

2011 SAN DIEGO BEER WEEK ROOM NIGHT ANALYSIS

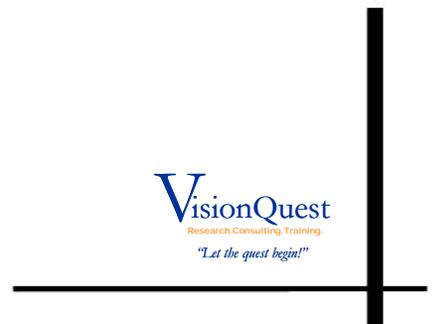


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I. Executive Summary

The following report is a summary of the room nights generated in proximity to Tourism Marketing District (TMD) hotel areas during 2011 Beer Week events. San Diego Beer Week consists of a series of some 542 independent events which took place from November 4 through November 13, 2011. The results of this analysis were generated using a web-based survey of attendees as well as intercept interviews conducted at 17 events of varying sizes during Beer Week. It is important to note that only those attendees staying in a hotel, who came specifically for Beer Week events, were included in the analysis.

The results indicate that an estimated 3,612 room nights were generated as a result of Beer Week events. Using the TMD standard ADR of \$129.93, this yielded a total of \$469,307 in additional hotel revenue during the Beer Week period. Using the TMD investment of \$74,999.00 the return on investment is approximately 6.26:1.

1. Summary Chart

Study	Room Nights	Rate	Total
Web Survey	139	\$129.93	\$18,060.00*
Intercept Surveys	3,473	\$129.93	\$451,247.00*
Total	3,612	\$129.93	\$469,307.00

*Rounded

II. Data Collection Methodology

Two data collection processes were used to determine room nights in TMD area hotels generated during San Diego Beer Week. The first was an online survey conducted by Advanced Reservation Systems Inc.(ARES), and the second was an intercept interview process conducted at events over the course of the week.

1. Web Survey

- The first data collection process was an online survey conducted by Advanced Reservation Systems Inc. (ARES) through the Beer Week web site. As part of event ticket sales, respondents were asked 7 questions regarding their home location, if Beer Week was the main purpose of their stay, if they were staying in a hotel, where it was located, and room numbers and nights for their stay.
- A total of 1536 (+1440 from 2010) respondents visited the site and completed the survey. The responses were then filtered based on two criteria. First, only surveys from attendees staying in a hotel were included and second, only responses from those whose stay was a direct result of Beer Week activities. Using these conditions, a total of 55 usable responses resulted (< 1%).
- It appears that only a small number of attendees use the website to book their hotel rooms. To accurately capture hotel room nights, intercept interviews were conducted to compliment the web data.

2. Intercept Surveys

- San Diego Beer Week consists of over 542 events taking place over a 9 day period. These events can be sorted into three broad categories by size:

Event Size	Attendees	Total Events
Large	Over 350	3
Medium	100-250	7
Small	1-99	532
Total		542

- To assess room nights, an intercept-survey of attendees was conducted during 17 events. This consisted of 3 large events, 7 medium sized events and 7 small events. The aim of the survey was to identify whether or not attendees were staying in hotels in the TMD area and if San Diego Beer Week was the primary reason for their stay. The same questions used on the web survey were used for this process with the addition of 2 items. Each respondent was asked if they had previously answered hotel-related questions online during their ticket sales. This allowed removal of any responses that were already captured. In addition, respondents were asked how many events they would attend over the course of the week so that an average could be calculated. This allows a more accurate calculation of room nights.
- To solicit responses to the survey items, face-to-face intercept interviews were conducted with randomly-selected attendees. Beer Week volunteers were supervised by Brewer's Guild managers and staff during the interview process. Interviewers were trained on how to conduct the interviews and remove response bias. In addition, the interviewers conducted practice interviews. Anonymity of the responses was ensured by the interviewees and participation was completely voluntary.
- Upwards of 400 Beer Week attendees were approached during the 17 events and questioned on their accommodations during the event. Those who were in fact staying in a hotel during Beer Week and had not answered the questions online went on to complete the entire survey. Only those respondents whose stay was a direct result of Beer Week activities were included in the calculations. Using these conditions, a total of 145 usable responses resulted.

III. Calculations

1. Web Survey

- For the web survey, room nights were calculated by simply multiplying number of rooms reported x number of nights reported for the 55 responses. For example, a party that booked 1 room for two nights yielded a total of 2 room nights. Each response was calculated this way for a total of 139 room nights.

2. Intercept Interviews

- To estimate room nights through the intercept interviews, an average number of room nights per event was determined. In traditional sampling, average room nights would be calculated and multiplied by the total number of out-of-town attendees. San Diego Beer Week consists of a large variety of events that are not closely coordinated. Total attendance is not possible to calculate, therefore identifying the number of room nights by event seemed reasonable.
- To be as accurate as possible, three separate analyses were conducted based on the size of the event. That is, an average was calculated for large events and multiplied, and the same was done for medium sized and small events to account for differences that may exist for attendees of each.

Size	Events Sampled	Response Total	*Avg. Room Nights Per Event	Number of Events	Total Room Nights
Large	3	57	15.97	3	48**
Medium	7	40	4.14	7	29**
Small	7	48	6.384	532	3,396**
Total	17	145		542	3,473

*Response total was divided by the number of events sampled and the average number of events attended. This "average number of attendees per event" total of was multiplied by the average number of room nights from the survey to determine the average room nights generated per event.

** Rounded

3. ROI Calculation

- To calculate the return on investment for TMD dollars, the standard ADR of \$129.93 was multiplied by the estimated room nights for both data collections

Study	Room Nights	Rate	Total
Web Survey	139	\$129.93	\$18,060.00*
Intercept Surveys	3,473	\$129.93	\$451,247.00*
Total	3,612	\$129.93	\$469,307.00
Investment			\$74,999.00
ROI			6.26:1

4. TMD Properties

- To determine where respondents are staying while in San Diego, anecdotal evidence is provided through the survey process. A sampling of attendees is asked about their specific hotel name which is then cross-matched with the list of TMD properties. This suggests the majority of hotels room nights generated are TMD properties.

5. Limitations

- Although every effort was taken to ensure an accurate estimation of room nights generated during San Diego Beer Week, some limitations exist:
 - Sample Size- while attempts were made to ensure a reasonable sample size (i.e., surveying a greater number of events and using more interviewers), a total of 145 actual responses resulted or an average of 48.3 per event size. The web survey was an actual count of room nights, so the small size is less of a limitation than for the intercept survey. When inferring to a larger population, a greater number of surveys would be desired. Conversely, the fact that a small number of attendees per event was found may indicate an actual pattern for this series of dispersed events. The fact that the sample remains small over two years indicates that the unique characteristics of Beer Week generate a smaller number of room nights per event, however the high number of events results in a significant number of total room nights.

2. The number of TMD properties and reluctance of some respondents to provide their hotel name makes documenting that every room night was generated by a TMD property difficult. However the sampling process used suggests that the majority of properties are TMD hotels.