

January 2018

Waterfront Development Corporation: Visitor Profile & Economic Impact Study

Final Report

This research tells a data-derived story about Louisville's Waterfront Park and the role that it plays in its community. It describes the diversity of visitors to the park; the economic impact of these visitors; and the levels of satisfaction felt by those who visit the Park. This information can be used to inform the Park's future strategy, trajectory, and financing.

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About IQS Research

Founded in 1999, IQS Research is a custom market research and data analytics firm. We provide precise and actionable insights about your employees, communities, customers and markets. We are the trusted partner that decision-makers rely on, not just to answer questions, but to enable meaningful change.

For more information, please visit www.iqsresearch.com.

Material Accuracy

The intent of the Waterfront Development Corporation: Visitor Profile Study and this subsequent report is to provide accurate and authoritative information about the profile of those who visit Waterfront Park. IQS Research makes reasonable effort to ensure that all data are collected, analyzed, and portrayed in an accurate and factual manner. However, there is no guarantee that these data are without flaws or that the use of these data will prevent differences of opinion or disputes, and IQS Research bears no responsibility for their use or consequences.

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Methodology

Beginning on May 18, 2017 and ending on November 6, 2017, IQS Research dispatched a team of trained data collectors to conduct in-person interviews with park visitors at Louisville's Waterfront Park.

To ensure that responses were collected from a representative sample of park visitors over the course of the late spring, summer, and fall, team members solicited interviews via iPads and paper surveys during four-hour shifts at a variety of park locations, times of day, weekdays/weekends, and event-centered and non-event centered outings.

Waterfront Park was divided into four zones (please see Figure 1A on the following page). Data collection team members were assigned to conduct interviews within specific zones during their shifts at the park. Additionally, data collectors solicited interviews at a variety of times including morning, mid-day, and evening shifts. These shifts were balanced between week-day and weekend outings on both event-centered days and non-event-centered days at the park.

To achieve representativeness not only in accordance with the times that people visit the park but also in terms of the types of individuals who visit the park, data collection team members were trained to abide by a "line of sight" rule. According to this rule, data collection team members approached and subsequently asked park visitors to complete the survey in the order that the visitors appeared in the data collector's line of sight.

The survey instrument fielded consisted of 31 questions in total and included both closed and open-ended questions about the visitor's experience at the park. After a series of demographic questions about the respondent's background, respondents were invited to participate in an optional online follow-up survey.

Those who agreed received a personalized email invitation to complete the survey one day after their trip to the park. Personalized reminders were also provided to further encourage participation. The follow-up survey consisted of 22 questions, both closed- and open-ended, covering additional topics including the user experience visiting the park and financial elements. Individuals who completed this survey were entered into a drawing for a \$250 gift card – a "thank you" incentive that was advertised to individuals when they are asked if they would like to participate in the follow-up process.

This data set includes a total of 1,533 of in-person responses. For the purposes of calculating a margin of error, we used an estimated annual park attendance of 1.6 million individuals which yields a margin of error of $\pm 2.5\%$ at the 95% confidence level. When the total persons accompanying all survey respondents are tabulated, 5,469 visitors are accounted for in this data collection process.

Of the 1,533 visitors interviewed in person, 340 individuals, or 22%, went on to complete a follow-up survey. Relative to overall estimated park attendance, this delivers a sampling error for the overall population of $\pm 5.3\%$ at the 95% confidence level.

Figure 1A:



Figure 1A: Map of Waterfront Park divided into zones used by IQS' Data Collection Team

The economic impact modeling included in this report was produced by Barry Kornstein. Barry is an Economic Development Data Research Consultant with degrees in Applied Mathematics, Literature, Political Science, and International Studies from the Massachusetts Institute of Technology, University of Minnesota- Twin Cities, and Claremont Graduate University. He spent 23 years at the University of Louisville, working hand-in-hand with economics professor Dr. Paul Coomes from 1993-2012 before going on to serve as the lead Economics researcher for the Urban Studies Institute in 2012. He has produced economic and fiscal impact studies for state and local government agencies, industry trade groups, and nonprofit organizations, such as the Kentucky Fair Board, Kentucky Center for the Arts, Kentucky Commission on Military Affairs, Louisville Convention and Visitors Bureau, Louisville Water Company, LG&E, Kentucky Distillers Association, Kentucky Automotive Industry Association, and the Speed Art Museum.

Who visits Waterfront Park?

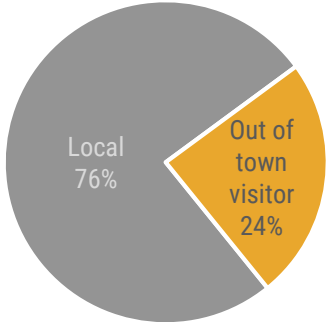
Visitor Profile

Demographics

Residency: When referring to the residency of Waterfront Park visitors, there are two groups. The first group can be identified as “locals” and refers to park visitors who live in the immediate metro area. The immediate metro area encompasses seven Kentucky and Indiana counties (Jefferson, Bullitt, Oldham, Shelby, Clark, Floyd and Harrison county). The majority of Waterfront Park visitors reside in Kentucky and more specifically in Jefferson County.

Three out of four Waterfront Park visitors reside in the immediate metro area.

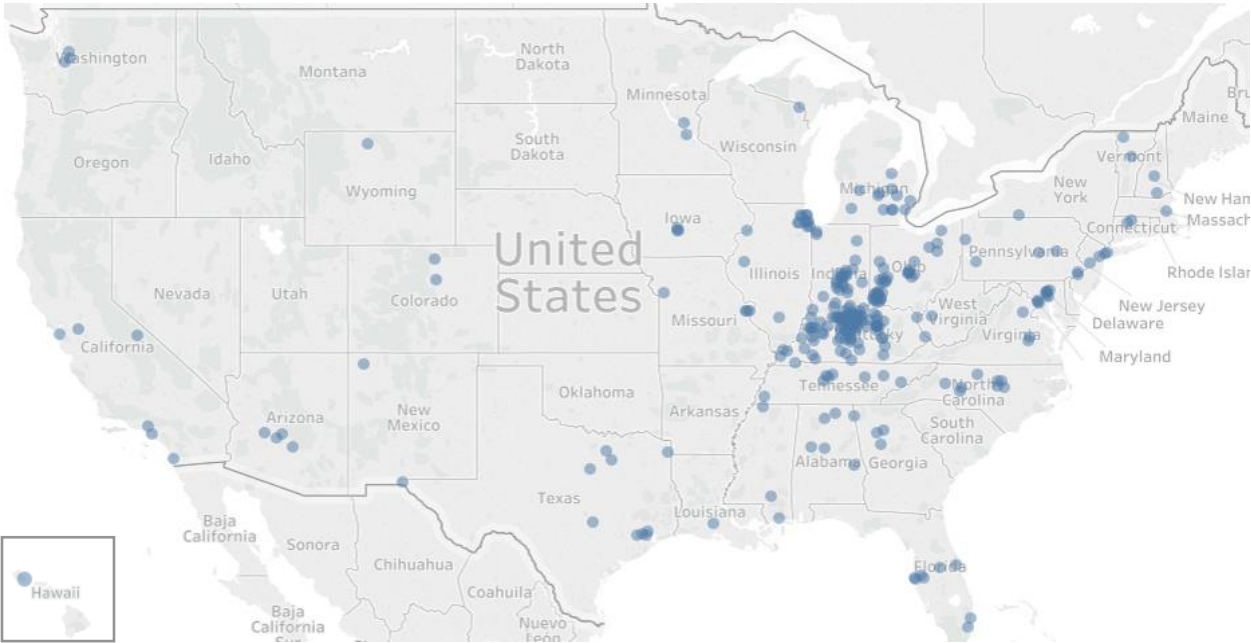
Residency of Waterfront Park visitors



■ Local ■ Out of town visitor

The second group is identified as “out of town visitors”; this refers to park visitors who do not reside in the immediate metro area. This group represents 35 US states and three other countries (Australia, Germany and Brazil).

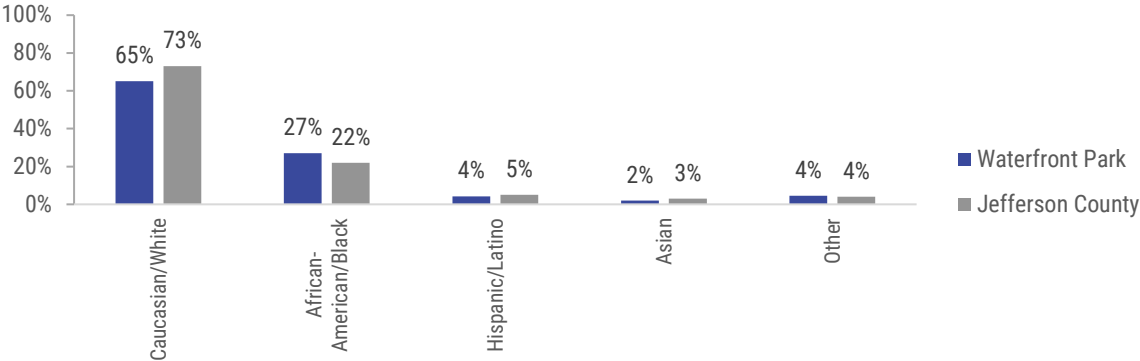
Below is a map that illustrates all unique zip codes provided by respondents within the United States.



Ethnicity and language: Waterfront Park is more diverse than Jefferson County. Illustrative of this are the 65% and 27% of park visitors who identify as Caucasian/White and African-American/Black respectively. In comparison, 73% of those who live in Jefferson County identify as Caucasian/White and 22% who identify as African-American/Black.¹

Waterfront Park is more diverse than Jefferson County.

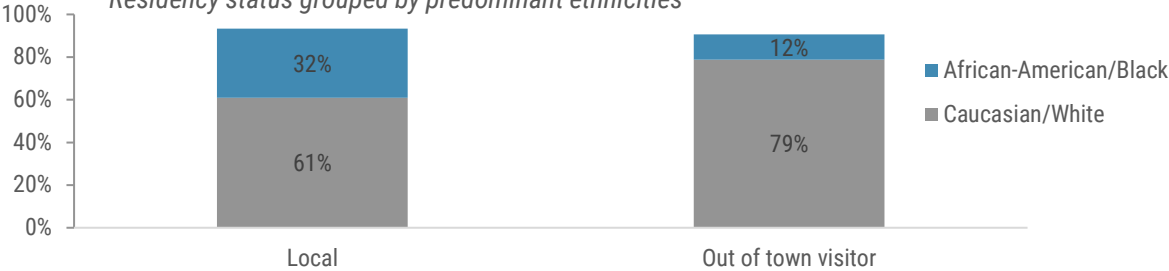
Jefferson County and Waterfront Park racial diversity



Out of town visitors are significantly more likely to be Caucasian/White than those who are local to the immediate metro area.

Out of town visitors are significantly more likely to be Caucasian/White than locals.

Residency status grouped by predominant ethnicities



In addition, we find that 75% of event-driven visitors identify as Caucasian/White while 18% identify as African-American/Black.

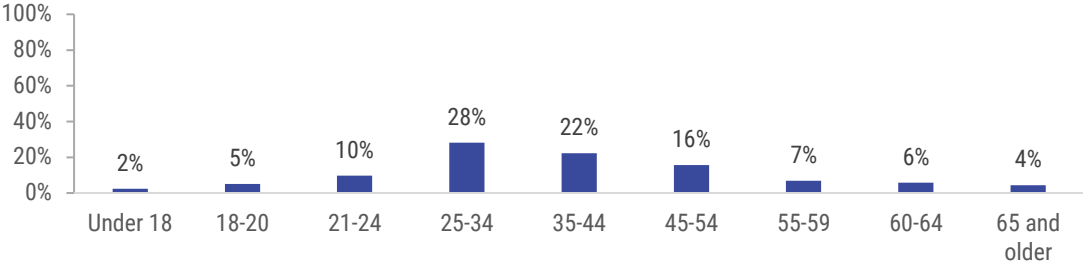
Park visitors speak 30 different languages, inclusive of languages such as Spanish, Arabic, Chinese, French, Bengali, Bosnian, Tagalog and Thai. The predominant language spoken is English (93%) with the next most commonly spoken language being Spanish (3%). A list of all languages and the respective amount of Waterfront Park visitors who speak those languages can be found in the appendix.

¹<https://www.census.gov/quickfacts/fact/table/jeffersoncountykentucky/PST04521>

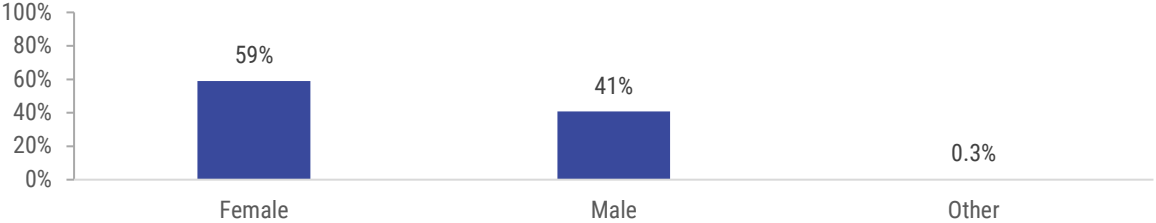


Age and gender: Waterfront Park attracts visitors of all ages. There is a heavy concentration of Waterfront Park visitors who fall within the 25 to 44-year-old age range (50%).

Waterfront Park attracts visitors of all ages.
Age of Waterfront Park visitors

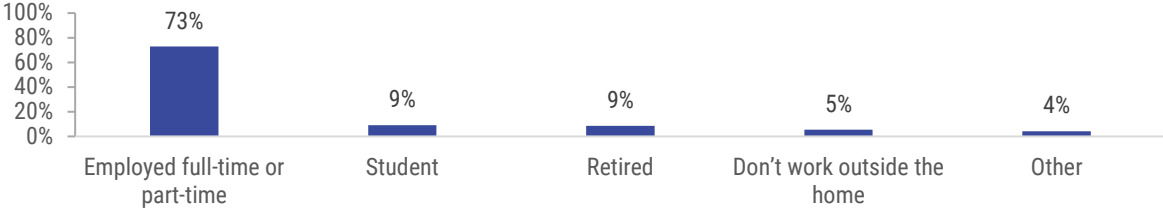


Gender of Waterfront Park visitors

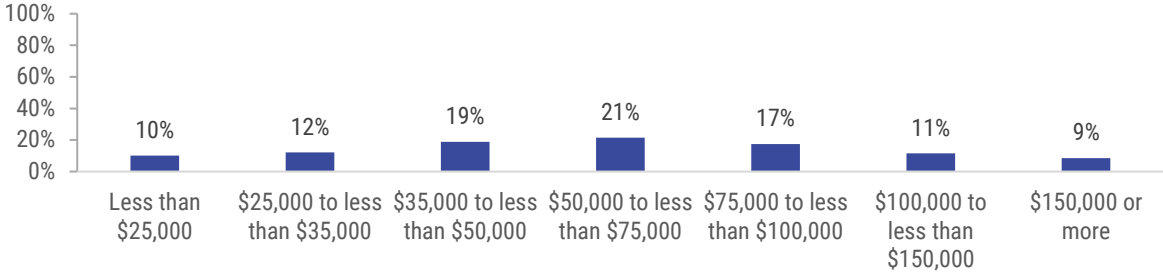


Income and employment status: In large, respondents are employed full or part-time. In comparison, the income distribution of Waterfront Park visitors is much less distinct; we see that people of various income levels visit Waterfront Park.

Waterfront Park visitors are of various income levels and are predominantly employed.
Employment status of Waterfront Park visitors



"What is the combined annual income of everyone in your home?"

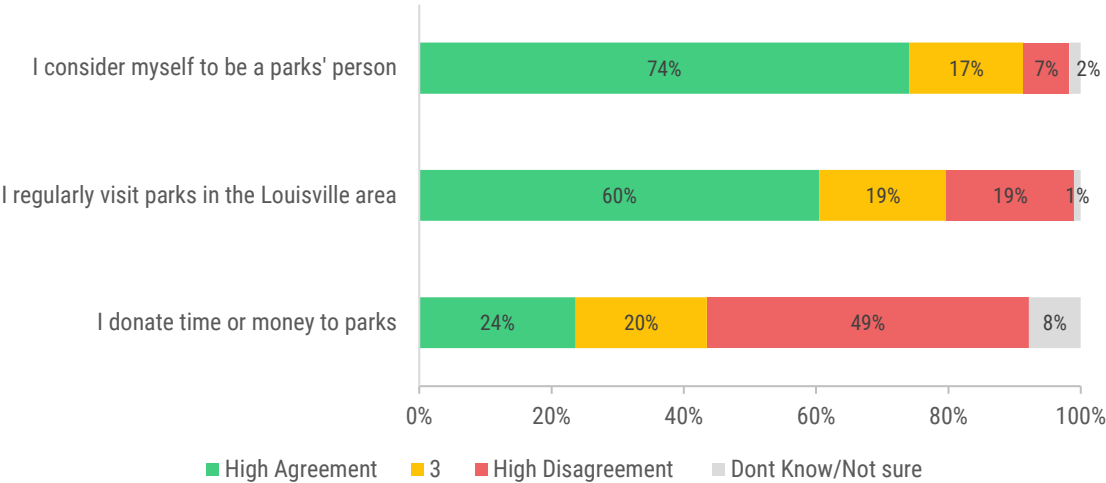


Out of town visitors reported having a larger combined annual income than locals. Locals are twice as likely to be part of the lower half of the income distribution than out of town visitors. Nearly half of locals (48%) have a combined annual household income of less than \$50,000, in comparison to the quarter out of town visitors (24%).

Commitment with parks

Shifting to park visitors' level of commitment with parks, we observe that three out of four online survey respondents consider themselves to be a "parks' person" and slightly fewer regularly visit parks in the Louisville area (60%). Despite park visitors' interest and regular interaction with parks, only 24% donate time or money to parks.

The majority of Waterfront Park visitors consider themselves to be a "parks' person" and regularly visit parks in the Louisville area, but relatively fewer donate time or money to parks.



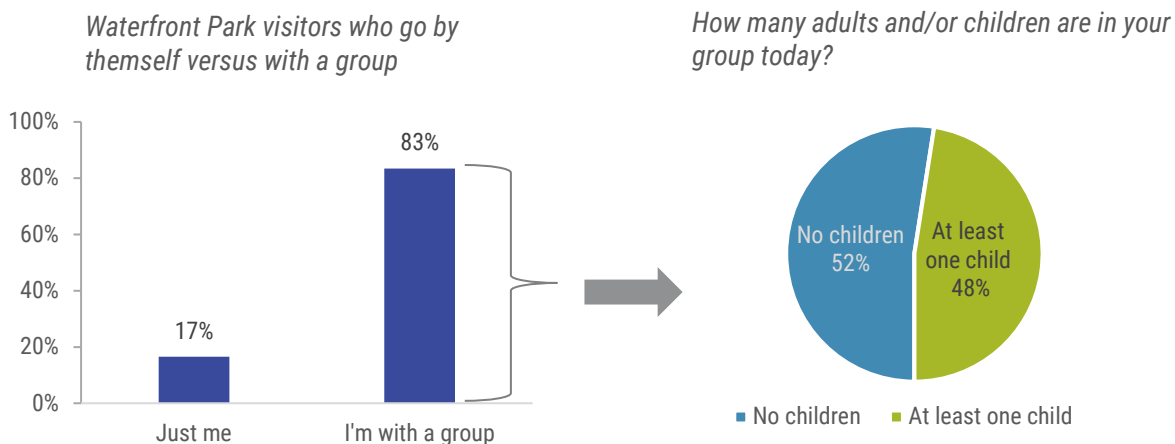
Trip Characteristics

Group Profile

Group composition

Now that we have examined who visits Waterfront Park, we will explore what their trip to Waterfront looks like. Generally speaking, park visitors visit Waterfront Park with a group (83%) as opposed to visiting the park alone. The majority of park visitors who go with a group are nearly as equally likely to bring children to the park as they are to go with other adults.

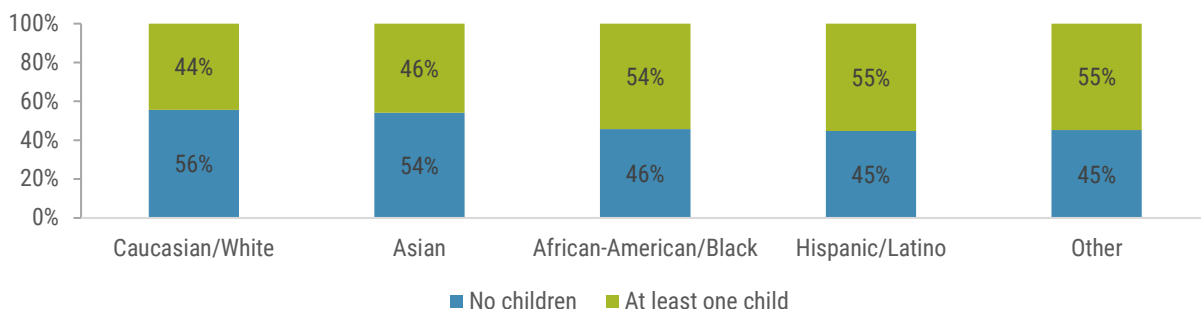
Park visitors are almost equally likely to bring children as they are to visit exclusively with other adults.



The likelihood of park visitors bringing children to the park varies across race and ethnicity. Caucasian and Asian park visitors are the least likely to bring children with them to Waterfront Park while African-Americans, Hispanics and those who responded with 'Other' are more likely to bring children to Waterfront Park.

Caucasian park visitors are less likely to bring children with them to Waterfront Park than those who identified as African-American.

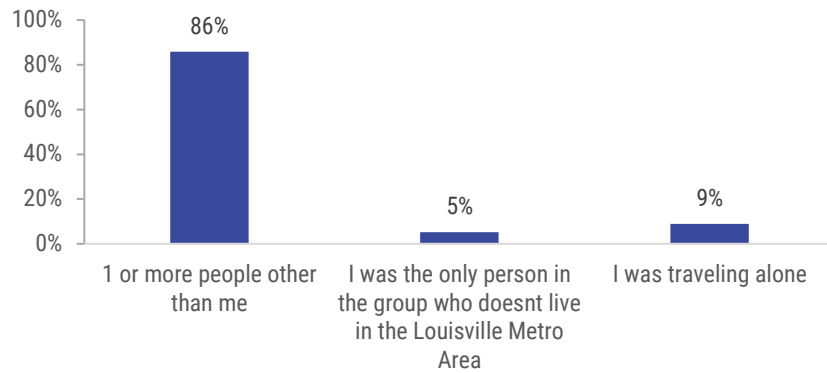
Waterfront Park visitor group composition stratified by race/ethnicity



Focusing on the group composition of out of town visitors, online survey participants indicated they predominantly travel with others who also live outside the immediate metro area. These 86% of individuals are most likely to come with one other person, though as many as 31 traveling companions was reported.

Out of town visitors predominantly travel with other out of town visitors when visiting the metro area.

"How many people in your party also live outside of the Louisville Metro area?"

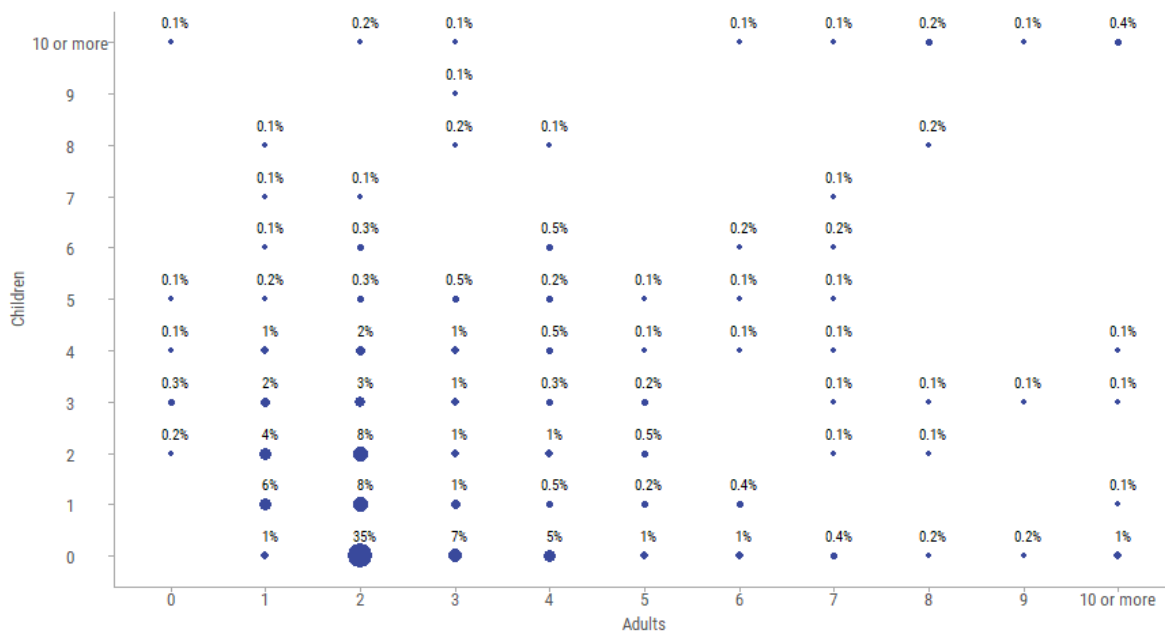


Diving deeper into the group structure of

Waterfront Park groups, when we look at each individual combination, specifying beyond if visitors brought children or not a few observations can be made. The first being, the single most common group structure is two adults and zero children. Another observation that can be made is with regard to drawing in large groups, 22% of the groups that visit Waterfront Park are composed of five or more people. Illustrative of these observations is the chart below that depicts the size and combination of groups that visit Waterfront Park.

The single most common group combination of Waterfront Park visitors is two adults and zero children.

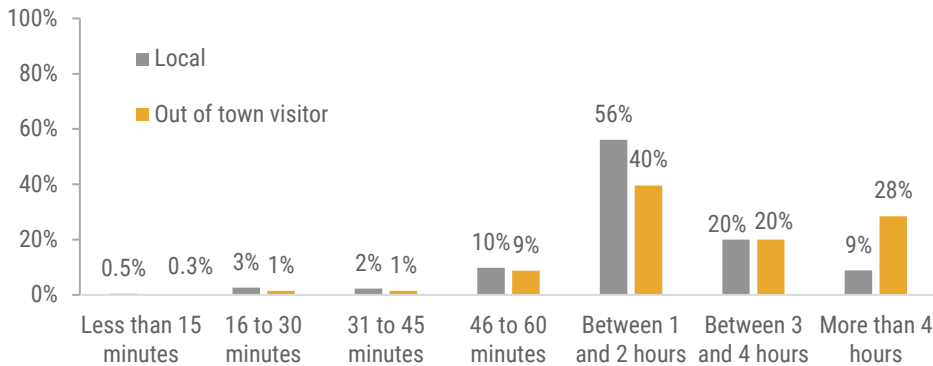
Group composition of Waterfront Park visitors



Frequency & Length: Overall, a park visitor will typically spend between one to two hours at Waterfront Park. When stratifying by residency, we notice out of town visitors are three times more likely to spend more than four hours at the park than locals are.

Park visitors typically spend between one to two hours at Waterfront Park.

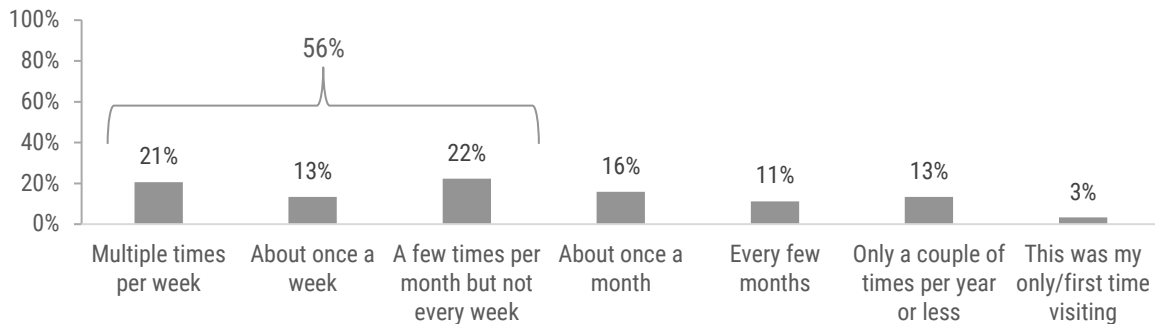
"About how long will you visit the park today?"



Examining the frequency at which people visit Waterfront Park, we observe locals visit often. In fact, more than half of the locals visit Waterfront Park at least a few times a month (56%). When considering out of town visitors, nearly one out of four out of town visitors indicated that they visit Waterfront Park multiple times on a single trip.

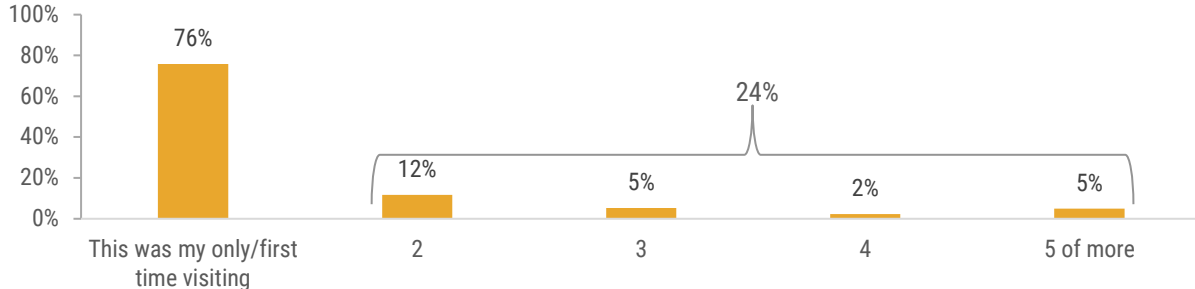
Over half of the park visitors who reside in the Louisville Metro Area visit Waterfront Park more than once a month.

Frequency at which locals visit Waterfront Park



Nearly one fourth of out of town visitors indicated they visited Waterfront Park multiple times during their trip.

Number of times out of town visitors indicated they had visited Waterfront Park



Motivation to visit Waterfront Park: With regard to park visitors' motivation to visit Waterfront Park, we find that visitors are attracted to the park for various reasons. The table below illustrates the various reasons park visitors go to Waterfront Park, listing the reasons in order of most frequently cited to least commonly cited.

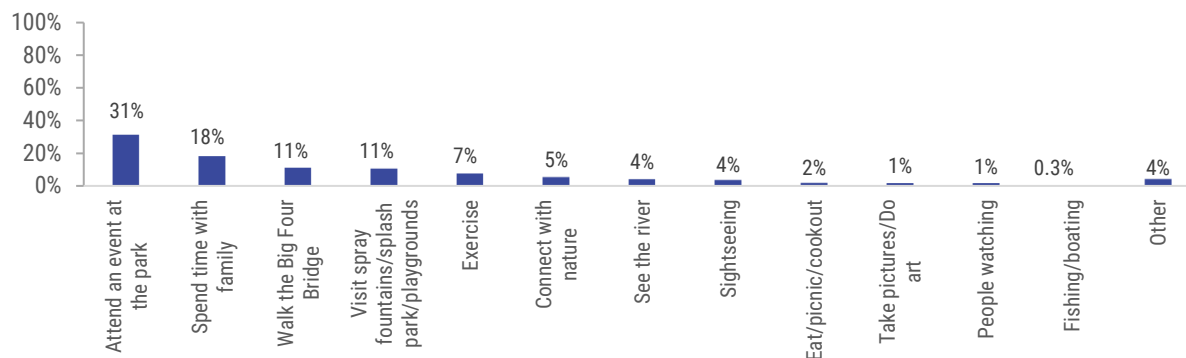
"What are the reasons for your visit to the park today?"

See the river	45%	Connect with nature	33%
Spend time with family	45%	Take pictures/Do art	30%
Walk the Big Four Bridge	38%	Visit spray fountains/splash park/playgrounds	29%
People watching	37%	Eat/picnic/cookout	19%
Exercise	36%	See specific attraction in the park (e.g. Lincoln Memorial)	14%
Attend an event at the park (concert, festival, fundraiser)	36%	Fishing/boating	1%
Sightseeing	34%	Other (Please specify)	5%

When identifying their main reason for visiting Waterfront Park, park visitors provided more distinct responses. One third of the park visitors visit Waterfront Park for the primary purpose of attending an event.

Attending an event is the main reason one third of people visit Waterfront Park.

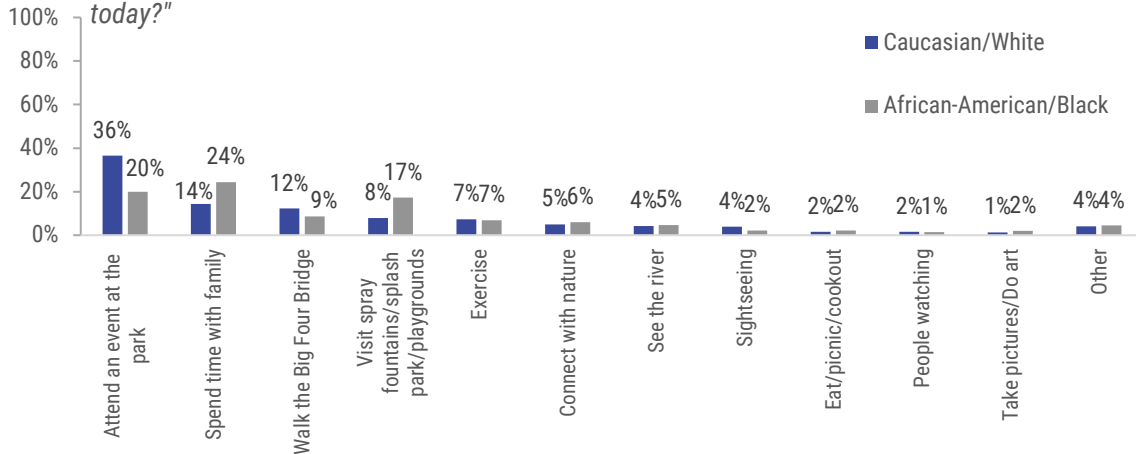
"From the answers you just gave, what is the main reason for your visit to the park today?"



The main reason to visit Waterfront Park varies across race/ethnicity; African-American park visitors provided more child-oriented reasons such as to 'spend time with family', or to 'visit spray fountains/splash park/playgrounds'. In contrast, Caucasian/White park visitors are significantly more likely to visit Waterfront Park to attend an event.

African-American park visitors are more likely to visit the park for child-oriented reasons while Caucasian park visitors most commonly visit to attend an event.

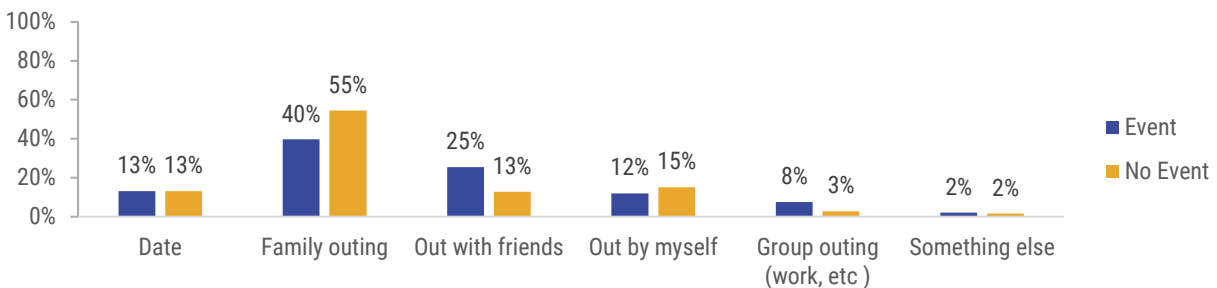
"From the answers you just gave, what is the main reason for your visit to the park today?"



We also observe a difference in motivation between event-driven visitors and non-event-driven visitors (event-driven visitors are defined to be those who were surveyed during an event). Park visitors are significantly more likely to be out with friends when attending an event, and considerably less likely to be out with their family.

Overall people describe their visit as a family outing, but significantly less so when at an event.

"How would you describe today's trip? Would you call this a...?"

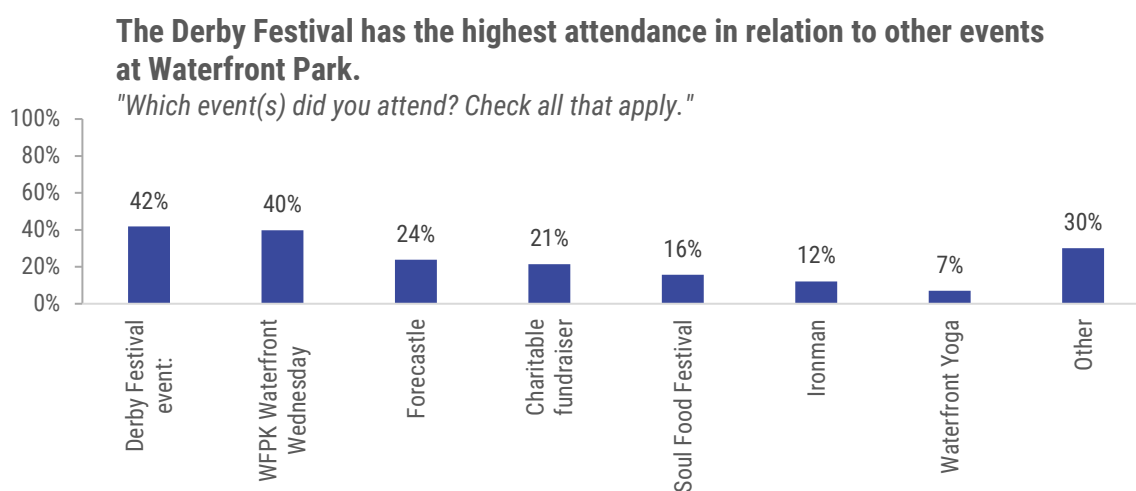


Park Usage

Events

A large majority of park visitors have attended an event hosted by Waterfront Park; representative of this is the 75% of online survey respondents who said “yes” when asked, “Hosting an event is a significant component of Waterfront Park's mission to the community. Have you attended an event at Waterfront Park?”

The most popular events are the Derby Festival event (42%) and Waterfront Wednesdays (40%). Forecastle (24%) and Charitable fundraisers (21%) are also popular choices. Frequent mentions in the “Other” option included the Mighty Kindness event and Hike, Bike and Paddle.



Park visitors think Waterfront Park should bring in a variety of additional events. Below is a table illustrating the events, in which online respondents expressed interest.

“What type of additional events, if any, do you think Waterfront Park should bring in? (Please check all that apply).”

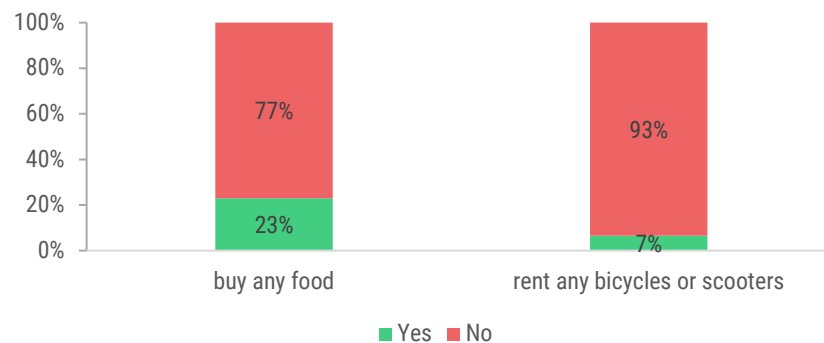
Free concerts open to the community	66%	Fundraising events (cancer walks, etc.)	34%
Farmer’s Market	54%	Paid concerts	31%
Holiday activities	53%	Dog activities	30%
Water activities (boat races, paddling)	44%	Political events	13%
Ice Skating Rink	38%	Other	6%
Workout classes	33%	-	-

Vendors

Online survey respondents indicated occasional interaction with vendors at Waterfront Park. Representative of this are the 23% of park visitors who buy food and the 7% of park visitors who rent a bicycle or scooter (7%) while at Waterfront Park.

Park visitors typically do not buy food nor rent bicycles or scooters while at Waterfront Park.

"During your most recent trip to Waterfront Park, did you...?"



Park visitors are not short of recommendations when it comes to additional food and rental options they would like to see. Food trucks, local food and healthy food options are popular recommendations for additional food options. The most popular recommendations for rentals include water activities such as boat rentals, kayaks and paddle boats. A full list of suggestions for both categories is included as Appendix B – Recommendations.

What is the impact of Waterfront Park, both in terms of the local and state economy?

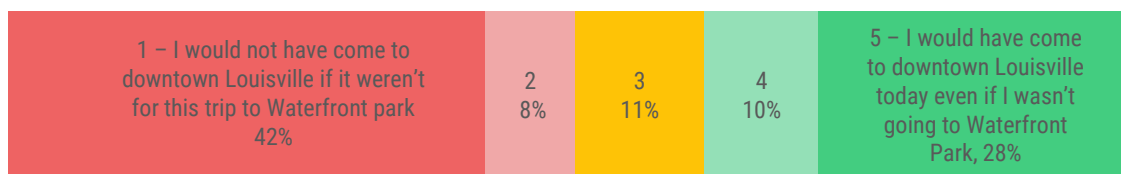
Impact on Downtown Louisville

If Waterfront Park did not exist...

In assessing the impact Waterfront Park has on downtown Louisville, we will start by examining the likelihood of park visitors going to the downtown area if Waterfront Park were not part of their trip. Half of the park visitors indicated they would not go downtown were it not for Waterfront Park (score of 1 or 2) while 38% indicated they would go downtown regardless (score of 4 or 5). Below is a chart illustrating how respondents answered this question on a scale from one to five, one being they would not have made the trip downtown and five being they would have made the trip downtown.

One out of two visitors specified they would not have come to downtown Louisville were it not for Waterfront Park.

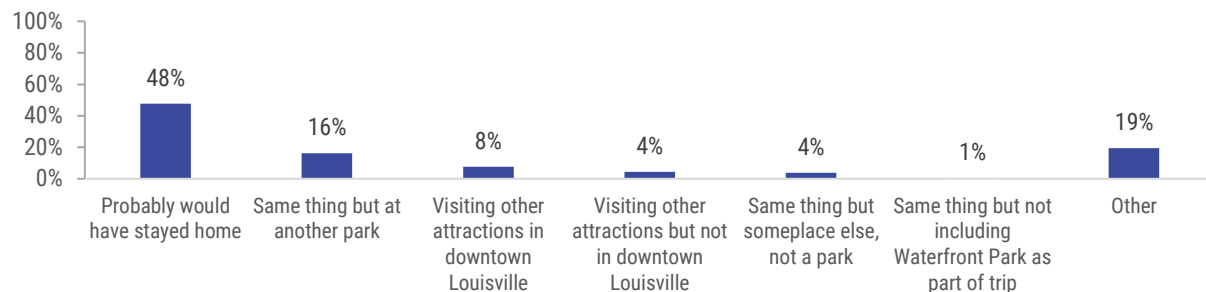
"If you were not at Waterfront Park, how likely is it that you would have come to downtown Louisville today?"



Coinciding with the previous statement, 48% of park visitors indicated they would stay home if they had not come to Waterfront Park.

Nearly half of park visitors specified they would have stayed home if they did not come to Waterfront Park.

"If you weren't at Waterfront Park today, what else do you think you would be doing?"



When assessing the other activities park visitors interact with while downtown, 54% of respondents specified that visiting Waterfront Park was the only activity in their trip to downtown. Of the respondents who specified plans apart from Waterfront Park, the most common activity is eating at a downtown restaurant (21%).

“What else are you going to be doing while you are in downtown today? Please only consider places that are in Downtown Louisville (check all that apply).”

Only visiting the park as part of this trip	54%
Eating at a downtown restaurant	21%
Visiting the park but then leaving downtown to do other things	16%
Visiting one of the museums (Louisville Slugger, Muhammed Ali, Frasier, Louisville Science, etc.)	3%
I work in the area	3%
Visiting 4th Street Live	3%
Visiting one of the downtown shops	2%
Slugger Field – Bats Baseball	1%
Visiting another downtown business that is not a restaurant or shopping	1%
Visiting the Belle of Louisville	1%
Slugger Field – Soccer	0.4%
Attending an event at YUM! Center	0.1%
Other	8%

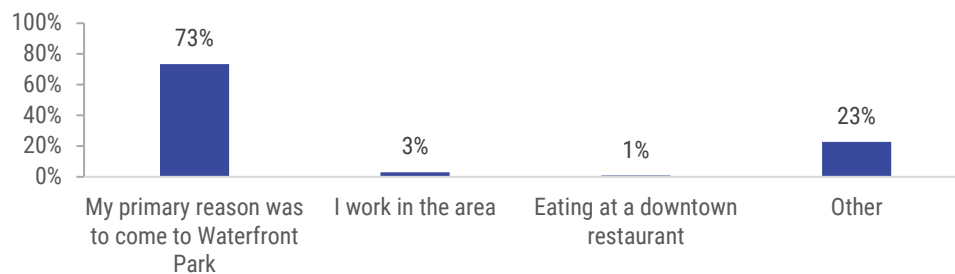
Spending profiles

Locals

Motivation: Shifting attention to the economic impact locals have on downtown Louisville, we will first examine the main intent locals have when visiting the area. Nearly three quarters of the locals identified Waterfront Park as their primary reason for visiting downtown.

Three in four locals identified Waterfront Park as their primary reason for visiting downtown Louisville.

"What is the main reason you are visiting downtown Louisville today?"

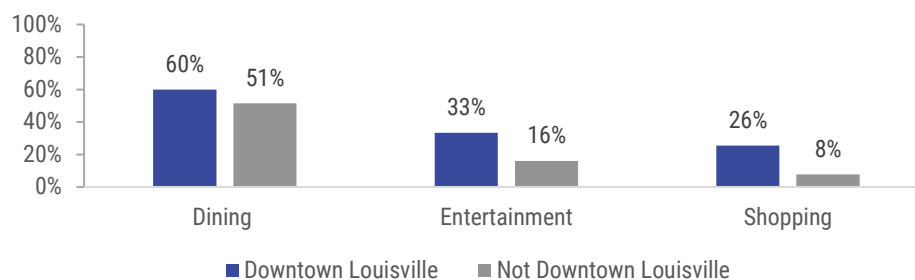


Spending profile: Online survey respondents were asked to itemize the spending of their most recent trip to the downtown area that included Waterfront Park, by first specifying if the money was spent in Downtown Louisville or not. Respondents then identified the amount of money spent in the three categories (dining, entertainment and shopping).

We found that local park visitors most commonly spend money while downtown than when in other parts of the metro area, regardless of spending category.

Locals more frequently spend money while downtown than when in other parts of the metro area.

Locals who spent money stratified by category



Exclusively focusing on the locals who spent money, we find on average they spend about the same amount of money on dining and entertainment irrespective of being downtown. In comparison, when analyzing the shopping category, the average amount spent while downtown is \$22 more than the average spent before or after they go downtown.

“Thinking about the money that you spent during your most recent trip that included Waterfront Park, about how much did you spend on the following items?”

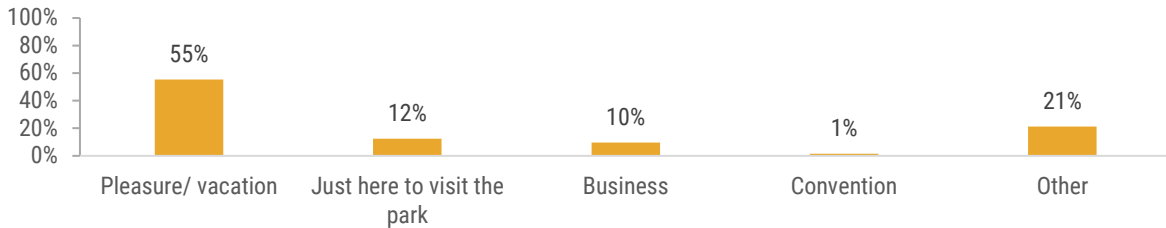
	Downtown Louisville		Not Downtown Louisville	
	Range	Average	Range	Average
Dining	\$2-\$200	\$36	\$6-\$150	\$36
Entertainment	\$5-\$300	\$59	\$5-\$180	\$55
Shopping	\$1-\$500	\$85	\$10-\$500	\$63

Out of town visitors

Motivation and length of trip: Out of town visitors most frequently visit the Louisville and Southern Indiana area with the purpose of pleasure or vacation; over half of park visitors describe their trip as such. In comparison, about one in ten out of town visitors specified that they were in the area just to visit the park.

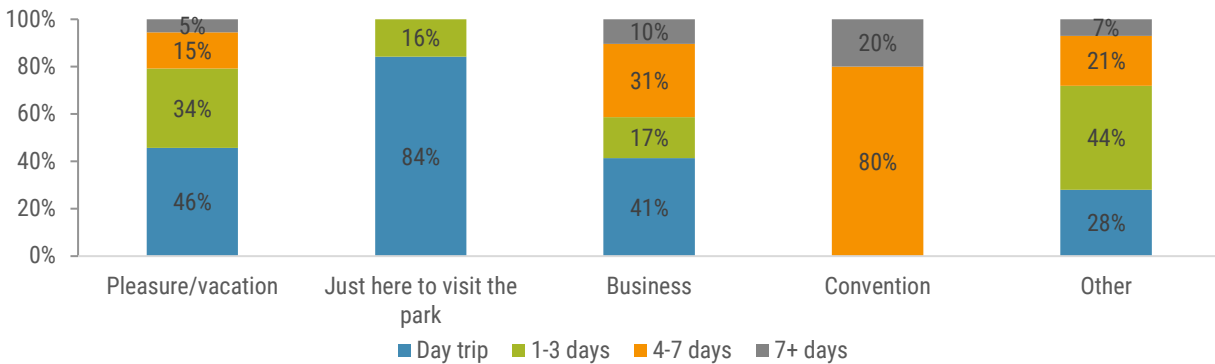
Out of town visitors most frequently visit the Louisville Metro Area for pleasure or vacation.

"What is the main reason for your visit to this area?"



Out of town visitors in the area for a convention typically stay the longest.

Out of town visitors trip length stratified by reason for visiting the area



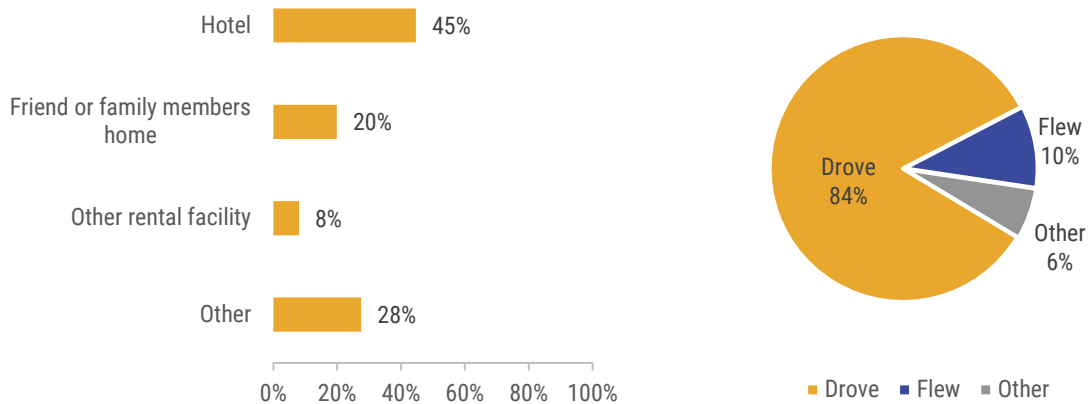
Stratifying the length park visitors stay by purpose, we observe that out of town visitors visiting for conventions stay the longest, typically staying for four to seven days. In comparison, park visitors who make the trip with the main intent of visiting the park stay the shortest length of time, most commonly staying just for the day.

Transportation and lodging: With regard to lodging, out of town visitors are most likely to stay at a hotel (45%). The most common answer among the 'other' lodging category of those who were staying longer than a day is camping and the most common method of transportation for out of town visitors is driving (84%). This should not be surprising as 93% of the respondents live in Kentucky or a bordering state of Kentucky.

For their trip to the Louisville Metro area, out of town visitors typically stay at a hotel and drive.

"While you are visiting, are you staying in a...?"

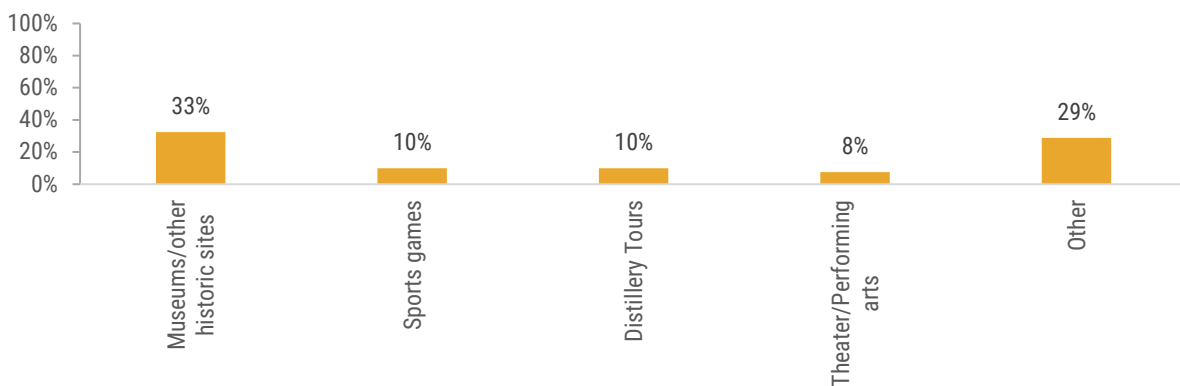
"For your most recent trip to the Louisville area, what form of transportation did you use to get to the area?"



Activities: Out of town visitors who responded to the online survey were asked what type of activities and places they engaged with while in the Louisville Metro area. The most popular choice is museums and other historic sites (33%) while sports games, distillery tours and theater received comparably similar scores (8%-10%).

The most popular activity among out of town park visitors is museums and historic sites.

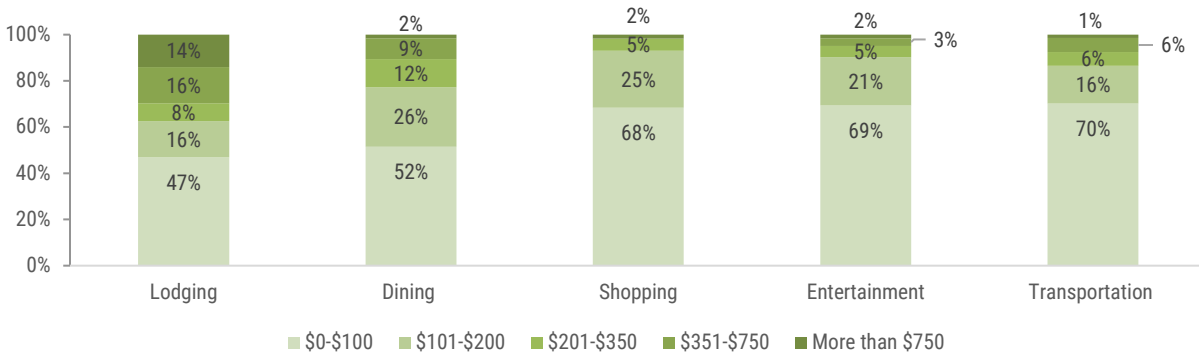
"While you were in Louisville, what other activities or attractions did you visit? (Please check all that apply)."



Spending profile: Focusing on the spending profile of out of town visitors, we see they typically spend the most on lodging and the least amount of money on transportation.

Out of town visitors typically spend the most on lodging and the least amount of money on transportation.

Out of town visitor spending profile



The following section is the in-depth economic impact assessment produced by Barry Kornstein. This economic impact assessment includes a thorough analysis of the impact that Waterfront Park has on the economic health of downtown Louisville and Jefferson County.

Assessed Economic Impact

The term “economic impact” is reserved for export industries that bring in new money to a regional economy, such as most manufacturing plants (because they sell their goods nationally or internationally). Most retail and service industries merely absorb local dollars that would have been spent regionally if not at a particular merchant in question, although there are exceptions such as the IKEA phenomenon, where a store is a destination for people living well beyond the immediate region, or an architectural or business consulting firm with clients nationwide. In fact, many businesses provide a mix of export and local supply. So, it is not unusual for an economic impact study to seek to tease out the export aspect of an activity from its entirety. Waterfront Park is clearly a highly valued amenity for people living in the region that also functions as an export service. This section of the report will look at this property of Waterfront Park in two different ways. First, we will look at the impact that Waterfront Park has on the Jefferson County economy via its usage by people coming from outside of Jefferson County and its surrounding counties. Second, we will examine the impact that the shift in spending by Jefferson County residents who don't live downtown as well as those who reside in the surrounding counties to downtown Louisville has on the downtown economy.

The Economic Impact of Nonlocal Visitors to Waterfront Park on the Jefferson County Economy

This analysis takes a very restrictive position as to what activity counts towards export oriented economic impact. We only include the visits by people who stated in the intercept survey that their primary reason for visiting Louisville was to come to Waterfront Park. We exclude those who responded that they came to Louisville for business, convention, or other pleasure/vacation reasons. While some who came for pleasure/vacation reasons may also have been attending events at Waterfront Park, we assume it was the event that drew them here, not the Park specifically. Whether or not any specific event would have occurred in Louisville (thus drawing visitors) without having been held at Waterfront Park is beyond the scope of this report. Therefore, we can view the results of the analysis as a bottom end estimate of Waterfront Park's impact.

IQS estimates that total annual visitation at Waterfront Park is in the range of 1.6 million to 3 million people. The intercept survey indicated that just under 22 percent of visitors came from outside of Jefferson County and the surrounding counties. Of those, 63 percent were overnight visitors to the Louisville area, while 37 percent were just spending the day in the region. Of the overnight visitors, just 3.6 percent said that their primary reason for visiting Louisville was to go to Waterfront Park. Of the day trippers, 22.6 percent said that they primarily came to Louisville to visit the Park.

Calculation of Local Waterfront Park Visits Relevant to Redistribution Spending Analysis

Minimum		Maximum		
1,600,000		3,000,000		Total Annual Visits
21.9%				Percentage Non-Regional Visits
349,920		656,100		Non-Regional Visits
63.0%		37.0%		Percent Overnight / Percent Day Trips
Overnight Visits		Day Trip Visits		
Minimum	Maximum	Minimum	Maximum	
220,520	413,474	129,400	242,626	Overnight Visits / Day Trip Visits
3.6%		22.6%		Primary reason for visiting Louisville was to come to Waterfront Park
7,873	14,761	29,257	54,858	Visits relevant to economic analysis

This narrows down the range of visits that are relevant to economic impact analysis considerably. Applying the percentages above to the range of total annual Park visits, we arrive at a range of between roughly 7,870 and 14,760 relevant visits by people who stayed overnight in the region, and a range of about 29,250 to 54,860 for relevant visits by people who stayed in the region just for the day.

The follow-up survey asked non-local visitors about their group's spending in five categories (transportation, lodging, dining, entertainment, and shopping). There were very few respondents who answered these questions who were primarily in town to visit Waterfront Park, while the majority were here for general pleasure/vacation reasons. Since it is likely that those people would spend similarly to the visitors who were here just for the Park on the days that they visited Waterfront Park, we used the survey results for all but the people here for business and conventions in calculating visitor spending profiles.

We estimate that overnight visitors spent an average of just over \$78 per person per visit to Waterfront Park. They spent roughly \$15.50 on transportation, \$32.60 for lodging, \$16.20 on dining, \$7.50 on entertainment, and \$6.30 shopping on average. Day trip visitors spent just a little bit less per person per visit to the Park than did the overnights, about \$75.60 per person for the day they were in town. They spent about \$12.70 on transportation, \$18.80 on dining, \$25.50 on entertainment, and \$18.60 shopping on average.

Economic Impact Relevant Spending by Waterfront Park Visitors to the Louisville Region

Average Spending per Person per Visit				
	Overnight		Day Trip	
Transportation	\$15.46		\$12.72	
Lodging	\$32.60		\$0.00	
Dining	\$16.24		\$18.86	
Entertainment	\$7.55		\$25.47	
Shopping	\$6.32		\$18.57	
Total	\$78.17		\$75.62	
Total Annual Spending by Waterfront Park Visitors				
	Overnight		Day Trip	
	Minimum	Maximum	Minimum	Maximum
Transportation	\$121,740	\$228,263	\$372,134	\$697,751
Lodging	\$256,669	\$481,255	\$0	\$0
Dining	\$127,827	\$239,677	\$551,785	\$1,034,597
Entertainment	\$59,465	\$111,497	\$745,237	\$1,397,318
Shopping	\$49,733	\$93,248	\$543,352	\$1,018,786
Total	\$615,435	\$1,153,941	\$2,212,508	\$4,148,452

These estimates align fairly well with recent estimates produced by industry consultants for the Louisville Convention and Visitors Bureau. There are three relevant studies available on the LCVB website, and their total spending estimates per person per day for overnight visitors range from \$139 to \$162, and for day trip visitors from \$47 to \$65. The differences from the Waterfront Park survey results lie mostly in the entertainment and shopping categories. The LCVB commissioned studies include business and convention travelers, who tend to spend much more in those categories when staying overnight than other travelers. We have this result in the Waterfront Park survey as well. The day trip visitors in this survey spend more in these categories, but this might be expected since people coming to a downtown location would likely seek out those kinds of venues more than people visiting other parts of the region just for the day. Many day trippers are here to visit relatives or are involved in specific family and child-centric activities (such as youth sports) that would lessen their spending on entertainment and shopping. We feel that the above estimates are reasonable per person per visit spending profiles.

Multiplying the spending profiles by the minimum and maximum estimates for Park visits by overnighers and day trippers gives us estimates for the total annual spending by category. Overnight visitors to the region add between \$615,000 and \$1.15 million in economic impact relevant spending to the Jefferson County economy. Day trip visitors add between \$2.2 million and \$4.1 million in economic impact relevant spending to the Jefferson County economy. This represents direct spending at downtown Louisville businesses.

We utilize the IMPLAN economic modeling program to estimate all of the spending effects in this report. IMPLAN is one of the most widely used regional input-output modeling systems in the world, used in thousands of studies. Input-output models are based upon detailed data describing how much each industry buys from every other industry in order to produce their output, in addition to the compensation they pay their employees and the taxes they pay. IMPLAN has details on 536 industries and associated commodities (goods and services) and includes a sophisticated county-to-county trade model so that it can predict how much each industry buys from every other industry in the state, as well as how much must be imported from outside the state to support a given level of production. Industry production creates household spending, as well as goods and services, through labor income, much of which is then spent on goods and services. IMPLAN models this through detailed data on personal consumption expenditures, creating detailed household spending patterns for each of nine household income groups.

Economic Impact on Jefferson County from Overnight Visitors to Waterfront Park

Impact Type	Employment	Labor Income	Value Added	Output
Minimum				
Direct Effect	5.8	\$187,466	\$306,669	\$499,664
Indirect Effect	1.3	\$62,319	\$106,827	\$182,166
Induced Effect	1.4	\$63,494	\$111,003	\$186,970
Total Effect	8.3	\$313,279	\$524,499	\$868,800
Maximum				
Direct Effect	10.8	\$351,498	\$575,005	\$936,870
Indirect Effect	2.3	\$116,847	\$200,301	\$341,560
Induced Effect	2.6	\$119,052	\$208,131	\$350,570
Total Effect	15.7	\$587,397	\$983,437	\$1,629,000
Impact Within Downtown Louisville				
Total Effect	Employment	Labor Income	Value Added	Output
Minimum	6.4	\$219,544	\$364,605	\$595,141
Maximum	12.0	\$411,646	\$683,635	\$1,115,889

The table above summarizes the annual economic impacts generated by the spending of out-of-town overnight visitors to Waterfront Park. We'll first briefly explain the row and column headings. Direct Effect refers to the change being modeled, in this case the downtown spending related to Waterfront Park visits. The Indirect Effect is the result of the linkages between businesses as they purchase inputs from each other (raw materials, transportation, electricity, tools, computers, insurance, etc.). When households purchase goods and services, businesses change their purchases from vendors, which may support changes in employment and payrolls. Of course, the vendors also purchase goods and services from each other, so that the total indirect effect includes all the inter-industry linkages. The Induced Effect refers to the impact via the spending of affected households. Regional sales of cars, groceries, building supplies, banking services, and so on are all sensitive to growth in disposable income, as are donations to nonprofit groups, churches, and charities. The induced effect includes the household spending of all households affected directly and by the indirect linkages. The Total Effect is the sum of the Direct, Indirect and Induced Effects.

Labor income includes fringe benefits (both privately provided, such as health insurance or retirement fund matches, and government provided, such as Social Security and Medicare payments) as well as proprietor income (e.g. self-employment and unincorporated small businesses). Value Added refers to the portion of the value of products that is not tied to the cost of purchased inputs. It is the difference between the sales value of a product or service and the value of all the purchased inputs, so it is the additional value gained during the production process. Since an input of one industry is the output of an industry upstream in the production process, focusing on value added avoids double counting. State level GDP, for example, is just the sum of the value added at all businesses in the state (not the sum of their output/sales). Output is usually just total sales, except for retail establishments. The merchant's cost for goods sold at retail is excluded from Output, which is why the direct output figures do not equal the total annual visitor spending in the previous table.

The spending of overnight visitors who were primarily in Louisville to visit Waterfront Park produces enough economic activity to support between 8 and 16 jobs across Jefferson County. Those jobs provide incomes totaling from \$310,000 to \$590,000 and add between half a million and a million dollars to the area's GDP. About 76 percent of the job impact and 70 percent of the other impacts occur within downtown Louisville (defined as the 40202 zip code, which captures most of what is usually considered downtown and the majority of Nulu).

Economic Impact on Jefferson County from Day Trip Visitors to Waterfront Park

Impact Type	Employment	Labor Income	Value Added	Output
Minimum				
Direct Effect	25.4	\$694,477	\$858,769	\$1,595,367
Indirect Effect	5.4	\$225,775	\$419,669	\$702,113
Induced Effect	4.9	\$232,384	\$406,225	\$684,285
Total Effect	35.8	\$1,152,635	\$1,684,662	\$2,981,764
Maximum				
Direct Effect	47.6	\$1,302,143	\$1,610,191	\$2,991,313
Indirect Effect	10.0	\$423,329	\$786,879	\$1,316,461
Induced Effect	9.3	\$435,720	\$761,671	\$1,283,033
Total Effect	67.0	\$2,161,191	\$3,158,742	\$5,590,808
Impact Within Downtown Louisville				
Total Effect	Employment	Labor Income	Value Added	Output
Minimum	27.6	\$802,285	\$1,079,775	\$1,946,730
Maximum	51.8	\$1,504,283	\$2,024,579	\$3,650,118

The annual spending of day trip visitors who were primarily in Louisville to visit Waterfront Park produces enough economic activity to support between 36 and 67 jobs across Jefferson County. Those jobs provide incomes totaling in the range of \$1.15 million to \$2.16 million, and add between \$1.7 million and \$3.2 million dollars to the area's GDP. About 77 percent of the job impact and 67 percent of the other impacts occur within downtown Louisville.

Economic Impact on Jefferson County from All Visitors to Waterfront Park

Total Effect	Employment	Labor Income	Value Added	Output
Minimum	44.1	\$1,465,914	\$2,209,162	\$3,850,564
Maximum	82.7	\$2,748,588	\$4,142,178	\$7,219,808

Impact Within Downtown Louisville

Total Effect	Employment	Labor Income	Value Added	Output
Minimum	34.0	\$1,021,829	\$1,444,381	\$2,541,871
Maximum	63.8	\$1,915,929	\$2,708,213	\$4,766,007

Altogether, out-of-town visitors to Waterfront Park have an annual impact on sales in Jefferson County of between \$3.8 and \$7.2 million, of which between \$2.2 million and \$4.1 million is unique value added. That activity supports 44 to 83 jobs in the county with incomes totaling \$1.4 million to \$2.7 million. Most of this impact occurs within downtown Louisville. Out-of-town visitors support between 34 and 64 jobs in downtown Louisville, with incomes totaling between \$1 million and \$1.9 million. Because of the restrictive way we defined which visitors were relevant to economic impact, these results can be seen as the very low end of the true Waterfront Park impact on Louisville.

There are also taxes collected when visitors spend money in the local economy and additional tax collections from local residents whose jobs are supported by visitor spending. The table below summarizes the economic impact related tax effects that are the most direct and easiest to quantify. There may be other tax impacts (such as property tax increases on homes and motor vehicles) but they are indirect and their relation to visitor spending is much harder to tease out. We therefore concentrate on taxes directly impacted by spending and incomes.

Economic Impact Related Tax Effects due to Non-Local Visitors to Waterfront Park

	Minimum	Maximum
Taxes Collected from Visitor Spending		
Jefferson County Transient Room Tax	\$21,817	\$40,907
State Transient Room & Sales Tax on Lodging	\$16,057	\$30,107
State Sales Tax	\$87,251	\$163,595
Taxes Collected from Local Residents due to Supported Jobs		
State Income Tax	\$39,580	\$74,212
State Sales Tax	\$46,909	\$87,955
Jefferson County Occupational Taxes	\$17,712	\$33,209
JCPS Occupational Tax	\$7,787	\$14,601

When visitors stay in paid lodging they pay a transient room tax to both the county and the state, as well as state sales tax. We estimate that visitors to Waterfront Park generate between \$21,000 and \$41,000 in room tax to Jefferson County and between \$16,000 and \$30,000 in room related taxes to the state (the latter figures reflect the fact that 20 percent of lodging was used by Kentuckians, who likely would have spent that money elsewhere in the state if not in Louisville, and paid sales tax). Visitors also pay state sales tax on their dining, entertainment, and shopping expenditures. We estimate that this spending generated between \$87,000 and \$164,000 in revenue for the state (again, these figures reflect the fact that 30 percent of non-local visitors were Kentuckians, who likely would have spent that money elsewhere in the state).

State income and sales taxes related to the jobs and incomes supported by visitor spending is derived via effective tax rates. Effective rates are the typical collections given the total value of incomes in a jurisdiction. We estimate that the state collects between \$39,000 and \$74,000 in income tax and between \$46,000 and \$88,000 in sales tax resulting from the household incomes supported by Waterfront Park tourism. The county and school occupational taxes are collected directly from income (for the most part), so the calculations are straightforward (we do adjust the school tax because it is only collected from county residents). We estimate that Waterfront Park tourism generates between \$18,000 and \$33,000 in county occupational tax and between \$8,000 and \$15,000 in school occupational tax.

Altogether, we estimate that the most direct state tax benefits from Waterfront Park tourism total somewhere between \$173,000 and \$326,000, while the most direct tax benefits to Jefferson County total between \$47,000 and \$89,000.

The Effect on Downtown Louisville of Redistributed Spending by Local Waterfront Park Visitors

In addition to acting as a draw to our city for travelers, Waterfront Park attracts many visitors from all the Jefferson County neighborhoods and surrounding counties. When local residents spend money in the Park or at neighboring businesses they are not adding new money to the local economy, we assume that they would have spent the same amount of money in other ways at businesses located elsewhere in the region. But Waterfront Park does act as a magnet redirecting spending away from the other areas of Jefferson County and the surrounding counties towards downtown Louisville.

The intercept survey indicated that just over 78 percent of visitors came from either Jefferson County or one of the surrounding counties. Of those, about 98 percent were not residents of downtown Louisville. Of the regional visitors who answered the question, approximately 86 percent said that their primary reason for visiting downtown on that day was to go to Waterfront Park. Applying the percentages above to the range of total annual Park visits, we arrive at a range of between about 1.06 million and 1.99 million visits by local people that are relevant to the analysis of the geographic redistribution of local spending.

Calculation of Local Waterfront Park Visits Relevant to Redistributed Spending Analysis

Minimum	Maximum	
1,600,000	3,000,000	Total Annual Visits
78.1%		Percentage Regional Visits
1,250,080	2,343,900	Regional Visits
98.3%		Percent Not a Downtown Resident
Minimum	Maximum	
1,228,204	2,302,882	Local Visitors not from Downtown
86.4%		Primary reason for visiting downtown was to come to Waterfront Park
1,061,659	1,990,611	Visits relevant to redistribution analysis

The follow-up survey asked local visitors about their group's spending in three categories (dining, entertainment, and shopping). Over three-quarters of the respondents who answered these questions were downtown primarily to visit Waterfront Park, so we were able to use spending estimates exclusively from this group in calculating visitor spending profiles. We estimate that local Park visitors spent an average of about \$21.70 per person per visit to Waterfront Park. Their spending was roughly evenly split, on average, between dining (\$7.50), entertainment (\$7.00), and shopping (\$7.20).

Redistribution Relevant Spending by Local Waterfront Park Visitors

	Average Spending per Person per Visit	
Dining	\$7.48	
Entertainment	\$7.01	
Shopping	\$7.17	
Total	\$21.66	
	Total Annual Spending	
	Minimum	Maximum
Dining	\$7,943,634	\$14,894,313
Entertainment	\$7,437,087	\$13,944,538
Shopping	\$7,614,175	\$14,276,578
Total	\$22,994,895	\$43,115,429

Multiplying the spending profiles by the minimum and maximum estimates for Park visits by locals not residing downtown gives us estimates for the total annual spending by category. Local Waterfront Park visitors shifted between \$23 million and \$43.1 million in spending from other areas of Jefferson County and surrounding counties to downtown Louisville.

Effect on Downtown Louisville of Redistributed Spending by Local Waterfront Park Visitors

Impact Type	Employment	Labor Income	Value Added	Output
Minimum				
Direct Effect	307.9	\$8,205,654	\$10,183,320	\$18,800,157
Indirect Effect	23.4	\$1,181,354	\$2,432,858	\$3,861,169
Induced Effect	1.5	\$69,224	\$122,939	\$198,836
Total Effect	332.8	\$9,456,232	\$12,739,118	\$22,860,162
Maximum				
Direct Effect	577.3	\$15,385,600	\$19,093,726	\$35,250,293
Indirect Effect	43.8	\$2,215,040	\$4,561,610	\$7,239,693
Induced Effect	2.9	\$129,796	\$230,511	\$372,818
Total Effect	624.0	\$17,730,436	\$23,885,846	\$42,862,804

This redirected spending has a significant effect on downtown Louisville. The shift in spending from the areas outside of downtown and surrounding counties to Waterfront Park and nearby businesses has an annual effect on sales in downtown Louisville of between \$22.8 and \$42.8 million, of which between \$12.7 million and \$23.9 million is unique value added. That activity is enough to support 333 to 624 jobs within the downtown area, with incomes totaling \$9.4 million to \$17.7 million. The upper end of these estimates represents about one percent of all jobs in the downtown area (and 0.4 percent of labor income).

It is important to note that a reorientation of local spending towards downtown Louisville does not imply a zero-sum situation. Nearly 20 percent of the spending comes from regional residents living outside of Jefferson County, 10.6 percent living in Indiana (Clark, Floyd, and Harrison counties) and 9 percent in the Kentucky counties adjacent to Jefferson County. Further, amenities in any part of the county will act to redirect some local spending to their immediate area, but still act as enhancements for the entire region. Finally, the kind of spending that occurs downtown (primarily retail, entertainment, and dining) by Waterfront Park visitors has similar effects countywide and regionwide no matter where it occurs in Jefferson County. That is, dollars spent dining out anywhere in the county will produce similar spinoff effects both in magnitude and geographic coverage. The following table shows the indirect and induced effects estimated for the rest of Jefferson County and the metro counties outside of Jefferson County that are the result of the downtown spending by local Waterfront Park visitors. Comparing to the previous table we see that the bulk of the indirect and induced effects will occur outside of downtown.

Effect on Downtown Spending by Local Waterfront Park Visitors on the Rest of Jefferson County and the Louisville MSA

Impact Type	Employment	Labor Income	Value Added	Output
The Rest of Jefferson County				
Minimum				
Indirect Effect	36.2	\$1,413,410	\$2,394,121	\$4,202,481
Induced Effect	56.7	\$2,657,329	\$4,643,263	\$7,829,846
Maximum				
Indirect Effect	68.0	\$2,650,144	\$4,488,977	\$7,879,651
Induced Effect	106.3	\$4,982,491	\$8,706,119	\$14,680,960
MSA Counties Outside of Jefferson County				
Minimum				
Indirect Effect	6.5	\$168,565	\$231,823	\$714,488
Induced Effect	18.5	\$876,037	\$1,618,854	\$2,973,610
Maximum				
Indirect Effect	12.1	\$316,058	\$434,667	\$1,339,664
Induced Effect	34.7	\$1,642,569	\$3,035,350	\$5,575,519

Close to a third of locals for whom visiting Waterfront Park was their primary reason for being downtown were there to attend a specific event, such as a concert, festival, or fundraiser. It is possible that it was the event that brought them downtown rather than Waterfront Park itself. But it is also the case that many, if not most, of these events would not have occurred at a downtown location except for Waterfront Park. Because our spending estimates are based in part on answers from people attending specific events they do partially incorporate this possibility. We therefore think that the results are a fairly accurate representation of the effect that Waterfront Park has on the geography of local spending patterns.

Because all of the spending comes from locals there is no tax effect from the jobs and incomes supported in the downtown area from the shift in spending from the other areas of Jefferson County and surrounding counties. There are likely indirect tax effects, most prominently arising from increased property valuation for several blocks surrounding Waterfront Park. But these effects are very difficult to separate out from other factors and are beyond the scope of the present study.

Waterfront Park is an important part of a package of amenities that Louisville has to offer its citizens and guests, and as such helps make Louisville an attractive place to live and locate a business. The findings in this section can be seen as the bare minimum impact that Waterfront Park has on the economic health of downtown Louisville and Jefferson County.

Perceptions of Waterfront Park

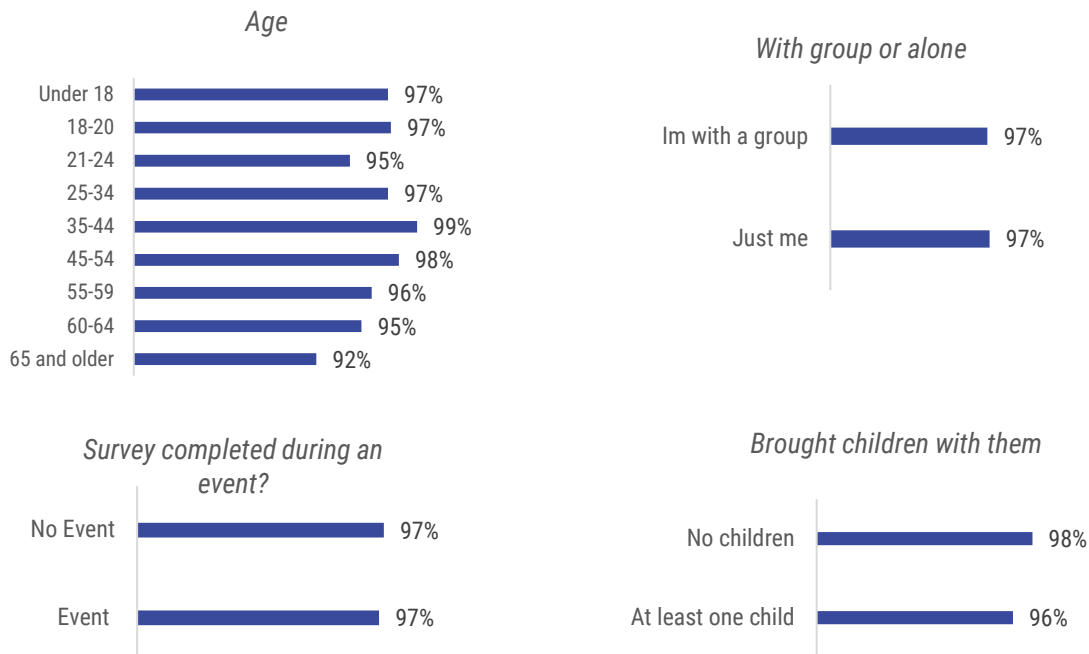
Satisfaction

Overall Satisfaction

Overwhelmingly, people are satisfied with their visits to Waterfront Park. Indicative of this is the 97% of park visitors who are likely to recommend (scored a 4 or 5) the park to friends or family. It should be noted that less than 1% of the respondents were not likely to recommend (scored a 1 or 2) the park. Park visitors regardless of age, event-driven and group composition are satisfied with their trip to Waterfront Park.

Waterfront Park excels at sending visitors home satisfied with their overall experience with the park.

"Based on your visit today, how likely would you be to recommend the park to friends and family?"



Different Aspects of the Waterfront Experience

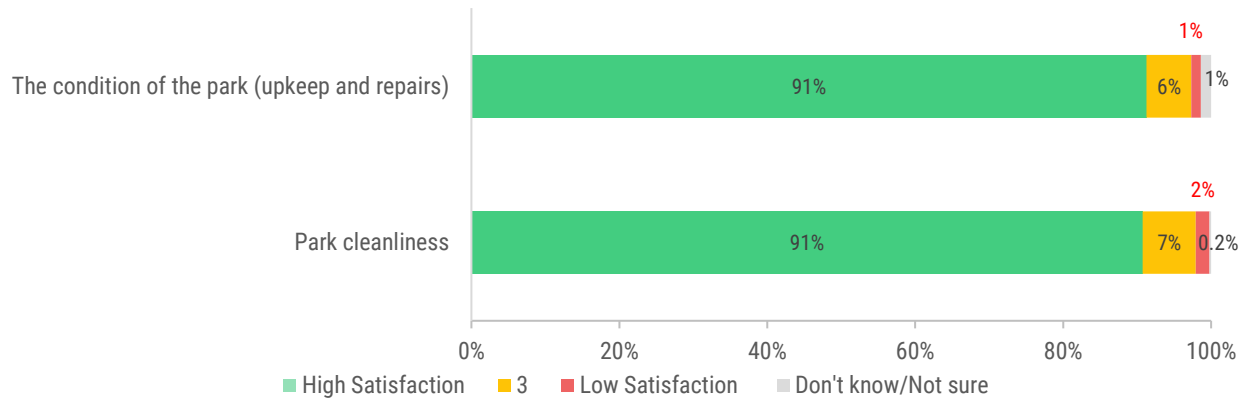
While visitors are satisfied overall with their trip to Waterfront Park, it is still important to examine the various aspects of their Waterfront Park experience.

Park Maintenance

Overall, people displayed a great deal of satisfaction with Park Maintenance. The two components for park maintenance are park cleanliness and the condition of the park. The distribution of the scores for both elements is nearly identical and very positive.

Waterfront Park visitors are highly satisfied with the conditions and cleanliness of the park.

Park maintenance

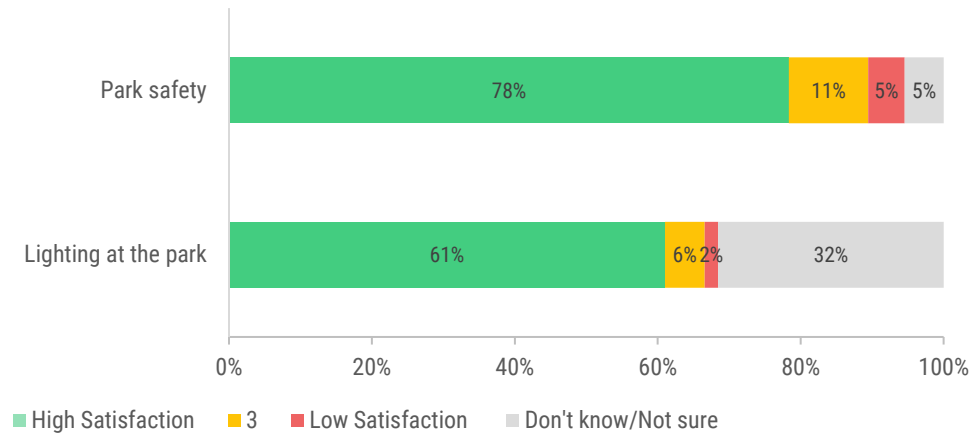


Safety

Overall, park visitors feel safe at the park. The two components are lighting at the park and park safety. When comparing the two components, we see the biggest discrepancies between the scores of “Don’t know/Not sure.” There is much more uncertainty surrounding park visitors’ knowledge level with lighting at the park.

Park visitors are highly satisfied with park safety.

Park Safety

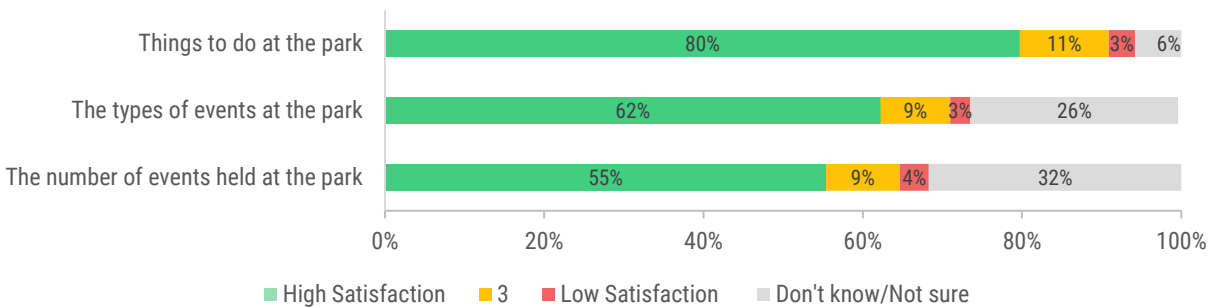


Supporting the park safety component score, nearly three out of four (74%) online survey respondents exhibited high agreement with the following statement, “I personally feel safe when I am in Waterfront Park.”

Events and Amenities

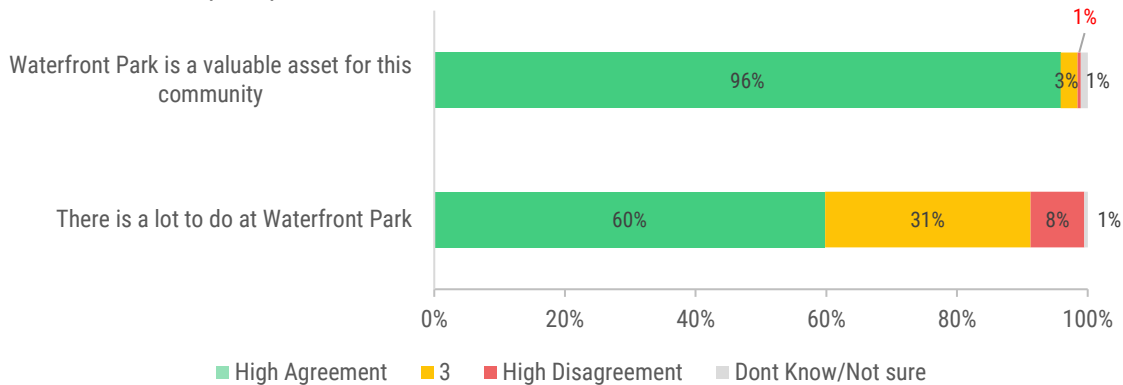
Park visitors are satisfied with the current activities at the park. However, park visitors feel there needs to be a larger variety of events held at Waterfront Park, and they would like for them to occur more frequently. The three components evaluated were the number of events held at the park, the types of events held at the park, and things to do at the park. When analyzing the individual components, we see park visitors' satisfaction was the highest with 'Things to do at the park'.

Park visitors are satisfied with the current activities at Waterfront Park, but want a larger variety in the types of events along with an increase in frequency.
Events and Amenities



Locals: Online survey participants who are local to the metro area answered a few questions concerning their perception of the value Waterfront Park adds to the Louisville Metro area community. While 96% of respondents agreed that “Waterfront Park is a valuable asset to the community”, only 60% exhibited high agreement with, “There is a lot to do at Waterfront Park.”

While locals agree that Waterfront Park is a valuable asset to the community, not all agree there is a lot to do at the park.
Locals' perception around Waterfront Park's value

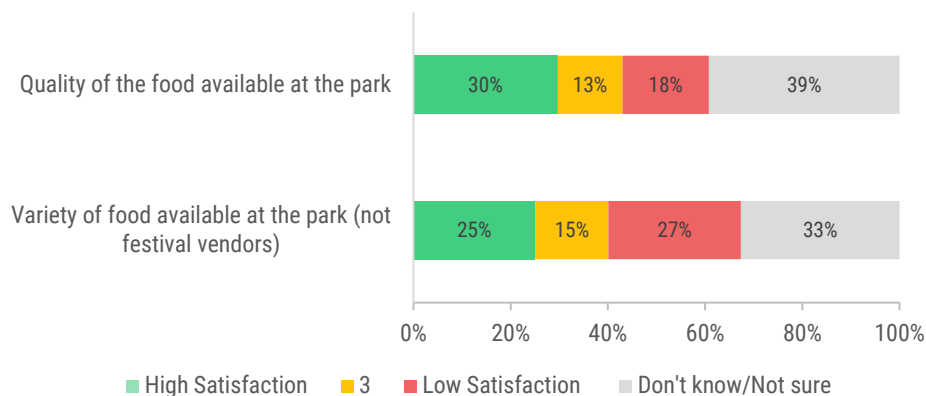


Food

Overall, park visitors are not satisfied with the food available at Waterfront Park. The two components for satisfaction with food at Waterfront Park are the variety and quality of the food available.

Visitors are generally not satisfied with the food available at Waterfront Park.

Food



Similar to the events and amenities, there is a substantial amount of uncertainty surrounding the food available at Waterfront Park. This uncertainty as expected comes primarily from out of town visitors. Only considering locals' scores, we see an increase in low satisfaction scores for both the quality of the food (30%) and variety of food available (25%).

Recommendations

The 61% of park visitors who assigned a score of '3' or below on any of the satisfaction components previously discussed were asked to elaborate why they assigned a low score to a park component. As expected, many respondents articulated the need for a wider variety of food options and better quality of food available at Waterfront Park.

The table below illustrates a sample of comments provided by respondents, again, a full list can be found in the appendix.

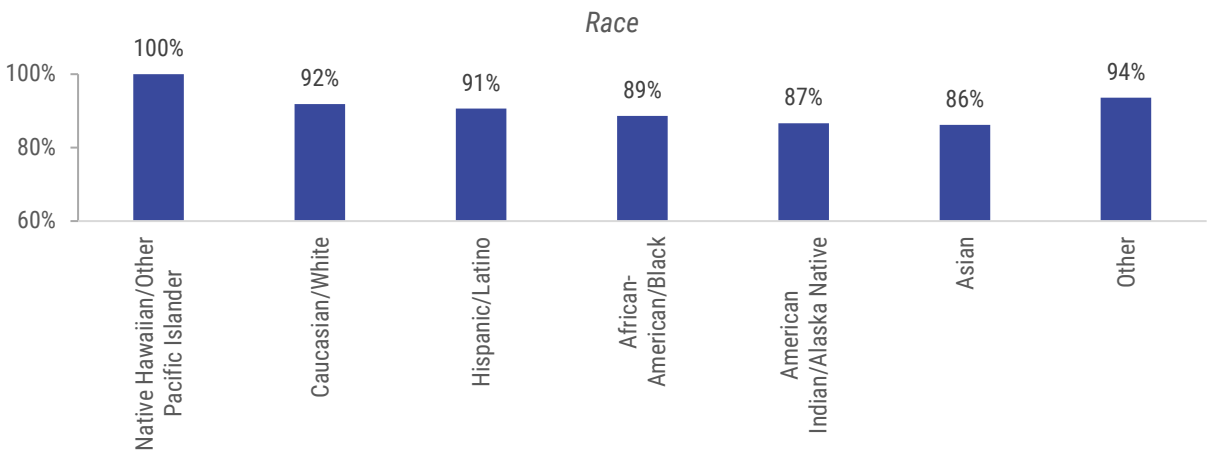
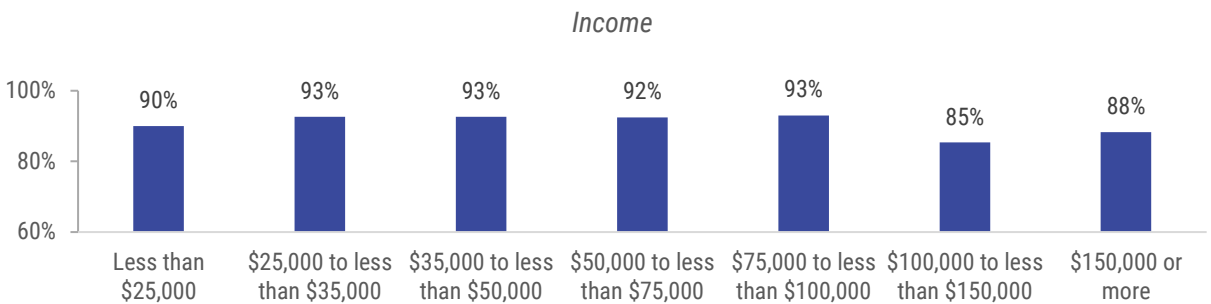
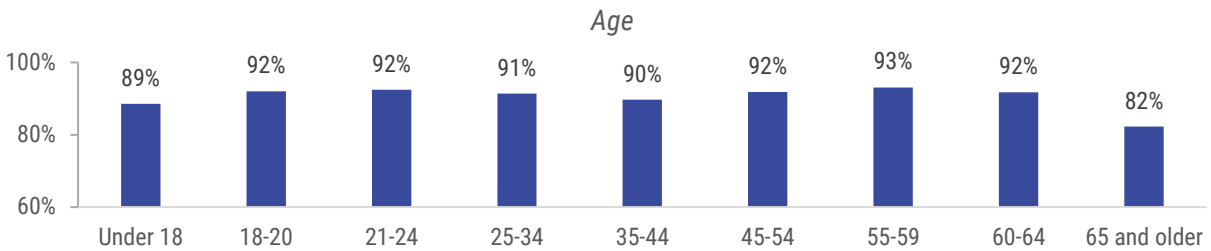
“Earlier you gave a low score for your satisfaction, can you elaborate on the reasons why you gave that low score?”

1	More food options
2	Better food options
3	Food trucks needed at park. On weekend days needed. Brings people to the park
4	Food variety and quality just hotdogs and icecream. Get food trucks to come down on the weekends
5	No healthy food
6	Bathroom dirty
7	Bathrooms are awful, but park is clean.
8	More events. Diversity of music, blues, soul music, buddy guy,
9	More lighting in areas with lots of foliage at night
10	Safety knew people beat up on bridge. Not good. New post not that helpful. Don't see roving patrols. Should be more for the money appropriations.see more bodies.
11	Safety. Time depends
12	Safety - downtown can't come too late
13	Shootings
14	Things to do- not a lot Number of events- doesn't know of many
15	Types of events- for younger people. Prefers events for older people

Inclusion

Park visitors of all ages, income levels, and races/ethnicities feel a sense of belonging; 91% of park visitors indicated high agreement (scored 4 or 5) with the following statement, "People like me visit Waterfront Park."

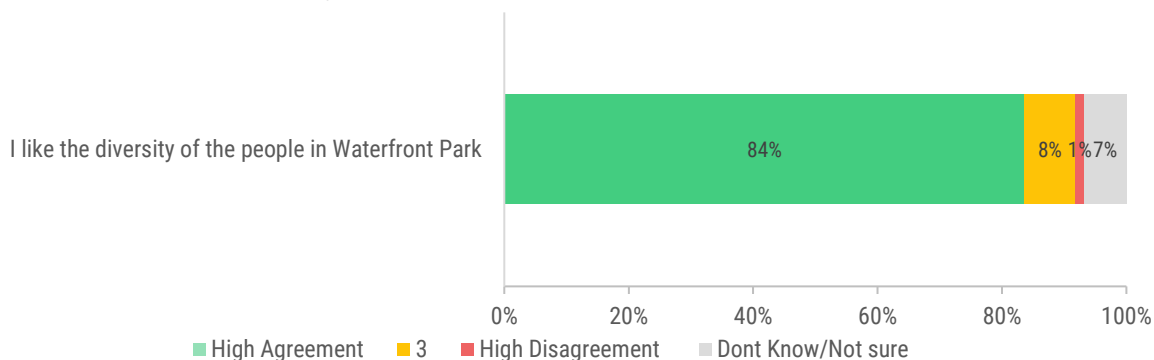
Park visitors of all ages, income levels, and ethnicities feel a sense of belonging.



Online survey respondents were asked to rate their level of agreement with, “I like the diversity of the people in Waterfront Park,” and 84% of these individuals specified a high agreement score (score of 4 or 5). In contrast, only 1% of online respondents indicated a high disagreement score.

Park visitors like the diversity of Waterfront Park.

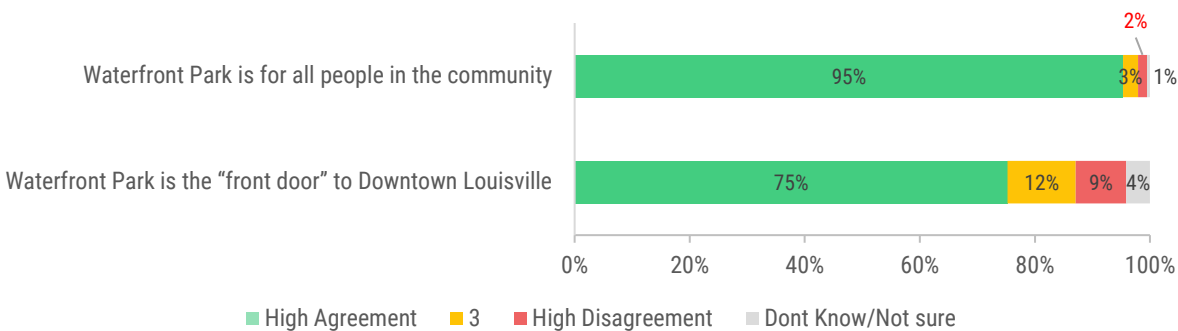
Satisfaction with diversity of park visitors



Locals: Locals were asked about their perception of inclusion at Waterfront Park. We found 75% of online survey respondents agree that Waterfront Park is the “front door” to Downtown Louisville and a place for all people in the community. When comparing the components, we see that 20% more respondents agreed that Waterfront Park is for all people in the community. Exclusively when evaluating the high disagreement scores, we see people are five times more likely to demonstrate high disagreement with Waterfront Park is the front door to Downtown Louisville than they are to say the same of, “Waterfront Park is for all people in the community” component.

The majority of local park visitors agree that Waterfront park is a place of inclusiveness and view it as the front door to Downtown Louisville.

Locals' perception of inclusion of Waterfront Park

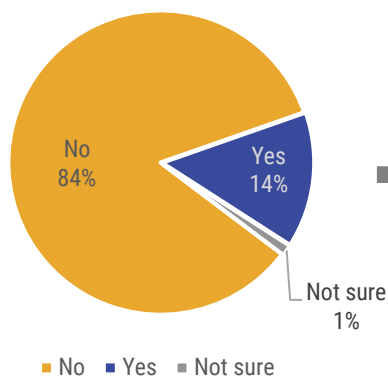


Marketing

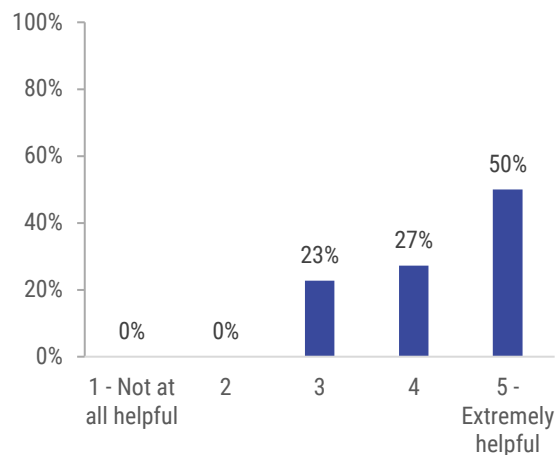
Website and social media: Online survey respondents were asked about their utilization and opinion of the Waterfront Park website. Only a small portion of park visitors reported to have visited the Waterfront Park website (14%). Of the minority of park visitors that did so, 77% found the website to be helpful. Furthermore, there was not a single individual who assigned a score of '1 - Not at all helpful' or '2'.

The minority of park visitors that visited the Waterfront Park website find it helpful.

"Did you visit the website before taking your trip to the park?"



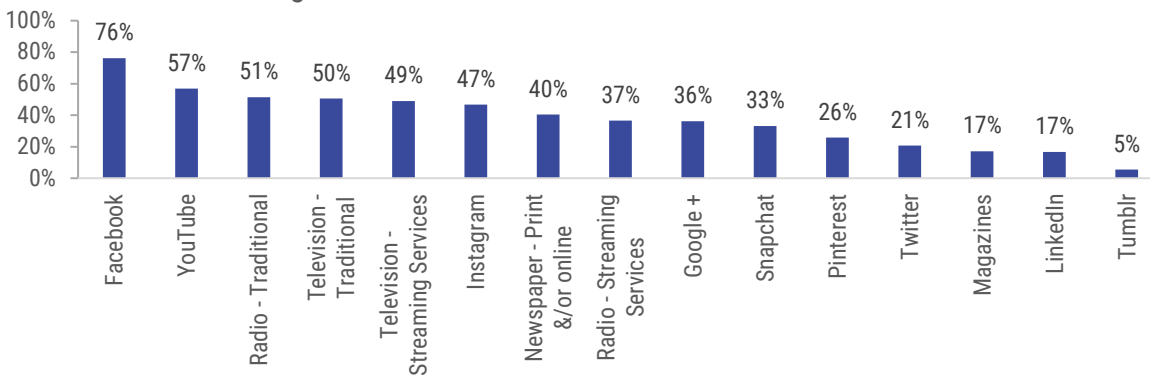
"How helpful was the website?"



Waterfront Park visitors interact with various media platforms. The most utilized media platform is Facebook (76%) while the least interacted media platform is Tumblr (5%).

Waterfront Park visitors interact with several different media platforms, with a large predominance using Facebook.

Social media usage



Interests: Waterfront Park visitors possess diverse interests. Online survey respondents were asked to specify areas/topics of interest; as illustrated by the table below, there are a wide variety of interests. Among the top scoring interests are outdoor activities, arts and culture, travel and health & fitness.

**“Which of the following topics and activities are of interest to you?
(Please check all that apply).”**

Outdoor Activities	78%	School & Education	48%
Arts and Culture	77%	Fashion & Style	38%
Travel	73%	Religious & Spiritual	36%
Health & Fitness	73%	Identity & Relationship	36%
Neighborhood & City	63%	Parenting	35%
Sports	53%	Gaming	31%
Animals & Pets	52%	News & Politics	29%
Home & Garden	52%	Cars & Motorcycles	23%
Science & Technology	49%	Business	21%