

**San Diego State University
Center for Hospitality and Tourism Research**



**SAN DIEGO STATE
UNIVERSITY**
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I. Executive Summary

The following report assesses the economic impact on San Diego County of San Diego Pride events which took place from July 18-20, 2014. The report uses an attendance estimate, a survey of non-local attendees and the RIMS II economic multiplier to determine total economic impact. For the purposes of this report, total economic impact is defined as the expenditure of money from sources outside the San Diego area which resulted from hosting the events. Both direct economic impact from non-local attendees, such as spending on lodging, shopping and entertainment, and food and beverage is used to determine the total economic impact, as well as indirect impact which includes additional business generated in the local area resulting from Pride activities.

The total estimated economic impact on San Diego County for Pride is estimated at \$10.94 million. The total is comprised of \$5.67 million of direct impact and \$5.27 million of indirect impact. This is the result of some 100,000 attendees to the parade (19.5% who were non-local) and related preparation for the event.

The majority of these non-local attendees (86%) came to San Diego for the primary purpose of attending the Pride events. Some 49% of this non-local group stayed in a hotel during their visit with an average of 2.53 room nights at \$170.47 per night. An estimated 10,884 hotel room nights were sold during Pride events.

In addition to the direct and indirect impacts listed above, Pride events generated tax revenue for the city of San Diego. The transient occupancy tax of 10.5% generated revenue of \$194,821.00. The San Diego portion of sales tax on food and beverage, entertainment and shopping is estimated at \$95,329.00.



1. San Diego Pride Summary Chart

	2014
Total Economic Impact	\$10.94M
<i>Direct Impact</i>	\$5.67M
<i>Indirect Impact</i>	\$5.27M
TOT Contribution	\$194,822
Sales Tax (Local)	\$95,329
Total Attendees (Estimated)	100,000*
<i>Local Attendees</i>	80,500 (80.5%)
<i>Non-Local Attendees</i>	19,500 (19.5%)
Per Capita Spending (Non-Local)	\$561.03
Total Room Nights	10,884
TMD Room Nights	8,577 (78.8%)

* Attendance total provided by Pride staff



II. Data Collection Methodology

1. The Survey

- An intercept-survey of spectators was conducted during the Pride Parade. The goal of the survey was to assess visitor characteristics and spending patterns for non-local attendees in particular. A 20-item survey was designed specifically for use at Pride. These surveys have been used successfully over the past 8 years for a variety of cultural and sporting events. Items on the survey included questions regarding visitor place of residence, lodging accommodations, expenditures, travel accommodations and basic demographics. If a respondent indicated their place of residence as San Diego, they were only asked demographic related questions.
- To collect responses to the survey items, face-to-face interviews were conducted with randomly-selected attendees. A team of 30 interviewers and 5 supervisors were trained extensively on data collection process to minimize response bias. The goal of the survey was to gain as accurate a picture as possible of attendee behavior. A 60-minute training session was conducted which provided detailed item discussion, interview practice and role playing, as well as a Q&A session. Particular attention was paid to ensuring valid and reliable responses. Anonymity of the responses was ensured by the interviewees and participation was completely voluntary.
- The data collectors were assigned strategic locations around the Pride Parade route. Data were collected before, during and immediately after the parade concluded.

2. The Responses

- A total of 1,045 interviews were conducted for San Diego Pride. Some 39 surveys were either terminated by the respondent or incomplete and removed from the analysis. The restating response rate is 96.3% or 1,006.

3. Attendance

- A critical number used in calculating spectator economic impact is attendance. As San Diego Pride is generally a public event where no tickets or badges are used, an assessment had to be conducted using a third-party vendor. The following was provided by San Diego Pride staff:

“Attendance was calculated by analyzing aerial and ground photographs of the parade route crowd. Martz, Inc. was contracted to take photographs from a helicopter, and photographers who volunteer their services at Pride took photographs from the ground.”



These photographs were used to calculate crowd densities at various points along the route. Population counts within these densities were extrapolated to areas of similar density along the route to arrive at a total attendance count. Populations within a number of these areas were also hand counted from the photographs to verify the densities and attendance count.”

- While SDSU did not conduct this analysis, we acknowledge that this is a particularly effective method for determining crowd size.
- The final estimate provided to us for attendance was 100,000. This is the group that were targeted in the survey process.



III. San Diego Pride Analysis

1. Economic Impact of San Diego Pride

- San Diego Pride events took place over July 18-20, 2014 throughout Central San Diego. These events include a 5K run, music festival, parade, block party and rally. The largest event of the weekend is the Pride Parade which begins in Hillcrest and ends at Balboa Park. Some 100,000 people attended the parade and was the focus of the current analysis.
- The resulting economic impact of visitors to San Diego was calculated by attendance figures, a survey of non-local attendees and the RIMS II economic multiplier¹ to determine total economic impact. Total economic impact is defined as the expenditure of money from sources outside the San Diego area which resulted from hosting the event. Both direct economic impact from non-local attendees, such as spending on lodging, shopping and entertainment, and food and beverage is used to determine the total economic impact, as well as indirect impact which includes additional business generation in the local area resulting from the events.
- The following tables provide an overview of San Diego Pride's economic impact:

2014 San Diego Pride Direct Economic Impact*		
Spending Category	Spending* (\$ Million)	Spending* (Percent)
Lodging	1.86	32.7%
Food & Beverage	2.12	37.3%
Shopping	.847	15%
Entertainment	.847	15%
Total	5.67	100%

*All totals rounded



2014 San Diego Pride Estimated Economic Impact			
Total Economic Impact (Millions of \$)	Direct Economic Impact (Millions of \$)	Indirect Economic Impact (Millions of \$)	Total Hotel Room Nights
10.94	5.67	5.27	10,884

- Non-local respondents spent an average of \$126.70 on food and beverage during their stay with a daily median of \$50.00 per day. In addition, non-locals spent an average of \$40.98 on shopping and a median of \$20.00 per day. Finally, the average spent on entertainment was \$39.91 during their stay with a daily median of \$20.00.
- Finally, many of the surveyed non-local attendees planned to attend other attractions in the San Diego area:

Attractions Visited while in San Diego Pride Non-Local Respondents			
Festival	28%	Waterpark	2%
Beach	17%	Sea World	2%
Zoo	11%	Golf	.2%
Mexico	6%	LEGOLAND	0%

2. San Diego Pride Attendees

- Of the 100,000 estimated attendees², an estimated 19.5% or 19,500 spectators were non-local attendees.

Local vs. Non-Locals San Diego Pride Attendees		
	Percentage	Actual
Local (San Diego)	80.5%	80,500
Non-local	19.5%	19,500
Total	100%	100,000



- Some 85.7% of the non-local respondents reported that the Pride was their main reason for visiting San Diego.
- Attendees came from various locations:

Where Do Pride Attendees Live?*	
San Diego County	81%
Elsewhere in California	11%
Arizona or Nevada	2%
State Other than CA, AZ or NV	4%
Mexico	1%
Other Country	1%

* Rounded

3. Accommodations

- The following section is broken down into two areas. The first calculates all hotel room nights as a result of the Pride. The second section, provides a more detailed analysis of hotel room nights generated in the San Diego Tourism Marketing District (TMD) hotel properties.

Attendee Room Nights

- Over 48% of visitors to San Diego stayed in a hotel during their visit with an average of 2.53 room nights at \$170.47 per night.
- An estimated 10,884 spectator hotel room nights were sold during Pride.



San Diego Tourism Marketing District (TMD) Hotel Room Nights

- The TMD was established to provide tourism marketing dollars for San Diego. In order to justify event funding and to comply with local laws as regulations, an analysis must be conducted which isolates those hotel properties that benefit from TMD dollars. The following illustrates the process used to do just that.
- In addition to the survey process indicated above, respondents were asked if they were comfortable sharing their hotel name. Of the 203 non-local respondents who completed the survey, 33 or 16.2% provided their hotel name.
- The next step in the analysis was to cross check each survey response with a master list of TMD properties to assess its inclusion. Some 26 or 78.8% of the hotels appeared on the TMD list.
- Using this subset as a sample, it can be inferred statistically that of the 10,884 visitor room nights generated ($10,884 \times 78.8\%$), 8,577 of these room nights were sold in TMD hotel properties.



4. Other Expenditures

- Above and beyond the spectator spending discussed here, the Pride organizing staff spent significant dollars in executing the various events over Pride weekend. These dollars went directly to local businesses, vendors or municipalities. It is not known whether some of this money would have been spent on other events or endeavors and is therefore not included in the economic impact total.

Category	Total ³
Beverages	\$48,000
Beverage garden staffing	\$17,500
Festival attractions and decorations	\$21,300
Carts and radios	\$14,200
Trash pickup, street sweeping	\$29,400
Fencing	\$19,300
Ice	\$7,500
Barricades, cones, traffic signage	\$17,000
City police, traffic, and fire-rescue	\$58,000
Portable restrooms	\$18,000
Heavy Equipment	\$4,000
Power	\$49,000
Merchandise	\$8,500
Security	\$26,000
Storage and production trailers	\$9,000
Shuttle busses	\$11,500
Rentals	\$85,400
Stages, structures, and audio-visual equipment	\$99,300
Contract personnel	\$45,000
Design and printing	\$6,300
Parking facility rental	\$3,700
Vehicle rental	\$2,500
Food	\$7,500
T-shirts	\$6,500
Miscellaneous supplies	\$10,000
Total	\$624,400

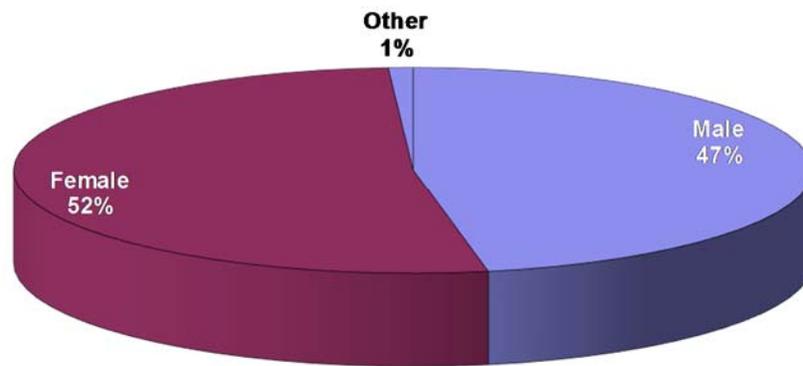
Source: San Diego Pride Staff



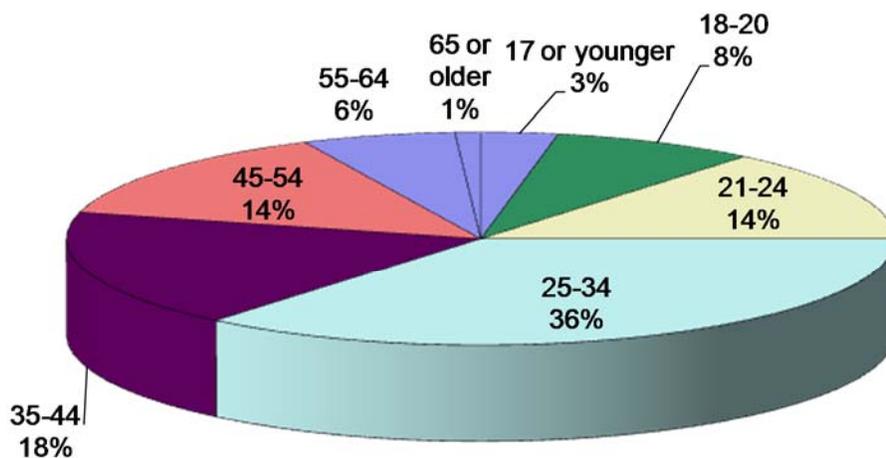
5. Visitor Demographics & Profile

- Additional demographic information was collected during the parade for both local and non-local attendees. The following charts provide an overview of each demographic question. Following the charts, a summary profile is provided.

Gender of Respondents

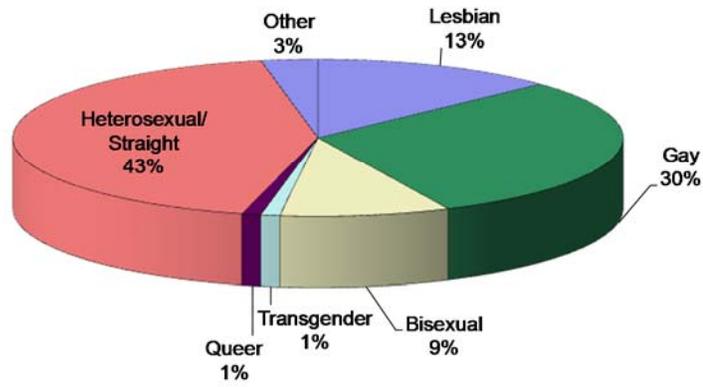


Age of Respondents

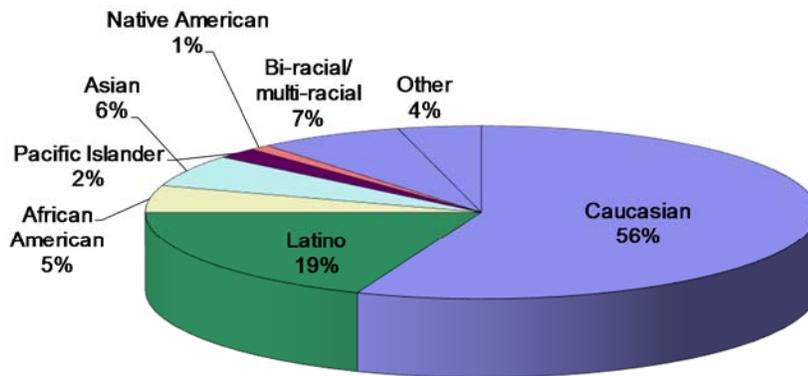




Identity- How do you identify yourself?



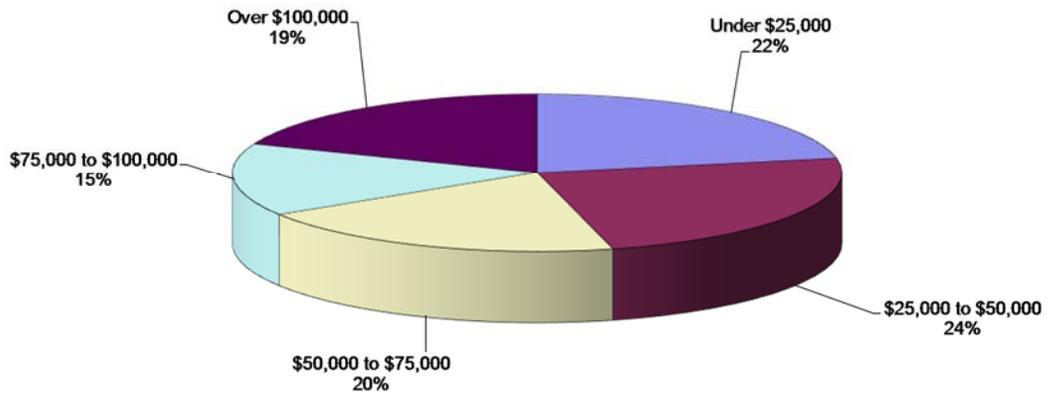
Ethnicity





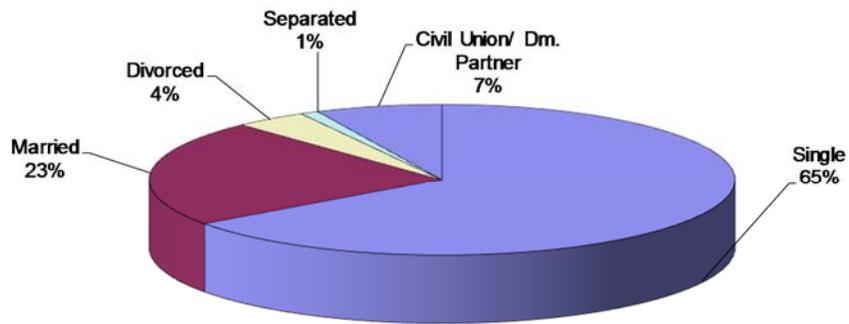
Income

Respondent Annual Income



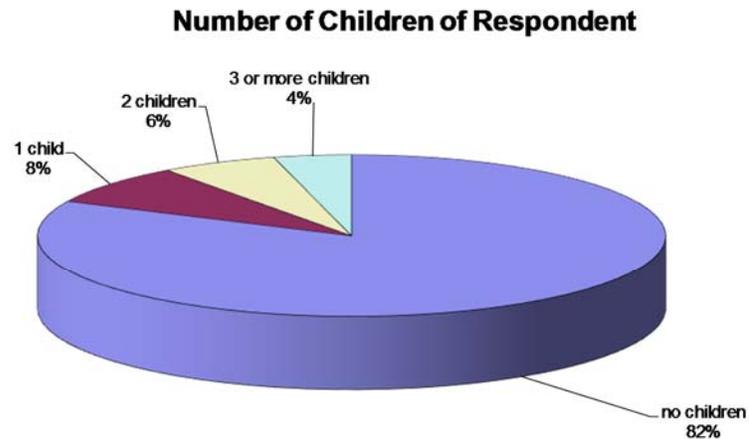
Marital Status

Marital Status

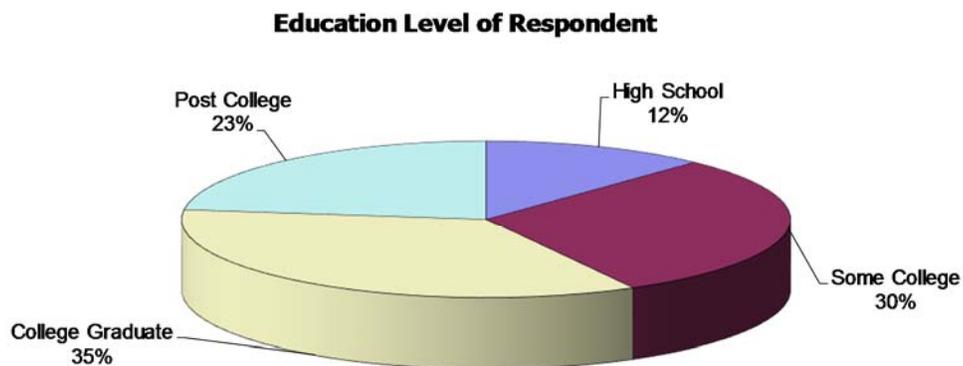




Number of Children



Education Level



6. Pride Attendee Profile

- Based on the data collected during Pride events, some generalizations may be inferred regarding Pride attendees. In addition, a profile of a typical Pride attendee can be deduced.

General Comments Regarding Attendees

- The majority of Pride attendees are local San Diego Residents. Just over 80% of those surveyed reside in San Diego.
- The next largest group of attendees reside in other parts of California. Some 11% were from areas such as Los Angeles, San Francisco and other areas in California.
- While the majority attendees to Pride events were from the US, some 2,000 visitors reside in another country.



-
- Word-of-mouth seems to be the largest driver of Pride attendance with more than half (52%) of the respondents indicating this was how they heard about Pride.
 - More than 60% of those surveyed had been to Pride before.
 - The data suggest that past attendance to Pride events is split virtually into three large segments; first year attendees, two-five year attendees and those from six to eleven plus years.
 - In addition to attendance at the Pride Festival (28%), attendees enjoy both beaches (17%) and the San Diego Zoo (11%).
 - Those who attend Pride events from out-of-town are for the most part couples or pairs (61%)
 - Gender does not appear to impact attendance to Pride events with almost an even split of males (47%) and females (52%).
 - The plurality of Pride attendees are between the ages of 25-34 (36%).
 - The plurality of Pride attendees identify themselves as heterosexual (43%) followed by 43% who identify themselves as gay or lesbian.
 - More than half of the attendees to Pride are Caucasian (56%) with a large portion of Latino (19%) attendees as well.
 - No clear group emerged from the analysis in terms of annual income. The largest group (54%) responded that they earned \$50,000 per year or more.
 - The majority of Pride attendees are single (65%) with some 23% reporting their status as married.
 - The overwhelming majority (82%) of Pride attendees do not have children.
 - No clear group emerged from the data in terms of education. The largest group (35%) indicated they were college graduates.

7. Profile Summary

- Based on data collected during the 2014 Pride Parade, the following could be inferred regarding the traditional Pride attendee.

The typical San Diego Pride attendee lives in San Diego and has attended Pride previously. He or she is likely to attend the Pride Festival and more than likely will attend with one other person. This individual is between 25-34 years old and is as likely to identify themselves as heterosexual as either gay or lesbian. This person is a single, Caucasian, college graduate with no children and earns approximately \$50,000 per year.



IV. San Diego Pride Charts

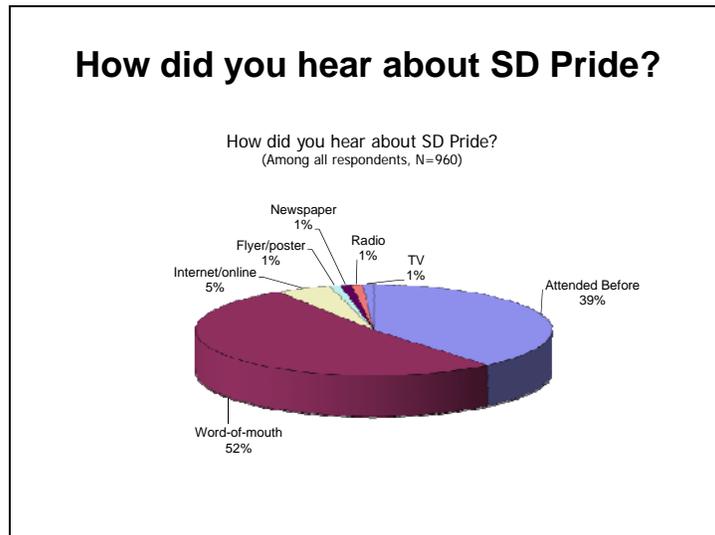
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**San Diego LGBT Pride
Intercept Survey**
July 2014

San Diego State University

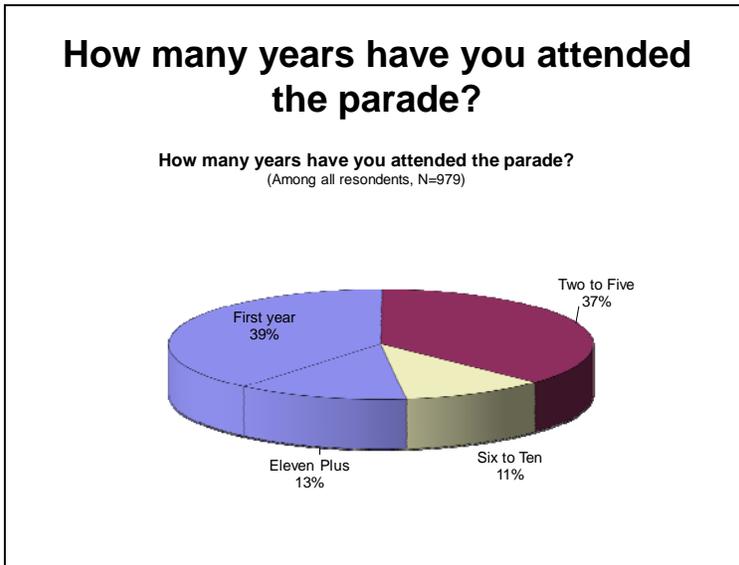


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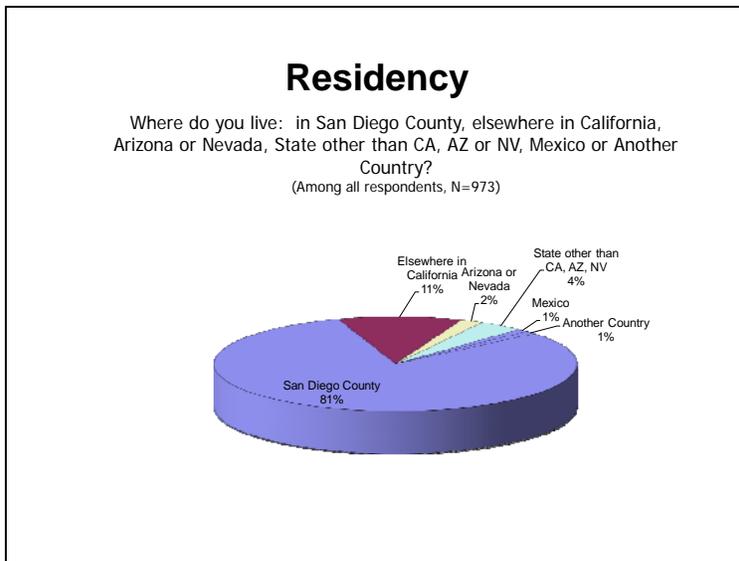




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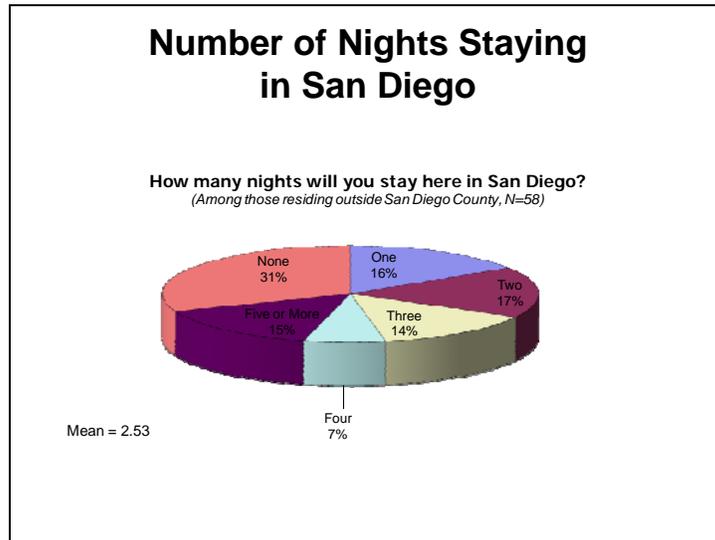


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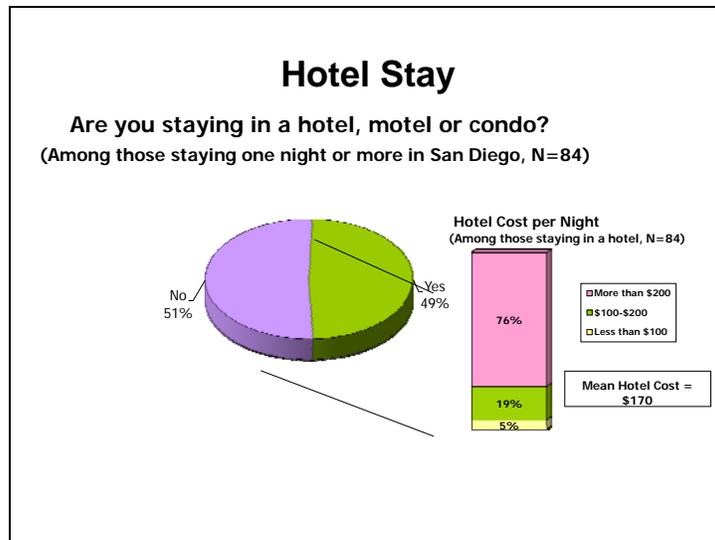




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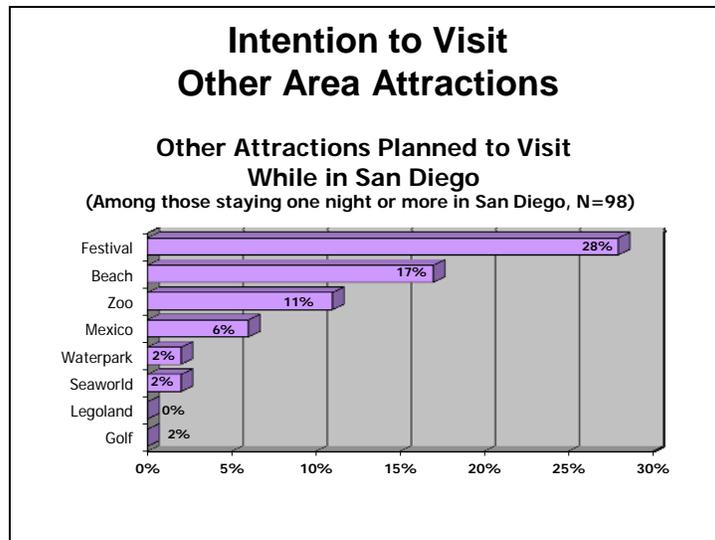




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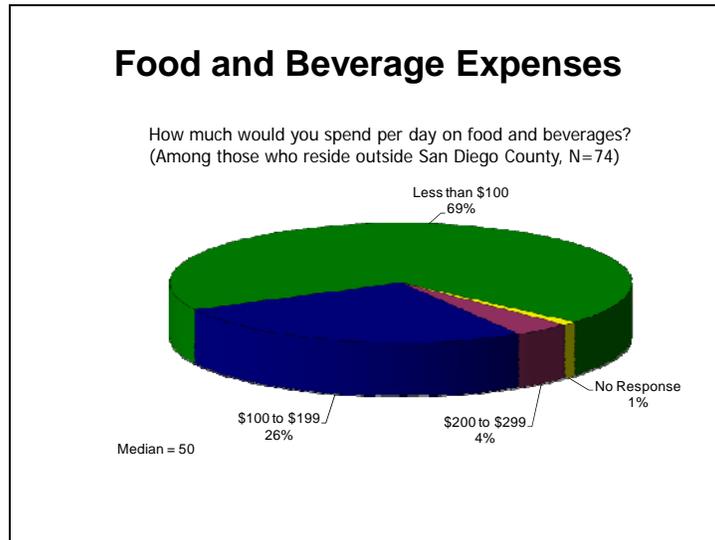


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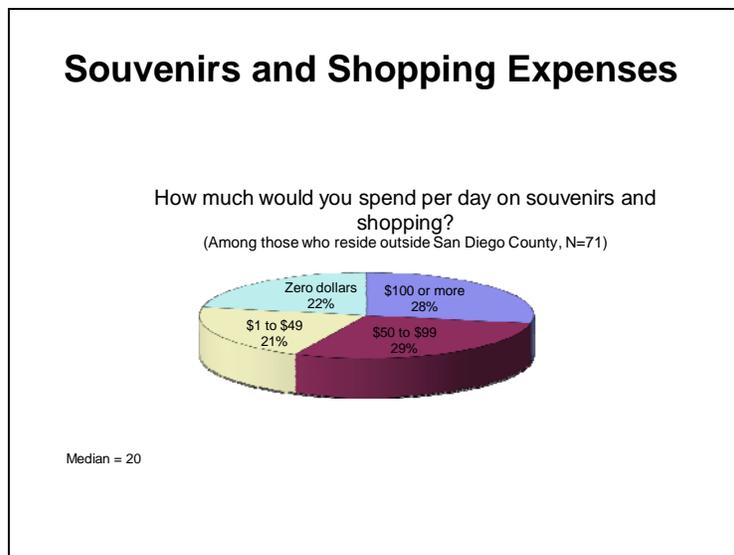




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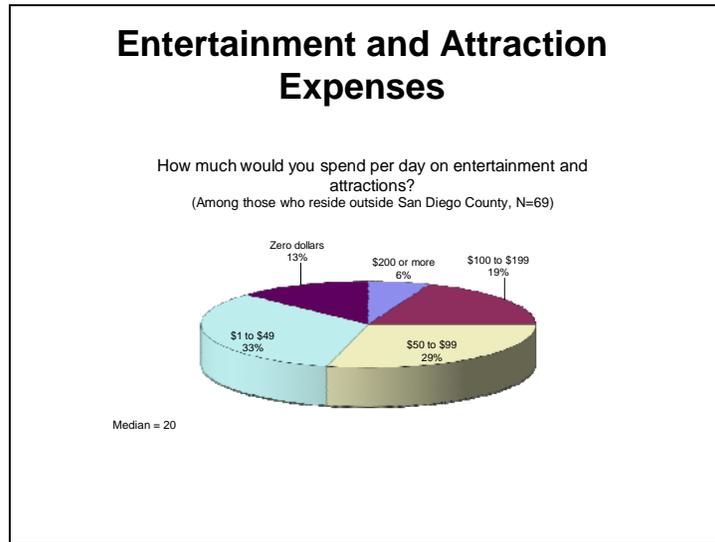


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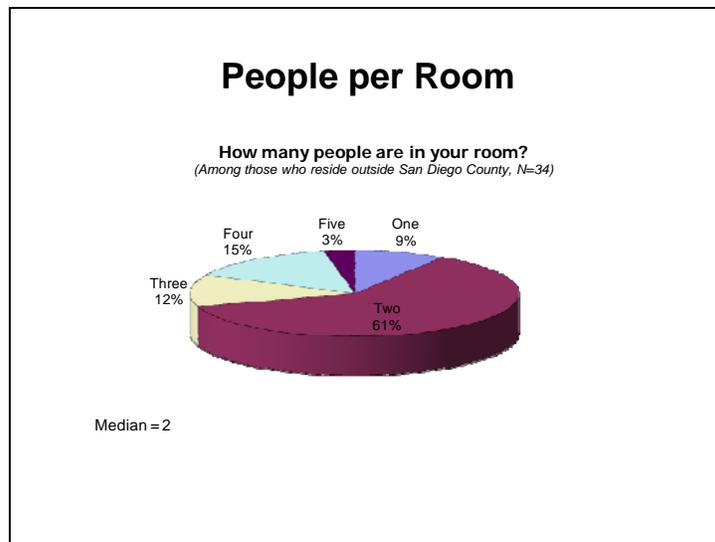




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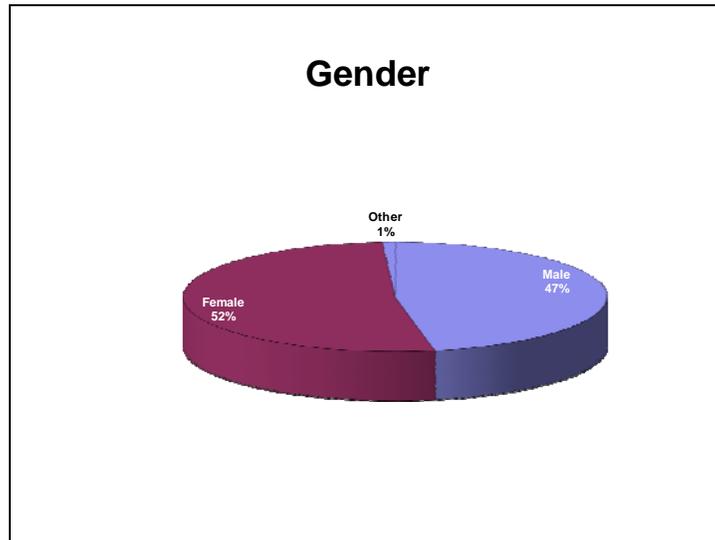


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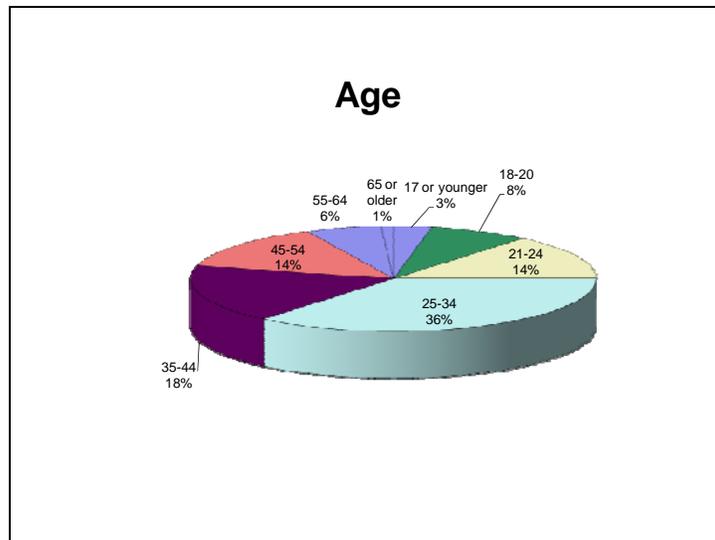




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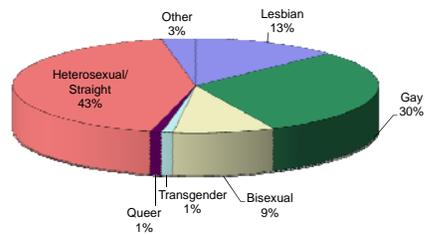
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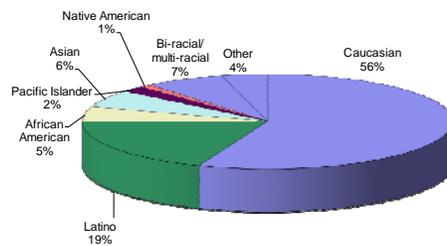
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How do you identify yourself?



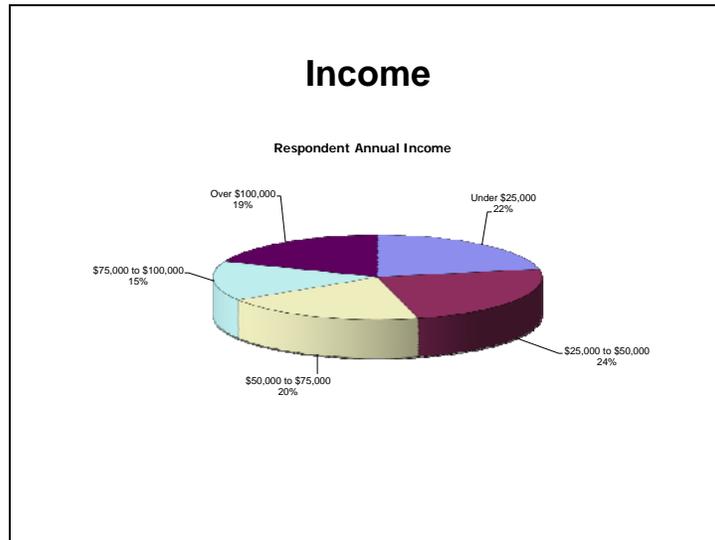
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Ethnicity

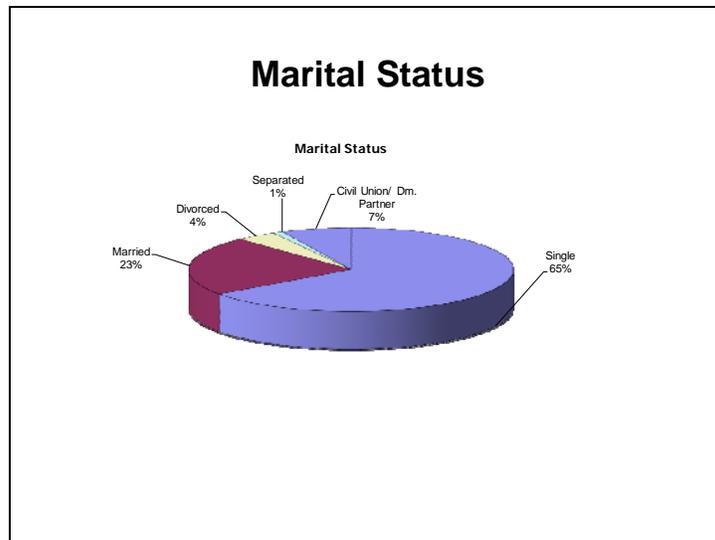




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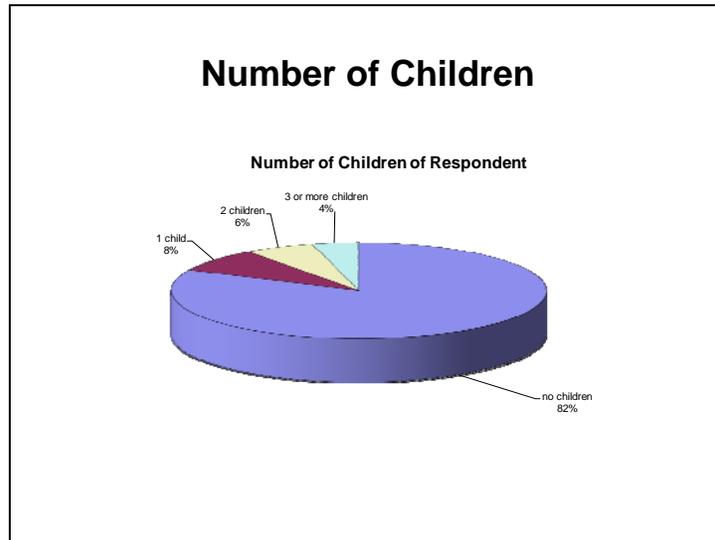


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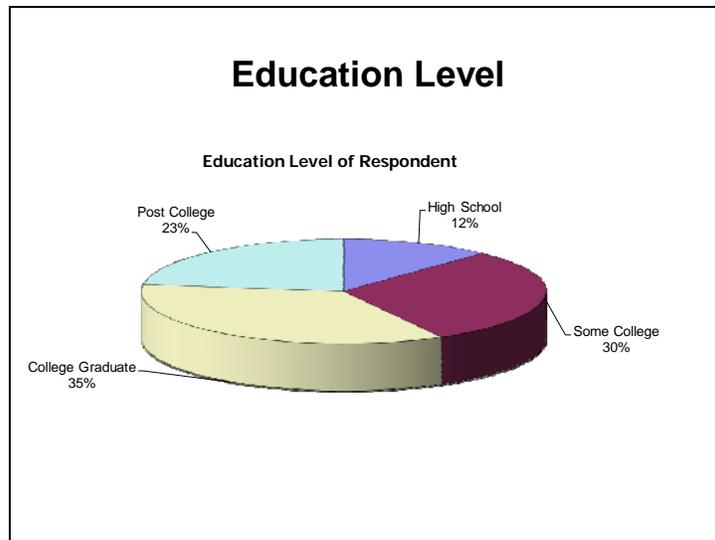




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Slide 20





V. References

¹ <http://www.bea.gov/bea/regional/rims/>

² San Diego Pride Staff

³ Totals provided by San Diego Pride Staff