	Average Spending per Visitor	Total Spending by Visitor type

<sup>15</sup> IMPLAN Sector Standard IMPLAN categories

<sup>16</sup> Standard IMPLAN sector categories

<sup>17</sup> IMPLAN




<sup>18</sup> Standard IMPLAN sector categories

All Participants	23,201	\$33.96	\$787,905.96
All Visitors	355,595	\$133.94	\$47,628,394.30
<b>Total</b>	<b>378,715</b>		<b>\$48,416,300.26</b>

### Festival Visitors Total Economic Impacts

The \$48 million of local and visitor spending translated into \$44,938,645 of direct effect and approximately \$11 million of additional sales for Ottawa County businesses through indirect spending<sup>19</sup>. The spending of wages earned from Tulip Time created an induced effect of \$18,890,725. The total economic impact of tourism to the Tulip Time Festival was approximately \$74,822,108. The 2018 Tulip Time Festival supported 873 jobs in Ottawa County for a total of \$21,566,961 in labor income.

Impact Type <sup>20</sup>	Employment	Labor Income (\$)	Value added (\$)	Output (\$)
Direct Effect	580.70	12,659,991	22,909,093	44,938,645
Indirect Effect	128.16	3,502,704	5,395,969	10,992,738
Induced Effect	165.08	5,404,267	10,625,089	18,890,725
<b>Total Effect</b>	<b>873.94</b>	<b>21,566,961</b>	<b>38,930,151</b>	<b>74,822,108</b>

What does this mean for the Holland area?		
Direct Effects	Indirect Effects	Induced Effects
		
<p><b>\$48 M</b> spent during festival leading to <b>\$44.9 M</b> direct effects</p> <p>\$44.9 M is the direct spending for restaurants concerts, hotel stays, tours, and miscellaneous items with some retail margins withheld from total spending</p>	<p><b>\$11 M</b> from local businesses to other businesses or employee compensation</p> <p>Business to business or labor income expenditures</p>	<p><b>\$18.8 M</b> respending of labor income on local goods and services</p>
Local Example		
<p>Jane attends Tulip Time and stays in a local hotel for 3 nights. She estimates spending \$300/day on accommodations, food &amp; beverages, and concert tickets. She is responsible for \$900 spent</p>	<p>Because of Jane's initial spending, the local hotel is able to pay their employees and order necessary supplies. Local restaurants pay for ingredients at the Farmer's market.</p>	<p>The local hotel employees pay for their groceries at a local grocery store. Local farmers are able to pay for farm supplies needed for the next growing season.</p>

<sup>19</sup> IMPLAN

<sup>20</sup> IMPLAN

at the festival and nearly that amount in direct effects.		
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**Tax Revenue**

The increase in economic activity due to visitor and participant spending at the Tulip Time festival also produces increased tax revenue on a local and federal level. The table below estimates tax revenue for each geography and in each taxation category. The local totals sum county, sub county, sub county special and state estimates. Spending from the Tulip Time festival generates nearly a half a million dollars (\$442,471) in tax revenue for Ottawa County.<sup>21</sup>

Tax Revenue <sup>22</sup>	Employee Compensation	Proprietor Income	Tax on Production and Imports	Households	Corporations	Total
Local (sum of county, sub county, sub county special and state)	\$794	\$0	\$6,958,605	\$498,214	\$63,633	<b>\$7,521,246</b>
Federal	\$2,277,528	\$128,016	\$1,037,617	\$1,557,429	\$618,364	<b>\$5,618,954</b>
Ottawa County	\$0	\$0	\$440,459	\$1,574	\$438	<b>\$442,471</b>
Sub County General (municipalities)	\$0	\$0	\$735,943	\$12,597	\$2,961	<b>\$751,501</b>
Sub County (Special Districts) (school districts, fire districts)	\$0	\$0	\$1,875,717	\$6,709	\$1,109	<b>\$1,883,535</b>
State	\$794	\$0	\$3,906,487	\$477,334	\$59,125	<b>\$4,443,740</b>

**Tulip Time Operations Total Economic Impacts**

Tulip Time operational expenses also created economic impact in the Holland area. Adding the total effects of the visitor spending and the operations could possibly result in counting some expenses twice. In order to prevent this from occurring, the effects of the operations expenses and the Tulip Time visitors spending were run separately. Tulip Time’s total operational expenses were \$1,666,194.71. Tulip Time employs approximately 12 FTE throughout the year. The labor income and value added is the total paid to employees in both wages and benefits, \$571,600. The total impact of Tulip Time’s operational expenses were \$2.9 million.

Impact Type <sup>23</sup>	Employment	Labor Income (\$)	Value added (\$)	Output (\$)
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<sup>21</sup> Based on IMPLAN calculations and estimates  
<sup>22</sup> IMPLAN  
<sup>23</sup> IMPLAN

Direct Effect	12.0 <sup>24</sup>	571,600	571,600	1,666,194
Indirect Effect	2.29	61,064	93,868	493,374
Induced Effect	6.46	211,628	415,881	739,685
<b>Total Effect</b>	<b>20.75</b>	<b>844,292</b>	<b>1,081,349</b>	<b>2,899,254</b>

### *Tax Revenue*

Tax revenue of Tulip Time operations does not include many categories because of the organization's 501(c)(3) status. Overall local spending produced local tax revenue of \$13,075

<b>Tax Revenue Direct Effects</b> <sup>25</sup>	Employee Compensation	Proprietor Income	Tax on Production and Imports	Households	Corporations	<b>Total</b>
Local (sum of county, sub county, sub county special and state)	24			13,051		<b>13,075</b>
Federal	69,668			40,796		<b>110,464</b>
Ottawa County				41		<b>41</b>
Sub County General (municipalities)				330		<b>330</b>
Sub County (Special Districts) (school districts, fire districts)				176		<b>176</b>
State	24			12,504		<b>12,528</b>

## Conclusion

The Tulip Time festival is an annual tradition that is anticipated every spring by residents, tourists, and businesses. This economic impact study provides a glimpse as to why, besides the charm and rich cultural tradition of the festival, the festival is vital to the Holland area community. This year, the local residents and businesses will be benefiting from the festivals long after tulip season has come and gone. This study provides insight into what aspects of the festival are most widely attended, where visitors are spending their money, and how this money will filter into the city, county and state infrastructure.

As with most economic impact studies, this project is limited by the generalizations and estimates the Frost Research Center made because of the absence of precise attendee and spending numbers. The Frost Research Center made every effort to increase the validity and reliability of the survey data but some error is likely to exist in any survey research.

<sup>24</sup> Data provided by Tulip Time

<sup>25</sup> IMPLAN



This year's findings produced a much larger result than previous economic impact results. A variance in study design and average survey responses may explain the majority of change. The following list details the major differences between the economic impact study conducted in 2015 and results from 2018.

The 2018 study...

- Had an increased number of times and locations of survey administration
- Used trained survey administrators
- Results saw a slight increase in attendee day total
- Results had a dramatic increase in average visitor spending
- Used a more specific spending question (5 categories e.g., food&beverage,, accommodations, tours, entertainment, miscellaneous purchases) which hopefully prompted more accurate recall for visitors.

In addition to varied project design, additional community factors such as a healthier economy and increased visitor disposable income may also be at play.

## Appendix I – Data Tables – All Data

### Q1 Survey Location

	Frequency	Percent
8th Street	102	18.3
Artisan Market	8	1.4
Carnival (Entrance)	33	5.9
Centennial Park (apart from Dutch dance / fair)	2	.4
Dutch Marktplaats	44	7.9
Dutch Village	11	2.0
Evergreen Commons	22	3.9
Fireworks	0	0.0
Hope Food Venders	23	4.1
Kinderplaats	7	1.3
Mother's Day Market	2	0.4
Parade Route	38	6.8
Ticketed Show	53	9.5
Tulip Time Office	67	12.0
Window on the Waterfront	37	6.6
Windmill Island	88	15.8
Veldheer's	20	3.6

### Q2 Have you / do you intend to purchase a ticket / wristband for the following?

	Yes (# / %)	No (# / %)
Carnival	74 (13.3%)	484 (86.7%)
Dutch Village	132 (23.7%)	426 (76.3%)
Veldheer's Tulip Garden	191 (34.1%)	367 (65.8%)
Windmill Island Gardens	292 (52.3%)	266 (47.7%)
Tulip City Tours	86 (15.6%)	466 (84.4%)

### Q3 How many total tickets / wristbands will you / have you purchased for your party?

	Mean	Standard Deviation
Carnival	3.0	1.44
Dutch Village	4.43	7.36
Veldheer's Tulip Garden	5.66	10.52
Windmill Island Gardens	4.11	7.39
Tulip City Tours	5.28	9.9

### Q4 How many adults & how many children (including yourself) are in your party while attending Tulip Time?

	Mean	Standard Deviation
Adults	4.08	7.73
Children	.59	1.24
Total	4.67	7.73

Q5 I am going to list off some Tulip Time events. Could you tell me if you plan to attend or have attended each?

	Frequency	Percent
Dutch Dance	338	60.4
Parades	355	63.4
Artisan Market	197	35.2
Fireworks	140	25.0
Tulip City Tours	94	16.8
Ticketed Events and Shows	151	27.0
Kinderplaats	58	10.4
Carnival	98	17.5

Q6 Is your permanent residence within a 20 minute commute to Holland?

	Frequency	Percent
Yes	201	36.2
No	354	63.8
Total	555	100

Q7 Did you come to Tulip Time with a motor coach group?

	Frequency	Percent
Yes	39	11.3
No	305	88.7
Total	344	100

Q8 Was Tulip Time your primary reason for your visit?

	Frequency	Percent
Yes, I came for Tulip Time	39	88.1
No, I would be here anyways	305	11.9
Total	345	100

Q9 In which type of accommodation are you staying?

	Frequency	Percent
Hotel or motel	161	46.7
AirB&B or Bed and Breakfast	20	5.8
Staying with family or friends	31	9.0
Camping	9	2.6
Another type of accommodation	12	3.5
Not applicable / Not staying overnight	112	32.5

Q10 How much time do you anticipate spending at Tulip Time this year?

	Frequency	Percent
1 day	185	33.4
2 days	139	25.1
3 days	104	18.8
4 days	54	9.7
5 days	31	5.6
6 days	7	1.3
7 days	8	1.4

8 days	1	.2
More than 8 days	25	4.5
Total	554	100.0
Mean	2.67	

Q11 I am going to list off 5 categories, and for each one can you tell me, how much you are spending / are you planning to spend per person, per day that you wouldn't be otherwise?

	Mean	Standard Deviation
Food	35.05	46.72
Entertainment	25.44	40.21
Tours	3.64	12.39
Accommodations	46.99	91.52
Souvenirs (Miscellaneous purchases)	22.82	49.99

Q12 Which type of food purchases did / will you make? [select all that apply]

	Frequency	Percent
Full service restaurant	264	47.1
Take-out / quick dining	137	24.5
Food truck / festival wagons	278	49.6

Q13 How many times have you visited Tulip Time?

	Frequency	Percent
This is my first time	264	46.4
1 other time	137	8.9
2 other times	278	6.2
3-4 other times	264	7.2
5-8 other times	137	4.9
9 or more other times	278	26.4
Total	552	100.0

Q14 How did you first hear about Tulip Time?

	Frequency	Percent
Word of mouth	390	70.9
Brochure	13	2.4
Website / social media	64	11.6
Motor coach group advertisement	10	1.8
Other	73	13.3
Total	550	100.0

Other TEXT:

- Advertisement
- Attended Hope
- Because of Texas Tenors
- Billboard
- Business
- Dad's Dutch
- Family
- Flyers
- From here (2)
- Friends
- Girlfriend
- Hope College (2)
- Hope College student (2)
- I live here (12)
- Life
- Lifetime goer
- Live in Michigan
- Lived here
- Lived here whole life
- Magazine
- Mother and father
- Moved here
- Paper
- Pure MI
- The newspaper
- TV
- TV news
- Workers
- Working Tulip Time

Q15 On a scale of 1 to 10 with 1 "not at all likely" and 10 "very likely," How likely are you to recommend Tulip Time to a friend?

	Frequency	Percent
1 - Not at all likely	2	.4
2	1	.2
3	1	.2
4		
5	14	2.5
6	13	2.4
7	33	6.0
8	88	16.0
9	64	11.6
10 - Very likely	334	60.7

Total	550	100.0
Mean	9.10	

**Q16 Would you mind telling me your age or pointing to your age range?**

	Frequency	Percent
18-25	71	12.9
26-35	92	16.7
36-44	75	13.6
45-54	68	12.3
55-64	93	16.9
65-74	108	19.6
75 or older	40	7.3
Prefer not to answer	4	.7

**Q18 How do you identify racially / ethnically? [ Select all that apply]**

	Frequency	Percent
Asian / Pacific Islander	61	10.9
Black / African American	17	3.0
Latino / Hispanic	22	3.9
White	450	80.4
Native American	1	.2
Other	4	.7

**Q19 Will you select your annual household income, pre-tax?**

	Frequency	Percent
Less than 40,000	39	7.4
40,000-59,999	35	6.7
60,000-79,999	74	14.1
80,000-99,999	58	11.1
100,000 to 149,999	70	13.4
150,000 to 199,999	27	5.2
200,000 or more	8	1.5
Prefer not to disclose	213	40.6
Total	524	100.0

## Appendix II – Visitor Survey

# Tulip Time 2018 Survey - Personally Administered

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### Start of Block: Default Question Block

#### Q1 Survey Location (don't ask respondent)

- Artisan Market (12)
- Carnival (Entrance) (1)
- Centennial Park (apart from dutch dance / fair) (4)
- Dutch Marktplaats (16)
- Dutch Village (7)
- Evergreen Commons (2)
- Fireworks (10)
- Hope Food Venders (11)
- Kinderplaats (15)
- Mother's Day Market (17)
- Parade Route (3)
- Ticketed Show (9)
- Tulip Time Office (13)
- Window on the Waterfront (8)
- Windmill Island (5)
- Veldheer's (6)
- 8th Street (24)
- Arts Council (25)

---

Page Break

Q2 Have you / do you intend to purchase a ticket / wristband for the following?

	Yes (1)	No (2)
Carnival (1)	<input type="radio"/>	<input type="radio"/>
Dutch Village (2)	<input type="radio"/>	<input type="radio"/>
Veldheer's Tulip Garden (3)	<input type="radio"/>	<input type="radio"/>
Windmill Island Gardens (4)	<input type="radio"/>	<input type="radio"/>
Tulip City Tours (5)	<input type="radio"/>	<input type="radio"/>

Q3 How many total tickets / wristbands will you / have you purchased for your party?

Have you / do you intend to purchase a ticket / wristband for the following? = Carnival [ Yes ]

Carnival (1) \_\_\_\_\_

Have you / do you intend to purchase a ticket / wristband for the following? = Dutch Village [ Yes ]

Dutch Village (2) \_\_\_\_\_

Have you / do you intend to purchase a ticket / wristband for the following? = Veldheer's Tulip Garden [ Yes ]

Veldheer's Tulip Garden (3) \_\_\_\_\_

Have you / do you intend to purchase a ticket / wristband for the following? = Windmill Island Gardens [ Yes ]

Windmill Island Gardens (4) \_\_\_\_\_

Have you / do you intend to purchase a ticket / wristband for the following? = Tulip City Tours [ Yes ]

Tulip City Tours (5) \_\_\_\_\_

Q4 How many adults & how many children (including yourself) are in your party while attending Tulip Time?

Adults (1) \_\_\_\_\_

Children (2) \_\_\_\_\_



Q5 I am going to list off some Tulip Time events. Could you tell me if you plan to attend or have attended each?

- Dutch Dance (1)
  - Parades (2)
  - Artisan Market (3)
  - Fireworks (4)
  - Tulip City Tours (5)
  - Ticketed events & shows (6)
  - Kinderplaats (7)
  - Carnival (8)
- 

Q6 Is your permanent residence within a 20 minute commute to Holland?

- Yes (1)
  - No (2)
- 

**Display This Question:**

**If Is your permanent residence within a 20 minute commute to Holland? = No**

Q7 Did you come to Tulip Time with a motor coach group?

- Yes (1)
  - No (2)
- 

**Display This Question:**

**If Is your permanent residence within a 20 minute commute to Holland? = No**

Q8 Was Tulip Time your primary reason for your visit?

- Yes, I came for Tulip Time (1)
  - No, I would be here anyways (2)
- 

**Display This Question:**

**If Is your permanent residence within a 20 minute commute to Holland? = No**

Q9 In which type of accommodation are you staying?

- Hotel or motel (1)
  - AirB&B or bed and breakfast (2)
  - Staying with family or friends (3)
  - Camping (4)
  - Another type of accommodation (5)
  - Not applicable / Not staying overnight (6)
- 



Q10 How much time do you anticipate spending at Tulip Time this year?

- 1 day (1)
  - 2 days (2)
  - 3 days (3)
  - 4 days (4)
  - 5 days (5)
  - 6 days (6)
  - 7 days (7)
  - 8 days (8)
  - more than 8 days (9)
- 

Q11 I am going to list off 5 categories, and for each one can you tell me, how much you are spending / are you planning to spend per person, per day that you wouldn't be otherwise?

[enter only whole numbers]

- Food (1) \_\_\_\_\_
- Entertainment (2) \_\_\_\_\_
- Tours (3) \_\_\_\_\_
- Accommodations (4) \_\_\_\_\_
- Souvenirs (Miscellaneous purchases) (5) \_\_\_\_\_

---

**Display This Question:**

If I am going to list off 5 categories, and for each one can you tell me, how much you are spending... Food Is Greater Than 0

Q12 Which type of food purchases did / will you make? [select all that apply]

- Full service restaurant (1)
  - Take-out / quick dining (2)
  - Food truck / festival wagons (3)
- 

Q13 How many times have you visited Tulip Time?

- This is my first time (1)
  - 1 other time (2)
  - 2 other times (3)
  - 3-4 other times (4)
  - 5-8 other times (5)
  - 9 or more other times (6)
- 

Q14 How did you first hear about Tulip Time?

- Word of mouth (1)
  - Brochure (2)
  - Website / social media (3)
  - Motor coach group advertisement (4)
  - Other (5) \_\_\_\_\_
-

Q15 On a scale of 1 to 10 with 1 "not at all likely" and 10 "very likely," How likely are you to recommend Tulip Time to a friend?

- 1 - Not at all likely (1)
- 2 (2)
- 3 (3)
- 4 (4)
- 5 (5)
- 6 (6)
- 7 (7)
- 8 (8)
- 9 (9)
- 10 - Very likely (10)

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Page Break

Q16 Would you mind telling me your age or pointing to your age range?

- 18-25 (1)
  - 26-35 (2)
  - 36-44 (3)
  - 45-54 (4)
  - 55-64 (5)
  - 65-74 (6)
  - 75 or older (7)
  - Prefer not to answer (8)
- 

Q17 What is your ZIP code?

\_\_\_\_\_

---

Q18 How do you identify racially / ethnically?

- Asian / Pacific Islander (1)
  - Black / African American (2)
  - Latino / Hispanic (3)
  - White (4)
  - Native American (5)
  - Other (6) \_\_\_\_\_
- 

Page Break

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Q19 Will you select your annual household income, pre-tax? (let them select & end the survey for privacy reasons)

- Less than 40,000 (1)
- 40,000-59,999 (2)
- 60,000-79,999 (3)
- 80,000-99,999 (4)
- 100,000 to 149,999 (5)
- 150,000 to 199,999 (6)
- 200,000 or more (7)
- Prefer not to disclose (8)

**End of Block: Default Question Block**

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# Tulip Time Participant Survey

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Start of Block: Default Question Block

Q1 Survey Site

- Boatwerks (1)
  - Parade Route Lineup (2)
  - Centennial Park (3)
  - 8th Street (4)
- 

Page Break

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Q2 What are you currently participating in?

- Runner (1)
  - Dutch Dancer (2)
  - Volunteer (3)
- 

Q3 How many days of Tulip Time are participating in?

- 1 Day (1)
  - 2 Days (2)
  - 3 Days (5)
  - 4 Days (3)
  - 5 Days (6)
  - 6 Days (4)
  - 7 Days (7)
  - More than 7 days (8)
- 

Q4 How much on average are you spending each day?

Please use whole numbers to fill in the following.

Food: \_\_\_\_\_ (1)

Transportation: \_\_\_\_\_ (2)

Lodging: \_\_\_\_\_ (3)

Merchandise: \_\_\_\_\_ (4)

Total: \_\_\_\_\_

End of Block: Default Question Block