



Sea Otter Classic  
Economic Impact & Attendee Survey  
Report of Findings

June 2015

# Research Overview & Methodology

This report presents the findings of a survey of spectators and participating athletes of the 2015 Sea Otter Classic, conducted by Destination Analysts, Inc. on behalf of the Monterey County Convention & Visitors Bureau for the objective of estimating the economic impact of this event for the County.

The primary tool used to gather this data was an online survey of event attendees. Destination Analysts fielded the survey and branched all non-spectators to the Sea Otter Classic's group-specific surveys. Sea Otter Classic provided Destination Analysts with the athlete data. The survey was fielded from April 29 through May 4. In total, 76 fully completed surveys of event spectators were gathered. Additionally 796 surveys of participating athletes are included in the economic impact estimates. To provide inputs for the economic impact estimates, the survey collected data on attendee place of residence, spending in the Monterey County area, and motivations for attending the 2015 Sea Otter Classic.

While the primary purpose of the survey was to provide data for the economic impact estimates, a number of additional questions were asked to develop an understanding of attendees. The results of these questions are shown in the Detailed Findings and Demographics sections of this report.

# Research Overview & Methodology (continued)

The economic impact estimates provided in this report are based on 65,000 attendees to the 2015 Sea Otter Classic. This attendance number was provided by Sea Otter Classic, Inc. and adjusted for multi-day attendees.

**IMPORTANT NOTE:** Attendee spending is defined as spending in Monterey County by Sea Otter Classic event attendees *who reside outside Monterey County*. Event attendees from outside Monterey County include travelers from outside the Monterey County area visiting specifically to attend a 2015 Sea Otter Classic related event. Spending by Monterey County residents related to the event is specifically excluded from this analysis, as it cannot be claimed as an injection of new spending in the local economy.

# Economic Impact Estimates

A	Total attendance	*32,596
B	% from outside Monterey County	92.9%
C	Attendees from outside Monterey County	30,282
D	% in destination for event	94.7%
E	Incremental attendees	28,677
F	Average length of stay (nights)	2.7
G	Incremental visitor days	78,344
H	Avg. spending per day per attendee	\$210.74
I	Total incremental trip spending	\$16,510,038

*\*\*Total attendance number provided by Sea Otter Classic, Inc. and adjusted for multi-day attendees.*

# Economic Impact Estimates – Detailed Incremental Visitor Spending

## Detailed incremental visitor spend

Hotel/motel/inn	\$5,648,815
Restaurants	\$3,799,802
Retail purchases	\$3,065,701
Entertainment & sightseeing	\$718,314
Car rental fees	\$517,172
Gas, parking and local transportation	\$1,983,151
Other	\$777,083
<b>TOTAL</b>	<b>\$16,510,038</b>

Incremental attendees in hotels	12,388
Incremental room nights generated	10,848

Taxes generated	
Sales	\$923,203.92
Hotel	\$593,125.62
<b>Total</b>	<b>\$1,516,329.54</b>

# Detailed Findings

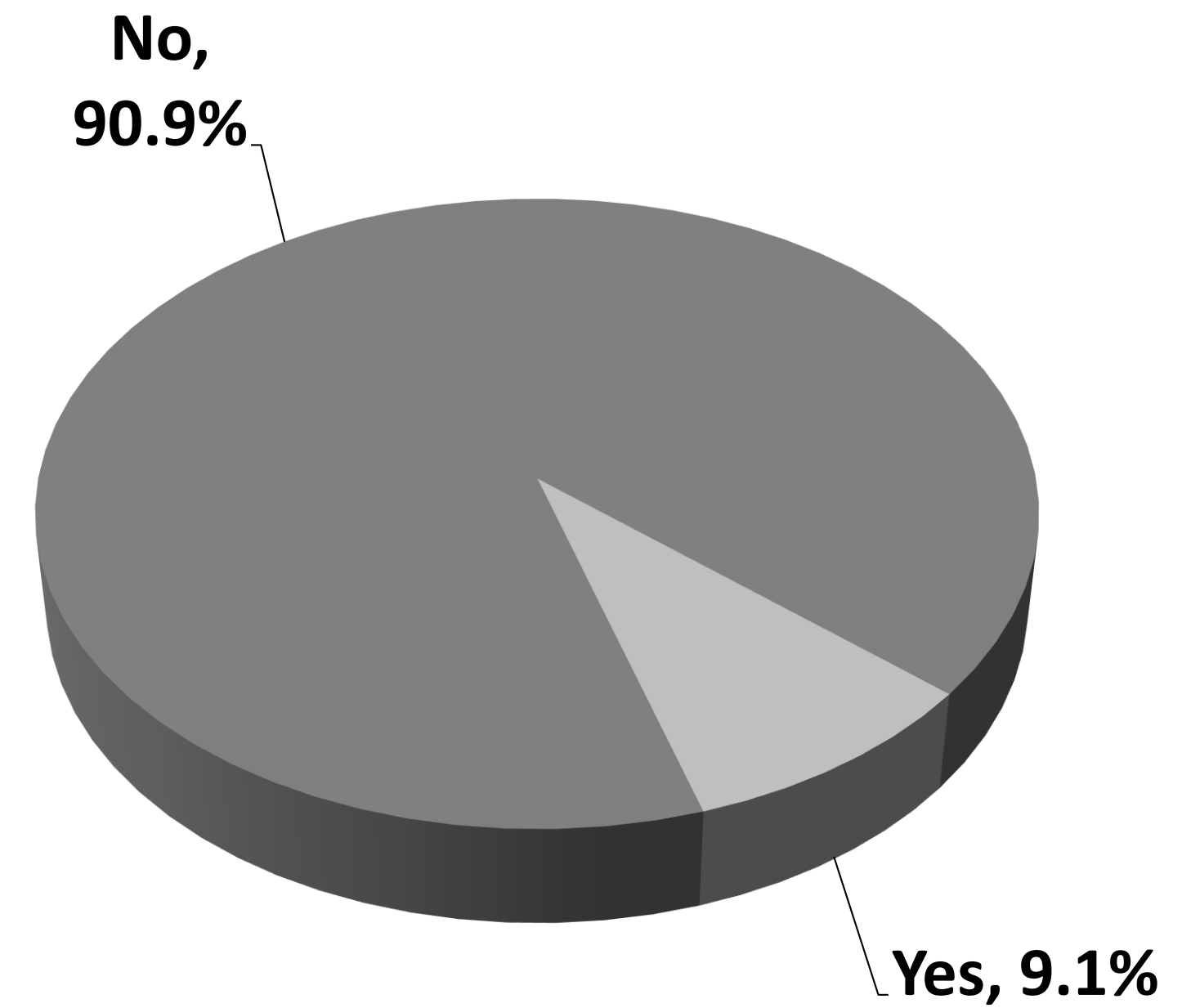
***Please note:** Data presented in this section represents the top-line data collected from all survey respondents. As data from subsamples were frequently used in the calculation of the ROI metrics presented in the previous section, the reader should use caution in making comparisons back to the ROI discussion presented earlier.*

# Monterey County Resident

Over 90 percent of Sea Otter Classic athletes and spectators surveyed live outside Monterey County (90.9%).

Question: Do you live in Monterey County, California? Base: All athletes and spectators. 880 completed surveys.

**Chart 1: Monterey County Resident (Athletes & Spectators)**

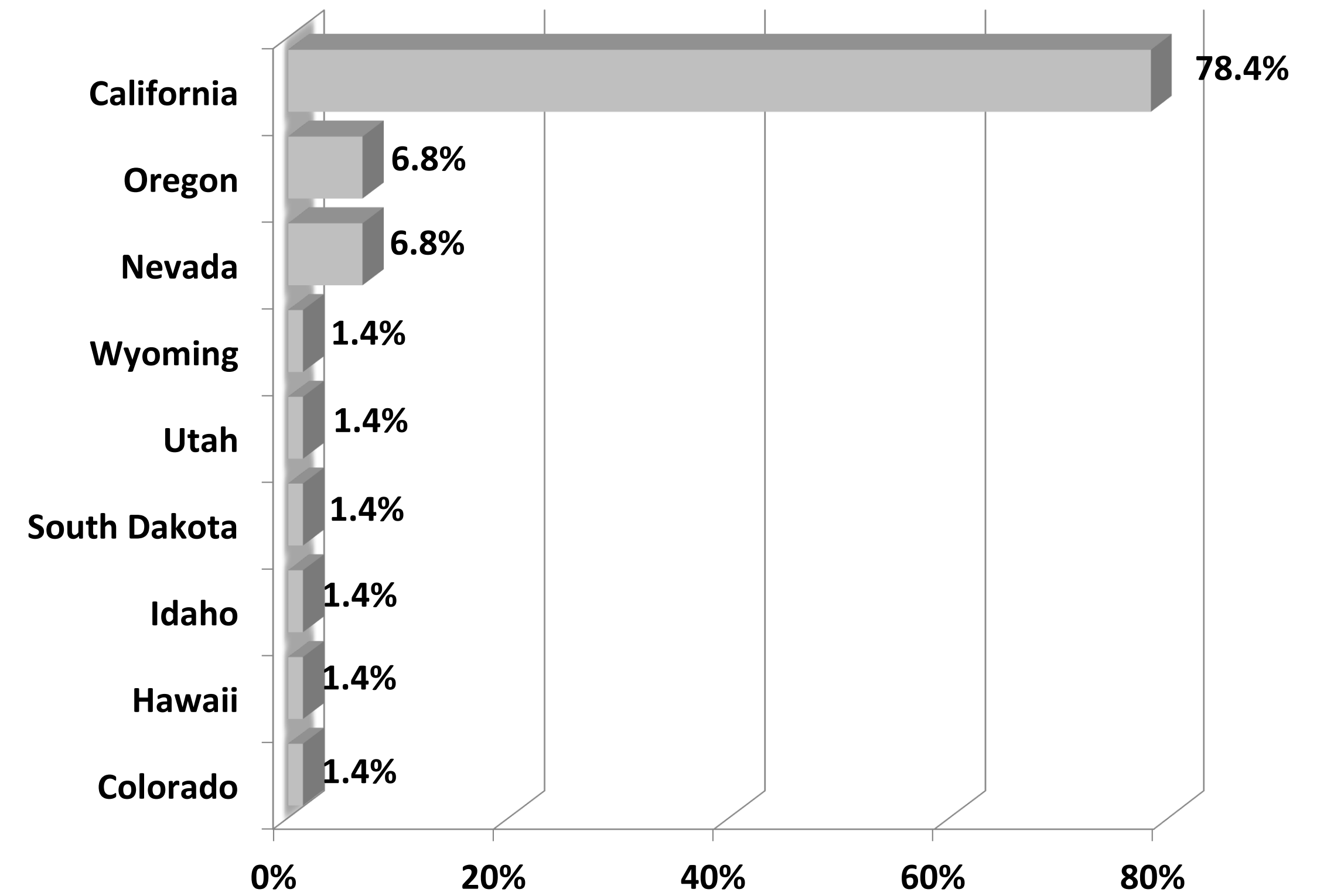


# Place of Residence

Over three quarters of Sea Otter Classic spectators surveyed who live outside Monterey County reside in California (78.4%). Additionally, 6.8 percent reside in Oregon or Nevada.

Question: What town do you live in? Base: Spectators who live outside Monterey County. 74 completed surveys.

**Chart 2: Place of Residence (Spectators Only)**



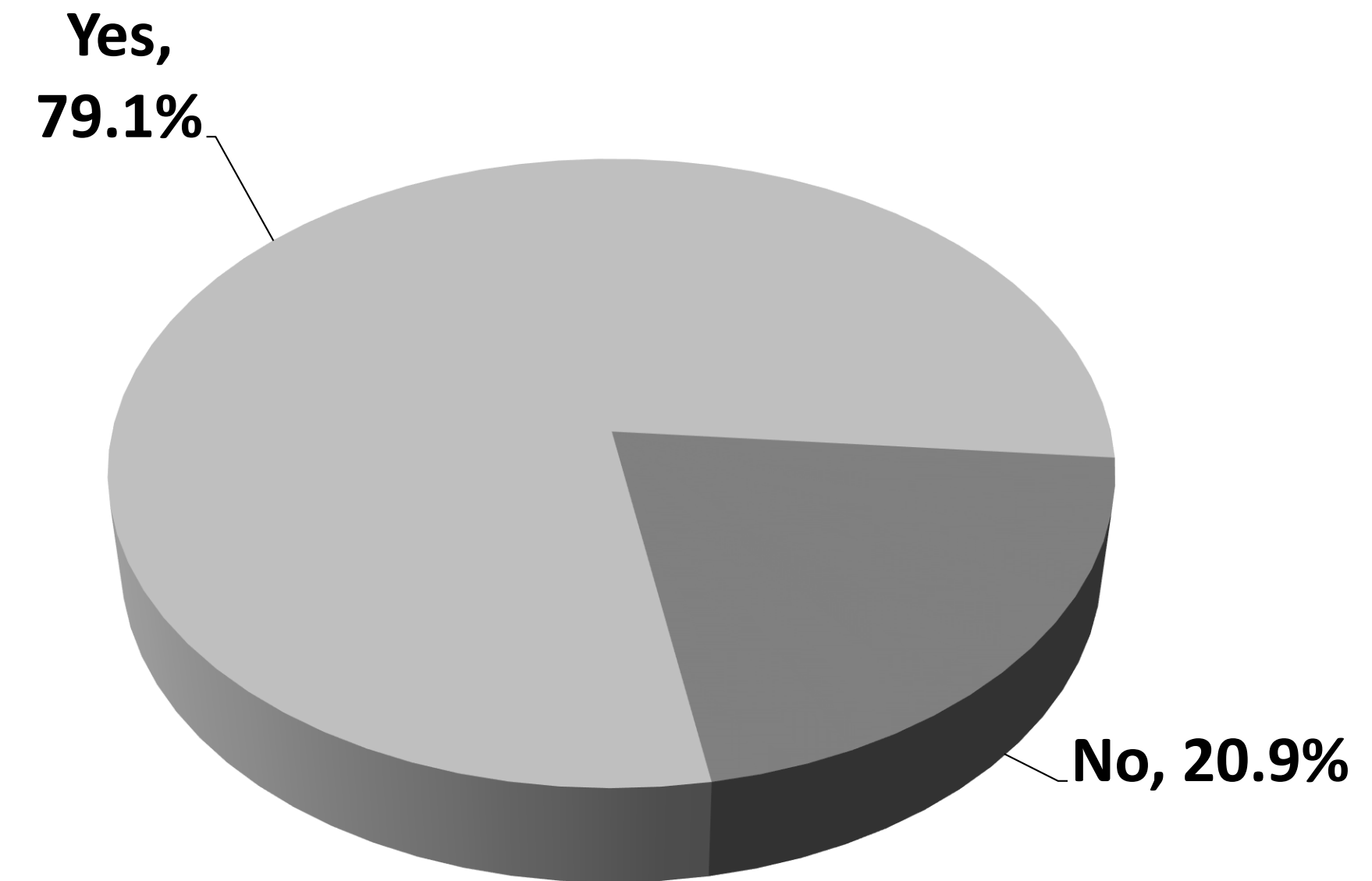


# Overnight Stay

Approximately 80 percent of athlete and spectator attendees surveyed, who live outside Monterey County, stayed overnight in Monterey County during their trip (79.1%).

Question: Did you stay overnight anywhere in Monterey County while you attended the 2015 Sea Otter Classic? Base: Athletes and Spectators who live outside of Monterey County. 785 completed surveys.

**Chart 3: Overnight Stay (Athletes & Spectators)**

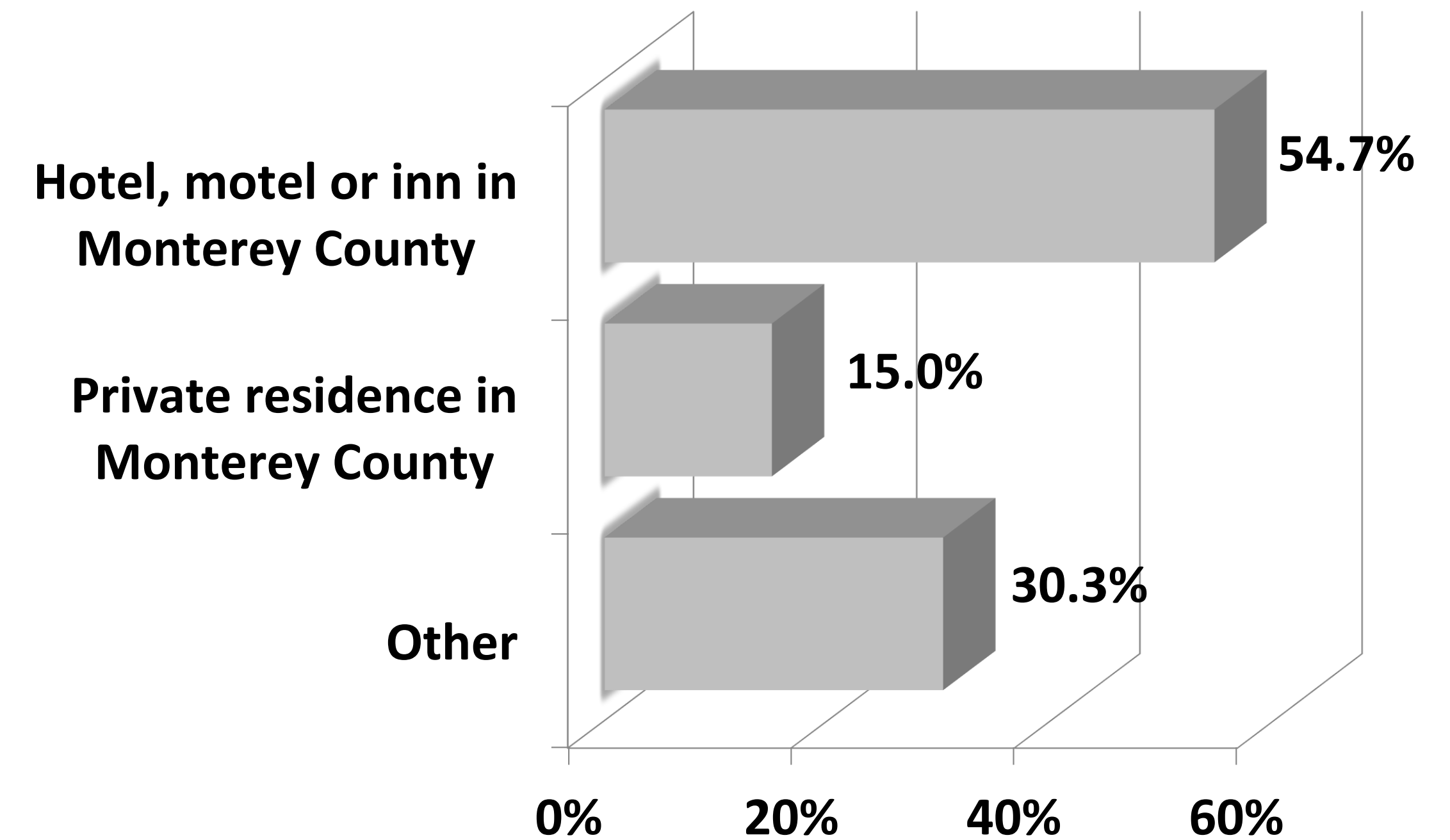


# Place of Stay

Over half of Sea Otter Classic athlete and spectator attendees surveyed who stayed overnight in Monterey County stayed in a hotel, motel or inn within Monterey County during their trip (54.7%), while 15.0 percent stayed in a private residence in Monterey County. Approximately one third of respondents stayed in other accommodations (30.3%).

Question: Where did you (or will you) stay overnight? Base: Athletes and spectators who live outside of Monterey County who are staying overnight in Monterey County. 580 completed surveys.

**Chart 4: Place of Stay (Athletes & Spectators)**

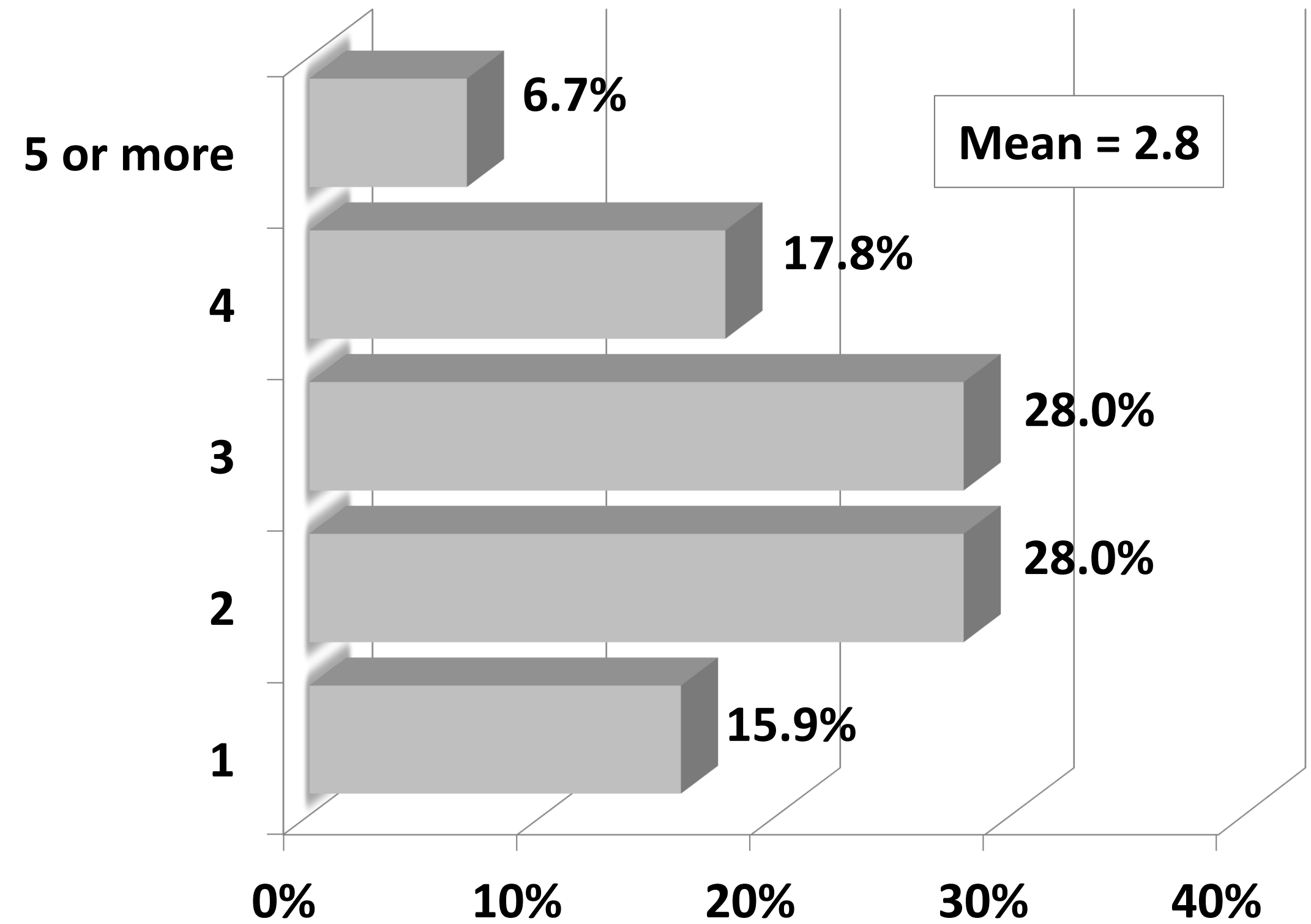


# Total Nights in Monterey County

On average, athlete and spectator attendees who stayed overnight spent 2.8 nights in Monterey County during their trip to 2015 Sea Otter Classic.

Question: How many nights did you, or will you, stay in Monterey County?  
Base: Athletes and spectators who live outside of Monterey County who are staying overnight in Monterey County. 579 completed surveys.

**Chart 4b: Total Nights in Monterey County (Athletes & Spectators)**

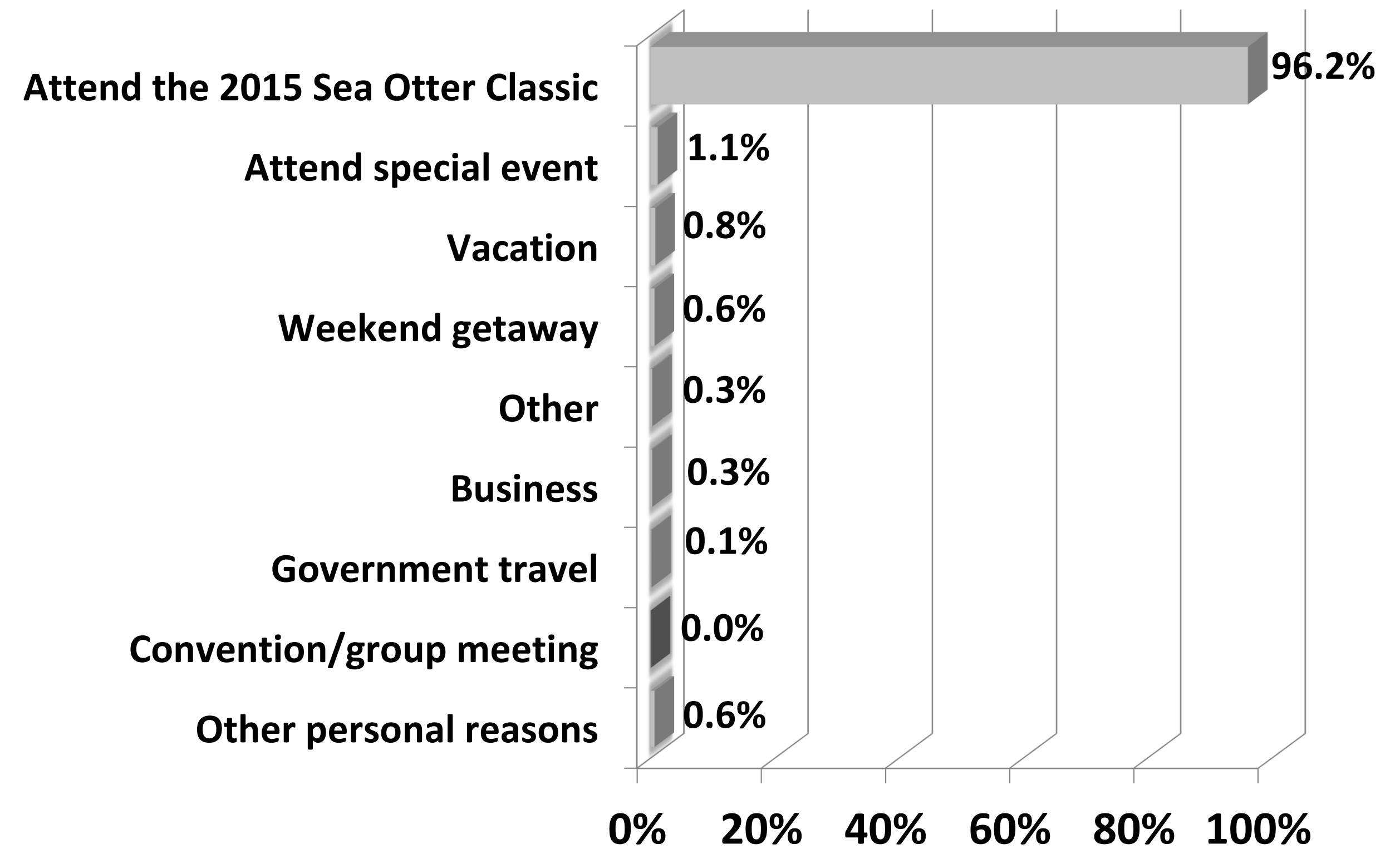


# Primary Reason for Visiting Monterey County

Over 90 percent of athlete and spectator survey respondents who live outside Monterey County primarily visited the city to attend the 2015 Sea Otter Classic (96.2%). This distinction is important, as spending by this group contributes to the total direct incremental spending used in the economic impact estimates presented earlier.

Question: What is your PRIMARY REASON for this visit Monterey County?  
Base: Athletes and spectators who live outside of Monterey County. 785 completed surveys.

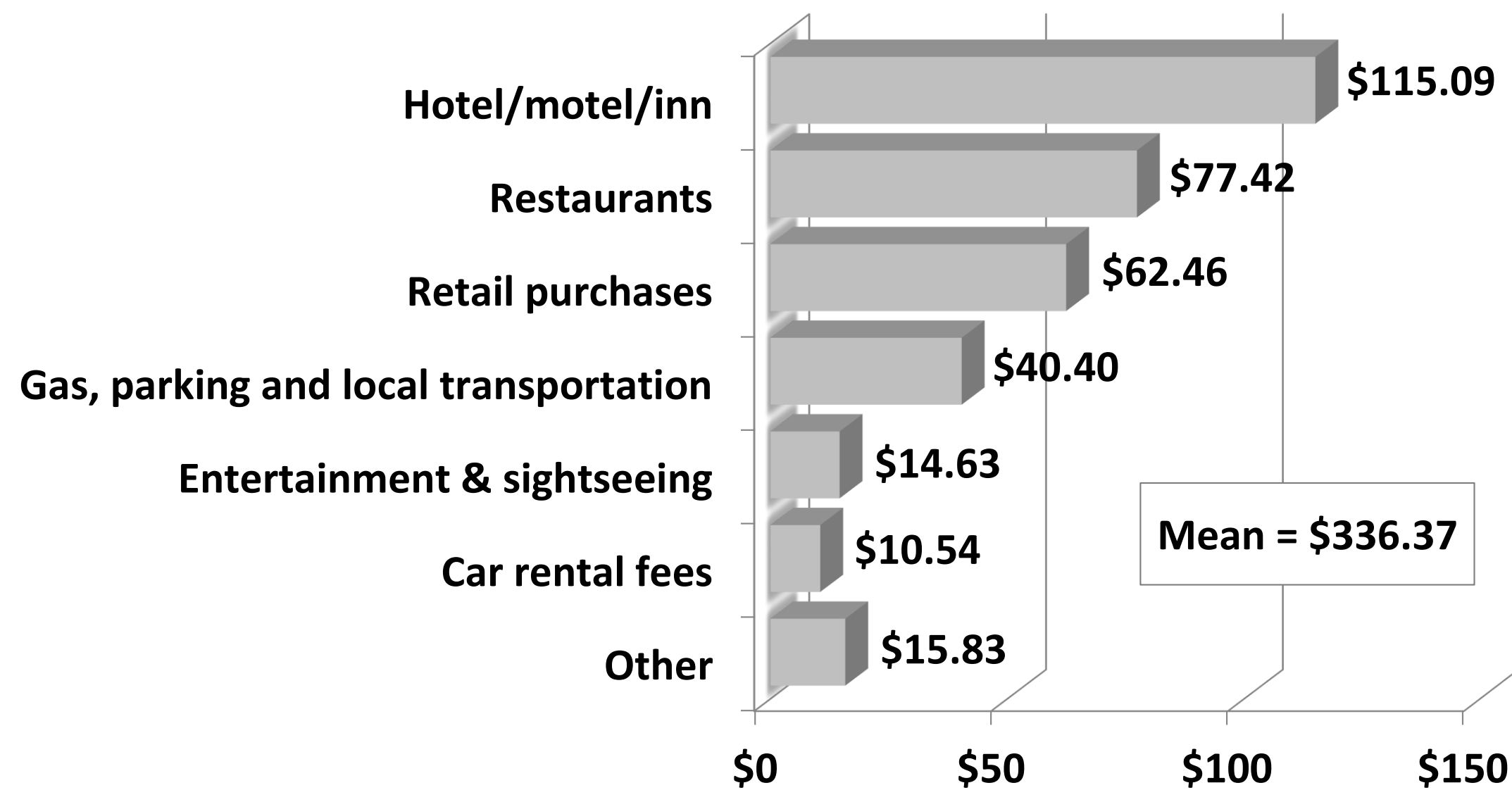
**Chart 5: Primary Reason for Visiting Monterey County (Athletes & Spectators)**



# Spending in Monterey County

Sea Otter Classic participating athletes and spectators who live outside Monterey County spent an average of \$336.37 per day while in Monterey. The largest share of this spending went to overnight accommodations (\$115.09), followed by restaurants and dining (\$77.42) and retail purchases (\$62.46). As shown in the table below, Sea Otter Classic attendees staying overnight in Monterey County hotels represent the greatest visitor spending impact at \$428.06 per day.

**Chart 6: Spending in Monterey County (Athletes & Spectators)**



**Detail by Type of Visitor**

	All Visitor	Day Tripper	All Overnight	Hotel Guest
Hotel/motel/inn	\$115.09	--	\$134.76	\$188.57
Restaurants	\$77.42	\$30.94	\$86.08	\$107.15
Retail purchases	\$62.46	\$55.87	\$63.68	\$57.81
Gas, parking and local transportation	\$40.40	\$39.08	\$40.65	\$37.46
Entertainment & sightseeing	\$14.63	\$9.92	\$15.51	\$15.65
Car rental fees	\$10.54	\$16.65	\$9.40	\$12.14
Other	\$15.83	\$7.42	\$17.40	\$9.27
<b>Mean</b>	<b>\$336.37</b>	<b>\$159.88</b>	<b>\$367.49</b>	<b>\$428.06</b>
<b>Sample Size</b>	<b>668</b>	<b>105</b>	<b>563</b>	<b>311</b>

Question: Approximately how much PER DAY will you spend on the following while in Monterey County? Please only include spending inside Monterey County.

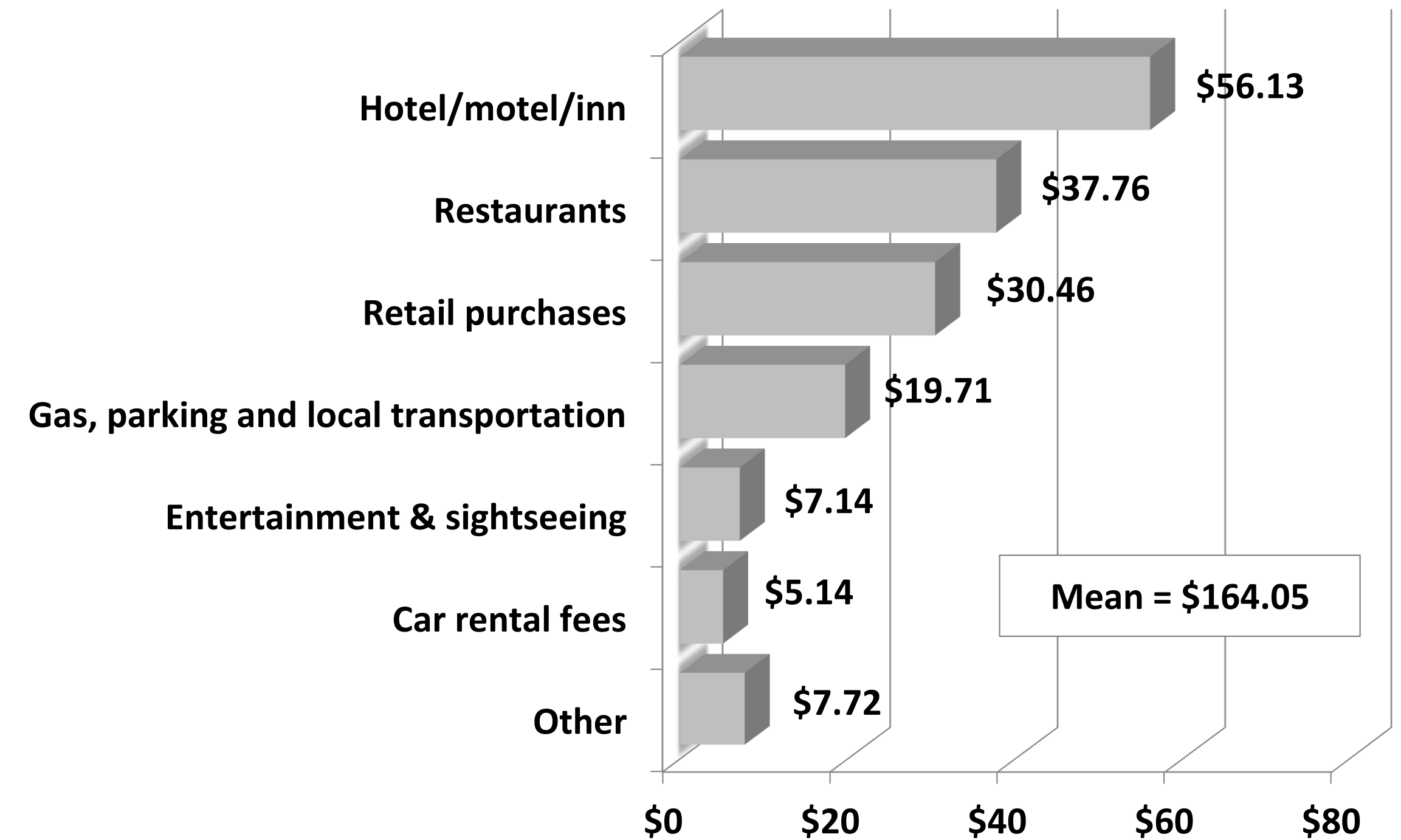
Base: Spectators and participating athletes who live outside of Monterey County. 668 completed surveys.

# Trip Spending, Per Person

The reported trip spending on the previous slide covered an average of 2.1 people. Thus the average per person trip spending is estimated to be \$164.05.

Question: How many 2015 Sea Otter Classic attendees did the spending you reported above cover? Base: Spectators & participating athletes who live outside of Monterey County. 668 completed surveys.

**Chart 7: Trip Spending, Per Person (Athletes & Spectators)**

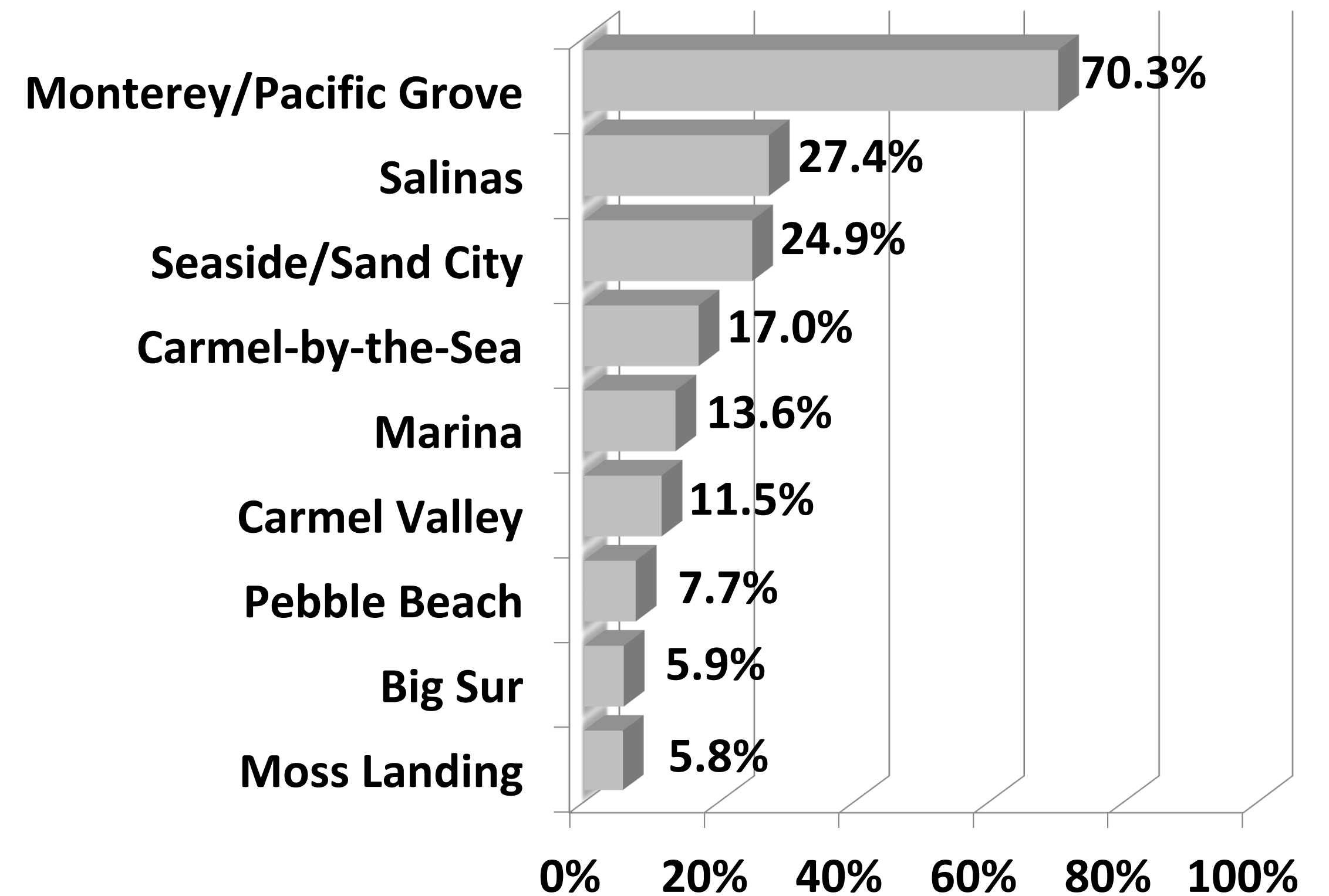


# Areas Visited During Trip

When asked which areas of the County they visited as a part of their trip to the 2015 Sea Otter Classic, 70.3 percent of attendees surveyed reported visiting Monterey/Pacific Grove. This was followed by Salinas (27.4%), Seaside/Sand City (24.9%) and Carmel-by-the-Sea (17.0%).

Question: Which of these Monterey County areas did you visit on this trip? (Select all that apply) Base: Athletes and spectators who live outside of Monterey County. 730 completed surveys.

**Chart 8: Areas Visited During Trip (Athletes & Spectators)**

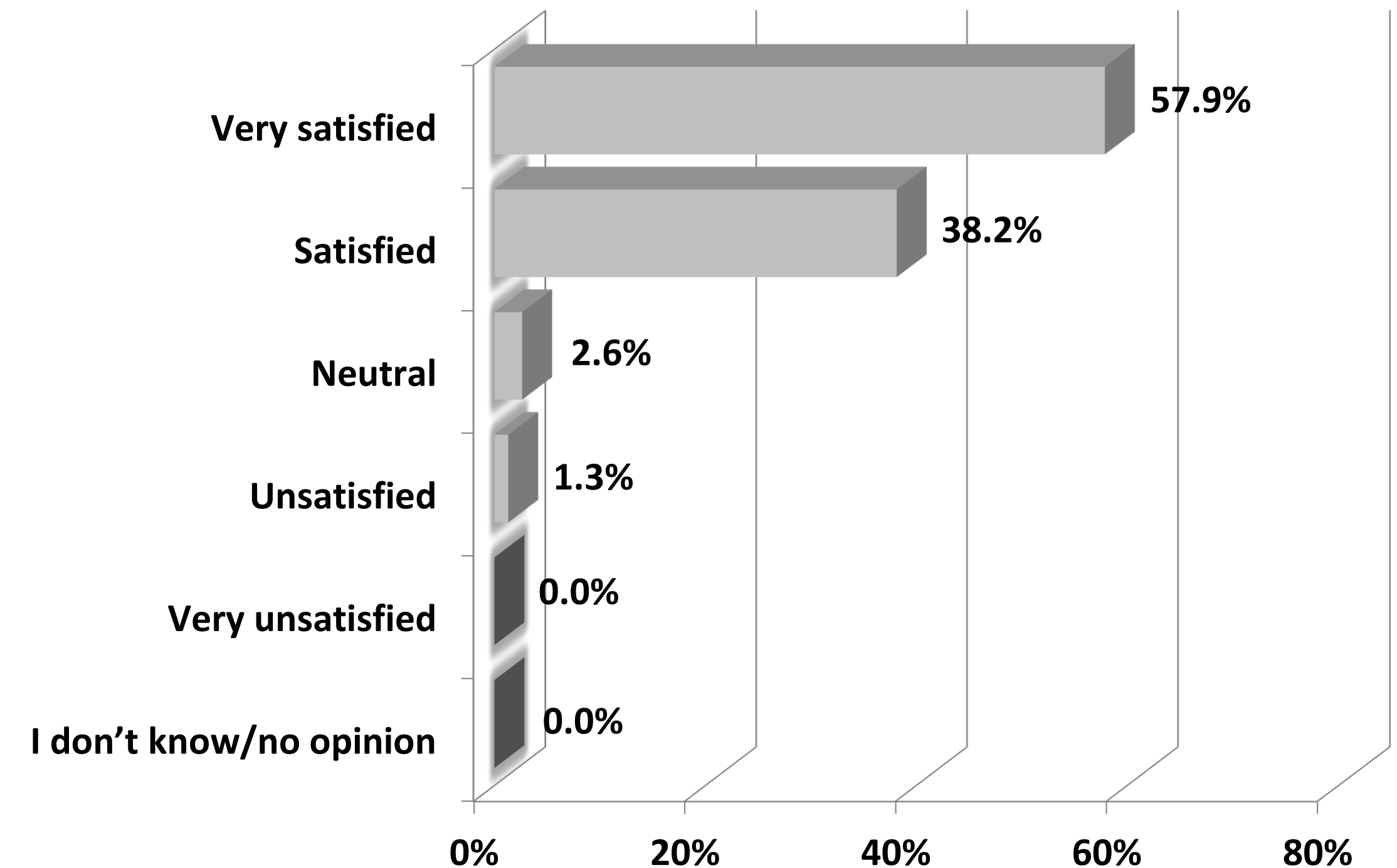


# Satisfaction with Monterey County Experience

Nearly all Sea Otter Classic spectators surveyed expressed great satisfaction with their Monterey County experience. 96.1 percent of respondents said they were either “satisfied” (38.2%) or “very satisfied” (57.9%). Only 1.3 percent of respondents expressed dissatisfaction.

Question How satisfied are you with your overall experience in Monterey County? Base: Spectators who live outside of Monterey County. 76 completed surveys.

**Chart 9: Satisfaction with Monterey County Experience (Spectators Only)**



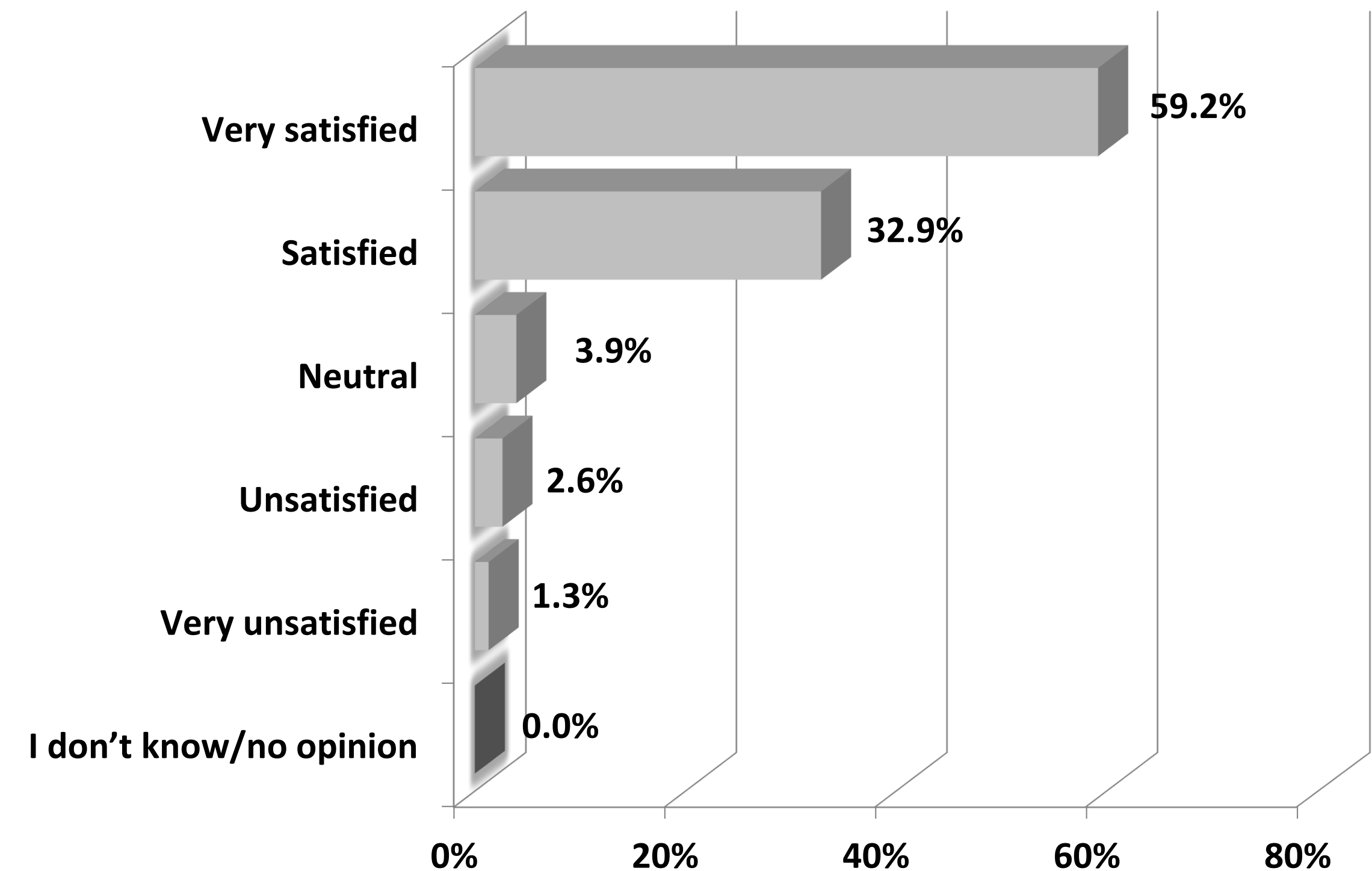


# Satisfaction with Sea Otter Classic Experience

The 2015 Sea Otter Classic provides a highly satisfactory experience. Using a five-point scale from “Very satisfied” to “Very unsatisfied,” survey respondents were asked to rate their satisfaction with the event. Nine in ten spectators said they were “satisfied” (32.9%) or “very satisfied” (59.2%) with their experience.

Question How satisfied are you with your experience at the 2015 Sea Otter Classic? Base: All spectators. 76 completed surveys.

**Chart 10: Satisfaction with Grand Prix Experience (Spectators Only)**

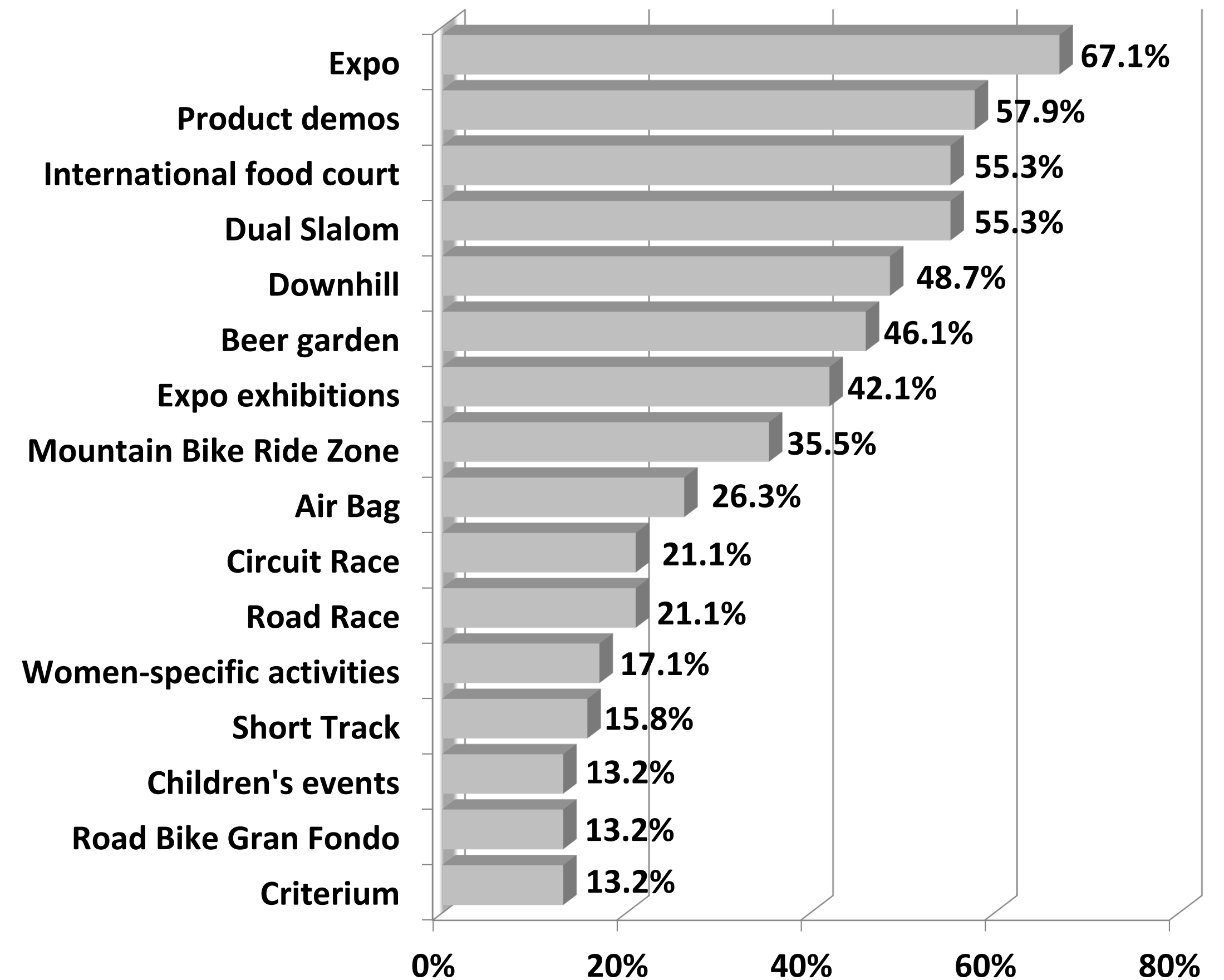


# Sea Otter Classic Events Attended

Sea Otter Classic spectators were asked which events they attended or planned to attend during their visit. 50 percent or more said they would attend or participate in the expo (67.1%), product demos (57.9%), the international food court (55.3%) and the dual slalom (55.3%).

Question: Which events or activities did you attend, participate in, or watch at the 2015 Sea Otter Classic? (Select all that apply) Base: All spectators. 76 completed surveys.

**Chart 11: Grand Prix Events Attended (Spectators Only)**

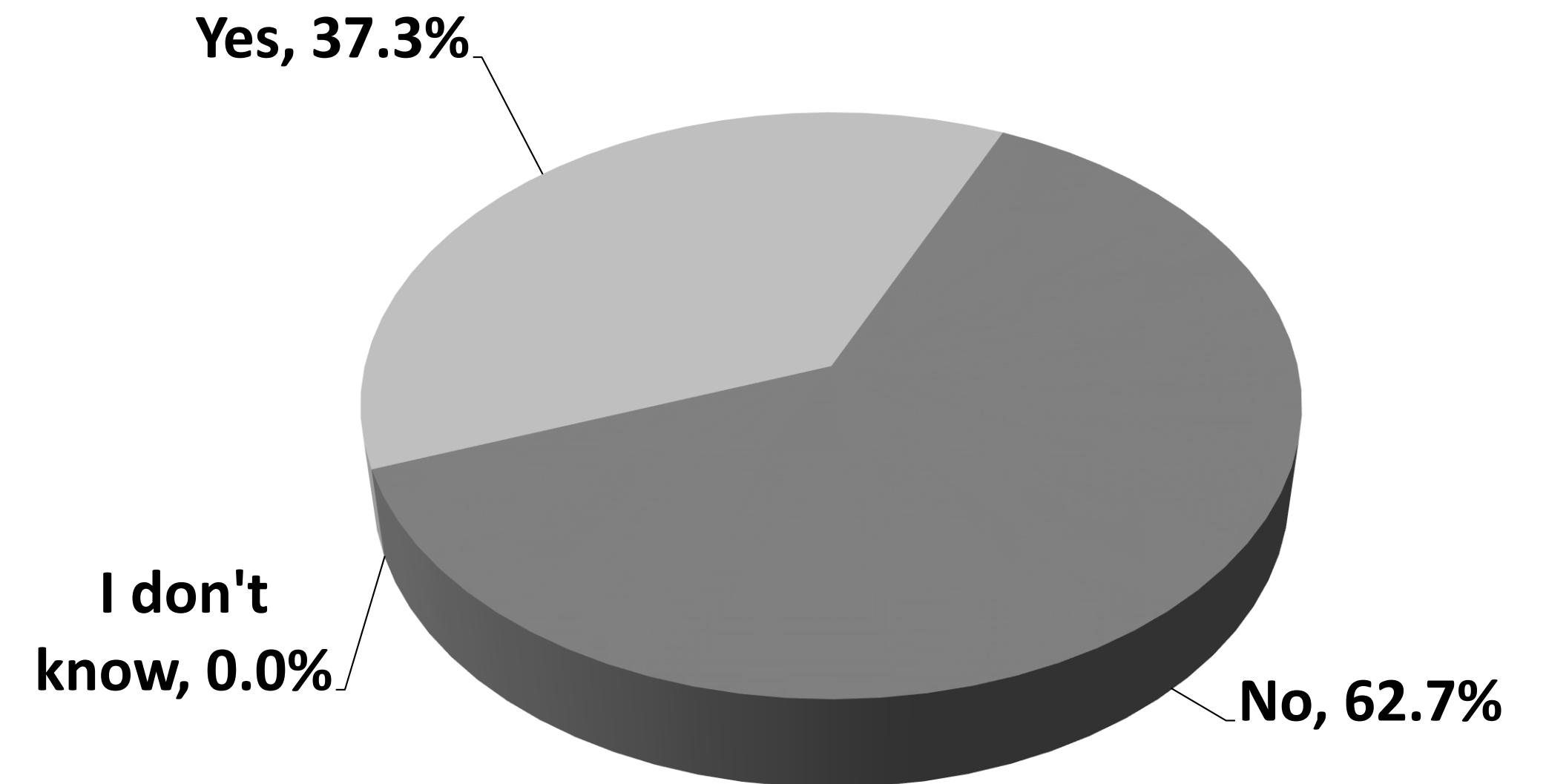


# Children in Party

Approximately one in three spectators surveyed attended the 2015 Sea Otter Classic with children under the age of 18 (37.3%).

Question Do you have children under 18 with you at the event today? Base: All spectators. 75 completed surveys.

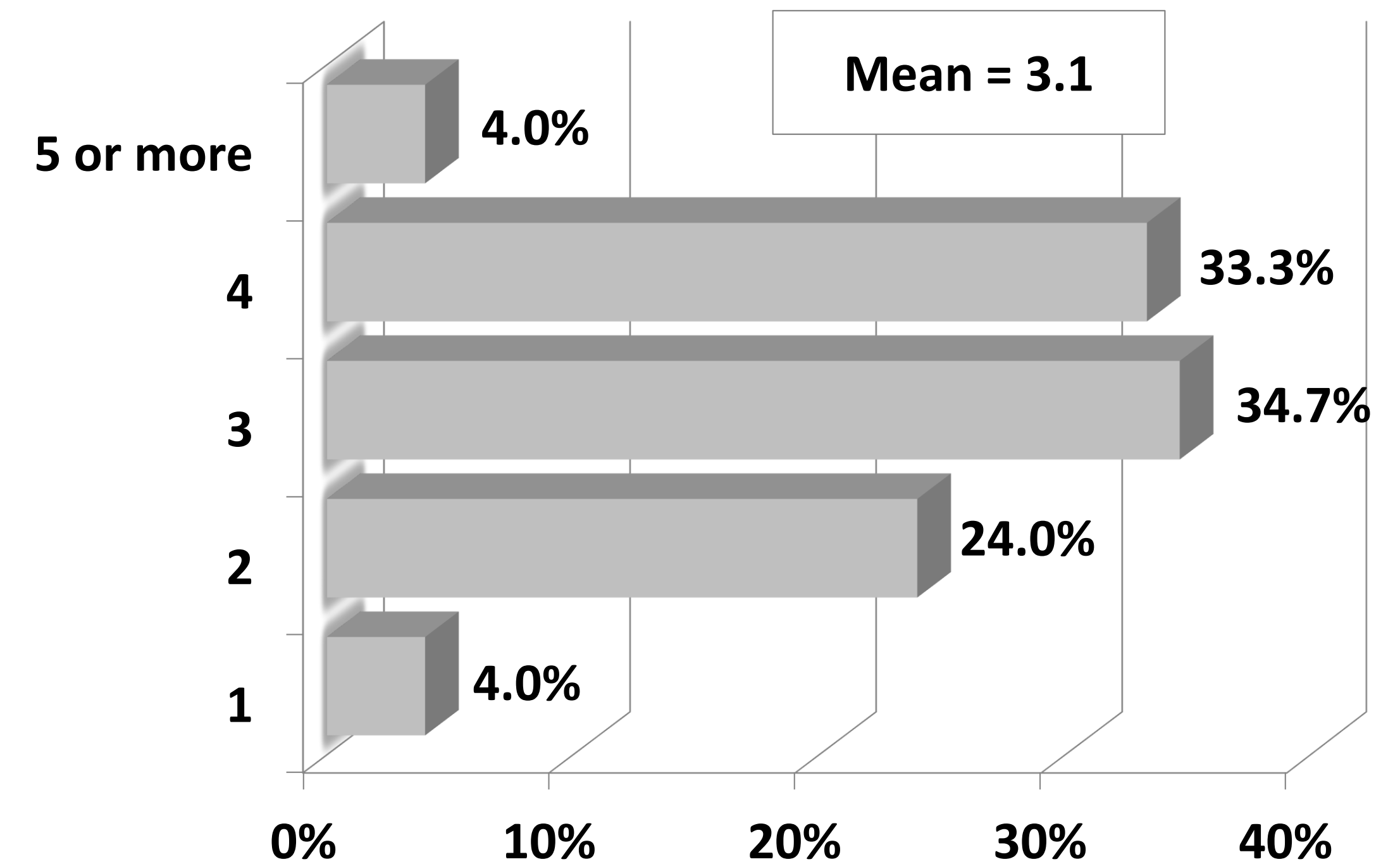
**Chart 12: Children in Party (Spectators Only)**



# Days Spent at Grand Prix

On average, spectators (including Monterey County residents) spent approximately 3.1 days at the Sea Otter Classic.

**Chart 13: Days Spent at Grand Prix (Spectators Only)**



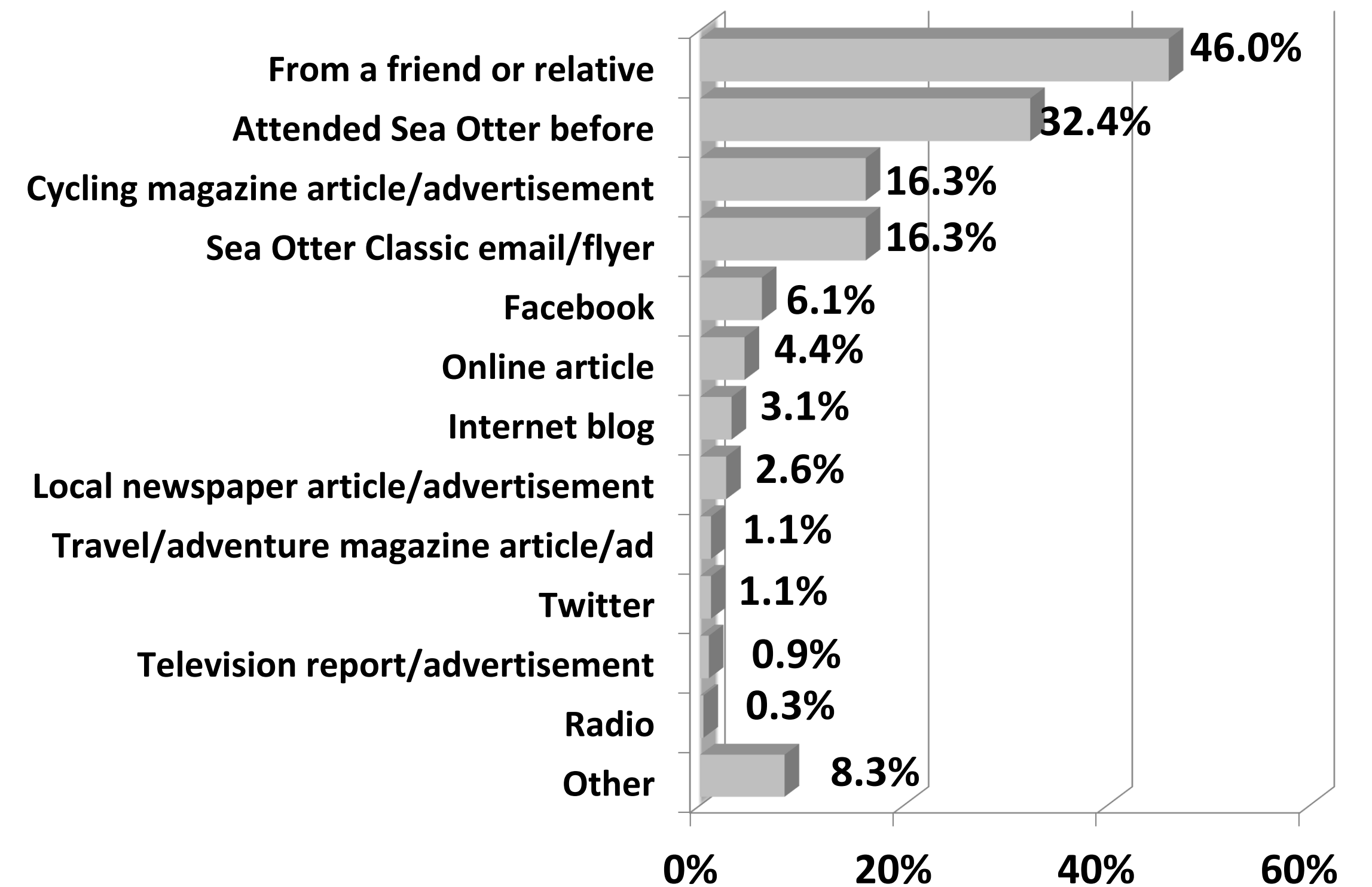
Question How many days did you attend the 2015 Sea Otter Classic? Base: All spectators. 75 completed surveys.

# How Attendee Heard About Event

2015 Sea Otter Classic athletes and spectators were asked how they heard about the event. Nearly half of respondents reported hearing about the event from a friend or relative (46.0%) and 32.4 percent have attended the Sea Otter Classic before.

Question How did you hear about the 2015 Sea Otter Classic? (Select all that apply) Base: All athletes and spectators. 941 completed surveys.

**Chart 14: How Attendee Heard About Event (Athletes & Spectators)**





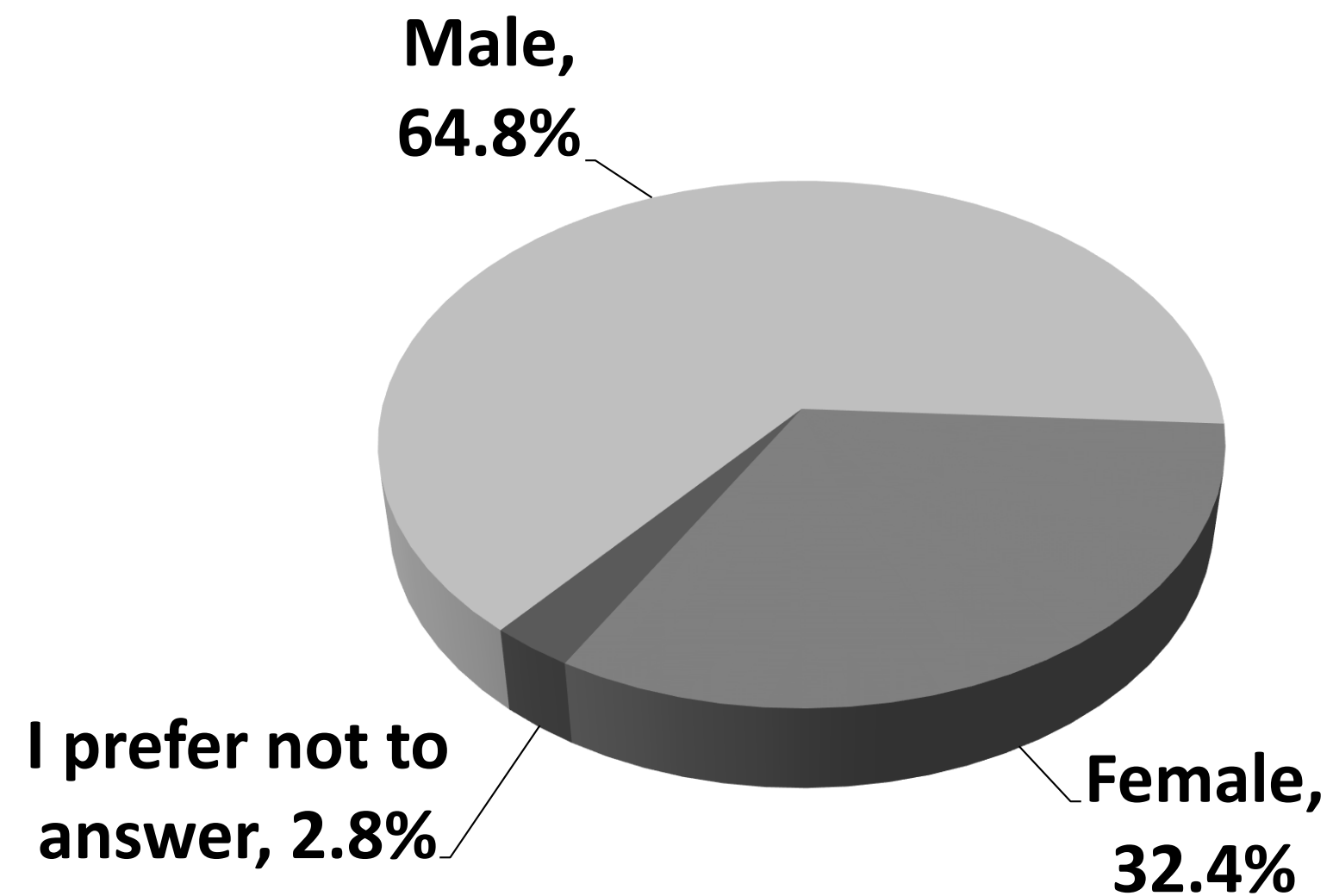
# Sample Demographics



# Gender

Spectator survey respondents skewed male (64.8%).

Chart 15: Gender (Spectators Only)



Question: Gender

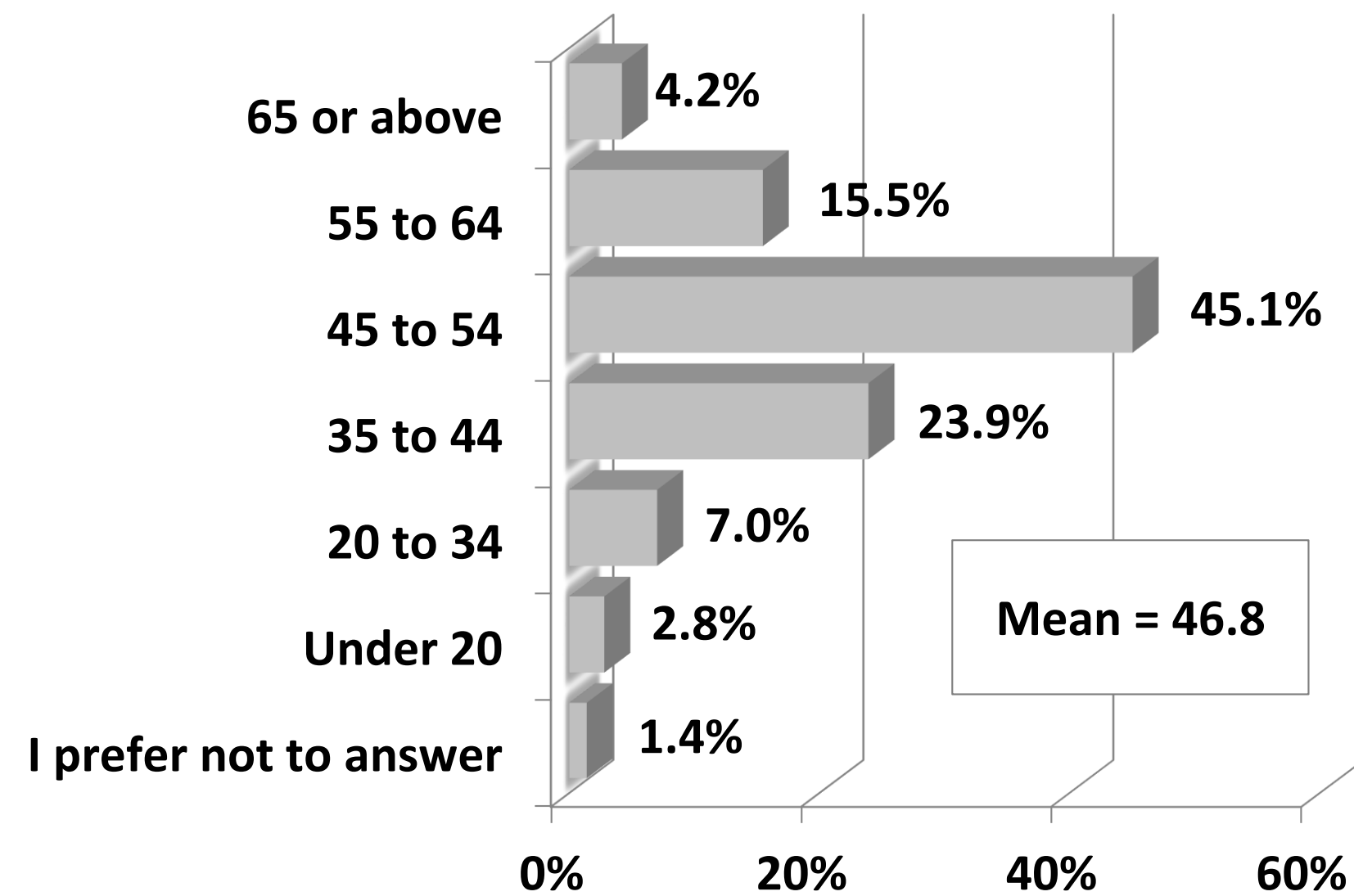
Detail by Place of Residence

	All Respondents	Non Monterey County Residents
Male	64.8%	66.7%
Female	32.4%	31.8%
I prefer not to answer	2.8%	1.5%
<b>Sample Size</b>	<b>71</b>	<b>66</b>

Base: All respondents. 71 completed surveys

The average age of Sea Otter Classic spectators surveyed was 46.8 years.

**Chart 16: Age (Spectators Only)**



**Detail by Place of Residence**

	All Respondents	Non Monterey County Residents
65 or above	4.2%	4.5%
55 to 64	15.5%	16.7%
45 to 54	45.1%	43.9%
35 to 44	23.9%	22.7%
20 to 34	7.0%	7.6%
Under 20	2.8%	3.0%
I prefer not to answer	1.4%	1.5%
<b>Mean</b>	<b>46.8</b>	<b>46.9</b>
<b>Sample Size</b>	<b>71</b>	<b>66</b>

Question: Which is your age?

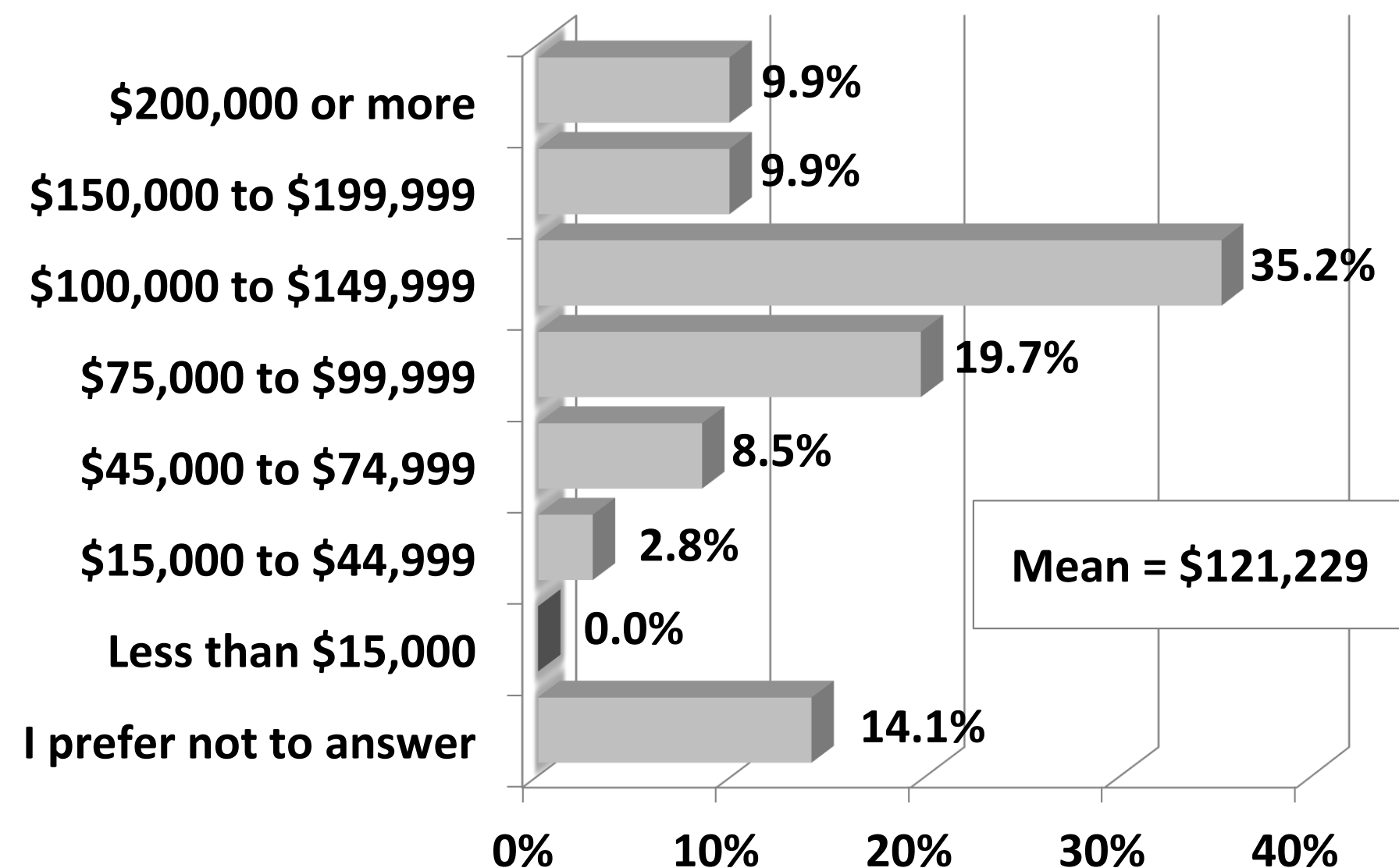
Base: All respondents. 71 completed surveys



# Annual Household Income

Sea Otter Classic spectators surveyed are an affluent group, with the average annual household income being \$121,229. Visiting attendees who live outside Monterey County had an average household income of \$119,776.

**Chart 17: Annual Household Income (Spectators Only)**



Question: Which of the following best describes the combined annual income of all members of your household?

**Detail by Place of Residence**

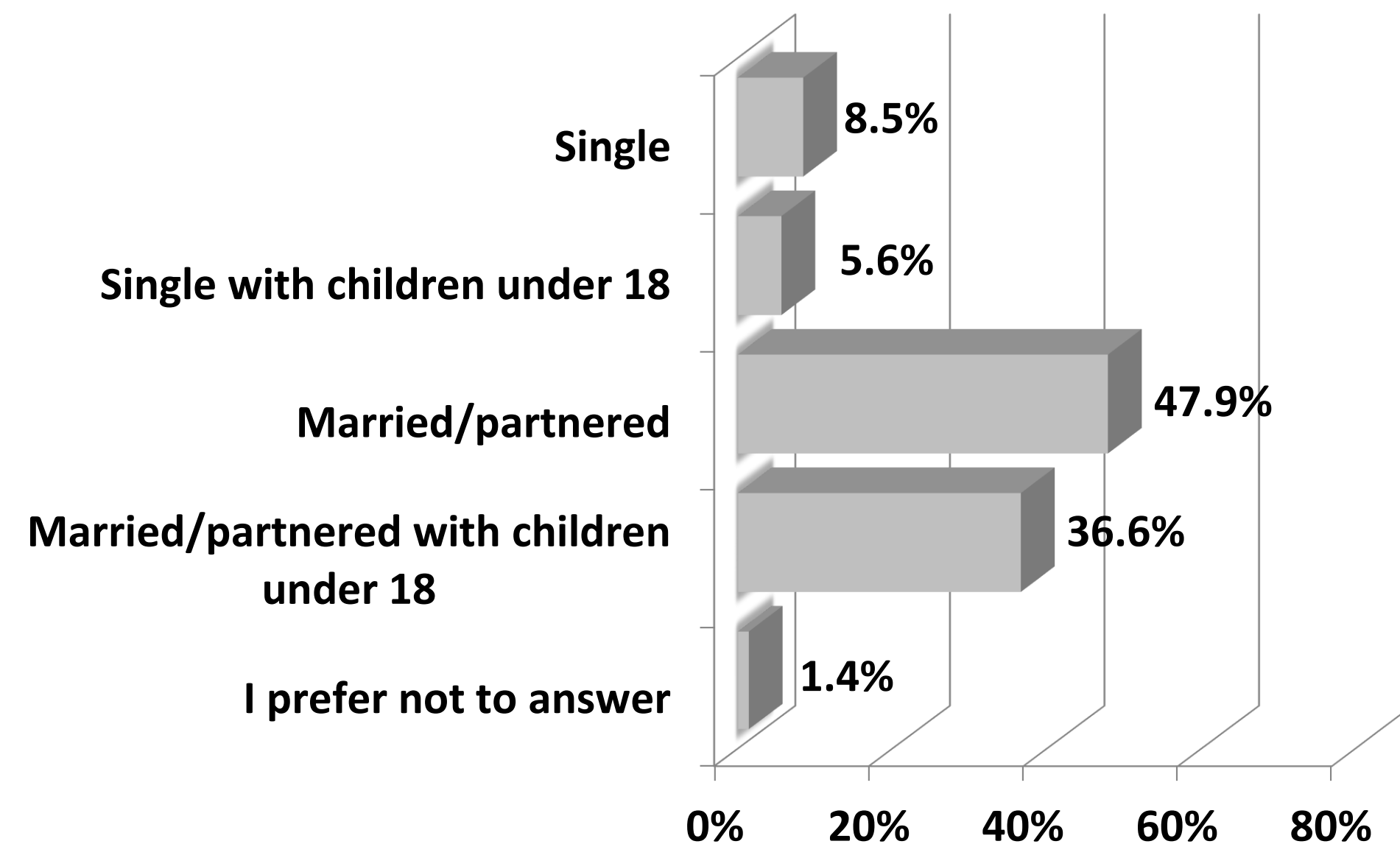
	All Respondents	Non Monterey County Residents
\$200,000 or more	9.9%	10.6%
\$150,000 to \$199,999	9.9%	7.6%
\$100,000 to \$149,999	35.2%	34.8%
\$75,000 to \$99,999	19.7%	19.7%
\$45,000 to \$74,999	8.5%	9.1%
\$15,000 to \$44,999	2.8%	3.0%
Less than \$15,000	0.0%	0.0%
I prefer not to answer	14.1%	15.2%
<b>Mean</b>	<b>\$121,229</b>	<b>\$119,776</b>
<b>Sample Size</b>	<b>71</b>	<b>66</b>

Base: All respondents. 71 completed surveys

# Marital Status

Over 80 percent of spectator respondents are married (84.5%), while 14.1 percent are single. 42.3 percent have children under age 18.

**Chart 18: Marital Status (Spectators Only)**



Question: Which of the following best describes your current marital status?

**Detail by Place of Residence**

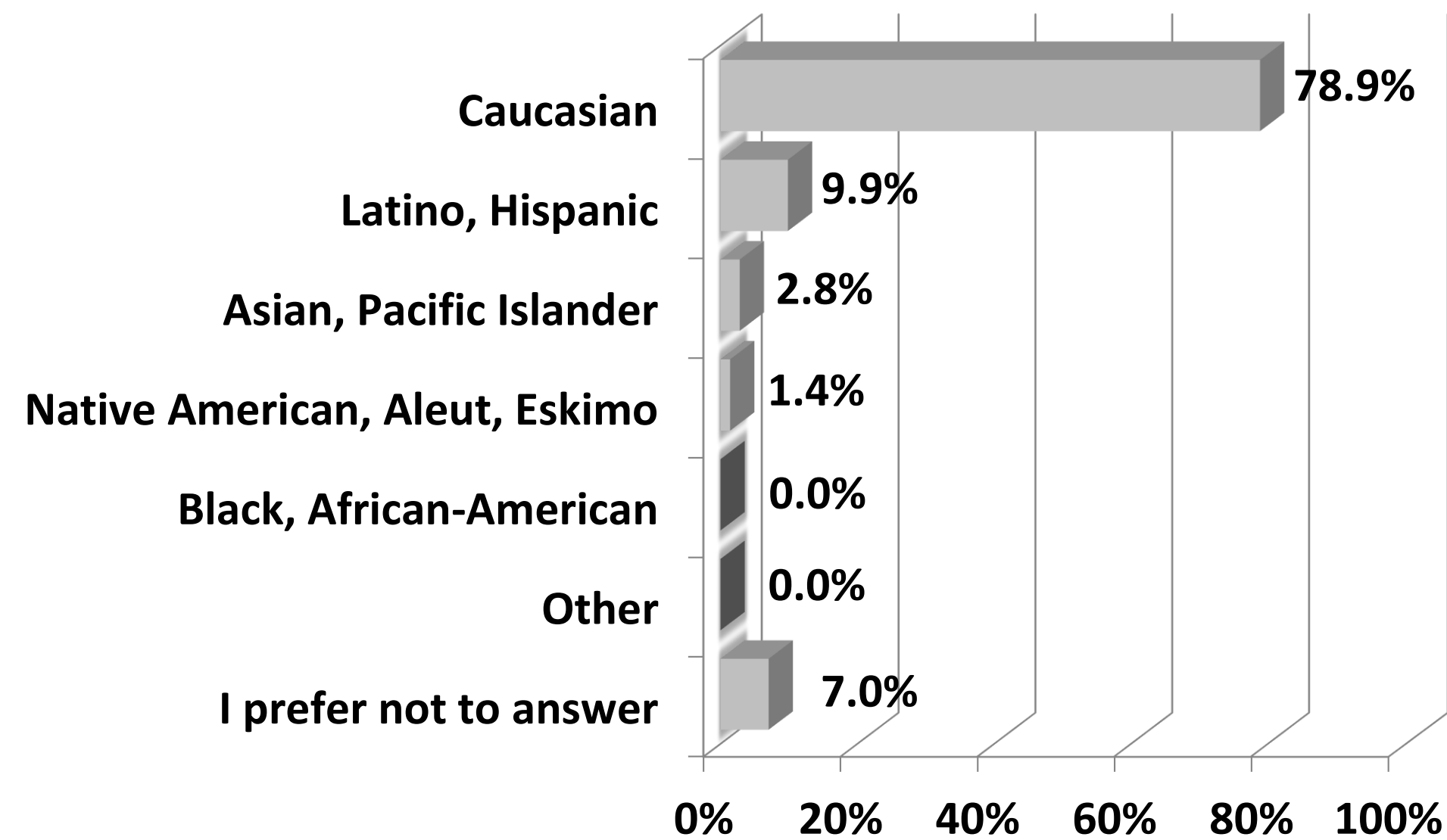
	All Respondents	Non Monterey County Residents
Single	8.5%	9.1%
Single with children under 18	5.6%	6.1%
Married/partnered	47.9%	45.5%
Married/partnered with children under 18	36.6%	37.9%
I prefer not to answer	1.4%	1.5%
<b>Sample Size</b>	<b>71</b>	<b>66</b>

Base: All respondents. 71 completed surveys

# Ethnicity

While 78.9 percent of spectator respondents identify as Caucasian, 9.9 percent identify as Latino/Hispanic and 2.8 percent are Asian, Pacific Islander.

**Chart 19: Ethnicity (Spectators Only)**



Question: Which best describes your ethnicity?

**Detail by Place of Residence**

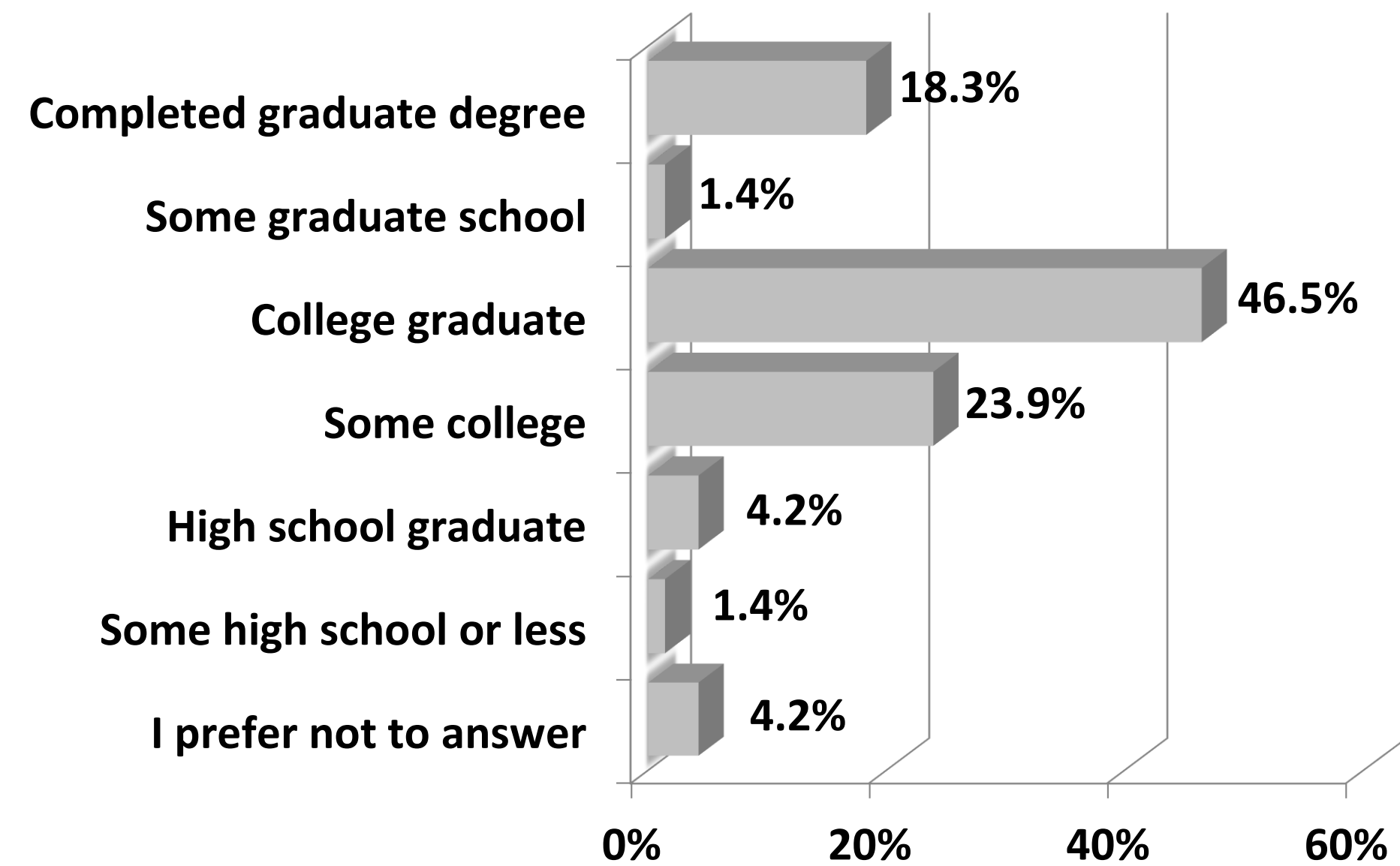
	All Respondents	Non Monterey County Residents
Caucasian	78.9%	77.3%
Latino, Hispanic	9.9%	10.6%
Black, African-American	2.8%	3.0%
Asian, Pacific Islander	1.4%	1.5%
Native American, Aleut, Eskimo	0.0%	0.0%
Other	0.0%	0.0%
I prefer not to answer	7.0%	7.6%
<b>Sample Size</b>	<b>71</b>	<b>66</b>

Base: All respondents. 71 completed surveys

# Education

66.2 percent of spectators surveyed have a bachelors degree, including 18.3 percent who hold a graduate degree.

**Chart 20: Education (Spectators Only)**



Question: What is your highest level of formal education? (Select one)

**Detail by Place of Residence**

	All Respondents	Non Monterey County Residents
Completed graduate degree	18.3%	18.2%
Some graduate school	1.4%	1.5%
College graduate	46.5%	47.0%
Some college	23.9%	22.7%
High school graduate	4.2%	4.5%
Some high school or less	1.4%	1.5%
I prefer not to answer	4.2%	4.5%
<b>Sample Size</b>	<b>71</b>	<b>66</b>

Base: All respondents. 71 completed surveys