2018 San Diego Pride
Economic Impact Analysis

San Diego State University
Center for Hospitality and Tourism Research
Table of Contents

I. EXECUTIVE SUMMARY .................................................................................................................. 3
   1. SAN DIEGO PRIDE SUMMARY CHART .................................................................................... 4

II. DATA COLLECTION METHODOLOGY ...................................................................................... 5
   1. THE SURVEY ........................................................................................................................... 5
   2. THE RESPONSES ..................................................................................................................... 5
   3. ATTENDANCE ............................................................................................................................ 5

III. SAN DIEGO PRIDE ANALYSIS ............................................................................................... 7
   1. ECONOMIC IMPACT OF SAN DIEGO PRIDE ........................................................................ 7
   2. SAN DIEGO PRIDE ATTENDEES ........................................................................................... 9
   3. ACCOMMODATIONS ............................................................................................................... 9
   4. OTHER EXPENSES .................................................................................................................. 11
   5. VISITOR DEMOGRAPHICS & PROFILE ................................................................................. 11
   6. PRIDE ATTENDEE PROFILE ................................................................................................. 17

IV. SAN DIEGO PRIDE CHARTS ..................................................................................................... 19

V. REFERENCES ............................................................................................................................. 31
I. Executive Summary

The following report assesses the economic impact on San Diego County of San Diego Pride events which took place from July 14-15, 2018. 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 economic impact on San Diego County for Pride is estimated at $26.6 million. The total is comprised of $13.8 million of direct impact and $12.8 million of indirect impact. This is the result of some 251,000 attendees to the parade (18.5% who were non-local) and related preparation for the event.

The majority of these non-local attendees (77%) came to San Diego for the primary purpose of attending the Pride events. Some 37.5% of this non-local group stayed in a hotel during their visit with an average of 2.83 room nights at $152.00 per night. An estimated 15,760 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 $251,527. The San Diego portion of sales tax on food and beverage, entertainment and shopping is estimated at $284,859.

Finally, Pride spent a significant amount of money during its events, which flowed into the local economy. Expenses such as trash pick-up, police and fire, rentals, personnel and a variety of professional services which resulted directly from Pride activities totaled some $974,376.
1. *San Diego Pride Summary Chart*

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Economic Impact</strong></td>
<td>$10.94M</td>
<td>$26.6M</td>
</tr>
<tr>
<td><strong>Direct Impact</strong></td>
<td>$5.67M</td>
<td>$13.8M</td>
</tr>
<tr>
<td><strong>Indirect Impact</strong></td>
<td>$5.27M</td>
<td>$12.8M</td>
</tr>
<tr>
<td><strong>TOT Contribution</strong></td>
<td>$194,822</td>
<td>$251,527</td>
</tr>
<tr>
<td><strong>Sales Tax (Local)</strong></td>
<td>$95,329</td>
<td>$284,859</td>
</tr>
<tr>
<td><strong>Total Attendees (Estimated)</strong></td>
<td>100,000*</td>
<td>251,839*</td>
</tr>
<tr>
<td><strong>Local Attendees</strong></td>
<td>80,500 (80.5%)</td>
<td>205,299 (81.5%)</td>
</tr>
<tr>
<td><strong>Non-Local Attendees</strong></td>
<td>19,500 (19.5%)</td>
<td>46,540 (18.5%)</td>
</tr>
<tr>
<td><strong>Per Capita Spending (Non-Local)</strong></td>
<td>$561.03</td>
<td>$571.55</td>
</tr>
<tr>
<td><strong>Total Room Nights</strong></td>
<td>10,884</td>
<td>15,760</td>
</tr>
<tr>
<td><strong>TMD Room Nights</strong></td>
<td>8,577 (78.8%)</td>
<td>11,363 (72.1%)</td>
</tr>
</tbody>
</table>

* 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 23-item survey was designed specifically for use at Pride. These surveys have been used successfully over the past 12 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 4 supervisors were trained extensively on the 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 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 interviewers 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 907 interviews were conducted for San Diego Pride.

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 Pride:

  “Attendance was calculated by analyzing aerial and ground photographs of the parade route crowd. Photographs and video were acquired through a partnership with Hale Media as well as from our who volunteer-team as both utilized drones and ground level photographers to capture images. 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 and in person during the event 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 251,839. This is the group that was targeted in the survey process. The San Diego Pride staff identified two main reasons for the increase in Pride attendance. The first is a shift in the political environment where much of the Pride community felt vulnerable to changing policy that may not be in the best interest of the LGBTQ community. Second, a full time employee was hired with the specific goal of increasing attendance to Pride events.

- Pride attendees stayed for an average of 4.88 hours in 2018

- Some 81% of respondents indicated they would return to San Diego again outside of the Pride season.
III. San Diego Pride Analysis

1. Economic Impact of San Diego Pride

- San Diego Pride events took place over July 14-15, 2018 throughout Central San Diego. These events include a 5K run, two-day festival, parade, and rally. The largest event of the weekend is the Pride Parade which begins in Hillcrest and ends at Balboa Park. Some 250,000 people attended the parade, which 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 multiplier 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:

<table>
<thead>
<tr>
<th>Spending Category</th>
<th>Spending* ($ Million)</th>
<th>Spending* (Percent)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging</td>
<td>$2.4</td>
<td>17.4%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>$4.05</td>
<td>29.3%</td>
</tr>
<tr>
<td>Shopping</td>
<td>$3.3</td>
<td>24%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>$4.05</td>
<td>29.3%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$13.8</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

*All totals rounded
<table>
<thead>
<tr>
<th>Total Economic Impact (Millions of $)</th>
<th>Direct Economic Impact (Millions of $)</th>
<th>Indirect Economic Impact (Millions of $)</th>
<th>Total Hotel Room Nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>$26.6</td>
<td>$13.8</td>
<td>$12.8</td>
<td>15,760</td>
</tr>
</tbody>
</table>

- Non-local respondents spent an average of $150.00 on food and beverage during their stay with a daily median of $40.00 per day. In addition, non-locals spent an average of $79.00 on shopping and a median of $32.50 per day. Finally, the average spent on entertainment was $101.00 during their stay with a daily median of $40.00.

- Finally, many of the surveyed non-local attendees planned to attend other attractions in the San Diego area:

**Other Attractions Planned to Visit While in San Diego**
(Among those staying one night or more in San Diego)
2. San Diego Pride Attendees

- Of the 251,839 estimated attendees\(^2\), an estimated 18.5% or 46,540 spectators were non-local attendees.

<table>
<thead>
<tr>
<th>Local vs. Non-Locals San Diego Pride Attendees</th>
<th>Percentage</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local (San Diego)</td>
<td>81.5%</td>
<td>205,299</td>
</tr>
<tr>
<td>Non-local</td>
<td>18.5%</td>
<td>46,540</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100%</strong></td>
<td><strong>100,000</strong></td>
</tr>
</tbody>
</table>

- Some 77% of the non-local respondents reported that Pride was their main reason for visiting San Diego.

- Attendees came from various locations:

<table>
<thead>
<tr>
<th>Where Do Pride Attendees Live?*</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Diego County</td>
</tr>
<tr>
<td>Elsewhere in California</td>
</tr>
<tr>
<td>Arizona or Nevada</td>
</tr>
<tr>
<td>State Other than CA, AZ or NV</td>
</tr>
<tr>
<td>Mexico</td>
</tr>
<tr>
<td>Other Country</td>
</tr>
</tbody>
</table>

* Rounded

3. Accommodations

- The following section is broken down into two areas. The first calculates all hotel room nights as a result of 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 37.5% of visitors to San Diego stayed in a hotel during their visit with an average of 2.83 room nights at $152.00 per night.

- An estimated 15,760 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 and 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. 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 72.1% of the hotels appeared on the TMD list.

- Using this subset as a sample, it can be inferred statistically that of the 15,760 visitor room nights generated (15,760 x 72.1%), 11,363 of these room nights were sold in TMD hotel properties.
4. Other Expenses

- In addition to spectator spending, Pride spent significant dollars to execute the events. It is not known whether some of this money would have been spent otherwise and is not included in economic impact.

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessibility Costs &amp; ASL Interpretation</td>
<td>$3,196.11</td>
</tr>
<tr>
<td>Barricades, Cones &amp; Traffic Signage</td>
<td>$13,620.00</td>
</tr>
<tr>
<td>Beverage Garden Rentals &amp; Staffing</td>
<td>$89,879.00</td>
</tr>
<tr>
<td>Carts and Radios</td>
<td>$14,209.64</td>
</tr>
<tr>
<td>Children's Garden Equipment &amp; Rentals</td>
<td>$3,773.28</td>
</tr>
<tr>
<td>City Police, Traffic &amp; Fire-Rescue</td>
<td>$71,473.59</td>
</tr>
<tr>
<td>Contract Personnel</td>
<td>$53,658.29</td>
</tr>
<tr>
<td>Credit Card Processing</td>
<td>$27,636.46</td>
</tr>
<tr>
<td>Design and Printing</td>
<td>$12,393.67</td>
</tr>
<tr>
<td>Event Insurance</td>
<td>$17,360.58</td>
</tr>
<tr>
<td>Festival Mapping Costs</td>
<td>$4,000.00</td>
</tr>
<tr>
<td>Ice</td>
<td>$5,973.66</td>
</tr>
<tr>
<td>Parade &amp; Festival Advertising</td>
<td>$10,021.86</td>
</tr>
<tr>
<td>Portable Restrooms</td>
<td>$40,955.79</td>
</tr>
<tr>
<td>Power</td>
<td>$51,605.08</td>
</tr>
<tr>
<td>Promotional Merchandise</td>
<td>$3,800.45</td>
</tr>
<tr>
<td>Security</td>
<td>$56,068.43</td>
</tr>
<tr>
<td>Shuttle Bus Rentals</td>
<td>$15,590.00</td>
</tr>
<tr>
<td>Specialty Rental Equipment &amp; Parking Facility</td>
<td>$16,859.00</td>
</tr>
<tr>
<td>Storage &amp; Production Trailers</td>
<td>$2,864.74</td>
</tr>
<tr>
<td>Supplies</td>
<td>$4,831.00</td>
</tr>
<tr>
<td>Tenting, Stages, A/V &amp; Entertainment</td>
<td>$408,156.47</td>
</tr>
<tr>
<td>Ticket Printing and Fees</td>
<td>$8,643.15</td>
</tr>
<tr>
<td>Trash Pick up and Street Sweeping</td>
<td>$21,553.49</td>
</tr>
<tr>
<td>Volunteer Administration and Costs</td>
<td>$16,251.82</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$974,375.56</strong></td>
</tr>
</tbody>
</table>

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 at Birth

Gender Identity
How do you identify yourself?

Age of Respondents
Ethnicity

- Caucasian: 52%
- Latino: 23%
- African American: 6%
- Asian: 6%
- Native American: 1%
- Pacific Islander: 2%
- Bi-racial/multi-racial: 7%
- Other: 3%

Income

- $50,000-$75,000: 22%
- $25,000-$50,000: 28%
- $75,000-$100,000: 13%
- Under $25,000: 20%
- Over $100,000: 17%
Marital Status

- Single: 61%
- Married: 28%
- Divorced: 7%
- Civil Union/Dom. Partner: 3%
- Separated: 1%

Number of Children

- 0: 74%
- 1: 11%
- 2: 10%
- 3+: 5%
In addition to the demographic characteristics shown here, an assessment of transgender attendees was conducted as well. Based on the survey, some 5.2% of attendees were identified as transgender.
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 of attendees to Pride events were from the US, some 2,500 visitors reside in another country. These countries include:
  - Argentina
  - Bahrain
  - Bangladesh
  - Belgium
  - Bulgaria
  - Canada
  - Chile
  - China
  - Denmark
  - England
  - Finland
  - France
  - Germany
  - Grenada
  - Israel
  - Italy
  - Japan
  - Kuwait
  - Mexico
  - Pakistan
  - Papua New Guinea
  - Poland
  - Portugal
  - Singapore
  - Spain
  - Sweden
  - Turkey
  - Turks and Caicos Islands
  - United Kingdom
  - Vietnam
In addition to attendance at Pride (61%), attendees enjoy both beaches (49%) and the San Diego Zoo (16%).

Gender does not appear to impact attendance to Pride events with almost an even split of males (45%) and females (51%). Some 4% report intersex, non-binary or other.

The plurality of Pride attendees are between the ages of 25-34 (27%).

The plurality of Pride attendees identify themselves as heterosexual (42%) followed by 58% who identify themselves as gay, lesbian, bisexual, queer or other.

More than half of the attendees to Pride are Caucasian (52%) with a large portion of Latino (23%) attendees as well. The Latino proportion increased some 5% since 2014.

No clear group emerged from the analysis in terms of annual income. The largest group (28%) responded that they earned between $25,000 $50,000 per year.

The majority of Pride attendees are single (61%) with some 28% reporting their status as married and 3% indicating Civil Union or domestic partner.

The overwhelming majority (74%) of Pride attendees do not have children.

No clear group emerged from the data in terms of education. The largest group (35%) indicated they attended some college.
IV. San Diego Pride Charts

Slide 1

San Diego LGBT Pride Intercept Survey
July 2018
San Diego State University

Slide 2

How did you hear about SD Pride?
(Among all respondents, N=886)

- Attended Before: 40%
- Word of Mouth: 46%
- Internet/online: 9%
- Flyer/poster: 2%
- Newspaper/Print: 1%
- Radio: 1%
- TV: 1%
Slide 3

How many years have you attended the parade?

How many years have you attended the parade?
(Among all respondents, N=886)

First Year 41%
6 to 10 12%
2 to 5 26%
20 or more 11%

Slide 4

Residency

Where do you live: in San Diego County, elsewhere in California, Arizona or Nevada, State other than CA, AZ or NV, Mexico or Another Country?
(Among all respondents, N=893)

San Diego 81%
California (Outside SD) 11%
Arizona or Nevada 4%
State other than CA, AZ, NV 1%
Mexico 1%
Another Country 1%
Slide 5

Number of Nights Staying in San Diego
How many nights will you stay here in San Diego?
(Among those residing outside San Diego County)

- 0 nights: 20%
- 1 night: 27%
- 2 nights: 19%
- 3 nights: 17%
- 4 nights: 10%
- 5 or more nights: 7%

Mean = 2.83
Median = 3

Slide 6

Hotel Stay
Are you staying in a hotel?
(Among those staying one night or more in San Diego)

- No: 62.5%
- Yes: 37.5%

Hotel Cost per Night
(Among those staying in a hotel)

- Less than $100: 40%
- $100-$200: 35%
- More than $200: 25%

Mean Hotel Cost = $152
Slide 7

Pride Main Reason for Visit

Is Pride the main reason for your visit?
(Among those residing outside San Diego County)

Yes 77%
No 23%

Slide 8

Intention to Visit Other Area Attractions

Other Attractions Planned to Visit While in San Diego
(Among those staying one night or more in San Diego)
Slide 9

Food and Beverage Expenses
How much would you spend per day on food and beverages?
(Among those who reside outside San Diego County, N=105)

- Less than $100: 71%
- $100 to $199: 12%
- $200 to $299: 8%
- More than $300: 9%

Median $40
Mean $150

Slide 10

Souvenirs and Shopping Expenses
How much would you spend per day on souvenirs and shopping?
(Among those who reside San Diego County, N = 74)

- $0: 9%
- $1 to $49: 51%
- $50 to $99: 15%
- $100 or more: 25%

Median $32.5
Mean $79
Slide 11

**Entertainment and Attraction Expenses**

How much would you spend per day on entertainment and attraction expenses?
(Among those who reside San Diego County, N = 77)

- $0: 6%
- $1 to $49: 51%
- $50 to $99: 13%
- $100 or more: 30%

Median $40
Mean $101

Slide 12

**People per Room**

How many people are in your room?
(Among those who reside San Diego County and stayed more than one night, N = 32)

- 1: 19%
- 2: 37%
- 3: 28%
- 4: 16%

Mean 2.41
Mean 2
Slide 13

Return to San Diego

Will you return to San Diego outside of Pride season?
(Among all respondents, N=780)

- Yes: 81%
- No: 2%
- Unsure: 17%

Slide 14

Gender at Birth

- Male: 47%
- Female: 51%
- Intersex: 1%
- Other: 1%
Slide 15

Gender Identity

- Male: 45%
- Female: 51%
- Intersex: 1%
- Non-Binary: 2%
- Other: 1%

Slide 16

How do you identify yourself?

- Heterosexual/Straight: 42%
- Gay: 25%
- Lesbian: 12%
- Bisexual: 13%
- Queer: 3%
- Other: 5%
Slide 17

Age

- 17 or younger: 4%
- 18-20: 13%
- 21-24: 16%
- 25-34: 27%
- 35-44: 18%
- 45-54: 12%
- 55-64: 8%
- 65 or older: 3%

Slide 18

Ethnicity

- Caucasian: 52%
- Latino: 23%
- African American: 6%
- Asian: 5%
- Pacific Islander: 2%
- Native American: 1%
- Bi-racial/multi-racial: 7%
Slide 19

Annual Household Income

- Under $25,000: 20%
- $25,000 - $50,000: 28%
- $50,000 - $75,000: 22%
- $75,000 - $100,000: 13%
- Over $100,000: 17%

Slide 20

Marital Status

- Single: 61%
- Married: 28%
- Separated: 1%
- Divorced: 7%
- Civil Union/Dom. Partner: 3%
- Single: 61%
Slide 21

Number of Children

0 74%
1 11%
2 10%
3+ 5%

Slide 22

Education Level

Grad College 19%
College Grad 33%
Some College 35%
High School 13%
How many hours will you attend the Parade today?

- 1 hour: 2%
- 2 hours: 9%
- 3 hours: 18%
- 4 hours: 22%
- 5 hours: 20%
- 6 hours: 13%
- 7 hours: 0%
- 8 hours or more: 4%
- 9 hours or more: 12%

Mean 4.88
Median 5
V. References


2. San Diego Pride Staff

3. Totals provided by San Diego Pride Staff

4. San Diego Pride ticket data