



ECONOMIC IMPACT OF THE HUSKY ATHLETIC PROGRAM ON THE WASHINGTON ECONOMY

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EXECUTIVE SUMMARY

The Husky athletic program supports 2,558 jobs in the Washington economy, generates \$211 million in annual sales by Washington businesses, and creates \$83 million annually in labor income in Washington State. Husky athletics also lead to about \$12.5 million annually in tax revenue, about \$8.2 million of which accrues to the State of Washington, and about \$4.3 million accrues to local governments primarily in King County. These impacts are based on estimates of spending by the athletic program and by fans coming the Husky athletic events.

The Husky athletic program had revenue of \$60 million in 2007, and incurred \$23.4 million in labor-related costs. The Husky athletic program had 200 full time positions, and 300 part time positions. The Husky athletic program spent another \$33.6 million for goods and services, an estimated \$23 million of which were made in Washington State. Major in-state expenses were for services provided by the UW, for facility maintenance, for various professional and health services, and for transportation. Out-of-state costs were largely for guarantees paid to visiting teams, transportation, accommodations, supplies and equipment, and other services.

Fans spent an estimated \$52 million attending Husky games, of which \$24.4 was program revenue to the athletic department through tickets. Fans come largely from the local area, some 77% of fans coming from King, Pierce, Snohomish, and Kitsap counties. Another 13% of the fans come from elsewhere in Washington state, and 10% of the fans also come from out-of-state. A substantial cohort of out-of-state fans come to Husky Football games. Local fans incur costs primarily for tickets, auto travel, and food/beverages before, at, or after games. In contrast, fans from out-of-state have high travel and lodging costs, leading to much higher average spending per attendee. In this analysis, it was estimated that local residents spent an average of \$25.18 in non-ticket costs, fans from elsewhere in Washington State were estimated to spend an average of \$39.68 on non-ticket costs, while those from out-of-state were estimated to spend an average of \$137.79 per day on non-ticket costs. It was assumed that fans coming to football games to root for opposing teams (mostly from out of state but also Cougar fans from in-state) had two days of expenditures in relation to their trip.

Economic impacts are largely felt in service industries. These impacts are due the direct spending by UW athletics and by fans, and the nature of the indirect and induced effects, that are again largely concentrated in service industries. The largest impacts are in retail trade; professional services; educational services; health services; arts, entertainment, and recreation services; food services; and state and local governments. Impact multipliers are relatively high due to the high wages earned by full time staff at Husky athletics, and the mix of visitor spending that is skewed to high per-capita spending by those traveling from long distances.

I. INTRODUCTION

This report provides estimates of the economic impact of Husky athletic programs on the Washington economy. These estimates are based on expenditures made by the athletic program in Washington State, and on estimates of spending by fans attending UW athletic events, as well as spending by visiting teams and media.

While excellent data were available for spending by the UW athletic program, good quality survey data were not available for spending by fans, visiting teams, and media. In lieu of fan survey data specific to UW athletic events, spending estimates from surveys from several other studies were developed for the purposes of this analysis.

This report is organized as follows. Section II reports estimates of the various components of the impact analysis. This includes fan spending, athletic program spending, and spending by visiting teams and press. This section also describes the economic impact model used to estimate indirect and induced impacts of Husky athletic programs. Section III reports results of the impact analysis, while section IV presents conclusions regarding this analysis.

II. COMPONENTS OF THE IMPACT ANALYSIS

Economic impact analyses require data on activities relevant to the subject being analyzed. In the case of this analysis, an attempt was made to estimate the economic impact of UW athletic programs. Ideally, such an analysis would be based on primary data for the components of the program and spending by people attending athletic events. UW sports activities include a wide range of events, from football, basketball, baseball, track, to crew and many other types of sports programs. Many activities have no paid admission and there are no data gathered on the number of spectators (such as crew races). Other activities involve paid admissions, such as at basketball and football. In the present analysis we were only able to include paid attendance estimates for football, basketball, baseball, softball, gymnastics, soccer, and volleyball. It is realized that this underestimates the overall economic impact of spending by those attending UW athletic events. Other components in this economic impact analysis include estimates of fan spending, and spending by visiting teams, referees, and press. An impact model is also required, and in the case of the present analysis, we have used the 1997 Washington State input-output model to estimate economic impacts. The next sections of this report document the various components entering into the economic impact analysis.

(1) FAN SPENDING

Primary data on fan spending were not available for the purposes of this report. Therefore, the author turned to spending estimates developed in other economic impact analyses. Fan spending varies considerably by region of origin. Local fans typically have no lodging or air travel costs, while fans from out of state frequently report these costs. Data from six studies were analyzed where region-of-origin data were available. Since ticket/admission costs do not enter into the economic impact modeling, the non-ticket expenditures were considered in analyses of these six studies. The reason that ticket costs do not enter the impact analysis is they are part of the revenue stream to Husky sports, and the expenses for Husky sports are included as direct expenditures. To count spending on tickets would be double-counting a portion of the impacts, so they are excluded.

The six studies were an economic impact of the Seahawks undertaken in 1993 (Beyers & Conway 1994), an economic impact study done for O'Loughlin Trade Shows for the Sportsmen's show in 2003 (Beyers 2003), the 2002 economic impact study of arts and cultural organization patrons undertaken for ArtsFund (Beyers and GMA Research 2003), a 2005 economic impact study undertaken in 2005 for the Seattle Arts Museum for their Van Gogh to Mondrian exhibition (Beyers 2005), a economic impact study undertaken in 2005 for the Seattle Center (Beyers and GMA Research 2005a), and an economic impact study undertaken in 2005 of the Key Arena (Beyers and GMA Research 2005b). Percentages of spending on non-ticket items were calculated for these studies, and the absolute dollars spent by people from three regions of origin

(local, other in state, and out-of-state) were also estimated in constant \$2007. The average percentages and dollars spent were estimated from these analyses, and are reported in Table 1.

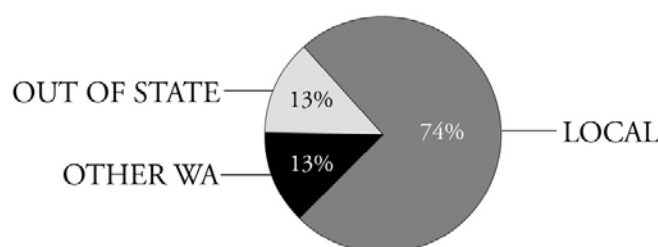
TABLE 1 : AVERAGE PERCENTAGE SPENT BY VISITOR/FANS BY REGION OF ORIGIN (EXCLUDES TICKETS/ADMISSIONS)

	LOCAL	OTHER WA	OUT OF STATE
PARKING FEES	10.42%	5.17%	1.69%
BUS / FERRY / TAXI COSTS	1.33%	3.93%	0.94%
AUTO TRAVEL COSTS	10.29%	10.18%	8.22%
FOOD / BEVERAGES BEFORE OR AFTER EVENT	38.74%	26.49%	13.50%
FOOD / BEVERAGES AT EVENT	11.40%	7.86%	3.57%
SOUVENIRS & GIFTS	12.68%	14.35%	8.31%
ENTERTAINMENT	3.85%	5.01%	4.98%
LODGING / ACCOMMODATION COSTS	1.38%	16.38%	22.76%
AIR TRAVEL COSTS	3.70%	5.63%	32.18%
CHILD CARE	1.79%	1.08%	0.34%
OTHER	4.41%	3.95%	3.50%
TOTAL	100.00%	100.03%	100.00%
AVERAGE SPENDING PER CAPITA	\$25.18	\$39.68	\$137.79

Table 1 clearly shows an increase in expenditures as trip-length increases. It also shows systematic variation in the composition of expenditures. Local visitor expenditures are dominated by local travel costs and food/beverages. Travelers from somewhat longer distances have an increase in lodging costs, somewhat lower meal costs, and lower shares of parking fees and auto-travel related costs. Travelers from out-of-state incur hotel/motel and air travel costs more frequently than local visitors, and this shifts upward their overall expenditures, and it changes the share dramatically on which expenditures are made. We do not know how well the non-ticket/admission expenditure distributions in Table 1 represent UW athletics, but they are likely to be “in the ball park.”

A second issue for this analysis is where UW athletic fans come from, so as to apply the percentage distributions in Table 1 to the appropriate number of annual admissions. UW athletics did a special tabulation for the author of where ticket holders came from to football games, as measured by zip codes. Figure 1 reports the findings of this analysis, which was based on analyses of season ticket holders, single ticket purchases, and those purchasing tickets to come as fans rooting for the opposing team. The local group of fans was defined to be from King, Pierce, Snohomish, and Kitsap county zip codes.

FIGURE 1 : ORIGIN OF HUSKY FOOTBALL PATRONS



A third issue is how many total attendees or patrons came to UW athletic events in 2007. Data on football admissions were tabulated for the author as described above, while admissions data for other Husky sports were not provided in the same way. The Athletic Department provided an estimate of 199,682 persons coming to non-football events who paid admission. It was assumed that the geographic origin of these people was the same as those attending Husky football games (except for those estimated to be attending to support the opposing teams; this was estimated to be 10,000 persons from Washington state outside the local area, and 32,366 people from out-out-state). The non-football fan analysis results in a more localized distribution than reported in Figure 1, with 82.4% estimated to be from the local area, 12.2% from elsewhere in Washington State, and 5.3% from out of state.

Applying the various factors described above, total spending by attendees was estimated, and it is reported in Table 2. In calculating these fan spending estimates, it was assumed that local and other Washington fans had one day of expenses, while those coming from out-of-state to support opposing teams were estimated to have two days of expenses.

Table 1 and Table 2 divide food and beverage costs into spending before or after the event, and at the event. The studies upon which these data were based are likely to include more opportunities for spending on food and beverages at “at the event” than is the case in Husky stadium and at Husky sports events. These categories of spending are combined in the economic impact analysis, but were left separate in these tables. The athletic department provided an estimate of \$1.23 million for revenue from concessions, souvenirs, and parking, well below the combined estimates reported in Table 2. However, fans incur parking costs outside the UW in relation to their Husky sports trips, they buy souvenirs elsewhere, and they also have food and beverage costs outside Husky stadium. How much the expenditures would be in relation to “tailgating” is completely unknown, and would be determined through a survey of Husky sports fans.

TABLE 2 : NON-TICKET HUSKY SPORTS FAN SPENDING (\$ MILLIONS)

	LOCAL	OTHER WA	OUT OF STATE	TOTAL
PARKING FEES	\$1.180	\$0.173	\$0.218	\$1.571
BUS / FERRY / TAXI COSTS	0.151	0.132	0.122	0.404
AUTO TRAVEL COSTS	1.165	0.341	1.062	2.568
FOOD / BEVERAGES BEFORE OR AFTER EVENT	4.384	0.888	1.745	7.018
FOOD / BEVERAGES AT EVENT	1.290	0.264	0.461	2.015
SOUVENIRS & GIFTS	1.435	0.481	1.074	2.991
ENTERTAINMENT	0.435	0.168	0.644	1.247
LODGING / ACCOMMODATION COSTS	0.156	0.549	2.943	3.648
AIR TRAVEL COSTS	0.418	0.189	4.159	4.767
CHILD CARE	0.202	0.036	0.043	0.282
OTHER	0.499	0.133	0.453	1.085
TOTAL	\$10.882	\$3.417	\$12.926	\$27.596

(2) ATHLETIC PROGRAM SPENDING AND REVENUE

The athletic program provided the author is an enumeration of revenue and expenses associated with the program for projected fiscal year 2007-2008. These data show revenues by category, and expenditures by category. Table 3 summarizes expected revenues. The total operating revenue was used as the total sales value entering the input-output model. Total 4 provides estimates of total operating expenses, here broken into labor related expenses (for 200 full time employees and up to 300 part time employees), and other operating expenses. Detail on the other operating expenses was provided, and is reported below in Table 6, categorized by the input-output categories and reported for expenses incurred in Washington State.

TABLE 3 : HUSKY SPORTS REVENUES (\$ THOUSANDS)

OPERATING REVENUES	PROJECTION FOR 2007-2008
GATE REVENUE	\$24,430
CONTRIBUTIONS	11,344
NCAA / CONFERENCE DISTRIBUTIONS	8,880
MULTIMEDIA RIGHTS	5,310
TUITION WAIVERS	1,850
OTHER SPONSORSHIPS, DONATED ADV. & SUP'S	3,504
CONCESSIONS, SOUVENIRS, PARKING	1,230
INVESTMENT INCOME	2,200
OTHER REVENUE	842
TOTAL	\$59,590

Source: UW Athletic Department

TABLE 4 : HUSKY SPORTS OPERATING EXPENSES (\$ MILLIONS)

LABOR	\$23.41
OTHER OPERATING EXPENSES	33.69
TOTAL OPERATING EXPENSES	\$57.10

Source: UW Athletic Department

(3) VISITING TEAMS, REFEREES, AND PRESS

Expenditures incurred by visiting teams, referees, and press also create local economic impact. We had only partial data on these expenses. The Athletic Department indicated that it spent \$3.5 million on team travel, of which \$1.5 million was airfare. They reason that visiting teams incur similar expenses to play in Seattle. These expenses must be similar to those of out-of-state visitors, largely local travel, lodging, and food. Table 5 presents estimated expenditures for visiting teams (assume referee costs are included here). The UW Athletic Department provided an estimate of the number of press officials traveling to Seattle in relation to home games. It was estimated that expenses for some of these games (5) would be incurred for two nights, and for two games one night. Using the out-of-state fan distribution in Table 1, an estimate of their local expenses was made. This is included in Table 5; approximately 980 person-nights were estimated to be related to press.

TABLE 5 : ESTIMATED SPENDING BY VISITING TEAMS, REFEREES & PRESS (\$ MILLIONS)

	VISITING TEAMS	PRESS
PARKING FEES	\$0.05	\$0.00
BUS / FERRY / TAXI COSTS	0.03	0.00
AUTO TRAVEL COSTS	0.27	0.01
FOOD / BEVERAGES BEFORE OR AFTER GAME	0.44	0.02
FOOD / BEVERAGES AT EVENT	0.12	0.00
SOUVENIRS & GIFTS	0.27	0.01
ENTERTAINMENT	0.16	0.01
LODGING / ACCOMMODATION COSTS	0.74	0.03
AIR TRAVEL COSTS	1.04	0.04
CHILD CARE	0.01	0.00
OTHER	0.11	0.00
TOTAL	\$3.24	\$0.12

Data for each of the components of the impact analysis were reformatted from the consumer expenditure categories reported in Tables 1, 2, and 5 into the classification used in the input-output models. The input-output model operates with what are called “producer prices;” and this means that in categories of spending such as souvenirs and gifts, the value of the margins earned in selling these souvenirs is estimated to be the sale from the retail trade sector, while the industry producing these souvenirs or gifts are presumed to be selling directly to the purchaser. In most cases that data in Tables 1, 2, and 5 can be directly translated into the input-output categories. A similar re-classification of Husky Sports spending was also undertaken. Table 6 contains estimates of the direct economic impacts that are crucial to the impact estimates developed in the input-output model.

TABLE 6 : DIRECT ECONOMIC IMPACTS

	ATHLETICS	ATHLETICS (\$MILLIONS)	FANS/MEDIA/ VISITING TEAMS	TOTAL TO TABLE 2 IN IMPACT MODEL
1 CROP PRODUCTION	\$0	\$0	\$0	\$0
2 ANIMAL PRODUCTION	0	0	0	0
3 FORESTRY AND FISHING	0	0	0	0
4 LOGGING	0	0	0	0
5 MINING	0	0	0	0
6 ELECTRIC UTILITIES	540	0.54	0	0.54

TABLE 6 : DIRECT ECONOMIC IMPACTS — CONTINUED

7 GAS UTILITIES	0	0	0	0
8 OTHER UTILITIES	635	0.635	0	0.635
9 CONSTRUCTION	975	0.975	0	0.975
10 FOOD MANUFACTURING	0	0	0	0
11 TEXTILES AND APPAREL	0	0	0	0
12 WOOD PRODUCT MANUFACTURING	0	0	0	0
13 PAPER MANUFACTURING	0	0	0	0
14 PRINTING	368	0.3675	0	0.3675
15 PETROLEUM AND PRODUCTS	0	0	1.423	1.423
16 CHEMICAL MANUFACTURING	0	0	0	0
17 NONMETALLIC MINERAL PRODUCTS	0	0	0	0
18 PRIMARY METALS	0	0	0	0
19 FABRICATED METALS	0	0	0	0
20 MACHINERY MANUFACTURING	0	0	0	0
21 COMPUTER AND ELECTRONIC PRODUCT	72	0.072	0	0.072
22 ELECTRICAL EQUIPMENT	0	0	0	0
23 AIRCRAFT AND PARTS	0	0	0	0
24 SHIP AND BOAT BUILDING	0	0	0	0
25 OTHER TRANSPORTATION EQUIPMENT	0	0	0	0
26 FURNITURE	160	0.16	0	0.16
27 OTHER MANUFACTURING	0	0	0	0
28 WHOLESALE TRADE	0	0	0	0
29 RETAIL TRADE	1,536	1.536	2.501	4.037
30 TRANSPORTATION AND WAREHOUSING	1,968.84	1.969	3.363	5.332
31 INFORMATION	76	0.076	0	0.076
32 FINANCE AND INSURANCE	366	0.366	0.142	0.508
33 REAL ESTATE	0	0	0	0
34 PROFESSIONAL SERVICES AND	621	0.621	0	0.621
35 EDUCATIONAL SERVICES	11,144	11.144	0	11.144
36 HEALTH SERVICES	540	0.54	0	0.54
37 ARTS, RECREATION, AND ACCOMMODATION	1,455	1.455	5.833	7.288
38 FOOD SERVICES AND DRINKING PLACES	1,363	1.363	9.610	10.973
39 OTHER SERVICES	120	0.12	1.913	2.033
LABOR INCOME	23,414	23.414	0.293	23.707
OTHER VALUE ADDED	1,100	1.1	0	1.1
TOTAL		\$46.45	\$25.078	\$71.531

(4) THE I/O MODEL

A version of the 1997 Washington input-output model was used to calculate impacts of Husky athletics and their patrons. It was sponsored by the Washington State Office of Financial Management, and is available online at <http://www.ofm.wa.gov/economy/io/default.asp>. The specific version of this model used for this impact analysis is the same as the author used in 2006 for economic impact estimates of Seattle Center and the Key Arena. The model has the same sectoring plan as used in Table 5. The setup of the model places the revenues, employment, and labor income paid by the Athletic Department into the model, as well as the last column of data in Table 6. The model calculated indirect and induced impacts for output, employment, and labor income in each industry. It is also programmed to provide estimates of selected tax revenue impacts.

III. IMPACT RESULTS

The results of the setup of the model are reported in Tables 7 and 8. Table 7 contains detailed results, while Table 8 provides summary estimates. This model indicates that Husky athletics support 2,558 jobs in the Washington economy, of which 500 are direct jobs (both full time and part time) in the athletic program (which is classified in the arts, recreation, and accommodation sector). The value of sales made in the Washington economy is estimated to be \$210.6 million, while labor income created is estimated to be \$83.4 million. Most of the economic impacts are the result of indirect effects, related to the spending of labor

income that is in turn focused strongly on various services. Thus, almost 95% of the impacts are felt in the service sector.

TABLE 7 : DETAILED IMPACT ESTIMATES

	OUTPUT (MILS. \$05)	EMPLOYMENT	LABOR INCOME (MILS. \$05)
1 CROP PRODUCTION	\$0.854	16	\$0.281
2 ANIMAL PRODUCTION	0.600	6	0.170
3 FORESTRY AND FISHING	0.198	2	0.079
4 LOGGING	0.135	1	0.037
5 MINING	0.376	2	0.072
6 ELECTRIC UTILITIES	3.753	6	0.551
7 GAS UTILITIES	1.373	1	0.099
8 OTHER UTILITIES	1.199	5	0.369
9 CONSTRUCTION	7.040	54	2.245
10 FOOD MANUFACTURING	3.547	15	0.545
11 TEXTILES AND APPAREL	0.142	2	0.050
12 WOOD PRODUCT MANUFACTURING	0.483	2	0.111
13 PAPER MANUFACTURING	0.535	2	0.106
14 PRINTING	0.982	10	0.352
15 PETROLEUM AND PRODUCTS	5.302	1	0.073
16 CHEMICAL MANUFACTURING	0.126	0	0.027
17 NONMETALLIC MINERAL PRODUCTS MANUFACTURING	0.415	3	0.107
18 PRIMARY METALS	0.096	0	0.015
19 FABRICATED METALS	0.287	2	0.081
20 MACHINERY MANUFACTURING	0.107	1	0.037
21 COMPUTER AND ELECTRONIC PRODUCT	0.145	3	0.140
22 ELECTRICAL EQUIPMENT	0.021	0	0.006
23 AIRCRAFT AND PARTS	0.017	0	0.004
24 SHIP AND BOAT BUILDING	0.047	0	0.022
25 OTHER TRANSPORTATION EQUIPMENT	0.043	0	0.011
26 FURNITURE	0.371	3	0.117
27 OTHER MANUFACTURING	0.469	4	0.141
28 WHOLESALE TRADE	3.412	27	1.208
29 RETAIL TRADE	16.781	267	6.580
30 TRANSPORTATION AND WAREHOUSING	8.869	65	2.833
31 INFORMATION	4.195	21	2.158
32 FINANCE AND INSURANCE	7.059	51	2.185
33 REAL ESTATE	9.149	57	1.344
34 PROFESSIONAL SERVICES AND MANAGEMENT	14.600	172	6.214
35 EDUCATIONAL SERVICES	12.335	221	4.464
36 HEALTH SERVICES	14.031	188	6.912
37 ARTS, RECREATION, AND ACCOMMODATION	68.915	662	27.074
38 FOOD SERVICES AND DRINKING PLACES	15.209	351	5.348
39 OTHER SERVICES	7.372	129	2.741
40 LABOR INCOME	0.000	0	0.000
41 STATE AND LOCAL GOVERNMENT	45.595	206	8.479
TOTAL	\$210.587	2,558	\$83.387

Summary impacts are included in Table 8, including selected tax impacts. The output, employment and labor income impacts in Table 8 are the same as in Table 7; they are just condensed into a broad set of sectors. Tax revenue impacts are divided into state impacts, and those accruing at the local (King County or

Seattle level). This analysis suggests that Husky athletics generate about \$12.5 million in taxes annually, about \$8.2 million to state government, and about \$4.3 million to local governments.

TABLE 8 : SUMMARY IMPACTS

OUTPUT (\$ MILLIONS)		WASHINGTON	
NATURAL RESOURCES & UTILITIES		\$8.487	
MANUFACTURING & CONSTRUCTION		20.174	
WHOLESALE AND RETAIL TRADE		20.193	
SERVICES		161.733	
TOTAL		\$210.587	
EMPLOYMENT			
NATURAL RESOURCES & UTILITIES		\$39	
MANUFACTURING & CONSTRUCTION		102	
WHOLESALE AND RETAIL TRADE		293	
SERVICES		2,124	
TOTAL		\$2,558	
LABOR INCOME \$ MILLIONS			
NATURAL RESOURCES & UTILITIES		\$1.659	
MANUFACTURING & CONSTRUCTION		4.188	
WHOLESALE AND RETAIL TRADE		7.788	
SERVICES		69.753	
TOTAL		\$83.387	
TAXES	STATE		LOCAL
STATE B&O	\$1.410	SEATTLE B&O @.5 STATE	\$0.705
DIRECT STATE SALES TAX	3.872	LOCAL DIRECT SALES	1.012
INDIRECT SALES TAX (LABOR INCOME)	2.888	INDIRECT LOCAL SALES	0.755
TOTAL	\$8.170	CITY ADMISSIONS	1.100
		HOTEL MOTEL-DIRECT	0.729
TOTAL			\$4.300

IV. CONCLUDING COMMENTS

The limited information available for the purposes of this report has resulted in impact estimates that seem reasonable, but are probably conservative. As indicated at the outset, since much of the data used here was not based on surveys specific to Husky Sports, there is clearly a margin of error. We cannot know the magnitude of this error, unless we have survey data to compare with this analysis.

Like other components of the leisure and recreation sector, such as professional sports, and non-profit arts, college sports also has an economic impact. It is not large in a statewide context, but this analysis suggests that more than 2,000 jobs are supported in the State economy outside of the 500 directly created jobs at Husky Sports. Most of these jobs are probably created in the local area, and are probably held by people whose jobs are also supported by the spending of a wide variety of industries in the regional economy. A model of the type used here develops a “slice” of impacts associated with this specific activity. Other economic impact models would account for other “slices” of economic activity in the aggregate economy.

This analysis did not attempt to isolate “new money” impacts, impacts that would not occur if Husky Sports was not a part of the UW. A lack of data prevented estimates of new money, which appear to be largely related to nonlocal fan spending, and some revenue to Husky Sports from the NCAA and other external sources of support. In other economic impact studies of similar industries, new money has been found to be roughly one-third of overall impacts. Future research could attempt to estimate new money impacts.

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