



# **OTRONICON V.5**

**@ Orlando Science Center**

## **2010 Cultural Tourism Audience Research Report**

**Prepared for:  
United Arts of Central Florida, and  
Orange County Arts & Cultural Affairs**

**Written and Delivered by:  
Americans for the Arts  
July 2010**



## DETAILED RESEARCH FINDINGS

**Name of Event (Funded Project):** Otronicon v.5

**Event Dates:** January 15, 2010 through January 18, 2010

**Name of Presenting Organization:** Orlando Science Center

**Total TDT Funding Awarded:** \$100,000

**Project Description:** OTRONICON v.5 builds on the incredible success and momentum created since the inaugural Otronicon in 2006. Otronicon v.5 showcases the convergence of art, science, education, technology and entertainment. Otronicon provides audiences of all ages with hands-on opportunities to explore creative potentialities of electronic games, digital media and simulation. From a festival of short films created by electronic game technology to the latest game formats and technologies, to cutting-edge medical simulators, Otronicon engages, explores and inspires.

EVENT ATTENDANCE	ALL ATTENDEES	Local Attendees	Out-of-Town Attendees	Incremental Attendees
Total Attendance	11,920	8,082	3,838	1,430
Percentage of Total Attendance*	100%	68%	32%	12%
Percentage of Out-of-Town Attendees				37%
Unique Attendance	9,169	6,217	2,952	1,008
Average Size of Travel Party	3.3	3.1	3.9	4
Average Number of Visits Per Attendee	1.3	1.3	1.3	1.4
Median	1	1	1	1
Maximum (reported)	4	4	4	4
Percentage of Attendees with Multiple Visits	24%	25%	22%	28%
Total Number of Audience Surveys Collected	439	351	88	43

\* The percentages of local vs. out-of-town attendees were determined using the ZIP codes of Otronicon ticket purchasers, provided to the project researchers by the Orlando Science Center.

<b>AUDIENCE SPENDING ESTIMATES**</b>	<b>ALL ATTENDEES</b>	<b>Local Attendees</b>	<b>Out-of-Town Attendees</b>	<b>Incremental Attendees</b>
Average Audience Spending (Per Person)	<b>\$11.38</b>	\$8.85	\$21.50	\$21.77
Total Audience Spending	<b>\$154,042</b>	\$71,525	\$82,517	\$31,139
Unique Audience Spending	<b>\$118,488</b>	\$55,020	\$63,468	\$21,944

<b>RETURN-ON-INVESTMENT (ROI) ACHIEVED</b>	<b>ALL ATTENDEES</b>	<b>Local Attendees</b>	<b>Out-of-Town Attendees</b>	<b>Incremental Attendees</b>
Based on TDT Award of \$100,000	<b>\$1.54</b>	\$0.72	\$0.83	\$0.31
ROI Ratio (TDT Award)	<b>2 to 1</b>	<1 to 1	<1 to 1	<1 to 1
Based on Project Budget of \$244,155***	<b>\$0.63</b>	\$0.29	\$0.34	\$0.13
ROI Ratio (Project Budget)	<b>&lt;1 to 1</b>	<1 to 1	<1 to 1	<1 to 1
Based on Marketing Budget of \$55,807***	<b>\$2.76</b>	\$1.28	\$1.48	\$0.56
ROI Ratio (Marketing Budget)	<b>3 to 1</b>	1 to 1	1 to 1	<1 to 1

<b>ECONOMIC IMPACT OF AUDIENCE SPENDING</b>	<b>ALL ATTENDEES</b>	<b>Local Attendees</b>	<b>Out-of-Town Attendees</b>	<b>Incremental Attendees</b>
Full-Time Equivalent (FTE) Jobs Supported	<b>4</b>	2	2	1
Resident Household Income Generated	<b>\$92,000</b>	\$43,000	\$49,000	\$19,000
Local Government Revenue Generated	<b>\$8,000</b>	\$4,000	\$4,000	\$2,000
State Government Revenue Generated	<b>\$13,000</b>	\$6,000	\$7,000	\$3,000

\*\* All estimated audience spending figures exclude the cost of admission to the event, if applicable.

\*\*\* Both the project budget and the marketing budget include cash budget figures only; in-kind contributions are excluded from these analyses.

<b>AUDIENCE DEMOGRAPHICS</b>	<b>ALL ATTENDEES</b>	<b>Local Attendees</b>	<b>Out-of-Town Attendees</b>	<b>Incremental Attendees</b>
<b><u>Gender</u></b>				
Male	<b>61%</b>	61%	57%	65%
Female	<b>39%</b>	39%	43%	35%
<b><u>Age</u></b>				
Younger than 18	<b>42%</b>	44%	34%	39%
18 to 34	<b>26%</b>	25%	29%	31%
35 to 44	<b>19%</b>	19%	19%	11%
45 to 54	<b>10%</b>	8%	14%	17%
55 to 64	<b>4%</b>	4%	3%	2%
65 or Older	<b>1%</b>	1%	2%	1%
<b><u>Ethnicity/Race</u></b>				
Caucasian/White	<b>75%</b>	66%	81%	88%
African American/Black	<b>4%</b>	5%	2%	3%
Hispanic/Latino/Spanish	<b>14%</b>	15%	13%	8%
Other	<b>7%</b>	8%	5%	1%
<b><u>Household Income</u></b>				
Less than \$60,000	<b>35%</b>	36%	31%	33%
\$60,000 to \$89,999	<b>30%</b>	30%	33%	30%
\$90,000 to \$119,999	<b>17%</b>	16%	17%	20%
\$120,000 or More	<b>18%</b>	18%	19%	18%

Note: The percentages for each data set may not add to 100 percent where appropriate, due to rounding.

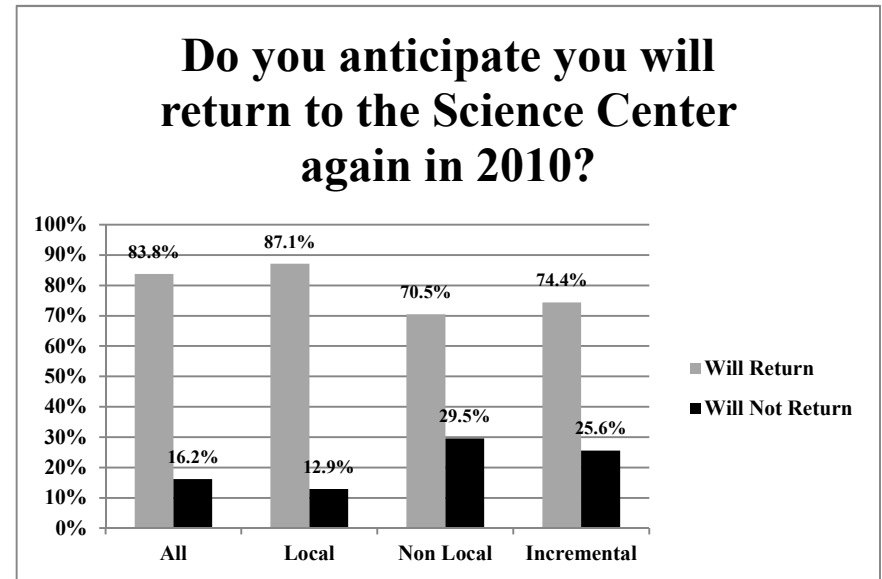
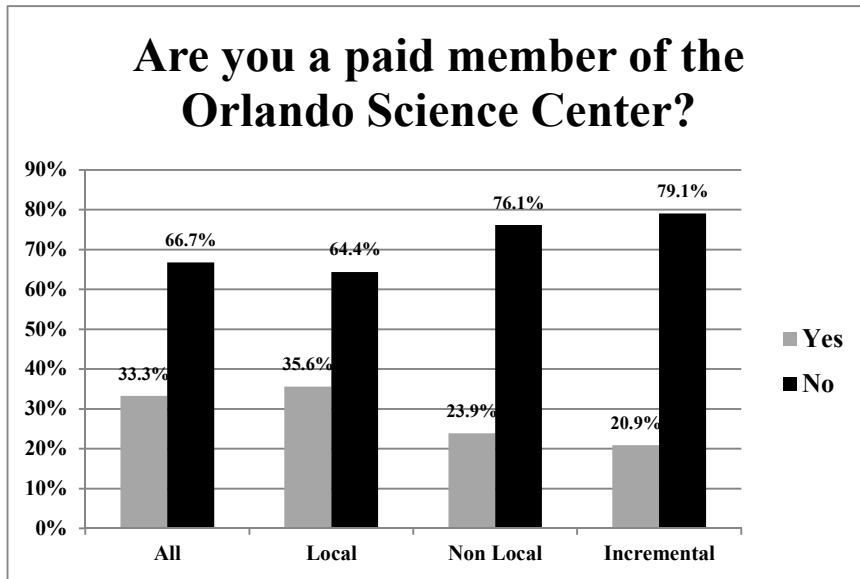
<b>AUDIENCE DEMOGRAPHICS</b> <i>(continued)</i>	<b>ALL ATTENDEES</b>	<b>Local Attendees</b>	<b>Out-of-Town Attendees</b>	<b>Incremental Attendees</b>
<b><u>Highest Level of Education Attained</u></b>				
High School or less	<b>18%</b>	19%	18%	21%
2-Year College Degree	<b>22%</b>	21%	25%	26%
4-Year College Degree	<b>40%</b>	39%	43%	47%
Master's or Doctoral Degree	<b>19%</b>	21%	13%	7%

<b>SOURCE OF INFORMATION ABOUT EVENT</b>	<b>ALL ATTENDEES</b>	<b>Local Attendees</b>	<b>Out-of-Town Attendees</b>	<b>Incremental Attendees</b>
RedChairProject.com	<b>0%</b>	1%	0%	0%
<i>Visit Orlando Arts</i> campaign	<b>2%</b>	2%	1%	0%
Attended in the past	<b>21%</b>	22%	19%	24%
E-mail from the event	<b>11%</b>	13%	4%	6%
Internet search/Web site	<b>16%</b>	13%	28%	26%
Social Networking (e.g., Facebook, Twitter)	<b>5%</b>	6%	2%	4%
From family and/or friends	<b>23%</b>	23%	21%	18%
Radio/Television	<b>12%</b>	12%	15%	16%
Newspaper/Magazine	<b>9%</b>	9%	10%	8%

Note: The percentages for each data set may not add to 100 percent where appropriate, due to rounding.

## CUSTOMIZED ANALYSIS

This section provides a basic analysis of the custom survey questions that were requested by the Orlando Science Center.



# Is there anything we should add or change to improve Otronicon next year?

## Perfectly satisfied

### NO SUGGESTIONS

The majority of respondents who answered this question did not find anything that should be added or changed to improve Otronicon next year.

### OTHER RESPONSES WORTH NOTING

- first time visitor-very cool!
- Just got here and love it! Tell people earlier, on heard on Fri morning Z-88.3 and Channel 2 news
- My goodness--more of everything! Loved it!
- my kids and husband are having a blast! Nothing changes
- Orange County and the City should probably fund the Science Center. We love it!
- This is a wonderful event that captivates all audiences

## About the Event Content

### GAMES

In regards to event content, most of the respondents suggested more games and activities overall.

#### SUGGESTED GAME GENRES:

- Classic & Arcade, Imports, New & Upcoming Releases, 3-D, PC multi-player, military simulators, Astronomy & Space, I-Phone Games, Robot Games

#### SUGGESTED GAME TITLES:

- Dragon's Lair, Pump it up Pro, In the Groove 2, Dance Dance Revolution, Halo, Guitar Hero, Wii, Modern Warfare 2, Rock Band, Galaga!, cod mw 2

### CONTENT FOR CHILDREN

Several respondents requested more games and activities targeted toward preschool and elementary school-aged children.

### OTHER MISCELLANEOUS SUGGESTIONS

- Add a Make Fair where people can feature electronics/gadgets they've made
- invite developers with new releases and product info
- Masquerade
- more animals
- more descriptive literature. More on how to animate
- More for girls
- Salary info on simulation jobs and # of openings

## **Event Logistics**

### **MANAGEMENT**

Most suggestions regarding event logistics were based on overall management of the event. Respondents suggested better volunteer and staff management, and shorter wait times for games. Several people suggested improving the quality and lowering the cost of food, and providing kid friendly meals. Several people also suggested the event last over a longer period of time.

### **LOCATION**

Several people suggested tips for improving logistics to the physical location: Different location-a place that is easier to find everything/more room for more exhibits

- we miss networked "battlefront" increased games "reachable" from wheelchair
- More "comfy" seating for older Adults-for kids to wander & experience the event

### **ADVERTISING**

Several survey respondents suggested more advertising and publicity for the event.

### **OTHER MISCELLANEOUS SUGGESTIONS**

Computer art that is printable for keeping

- contest prizes
- Continue Cinedome movies past 3pm. I arrived at 3:30 hoping to see a film while the children were elsewhere and am really upset that there was no movie. I do not like gaming and now am stuck for 3 hours with no escape. At least you have chess--great idea!!
- Costume contest should be improved better like more microphones and on a better day like Saturday
- haven't seen the exhibit yet
- jus bigger that is all
- Microphone for Guitar Hero
- more costume events-Star War Day/Gaming Day
- Outdoor events on 4th floor
- Rock Band location
- the Saturday night Adult Cocktails is a great idea. Very good. Kid careers great too!
- Try to integrate original exhibits as well
- better signage
- Organization. Labeling of vendors
- EA needs to be involved-duh
- more name brand sponsors
- Try involving some other local companies to increase turnout



## Which three activities did you enjoy the most during your visit?

	Average Ranking****	Sum of Rankings	Number of Times it was Ranked
Military Simulators	1.8	245	133
Rock Band Stage	1.8	174	97
Medical Simulators	2.1	179	84
Free Play (Video Games)	2.1	369	180
Game Design Workshops	2.1	83	40
Classic Arcade	2.2	248	113
Career Focus	2.4	39	16
Artronica (Art Gallery)	2.4	109	45

\*\*\*\* Participants were asked to rank the three activities that they enjoyed the most about Otronicon v.5 on a scale from 1 to 3 where “1” was most interesting and “3” was least interesting. The activities are ranked in descending order by their average ranking. Note also the right-hand column, which lists the number of times each individual activity was chosen at all (either “1”, “2”, or “3”).

## PROJECT OVERVIEW AND SURVEY METHODOLOGY

For the third consecutive year, United Arts of Central Florida contracted with Americans for the Arts to complete a program-wide study of projects supported in part by Orange County Arts & Cultural Affairs, through Tourist Development Tax (TDT) revenues. The 2009-10 Cultural Tourism Program includes 18 total events including festivals, exhibitions, and performances.

The main purpose of the research is to quantify the economic impact of arts and culture audiences relative to the Arts & Cultural Affairs Advisory Council's mission: "To elevate the status of Central Florida's arts and culture to that befitting a world-class community." Estimates are calculated of the total attendance and total spending by local, out-of-town, and incremental attendees, making it possible to determine the return-on-investment of the grant awards and economic impacts of the related audience spending.

**This particular report is based on the findings for Otronicon v.5, an event presented by the Orlando Science Center.**

The analysis presented in this report relies primarily on two sources of information:

1. First, the Orlando Science Center provided aggregate event attendance and project budget information about Otronicon v.5.
2. Second, Americans for the Arts designed a proprietary audience survey instrument. The questionnaire included a series of core, standardized questions that were included on the surveys for all 18 Cultural Tourism Program grantee events, as well as a few questions that were customized at the request of each event. The Orlando Science Center solicited completed audience-intercept surveys from randomly selected attendees to Otronicon v.5. The Orlando Science Center's customized sampling plan requested a minimum sample of 244 surveys for the analysis. The Orlando Science Center collected a total of 439 surveys. Because the minimum sample was achieved, project researchers were able to complete the project analyses.

It is important to note that all data have been analyzed separately for five distinct cohort groups:

1. All Attendees
2. Local Attendees (attendees who provided a primary ZIP Code that is located within the four-county Central Florida region—Lake, Orange, Osceola, and Seminole counties)
3. Out-of-Town Attendees
4. Incremental Attendees (a subset of the Out-of-Town Attendees, Incremental Attendees are out-of-towners who report that their primary reason for being in Central Florida that day was to attend Otronicon v.5 and also report that they would NOT have visited Central Florida that day if not for their plans to attend Otronicon v.5.
5. In some cases the data are analyzed based on unique attendees only. Because it is possible for a person to attend Otronicon v.5 multiple times, project researchers calculated the distinct number of individuals who visited at least once. For example, an individual who reported on their survey that they planned to attend Otronicon v.5 three separate times is only counted as one unique visitor.

Specifically, this document provides estimates of:

- The **total attendance** to Otronicon v.5 by both residents and non-residents of the Central Florida region.
- The **total dollars spent by these attendees** within the Central Florida region directly as a result of attending Otronicon v.5. It is important to note that all estimated audience spending figures calculated as a result of this research study are considered extremely conservative because they exclude the cost of admission to the event, if applicable. This is because the proprietary economic impact methodology utilized for this research study assumes that admissions costs are paid directly to the presenting arts organizations themselves. Therefore, the most accurate way to evaluate the impact of those dollars is to measure how the organizations spend those dollars back into the local economy. As such, the customized input/output modeling procedure employed does not include an “input” for the dollars that audiences spend on event admissions.
- The total (direct plus indirect) **economic impact** that this audience spending has on the Central Florida regional economy.

Finally, this research also captures a number of audience attributes including demographics, attendance patterns, and a basic analysis of the custom survey questions that were requested by the Orlando Science Center.

## ECONOMIC IMPACT METHODOLOGY

This report includes estimates of the total economic impact of the dollars spent by attendees to Otronicon v.5. To derive these estimates, economists customized an input/output model for the four-county Central Florida regional economy. Input/output modeling is a highly regarded method of economic analysis that has been the basis for two Nobel Prizes in economics. The models are systems of mathematical equations that combine statistical methods and economic theory in an area of study called econometrics. This form of economic analysis is well suited for this study because it can be customized specifically to the regional economy.

An input/output model was customized for the four-county Central Florida region (Lake, Orange, Osceola, and Seminole counties), based on the local dollar flow between 533 finely detailed industries within the region’s economy. This was accomplished using detailed data on employment, income, and government revenues provided by the U.S. Department of Commerce (e.g., County Business Patterns, Regional Economic Information System, Survey of State and Local Finance), local tax data (e.g., sales taxes, property taxes, and miscellaneous local option taxes), as well as the data from the 439 audience surveys that were collected from attendees to Otronicon v.5.

## **ACKNOWLEDGMENTS**

A research study of this scale requires the collaboration of multiple organizations and partners, including:

### **Americans for the Arts**

*Project management, questionnaire development, data entry, data analysis, and reporting*

Benjamin Davidson, Senior Director of Research Services

Meredith Sachs, Research Coordinator

Amanda Alef, Research Associate

Maureen Logan, Project Intern

### **United Arts of Central Florida**

*Project oversight and coordination*

Trudy Wild, Vice President of External Grants & Research

### **Orlando Science Center**

*Survey deployment and financial reporting*

In partnership with

### **Orange County Arts & Cultural Affairs**

Terry Olson, Director

**APPENDIX:**

**THE SURVEY INSTRUMENT FOR  
OTRONICON V.5**

# Central Florida Arts and Culture Audience Survey



- If you are younger than 18 years old, stop and return this survey.
- The information will be kept strictly confidential.
- Complete only one survey per immediate travel party.

1. Check the box below that includes the location of your primary residence. If you live in the Central Florida region for part of the year (e.g., if you are a student or if you own a second home here), tell us about the location of your local home.

If you answered A, B, C, or D, SKIP questions 2 through 3 and GO STRAIGHT TO QUESTION 4.	<input type="checkbox"/> A	Lake County, FL	<input type="checkbox"/> E	Elsewhere in Florida	If you answered E or F, CONTINUE WITH QUESTION 2.
	<input type="checkbox"/> B	Orange County, FL	<input type="checkbox"/> F	I do <u>not</u> live in Florida	
	<input type="checkbox"/> C	Osceola County, FL			
	<input type="checkbox"/> D	Seminole County, FL			

2. What is the ZIP Code, Postal Code, or country of your primary residence? \_\_\_\_\_

3. Would you be in the Orlando area right now if this cultural event were not taking place?  A Yes  B No

4. Tell us about yourself and the people who are visiting Otronicon with you today. Including you, how many people in your travel party belong in each of the following categories? Include only the people in your immediate travel party (e.g., not entire tour groups).

<b>4a. Gender:</b> # _____ Male + # _____ Female = # _____ Total in Immediate Travel Party	←◆WRITE THE NUMBER OF PEOPLE Not checkmarks or "X"
<b>4b. Age:</b> # _____ Younger than 18    # _____ 18 to 34    # _____ 35 to 44    # _____ 45 to 54    # _____ 55 to 64    # _____ 65 or Older	
<b>4c. Ethnicity and/or Race:</b> # _____ Caucasian/White    # _____ African American/Black    # _____ Hispanic/Latino/Spanish    # _____ Other	

5. List the estimated total dollar amounts that you and the members of your immediate travel party have spent or plan to spend in the Orlando area specifically as a result of TODAY'S VISIT TO OTRONICON. Remember to include money spent before, during, and after the event. If exact figures are not available, use your best estimates.

A. Admission fees/tickets to *this* event \$ \_\_\_\_\_

B. All other purchases (i.e., meals & refreshments, overnight lodging, entertainment, local transportation, gifts & souvenirs, clothing, child-care, books, recording, art, etc.) \$ \_\_\_\_\_

6. How did you hear about Otronicon? (Check all that apply)

<input type="checkbox"/> A RedChairProject.com	<input type="checkbox"/> D E-mail from the event	<input type="checkbox"/> G From family and/or friends
<input type="checkbox"/> B Visit Orlando Arts campaign	<input type="checkbox"/> E Internet Search/Web Site	<input type="checkbox"/> H Radio/Television
<input type="checkbox"/> C Attended in the past	<input type="checkbox"/> F Social Networking (e.g., Facebook, Twitter)	<input type="checkbox"/> I Newspaper/magazine

7. Otronicon is a four-day event that began on January 15, 2010 and will end on January 18, 2010. How many days, in total, will you visit Otronicon to see the exhibition during that time span? One? Two? Three? Or four? Include previous visits, today's visit, and anticipated future visits. Use your best estimate. # \_\_\_\_\_

8. Which of the following ranges includes your annual household income? (Check only one)

A Less than \$60,000     B \$60,000 - \$89,999     C \$90,000 - \$119,999     D \$120,000 or More

9. What is the highest level of education that you have completed? (Check only one)

A High school or less     B 2-year college degree     C 4-year college degree     D Master's or doctoral degree

10. Are you a paid member of the Orlando Science Center?

A Yes     B No

11. Do you anticipate that you will return to the Orlando Science Center again in 2010 (after Otronicon ends)?

A Yes     B No

12. Is there anything we should add or change to improve Otronicon next year? \_\_\_\_\_

13. Of the following types of activities, RANK the three that you enjoyed most about your visit Otronicon. Choose only the three you enjoyed most, and rank from "1" to "3" (where "1" is most interesting and "3" is least interesting).

_____ Military Simulators	_____ Rock Band Stage	_____ Free Play (Video Games)	_____ Game Design Workshops
_____ Medical Simulators	_____ Classic Arcade	_____ Career Focus	_____ Artronica (Art Gallery)

THANK YOU VERY MUCH!!!!!!