

OFFICE *of the* MANHATTAN BOROUGH PRESIDENT
and
the SOHO TOURISM COUNCIL

A REPORT ON *T*OURISM IN SOHO

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RUTH W. MESSINGER
BOROUGH PRESIDENT

May, 1994

Tourism is a major growth industry for New York City. Each year, tourism generates approximately \$14 billion in economic activity and provides 131,000 jobs. By the year 2000, tourism's economic impact is expected to reach \$20 billion. A diverse combination of attractions and destinations in New York City, old and new, large and small, attracts about 24 million visitors annually.

While well-known sights such as the Statue of Liberty and the Empire State Building attract first-time visitors to the City, we need to provide visitors with reasons to make repeat visits or to extend their stays in the City. The unparalleled diversity found in our neighborhoods offers just such reasons. In Manhattan alone, visitors can tour the homes of great American figures such as George Washington and Theodore Roosevelt, trace the routes of 19th century immigrants, enjoy the contemporary theater and cultural performances of Chelsea, browse in more than 200 galleries in SoHo, or enjoy the jazz clubs of Harlem.

Through the SoHo Tourism Council, that community's arts and cultural organizations, retail businesses, and residents have joined forces to develop and implement their own tourism strategy. This report, the first phase of that effort, clearly shows the significance of SoHo in New York City tourism and identifies opportunities for growth. It also demonstrates the value of public-private partnerships in developing and marketing our neighborhoods as tourist destinations. Ultimately, residents and local businesses benefit from the flow of tourist dollars into the community, sights and attractions benefit from increased audiences, and visitors benefit from an enhanced tourism product.

I look forward to working with the Council in this effort.

Ruth W. Messinger
President, Borough of Manhattan

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TABLE OF CONTENTS

Executive Summary	1
Introduction	2
Purpose/Goals of the Survey	3
Methodology	3
Profile of Visitors	4
Residence	4
Age	5
Education Level	5
Income Level	6
Ethnic Background	7
Frequency of Visits to SoHo	7
Length of Stay	8
Where Do Visitors Stay?	8
Purpose of Visit	8
New York City Residents	9
Out-of-Towners	11
How Do Visitors Learn of SoHo Activities and Events?	14
Comparison of SoHo to Other Neighborhoods	15
Safety in SoHo	15
SoHo Would Have Been More Enjoyable If...	15
Economic Impact	16
Conclusion	18
The Guggenheim Museum Survey	21
SoHo Tourism Council	22
References	24

EXECUTIVE SUMMARY

SoHo is a popular destination for many people from both the metropolitan region and around the world. In an effort to expand the economic impact of tourists in this area, this study examines the demographics of tourists to SoHo, their interests, and their economic impact. The major findings of this report are:

- 43.8 percent of out-of-towners cited SoHo as an important factor in their decision to visit New York City;
- SoHo has a very high repeat visitation rate, with 71.3 percent of out-of-towners visiting SoHo between one and ten times in the past twelve months;
- shopping, browsing, and dining were among the top reasons for visits to SoHo;
- out-of-towners spent an average of \$160 and New York City residents spent an average of \$128 per day when visiting SoHo;
- visitors are fairly affluent, with a median income of \$48,000 for New York City residents and \$50,000 for out-of-towners;
- visitors to SoHo are well-educated, with 39.2 percent at the college level and 35 percent at the graduate level;
- visitors are fairly young, with 31.5 percent of respondents between the ages of 25 and 34;
- 50.4 percent of visitors hear about SoHo from friends or through word of mouth;
- the average length of stay in SoHo was three hours; and
- the average group size was two people.

INTRODUCTION

The area which is today known as SoHo ("South of Houston") was originally an industrial manufacturing area. During the 1960's, as industrial manufacturing moved to other locations in the region, artists who were attracted by the large, abandoned and inexpensive lofts moved into SoHo. SoHo has evolved into a vibrant community which has become a mecca not only for artists but also for visitors interested in exploring the community's distinct cast iron architecture and diverse attractions. It is home to more than 263 galleries¹, 188 eating and drinking establishments², numerous retail shops, museums, and cultural organizations. To preserve its historic character, much of SoHo was designated the "SoHo/Cast Iron Historic District" by the New York City Landmarks Preservation Commission in 1972.

In recent years, SoHo has increasingly gained attention as a visitor destination for both New Yorkers and out-of-towners. In order to better understand the changing nature of the community and the impact and economic potential of tourism, Manhattan Borough President Ruth W. Messinger and her staff met with representatives from the area's arts and cultural organizations, galleries, restaurants and residential community in spring, 1993, to discuss tourism's potential for encouraging greater economic development in SoHo.

From this initial meeting, the SoHo Tourism Council was established in March, 1993. The Council seeks to present SoHo as a destination for both New Yorkers and visitors by:

- developing a coordinated tourism marketing strategy to attract visitors and to encourage business activity;
- fostering cooperative efforts among cultural and arts organizations, businesses and the community; and
- developing projects that improve the image of SoHo and the quality of experience for visitors.

¹The Arts as an Industry: Their Economic Importance to the New York-New Jersey Metropolitan Region. The Port Authority of NY & NJ. October 1993.

²Statistic from the New York State Department of Labor and the Port Authority of New York and New Jersey. 1992.

PURPOSE/GOALS OF THE SURVEY

In order to better understand the economic impact of SoHo's visitors and their needs, the Office of the Manhattan Borough President, in conjunction with the SoHo Tourism Council, conducted a survey of visitors to SoHo in July, 1993. The survey was designed to:

- learn the demographics of visitors to SoHo;
- find out why they chose to visit SoHo; and
- examine the economic impact of out-of-town visitors on New York City's economy.

Results from the survey will assist the SoHo Tourism Council in developing an appropriate tourism development strategy to address the needs of its visitors as well as its residents.

An earlier survey of SoHo was conducted by the Solomon R. Guggenheim Museum from October 4 through October 12, 1991. Some of the data on visitor demographics and preferences collected are included in this report and are compared to the results of the Manhattan Borough President Office's (MBPO) survey³.

METHODOLOGY

Two surveys were developed for the MBPO study -- one for New York City residents and one for out-of-towners. While both surveys were nearly identical, the survey for out-of-towners included additional questions about length of stay in New York City, type of accommodations used in New York City, whether visiting SoHo influenced their decision to visit New York City, and the amount of money spent in New York City. In addition, only United States residents were asked their ethnic background. (See Figure 1 for survey questionnaire.)

³The comparison of the two surveys is useful because they were conducted during different seasons and provide insight into the seasonality of visitation patterns in SoHo. For example, during the summer months of July and August, galleries are generally closed; thus, visitors who primarily visit SoHo for its galleries would generally visit them during the spring, fall or winter months. Additionally, summer appears to be a relatively strong season for overnight visitors to New York City. This is reflected in the relatively large number of out-of-towners interviewed in the MBPO survey.

The survey was administered by 50 volunteers⁴ from July 14 through July 26, 1993, each day from 12 noon until 8:30 pm. The volunteers randomly approached people, explained that the survey was conducted for the SoHo Tourism Council, interviewed the subjects and recorded their answers. The interview sites were located at the intersections of: Prince and Broadway, Spring and West Broadway, Spring and Broadway, and Broome and West Broadway. These locations were chosen for their high traffic volume and their proximity to clusters of retail establishments, restaurants, cultural organizations and subway stations. (See Figure 2 for map.)

About one in five people who were approached by an interviewer actually responded to the survey questionnaire. In many cases, those who refused to answer the survey said that they were in a hurry or indicated that they did not speak English.

Approximately 700 surveys were completed; of that number, 654 were usable. For tabulations in this survey, people who work and/or live in SoHo (zip code 10012) were excluded⁵. The margin of error for this sample size is approximately ± 3.5 percent.

PROFILE OF VISITORS

An equal number of men and women were interviewed in the survey.

Respondents were asked the number of people in their group. Approximately 37 percent responded that they were in SoHo by themselves, while another 42 percent replied that their group consisted of two people. 20 percent replied that their group consisted of three to six people.

Generally, respondents did not visit SoHo with children under the age of 12. Only 2 percent of New York City residents and 1 percent of out-of-towners were accompanied by children.

RESIDENCE

The respondents were almost evenly divided between New York City residents and out-of-towners. Of the total group of respondents, 29.6 percent were from Manhattan, 18.2 percent were from Brooklyn, Bronx, Queens, Staten Island, 16.6

⁴The volunteers were recruited from Big Apple Greeter, a program of the Manhattan Borough President's Office which pairs tourists with local residents and enables them to see New York City through the eyes of a native New Yorker.

⁵Data from the Guggenheim survey includes people who work and/or live in SoHo.

percent were from the tri-state region (Connecticut, New Jersey, New York State), 15.1 percent were from other U.S. states, and 18.7 percent were from foreign countries.

10 percent of total respondents resided and/or lived in SoHo (zip code 10012).

Visitors from twenty-eight states, Puerto Rico, and the District of Columbia are counted in this survey. These states are: California, Connecticut, Delaware, Florida, Georgia, Illinois, Iowa, Kansas, Maryland, Massachusetts, Michigan, Minnesota, Nebraska, New Jersey, North Carolina, North Dakota, Ohio, Oklahoma, Oregon, Pennsylvania, South Carolina, South Dakota, Tennessee, Texas, Utah, Virginia, Wisconsin, and New York.

International visitors from twenty-eight countries were counted in this survey. The largest number of international visitors came from Germany and France, with other international visitors coming from Finland, England, Scotland, Austria, Sweden, Spain, Italy, Denmark, Holland, Norway, Ireland, Ukraine, Taiwan, Israel, Australia, Poland, Switzerland, Canada, Slovenia, Belgium, Japan, Hong Kong, Argentina, Brazil, Chile and Mexico.

In the Guggenheim survey, more respondents resided in Manhattan (51 percent) than in the MBPO survey (29.6 percent). Also, the number of international visitors in the MBPO survey (18.7 percent) was greater than those in the Guggenheim survey (6 percent). However, the number of visitors from the other four boroughs, the tri-state region and other U.S. states in both surveys was similar. (See Figures 3a and 3b for comparisons.)

AGE

The average age of all respondents was 50; the median age was 34. About one-third of all respondents were between the ages of 25 and 34.

Comparisons between the MBPO survey and the Guggenheim survey show that both groups of respondents fell within similar age ranges. However, the MBPO survey documented almost 12 percent more respondents who were 45 years of age and older. (See Figure 4.)

EDUCATION LEVEL

The majority of the respondents were well-educated (defined as having received at least a college degree), with 39.2 percent holding a college degree and 35 percent having done post-graduate work or received a post-graduate degree. A

comparison with the Guggenheim survey⁶ shows that respondents were similarly well-educated. (See Figure 5.)

INCOME LEVEL

Visitors to SoHo appear to be significantly more affluent than the average New York City visitor; the New York City tourist's mean annual income is \$40,000⁷. MBPO survey respondents reported a mean income of \$52,100 for New York City residents and \$53,900 for out-of-towners. (The median income for New York City residents was \$48,000 and \$50,000 for out-of-towners.) 22.8 percent of all respondents reported that they earn \$75,000 or more per year. (See Figure 6.)

A comparison of income levels of the respondents in the Guggenheim and MBPO surveys was not made because the structure of this question in each survey was different. The following table shows the income levels of the Guggenheim survey respondents:

Guggenheim Survey - Total Family Income	
Less than \$15,000	9.0%
15,000 - 25,000	16.0
25,000 - 35,000	21.0
35,000 - 45,000	13.0
45,000 - 50,000	6.0
50,000 - 75,000	13.0
75,000 - 100,000	10.0
100,000 or more	11.0

⁶It should be noted that the Guggenheim survey specifically asked respondents the highest level of educational attainment, whereas the MBPO and NYC domestic leisure visitor surveys did not.

⁷Domestic Leisure Travel to New York City. New York Convention & Visitors Bureau, Inc. June 1992.

ETHNIC BACKGROUND⁸

A comparison of the ethnic background between New York City residents and out-of-towners surveyed in SoHo, residents of Community District 2 (which includes SoHo) and New York City residents is shown below:

Ethnicity	SoHo Survey - NYC Residents	SoHo Survey - Out-of-towners	Community District 2 ⁹	New York City ¹⁰
Caucasian	73.4%	83.3	78.0	43.2
African Am.	10.8	6.3	3.1	25.2
Asian Am.	7.7	6.3	12.3	6.7
Latino	6.9	3.6	6.3	24.2
Native Am.	0.4	0	0.1	0.2
Other	1.2	0.5	0.1	0.3

FREQUENCY OF VISITS TO SOHO

68.5 percent of out-of-towners and 80.4 percent of New York City residents had previously visited SoHo. (See Figures 7a-d.)

Similarly, the Guggenheim survey found that 94 percent of respondents had previously visited SoHo, whereas 81 percent of the respondents of the MBPO survey had previously visited SoHo.

A high level of "intent to return" to SoHo shows that SoHo itself is an attractive destination with relatively high repeat visitation. 97 percent of out-of-towners in the MBPO survey indicated an intent to return to SoHo at a future time. In comparison, almost 55

⁸Only U.S. residents were asked their ethnic background in the MBPO survey.

⁹Demographic Profiles: A Portrait of New York City's Community Districts From the 1980 & 1990 Censuses of Population and Housing. City of New York Department of City Planning report. August 1992.

¹⁰Department of City Planning report

percent of the New York City hotel guests indicated that they planned to return to New York City at a future time¹¹.

LENGTH OF STAY¹²

The average length of stay in SoHo for all respondents, excluding day trippers, was three hours. (Including day trippers, the average length of stay in SoHo is almost four and one-half hours.) A total of 26.6 percent of respondents spent three to five hours in SoHo, while only 7.4 percent spent less than one hour.

Out-of-towners (excluding day trippers) were also asked their length of stay in New York City. A total of 41 percent spent from one to seven nights in New York City, while 28 percent spent one week or more in New York City.

WHERE DO VISITORS STAY?

About 52 percent of out-of-towners stayed in hotels or motels while 48 percent stayed with friends or relatives. While those who stayed in hotels or motels are able to hear about tourist activities through regular tourist channels (such as hotel concierge desks and brochure displays stands), those who stay with friends or relatives will more likely rely on friends or relatives to inform them of current activities and events. Thus, reaching those who stay with friends or relatives may require a greater effort in increasing publicity about SoHo at the local level.

PURPOSE OF VISIT¹³

70.8 percent of New York City residents and 61 percent of out-of-towners visited SoHo with a single activity or purpose in mind. However, they also indicated that they participated in other activities once they arrived in SoHo. It would appear that the multitude

¹¹Domestic Leisure Travel to New York City. New York Convention & Visitors Bureau, Inc. June 1992.

¹²These figures exclude day trippers.

¹³It should be noted that the question regarding the primary reason for being in SoHo was incorrectly answered. Instead of selecting one answer as requested, many people selected multiple answers for this question. About 16% of the New York City respondents incorrectly answered this question; 31.7% of the non-New York City respondents incorrectly answered this question. These answers were separately counted.

of diverse activities located in this area (such as restaurants, shopping, visiting galleries, etc.) and the attraction of the neighborhood itself persuades visitors to spend more time in SoHo than they originally intend, with 20.8 percent of all respondents citing "wandering/browsing" as the primary purpose of their visits.

It is also interesting to note that despite its wealth of arts and cultural organizations, SoHo has become one of the City's retailing centers. Retail offerings draw shoppers to SoHo from both the region and from throughout the world.

NEW YORK CITY RESIDENTS

New York City residents were asked to indicate the primary reason for their visit to SoHo. Respondents were asked to select only one answer from a prepared list of responses. Almost one-third (31.1 percent) identified shopping as the primary reason for their visit, while 24.2 percent replied that they were in SoHo to browse or were passing through the area. A list of these responses is shown below:

Primary Reason for SoHo Visit	Percent Reporting
shop	31.1%
pass by/browse/wander	24.2
visit museums	14.4
dine in restaurants	14.4
visit galleries	10.6
visit other cultural organizations	3.8
organized tour	0.8
other	0.8

New York City residents were also asked what other activities, if any, they participated in while in SoHo. Their responses are as follows:

Activities While in SoHo¹⁴	Percent Reporting
shop	45.7%
dine in restaurants	45.0
pass by/browse/wander	44.2
visit galleries	24.5
visit museums	23.0
other	13.8
visit other cultural organizations	2.6

¹⁴Multiple responses were allowed for this question.

OUT-OF-TOWNERS

Out-of-towners were asked to indicate the primary reason for their visit to SoHo. Respondents were asked to select only one answer from a prepared list of responses. Almost one-third (29.1 percent) indicated that the single primary reason for their visit was to browse or pass through the area. However, 22.4 percent replied that their primary purpose in SoHo was to shop, while 13.8 percent indicated that they came to SoHo primarily to visit galleries. A list of these responses is shown below:

Primary Reason for SoHo Visit	Percent Reporting
pass by/browse/wander	29.1 %
shop	22.4
visit galleries	13.8
dine in restaurants	10.7
visit museums	9.2
other	2.6
visit other cultural organizations	2.0
organized tour	0.5

As with New York City residents, the out-of-towners were also asked what activities, if any, they participated in while in SoHo. Their responses are as follows:

Activities While in SoHo¹⁵	Percent Reporting
pass by/browse/wander	58.0%
shop	55.8
dine in restaurants	54.2
visit galleries	47.8
visit museums	33.0
other	6.4
visit other cultural organizations	1.9

It is apparent that New York City residents and out-of-towners visit SoHo for different reasons. While New York City residents stated that shopping was their primary reason to be in SoHo, out-of-towners stated that they were primarily in SoHo to browse. Nonetheless, the second most popular reason for visiting SoHo for New York City residents was browsing, while for out-of-towners that activity was shopping. Any marketing strategies should take into account the preferences of both New York City residents and out-of-towners who visit SoHo.

¹⁵Multiple responses were allowed for this question.

A comparison of the top five primary reasons for visiting SoHo is shown below:

Primary Reason for SoHo visit ¹⁶	New York City residents	Out-of-towners
shop	31.1%	24.9%
browse/wander	24.2	32.2
visit museums	14.4	10.2
dine in restaurants	14.4	11.9
visit galleries	10.6	15.3

It is also interesting to note that while galleries were typically closed during the months of July and August, a significant number of total respondents indicated that their primary reason for being in SoHo was the galleries. (It should be noted that a small number of galleries remain open during the summer.) Dining was also a popular activity for SoHo visitors.

In the Guggenheim survey, respondents were asked what activities they participated in while in SoHo. 56 percent of respondents answered that they visited galleries when in SoHo, 53 percent shopped and 49 percent dined out. Also, 51 percent answered that they wandered or browsed while in SoHo.

In comparison, 51.1 percent of total respondents of the MBPO survey indicated they shopped when in SoHo, 51.6 percent browsed or wandered around and 49.9 percent dined in restaurants. Visiting galleries was not as popular an activity for the MBPO survey respondents as it was for the Guggenheim survey respondents. That both surveys also report shopping as a popular activity indicates SoHo's development from an area known solely for the arts to one where retail plays an increasingly important role. From 1969 to 1992, the number of retail clothing shops in SoHo increased by 405 percent¹⁷. The disparity in the types of activities visitors participate in when in SoHo reflects the seasonality of visitor patterns and types of available activities in SoHo.

¹⁶These figures exclude those who live and/or work in SoHo.

¹⁷Statistic from the New York State Department of Labor and the Port Authority of New York and New Jersey. 1992.

The following table compares the types of activities in which visitors participate as recorded in the MBPO survey and the Guggenheim survey:

Activities While in SoHo ¹⁸	MBPO Survey July, 1993 (641)	Guggenheim Survey October, 1991 (341)
visit galleries	37.0%	56.0%
shop	51.1	53.0
wander/browse	51.6	51.0
dine in restaurants	49.9	49.0
work in area	n/a	34.0
visit museums	28.4	23.0
live in area	n/a	19.0
attend movies/plays	n/a	15.0
other	9.8	11.0
organized tours	n/a	3.0
visit other cultural organizations	2.2	n/a

HOW DO VISITORS LEARN OF SOHO ACTIVITIES AND EVENTS?

A large number of total respondents (50.4 percent) indicated that they heard about events and activities in SoHo through friends or word of mouth. Another 16 percent heard from previously residing in or visiting SoHo and the surrounding areas. Only 11.7 percent of all respondents indicated that they learned about SoHo events from newspapers and magazines, while 11.5 percent collected information from travel books and guides. For out-of-towners, however, 21.1 percent indicated that they found out about SoHo activities and events through travel books and guides. As it appears that out-of-towners rely on these resources to some extent, it would be advantageous to target travel writers in all types of media as part of a SoHo marketing effort. (See Figure 8.)

In response to an open-ended question about how they would like to learn about SoHo events and activities, 28 percent of all respondents made the following suggestions: more local advertising in various media including radio, television, newspapers and magazines; SoHo newsletter; community billboard/information kiosk; events calendar; posted information

¹⁸Multiple responses were allowed for this question.

at transportation centers including subways, PATH trains and airports; and distribution of information at embassies and consular offices.

COMPARISON OF SOHO TO OTHER NEIGHBORHOODS

Respondents were asked how their experiences in SoHo compared to that of other New York City neighborhoods¹⁹. Almost 89 percent of all respondents gave positive responses, while only 4.9 percent gave negative responses. About 7 percent replied that SoHo was similar or comparable to other neighborhoods.

Positive responses included:

"....cleaner, more stores....more charming than most others, quaint....excellent....favorite part of city....no high buildings, more laid backmore culture, can identify with people, more young families....I like it, it's trendy....nicer to walk around....very interesting, funky....like atmosphere, like a small town....lively, good shops, friendly people....dogs allowed in store...."

Negative responses included:

"....interesting, but pretentious....Lower East Side has a lot more character; I like SoHo restaurants, the Bohemian atmosphere but it's a little too sophisticated....too commercial....crowded, vendors annoying...."

SAFETY IN SOHO

About 89 percent of all respondents indicated that safety and security were not a concern when deciding to visit SoHo. Out-of-towners appeared to be only slightly more concerned about safety in SoHo, with approximately 27.8 percent indicating that safety was a concern as compared to about 13 percent of New York City residents. Those who regarded safety as a concern cited theft, assault and harassment as their three main concerns.

SOHO WOULD HAVE BEEN MORE ENJOYABLE IF...

Respondents were asked what would have made their visit to SoHo more enjoyable. From a prepared list of answers, the top five responses were: public toilets (42.8 percent),

¹⁹Similar responses to this open-ended question were given by both New York City residents and out-of-towners.

signs to identify sites (27.7 percent), area maps/brochures (25.6 percent), cleaner streets (24.2 percent), and pedestrian walkways (22.4 percent). The 22 percent who chose "other" said that the following items would have enhanced their visit to SoHo: more trees; more green space, benches or sitting space; more parking; lower prices; more pay phones; more street entertainment; bike racks; bike paths; a hotel; longer store hours; earlier store hours; less graffiti; more street lights; less peddlers; more kids activities; water fountains; fewer tourists; more outdoor cafes; and more police²⁰. (See Figure 9.)

ECONOMIC IMPACT

Out-of-towners were asked how much they spent (or planned to spend) on their visit to New York City. The average spending on this trip per respondent was \$1045, with an estimated economic impact of \$1432²¹. (New York City residents were not asked this question.)

The average amount spent in SoHo by out-of-towners was \$160; for New York City residents, the average amount spent was \$128. (See Figure 10.)

Approximately 44 percent of the out-of-towners indicated that visiting SoHo was an important factor in their decision to visit New York City. The average spending on this trip per respondent was \$1223, with an estimated economic impact of \$1676. This amount is slightly higher than the average spending for visitors to New York City, indicating that SoHo attracts visitors who are more likely to spend money and is consistent with the earlier findings of income levels of visitors to SoHo.

In decision to visit NYC, SoHo is ... (figures exclude day trippers)	
	Percent Reporting
very important	26.2%
important	17.6
somewhat important	24.2
not important	28.9
no opinion	2.7

²⁰Similar responses were given by both New York City residents and out-of-towners.

²¹The multiplier of 1.37 is provided by the New York Convention & Visitors Bureau, Inc.

It is not yet possible to determine accurately the total economic impact of tourism on SoHo or SoHo's contribution to the tourism industry because data on the total number of visitors to SoHo is not available.

However, anecdotal information suggests that this impact is very significant. For example, the Port Authority estimates that direct expenditures of the commercial art galleries and auction houses generated \$840 million in total economic activity in 1992. Of the 497 commercial art galleries located in New York City and the metropolitan region, 53 percent are located in SoHo²². Additionally, more than 188 eating and drinking establishments, 101 retail apparel stores, over 50 miscellaneous retail businesses (including specialty arts and crafts shops, food merchandise markets, bookshops, jewelry stores, etc.), 30 antique shops, 17 home and office furniture stores, and five museums are located in SoHo.

Employment figures for the establishments mentioned above indicate that SoHo's tourism-related businesses were significant employers in a broad range of industries in 1992. Commercial art galleries employed about 800 people (full time equivalent). Eating and drinking establishments employed approximately 2,356 people; miscellaneous retail businesses employed nearly 881 people; retail clothing stores employed about 765 people; and museums and other cultural institutions employed about 85 people²³. Employment in these categories has grown dramatically over the past ten years. The following table shows the movement of manufacturing out of SoHo and a growing trend toward a consumer- and retail-oriented economy²⁴.

Changes in Employment and Economic Activity, 1980-1990						
	1980		1990		Percent Change	
	# Firms	# Employees (full time)	# Firms	# Employees (full time)	Firms	Employees
Manufacturing	514	11,503	220	4,698	-57%	-59%
Eating & Drinking	146	1,438	185	2,557	+27	+78
Misc. Retail	86	325	196	1,113	+128	+242
Retail Apparel	41	268	81	954	+98	+256

²²The Arts as an Industry: Their Economic Importance to the New York-New Jersey Metropolitan Region. The Port Authority of NY & NJ. October 1993.

²³Statistics from the New York State Department of Labor and the Port Authority of New York and New Jersey. 1992.

²⁴Statistics from the New York State Department of Labor and the Port Authority of New York and New Jersey. 1992.

The growth in number of commercial art galleries has also been tremendous. In 1982, there were 121 galleries in SoHo. In 1992, this number had risen to 263, a 117 percent increase²⁵.

CONCLUSION

It is apparent that visitors to SoHo, whether they are from out-of-town or from other parts of New York City, enjoy SoHo. While this area is typically known for its galleries and art, shopping and dining ranked high in visitors' preferences. Additionally, window shopping/wandering/browsing also appealed to these visitors.

Findings from the Guggenheim survey also indicate similar visitor preferences regarding SoHo. The most popular activities were visiting galleries, shopping, browsing/wandering, and dining in restaurants. Visiting museums also appealed to this group, but to a lesser extent.

Results from both the Guggenheim and MBPO surveys reflect different visitor preferences during various seasons. For example, the Guggenheim survey, which was conducted in the fall, found that the majority of their respondents were in SoHo to visit galleries. The fall also happens to be a season in which many galleries open new exhibitions. At the same time, visiting galleries was a fairly low priority for respondents in the MBPO survey, which was conducted in the summer when many galleries are closed.

Demographics of the respondents of both surveys, however, were similar. Respondents were affluent, well-educated, and also somewhat familiar with the SoHo area as the majority of those surveyed in both studies indicated that they had previously visited SoHo. This general portrait of a visitor to SoHo and his/her likes and dislikes could aid in future marketing and audience outreach efforts for the community.

Nevertheless, some issues regarding SoHo's viability as a destination arose. These issues involved the dissemination of information, both locally and beyond, about the community and its events and visual signage and directions for visitors unfamiliar with the area. Other issues raised dealt with infrastructure matters such as the expansion of green space/park space, and sitting areas, placement of water fountains and street lights, and construction of a hotel.

²⁵The Arts as an Industry: Their Economic Importance to the New York-New Jersey Metropolitan Region. The Port Authority of NY & NJ. October 1993.

The following recommendations address some of these issues:

- *Develop a free publication informing and guiding visitors in SoHo.*

Existing visitor maps are sold in bookstores and other locations. However, a publication available to visitors before they arrive in New York City and before and after they arrive in SoHo would be more convenient for visitors seeking information about SoHo. The distribution locations should include visitor information centers, hotel concierge desks in New York City, New York Convention & Visitors Bureau branches nationwide and overseas, and U.S. travel offices abroad.

- *Market SoHo as a unique retail experience.*

While the attraction of SoHo's art galleries and art-related organizations can not be surpassed, it is evident that specialty retailing has gained increasing significance. For example, over thirty antique stores and numerous home furnishing shops are located in SoHo. There are also many designer clothing boutiques for men and women, as well as specialty retail stores for items not found elsewhere in the City. Marketing this retail aspect of SoHo, along with the art galleries, could bring in a broader audience. In addition, highlighting SoHo's retail aspect during the off peak seasons of art galleries could stimulate visitation year-round.

- *Create visual signage, maps, and/or an information kiosk or center in SoHo.*

SoHo, New York City, is well-known throughout the world. However, some visitors arrive in SoHo without knowing what activities are available or even how to find their way around. For example, many of SoHo's art galleries and not-for-profit art spaces are located in multi-story buildings and not at street level. In addition, information about the historic cast iron buildings could be made more accessible to visitors. Providing street level signage and directions could facilitate visits by encouraging visitors to explore more of SoHo and to make longer and/or repeat visits to SoHo. It could also help to magnify the diversity of specialty retail shops located in SoHo.

- *Develop promotions using storefront windows.*

With a significant group of respondents (20 percent of all respondents) indicating that they come to SoHo primarily to browse, a coordinated promotion using the spaces of store windows could be developed to attract visitors during different seasons or to publicize upcoming events in SoHo.

THE GUGGENHEIM MUSEUM SURVEY

The Guggenheim Museum conducted its survey from October 4 to October 12, 1992, prior to the July 1, 1992, opening of the Guggenheim Museum SoHo at 575 Broadway. The study was designed to learn about SoHo visitors and why they came to the neighborhood and to profile the potential museum audience and understand their potential visiting patterns.

The Guggenheim Museum would like to acknowledge Debra A. Neuger, Jeffrey K. Smith, and Lisa F. Wolf for their work in conducting this study for the museum.

SOHO TOURISM COUNCIL

Since spring, 1993, the following people have participated in the development of the SoHo Tourism Council:

Anastacia Aukeman
Dia Center for the Arts

Rebecca and Naci Balikci
Diva Restaurant

Patricia Blanchet
The Museum for African Art

Barrie Brennan
The Children's Museum of the Arts

Evelyn Brooks
Bettina Riedel, Ltd.

Barbara Bryan
SoHo Partnership

Henry Buhl
SoHo Partnership

Elaine Carl
Ceramica

Leo Castelli
Leo Castelli Gallery

Nicholas Christopher
Turon Travel, Inc.

Cecilia Clark
The Drawing Center

David Dean
Printed Matter

Michael Dean
Provence Restaurant

Jenny Dixon
Lower Manhattan Cultural Council

Cathy Emmons
Artists Space

Christine Fletcher
SoHo Partnership

Elaine Friedman
Lyme Regis, Ltd.

Linda Handler
Phoenix Gallery

Sally Hawkins
Sally Hawkins Gallery

Charlayne Haynes
The New Museum of Contemporary Art

Michael Ingbar
Michael Ingbar Gallery

Jeanette Ingberman
Exit Art

June Kelly
June Kelly Gallery

Valerie Kirk
Origins

Charlene Langos
Leo Castelli Gallery

Stephen Masullo
SoHo Wines & Spirits

Kathryn McAuliffe
The Museum for African Art

Karen McCready
Crown Point Press

A. Larry Meluso
Holiday Inn Downtown

Trey Monahan
Great Performances

Miriam Novalle
T Salon, Cafe & Emporium

Ann Palmieri
Barolo Ltd./I Tre Merli, Inc.

Diane Parker
National Westminster Bank

Penny Pilkington
P.P.O.W.

Kay Powell
SoHo Alliance

John Raysik
Félix Restaurant

Geno Rodriguez
The Alternative Museum

Patricia and Leon Sadoff
Spring Street Restaurant

Eva Saleh
Angelika Film Center

Steve Schubert
New York Open Center

Yves Seban
agnés b.

Suzette Sherman
Solomon R. Guggenheim Museum

P.M. Silvestri
Whole Earth Bakery & Kitchen

Amy Sims
New York Open Center

Jane Sullivan
Michael Ingbar Gallery

John Szoke
John Szoke Gallery

Susan Teller
Susan Teller Gallery

Paige Watson
Broadway Panhandler

Walter Wickiser
Walter Wickiser Gallery

Peri Wolfman
Wolfman•Gold & Good Company

Doris Wyman
New York Artists Equity Association

REFERENCES

The Arts as an Industry: Their Economic Importance to the New York-New Jersey Metropolitan Region. The Port Authority of NY & NJ, Alliance for the Arts, New York City Partnership, Partnership for New Jersey, October 1993.

Demographic Profiles: A Portrait of New York City's Community Districts From the 1980 & 1990 Censuses of Population and Housing. City of New York Department of City Planning, August 1992.

Domestic Leisure Travel to New York City. New York Convention & Visitors Bureau, Inc., June 1992.

New York State Department of Labor and the Port Authority of New York and New Jersey. 1992.

Solomon R. Guggenheim Museum Survey, October 1991.

Do you have any suggestions about how you would like to hear about future events or programs in SoHo?

10) What would have made your visit to SoHo more enjoyable?

Check all that apply. Please read or show all answers.

- | | |
|--|---|
| <input type="checkbox"/> Maps/brochure to area | <input type="checkbox"/> Organized tours |
| <input type="checkbox"/> A visitor information booth in SoHo | <input type="checkbox"/> Signs identifying points of interest in SoHo |
| <input type="checkbox"/> Public toilets | <input type="checkbox"/> Cleaner streets/less congestion |
| <input type="checkbox"/> Extended evening museum hours | <input type="checkbox"/> Other, please specify _____ |
| <input type="checkbox"/> Pedestrian walkway with no cars allowed | <input type="checkbox"/> Nothing |

11) How much money do you anticipate to spend on your visit to SoHo? (Include all expenses such as dining, retail, gifts, admissions fees, etc., only in the SoHo area) For total group.

- | | |
|-------------------------------------|---|
| <input type="checkbox"/> Under \$25 | <input type="checkbox"/> \$1000-2499 |
| <input type="checkbox"/> \$25-99 | <input type="checkbox"/> \$2500-4999 |
| <input type="checkbox"/> \$100-249 | <input type="checkbox"/> Over \$5000 |
| <input type="checkbox"/> \$250-499 | <input type="checkbox"/> Refuse to answer |
| <input type="checkbox"/> \$500-999 | <input type="checkbox"/> Don't know |

12) Was security/safety a concern when deciding to visit SoHo?

- Yes No

If yes, what were your main concerns?

- | | |
|---|--|
| <input type="checkbox"/> Harassments/Arguments | <input type="checkbox"/> Transportation accidents |
| <input type="checkbox"/> Assaults/Physical harm | <input type="checkbox"/> Pollution |
| <input type="checkbox"/> Theft | <input type="checkbox"/> Other, please specify _____ |

13) How does your experience in SoHo compare to that of other neighborhoods in New York City?
(Free Response)

14) Do you plan to return to SoHo?

- Yes No

BACKGROUND INFORMATION (For respondent only)

- | AGE | SEX | EDUCATION | ANNUAL HOUSEHOLD INCOME | ETHNIC ORIGIN |
|-----------------------------------|---------------------------------|---|---|---|
| <input type="checkbox"/> under 18 | <input type="checkbox"/> Male | <input type="checkbox"/> High School | <input type="checkbox"/> A...under \$20,000 | <input type="checkbox"/> Caucasian |
| <input type="checkbox"/> 18-24 | <input type="checkbox"/> Female | <input type="checkbox"/> Some college | <input type="checkbox"/> B...\$20,000-34,999 | <input type="checkbox"/> African American |
| <input type="checkbox"/> 25-34 | | <input type="checkbox"/> College graduate | <input type="checkbox"/> C...\$35,000-49,999 | <input type="checkbox"/> Latino/Hispanic American |
| <input type="checkbox"/> 35-44 | | <input type="checkbox"/> Post graduate | <input type="checkbox"/> D...\$50,000-74,999 | <input type="checkbox"/> Asian/Pacific American |
| <input type="checkbox"/> 45-54 | | | <input type="checkbox"/> E...\$75,000-100,000 | <input type="checkbox"/> Native American |
| <input type="checkbox"/> Over 55 | | | <input type="checkbox"/> F...over \$100,000 | <input type="checkbox"/> Other _____ |
| | | | <input type="checkbox"/> G...Refuse to answer | |

R _____

OUTSIDE OF NEW YORK CITY ONLY
MANHATTAN BOROUGH PRESIDENT'S OFFICE
SOHO VISITORS SURVEY

Today's date _____
_____ (12pm-5pm)
_____ (6pm-9pm)
Location _____

- 1) Where do you live?
 Tri-state area
 Out of tri-state
 International
- 2) What is your zip code or nation of residence? _____
- 3) Do you know that you are in SoHo?
 Yes No

If no, SoHo is the area south of Houston, west of Lafayette, north of Canal, and east of the Avenue of the Americas.

- 4) What was your primary reason for visiting SoHo today? Check only one. Please read or show all answers.
- | | |
|---|--|
| <input type="checkbox"/> Museums | <input type="checkbox"/> Work in area |
| <input type="checkbox"/> Galleries | <input type="checkbox"/> Organized tour |
| <input type="checkbox"/> Dining/Restaurants | <input type="checkbox"/> Passing by/browsing/window shopping |
| <input type="checkbox"/> Shopping/Retail establishments | <input type="checkbox"/> Other, please specify _____ |
| <input type="checkbox"/> Other cultural institutions | |

- 5) Is this your first visit to the SoHo area?
 Yes No

If not, in the past year, how many times have you visited SoHo?
 1-3 4-10 11-25 Weekly Daily

- 6) How many people are in your group? _____
How many in your group are under the age of 12? _____

- 7) What is the length of your stay in New York City?
- | | |
|-------------------------------------|--|
| <input type="checkbox"/> Day trip | <input type="checkbox"/> 1 week-1 month |
| <input type="checkbox"/> 1-3 nights | <input type="checkbox"/> More than 1 month |
| <input type="checkbox"/> 4-7 nights | |

- 8) Are you staying with friends/relatives or in hotels?
 Friends/Relatives Hotels/Motels

- 9) How important was visiting SoHo in your decision to visit New York City?
 Very important Important Somewhat important Not important No opinion

- 10) How many hours do you plan to spend in SoHo today?
 Less than 1 hour 1-3 hours 3-5 hours More than 5 hours

- 11) What activities have you done or are planning to do in SoHo today?
Check as many as apply. Please read or show all answers.
- | | |
|--|--|
| <input type="checkbox"/> Visit museums | <input type="checkbox"/> Work in area |
| <input type="checkbox"/> Visit galleries | <input type="checkbox"/> Wander/browse/window shop |
| <input type="checkbox"/> Dine in restaurants | <input type="checkbox"/> Other, please specify _____ |
| <input type="checkbox"/> Shop in retail establishments | |
| <input type="checkbox"/> Visit other cultural institutions, please specify _____ | |

12) How did you hear about SoHo events and activities?

Check as many as apply. Please read or show all answers.

- | | |
|--|---|
| <input type="checkbox"/> Travel guides/books | <input type="checkbox"/> Information booth in SoHo |
| <input type="checkbox"/> Organized tours | <input type="checkbox"/> "I Love New York" publications |
| <input type="checkbox"/> Hotel Concierges | <input type="checkbox"/> Street signs in SoHo |
| <input type="checkbox"/> Radio | <input type="checkbox"/> Word of mouth/friends |
| <input type="checkbox"/> Television | <input type="checkbox"/> Other, please specify _____ |
| <input type="checkbox"/> Posters in rail cars, buses, subways, and other transportation | |
| <input type="checkbox"/> Brochures distributed at tourist information centers and other travel centers | |
| <input type="checkbox"/> Newspaper/Magazine, please specify publication _____ | |

Do you have any suggestions about how you would like to hear about future events in SoHo?

13) What would have made your visit to SoHo more enjoyable? Check all that apply.

- | | |
|--|---|
| <input type="checkbox"/> Maps/brochure to area | <input type="checkbox"/> Organized tours |
| <input type="checkbox"/> A visitor information booth in SoHo | <input type="checkbox"/> Signs identifying points of interest in SoHo |
| <input type="checkbox"/> Public toilets | <input type="checkbox"/> Cleaner streets/less congestion |
| <input type="checkbox"/> Extended evening museum hours | <input type="checkbox"/> Other, please specify _____ |
| <input type="checkbox"/> Pedestrian walkway with no cars allowed | <input type="checkbox"/> Nothing |

14) How much money do you anticipate to spend on your visit to SoHo? (Include all expenses such as dining, shopping, admissions fees, only in the SoHo area) For total group.

- | | |
|-------------------------------------|---|
| <input type="checkbox"/> Under \$25 | <input type="checkbox"/> \$1000-2499 |
| <input type="checkbox"/> \$25-99 | <input type="checkbox"/> \$2500-4999 |
| <input type="checkbox"/> \$100-249 | <input type="checkbox"/> \$Over \$5000 |
| <input type="checkbox"/> \$250-499 | <input type="checkbox"/> Refuse to answer |
| <input type="checkbox"/> \$500-999 | <input type="checkbox"/> Don't know |

15) How much do you anticipate to spend on your visit to New York City? (Include all expenses such as dining, shopping, admissions fees, transportation, hotels, motels, etc.) For total group.

- | | |
|--------------------------------------|---|
| <input type="checkbox"/> Under \$100 | <input type="checkbox"/> \$5000-9999 |
| <input type="checkbox"/> \$100-499 | <input type="checkbox"/> Over \$10,000 |
| <input type="checkbox"/> \$500-999 | <input type="checkbox"/> Refuse to answer |
| <input type="checkbox"/> \$1000-2499 | <input type="checkbox"/> Don't know |
| <input type="checkbox"/> \$2500-4999 | |

16) Was security/safety a concern when deciding to visit SoHo?

- Yes No

If yes, what were your main concerns?

- | | |
|---|--|
| <input type="checkbox"/> Harassment/Arguments | <input type="checkbox"/> Transportation accidents |
| <input type="checkbox"/> Assaults/Physical Harm | <input type="checkbox"/> Pollution |
| <input type="checkbox"/> Theft | <input type="checkbox"/> Other, please specify _____ |

17) How does your experience in SoHo compare to that of other neighborhoods in Manhattan? (Free response)

18) Do you plan to return to SoHo?

- Yes No

BACKGROUND INFORMATION (For respondent only)

AGE

- under 18
- 18-24
- 25-34
- 35-44
- 45-54
- Over 55

SEX

- Male
- Female

EDUCATION

- High School
- Some college
- College graduate
- Post graduate

ANNUAL HOUSEHOLD INCOME

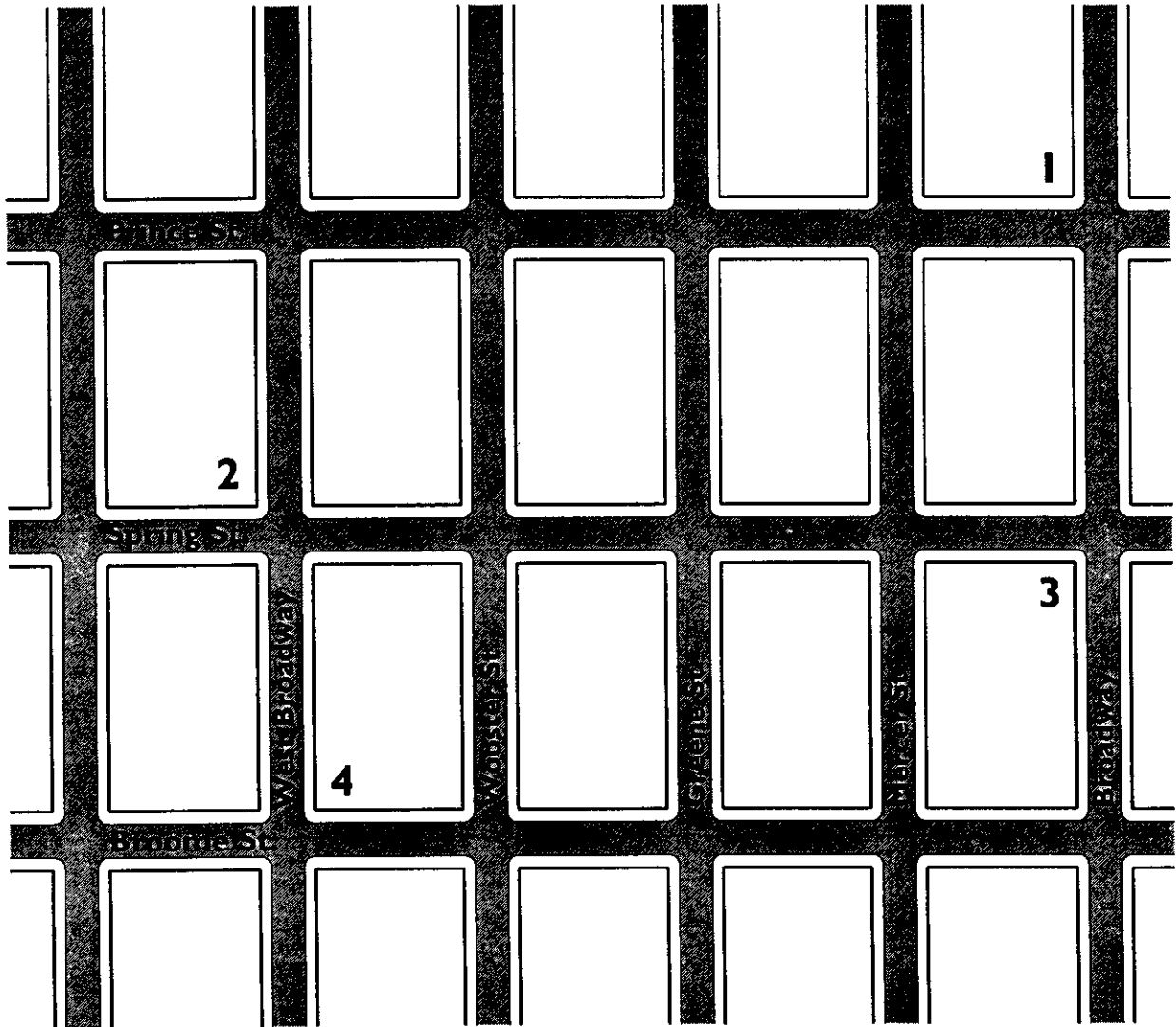
- A...under \$20,000
- B...\$20,000-34,999
- C...\$35,000-49,999
- D...\$50,000-74,999
- E...\$75,000-100,000
- F...over \$100,000
- G...Refuse to answer

ETHNIC ORIGIN

- (Only for U.S. residents)
- Caucasian
 - African American
 - Latino/Hispanic American
 - Asian/Pacific Islander American
 - Other _____

R _____

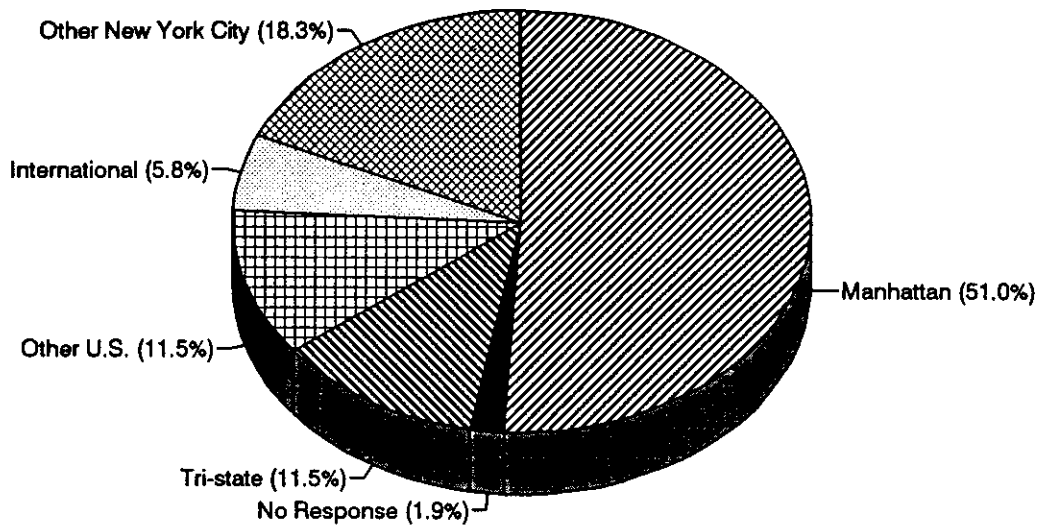
Figure 2



Survey Locations Indicated By Number

Figure 3a

Where do you reside?



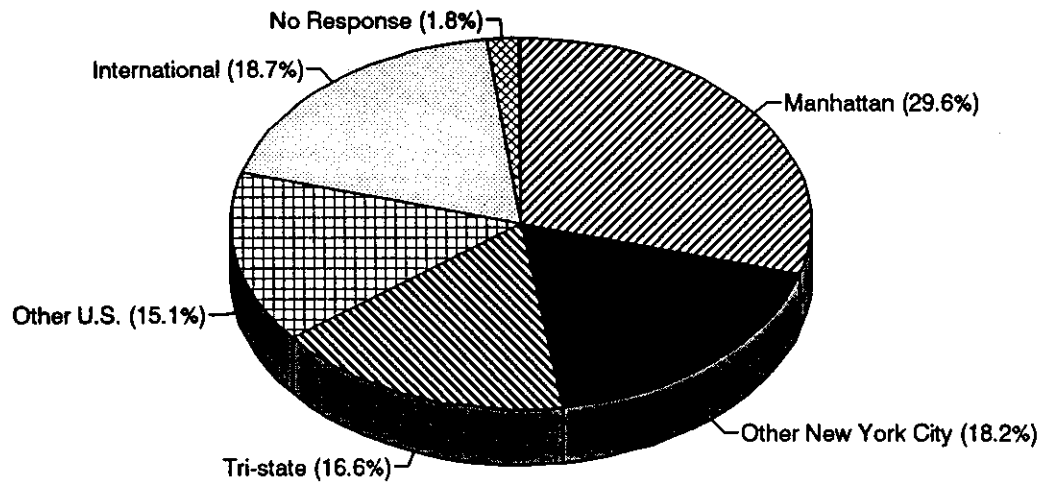
Guggenheim Survey

October, 1991

Source: Guggenheim Museum's SoHo Survey, 1991.

Figure 3b

Where do you reside?



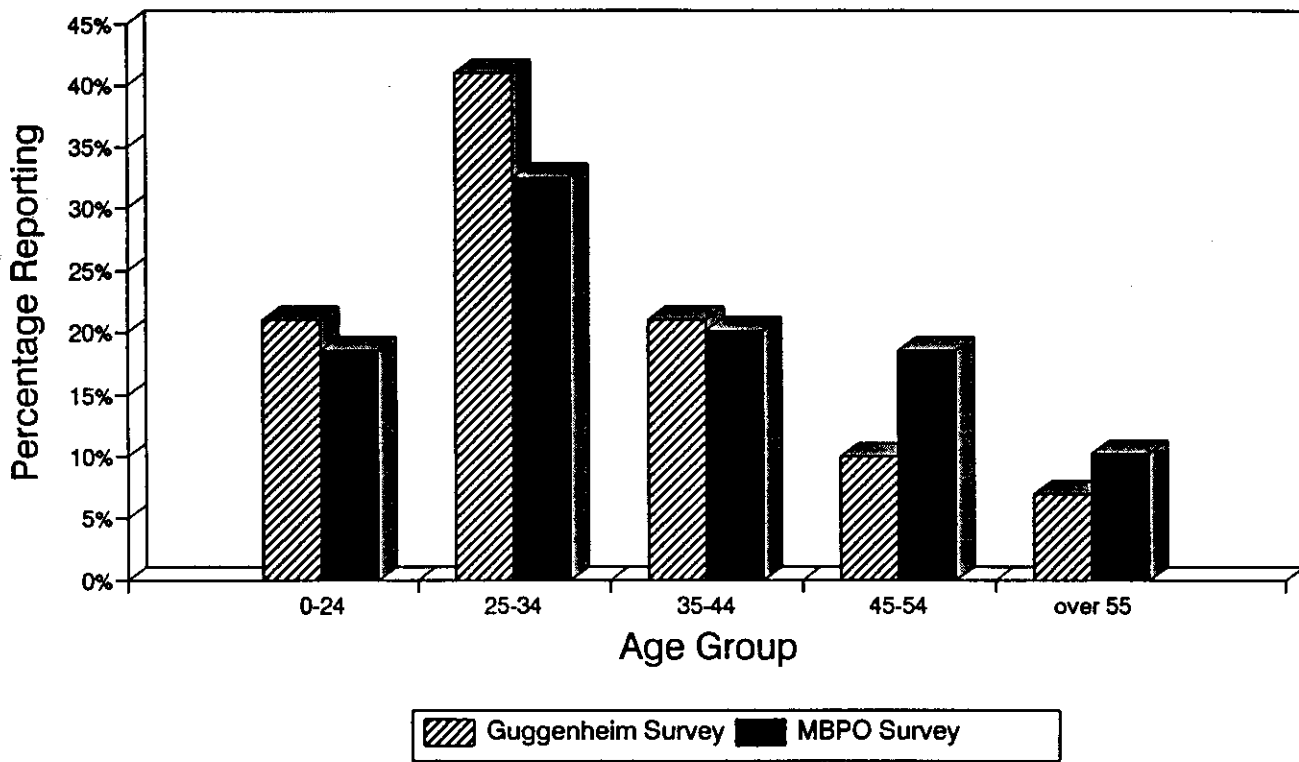
MBPO Survey

July, 1993

Source: Manhattan Borough President's SoHo Survey, 1993.

Figure 4

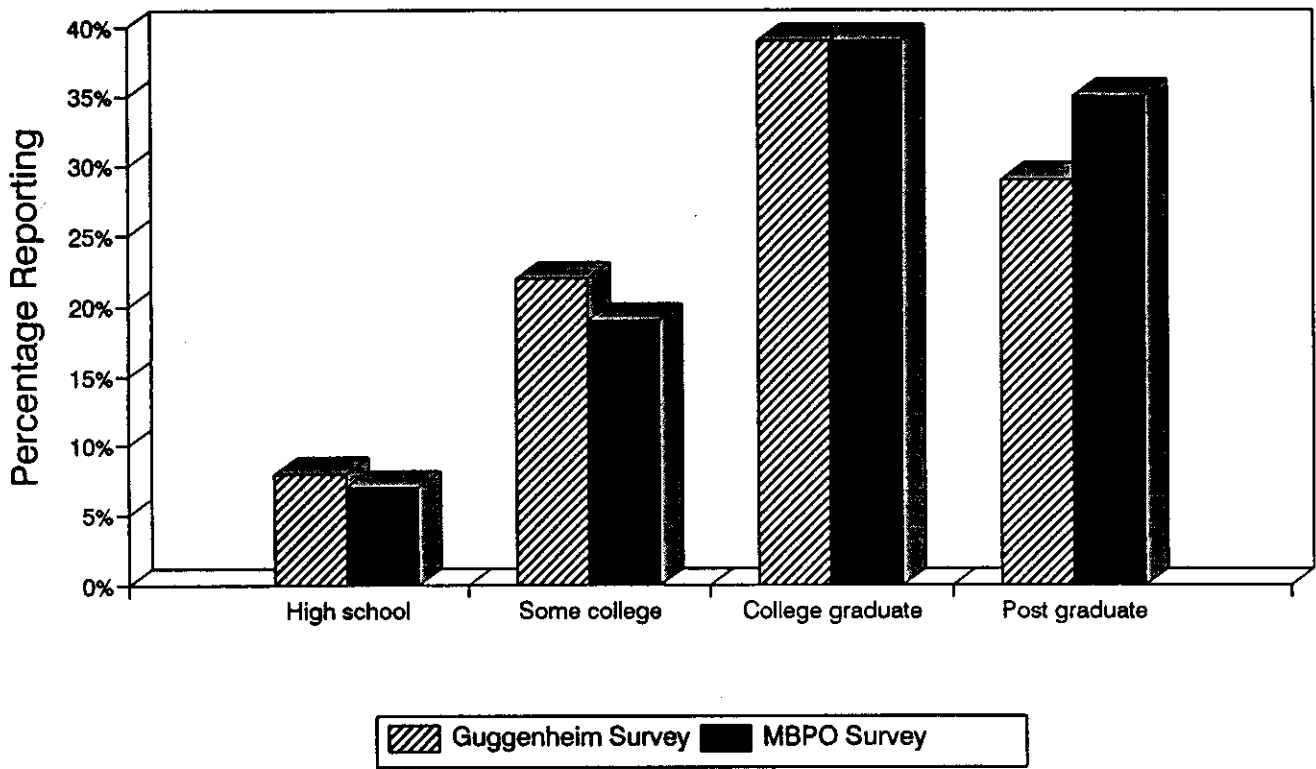
What age group do you fall within?



Sources: Guggenheim Museum's SoHo Survey, October, 1991.
Manhattan Borough President's SoHo Survey, July, 1993.

Figure 5

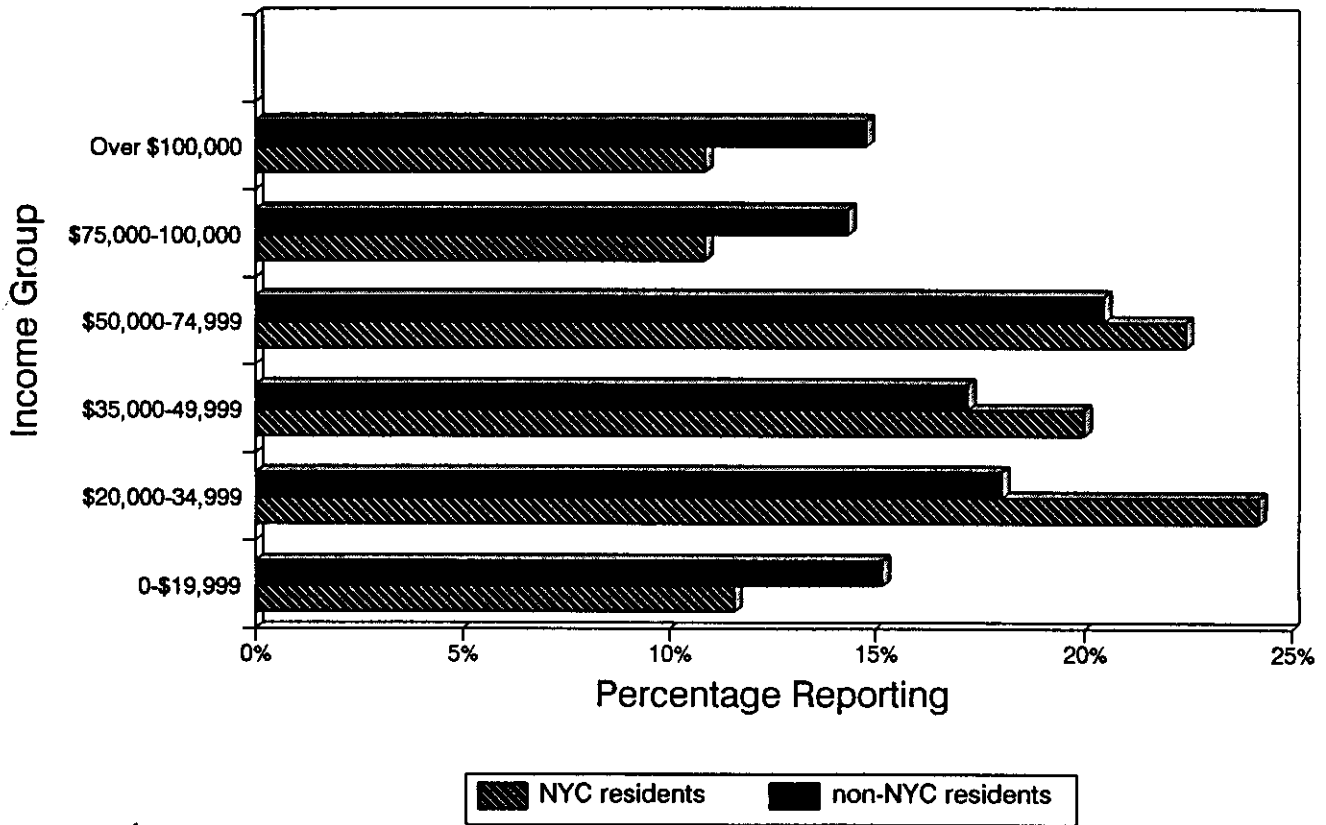
What is your education level?



Sources: Guggenheim Museum's SoHo Survey, October, 1991.
Manhattan Borough President's SoHo Survey, July, 1993.

Figure 6

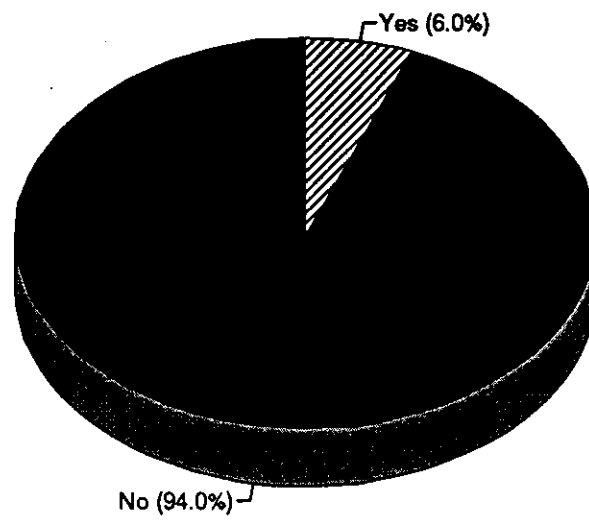
What income range do you fall within?



Source: Manhattan Borough President's SoHo Survey, 1993.

Figure 7a

First Visit to SoHo



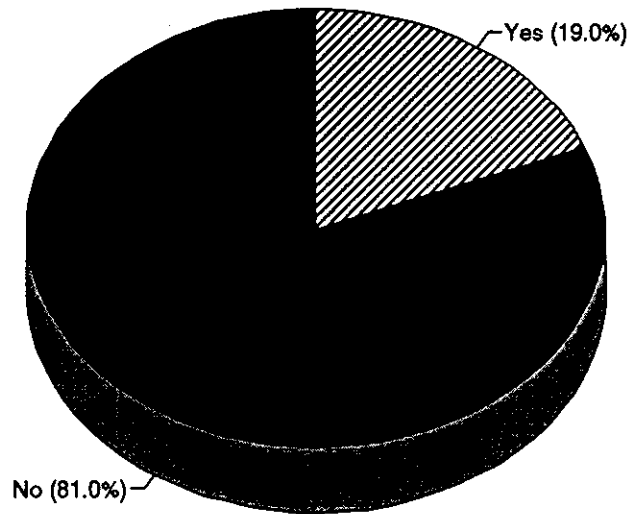
Guggenheim Survey

October, 1991

Source: Guggenheim Museum's SoHo Survey, 1991.

Figure 7b

First Visit to SoHo

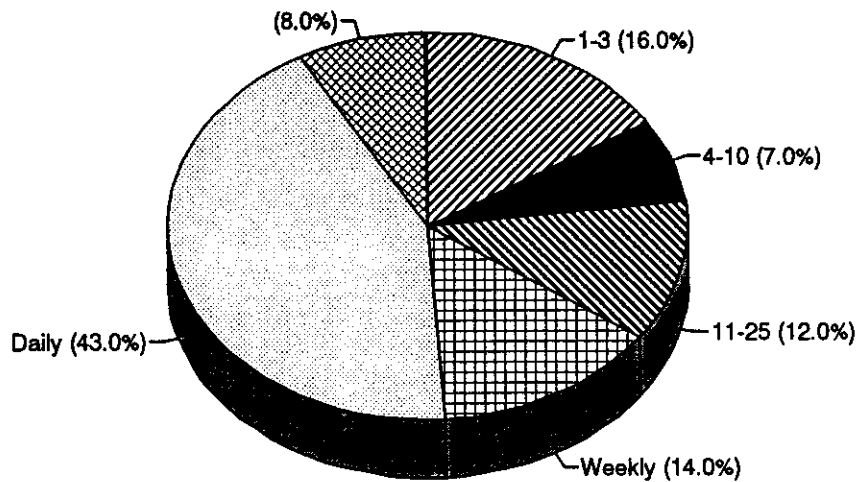


MBPO Survey
July, 1993

Source: Manhattan Borough President's SoHo Survey, 1993.

Figure 7c

Frequency of Visits to SoHo in the Last 12 Months

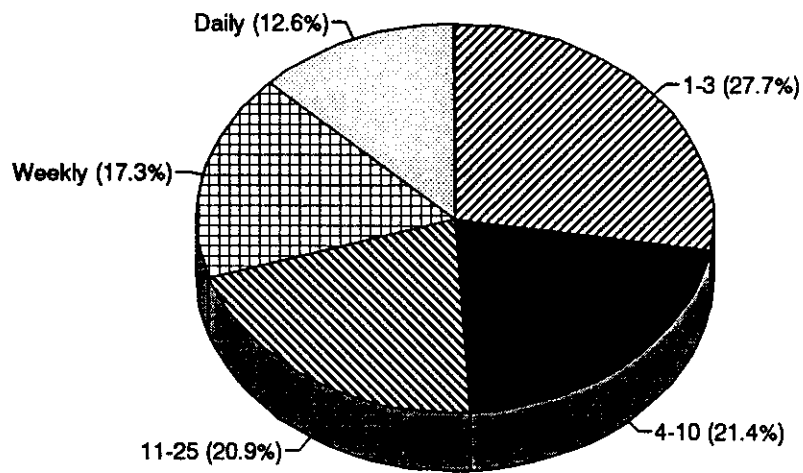


Guggenheim Survey
October, 1991

Source: Guggenheim Museum's SoHo Survey, 1991.

Figure 7d

Frequency of Visits to SoHo in the Last 12 Months

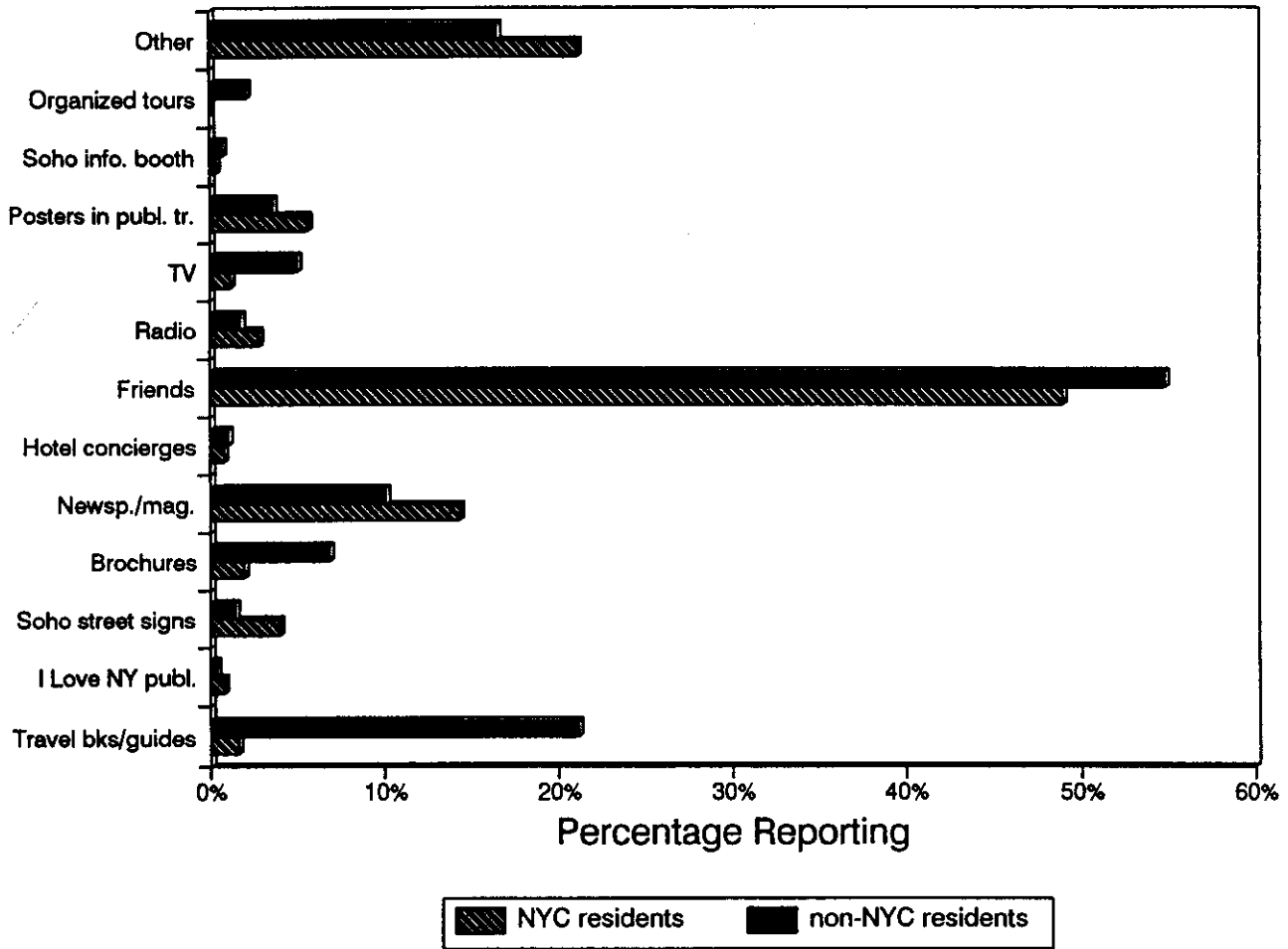


MBPO Survey
July, 1993

Source: Manhattan Borough President's SoHo Survey, 1993.

Figure 8

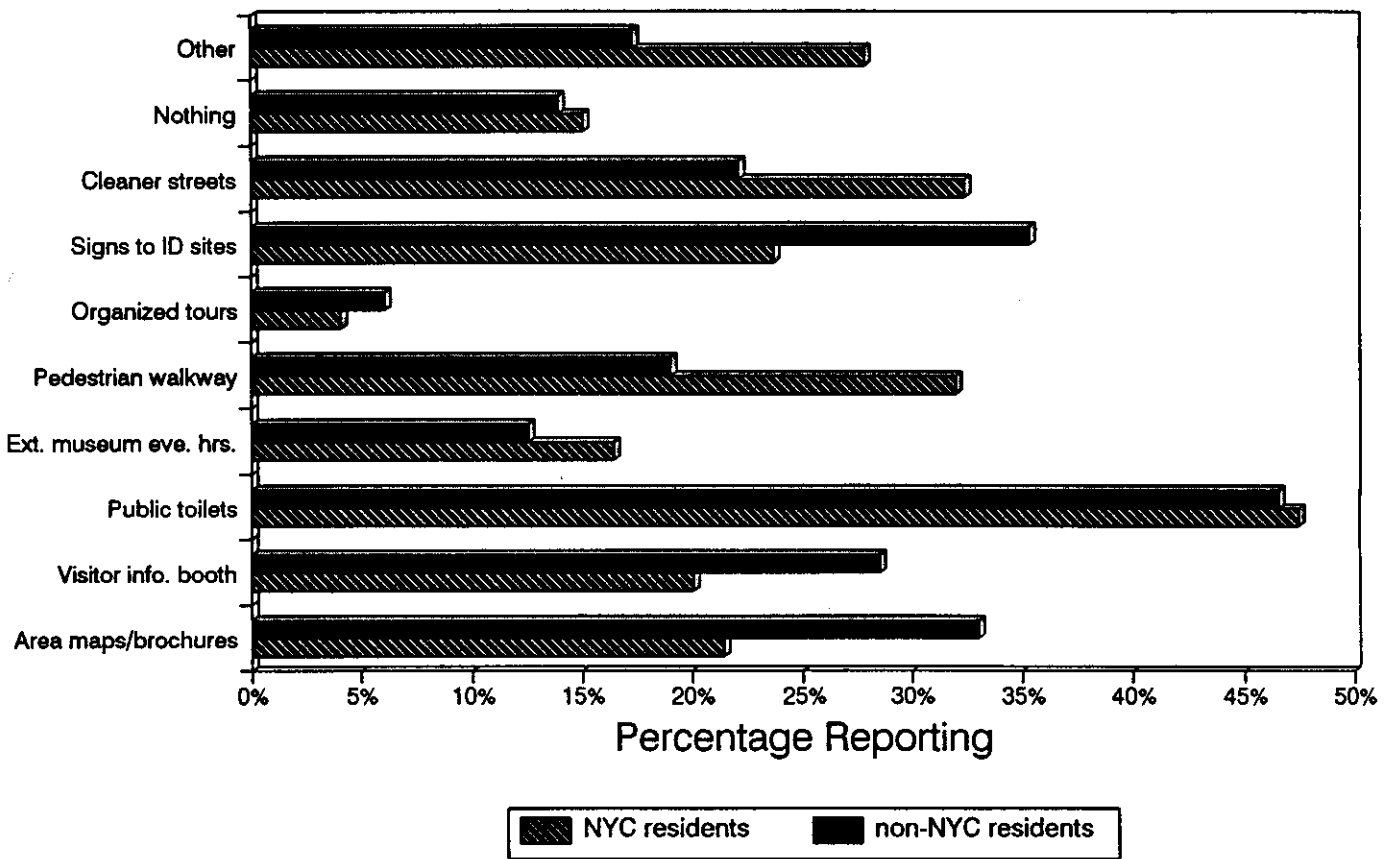
How do you hear about SoHo activities?



Source: Manhattan Borough President's SoHo Survey, 1993.

Figure 9

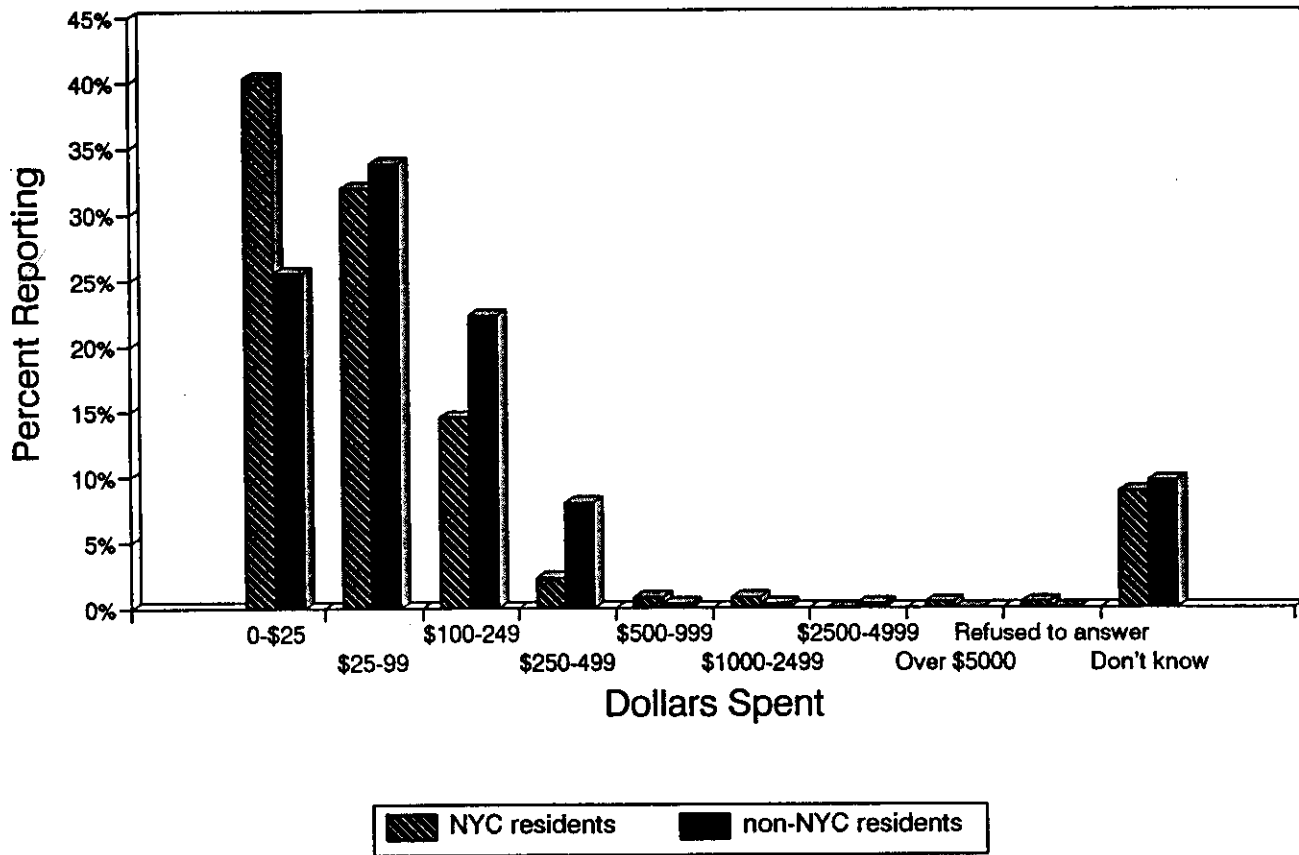
What would have made your visit to SoHo more enjoyable?



Source: Manhattan Borough President's SoHo Survey, 1993.

Figure 10

How much did you spend in SoHo?



Source: Manhattan Borough President's SoHo Survey, 1993.