



The Preservation Society of Newport County: A Community Impact Study



THE
PRESERVATION SOCIETY
OF NEWPORT COUNTY

This report was researched and created by Alyssa Lozupone, 2013-14 Public Policy Fellow for The Preservation Society of Newport County, with the help of Dr. Timothy Tyrrell and various members of the Preservation Society's staff and Board of Trustees.

The Mansions of the Preservation Society of Newport County have been the major tourist attraction for Newport and the State of Rhode Island for at least the past fifty years. As a professor at URI from 1978 until 2005 I conducted dozens of economic impact studies of Rhode Island tourism events, businesses and communities. Many of these were conducted in Newport and several focused directly on the economic contributions of the Newport Mansions. In 1994 and again in 2000 I conducted surveys of Mansion visitors to determine their expenditures on- and off-site and the importance of the Mansion visits to tourist decisions to visit the City and State. These studies confirmed common knowledge of the importance of the Mansions to the State's tourism industry and gave scientific proof of the economic impacts of the work of the Preservation Society.

The following study of the 2013 economic impacts estimated that the 650 thousand visitors to the Mansions generated \$76 million in expenditures. This compares favorably with my 2000 estimate of \$58 million in expenditures by 603 thousand Mansion visitors. I was honored to help Ms. Lozupone and her team in conducting her new analysis which used a comparable methodology, carefully updated information and a more extensive investigation into the operations of the Society than I was able to do 14 years ago. The impacts, while large, are not exaggerated, which is a common complaint about these sorts of reports. The reader who carefully reviews the text, footnotes and appendices will find that the data sources are current, the details of the calculations are clearly spelled out and the methodology is deliberately conservative. I have every confidence that the report reflects the best estimates that can be made and am pleased to be associated with its release.

Tim Tyrrell, Ph.D.

Emeritus Professor, Environmental and Natural Resource Economics, University of Rhode Island (1978-2005); Professor, Tourism Development and Management Program, Arizona State University (2005-2013)

Dr. Tyrrell has conducted tourism research studies in the United States and overseas, served as an advisor to state agencies, and published papers on the economics of tourism. He conducted an investigation about the impact of the Amoco-Cadiz oil spill on the tourism industry of Brittany, France, and an investigation of the impacts of land use management on Phuket, Thailand tourism. He developed programs to monitor the tourism industries of Fairbanks, Alaska, Southeastern Connecticut, Rhode Island, Georgetown County, South Carolina, the province of Nova Scotia, and Sergipe, Brazil. He studied the fly-fishing industry's impact on the city of Roscoe, New York and analyzed the economic role of scenic byways in Vermont.

I am very pleased to see the release of the 2013 Economic and Community Impact Study of the Preservation Society of Newport County.

As the Director of Tourism for the State of Rhode Island for 25 years, I found economic impact studies to be extremely valuable tools to educate government leaders on the critical importance of the tourism industry in generating jobs and revenues. The numerous impact studies that I commissioned during my career chronicled the emergence of what has become one of Rhode Island's largest employers. I have seen first-hand how sound economic research, like Ms. Lozupone has conducted, really helps people understand why an industry or an attraction like the Newport Mansions are so essential to our state's economy and quality of life.

The visitor and expenditure data in this study are clear proof that the mansion properties of the Preservation Society of Newport County continue to play a major role in the health and growth of Rhode Island's tourism industry – and that's important to everyone in our state.

David C. DePetrillo

Rhode Island Director of Tourism, 1983-2008



Marketing and Business Consulting

**Economic and Community Impacts of
The Preservation Society of Newport County
in the City of Newport and State of Rhode Island**

I was asked to review and comment on the aforementioned study, (PSNC), by Dr. Timothy Tyrrell who is currently a Senior Sustainability Scientist at The Global Institute of Sustainability at Arizona State University and who I worked very closely with conducting an Economic Impact study for WaterFire Providence back in 2004.

Since 1988, I have headed Acadia Consulting Group, a strategic consulting firm located in Providence, RI. We provide market research, strategic planning and consulting services for organizations throughout the Country. We are an analytically oriented group that develops strategies and plans based on information culled from the marketplace.

The PSNC study I reviewed, which was conducted by Alyssa Lozupone, was truly outstanding. I found the findings to be poignant, compelling and based on data, assumptions and calculations that, for me, seemed rock solid.

Alyssa's style of presenting a vast amount of information made for a very clear, logical and powerful narrative – like a good novel that grabs you in quickly then, chapter by chapter, lays out the plot before your eyes. It was all there.

For me, few researchers and analysts have the ability to not only gather the right information in the right way, but also tell what it all means. And not just by the numbers or the dollar signs or the charts, but by the words. Few can do it in so few words and as eloquently and succinctly as Alyssa did in this study.

For me, it wasn't the numbers or dollars or growth rates I walked away with after reading this study. It was that The PSNC gave Newport something so much more – as Alyssa put it – 'A Sense of Place.' The data, the findings and the study overall, left me with the lasting importance of that. Well done.

Donald Keinz

President, Acadia Consulting Group

The current state of our nation’s historic houses is precarious. Sites throughout the U.S. are experiencing major declines in attendance, struggling with debt, and suffering from physical deterioration that exceeds organizations’ budgets.¹ Historians and preservation experts have begun to lose hope in the future of historic house museums, predicting that many will not be able to survive within the current social and political climate.² The Preservation Society of Newport County sympathizes with these fears, as it too must cope with the nation’s waning interest in history and the increasing need for, and price of, preservation, restoration, and conservation work. Despite adversity, the Preservation Society is fortunate in that it continues to flourish and attract thousands of visitors each year. The City of Newport is fortunate to have thriving historic sites, while so many communities throughout the U.S. are struggling to sustain their built heritage. The hope is that this document will demonstrate the vital role the Preservation Society plays in the economic, social, and cultural vitality of Newport.

¹ “Time is Running Out for America’s Historic Houses,” *The Art Newspaper*, 2013, <http://www.theartnewspaper.com/articles/Time-is-running-out-for-Americas-historic-houses/31216>.

² *Ibid.*

Economic Force in the City of Newport

In total, including both direct and secondary effects, the Preservation Society generates over **\$109.4 million** for the City’s economy, **1,268 jobs** for Newport residents, and over **\$30.1 million in local household wages**.

Contributor to City Finances

The Preservation Society’s operations generate over **\$648,000** for the City’s coffers; this includes donations, taxes and fees.

Driver of Tourism

Nearly **650,000 visitors** came to the Newport Mansions and Preservation Society events last year, equaling nearly **940,000 admissions**, which makes the Society’s properties among the **four most visited** museums in New England.

Catalyst for Local Spending

Visitors to the Newport Mansions and Preservation Society events spend over \$115 per day in the City. This is equivalent to a total direct expenditure of nearly **\$76.0 million** within the local economy, which directly supports **786 jobs** and over **\$18.6 million in wages** in Newport.

Job Creator

44% of Preservation Society employees (176 individuals) are City of Newport residents. This translates to nearly **\$3.2 million in local household wages**.

Supporter of Local Business

The Preservation Society generates over **\$1.2 million** for the City’s economy through the purchase of goods and services from local businesses. This spending directly supports **ten jobs** and over **\$309,000 in wages**.

Contributor to Quality of Life

In addition to contributing to the City’s economic vitality, the Preservation Society enhances the community’s quality of life. It **aids the maintenance and beautification** of City- and community-owned property, **enhances the learning** of the City’s youth through partnerships with local schools and non-profits, **improves the cultural and social life** of residents of all ages through academic programs and special events, and **supports local organizations** through sponsorships.

Profile of the Preservation Society

The Preservation Society is a non-profit organization dedicated to the protection, preservation and presentation of Newport County's historic architecture, landscapes and decorative arts.³ The Society is accredited by the American Alliance of Museums (AAM).⁴ This distinction is significant given that only six percent of all museums within the United States are AAM accredited.⁵

The Society owns and maintains eleven historic properties, seven of which are National Historic Landmarks, and an eighty-eight acre arboretum.⁶ The Society's eleven historic sites represent the finest achievements in American architecture, decorative arts, and landscape design from the Colonial era to the Gilded Age.⁷



In addition to interpreting these historic sites, the Preservation Society hosts various educational programs, special events and other activities in an effort to engage the public in the rich story of Newport County's history and its relationships to larger trends within American cultural heritage.⁸



³ "Our Mission," *The Preservation Society of Newport County*, 2013, <http://www.newportmansions.org/about-us/our-mission>.

⁴ Ibid.

⁵ Julie Hart, "Excellence at All Levels: Applying Standards at Your Museum" (presentation, Annual Conference of the New England Museum Association, Newport, RI, November 13-15, 2013).

⁶ John Rodman, "The 'Public Programming' Conundrum" (presentation, Annual Conference of the New England Museum Association, Newport, RI, November 13-15, 2013).

⁷ "Our Mission," *The Preservation Society of Newport County*.

⁸ Ibid.

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Definitions

Economic impacts are the net changes to the City and State’s economy as a result of the Preservation Society’s operations that would otherwise not occur.⁹

Direct economic impacts include the output, and resultant jobs and wages, generated by the organization’s expenditures on employee payroll and the purchase of goods and services, as well as expenditures by visitors to the Newport Mansions and Preservation Society events.¹⁰

Secondary economic impacts represent the spending by the recipients of direct expenditures.¹¹ They include both *indirect* and *induced* effects.

Indirect effects are the production changes resulting from the multiple rounds of re-spending initiated by the industries that supply goods and services to the Preservation Society.¹² For example, the vendor the Society pays for a good and/or service, or the business at which a tourist spends money, uses the proceeds from the sale to make subsequent expenditures on local labor and/or materials.¹³

Induced effects are the changes in economic activity resulting from household spending of income earned directly or indirectly as a result of the Preservation Society’s operations.¹⁴ For example, the wages earned by a Preservation Society employee are spent and become income for other local businesses.¹⁵

Total economic impact is the sum of direct and secondary effects.

Output is the total value of all goods and services produced in an economy.¹⁶

Wages include all forms of compensation excluding benefits.¹⁷

Jobs include both permanent full-time and part-time employees.¹⁸

⁹ Philip Watson, Joshua Wilson, Dawn Thilmany and Susan Winter, “Determining Economic Contributions and Impacts: What is the difference and why do we care?” *Pedagogy in Regional Studies* 37, no. 2 (2007): 16.

¹⁰ Kent Gardner, *Regional Economic Impact of the Corning Museum of Glass* (Albany, NY: CGR, 2012), 7.

¹¹ Ibid.

¹² Daniel J. Synes, *Economic Impacts of Tourism* (Illinois: Illinois Bureau of Tourism, 1997), 15.

¹³ Gardner, *Corning Museum of Glass*, 7.

¹⁴ Synes, *Economic Impacts of Tourism*, 6.

¹⁵ Ibid.

¹⁶ “Economic Output: Definition,” *Education Portal*, 2013, <http://education-portal.com/academy/lesson/economic-output-definition-lesson-quiz.html#lesson>.

¹⁷ “About the Data,” *American Fact Finder*, 2013, www.factfinder2.census.gov/faces/help/jsf/pages/metadata.xhtml.

¹⁸ Ibid.

Total Economic Impact

Impact on the City's Economy

The total economic impact of the Society's operations on the City of Newport's economy is over **\$109.4 million**. This output generates a total of **1,268 jobs** and over **\$30.1 million in wages** in Newport.

Impact on City Cooffers

The Preservation Society is responsible for the contribution of **\$648,013** to the City's coffers.

Preservation Society Payments to the City	\$216,095
Taxes generated as a result of visitor spending	\$431,918
Total Contribution	\$648,013

TABLE 1

Preservation Society's Economic Impact on the City of Newport				
	Impact	Output	Jobs	Wages
Payroll				
<i>The Society's wages paid to employees.</i>				
Direct Impact		\$3,186,294	176	\$3,186,294
Secondary Impact		\$1,147,066	10	\$1,147,066
<i>Subtotal</i>		<i>\$4,333,360</i>	<i>186</i>	<i>\$4,333,360</i>
Purchasing				
<i>The Society's spending on goods and services.</i>				
Direct Impact		\$1,274,312	10	\$309,221
Secondary Impact		\$458,752	4	\$111,319
<i>Subtotal</i>		<i>\$1,733,064</i>	<i>14</i>	<i>\$420,540</i>
Visitor Spending				
<i>Spending in Newport by the Society's visitors.</i>				
Direct Impact		\$75,986,686	786	\$18,658,367
Secondary Impact		\$27,355,207	283	\$6,717,012
<i>Subtotal</i>		<i>\$103,341,893</i>	<i>1,068</i>	<i>\$25,375,380</i>
Total		\$109,408,316	1,268	\$30,129,280

Note: Rounding can lead to a variation of +/- \$1 or 1 job.

Impact on the State’s Economy

The economic impact of the Society’s operations on the State’s economy far exceeds **\$136 million**. Available research to date has not captured Preservation Society visitor spending outside the City of Newport, and therefore this estimate is only a portion of the Society’s total economic impact on Rhode island. The Society’s economic impact on the State also includes more than **1,949 jobs** and over **\$40.7 million in wages** in Rhode Island

Impact on State Coffers

The Preservation Society’s operations generate **\$5,447,152** in taxes for the State.

TABLE 2

Preservation Society’s Economic Impact on the State of Rhode Island				
	Impact	Output	Jobs	Wages
Payroll				
<i>The Society’s wages paid to employees.</i>				
Direct Impact Statewide		\$7,371,734	369	\$7,371,734
Secondary Impact Statewide		\$4,791,627	50	\$4,791,627
<i>Subtotal</i>		<i>\$12,163,361</i>	<i>419</i>	<i>\$12,163,361</i>
Purchasing				
<i>The Society’s spending on goods and services.</i>				
Direct Impact Statewide		\$3,485,248	24	\$760,517
Secondary Impact Statewide		\$2,265,411	16	\$494,336
<i>Subtotal</i>		<i>\$5,750,659</i>	<i>40</i>	<i>\$1,254,853</i>
Visitor Spending				
<i>Spending in Newport by the Society’s visitors.</i>				
Direct Impact Statewide		\$75,986,686	954	\$17,443,545
Secondary Impact Statewide		\$42,338,798	535	\$9,882,854
<i>Subtotal</i>		<i>\$118,325,484</i>	<i>1,489</i>	<i>\$27,326,398</i>
Total		\$136,239,504	1,949	\$40,744,613

The impact of visitor spending on the State level outlined above only represents direct expenditures in Newport and the secondary effects this spending has on the State’s economy. The estimate is conservative, as visitor spending in other Rhode Island cities was not included due to the absence of relevant survey data.

Note: Rounding can lead to a variation of +/- \$1 or 1 job.

Economic Impact of Preservation Society Operations

The daily operations conducted by the Preservation Society to protect, preserve, and present Newport's historic architecture and landscapes have a significant impact on the City's local economy. The Society is a self-sustaining enterprise that serves as a major employer of city, county and state residents; a substantial consumer of goods and services from within the local economy; and a generator of revenue for the City's coffers.

Payments to the City

The Preservation Society pays the City for the services it provides to the Society. On an annual basis the Society also makes voluntary payments to the City and to help support various City services and events. These transactions represent the Society's role as an equal partner within the community, and moreover, as a significant generator of income for Newport.

In fiscal year 2013 the Society contributed over \$236,000 to support the City, nearly \$79,000 of which were voluntary contributions.

TABLE 3

Payments to the City in Fiscal Year 2013	
Water Payments	\$87,348
Police and Fire Detail	\$55,575
City Planning Department	\$50,000
Property Taxes	\$10,814
Licenses and Fees	\$8,858
Beach Parking Lot Rental	\$2,000
July 4 th fireworks ¹⁹	<u>\$1,500</u>
Total Payments to the City in Fiscal Year 2013	\$216,095
Payments to Support City Services in Fiscal Year 2013	
RIPTA trolley service	<u>\$20,000</u>
Total Payments in Fiscal Year 2013	\$236,095

In the last two decades the Preservation Society has contributed over one million dollars through its annual donation to the City of Newport.

Since 1994	\$50,000 annually
Prior to 1994	varying annual amount, totaling \$315,250
Total	\$1,371,500²⁰

¹⁹ James M. Burress (Director of Finance), e-mail communication with author, July 2013.

Job Creation

In calendar year 2012 The Preservation Society employed **400 individuals** and paid **\$7.8 million in wages**.²¹ A quarter of these individuals were full-time employees and nearly three-quarters held part-time positions.²² The Preservation Society provides employment opportunities for individuals of varying expertise and skill levels. Professional opportunities with the Society include positions working with landscape and property management, visitor experience, curatorial and conservation, special events, and retail sales. In addition to providing diverse employment opportunities, the Society provides job stability, the average tenure being eight years with the organization.²³

44.0% of these employees (176 individuals) are residents of the **City of Newport**, receiving **\$3,186,294** in wages.

73.5% of these employees (294 individuals) are residents of Newport County (including Newport), receiving \$5,602,152 in wages.

92.3% of these employees (369 individuals) are Rhode Island residents (including Newport County), receiving \$7,371,734 in wages.²⁴

Economic Impact of Jobs Created

In total, including both direct and secondary effects, the jobs and wages provided by the Preservation Society generate:

186 jobs in Newport	419 jobs in Rhode Island
\$4,333,360 in wages and output to Newport residents	\$12,163,361 in wages and output to Rhode Island residents

The jobs provided by the Preservation Society not only generate household income for residents throughout the State, but also produce funds for the State. In total, the Preservation Society withheld **\$277,000** in State income tax on the wages provided in 2012.²⁵

²⁰ 02/06/2013 PSNC Payments to City of Newport, February 6, 2013, Preservation Society of Newport County financial records.

²¹ Burress, e-mail communication, July 2013.

²² Ibid.

²³ Burress, e-mail communication, December 2013.

²⁴ Burress, e-mail communication, November 2013.

²⁵ Burress, in discussion with author, September 2013.

One of the Largest Employers in Newport

The Preservation Society was ranked the **seventh largest employer in Newport** in a 2013 audit conducted by the City, and has been in the top ten for the last ten years.²⁶

TABLE 4

Top Ten City of Newport Employers in 2013		
Employer	Employees	Percentage of Total City Employment
Naval Station Newport	4,500	34.8%
Newport Hospital	802	6.2%
City of Newport	622	4.8%
James L. Maher Center	571	4.4%
Salve Regina University	543	4.2%
Newport Restaurant Group	506	3.9%
Preservation Society	400	3.1%
Hyatt Regency-Newport	317	2.5%
Newport Harbor Corporation	297	2.3%
Marriott International Inc.	212	1.6%

Among the Largest Employers in Rhode Island

The State of Rhode Island groups employment into nine classes, ranging from one to four to 1,000 plus employees. The Preservation Society qualifies within the **third largest class of employers in the State**, which employs 250 to 499 individuals.²⁷

In Rhode Island fewer than 175 companies, 0.4% of all employers, employ 250 or more individuals.²⁸

The Preservation Society is responsible for **nearly half** (49.5%) of the jobs within the “museums, historical sites, zoos and parks” subset of the Arts, Entertainment and Recreation sector in Rhode Island.²⁹

²⁶ Laura Sitrin, *Comprehensive Annual Financial Report of the City of Newport, Rhode Island* (Newport, RI: City of Newport, 2013), 123.; All City of Newport audits from 2003-2013.

²⁷ “Employment by Size of Firm,” *Department of Labor and Training*, March 2013, www.dlt.ri.gov/lmi/pdf/size.pdf.

²⁸ “Employment by Size of Firm,” *Department of Labor and Training*.

²⁹ *Rhode Island Employment Trends and Workforce Issues* (Cranston, RI: RI Department of Labor and Training, 2013), 16.

Contributing to a Healthier Economy

While the City of Newport saw a *decline* in jobs between 2011 and 2012, the Preservation Society saw a **7.1% increase** in full-time equivalent employees and a **\$427,000 increase** in wages provided.³⁰

Without the Preservation Society, unemployment in the City would increase from 9.7% to 11.0%.³¹

³⁰ *Rhode Island Employment and Wage Analysis by County* (Cranston, RI: RI Department of Labor and Training, 2013), 2.; *Ibid.*, 1.; Burress, e-mail communication, July 2013; *11/12 Annual Report* (Newport, RI: Preservation Society of Newport County, 2012).

³¹ "Newport Labor Force Statistics," *Department of Labor and Training*, 2013, <http://www.dlt.ri.gov/lmi/laus/town/newport.htm>.; Burress, e-mail communication with author, July 29, 2013.

Purchase of Goods and Services

In order to fulfill its mission the Preservation Society engages a broad range of vendors within the city, county and state economy. These vendors vary in size as well as in the goods and services they provide. As a result, the organization helps to support businesses at all levels of the economy. Vendors range from the individual scholar, musician, or local restaurant; to the mid-sized architectural, landscape design, or engineering firm; to the larger utility or construction companies; and everything in between.

In fiscal year 2013 the Society engaged nearly **900 vendors** and spent over **\$10.7 million** in goods and services.

16.6% of the vendors were City of Newport based companies,
28.0% were Newport County (including Newport) based companies, and
42.7% were Rhode Island (including Newport County) based companies.³²

Economic Impact of Purchasing

A total of **\$1,274,312** was spent at local businesses and **\$3,485,248** in the State economy. It is estimated that this spending directly supports **ten jobs** and over **\$309,000** in wages in the City of Newport and **twenty-four jobs** and over **\$760,000 in wages** in the State of Rhode Island.

Taking into account both direct and secondary effects, it is estimated that the Society's spending on goods and services generates in total:

14 jobs in Newport	40 jobs in Rhode Island
\$420,540 in wages to Newport residents	\$1,254,853 in wages to Rhode Island residents
\$1,733,064 in output within the City economy	\$5,750,659 in output within RI's economy

The Preservation Society's total spending represents **over half** (58.4%) of all spending by historical non-profit organizations in Rhode Island and **over two-thirds** (69.6%) of all spending by the State's museums.³³

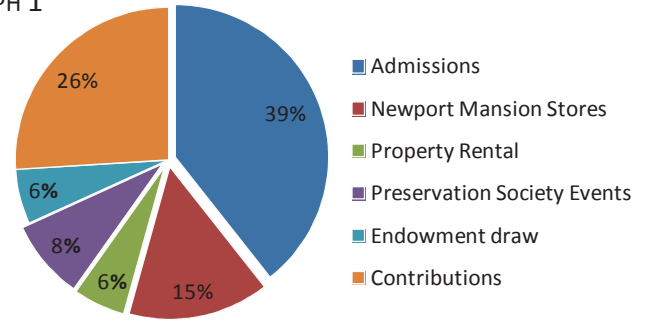
³² FY13 Vendors, September 12, 2013, Preservation Society of Newport County financial records.

³³ Planning Decisions, Inc., The Maine Center for Creativity, and Charles Colgan, *New England's Creative Economy: Nonprofit Sector Impact* (Boston, MA: New England Foundation for the Arts, 2011), 14.; Pie Charts for FY13 Annual Report, 2013, Preservation Society of Newport County financial records.

Operating Revenue

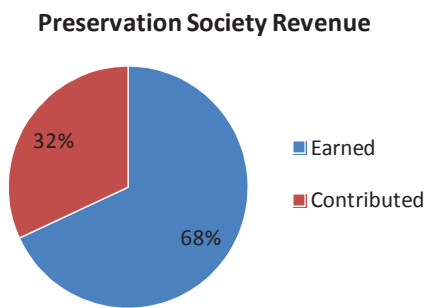
The Preservation Society is a **self-sustaining** operation. Two-thirds of operating revenue (68.2%) is earned income derived from the Society’s operations, which include admission to the Newport Mansions, sales at Preservation Society stores, rentals of the Newport Mansions, and Preservation Society events.³⁴

GRAPH 1

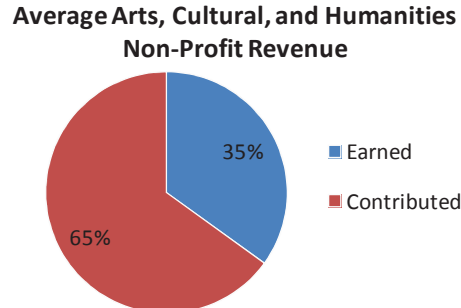


Less than one-third (31.8%) of the Society’s operations are dependent on donations, of which there are **limited** government contributions.³⁵ This distinguishes the Society from other arts, cultural and humanities organizations in Rhode Island; on average, two-thirds of an organization’s revenue is from contributions, 12% of which is from government sources.³⁶

GRAPH 2



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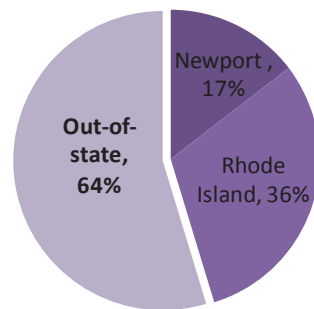


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Nearly two-thirds of the contributions to the Preservation Society come from individuals or foundations based outside the State of Rhode Island. This is *significant* as it represents investments in the City and State that might otherwise not be made.

GRAPH 3

Composition of Preservation Society Donors



³⁴ Pie Charts for FY13 Annual Report, September 12, 2013, Preservation Society of Newport County financial records.

³⁵ Preservation Society Annual Report, Fiscal Year 2013, Preservation Society of Newport County financial records.; Trudy Coxe (CEO, The Preservation Society of Newport County), in discussion with author, October 2013.

³⁶ *The Preservation Society of Newport County: Unrestricted Activity Comparison Report, Contributed Revenue Detail* (RI: Cultural Data Project, 2013), 1.

³⁷ Pie Charts FY13 Annual Report.

³⁸ *Contributed Revenue Detail*, 1.

The Preservation Society as a Driver of Tourism

The Preservation Society is a leader within the local, state, regional, and national tourism industries. The Society drives tourism to these areas through its interpretation of the Newport Mansions and hosting various special events, as well as the marketing that accompanies these activities and the year-round tourism they foster.

The Preservation Society as a Regional Tourism Leader

In 2013 the Newport Mansions were the **fourth most visited attraction in New England** and for the last five years have consistently ranked within the region's top five most visited sites.³⁹

TABLE 5

Institution	2013 Attendance
Museum of Science	1.4 million
New England Aquarium	1.2 million
Museum of Fine Arts	1.1 million
Newport Mansions	916,000
Mystic Aquarium	700,000

A State Tourism Leader

Museums are a primary driver of tourism in the State of Rhode Island; half of visitor spending within the entertainment sector of the State's tourism industry is spent at museums and historical sites.⁴⁰

Since the Preservation Society represents half of all spending by historical non-profits and nearly two-thirds of all spending by the State's museums, it follows that the Society is a primary driver of tourism in the State.⁴¹

³⁹ *Museums and Attractions of New England (MANE)* (Boston, MA: Museum of Science, 2013).; MANE reports from 2007-2013.

⁴⁰ Shane Norton, *Rhode Island and Tourism* (Rhode Island: IHS Global Insight, Inc., 2011), 24.

⁴¹ Planning Decisions, Inc., The Maine Center for Creativity, and Charles Colgan, *New England's Creative Economy: Nonprofit Sector Impact* (Boston, MA: New England Foundation for the Arts, 2011), 14.; Pie Charts for FY10 Annual Report, 2010, Preservation Society of Newport County financial records.

A Local Tourism Leader

For many tourists, the Newport Mansions are the primary reason for their trip to Newport:

91.7% of *Preservation Society* visitors consider the Mansions to be important (either “very” or “somewhat important”) when selecting Newport as a vacation destination.⁴²

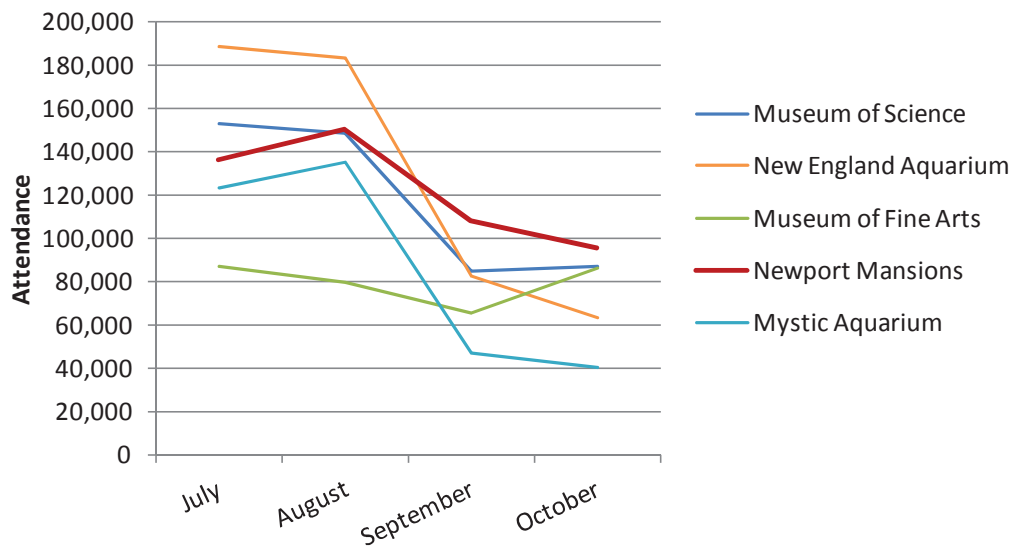
46.3% of *general Newport* visitors consider the Newport Mansions to be among the top reasons for selecting Newport as a vacation destination.⁴³

A Primary Driver of Off-Season Tourism

Not only does the Preservation Society draw visitors to Newport and Rhode Island during peak tourism season (summer months), but it is also one of the **number one attractions for off-season travel** in the State (fall and winter months).⁴⁴

In 2012, during the months of September and October the Newport Mansions were the **number one most visited site in New England**. For the last five years the Preservation Society has consistently held this ranking in September and/or October.⁴⁵

GRAPH 4



⁴² 2010 Newport Mansions Visitor Study (Wickford, RI: Advantage Marketing Information, 2010), 33.

⁴³ The Preservation Society of Newport County and The Newport County Convention and Visitors Bureau Consumer Study (Wickford, RI: Advantage Marketing Information, 2007), 12.

⁴⁴ Mark Brodeur (Director of Tourism), in discussion with author, October 2013.; “Mark Brodeur, Rhode Island Tourism Director,” *Travel Pulse*, December 18, 2011, <http://www.travelpulse.com/opinions/column/mark-brodeur-rhode-island-tourism-director.html>.; “Glossary,” *National Tour Association*, 2011, <http://www.ntaonline.com/for-members/resources/glossary/>.

⁴⁵ MANE.; MANE reports from 2007-2013.

Marketing

State Tourism

The Newport Mansions drive tourism in Rhode Island by acting as a distinct “product” used in all State public relation efforts locally, nationally, and internationally.⁴⁶

The Newport Mansions are “the number one historic attraction in the State,” and “truly the one thing that separates Rhode Island from the rest of the country.”⁴⁷

Preservation Society

The marketing efforts of the Society also promote tourism in the City and State overall.

The Preservation Society and its events generate over **\$50 million in earned media** in Newport’s travel and entertainment press.⁴⁸ The Preservation Society and its events also place **over half a million dollars in paid media** a year.⁴⁹

⁴⁶ Brodeur, in discussion with author, October 2013.

⁴⁷ Ibid.

⁴⁸ John Rodman (Director of Museum Experience), in discussion with author, October 2013.

⁴⁹ Ibid.

Tourism Generated by the Preservation Society

In 2012 there were nearly **640,000** people who took tours or attended events at the Preservation Society.⁵⁰ This represents **23%** of total visitation to Newport.

Visitation to the Newport Mansions

In 2012, there were over 600,000 people who took over 900,000 tours of the Newport Mansions.⁵¹ This reflects a steady increase in visitation in the last five years.⁵²

Visitation to Special Events

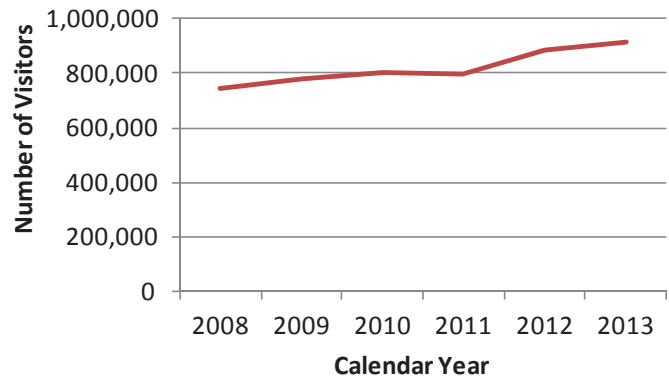
In 2012 special events held at the Newport Mansions attracted 39,779 attendees.⁵³

This included **fifty-five Preservation Society special events**, among which were prominent community events such as the Newport Flower Show, the Newport Mansions Wine and Food Festival, and the Newport Symposium.⁵⁴

The Preservation Society also hosted **106 third party special events**, which included private weddings; corporate rentals such as the Victoria's Secret and Ralph Lauren photo shoots; and events sponsored by organizations such as the Boys & Girls Club of Newport County, United States Coast Guard Academy, and the Newport Festivals Foundation.⁵⁵

These third party special events generate an estimated **\$2 million** a year for local service providers such as caterers, tent companies, photographers, designers, musicians, and florists.⁵⁶

GRAPH 5



⁵⁰ Ibid.; Beverly Ware (Special Events Manager), e-mail communication with author, October 2013.

⁵¹ Ibid.

⁵² Sales & Attendance Database, 2013, Preservation Society of Newport County visitor experience records.

⁵³ Ware, e-mail communication, October 2013.

⁵⁴ Ibid.

⁵⁵ Ibid.

⁵⁶ Rodman, in discussion with author, October 2013.

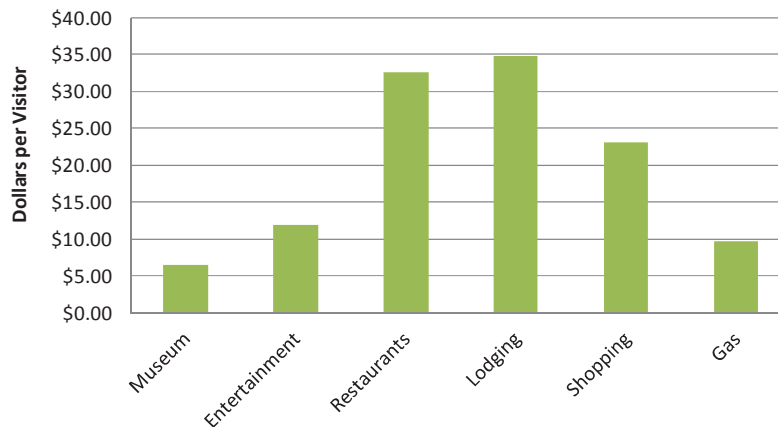
Economic Impact of Preservation Society Visitors

Visitors drawn to Newport by the Newport Mansions and Preservation Society events have a substantial impact on the local economy. As part of their visit they spend money at local lodging establishments, restaurants and bars, retail and souvenir shops, museums and other recreational and entertainment activities, and transportation services. The money spent generates jobs in these industries and household income for local residents.

Visitor Spending

It is estimated that, in addition to expenditures at the Newport Mansions, Preservation Society visitors spend on average over **\$118** while in Newport. This includes expenditures within the museum, entertainment, restaurant, lodging, shopping and transportation industries.⁵⁷

GRAPH 6



Economic Impact of Visitor Spending

Out of the total \$109 million in City economic impact, direct visitor expenditure within Newport's economy is nearly **\$76 million** per year. This spending directly supports **786 jobs** and over **\$18.6 million in wages** in the City of Newport and **954 jobs** and over **\$17.4 million in wages** in the State of Rhode Island. When taking into account both indirect and secondary effects it is estimated that spending by visitors to the Newport Mansions and Preservation Society events generates in total:

1,068 jobs in Newport
\$25,375,380 in wages to Newport residents
\$103,341,893 in output within the City economy

1,489 jobs in Rhode Island
\$27,326,398 in wages to RI residents
\$118,325,484 in output within the State economy

⁵⁷ Robert J. Johnston and Tim Tyrell, *The Preservation Society of Newport County 2000 Visitor Survey* (Wakefield, RI: Impact Research Associates, 2000), 4.

Taxes Generated

The nearly \$76 million spent directly by visitors while in Newport each year generates taxes for the local and state economy.

TABLE 6

State Sales Tax	\$1,033,122	Spending in local stores ⁵⁸
	\$1,464,391	Spending at local restaurants and bars ⁵⁹
State Lodging Tax	\$2,672,639	Spending at local lodging establishments ⁶⁰
Annual Total of State Taxes	\$5,170,152	
Local Food and Beverage Tax	\$209,198	Spending at local restaurants and bars ⁶¹
Local Lodging Tax	\$222,720	Spending at local lodging establishments ⁶²
Annual Total of Local Taxes	\$431,918	

⁵⁸ "Questions and Answers on Sales/Use Taxes," *State of Rhode Island Division of Taxation*, 2013, <http://www.tax.ri.gov/help/faq.php>.

⁵⁹ State of Rhode Island Division of Taxation, in discussion with author, October 2013.

⁶⁰ "Rhode Island 44-18-36.1 – Hotel Tax" (Rhode Island Statutes and Codes, Rhode Island, 2011).; RI Division of Taxation, in discussion with author, October 2013.

⁶¹ "Questions and Answers Sales/Use Taxes," *State of Rhode Island Division of Taxation*.

⁶² "Rhode Island 44-18-36.1 – Hotel Tax" (Rhode Island Statutes and Codes, Rhode Island, 2011).

Cruise Ship Head Tax

Throughout the year, dozens of cruise ships travel to Newport. In addition to what is spent by passengers at local stores, restaurants, and attractions, and the taxes generated as a result of these expenditures, the City also collects a cruise ship head tax for all passengers aboard the ship. In 2012, nearly \$300,000 in head tax was collected by the City.⁶³

The Newport Mansions play a significant role in cruise lines' decision to choose Newport as a destination.

James Bonfield, Delivery Planning Manager at Cunard Cruise Line, states that "Newport is one of the more popular ports we go to with customers, after Quebec, New York and Boston." He lists "The Vanderbilts of Newport" and the "Grand Mansions of Newport" as two of the most popular shore excursions.⁶⁴

John Stoll, Vice-President at Land Programs at Crystal Cruises, also cites the Newport Mansions as a "big draw" for passengers, and therefore for the cruise line. He explained that Newport is integral to their Canada and New England cruises.⁶⁵

The Preservation Society, therefore, is responsible for some percentage of the cruise ship head tax that is collected by the City. There is, however, no definitive way of knowing what percentage of the tax collected is attributable to the Newport Mansions.

⁶³ Timothy Mills (Harbor Master, City of Newport), e-mail communication with author, January 2014.

⁶⁴ James Bonfield (Delivery Planning Manager, Cunard Cruise Line), e-mail communication with author, March 2014.

⁶⁵ John Stoll (Vice-President at Land Programs, Crystal Cruises), in discussion with author, March 2014.

Visitor Profile

The total economic impact of visitor spending in Newport is complemented by an analysis of the profile of Preservation Society visitors. When surveyed in 2010, distinct patterns emerged regarding the attributes of the average visitor. These characteristics provide insight into visitor travel patterns, spending habits, and the resultant impact these variables have on the local economy.

Reasons for Visit

When visitors were asked to rank the activities that influenced their decision to visit Newport, the vast majority (91.7%) identified the Newport Mansions as important to their choice of the City as a vacation destination.⁶⁶ A significant majority (81.6%) also identified dining, shopping, and nightlife to be important reasons for choosing Newport as a vacation destination.⁶⁷

This is *significant* because it demonstrates that visitors to the Newport Mansion have a high propensity to spend money at local restaurants, bars, and retail and souvenir shops while visiting Newport.

TABLE 7

Reason for Visit	Percent of Tourists that Consider the Activity to be "Important" to their Visit
<i>The Newport Mansions</i>	91.7%
The Cliff Walk and Ocean Drive	87.5%
Dining, shopping, and nightlife	81.6%
Other attractions and festivals	68.0%
Beaches and boating	59.1%

68

⁶⁶ 2010 Newport Mansions Visitor Study, 29.

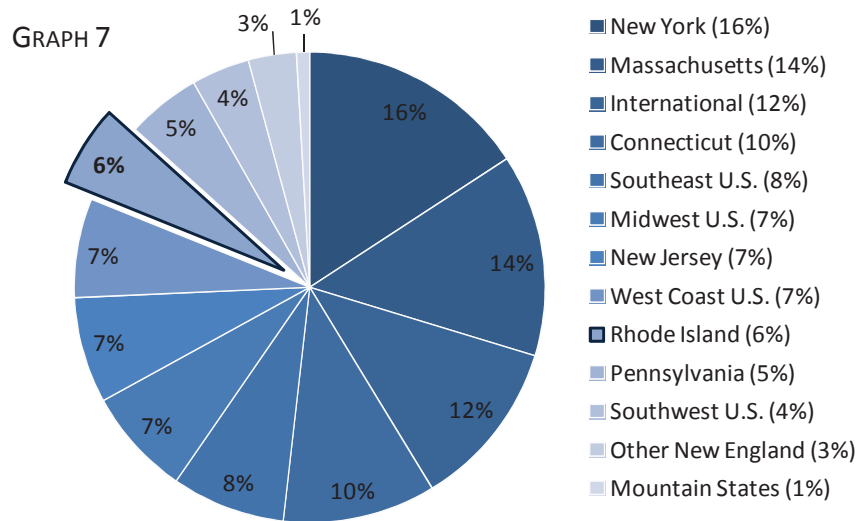
⁶⁷ Ibid.

⁶⁸ Ibid.

Visitor Origin

The vast majority of Newport Mansions visitors (94.4%) are from outside Rhode Island.⁶⁹

This is *significant* as it means that the money being spent in Newport by tourists is truly profit, rather than a reallocation of funds within the City's economy.

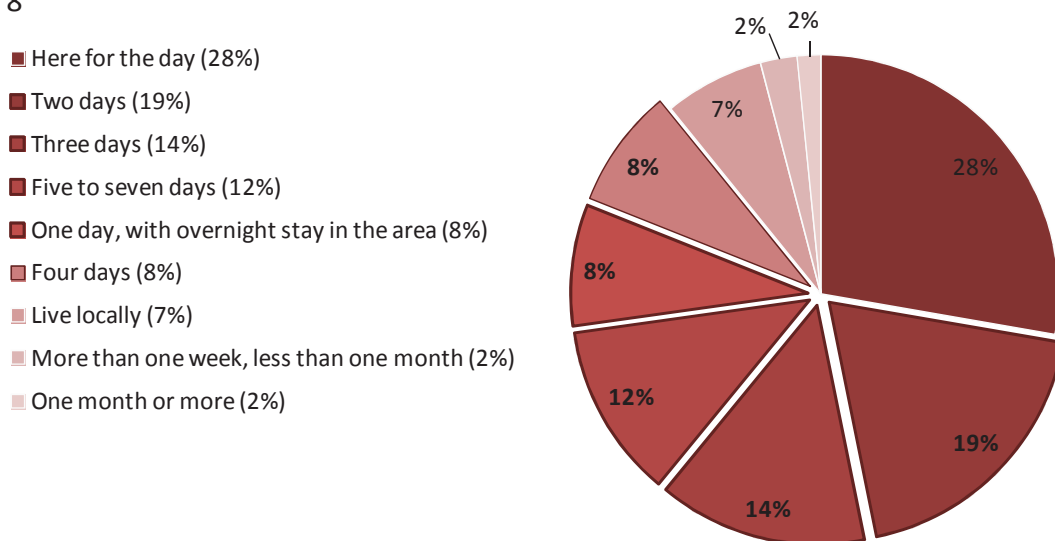


Length of Trip

Two thirds of Newport Mansions visitors (65.5%) make the Newport Mansions part of a larger trip, in which they stay “in the area” for two or more days.⁷⁰

This is *significant* as the longer tourists stay in the area, the more money they will spend in the local economy. Overnight visitors spend more money in the local economy due to the necessity of purchasing accommodations at local lodging establishments and meals at local restaurants or grocery and convenience stores. Visitors that stay overnight in Newport are also more likely to engage in other tourists activities that generate money for the local economy.

GRAPH 8



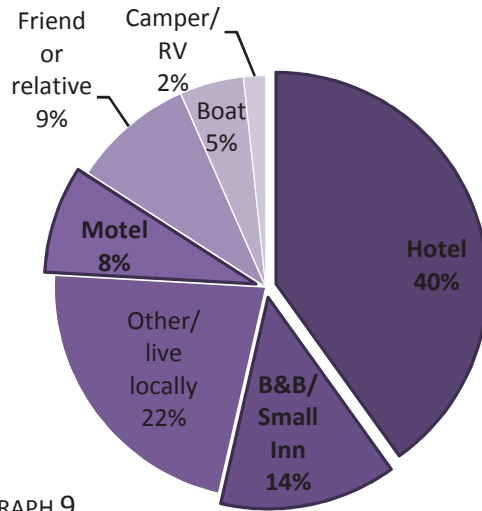
⁶⁹ Ibid.

⁷⁰ Ibid., 30.

Lodging

Of those Newport Mansions visitors staying overnight in the area, the majority (61.8%) stay in hotels (40.1%), bed and breakfasts or small inns (13.5%), and motels (8.2%).⁷¹

This is *significant* as it translates into income for the local hospitality business, which is the second largest sector within the local tourism industry drawing in an average of \$100 million in gross revenue annually.⁷²



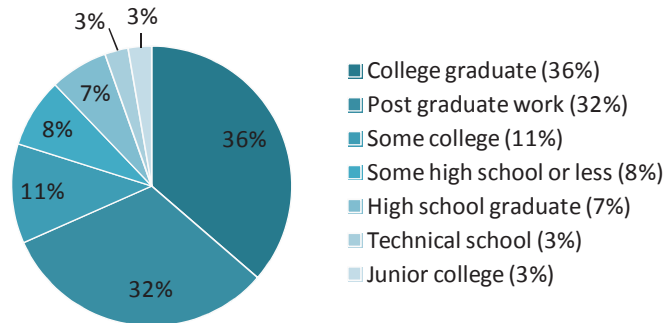
GRAPH 9

Background

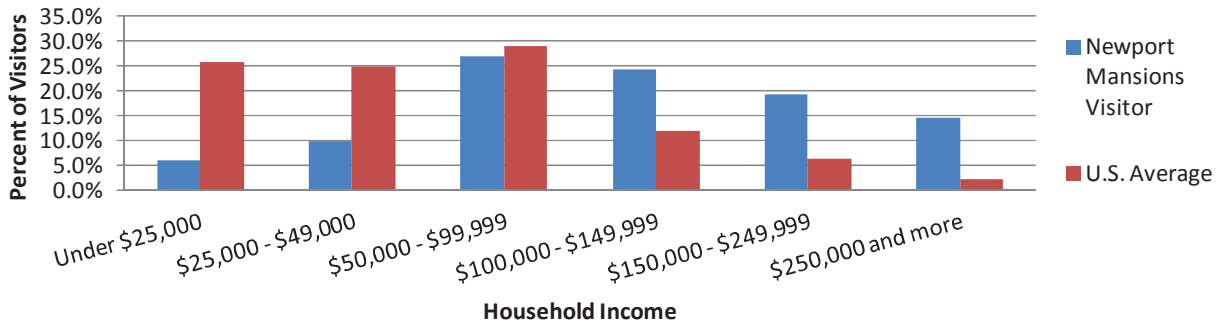
Newport Mansions visitors are largely “well educated, older and more affluent visitors.”⁷³ More than two-thirds of the Society’s visitors are college graduates, which is more than double the nation’s average of 28%.⁷⁴

This is *significant* as such visitors are more likely to stay longer in order to visit other local attractions and in turn spend more money at lodging establishments, restaurants, stores and other businesses in Newport.

GRAPH 10



GRAPH 11



⁷¹ Ibid.

⁷² Evan Smith (President & CEO, Discover Newport), in discussion with author, August 2013.

⁷³ 2010 Newport Mansions Visitor Study, 4.

⁷⁴ Ibid.; U.S. Census Bureau, Current Population Survey, 2012 Annual Social and Economic Supplement.

⁷⁵ Ibid., 32.; U.S. Census Bureau, Current Population Survey, 2012 Annual Social and Economic Supplement.

Quality of Life Contributions to the City and State

In addition to the various economic contributions, the Preservation Society is also an active contributor to the City's **quality of life**.

Sense of Place

Without the Preservation Society, the character and composition of Newport's landscape would be drastically different. If not for Society's initial preservation efforts, and the continual maintenance and protection of its historic structures, large swaths of the City's historic streetscapes and landscapes would not exist. It is Newport's historic resources that define the City and foster a strong sense of place, which not only draws in tourists but more importantly attracts and maintains residents.

Maintenance and Beautification

The Preservation Society's Properties Department lends expertise, staff time, and materials to assist in the maintenance and improvement of City- and community-owned property.

TABLE 8

Activity	Cost to the Preservation Society
Repair of the park benches at Touro Park in 1992 and 1998.	\$2,800
Assessment of window, roof and tower conditions at City Hall in 1993.	\$4,000
Repair of the columns, roof and concrete steps at Kings Park Gazebo in 1997, and the re-repair and re-painting of the columns in 1999/2000.	\$80,000
Repair of Cliff Walk tunnel under the Marble House Tea House.	\$50,000
Repair of the second floor porch and two windows at the Touro Street Fire Station in 2003.	\$8,000
Repair of iron fence at Washington Square in 2007 and 2009.	\$30,250
Consulting on the School Committee Board for Thompson Middle School.	\$9,000
Creation of an enclosure to assist the City's restoration of the bronze Statue in Equality Park.	\$10,000
Assessment of building conditions at Emmanuel Church and general assistance to the congregation regarding property improvements in 2013. ⁷⁶	\$6,000
Total	\$200,050

⁷⁶ Curt Genga (Director of Properties), in conversation with author, September and November 2013.

The Preservation Society’s Garden and Grounds Department contributes to various beautification initiatives throughout Newport.

TABLE 9

Activity	Cost to the Preservation Society
Daffodil planting initiative for seven years. ⁷⁷	\$74,100
Assembly of the Christmas Tree in Washington Square for twenty-five years. ⁷⁸	\$25,000
Planters along Broadway for five years.	\$1,250
Horse Trough planters in Washington Square for five years.	\$8,500
Hill Association garden at Touro Park in Spring of 2013. ⁷⁹	\$250
Maintenance of Coggeshall Cemetery for over twenty-eight years. ⁸⁰	\$78,400
Landscaping on Narragansett Avenue. ⁸¹	\$4,585
Total	\$192,085

⁷⁷ Jeff Curtis (Director of Grounds), in discussion with author, August and October 2013.

⁷⁸ David Leys (Vice-President, The Preservation Society of Newport County), e-mail communication with author, October 2013.

⁷⁹ Curtis, in discussion with author, August and October 2013.; Leys, e-mail communication with author, October 2013.

⁸⁰ Kathleen Martin (Assistant to the Director of Gardens and Grounds), e-mail communication with author, January 2013.

⁸¹ Curtis, in discussion with author, February 2014.

Cultural and Social Life

Through academic programs, special events, and curatorial work the Preservation Society fosters a culture of learning, fun and philanthropy in the community, which enhances the social and cultural life of Newport residents.

The Preservation Society hosts educational events throughout the year at a greatly reduced rate. These events, which include lectures, concerts, plays, student forums and hands-on workshops, are geared towards learners of all ages.⁸²

In addition to these regular events, the Preservation Society provides occasions on which local residents can enjoy the Newport Mansions free of charge.

Annually, the Preservation Society provides two days of free admission to all Newport County residents.⁸³

- In fiscal year 2013, 483 residents visited the Newport Mansions free of charge, equaling nearly \$5,000.⁸⁴

Every year during the holiday season the Preservation Society also provides free weekend admission to Newport Police and Fire Department members.⁸⁵

- In fiscal year 2013, nearly 500 residents visited the Newport Mansions, equaling approximately \$5,000.⁸⁶

⁸² Brittany Hullinger (Museum Affairs Coordinator), in discussion with author, October 2013.

⁸³ Rodman, in discussion with author, October 2013.

⁸⁴ Ibid.

⁸⁵ Ibid.

⁸⁶ Ibid.

The Preservation Society lends the Newport Mansions to businesses and organizations for special events, free of charge.

In calendar year 2012 the Preservation Society donated its facilities for **twenty-three events**, a contribution that equals **over \$220,000**.⁸⁷ Organizations that hosted at the Newport Mansions include:

- Community Committee for Boston Marathon bombing victim Heather Abbott, Bellevue Ochre Point Neighborhood Association, Victorian Society, Newport County Inns and Bed & Breakfast Association, Arts & Cultural Alliance, Newport County Convention and Visitors Bureau, Portsmouth Abbey, Island Moving Company, Preserve RI, Providence Business News, NewportFILM, Grace Ormonde, Alex & Ani, Brooks Brothers, Newport Life, National Trust Insurance Services/Freemans, and Rhode Island Mentorship.⁸⁸

The Preservation Society loans collection items to various institutions throughout Rhode Island. Institutions include:

- Newport Historical Society
- Whitehall
- White Horse Tavern
- Edward King House
- Admiral's Residence – War College
- The Glen⁸⁹

⁸⁷ Ware, e-mail communication with author, October 2013.

⁸⁸ Ibid.

⁸⁹ Paul Miller (Curator), e-mail communication author, January 2013.

Youth Education

Partnerships with Newport Schools

The Preservation Society partners with Newport public and private schools to provide unique educational opportunities that complement the school curriculum and enhance the overall learning of the City's youth.

In the eight months between January and October 2013, **414 Newport public school children** participated in educational programs free of charge.⁹⁰ Programs included:

- Tours at The Breakers with all 6th grade classrooms in Newport Public Schools,
- Tours at Marble House with all 5th grade classrooms in Newport Public Schools,
- Newport Art Night with middle school classrooms in Newport Public Schools,
- Landscape Design summer school program with Newport Public Schools,
- Study of Architecture at The Elms with Newport Child Opportunity Zone,
- Trim-a-Tree with 4th grade classrooms in Newport public and private schools.⁹¹

To support these offerings the Preservation Society provides funds to support the busing of Newport Public School children on field trips to the Newport Mansions.⁹²

In addition to these classroom programs, the Preservation Society partners with Rogers High School and the Metropolitan Regional Career and Technical Center to provide internships to high school students.⁹³

⁹⁰ Hullinger, in discussion with author, August and September 2013.

⁹¹ Ibid.

⁹² Ibid.

⁹³ Kate Botelho (Inventory Systems Coordinator), in discussion with author, December 2013.; Kaity Ryan (Manager of Preservation Policy), in discussion with author, October 2013.

Youth Services through Partnerships with other Organizations

The Preservation Society also partners with other non-profit organizations to provide youth programming within the City and throughout the State. The programs include:

- East Bay Community Action Program (EBCAP) – An organization that provides health and human services to residents of Rhode Island. Working with EBCAP, the Preservation Society hires youth to work for six weeks in different departments within the organization.⁹⁴
- Rhode Island Mentorship Partnership – An organization dedicated to expanding the quality of mentoring services for the State’s youth.⁹⁵ Preservation Society staff members take part, specifically, in the Aquidneck Island Mentor Program in which they dedicate an hour per week to mentor a local student.⁹⁶
- The Big Read - A National Endowment for the Arts program designed to encourage citizens of every age to read for pleasure. The Preservation Society acted as the lead agency for coordinating this initiative in Newport in 2010 and 2012.
- MUSE Program - A program developed by the Newport Art Museum that helps promote museum careers to high school students. The Preservation Society participates by offering the Newport Mansions as field trip locations.
- Rhody Ramble - An initiative designed by Preserve Rhode Island to bring awareness to historic preservation. The Preservation Society acts as part of a larger network of organizations that support the initiative.
- Summer reading – The Preservation Society helps RI State Libraries promote summer reading by providing free tickets to The Breakers to those students who complete their summer assignments.⁹⁷

Higher Education

The Preservation Society promotes the work of emerging scholars and practitioners through professional opportunities and partnerships with local institutions. These activities include:

- Sponsoring emerging scholars in the museum field through the Preservation Society’s Fellows Program,
- providing internships for college students from local universities such as Salve Regina University, Roger Williams University, and the Community College of Rhode Island,
- providing funding for a college intern to work in the City’s Zoning Office, and
- partnering with Roger Williams University to conduct a course on heritage stewardship.⁹⁸

⁹⁴ “About,” *East Bay Community Action Program*, 2014, <http://www.ebcap.org/About/About/tabid/147/Default.aspx>; Jan Doda (Human Resources Manager), in discussion with author, December 2013.

⁹⁵ “About Us,” *Rhode Island Mentoring Partnership*, 2007, <http://www.mentorri.org/about-us.htm>.

⁹⁶ *Ibid.*; Barbara Shea (Tourism Marketing Manager), in discussion with author, December 2013.

⁹⁷ Hullinger, in discussion with author, August and September 2013.

⁹⁸ Hullinger, in discussion with author, August and September 2013.; Botelho, in discussion with author, December 2013.

Sponsorships and Underwriting

The Preservation Society helps support various organizations and initiatives throughout the City, including:

- Women in Business: Newport County Chamber of Commerce
- Travel and Event Guide of the Newport County Chamber of Commerce
- Discover Newport Visitor Guide
- State Tourism Visitor Guide
- Newport Harbor Guide
- Newport in Bloom
- Navy Choristers Program
- Newport Rotary Club
- Newport Polo
- The Women Run: Sanity Chase event
- Newport Police Parade⁹⁹
- Bike Newport: Newport Bicycle Map
- Bike Newport: Bike to Work Day¹⁰⁰
- “Adopt-a-Spot”: City of Newport¹⁰¹

On an annual basis the Preservation Society provides a total of over **\$20,000** to these organizations.¹⁰²

⁹⁹ Rodman, in discussion with author, October 2013.

¹⁰⁰ Laura Murphy (Educational Sales Manager), in discussion with author, January 2013.

¹⁰¹ Leys, e-mail communication with author, October 2013.

¹⁰² Rodman, in discussion with author, October 2013.

Fundraisers

The Preservation Society helps support charities throughout the City and State by donating resources for fundraisers held by various organizations. Donations include:

- Guest passes to the Newport Mansions and Preservation Society merchandise, which has an annual value of \$4,000,¹⁰³
- flowers and greens for the Edward King House Senior Center’s annual fundraiser for twenty years, which has an annual value of \$1,000, and
- a Turkish Oak for an Aquidneck Land Trust fundraiser, which had a value of \$1,000.¹⁰⁴

Additional Donations

- The Preservation Society’s Gardens and Grounds Department donates produce from its vegetable garden to Lucy’s Hearth, a women’s shelter in Middletown.¹⁰⁵
- The Gardens and Grounds Department also donates twenty to thirty poinsettias to the Ancient Order of Hibernians for their family Mass each year.¹⁰⁶
- Annually the Garden and Grounds Department adopts a family through Child and Family Services and each employee purchases, wraps, and donates toys for the family.¹⁰⁷
- The Breakers Greenhouse is donated as a workspace for Lucy’s Hearth volunteers to create holiday wreaths for the organization’s annual fundraiser.
- The Preservation Society’s Special Events Department donates floral arrangements to Grand Islander Nursing Home and Newport Hospital.¹⁰⁸

¹⁰³ Pat Dias (Marketing/Sales Support Specialist), e-mail communication with author, January 2013.

¹⁰⁴ Curtis, in discussion with author, January 2014. The estimate is based on sales of similar sized trees at area nurseries.

¹⁰⁵ Jim Donahue (Horticulturist), e-mail communication with author, September 2013.

¹⁰⁶ Paul McGrady (Properties Supervisor), e-mail communication with author, December 2013.

¹⁰⁷ Martin, e-mail communication with author, January 2013.

¹⁰⁸ Philip Pelletier (Director of Special Events), e-mail communication with Kaity Ryan, October 2013.