

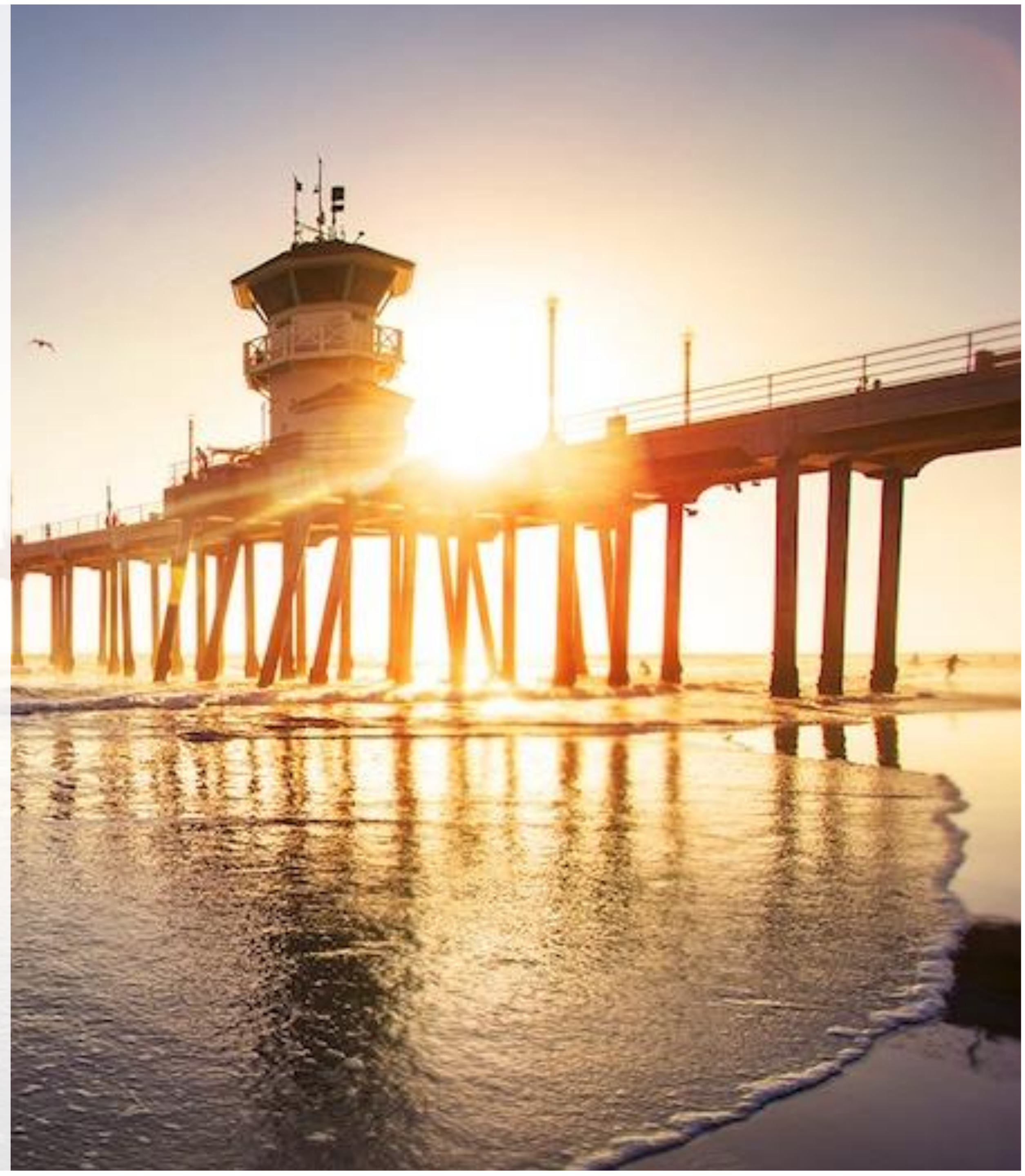


# 2018 Vans U.S. Open of Surfing Event Economic Impact Study

Final Report of Findings  
January 2019

*Research prepared for Visit Huntington Beach by*

Destination  Analysts





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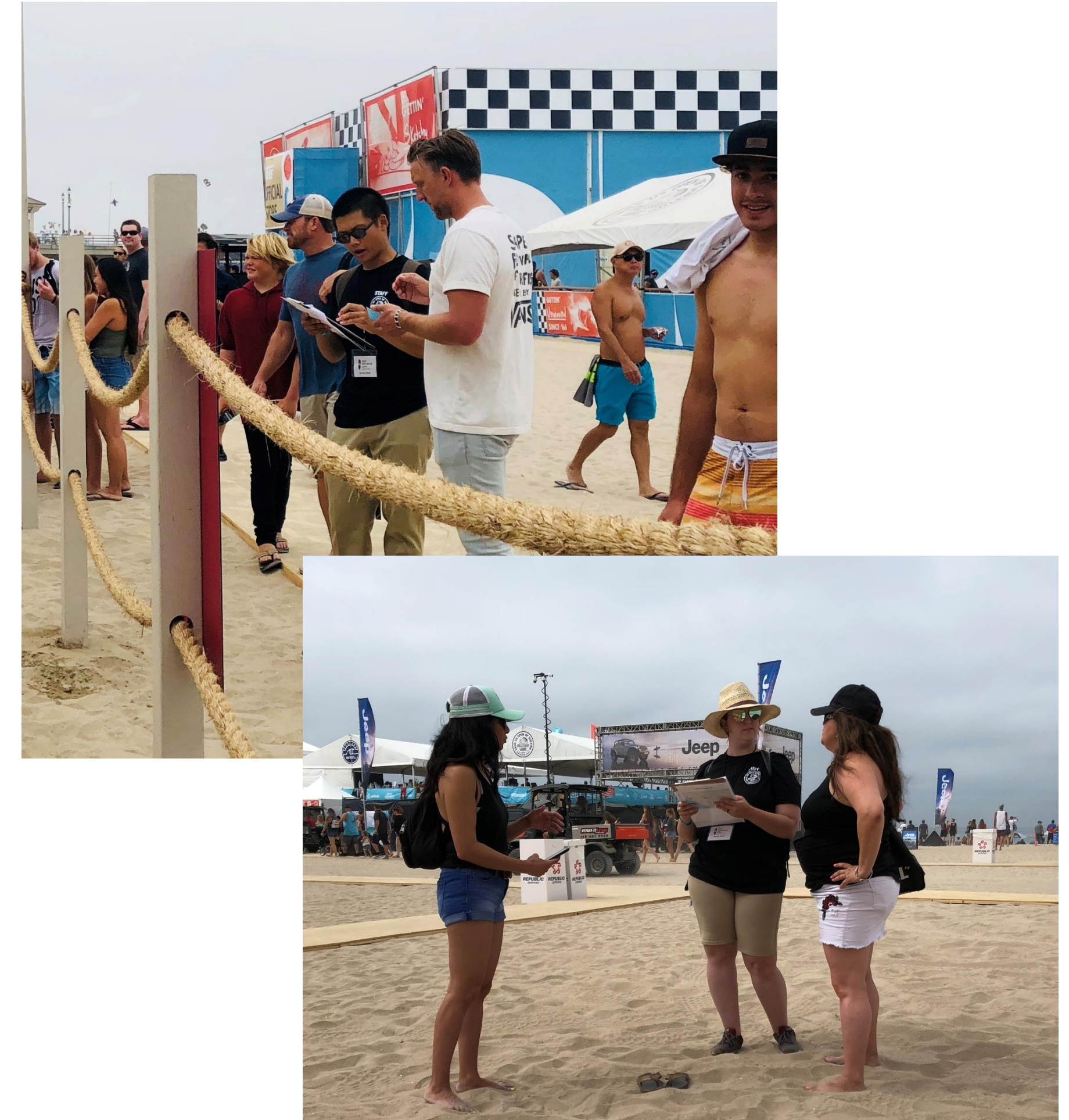
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# Research Overview

This report presents the findings of an economic impact study of the 2018 Vans U.S. Open of Surfing. This study was commissioned by Visit Huntington Beach and conducted by market research firm Destination Analysts, Inc. For this project, Visit Huntington Beach and Destination Analysts worked closely to develop a survey questionnaire which collected data necessary to estimate the economic impact of the event to Huntington Beach, as well as assess visitor satisfaction with both the event and their overall experience in the city.

An intercept survey methodology was used to collect data from event attendees. The survey was fielded during two separate waves: July 28<sup>th</sup> - 30<sup>th</sup> and August 2<sup>nd</sup> - 5<sup>th</sup>.

Destination Analysts field team also conducted an incidence test during the event in order to estimate the ratio of visitors to Huntington Beach and Orange County residents at the event. Data collected from the incidence test was used to weight the final data set of long-form surveys in order to accurately reflect the appropriate proportions of attendees by place of residence and place of stay.



*Destination Analysts' research team surveying Vans U.S. Open of Surfing Attendees*



# Methodology



For the intercept survey, Destination Analysts' survey team canvased the public areas of the Van's U.S. Open of Surfing Village and randomly sampled attendees. To provide inputs for the economic impact estimates, the survey collected data on attendee place of residence, spending in Huntington Beach, and motivations for attending the Vans U.S. Open of Surfing. If the event attendee was a visitor to Huntington Beach—defined as residing outside the city—they continued on to complete the full questionnaire. Huntington Beach residents were branched forward in the survey and did not answer questions related to visiting the city. In total, 745 surveys were collected; 158 from local residents and 587 from visitors who reside outside Huntington Beach. *The topline data presented here has a reliability of +/- 3.6% at a 95% confidence level.*



In addition to collecting data from event attendees, Destination Analysts collected data from participants, event producers/organizers, sponsors/exhibitors/vendors, support services and media to provide a complete picture of economic impact generated by the Vans US Open of Surfing for the City of Huntington Beach.

The following online surveys were fielded to collect necessary spending data from each of these audiences:

- Survey of Participants (Athletes)
- Survey of Event Producers
- Survey of Sponsors
- Survey of Media & Support Services

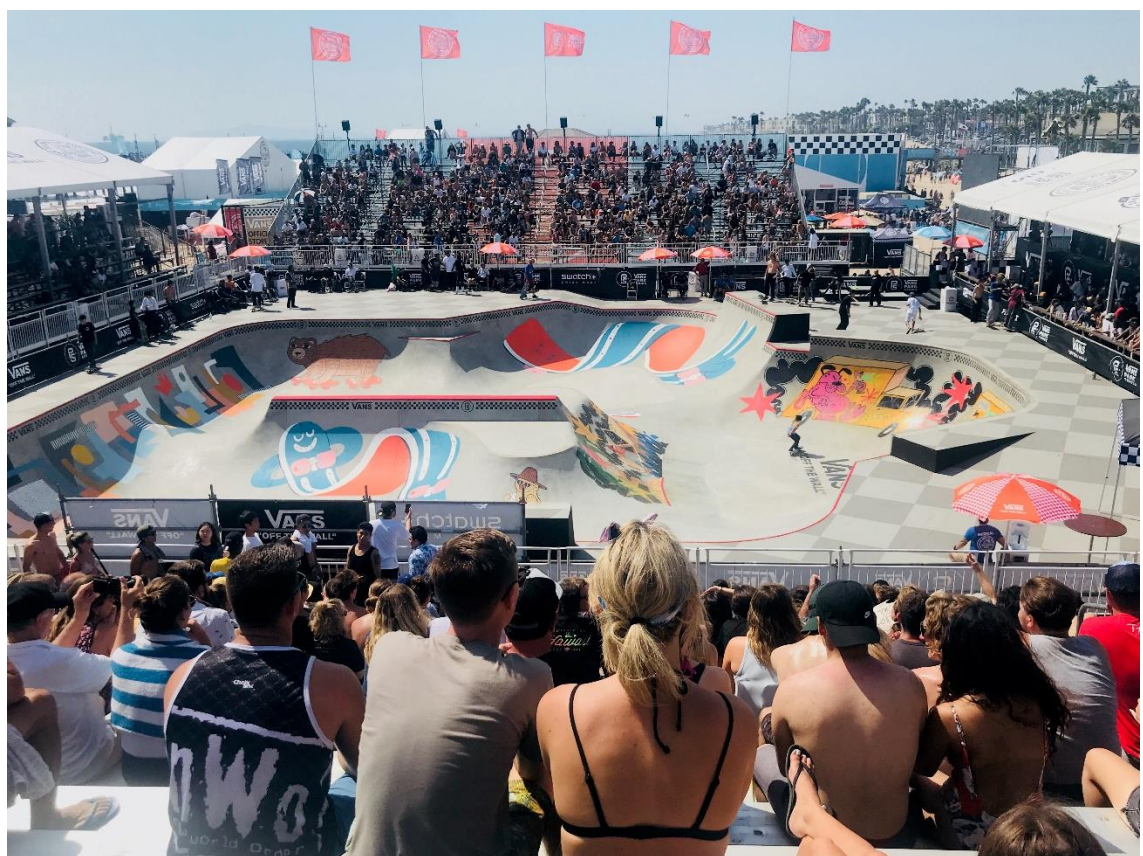


# About This Report

This report presents the top-line survey data collected from this survey. The economic impact estimates provided in this report are based on an event attendance estimate provided by the event organizer of 375,000.



IMPORTANT NOTE: Attendee spending is defined as spending in the city of Huntington Beach by 2018 Vans U.S. Open of Surfing attendees ***who reside outside Huntington Beach.*** Visiting event attendees include travelers from outside Huntington Beach visiting specifically to attend the 2018 Vans U.S. Open of Surfing. Spending by Huntington Beach residents related to the event is specifically excluded from this analysis, as it cannot be claimed as an injection of new spending into the local economy.



KEY DEFINITIONS: Throughout the report survey respondents are often referred to using the following key terms

**Visiting Event Attendee / Visitor / Non-local** – Attendees who reside OUTSIDE Huntington Beach

**Locals** – Attendees who reside within Huntington Beach



A background image of a surfer in a red and black wetsuit riding a wave. In the background, a pier structure is visible with a crowd of spectators. A large green sign on the pier reads "SIMPLE Mobile". To the left, a red sign partially reads "OFF THE WALL".

# EXECUTIVE SUMMARY



# THE VANS U.S. OPEN OF SURFING ATTENDEE PROFILE

# Executive Summary – Attendee Profile

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- **The Vans U.S. Open of Surfing attracted a significant proportion of visitors from outside Huntington Beach.** Six-in-ten attendees surveyed reside within the United States but outside Huntington beach while just under a third (32.0%) were local residents. Additionally, nearly one-in-ten respondents were international residents (8.0%).
- **The largest proportions of international visitors surveyed were from Canada (28.0%), the United Kingdom (22.4%) and Brazil (14.0%).** Additionally, just under one-in-ten international visitors surveyed were from Germany (7.8%).
- **One-in-five domestic visitors to the Vans U.S. Open of surfing were out-of-state residents.** In total, 79.3 percent of all visitors surveyed reside within the state of California while the remaining 20.7 percent were from out-of-state. The top out-of-state visitor markets include Nevada (3.4%), Arizona (3.0%) and Utah (2.5%).
- **At the MSA level, the top domestic visitor markets, outside Orange County (23.0%), were Los Angeles-Long Beach (22.4%), Riverside-San Bernardino-Ontario (16.3%) and San Diego (7.5%).** The top out-of-state visitor markets were Las Vegas (3.5%), Phoenix-Mesa (2.8%) and Salt Lake City-Ogden (1.6%).
- **Attendees who reside outside Huntington Beach were affluent.** The average reported annual household income of this group was \$96,850
- **The average visiting attendee was 36.7 years of age.**
- **Attendees who resides outside the city were ethnically diverse.** In total, 55.0 percent identified as Caucasian, 19.9 percent were Latino/Hispanic, 10.3 percent were Asian/Pacific Islander and 3.4 percent were Black/African American.
- **Just under half are married/partnered (46.6%) and a quarter (25.8%) have children under the age of 18.**



# SUMMARY OF THE HUNTINGTON BEACH TRIP



# Executive Summary – Summary of Huntington Beach Trip

- **Visitors who were not in Huntington Beach primarily to attend the event were primarily in the city on a vacation.** Nearly half of this group, 47.8 percent, said their primary reason for being in Huntington Beach was for a vacation. Meanwhile, 14.9 percent were visiting as part of a day-trip to the city.
- **A majority of visiting event attendees participated in shopping (74.2%), dining in restaurants (68.7%) and water activities (57.1%) during their time in Huntington Beach.** Visitors were presented with a list of activities and asked which they would participate in during their trip to the city. A quarter of respondents also participated in Huntington Beach's nightlife (25.2%) and/or attended a live performance in the city (24.5%).
- **The typical visiting attendee surveyed spent a total of \$930.65 per travel party within Huntington Beach over the course of their entire visit to the city.** The bulk of this was spent on retail purchases (\$366.13), local transportation, gas & parking (\$182.82) and lodging (\$128.21 across all visitors surveyed; hotel guests spent \$429.63 in total on their lodging while home share renters spent \$449.11, on average).
- **The average travel party was comprised of 2.8 people across all attendees surveyed.** Huntington Beach residents and attendees who live outside the city had similar travel party sizes averaging just under three people each (2.6 and 2.8, respectively).





# Executive Summary – Summary of Huntington Beach Trip

- **One-third of all visiting attendees surveyed stayed overnight within Huntington Beach (33.6%).** These overnight visitors spent an average of 4.1 days and 3.6 nights within the city on their trip. **In total, 61.5 percent of overnight visitors stayed in a Huntington Beach hotel while attending the Vans U.S. Open of Surfing.** Additionally 14.0 percent of this group stayed in a home share rental. **These paid lodging guests had an average of 2.7 people in their accommodations.**
- **A majority of Vans U.S. Open of Surfing attendees who reside outside Huntington Beach were repeat visitors to the city.** In total, 85.7 percent of this group were returning to Huntington Beach while 14.3 percent were in the city for the first-time.
- **Likelihood to return to Huntington Beach is high.** A majority of visitors surveyed said they “will certainly return” (68.1%) to Huntington Beach and an additional 23.1 percent said they are “very likely.”





# EVENT DETAILS AND SATISFACTION METRICS



# Executive Summary – Event Details & Satisfaction Metrics

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- **Nearly three-quarters of visitors surveyed were in Huntington Beach primarily to attend the Vans U.S. Open of Surfing.** In total, 74.0 percent of visiting attendees surveyed said their primary reason for being in Huntington Beach was this event. Nearly six-in-ten international visitors surveyed said the event was their primary reason for visiting the destination (57.1%).
- **The typical visiting Vans U.S. Open of Surfing attendee spent 2.6 days at the event.** Although 41.5 percent of visitors surveyed attended the event for just one day, 58.6 percent attended for two or more days.
- **Word of mouth (40.0%) and past attendance (29.5%) to the event were the top methods in which respondents had heard about the Vans U.S. Open of Surfing.** Additionally, over one-in-five of all attendees surveyed said they heard about the event through social media (22.8%). International visitors were the most likely group to have heard about the event through social media (49.3%) or by passing through (8.1%) compared to the other attendee segments.
- **The Vans U.S. Open of Surfing had an overwhelmingly positive impact on visitors' perception of Huntington Beach.** Nearly three-quarters of event attendees, who reside outside Huntington Beach, said their experience at the event “improved” (33.0%) or “greatly improved” (39.5%) their perception of the city.
- **The Vans U.S. Open of Surfing appears to provide a highly satisfactory attendee experience.** Nearly all attendees surveyed said they were “very satisfied” (37.8%) or “extremely satisfied” (54.3%) with their overall experience at the event.
- **In line with the high levels of attendee satisfaction, all respondents rated their likelihood to recommend the Vans U.S. Open of Surfing as a 9.4 out of 10.** In fact, nearly three-quarters of all attendees surveyed said they were “extremely likely” (10/10) to recommend the event to a friend (72.0%).

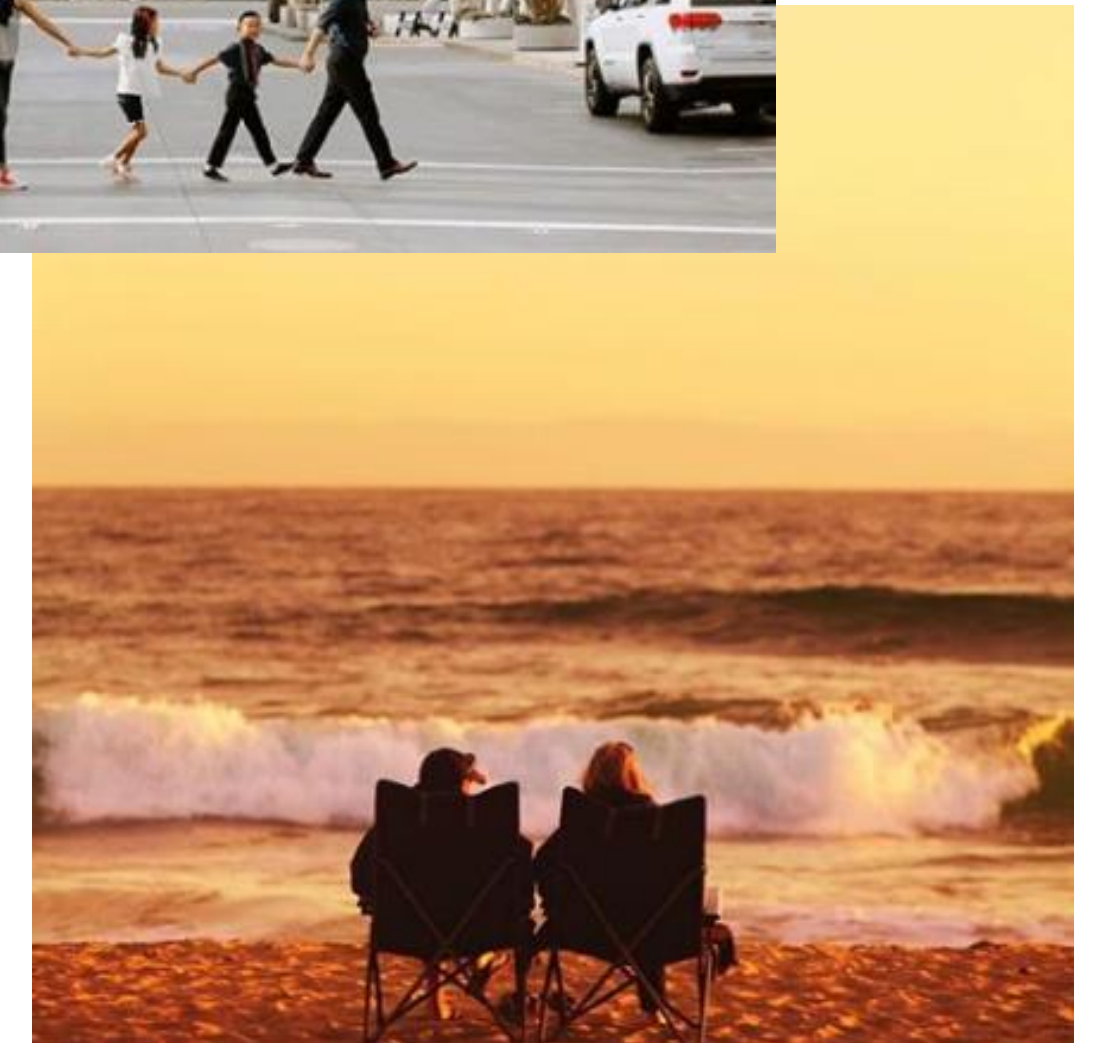


# COMPARISON OF EVENT ATTENDEES (WHO RESIDE OUTSIDE ORANGE COUNTY) TO THE TYPICAL HUNTINGTON BEACH VISITOR



# Executive Summary – Comparison of Event Attendees (who reside outside Orange County) to the Typical Huntington Beach Visitor

- Visiting event attendees were more likely to have stayed overnight within Huntington Beach compared to the typical visitor (41.3% vs. 22.4%, respectively).
- Attendees were also more likely to have been first-time visitors to Huntington Beach (17.1% vs. 8% of all visitors surveyed in 2015).
- Event attendees were less likely to be traveling with children compared to Huntington Beach's average visitor (33.0% vs. 42%)
- Vans U.S. Open of Surfing attendees were also slightly older with an average age of 36.7 (vs. 33) and are more affluent. The average household income of event attendees was \$97,003 (vs. \$71,800).
- The length of stay amongst overnight event attendees was shorter compared to the average Huntington Beach overnight visitor (3.6 nights vs. 4.4 nights).
- However, overnight event attendees were more likely to have stayed in a Huntington Beach hotel at 61.0 percent compared to a third of overnight visitors surveyed in 2015 (33%).





# COMPARISON OF FINDINGS: U.S. OPEN OF SURFING 2018 AND 2010



# Executive Summary – Comparison of U.S. Open of Surfing 2018 & 2010

- **Direct total spending generated by USOS is up significantly in 2018.** This year's event generated \$55.3 million compared to \$21.5 million in 2010.
- **International attendance has increased compared to 2010.** In 2018, just under one-in-ten attendees were international residents (8.0%), up from 3 percent in 2010.
- **The 2018 event attracted more out-of-state visitors.** In total, 20.7 percent of domestic visiting attendees surveyed reside outside California--up from 9 percent in 2010.
- **The proportion of visiting attendees who said the USOS was their primary purpose for visiting Huntington Beach increased in 2018.** Three quarters of respondents (74.0%) were in the destination primarily to attend the USOS compared to 69 percent in 2010.
- **Day trip and overnight visitor proportions were similar between the two periods of study with two thirds of visiting attendees only spending the day in the destination (66.4% in 2018 and 66% in 2010).**
- **However, amongst overnight visitors the proportion who stayed in a Huntington Beach hotel increased in 2018.** In total 61.5 percent of overnight visitors surveyed stayed in a hotel within the city, up from 54 percent in 2010.
- **Participation in key activities within the destination also increased in 2018.** Visiting USOS attendees surveyed were more likely to shop (74.2% vs 49% in 2010) and dine in restaurants (68.7% vs. 57%) during their time in Huntington Beach.





A background image of a surfing event. A surfer in a red shirt is riding a wave. In the background, a crowd of spectators is gathered on a pier or boardwalk. A large green sign with the text "SIMPLE Mobile" is visible. To the left, a sign says "OFF THE WALL".

# EVENT ECONOMIC IMPACT ANALYSIS



# Visitor Industry Economic Impact Calculation

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The economic impact results presented in this report were developed using Destination Analysts' proprietary economic impact model for destinations. This model produces event economic impact estimates and uses data inputs from multiple sources. These sources include proprietary research (1-2 below) commissioned by Visit Huntington Beach, and a variety of secondary data sources. Five main sources are used:

- 1) Vans U.S. Open of Surfing Attendee Intercept Survey
- 2) Online survey of Event Organizers, Sponsors, Event Athletes and Media/Support Services
- 3) Data from federal, state and city government statistical agencies
- 4) STR citywide hotel inventory and occupancy estimates
- 5) Implan multipliers and jobs supported estimates

The model used here is based on an industry-standard modeling approach for estimating ***direct incremental visitor spending*** in the destination. This is defined as all spending by visiting attendees to Huntington Beach who were in the destination primarily to attend the Vans U.S. Open of Surfing. In short, the model uses various sources to make detailed estimates of visitor volume and visitor days spent in the destination. To these estimates are applied estimates of per day spending developed directly from the survey data collected for this study. Implan multipliers were then used to estimate the overall economic impact of tourism to the local economy.

The model also estimates additional metrics related to the visitor industry's economic impact to the community. These are tax revenues generated for Huntington Beach, and jobs supported by the industry,



# Economic Impact: Definitions

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The following key definitions are used in this section of the report.

***Incremental Visitor:*** A person who lives outside Huntington Beach and was visiting the city primarily to attend the Vans U.S. Open of Surfing.

***Total direct visitor spending:*** The injection of money into the local economy that takes place when an incremental visitor purchases any good or service inside Huntington Beach.

***Economic impact of the visitor industry:*** The total change in economic activity in Huntington Beach generated by incremental visitors' direct spending in Huntington Beach. This includes direct visitor spending as well its ***induced*** and ***indirect*** effects in the local economy.

***Tax revenues generated:*** Tax revenues flowing to Huntington Beach's city government coffers as a result of direct visitor spending.

***Jobs supported:*** The number of jobs supported by direct visitor spending in Huntington Beach. These jobs may or may not be physically located in the destination and also may not be in jobs traditionally identified as tourist jobs. For example, restaurant spending supports many types of jobs such as delivery persons and linen cleaners. We may not think of these as tourism jobs, but the industry nevertheless supports them.





# Economic Impact Key Findings

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A brief summary of economic impact statistics generated in this study follows:

- ❑ **Direct Visitor Spending.** Visitors spent nearly \$49.5 million in Huntington Beach as part of their trip to attend the Vans U.S. Open of Surfing. In addition to the spending from the event organizer, event athletes/participants, sponsors and media/support services the estimated total spending in Huntington Beach was \$55.3 million.
- ❑ **Economic Impact.** Using an IMPLAN economic impact model, it is estimated that the overall economic impact to Huntington Beach of the visitor industry was \$96.4 million. This figure includes the indirect and induced effects of visitor spending in Huntington Beach.
- ❑ **Employment impact.** Visitor spending supports jobs. In total, 998 jobs are supported by direct visitor spending in Huntington Beach.
- ❑ **Tax generation.** These visitors' spending generated significant tax revenues for the city, totaling an estimated \$3.3 million. These taxes include the transient occupancy tax, property taxes paid by the lodging industry and retail sales taxes.



# Economic Impact Analysis

The Vans U.S. Open of Surfing generated approximately \$55.3 million in economic impact to the city of Huntington Beach, based on an estimated 375,000 attendees to the multi-day event.

More than two thirds of attendees (68.0%) were from outside Huntington Beach (54.2% were from outside Orange County) and the majority (74.0%) said they came to the city specifically for the event.

Incremental visitors (those coming specifically for the event) are estimated to have purchased 25,283 room nights in the city (20,913 hotel room nights and 4,370 home share/vacation rental room nights).

Total Economic Impact (Direct Visitor, Sponsor, Athlete/Participant and Organizer Spending in Huntington Beach)		\$55,312,422	
	Visiting Attendees	Organizer/Sponsor/Media /Support Services	Athletes/ Participants
Economic Impact	\$49,498,204	\$4,223,336	\$1,590,881
Incremental Visitors	118,193		
Incremental Visitor Days	555,509		

Huntington Beach Hotel Impact Statistics	Total Impact
Incremental room nights generated	20,913
Huntington Beach Home Sharing/Vacation Rental	Total Impact
Incremental room nights generated	4,370
Total Visitor Nights Generated	25,283



# Economic Impact Analysis – 2010 vs. 2018

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The economic impact for the 2018 Vans U.S. Open of Surfing was significantly higher compared to findings in 2010. A number of factors could be attributing to this growth:

- A. Increased visitation from out-of-state and international travelers:** In 2018, just under one-in-ten attendees were international residents (8.0%), up from 3 percent in 2010. Additionally, 20.7 percent of domestic visiting attendees surveyed reside outside California--up from 9 percent in 2010.
- B. Increased in-market spending on activities in Huntington Beach:** Visiting USOS attendees surveyed were more likely to shop (74.2% vs 49% in 2010) and dine in restaurants (68.7% vs. 57%) during their time in Huntington Beach.
- C. Increased hotel inventory:** In 2018 the city of Huntington Beach had a total of 2,468 available hotel rooms while in 2011 (data for 2010 is not available) the city had 1,945.
- D. Addition of vacation rental by owners impact/ home share:** With the addition of peer-to-peer vacation rentals in Huntington Beach the city is able to accommodate more overnight visitors who spend more in-market than day trippers. (In 2018 41.3% of visiting attendees stayed overnight in Huntington Beach vs. 22.4% in 2010).
- E. Increase in ADR**
- F. Change in consumer price index/inflation & dollar valuation**



A background image showing a surfer in a red wetsuit riding a wave. In the background, a crowd of people is gathered on a pier or boardwalk, watching the event. A sign for 'SIMPLE Mobile' is visible on the pier. The text 'OFF THE WALL' is partially visible on the left. The overall scene is a coastal surfing event.

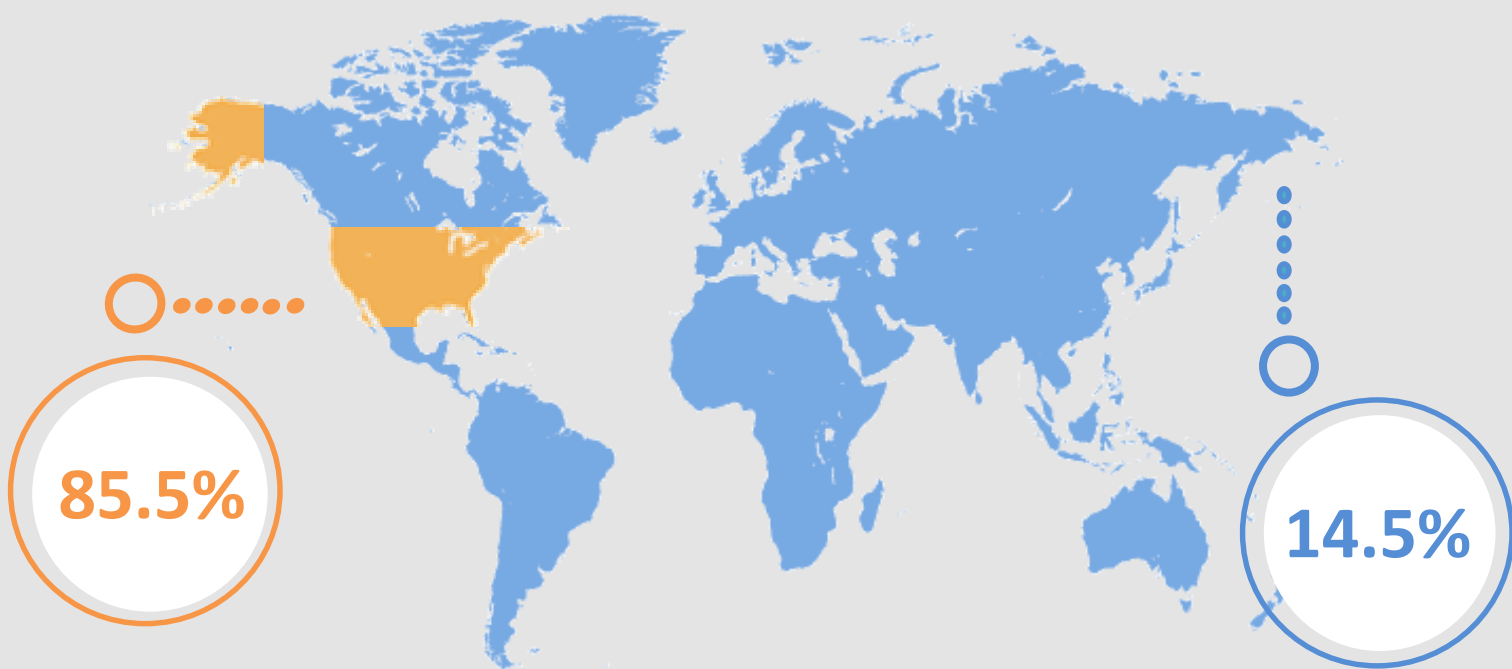
# INFOGRAPHIC SUMMARY OF USOS ATTENDEES WHO RESIDE OUTSIDE ORANGE COUNTY



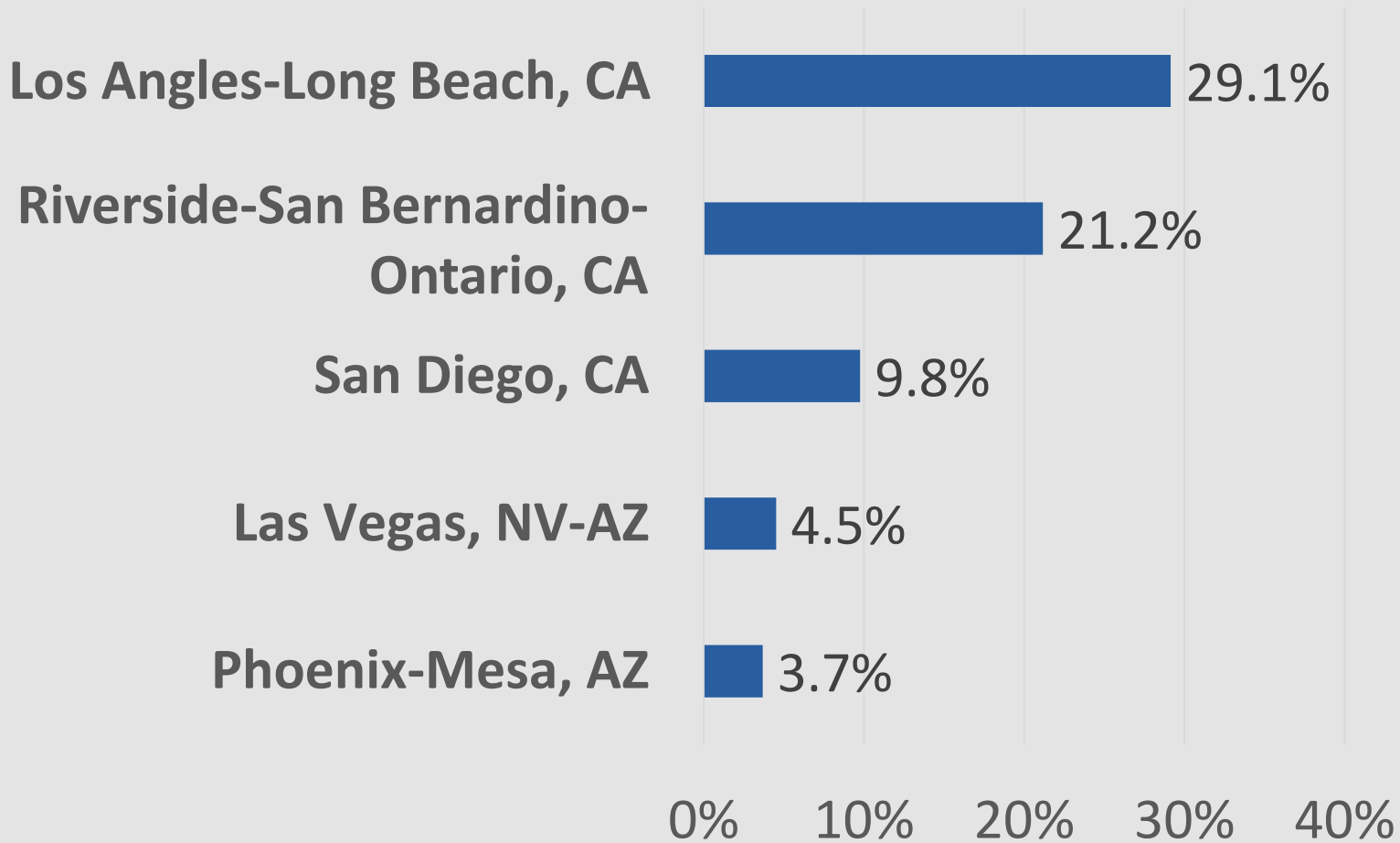
# PROFILE OF 2018 USOS ATTENDEES WHO RESIDE OUTSIDE ORANGE COUNTY

Visit Huntington Beach – 2018 Vans U.S. Open of Surfing Economic Impact Study – Final Report of Findings

## International vs. Domestic Attendees



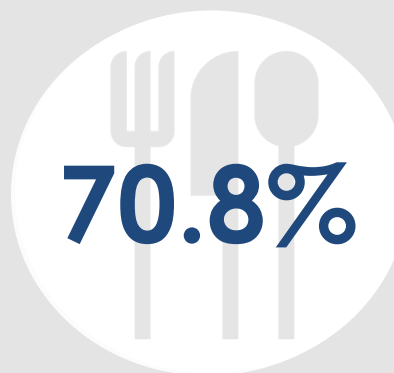
## Point of Origin: Top Domestic Markets



## Top Activities



Shopping



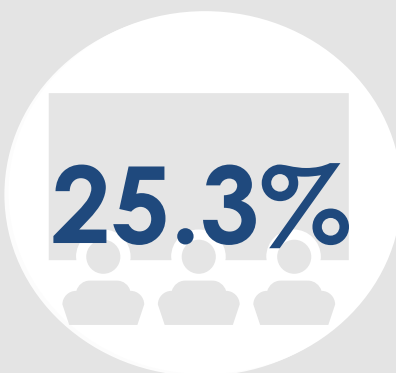
Dining in Restaurants



Water Activity



Bars or Nightlife

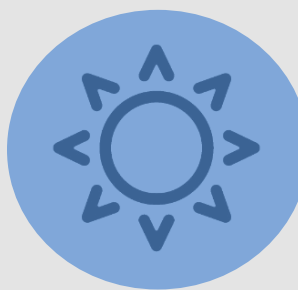


Attend a Live Performance



Bike Rental

## Key Trip Details

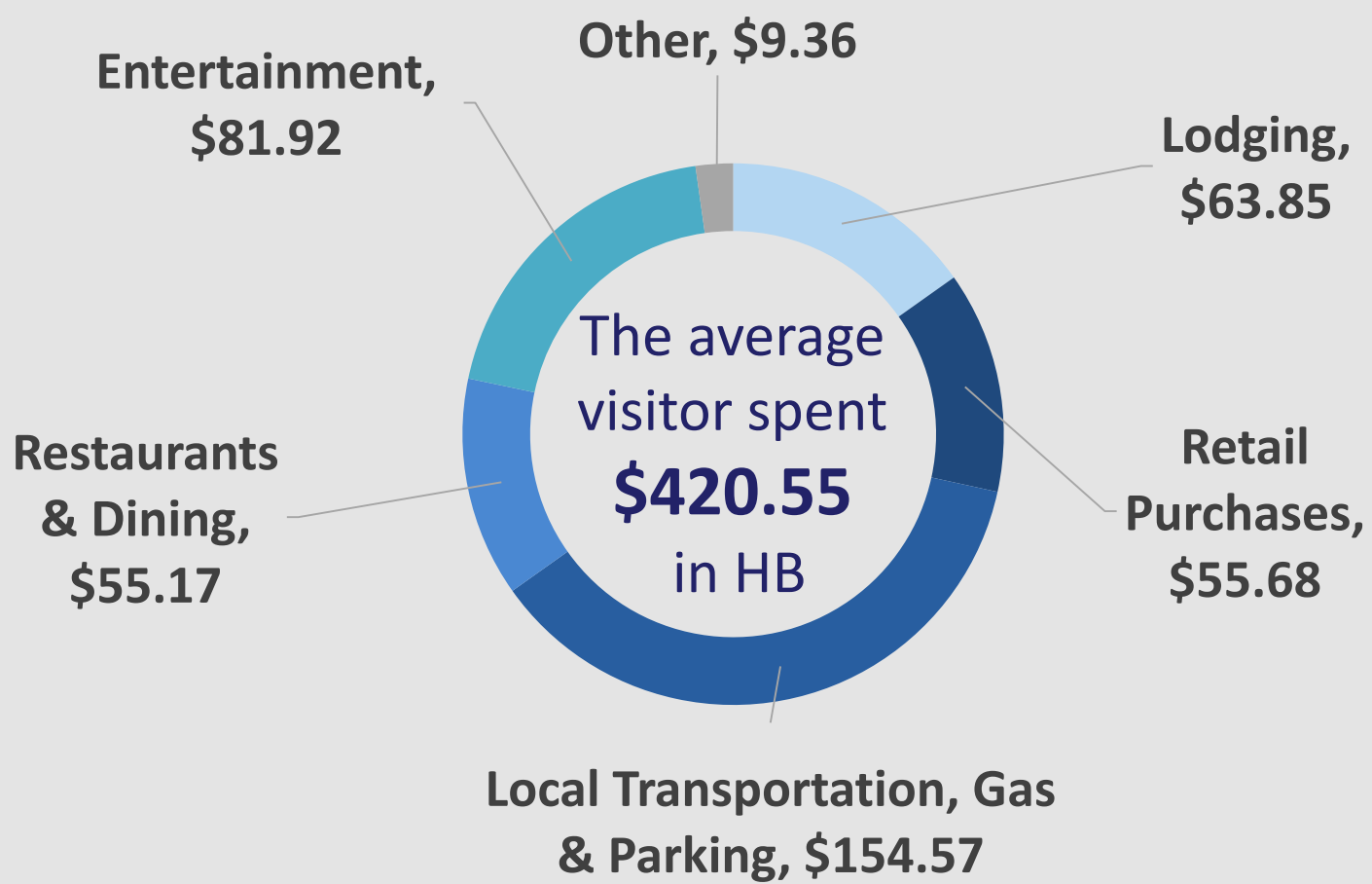


The average attendee from outside Orange County spent **4.1 days and 3.6 nights** in Huntington Beach



The average visiting travel party consisted of **2.9 people & 33.0% had children under 18 in their party**

## Total In-Market Spending Per Person

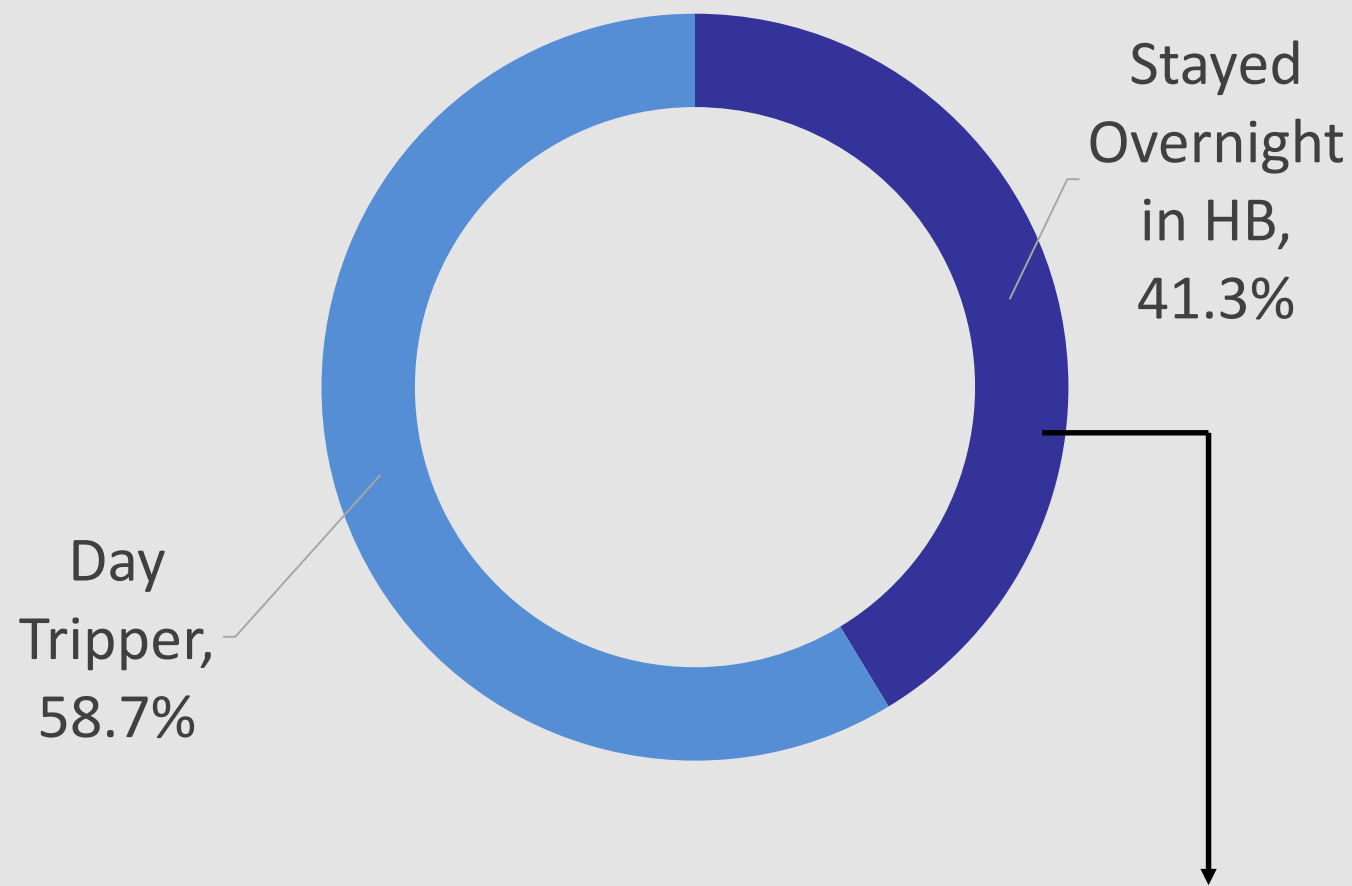




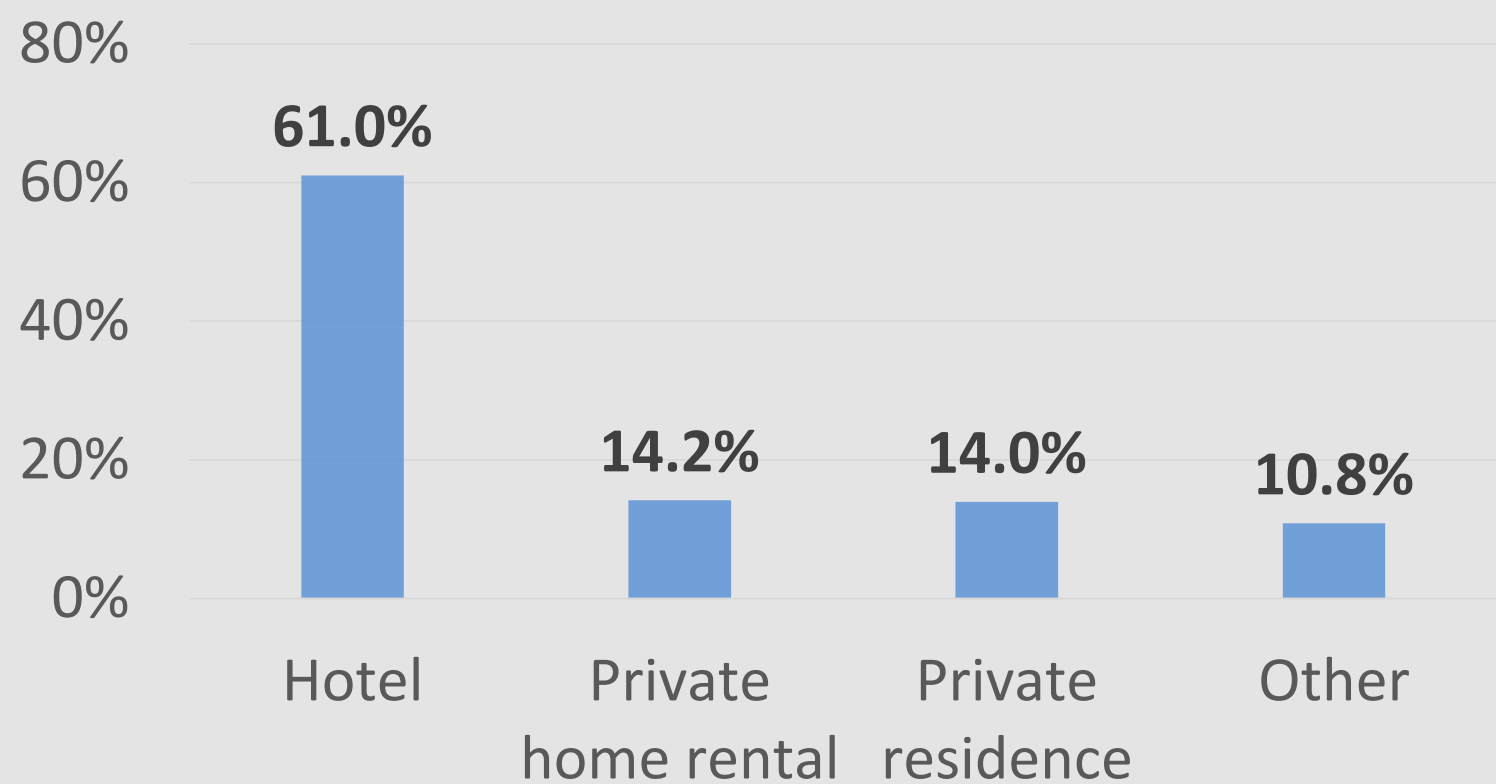
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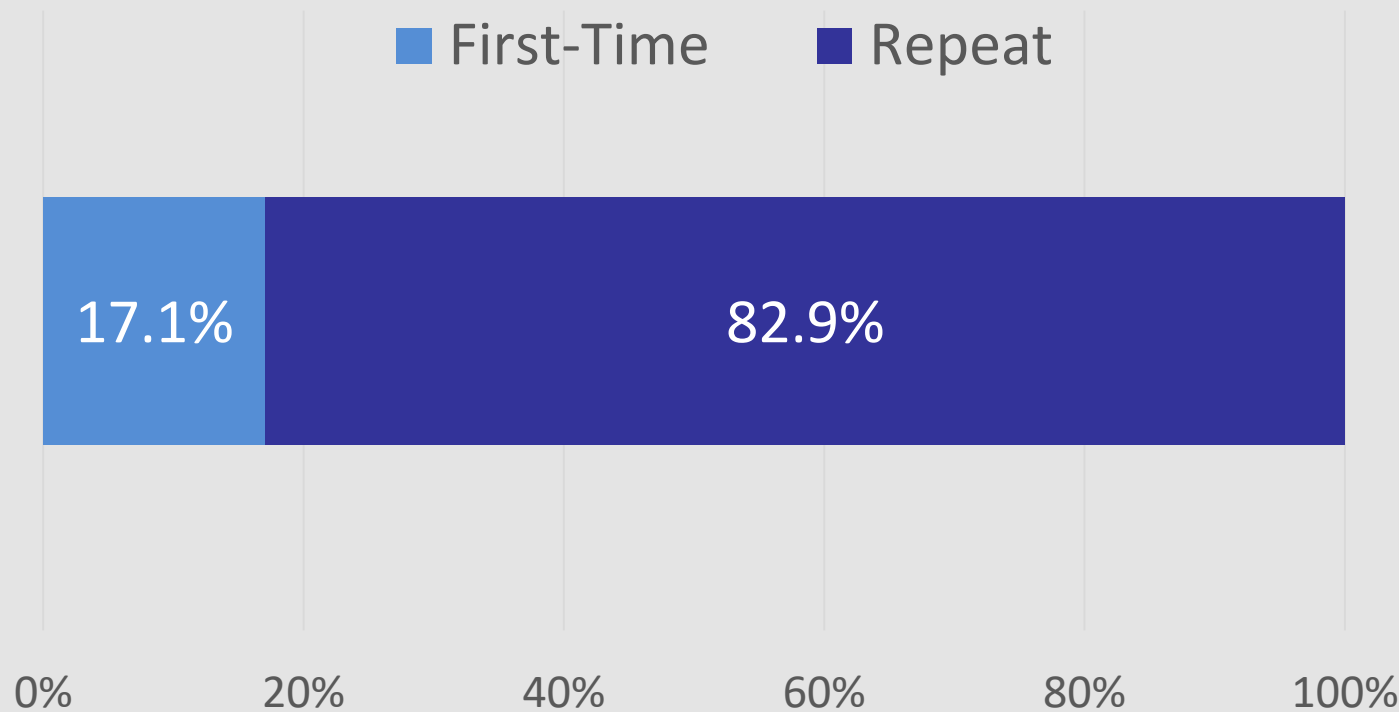
## Overnight Stay in Huntington Beach



## Place of Stay in Huntington Beach



## First-Time Visitor vs. Repeat Visitor



## Likelihood to Return to Huntington Beach



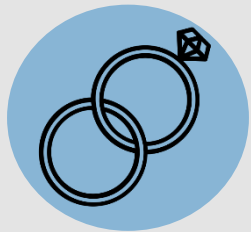
## Attendee Demographics



Male – 53.3%  
Female – 46.7%



Caucasian - 54.3%  
Latino-Hispanic - 20.8%  
Asian-Pacific Islander - 8.7%  
African-American/Black - 4.0%



Single—50.2%  
Married/Partnered—47.7%  
26.8% Have Children Under 18



Mean household income – \$97,003



Mean age – 36.7



Heterosexual – 89.9%  
LGBTQ – 2.7%



A background image of a surfer in a red shirt and black pants riding a wave. In the background, a pier with spectators is visible. A large green sign with the text "SIMPLE Mobile" is prominent on the pier. To the left, a red sign partially reads "OFF THE WALL".

# DETAILED FINDINGS



# ABOUT THIS SECTION

In the remainder of this report, data from the survey findings is presented as follows:

- The aggregate total is shown in the chart on the left
- On the right, a data table shows the findings broken out by type of visitor:
  1. Day Trip—Visitors who did not stay overnight in Huntington Beach
  2. All Overnight—Visitors who stayed overnight in Huntington Beach in either paid or private accommodations
  3. Hotel—Visitors who stayed overnight at a Huntington Beach hotel during their trip
  4. Home Sharing—Visitors who stayed overnight at a Huntington Beach home sharing rental or vacation home during their trip
  5. VFR—Visitors who stayed overnight in a private residence of a friend or family member in Huntington Beach
  6. International—Visitors who reside outside the U.S.

## ***Key Definitions:***

**Visiting Event Attendee / Visitor / Non-local** – Attendees who reside OUTSIDE Huntington Beach

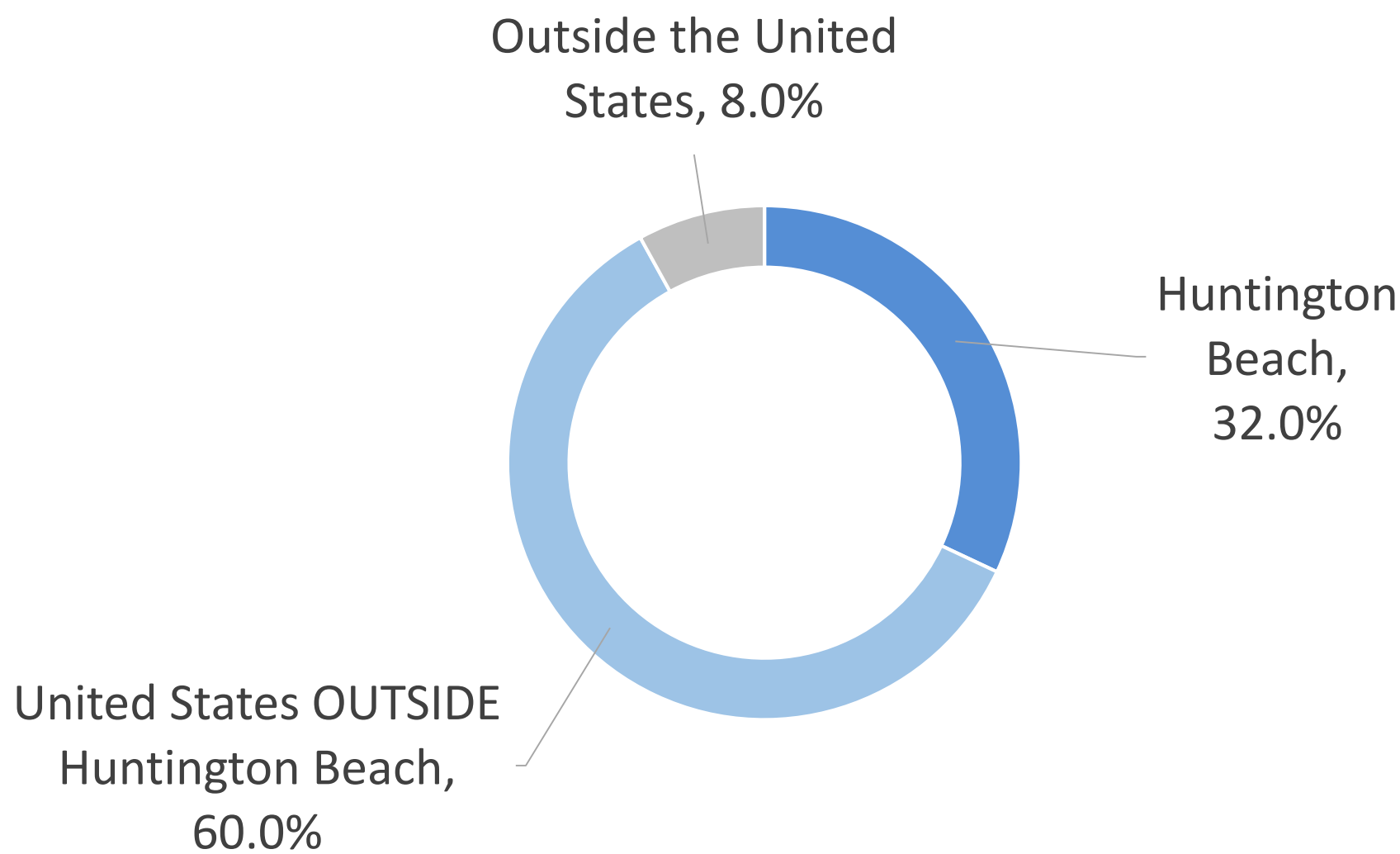
**Locals** – Attendees who reside within Huntington Beach



# Point of Origin

The Vans U.S. Open of Surfing attracted a significant proportion of visitors from outside Huntington Beach. Six-in-ten attendees surveyed reside within the United States but outside Huntington beach (60.0%), while just under a third (32.0%) were local residents. Additionally, nearly one-in-ten respondents were international residents (8.0%).

Figure 1: Point of Origin



Detail by Type of Visitor

	Day Trip	All Overnight	Hotel	Home sharing rental or vacation home	VFR
United States OUTSIDE Huntington Beach	90.0%	82.2%	80.6%	80.1%	92.8%
Outside the United States	8.7%	17.8%	19.4%	19.9%	7.2%
Base	471	116	59	10	31

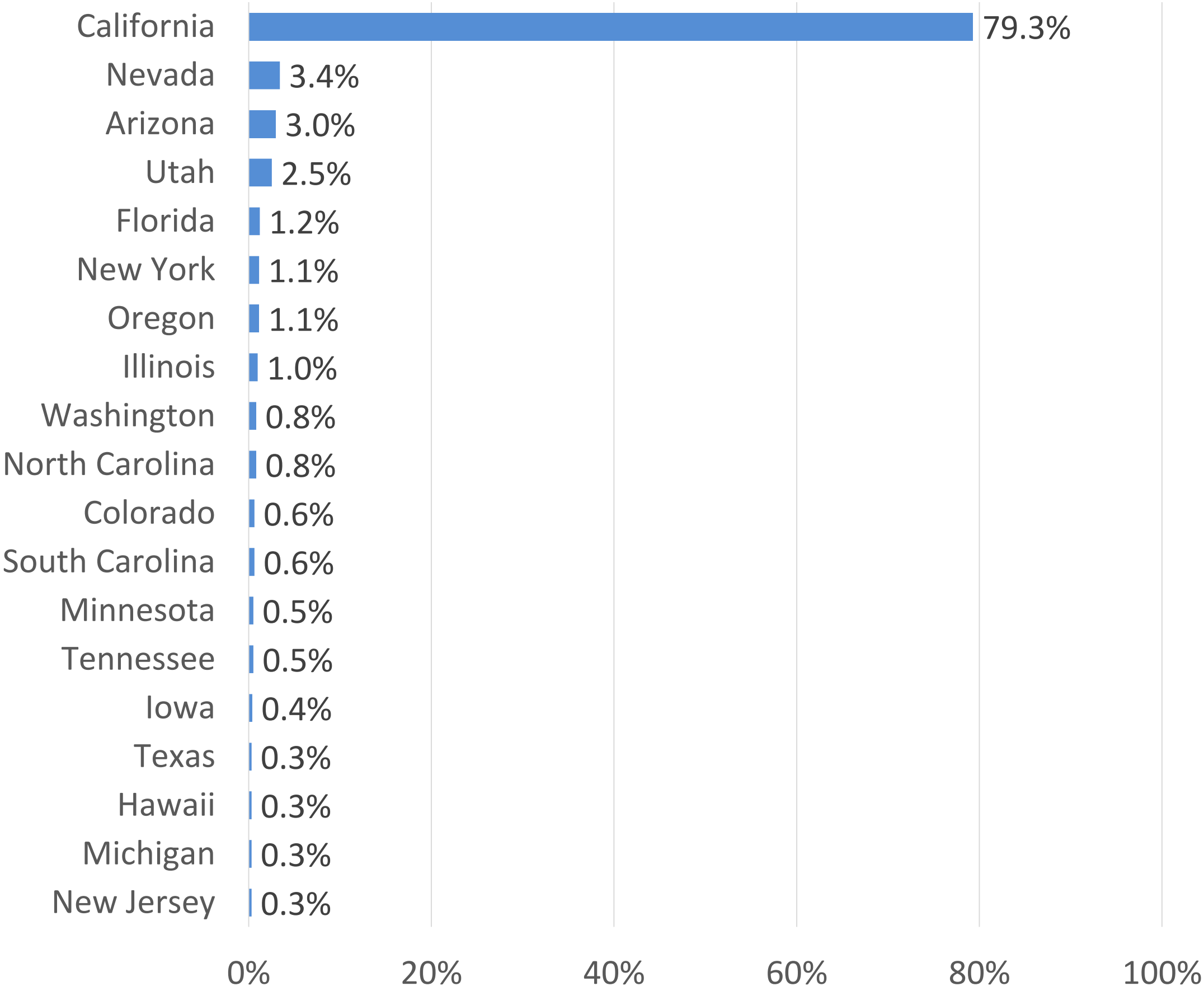
Question: Where is your primary residence? Base: All respondents. 745 responses.



# State of Residence

**One-in-five domestic visitors to the Vans U.S. Open of surfing were out-of-state residents.** In total, 79.3 percent of all visitors surveyed reside within the state of California while the remaining 20.7 percent were from out-of-state. The top out-of-state visitor markets include Nevada (3.4%), Arizona (3.0%) and Utah (2.5%).

Figure 2: State of Residence

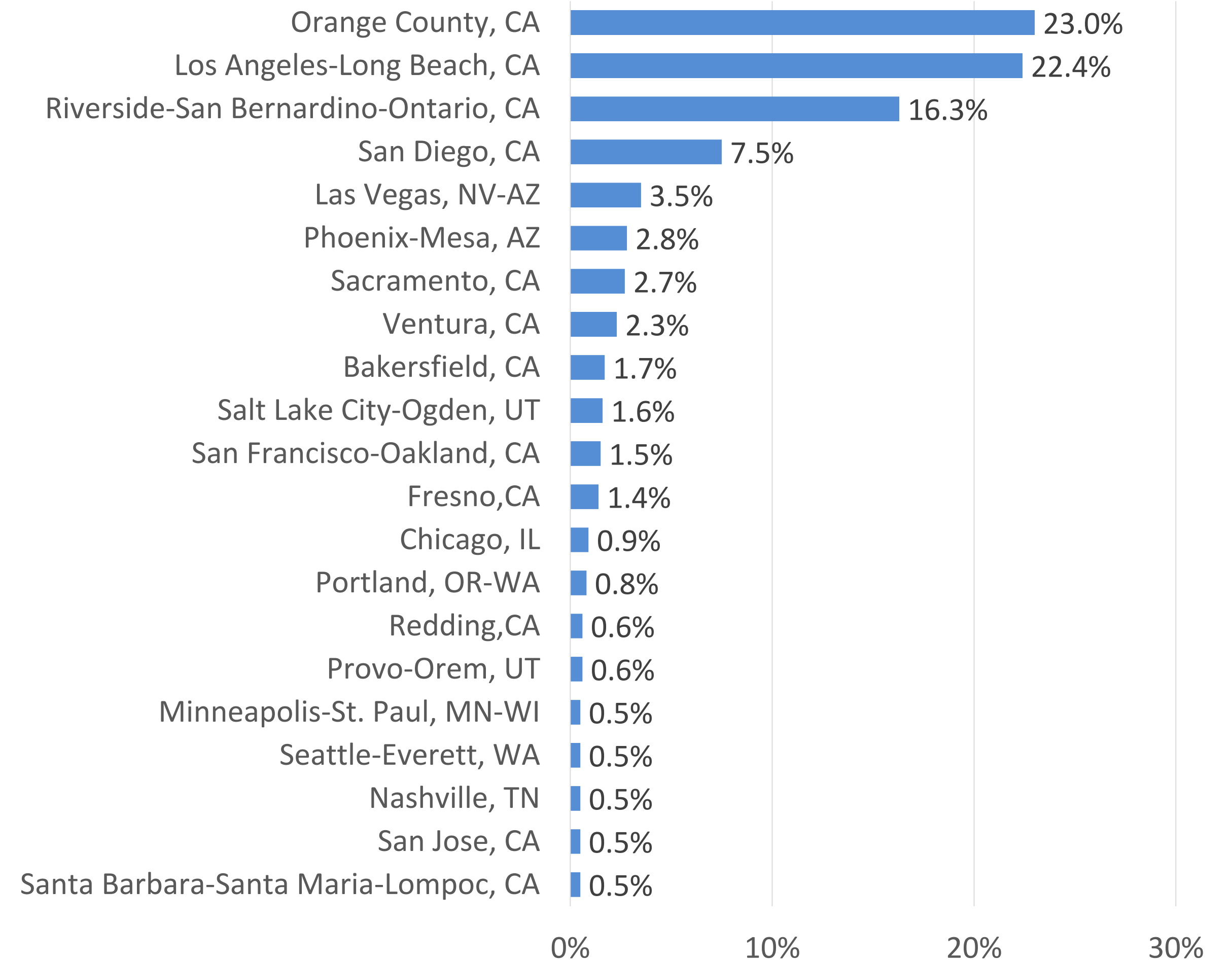


Question: What is your zip code? Base: Domestic visitors. 515 responses.



The top domestic visitor markets observed in the sample, outside Orange County (23.0%), include Los Angeles-Long Beach (22.4%), Riverside-San Bernardino-Ontario (16.3%) and San Diego (7.5%). The top out-of-state visitor markets were Las Vegas (3.5%), Phoenix-Mesa (2.8%) and Salt Lake City-Ogden (1.6%).

Figure 3: MSA



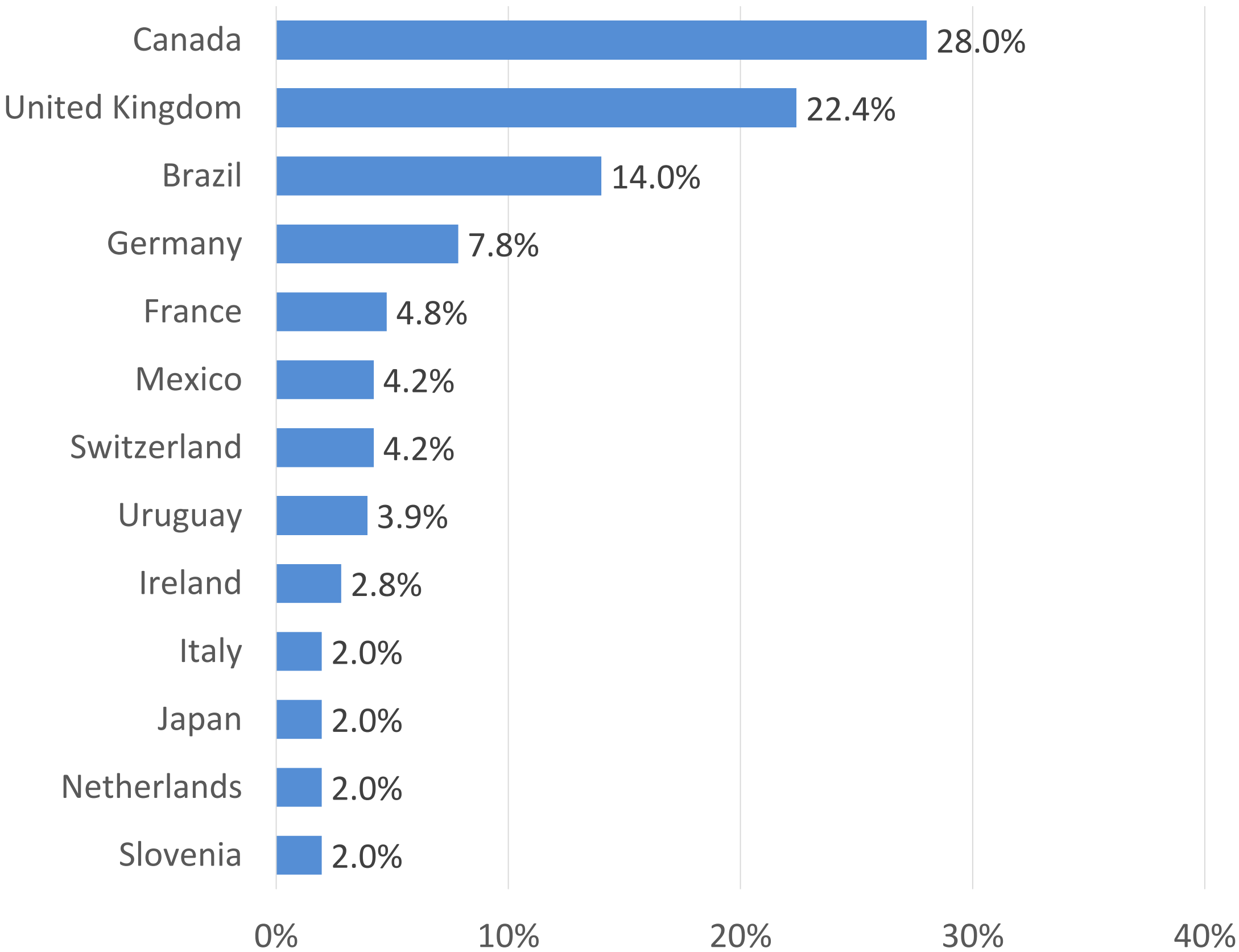
Question: What is your zip code? Base: Domestic visitors. 505 responses.

# International Visitors: Country of Residence

The largest proportions of international visitors surveyed were from Canada (28.0%), the United Kingdom (22.4%) and Brazil (14.0%). Additionally, just under one-in-ten international visitors surveyed were from Germany (7.8%).

*Please note the small sample size. This data should be considered informational and not directional.*

Figure 4: International Visitors—Country of Residence



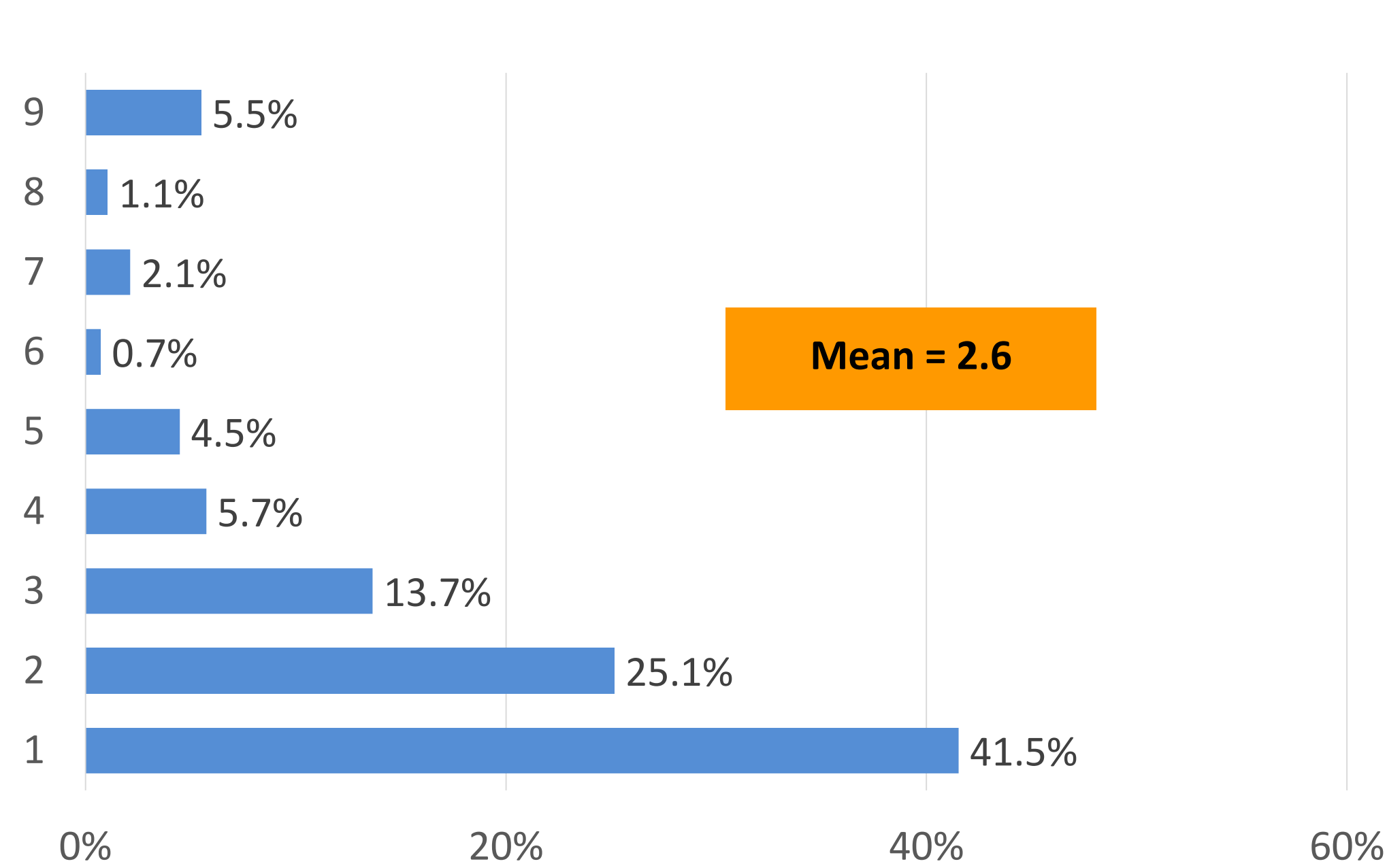
Question: In which country do you reside? Base: International visitors. 39 responses.



# Length of Attendance

The typical visiting Vans U.S. Open of Surfing attendee spent 2.6 days at the event. Although 41.5 percent of visitors surveyed attended the event for just one day, 58.6 percent attended for two or more days.

Figure 5: Length of Attendance



Detail by Type of Visitor

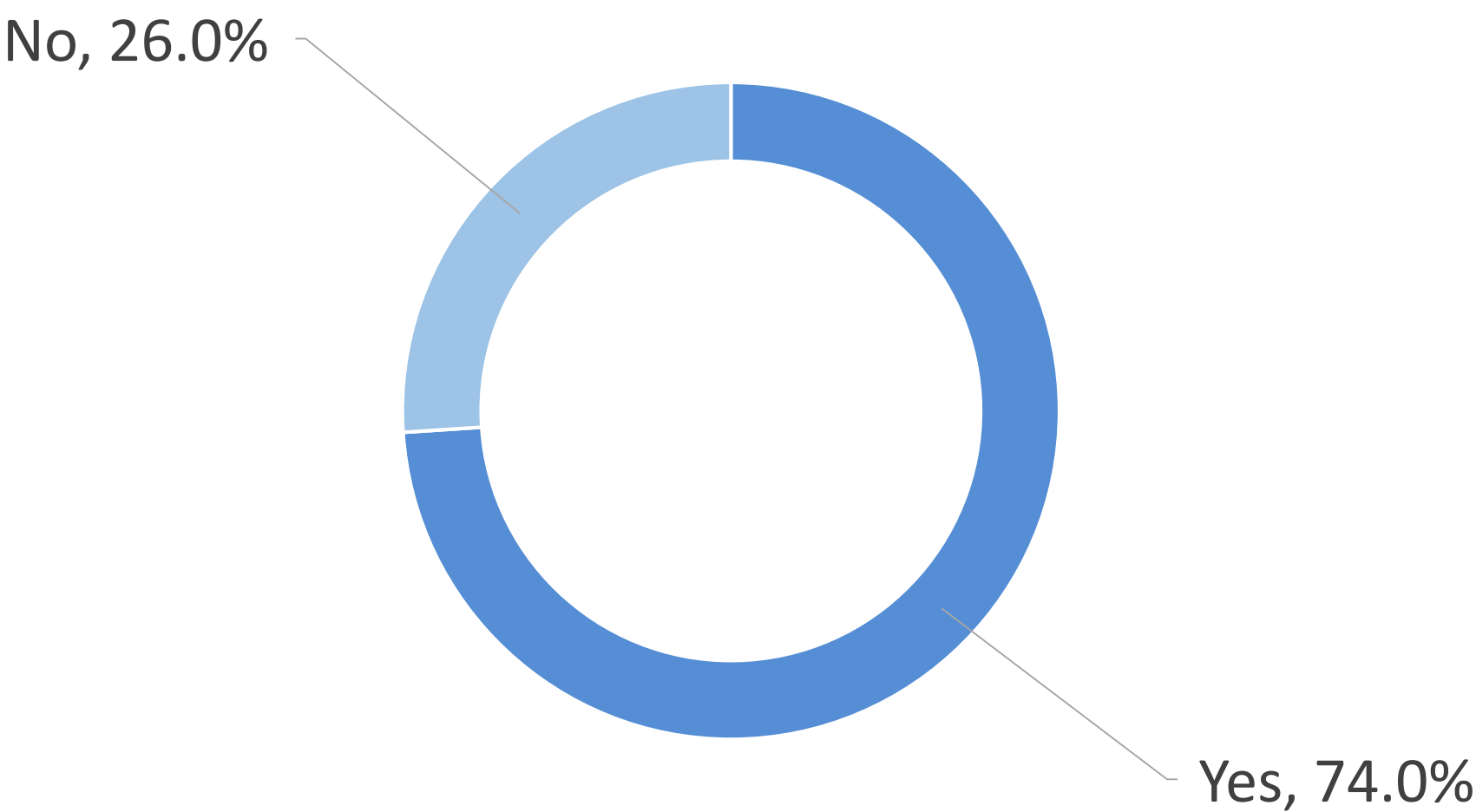
	Day Trip	All Overnight	Hotel	Homesharing rental or vacation home	VFR	International
9	3.2%	10.2%	5.8%	11.3%	4.3%	4.0%
8	0.0%	3.1%	3.2%	0.0%	8.6%	0.0%
7	0.8%	4.7%	5.0%	0.0%	4.3%	4.3%
6	0.2%	1.8%	1.9%	0.0%	4.3%	0.0%
5	3.1%	7.2%	6.5%	9.9%	2.2%	4.0%
4	5.8%	5.8%	1.3%	18.4%	12.9%	6.0%
3	11.9%	16.8%	22.7%	9.2%	6.5%	14.9%
2	25.8%	24.4%	30.8%	9.2%	32.4%	20.3%
1	49.2%	26.0%	22.7%	41.8%	24.5%	46.6%
Mean	2.1	3.5	3.2	3.1	3.4	2.4
Base	463	116	59	10	31	38

Question: How many total days will you be attending the Vans US Open of Surfing in Huntington Beach? Base: Attendees who reside outside Huntington Beach. 583 responses.

# Vans U.S. Open of Surfing was Primary Reason for HB Visit

Nearly three-quarters of visitors surveyed were in Huntington Beach primarily to attend the Vans U.S. Open of Surfing. In total, 74.0 percent of visiting attendees surveyed said their primary reason for being in Huntington Beach was this event. Nearly six-in-ten international visitors surveyed said the event was their primary reason for visiting the destination (57.1%).

Figure 6: Event was Primary Reason for Huntington Beach Visit



Detail by Type of Visitor

	Day Trip	All Overnight	Hotel	Home sharing rental or vacation home	VFR	International
Yes	80.0%	62.4%	67.6%	41.1%	47.5%	57.1%
No	20.0%	37.6%	32.4%	58.9%	52.5%	42.9%
Base	469	115	58	10	31	39

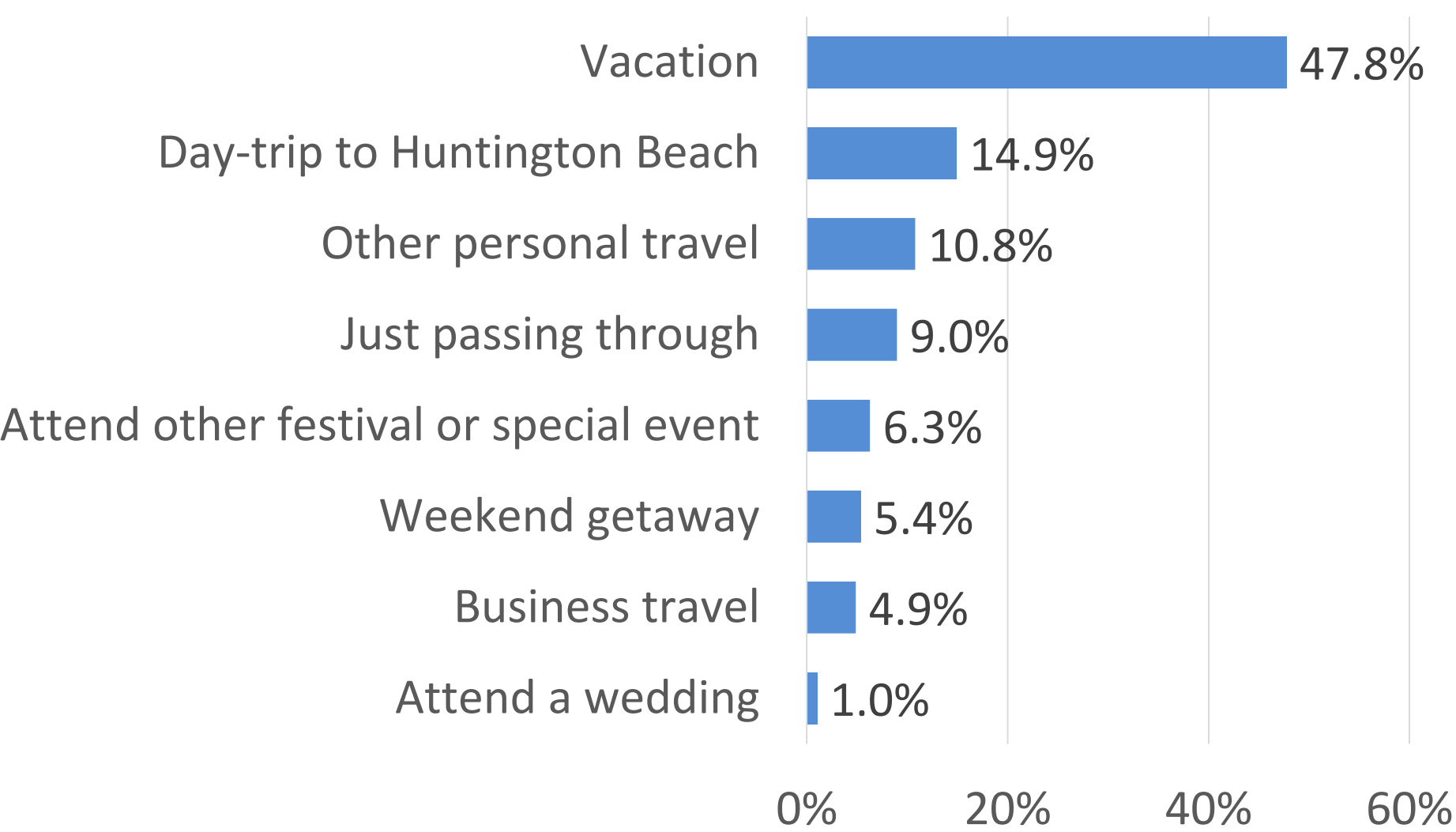
Question: Is the Vans US Open of Surfing the PRIMARY reason for this visit to Huntington Beach?  
Base: Attendees who reside outside Huntington Beach. 587 responses.



# Primary Reason for Visit

Visitors who were not in Huntington Beach primarily to attend the event were primarily in the city on a vacation. Nearly half of this group, 47.8 percent, said their primary reason for being in Huntington Beach was for a vacation. Meanwhile, 14.9 percent were visiting as part of a day-trip to the city.

Figure 7: Primary Reason for Visit



Detail by Type of Visitor

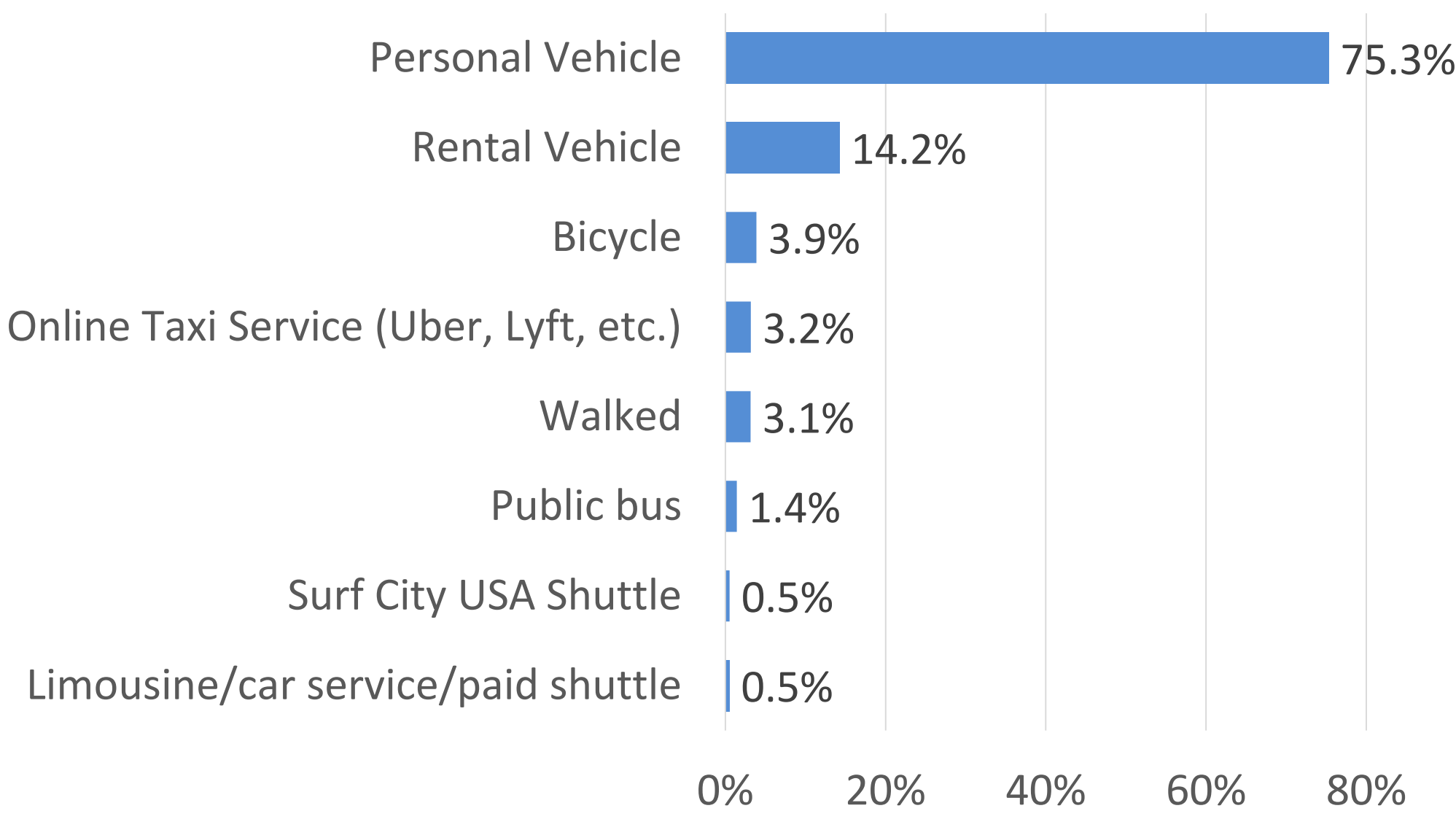
	Day Trip	All Overnight	Hotel	Home sharing rental or vacation home	VFR	Inter-national
Vacation	30.7%	66.3%	63.5%	84.3%	41.1%	84.3%
Day-trip to HB	28.6%	0.0%	0.0%	0.0%	0.0%	4.6%
Other personal travel	15.3%	6.3%	0.0%	0.0%	32.9%	0.0%
Just passing through	10.2%	7.9%	4.1%	15.7%	12.3%	0.0%
Weekend getaway	5.6%	4.2%	8.1%	0.0%	0.0%	0.0%
Attend other festival or special event	6.4%	6.3%	12.2%	0.0%	0.0%	0.0%
Business travel	3.1%	6.8%	8.1%	0.0%	13.7%	11.1%
Attend a wedding	0.0%	2.1%	4.1%	0.0%	0.0%	0.0%
Base	87	47	19	6	17	16

Question: What IS your primary reason for visiting Huntington Beach? Base: Respondents who said the event was NOT their primary reason for being in Huntington Beach. 136 responses.

# Method of Arrival to the Event

Visiting event attendees primarily arrived to the Vans U.S. Open of Surfing by personal vehicle (75.3%). Additionally 14.2 percent arrived via rental vehicle, 3.9 percent arrived by bicycle and 3.2 percent used an online taxi service. International visitors were the most likely group to have used an online taxi service (10.4%) to arrive at the event.

Figure 8: Method of Arrival to the Event



Detail by Type of Visitor

	Day Trip	All Overnight	Hotel	Home sharing rental or vacation home	VFR	Inter-national
Personal Vehicle	81.0%	63.0%	64.0%	43.3%	71.2%	32.2%
Rental Vehicle	9.4%	23.5%	21.5%	47.5%	11.5%	55.5%
Bicycle	3.6%	4.4%	3.2%	0.0%	8.6%	0.0%
Online Taxi Service	2.9%	3.7%	6.1%	0.0%	0.0%	10.4%
Walked	1.5%	7.2%	7.1%	9.2%	10.8%	0.0%
Public bus	2.1%	0.0%	0.0%	0.0%	0.0%	2.0%
Surf City USA Shuttle	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Limousine/car service/paid shuttle	0.0%	1.5%	2.4%	0.0%	0.0%	4.2%
Base	471	116	59	10	31	39

Question: Which modes of transportation did you use to get to the Vans US Open of Surfing? Base: Attendees who reside outside Huntington Beach. 587 responses.

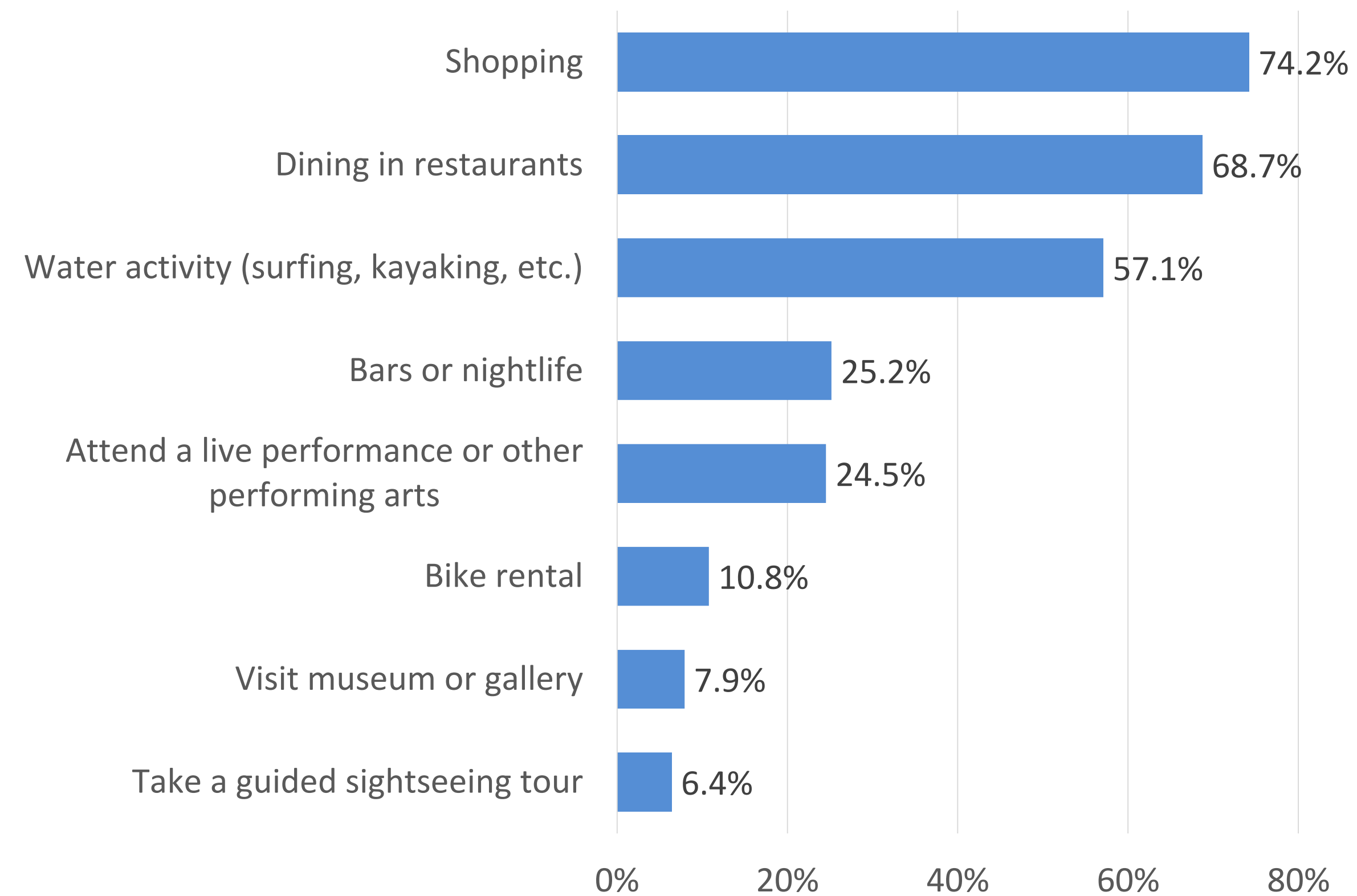


# Activities in Huntington Beach

A majority of visiting event attendees participated in shopping (74.2%), dining in restaurants (68.7%) and water activities (57.1%) during their time in Huntington Beach. Visitors were presented with a list of activities and asked which they would participate in during their trip to the city. One-quarter of respondents also participated in Huntington Beach’s nightlife (25.2%) and/or attended a live performance in the city (24.5%).

*Detail by type of visitor is presented on the following page.*

Figure 9: Activities in Huntington Beach



Question: Which of the following activities will you participate in while visiting Huntington Beach? Base: Attendees who reside outside Huntington Beach. 587 responses.

# Activities in Huntington Beach by Type of Visitor

## Detail by Type of Visitor

	Day Trip	All Overnight	Hotel	Homesharing rental or vacation home	VFR	International
Shopping	72.5%	76.6%	82.3%	79.4%	66.9%	76.2%
Dining in restaurants	63.3%	79.3%	82.3%	68.1%	89.2%	77.9%
Water activity (surfing, kayaking, etc.)	53.6%	63.3%	55.6%	90.1%	58.3%	54.6%
Attend a live performance or other performing arts	24.0%	25.2%	26.1%	20.6%	15.1%	22.1%
Bars or nightlife	19.0%	37.0%	37.6%	38.3%	41.0%	40.9%
Bike rental	5.3%	21.4%	25.2%	32.6%	4.3%	24.6%
Visit museum or gallery	6.9%	9.9%	11.6%	0.0%	12.9%	5.9%
Take a guided sightseeing tour	5.4%	8.4%	10.3%	9.2%	6.5%	3.9%
Base	471	116	59	10	31	39

Question: Which of the following activities will you participate in while visiting Huntington Beach? Base: Attendees who reside outside Huntington Beach. 587 responses.

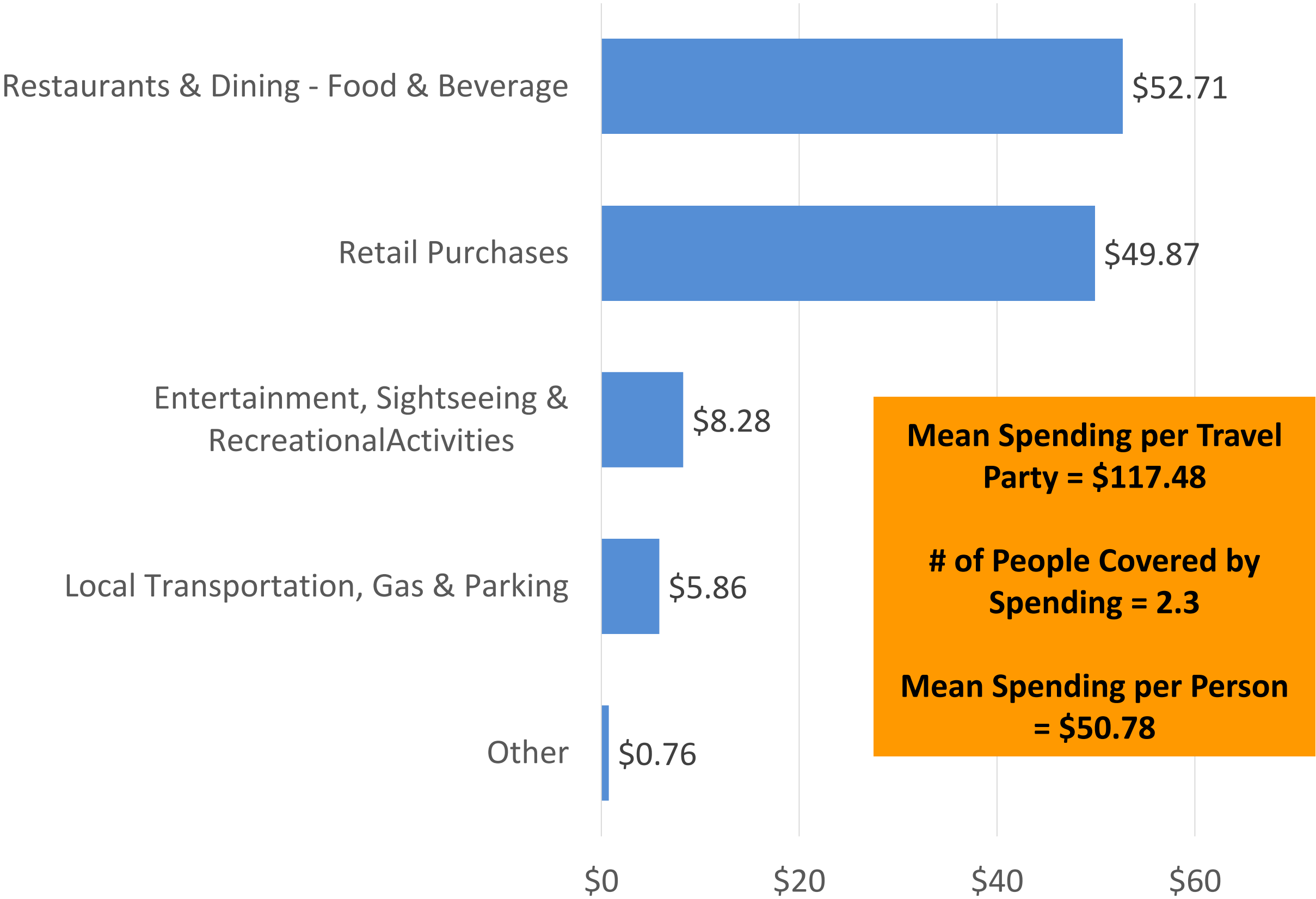


# Huntington Beach Residents: Spending Related to Event

The typical Huntington Beach resident spent \$117.48 per travel party within the city related to their visit to the Vans U.S. Open of Surfing. The bulk of this was spent on restaurants and dining (\$52.71) and retail purchases (\$49.87).

It is estimated that each resident attending the event represented \$50.78 in event-related spending. This is based on the \$117.48 covering an average of 2.3 people.

Figure 10: Huntington Beach Residents—Spending Related to Event



Question: Thinking about your spending today AT THIS EVENT, please estimate the TOTAL amount you will spend within Huntington Beach for each of the following categories. Please only include spending INSIDE Huntington Beach related to your visit to the Vans US Open of Surfing. Base: Huntington Beach residents. 150 responses.

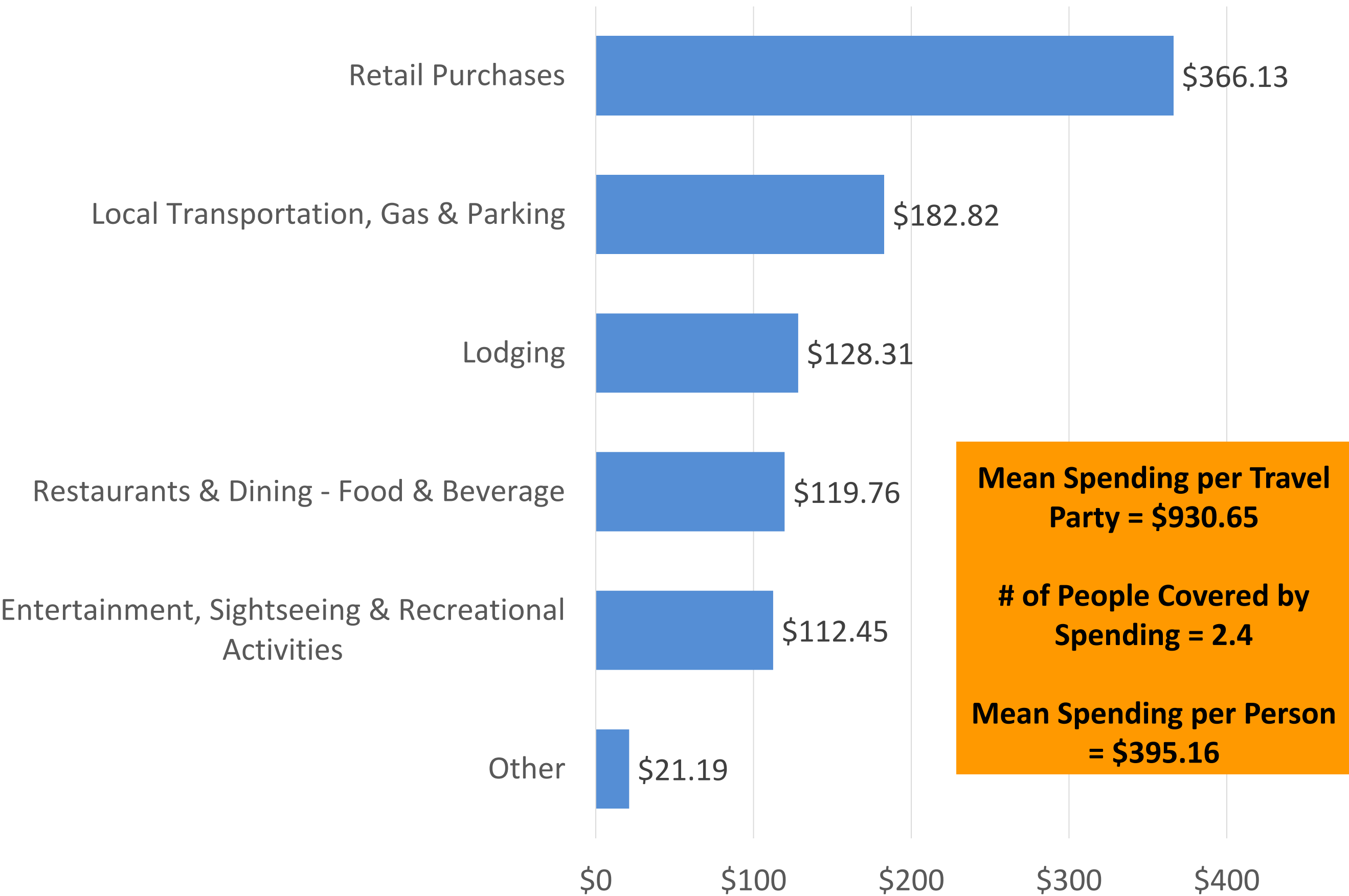
# Visitors: In-Market Spending

The typical visiting attendee surveyed spent a total of \$930.65 per travel party within Huntington Beach over the course of their entire visit to the city. The bulk of this was spent on retail purchases (\$366.13), local transportation, gas & parking (\$182.82) and lodging (\$128.21 across all visitors surveyed; hotel guests spent \$429.63 in total on their lodging while home share renters spent \$449.11, on average).

It is estimated that each visiting attendee represented \$395.16 in-market spending. This is based on the \$930.65 covering an average of 2.4 people.

Question: Thinking about your spending DURING YOUR ENTIRE VISIT TO HUNTINGTON BEACH, please estimate the TOTAL amount you will spend within Huntington Beach for each of the following categories. Base: Attendees who reside outside Huntington Beach. 428 responses.

Figure 11: Visitors—In-Market Spending





# Visitors: In-Market Spending by Type of Visitor

## Detail by Type of Visitor

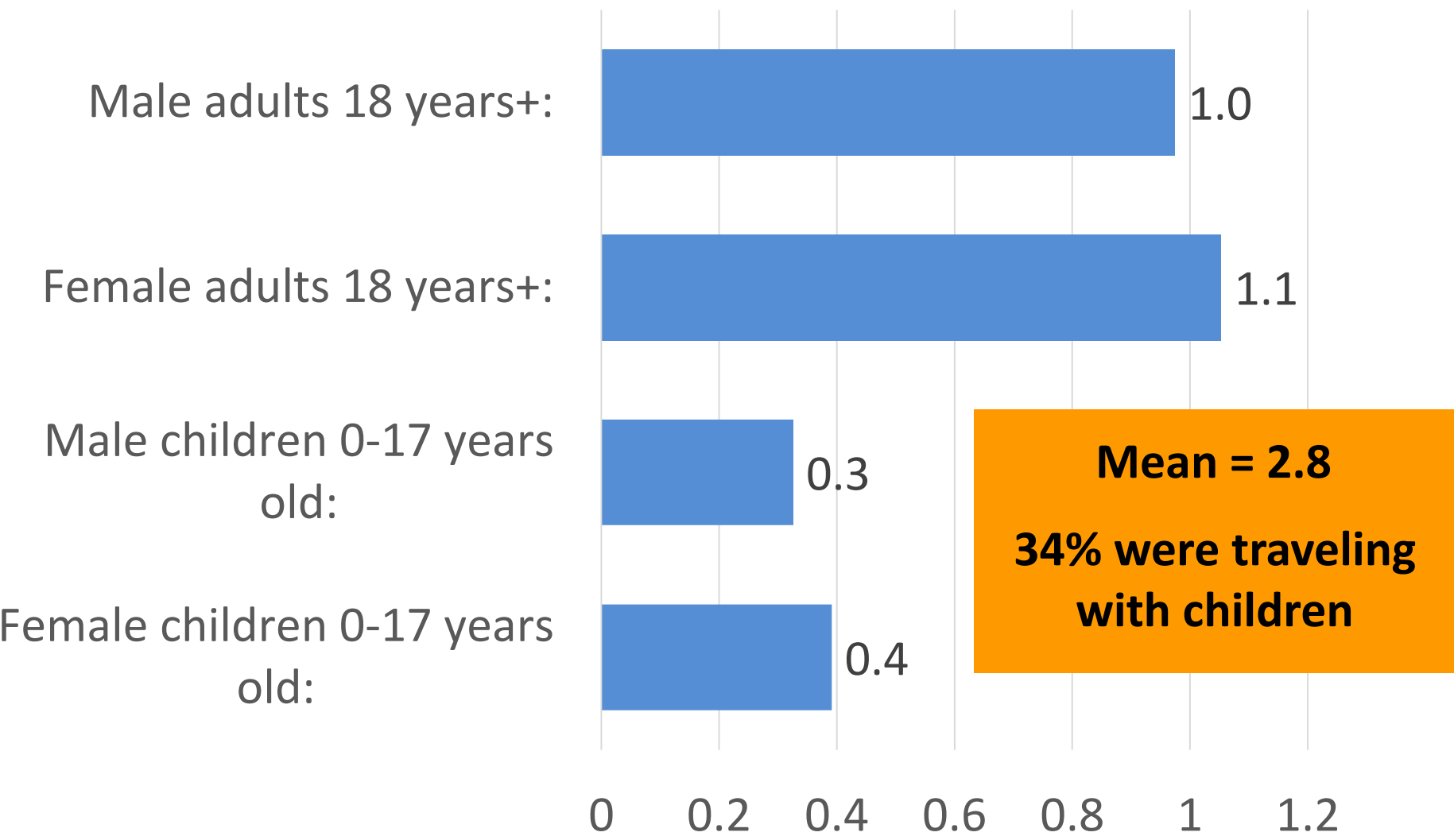
	Day Trip	All Overnight	Hotel	Homesharing rental or vacation home	VFR	International
Lodging	\$16.40	\$347.09	\$429.63	\$449.11	\$53.96	\$241.33
Restaurants & Dining - Food & Beverage	\$71.85	\$213.80	\$228.92	\$233.26	\$168.60	\$133.72
Retail Purchases	\$353.29	\$393.84	\$360.29	\$367.66	\$533.09	\$413.17
Entertainment, Sightseeing & Recreational Activities	\$55.91	\$223.51	\$235.35	\$208.01	\$215.61	\$158.80
Local Transportation, Gas & Parking	\$164.35	\$214.81	\$262.24	\$168.16	\$122.27	\$192.42
Other	\$10.35	\$42.46	\$69.68	\$0.00	\$1.40	\$9.80
Mean TOTAL Spending per Travel Party	\$672.15	\$1,435.51	\$1,586.10	\$1,426.21	\$1,094.93	\$1,149.24
# of People Covered by Spending	2.3	2.6	2.7	2.4	2.3	2.4
Mean TOTAL Spending per Person	\$295.14	\$560.50	\$596.64	\$585.87	\$486.21	\$470.60
Base	467	116	59	10	31	39

Question: Thinking about your spending DURING YOUR ENTIRE VISIT TO HUNTINGTON BEACH, please estimate the TOTAL amount you will spend within Huntington Beach for each of the following categories. Base: Attendees who reside outside Huntington Beach. 428 responses.

# Travel Party Composition

The average travel party was comprised of 2.8 people across all attendees surveyed. Huntington Beach residents and attendees who live outside the city had similar travel party sizes averaging just under three people each (2.6 and 2.8, respectively). In total 34.0 percent of attendees had children under the age of 18 in their party.

Figure 12: Travel Party Composition



Detail by Type of Visitor

	Day Trip	All Overnight	Hotel	Homesharing rental or vacation home	VFR	International
Male adults 18 years+:	1.0	1.1	1.2	1.4	1.0	1.0
Female adults 18 years+:	1.0	1.3	1.2	1.5	1.2	1.1
Male children 0-17 years old:	0.3	0.4	0.4	0.5	0.3	0.3
Female children 0-17 years old:	0.3	0.5	0.4	1.2	0.3	0.4
Mean Travel Party Size	2.6	3.3	3.2	4.6	2.8	2.8
% with Children in Party	29.3%	39.1%	40.8%	60.3%	30.2%	36.1%
Base	470	116	59	10	31	39

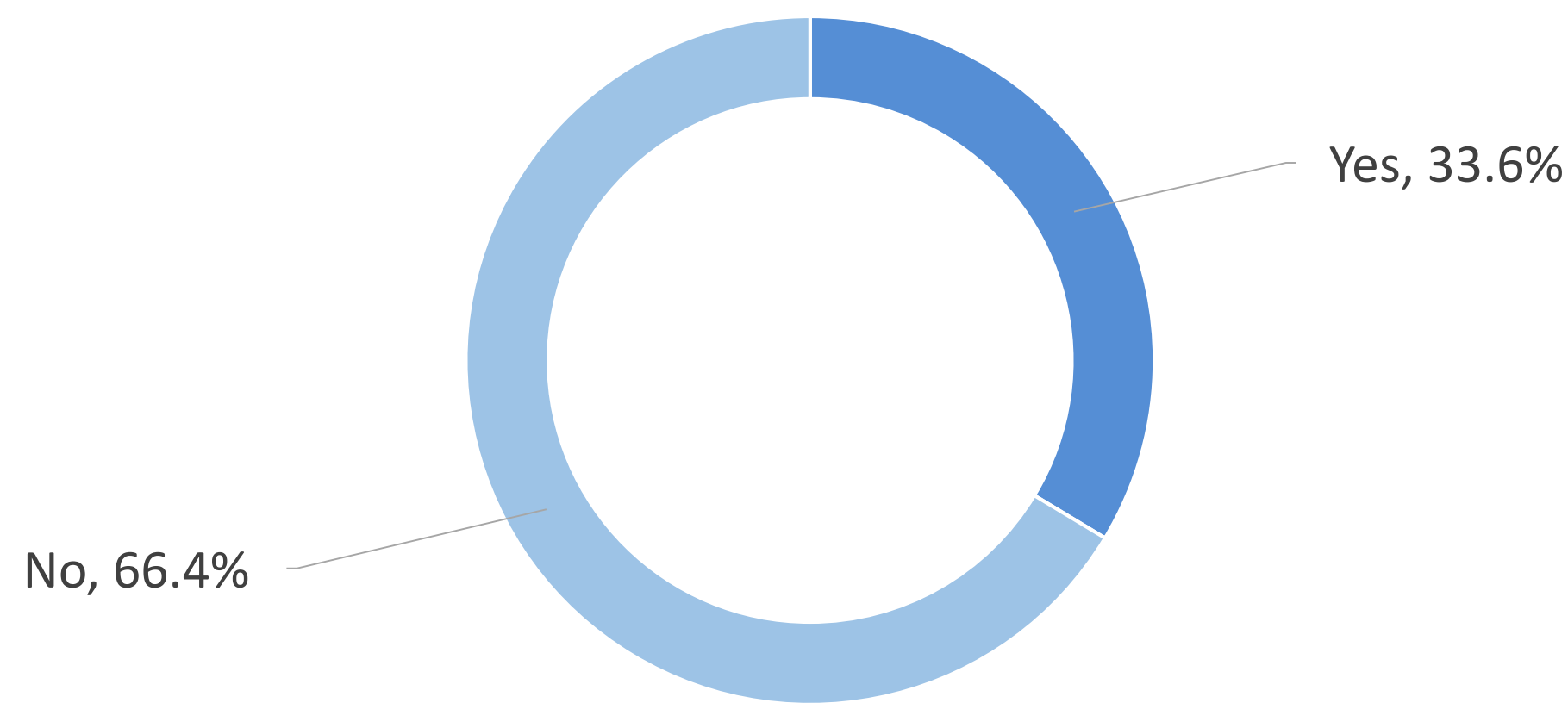
Question: How many adults and children are in your immediate traveling party, including yourself? Base: All respondents. 744 responses.



# Overnight Visitors—Length of Stay

**One-third of all visiting attendees surveyed stayed overnight within Huntington Beach (33.6%).** Half of all international visitors surveyed stayed overnight in the destination as part of their trip (51.0%).

Figure 13: Overnight Visitors



Question: Are you staying overnight within Huntington Beach on this trip? Base: Attendees who reside outside Huntington Beach. 587 responses.

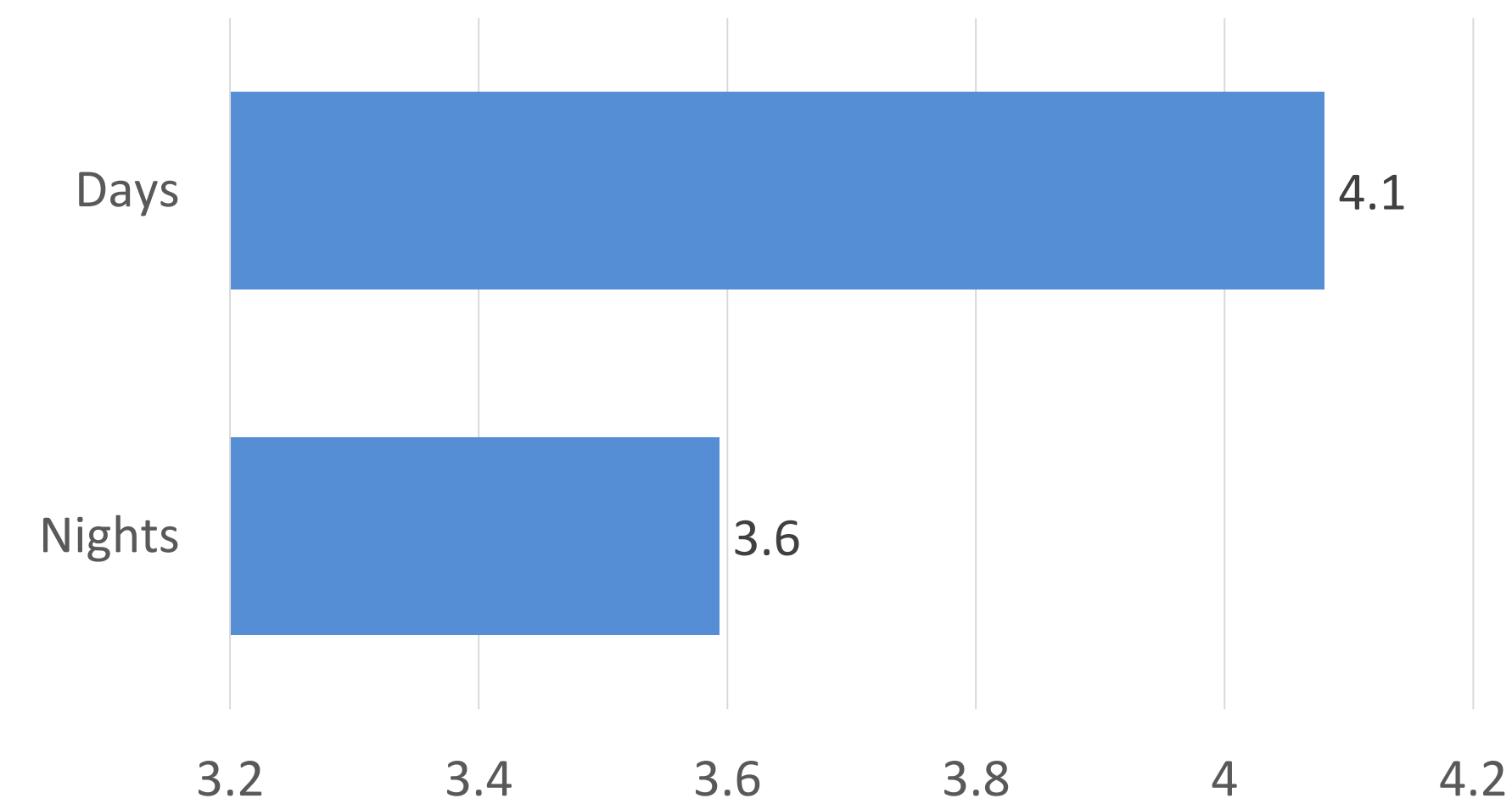
Detail by Type of Visitor

	Domestic	International
Yes	31.3%	51.0%
No	68.7%	49.0%
Base	548	39

# Overnight Visitors—Length of Stay

**Overnight visitors spent an average of 4.1 days and 3.6 nights within Huntington Beach on their trip.** The typical hotel guest visitor surveyed spent 3.6 days and 3.0 nights in the destination, while international visitors had a similar length of stay averaging 3.8 days and 3.1 nights.

Figure 14: Length of Stay



Detail by Type of Visitor

	All Overnight	Hotel	Home sharing rental or vacation home	VFR	International
Mean					
Days	4.1	3.6	5.1	4.3	3.8
Nights	3.6	3.0	5.0	3.7	3.1
Base	104	57	8	28	12

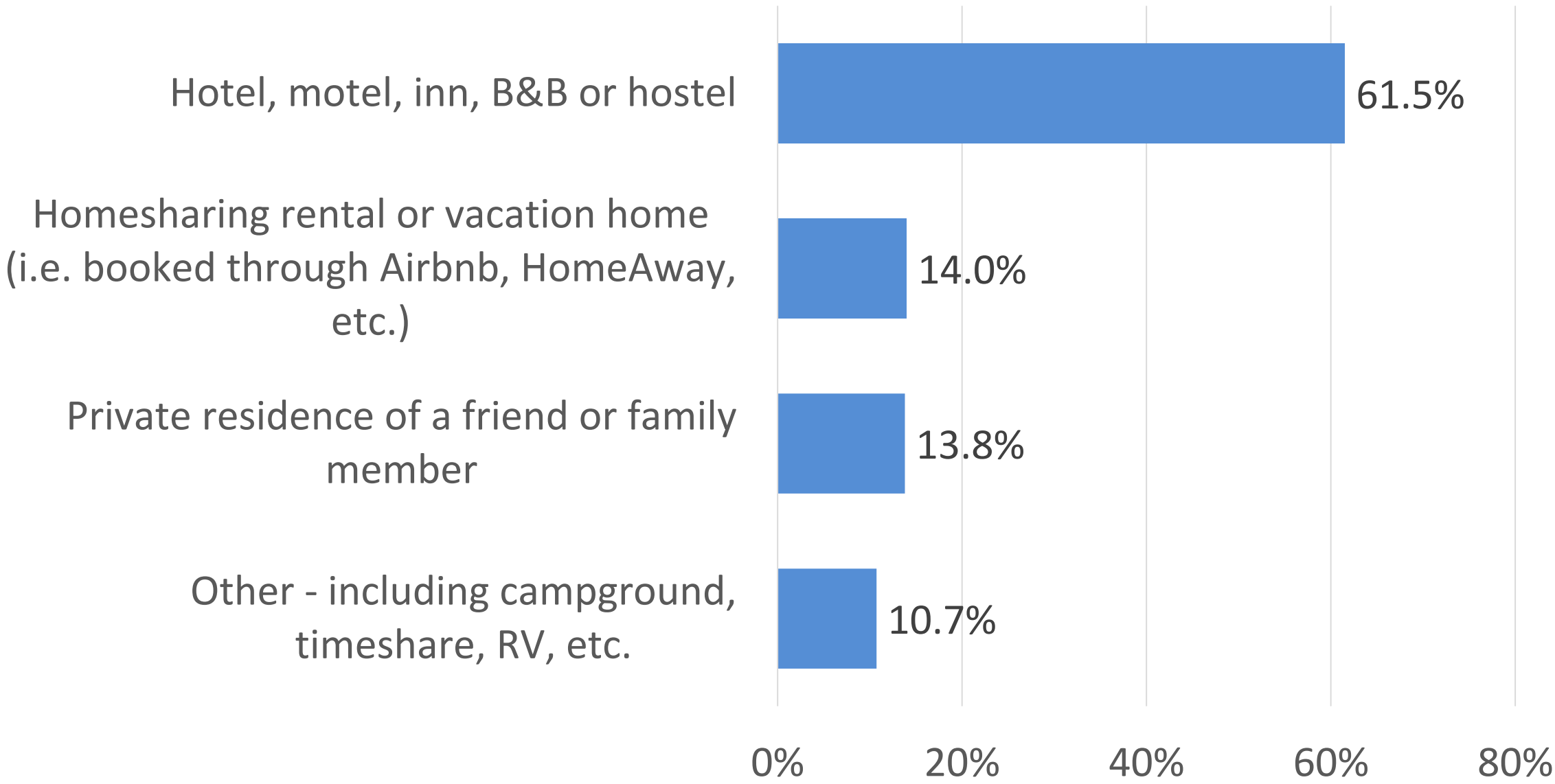
Question: How many total days and nights are you staying in Huntington Beach on this visit? Base: Visiting attendees who stayed overnight in Huntington Beach. 114 responses.



# Place of Stay

Six-in-ten overnight visitors surveyed stayed in a Huntington Beach hotel while attending the Vans U.S. Open of Surfing (61.5%). Additionally 14.0 percent of this group stayed in a home share rental such as an Airbnb within the city while 13.8 percent stayed in the private home of a local friend/family member.

Figure 15: Place of Stay



Question: What type of lodging are you staying overnight in within Huntington Beach?  
Base: Visiting attendees who stayed overnight in Huntington Beach. 114 responses.

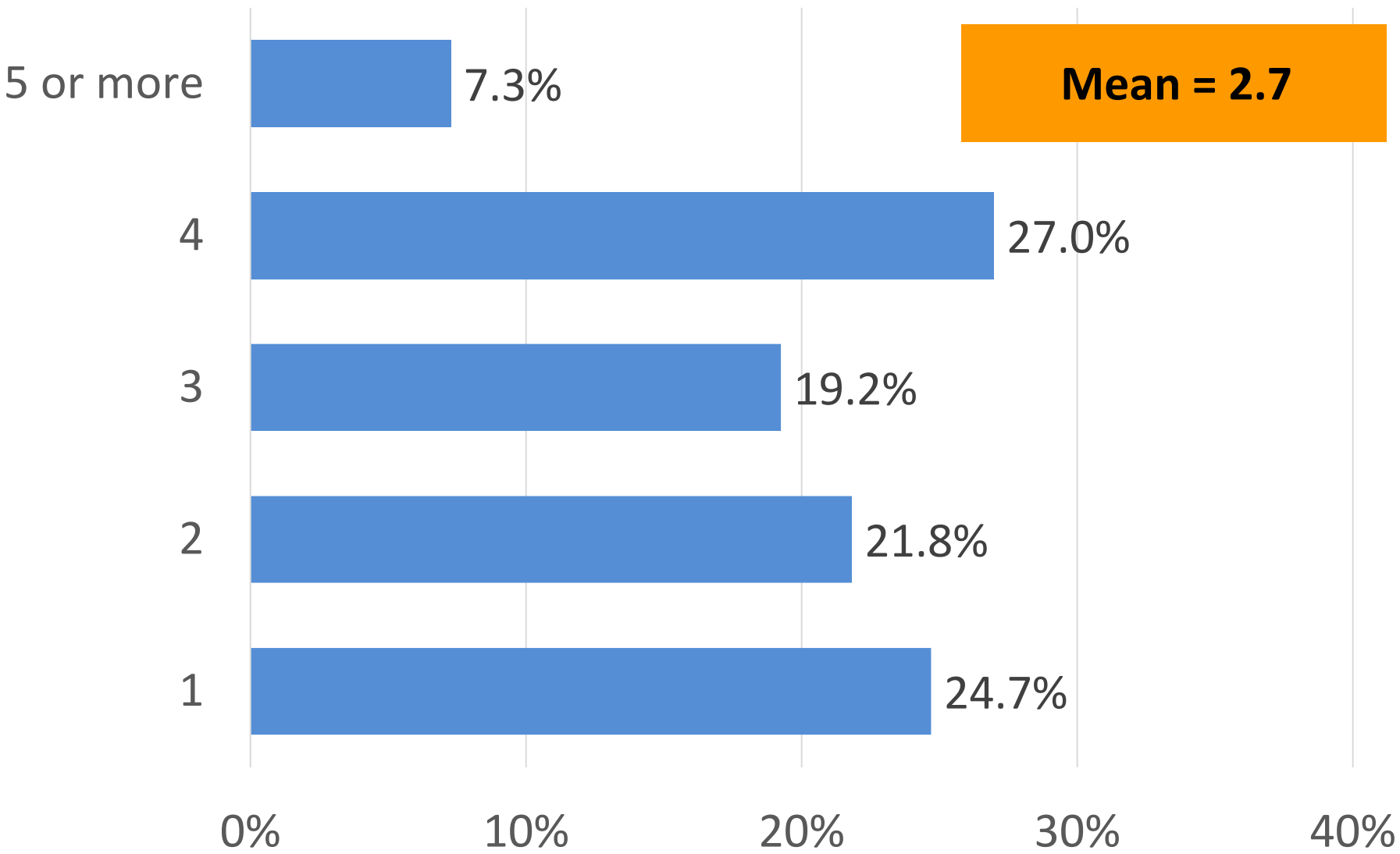
Detail by Type of Visitor

	Domestic	International
Hotel	59.5%	71.4%
Home sharing rental or vacation home	13.5%	16.7%
Private residence of a friend or family member	15.4%	6.0%
Other – including campground, timeshare, RV, etc.	11.7%	6.0%
Base	102	12

# Number of People in Hotel Room/Home Share

The typical overnight visitor who stayed in paid lodging within Huntington Beach had 2.7 people in their accommodations.

Figure 16: Number of People in Hotel Room/Home Share



Detail by Type of Visitor

	Hotel	Homesharing rental or vacation home	Domestic	International
5 or more	8.2%	0.0%	9.1%	0.0%
4	25.3%	40.3%	25.3%	33.6%
3	21.6%	0.0%	21.3%	11.2%
2	22.1%	19.4%	19.0%	32.8%
1	22.8%	40.3%	25.3%	22.4%
Mean	2.7	2.4	2.7	2.6
Base	56	5	52	9

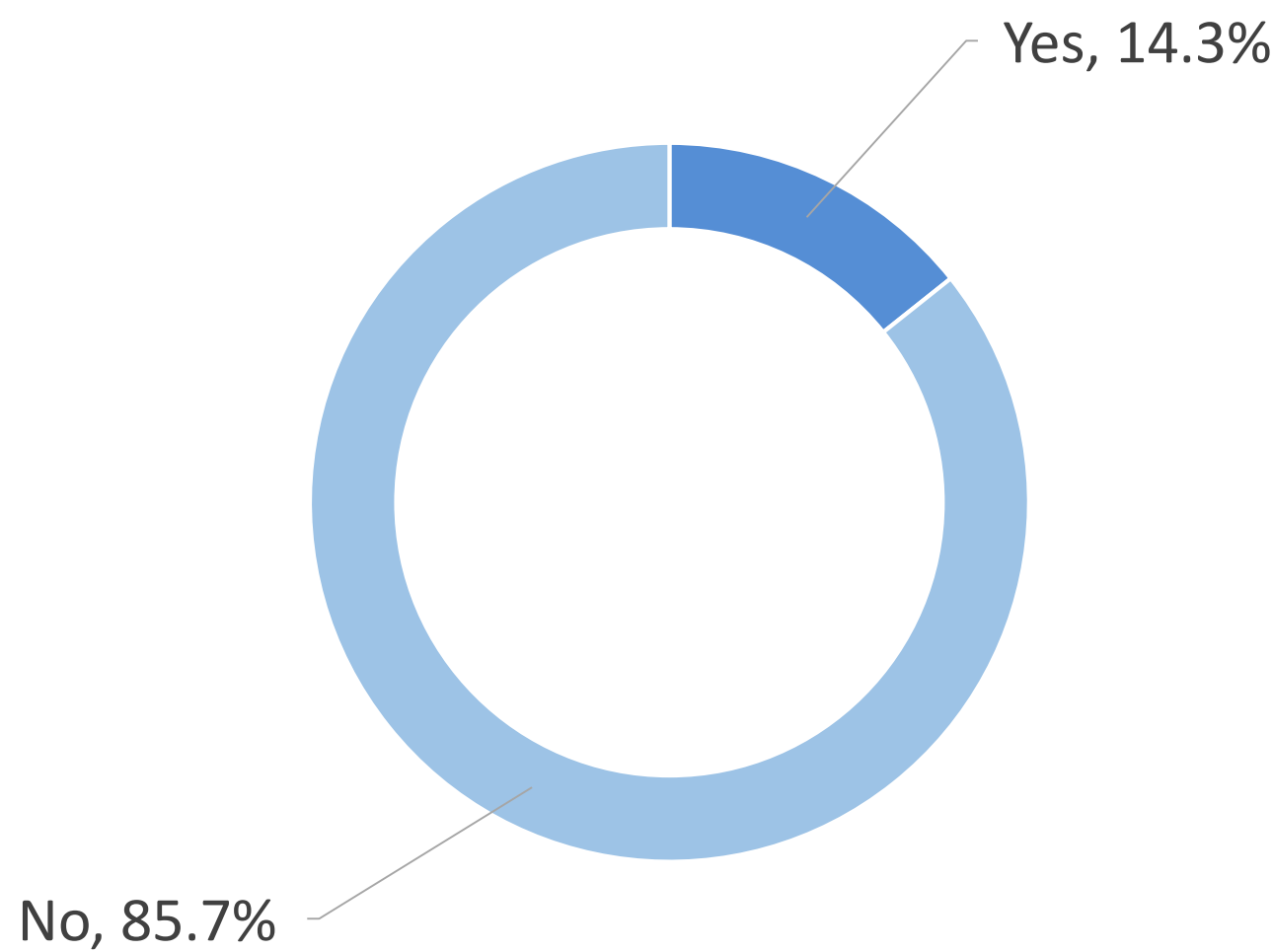
Question: Including yourself, how many people are staying in your (HOTEL ROOM) / (HOME SHARING RENTAL)? Base: Visiting attendees who stayed overnight in paid lodging within Huntington Beach. 61 responses.



# First Time Visitors

A majority of Vans U.S. Open of Surfing attendees who reside outside Huntington Beach were repeat visitors to the city. In total, 85.7 percent of this group were returning to Huntington Beach while 14.3 percent were in the city for the first-time.

Figure 17: First Time Visitors



Detail by Type of Visitor

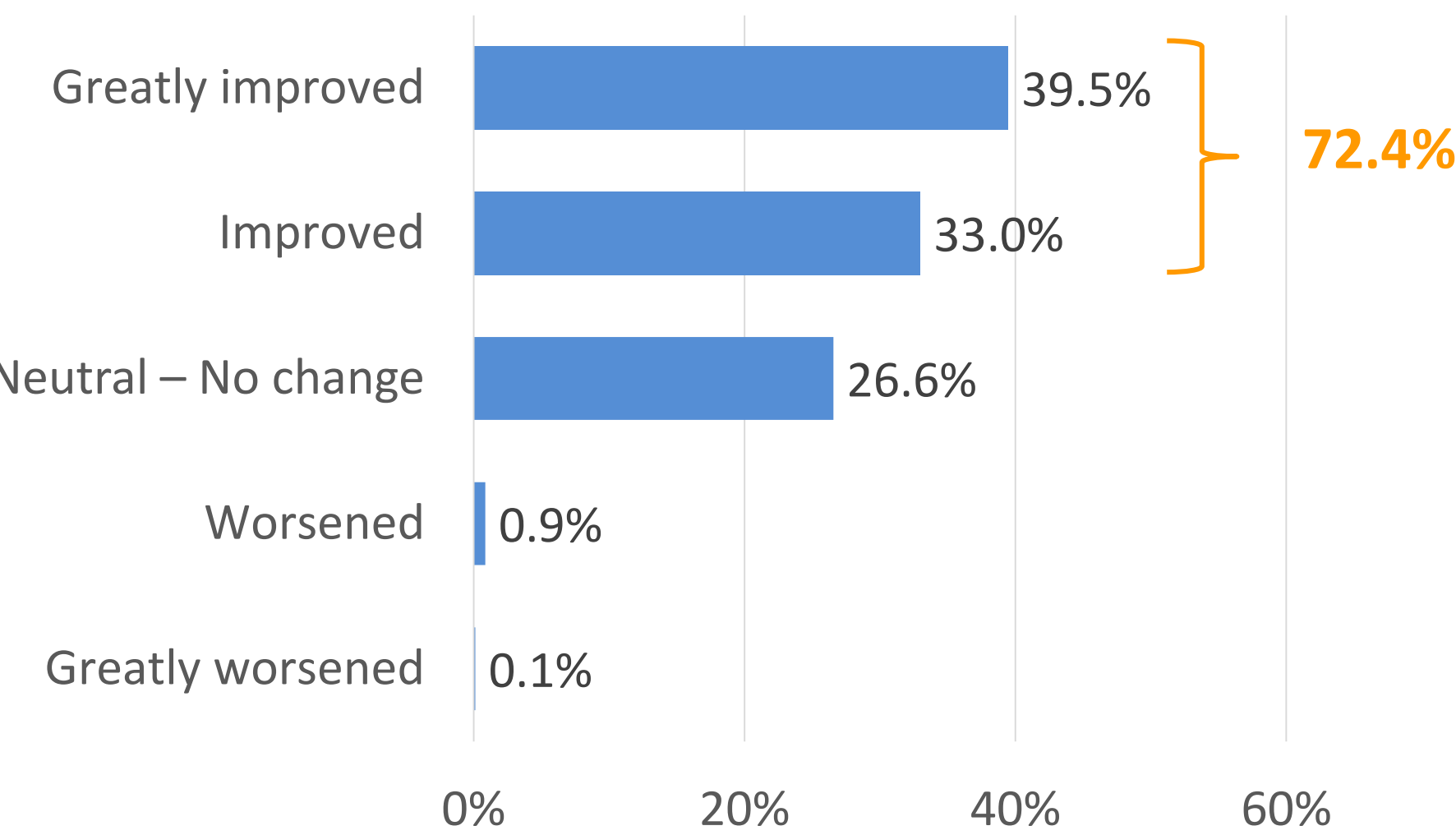
	Day Trip	All Overnight	Hotel	Homesharing rental or vacation home	VFR	International
Yes	12.4%	18.2%	17.3%	22.7%	13.5%	49.3%
No	87.6%	81.8%	82.7%	77.3%	86.5%	50.7%
Base	470	115	59	10	30	39

Question: Is this your first visit to Huntington Beach? Base: Attendees who reside outside Huntington Beach. 586 responses.

# Event’s Impact on Visitors’ Perception of Huntington Beach

The Vans U.S. Open of Surfing had an overwhelmingly positive impact on visitors’ perception of Huntington Beach. Nearly three-quarters of event attendees, who reside outside Huntington Beach, said their experience at the event “improved” (33.0%) or “greatly improved” (39.5%) their perception of the city. Only 1.0 percent of these respondents said the event had worsened their perception of Huntington Beach.

Figure 18: Event’s Impact on Visitors’ Perception of HB



Detail by Type of Visitor

	Day Trip	All Overnight	Hotel	Home sharing rental or vacation home	VFR	International
Top-Two Box Score	68.9%	79.4%	79.0%	88.7%	78.4%	75.4%
Greatly improved	36.4%	44.8%	47.4%	39.7%	46.0%	46.3%
Improved	32.5%	34.5%	31.6%	48.9%	32.4%	29.1%
Neutral – No change	30.5%	18.9%	19.0%	11.3%	17.3%	24.6%
Worsened	0.4%	1.8%	1.9%	0.0%	4.3%	0.0%
Greatly worsened	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Base	464	116	59	10	31	38

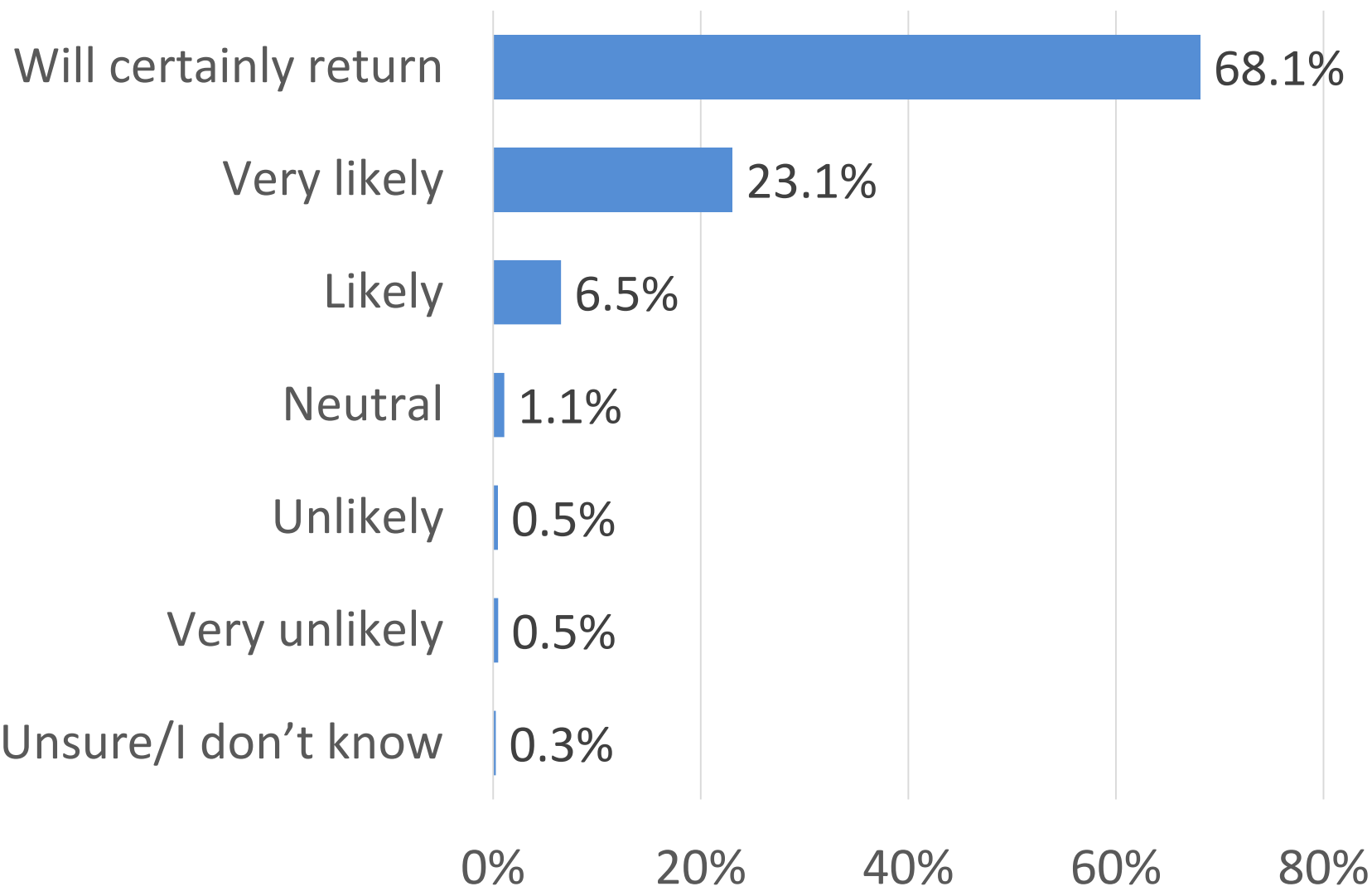
Question: How has your experience in Huntington Beach during the Vans US Open of Surfing impacted your OVERALL PERCEPTION of Huntington Beach? Base: Attendees who reside outside Huntington Beach. 580 responses.



# Likelihood to Return

**Likelihood to return to Huntington Beach is high.** A majority of visitors surveyed said they “will certainly return” (68.1%) to Huntington Beach and an additional 23.1 percent said they are “very likely.”

Figure 19: Likelihood to Return



Detail by Type of Visitor

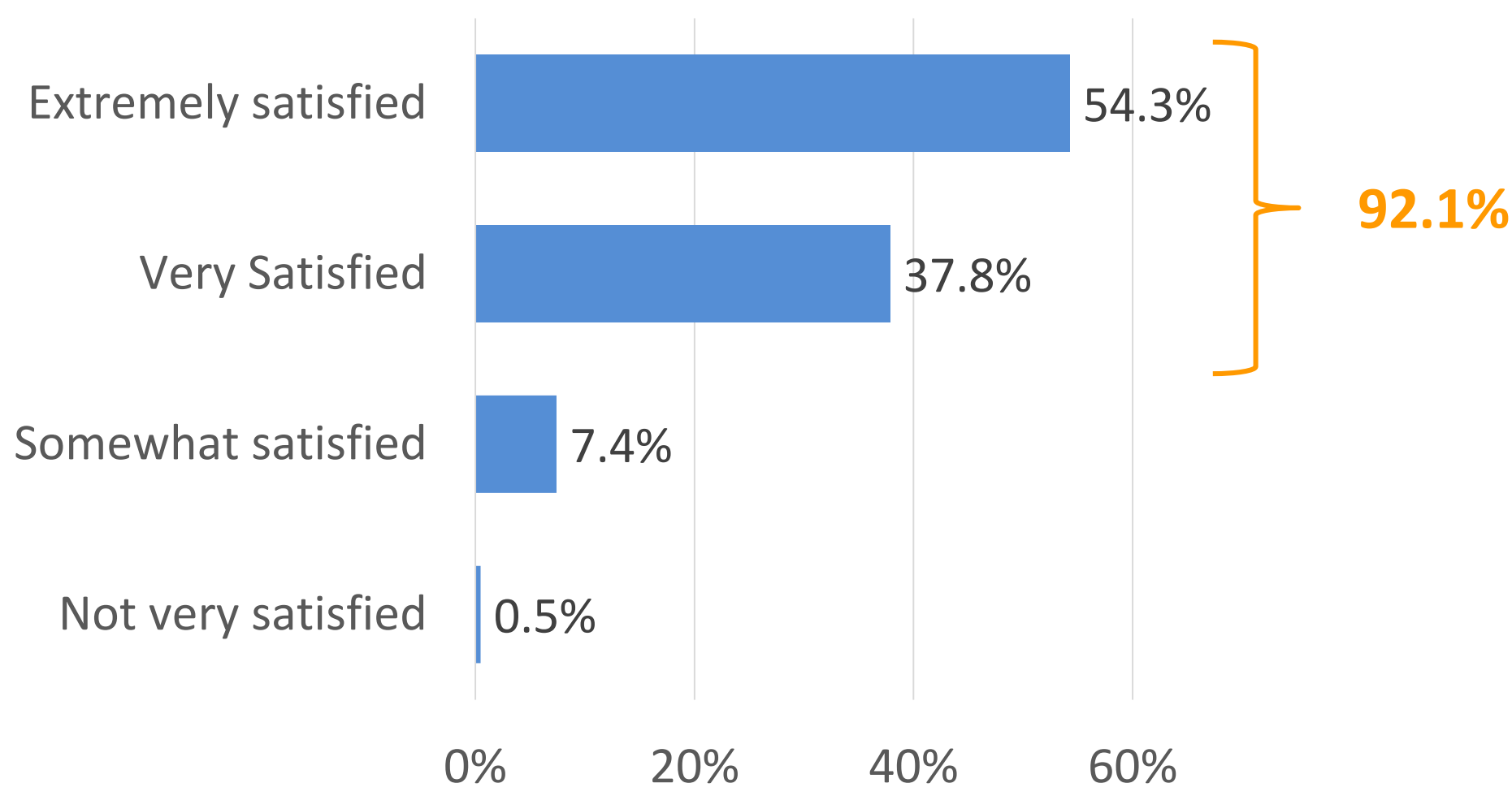
	Day Trip	All Overnight	Hotel	Homesharing rental or vacation home	VFR	International
Will certainly return	70.0%	63.9%	60.1%	68.1%	69.9%	52.9%
Very likely	21.9%	25.9%	26.1%	20.6%	27.8%	26.3%
Likely	6.3%	6.9%	8.8%	11.3%	0.0%	8.4%
Neutral—Neither likely nor unlikely	0.7%	1.8%	2.5%	0.0%	2.3%	4.2%
Unlikely	0.7%	0.0%	0.0%	0.0%	0.0%	3.9%
Very unlikely	0.0%	1.5%	2.5%	0.0%	0.0%	4.2%
Unsure/I don't know	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Base	469	114	58	10	30	39

Question: How likely are you to return to Huntington Beach? Base: Attendees who reside outside Huntington Beach. 582 responses.

# Satisfaction with Overall Experience at Event

**The Vans U.S. Open of Surfing appears to provide a highly satisfactory attendee experience.** Nearly all attendees surveyed said they were “very satisfied” (37.8%) or “extremely satisfied” (54.3%) with their overall experience at the event. Both locals and non-locals expressed similarly high levels of satisfaction with the Vans U.S. Open of Surfing (Top-Two Box Score 91.0% and 92.6%, respectively).

Figure 20: Satisfaction with Overall Experience at Event



Detail by Type of Visitor

	Huntington Beach Residents	Day Trip	All Overnight	Hotel	Homesharing rental or vacation home	VFR	International
Top-Two Box Score	91.0%	91.5%	95.0%	93.2%	100.0%	93.5%	87.7%
Extremely satisfied	53.8%	50.0%	62.6%	69.5%	58.9%	54.0%	57.1%
Very Satisfied	37.2%	41.4%	32.4%	23.7%	41.1%	39.6%	30.5%
Somewhat satisfied	8.3%	7.9%	5.0%	6.8%	0.0%	6.5%	12.3%
Not very satisfied	0.6%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Base	153	470	116	59	10	31	39

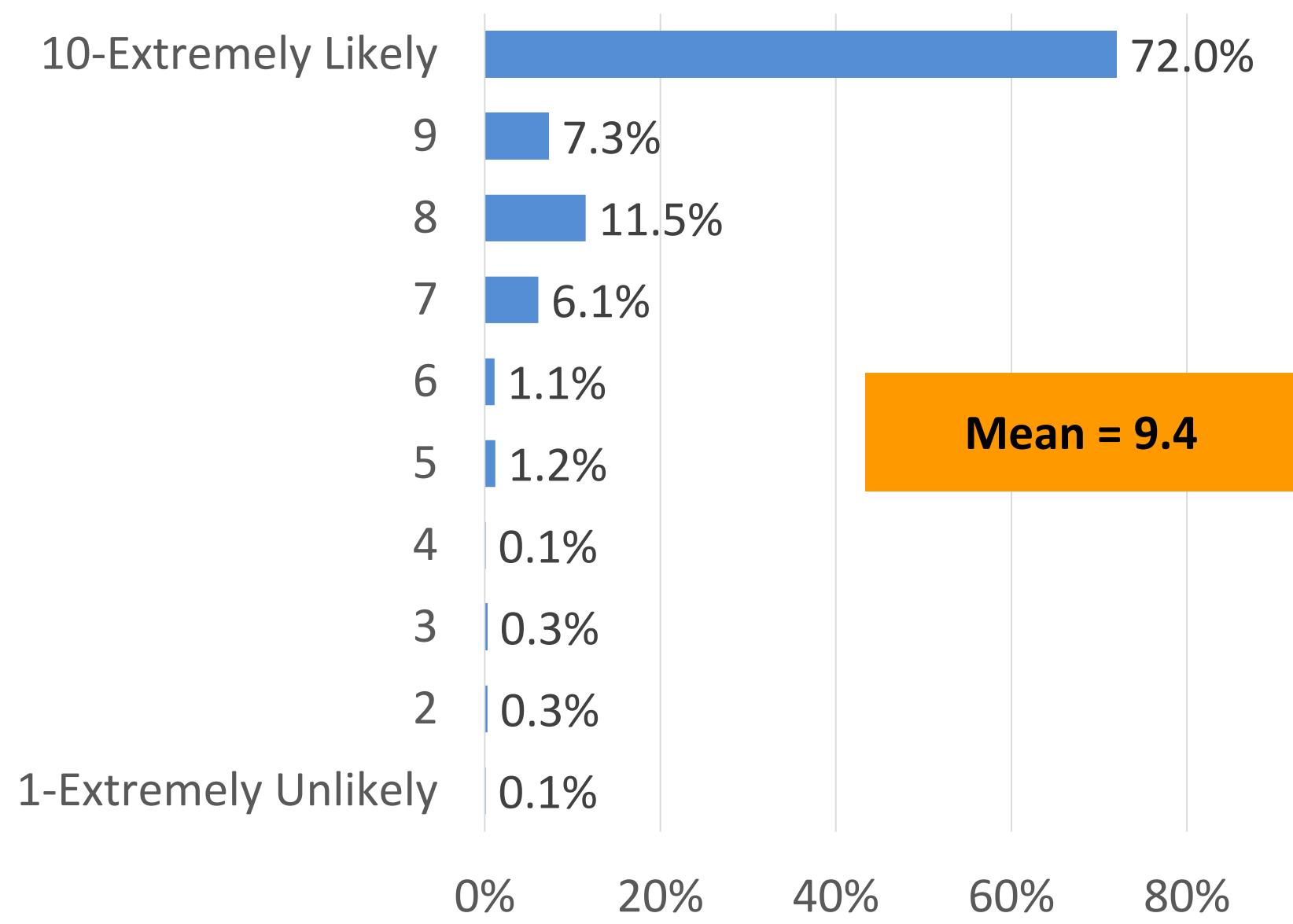
Question: How satisfied are you with your overall experience at the Vans US Open of Surfing? Base: All respondents. 744 responses.



# Likelihood to Recommend Event

In line with the high levels of attendee satisfaction, all respondents rated their likelihood to recommend the Vans U.S. Open of Surfing as a 9.4 out of 10. In fact, nearly three-quarters of all attendees surveyed said they were “extremely likely” to recommend the event to a friend (72.0%).

Figure 21: Likelihood to Recommend Event



Detail by Type of Visitor

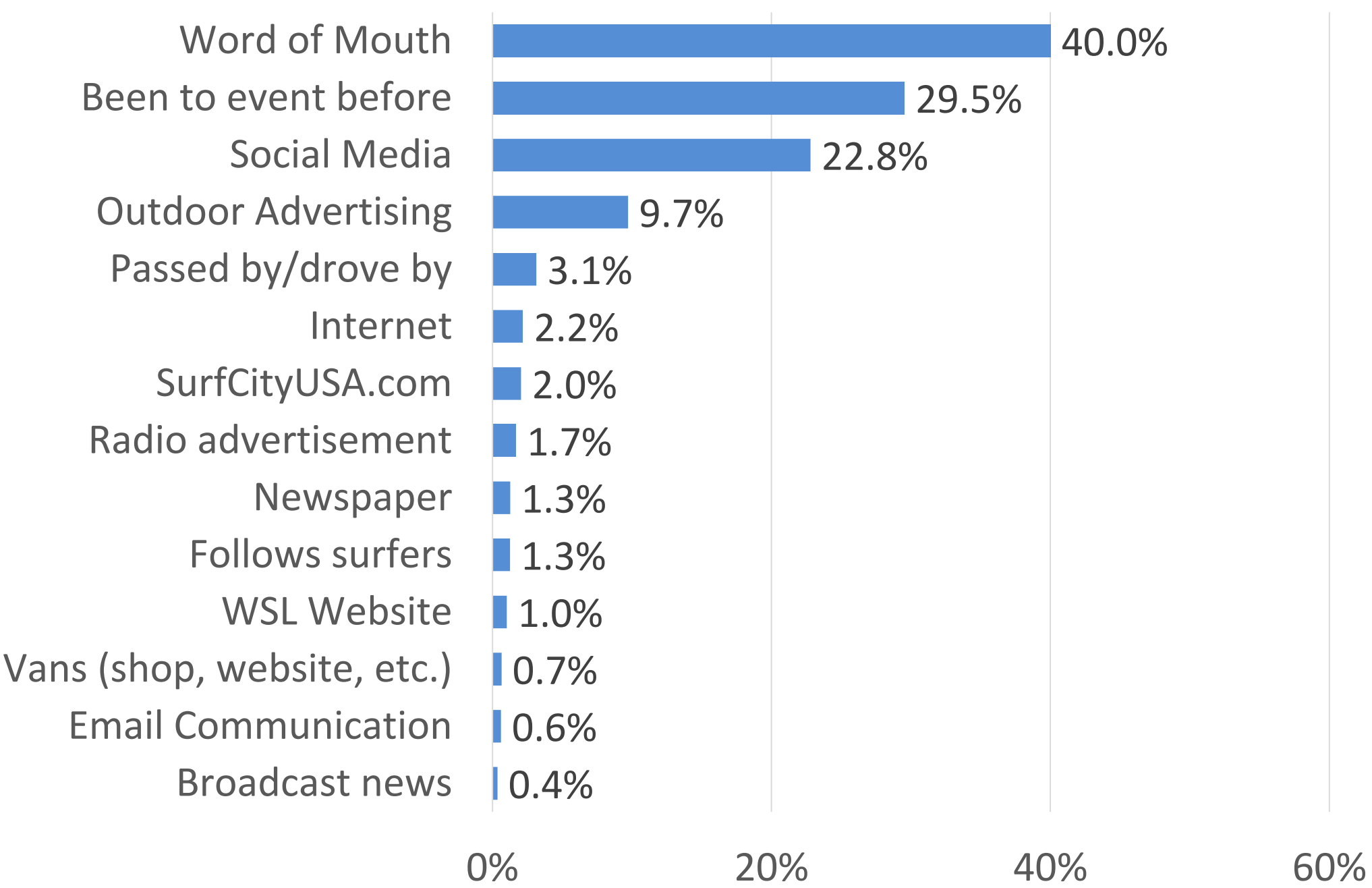
	Huntington Beach Residents	Day Trip	All Overnight	Hotel	Homesharing rental or vacation home	VFR	International
10-Extremely Likely	68.6%	73.5%	74.9%	80.9%	64.8%	66.1%	68.9%
9	8.5%	6.1%	7.6%	7.2%	22.7%	4.7%	5.9%
8	11.8%	12.3%	9.2%	5.7%	12.5%	17.3%	12.9%
7	7.2%	4.9%	6.9%	6.2%	0.0%	9.4%	12.3%
6	1.3%	0.8%	1.4%	0.0%	0.0%	2.4%	0.0%
5	2.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%
4	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
3	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
2	0.7%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
1-Extremely Unlikely	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Mean	9.3	9.4	9.5	9.6	9.5	9.2	9.3
Base	153	466	110	58	9	28	39

Question: How likely are you to recommend this event to a friend? Base: All respondents. 730 responses.

# Advertising Recall

**Word of mouth (40.0%) and past attendance (29.5%) to the event were the top methods in which respondents had heard about the Vans U.S. Open of Surfing.** Additionally, over one-in-five of all attendees surveyed said they heard about the event through social media (22.8%). International visitors were the most likely group to have heard about the event through social media (49.3%) or by passing through (8.1%) compared to the other attendee segments.

Figure 22: Advertising Recall



Question: How did you hear about the 2018 Vans US Open of Surfing? Base: All respondents. 751 responses.

Detail by Type of Visitor

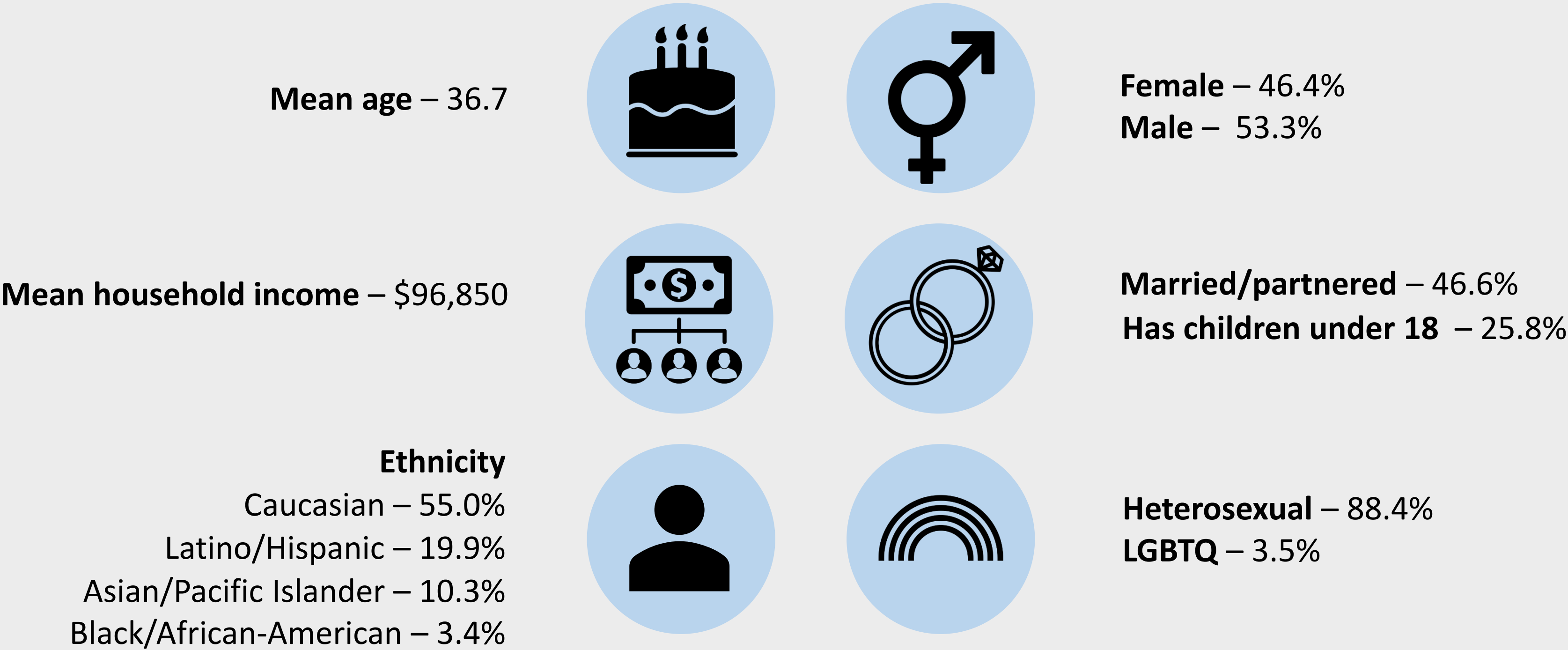
	Day Trip	All Overnight	Domestic	International
Word of Mouth	41.6%	45.1%	41.9%	19.0%
Been to event before	24.7%	18.0%	31.4%	7.8%
Social Media	24.6%	26.9%	20.5%	49.3%
Outdoor Advertising	6.5%	10.1%	10.2%	3.9%
Passed by/drove by	3.9%	4.2%	2.7%	8.1%
Internet	2.7%	2.3%	2.0%	3.9%
SurfCityUSA.com	1.4%	0.8%	2.1%	2.0%
Radio advertisement	1.8%	1.2%	1.8%	0.0%
Newspaper	1.0%	0.0%	1.4%	0.0%
Follows surfers	2.3%	0.0%	1.0%	3.9%
WSL Website	1.6%	0.5%	1.0%	2.0%
Vans (shop, website, etc.)	1.0%	0.0%	0.7%	0.0%
Email Communication	0.4%	0.0%	0.6%	0.0%
Broadcast news	0.8%	0.0%	0.4%	0.0%
Base	471	116	706	39



# DEMOGRAPHICS

# Non-Local: Attendee Demographics

The following presents the demographic profile for Vans U.S. Open of Surfing attendees who reside OUTSIDE Huntington Beach





# Huntington Beach Residents: Attendee Demographics

The following presents the demographic profile for Huntington Beach residents surveyed who attended the Vans U.S. Open of Surfing

