



St. Patrick's Day Impact Business Perception and Tax Revenue Analysis

Prepared for
The City of Savannah

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at Georgia Southern University

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Executive Summary

The Bureau of Business Research and Economic Development (BBRED), a unit of the Business Innovation Group at Georgia Southern University, is working with the City of Savannah to estimate the economic impact of the St. Patrick's Day Parade and Festival on the City of Savannah. The aim of this research is to provide local policymakers with an understanding of the cost-benefit impact of hosting the events associated with St. Patrick's Day. The events, held annually in March, include daytime events like the St. Patrick's Day Parade and evening events including live music performances across downtown. Both aspects play a significant role in attracting visitors to Savannah.

This report provides benchmarking information that compares the Savannah St. Patrick's Day Festival to three festivals hosted by other cities: *Memphis in May*, *Charleston's Spoleto USA Festival*, and *Chattanooga's Riverbend Festival*. Key differences that were found in these festivals included the use of numerous ticketed events, extended over a longer duration, formal organizing committees, and independent budgets for organization and promotion. From the perspectives of scale and demographics, the Chattanooga Riverbend Festival was most like Savannah's St. Patrick's Day and could serve as a useful benchmark for certain aspects of the St. Patrick's Day festival.

In general, events serve multiple purposes for the hosting community, including direct revenue generation, stimulation of future tourism, and socio-cultural benefits for area residents. Direct revenue generation is the most measurable of these benefits, as the host city can calculate increased tax revenues and can ascertain the impact on local businesses. The research team explored two different scenarios to ascertain the economic impact of St. Patrick's Day, for reasons which are discussed in detail in the Tax Analysis segment of this report.

For the City of Savannah, average annual monthly revenue in categories most impacted by St. Patrick's Day is estimated to be \$5.8 million. In scenario one this led to typical March revenues of \$6.4 million. In scenario two typical March revenues are \$5.9 million. By leveraging knowledge of seasonal characteristics in city revenue gained from figures for February and April, the research team estimated the additional March revenue that was attributable to the St. Patrick's Day events in scenario one is \$147,637 and scenario two is \$285,280. The impact on business revenues is less clear, with approximately half of businesses reporting that they earn additional revenues during the events, but the same number reporting increased operational, security, labor, and maintenance costs. The other half of respondents report either a neutral or negative impact on revenues. While the collective impact is slightly positive, it appears that, even though a few businesses see large revenue gains, most spend more to make more.

The relative ease with which revenues can be estimated makes it easy to overlook the other impacts that are, perhaps, equally important. Events bring people to an area who would not otherwise visit, and the team's research indicates more than 85 percent of tourists return to

areas they have already visited. This means that an event can have a secondary economic impact on a region, which is simultaneously substantial and difficult to quantify. This impact is reflected in the survey data, with 63 percent of survey participants estimating that the events generate return traffic to the area. Lastly, events provide socio-cultural benefits for the hosting community that are both tangible and intangible in nature. Among the tangible benefits are restaurants, hotels, and arts and entertainment infrastructure above and beyond those the domestic population can utilize. These make a community a more desirable place to live and can help attract both businesses and new residents into the region. The intangible benefits include increased civic pride, stronger relationships within the community due to volunteerism, and an increased awareness of the external perception of a community.

Given their complex impacts and non-economic benefits, individual events should not be viewed independently but rather as part of an intertwined portfolio of events, each serving overlapping segments of the population and economy, and each doing its part to extend the tourist season and enhance the perceived image of the community among locals and potential tourists alike. The tourism market is highly competitive in nature, and cities compete to attract tourists and retain local disposable income across a broad range of demographics and interests. Events tend to draw a different set of stakeholders than historic, cultural, or architectural features attract and, thus, extend the scope of a region's market. No event can be all things to all people. Each will have stakeholders who benefit and those who, perhaps, face some loss. It is critical to evaluate the needs of all stakeholders when reviewing an event portfolio so that the benefits associated with one event offset the potential losses from another.

As discussed in more depth within this report, hallmark events such as Savannah's St. Patrick's Day parade and festival tend to cost more than can be recaptured through direct revenue alone. In addition to the non-economic considerations, it is important to consider both the national media attention and the word-of-mouth advertising that large events contribute that cannot be duplicated by smaller events. The majority of survey participants feel that the St. Patrick's Day Parade and the media attention related to it benefit the image of Savannah. Perception of the festival and its media coverage is less favorable, but still positive. While local businesses are less supportive of the extended festival, a certain critical mass is required to gain both media attention and public awareness. Events like the St. Patrick's Day festival have value beyond their direct economic impacts.

Introduction

Developing a strong tourism industry in any community is a major undertaking requiring many years of on-going effort. These efforts require buy-in from both the public and private sectors. The public sector must ensure that tourism infrastructure is developed in a timely way to handle visitors. Examples of this type of infrastructure are roads with good signage, up to date area maps, promoting the community, managing events, and so on. In contrast, the private sector must provide much of the other core infrastructure to serve visitor needs, including hotels, restaurants, community tours, and the like. A strong tourism industry can manage each of these factors well and ensure the development of formal or informal public/private partnerships to support growth in this segment of a regional economy.

Having a vibrant tourism industry also creates added value for residents within the community. Tourism provides both high and low skill employment. This contributes to expanding gross regional product. The impact of the tourism industry goes beyond purely economic benefits. Local residents attend the festivals, eat in the restaurants, and attend other events that bring in visitors. Having access to these events, restaurants, and the public/private spaces increases the noneconomic well-being of residents living in a host community. The presence of a strong level of amenities can make a community more attractive for new businesses and people looking to relocate.

In the Savannah area, the tourism sector is a major segment of the economy. One of the factors that makes this local economic sector successful is the willingness of participants to adjust to meet market demand. As part of these efforts, both public and private organizations continually examine the market to determine potentially advantageous investments and policy changes. From a public sector perspective, when a local government invests monetary resources in support of an event, it is important to estimate the economic or fiscal value derived from these expenditures. Funds spent to support community events may be linked to both tourists and local residents. Analysts typically explain the value of tourism in net direct expenditures, which is visitor spending minus resident spending at a specific event. This framework looks to account for the sources, origins, and destinations of expenditures in addition to the specific reason that expenditure occurred.¹ When conducting a fiscal analysis it is important to acknowledge that events that support large numbers of visitors will impact the revenue being generated and the services being provided.

The Bureau of Business Research and Economic Development, a member of the Business Innovation Group at Georgia Southern University, is working with the City of Savannah to estimate the fiscal impact of the St. Patrick's Day Festival on the City of Savannah. The event is hosted in downtown Savannah and typically runs on March 16, 17, and 18. It includes both daytime events, highlighted by the parade on St. Patrick's Day, and evening events, highlighted

¹ Tyrrell and Johnson. A Framework for Assessing Direct Economic Impacts of Tourist Events. 2012, retrieved from https://www.researchgate.net/publication/249700599_A_Framework_for_Assessing_Direct_Economic_Impacts_of_Tourist_Events_Distinguishing_Origins_Destinations_and_Causes_of_Expenditures on June 15, 2017.

by several live music performances across downtown. Both the daytime and evening events draw large numbers of people to the Savannah area in general and downtown Savannah specifically.

This report will begin by discussing the general economic value linked to hosting large events. Next, the research team will discuss several events that share common characteristics with the Savannah St. Patrick's Day Festival. The goal will be to highlight how these host communities benefit from their events and to provide external benchmarks for the St. Patrick's Day Festival. Third, the research team will discuss the results of a survey of downtown businesses conducted in August 2017. These responses will highlight how local businesses view both the parade and the night-time events. Finally, the research team will discuss their analysis of tax receipts that are collected by month for the City of Savannah. This information will be used to estimate the fiscal impact of hosting the St. Patrick's Day event from a revenue standpoint.

This fiscal impact study is designed to be a first look at the monetary impact of this event. The study began after the close of the 2017 event and concluded before the start of the 2018 event. Therefore, no interview or other information was collected during the event from participants. This means that the findings contained in this report focus primarily on the businesses and public agencies that supply amenities and services related to the event.

Literature Review

Savannah has a beauty and charm which, combined with a well-developed tourism market place, make it a unique destination. This is particularly true in the month of March when the weather is at its best—especially by comparison to the home of many potential visitors—and when the bloom of azaleas and other flowers create an unmatched display across the city's historic squares and neighborhoods. The City of Savannah and the associated metropolitan area contain a diverse mix of industry and amenities that support both business development and cultural richness. Every year, nearly 13.7 million visitors are attracted to the Savannah area and typically stay 2.7 days.² In addition, between 2011 and 2015, tourist expenditures increased by 32 percent from \$1,117.03 billion to \$1,471.30 billion in Chatham County, home to the City of Savannah. These expenditures supported the addition of 1,650 new jobs over this time frame, which led to a total employment impact of 13,180 jobs in 2015.³

This overall activity has fueled the development of the tourism cluster. Clusters are concentrations, or groupings of industries, as defined by the North American Industry Classification System (NAICS) code, that are more prevalent in a local or regional economy than is typical in the country. Strong clusters are those that have become an important sector in the

² Brown, Caila. *Savannah Business Journal*, retrieved from <https://www.savannahbusinessjournal.com/news-categories/hospitality-tourism/5923-georgia-welcomed-more-than-100-million-visitors-in-2015,-up-3-7-percent-savannah-tourism-grows-2-2-percent.html> on June 15, 2017.

³ 2015 Travel Economic Impact On Georgia State, Counties and Regions. Prepared by U.S. Travel Association, Prepared from the Georgia Department of Labor. Retrieved from <http://www.marketgeorgia.org/resources>. On June 15, 2017

region and can be identified as a potential source of economic growth. For Savannah, this points to the continued growth in the tourism/hospitality cluster, which is among the largest employers in Chatham County, rating just behind aerospace/defense and water transport. Ranked against the other 3,221 counties in the United States, Chatham County is a leading employer in the tourism/hospitality industry; Table 1 displays this information.

Table 1: Chatham County Employment in Tourism Industry Compared to All Other U.S. Counties in 2014

Industrial Cluster Sectors	Rank in United States
Accommodations and Related Services	85
Tourism Related Services	93
Cultural and Educational Entertainment	103
Other Tourism Attraction	192
Amusement Parks and Arcades	375
Spectator Sports	352
Gambling Facilities	643

Sources: U.S. Cluster Mapping, Hospitality and Tourism Cluster

Within this cluster, economic benefits in Savannah are concentrated in several sectors, including retail; art, entertainment, and recreation; and accommodation and food services.

The St. Patrick's Day Festival is the most well-known event hosted by the Savannah community. The St. Patrick's Day Parade has been celebrated in the streets of Savannah for 190 years. The event is the third largest celebration of Irish heritage in the United States, and marks the unofficial start to the tourist season in Savannah. It is followed by other events in March, which include the Savannah Stopover, the Savannah Music Festival, and the Tour of Homes and Gardens. Combining these events with pleasant

spring weather makes March a very busy month for visitors and residents alike.

The research team looked for information that could highlight the primary reasons why communities choose to support large high-profile events, similar to the St. Patrick's Day Festival in Savannah. In general, cities and towns are working toward reviving their images and increasing their competitiveness as tourist destinations by marketing their unique resources, attractions, amenities, and services, which may include cultural and leisure activities. Their marketing efforts may be combined with event tourism. "Event tourism" is a fast growing industry that communities are using to increase the number of visitors to the local area. These events help to drive visitors to the host community, and the tourism industry has become a strong stakeholder group in the success of these events.

From an event tourism perspective, events should not be viewed in isolation—as single, one-off events—but rather on how their values might be enhanced by playing a specific role in a strategically developed portfolio of events,⁴ which is valued both for the media attention it can generate, and by the portfolio's capacity to build a locality's brand for tourists and residents alike. In this model, a portfolio is based on the functionality of different events (i.e., hallmark, regional, and local events) and the premise that each can achieve certain economic and tourism

⁴ Ziakas and Costa. The Use of an Event Portfolio in Regional Community and Tourism Development. *Journal of Sports and Tourism*, 2011, retrieved from <http://www.tandfonline.com/doi/abs/10.1080/14775085.2011.568091>, on June 15, 2017.

goals. Various measures of an event's value must be used, such as growth potential, market share, quality, image enhancement, community support, economic benefits, sustainability, etc. In short, a portfolio approach can substantially enrich a destination's tourism product, enhance its image, and redress seasonality by offering events of different types and scales throughout the year, on-season and off-season, aimed both at attracting visitors and meeting the needs of locals.

Under this approach, events have value above revenue generation. This concept has led researchers to attempt to evaluate events by using the Triple Bottom Line⁵ approach, borrowed from accounting and finance theory. This incorporates the social, economic, and environmental aspects of activities into one framework. While different socio-cultural impacts have been noted, both positive and negative, a common thread among all the socio-cultural research leads back to the idea that events may strengthen regional traditions and values, improve community cohesion through extensive volunteer efforts, and increase local interest and participation. Other researchers refer to increased local pride and community spirit and an increased awareness of non-local perceptions.

Events in a locality's portfolio, whether large or small, are potentially important motivators of tourism and may form a fundamental component of the destination's tourism development.⁶ In Savannah, this combined model has been embraced by community and business leaders. The Savannah area remains far ahead of the national average for special interest tourism for its historical sites, cultural activities, and exceptional culinary experiences. In general, it appears that Savannah's current portfolio of events has reduced the variability of demand over the year and extended the length of the tourist season, in addition to reaching different types of visitors from different market segments. Savannah has benefitted from this smoothing out effect because demand is remaining more constant over the year than it was ten years ago and, currently, Savannah really only has two slow months—August and December.⁷

Events also help to create an image, or brand equity, for their host cities. Communities seek to build brand equity, which is an increase in positive consumer perception and leads consumers to pay more for the same level of service. In practical terms, communities are working to increase awareness, perceived quality, and positive associations related to their brands by hosting the events in their portfolios.⁸ As part of this process, events that occur regularly in the same location may gradually become closely associated with the identity of the place in which

⁵ Grosbois, First Name or Initials. Assessing the Socio-Cultural Impact of Special Events. *Journal of Tourism Challenges and Trends*, retrieved from <https://www.questia.com/library/journal/1G1-228909106/assessing-the-socio-cultural-impact-of-special-events>, on June 13, 2017.

⁶ Cibinskiene, First Name or Initials. Impact Evaluation of Events as Factors of City Tourism Competitiveness. 2012. Retrieved from <http://ecomian.ktu.lt/index.php/Ekv/article/view/2997/2074>, on June 13, 2017.

⁷ Interview with Michael Owens, President/CEO, Tourism Leadership Council.

⁸ Lucia, First Name or Initials. Economic Performance Measurement Systems for Event Planning and Investment Decision Making. 2013, retrieved from https://www.researchgate.net/publication/257087380_Economic_performance_measurement_systems_for_event_planning_and_investment_decision_making, on June 20, 2017.

they are held, and that becomes a driver for image-making and branding.⁹ For example, New Orleans, Louisiana hosts the largest Mardi Gras celebration in the United States as part of a portfolio that includes events in the musical space, a downtown district famous for Cajun dining, major league sports events, everyday access to Casinos, business conventions, and so on. In this portfolio, Mardi Gras has become an iconic aspect of New Orleans and is the first image that comes to mind for many first time visitors to this community. Thus, positive positioning or re-positioning can enhance the prestige of a city hosting an event and increase demand for local goods and services.¹⁰ This is beneficial for stakeholders of the event and the local economy as a whole. In the context of city tourism, planned events act as motivators to attract visitors, which strengthens the city's competitiveness. For example, business convention planners choose New Orleans, in part, because of the other entertainment-related aspects of the city's brand. It is important for destinations to decide both what they want from events and how to value them using the social, economic, and environmental factors as criteria. Several non-economic aspects of event value include image enhancement, community support, appropriateness when compared to the other events held regularly, and quality of the execution of the event.

Comparison Events

The research team at BBRED selected three events to compare to the St. Patrick's Day Festival. These events are the *Memphis in May International Festival* in Memphis, Tennessee; the *Spoleto Festival*, in Charleston, South Carolina; and the *Riverbend Festival* in Chattanooga, Tennessee. Each of these events was selected because it is an iconic event in the community. For comparison purposes, these events also provide a high end for what is possible rather than a straight comparison of what is likely. This means that, because these events are longer in duration, it is reasonable to have an expectation of a large economic and fiscal impact. In addition, local tax rates and collection processes vary widely from state to state. Therefore, the three day festival held in a state with high or low levels of local tax will report a vastly different revenue impact. Using this as a guide, the research team focused more on the status of the event and less on the duration or type of crowd. Based on this information, it is likely that the economic impact of the St. Patrick's Day Festival may be less significant than is the case for these benchmarks.

Memphis in May International Festival

For the past 40 years, the Memphis in May International Festival has been a month-long event held in Memphis, Tennessee each May. In 2016, more than 265,000 people attended the festival. The festival encompasses some of the largest events held in Memphis, including the Beale Street Music Festival, The World Championship Barbeque Cooking Contest, the Great American River Run, and 901Fest. Additionally, every year the festival honors a selected

⁹ Ibid

¹⁰ Getz. Event tourism: Definition, evolution, and research. 2008, retrieved from <http://www.sciencedirect.com/science/article/pii/S0261517707001719>, on June 15, 2017

country, which gives the festival an international perspective while also cultivating business relations with the honored country.

An analysis of the 2016 festival by Younger Associates¹¹ provided policymakers with a better understanding of the job, wage, and local tax impacts generated by the Memphis in May organization and festival. Overall, the 2016 annual economic impact from the festival brought more than \$88 million to the area's economy. This figure represents the year-round operations to produce and promote the festival, capital expenditures, and out-of-county visitor spending. Additionally, local tax revenues for the city and county generated by the festival were projected to be \$2.8 million. Local taxes are generated by employees spending wages in the local economy, vendor spending, and, most significantly, visitor spending. The event is organized by the *Memphis in May* organization, with a full-time professional staff of 14 people and an operating budget of \$8.5 million dollars. According to the report, the festival creates a net positive impact on the local economy.¹²

Spoletto Festival USA

Spoletto Festival USA is a 17-day arts and cultural festival held in Charleston, South Carolina. The annual festival presents more than 500 performing, literary, and visual arts events—many of which are ticketed. Now approaching its 39th season, the Spoleto Festival is known for its dedication to young artists, contemporary works, enthusiasm for recognizing masters in their fields, and commitment to all performing arts. The festival was founded in 1977 by Pulitzer Prize-winning composer Gian Carlo Menotti, Christopher Keene, and others who sought to create an American replica of the annual *Festival of Two Worlds* in Spoleto, Italy.

Spoletto Festival USA has an annual attendance of approximately 70,000. The estimated total annual economic impact is more than \$55 million, \$44 million coming directly from visitors.¹³ The festival supports the equivalent of 948 jobs and \$20.4 million in local household income. Since its inception, the Spoleto Festival has brought more than \$1.2 billion to the region.

Spoletto Festival USA attendees from outside of South Carolina spend more than \$1,500 during their stay, which is twice the national average spent by arts and cultural tourists. Most of this spending can be accredited to demographic characteristics of their audiences, whom the organization found to be an average of 54 years of age or older, college educated, married, and with household incomes of \$130,000 or more.

Spoletto Festival USA is a leader in the local arts community, which plays a key role in preserving historic landmarks and invests in the infrastructure of Charleston and civic resources for the

¹¹ Meek, Andy. Study: Memphis in May Brings \$88M Economic Impact. *Daily News* 2017, retrieved from <https://www.memphisdailynews.com/news/2016/aug/31/study-memphis-in-may-brings-88m-economic-impact/>, on June 20, 2017.

¹² Ibid.

¹³ Moore School of Business, Division of Research, 2002, retrieved from <http://spoletousa.org/wp-content/uploads/2012/01/Sponsor-Information-Packet.pdf>, on June 15, 2017.

community. The organization is committed to benefitting the community through its public outreach programs.

It is interesting to note that Spoleto suffered high turnover in managers and was generally unprofitable from its inception in 1976 until the re-appointment of its original general manager, Nigel Redden, in 1995. At the time Redden resumed management, the event was more than \$1 million in debt. Today, the festival is professionally organized, with a full-time staff of 20 people and seasonal help of more than 600 employees.¹⁴ The operating budget for the festival is approximately \$6.5 million, with more than half of that coming from corporate sponsorships, grants, and fundraising efforts.

Riverbend Festival

The *Riverbend Festival* originated in 1982 and offers an eight day lineup every June of approximately 100 national and local bands on five stages on the riverfront in Chattanooga, Tennessee. Headline performers are featured on the Coca-Cola stage, which is a barge that has been converted into a full concert stage at Ross's Landing on the Tennessee River. The barge floats just off-shore against a large collection of amphitheater seats built into the hillside at the water's edge. Major companies sponsor other stages throughout the festival. Over its 35 year history, the event has grown to be the hallmark event for Chattanooga and ranks as one of the top ten festivals in the United States. The festival also includes an opportunity for local artisans to sell their wares, and vendor booth spaces tend to sell out as soon as they become available each season.

With approximately 350,000 attendees, the festival generated approximately \$26 million dollars in direct impact in 2016,¹⁵ with 45 percent spent at the festival itself, and the rest spent on outside venues and attractions. The festival is professionally managed by Friends of the Festival, with a full time staff of 11 and an operating budget of approximately \$2.5 million in 2010 (more recent data was not available).¹⁶ No information was available regarding the indirect or induced effects or on the tax revenues generated from the event. Like the Spoleto Festival, Riverbend was significantly in debt when current management took over, and, like Spoleto, the management raised funds from donors and corporate sponsors to continue operations.

¹⁴ Sellers, Edward. Spoleto Festival Owes Its Existence to NEA. *The Post and Courier*, 2017, retrieved from http://www.postandcourier.com/opinion/commentary/spoleto-festival-owes-its-existence-to-nea/article_4f6f8cce-0999-11e7-add1-97333449192c.html, on June 20, 2017.

¹⁵ Riverbend 2015: Brief Report, UT Chattanooga, Friends of the Festival, 2016, retrieved from <https://www.utc.edu/health-human-performance/pdfs/riverbendbrief.pdf>, on June 15, 2017.

¹⁶ 2010 Financial Report for Friends of the Festival, retrieved from http://www.timesfreepress.com/news/riverbend2011/story/2011/jun/12/riverbend-35-million-business/51734/#document_81, on October 4, 2017.

Local restaurants note mixed effects, similar to those in Savannah.¹⁷ While blocked roads and crowding keep some people away, restaurateurs generally feel that it is at worst a wash and, at best, attracts people who come back on other occasions. Several business people noted that the principal problem with the event is that it has not evolved to accommodate a revitalized downtown—i.e., they face similar logistical issues with parking and restrooms as seen in Savannah.

Savannah's St. Patrick's Day by Comparison

In order to make a city more competitive in terms of branding and the name recognition needed to increase tourist traffic, events have to do two things. One would be to attract a large number of visitors who would not otherwise visit. The other, which can be driven in part by the first, is to attract positive media attention, ideally on a national scale. St. Patrick's Day is Savannah's hallmark event with approximately 15,000 people attending the parade and upwards of 70,000 buying wristbands for the festival. In 2016, the Savannah Waterfront Association speculated that good weather could draw record crowds with as many as 500,000 people visiting River Street during the event. While analyses of the direct, indirect, and induced economic impact of the comparison events has been cited above, such an analysis was beyond the scope of this research project.

Table 2: Tourist Infrastructure for Savannah and Comparable Event Counts

	Savannah, GA Metro Area	Memphis, TN MS-AR Metro Area	Charleston - North Charleston, SC Metro Area	Chattanooga TN-GA Metro Area
Accommodations and Food Services NAICS 72	1,086	2,289	1,764	1,111
Arts, Entertainment and Recreation NAICS 71	132	277	302	169

Source: U.S. Census Bureau, 2015 County Business Patterns

As shown in Table 2, Savannah and Chattanooga are quite similar in the amenities they offer. They are well matched in terms of per capita income and population as well, making the *Riverbend Festival* perhaps the most directly comparable event. Charleston is not only larger, it has also made a more significant investment into fine arts and culture and boasts a higher per capita income, making the Spoleto Festival less directly comparable though it does offer some quite interesting lessons in management and community involvement. Memphis is the least similar to Savannah in terms of infrastructure and population, but per capita incomes are

¹⁷ Morrison, Chloe. Riverbend Restaurant Effect: A Blessing or a Curse? Nooga.com 2016, retrieved from <http://nooga.com/166776/riverbend-restaurant-effect-a-blessing-or-a-curse/>, on September 18, 2017.

closest and *Memphis in May* offers interesting lessons in branding and coordination of disparate events into a cohesive portfolio.

A competitive advantage enjoyed by the compared events is that they are longer, with the shortest among them being the *Riverbend Festival* at eight days and the longest being *Memphis in May*, spread over an entire month. Spreading events over a longer time period eases infrastructure concerns and allows better service of multiple stakeholders. One strategy to capitalize on this idea is to develop, or emphasize, peripheral events related to the larger, core events. St. Patrick's Day offers multiple opportunities to enhance peripheral events that are not currently being fully exploited. The Festival may remain as a one-week celebration, and serves a distinct audience in doing so, but more could be made of the various dance and music events leading up to the Festival itself. Doing so may draw in additional, more family-friendly, business during the week before the height of the festival and help offset the concerns of the businesses that lose revenue.

The other common denominator that provides the compared events with a competitive advantage relative to St. Patrick's Day is that each of them is professionally managed with a staff size ranging from 11 for the *Riverbend Festival* to 20 for the *Spoletto Festival*, not including seasonal help at the time of the festival. Each also raises significant funds from grants, private donors, and corporate sponsors, and each has a large operating budget, ranging from \$2.5 million for the *Riverbend Festival* (in 2010) to \$8.5 million for *Memphis in May*. Without exception, operating budgets exceeded tax revenues significantly. In contrast, St. Patrick's Day is operated by several disparate organizations managing the parade and the evening events. Each of these organizations, along with the staff at the City of Savannah, have made sizeable contributions to the success of this event. This grass roots support for the event is a credit to this community and should be recognized as such. The business community of Savannah has done more, with less, than any of its competitors. As the stakeholder groups work to manage the growing and changing scope of this event, they should continue to examine how this event impacts their operations before, during, and after the event; creating an organizational entity to facilitate this consideration may prove beneficial.

Downtown Business Survey Findings

This section contains an analysis of the data collected from a survey of Savannah's downtown businesses. Among those who responded to the survey, 81 percent work downtown, 54 percent are involved directly in the tourist industry (hotel, bar, restaurant, or tour) and another 25 work in retail. Sixty-four (64) percent live in Savannah, and another 26 percent live within Chatham County. Finally, both genders are well represented, with 45 percent of respondents being male, and 48 percent female.

The questionnaire focused on both the non-monetary and fiscal impact of both the parade and festival on businesses. By looking at both factors, the research team was trying to holistically understand the community perceptions of the impact of this event. St. Patrick's Day is a

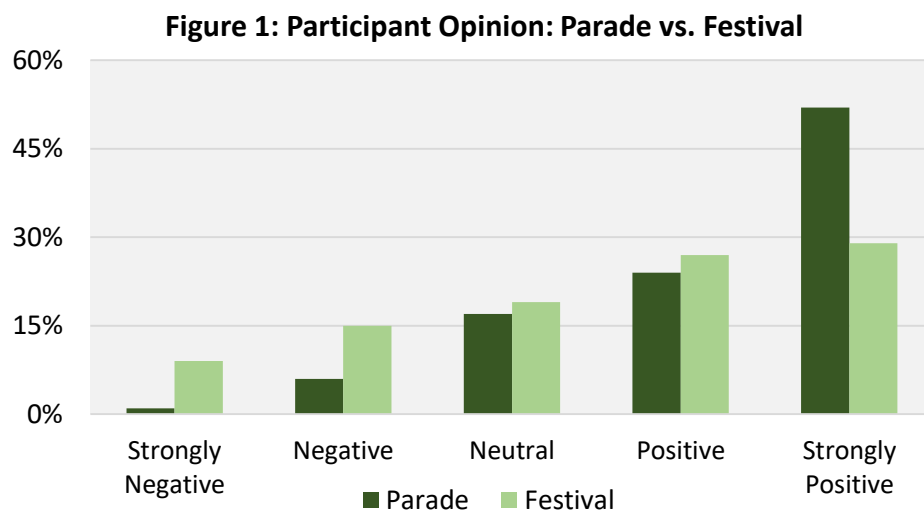
signature event for Savannah; therefore, the team believes that businesses would be readily able to identify both types of impacts on their operations.

A link to the online survey was sent to organization members, via email, by leaders of The Savannah Waterfront Association, City Market Partners, and Savannah Downtown Business Association. The survey link was active from Wednesday, August 22 through Friday, September 5, 2017; 124 usable and 89 fully complete responses were collected. By collecting data well after the close of the 2017 festival and well before the opening of the 2018 event, the research team likely collected responses that are less biased by any one specific stress experienced in preparation and execution of business activities surrounding the festival.

The costs/consequences of the previous event have somewhat faded, and the anticipation/apprehension for the next event has not fully begun. It is possible, if the timing were closer to the event, the overall responses could be more positive or negative. While only the most impactful findings are discussed in this section, the research team did include both a complete questionnaire and the responses to these questions in Appendix A. This section starts with an examination of the perceived non-economic benefits and concludes with analysis of the perceived financial benefits from a business standpoint.

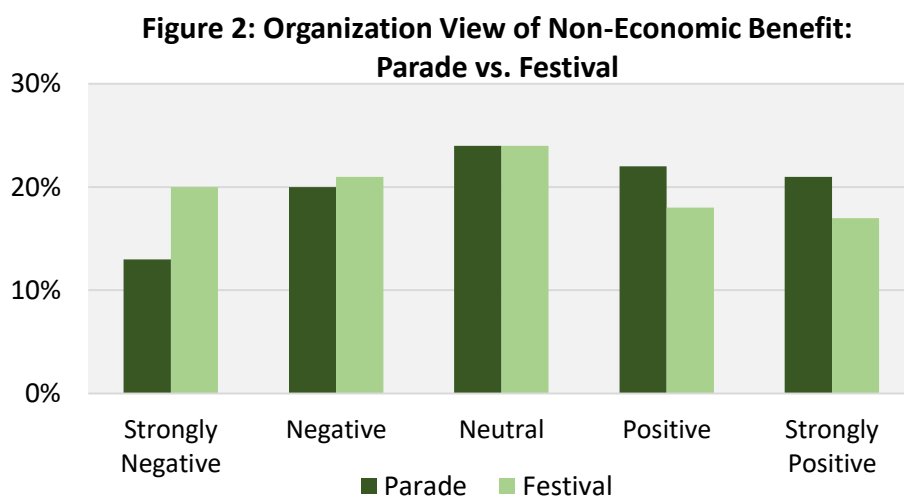
Noneconomic Benefits of the Parade and Festival

The research team asked for participants' views of both the St. Patrick's Day Parade and the extended St. Patrick's Day Festival. While this was important because of the significant differences between these two aspects of the festival, the question was intended to gauge respondent attitudes toward the festival as a whole, rather than focusing on specific aspects they may or may not like. The questions asked were, "What is your opinion regarding the St. Patrick's Day Parade?" and "What is your opinion regarding the extended St. Patrick's Day Festival?" The responses collected from the participants are displayed in Figure 1.



As shown in Figure 1, the majority of responses to each question indicate that both the parade and the festival are viewed positively, with 76 percent of respondents having either a positive or strongly positive opinion of the parade, and 56 percent having either a positive or strongly positive opinion of the festival. Clearly, support is significantly higher for the parade. This is reinforced by the fact that negative or strongly negative feelings are significantly higher for the festival (24%) than for the parade, (7%).

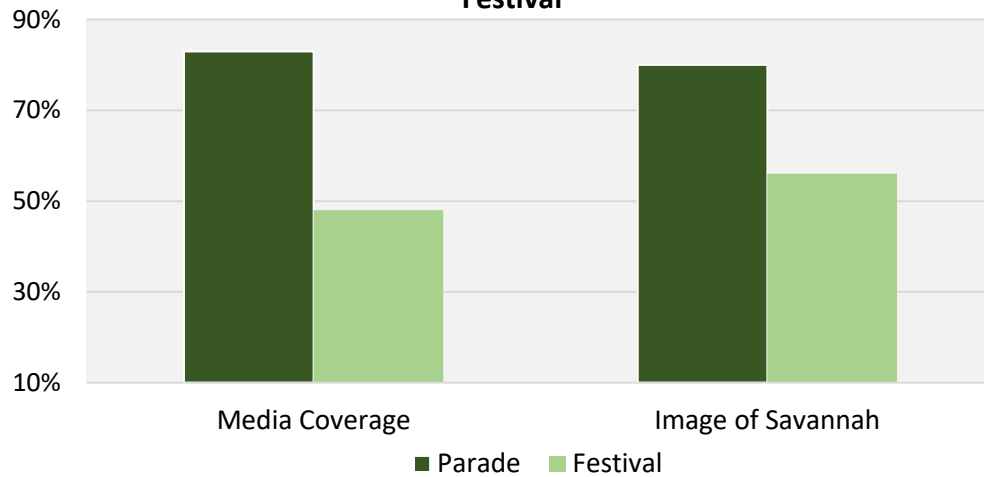
Next, BBRED gauged participants' attitudes about the non-economic benefit of the parade and festival by asking them to respond to the following statements: "The organization I represent (as employee or owner) benefits from the St. Patrick's Day Parade (St. Patrick's Day Festival) in non-economic ways." Their responses are displayed in Figure 2.



Perceptions were mixed regarding non-economic benefits of the parade, with 43 percent holding a positive or strongly positive view and 33 percent holding a negative or strongly negative view. The festival is somewhat more polarizing, with 35 percent holding a positive or strongly positive view and 41 percent holding a negative or strongly negative view. This ambivalence toward the festival is borne out by the comments ranging from, "Great for drunks and people who want to pretend to be Irish. Awful for business," and "It's a trashy non-shopping crowd that comes and messes up our beautiful city." While the majority of comments about the festival were negative, some expressed wholehearted support such as, "The festival is a vital part of our budget each year."

To further examine the non-economic benefits, the team asked participants for their views of media coverage and community-level image changes linked to these events. The prompts posted were "Media coverage of the extended St. Patrick's Day Festival (Parade) benefits the image of Savannah in the region and country," and "The extended St. Patrick's Day Festival (Parade) benefits the image of Savannah in the region and country." The responses were overwhelmingly positive for the parade. The response distribution is displayed in Figure 3.

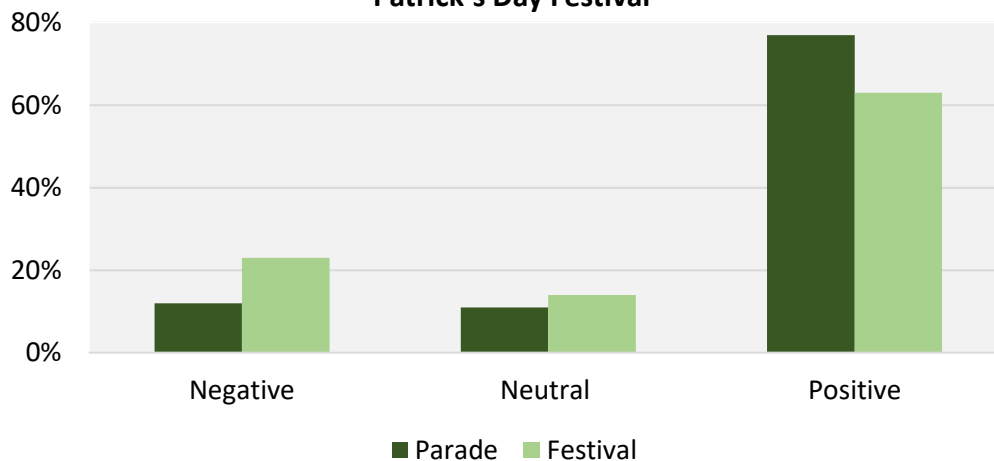
Figure 3: Positive View of Media and Image: Parade vs. Festival



From the perspective of the business owners and managers included in this sample, it is clear that the parade is viewed as having a more positive impact on media and the image of Savannah. The business community in this sample still has a somewhat positive view of the festival with 48 percent viewing media coverage as positive and 56 percent seeing the event as enhancing the image of Savannah. Perhaps surprisingly, despite the inconveniences of hosting this event, many businesses still see media and image benefits to the City of Savannah as arising from hosting this event. The value generated in this case is not merely financial but also reputational for the City of Savannah.

The research team asked for perceptions of visitor likeliness to return to Savannah in the future. The question asked was: “First time visitors to Savannah who come to watch (participate in) the *St. Patrick's Day Parade (Festival)* will likely return to visit the city at other times.” Displayed in Figure 4 are the findings for this prompt.

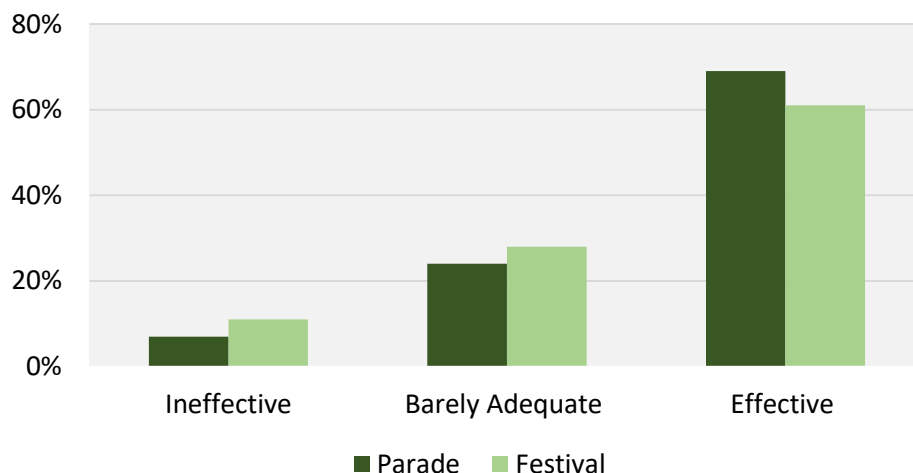
Figure 4: First Time Visitors Return to Savannah After the St. Patrick's Day Festival



By a wide margin, participants feel that first time visitors will return to Savannah. This view is likely a mix of optimism and verifiable trends. Based on the research team’s discussion with the City of Savannah, many of the St. Patrick’s Day week visitors to Savannah are coming from the Atlanta/Macon area. Savannah has a strong regional draw for travelers from these areas for both business and leisure visitors. Based on these findings, it is possible that many visitors’ first trip to Savannah is for events related to St. Patrick’s Day and as the visitors’ needs/interests change it is likely that many of these visitors could be returning. Similarly, many university students on Spring Break may participate in St. Patrick’s Day festivities and return to Savannah at a later stage in life for other events or amenities.

BBRED also asked about the operational side of the parade and festival. First, the team asked about security for both events. Respondents were asked to rate security efforts on a scale ranging from ineffective at the low end to effective at the high end, using the statement, “Security at the St. Patrick’s Day Parade is:” and “Security at the St. Patrick’s Day Festival is:” Responses are shown in Figure 5.

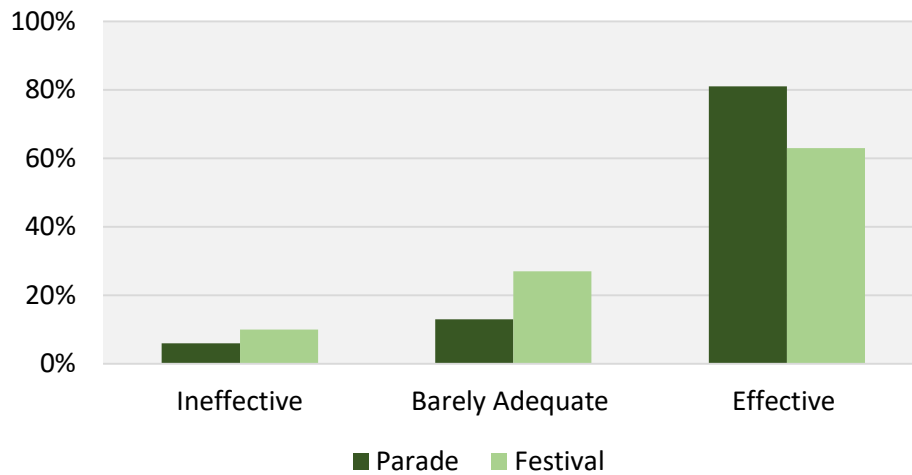
Figure 5: Security: Parade vs. Festival



Perception of security was generally favorable, with 69 percent finding security at the parade effective, and 61 percent finding security at the festival effective. Only seven percent of people found the security for the parade ineffective, while 11 percent found security at the festival ineffective.

Next, the team examined the overall perception of the level of organization. This question gathered information on how well participants think this event operates. Some issues will come up each year, but this question sought to find out whether the vocal complainers are representative of a larger group or simply commenting on their own issues. The questions asked were, “Organization of the St. Patrick’s Day Parade is:” and “Organization of the extended St. Patrick’s Day Festival is:” Responses are shown in Figure 6.

Figure 6: Event Organization: Parade vs. Festival



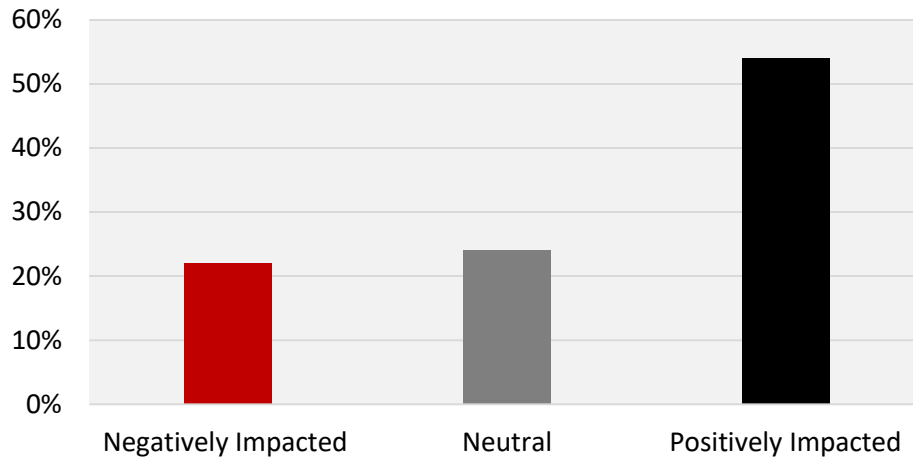
As with security, the responses were favorable, with 81 percent approving of the organization of the parade and 63 percent finding organization of the festival effective. This shows that, despite the unknown issues that come up each year, overall, the business community is generally satisfied with the operation of the festival.

Despite the overall positive sentiment seen in the responses to queries posed by the questionnaire, some of the comments were less positive. Of thirty comments, seven mention security concerns with comments like, “Great event. Needs better security for ensured safety to visitors” and “...help solve the crime problem. The crime issue is big and more needs to be done.” Six mention organizational concerns, with five of those mentioning a lack of accessible bathrooms, and the unpleasant consequences that result from that issue, with comments like, “Provide more porta johns. Tired of people urinating in my parking lot,” and “I have to close my business for several days each year because my hallway (upstairs in City Market) is lined with people waiting (or not waiting—it’s a huge mess) to use the bathrooms.” Others mention parking concerns for local residents, store owners, and employees.

Financial Benefits of the Parade and Festival

As part of the analysis of the financial benefits, the research team asked participants to compare costs to a typical March weekend. This question marks a change in structure for the survey questions as participants were asked to give their opinion regarding the economic and financial impact of the festival but not the parade. The specific question asked was, “What is your opinion regarding the economic and financial impact on your organization of the *extended St. Patrick’s Day Festival*?” Figure 7 shows the distribution of responses.

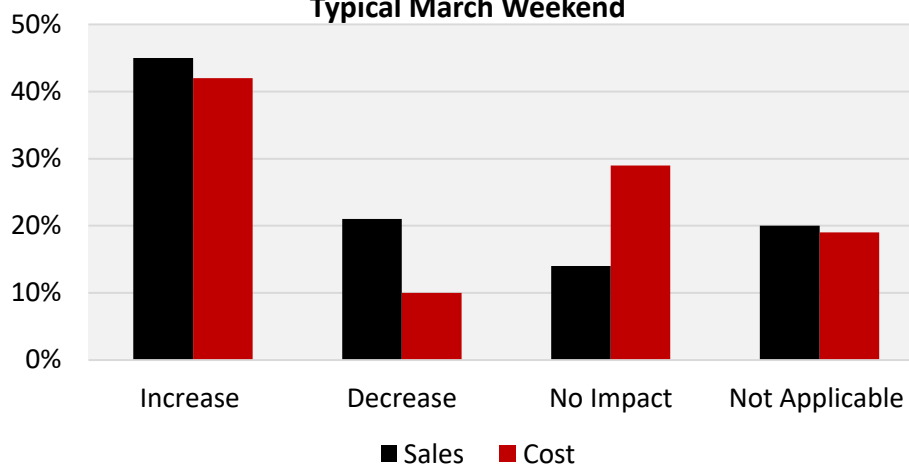
Figure 7: Economic and Financial Impact of St. Patrick's Day Festival



When compiling the negative and neutral responses, the team finds that 46 percent of business experience limited or a negative impact. This means that just over half of the firms in downtown view the impact of the St. Patrick's Day Festival as being positive for the economy and for their bottom line.

Next, BBRED examined both sales and operating costs related to this festival as compared to a typical March weekend. The question asked was, "Relative to the typical March weekend without a special event, what was the impact of the 2017 St. Patrick's Festival on the *sales receipts* (total operational costs incurred by) of your organization?" The results are shown in Figure 8.

Figure 8: Sales and Operating Costs: St. Patrick's Day vs. Typical March Weekend



When asked about their sales and operating costs, many business noted an increase in both factors. On a percentage basis, the sales increases did not offset the other factors asked about in these questions. For example, although sales increased for 45 percent of businesses

surveyed, 59 percent reported either a decrease in sales, no impact, or not applicable. The same is true for cost, with 42 percent reporting increased costs and 58 percent reporting either decrease in cost, no impact, or not applicable.

For both questions, the team asked for a percentage of increase for both sales and cost. Displayed in Figures 9 and 10 are the sales and cost percentage increases.

Figure 9: Sales Increase: St. Patrick's Day vs. Typical March Weekend

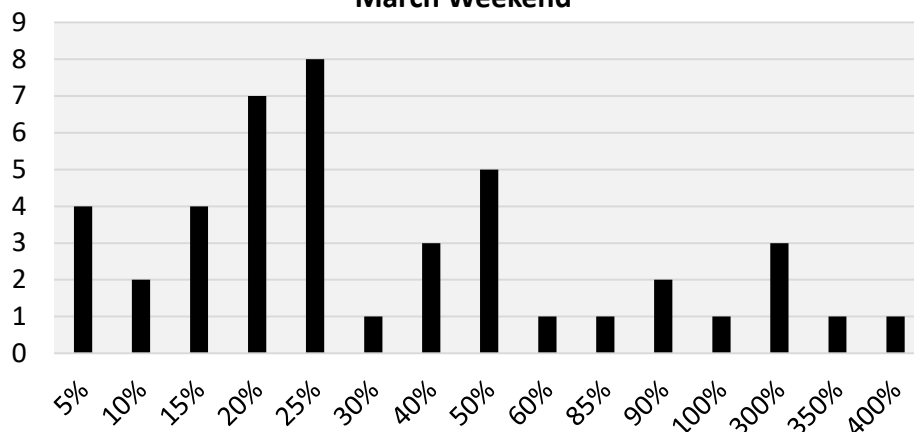
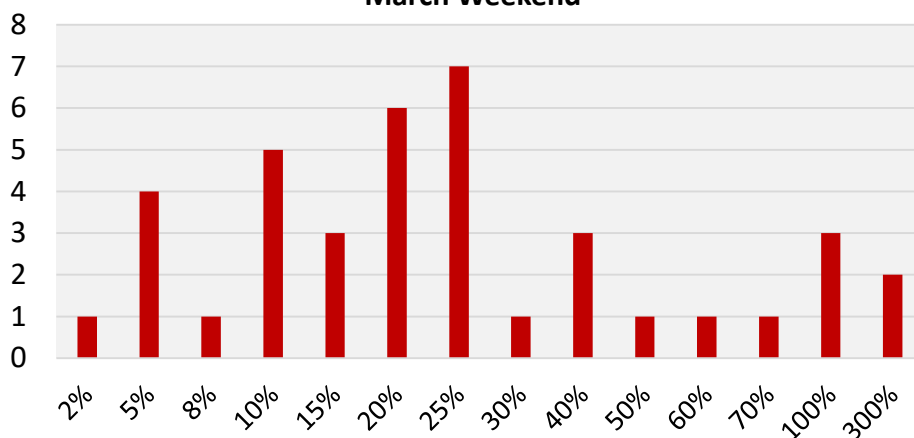


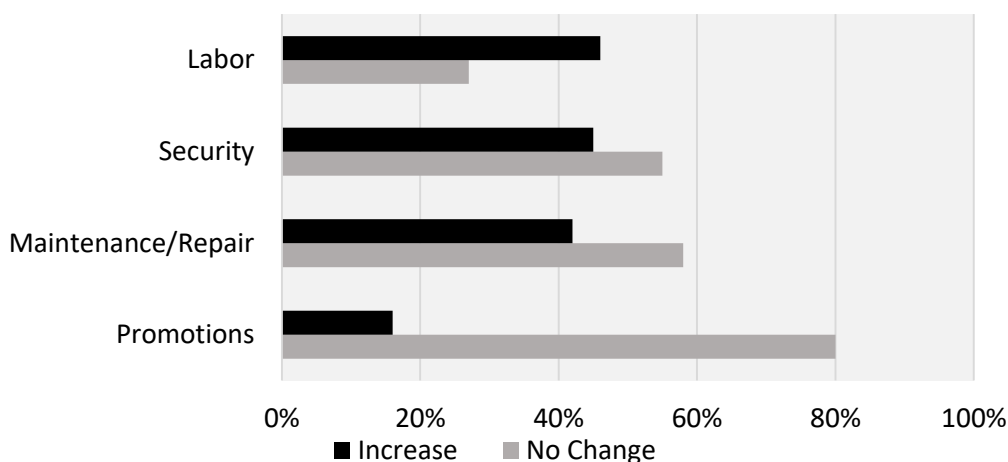
Figure 10: Cost Increase: St. Patrick's Day vs. Typical March Weekend



Both sales and cost increases ranged widely with some business reporting a large increase in both factors. Overall, it was more common to see either factor increase in a smaller way. The mode (i.e., the most frequently occurring observation) was 25 percent for both factors, while the median reported increase was 25 percent in sales and 20 percent in costs. Based on these findings, the typical downtown respondent's business saw a relatively small increase in both sales and costs as a result of St. Patrick's Day, but some respondents' businesses do see large increase in both sales and costs.

BBRED next examined which costs are more likely to increase. The four costs examined in this analysis are Labor, Security, Maintenance/Repair, and Promotions. Listed in Figure 11 is the percentage of respondents who report an increase in each of these areas of interest.

Figure 11: Changes in Cost Compared to a Typical March Weekend



The three largest cost drivers are labor, security, and maintenance. These figures are closely aligned with the previously reported increases in cost. It does appear that businesses that close or adjust their business practices during these events reported no change in their operating costs. In addition, most businesses are not promoting what they are doing during the festival. This means that, for businesses that cannot participate or have chosen not to be open during this event, an opportunity cost, lost sales, and/or lost productivity is the primary cost impact.

Finally, because hosting this event could be a way to get first-time visitors interested in Savannah, the team considered whether respondents who felt that first time visitors to the festival would return to Savannah were in any way concentrated within a respondent grouping on total operating cost increases. The goal was to see if businesses that experienced an increase in operating costs would also sense a positive, longer term impact in that they expect visitors to return.

Approximately one-third of respondents felt that festival visitors would not return, approximately one-third felt they would return and saw an increase in costs during the festival, and approximately one-third felt visitors would return but did not report an increase in costs during the festival. Taken together, respondent perceptions of how their businesses are faring during the event does not impact their views of the longer-term impact of the total event. Stated differently, respondents' views on impact to their businesses is only one factor that influences their perceptions of the festival. Despite the negative aspects of the festival on respondents' businesses, it is possible that they are supportive of the festival due to some form of civic pride, and this may be a feeling that, once a visitor comes to Savannah, s/he would surely want to return. Alternatively, this event could also be viewed as part of the price that

business owners must pay to work in a community that also experiences a tourism industry from which s/he benefits for the rest of the year.

Tax Analysis

The research team began this part of the report by examining the annual revenue in relevant categories collected by the City of Savannah between 2000 and 2016. Relevant revenues included in this part of the analysis are taxes and fees that could be paid by visitors to the City of Savannah. These total annual revenues are listed in Table 3.

Table 3: Total Annual Revenues From Taxes and Fees Relevant to Visitors

	2000	2004	2008	2012	2016
Local Option Sales Tax	\$29,859,828	\$34,592,667	\$41,280,037	\$37,841,206	\$37,787,557
Beer Taxes	1,889,639	1,978,691	2,042,347	2,084,750	2,098,515
Liquor Taxes	302,470	322,727	345,085	455,824	458,678
Wine Taxes	297,730	353,617	406,556	527,746	555,226
Mixed Drink Tax	0	659,106	920,662	1,271,621	1,357,920
Hotel Occup Transp Fee	0	225,432	1,045,370	1,298,690	1,386,534
Parking, Transportation & Fines Fees	4,699,184	5,747,229	7,823,611	12,430,252	12,636,543
Total	\$37,048,851	\$43,879,469	\$53,863,669	\$59,466,657	\$56,280,972

Revenue collection increased by 52 percent from 2000 to 2016 in these categories. This is due to an increase in the local population, which expanded from 293,000 in 2000 to 379,199 by 2015,¹⁸ and increased tourism, from 5.6 million visitors in 2000 to 13.7 million in 2016.¹⁹ This increase in demand has led to an increase in supply, which has, in turn, meant that more tax revenue has been collected.

Building on this overview, the team studied the monthly City of Savannah revenues, by category, between January 2006 and June 2017. This shift in the timeframe was made because monthly data were only available going back to 2006. The revenues included in this analysis were sales taxes and fees such as those for parking or motor coaches. Excluded from this analysis were taxes paid by visitors on an indirect basis, such as property taxes and taxes paid by employees of businesses that are impacted by visitor spending. Table 4 lists the revenue

¹⁸ Savannah Economic Development Authority, retrieved from <http://www.seda.org/Data-Sets/Population-and-Demographics> on October 13, 2017.

¹⁹ 2001 tourism statistics, retrieved from <http://savannahnow.com/stories/102602/LOCTOURISMSTATS2001.shtml?p#.WeDujVtSxpg> on October 13, 2017.

categories considered by the research team to be most impacted by the St. Patrick's Day Festival.

Table 4: Tax Accounts included Impact in the Analysis

Revenue Description	Revenue Account
Local Option Sales Tax	41201
Beer Taxes	41301
Liquor Taxes	41302
Wine Taxes	41303
Mixed Drink Taxes	41308
Hotel Occupancy Transp. Fee	42631
Motor Coach Permits	45453
Parking Revenue	454
Transfers from the Hotel/Motel Tax Fund	48175
Transfers from the Rental Vehicle Tax Fund	48180

The research team next examined the revenue account data provided by the City and found instances in which it was clear that receipts for certain months had been recorded in others. For example, on occasion, revenue of zero for one month would be followed with nearly double the expected revenue in a following month. The team assumed that these values were the result of the timing of data entry. In such situations, the data was cleaned by replacing the raw data values for the two months with the average revenue across both months. For example, if June reported zero dollars collected and July reported \$200 collected, the team increased the June total by \$100 and decreased the July total by \$100.

In other situations, a corrective transfer of funds out of an account may have resulted in negative revenue being recorded for the month. Where possible, we determined the likely month for which the correction was performed. If reasonable doubt regarding the validity of any suggested data adjustment existed, no corrections were made to the raw data. A small proportion of the actual corrections made did occasionally impact the month in which St. Patrick's Day revenue was collected. Given the small number of changes and overall bias to leave data unchanged, the team feels that the data cleaning had a very limited impact on the results of our analysis. Two accounts, Local Option Sales Tax and Parking Revenue, did not require any data correction. Two other accounts, the Mixed Drink Taxes and the Transfers from the Hotel/Motel Tax Fund, appeared to need some correction, but the exact correction needed was not clear, and changes were not made to the raw data.

To further explore and validate the data, correlation analysis was conducted. A correlation coefficient presents the extent to which a pair of variables seem—by their patterns—to be related. Correlation coefficients can assume values between -1 and +1. A value of zero indicates no correlation between the variables. Values of +1 or -1 represent perfect positive and negative correlations. Positive correlations suggest that variables behave similarly, whereas negative

correlations suggest that variables behave in opposite ways. For example, sales of heating fuel would be negatively correlated with air temperature observations and positively correlated with sales of winter clothing. Table 5 displays a correlation matrix that indicates the coefficient for each pair of variables in the analysis. This matrix includes two sets of correlations based on two different scenarios. In the first scenario, March revenues are significantly larger than in the average month. The second scenario holds March revenues closer to a typical month. The deciding factor in these two scenarios is the level of visitors in March. These estimates were achieved not by creating an estimate of the number of visitors, which was outside of the scope of this analysis. Rather, the research team used slightly different data cleaning methods. Scenario one used the average method described previously in this section to clean the data. Scenario two used seasonal factors from nearby years instead of averaging. The adjustment in methods resulted in differences in correlations listed in Table 5. Please note that scenario one is in black text and scenario two is in red text.

Table 5: Total Revenue Account Correlations Matrix*

Revenue Source	Local Option Sales Tax	Beer Taxes	Liquor Taxes	Wine Taxes	Mixed Drink Tax	Hotel Occup Transp Fee	Motor Coach Permits	Parking Revenue	Trans-Hotel/Motel Tx Fd	Transfer-Rent Veh Tx Fd
Local Option Sales Tax	1									
Beer Taxes	0.07 -0.01	1								
Liquor Taxes	-0.08 -0.11	0.35 0.24	1							
Wine Taxes	-0.10 -0.28	0.01 0.24	0.43 0.29	1						
Mixed Drink Tax	-0.11 -0.20	0.30 0.15	0.57 0.47	0.40 0.44	1					
Hotel Occup Transp Fee	-0.13 -0.22	0.30 0.05	0.33 0.37	0.33 0.46	0.70 0.56	1				
Motor Coach Permits	-0.15 -0.13	0.07 0.15	0.34 0.48	0.28 0.38	0.40 0.50	0.41 0.52	1			
Parking Revenue	-0.31 -0.36	0.09 0.09	0.46 0.47	0.32 0.60	0.51 0.51	0.56 0.68	0.61 0.58	1		
Trans-Hotel/Motel Tx Fd	-0.08 -0.15	0.37 0.21	0.53 0.46	0.44 0.60	0.85 0.80	0.77 0.66	0.37 0.60	0.52 0.62	1	
Transfer-Rent Veh Tx Fd	0.12 -0.07	0.47 0.16	0.37 0.34	0.27 0.36	0.49 0.41	0.46 0.45	0.14 0.40	0.17 0.30	0.60 0.60	1

*Note scenario one is presented in black text and scenario two is in red text

Based on this table, several practical relationships should be noted. Within these relationships, it is unknown which factor within the relationship is causing the link. First, hotel taxes are

strongly linked to mixed drink taxes. This mean the bars and restaurants located near hotels should consider carrying a wide variety of cocktails and that economic developers should consider this linkage when helping firms to make location decisions. Next, parking revenues are typically strongly correlated with each type of alcohol consumption. Within the City of Savannah, residents and visitors are coming downtown for unique places to eat and drink. Therefore, maintaining a strong level of bars and restaurants downtown will continue to strengthen this relationship and potentially increase foot traffic downtown. Finally, LOST revenues are moderately negatively correlated with parking, and only weakly negatively correlated with other travel and restaurant revenues including alcohol, hotel, and parking fees. This means that sales on “tangible personal property and certain services,” which could include goods like tee shirts or hats, are likely taking place at times when most consumers are not getting drinks in downtown Savannah. These findings are general; it is possible that, during events like St. Patrick’s Day, consumers are buying both items.

There is a second explanation for the negative correlation with LOST revenue. In 2012 the City of Savannah and Chatham negotiated a new agreement on sharing LOST revenues. This agreement led to a decline in tax collected by the City and is not explained by consumer spending. Using this information as a guide, the second analysis created a second correlation matrix for the years 2013-2017. The findings for this part of the analysis are displayed in Table 6.

Table 6: Correlation Matrix in LOST Tax Sample 2013 – 2017*

Revenue Source	Beer Taxes	Liquor Taxes	Wine Taxes	Mixed Drink Tax	Hotel Occup Transp Fee	Motor Coach Permits	Parking Revenue	Trans-Hotel/Motel Tx Fd	Transfer-Rent Veh Tx Fd
Local Option Sales Tax Sample 2013 - 2017	0.16	0.08	0.14	0.15	0.34	0.20	0.10	0.38	0.35

*Note scenario two data was used in this table

This table indicates that the pattern of receipts in the first LOST correlation matrix may not be reflective of the current consumption patterns in wine, mixed drinks, or parking revenues due to factors not linked to consumer spending. In this case, the 2012 intergovernmental agreement sample changed the pattern of revenue collection which resulted in changes in comparisons between each of these variables.

In both the first and second scenario, liquor and wine taxes indicates moderate positive correlations with hotel/motel occupancy, motor coach permits, and parking receipts. The beer taxes stood out because of their weak correlations with wine taxes. Thus, in Savannah, monthly

consumption patterns for beer and wine are unrelated. All revenue streams under consideration were found, in a separate Analysis of Variance (ANOVA), to be statistically independent ($p < 0.0001$). This means that each of these revenue streams independently adds value to our attempt to explain the overall pattern in revenue receipts. Taken together, the limited requirements for data cleaning, the logicity of the observed correlations, and the independence demonstrated by ANOVA suggested that each of the observed revenue streams added valid and useful information for inclusion in our analysis of tax receipt patterns.

The research team next examined the impact of seasonality on revenue collections. From a statistical standpoint, seasonality is observed in any pattern that repeats itself predictably. Though seasonality does result from weather patterns, it also results from many other predictable cycles. For example, from a productivity perspective, a given hour of the week could be considered a season (productivity is usually lowest in the first hour of the first day of the week). From the perspective of City of Savannah revenue collections, it is reasonable to consider the week of the St. Patrick's Day Festival as a unique season.

Seasonal impacts are determined by comparing the pattern in an actual time series data set with a pattern that averages out seasonal effects. In our case, we compared actual monthly revenue with a twelve-month centered moving average (CMA) of monthly revenue. For any month, the ratio of revenue to the CMA is a point estimate of the seasonal effect for that month and is called a "multiplicative" seasonal index. Averaging the seasonal index for a given month across multiple years removes random variation in the seasonal effect and provides a reliable estimate of the actual seasonal effect. For example, an average multiplicative seasonal index of 0.90 indicates that the seasonal effect of that period is to reduce the time series value to 90 percent of the average.

The St. Patrick's Day Festival impacts Savannah revenues for approximately one week in March; therefore, an ideal time series to estimate the revenue impact of the festival would use weekly revenue collection data. The City of Savannah, however, records revenues on a monthly basis. Therefore, it was not possible to collect information regarding the relevant revenue time-series that would directly indicate the impact of the St Patrick's Day Festival on city revenues.

In order to overcome this limitation and estimate the St. Patrick's Day Festival effect on revenues, the research team needed to estimate seasonality, using a time-series that represents March revenue as if no festival occurred and comparing this to the existing time series that does include St. Patrick's Day revenues. The seasonal index derived from actual city revenues has been termed the "Raw Seasonal Index," whereas the seasonal index from a March without the St. Patrick's Day has been termed the "Adjusted Seasonal Index."

To estimate revenues in a hypothetical Savannah without the St. Patrick's Day Festival, the team assumed that city revenues in the first weeks of March would be similar to the latter weeks of February and revenues at the end of March would be similar to the early weeks of April. Based on this assumption, both scenarios used the revenues received in February and

April to estimate March revenues without a St. Patrick's Day Festival. Table 7 displays the Raw Seasonal Index and the Adjusted Seasonal Index for each of the revenue categories for the month of March. Note that values greater than 1.0 indicate that March revenues are higher than the CMA for the revenue category. Thus, March is a high revenue month in each category in both scenarios. Further, in scenario one, the table illustrates that the greatest seasonal effect in March is found in the Motor Coach, Liquor, and Parking revenue categories.

Table 7: Scenario One Seasonal Indices

Revenue Source	Raw Seasonal Index	Adjusted Seasonal Index	Difference March with & without St. Patrick's Day
Local Option Sales Tax	1.075	1.069	0.58%
Beer Taxes	1.077	1.072	0.54
Liquor Taxes	1.265	1.245	1.96
Wine Taxes	1.165	1.157	0.89
Mixed Drink Taxes	1.158	1.148	1.00
Hotel Occupancy Transp. Fee	1.077	1.071	0.58
Trans-Hotel/Motel	1.144	1.139	0.43
Transfer - Rent Veh	1.063	1.050	1.26
Motor Coach Permits	1.954	1.566	38.75
Parking Revenue	1.166	1.056	10.97

*Note scenario one is presented in black text and scenario two is in red text

In the second scenario, taxes on alcohol, Motor Coach, and Hotel taxes are the largest sources of seasonal impacts. Displayed in Table 8 are the seasonal indices.

Table 8: Scenario Two Seasonal Indices

Revenue Source	Raw Seasonal Index	Adjusted Seasonal Index	Difference March with & without St. Patrick's Day
Local Option Sales Tax	1.075	0.981	5.48%
Beer Taxes	1.077	0.945	12.99
Liquor Taxes	1.265	0.930	34.17
Wine Taxes	1.165	1.022	16.93
Mixed Drink Taxes	1.158	1.092	6.86
Hotel Occupancy Transp. Fee	1.077	1.045	5.82
Trans-Hotel/Motel	1.144	1.105	8.10
Transfer - Rent Veh	1.063	0.984	9.17
Motor Coach Permits	1.954	2.063	19.79
Parking Revenue	1.166	1.114	-2.61

*Note scenario one is presented in black text and scenario two is in red text

The difference between the Raw Seasonal Index and the Adjusted Seasonal Index provides a seasonal index for the revenue effect of the St. Patrick's Day Festival in both scenario one and two. Tables 7 and 8 detail the calculation of this St. Patrick's Day Index. Notice that on a percentage basis, the St. Patrick's Day Festival has the greatest impact on revenue from Motor Coach permits and Parking, with Liquor Taxes being a distant third in the first scenario. In the

second scenario alcohol taxes lead the way followed by motor coach permits and hotel taxes. As noted previously, multiplying this index by the twelve-month centered moving average (CMA) of monthly city revenue provides an estimate of the impact of the St. Patrick's Day Festival on City revenues. Similarly, multiplying the CMA by the Raw Seasonal Index provides a smoothed estimate of the City's March Revenue in each category (See Table 9).

Table 9: Typical Fiscal Impact of Hosting and Not Hosting St. Patrick's Day

Revenue Source	Typical Monthly Revenues	Typical March Revenues	Difference between March and the Average Month	Total Revenue linked to St. Patrick's Day
Local Option Sales Tax	\$3,283,127	\$3,529,787	\$246,660	\$19,016
Beer Taxes	174,563	188,000	13,436	942
Liquor Taxes	37,043	46,847	9,804	726
Wine Taxes	48,090	56,048	7,958	429
Mixed Drink Taxes	116,004	134,280	18,277	1,158
Hotel Occupancy Transp. Fee	127,136	136,869	9,732	734
Trans-Hotel/Motel	871,556	996,662	125,105	3,720
Transfer - Rent Veh	37,794	40,162	2,368	474
Motor Coach Permits	3,625	7,083	3,458	1,405
Parking Revenue	1,085,020	1,264,688	179,669	119,032
Total- Scenario One	\$5,783,958	\$6,400,425	\$616,467	\$147,637
Total-Scenario Two	\$5,783,958	\$5,945,147	\$161,189	\$285,280

Based on the first scenario, the City of Savannah collects about \$5.8 million in a typical month. Revenues in March increase by \$616,000. From this total, about \$148,000 can be attributed to the St. Patrick's Day Festival. In the second analysis, the City of Savannah still collects \$5.8 million in revenue in a typical month. Revenues in March are \$5.9 million and only increase by \$161,000 and the revenue linked to St. Patrick's Day increases to \$285,000. The fiscal impact of St. Patrick's Day should be viewed as revenue over a typical March weekend therefor it does not include the other revenue that is still being collected over this timeframe in the listed variables in Table 8.

The differences between the two scenarios can be summed up by examining how each treats spending patterns that can be attributed to visitors. The first analysis is generally assuming that more revenues are linked to visitors than to residents which is leading to more visitor-related spending in March but fewer of these visitors are contributing to St. Patrick's Day revenue. In the second scenario more revenue is linked to local residents, but less revenue is related to visitors coming in March to Savannah overall. In this second scenario it is assumed that fewer out of area visitors means that more local residents attend these events.

The changes in market dynamics can also impact the different variables used in this analysis. This is most clearly noted in revenue linked to St. Patrick's Day events listed in Table 8. The overall analysis found that the Local Option Sales Tax varies widely between an increase of about \$19,000 to \$180,000 over the typical March weekend. This wide variation is due to the visitor's interest in shopping. It is possible that out of area visitors will spend less on goods at St. Patrick's Day events because they have to cover other costs related to attending the event. The three alcohol taxes also have a wide spread of about \$3,250 to \$51,000 over a typical March weekend. It is possible that some residents and visitors are concentrating their alcohol consumption to one timeframe of the event, which could impact the overall consumption of alcohol and the associated additional tax collection. The only way to truly identify consumption patterns is to survey participants at the event, which was beyond the scope of this analysis.

Next, hotel taxes also vary between scenarios ranging from \$4,485 to \$78,000 over a typical March weekend. This is due to both the number of visitors, the distance traveled, and number of people per room. The largest area of variance in this analysis is the amount of tax revenue linked to transportation. In scenario one vehicle rental fees, motor coach permits and parking revenue added together to total an increase of \$120,900 in tax revenue linked mostly to visitor parking at the event. In scenario two, these fees fall below a typical March weekend and the City of Savannah is losing -\$24,180. The explanation is that out of area visitors are trying to park close to the event and local residents are using shuttles. In addition, the loss of parking space related to the parade and other events does not have a large impact on revenue collection. The only way to address this discrepancy is with additional research at the event using survey and observational research techniques.

In both scenarios, tax revenue could be linked to the economic effect of crowding out. The timing of the St. Patrick's Day event could be experiencing this issue because this event falls near the beginning of Savannah's busy season. This could make it more challenging to find the incremental gains in revenue because the hospitality industry is already operating nearing capacity. In this type of environment, the most desirable goods are already being used, leaving only the less desirable goods available. These less desirable goods are not necessarily ones that match the needs of those who wish to visit Savannah for a leisure trip. Under this scenario consumers tend to ask questions like, "Is the service or good I want available, can I afford it, and how long will I have to wait for it?"

The other phenomenon at play in this situation is the elasticity of demand. Demand has a balance point at which consumers are indifferent between similar goods, such as a trip to Savannah or a trip to Charleston, or visiting Savannah either before or after St. Patrick's Day. Big events such as St. Patrick's Day change the demand equation for many reasons, including the concerns for cost and availability seen in crowding out while also encompassing exogenous factors that will change their enjoyment of services once they are secured. The question is not so much "Can I get it," but rather, "Will I enjoy it as much as I would have in other circumstances." Consumers will seek to maximize gains in their utility function by moving in the

direction of their personal preferences. For some, this will lead toward festival attendance, but for others it will result in the choice to not attend.

Based both on the supply constraints of Savannah's hospitality industry and the short term change in the perceived desirability of visiting Savannah during the festival, it can reasonably be argued that St. Patrick's Day tourists crowd out other tourists who would have visited had the festival not been under way. This may occur either because potential visitors prefer a different atmosphere or because they were unable to secure accommodations and reservations for other services that match their needs.

The crowding out and demand elasticity effects on tax revenues clearly have a short-term influence during the parade and festival. The long-term impact of these effects depends on two factors that were beyond the scope of this analysis. First, we do not know if the festival participants are equally or more freely spending than the tourists they displaced. Second, we do not know if the displaced tourists have postponed or permanently canceled their trips to the region. It is safe to assume that some of the tourists displaced by the festival choose to come to Savannah on a different weekend, rather than going elsewhere, so that revenue is not lost entirely. It also seems likely that some of the tourists who come for the festival would not otherwise visit Savannah, so we are attracting revenue we would not otherwise gain. Additionally, the festival tourists that some consider to be young and rowdy non-shoppers may eventually grow up and have families. It is possible that attending the festival now will draw them back later, when they have more to spend. According to a cheapflights.com poll of 1,053 travelers, more than 85 percent of travelers return to places they have already been, with "great weather" and "good prices" topping their reasons to return.²⁰ Warm destinations such as Florida and California top the list for repeat visitors, making capture of some of these repeat tourists a reasonable goal for Savannah.

City of Savannah Operating Cost

The additional revenues related to St. Patrick's Day events also come with some significant costs that are incurred by the City of Savannah. Based on conversations with city staff, most of these costs are shouldered by the Police Department. One of the largest costs is personnel. The department must pay overtime to current staff and compensation to temporary staff for this event. Due to St. Patrick's Day events, the department uses a 12 hour shift format, which means that officers will work 12 hours on shift and 12 off in place of a normal eight hour shift. These extra hours (i.e., hours worked over the normally scheduled 40 hours) are paid overtime at time and a half. This event normally uses more than half the police department's annual overtime budget. In addition, the Savannah Police Department requests support, typically in the form of new staff, from other local departments and state agencies. The support is needed because the Savannah Police Department does not have enough staff to manage this event.

²⁰ Bly, Laura. Tried and True: U.S. Travelers Revisit Same Places. *USA Today*, 2013, retrieved from <https://www.usatoday.com/story/dispatches/2013/01/17/cheapflights-survey-travel-florida-vegas/1838429/>, on September 18, 2017.

Typically, the local Savannah MSA, which includes Chatham, Bryan, and Effingham, will provide some personnel, but officers from other departments outside of this area are employed to manage the event. These officers then need to be housed and compensated for their time, a cost covered by the City of Savannah.

Some of the other costs covered by the Police Department include feeding the officers and other staff working the event. These meals are provided because it is often difficult to leave this event, and it is department policy that when 12 hour shifts are used, meals will be provided. In addition, the physical crowd control and traffic barriers are also provided by the department. These devices must be put in place and removed as needed by the event, and they must be maintained or replaced as needed. Two other major contributors to this event are the Sanitation Bureau and Public Works departments. Together, these departments ensure that streets are cleaned nightly and that vehicle traffic does not interfere with this event.

This overview of the mandatory expenses highlights that this event incurs substantial costs. These costs are both directly related to operating the event, and incurred indirectly through annual planning for this event. Some of the planning costs create new indirect costs because staff are working on planning or evaluating the past event and not pursuing other projects. These are called opportunity costs because staff is being forced to choose between the St. Patrick's Day events and other activities. It is always possible that these other events could be beneficial to the community. So, if implementing more of these alternative (forgone) projects would produce more value for the community, then St. Patrick's Day is slowing the future development of this community.

Despite these direct and indirect costs, it is unclear whether scaling back this event would have a positive impact on the overall human capital infrastructure within this community. Both the City of Savannah and other stakeholders in the tourism industry benefit from this event, in part because of the skills developed in managing it. Every tourism community has a major/signature event that it is known for by visitors, and these events are used by stakeholders as points of reference. This can make it less daunting to try other new events. For example, the City of Savannah hosts a Rock 'n' Roll Marathon. This is the only other event at which the Police Department uses the 12-hour shift format. It is possible that, without the skills developed to manage the St. Patrick's Day events, it would be more difficult to manage the marathon, which, in turn, could make it less likely that the next large event will choose Savannah.

Conclusion

When considering the interviews, survey, and statistical analysis of tax receipts, it is clear that March in Savannah would be a major tourist season even without the St. Patrick's Day Festival. Though the impact of the festival on City of Savannah tax receipts is positive, the increase in receipts is well below the expenses incurred by the City related to hosting the festival. This is not an uncommon feature of hosting larger or hallmark events. This makes post-event assessments an important part of hosting this type of event. Overall, the City of Savannah gains between \$148,000 to \$285,000 in revenues and fees from hosting the St. Patrick's Day Festival in a revenue year such as the one between July 2016 and June 2017. In order to narrow the forecast range, the research team would need to conduct additional research which falls outside of the current scope of work. This research would include more information on where visitors are coming from, how they are getting to the event, duration of their visit, and spending patterns of visitors at the event. All of this information can best be gathered using in person interviews at the event.

Differing perspectives are held in the Savannah business community regarding the various aspects of the St. Patrick's Day Festival. The parade itself is very popular with downtown businesses and is viewed in a positive way by an overwhelming majority of these proprietors; however, the extended festival is viewed in a much less consistent way. While some businesses benefit substantially from the extended festival, a higher percentage of individual businesses see either a decrease in sales or no change than see an increase. As might be expected, those businesses that do see an increase in sales also typically experience increased costs.

Despite the ambivalence toward the extended festival, survey participants believe that it does draw repeat visitors to the area, and the team's research has shown that travelers tend to return to familiar places. The concerns expressed about the nature of the visitors attracted—namely that they are young “no spenders”—may be overcome in the perception of some downtown business people due to the potentially increased likelihood of future visits to Savannah from these same individuals. If the extended festival attracts young visitors who return with their families later in life, then it serves as a beneficial part of Savannah's event portfolio regardless of its short term impact.

The team has touched on the benefits of tourism in general, and the St. Patrick's Day events in particular, to the local population in terms of access to increased entertainment and dining amenities, but it bears stating that the events not only draw outsiders but also retain the portion of the Savannah area population who might otherwise look elsewhere for somewhere to celebrate. The number of people who attend Savannah's events illustrates a strong regional demand for an event of this type on St. Patrick's Day. If Savannah no longer meets that demand, someone else in the market will fill the void.

Interviews with stakeholders indicated that the extended festival has taken on previously unseen dimensions in recent years—and particularly in 2017. One indicator of this difference *might* be the change seen in Motor Coach Permit receipts in 2017. The City would do well to investigate changes in this account and determine the extent to which costs and safety concerns associated with overcrowding on River Street—especially in the late night hours—are impacted by motor coach traffic. Some community-driven revisions to access policies may be needed to ensure the sustainability of the festival and safety of participants.

If the organizers wish to dampen the increasing party atmosphere of the festival without alienating the stakeholders attracted by that aspect of the event, then placing increased emphasis on the peripheral events might shift the focus while also serving a more diverse group of stakeholders, including businesses potentially harmed by the festival, that might benefit from increased small events in the week leading up to St. Patrick’s Day.

Appendix A: Survey Responses

The St. Patrick's Day Parade

When answering the following questions, please consider only the Savannah St. Patrick's Day Parade separate from the remaining events that happen during the Festival days surrounding this.

Q1 What is your opinion regarding the <i>St. Patrick's Day Parade</i> ?				
Strongly Negative	Negative	Neutral	Positive	Strongly Positive
1.6%	5.7%	17.1%	23.6%	52.0%
N=123				

Q2 The <i>St. Patrick's Day Parade</i> benefits the image of Savannah in the region and country.				
Strongly Negative	Negative	Neutral	Positive	Strongly Positive
2.4%	6.5%	11.3%	39.5%	40.3%
N=124				

Q3 Media coverage of the <i>St. Patrick's Day Parade</i> benefits the image of Savannah in the region and country.				
Strongly Negative	Negative	Neutral	Positive	Strongly Positive
2.4%	4.8%	9.7%	42.7%	40.3%
N=124				

Q4 First time visitors to Savannah who come to watch the St. Patrick's Day Parade will likely return to visit the city at other times.				
Strongly Negative	Negative	Neutral	Positive	Strongly Positive
2.4%	9.7%	11.3%	43.5%	33.1%
N=124				

Q5 Security at the <i>St. Patrick's Day Parade</i> is:			
Very Ineffective	Ineffective	Barely Adequate	Effective
5.0%	1.7%	24.0%	69.4%
N=121			

Q6 Organization of the <i>St. Patrick's Day Parade</i> is:			
Very Ineffective	Ineffective	Barely Adequate	Effective
2.5%	3.3%	13.2%	81.0%
N=121			

Q7 Promotion of the <i>St. Patrick's Day Parade</i> is:			
Very Ineffective	Ineffective	Barely Adequate	Effective
4.1%	5.7%	11.4%	78.9%
N=123			

Q8 The organization I represent (as employee or owner) benefits from the <i>St. Patrick's Day Parade</i> in non-economic ways				
Strongly Disagree	Disagree	Neither	Agree	Strongly Agree
13.0%	20.3%	23.6%	22.0%	21.1%
N=123				

The St. Patrick's Day Festival When answering the following questions, please consider the entire Savannah St. Patrick's Day Festival including all events and activities that occur during the period of the festival.

Q8 What is your opinion regarding the <i>extended St. Patrick's Day Festival</i> ?				
Strongly Negative	Negative	Neutral	Positive	Strongly Positive
8.9%	15.3%	19.4%	27.4%	29.0%
N=124				

Q9 The <i>extended St. Patrick's Day Festival</i> benefits the image of Savannah in the region and country.				
Strongly Negative	Negative	Neutral	Positive	Strongly Positive
7.3%	17.1%	19.5%	30.1%	26.0%
N=123				

Q10 Media coverage of the <i>extended St. Patrick's Day Festival</i> benefits the image of Savannah in the region and country.				
Strongly Negative	Negative	Neutral	Positive	Strongly Positive
5.7%	16.3%	30.1%	28.5%	19.5%
N=123				

Q11 First time visitors to Savannah who come to participate in the <i>extended St. Patrick's Day Festival</i> will likely return to visit the city at other times.				
Strongly Negative	Negative	Neutral	Positive	Strongly Positive
5.6%	17.7%	13.7%	39.5%	23.4%
N=124				

Q12 Security for the <i>extended St. Patrick's Day Festival</i> is:				
Very Effective	Effective	Barely Adequate	Ineffective	Very Ineffective
18.2%	43.0%	28.1%	7.4%	3.3%
N=121				

Q13 Organization of the <i>extended St. Patrick's Day Festival</i> is:				
Very Effective	Effective	Barely Adequate	Ineffective	Very Ineffective
14.8%	48.4%	27.0%	6.6%	3.3%
N=122				

Q14 Promotion of the extended St. Patrick's Day Festival is"				
Very Effective	Effective	Barely Adequate	Ineffective	Very Ineffective
17.2%	51.6%	22.1%	5.7%	3.3%
N=123				

Q15 The organization I represent (as employee or owner) benefits from the <i>extended St. Patrick's Day Festival</i> in non-economic ways:				
Strongly Disagree	Disagree	Neither	Agree	Strongly Agree
19.5%	21.1%	24.4%	17.9%	17.1%
N=123				

Economic and Financial Impact of the St. Patrick's Day Festival When answering the following questions, please consider the entire Savannah St. Patrick's Day Festival including all events and activities that occur during the period of the festival.

Q16 What is your opinion regarding the economic and financial impact on your organization of the <i>extended St. Patrick's Day Festival</i> ?				
Strongly Negative	Negative	Neutral	Positive	Strongly Positive
8.1%	13.8%	24.4%	25.2%	28.5%
N=123				

Q17 <u>Relative to the typical March weekend without a special event</u> , what was the impact of the 2017 St. Patrick's Festival on the <i>sales receipts</i> of your organization?			
Increase	No Impact	Decrease	Not Applicable
44.5%	14.3%	21.0%	20.2%
N=119			

Q18 <u>Relative to the typical March weekend without a special event</u> , what was the impact of the St. Patrick's Day festival on the total operational costs incurred by your organization?			
Increase	No Impact	Decrease	Not Applicable
41.5%	28.8%	10.2%	19.5%
N=118			

Q19 <u>Relative to the typical March weekend without a special event</u> , how much extra did you spend on labor (e.g. temporary workers, overtime, bonuses etc.) due to the St. Patrick's day festival?			
Increase	No Impact	Decrease	Not Applicable
45.8%	27.1%	4.2%	22.9%
N=119			

Q20 <u>Relative to the typical March weekend without a special event</u> , how much extra did you spend on security due to the St. Patrick's day festival?		
Increase	No Change	Decrease
44.5%	54.6%	0.8%
N=119		

Q21 <u>Relative to the typical March weekend without a special event</u> , how much extra did you spend on maintenance and repair due to the St. Patrick's day festival?		
Increase	No Change	Decrease
42.1%	57.9%	0.0%
N=121		

Q22 Relative to the typical March weekend without a special event, how much extra did you spend on promotions (e.g. sales, advertising, etc.) due to the St. Patrick's day festival?

Increase	No Change	Decrease
15.7%	79.5%	4.8%
N=83		

Q31 *About you:*

Q23 Which of the following best describes your business/organization's location? (select only one)

On River Street	City Market	Downtown Savannah	City of Savannah, Not Downtown	Chatham County Outside Savannah	Outside of Chatham County in Savannah MSA	None of the Above
20.2%	14.6%	46.1%	9.0%	4.5%	1.1%	4.5%
N=89						

Q24 Which of the following best describes your organization (select only one)

Hospitality Restaurant	Hospitality Bar	Hospitality - Hotel/Motel	Tours and visitor services	Retail store - consumables (convenience store, groceries, gasoline etc.	Retail store - non consumables (clothing, artwork, souvenirs, etc.)	Other: please describe
9.0%	2.2%	27.0%	15.7%	6.7%	18.0%	21.3%
N=89						

Q25 Which of the following best describes your location of residence (select only one)

Downtown Savannah	Savannah not downtown	Chatham county (not Savannah)	Other
34.8%	29.2%	25.8%	10.1%
N=89			

Q26 Your age is	
Mean	48.6
Median	48.5
Mode	41
N=84	

Q27 Your gender is?		
Male	Female	Prefer not to Answer
44.9%	48.3%	6.7%
N=89		

Q28 How long have you been a part of the Savannah Community?	
Mean	22.3 years
Median	17 years
Mode	4 year
N=85	

Q29 *Unsolicited input:* Are there any other perspectives you wish to provide with regard to the economic or social/community impact of the St. Patrick's Day festival?

R2	The spring break atmosphere that the night part of St. Patrick's Day (and Celebration) is no more or less concerning than the safety of locals and visitors on every other Friday and Saturday night in the historic district. Please don't break up the police dept and add more cops in downtown during weekend nights.
R4	The festival is a vital part of our budget each year.
R8	By allowing all the cart vendors there is a negative impact on our overall sales.
R9	Great event. Needs better security for ensured safety to visitors. Needs better support and backing from local government. The city needs to embrace this event just as the citizens and visitors do.
R13	If businesses are forced to close...then it cannot be good for business.
R19	IMO, the Festival supports a different audience than the parade. Parade is family, with Festival moving to drunkenness and more troublemakers as the night progresses, especially once you pass dark and then worse past 10pm. Even if that visitor returns they are too often the wrong demographic who don't spend enough while often inhibiting the higher spending visitor and resident. Thx / / /
R21	The extended festival and food vendors hurt the River Street Restaurants
R24	This past St. Patrick's should have been more profitable for our hotel. The City is making it unattractive to visitors. We only have a couple of City events that can draw large numbers of people; St. Patrick's and Rock-n-Roll. We should do whatever we can to / ensure these two events are successful. Two things come to mind that could possibly help; slow down the building of new hotels unless the CVB and Trade Center can bring NEW visitors/groups to town and help solve the crime problem. The crime issue is big and more needs to be done.
R25	in the four years that I have experienced St. Pats in Savannah, the demographics of the vistors have changed. In my view, the event attracts a very different audience than a typical spring weekend.
R31	Would like to see more wholesome events produced and promoted to decrease the street drinking atmosphere -- NOT eliminate it. / Bicycle rides, museum tours, history tours, dolphin view boat rides, etc.
R34	The parade is fine, but in City Market and on River Street the rest of the festival resembles college spring break. Nothing but drunk people. I have to close my business for several days each year because my hallway (upstairs in City Market) is lined with drunk people waiting in line (or not waiting - it's a huge mess) to use the bathrooms. No one is there to buy art, and the courtyard downstairs is wall to wall drunks. The atmosphere is quite appealing to young people, but quite off-putting to mature adults and families. I wish there were a way to limit the areas where all-day drinking is encouraged, although I do understand that some City Market businesses benefit from the situation as it stands. As it is, I just stay away until it's over.
R37	Great for drunks and people who want to pretend to be Irish. Awful for business.
R41	It's a trashy non-shopping crowd that comes, and messes up the beautiful city

R42	The party atmosphere of St. Patrick's Day is fine as long as it stays in city market or river street. However, on the parade route we are forced to close on or more days, we lose revenue, have to provide security and at the point in festival we can open we still have to deal with extra litter, porta-potties on our property and inebriated guests that buy a tour ticket only to use our restrooms or worse throwing-up on valuable carpets and furnishings. In general hotels, restaurants and bars benefit from the event the rest of us just have to tolerate the event. I am also disappointed when local media interviews bar patrons that say the only reason they come to Savannah at this time is to stay drunk during the entire festival.. That is a really great image for Savannah on top of the crime issue.
R44	With the ever changing times, maintaining positive traditions is even more important - to the community and to the younger generations to see that some things really can last. This is an event that brings people together for fun for a day or few, while bringing the life blood economics back into our town after a cold winter. It marks the beginning of "the season" for tourism.
R50	The parade organization is difficult to contact, their response time is poor, they present the concern to add new organizations into the parade. This is no surprise as it could easily be argued that the parade is too long. / / Crowd control on River Street after dark is ineffective if not hopeless. / / More of the downtown streets should be made to be pedestrian only from 11AM to 2AM during the days of the festival (i.e. Broughton, Bull, Lincoln, and Barnard).
R51	The impact of the parade is for food service business that does not sell alcohol is nominal to none. Between the closing of the streets during the day of the parade to business owners closing the stores early due to all the drunks people breaking things and going to our bathrooms, there is no benefit at all.
R53	In general, I think the St Patrick's Day Parade & extended festival are an excellent source of additional revenue for the community and should be expanded and improved where possible.
R54	10 years ago with just the parade, everyone was happy. Adding 3 days of partying cost hoteliers more for security, room damage and additional staffing.
R58	Your survey is flawed and appears biased.
R59	Provide more porta johns. Tired of people urinating in my parking lot
R65	I feel that the levels of debauchery and the participation by under age individuals in this event (especially the Festival) I firmly believe it is only a matter of time before someone is seriously injured or killed at this event and the publicity that would arise out of such an event could be very damaging. We've succeeded in raising the bar in the type of festival and quality of life experiences in the city- this ancient remnant of days gone by simply needs to be eliminated OR substantially altered.
R68	In terms of my Visual Arts, the weeks leading up to St. Patrick's Day and the day before is very profitable. However, on St. Patrick's Day, there are many people who are more in a sociable mood than a buying mood; therefore all vendors upstairs, tend to close their doors. Overall, it is a good thing to have because it brings exposure to the beautiful City of Savannah and profits to mostly everyone. The downside, is the alcohol that may lead to drunkenness...

R72	Majority of visitors to City Market are young and drunk, and only interested in partying. Families and regular visitors who happen to be in town during the festival are always surprised and disappointed by the tone of the festival, which seems to be geared solely towards drinking at City Market. The entire area, including Congress St should be pedestrian only. The biker bands on stage and the cars parked directly in front of our business (in the middle of the road and on the sidewalks) for 5 days straight effectively kill our sales and limit our street and sidewalk visibility. We can not open the doors due to the noise, and car exhaust. The music choices for the City Market stage should be much more diverse and family friendly - and more in tune with authentic St Pats festivities. The stage should be moved as to not block off businesses (what about Ellis Square or Franklin Square?), and the pass from the law the bands get for parking should be eliminated. As business owners who have to park downtown EVERYDAY, musicians and radio guys who are downtown once a year should not be able to break the law and park on the sidewalks! We always attract shoplifters during Saint Pats, and we call 911, but have found it faster to leave our business and go find an officer on the street due to slow/no response. We have to close early every night because the crowds feel rowdy and out of control. This past year we decided for safety to be closed on St Pats, and the previous year we were only opened for 5 hours on St. Pats and then closed due poor sales. For crowd control, we had to put tables in our business across the front door. I think City Market policies have hurt regular businesses in the area. Street vendors are allowed to patrol up and down the streets, selling wares - while everyday businesses suffer because of the 5 day drunken 'festival.' The entire event really needs to be classed up!
R74	the parade is too long, need more pomp and circumstance, no float, balloons, per se
R76	Wrist bands were too expensive in 2017. River Street festival now excludes locals.
R77	The employees that work downtown during these events should be provided with some type of parking options and also that are not double the rate that they normally are. If businesses are not open and available; why would anyone come to the festival. The local people need to be taken into consideration so the tourists can be taken care of and want to return to Savannah.
R78	I would think the St. Patrick's Day Events in Savannah help boost the economy and the tourism industry. When I travel and people ask me where I'm from and I say Savannah they immediately know of it and say oh you have a big St. Pat's Celebration or your town is beautiful or I've never been there, but want to come visit.
R105	I don't think some of the questions really ask what they were intended to ask. / D
R111	Limit it to the day of the parade.
R119	Ore Gallery closes the day of Parade but we do sell T-Shirts out side of / our store.
R120	Stop looking at how must Beer companies make. If your view is to have an image of very drunk people the CONGRATULATIONS you did it. Savannah is not built on very drunk people it is built on quality. Nothing in this weekend brings quality to Savannah. You know that, I know that. We may well board up our stores this year, our damage in Savannah costs us \$12,000 in 2017, with 6 stores I see that hitting \$25,000 an we cannot allow that. My goal this year is to take photo's of drunk people, people being sick, fighting and promote that via social media, maybe then someone will look at respect 51 weeks of the year we look for people to enjoy Savanah, respect Savannah and love Savannah the way we did and one week a year I have to have people defecating outside my store, throwing up in my store, pissing in my store, ripping awnings down, smashing display stands, smashing signs, CAN'T WAIT!!!
R121	Provide more security. Promote the parade early. People ask all the time when is the parade and no one knows until a month before.