



Chautauqua Institution Economic Contribution Analysis



Spring 2023



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EXECUTIVE SUMMARY

As Chautauqua Institution approaches its sesquicentennial and as the Chautauqua Property Owners Association approaches its 60th anniversary – both in 2024 – it is a fitting time to take stock of the assets, inspirations and contributions that may be attributed to the existence and sustained mission of this storied center for learning, discovery, exploration and community. Situated on the shores of Chautauqua Lake, Chautauqua was founded as a place where people might make purposeful use of leisure time. That vision, sustained by generations of individuals and groups, remains the centerpiece of Chautauqua’s mission, even while the organization and the community that surrounds it have grown and shifted in size, scope, lived experience and perspective.

The Chautauqua Institution grounds and community are unique. The Institution is a not-for-profit organization situated amid private properties owned and cared for by individuals, families and, in some cases, private businesses. Some owners reside in their homes or operate their businesses on the grounds year-round; others are part-time or seasonal. Some owners offer their properties for rent, serving as hosts to thousands of visitors to the region each year. This study aims to capture and characterize the impact of both the Institution’s operations and property owner investments and contributions on Chautauqua County and the wider region served by the mission and existence of Chautauqua Institution.

As will be documented in the body of this study, the annual economic contributions of Chautauqua Institution, its more than 100,000 patrons and 1,175 property owners are significant to the viability of Chautauqua County and the greater region of western New York and central to the tourism economy of these two regions. In Chautauqua County alone, \$233 million in total economic impact is generated, 3,208 jobs are supported and sustained, and \$28.8 million is contributed to the state and local tax base. Chautauqua Property Owners pay \$10.4 million in property and school taxes to the Chautauqua tax base, representing 15% of all real property taxes paid in the county, despite the fact that they only represent 2% of all taxable properties in the county. Their annual spending, philanthropy and volunteerism multiply that impact considerably.

It is important to note that, given Chautauqua’s proximity to the northwestern Pennsylvania border, the impact of the Institution’s operations are likely to play a role in the economies of the border communities, including the City of Erie, Pennsylvania, from which Chautauqua draws many patrons every year. Given the nature and

scope of this study, however, we are unable to specifically characterize the impact of Chautauqua Institution on these communities, even though we consider northwestern Pennsylvania an important part of Chautauqua’s immediate service region. The service map in Appendix F provides a snapshot of the patron base from this region and beyond.

In the pages that follow, these results will be documented at three levels: Chautauqua County, itself; the larger region of western New York; and at the State level. While these tables and graphs themselves tell an impressive story, the magic of this impact is seen in its repeatability and sustainability. Few entities in our world have stood this test of time – nearly 150 years of impact and counting. The century-and-a-half partnership Chautauqua Institution and Chautauqua property owners achieve enhances the quality of education, livability, and the discoverability of the greater Chautauqua region.

This study is presented in three parts. First, a **top-line summary** is offered in tabular form of the Institution’s and Property Owners’ impacts on Chautauqua County, western New York, and the state of New York. Next, **contextual information** is provided that outlines the study intent, research design, and definitions. This section is followed by **additional data and analysis as well as storytelling** to more fully illuminate the meaning behind the numbers. Finally, the appendices offer **additional resources and information** on the study design, other sources consulted, and demographics of Chautauqua property owners who completed surveys.

CHAUTAUQUA INSTITUTION’S IMPACT SUMMARIZED

Combined Impact on Chautauqua County

- 100,000+ visitors annually during the summer alone
- \$129.3 million total value-added impact
- \$28.8 million total state and local tax impact
- \$233.1 million total economic impact
- 3,208 jobs supported and sustained
- 1,175 property owners pay \$10.4 million in property and school taxes
- \$5.2 million in volunteerism and charitable giving from property owners



Economic Impact of Chautauqua Institution on Chautauqua County				
	Total Economic Impact	Total Value-Added Impact	Total Employment Impact (jobs)	Total Local and State Tax Impact
Operations	\$57,258,262	\$27,849,967	1,572 jobs	\$4,495,460
Patrons	\$139,829,297	\$84,985,261	1,371 jobs	\$12,566,924
Property Owners	\$35,984,783	\$16,438,034	265 jobs	\$11,747,167
Total	\$233,072,342	\$129,273,262	3,208 jobs	\$28,809,551

Source: Parker Philips using data from IMPLAN | Definitions defined in Appendix A

WESTERN NEW YORK

- \$242.5 million total economic impact
- \$134.3 million value-added impact
- 3,300 jobs supported and sustained
- \$29.9 million total state and local tax impact

Economic Impact of Chautauqua Institution on Western New York (Allegany, Cattaraugus, Chautauqua, Erie, and Niagara Counties)				
	Total Economic Impact	Total Value-Added Impact	Total Employment Impact (jobs)	Total Local and State Tax Impact
Operations	\$58,299,396	\$28,055,038	1,589 jobs	\$4,468,940
Patrons	\$146,541,104	\$89,064,553	1,427 jobs	\$13,170,136
Property Owners	\$37,712,053	\$17,227,060	284 jobs	\$12,311,030
Total	\$242,552,552	\$134,346,651	3,300 jobs	\$29,950,106

Source: Parker Philips using data from IMPLAN | Definitions defined in Appendix A

In western New York, the combined economic impact of Chautauqua Institution totals \$242.5 million, value-added impact totals \$134.3 million. Chautauqua Institution’s operations, patrons and property owners support and sustain 3,301 jobs and generate \$29.9 million in state and local tax revenue.

NEW YORK

- \$305.5 million total economic impact
- \$191.3 million total value-added impact
- 3,677 jobs supported and sustained
- \$34.8 million total state and local tax impact

Economic Impact of Chautauqua Institution on New York				
	Total Economic Impact	Total Value-Added Impact	Total Employment Impact (jobs)	Total Local and State Tax Impact
Operations	\$87,095,854	\$46,300,917	1,821 jobs	\$6,197,274
Patrons	\$174,791,146	\$119,416,546	1,558 jobs	\$15,835,090
Property Owners	\$43,660,569	\$25,545,744	298 jobs	\$12,730,168
Total	\$305,547,569	\$191,263,207	3,677 jobs	\$34,762,531

Source: Parker Philips using data from IMPLAN | Definitions defined in Appendix A

In New York, the combined economic impact of Chautauqua Institution totals \$305.5 million, supports and sustains 3,677 jobs and generates \$34.8 million in state and local tax revenue.

Visitors attracted to Chautauqua Institution’s inspiring setting and programming as well as property owners who patronize local suppliers make an impact in the regional economy. The analysis presented in this report is based upon primary data collected from Chautauqua Institution, patrons of Chautauqua Institution and property owners within the grounds of Chautauqua Institution. The economic analysis was conducted using IMPLAN.



ABOUT CHAUTAUQUA INSTITUTION



Chautauqua Institution is a not-for-profit, 750-acre community on Chautauqua Lake in southwestern New York State, where approximately 7,500 persons are in residence on any day during a nine-week season, and a total of more than 100,000 attend scheduled public events during the summer months. Still more people

engage through special events, experiences, and programs offered year-round at Chautauqua. Beyond the grounds, the Institution offers programs online and via domestic and international travel experiences that extend the reach and mission of the Institution with the goal of encouraging engagement in-person at Chautauqua as a result.

Chautauqua is dedicated to the exploration of the best in human values and the enrichment of life through a program that explores the important religious, social and political issues of our times; stimulates provocative, thoughtful involvement of individuals and families in creative response to such issues; and promotes excellence and creativity in the appreciation, performance and teaching of the arts.

ABOUT CHAUTAUQUA PROPERTY OWNERS ASSOCIATION



The CPOA is one of many community organizations at Chautauqua Institution that works to enhance the Chautauqua experience. Founded in 1964 to build a sense of community and enhance the Chautauqua experience for property owners, the CPOA organizes events, facilitates communication, and advocates on issues of concern to members. Through the CPOA's interactive communications platform, members can access information, create and share content, and network with fellow Chautauquans throughout the year.

The CPOA has 15 committees that cover a broad array of interests for members to actively engage. The Institution grounds have been divided into 10 geographical 'areas,' each of which has a resident CPOA Representative acting as liaison with the unique 'neighborhoods' of Chautauqua. Those 10 area representatives make up the CPOA Board together with 9 other directors, meeting regularly throughout the year. The CPOA is an entirely volunteer organization funded by annual membership dues and donations.

During the Summer Assembly, the Board organizes informative programming, including two townhall-style meetings, a pre-season dinner, annual area/neighborhood picnics and porch chats. In addition, the Board oversees the publication of a biannual newsletter, weekly email updates during the season, and a Living in Chautauqua guide, which provides useful information for those residing on the Institution grounds. The CPOA Board works closely with the Chautauqua Institution Administration and Board of Trustees to ensure good communication with the community. The significant role that property owners play at Chautauqua is reflected in these strong relationships, which are fostered through regular engagement and collaborative projects.



INTRODUCTION

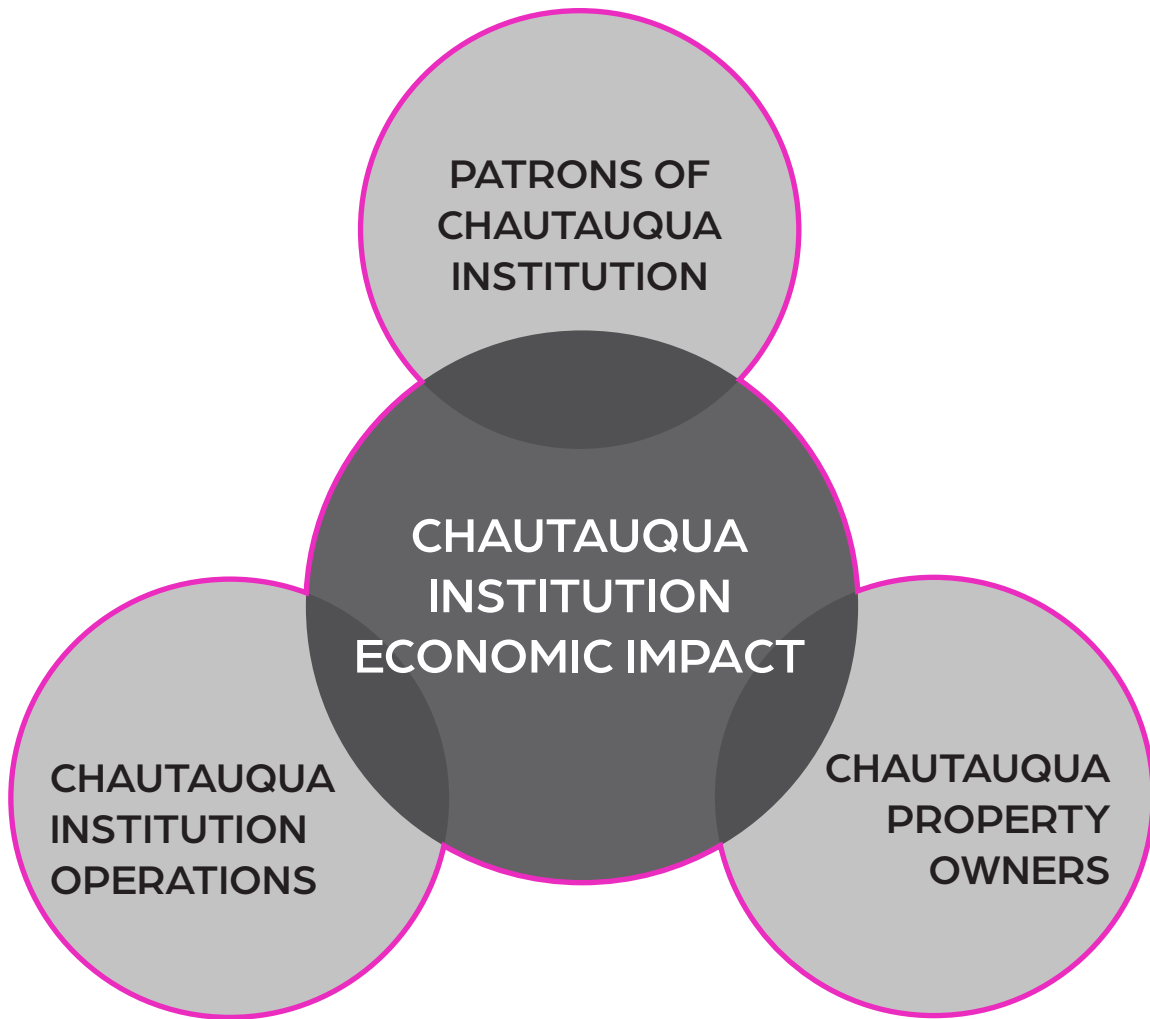
Chautauqua Institution has been cultivating the mind, body and spirit of the community and nation for nearly 150 years. Located in Chautauqua County, this 750-acre lake community in western New York creates a one-of-a-kind opportunity for people to engage with an environment that simultaneously addresses and stimulates their curiosity and speaks to a desire to make a positive difference. The Institution is a draw for visitors year-round with peak visitation happening during the summer, when the Institution draws an estimated 100,000 visitors to the grounds each year. The grounds contain an estimated 1,175 private properties. Chautauqua Institution is an integral part of the community from both economic and societal perspectives. The economic analysis presented in this report quantifies the ways in which Chautauqua Institution, its patrons and property owners provide economic and community contributions to the economy, employment and tax base of Chautauqua County, western New York and New York state.

ABOUT THE STUDY

In April 2022, Chautauqua Institution and Chautauqua Property Owners Association (CPOA) engaged Parker Philips, Inc. to measure the economic contribution of Chautauqua Institution, their patrons and property owners in Chautauqua County, western New York and New York state. The goal of this analysis is to provide an assessment of the total economic, employment, and state and local tax impact of Chautauqua Institution, property owners and patrons. In addition, the study seeks to more broadly show the importance and value of the roles that property owners play within the Institution grounds and in the regional community alike.

To complete the economic impact study of Chautauqua Institution, Parker Philips utilized industry-respected methodologies. The approach for calculating the impact of tourism on Chautauqua County replicates the strategy employed by the National Park Service to build patron profiles of spending. The impact presented in this study is represented in three categories: (1) Patrons; (2) Chautauqua Institution operations; and (3) Chautauqua Property Owners. Data were collected, analyzed and aggregated to show the combined impact of Chautauqua Institution on Chautauqua County, western New York¹, and New York state.

¹ Western New York is defined as: Allegany, Cattaraugus, Chautauqua, Erie and Niagara Counties.



The primary tool used in the performance of this study is the I-O model and dataset developed by IMPLAN Group LLC. Primary financial data used in this study were obtained from Chautauqua Institution and included the following data points: philanthropic contributions, operational expenditures, number of employees, pay and benefits, and visitor numbers for 2019². Primary data collected from 401 patron surveys were used to calculate spending by patrons (local day, non-local day, and overnight). Data collected from 248 property owners were gathered for use in the analysis. Surveys were collected throughout the Chautauqua Institution and online. Additional information on the methodology and assumptions used to complete this study can be found in Appendix B.

Patrons of Chautauqua Institution contribute to sales, profits, jobs, tax revenues and income throughout Chautauqua County and western New York. The most direct effects occur within the primary tourism sectors such as lodging, restaurants, transportation, amusements and retail. Through secondary effects, tourism affects many sectors of the economy. This economic impact analysis of tourism activity focuses on changes in sales, income and employment in a region resulting from patrons of Chautauqua Institution.

² Visitor data from the 2019 season at Chautauqua Institution is utilized because it is considered by leadership of Chautauqua Institution to be the most representative of a regular season since the onset of the COVID-19 pandemic.



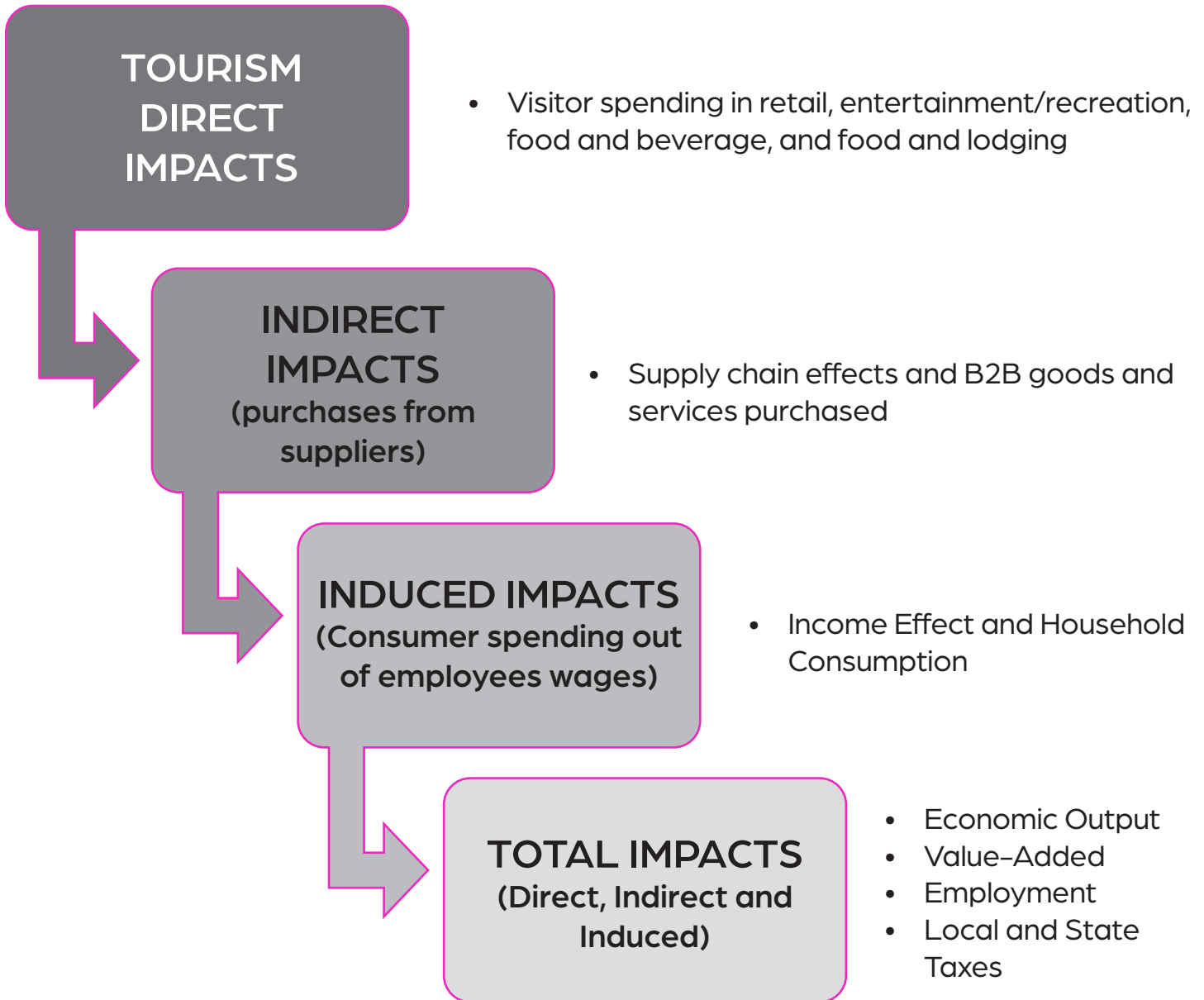
RESEARCH AND DATA GATHERING

- Two custom surveys developed about spending habits of patrons and property owners designed in partnership with Chautauqua Institution and the Chautauqua Property Owner's Association.
- Surveys were distributed during the summer of 2022 from July 5 through July 21 (14 days on Chautauqua Institution grounds) in Bestor Plaza and hand delivered to property owners throughout the Institution.
 - 401 patron surveys collected.
 - This represents a confidence interval of 95% +/- 4.7%.
 - 248 property owner surveys collected.
 - This represents a confidence interval of 95% +/- 5.653%.
- Surveys were also programmed into Survey Monkey and made available for completion online by patrons and property owners. Less than 2% of surveys were completed online and are included in the counts above.
- Eighteen video or telephone interviews were completed with property owners, business owners (on and off Chautauqua Institution grounds) and Chautauqua Institution employees.
- Chautauqua Institution provided expenditure data regarding operations, number of employees and details on spending in and out of county and state.

ANALYSIS

- Surveys were input into Excel, cleaned and validated, and then analyzed utilizing SPSS (statistical analytics software).
- Property owners tax research was completed using individual addresses for property owners throughout Chautauqua Institution³.

³ Source: <https://app.co.chautauqua.ny.us/cctaxonline/#/search>



CHAUTAUQUA INSTITUTION STUDY PROFILE

DATA SOURCE: Chautauqua Institution, Patron Survey and Property Owner Survey

STUDY TYPE: Economic Contribution Analysis

GEOGRAPHY: Chautauqua County, western New York and New York state

BASELINE STUDY YEAR: 2019

METHODOLOGY: IMPLAN



The impact presented in this analysis is broken down into three categories: direct, indirect, and induced impact. The indirect and induced impacts are commonly referred to as the “multiplier effect.”

DIRECT	INDIRECT	INDUCED
<p>Direct effects are changes in economic activity during the first round of spending. For Chautauqua Institution this involves the impacts on tourism industries themselves (businesses selling directly to patrons on and off the property), operational spending and capital spending.</p>	<p>Indirect effects are changes in sales, income or employment within the region in backward-linked industries supplying goods and services to tourism related businesses. For example, the increased sales in restaurant supply firms resulting from more food and beverage sales is an indirect effect of patron spending.</p>	<p>Induced effects are the increased sales within the region from household spending of the income earned in tourism and supporting industries. Employees in tourism and supporting industries spend the income they earn from tourism on housing, utilities, groceries, and other consumer goods and services. This generates sales, income and employment throughout Chautauqua County, western New York and New York economy.</p>

KEY CATEGORIES OF IMPACT

EMPLOYMENT IMPACT is an industry-specific mix of full-time, part-time, and seasonal employment – it is not equal to full-time equivalents. It follows the same definition used by the Bureau of Labor and Statistics and Bureau of Economic Analysis.

ECONOMIC OUTPUT is equal to the value of industry production: annual production estimates in producer prices. For the service sectors, output = production = sales. For the retail and wholesale sectors, output = gross margin, not gross sales.

VALUE-ADDED is the difference between Output and the cost of Intermediate Inputs throughout a defined economy during a specified period of time. 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). Value-Added is equivalent to the industry’s contribution to Gross Domestic Product (GDP).

TOURISM PROFILE IN CHAUTAUQUA COUNTY

Tourism is a major driver in New York state supporting and sustaining billions in impact and hundreds of thousands of jobs annually. New York State is divided into 11 vacation regions – Chautauqua Institution is in the Chautauqua-Allegany region.

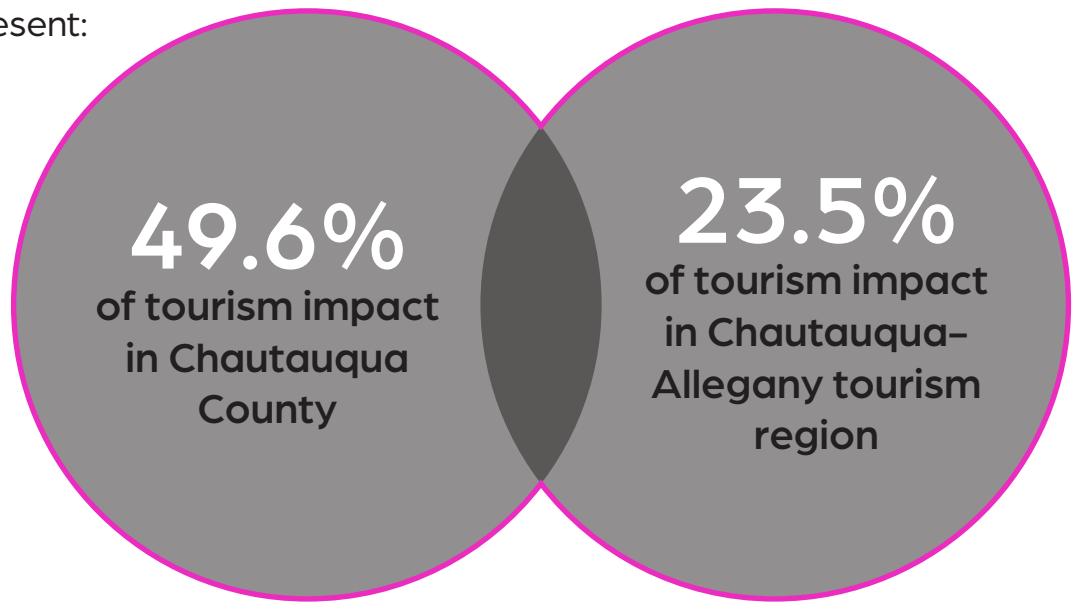
The data table below captures the tourism impact for Chautauqua County, Chautauqua-Allegany and New York state for 2019 as analyzed by Tourism Economics.

Regional Profile: Economic Impact of Tourism in 2019		
		2019
Chautauqua County	Economic Impact of Tourism Industry	\$282 million
	Employment Impact of Tourism Industry	5,194 jobs
	Tax impact of Tourism Industry	\$35.9 million
Chautauqua-Allegany	Economic Impact of Tourism Industry	\$596 million
	Employment Impact of Tourism Industry	11,377 jobs
	Tax impact of Tourism Industry	\$73.4 million
New York state	Economic Impact of Tourism Industry	\$118.6 billion
	Employment Impact of Tourism Industry	811,759 jobs
	Tax impact of Tourism Industry	\$19.3 billion

Source: Tourism Economics 2019



Using 2019 Tourism Economics data as a comparison year, Chautauqua Institution Patron Impacts represent:



Research of top tourism sites throughout western New York reveal that Chautauqua Institution is a major tourist attraction in the region, responsible for nearly 1/2 of the tourism in Chautauqua County and 23.5% when considering tourism in the Chautauqua-Allegany region, which is composed of Chautauqua, Cattaraugus, and Allegany counties. Adding credence to the state tourism data, survey data from the Chautauqua County Visitors Bureau revealed that 55.97% of visitors they surveyed went to Chautauqua Institution during their visit⁴.

TYPE OF PATRONS OR VISITORS

The types of patron/visitor spending captured in the study included both long- and short-term guests to Chautauqua Institution. In 2019, 103,488 visitors came to Chautauqua Institution. Based on survey data collected by Parker Philips in the summer of 2022, 6.1% of patrons were local day visitors (traveling from less than 50 miles away), 8.3% of patrons were non-local day visitors (traveling from more than 50 miles away) and 85.6% of patrons were overnight guests.

Chautauqua Institution provides visitors with access to accommodations at the Athenaeum Hotel (152 rooms) and Bellinger Hall dormitory (116 rooms). Privately owned rental opportunities are available from single-family homes, condominiums, apartments, hotels and inns, historic inns and rooms at denominational houses. Chautauqua Institution has a thriving property rental market for guests. Patrons of Chautauqua Institution live in and rent homes and partial homes and stay in hotel and motel accommodations around the more than 20 communities surrounding and adjacent to Chautauqua Lake.

⁴ Chautauqua County Visitors Bureau. Chautauqua County, NY Marketing Survey 2022.

CHAUTAUQUA INSTITUTION ECONOMIC OUTPUT

Chautauqua Institution contributes to the local economy through expenditures on operations, capital projects and wages, and the spending of patrons throughout Chautauqua Institution and surrounding western New York communities. The direct, day-to-day expenditures of Chautauqua Institution, combined with tourism spending and property owner spending, cause a ripple effect throughout the local economy. The economic impact of Chautauqua Institution and related tourism on Chautauqua County totaled \$233.1 million. This contribution to the local economy is a point-in-time (2019) snapshot depicting how the expenditures of Chautauqua Institution, patron spending and property owners on the grounds make an impact. The impact can increase or decrease dependent upon number of patrons and spending by administration and property owners.

OPERATIONS CONTRIBUTION

Chautauqua Institution operation and capital spending contributed a total of \$57.3 million to the statewide economy. Operations and capital spending generated \$39.6 million direct economic impact, \$8.7 million indirect economic impact, and \$8.9 million induced economic impact.

PATRON CONTRIBUTION

Patron spending contributed a total of \$139.8 million. Patrons of Chautauqua Institution generated \$99.0 million direct economic impact, \$17.2 million indirect economic impact, and \$23.6 million induced economic impact.



PROPERTY OWNER CONTRIBUTION

Property owner spending contributed a total of \$36 million. Expenditures include, construction and remodeling, landscaping, and costs of daily living. Property owners in Chautauqua Institution generated \$24.3 million direct economic impact, \$6.7 million indirect economic impact, and \$5 million induced economic impact.

Economic Impact of Chautauqua Institution on Chautauqua County (Economic Output)				
	Direct	Indirect	Induced	Total
Operations	\$39,646,608	\$8,718,236	\$8,893,418	\$57,258,262
Patrons	\$99,053,709	\$17,203,015	\$23,572,573	\$139,829,297
Property Owners	\$24,306,430	\$6,698,043	\$4,980,310	\$35,984,783
Total	\$163,006,747	\$32,619,294	\$37,446,301	\$233,072,342

Source: Parker Philips using data from IMPLAN

CHAUTAUQUA INSTITUTION VALUE-ADDED IMPACT

The value-added contribution of Chautauqua Institution and related tourism on Chautauqua County totaled \$129.3 million. This metric shows the contribution of Chautauqua Institution to gross domestic product through operations, patron spending and property owner spending.

OPERATIONS CONTRIBUTION

Chautauqua Institution operation and capital spending contributed a total of \$27.8 million to the statewide economy. Operations and capital spending generated \$18.4 million direct value-added impact, \$4.3 million indirect value-added impact, and \$5.2 million induced value-added impact.

PATRON CONTRIBUTION

Patron spending contributed a total of \$85 million in value-added impact. Patrons of Chautauqua Institution generated \$63.6 million direct value-added impact, \$8.1 million indirect value-added impact, and \$13.3 million induced value-added impact.

PROPERTY OWNER CONTRIBUTION

Property owner spending contributed a total of \$16.4 million. Property owners in Chautauqua Institution generated \$10 million direct economic impact, \$3.5 million indirect economic impact, and \$3 million induced value-added impact.

Value-Added Impact of Chautauqua Institution on Chautauqua County				
	Direct	Indirect	Induced	Total
Operations	\$18,385,768	\$4,270,740	\$5,193,459	\$27,849,967
Patrons	\$63,570,538	\$8,105,753	\$13,308,970	\$84,985,261
Property Owners	\$10,008,474	\$3,544,930	\$2,884,630	\$16,438,034
Total	\$91,964,780	\$15,921,423	\$21,387,059	\$129,273,262

Source: Parker Philips using data from IMPLAN



CREATING AND SUSTAINING JOBS THROUGHOUT CHAUTAUQUA COUNTY

Chautauqua Institution supports a combined total of 3,208 full-time and part-time jobs throughout the county.

OPERATIONS CONTRIBUTION

Chautauqua Institution support and sustain a total of 1,572 jobs – 1,448 direct jobs, 60 indirect jobs and 64 induced jobs.

PATRON CONTRIBUTION

Patrons of Chautauqua Institution supported and sustained a total of 1,371 jobs as a result of their spending – 1,081 direct jobs, 126 indirect jobs and 164 induced jobs.

PROPERTY OWNER CONTRIBUTION

Property owners of Chautauqua Institution supported and sustained a total of 265 jobs as a result of their spending – 181 direct jobs, 46 indirect jobs and 38 induced jobs.

Employment Impact of Chautauqua Institution on Chautauqua County (jobs)				
	Direct	Indirect	Induced	Total
Operations	1,448 jobs	60 jobs	64 jobs	1,572 jobs
Patrons	1,081 jobs	126 jobs	164 jobs	1,371 jobs
Property Owners	181 jobs	46 jobs	38 jobs	265 jobs
Total	2,710 jobs	232 jobs	266 jobs	3,208 jobs

Source: Parker Philips using data from IMPLAN

Based on analysis by industry sector, jobs supported in the Chautauqua County economy impacted as a result of Chautauqua Institution include: (1) tourism-related jobs on and off grounds – hotels, restaurants, retail entertainment venues, (2) household sectors in the economy supporting the employees of Chautauqua Institution and employees of local suppliers, and (3) local suppliers working with Chautauqua Institution and property owners.

GENERATING LOCAL AND STATE TAX REVENUES

Chautauqua Institution, its employees, patrons, property owners, suppliers and related constituencies, contribute significantly to the local and statewide tax bases. Chautauqua Institution, related tourism and property owners contributed an estimated \$28.8 million in state and local taxes through local spending (operational, tourism and property owners), as well as direct and indirect support of jobs. Property owners contributed a total of \$10.4 million in school and property taxes to Chautauqua County.

At the state and local levels, Chautauqua Institution and related tourism contributes to the tax bases through its purchasing. Specific taxes include employee and employer contributions to state and local social insurance funds, sales taxes, personal property taxes, occupancy tax, taxes paid on motor vehicle licenses and payments of fines and fees.

Chautauqua Institution Local and State Tax Impacts		
Chautauqua Institution Operations	Direct	\$3,167,894
	Indirect	\$511,830
	Induced	\$815,737
	Total	\$4,495,460
Patrons	Direct	\$9,079,926
	Indirect	\$1,270,933
	Induced	\$2,216,065
	Total	\$12,566,924
Chautauqua Property Owners	Direct	\$10,355,759
	Indirect	\$922,301
	Induced	\$469,107
	Total	\$11,747,167
Total All Taxes	Direct	\$22,603,579
	Indirect	\$2,705,064
	Induced	\$3,500,909
	Total	\$28,809,551



CHAUTAUQUA INSTITUTION PROPERTY OWNERS GENERATE IMPACT



Chautauqua Property Owners spend an average of **\$33,654** per year to live in Chautauqua Institution.



Chautauqua Property Owners promote Chautauqua Institution to friends and family far and wide. They attract

27,000 visitors per year generating **\$36.5M** in economic impact for Chautauqua County.



Chautauqua Property Owners volunteer for **60 hours**

annually on average to enhance the Chautauqua experience and help the community at large.



Chautauqua Property Owners donate on average **\$3,577** per year to support Chautauqua Institution.

Chautauqua Property Owners generate **\$37.9 million** in annual economic impact in Chautauqua County.



Chautauqua Property Owners support and sustain **265 jobs** (full- and part-time).



Chautauqua Property Owners pay a total of **\$10.4 million** in property and school taxes and **\$11.7 million** total in taxes.

Chautauqua Property Owners are engaged and invested in the future of this one-of-a-kind locale. Chautauqua Institution is a place that they value and call home, even if for only a few months a year. The cherished traditions keep them coming back for generations and inspire new visitors to take the plunge into property ownership on the grounds or nearby after visiting for only a few summers. For many, owning a property in Chautauqua Institution is a labor of love and includes a firm commitment to an ideal that goes beyond the typical person that buys a vacation home. This is a group that values the Chautauqua experience and is engaged and invested in the growth and success of the Institution. Vacation communities are abundant in the United States, but there is a unique quality common among Chautauqua Institution property owners; they are dedicated to the four pillars of the Institution⁵ and strive to preserve that tradition while also planning for the future.

“Chautauqua is home. It is our multi-generational homebase even though it isn’t our primary residence. We have formed deep friendships and shared experiences that keep us coming back year after year. It is always a deep sigh of relief to be back.”

– Melissa Orlov, Chautauqua Property Owner

⁵ Source: <https://www.chq.org/about/>



An estimated \$5.2 million given back to Chautauqua Institution by Chautauqua Property Owners annually



The impact of this commitment is felt throughout Chautauqua Institution and beyond from both social and economic perspectives. Property owners give of their time on and off the grounds through community groups and directly in service to the Institution. The combined number of property owner volunteer hours totals 37,777 annually, which are valued

at \$1.1 million. Their spending with local contractors, landscapers and vendors, for example, to update and maintain their properties makes an impact. Property owner spending generates \$36 million annually in Chautauqua County, supports 265 jobs and generates \$11.7 million in state and local taxes (including property, school, fire and EMS).

SCHOOL AND PROPERTY TAXES MAKE AN IMPACT IN CHAUTAUQUA COUNTY

Property owners in Chautauqua Institution paid \$10,355,759 in real property taxes – \$5,798,798 Total City/County Taxes and \$4,556,961 in School Taxes.⁶ This represents 14.9% of all real property taxes paid in the county⁷ but only represents 2% of all taxable properties in the county.

CHAUTAUQUA INSTITUTION PROPERTY OWNERS OWN 2% OF THE PROPERTIES IN CHAUTAUQUA COUNTY AND PAY 15% OF REAL PROPERTY TAXES.

⁶ Source: <https://app.co.chautauqua.ny.us/cctaxonline/#/search>

⁷ In 2021, Real Property Tax collected in Chautauqua County: \$69,427,645. Total housing units in Chautauqua County, NY: 66,338 (U.S. Census). Median value of owner-occupied housing units in Chautauqua County 2017-2021: \$96,000

INVESTING TIME AND MONEY TO SUSTAIN THE SPIRIT OF CHAUTAUQUA

Chautauqua Property Owners are deeply committed to Chautauqua Institution and owning a home there. While some property owners are residents of Chautauqua County year-round, many arrive in June for the much-anticipated season. They support the mission and vision of the Institution by participating in the labor force, providing accommodations, giving of their time on and off grounds, and through direct philanthropy to the Institution. Chautauqua Property Owners give an estimated \$5.2 million to Chautauqua Institution annually, which is the sum of \$4.1 million in direct donations to the Institution and \$1.1 million in volunteer hours⁸. In 2019, property owners accounted for 16.5% of donors to Chautauqua Institution and contributed 45.4% of the philanthropy raised in that year⁹.

Chautauqua Property Owners Chautauqua Institution Total Giving (2019)				
	Property Owners		Percentages	
Donor Category	Number of Donors	Amount Given	% Donors	% Dollars
Total	636	\$4,088,647	16.5%	45.4%

Source: Chautauqua Institution

PROMOTION AND SUPPORT OF CHAUTAUQUA INSTITUTION

The majority of property owners surveyed reported that they talk about their love of Chautauqua to friends and invite as many friends and family to visit as possible. Their involvement in the Institution is a point of pride and personal fulfillment that they wish to continue for generations. This promotion and word of mouth endorsement of Chautauqua Institution results in the attraction of an estimated 27,000 visitors (27% of Chautauqua’s summer visitors) to Chautauqua Institution which results in an economic impact of \$36.5 million on Chautauqua County.

⁸The value of a volunteer hour is \$29.95 according to the University of Maryland Do Good Institute.

⁹These donations are directly made by property owners and do not reflect memorial donations or corporate match.

***“No matter where we are in the world, Chautauqua is always home.
It is where our family gathers.”***

– Elisabeth Groninger, Chautauqua Property Owner

**CHAUTAUQUA INSTITUTION
COMMUNITY GROUPS INCLUDE:**

- African American Heritage House
- Bird, Tree & Garden Club
- Chautauqua Dance Circle
- Chautauqua Literary & Scientific Circle Alumni Association
- Chautauqua Property Owners Association
- Chautauqua Symphony Orchestra League
- Chautauqua Women’s Club
- Denominational Houses and Religious Organizations
- Friends of Chautauqua Theater Company
- Friends of Chautauqua Visual Arts
- Friends of the Chautauqua Writers’ Center
- LGBTQ and Friends
- NOW Generation
- Opera Guild

...AND MORE

Community groups add significantly to the programming options available through Chautauqua Institution. Analysis of weekly scheduled programming during the 2022 season revealed that on average, 37.9% of daily programming is provided by community organizations that are powered primarily by volunteers – many of whom are Chautauqua Property Owners. It would be impossible to capture the story of each of the community groups at Chautauqua and their full value proposition. We offer three profiles as examples of the nature and scope of community organization impact.

The **Chautauqua Women’s Club (CWC)** is active in Chautauqua Institution adding value to program offerings, recreational opportunities, shopping at the Flea Boutique, scholarships (\$1.8 million donated to the Institution for scholarships over the past 36 years) and accommodations. The Chautauqua Women’s Club conducts three program platforms during the season including the

Contemporary Issues Forum offered on Saturday afternoons, Chautauqua Dialogues and Chautauqua Speaks. They also offer recreational programs including mahjong, bridge, language hour in five languages, community social events and international travel programs. The CWC house provides accommodations during the summer season or whole house rentals in the off-season for the community or weddings.

The **Chautauqua Bird, Tree and Garden Club (BT&G)** offers patrons and property owners new and exciting ways to learn about and explore nature. The BT&G offers daily programming and tours (at least one event per day) – including a guided nature walk, brown bag lunch with expert speaker, tree walk, lake talk, and purple martin chat. With their new, free app ExploreCHQ – the club has increased access to information about Chautauqua’s natural world 365 days of the year, with guided tours, beautiful photos, interesting commentary and educational facts about nature. The BT&G raises and administers an annual budget of \$100,000 dedicated to events that draw in visitors. Strong collaboration between Chautauqua Institution administration and the 18-member board are the recipe for success.

Denominational houses and religious organizations at Chautauqua Institution offer religious services, lectures, and low-cost, highly satisfying housing options during the nine-week Summer Assembly.

The term “denomination” in Chautauqua usage is a very inclusive term meaning an institutional faith organization. The 15 denominations at Chautauqua include the Baha’i Faith, Baptist, Catholic, Christian Science, the Christian Church (Disciples of Christ), Episcopal, Chabad-Lubavitch Community (Orthodox Jewish), Hebrew Congregation (Reform Jewish), Lutheran, Presbyterian, the Religious Society of Friends (Quaker), United Church of Christ (UCC), United Methodist, Unitarian Universalist Fellowship (UU), and Unity.

Twelve of these denominations have denominational houses on the grounds: Baptist, Catholic, Christian Science, the Christian Church (Disciples of Christ), Episcopal, Chabad-Lubavitch Community (Orthodox Jewish), Lutheran, Presbyterian, the Religious Society of Friends (Quaker), United Church of Christ (UCC), United Methodist, Unitarian Universalist Fellowship (UU). The Everett Jewish Life Center is inclusive of all branches of Judaism. All denominational houses are open to all.

Religious organizations (not denominations) at Chautauqua that offer religious services, programming and/or housing include the International Order of the King’s Daughters and Sons (IOKDS), Chautauqua Christian Fellowship (CCF), and the Ecumenical Community of Chautauqua (ECOC).



THE REST OF THE PROPERTY OWNER IMPACT STORY

The impact of Chautauqua Property Owners reaches far beyond mere attendance numbers, purchasing behavior, philanthropic gifts, and other quantifiable indicators. Property owners are the Institution’s living endowment. Generational families and families who have recently discovered Chautauqua alike become deeply committed to this community and its mission, and their continuing engagement is significant to the sustainability and viability of Chautauqua Institution.

“The Chautauqua Boys’ and Girls’ Club is foundational to the experience at Chautauqua Institution. Kids make lifelong friends that keep them coming back for generations.”

- Jenn Flanagan, Lifelong Chautauqua Institution Property Owner

CONCLUSION

The annual economic contributions of Chautauqua Institution, its more than 100,000 summer patrons, year-round patrons and 1,175 property owners are significant to the viability of the Chautauqua region, and central to the tourism economy of the Chautauqua-Allegany vacation region. Each year, \$233.1 million in total economic impact is generated in Chautauqua County, 3,208 jobs are supported and sustained, and \$28.8 million is contributed to the state and local tax base. Chautauqua Property Owners pay \$10.4 million in property and school taxes to the Chautauqua tax base, representing 15% of all real property taxes paid in the county¹⁰ from only 2% of all taxable properties in the county. Their annual spending, philanthropy and volunteerism multiply that impact considerably.

For Chautauqua Institution to continue to thrive and deepen this impact, ongoing engagement and support of regional and statewide patrons, foundations, government officials, and others is requested. Program attendance, philanthropic gifts, and word-of-mouth advocacy by those closest to Chautauqua are critical sources of support to ensure Chautauqua’s vibrancy for another 150 years and beyond.

¹⁰In 2021, Real Property Tax collected in Chautauqua County: \$69,427,645. Total housing units in Chautauqua County, NY: 66,338 (U.S. Census). Median value of owner-occupied housing units in Chautauqua County 2017-2021: \$96,000.

APPENDIX A: TERMS & DEFINITIONS

Direct Employment

Total number of employees, both full-time and part-time, at the organization based on total jobs, not FTEs.

Direct Impact

All direct expenditures made by an organization due to its operating expenditures. These include operating expenditures and pay and benefits expenditures.

Dollar Year

Presented in 2021 dollars.

Government Revenue/State and Local Tax Impact

Government revenue or tax revenue that is collected by governmental units at the state and local levels in addition to those paid directly by an organization. This impact includes taxes paid directly by the organization itself, employees of the organization and vendors who sell products to the organization and at the household level.

Indirect

The indirect impact includes the impact of local industries buying goods and services from other local industries. The cycle of spending works its way backward through the supply chain until all money is spent outside of the local economy, either through imports or by payments to value-added (multiplier effect).

Indirect Employment

Additional jobs created as a result of an organization's economic impact. Local companies or vendors that provide goods and services to an organization increase their number of employees as purchasing increases, thus creating an employment multiplier.



APPENDIX A: TERMS & DEFINITIONS

Induced

The response by an economy to an initial change (direct effect) that occurs through re-spending of income received by a component of value-added. IMPLAN's default multiplier recognizes that labor income (employee compensation and proprietor income components of value-added) is not lost to the regional economy. This money is recirculated through household spending patterns causing further local economic activity (multiplier effect).

Induced Employment

Additional jobs created as a result of household spending by employees of an organization and the employees of vendors. This is another wave of the employment multiplier.

Multiplier Effect

The multiplier effect is the additional economic impact created as a result of the organization's direct economic impact. Local companies that provide goods and services to an organization increase their purchasing by creating a multiplier (indirect/supply chain impacts). Household spending generated by employees of the organization and the organization's suppliers create a third wave of multiplier impact (induced/household spending impacts).

Patron Type

Three types of patrons are defined in the study: local day patron travels from less than 50 miles away, day patron travels more than 50 miles and overnight patrons.

Value-Added

The difference between Output and the cost of Intermediate Inputs throughout a defined economy during a specified period of time. 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). Value-Added is equivalent to the industry's contribution to GDP.

APPENDIX B: DATA & METHODS

Data used to complete the Chautauqua Institution's contribution analysis was provided by: Chautauqua Institution, survey data collected from patrons and property owners and data compiled from the Chautauqua County property tax rolls. Data supplied from Chautauqua Institution included: operating expenditures, total employees, pay and benefits and number of patrons. Primary data was used to complete the input-output models in IMPLAN. The study approach and economic impact findings are a conservative estimate of impact and are based on actual financial information. The study is a snapshot of the economic impact of the Chautauqua Institution in a point in time – numbers can fluctuate based on institutional spending and patron and property owner spending.

OVERVIEW AND THE IMPLAN MODEL

The most common and widely accepted methodology for measuring the economic impacts of economic sectors is input-output (I-O) analysis. At its core, an I-O analysis is a table that records the flow of resources to and from companies/organizations and individuals within a region at a given time. For a specified region like a state of the nation, the input-output table accounts for all dollar flows between different sectors of the economy in a given time period. With this information, a model can then follow how a dollar added into one sector is spent and re-spent in other sectors of the economy, generating outgoing ripples of subsequent economic activity. This chain of economic activity generated by one event is called the "economic multiplier" effect.

The primary tool used in the performance of this study is the I-O model and dataset developed and maintained by IMPLAN Group LLC (formerly Minnesota IMPLAN Group Inc.). IMPLAN is a widely accepted and used software model first developed by the U.S. Forest Service in 1972. That data used in the baseline IMPLAN model and dataset come largely from federal government databases. The input-output tables themselves come from the Bureau of Economic Analysis. Much of the annual data on labor, wages, final demand and other market data comes from the Bureau of Labor Statistics, the U.S. Census Bureau and other government sources.

Government agencies, companies and researchers use IMPLAN to estimate the economic activities associated with spending in a particular industry or on a particular project. The IMPLAN model extends conventional I-O modeling to include the



APPENDIX B: DATA & METHODS

economic relationships between government, industry and household sectors, allowing IMPLAN to model transfer payments such as taxes. Producers of goods and services must secure labor, raw materials and other services to produce their product.

The resources transferred to the owners of that labor or those raw materials and services are then spent to secure additional goods and services or inputs to the products they sell. For example, an organization in a region may develop a company that produces trains with a value of \$1 million. However, to produce that product, they may be required to spend \$500,000 in wages and benefits, \$200,000 to supplier of parts, \$100,000 for electricity, \$50,000 for transportation of goods and raw materials to and from the plant and \$50,000 in various professional services associated with operating a business (e.g., attorneys and accountants). The suppliers will, in turn, spend those resources on labor and raw materials necessary to produce trains. Workers and the owners of the company will buy goods and services from other firms in the area (e.g., restaurants and gas stations) and pay taxes. The suppliers, employees and owners of this second tier will, in turn, spend those resources on other goods and services within the study region or elsewhere. The cycle continues until all of the money leaves the region.

IMPLAN METHODOLOGY

The model uses national production functions for over 536 industries to determine how an industry spends its operating receipts to produce its commodities. These production functions are derived from U.S. Census Bureau data. IMPLAN couples the national production functions with a variety of county-level economic data to determine the impacts at a state and congressional district level. IMPLAN collects data from a variety of economic data sources to generate average output, employment and productivity for each industry in a given county. IMPLAN combines this data to generate a series of economic multipliers for the study area. The multiplier measures the amount of total economic activity generated by a specific industry's spending an additional dollar in the study area. Based on these multipliers, IMPLAN generates a series of tables to show the economic event's direct, indirect and induced impacts to gross receipts or output, within each of the model's more than 536 industries.

APPENDIX B: DATA & METHODS

The model calculates three types of effects: direct, indirect and induced. The economic impact of the Chautauqua Institution is the sum of these three effects.

CONSIDERATIONS CONCERNING IMPLAN

There are three important points about the use of IMPLAN (or any other input-output model):

1. It is a fixed price model. The model assumes that changes in consumption are not limited by capacity and do not affect prices. This simplifying assumption does not cause a problem for the analysis presented here because we are taking a snapshot of Chautauqua Institution's impact in a specific year.
2. As in many studies using this type of model, the direct impacts are not calculated by the model; they reflect actual spending levels and patterns created by the Chautauqua Institution, patrons and property owners. Changing the level of direct spending allows us to calculate the magnitude of the indirect and induced effects associated with the initial level of spending.
3. Because the model continues to calculate additional spending until all the money leaves the region (i.e., "leakage"), the larger and more economically diverse the region, the longer it will take for spending to leave the region and the larger the impact is likely to be. For example, employees of Chautauqua Institution may spend some amount of their income on buying a new car not assembled or manufactured in New York. Since there are none of these specific car manufacturers in Chautauqua County or in western New York, this spending will leave the region and the multiplier effect will stop. At the national level, some portion of that same spending by that same individual may go to a national auto producer. That spending would lead to more spending at the national level than would be captured by a more regional model. The national impact will be larger than the sum in the individual states and the individual state impact will be larger than the sum of the impacts in its congressional districts.



APPENDIX B: DATA & METHODS

CHAUTAUQUA INSTITUTION ECONOMIC ANALYSIS PROCESS AND UNDERLYING ASSUMPTIONS

Definitions

- The Direct Impact of tourism expenditures become business receipts which in turn are used to pay wages, salaries and taxes.
- Indirect Impacts are attributed to local businesses (on and off the grounds) spending part of their receipts on goods and services needed to serve patrons and property owners. As a result, their suppliers must purchase goods and services from other vendors. This is the ripple effect of economic activity attributed to patron and property owner spending in and outside of Chautauqua County.
- Induced Impacts include the household sector. It is the spending of wages and salaries directly and indirectly generated by employees and suppliers to Chautauqua Institution, patrons and property owners in Chautauqua Institution. Induced effects refer to dollars that are circulated through the spending patterns of households causing a third ripple of economic impact.

Data Collection and Verification

Chautauqua Institution provided detailed data about operational spending and visitor counts for 2019. All data points were described within the data collection form. These include operating expenditures, number of Chautauqua Institution employees and pay and benefits of Chautauqua Institution employees.

Patron Impacts

Patron expenditures are best described as the initial monetary activity that stimulates the production process and initiates realistic measurement of economic benefit or impact. Patron economic impact typically requires three basic inputs: (1) the number and types of patrons, (2) Patron spending patterns and (3) local economic ratios and multipliers. Multipliers for this analysis were obtained from IMPLAN databases in Chautauqua County. This data was collected from patrons in Chautauqua Institution through surveys.

APPENDIX B: DATA & METHODS

Annual visitation averages are applied to three specific patron segments from primary research and survey collection information about patron information data. The type of patrons included in the study are local day (less than 50 miles), non-local day (more than 50 miles) and overnight patrons. The percentage of the overall patrons and their respective segments are represented in the table below Spending by Patron Type.

Spending By Patron Type		
Patron Segment	% of Total Visitation	Average Daily Spending
Local Day	6.1%	\$76.67
Non-Local Day	8.3%	\$187.90
Overnight	85.6%	\$370.10

The average length of stay for overnight visitors was 3.3 days

Each patron type spends varying amounts of money while visiting Chautauqua Institution. The spending estimates of these groups are then applied to spending averages from the spending patterns analyzed from the survey data. The ratio of Chautauqua Institution patrons and spending averages are then calculated to provide total spending estimates for each type of spending associated with visitation and tourism, represented in the table below.

Spending Percentages by Patron Type								
	Hotel or Motel	Rental home, apartment, room, or condo	Restaurants & bars	Gate Passes and Other Amusements	Groceries	Gasoline	Local Transportation	Retail Purchases
Local day-trip spending percentages	0.0%	0.0%	37.4%	48.2%	2.64%	3.9%	0.0%	7.9%
Non-local day-trip spending percentages	0.0%	0.0%	20.3%	50.9%	3.5%	6.2%	7.0%	12.1%
Overnight spending percentages	18.8%	34.87%	10.6%	16.6%	13.1%	3.5%	1.1%	5.7%



APPENDIX B: DATA & METHODS

Each spending category has an associated IMPLAN code for which it is related to within the IMPLAN Pro Software. The spending category and IMPLAN codes are detailed in the table below Spending Estimates by IMPLAN Sector.

Spending Estimates by IMPLAN Sector		
IMPLAN Sector	Sector Name	Spending Type
406	Retail - Food and beverage stores	Groceries
408	Retail - Gasoline stores	Gas & oil
410	Retail - Miscellaneous store retailers	Retail Purchases
520	Transit and ground passenger transportation	Local transportation
501	Museums, historical sites, zoos and parks	Amusements
507	Hotels and motels, including casino hotels	Motel, hotel, bed and breakfast
508	Other lodging accommodations	Rental fees for houses, apartments, rooms and condominiums
510	Limited-service restaurants	Restaurants & bars

The next step is entering the spending amounts into the IMPLAN software. Local patron spending is included in the economic benefits measures, as this captures all economic activity associated with patron visits, including local and non-local patrons. Spending by local residents on visits to Chautauqua Institution does not represent new money to the region.

OPERATIONAL IMPACTS

The operational impacts of Chautauqua Institution are calculated based on operational expenditures, number of jobs and a fully loaded payroll. The employment or spending is entered into the IMPLAN model within Sector 482, other educational services.

APPENDIX B: DATA & METHODS

The analysis completed for the operational impact uses actual expenditures and Chautauqua Institution employment numbers to drive the total economic contribution analysis of employment, income and tax revenue. Operational impacts refer to the day-to-day management, coordination and activities executed by Chautauqua Institution. It refers to the impact of keeping the business running daily as a not-for-profit organization in New York.

PROPERTY OWNER IMPACTS

The property owner impacts are calculated based upon survey data about spending on property maintenance (indoor and outdoor), landscaping, Chautauqua Institution fees and gate passes and volunteer and donor activities. IMPLAN sectors utilized include:

- 61 - Maintenance and repair of residential structures
- 477 - Landscaping
- 531 - Utilities
- 482 - Other Educational Services



APPENDIX C: CHAUTAUQUA INSTITUTION IMPACT ON WESTERN NEW YORK

Western New York is defined as Allegany, Cattaraugus and Chautauqua Counties. The impacts below mirror the tourism region.

Economic Impact of Chautauqua Institution on Western New York				
	Direct	Indirect	Induced	Total
Operations	\$41,748,819	\$8,088,555	\$8,462,022	\$58,299,396
Patrons	\$103,808,287	\$18,028,760	\$24,704,057	\$146,541,103
Property Owners	\$25,473,139	\$7,019,549	\$5,219,265	\$37,712,053
Total	\$171,030,245	\$33,136,864	\$38,385,443	\$242,552,552

Source: Parker Philips using data from IMPLAN

Value-Added Impact of Chautauqua Institution on Western New York				
	Direct	Indirect	Induced	Total
Operations	\$19,312,906	\$3,852,424	\$4,889,708	\$28,055,038
Patrons	\$66,621,924	\$8,494,829	\$13,947,800	\$89,064,553
Property Owners	\$10,488,881	\$3,715,087	\$3,023,093	\$17,227,060
Total	\$96,423,711	\$16,062,340	\$21,860,601	\$134,346,651

Source: Parker Philips using data from IMPLAN

APPENDIX C: CHAUTAUQUA INSTITUTION IMPACT ON WESTERN NEW YORK

Employment Impact of Chautauqua Institution on Western New York (Jobs)				
	Direct	Indirect	Induced	Total
Operations	1,481 jobs	50 jobs	58 jobs	1,589 jobs
Patrons	1,163 jobs	121 jobs	143 jobs	1,427 jobs
Property Owners	194 jobs	49 jobs	41 jobs	284 jobs
Total	2,838 jobs	220 jobs	242 jobs	3,300 jobs

Source: Parker Philips using data from IMPLAN

Chautauqua Institution Local and State Tax Impacts (Western New York)		
Chautauqua Institution Operations	Direct	\$3,385,641
	Indirect	\$362,762
	Induced	\$720,537
	Total	\$4,468,940
Patrons	Direct	\$9,515,762
	Indirect	\$1,331,938
	Induced	\$2,322,436
	Total	\$13,170,136
Chautauqua Property Owners	Direct	\$10,852,835
	Indirect	\$966,571
	Induced	\$491,624
	Total	\$12,311,030
Total All Taxes	Direct	\$23,754,238
	Indirect	\$2,661,271
	Induced	\$3,534,597
	Total	\$29,950,107

Source: Parker Philips using data from IMPLAN



APPENDIX D: CHAUTAUQUA INSTITUTION IMPACT ON NEW YORK STATE

Western New York is defined as: Allegany, Cattaraugus, Chautauqua, Erie and Niagara Counties.

Economic Impact of Chautauqua Institution on New York State				
	Direct	Indirect	Induced	Total
Operations	\$45,052,964	\$23,253,315	\$18,789,575	\$87,095,854
Patrons	\$99,053,709	\$30,105,067	\$45,632,370	\$174,791,146
Property Owners	\$23,479,536	\$10,619,380	\$9,561,653	\$43,660,569
Total	\$167,586,209	\$63,977,762	\$73,983,598	\$305,547,569

Source: Parker Philips using data from IMPLAN

Value-Added Impact of Chautauqua Institution on New York State				
	Direct	Indirect	Induced	Total
Operations	\$20,194,597	\$13,664,556	\$12,441,764	\$46,300,917
Patrons	\$72,249,913	\$17,690,219	\$29,476,414	\$119,416,546
Property Owners	\$12,520,935	\$6,522,557	\$6,502,252	\$25,545,744
Total	\$104,965,445	\$37,877,332	\$48,420,430	\$191,263,207

Source: Parker Philips using data from IMPLAN

APPENDIX D: CHAUTAUQUA INSTITUTION IMPACT ON NEW YORK STATE

Employment Impact of Chautauqua Institution on New York (jobs)				
	Direct	Indirect	Induced	Total
Operations	1,646 jobs	82 jobs	93 jobs	1,821 jobs
Patrons	1,211 jobs	127 jobs	220 jobs	1,558 jobs
Property Owners	203 jobs	52 jobs	43 jobs	298 jobs
Total	3,060 jobs	261 jobs	356 jobs	3,677 jobs

Source: Parker Philips using data from IMPLAN

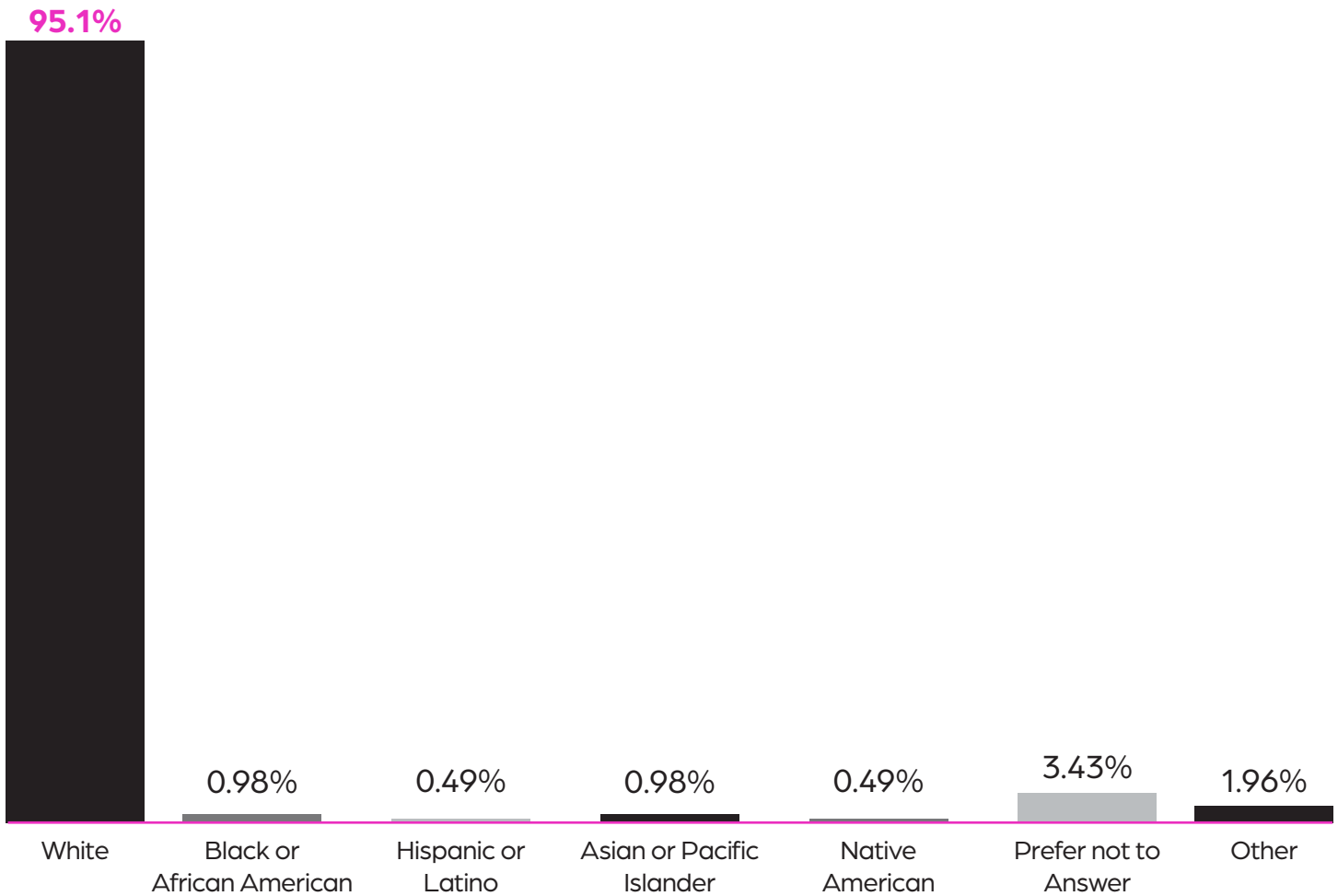
Chautauqua Institution Local and State Tax Impacts (New York)		
Chautauqua Institution Operations	Direct	\$3,697,865
	Indirect	\$1,069,160
	Induced	\$1,430,249
	Total	\$6,197,274
Patrons	Direct	\$10,840,941
	Indirect	\$1,606,398
	Induced	\$3,387,750
	Total	\$15,835,090
Chautauqua Property Owners	Direct	\$10,987,413
	Indirect	\$973,702
	Induced	\$769,053
	Total	\$12,730,168
Total All Taxes	Direct	\$25,526,219
	Indirect	\$3,649,260
	Induced	\$5,587,052
	Total	\$34,762,531



APPENDIX E: PROPERTY OWNER DEMOGRAPHICS

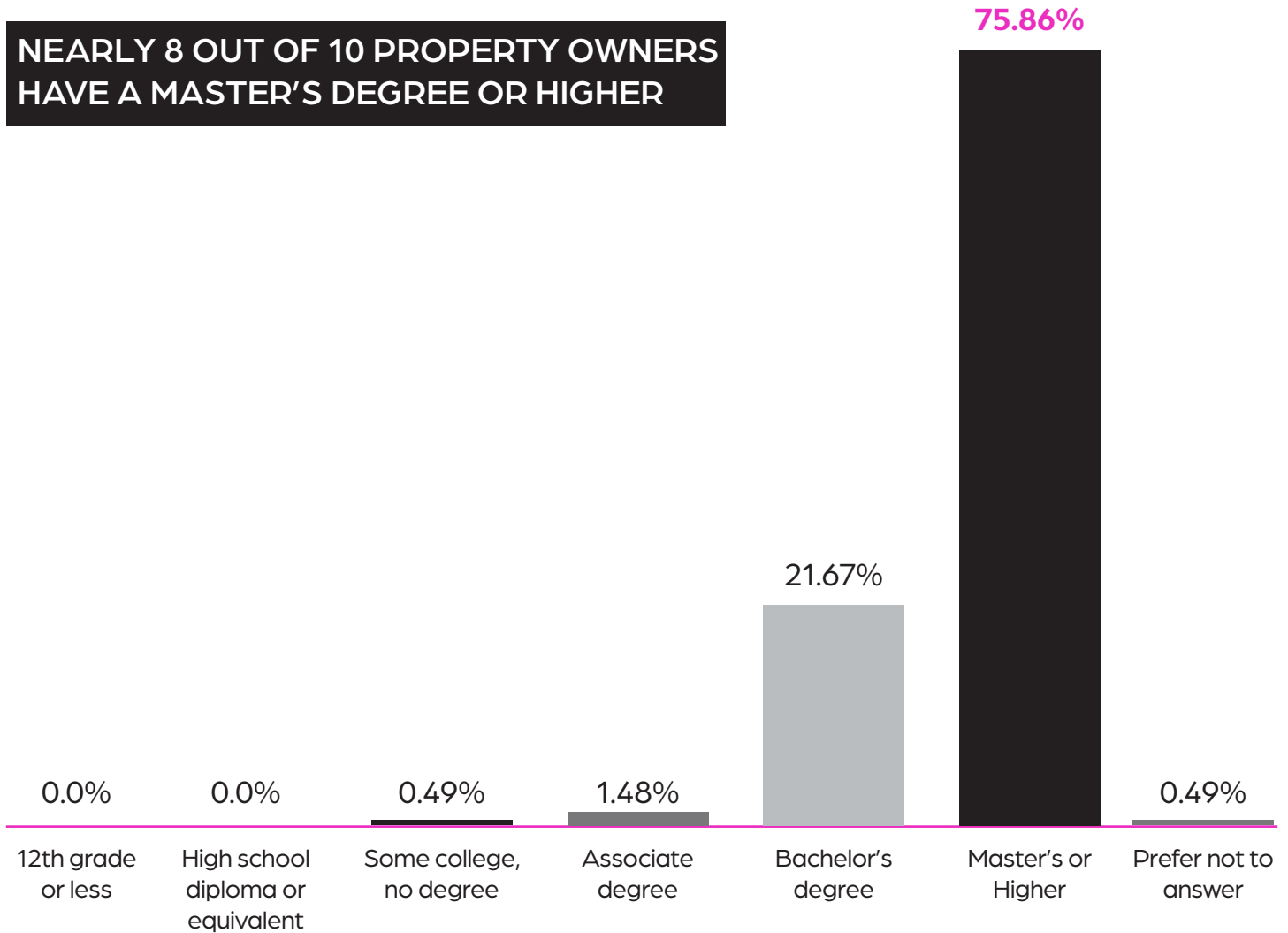
The data below summarizes the demographic profile of Chautauqua Institution Property Owner survey respondents.

95.1% OF PROPERTY OWNERS ARE WHITE

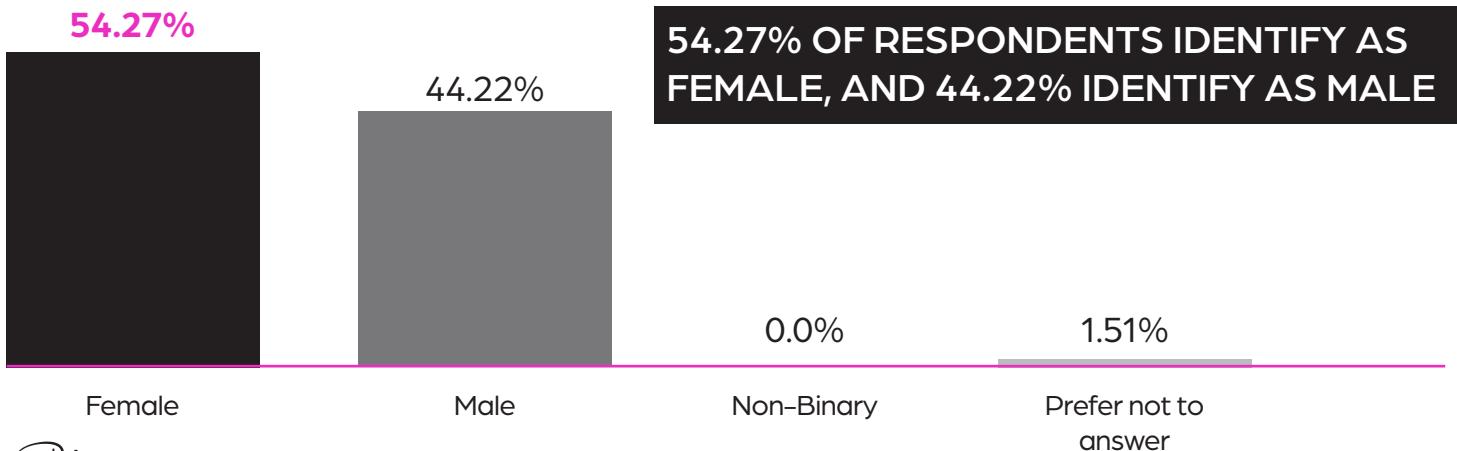


APPENDIX E: PROPERTY OWNER DEMOGRAPHICS

NEARLY 8 OUT OF 10 PROPERTY OWNERS HAVE A MASTER'S DEGREE OR HIGHER



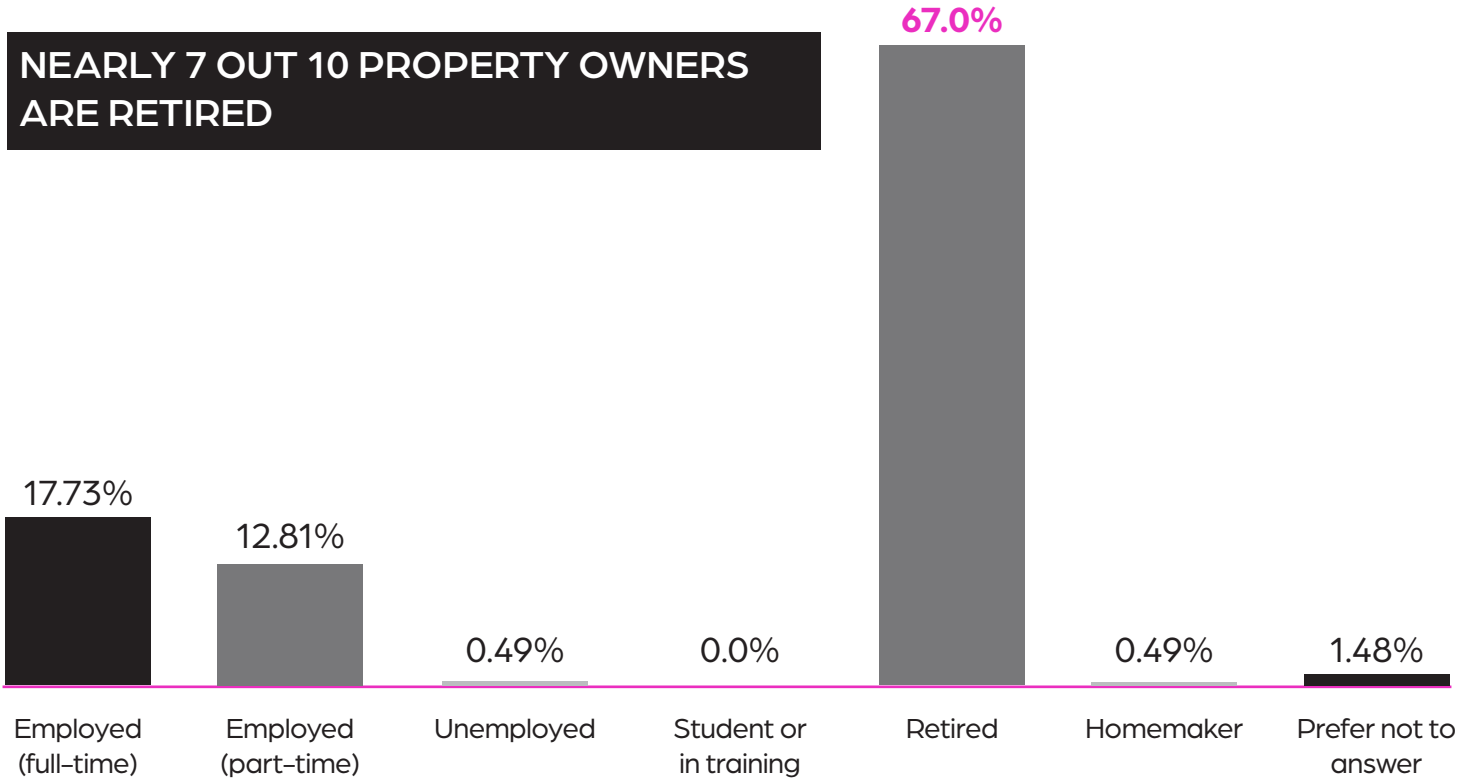
54.27% OF RESPONDENTS IDENTIFY AS FEMALE, AND 44.22% IDENTIFY AS MALE



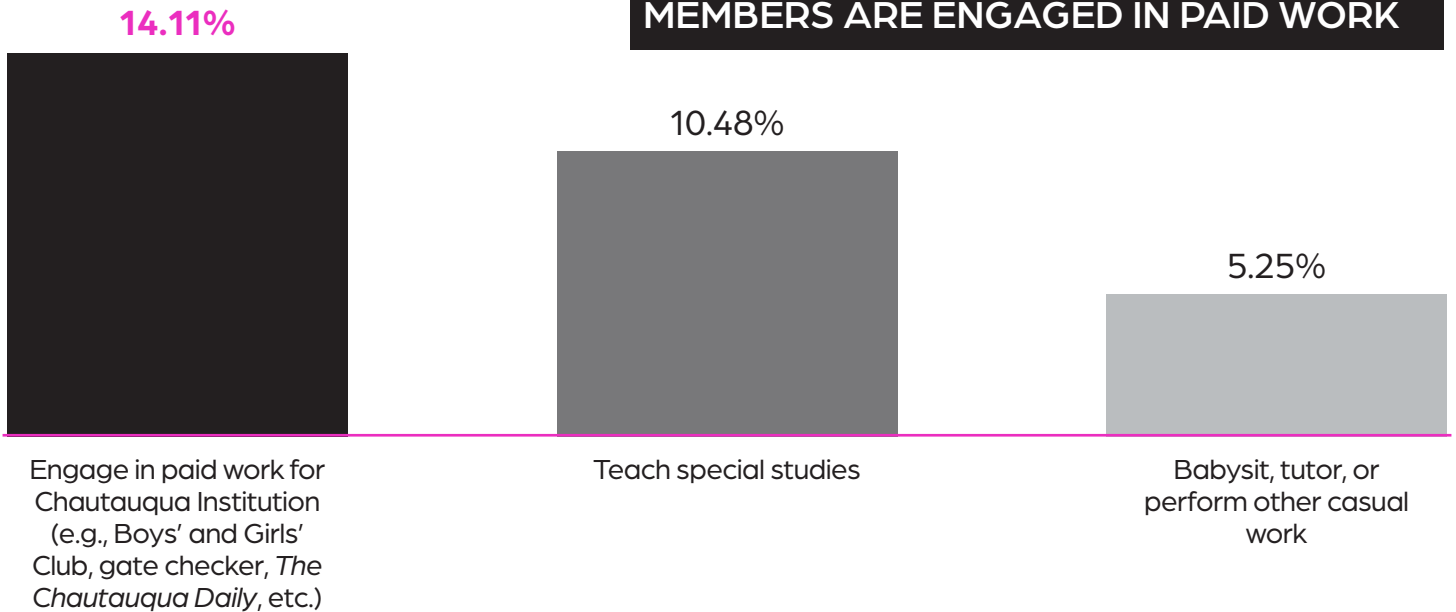


APPENDIX E: PROPERTY OWNER DEMOGRAPHICS

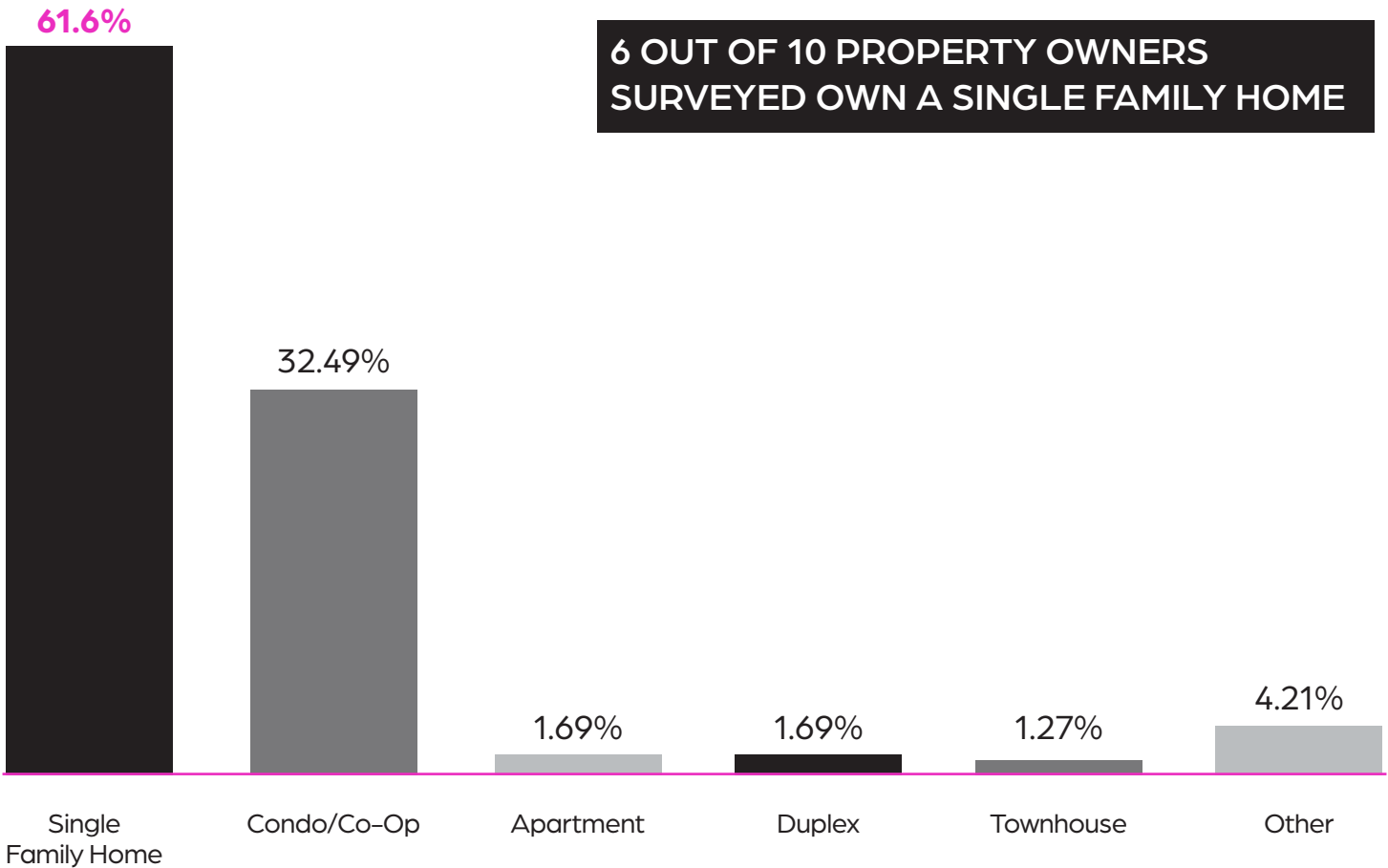
NEARLY 7 OUT OF 10 PROPERTY OWNERS ARE RETIRED



PROPERTY OWNERS AND FAMILY MEMBERS ARE ENGAGED IN PAID WORK



APPENDIX E: PROPERTY OWNER DEMOGRAPHICS



DURATION OF CHAUTAUQUA INSTITUTION HOME OWNERSHIP

Current Home

- 18.84 years on average of owning current home
- Shortest duration: 6 months
- Longest duration: 84 years

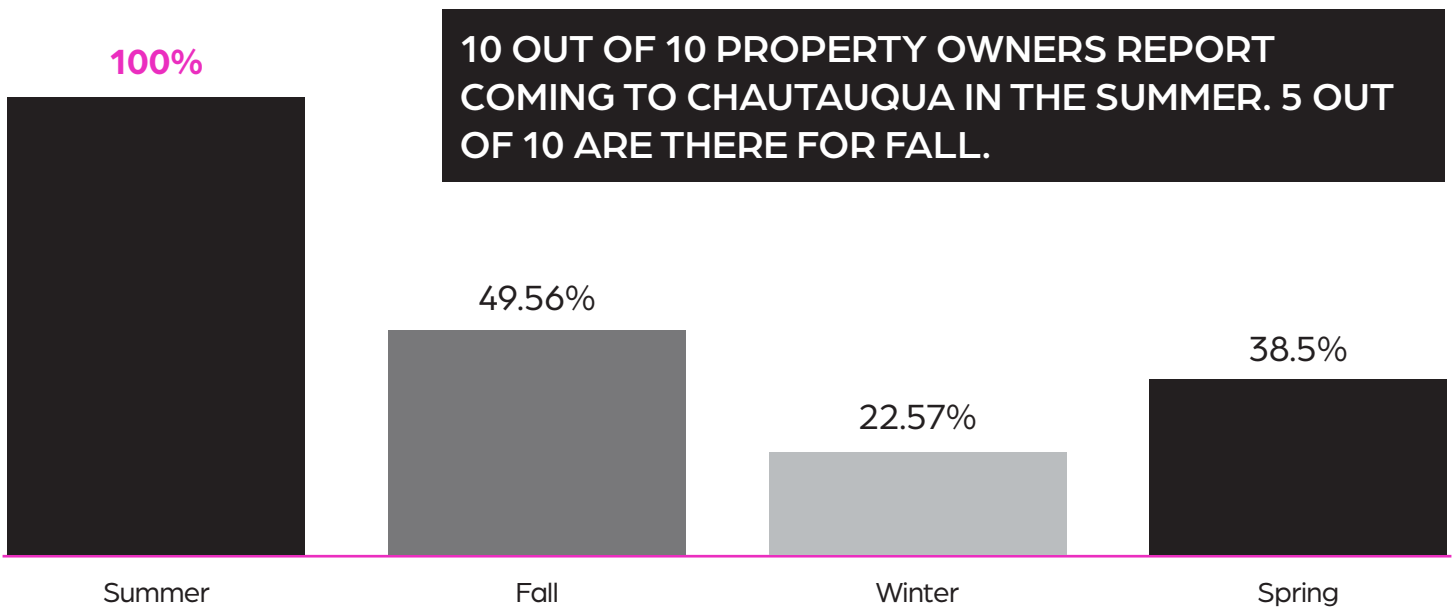
Family Has Owned a Home

- 30.47 years on average of family owning home
- Shortest duration: 6 months
- Longest duration: 150 years



APPENDIX E: PROPERTY OWNER DEMOGRAPHICS

9 OUT OF 10 PROPERTY OWNERS SURVEYED CATEGORIZE THEIR PROPERTY AS A VACATION HOME

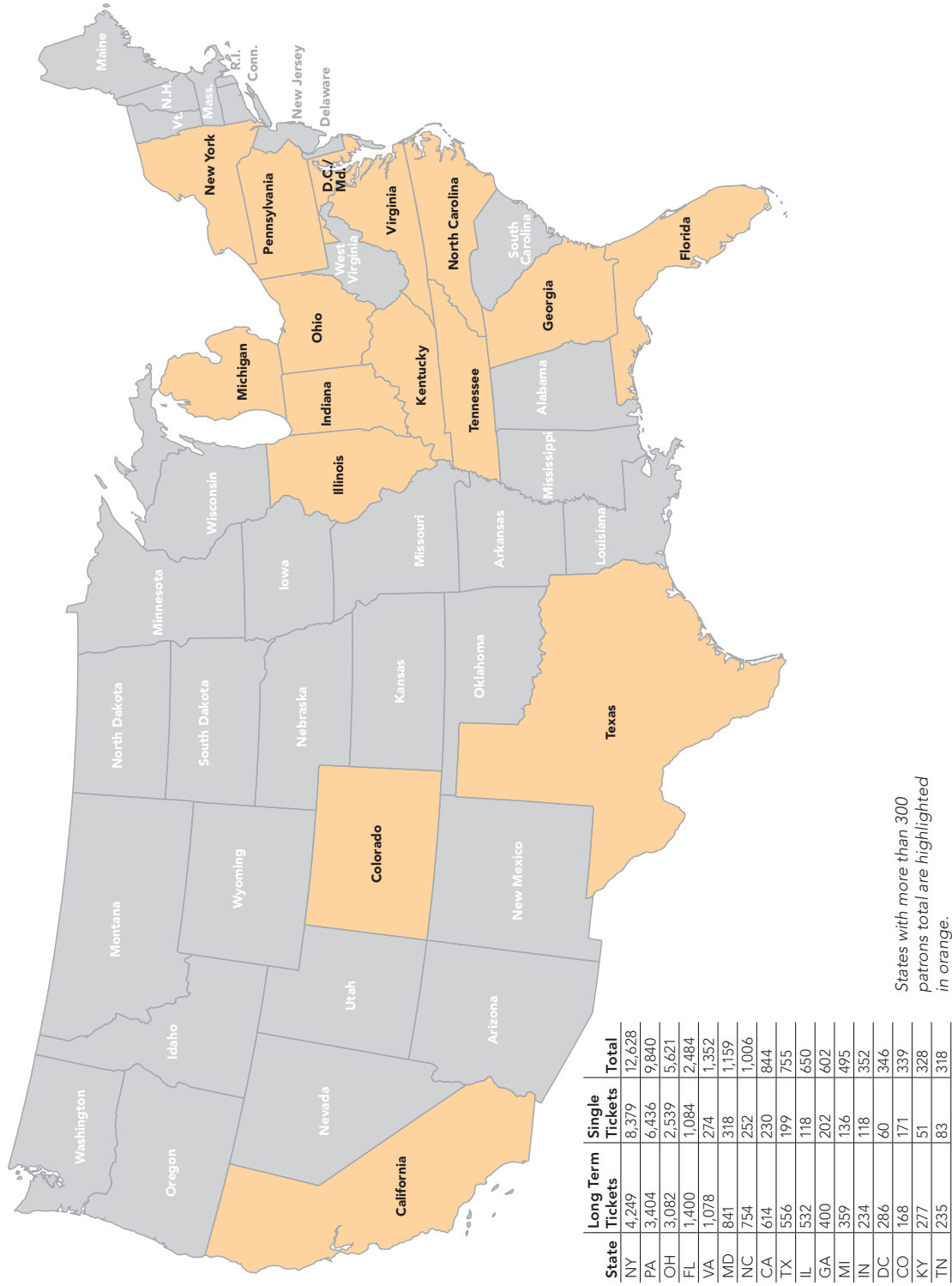


On average, property owners report spending 107 days each year on the grounds.



APPENDIX F: SERVICE MAPS

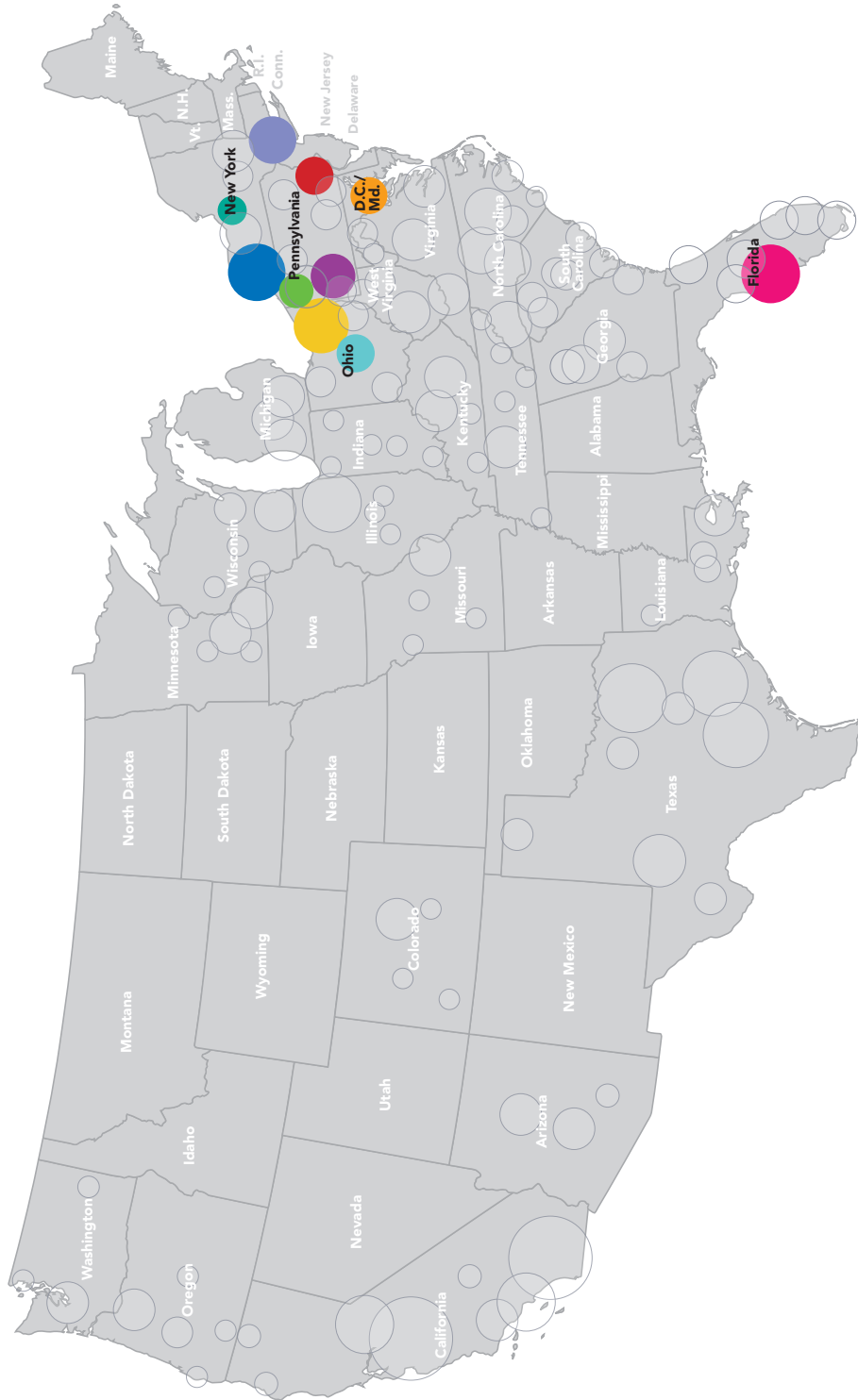
Ticket Sales by U.S. State





APPENDIX F: SERVICE MAPS

Ticket Sales by U.S. Region/City



The institution serves patrons from across the U.S.; however, the largest numbers of patrons come from the regions most proximate to Chautauqua, including: ● Buffalo, NY, ● Erie, PA, ● Cleveland-Akron, OH, and ● Pittsburgh, PA. These areas have 3,500–10,000 patrons.

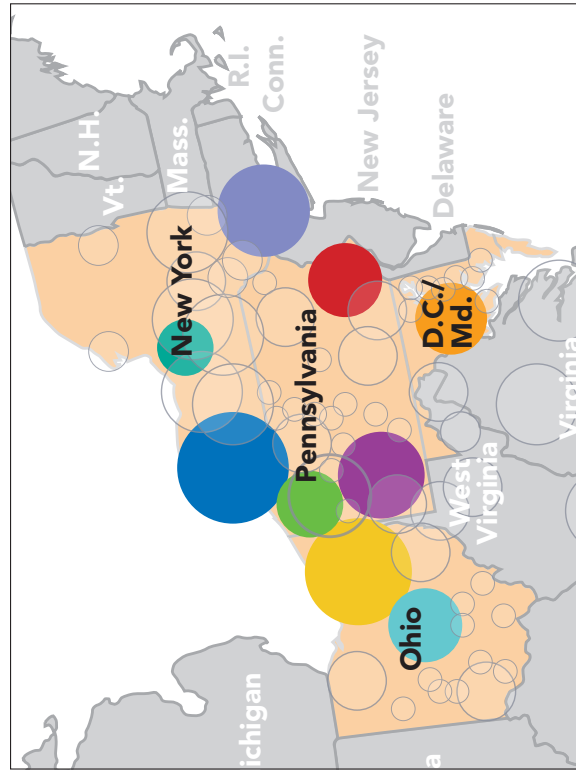
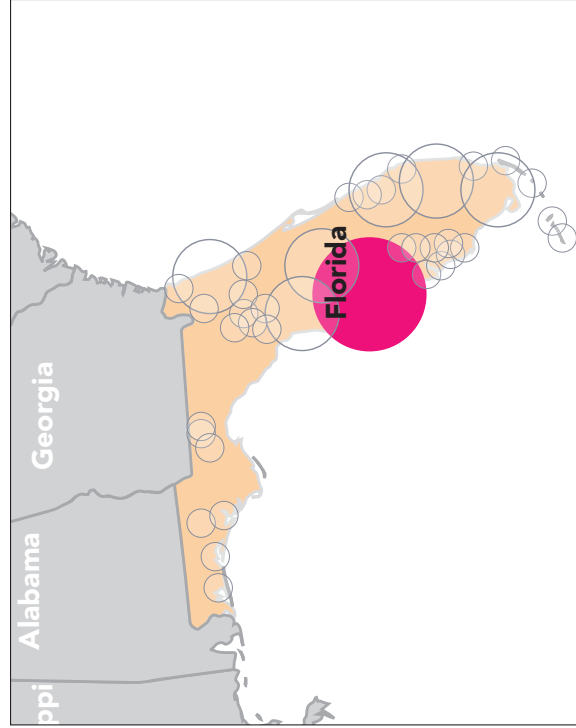
Significant numbers of patrons also come from: ● DC/Hagerstown MD region, ● New York, NY, ● Rochester, NY, ● Philadelphia, PA, ● Columbus, OH, and ● Tampa/St. Petersburg/Sarasota, FL. These areas have 650–3,499 patrons.

Cities/regions with more than 100–649 patrons are represented with a gray circle.



APPENDIX F: SERVICE MAPS

Detail of Ticket Sales by U.S. Region/City in the North East and Florida



Top 10 Cities by Ticket Sales

Region/City	Long Term Tickets	Single Tickets	Total
Buffalo	2,360	7,395	9,755
Erie	422	3,609	4,031
Cleveland-Akron (Canton), OH	1,948	2,059	4,007
Pittsburgh, PA	1,880	1,913	3,793
Washington, DC (Hagerstown, MD)	1,345	389	1,734
New York, NY	843	312	1,155
Rochester	604	534	1,138
Philadelphia, PA	602	291	893
Columbus, OH	487	226	713
Tampa-St. Petersburg (Sarasota)	351	329	680

