



**SUMMARY PROFILE OF  
SDCC PRIMARY BUSINESS EVENT  
VISITORS TO SAN DIEGO  
2008-2015**

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## INTRODUCTION

This report summarizes the characteristics and direct economic value of visitors to San Diego County for “primary events”<sup>1</sup> held at the San Diego Convention Center (SDCC) during 2015. This 2015 report compares findings and trends with prior studies conducted for 2008 to 2013. No survey effort was conducted in 2010, 2012 or 2014. A total of 4,005 face-to-face interviews were conducted with visitors throughout San Diego County during 2015, including 487 face-to-face interviews with SDCC primary event attendees. Residents of San Diego County are not included in the San Diego visitor survey and are not included in this SDCC visitor analysis as is explained below.

Including residents of San Diego, there were 553,000 registered attendees for primary events at the SDCC during 2015.<sup>2</sup> From the survey data combined with event registration data it was estimated that 492,000 of the registered event attendees were visitors and 61,000 of the registered attendees were residents of San Diego County. The 492,000 registered event attendees from out-of-county were accompanied by 35,000 non-registered friends and relatives, yielding an estimated 527,000 total SDCC primary event visitors to San Diego. Nearly 92% (483,000) of these SDCC primary event visitors reported hotel accommodations in San Diego for a total of 255,000 hotel rooms. These 255,000 hotel rooms were rented for an average of almost 3.8 nights, generating an estimated 956,000 total hotel room nights during 2015.

The 492,000 visiting primary event attendees spent an average of \$1,431 each in San Diego (including spending for the 35,000 non-registered members of their travel party and \$395 in association and exhibitor company spending per event attendee). Total direct spending generated in San Diego County by the 492,000 SDCC primary event attendees was about \$704

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<sup>1</sup> See study definitions listed on page 2.

<sup>2</sup> Attendance data for primary events at the SDCC were provided by Mark Emch, V.P. of Finance, SDCCC.

million in 2015. Lodging spending generated by SDCC primary events was estimated at \$255 million including about \$23.8 million in transient lodging taxes and nearly \$4.5 million in TMD assessment revenue.

Table 1  
**Economic Summary of SDCC Primary Event Attendees and Their Travel Party\***  
**(2008-2015)**

<b>Category</b>	<b>2008</b>	<b>2009</b>	<b>2011</b>	<b>2013</b>	<b>2015</b>
Total SDCC Primary Event Visitors to San Diego County	691,000	542,000	498,000	455,000	527,000
Percent of SDCC Visitors with Hotel Accommodations	82%	87%	91%	93%	92%
SDCC Primary Event Visitors with Hotel Accommodations	567,000	472,000	453,000	423,000	483,000
People Per Room	1.61	1.50	1.53	1.83	1.90
Mean Nights per Hotel Room	3.86	3.53	3.63	3.97	3.76
S.D. County Hotel Room Nights	1,360,000	1,111,000	1,065,000	927,000	956,000
Assoc./Exhibitor Co. Spending: Per SDCC Attendee	\$244 Mil. \$385	\$202 Mil. \$389	\$190 Mil. \$411	\$178 Mil. \$421	\$208 Mil. \$423
Spending in San Diego per: SDCC Primary Event Attendee SDCC Primary Event Visitor	\$1,403 \$1,287	\$1,390 \$1,332	\$1,397 \$1,293	\$1,414 \$1,312	\$1,431 \$1,335
Total Direct Spending in San Diego County by SDCC Visitors	\$889 Mil.	\$722 Mil.	\$646 Mil.	\$597 Mil.	\$704 Mil.
Lodging Spending in S.D. County ADR (including taxes) ADR (net taxes/assessments)	\$336 Mil. \$247 \$220	\$249 Mil. \$224 \$198	\$213 Mil. \$212 \$189	\$202 Mil. \$217 \$193	\$255 Mil. \$267 \$237
Lodging Taxes: Transient Lodging Taxes TMD Assessment Total Revenue	\$31.4 Mil. \$5.4 Mil. \$36.8 Mil.	\$23.4 Mil. \$5.3 Mil. \$28.8 Mil.	\$19.9 Mil. \$3.6 Mil. \$23.5 Mil.	\$18.8 Mil. \$3.6 Mil. \$22.2 Mil.	\$23.8 Mil. \$4.5 Mil. \$28.4 Mil.

\*All estimates appearing in the table have been rounded and may not sum to totals.

## **Study Definitions for the SDCC Visitor Profile and Economic Analysis**

A primary event includes regional, national, and international conventions, conventions with trade shows, trade shows, and corporate meetings. SDCC primary events do not include consumer shows or local/district business or social events. SDCC primary event visitors are not residents of San Diego County. SDCC primary event visitors includes registered attendees of SDCC primary events and non-registered members of their immediate travel party. The immediate travel party may include multiple people registered for the event, as well as friends or relatives who are just visiting San Diego and are not registered for the event.



## SAN DIEGO TOURISM OVERVIEW

In the tables below CIC Research has listed the passenger and attendance counts for selected San Diego sectors as indicators of the vitality of tourism in San Diego. The volume of air arrivals and cruise passengers to San Diego, as well as the number of attendees at major area theme parks and at the Convention Center are listed in Table 2 and illustrate trends of visitation from business and leisure travelers to the area.

Table 2  
**Theme Park Attendance, Air Passenger Arrivals,  
 SDCC Primary Event Attendance, and Cruise Passengers  
 (2008-2015)**

	2008	2009	2011	2013	2015
Theme Park Attendance	11,256,000	10,960,000	11,520,000	12,220,000	11,659,000
Air Passenger Arrivals	9,064,000	8,501,000	8,450,000	8,850,000	10,028,000
SDCC Primary Event Attendance	634,000	519,000	567,000	524,000	553,000
Cruise Ship Passengers	514,000	437,000	168,000	127,000	121,000

Sources: San Diego Tourism Authority; San Diego International Airport; San Diego Convention Center Corporation; San Diego Unified Port District.

- Air passenger arrivals, theme park attendance, convention center attendance, and cruise passengers all reported peak volumes in the 2007 to 2008 period. In 2009 the attendance and passenger volumes declined significantly with the national economic recession. Significant recovery has occurred since, with the notable exception of cruise passenger volume.

Table 3  
**San Diego County Lodging Inventory and Industry Performance  
 (2008-2015)**

	2008	2009	2011	2013	2015
Inventory of Rooms (yearend) <sup>1</sup>	57,000	57,700	58,100	58,800	60,700
Room Nights Available (annual) <sup>2</sup>	20,200,000	20,900,000	21,100,000	21,400,000	22,060,000
Occupancy Rate <sup>2</sup>	69.5%	63.3%	68.9%	71.6%	76.4%
Room Nights Sold <sup>2</sup>	14,000,000	13,200,000	14,600,000	15,380,000	16,840,000
Average Daily Rate <sup>2</sup> (ADR)	\$142	\$124	\$126	\$136	\$151
Hotel Visitors (est.) <sup>2</sup>	7,708,000	7,323,000	8,226,000	8,917,000	9,591,000

Sources: 1) SDTA, San Diego County Lodging Inventory, CIC Research, Inc.  
 2) Smith Travel Research, Inc., "STR Lodging Review," 2008-2015.

There were 34.3 million visitors to San Diego County in 2015. Prior to the last recession the visitor volume in San Diego County peaked at 32.2 million visitors in 2006. Visitor volume then declined to 29.6 million in 2009 and has recorded growth in each year since 2010. About half of all San Diego visitors (17.1 million) were day visitors in 2015 and there were about 17.2 million overnight visitors.

From the recession low of 7.3 million in 2009, the volume of hotel visitors increased about 31% to 9.6 million in 2015. Overnight in-home guests to San Diego recorded a small increase of about 5% from just under 6.4 million in 2009 to almost 6.7 million in 2015. The category of “Other Overnight Visitors” (e.g., camping, RVs, timeshares, and rental housing) increased about 29%, from 731,000 in 2009 to 940,000 in 2015. Day visitors to San Diego increased more than 12%, from 15.2 million visitors in 2009 to 17.1 million visitors in 2015.

The total spending per overnight visitor in San Diego was \$520 in 2015. Overnight visitors with hotel accommodations reported an average total spending per visitor of about \$701 in 2015.

Table 4  
**San Diego County Visitors and Visitor Spending\***  
**(2008-2015)**

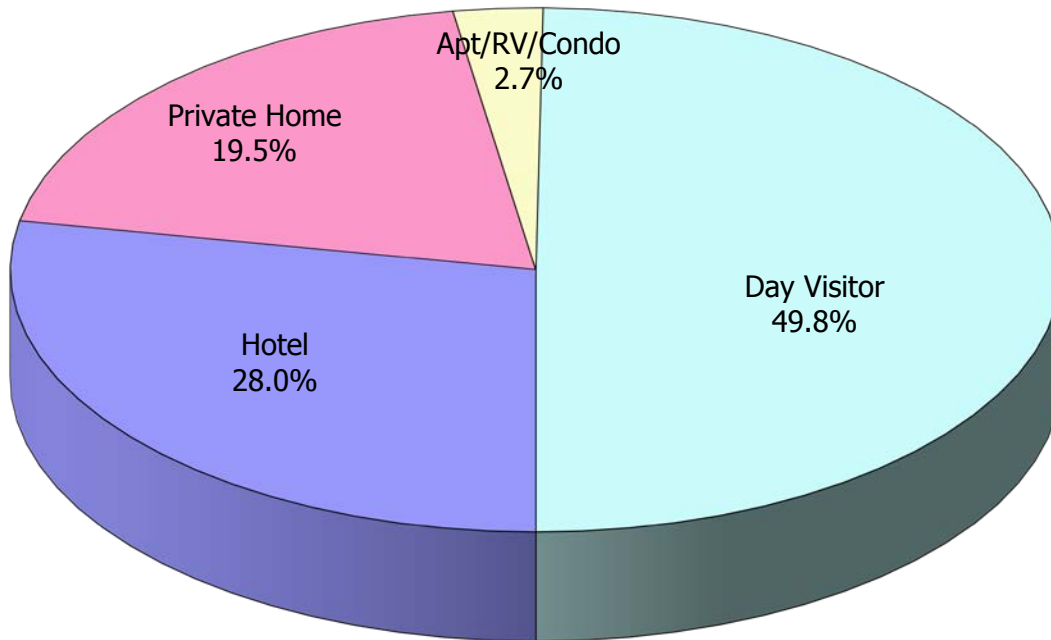
	<b>2008</b>	<b>2009</b>	<b>2011</b>	<b>2013</b>	<b>2015</b>
Total Visitors	31.1 Mil.	29.6 Mil.	31.1 Mil.	33.1 Mil.	34.3 Mil.
Overnight Visitors	15.2 Mil.	14.4 Mil.	15.8 Mil.	16.4 Mil.	17.2 Mil.
Hotel Visitors	7.7 Mil.	7.3 Mil.	8.2 Mil.	8.9 Mil.	9.6 Mil.
Day Visitors	15.9 Mil.	15.2 Mil.	15.4 Mil.	16.7 Mil.	17.1 Mil.
Day Visitors (excl. Mex.)	12.1 Mil.	11.5 Mil.	11.7 Mil.	12.6 Mil.	12.7 Mil.
Mexican Day Visitors	3.9 Mil.	3.6 Mil.	3.7 Mil.	4.1 Mil.	4.4 Mil.
Total Visitor Spending	\$7.9 Bil.	\$7.0 Bil.	\$7.5 Bil.	\$8.4 Bil.	\$9.9 Bil.
Overnight Visitor Spending	\$7.0 Bil.	\$6.3 Bil.	\$6.7 Bil.	\$7.5 Bil.	\$9.0 Bil.
Hotel Visitors	\$4.4 Bil.	\$4.5 Bil.	\$4.8 Bil.	\$5.5 Bil.	\$6.7 Bil.
Day Visitor Spending	\$0.87 Bil.	\$0.75 Bil.	\$0.80 Bil.	\$0.91 Bil.	\$0.97 Bil.
Day Visitors (excl. Mex.)	\$0.63 Bil.	\$0.56 Bil.	\$0.60 Bil.	\$0.68 Bil.	\$0.71 Bil.
Mexican Day Visitors	\$0.23 Bil.	\$0.19 Bil.	\$0.20 Bil.	\$0.24 Bil.	\$0.26 Bil.

\*May not sum to totals due to rounding.



## San Diego County Visitors by Type of Accommodations

Figure 1  
**San Diego Visitors by Type of Accommodations\***  
(2015 = 34.3 million total visitors)



\* May not sum to 100% due to rounding.

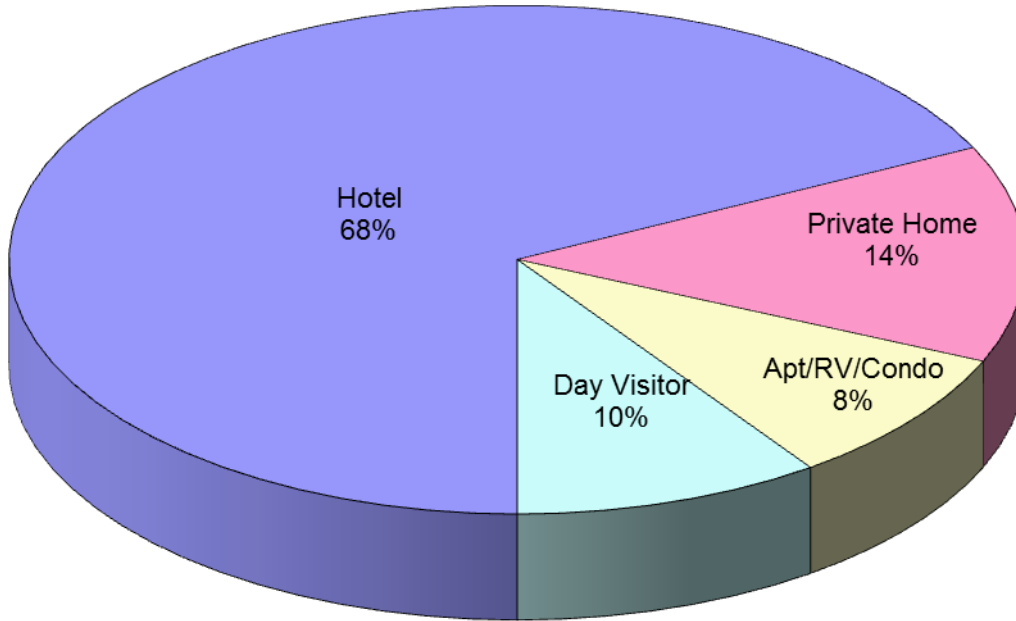
## San Diego Visitor Spending in 2015 by Type of Accommodations<sup>3</sup>

- Total visitor spending was \$9.9 billion in San Diego during 2015.
- Spending by hotels guests was \$6.7 billion, about 68% of total visitor spending.
- Private home guests spent almost \$1.4 billion, about 14% of total visitor spending.
- Day visitors spent almost \$1.0 billion, 10% of total spending.
- Campers/RV/Other overnight visitors spent almost \$0.9 billion, 9% of total spending.
- SDCC visitors to San Diego spent about \$704 million during 2015, 7% of the \$9.9 billion total spending by all visitors to San Diego.

<sup>3</sup> Including air transportation spending impacts in San Diego of the non-resident visitor's air trip and direct spending in San Diego generated by association/exhibitor companies for events held throughout the county.

Figure 2

**San Diego County Total Visitor Spending by Type of Accommodations  
(2015)**



- Visitors who stay in hotels represent about 28% of all visitors to the County, but they generate more than two-thirds of spending by all visitors in San Diego County (i.e., \$6.7 billion of the \$9.9 billion total visitor spending).
- In contrast, day visitors represent about half of all visitors to the County, but they generate only about 10% of all visitor spending in the County (i.e., about \$1.0 billion of the \$9.9 billion total visitor spending).
- Total visitor spending in San Diego decreased from a peak of \$7.9 billion in 2008 to \$7.0 billion in 2009. It has since risen to \$9.9 billion in 2015.
- Although the overall visitor spending in San Diego decreased in 2009, a substantial industry decline began in the fourth quarter of the prior year. This rapid decline carried through 2009. A modest recovery began in 2010 and has gained momentum in 2013, 2014, and 2015.
- All visitor segments have increased in volume and spending since the bottom of the travel industry recession in 2009.

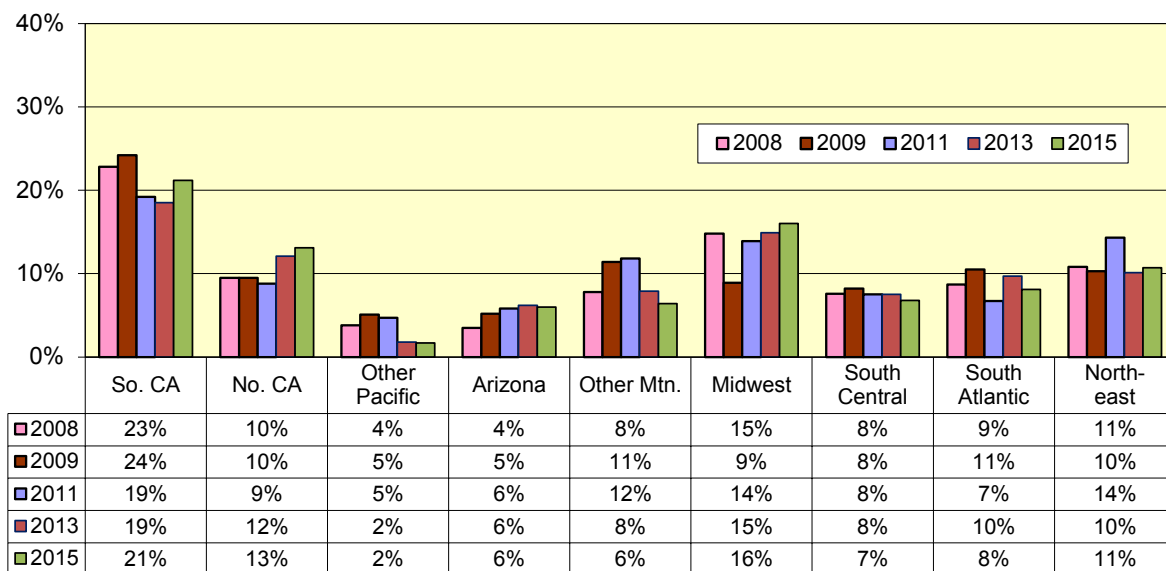


## GEOGRAPHIC ORIGIN OF SDCC VISITORS

### Residence of SDCC Visitors

Of the 553,000 total registered SDCC primary event attendees, there were approximately 492,000 registered SDCC primary event attendees who were visitors to San Diego County during 2015. These visiting attendees also brought friends and family as part of their travel party. As a result there were 527,000 total visitors to San Diego County generated by these events held at the SDCC in 2015.

Figure 3  
**U.S. Region of Residence for SDCC Primary Event Visitors**



- During the period of 2008 through 2015, most SDCC visitors came from Southern California (19%-24%), followed by the Midwest (9%-16%), the Northeastern states (10%-14%) and Northern California (9%-13%).
- The proportion of visitors from Southern California trended downward during the recession from from 26% in 2007 to 19% in 2011.
- In general the percentage of SDCC visitors from Northern California, Arizona, and the Midwest have increased since 2008.

Table 5  
**Residence Ranking by State for SDCC Visitors**  
**(States generating 1% or more visitors)**

State	2008	2009	2011	2013	2015
California	32%	34%	28%	31%	34%
Arizona	4%	5%	6%	6%	6%
Texas	4%	4%	4%	3%	4%
Wisconsin	2%	1%	2%	2%	4%
Nevada	3%	4%	4%	2%	3%
New York	3%	2%	4%	3%	3%
Pennsylvania	1%	3%	4%	2%	3%
Minnesota	2%	2%	2%	2%	3%
Ohio	2%	0%	1%	2%	2%
Illinois	3%	2%	4%	4%	2%
Michigan	2%	1%	1%	1%	2%
Virginia	1%	3%	0%	1%	2%
Florida	3%	2%	1%	3%	2%
Colorado	3%	3%	3%	3%	2%
Massachusetts	1%	1%	1%	2%	2%
New Jersey	4%	3%	3%	2%	2%
Utah	1%	2%	3%	1%	1%
Georgia	1%	1%	1%	1%	1%
Nebraska	0%	0%	0%	0%	1%
Washington	2%	2%	3%	1%	1%
N. Carolina	2%	2%	2%	1%	1%
Maryland	1%	2%	1%	1%	1%

- Visitors from California accounted for 34% of SDCC visitors in 2015. The proportion of SDCC primary event visitors from California declined during the period of 2006 to 2011, but has since increased in 2013 and 2015.
- Southern California was consistently the largest source market, but it should be noted that Northern California generated more visitors than any other state (outside of California).
- Arizona was the second largest origin state for SDCC visitors with 6% in 2015.
- SDCC visitors from Texas, Wisconsin, Nevada, New York, Pennsylvania, and Minnesota represent important source markets with about 3 or 4% of the market each.

Table 6  
**Residence Ranking by Metro Area for SDCC Primary Event Visitors**

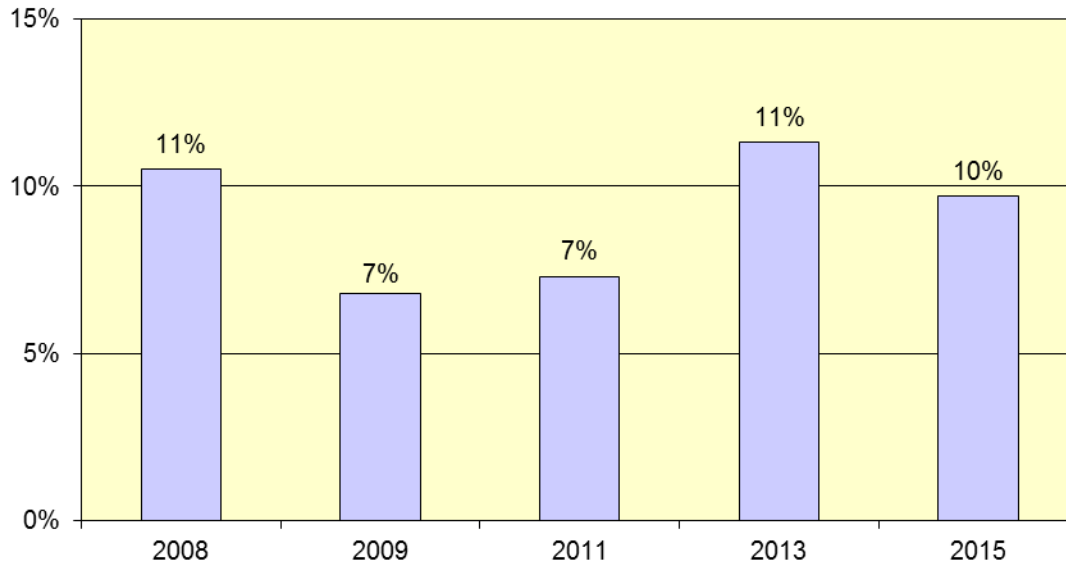
<b>Metro-Area*</b>	<b>2008</b>	<b>2009</b>	<b>2011</b>	<b>2013</b>	<b>2015</b>
Los Angeles-Long Beach (L.A. County)	11%	10%	8%	9%	11%
San Francisco-Oakland-San Jose	6%	6%	6%	9%	8%
Anaheim-Irvine-Santa Ana (Orange Co.)	4%	4%	4%	4%	5%
Phoenix-Mesa	2%	3%	4%	4%	4%
New York-N. New Jersey-Long Island	6%	4%	5%	3%	4%
Washington-Baltimore	2%	3%	2%	3%	3%
Las Vegas- Henderson	2%	2%	4%	1%	2%
Minneapolis - St. Paul	2%	1%	2%	2%	2%
Chicago-Gary-Kenosha	3%	1%	3%	3%	2%
Riverside-San Bernardino	5%	5%	4%	3%	2%
Sacramento-Yolo	2%	3%	1%	1%	2%
Dallas-Fort Worth	2%	2%	2%	2%	2%
Ventura	N/A	2%	1%	0%	2%
Boston-Worcester-Lawrence	0%	1%	2%	2%	2%

\*Metropolitan Statistical Areas are defined by the U.S. Census Bureau.

- SDCC visitors from Los Angeles/Long Beach, San Francisco/Oakland/San Jose, Riverside/San Bernardino, and Orange County areas combined accounted for 26% of the SDCC primary event visitors during 2015.
- Visitors from major metro areas in the Midwestern U.S and the East Coast attending conventions in San Diego during 2015 represented a significant share of the total SDCC primary event visitors. New York City (metro area) and Phoenix-Mesa generated 4% of the SDCC primary event visitors. Washington-Baltimore (metro area) generated 3% of the SDCC primary event visitors. Many of the remaining major U.S. metro areas each generated about 2% of the SDCC primary event visitors.

## SDCC International Visitors

Figure 4  
SDCC Primary Event International Visitors to San Diego  
(2008-2015)



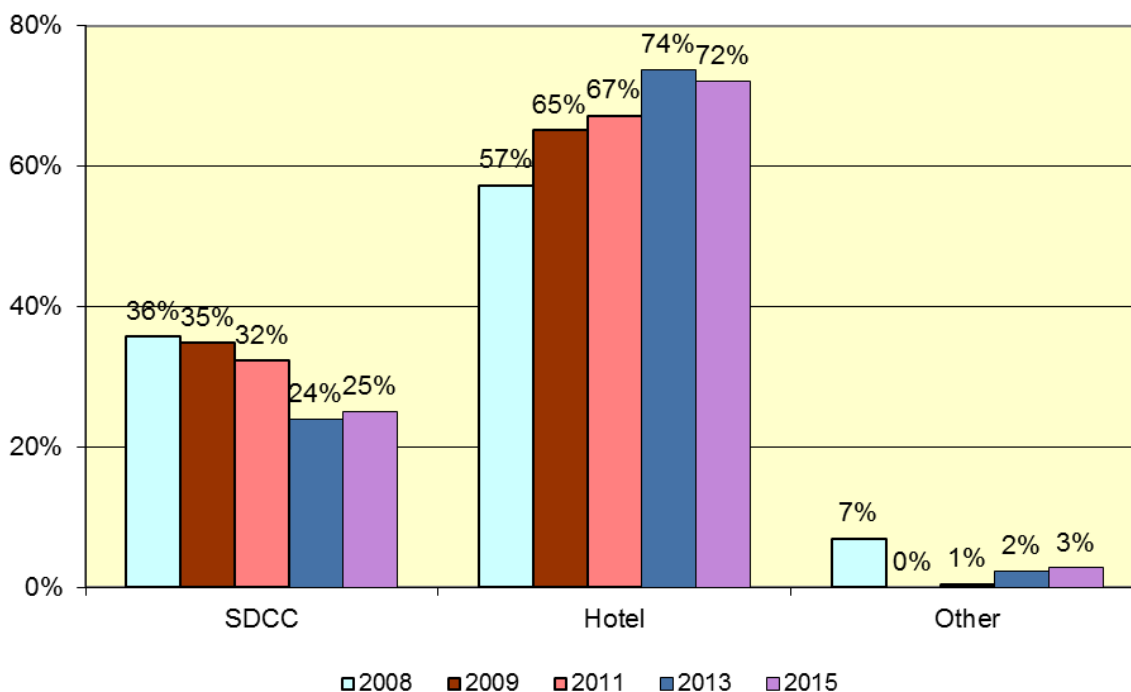
- Prior to the last recession the percentage of SDCC primary event visitors from outside the U.S. was about 11% (2008). The proportion of international visitors for SDCC primary events declined to 7% in 2009 and in 2011. Since 2011 the percentage of international visitors has recovered to more normal historical levels of about 10% to 11% of primary event visitors.
- Canada, Mexico, and the U.K. were the top international countries of origin reported by the visitors who were surveyed for events at the SDCC.



## SDCC PRIMARY EVENTS AND ATTENDANCE CHARACTERISTICS

### Location of Meetings and Events

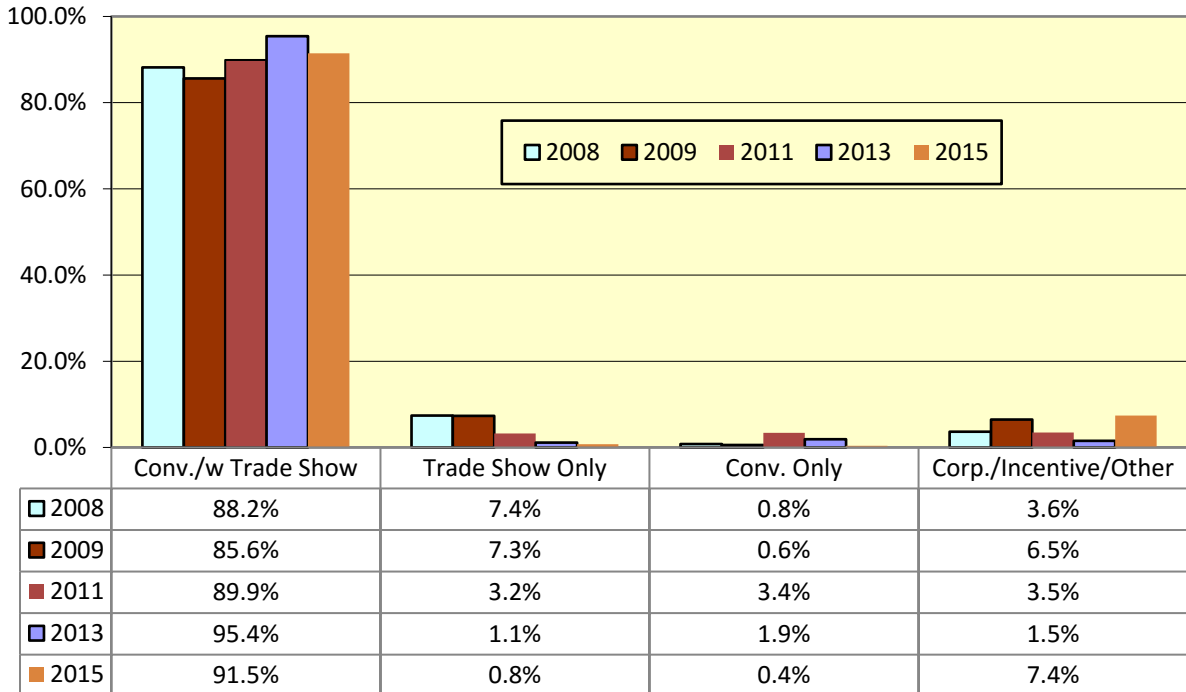
Figure 5  
Location of San Diego County Group Meetings and Events  
(attendance percentage by location)



- In 2015, SDCC primary event attendance represented about 25% of all attendance for conventions, conferences, and trade shows within San Diego County.
- Single-property events held at hotels accounted for almost three-fourths of conventions, conferences, and tradeshow attendance within San Diego County in 2015, up from about two-thirds during the period of 2008 through 2011.
- The SDCC proportion of countywide meetings and event attendance has declined significantly from the peak of 36% in 2008 to about 25% in 2015.
- Countywide the volume of group room nights recorded significant growth in the period of 2010 through 2015 (SDTA room night segmentation surveys). Room nights and primary event attendance at the SDCC have recorded some recovery during this period, but have not rebounded to the prior peak experienced in 2008.

## SDCC Primary Event Attendance by Event Type

Figure 6  
Proportion of Total Primary Event Attendance by Event Type  
(2008-2015)

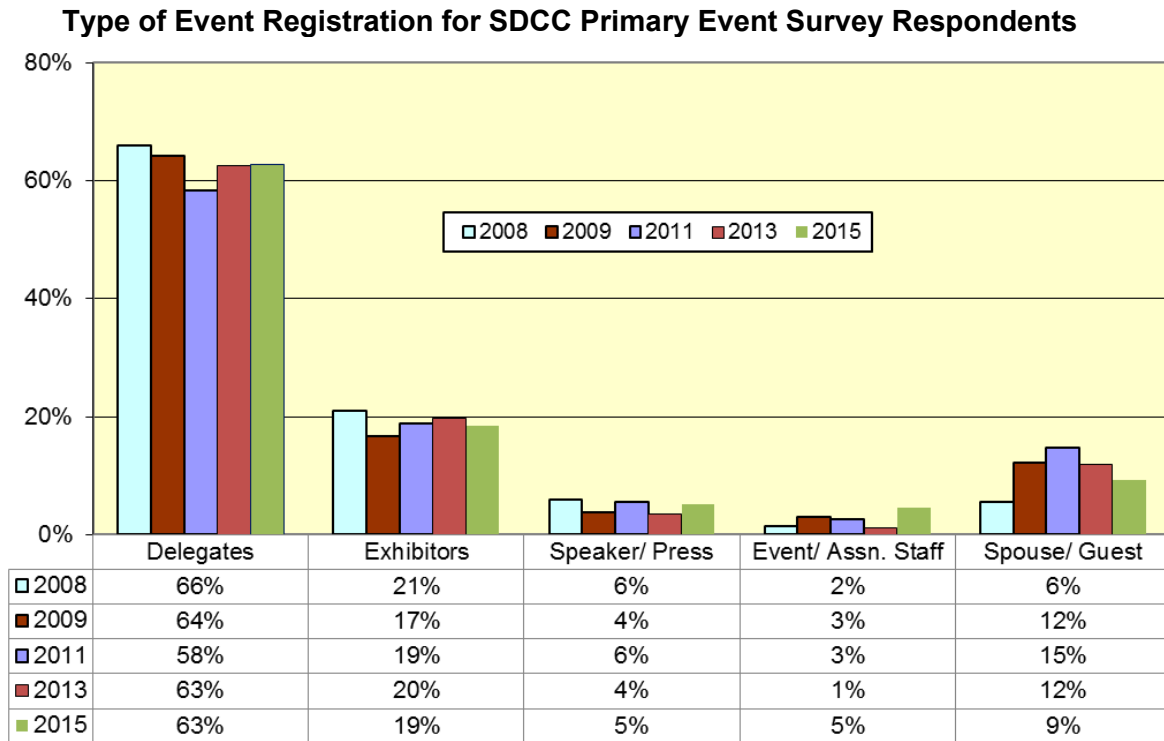


- Attendance for conventions with trade shows represented a large proportion (more than 90%) of the primary event attendance at the SDCC during 2015.
- Trade shows generated only 1% of the SDCC total primary event attendance in 2015, which was lower than the 7% of attendance generated by trade shows in prior years.
- Convention and conference events without exhibition space represented about 2% of SDCC primary event attendance in 2013.
- Corporate and incentive events generated about 7% of SDCC primary event attendance in 2015.



## Event Registration for SDCC Visitors (Badge Classification)

Figure 7

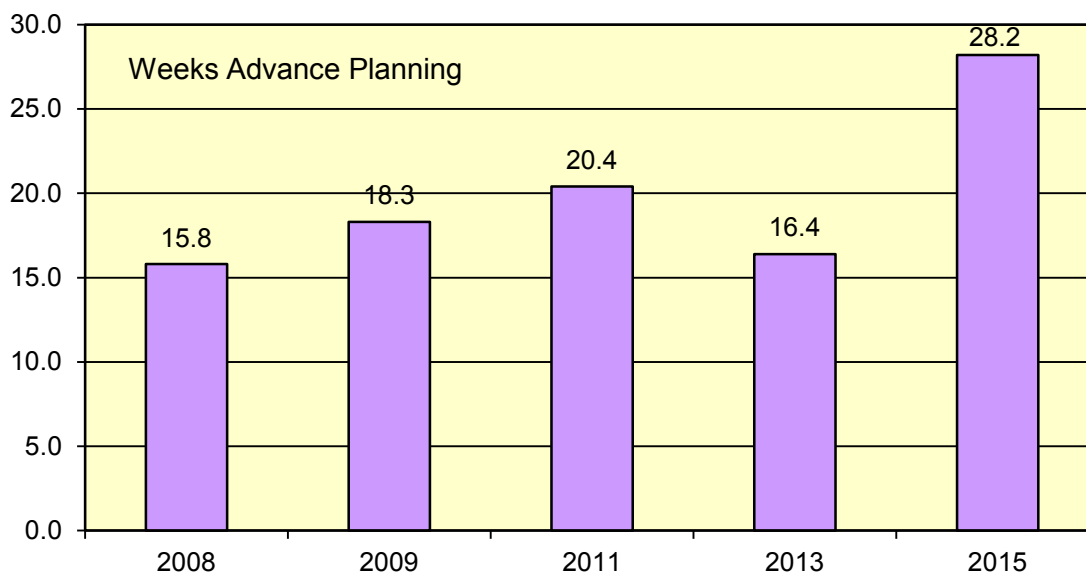


- For the period of 2008 through 2015, the majority of the registered SDCC primary event attendees were delegates. About 63% of the surveyed SDCC primary event attendees were registered as a delegate in 2015 (excludes registered event guests or spouses).
- During the same period (2008 to 2015) about one-fifth of the surveyed SDCC primary event attendees were registered with the event as exhibitors.
- The proportion of registered guests/spouse SDCC primary event attendees varied significantly during the five year period from a low of 6% in 2008 to a high of 15% in 2011. It was 9% in 2015.
- Each year about 4%-6% of the survey respondents reported that they were registered with the event as a speaker or a member of the press/media.
- About 5% of the SDCC survey respondents in 2015 were event or association staff.



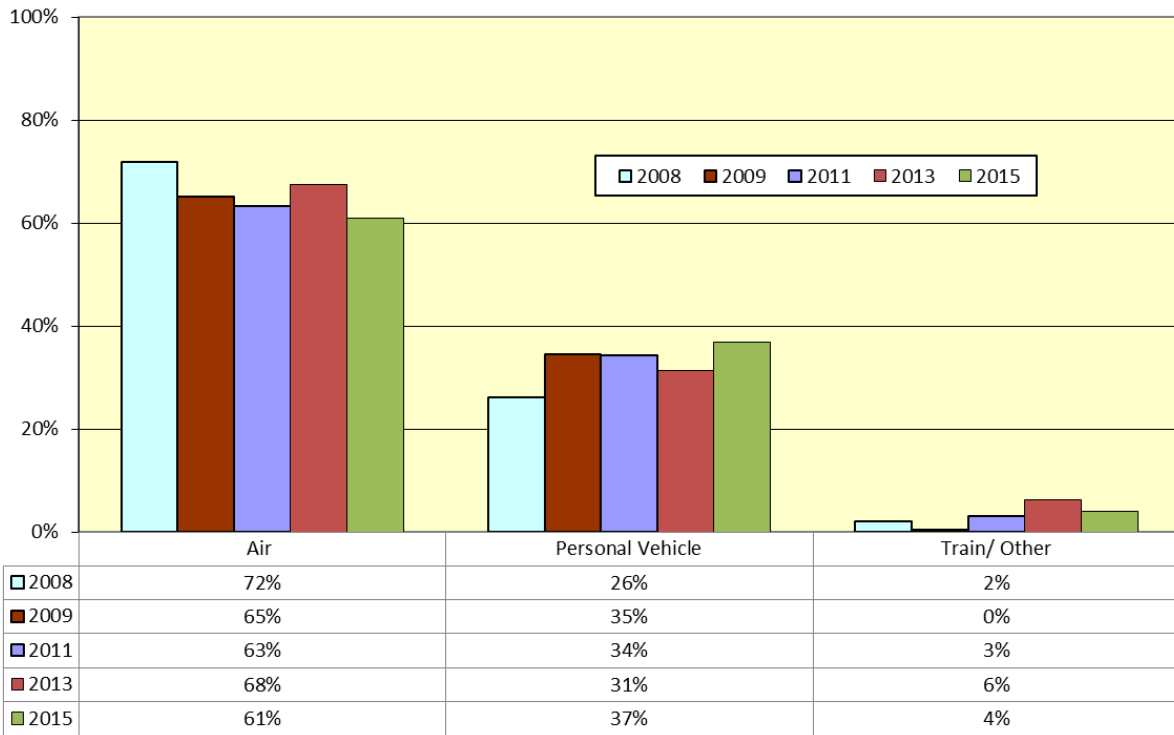
## TRIP CHARACTERISTICS FOR SDCC VISITORS

Figure 8  
**Advance Trip Planning Time**  
**For SDCC Primary Event Visitors**  
(weeks prior to event)



- Visitors to San Diego for SDCC primary events have reported relatively long trip planning time frames.
- The length of the trip planning increased to a new high of 28 weeks in 2015.
- Visitors attending single-property events (i.e., Non-SDCC events) reported a shorter trip planning time of 17 weeks in 2015 compared to the 28 weeks reported by SDCC primary event attendees.
- All overnight visitors to San Diego reported a relatively short planning time of nine weeks.
- Overnight leisure travelers to San Diego reported an advanced trip planning periods of about nine weeks.

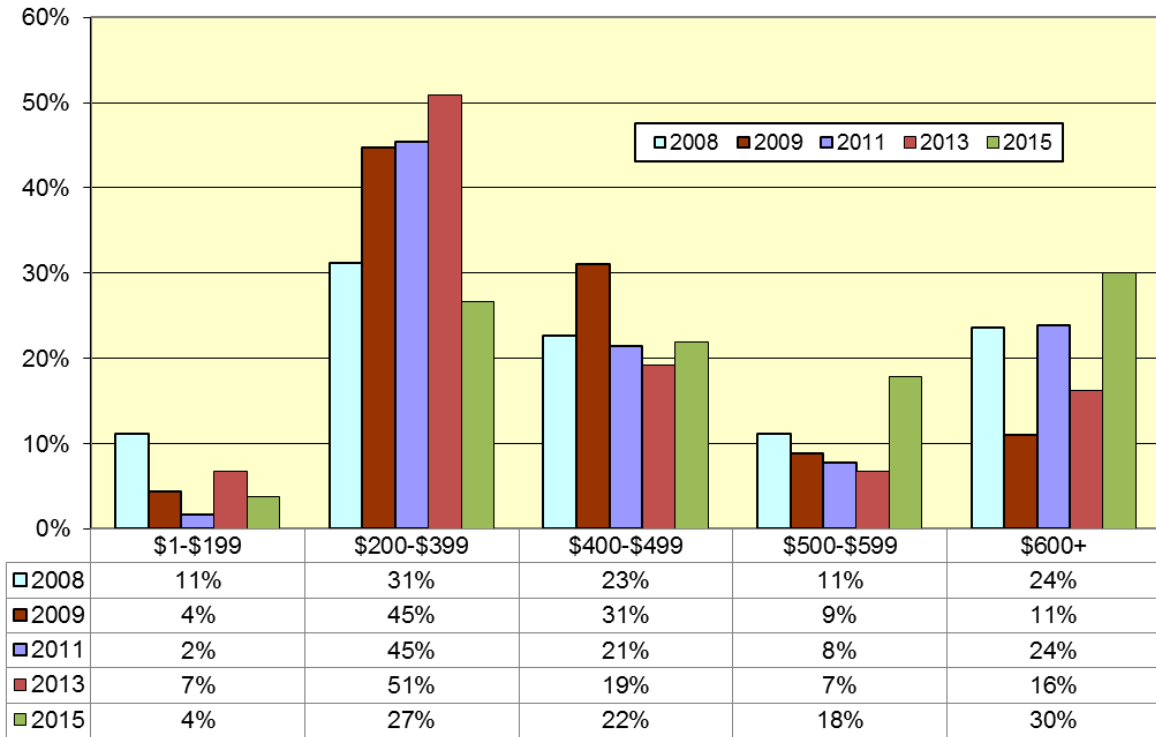
**Figure 9**  
**Mode of Transportation to San Diego**  
**For SDCC Visitors\***



\*Multiple responses.

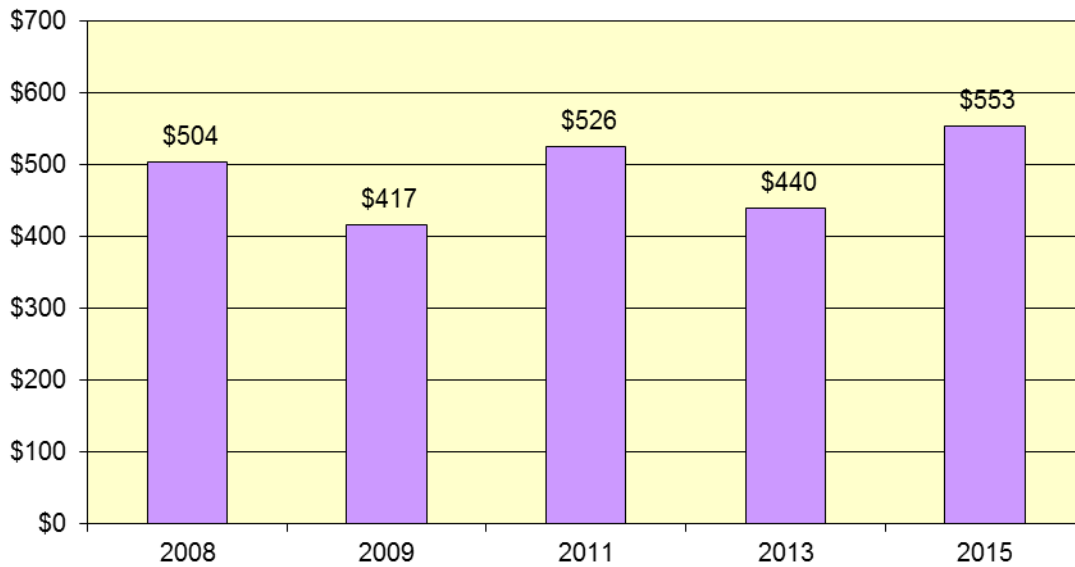
- In 2015, 61% of SDCC visitors flew to San Diego, which was down seven percentage points from 2013. SDCC visitors traveling by air to San Diego peaked at 72% in 2008.
- In contrast, the proportion of SDCC visitors who travelled to San Diego by personal vehicle was up from 31% in 2013 to 37% in 2015.
- A small percentage (about 4%) of SDCC primary event attendees reported coming by train, rental car, or other transportation.

Figure 10  
**Cost of Airline Ticket for SDCC Visitors**  
 (air travelers only)



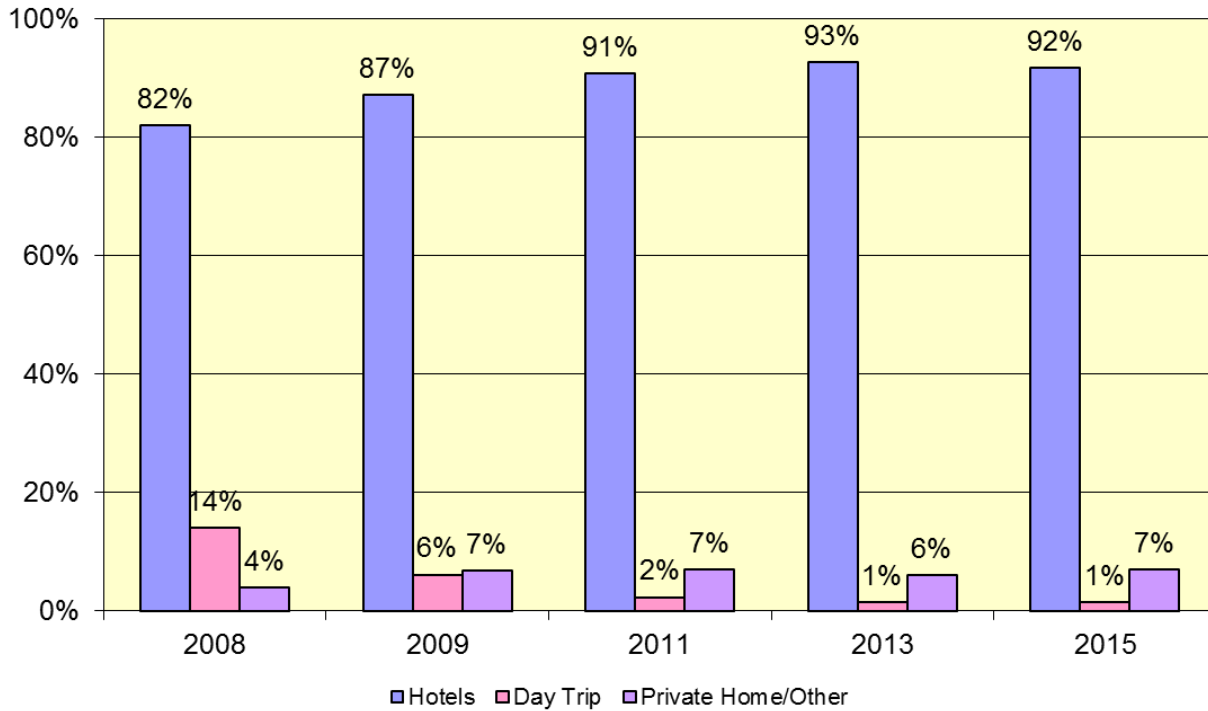
- Of the 321,000 SDCC primary event visitors who arrived in San Diego by air in 2015, about 27% paid \$200-\$399 for their air ticket.
- SDCC primary event visitors reporting a roundtrip airfare of less than \$200 dropped from 7% in 2013 to 4% in 2015.
- In 2015, the proportion of airfares of \$600 or more increased 14 percentage points, to 30%.

Figure 11  
**Mean Roundtrip Airfares to San Diego  
Reported by SDCC Visitors Who Traveled by Air**



- In 2015 the average price of a roundtrip airline ticket to San Diego was \$553, as reported by SDCC primary event visitors who arrived by air.
- In contrast, the average airfare for Non-SDCC meetings and event visitors was \$696 and the average airfare reported by all San Diego visitors was \$564 in 2015.
- The average roundtrip airfare reported by SDCC primary event visitors increased 26% from 2013 to 2015.

Figure 12  
**Type of Accommodations in San Diego for SDCC Visitors\***



\*Accommodations percentages were adjusted for local resident attendance at events.

- In 2015, about 92% of SDCC visitors reported staying in hotels, about 7% reported staying in private homes of friends or relatives, and 1% were day visitors to San Diego without overnight accommodations.
- The proportion of SDCC primary event visitors with hotel accommodations rose over the period of 2008 through 2013 and then remained nearly as high in 2015. The proportion of private home use has varied from 4% to 7%. The proportion of day visitors at the SDCC primary events has dropped substantially.

Table 7  
**Location of Hotel Accommodations for SDCC Primary Event Visitors**

<b>Selected Areas of San Diego County</b>	<b>2008</b>	<b>2009</b>	<b>2011</b>	<b>2013</b>	<b>2015</b>
Downtown/Gaslamp/Embarcadero	71%	70%	74%	75%	83%
Hotel Circle/Mission Valley	8%	5%	8%	5%	5%
San Diego Bay Areas/Harbor/Shelter Is.	3%	5%	3%	3%	3%
Old Town	2%	0%	1%	1%	2%
Point Loma	1%	0%	1%	2%	1%
Mission Bay/Mission Beach/Point Loma	5%	4%	4%	3%	1%
Coronado	2%	1%	0%	2%	0%
La Jolla	1%	2%	1%	2%	0%
Pacific Beach	1%	1%	2%	1%	0%
Rest of San Diego	11%	15%	9%	12%	5%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

- About 83% of SDCC visitors that stayed in a hotel reported that their accommodations were located near the Convention Center in the Downtown/Gaslamp/Embarcadero area.
- Mission Valley, approximately 15 minutes from the Convention Center, was an important secondary location for overnight accommodations among the SDCC visitors, at 5%.

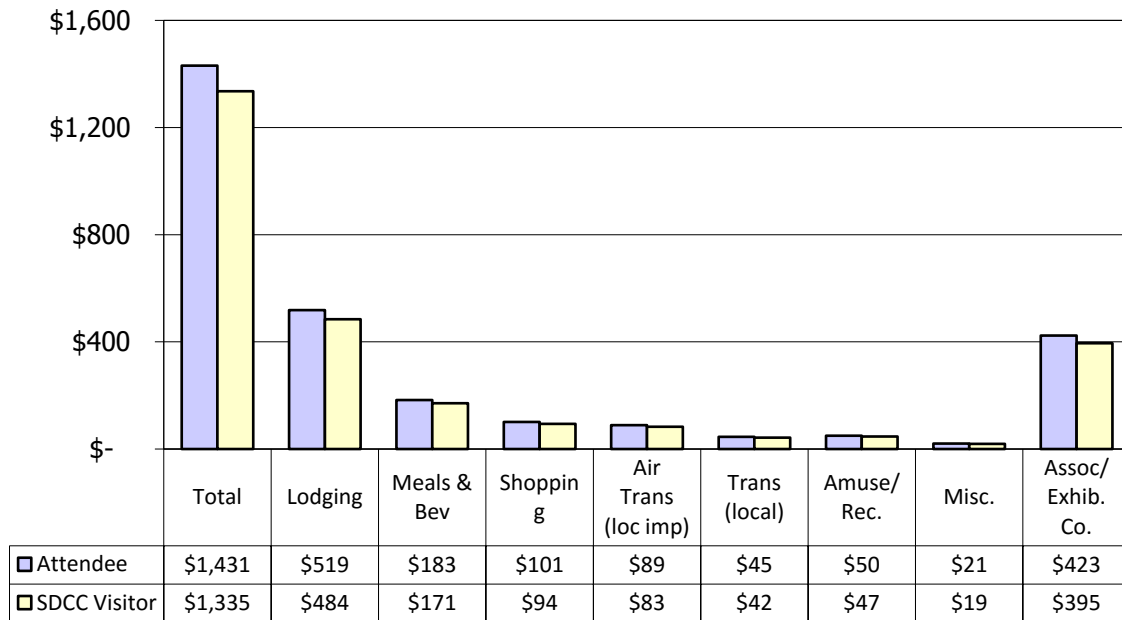
Table 8  
**Reported Hotel/Motel Accommodations by Brand  
 For SDCC Primary Event Visitors**

<b>Hotel Brand/ Independent</b>	<b>2008</b>	<b>2009</b>	<b>2011</b>	<b>2013</b>	<b>2015</b>
Marriott Hotel	16%	14%	20%	21%	28%
Hilton Hotel	7%	16%	15%	17%	20%
Omni Hotel	3%	5%	8%	10%	10%
Hyatt Hotel	11%	15%	16%	9%	10%
Embassy Suites	5%	8%	4%	5%	5%
Hard Rock Hotel	4%	3%	3%	3%	3%
Wyndham Garden	1%	0%	0%	2%	2%
Westin	3%	3%	2%	2%	2%
Sheraton Hotel	3%	3%	1%	1%	2%
Best Western	2%	3%	2%	2%	2%
Half Moon Bay	1%	0%	1%	1%	2%
Town & Country Hotel	1%	1%	0%	1%	2%
Horton Grand	1%	1%	2%	2%	1%

- Most hotels used by SDCC primary event visitors are chain hotels in close proximity to the Convention Center.
- The 487 SDCC primary event visitors who were surveyed in 2015 reported staying in 48 different San Diego lodging properties.



Figure 13  
**Total Spending in San Diego County\***  
**Per SDCC Registered Attendee and Per SDCC Visitor**  
**(2015)**

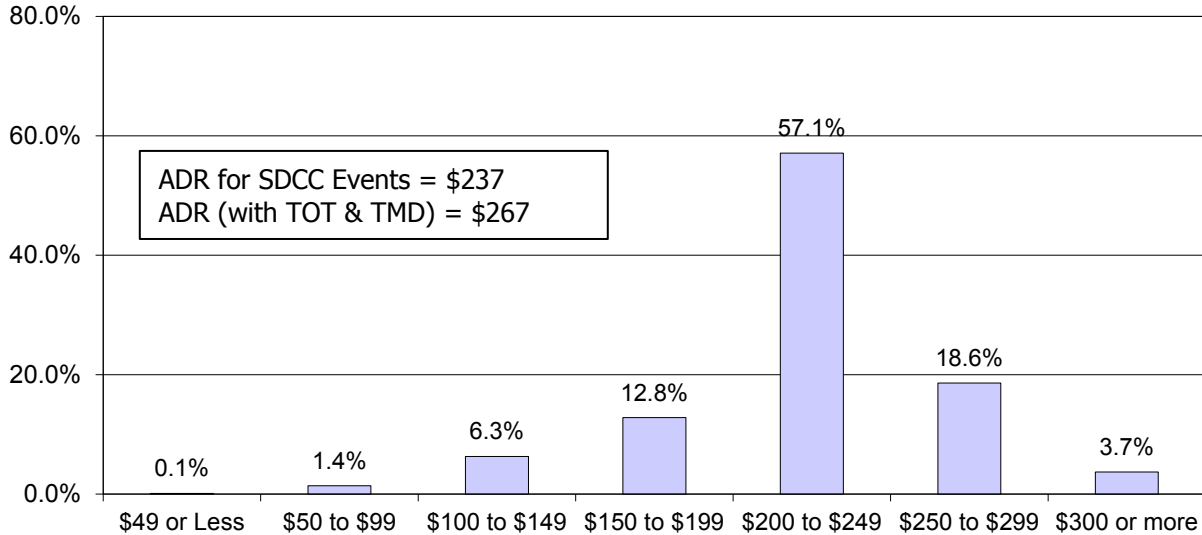


\* Spending per registered event attendee includes all spending for the travel group including non-registered members of the group. Spending in each category includes all applicable taxes and tips.

- There were 492,000 visitors to San Diego County who were registered attendees for SDCC primary events in 2015. Including the total travel group there were 527,000 visitors to San Diego (registered attendees and members of their travel party).
- Average spending in San Diego per SDCC registered event attendee was \$1,431 or about \$1,335 per SDCC visitor including the non-registered members of the travel party.
- The total direct impact of SDCC visitors was about \$704 million within San Diego County, including \$208 million in association/exhibitor company spending and about \$44 million in air travel impact on the local economy (492,000 x \$1,431 = \$704 million).
- About 36% of the SDCC registered event attendee spending impact was reported for lodging (\$519). Another 13% of the spending impact was for meals and beverages (\$183) and about 7% (\$101 was spent on shopping).
- Each SDCC primary event attendee generated a local direct impact of about \$89 for air transportation, \$45 for ground transportation, and \$50 on amusements, recreation, and attractions during their stay in San Diego.
- Combined association and exhibitor company spending averaged about \$423 per registered event attendee (30% of total spending).

Figure 14

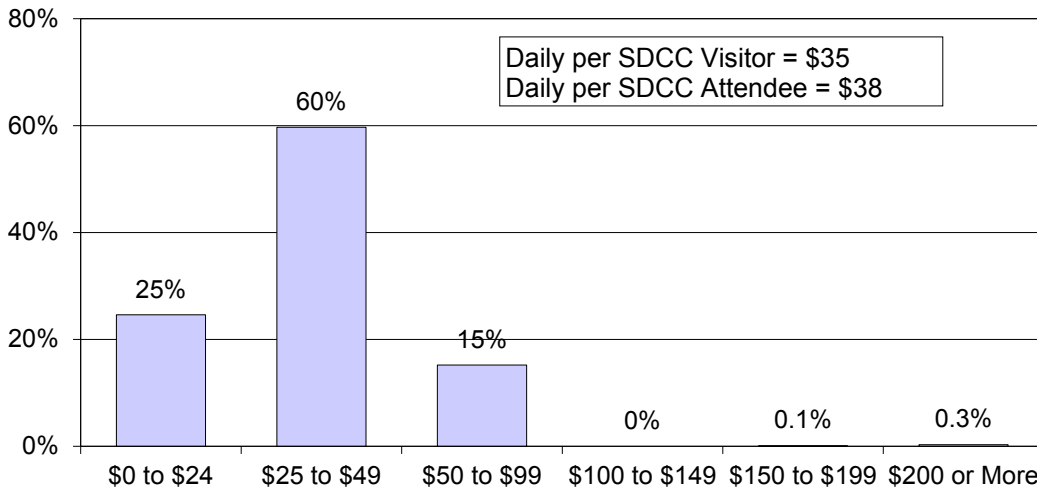
**Average Daily Room Rate (ADR) Reported by  
SDCC Primary Event Visitors with Hotel Lodging  
(2015)**



- Almost 92% of the 527,000 SDCC primary event visitors in 2015 required overnight hotel accommodations for an estimated 483,000 SDCC visitors in San Diego staying in local area hotels.
- These 483,000 SDCC primary event visitors staying in San Diego hotels averaged about 1.90 people per room (1.77 registered event attendees and 0.13 people who were members of the travel party, but were not registered for the event).
- An estimated 255,000 hotel rooms were used with an average stay of 3.76 nights. Estimated total room nights purchased were approximately 956,000 for SDCC primary events during 2015.
- Total lodging spending by SDCC primary event visitors was an estimated \$255 million in 2015, including approximately \$23.8 million in transient occupancy taxes (TOT) and \$4.5 million TMD assessments.
- The average daily room cost for SDCC primary events was \$237 net of taxes or about \$267 including the TOT and TMD assessment. The San Diego countywide average daily room rate (ADR) reported by STR was \$151 for 2015 – about 36% lower than the daily room rate paid by SDCC primary event visitors (net of taxes).<sup>4</sup>

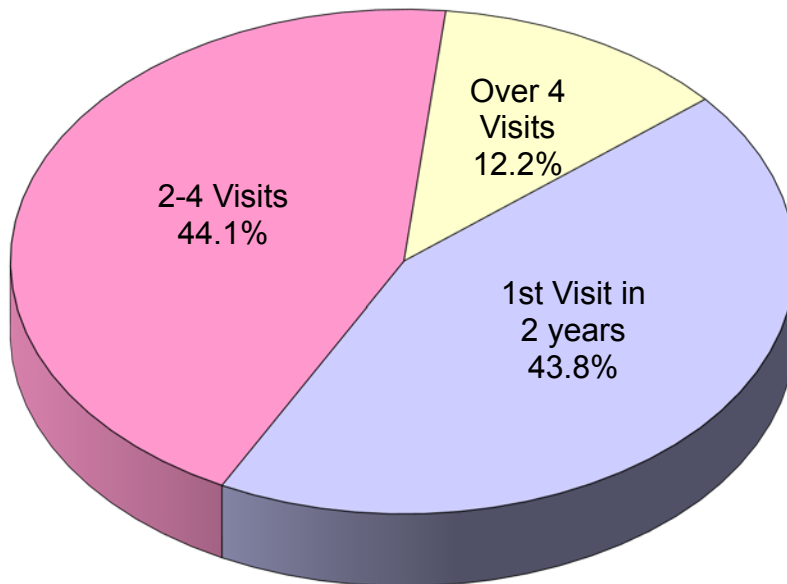
<sup>4</sup> Smith Travel Research, *STR Lodging Review*, December 2015.

**Figure 15**  
**Daily Per Person Spending for Meals and Beverages**  
**By SDCC Primary Event Visitors**



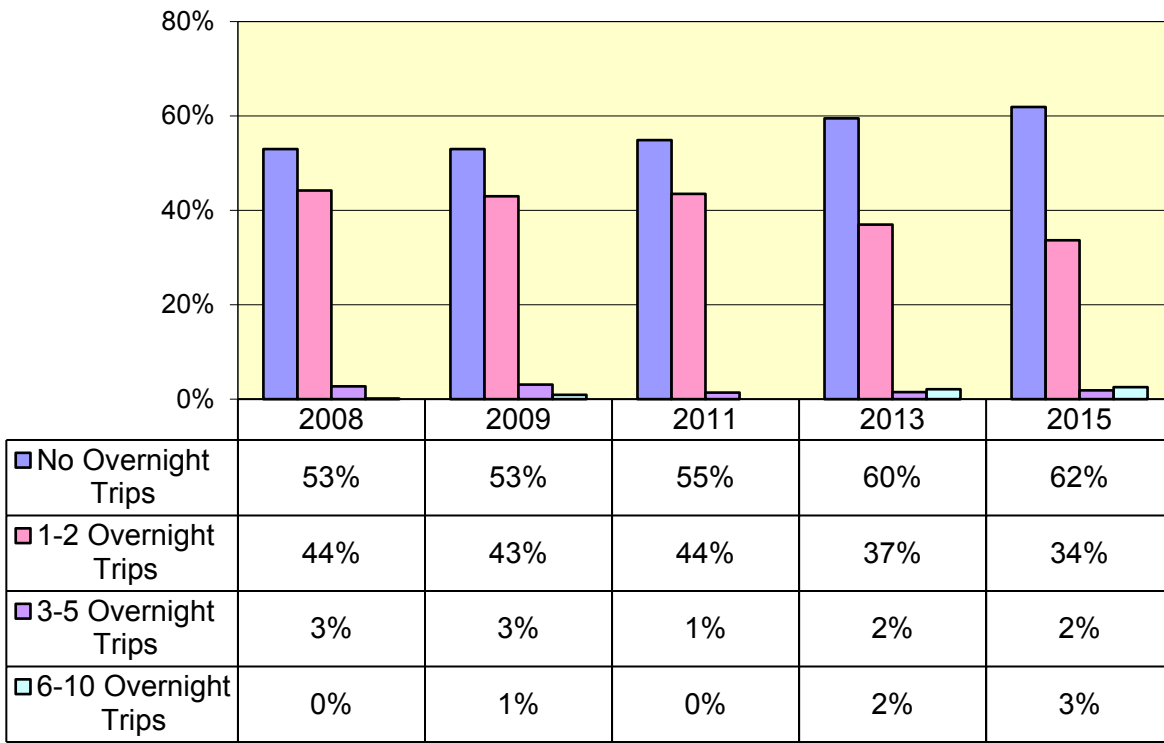
- Average daily spending on meals and beverages was \$35 per SDCC primary event visitor. About sixty percent (60%) of the SDCC primary event visitors spent between \$25 to \$50 per person on meals and beverages each day.

**Figure 16**  
**Number of Visits to San Diego in the Last Two Years by SDCC Visitors**



- About 44% of the SDCC primary event visitors reported it was their first visit to San Diego in the past two years.
- Similarly, about 44% of respondents reported they had visited San Diego two to four times in the last two years. Another 12% reported they had visited San Diego more than four times in the last two years.

**Figure 17**  
**Intended Overnight Leisure Trips to San Diego in the Next Two Years**  
**By SDCC Primary Event Visitors**



\*May not sum to 100% due to rounding.

- A third (34%) of SDCC primary event visitors reported that they intend to return to San Diego for one or two overnight leisure trips in the next two years.
- About 2% of SDCC primary event visitors reported that they intend to take three or more overnight leisure trips to San Diego in the next two years.
- About 3% of SDCC primary event visitors intend to visit San Diego for overnight leisure trips 11 or more times in the next two years.
- In 2015, nearly two-thirds (62%) of the SDCC primary event visitors said they did not intend to make any overnight trips to San Diego in the next two years.

## SELECTED SDCC PRIMARY EVENT VISITOR CHARACTERISTICS

Table 9  
Travel Group Size

San Diego County Event Visitors v. All S.D. Visitors	2008	2009	2011	2013	2015
SDCC Primary Events	1.7	1.6	1.6	2.0	2.1
Non-SDCC Events	1.5	1.5	1.5	2.0	1.9
SDCC Convention & Trade Show	1.7	1.6	1.6	2.0	2.0
SDCC Tradeshow Events	1.9	1.9	1.8	n.a.	n.a.
All San Diego County Events	1.6	1.5	1.6	2.0	1.9
All San Diego Day Visitors	2.9	3.0	2.8	3.0	2.9
All San Diego Overnight Visitors	2.2	2.1	2.1	2.4	2.2

- The travel party size reported by SDCC primary event visitors increased slightly from 2.0 people in 2013 to 2.1 people in 2015. The travel group size for all overnight visitors to San Diego decreased from 2.4 in 2013 to 2.2 in 2015.

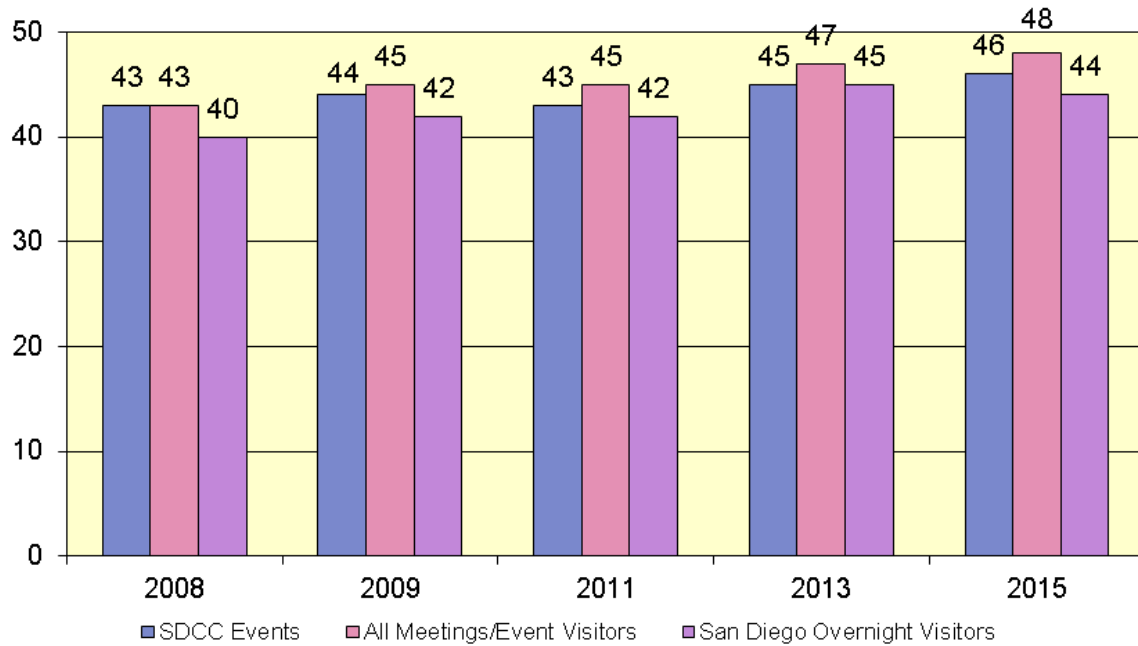
Table 10  
Length of Stay in San Diego County

San Diego County Event Visitors v. All S.D. Visitors	2008	2009	2011	2013	2015
SDCC Primary Events	3.8	3.6	3.8	4.0	3.8
Non-SDCC Events	3.5	4.1	3.6	3.9	3.7
SDCC Convention & Trade Show	3.9	3.7	3.8	4.1	3.9
SDCC Tradeshow Events	2.7	2.7	3.3	n.a.	n.a.
All San Diego County Events	3.6	3.9	3.6	3.9	3.7
San Diego Overnight Visitors	4.0	3.6	3.4	4.0	3.8

- In 2015, the average length of stay for SDCC primary event visitors was 3.8 nights and included hotel, private home and other overnight accommodations. The length of stay for SDCC visitors has varied from 3.6 nights to 4.0 nights since 2008.
- In comparison, the average length of stay for all San Diego overnight visitors was also 3.8 nights in 2015. The average length of stay for San Diego overnight visitors has decreased from 4.0 nights in 2013.

Figure 18

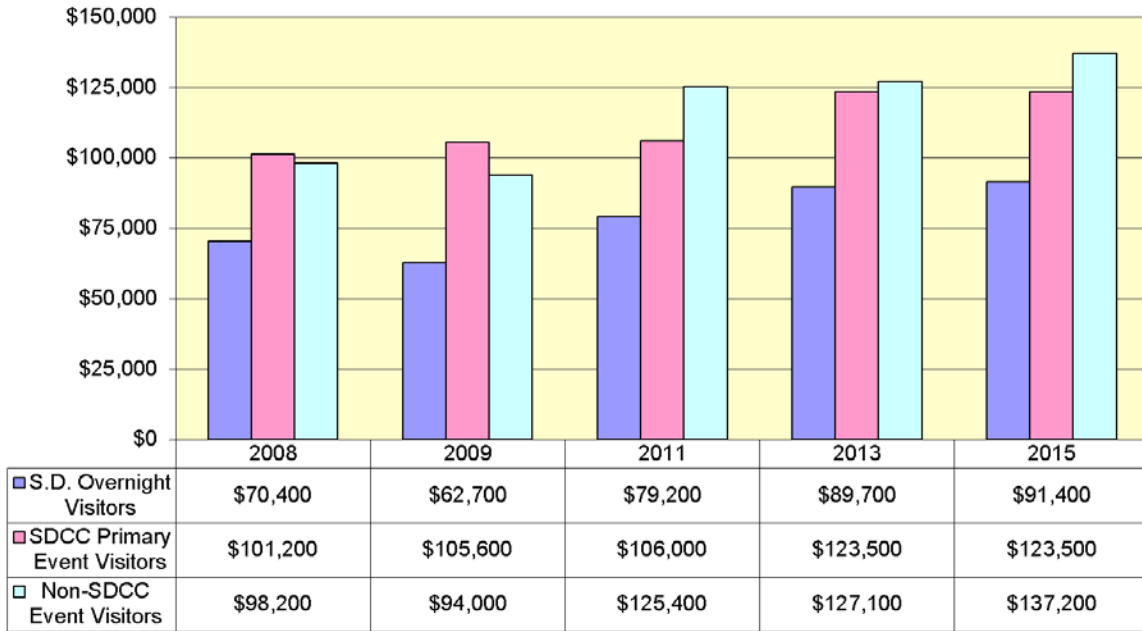
**Median Age of Head of Household  
(2008-2015)**



- SDCC primary event visitors have reported a slowly increasing median age for the head of household, from 43 years in 2008 to 46 years in 2015.
- Visitors who attended single-property events or other non-SDCC events were a little older and have demonstrated a trend of increasing age. The median age for the head of household rose from 43 years in 2008 to a peak of 48 years in 2015.
- The median age of the head of household for San Diego overnight visitors has increased from 40 to 44 years of age during the period of 2008 to 2015.

Figure 19

**Median Annual Household Income  
(2008-2015)**



- In 2015, the median household income reported for SDCC primary event attendees was \$123,500.
- In contrast the median income of all overnight visitors to San Diego was significantly lower at \$91,400 in 2015.
- The median income of SDCC primary event attendees grew from \$101,200 in 2008 to \$123,500 in 2015.
- In general, the median incomes reported in 2015 for all categories of visitors to San Diego were higher or the same as in 2013.



## APPENDIX A

### Events Surveyed at SDCC 2015

- A total of 36 SDCC primary events were represented in the visitor interviews completed by CIC Research during 2015.

1	Comic-Con
2	Isagenix International Celebration
3	Realtors Conference & Expo
4	American Society for Microbiology / ICAAC
5	Firehouse World Expo & Conference
6	AdvaMed 2015
7	National Association for College Admission Counseling (NACAC)
8	WEST 2015 - AFCEA & U.S. Naval Institute
9	Restaurant Facility Management Association
10	ICSC 2015 WESTERN
11	ESRI / Environmental Systems Research Institute
12	Pediatric Academic Societies Annual Meeting
13	American College of Sports Medicine 2015
14	IPC APEX Expo
15	Society of Thoracic Surgeons Annual Meeting
16	Ignite: NASSP Annual Conference
17	RealWorld 2015 User Conference
18	American Association of School Administrators National Conference
19	Council of Supply Chain Mgmt Professionals Annual Conference
20	ASCRS/ASOA Annual Symposium & Congress
21	Int'l Desalination Assn. World Congress 2015
22	Pacific Coast Builders Conference - PCBC 2015 / CBIA
23	PETCO Leadership Summit 2015
24	Society for Laboratory Automation & Screening Int'l Conf & Exh.
25	HostingCon 2015
26	Rock N' Roll Marathon Expo
27	National Indian Gaming Association Trade Show & Convention
28	IPC APEX EXPO
29	U.S. Psychiatric & Mental Health Conference
30	INFOR North America Customer & Partner Conference 2015
31	Simulation in Healthcare Annual Int'l Meeting
32	SPIE 2015 Optics + Photonics Conference
33	California Association of School Business Officials
34	American Farm bureau Federation Annual
35	CISCO Live 2015
36	Unknown SDCC Event