



California International Airshow
Economic Impact & Attendee Survey
Report of Findings

December 2015

Research Overview & Methodology

This report presents the findings of a survey of attendees of the California International Airshow Salinas, 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 intercept survey of event attendees. On September 26th and September 27th, Destination Analysts' survey team canvassed the California International Airshow in Salinas and randomly interviewed attendees. In total, 331 fully completed surveys of event attendees were gathered. 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 California International Airshow.

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.



Destination Analysts team member interviews an Airshow attendee inside the cargo jet.

Research Overview & Methodology (continued)

The economic impact estimates provided in this report are based on 40,859 attendees to the California International Airshow. This attendance number was provided by the California International Airshow.

IMPORTANT NOTE: Attendee spending is defined as spending in Monterey County by California International Airshow 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 the Airshow. 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

Total attendance -----	40,859*
% from outside Monterey County -----	38.0%
Attendees from outside Monterey County -----	15,527
% in destination for event -----	88.3%
Incremental attendees -----	13,710
Average length of stay (nights) -----	1.2
Incremental visitor days -----	16,535
Average spending per day per attendee -----	\$88.68
Total incremental trip spending -----	\$1,466,289

**Total attendance number provided by the California International Airshow*

Economic Impact Estimates – Detailed Incremental Visitor Spending

Detailed incremental visitor spend

Hotel/motel/inn	\$114,468
Restaurants	\$352,589
Retail purchases	\$227,947
Entertainment & sightseeing	\$293,942
Car rental fees	\$43,809
Gas, parking and local transportation	\$260,026
Other	\$173,508
TOTAL	\$1,466,289

Incremental attendees in hotels	957
Incremental room nights generated	888

Taxes generated	
Sales	\$114,904.75
Hotel	\$12,019.13
Total	\$126,923.88



Detailed Findings

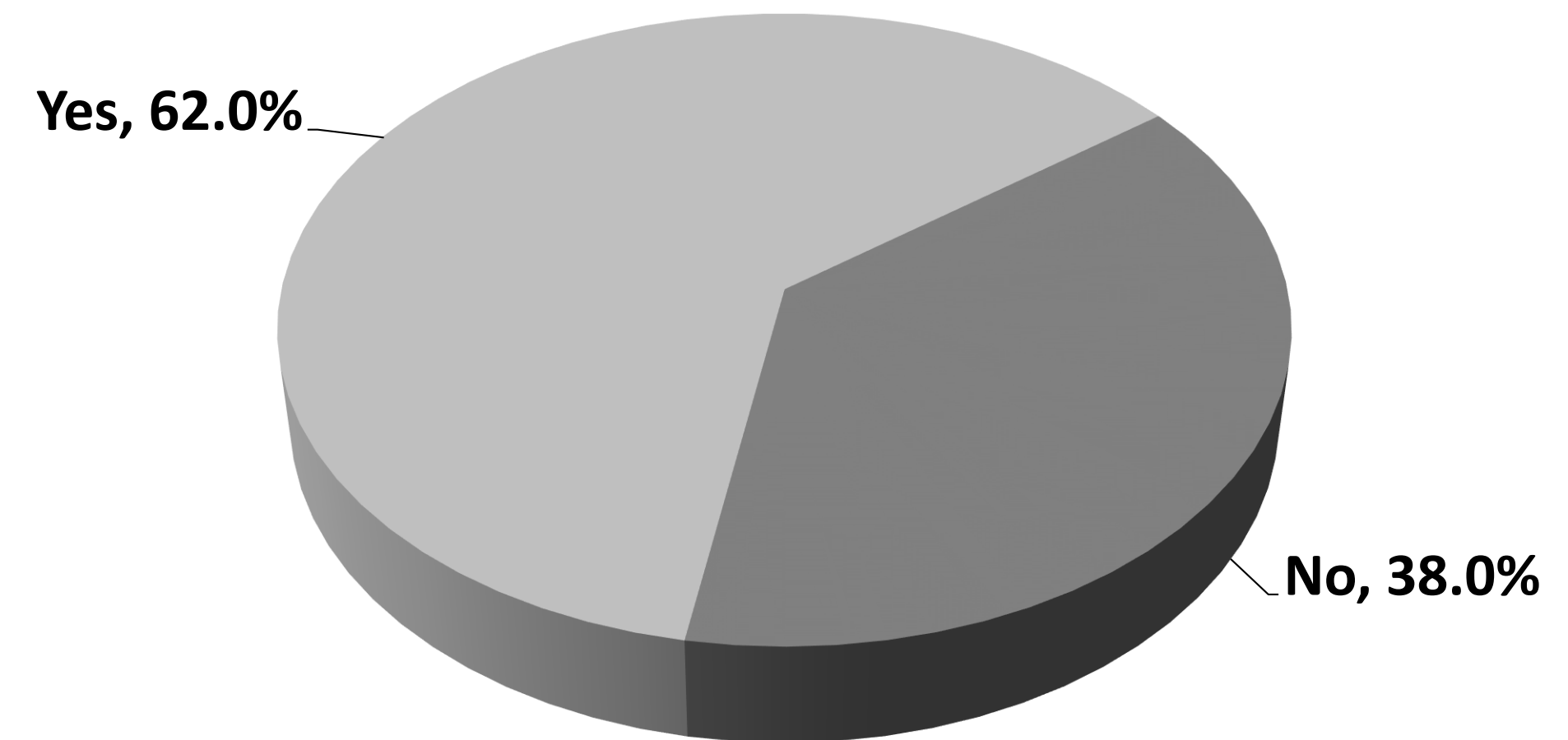


Monterey County Resident

Approximately forty percent of Airshow attendees surveyed live outside Monterey County (38.0%).

Question: Do you live in Monterey County, California? Base: All Respondents. 321 completed surveys.

Chart 1: Monterey County Resident

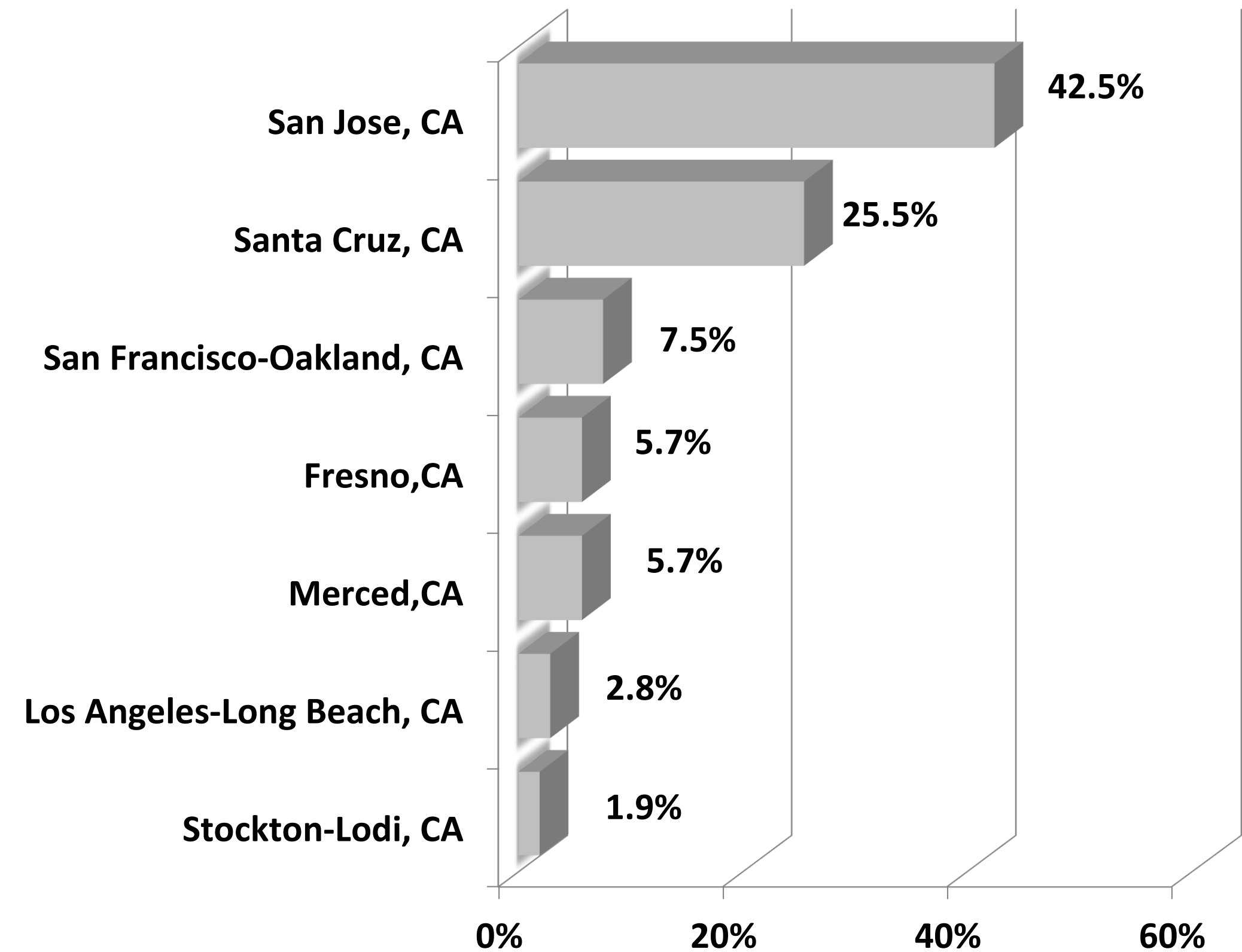


Visitor Place of Residence

Over 40 percent of Airshow attendees surveyed who live outside Monterey County reside in San Jose (42.5%). Another 25.5 percent reported living in Santa Cruz, while an additional 7.5 percent of respondents reside in San Francisco-Oakland.

Question: What town do you live in? Base: Respondents who live outside Monterey County. 106 completed surveys.

Chart 2: Visitor Place of Residence

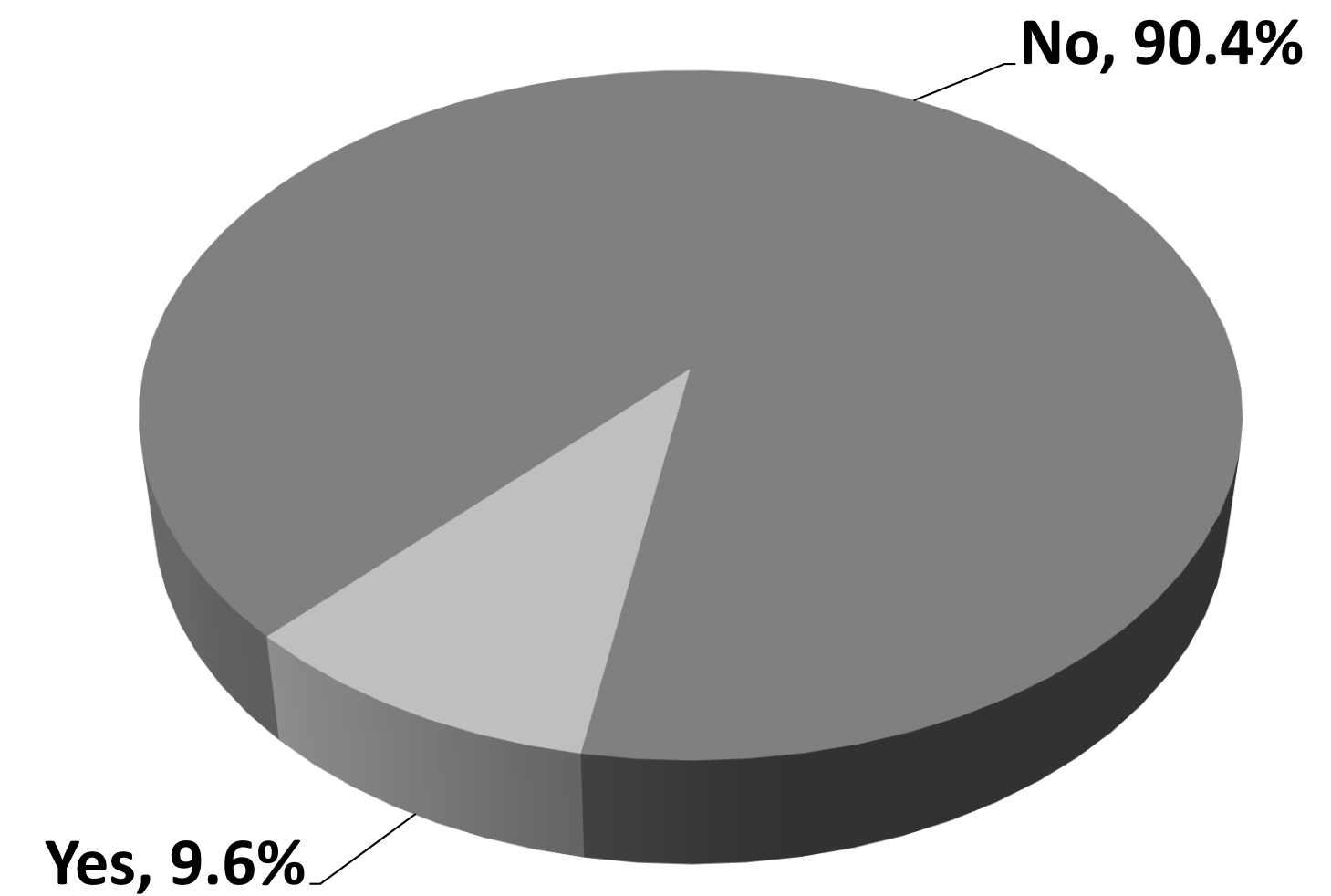


Overnight Stay

Ninety percent of attendees surveyed who live outside Monterey County did not stay overnight in Monterey County during their trip to attend the Airshow. The remaining ten percent did stay overnight in Monterey County.

Question: Are you staying overnight (last night or tonight) anywhere in the Monterey County? Base: Respondents who live outside of Monterey County. 115 completed surveys.

Chart 3: Overnight Stay

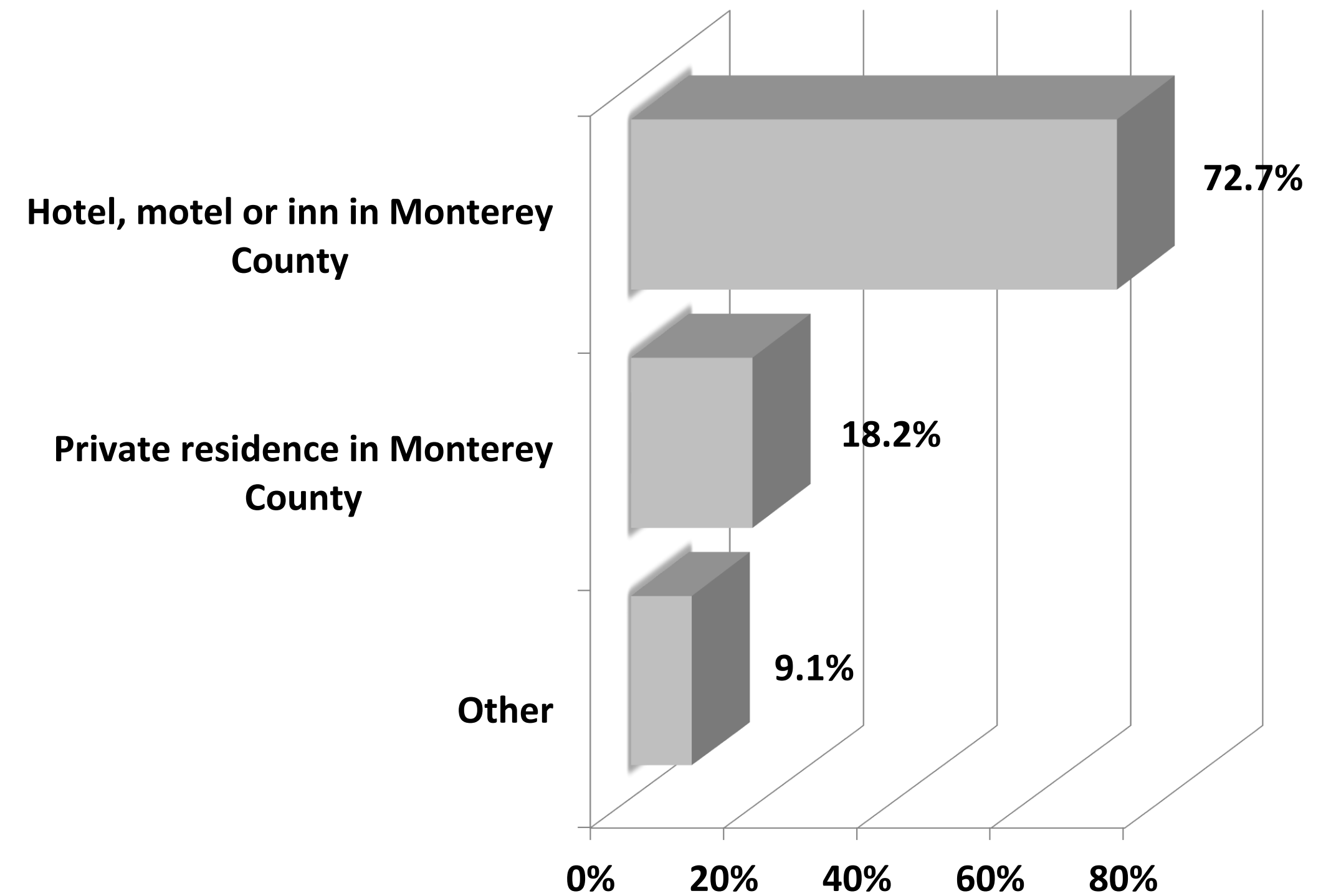


Overnight Visitor - Place of Stay

Over 70 percent of Airshow attendees surveyed who stayed overnight in Monterey County stayed in a hotel, motel or inn within Monterey County during their trip (72.7%), while 18.2 percent stayed in a private residence in Monterey County.

Question: Where did you (or will you) stay overnight? Base: Respondents who stayed overnight in Monterey County during their trip. 11 completed surveys.

Chart 4: Place of Stay

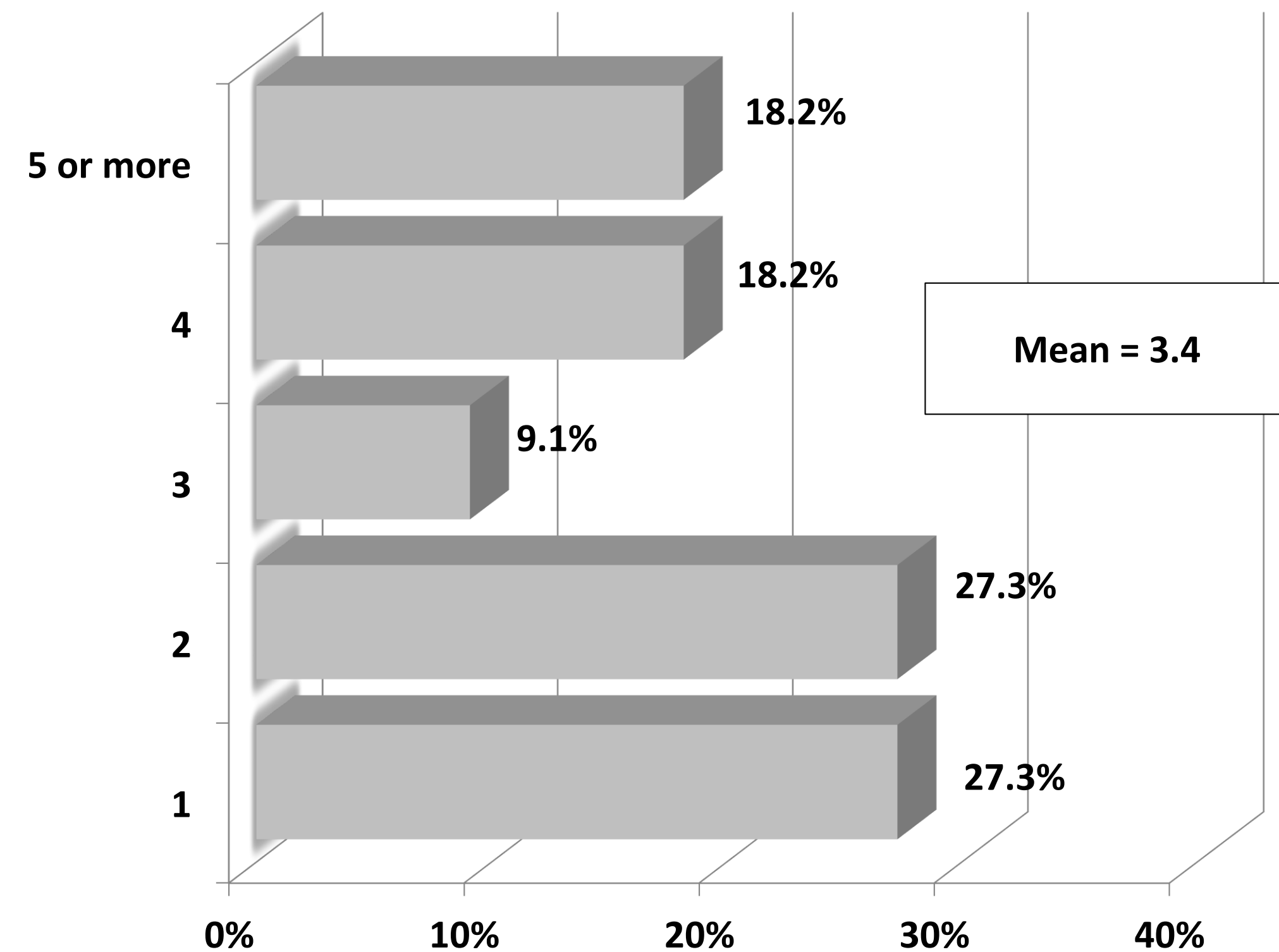


Overnight Visitor - Total Nights in Monterey County

On average, overnight visitors spent approximately 3.4 nights in Monterey County. The largest proportions of this group stayed one (27.3%) or two (27.3%) nights. 18.2 percent of Airshow attendees surveyed who live outside Monterey County stayed five or more nights.

Question: How many nights did you, or will you, stay in Monterey County?
Base: Respondents who stayed overnight in Monterey County during their trip. 11 completed surveys.

Chart 4b: Total Nights in Monterey County

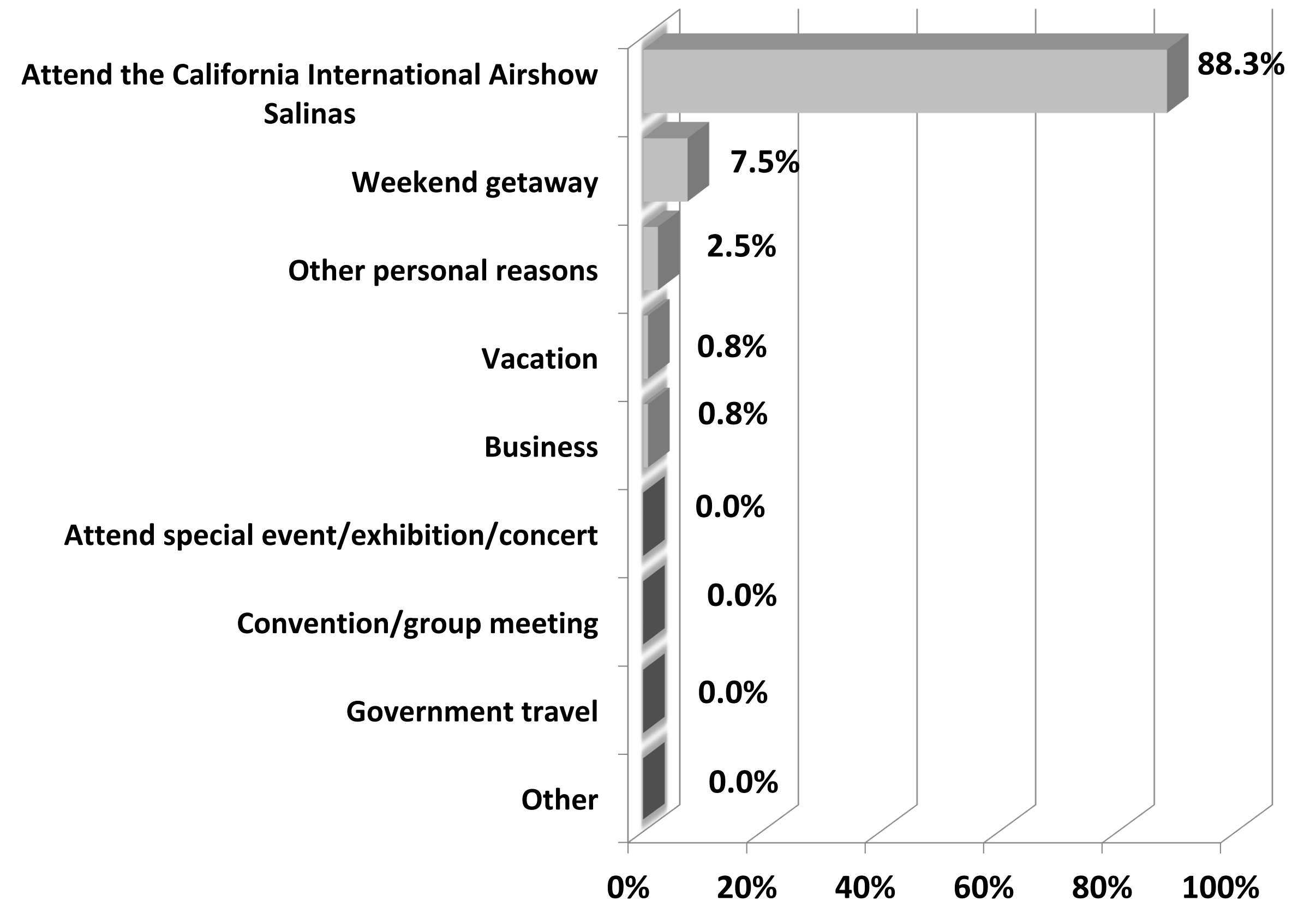


Reason for Visiting Monterey County

The majority of Airshow attendees surveyed who live outside Monterey County visited the city specifically to attend the Airshow (88.3%). This distinction is important, as spending by this group contributes to the total direct incremental spending used in the economic impact estimates presented earlier. Additionally, 7.5 percent reported coming to the area for a weekend getaway and another 2.5 percent visited for other personal reasons.

Question: What is your PRIMARY REASON for this visit Monterey County?
Base: Respondents who live outside of Monterey County. 120 completed surveys.

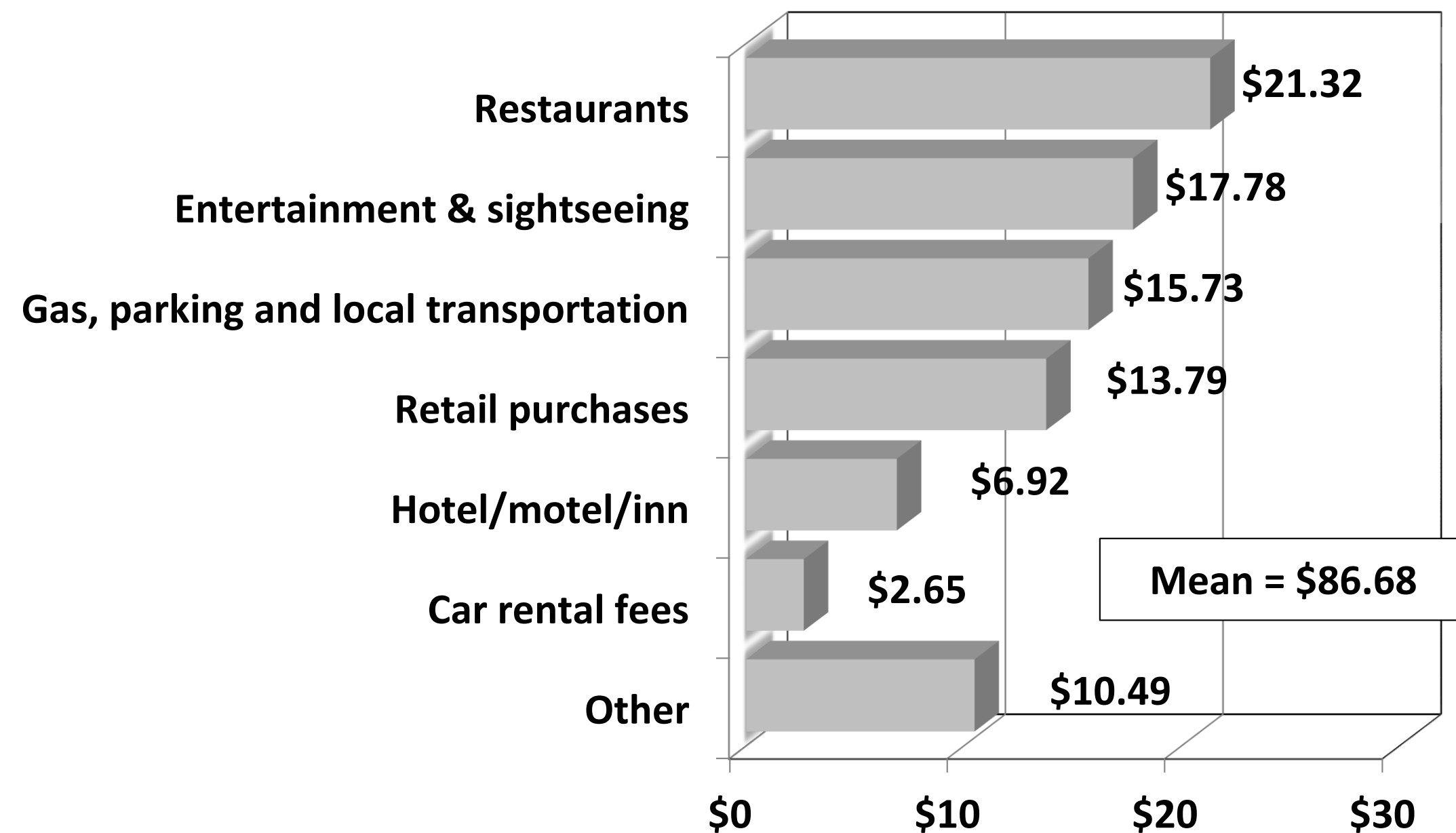
Chart 5: Reason for Visiting Monterey County



Spending in Monterey County

Airshow attendees who live outside Monterey County spent an average of \$86.68 per day while in Monterey. The largest shares of this spending went to restaurants (\$21.32), entertainment & sightseeing (\$17.78) and gas, parking, and local transportation (\$15.73). As shown in the table below, Airshow attendees staying overnight in Monterey County hotels represent the greatest visitor spending impact at \$452.14 per day.

Chart 6: Spending in Monterey County



Detail by Type of Visitor

	All Visitor	Day Tripper	All Overnight	Hotel Guest
Hotel/motel/inn	\$6.92	-	\$81.00	\$115.71
Restaurants	\$21.32	\$17.71	\$60.00	\$85.71
Retail purchases	\$13.79	\$7.22	\$84.00	\$105.71
Gas, parking and local transportation	\$17.78	\$13.93	\$59.00	\$67.14
Entertainment & sightseeing	\$2.65	\$1.50	\$15.00	\$21.43
Car rental fees	\$15.73	\$13.04	\$44.50	\$56.43
Other	\$10.49	\$11.64	\$0.00	\$0.00
Mean	\$88.68	\$65.04	\$343.50	\$452.14
Sample Size	88	25	63	32

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

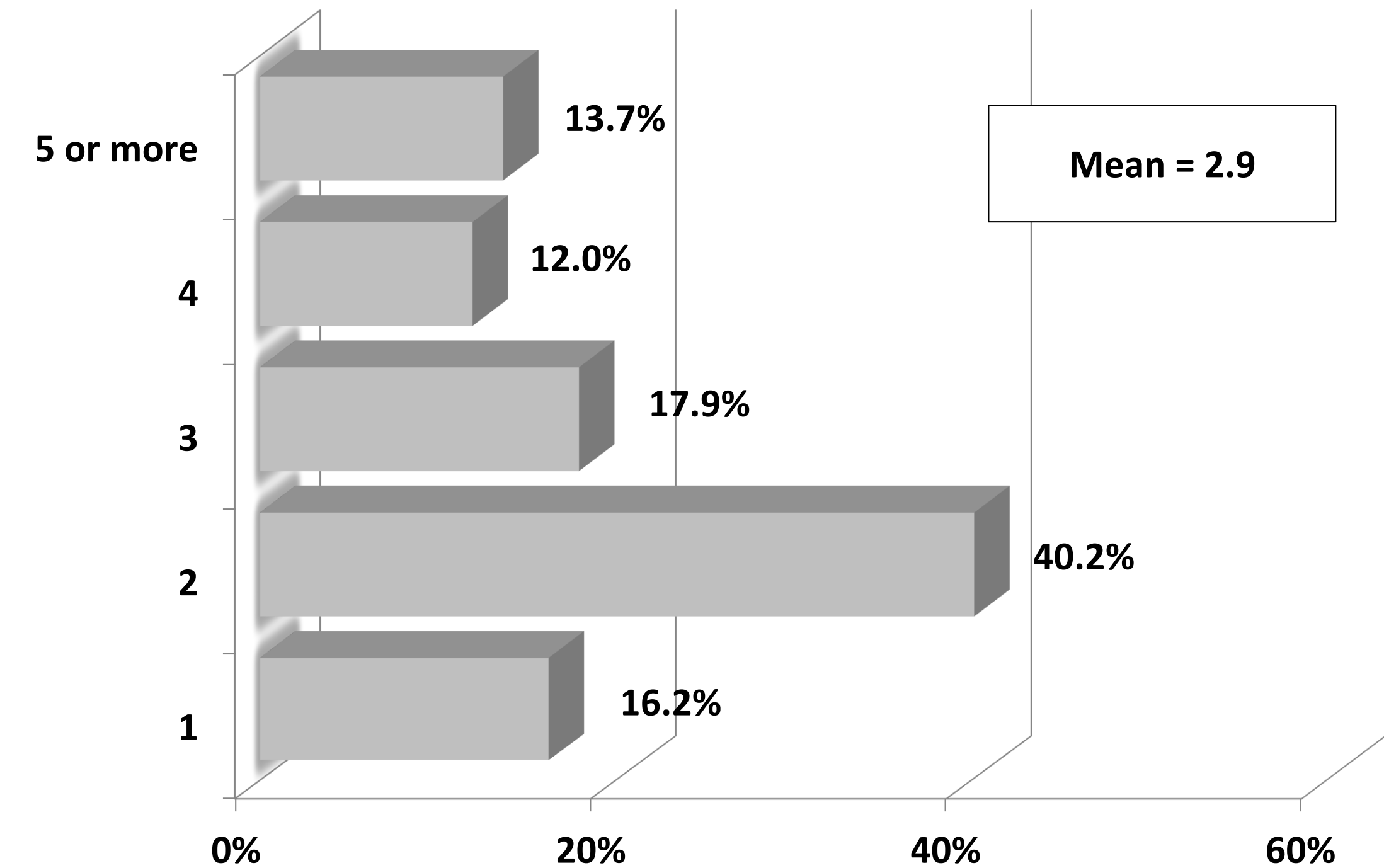
Base: Respondents who live outside of Monterey County. 117 completed surveys.

Attendees Covered by Spending

With an average of 2.9 people covered by the reported spending, the per person daily spending in Monterey County for Airshow attendees was approximately \$29.89.

Question: How many Airshow attendees did this spending cover? Base: Respondents who live outside of Monterey County. 117 completed surveys.

Chart 7: Attendees Covered by Spending

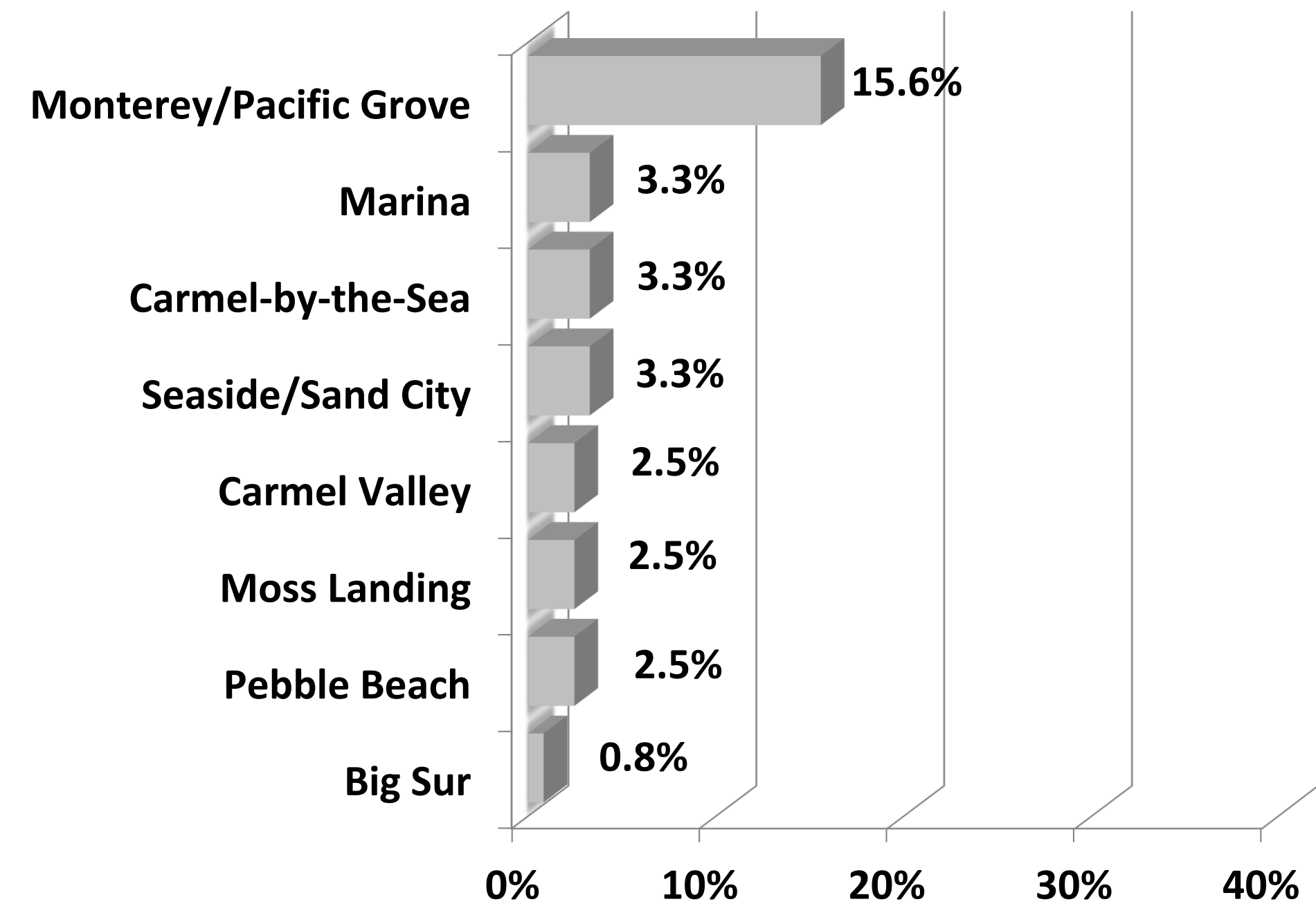


Areas Visited During Trip

When asked which other areas of the County they visited as a part of their trip to Monterey County for the Airshow, 15.6 percent of attendees surveyed reported also visiting Monterey/Pacific Grove. This was followed by Marina (3.3%), Carmel-by-the-Sea (3.3%) and Seaside/Sand City (3.3%).

Question: Which of these Monterey County areas did you visit on this trip? (Select all that apply) Base: Respondents who live outside of Monterey County. 122 completed surveys.

Chart 8: Areas Visited During Trip



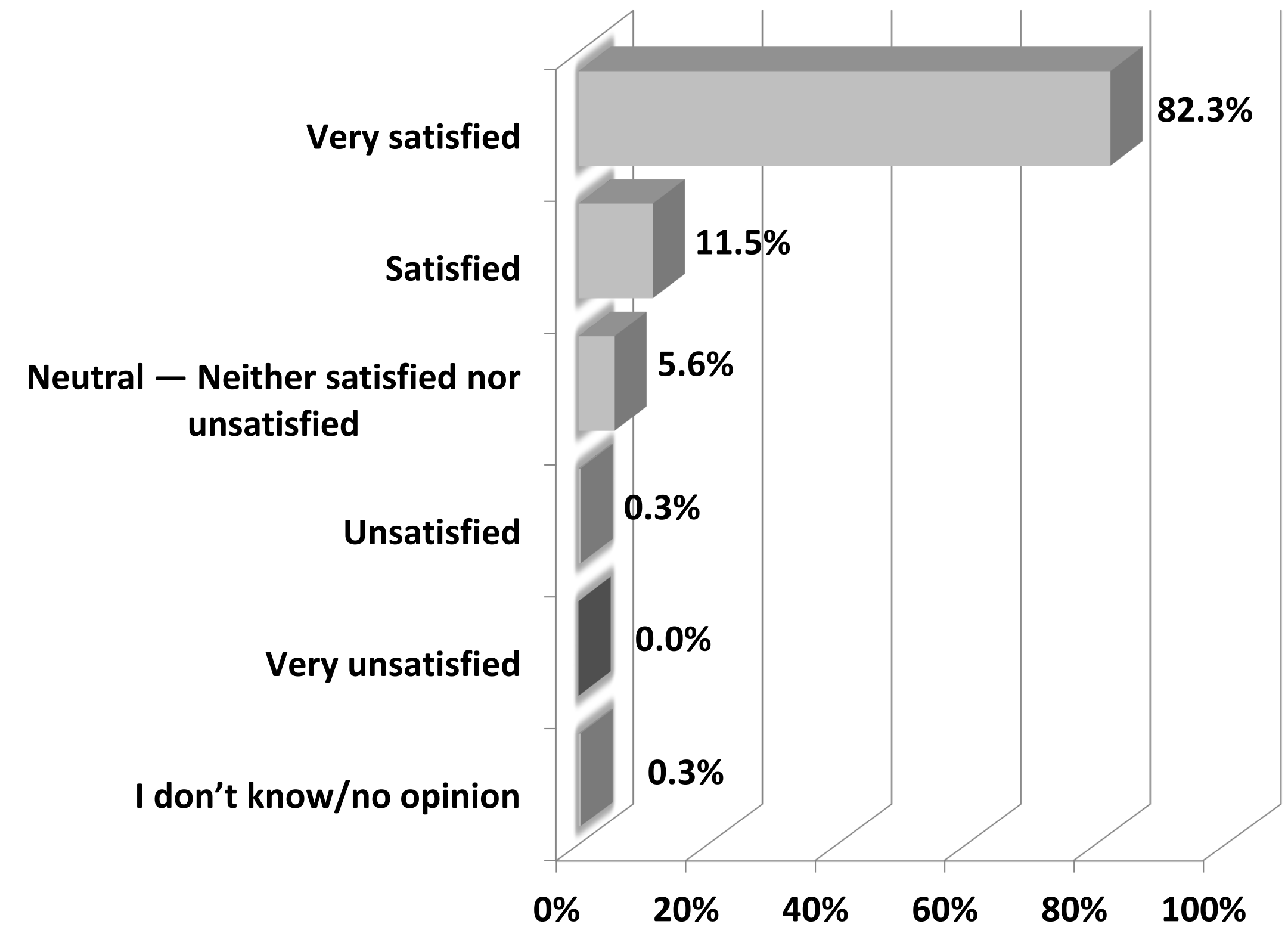
* Note event was in Salinas

Satisfaction with Airshow Experience

The California International Airshow 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 Airshow. Nine in ten attendees said they were “Satisfied” (11.5%) or “Very satisfied” (82.3%) with their experience.

Question: How satisfied are you with your experience at the California International Airshow Salinas? Base: All Respondents. 322 completed surveys.

Chart 9: Satisfaction With Airshow Experience

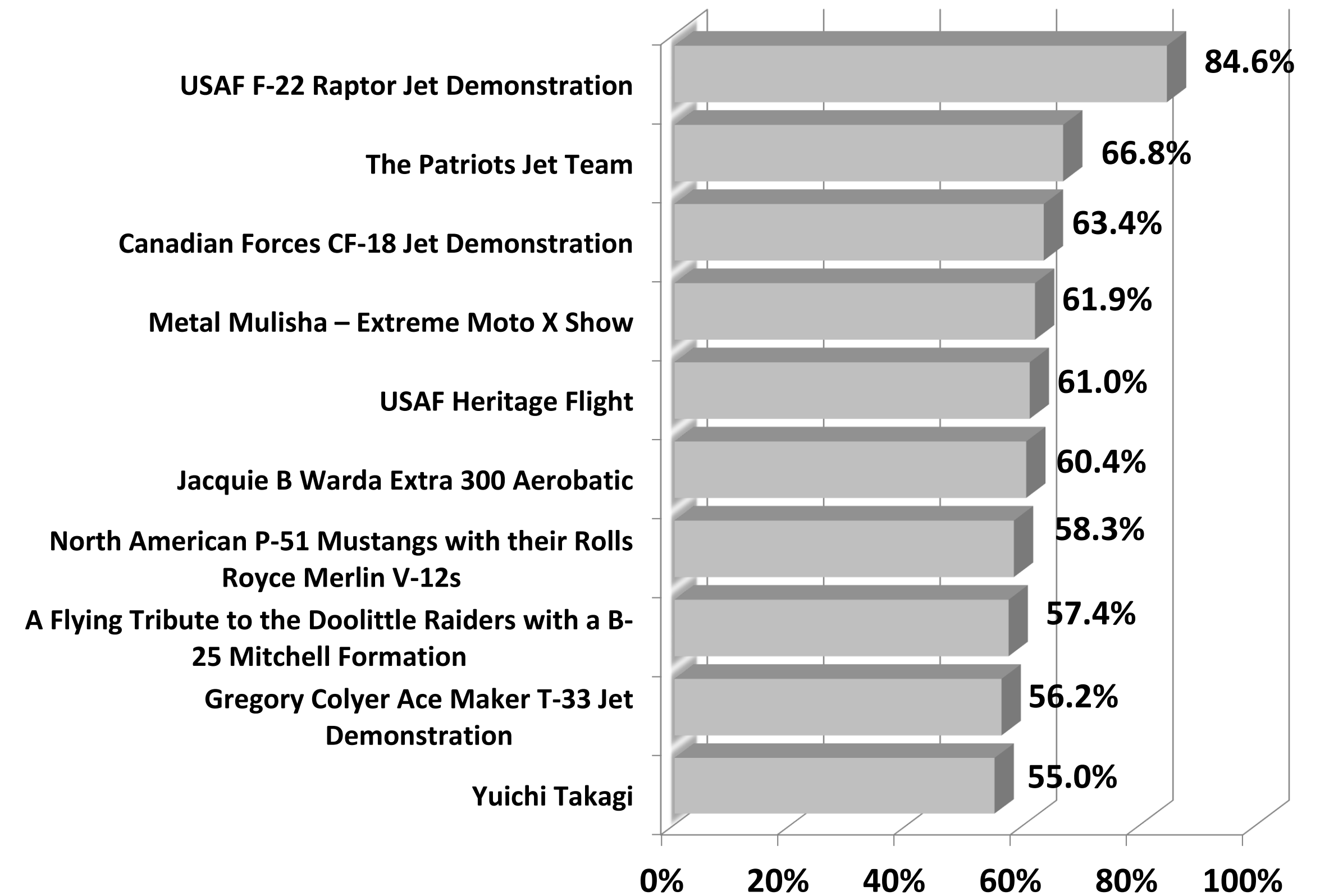


California International Airshow Events Attended

Airshow attendees were asked which events they attended or planned on attending. 85 percent said they would attend the USAF F-22 Raptor Jet Demonstration (84.6%). This was followed by the Patriots Jet Team (66.8%) and the Canadian Forces CF-18 Jet Demonstration (63.4%). The Metal Mulisha – Extreme Moto X Show and USAF Heritage Flight were the next most frequented events reported by respondents with 61.9 percent and 61.0 percent, respectively.

Question: Which of the following events did you or will you attend? (Check all that apply). Base: All Respondents. 331 completed surveys.

Chart 10: California International Airshow Events Attended

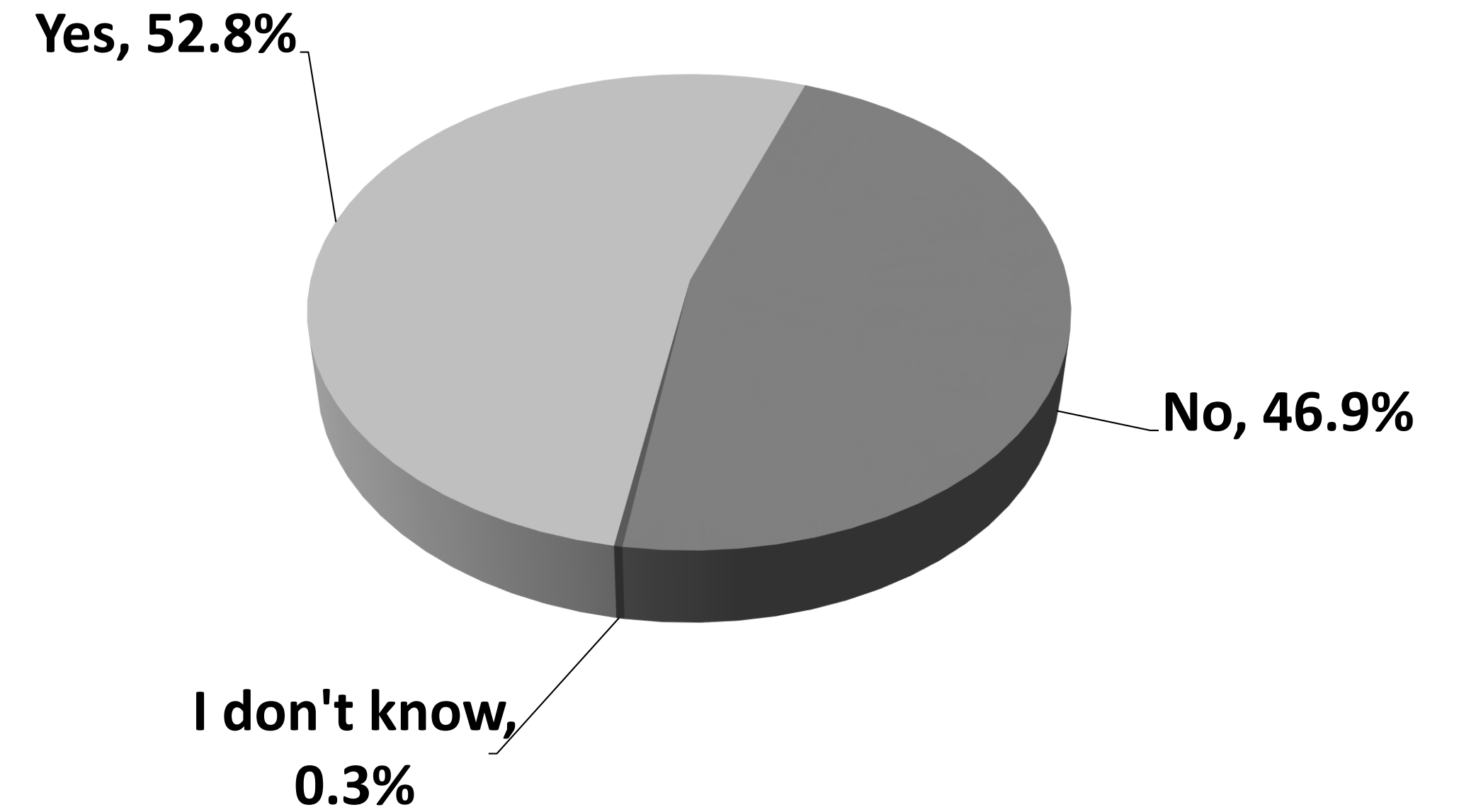


Children in Party

More than half of respondents attended the Airshow with children under the age of 18 (52.8%).

Question: Do you have children under 18 with you at the event today?
Base: All Respondents. 324 completed surveys.

Chart 11: Children in Party

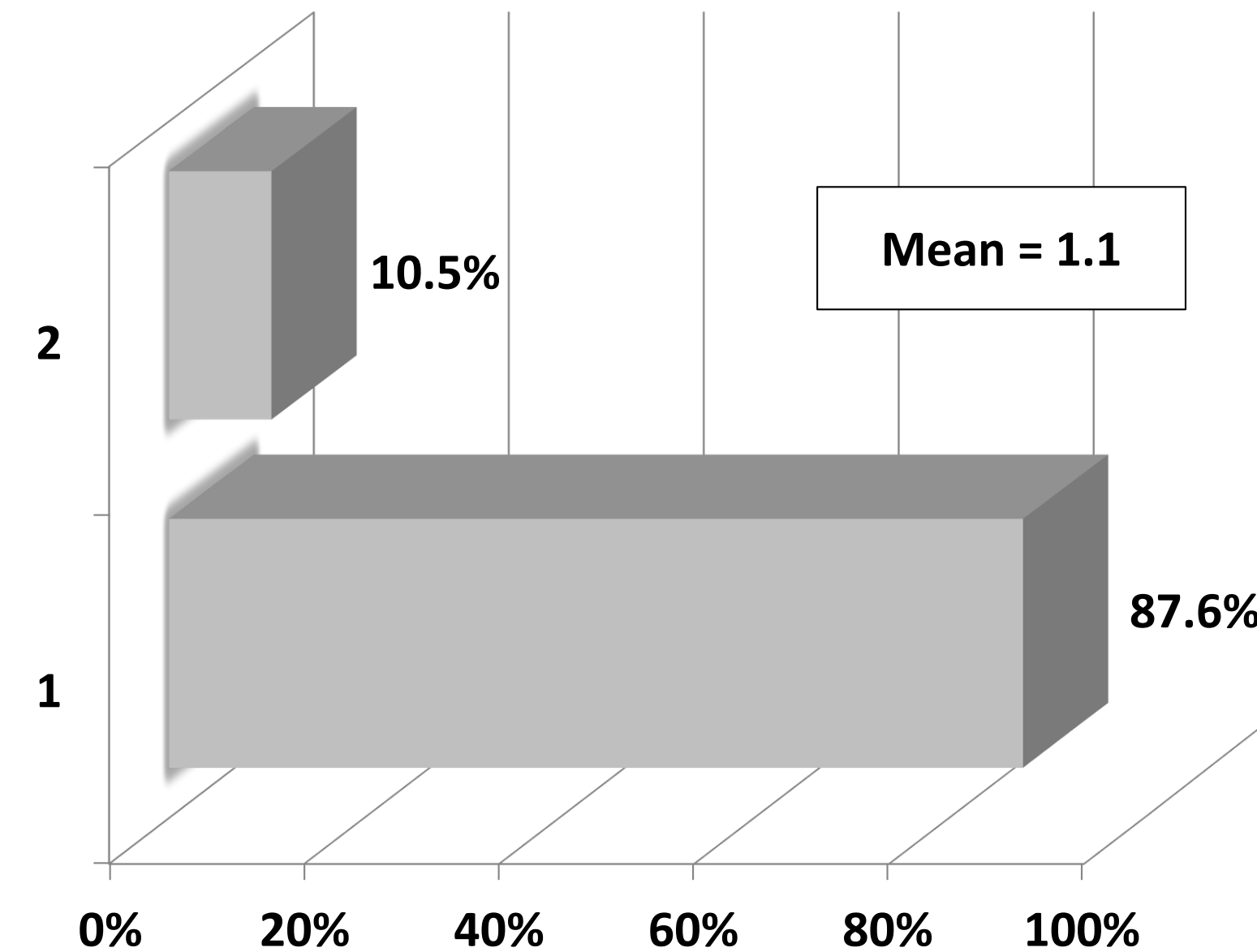


Days Spent at the Airshow

On average, attendees (including Monterey County residents) spend approximately 1.1 days at the Airshow. The majority of respondents spent one day at this year's Airshow (87.6%) and 10.5 percent attended the event for the full two days.

Question: How many days will you attend the California International Airshow Salinas? Base: All Respondents. 323 completed surveys.

Chart 12: Days Spent at the Airshow

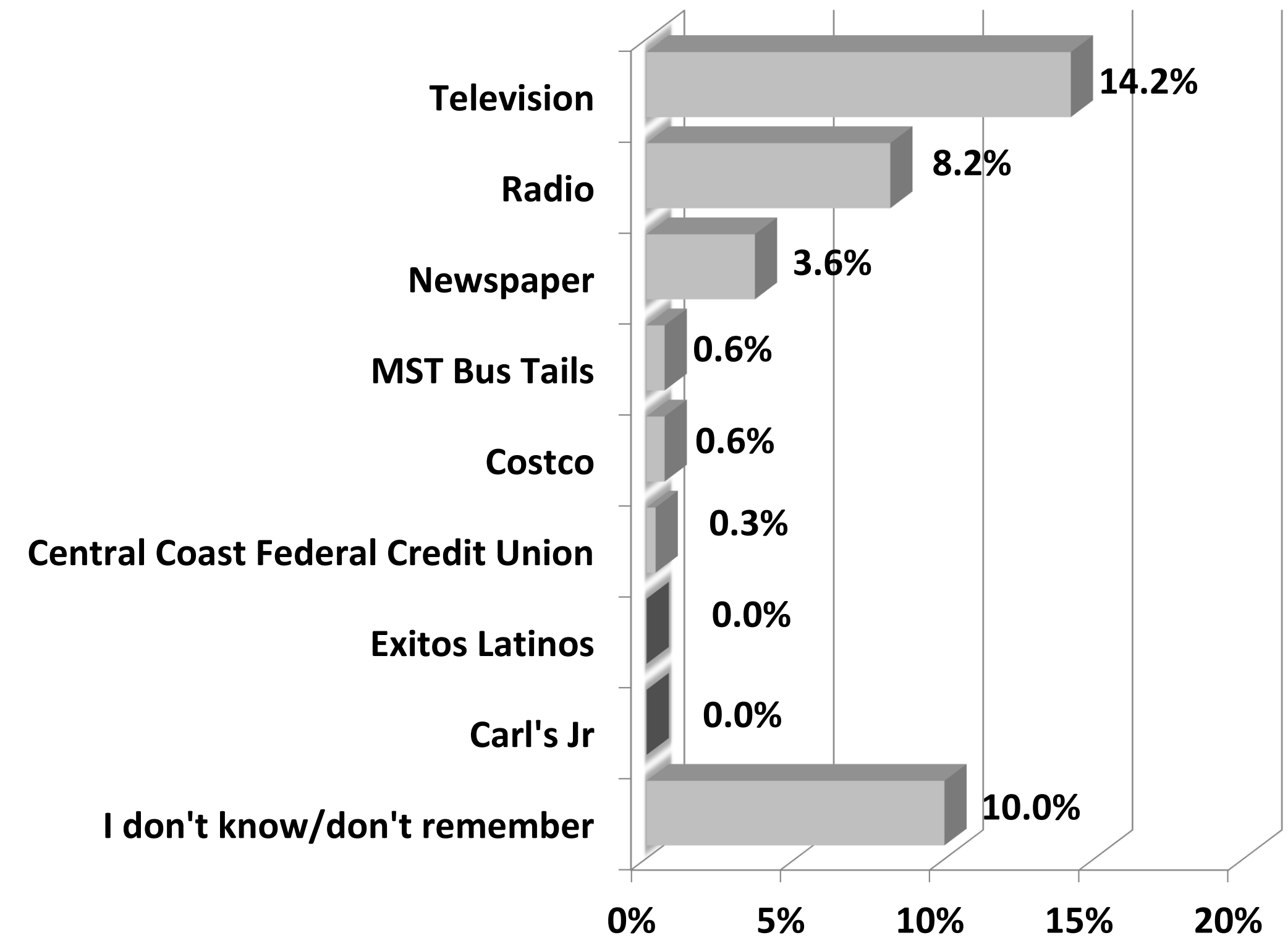


How Attendee Heard About Event

Airshow attendees were asked how they heard about the event. 14.2 percent learned about the Airshow from television advertisements and 8.2 percent heard about it on the radio. Another 3.6 reported hearing about the event via the newspaper. One-in-ten people were unsure about the source from which they heard about the Airshow.

Question: Where/how did you hear about the event? (Select all that apply).
Base: All Respondents. 331 completed surveys.

Chart 13: How Attendee Heard About Event

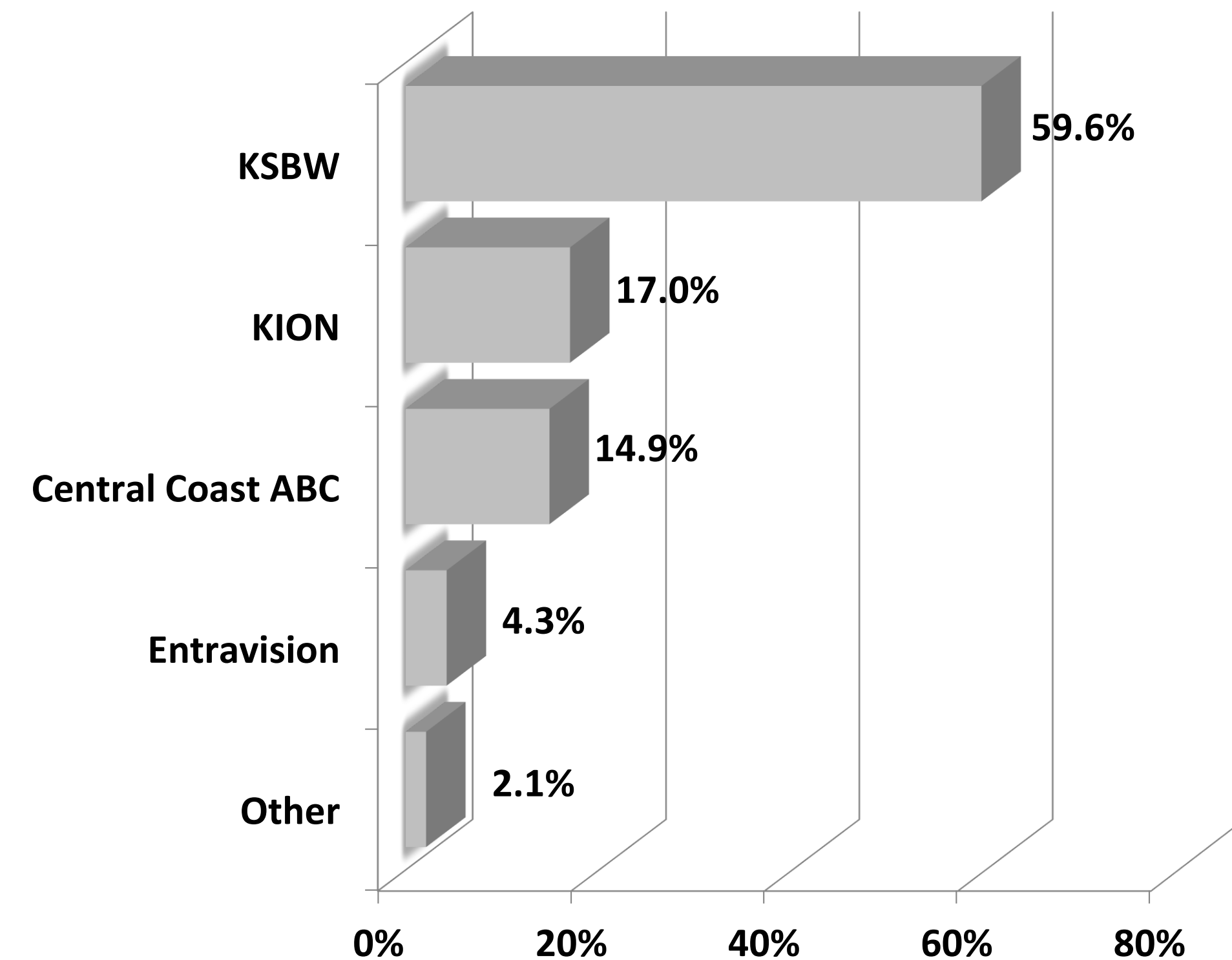


How Attendee Heard About Event – Television Sources

Of those who reported hearing about the Airshow on television, 59.6 percent listed KSBW as the station they heard it on. KION and Central Coast ABC were the next most reported stations, with 17.0 percent and 14.9 percent respectively.

Question: Which television station did you hear about the event from? (Select all that apply). Base: All Respondents. 47 completed surveys.

Chart 14: How Attendee Heard About Event – Television Sources

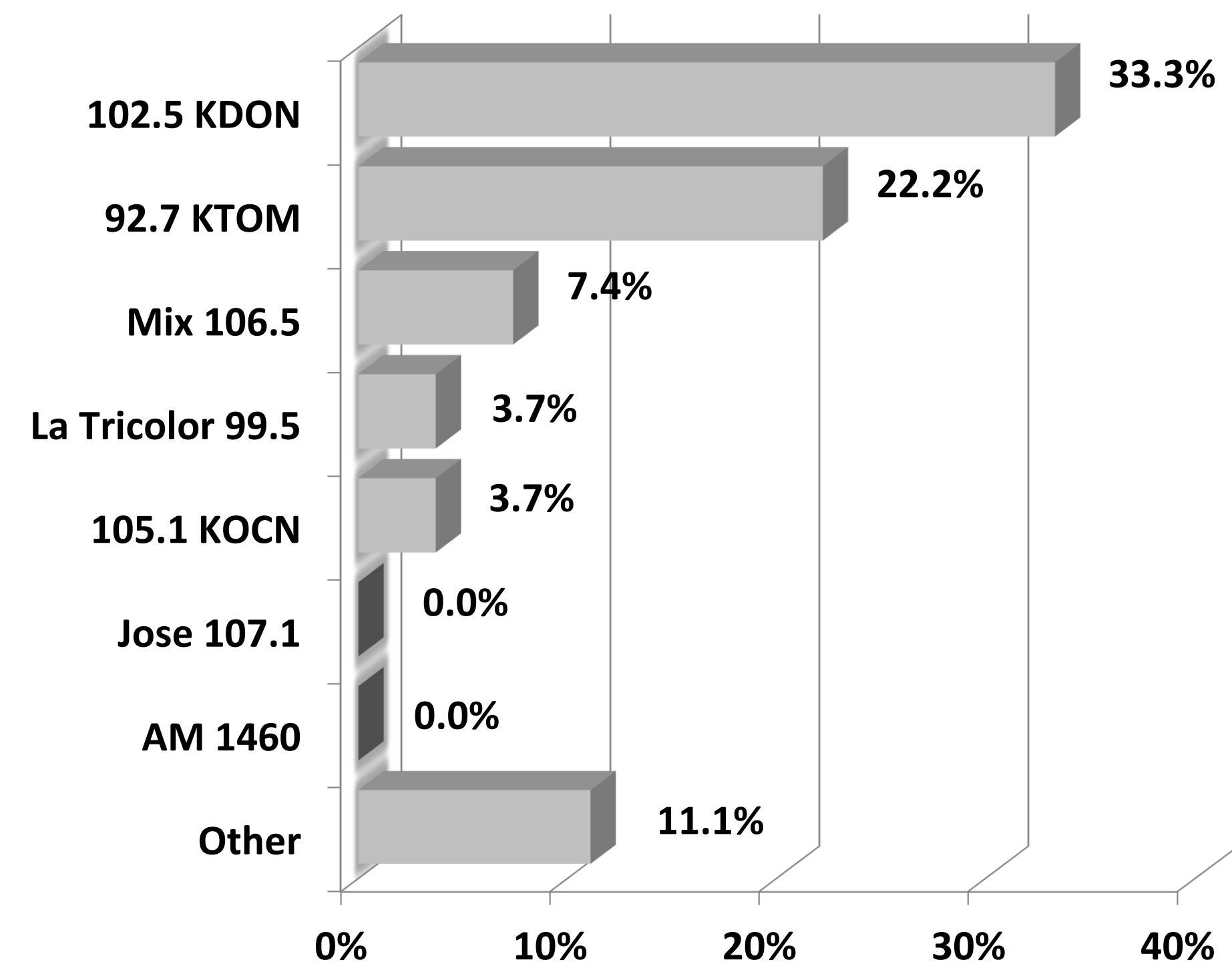


How Attendee Heard About Event – Radio Sources

The 8.2 percent of Airshow attendees who reported hearing about the event on the radio were asked which radio station they heard about it on. A third of that group listed 102.5 KDON as the station they heard about the event on. Another 22.2 percent heard about it on 92.7 KTOM and 7.4 percent reported Mix 106.5.

Question: Which radio station did you hear about the event from? (Select all that apply). Base: All Respondents. 27 completed surveys.

Chart 15: How Attendee Heard About Event – Radio Sources

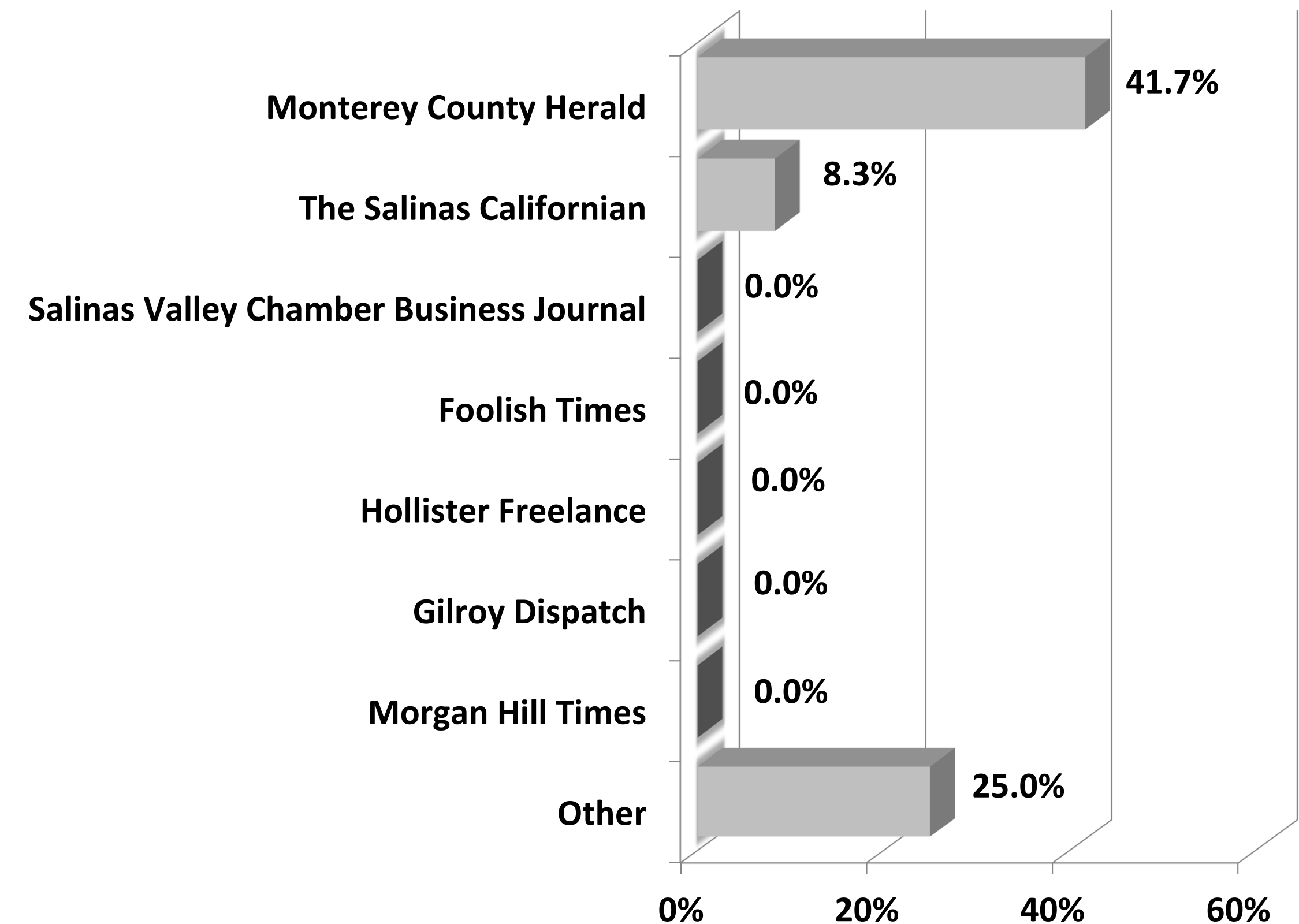


How Attendee Heard About Event – Newspaper Sources

Of the 3.6 percent who reported learning about the event via the newspaper, 41.7 percent listed the Monterey County Herald as the newspaper they read about it in. The Salinas Californian was mentioned by another 8.3 percent.

Question: Which newspaper did you hear about the event from? (Select all that apply). Base: All Respondents. 12 completed surveys.

Chart 16: How Attendee Heard About Event –Newspaper Sources





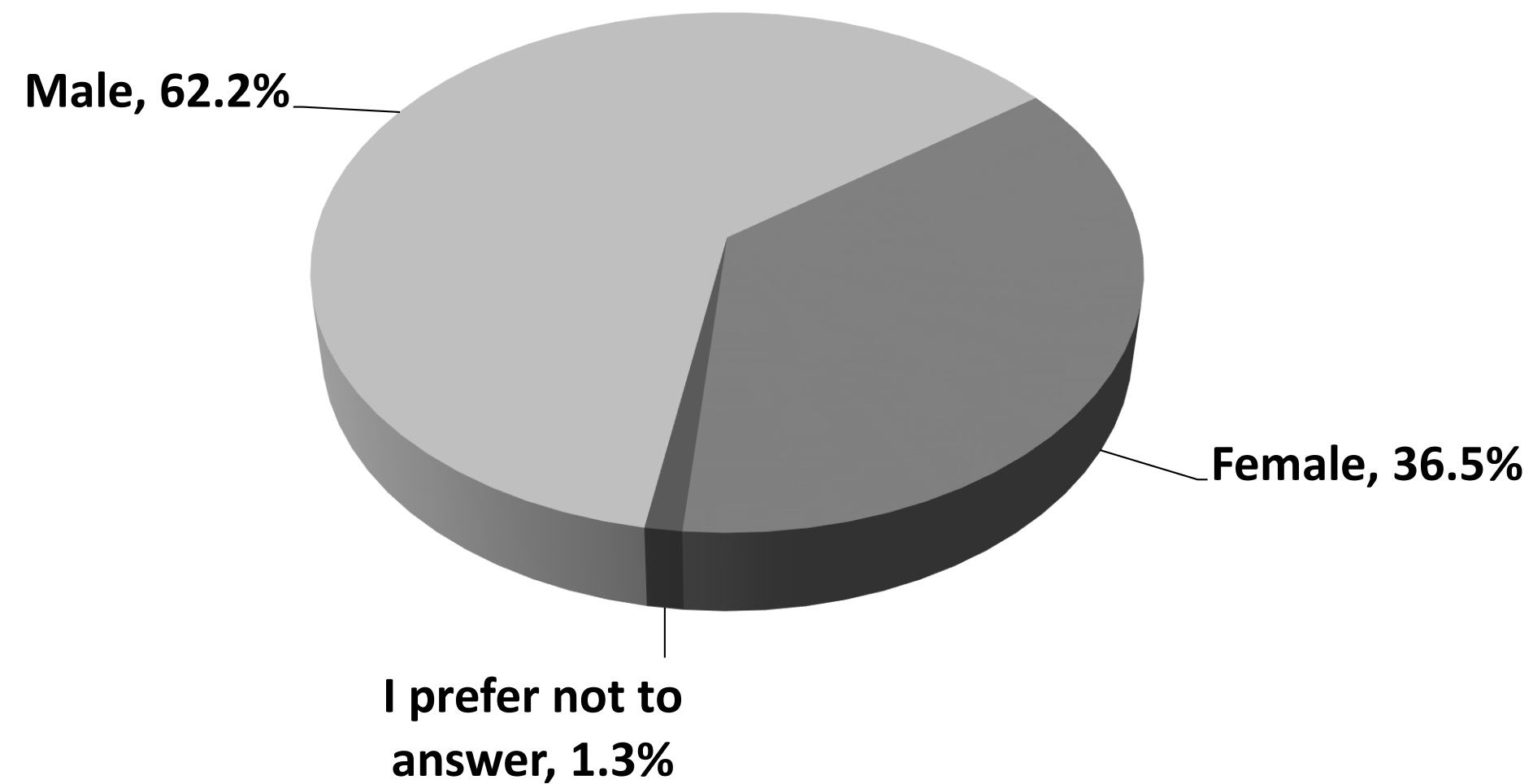
Sample Demographics



Gender

Survey respondents skewed male (62.2%).

Chart 17: Gender



Question: Are you?

Detail by Place of Residence

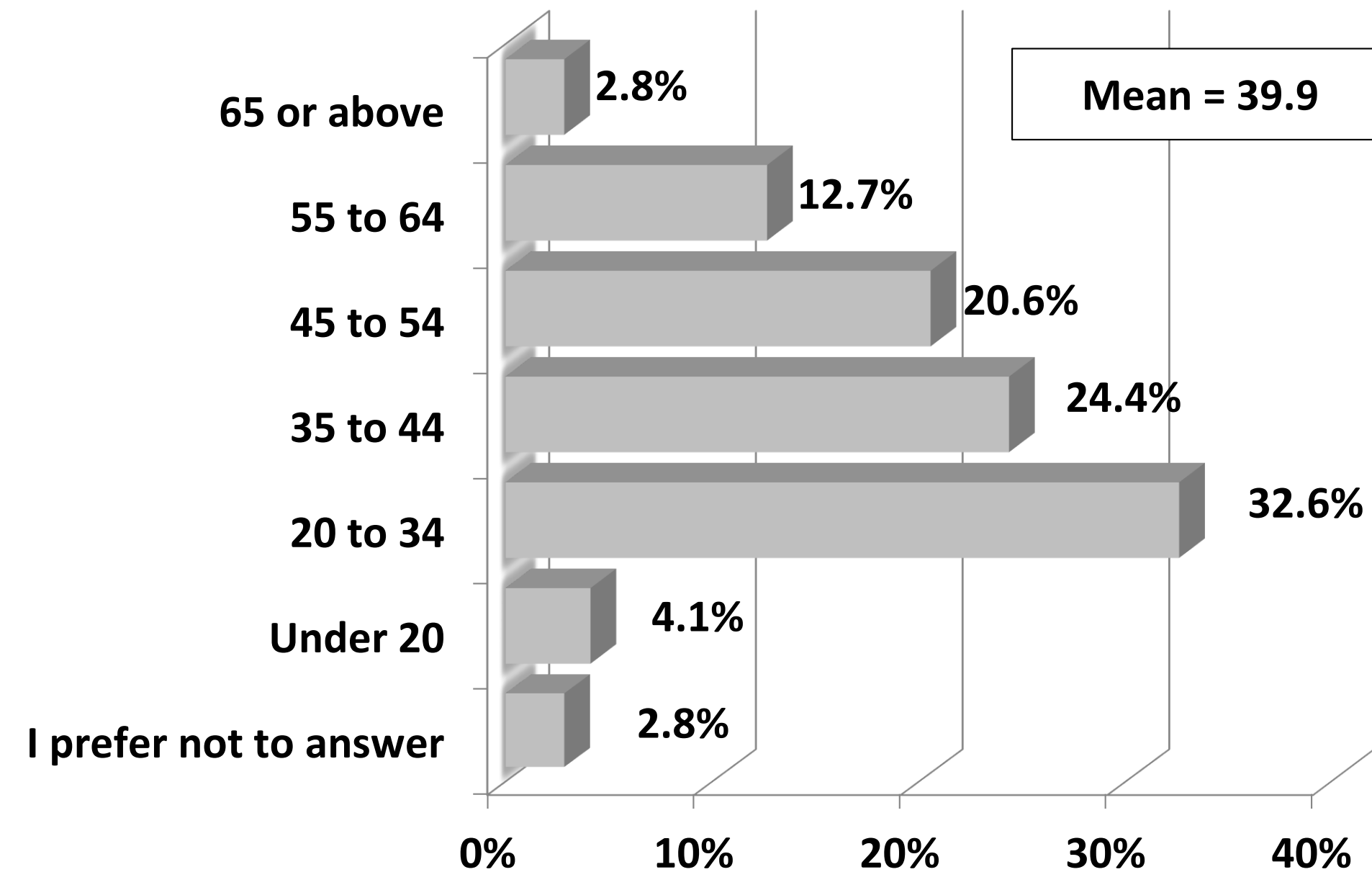
	All Respondents	Non Monterey County Residents
Male	62.2%	64.3%
Female	36.5%	34.8%
I prefer not to answer	1.3%	0.9%
Sample Size	312	115

Base: All respondents. 312 completed surveys

Age

The average age of Airshow attendees surveyed was 39.9 years.

Chart 18: Age



Detail by Place of Residence

	All Respondents	Non Monterey County Residents
65 or above	2.8%	4.2%
55 to 64	12.7%	14.4%
45 to 54	20.6%	21.2%
35 to 44	24.4%	22.0%
20 to 34	32.6%	33.1%
Under 20	4.1%	1.7%
I prefer not to answer	2.8%	3.4%
Mean	39.9	41.1
Sample Size	316	118

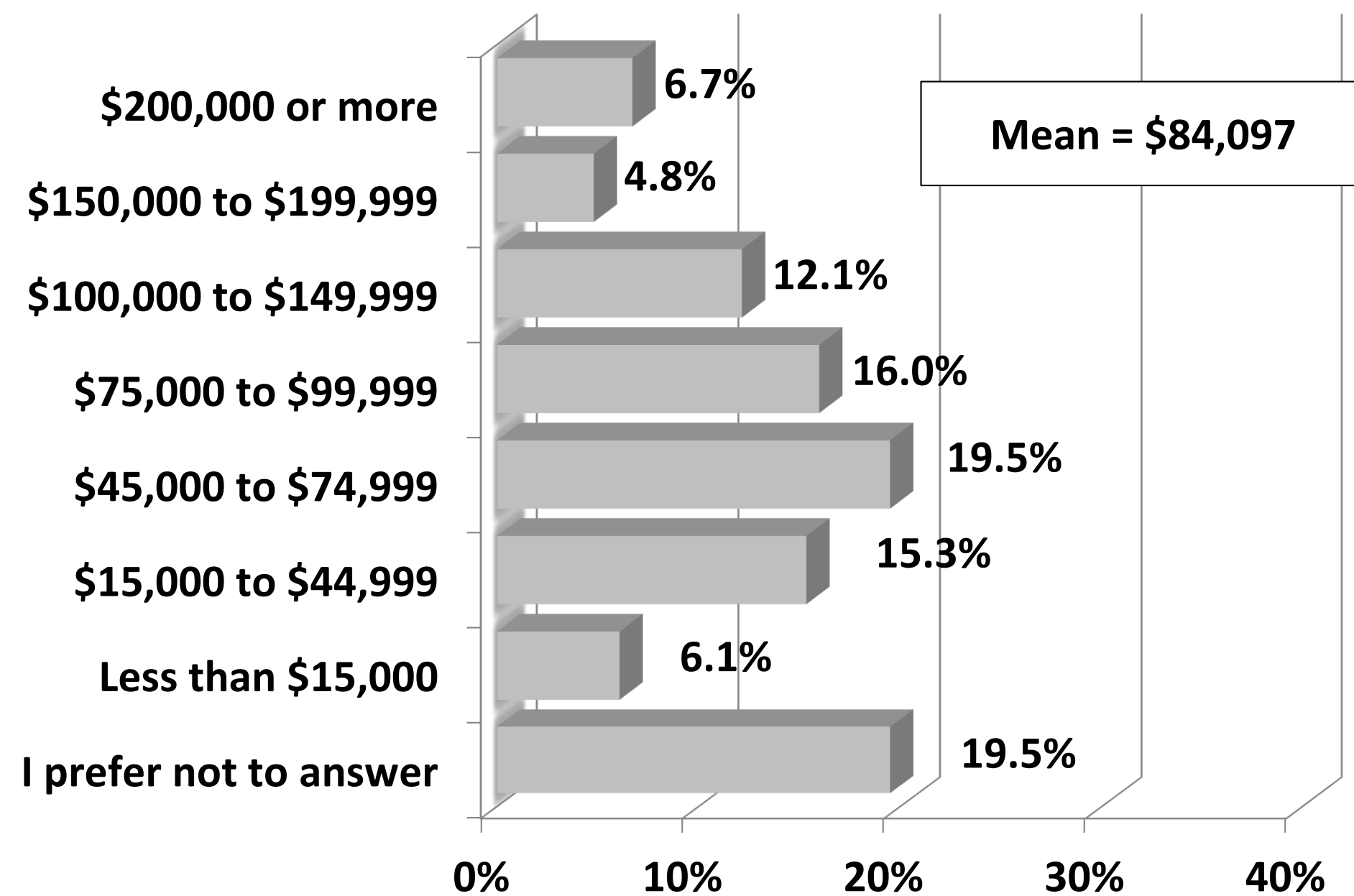
Question: Which is your age?

Base: All respondents. 316 completed surveys

Annual Household Income

The average annual household income of Airshow attendees surveyed is \$84,097.

Chart 19: Annual Household Income



Detail by Place of Residence

	All Respondents	Non Monterey County Residents
\$200,000 or more	6.7%	10.4%
\$150,000 to \$199,999	4.8%	7.8%
\$100,000 to \$149,999	12.1%	8.7%
\$75,000 to \$99,999	16.0%	18.3%
\$45,000 to \$74,999	19.5%	20.0%
\$15,000 to \$44,999	15.3%	10.4%
Less than \$15,000	6.1%	2.6%
I prefer not to answer	19.5%	21.7%
Mean	\$84,097	\$98,055
Sample Size	313	115

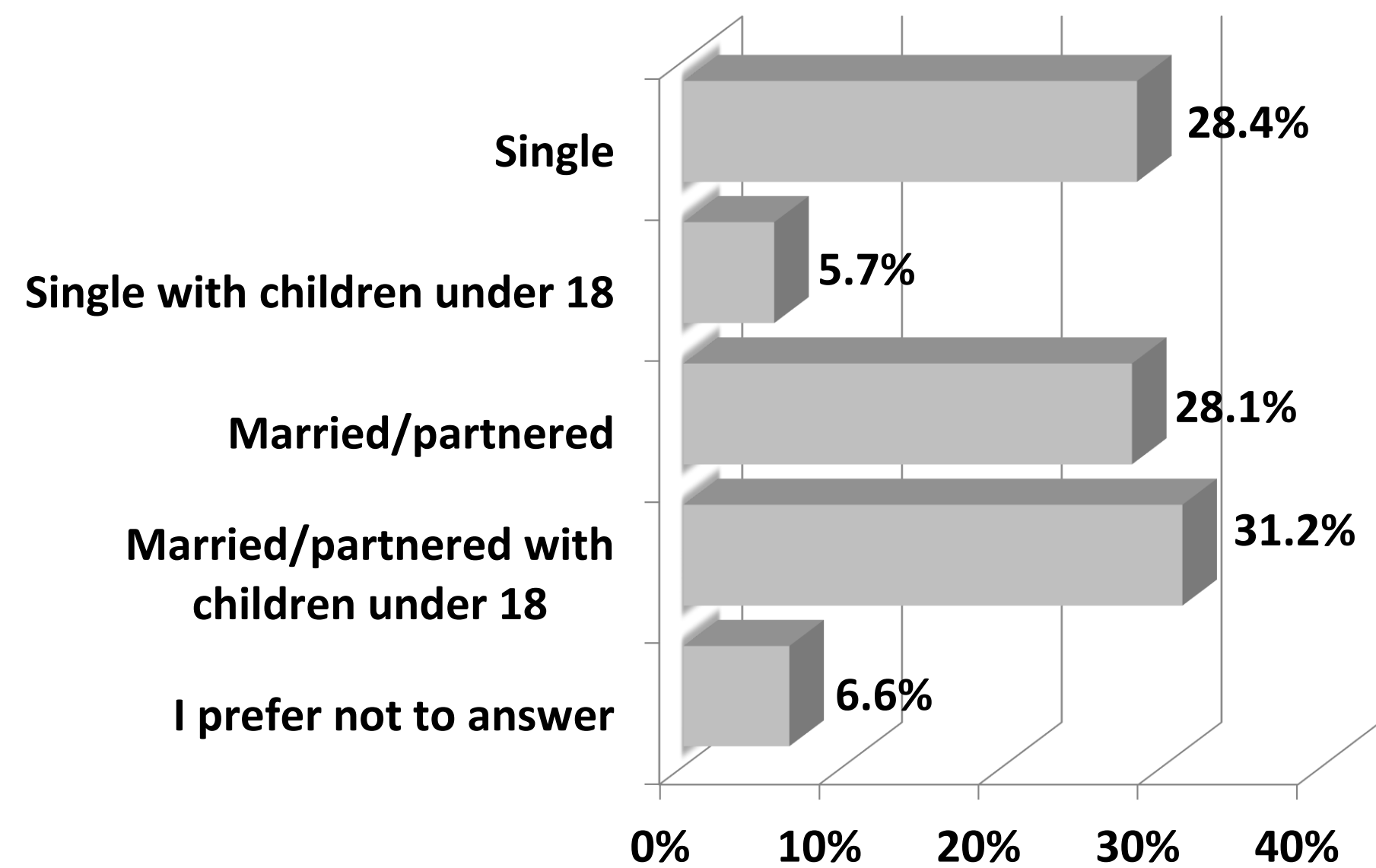
Question: Which of the following best describes the combined annual income of all members of your household?

Base: All respondents. 313 completed surveys

Marital Status

60 percent of respondents are married (59.3%), while 31.4 percent are single. 36.9 percent have children under age 18.

Chart 20: Marital Status



Detail by Place of Residence

	All Respondents	Non Monterey County Residents
Single	28.4%	31.4%
Single with children under 18	5.7%	2.5%
Married/partnered	28.1%	30.5%
Married/partnered with children under 18	31.2%	28.0%
I prefer not to answer	6.6%	7.6%
Sample Size	317	118

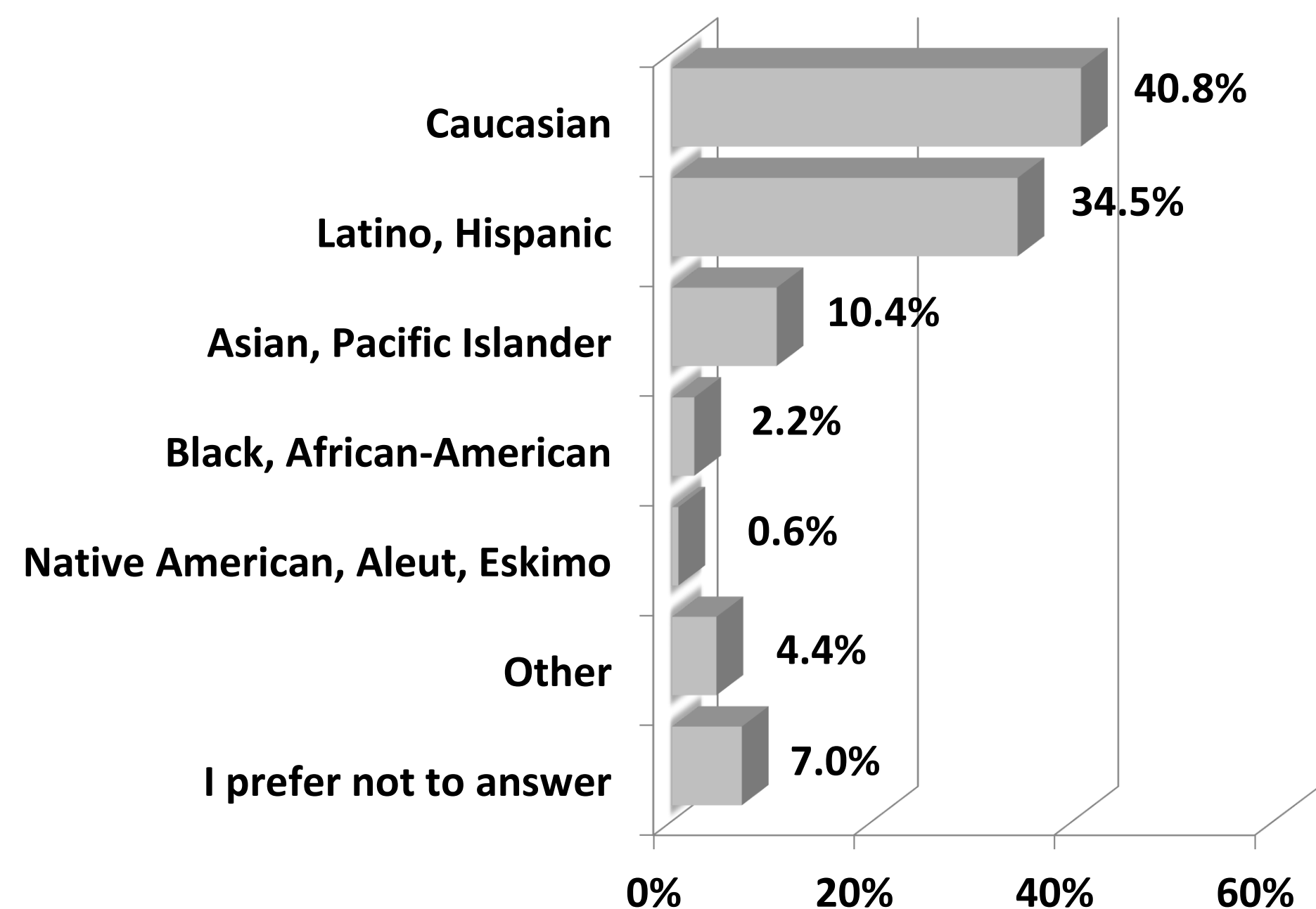
Question: Which of the following best describes your current marital status?

Base: All respondents. 317 completed surveys

Ethnicity

While 40.8 percent of respondents identify as Caucasian, 34.5 percent identify as Latino/Hispanic and 10.4 percent as Asian/Pacific Islander.

Chart 21: Ethnicity



Question: Which best describes your ethnicity?

Detail by Place of Residence

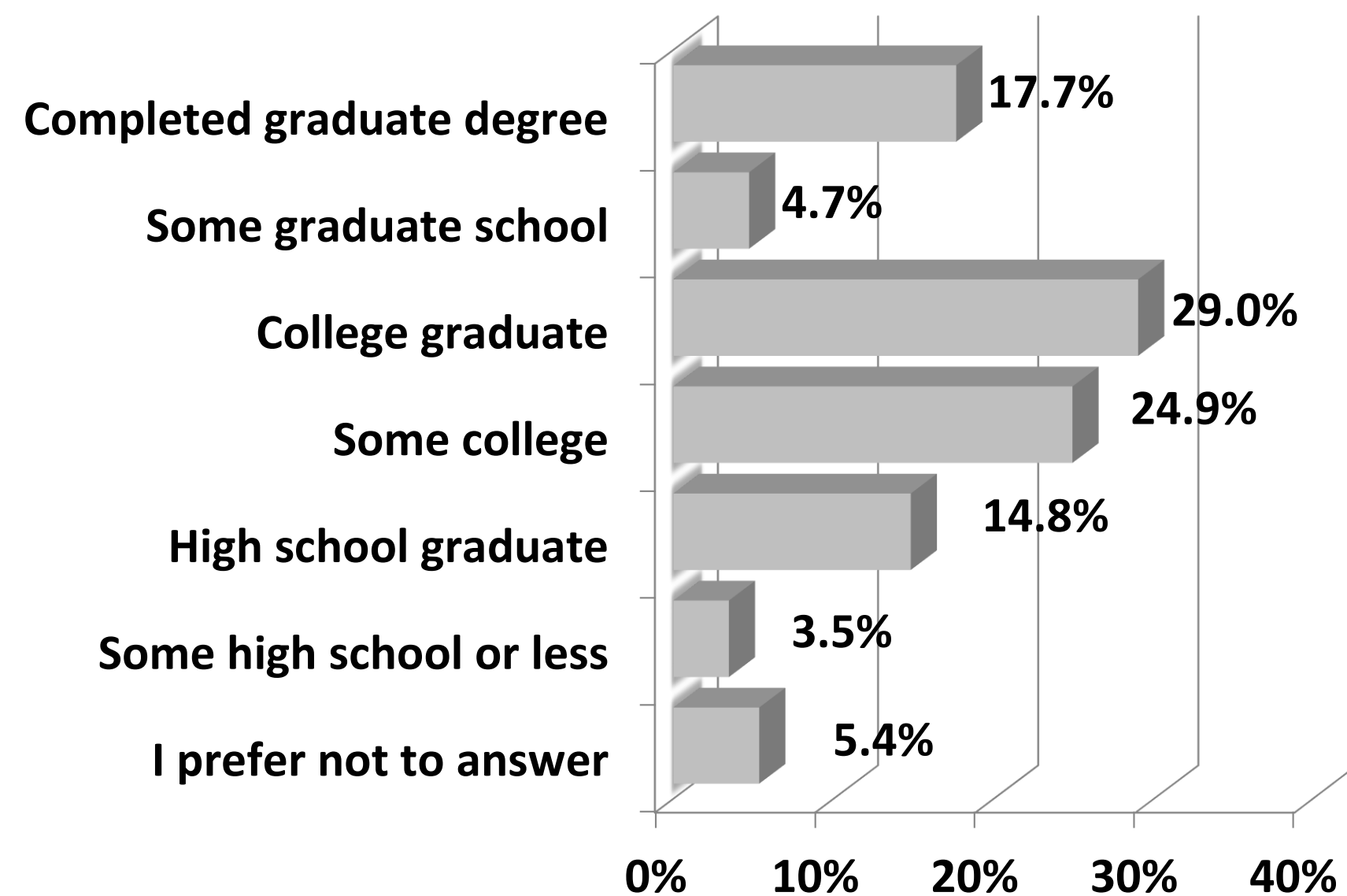
	All Respondents	Non Monterey County Residents
Caucasian	40.8%	48.3%
Latino, Hispanic	34.5%	19.5%
Asian, Pacific Islander	10.4%	16.1%
Black, African-American	2.2%	0.8%
Native American, Aleut, Eskimo	0.6%	1.7%
Other	4.4%	2.5%
I prefer not to answer	7.0%	11.0%
Sample Size	316	118

Base: All respondents. 316 completed surveys

Education

51.4 percent of survey respondents have a bachelors degree, including 17.7 percent who hold a graduate degree.

Chart 22: Education



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	17.7%	17.8%
Some graduate school	4.7%	3.4%
College graduate	29.0%	35.6%
Some college	24.9%	28.0%
High school graduate	14.8%	8.5%
Some high school or less	3.5%	0.0%
I prefer not to answer	5.4%	6.8%
Sample Size	317	118

Base: All respondents. 317 completed surveys