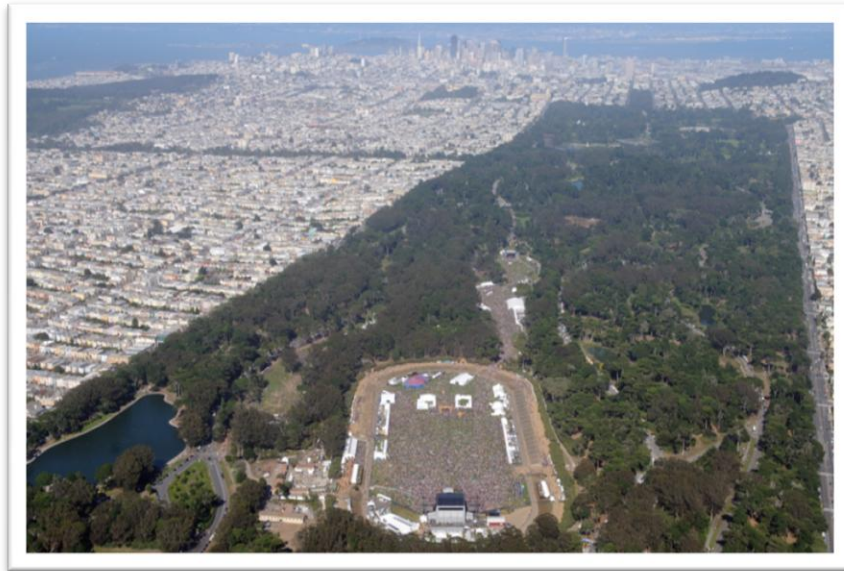


**Economic Impact of the 2011
Outside Lands Music and Arts Festival
on the City of San Francisco and the Bay Area**



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Another Planet Entertainment*

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The purpose of this study was to determine the economic impact on the City of San Francisco and the surrounding Bay Area from attendee spending related to the Outside Lands Music and Arts Festival (OSL) held in Golden Gate Park, San Francisco, August 12-14, 2011. Data came from 3,551 respondents who completed an online survey about their attendance and spending during the festival.

Sales impact on the City of San Francisco was \$60,641,880, while for the entire Bay Area it was \$67,275,280.

Results

- 72.7% of respondents to the survey lived outside of the City of San Francisco (32% from CA but outside the Bay Area)
- 27.3% were San Francisco residents
- 83% of non-residents stated OSL was the most important reason for their coming to SF
- 97% were aware of OSL prior to leaving home, and 80% stayed overnight outside of their home an average of 3.8 nights on the trip
- 89% of those staying overnight spent at least one night in San Francisco and the average number of nights in the city was 2.9
- Food/beverages and lodging were the two largest expenditure categories, after transportation.
- The gender of respondents to the survey was almost perfectly split 49.5% male and 50.5 % female.

A very conservative approach was utilized to determine economic impact of OSL on San Francisco and the Bay Area. First, resident spending was excluded, as was spending by those not aware of OSL prior to arrival in the Bay Area.

Utilizing this data the total direct expenditures from the OSL Festival in San Francisco were estimated to be \$27,072,270. Spending in the Bay Area outside of SF was \$2,961,340. This resulted in total direct expenditures in the entire Bay Area of \$30,033,610.

The total economic impacts of direct expenditures from a festival can be measured in terms of increased regional sales, personal income and jobs. Sales impact is sum of direct expenditures, plus indirect and induced spending in the region. Sales are calculated by applying a multiplier to direct expenditures. The level of multiplier is dependent on the robustness and capture rates of the regional economy. Large well integrated economies, like those in the Bay Area, have a much higher multiplier than rural communities.

Location Of Spending Impact	Sales
In San Francisco	\$ 60,641,880

Direct expenditures from OSL were utilized to estimate the economic impact on San Francisco and the entire Bay Area. A key type of data is respondent home residence this is later utilized in the calculation of economic impact shown in the table below.

Respondent Home Residence	Percent
San Francisco	27.3 %
Bay Area Outside San Francisco	22.8 %
California Outside Bay Area	31.8 %
USA Outside of California	16.3 %
Other Country	1.9 %

* Please note that the Bay Area outside of San Francisco (22.8%) constitutes the six counties outside of San Francisco.

Non-resident respondents were asked if they were aware of OSL before going to San Francisco on their trip.

Aware of OSL Prior to Visit	Valid Percent
Yes	96.6 %
No	3.4 %

Stayed Overnight Outside of Home	Valid Percent
Yes	80.3 %
No	19.7 %

Distribution of Nights in San Francisco	Avg. # of Nights
Total Mean Number of Nights	2.9

Finally, an estimate of new jobs, in this case mostly short term jobs, was determined by applying a multiplier of 25.2 jobs per million dollars in sales. This level of multiplier is consistent with those used in other studies of multiday events throughout the country.

Location Of Spending Impact	FTE Jobs *
Total in San Francisco	683

*Full time equivalent jobs. In the case of a 3 day event there are more short term and part time jobs created.