

Economic Impact of the Big Sandy Superstore Arena

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ECONOMIC IMPACT OF THE BIG SANDY SUPERSTORE ARENA

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Disclaimer:

The contents of this report reflect the views of the authors who are responsible for the accuracy of the data presented herein. The views expressed in this report are those of the authors and do not reflect the official policy or position of Marshall University or its governing bodies. The use of trade names, if applicable, does not signify endorsement by the authors.

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ECONOMIC IMPACT OF THE BIG SANDY SUPERSTORE ARENA

Executive Summary

Introduction

The Big Sandy Superstore Arena, located in Huntington, West Virginia, has hosted numerous concerts, family shows and other events—both ticketed and non-ticketed—in its 35 years of existence. These events attract thousands of attendees every year to the Huntington area. Patrons of Arena events, particularly those who do not live in the area, may participate in local activities—such as dining at a local restaurant, seeing area attractions and possibly staying overnight at a local hotel—while on their visit to the region.

Purchases made while participating in these and other activities provide monetary stimulation to the local economy. But the impact of this stimulation is not readily obvious. To best analyze this impact, financial data, attendee spending habits and other information must be collected and evaluated. As a result, the Center for Business and Economic Research (CBER) at Marshall University was contracted by the Big Sandy Superstore Arena to conduct an economic impact study of the effect of the Arena on the local economy.

Summary of Results

The outcome of the economic impact study conducted by the CBER includes the direct, indirect and induced effects of the Arena on the surrounding area. These effects are measured by five values:

- Full-time equivalent jobs
- Labor income
- Total value added
- Total output
- State and local tax revenue.

The estimated number of **full-time equivalent jobs** represents positions sustained each year. This figure does not represent the creation of new jobs on an annual basis. Additional activity would be required to increase the number of positions in the area.

Labor income, total value added, total output and state and local tax revenue are represented on an annual basis. For each effect (direct, indirect and induced), the amount of each of these four values is an estimation of the effect of the Big Sandy Superstore Arena on the surrounding area annually.

This is one of the best venues I have ever attended for a concert. ... The staff is very helpful and respectful to any concert goer's needs. Overall, a great place to watch a concert!

—2012 Attendee Survey Respondent

The **direct** effects of this analysis include an estimated:

- 136 full-time equivalent jobs sustained
- \$3.5 million in labor income per year
- \$4.7 million in total value added per year
- \$11 million in total output per year
- \$399,000 in state and local tax revenue per year.

The **indirect** and **induced** effects of this analysis totaled an estimated:

- 53 additional full-time equivalent jobs sustained
- \$2.1 million in labor income per year
- \$3.5 million in total value added per year
- \$6 million in total output per year
- \$611,000 in state and local tax revenue per year.

Overall, the **total impact** as a result of this analysis totaled an estimated:

- 190 full-time equivalent jobs sustained
- \$5.6 million in labor income per year
- \$8.3 million in total value added per year
- \$17 million in total output per year
- \$1 million in total state and local tax revenue per year.

In addition to the fiscal impacts on Huntington and the surrounding area resulting from the operation of the Big Sandy Superstore Arena, there are also an abundance of intangible benefits produced as a result of the Arena's presence. These benefits are difficult to quantify, yet this analysis would be remiss if the value of such benefits was left unspoken.

Introduction

The Big Sandy Superstore Arena is located in Huntington, West Virginia, and situated near the Ohio River (see map in Appendix A). Bordered by Ohio to the north and Kentucky to the west, Huntington is a host to many franchise and local businesses and had an estimated population of 49,253 as of a 2011 Census estimate (U.S. Census Bureau 2012).

Formerly known as the Huntington Civic Center and the Huntington Civic Arena, the groundbreaking ceremony for the \$7.5 million facility was held on March 29, 1976 (Herald-Dispatch 1976). The completed Arena was opened to the public on September 14, 1977 (Herald-Dispatch Civic Center Bureau 1977). Today, the Big Sandy Superstore Arena complex includes a large multi-use arena and a conference center made up of several rooms adaptable to the size and type of event being held.

The multi-use arena has a 7,500 person seating capacity, depending on seating arrangement and layout for events (Big Sandy Superstore Arena 2012). Concerts and performances, family shows, trade shows and sporting events are the most common events held at the Arena. Notable performances from artists such as Reba McEntire and Barry Manilow have brought thousands to the Huntington area from across the U.S. and Canada. Family shows, such as the Globetrotters and Sesame Street, are frequently held to provide family entertainment. Trade shows, such as the WSAZ Home and Garden show, attract residents of the Tri-State area each spring, and sporting events such as the West Virginia State High School Wrestling Tournament bring in thousands of patrons statewide.

*Always a wonderful
experience and fun time
for the family and myself.*

*—2012 Attendee Survey
Respondent*

The Conference Center provides more than 15,000 square feet of space divided into 10 main rooms (Big Sandy Superstore Arena 2012). Several of those rooms, such as the Riverside Suite, can be divided into smaller rooms or used in its entirety depending on the space needed for individual events. Catering services are available. A layout of the Conference Center is provided in Appendix B.

According to a 2011 memorandum by Brian Sipe, the Arena's General Manager, it was estimated that approximately 150,000 patrons¹ attended events at the arena and conference center in FY 2011 (Sipe 2011). Upgrades were made to the complex in 2011 from a \$4.5 million bond passed by the City of Huntington (Sipe 2011). The bond allowed the Arena to make a number of upgrades and improvements to the facility, including new seating, new HVAC units, dressing room and conference center renovations and technology upgrades. In addition to the bond money provided by the City, several lighting and other repairs were made throughout the complex in preparation of the 2011-2012 season (Sipe 2011).

¹ Sipe (2011) estimated between 150,000 and 200,000 attendees in this time period. Although more than 150,000 patrons may have visited the Arena during this time, stating this number will provide a conservative estimate.

Review of the Literature

The regional effect of civic centers and civic arenas such as the Big Sandy Superstore Arena are often analyzed through economic impact studies to determine the influence of these facilities on the local economy. As a result, literature pertaining to such studies is prevalent. A collection of these studies are consulted for supporting documentation of the economic contributions these facilities make to the surrounding communities and states. These economic contributions are quantified through business volume, employment, output, value added and tax revenue.

Monies spent on the goods and services provided within these civic centers produce business revenue. In turn, this revenue employs local residents not only at the centers themselves, but also in surrounding retail establishments, restaurants and hotels. State and local government units benefit from the industry's activity as well through the collection of taxes on the sale of goods and services and the employment income generated by these sales.

The existence of these types of venues in a local area can also benefit the community through the recapture effect. This effect is generated when dollars which could have "leaked" out of the state and local economy are recaptured by the existence of a facility such as a civic arena. This results in an increase in output, income and jobs in the surrounding area.

Evidence from the Literature

Tulsa's BOK Center has been a host to many concert performances by well-known artists and WNBA games. Since its opening in September 2008, net sales from tickets, concessions and merchandise exceeded \$115.7 million (Barber 2012). In this same timeframe, sales tax revenue remitted from the Center to the state and local government totaled nearly \$10 million, greatly benefitting the economy.

Events held at the Mayo Civic Center in Rochester, Minnesota, generated a regional economic impact of nearly \$113 million for Rochester and the surrounding area during the year 2008 alone (Mayo Civic Center 2008). At the time of the study, the Center was considering an expansion of its facilities. It was estimated that expanding the Center would provide an additional \$44 million in annual economic impact to the area, create 800 permanent jobs in the Rochester economy and contribute an additional \$1.5 million sales taxes each year to the State of Minnesota (Mayo Civic Center 2008).

The presence of a civic center does not only have a direct economic impact on a community; such establishments can also benefit other businesses in the community through indirect and

induced impacts by attracting visitors from other areas.

I just want to thank you all for bringing entertainment to us. It's always a blast to visit the BSSA for an event.

*—2012 Attendee Survey
Respondent*

Since the establishment of the Verizon Wireless Center in the Mankato community in Minnesota, an excess of 20 hospitality businesses have chosen to locate in Mankato and neighboring areas (Schooff 2012). An additional 60 service and professional

businesses have relocated to the vicinity of the Center since that time.

Not only do amenities like the Verizon Wireless Center attract businesses to the community, the Center is also a tool used by those businesses. Businesses indicated that the Center helps attract and retain the employment base of nearly 54,000 employees due to the lack of availability in the employees' home communities (Schooff 2012). Such measures play a sizable economic role by incentivizing businesses to invest and reinvest in the area.

Input-Output Modeling

A variety of economic modeling tools and software can be used to determine the economic impact of a civic center. An input-output software, such as the IMPLAN^{©2} and REMI^{©3} models, is one common example. A detailed description of the IMPLAN[©] software is provided in the "Methodology" section.

IMPLAN[©] was used in an economic impact study on the Asheville Civic Center in Asheville, North Carolina. Three categories—payroll expenditures, other operating expenditures and visitor spending—were used to establish the model (Ha 2006). The outcome produced dollar- and employment-effects on the local economy as a result of the presence of the Center. It was estimated that the Center had a direct effect of \$15.5 million and 295 jobs on the regional economy (Ha 2006). The indirect and induced effect of the Center totals approximately \$6.5 million and 73 jobs each year. State and local governments benefit from fiscal impact of the Center of an excess of \$4.2 million in tax payments each year.

We LOVE the Big Sandy Superstore Arena! It's so close to home and so many awesome performers and shows come! It's a fantastic opportunity!

*—2012 Attendee
Survey Respondent*

A recent study focused on the potential impact of expansion and renovation plans at the Wicomico Youth and Civic Center (WYCC) in Wicomico County, Maryland. As a result of the study, renovations and expansions to the WYCC could expect to increase spending resulting from the Center by approximately \$4.5 to \$5.8 million annually (Crossroads Consulting Services 2012). In addition to spending increases, it was estimated that between 50 and 70 new jobs would be created and that between \$445,000 and \$595,000 in state and county tax revenue could be expected (Crossroads Consulting Services 2012).

In a similar study, the REMI[©] modeling software was used to examine the economic impact of the Hartford Civic Center in Hartford, Connecticut. Parr et al. (2011) studied three renovation scenarios. As a result, it was estimated that an annual average increase of between 1,202 and 1,449 jobs and \$7.4 million and \$8.4 million in net state tax revenues could be expected over a 10-year time period (Parr, et al. 2011).

² IMPLAN[©] stands for IMPact analysis for PLANning. For more information, please visit the MIG IMPLAN website at <http://implan.com/v4/index.php>.

³ REMI[©] stands for Regional Economic Models, Inc. For more information, please visit the REMI website at <http://www.remi.com/>.

Conclusions Drawn from the Literature

As is evident in the literature, the economic impact of civic centers on both the state and local economy can be far-reaching. Whether directly or indirectly influenced by attendee spending, the impact of such centers includes both tangible and intangible contributions to the community. By providing employment, tax revenue, business volume and additional fiscal impacts these businesses are a vital component and a significant asset in the surrounding region.

Methodology

Data collected to analyze the impact of the Big Sandy Superstore Arena on the surrounding area include financial statements, ticket sales and employment figures supplied by the Arena, parking revenue supplied by the City of Huntington and spending patterns and other data categories collected in the attendee survey. An eight-county region spanning three states is specified for this report, including:

- Boyd County, Kentucky
- Cabell County, West Virginia
- Kanawha County, West Virginia
- Lawrence County, Ohio
- Lincoln County, West Virginia
- Mason County, West Virginia
- Putnam County, West Virginia
- Wayne County, West Virginia.

*Very nice, have loved
every experience.*

*—2012 Attendee
Survey Respondent*

With the exception of Boyd, Gallia and Kanawha, counties chosen as the study area for this report include Cabell and those comprising the immediate surrounding area. Gallia County is excluded due to the very limited border to Cabell County. Boyd and Kanawha counties are included due to population size (particularly of the cities of Ashland in Boyd County and Charleston in Kanawha County) and ease of access to Huntington via Interstate 64 (see map in Appendix A).

Specifying the region used for the economic impact model is very important, as selecting an area which is representative of typical local spending patterns helps produce the most thorough estimate possible. Expanding the study region beyond the eight counties selected will not likely add additional value to the analysis beyond capturing small amounts of existing leakages.

For the purpose of the economic impact, the model is based in the year 2009. Due to the recession occurring during that time, results of the economic impact are likely to be understated as compared to the true impact of the Arena today. This is beneficial in that the results of this analysis will produce a conservative estimate. Because these results may be used to determine future policy, taking care to not overestimate the impact of the Arena is a priority.

There is no other venue in the area that provides quality events and family entertainment to the community like the Big Sandy Superstore Arena. It is always a great experience for my family when we visit...

—2012 Attendee Survey Respondent

Zip Code Differentiation

Two pieces of this analysis—one stemming from the survey results and another from purchaser information⁴ provided by the Big Sandy Superstore Arena—rely on the use of zip codes to identify attendees on an in-region and out-of-region basis. Those attendees identified as in-region refer to individuals who specified zip codes within the eight-county focus area. Conversely, zip codes provided which are outside the boundaries of the eight-county focus area are considered out-of-region for the purpose of this analysis.

In many cases, whether a zip code lies within or outside the study area is obvious. However, because zip codes do not follow county lines, there are cases where the inclusion of a zip code inside or outside the specified region had to be distinguished. Whether the majority of the zip code was inside or outside the study area became the deciding factor. This method was used for both sets of zip codes and is

reflected as appropriate in each corresponding subsection to follow.

Appendix C illustrates the zip code and county lines for the study area. Red dots on the map indicate center points—or “centroids”—of each zip code. Blue shading indicates zip codes which were considered inside the study area for the purpose of this analysis while tan shading indicates zip codes which were not included in the analysis. In most cases, the centroid of each zip code either lies within this area or very near the study area boundaries.

The map in Appendix D illustrates 2010 ticket sales by zip code in 100, 200 and 300 mile radii from the Arena. Because more zip codes are provided from the Big Sandy Superstore Arena compared to those collected in the attendee survey, this map provides a more detailed illustration of the geographic areas from which Arena attendees are drawn. Appendix E provides a closer view of the draw within a 100-mile radius from the Arena.

Demographics and Economic Base

This report uses the most recent demographic and economic data available and maintains consistency in data years used to the extent possible. Unless otherwise specified, demographic, economic and employment data used in this report reflects the three-year average from 2009 to 2011 as obtained from the American Community Survey (ACS) of the U.S. Census Bureau.

Economic Impact Analysis

CBER uses the IMPLAN© regional economic impact software to analyze the impact of the Big Sandy Superstore Arena on Huntington and the surrounding area. Using social accounting matrices to estimate the economic impact, IMPLAN© analyzes the relationship between industries and socio-economic characteristics of the local economy resulting in an estimation of income, output and employment as well as direct, indirect and induced effects on the economy.

⁴ This information is representative of internet, phone and box office ticket sales for calendar year 2010.

To establish the model, a combination of data gathered from the Arena as well as responses to the Big Sandy Superstore Arena attendee survey are used.

Setup of the IMPLAN© Model

To establish the IMPLAN© model used in this analysis, the weighted average of each spending category was calculated as reported by out-of-region survey respondents. Per-respondent spending for both in-region and out-of-region survey respondents is provided in detail in the “Spending Patterns by Respondent Location” subsection in “Discussion of Results: Attendee Survey.” Spending estimations for only out-of-region respondents are added to the model due to the fact that those who live in the specified eight-county region would have likely spent money within the region regardless of whether or not they attended a Big Sandy Superstore Arena event. Including spending estimations for those individuals who live in this region in the model could, therefore, overestimate the indirect and induced spending attributable to the Arena.

Every event that I have attended at the Big Sandy Superstore Arena I have thoroughly enjoyed!

—2012 Attendee Survey Respondent

Total estimated attendance by out-of-region patrons to the Arena is calculated using total annual estimated attendance and the proportion of out-of-area respondents to the attendee survey. This proportion of respondents is weighted by each expenditure category, so that only the proportion of individuals who indicated spending in each category is being counted. Once this value is established, it is applied to the weighted average of each spending category to determine estimated annual spending⁵ in each sector for use in IMPLAN©.

Payroll figures supplied by the Big Sandy Superstore Arena are used to estimate full-time equivalence (FTE) for an annual employment number. To calculate this figure, the number of part-time employees must be translated to full-time equivalent positions. The summed FTE value for part-time employees is added to the number of full-time positions held at the Arena to calculate total annual FTE for use in the model.

Measurement of Direct, Indirect and Induced Effects

CBER uses the value of the output (spending on goods and services) from the presence of the Arena in the local economy to estimate the economic effects. This is the direct spending occurring in the local economy on supplies, equipment, labor and services. Direct spending in each of these areas creates re-spending throughout the region. Re-spending is also known as the multiplier effect.

Indirect spending stems from the direct spending, in that businesses that offer these goods and services in turn spend the money received as payment in other areas of the economy. In other words, the money from direct spending is re-spent elsewhere. As a result of indirect spending, the induced effect of the money being re-spent by households as income from employment (the

⁵ Attendee spending on parking is the only expense category which was not calculated using this method for the model. Estimated annual parking revenue for the year 2011 attributed to the presence of the Arena was supplied by the City of Huntington and this figure was substituted in lieu.

outcome of direct and indirect spending) is measured. The effects of each type of spending will be provided as a result of the model.

It is important to note that not all re-spending stays within the region. Instead, it is inevitable that some monies will be “leaked” out of the local economy (in this case the eight-county region) by way of state and federal taxes as well as goods and services imported from outside the specified region. This is addressed within the modeling software.

Always a great time!

*—2012 Attendee
Survey Respondent*

Attendee Survey

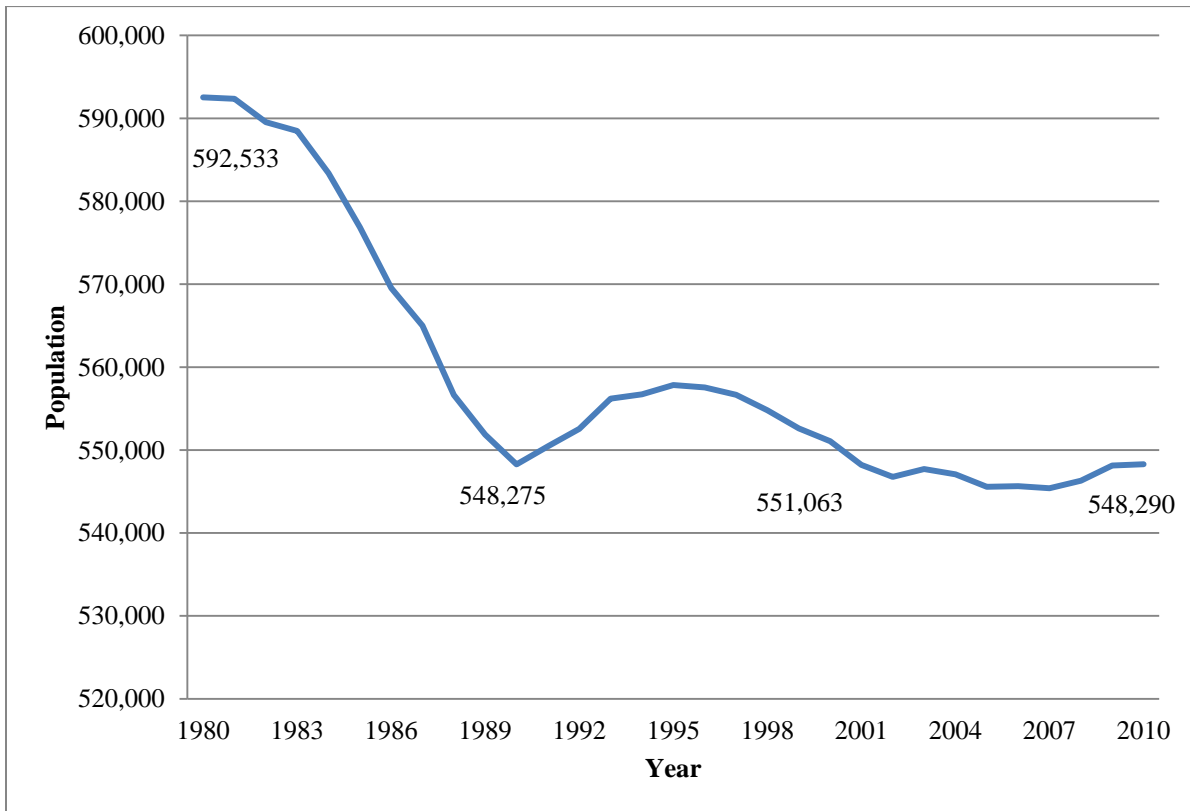
An online survey was made available to Big Sandy Superstore Arena attendees from November 1 to November 13, 2012 to better understand attendee spending at Arena events. Respondents to the survey were asked a number of questions to establish the frequency of visits to the Arena as well as to quantify typical spending while attending events. To estimate visitor spending patterns while attending events, respondents were asked to select purchases made both inside and outside the Arena during visits and to estimate expenditures for each purchase on a typical visit.

Each response to the survey was reviewed, and any responses which were incomplete or deemed to be excessive were discarded. The remaining valid surveys were aggregated. These results are discussed in the “Discussion of Results: Attendee Survey” section. A complete list of questions posed to respondents is provided in Appendix H.

Demographics and Economic Base of the Study Area

The population of the eight-county area of focus exceeded 592,500 individuals in 1980 (U.S. Census Bureau 2012). The number of individuals living in this area decreased to nearly 548,000 in 1990 (see Figure 1) and experienced a slight increase to 551,000 in 2000. In 2010, total population in this region exceeded 548,000 individuals (U.S. Census Bureau 2012). Over this 30-year period, the population of the eight-county area of focus has fallen by more than 44,000 people.

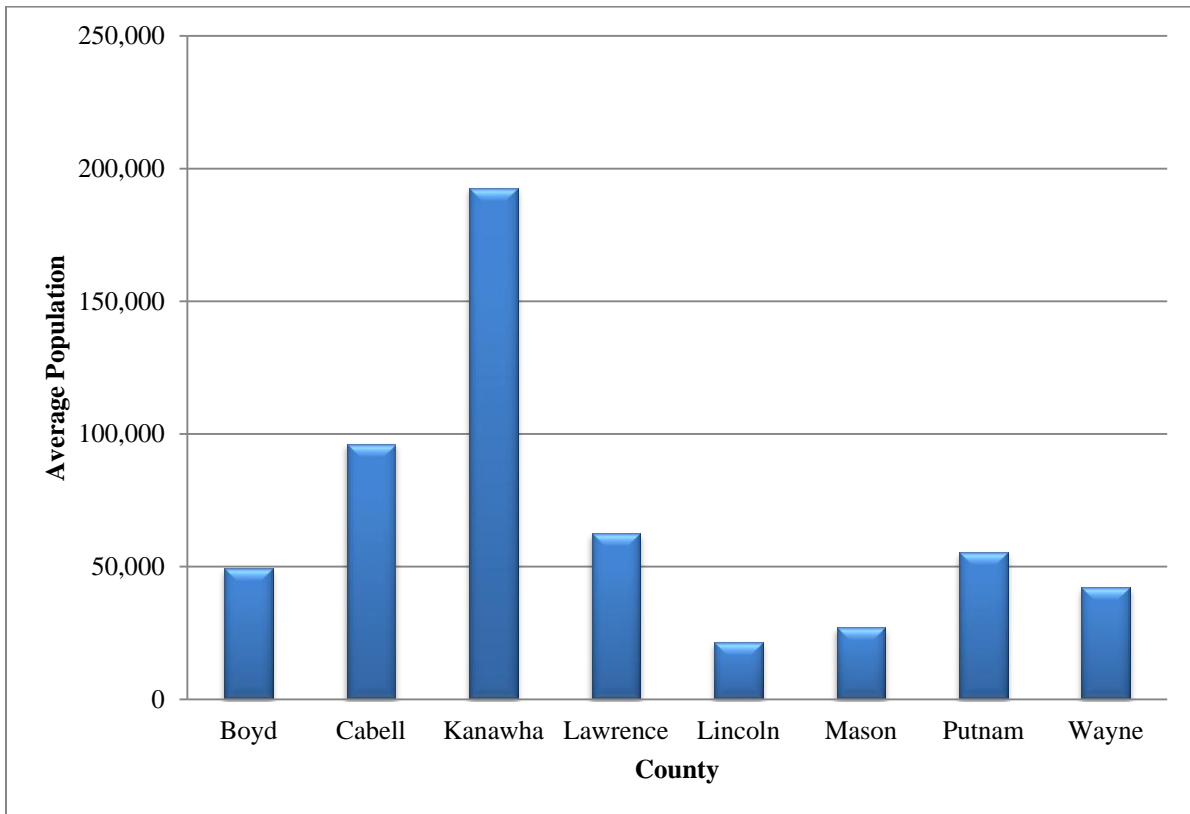
Figure 1 Population of Study Area



U.S. Census Bureau, 2012.

On a per-county basis, Kanawha County has the largest population (192,818 people) as of the three-year average from 2009 to 2011 (ACS 2012). Lincoln County has the smallest population (21,684 people). The average study area population by county for this time period is provided in Figure 2.

Figure 2 Average Study Area Population by County



2012 American Community Survey (ACS): 3-year average 2009-2011.

Age

Table 1 provides the population of each county in the study area by age group. In seven of the eight counties, the most populated age group as of the 2009 to 2011 three-year average is comprised of individuals aged 45 to 54 years old (ACS 2012). Cabell County is the exception; individuals aged 25 to 34 years old make up the largest age group in this county.

Table 1 Population of Study Area Counties by Age Group

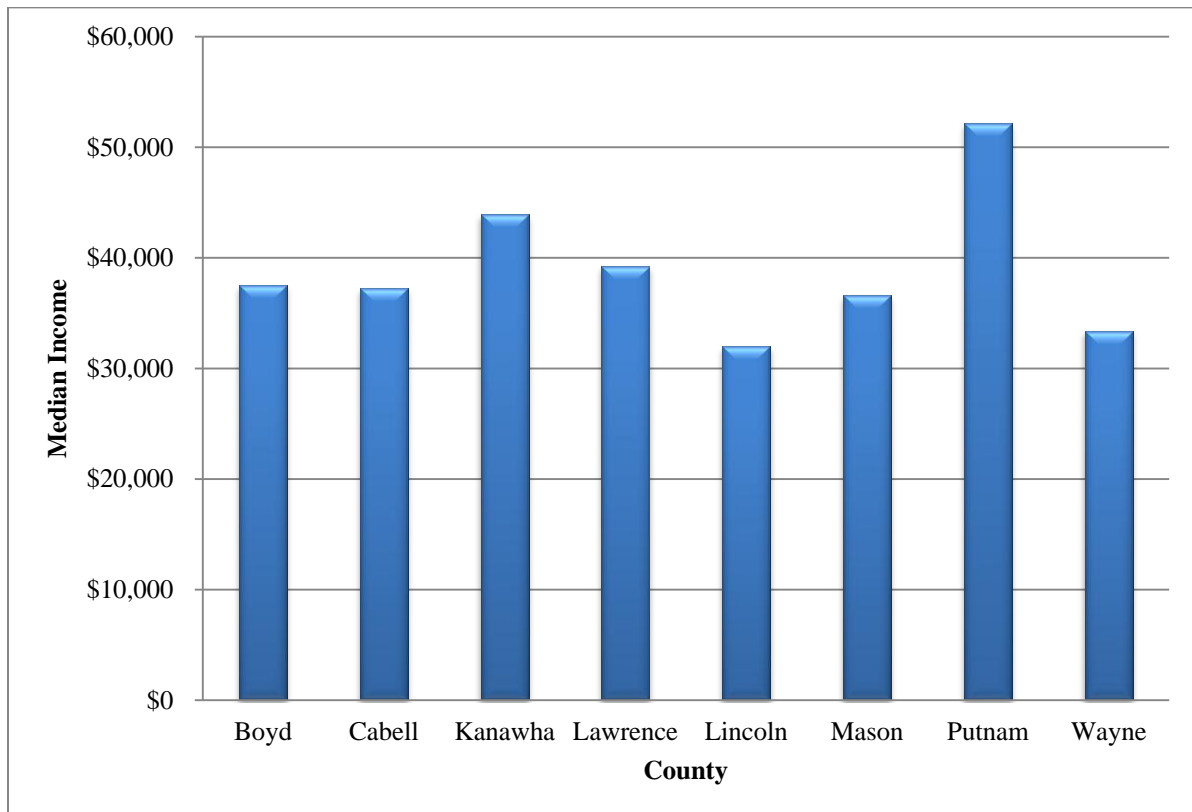
Age Group	Boyd	Cabell	Kanawha	Lawrence	Lincoln	Mason	Putnam	Wayne
Under 5 years	2,868	5,420	10,679	3,869	1,374	1,578	3,402	2,334
5 to 9	2,807	4,586	11,527	4,619	1,116	1,339	3,530	3,082
10 to 14	3,071	5,765	10,776	3,654	1,546	1,939	3,771	2,169
15 to 19	3,100	6,680	11,003	4,150	1,322	1,509	3,423	2,773
20 to 24	2,565	8,777	10,792	3,434	1,090	1,409	2,596	2,216
25 to 34	6,010	13,106	23,834	7,533	2,559	3,271	6,464	4,849
35 to 44	6,585	11,594	23,947	8,320	2,926	3,437	7,751	5,667
45 to 54	7,534	12,670	29,452	9,025	3,345	4,290	8,707	6,218
55 to 59	3,489	6,443	16,031	3,912	1,627	2,289	4,277	2,840
60 to 64	3,185	5,997	12,370	4,255	1,519	1,574	3,625	3,153
65 to 74	4,485	7,893	17,049	5,548	1,949	2,645	4,767	3,949
75 to 84	2,893	5,762	10,914	3,239	902	1,461	2,597	2,499
85 years and over	888	1,668	4,444	966	409	568	691	642

2012 American Community Survey (ACS): 3-year average 2009-2011.

Income

The three-year average median household income in the eight-county study area ranged from \$31,989 in Lincoln County to \$52,165 in Putnam County (ACS 2012). Average median household income in the study area is approximately \$39,024 for this time period. Figure 3 illustrates this data.

Figure 3 Median Household Income of Study Area Counties

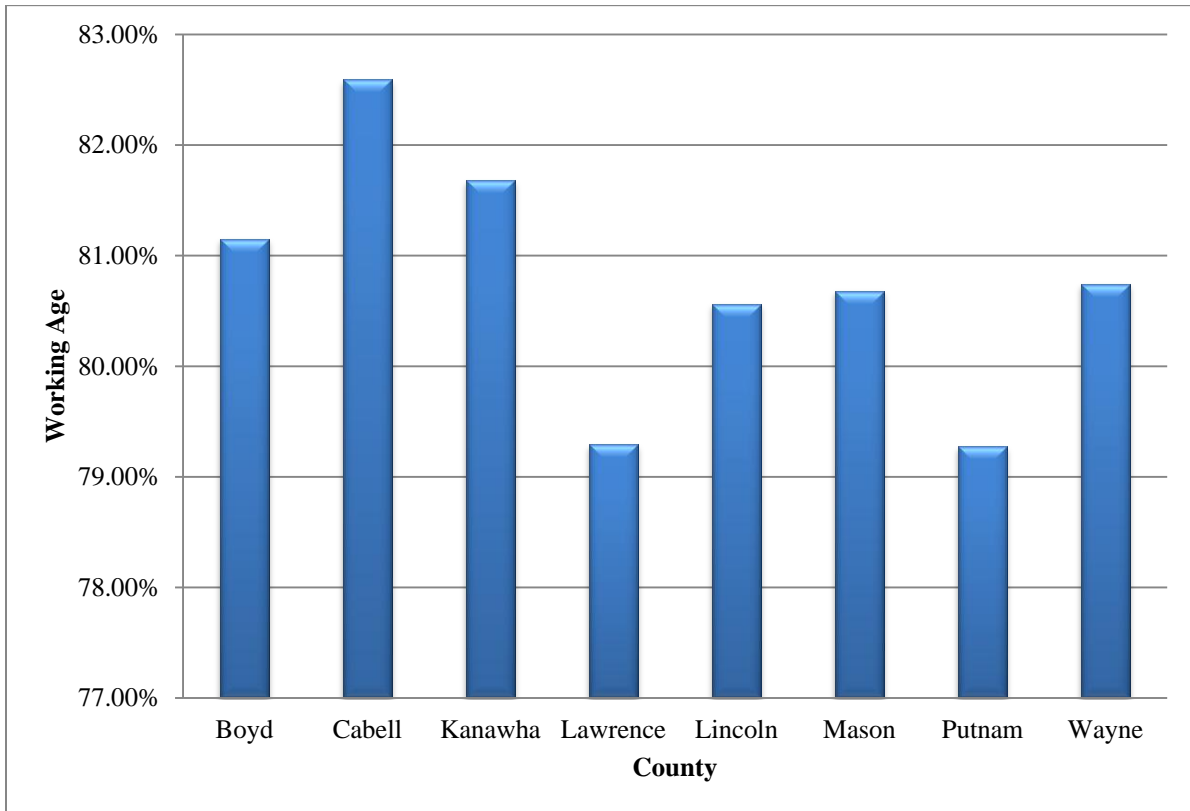


2012 American Community Survey (ACS): 3-year average 2009-2011.

Labor Force

Nearly 83 percent of individuals in Cabell County are of working age (16 years of age and older) as of the three-year average⁶ from 2009 to 2011, making it the county with the highest percent of working age individuals in this region (ACS 2012). Just over 79 percent of individuals in Lawrence County are of working age. On average, nearly 81 percent of individuals are of working age in the study area overall. These percentages are reflected in Figure 4.

Figure 4 Percentage of Individuals of Working Age in the Study Area



2012 American Community Survey (ACS): 3-year average⁷ 2009-2011.

⁶ Labor force data for Lincoln and Mason counties is unavailable for the three-year average from 2009 to 2011. The five-year average from 2007 to 2011 for these counties is substituted in this subsection only.

⁷ *Ibid.*

Although individuals who are of working age (16 years of age and older) are eligible to be included in the labor force, not all are actively participating. The labor force is comprised of those who are willing and able to work and is represented as the sum of those employed and those unemployed in the population (BLS 2012). The remainder of individuals—those who are retired, students, providing care for children or other family members and any others who are not currently employed or seeking employment—are categorized as not in the labor force (BLS 2012).

Of those individuals who are of working age in the study area, approximately 48.7 percent on average are employed and nearly 5 percent are unemployed (ACS 2012). The remaining 46 percent of these individuals, on average, are not currently in the labor force. Table 2 provides these percentages for each county in the study area.

Table 2 Labor Force Participation by County for Study Area

	Employed	Unemployed	Not in Labor Force
Boyd	43.88%	6.83%	49.29%
Cabell	51.47%	4.61%	43.92%
Kanawha	56.06%	4.71%	39.23%
Lawrence	49.81%	4.99%	45.20%
Lincoln	39.25%	4.30%	56.45%
Mason	46.24%	4.33%	49.43%
Putnam	56.80%	3.30%	39.89%
Wayne	45.81%	4.13%	50.06%

2012 American Community Survey (ACS): 3-year average⁸ 2009-2011.

Discussion of Results: Economic Impact

Operating Impact

The operating impact of the Big Sandy Superstore Arena on the eight-county study area is determined by the direct, indirect and induced effects calculated by the IMPLAN© software. These effects are measured in four main categories:

- Employment
- Labor income
- Value added
- Output.

⁸ *Ibid.*

In this model, employment is measured in full-time equivalent (FTE) employment and measures the number of full-time equivalent positions being directly and indirectly affected by the presence of the Arena as well as those positions induced as a result of indirect spending. Employment numbers provided in the following results section reflect FTEs, so it is important to note that both full- and part-time positions are included.

*I always have a blast
[at] the Big Sandy
Superstore Arena!!*

*—2012 Attendee
Survey Respondent*

Labor income is inclusive of all types of employment income. This includes employee compensation, such as wages and benefits, as well as proprietor income (MIG 2012). Total output reflects the value of industry production (MIG 2012).

Value added is slightly more involved. MIG, Inc., the creators of the IMPLAN© economic impact software, defines value added as

“the difference between an industry’s or an establishment’s total output and the cost of its intermediate inputs. It equals gross output (sales or receipts and other operating income, plus inventory change) minus intermediate inputs (consumption of goods and services purchased from other industries or imported” (MIG 2012).

This category includes such criteria as compensation of employees, taxes on production and imports less subsidies and gross operating surplus (MIG 2012).

Direct, Indirect and Induced Output

The IMPLAN© model computes the direct, indirect and induced impact resulting from the presence of the Arena on the specified eight-county region. Output from the model is measured by employment, labor income, value added to the economy and total monetary output, shown in Table 3. As a result of this model, it is estimated that a total of 190 jobs are attributed to the presence of the Big Sandy Superstore Arena. Approximately 136 of these jobs result from direct employment.

Table 3 Economic Impact of the Big Sandy Superstore Arena: Output

Impact	Employment	Labor Income	Total Value Added	Output
Direct Effect	136.3	\$3,463,613	\$4,778,514	\$10,949,632
Indirect Effect	25.8	\$1,051,406	\$1,664,180	\$2,937,795
Induced Effect	27.5	\$1,038,129	\$1,866,221	\$3,065,028
Total Effect	189.7	\$5,553,147	\$8,308,915	\$16,952,455

Total labor income stemming from total employment exceeded \$5.5 million. Roughly 62 percent of total labor income results from direct effects of the Arena while nearly 38 percent of total labor income results from indirect and induced effects (approximately 19 percent each). Overall, the total effect of the Arena on the specified region is estimated to be nearly \$17 million.

Due to the number of people drawn into Huntington for Arena events, local businesses realize a noticeable increase in patronage and plan for additional staffing around the Arena event schedule. The impact of the Arena on local businesses is evident from manager testimony. According to Rob McCleery, General Manager for the *Max & Erma's* restaurant located at Pullman Square, “There is a positive impact. ... We keep a handle on when things are going on over there. It has an impact” (McCleery 2013).

Top 10 Sectors

The IMPLAN© software identifies the top 10 industries (or sectors) affected as a result of the Arena’s impact. The software provides the top 10 ranking industries by four categories:

- Employment
- Labor income
- Value added
- Output.

Industries most affected by employment are provided in Table 4. The “promoters of performing arts and sports and agents for public figures” industry—the industry in IMPLAN© in which facilities such as the Big Sandy Superstore Arena is identified—is ranked highest by employment with 77 employees. The “food services and drinking places” industry is ranked second highest; approximately 47 positions are created in this industry in the local economy as a result of the Arena. Other sectors in the top 10 ranking include private hospitals, health practitioners’ offices, and “civic, social, professional and similar organizations” where approximately two positions are created in each industry.

Table 4 Top 10 Sectors by Employment

Sector/Industry	Total Employment
Promoters of performing arts and sports and agents for public figures	76.9
Food services and drinking places	46.8
Hotels and motels, including casino hotels	11.7
Retail Stores - General merchandise	5.8
Retail Stores - Gasoline stations	2.6
Real estate establishments	2.5
Insurance agencies, brokerages, and related activities	2.4
Private hospitals	1.9
Offices of physicians, dentists, and other health practitioners	1.6
Civic, social, professional, and similar organizations	1.5

Industries most affected by labor income are provided in Table 5. As with sectors most affected by total employment, the “promoters of performing arts and sports and agents for public figures” industry is the largest by labor income (approximately \$2.2 million) and the “food services and drinking places” sector is second largest by labor income (approximately \$887,000). The tenth largest sector by labor income is “management, scientific and technical consulting services,” estimated at just over \$61,000.

Table 5 Top 10 Sectors by Labor Income

Sector/Industry	Total Labor Income
Promoters of performing arts and sports and agents for public figures	\$2,201,998
Food services and drinking places	\$887,062
Hotels and motels, including casino hotels	\$304,356
Retail Stores - General merchandise	\$157,980
Offices of physicians, dentists, and other health practitioners	\$137,108
Insurance agencies, brokerages, and related activities	\$125,155
Private hospitals	\$122,721
Wholesale trade businesses	\$87,808
Retail Stores - Gasoline stations	\$71,565
Management, scientific, and technical consulting services	\$61,398

Industries most affected by total value added are provided in Table 6. The “promoters of performing arts and sports and agents for public figures” and “food services and drinking places” sectors (estimated to be \$2.8 million and \$1.3 million, respective) remain the two largest industries when sorted by total value added. The “insurance carriers” sector is the tenth largest industry by total value added, estimated at nearly \$140,000.

Table 6 Top 10 Sectors by Total Value Added

Sector/Industry	Total Value Added
Promoters of performing arts and sports and agents for public figures	\$2,834,765
Food services and drinking places	\$1,256,863
Hotels and motels, including casino hotels	\$542,585
Imputed rental activity for owner-occupied dwellings	\$332,130
Retail Stores - General merchandise	\$257,054
Real estate establishments	\$235,754
Insurance agencies, brokerages, and related activities	\$178,590
Wholesale trade businesses	\$150,770
Offices of physicians, dentists, and other health practitioners	\$146,266
Insurance carriers	\$139,638

Industries most affected by total output are provided in Table 7. The largest sector by total output is the “promoters of performing arts and sports and agents for public figures” industry with an estimated total output of more than \$6.1 million. The “food services and drinking places” sector is second largest at an estimated \$2.6 million in total output. The sector including “offices of physicians, dentists and other health practitioners” is tenth largest by total output, estimated to be nearly \$237,000.

Table 7 Top 10 Sectors by Total Output

Sector/Industry	Total Output
Promoters of performing arts and sports and agents for public figures	\$6,120,093
Food services and drinking places	\$2,591,182
Retail Nonstores - Direct and electronic sales	\$1,156,243
Hotels and motels, including casino hotels	\$1,102,561
Imputed rental activity for owner-occupied dwellings	\$436,437
Real estate establishments	\$325,395
Retail Stores - General merchandise	\$292,138
Private hospitals	\$273,260
Insurance agencies, brokerages, and related activities	\$263,567
Offices of physicians, dentists, and other health practitioners	\$236,864

Overall, the “promoters of performing arts and sports and agents for public figures” and “food services and drinking places” industries maintained first and second place ranks in each of the four categories. The hotels and motels industry was ranked third by employment, labor income and total value added and was ranked fourth by total output.

Tax Revenue and the Tax Model

The State of West Virginia benefits from State and local revenue generated from the Big Sandy Superstore Arena and the spending supported through its activities. The total estimated amount of tax revenue created by direct employment is \$399,621. When indirect and induced employments are included, total estimated tax revenue exceeds \$1 million.

The amount of additional tax dollars attributable from direct, indirect and induced income produced from operation of the Arena is provided in Table 8. It should be noted that the “recapture effect” is not considered in this report and therefore these estimates are conservative in the regard that the Arena may very well keep in-state tourists here rather than traveling elsewhere for similar experiences and/or events.

This tax revenue can be attributed to the presence of the Big Sandy Superstore Arena and the direct, indirect and induced employment it supports. This revenue is beneficial to the State of West Virginia and the local area.

Table 8 Impact of the Big Sandy Superstore Arena on West Virginia Tax Revenue

	Direct	Total
Initial Business Taxes	\$222	\$563
Business Taxes	\$70,224	\$177,621
Consumer Sales & Use Taxes	\$114,064	\$288,506
Personal Taxes	\$158,262	\$400,297
Excise Taxes	\$54,655	\$138,240
Miscellaneous Fees and Transfers	\$1,593	\$4,029
Taxes Collected by Counties	\$600	\$1,518
Total	\$399,621	\$1,010,774

It is important to note that this tax revenue estimation only includes the impact on the State of West Virginia. Because of limited payroll detail of employees who live in other states, namely Kentucky and Ohio, calculating a similar tax revenue impact for these two states would prove difficult. For purposes of this report, the impact of tax revenue calculated here is indicative of income the State of West Virginia would receive only.

Discussion of Results: Attendee Survey

A sufficient number of responses to the attendee survey were provided to ensure that the results are statistically significant. What follows in this section is a discussion of the survey results in detail. The first four subsections (and subsequent parts of each subsection) discuss survey results by all respondents. The fifth subsection, “Discussion of Survey Results by Region,” discusses survey results for those respondents inside and outside the eight-county study area.

Survey Respondent Spending at Arena Events

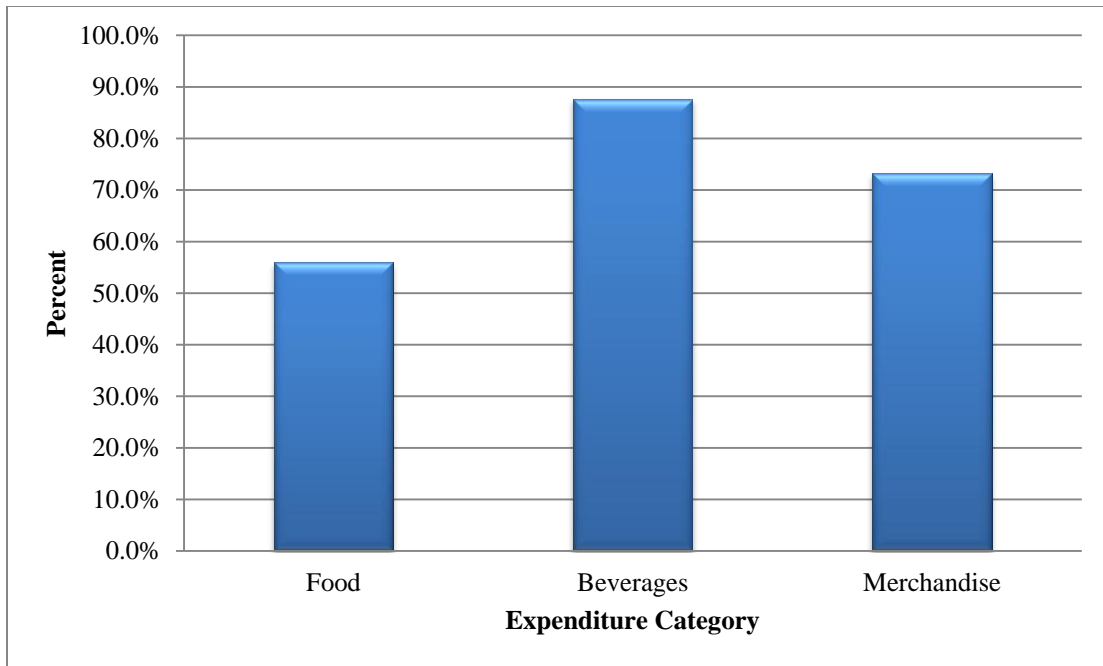
Survey respondents were asked a variety of questions to analyze typical spending habits and patterns while attending Arena events. These questions were divided between purchases made while inside the Arena (such as food and beverage concessions and merchandise) and those made outside the Arena (such as visiting a restaurant or staying overnight in an area hotel) while attending a typical event. Once aggregated by attendee spending categories, a weighted average⁹ of per respondent spending was calculated for each expense. It is important to note that those responses which were deemed excessive were removed from the calculations to provide a conservative estimate.

⁹ Because not all survey respondents participated in and spent money on every expenditure listed, it is not assumed that this rate applies to all visitors of Arena events.

Spending Inside the Arena

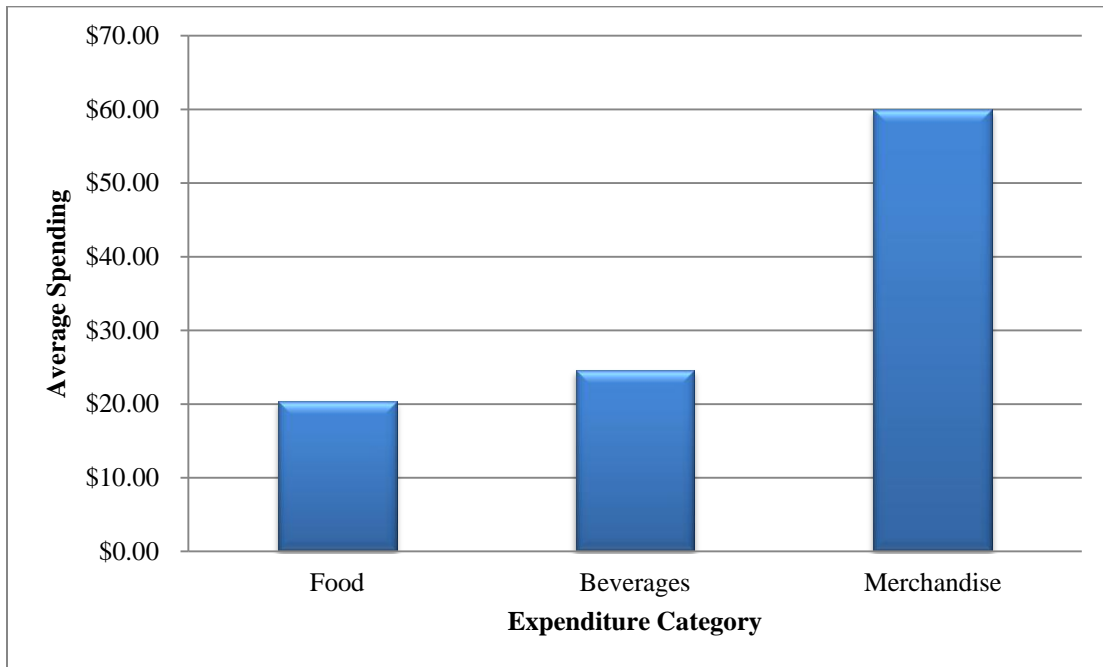
Three expenditure categories were used to estimate attendee spending inside the Arena while attending a typical event. Respondents were first asked whether purchases in any of the three expenditure categories were made while attending a typical event at the Arena. Nearly 88 percent of attendees answered that they typically purchase beverages during events and 73.2 percent typically purchase merchandise. Approximately 56 percent of attendees typically purchase food at Arena events. The breakdown of in-Arena purchases is provided in Figure 5.

Figure 5 In-Arena Purchases by Respondents during a Typical Arena Event



As a follow-up, respondents were asked to quantify the amount typically spent in each category during a typical event at the Arena. The weighted average of the spending was then calculated to determine average per-person spending at a typical Arena event. On average, attendees spent \$20.41 on food, \$24.58 on beverages and \$60.03 on merchandise per respondent while inside the Arena. These values are provided graphically in Figure 6.

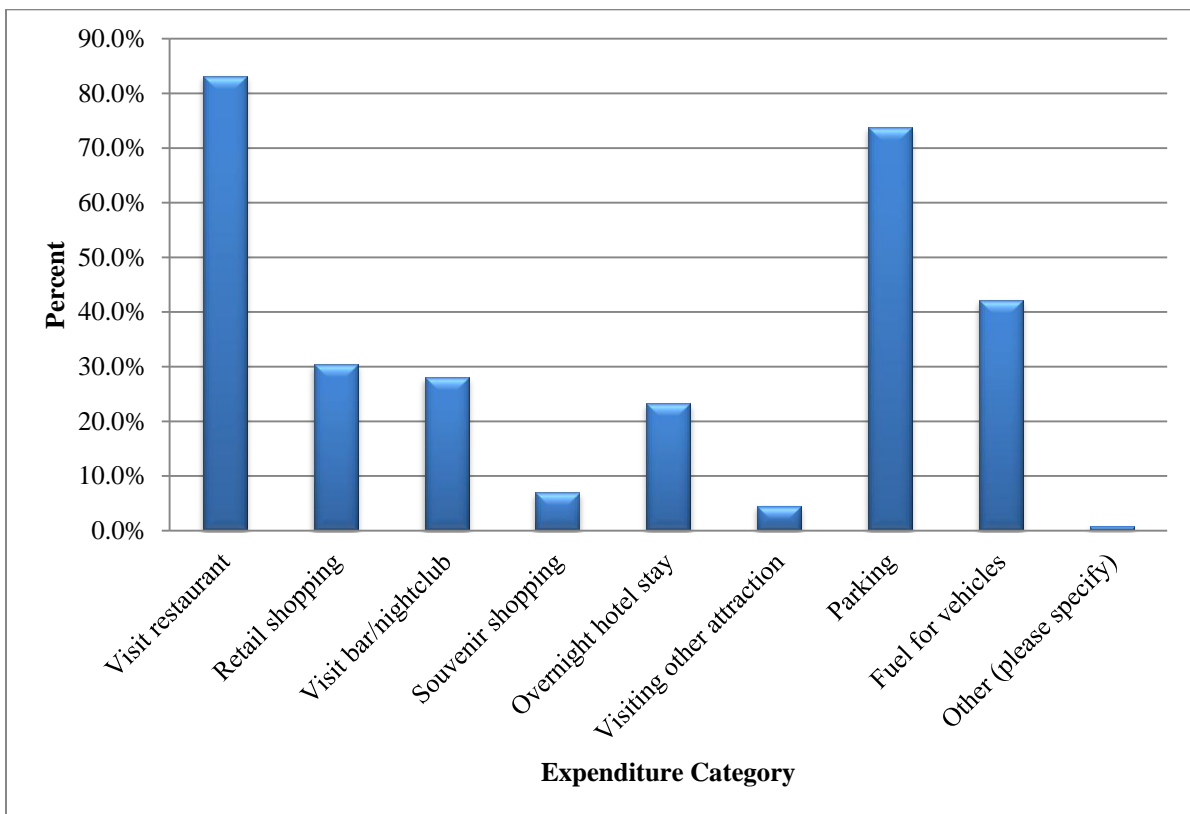
Figure 6 Average In-Arena Respondent Spending during a Typical Arena Event



Spending Outside the Arena

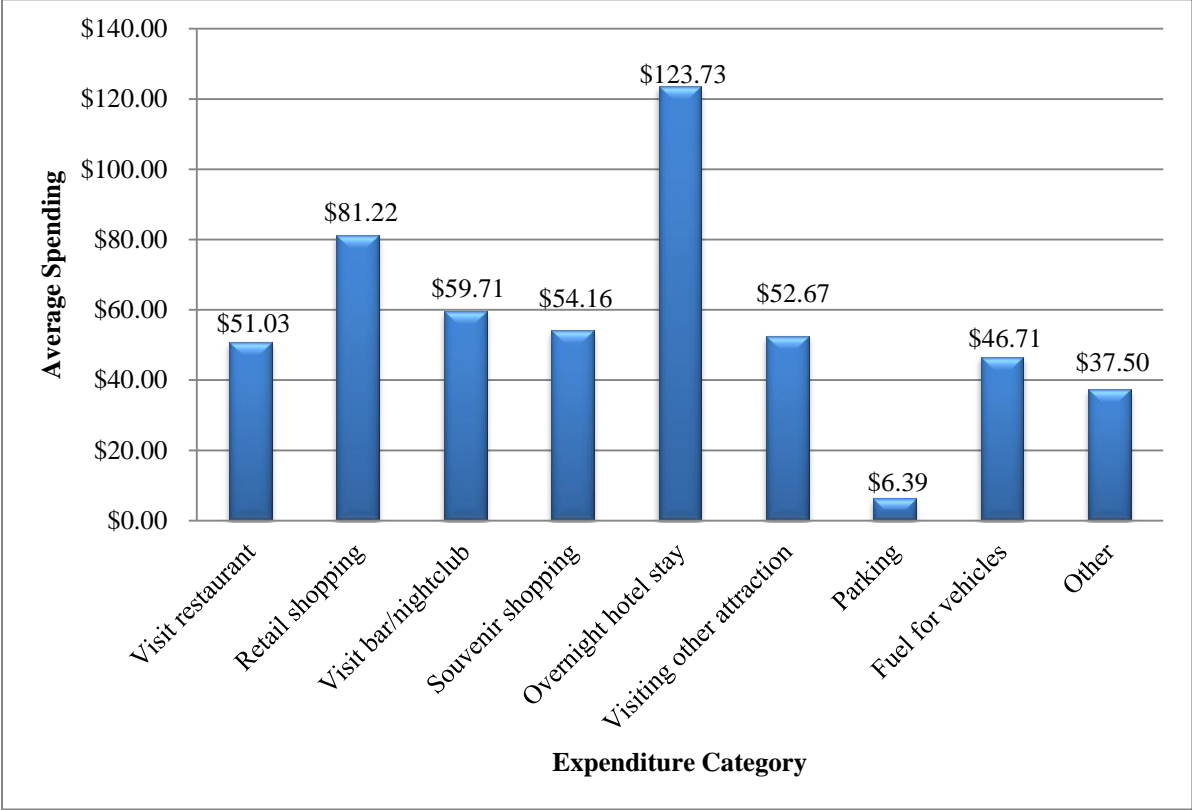
Respondents were asked to identify categories of spending occurring outside the Arena during a typical Arena event. Such spending would have occurred at an external location (such as an area restaurant or local gas station) and is meant to quantify spending occurring in the region as a result of the presence of the Arena. Most respondents identified spending money at an area restaurant and parking (83.2 percent and 73.9 percent, respectively) while attending a typical Arena event. Few respondents reported purchases related to souvenir shopping and visiting other attractions (7 percent and 4.6 percent, respectively) while attending a typical Arena event. Figure 7 provides attendee responses by expenditure category for out-of-Arena purchases at a typical Arena event.

Figure 7 Out-of-Arena Purchases by Respondents during a Typical Arena Event



Based on attendee responses, average spending on an overnight hotel stay was the costliest expenditure category (\$123.73 per respondent¹⁰) followed by retail shopping (\$81.22 per respondent). Average spending on parking (\$6.39 per respondent) was the least costly expenditure category. Average out-of-Arena spending per respondent during a typical Arena event is provided in Figure 8.

Figure 8 Average Out-of-Arena Respondent Spending during a Typical Arena Event

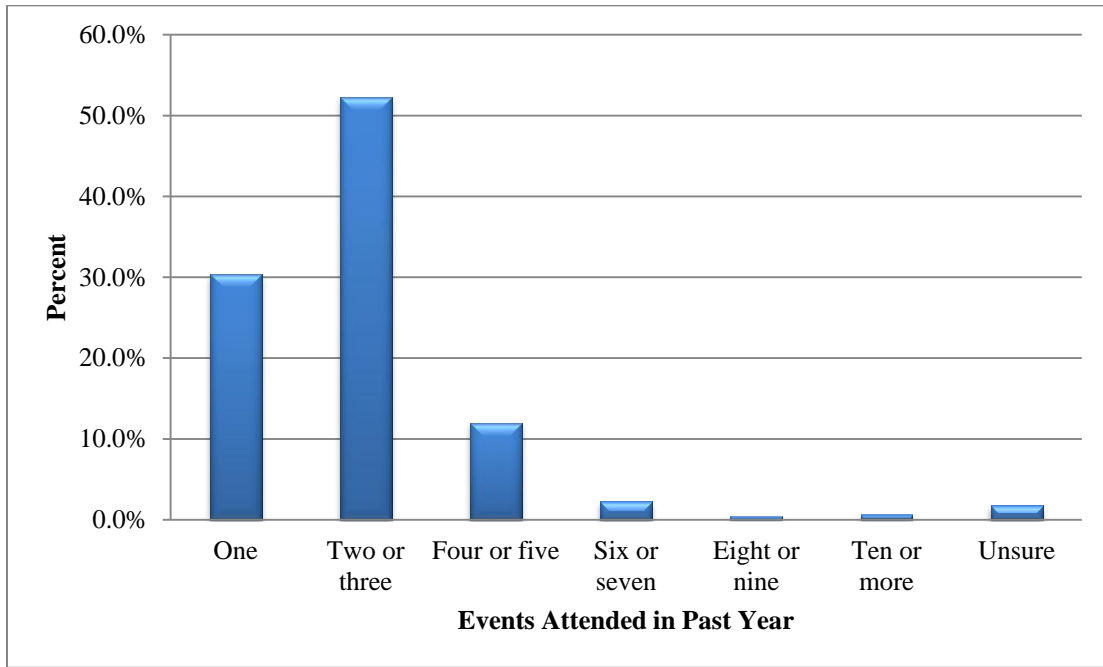


¹⁰ Please note: as with all other survey respondent spending weighted averages, not all respondents reported an overnight hotel stay. This per respondent spending is representative of the proportion who listed this expenditure only.

Respondent Behavior Related to Big Sandy Superstore Arena Events

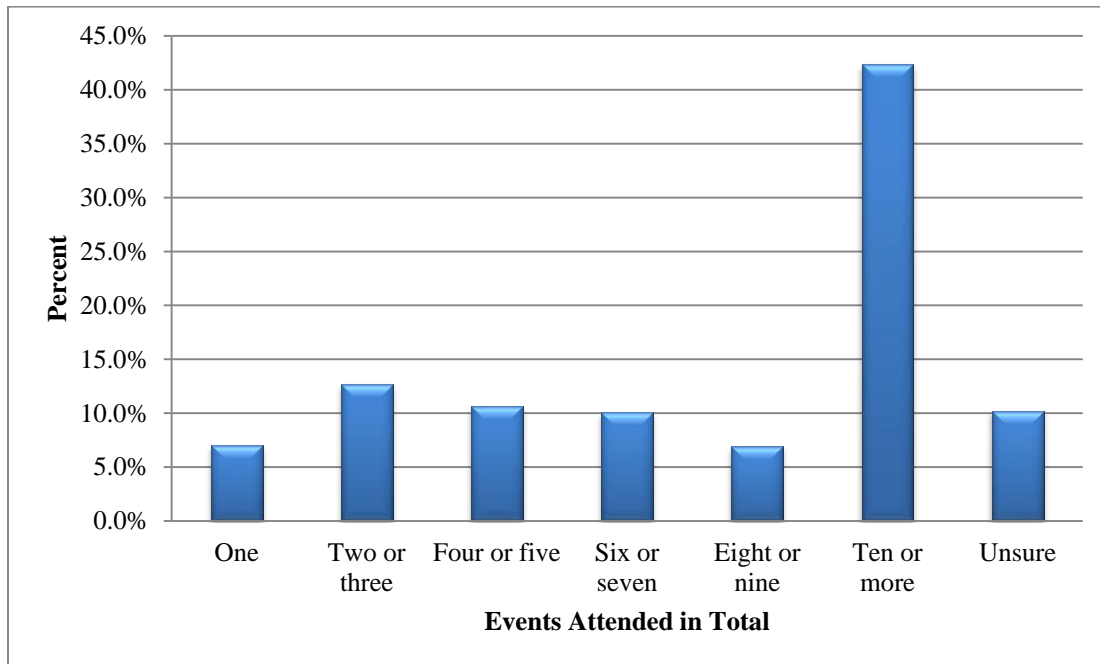
The majority of survey respondents (76.7 percent) have attended a Big Sandy Superstore Arena event within the past year. Of those, just over half (52.3 percent) have attended either two or three events in that timeframe. The number of events attended by survey respondents is provided in Figure 9.

Figure 9 Number of Arena Events Attended by Survey Respondents in the Past Year



When asked how many events at the Big Sandy Superstore Arena had been attended in total, approximately 42 percent of respondents answered they had attended 10 or more. The distribution of the remaining responses was fairly even. The number of events attended in total at the Big Sandy Superstore Arena is illustrated in Figure 10.

Figure 10 Number of Arena Events Attended in Total by Survey Respondents



Survey respondents were asked to identify all sources used for notification of upcoming events at the Big Sandy Superstore Arena. Each respondent was given the opportunity to choose all applicable sources. As a result, attendees may have indicated more than one source.

As is shown in Table 9, e-mail communication is the source most identified to notify attendees of upcoming events (an excess of 61 percent of respondents). Nearly 57 percent of respondents identified the radio as a source for Arena event information. The Arena website was highly used by respondents (over 42 percent). Very few respondents answered that brochures and/or mailings provided a significant source of information of upcoming events at the Arena.

Table 9 Notification of Upcoming Arena Events by Source

Source	Percent	Source	Percent
E-Mail	61.4%	Performer/Artist Website	24.7%
Radio	56.8%	Newspaper	18.2%
Big Sandy Superstore Arena Website	42.2%	Other Website	9.3%
Social Media	34.8%	Mailing	1.7%
Word of Mouth	32.6%	Brochure	0.8%
Television	25.6%	Other	0.0%

Concerts and performances are identified as the most common type of Arena event attended by respondents (nearly 97 percent). Approximately 37.6 percent of respondents reported to having attended a sporting event at the Arena while just over 10 percent have attended a conference center event. Other events attended by survey respondents included the Bridal Expo, craft shows and parties. Table 10 provides the percent of survey respondent attendance at various Arena events.

Table 10 Arena Events Attended by Survey Respondents

Event Type	Percent
Concert and/or Performance	96.5%
Sporting Event	37.6%
Family Show	31.7%
Trade Show	30.4%
Graduations	18.3%
Conference Center Event	10.2%
Other	1.4%

Likelihood of Future Activity

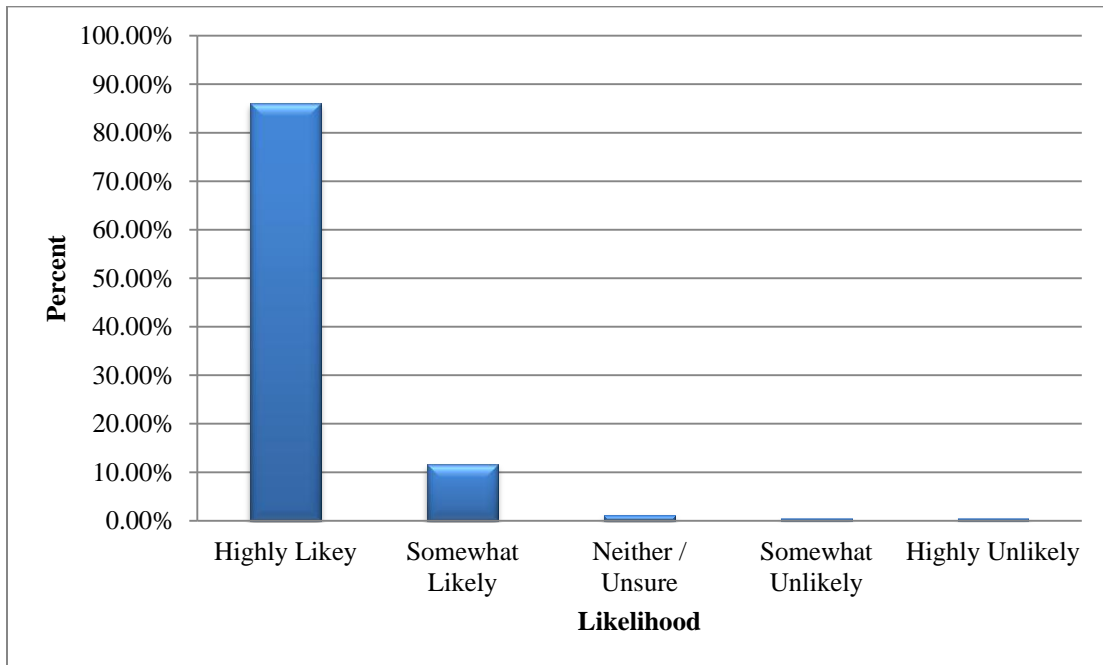
Respondents to the Arena attendee survey were asked to rank five scenarios on the likelihood attending various Arena events and recommending Arena events to others. A five-point Likert scale was used to rank these scenarios. Possible responses for each of these scenarios are:

- Highly Likely
- Somewhat Likely
- Neither Likely nor Unlikely/Unsure
- Somewhat Unlikely
- Highly Unlikely.

This survey question had a 100 percent response rate. Responses were aggregated and are provided in the following figures.

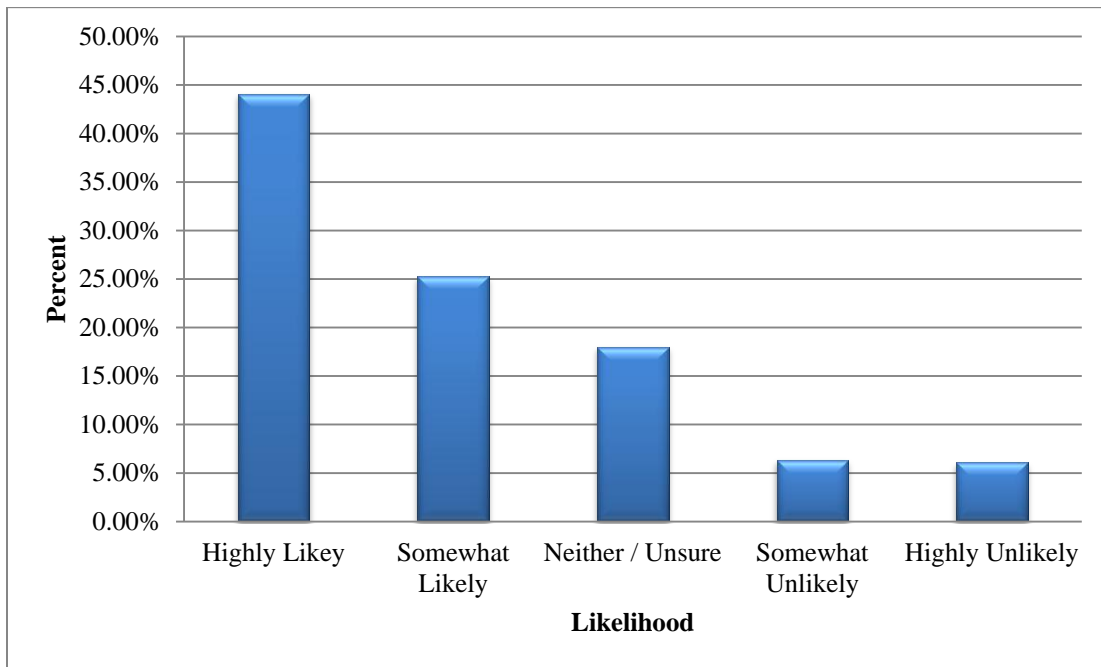
The majority (86.1 percent) of respondents stated they were highly likely to attend concerts and/or performances at the Big Sandy Superstore Arena in the future. Overall, nearly 98 percent stated that they were either “Highly Likely” or “Somewhat Likely” to attend this type of event in the future, while just over 1 percent stated they were either “Highly *Unlikely*” or “Somewhat *Unlikely*” to do so. The responses to this inquiry are illustrated in Figure 11.

Figure 11 Respondent Likelihood of Attending Future Concerts/Performances at the Arena



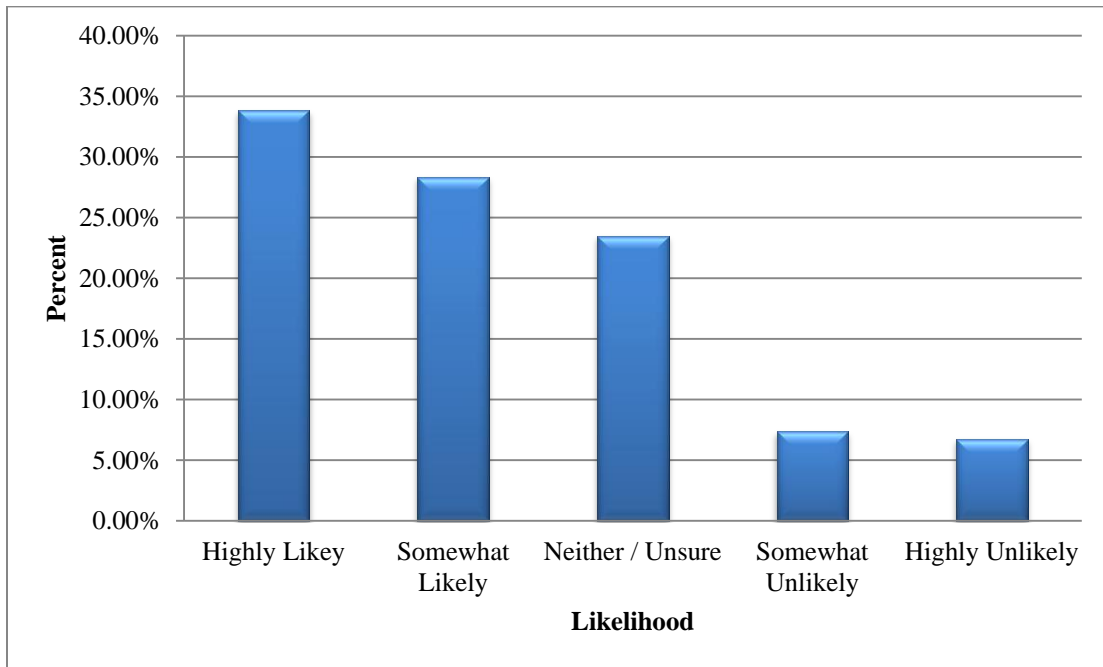
Likelihood of attending family shows at the Arena in the future favored a majority (nearly 70 percent) of respondents stating they were either “Highly Likely” or “Somewhat Likely” to attend this type of event at some point in the future. By comparison, approximately 12.5 percent of respondents were “Highly *Unlikely*” or “Somewhat *Unlikely*” to attend family shows in the future. Just over 18 percent of respondents answered “Neither Likely nor Unlikely/Unsure” to this question. Aggregated responses to this inquiry are provided in Figure 12.

Figure 12 Respondent Likelihood of Attending Future Family Shows at the Arena



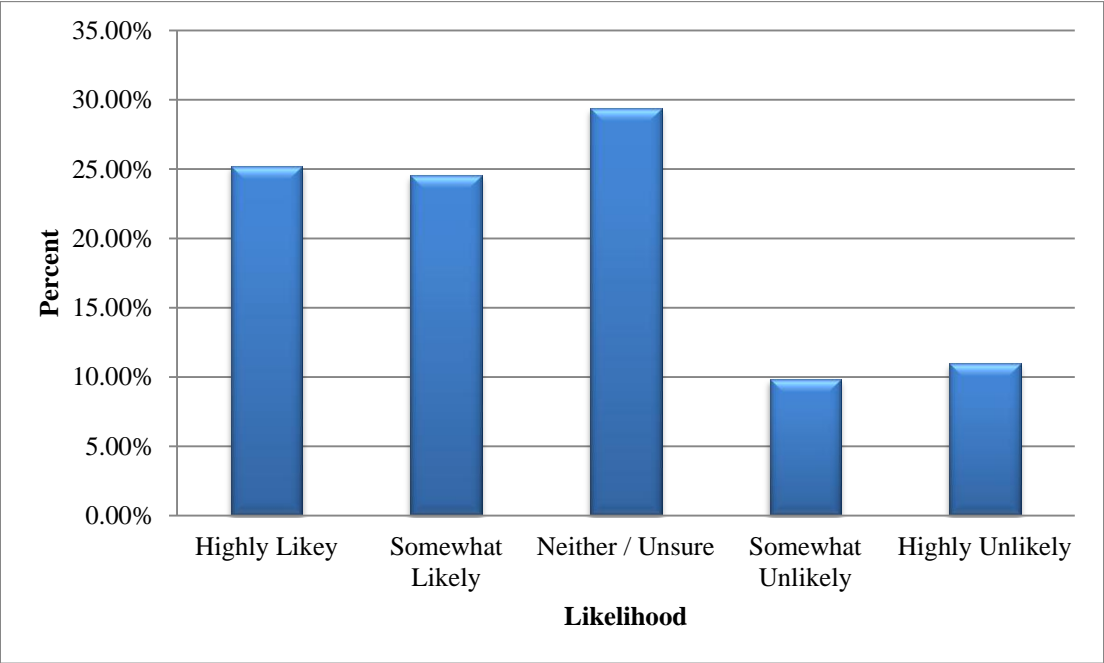
When asked to rank the likelihood of attending a future sporting event at the Arena, 62.3 percent were “Highly Likely” or “Somewhat Likely” to attend while 14.2 percent were “Highly Unlikely” or “Somewhat Unlikely” to attend. Approximately 23.5 percent of respondents answered “Neither Likely nor Unlikely/Unsure” in this response. Figure 13 illustrates the distribution of responses to this question.

Figure 13 Respondent Likelihood of Attending Future Sporting Events at the Arena



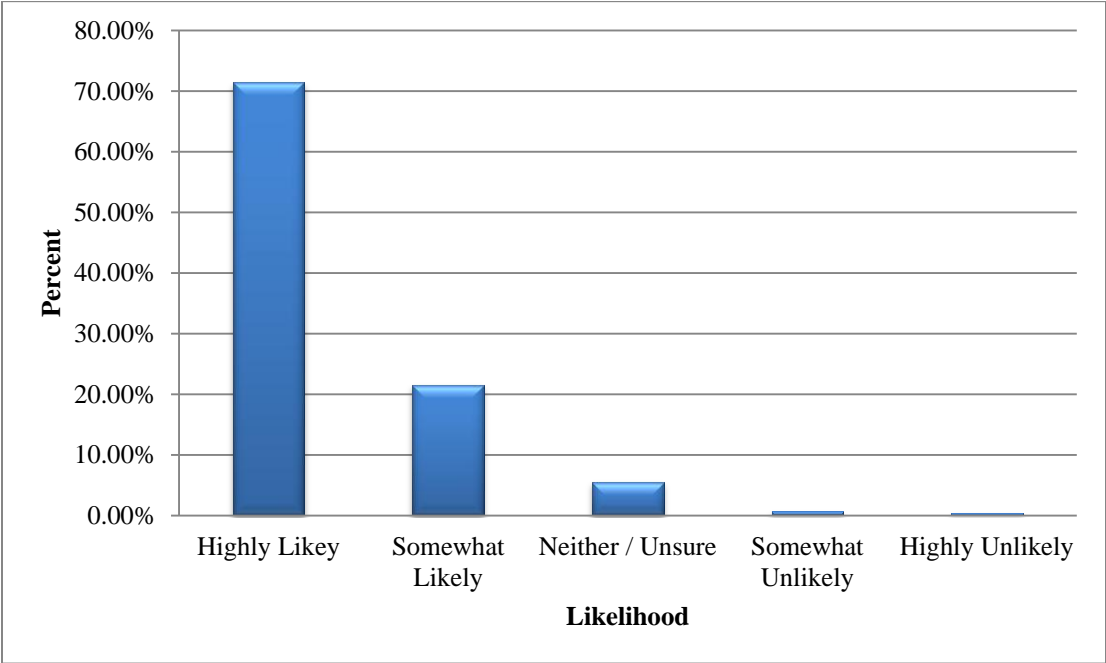
Responses to the likelihood of attending future trade shows at the Arena were more evenly distributed among those “Highly Likely,” “Somewhat Likely,” and “Neither Likely nor Unlikely/Unsure” (25.2, 24.6 and 29.4 percent, respectively) as compared to other events. Roughly half of respondents answered that they were “Highly Likely” or “Somewhat Likely” to attend future trade shows, compared to approximately 21 percent which were “Highly Unlikely” or “Somewhat Unlikely” to attend. Aggregated responses are provided in Figure 14.

Figure 14 Respondent Likelihood of Attending Future Trade Shows at the Arena



Respondents were overwhelmingly favorable when asked to rank the likelihood of recommending future events to others. Approximately 93 percent were “Highly Likely” or “Somewhat Likely” to recommend Arena events to others; of those respondents, more than 71 percent entered “Highly Likely” responses. Only 1.3 percent were “Highly *Unlikely*” or “Somewhat *Unlikely*” to recommend events to others. The likelihood of recommendation is illustrated in Figure 15.

Figure 15 Respondent Likelihood of Recommending Events at the Arena to Others



Survey Respondent Profile

Respondents were asked six questions which did not directly pertain to spending and attendance at the Arena. Responses to these classification questions are aggregated to provide an overview of the survey respondent profile without identifying any individual respondent.

Respondent Location

Nearly 97 percent of respondents supplied their zip code. Of those individuals, the top 10 zip codes provided were, unsurprisingly, from Huntington and surrounding areas. Table 11 provides the 10 most-mentioned zip codes ranked by percent of respondents.

Table 11 Largest Zip Code Representation by Respondents

Zip Code	Area	Percent of Respondents
25705	Huntington, WV	5.0%
25704	Huntington, WV	4.0%
45638	Ironton, OH	3.8%
25701	Huntington, WV	3.2%
25504	Barboursville, WV	2.4%
45631	Gallipolis, OH	2.4%
41101	Ashland, KY	2.2%
45619	Chesapeake, OH	2.2%
45669	Proctorville, OH	2.1%
25177	St. Albans, WV	2.0%

A map of respondent location by county for the eight counties of focus in this study is provided in Appendix F. It is important to note that these totals only count those who provided a zip code on the survey. Aside from Cabell County, where nearly 25 percent of this subset of respondents listed home zip codes, nearly 23 percent provided Kanawha County zip codes and just over 18 percent provided Lawrence County, Ohio, zip codes. The least number of respondents listed Lincoln County zip codes; this group accounted for only 1.6 percent of the eight-county region respondents. Respondent location for the eight-county area of focus for this report is provided in Table 12.

Table 12 Respondent Location in Eight County Area of Focus

County	Percent of Respondents¹¹
Cabell	24.60%
Kanawha	22.80%
Lawrence	18.06%
Wayne	13.09%
Putnam	8.13%
Boyd	7.90%
Mason	3.84%
Lincoln	1.58%

Considering all respondents who supplied their home zip code on the survey, over half (57.7 percent) are from West Virginia. Nearly 98 percent reported zip codes lying in the states of Kentucky, Ohio and West Virginia. The remaining 2.1 percent reported zip codes from Maryland, New York, North Carolina, Pennsylvania, Tennessee and Virginia. The breakdown of respondent location for all attendees who supplied a zip code is provided in Table 13.

Table 13 Respondent Location by State

State	Percent of Respondents¹²
West Virginia	57.70%
Ohio	22.19%
Kentucky	18.02%
Virginia	0.91%
Pennsylvania	0.52%
North Carolina	0.26%
Tennessee	0.13%
Maryland	0.13%
New York	0.13%

The furthest zip code provided in the survey was from southwestern New York with a Euclidean distance¹³ of 320 miles from the Arena. The map in Appendix G shows the 100, 200 and 300 mile radii points from the Arena which is most likely to attract customers.

¹¹ This percentage represents the percent of respondents who provided a zip code from the eight-county area of focus only.

¹² This percentage represents the percent of respondents who provided a zip code within a 500 mile radius of the Arena.

¹³ Euclidean distance refers to the straight-line distance from two location points (Esri 2012). This does not account for street or driving distance from the Arena.

Respondent Demographics

Survey respondents were asked to provide a set of demographic questions (including number of adults and children¹⁴ in the household, age and household income) for classification purposes. Most respondents supplied the number of adults and children living in their household and indicated a range for their age, but nearly 13 percent opted not to answer the household income question.

As for the number of individuals living in the household, the majority of respondents (77.7 percent) indicated that two or three adults live in the household *including* the respondent. Very few respondents reported there being more than five adults living in the household. Nearly half (48.5 percent) of respondents answered that no children currently live in the household and approximately 47.3 percent indicated that one, two or three children live in the household currently. Responses to these questions are provided in Table 14.

Table 14 Adults and Children Living in Respondent Households

Number	Adults in Household	Children in Household
None	N/A	48.5%
One	13.7%	21.5%
Two or three	77.7%	25.8%
Four or five	6.1%	1.8%
Six or seven	0.3%	0.5%
Eight or nine	0.0%	0.0%
10 or more	0.3%	0.1%
Prefer not to answer	1.9%	1.8%

Individuals aged 25 to 34 years of age comprised the largest age group of respondents to the Arena attendee survey (31.2 percent). Nearly 29 percent of individuals indicated their age in the 35 to 44 years of age range. Few (less than 1 percent) indicated an age of 65 years and older. Responses to this survey question are provided in Table 15.

Table 15 Respondent Age

Age Range	Percent of Respondents
18 to 24	12.7%
25 to 34	31.2%
35 to 44	28.9%
45 to 54	17.8%
55 to 64	6.9%
65 and over	0.9%
Prefer not to answer	1.7%

¹⁴ Adults are defined as individuals aged 18 years or older. Children are defined as individuals aged 17 years or younger.

Of the 87.2 percent of respondents who provided a household income range, the majority (48.5 percent) indicated a household income between \$25,000 and \$74,999. Just over 8 percent indicated a household income of less than \$25,000 and just over 1 percent indicated a household income of \$200,000 or more. Table 16 provides respondent household income ranges for this survey.

Table 16 Respondent Household Income

Income Range	Percent of Respondents
Under \$25,000	8.3%
\$25,000 to \$49,999	25.3%
\$50,000 to \$74,999	23.1%
\$75,000 to \$99,999	18.3%
\$100,000 to \$199,999	11.0%
\$200,000 or more	1.2%
Prefer not to answer	12.8%

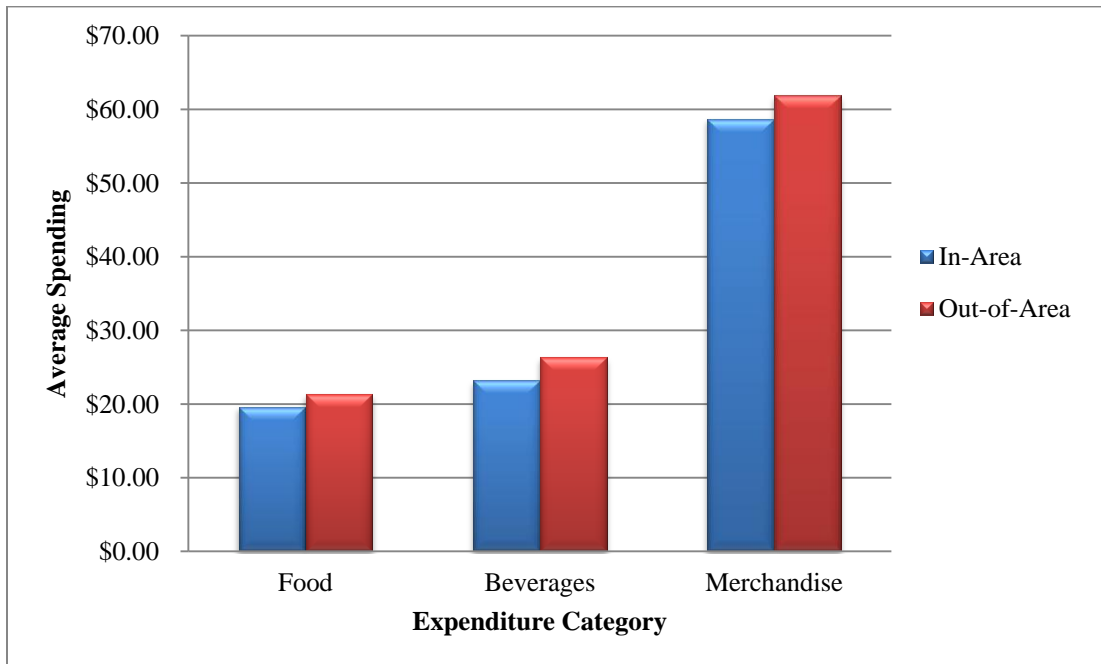
Spending Patterns by Respondent Location

Of the nearly 97 percent of respondents who provided a five digit zip code, approximately 59.8 percent live in the eight-county study area. Provided zip codes are divided into two groups—one for in-area respondents and one for out-of-area respondents—to better analyze the spending patterns of each group. As with total respondents, spending patterns are distinguished between those purchases made while inside the Arena and those made while outside the Arena during a typical Arena event.

In-Arena Spending by Respondent Location

There was very little variation in the spending habits of attendees while inside the Arena during a typical event. As is illustrated in Figure 16, individuals from within the eight-county study area spent on average \$2.65 less than those from outside the study area in each expenditure category. Consistent with in-Arena spending patterns of all respondents (see Figure 5), the merchandise expenditure category is the largest.

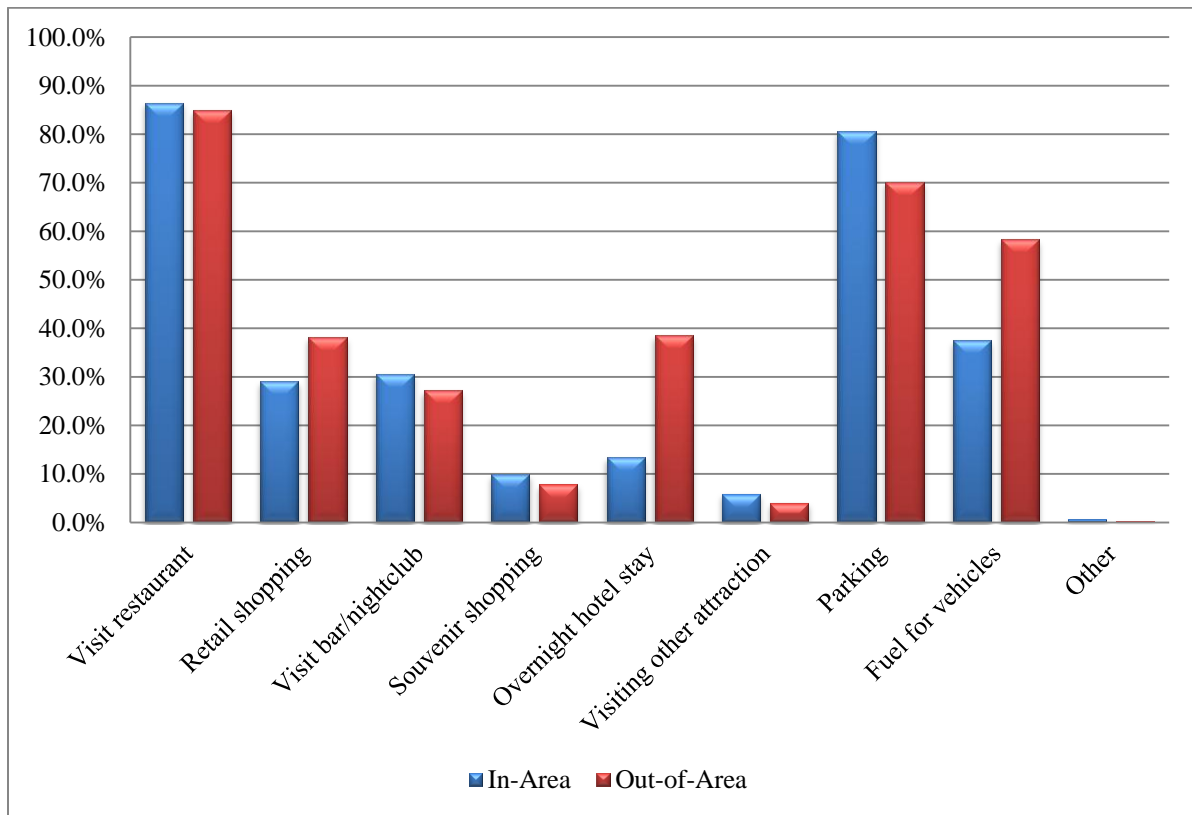
Figure 16 In-Arena Spending for In-Area and Out-of-Area Respondents



Out-of-Arena Spending by Respondent Location

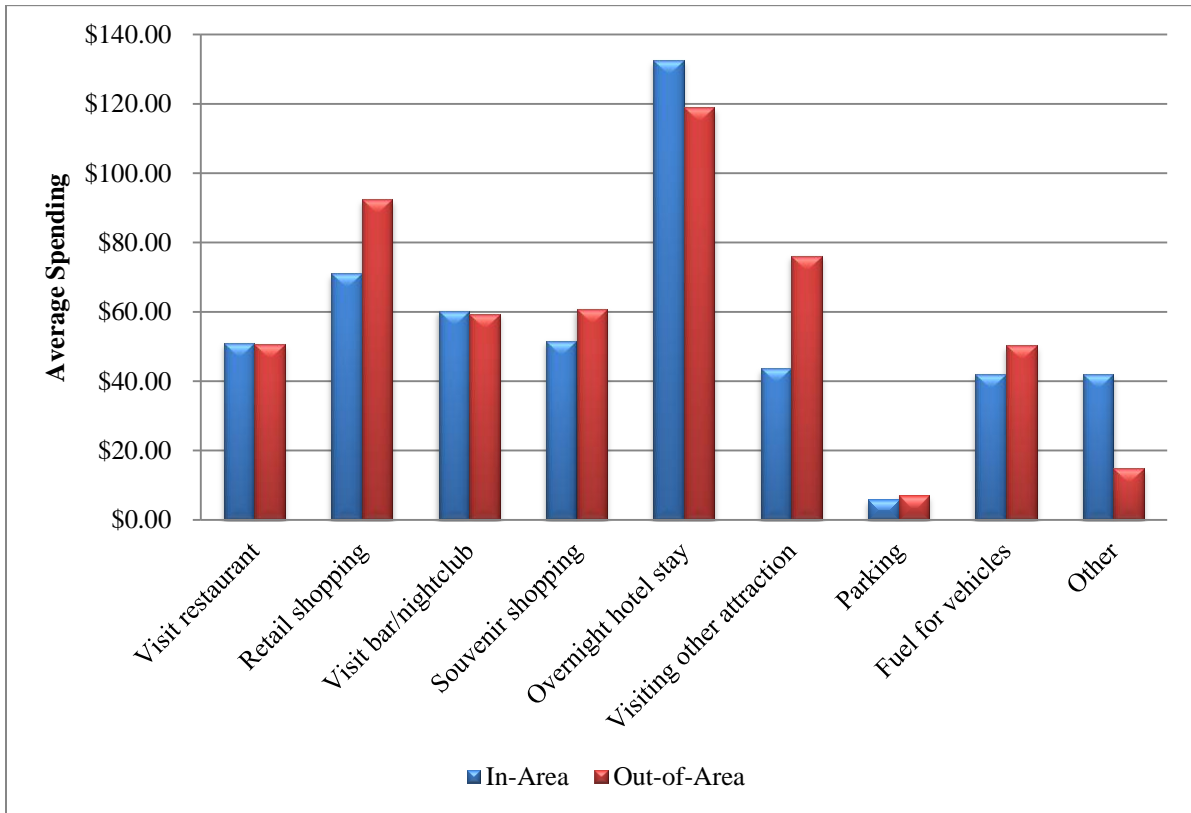
Unsurprisingly, more out-of-area survey respondents noted an overnight hotel stay while attending an Arena event (38.6 percent compared to 13.5 percent for in-area respondents). In-area respondents are reportedly slightly more likely to pay for parking while attending an Arena event (80.6 percent compared to 70.2 percent for out-of-area respondents). This could be a result of out-of-area respondents parking at a hotel and commuting on foot or via public transportation to the Arena. The percentage of in-area and out-of-area survey respondents participating in other activities while attending a typical Arena event is provided in Figure 17.

Figure 17 Out-of-Arena Purchases Made by In-Area and Out-of-Area Respondents



While attending a typical Arena event, in-area and out-of-area respondents spend about the same amount on average on purchases made at area restaurants and bars/nightclubs (see Figure 18). Spending on other attractions in the area exhibited the largest difference on average (out-of-area respondents spend on average \$32.44 more on this type of activity) and out-of-area respondents reported spending about \$21 more on average on retail shopping compared to in-area respondents.

Figure 18 Out-of-Arena Spending for In-Area and Out-of-Area Respondents



Intangible Benefits

In addition to the several revenue-generating events held at the Big Sandy Superstore Arena during each year for which rent and other income is paid for use of the facilities, the Arena hosts a variety of non-ticketed events for which very little direct revenue is produced. These events provide a societal impact on the City of Huntington and the surrounding area which is difficult to quantify but is still an important aspect of the effect the Arena produces. A few of these events include:

- Marshall University Commencement
- Graduation ceremonies for Spring Valley, Cabell Midland, Huntington and Lincoln County High Schools
- Huntington Dog Show
- Spikefest Volleyball Tournament
- Pearl Harbor Remembrance events
- Marshall University International Food Show.

Without an establishment such as the Arena to provide these events at little-to-no cost to guests, the organizations hosting these events would be forced to find alternate accommodations, perhaps at significant cost(s). The relocation of such events would most likely detract from the valuable revenue realized in downtown Huntington when attendees dine at local restaurants, watch a film at the movie theater and partake in other activities.

Quantifying these benefits is beyond the scope of this report and would be difficult to ascertain. Yet it is not difficult to understand that the potential loss from hosting these events elsewhere could be detrimental to the local economy without in-kind contribution of the Big Sandy Superstore Arena.

Summary

It is evident from the results of this study that the presence of the Big Sandy Superstore Arena makes a profound, positive impact on both the City of Huntington and the surrounding region. Not only does the Arena benefit the local economy by generating an estimated \$17 million in total output annually and sustaining nearly 200 jobs¹⁵ in the region, the Arena provides societal benefits to the area through hosting several non-ticketed events each year. Although quantifying these benefits is beyond the scope of this report, the potential financial complications resulting from hosting these events elsewhere could be damaging to the local economy.

Were the day-to-day operations of this facility to cease, thousands of individuals would be forced to find an alternate facility—potentially out of the region—to attend performances and other

... I love the Big Sandy Superstore Arena! I have had a lot of fun times there, and more to come.

*—2012 Attendee
Survey Respondent*

¹⁵ Note: this estimate represents the approximate number of jobs sustained from one year to the next, not the creation of new jobs each year.

such events elsewhere. As a consequence, several million dollars typically spent in this area every year would be lost. As many survey respondents were willing to attest in their comments—a collection of which were reflected throughout this report—the Big Sandy Superstore Arena has provided a plethora of popular entertainment to attendees over the years and is very likely to continue to do so into the future.

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Appendix A Location of the Big Sandy Superstore Arena

Big Sandy Superstore Arena Accessibility



Appendix B Big Sandy Superstore Arena Conference Center Layout



Room	Dimension	Sq Footage	Height	Lecture	Banquet	Banquet w/ Dancefloor	Classroom	Undraped 9' Booths	10x10 Draped Booths
Riverfront Ballroom	92'x92'6"	8,500	14', 12'	800	600	500	450	72	40
Azalea Room	54'x92'6"	5,000	14'	350	250	220	225	43	24
Dogwood Room	38'x39'	1,500	12'	80	50	n/a	60	16	9
Rhododendron Room	38'x53'	2,000	12'	130	120	100	96	21	12
Dogwood & Rhododendron	38'x92'	3,500	12'	200	170	140	156	37	21
Riverside Suite	44'x96'	4,224	12'	350	300	200	200	36	20
1/3 of Riverside Suite	44'x32'	1,408	12'	80	60	n/a	60	12	7
2/3 of Riverside Suite	44'x64'	2,816	12'	200	120	60	120	25	14
Meeting Rooms	22'x28'	560	9'	35	30	n/a	20	n/a	n/a

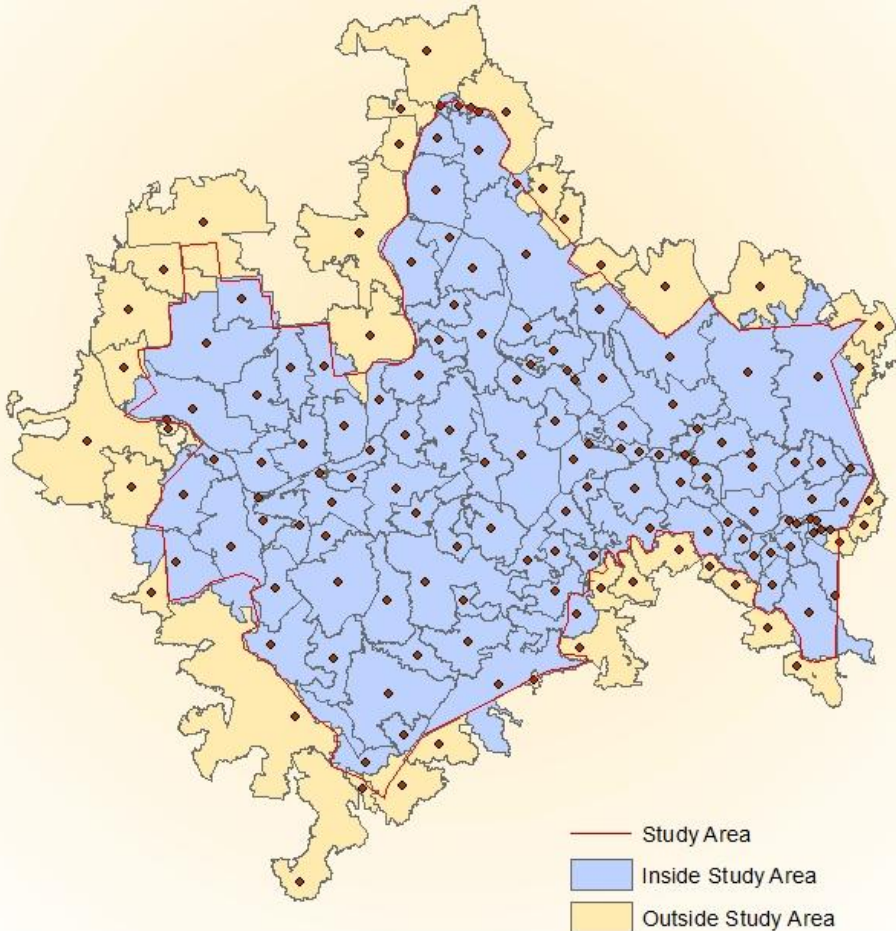


One Civic Center Plaza
 Huntington, WV 25701
www.bigsandyarena.com

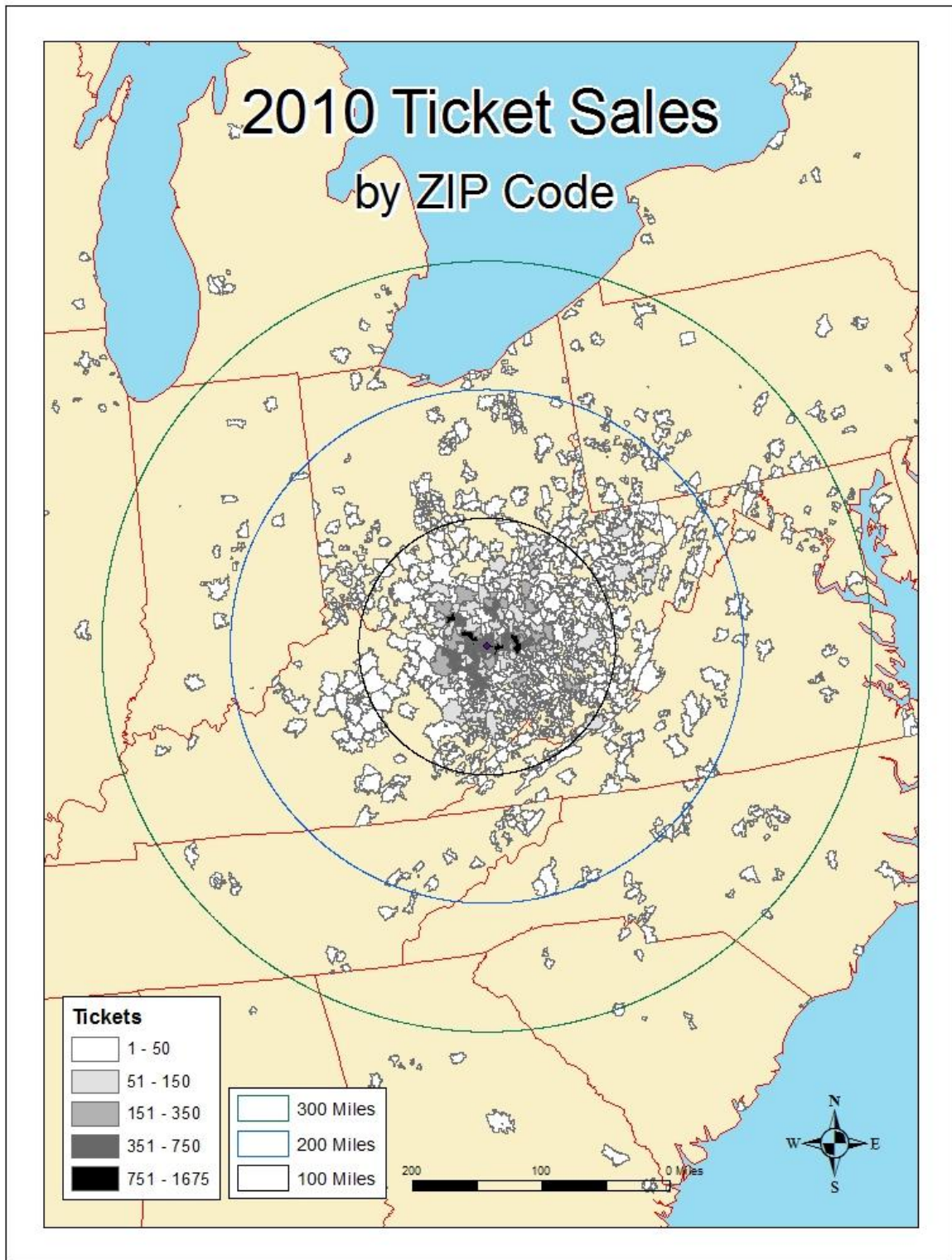
Booking Information: Linda Fouch
lfouch@bigsandyarena.com | 304-696-5563
 Booking Information: Bridget Donahoe
donahoe@bigsandyarena.com | 304-696-4406

Appendix C Study Area Zip Code Determination Using Centroids

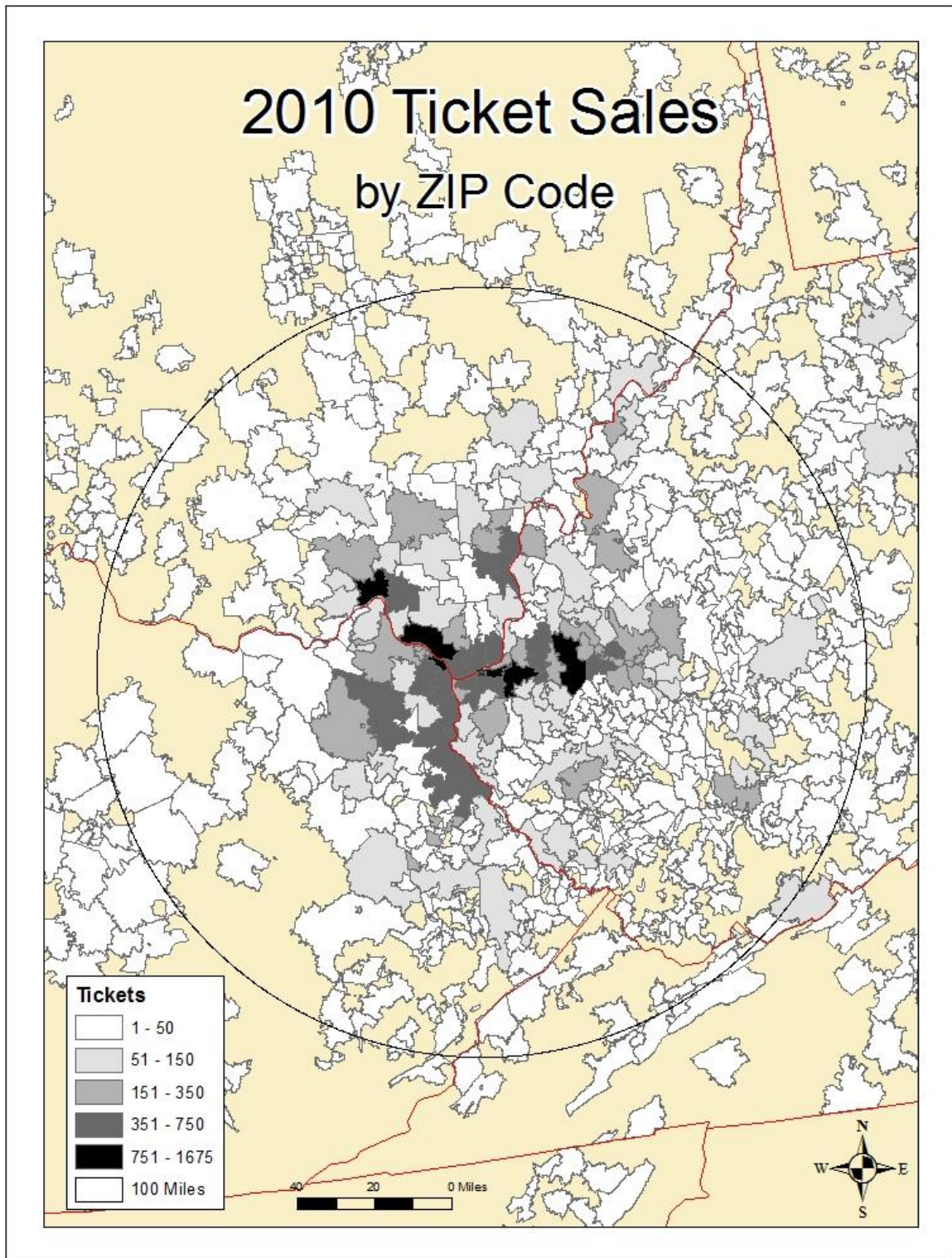
Study Area ZIP Code Determination Using Centroids



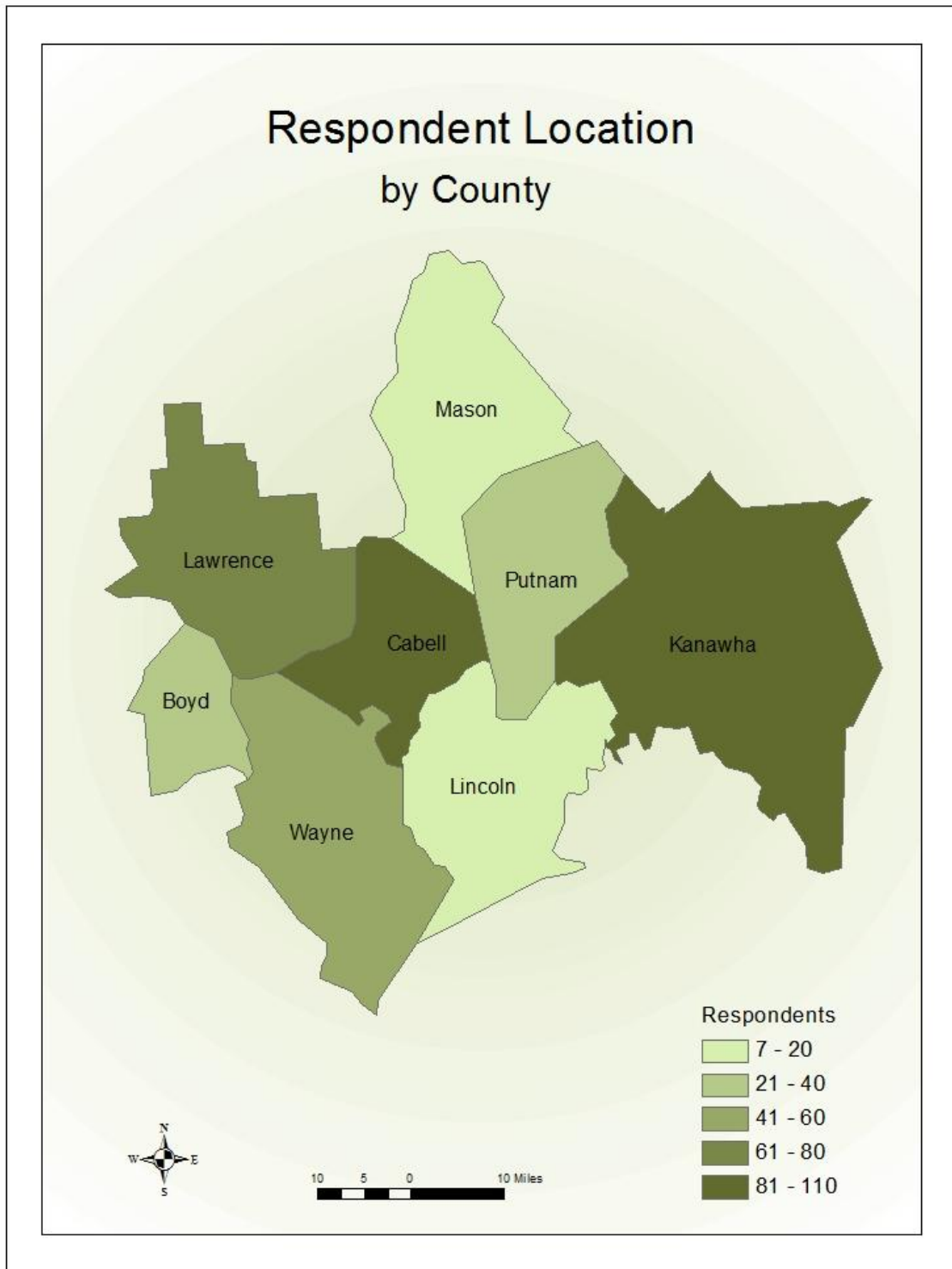
Appendix D 2010 Ticket Sales by Zip Code—300 Mile Radius



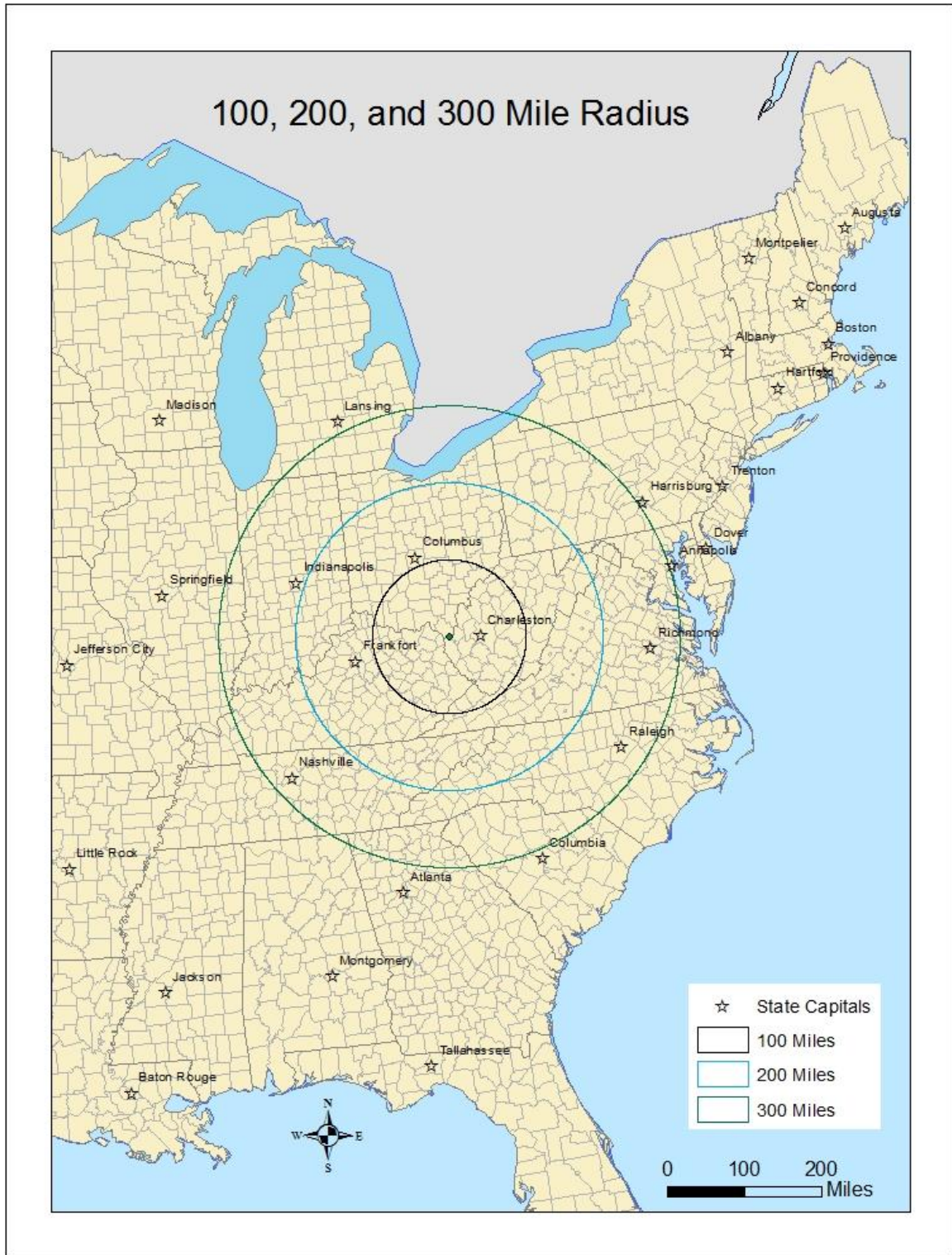
Appendix E 2010 Ticket Sales by Zip Code—100 Mile Radius



Appendix F Survey Respondent Location by County



Appendix G 100, 200 and 300 Mile Radius from the Big Sandy Superstore Arena



Appendix H Big Sandy Superstore Arena Attendee Survey

Our interviews must be with an adult 18 or over. Are you at least 18 years of age? YES NO

1. Have you attended a Big Sandy Superstore Arena event within the past year? YES NO
IF NO, skip to Q3. IF YES, continue to Q2.

2. Approximately how many events at the Big Sandy Superstore Arena have you attended **within the past year?**

- | | | |
|---------------------------------------|--|---------------------------------------|
| <input type="checkbox"/> One | <input type="checkbox"/> Two or three | <input type="checkbox"/> Four or five |
| <input type="checkbox"/> Six or seven | <input type="checkbox"/> Eight or nine | <input type="checkbox"/> 10 or more |
| <input type="checkbox"/> Unsure | | |

3. Approximately how many events at the Big Sandy Superstore Arena have you attended **in total?**

- | | | |
|---------------------------------------|--|---------------------------------------|
| <input type="checkbox"/> One | <input type="checkbox"/> Two or three | <input type="checkbox"/> Four or five |
| <input type="checkbox"/> Six or seven | <input type="checkbox"/> Eight or nine | <input type="checkbox"/> 10 or more |
| <input type="checkbox"/> Unsure | | |

4. How do you usually hear about upcoming Big Sandy Superstore Arena events? Choose all that apply.

- | | | |
|---|---|--|
| <input type="checkbox"/> Big Sandy Superstore Arena Website | <input type="checkbox"/> Performer/Artist Website | <input type="checkbox"/> Other Website |
| <input type="checkbox"/> Newspaper | <input type="checkbox"/> Brochure | <input type="checkbox"/> E-Mail |
| <input type="checkbox"/> Television | <input type="checkbox"/> Radio | <input type="checkbox"/> Mailing |
| <input type="checkbox"/> Social Media | <input type="checkbox"/> Word of Mouth | <input type="checkbox"/> Other _____ |

5. What type of event(s) have you attended at the Big Sandy Superstore Arena? Choose all that apply.

- | | | |
|--|--------------------------------------|---|
| <input type="checkbox"/> Concert/performance | <input type="checkbox"/> Family show | <input type="checkbox"/> Sporting event |
| <input type="checkbox"/> Trade show | <input type="checkbox"/> Graduations | <input type="checkbox"/> Conference center events |
| <input type="checkbox"/> Other _____ | | |

6. Thinking about your typical visit to the Big Sandy Superstore Arena for an event, what purchases did you make **while inside** the Arena? Approximately how much money did you spend during that activity?

- | Purchase | Expenditure | Purchase | Expenditure |
|--|-------------|--------------------------------------|-------------|
| <input type="checkbox"/> Food/beverage | \$ _____ | <input type="checkbox"/> Merchandise | \$ _____ |
| <input type="checkbox"/> Other _____ | \$ _____ | | |

7. Thinking about your typical visit to the Big Sandy Superstore Arena for an event, what other activities did you participate in **while outside** the Arena? Approximately how much money did you spend during that activity?

- | Activity | Expenditure | Activity | Expenditure |
|---|-------------|--|-------------|
| <input type="checkbox"/> Visit restaurant | \$ _____ | <input type="checkbox"/> Retail shopping | \$ _____ |
| <input type="checkbox"/> Visit bar/nightclub | \$ _____ | <input type="checkbox"/> Souvenir shopping | \$ _____ |
| <input type="checkbox"/> Overnight hotel stay | \$ _____ | <input type="checkbox"/> Visiting other attraction | \$ _____ |
| <input type="checkbox"/> Parking | \$ _____ | <input type="checkbox"/> Fuel for vehicles | \$ _____ |
| <input type="checkbox"/> Other _____ | \$ _____ | | |

8. Thinking about your typical visit to the Big Sandy Superstore Arena, how many people **in addition to yourself** generally accompany you?

- | | | |
|---|---------------------------------------|--|
| <input type="checkbox"/> None/just myself | <input type="checkbox"/> One | <input type="checkbox"/> Two or three |
| <input type="checkbox"/> Four or five | <input type="checkbox"/> Six or seven | <input type="checkbox"/> Eight or nine |
| <input type="checkbox"/> 10 or more | <input type="checkbox"/> Unsure | |

9. Approximately how many miles did you travel to attend an event at the Big Sandy Superstore Arena?

- | | | |
|---------------------------------------|--|-------------------------------------|
| <input type="checkbox"/> Less than 25 | <input type="checkbox"/> 25 to 100 | <input type="checkbox"/> 101 to 200 |
| <input type="checkbox"/> 201 to 300 | <input type="checkbox"/> 301 to 400 | <input type="checkbox"/> 401 to 500 |
| <input type="checkbox"/> 501 to 1,000 | <input type="checkbox"/> 1,001 miles or more | <input type="checkbox"/> Unsure |

The remaining questions are for classification purposes only.

10. Including yourself, how many persons 18 years of age and older live in your household?

- | | | |
|---------------------------------------|---|---------------------------------------|
| <input type="checkbox"/> Just myself | <input type="checkbox"/> Two or three | <input type="checkbox"/> Four or five |
| <input type="checkbox"/> Six or seven | <input type="checkbox"/> Eight or nine | <input type="checkbox"/> 10 or more |
| <input type="checkbox"/> Unsure | <input type="checkbox"/> Prefer not to answer | |

11. How many children 17 years of age or younger live in your household?

- | | | |
|---------------------------------------|---|---------------------------------------|
| <input type="checkbox"/> One | <input type="checkbox"/> Two or three | <input type="checkbox"/> Four or five |
| <input type="checkbox"/> Six or seven | <input type="checkbox"/> Eight or nine | <input type="checkbox"/> 10 or more |
| <input type="checkbox"/> Unsure | <input type="checkbox"/> Prefer not to answer | |

12. Please indicate into which of the following broad age groups you fall.

- | | | |
|---|-----------------------------------|--------------------------------------|
| <input type="checkbox"/> 18 to 24 | <input type="checkbox"/> 25 to 34 | <input type="checkbox"/> 35 to 44 |
| <input type="checkbox"/> 45 to 54 | <input type="checkbox"/> 55 to 64 | <input type="checkbox"/> 65 and over |
| <input type="checkbox"/> Prefer not to answer | | |

13. In which of the following ranges does your household income fall?

- | | | |
|---|---|---|
| <input type="checkbox"/> Under \$25,000 | <input type="checkbox"/> \$25,000 to \$49,999 | <input type="checkbox"/> \$50,000 to \$74,999 |
| <input type="checkbox"/> \$75,000 to \$99,999 | <input type="checkbox"/> \$100,000 to \$199,999 | <input type="checkbox"/> \$200,000 or more |
| <input type="checkbox"/> Prefer not to answer | | |

14. Please provide your five digit zip code. _____ (zip code)

15. Please rate the following statements on a scale of “Highly Likely” to “Highly Unlikely”.

	Highly Likely	Somewhat Likely	Neither Likely or Unlikely/Unsure	Somewhat Unlikely	Highly Unlikely
I will attend concerts/performances at the Big Sandy Superstore Arena in the future.	5	4	3	2	1
I will attend family shows at the Big Sandy Superstore Arena in the future.	5	4	3	2	1
I will attend sporting events at the Big Sandy Superstore Arena in the future.	5	4	3	2	1
I will attend trade shows at the Big Sandy Superstore Arena in the future.	5	4	3	2	1
I will recommend events at the Big Sandy Superstore Arena to others.	5	4	3	2	1

16. What comments, if any, do you have regarding your experiences with the Big Sandy Superstore Arena?

Thank you very much for your participation! We appreciate your assistance in helping us better understand the relationship between the Big Sandy Superstore Arena and its patrons. Should you have any questions regarding this survey please contact Kent Sowards at sowards10@marshall.edu.