

**Economic Impact Analysis of the 2017  
Outside Lands Festival  
on the City of San Francisco and the Bay Area**



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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 Festival (OL) held in Golden Gate Park, San Francisco, August 11-13, 2017.

This report takes evidence collected through both an on-site survey and an online survey of the demographic characteristics and spending patterns of Festival attendees. From this data, the authors of this study have created estimates of the amount of new spending that occurred as a result of the Festival. These estimates were then used to assess the overall economic impact in the form of increased output, incomes, and jobs for City and Bay Area businesses and residents.

Overall, it is estimated that the Festival generated new economic activity for the city of San Francisco in the amount of \$66.8 Million, and \$75 Million for the entire Bay Area respectively. The Festival also increased incomes by \$32.6 million, and created the equivalent of 700.4 full time yearlong jobs.

**Sales impact on the City of San Francisco was \$66.8 Million, while for the entire Bay Area it was \$75 Million.**

### Results

- Created an equivalent of 700.4 full time year-round jobs
- 65% of the respondents to the survey lived outside of the City of San Francisco (22.2% from CA but Outside the Bay Area). 35% were San Francisco residents
- 41% of non-residents stated OL was the only reason for their coming to San Francisco
- 96% were aware of OL prior to leaving home
- 99% of those staying overnight spent at least one night in San Francisco. 73% of those stayed 3 or more nights.
- 41,448 hotel nights were booked in the Bay Area that are closely linked to the Festival, approximately 41,309 of which were in San Francisco.
- Food/Beverages and Lodging were the two largest expenditure categories
- The gender of respondents to the survey were 59% female and 41% male

Utilizing this data, the total direct expenditures from the OL Festival in San Francisco were estimated to be \$29,995,144. Spending in the Bay Area outside of SF was \$2,596,099. This resulted in total direct expenditures in the entire Bay Area of \$32,591,244.

Through the use of an industry standard model (IMPLAN), we are able to ascertain the overall economic impact of the Festival on the City of San Francisco and the Broader Bay Area. The \$36.9 million in total spending by spectators and organizers turns into an economic benefit to, or increased output in, the City of San Francisco of \$66.8 million and \$75.0 million to the region as a whole.

**Table 11. Economic Impact of the Festival**

Location	Economic Activity	Income	Jobs Created	State and Local Taxes
San Francisco	66,842,263	29,995,144	581	6,753,196
Other Bay Area	8,152,189	2,596,099	120	2,712,471
Total	74,994,452	32,591,244	700	9,465,668

Source: Outside Lands Organizers, online survey, IMPLAN

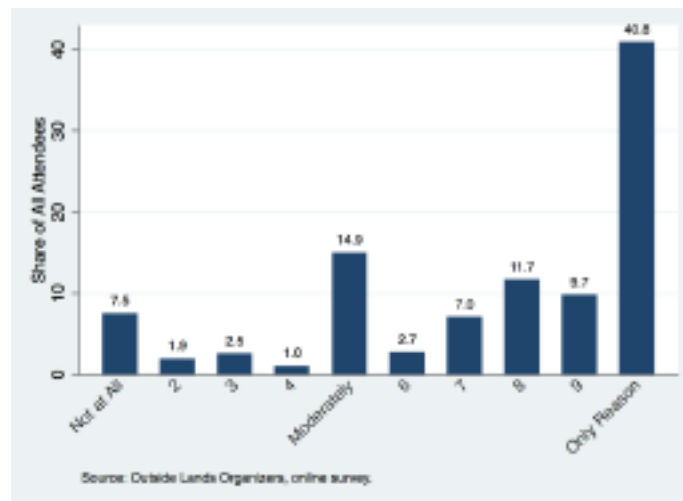
Direct expenditures from OL were utilized to estimate the economic impact on San Francisco and the entire Bay Area. A key type of data is respondent home residence - this is later utilized in the calculation of economic impact shown in the table below.

<b>Respondent Home Residence</b>	<b>Percent</b>
San Francisco	35.0 %
Bay Area Outside San Francisco	32.5 %
California Outside Bay Area	22.2 %
USA Outside of California	9.9 %
Other Country	0.4%

\* Note that the Bay Area outside of San Francisco 32.5% constitutes the six counties outside of San Francisco.

Non-resident respondents were asked if they were aware of OL before going to San Francisco on their trip and over 40% responded that the Festival was their only reason to visit.

<b>Aware of OSL Prior to Visit</b>	<b>Valid Percent</b>
Yes	96.0 %
No	4.0 %



Of those attending from outside of the Bay Area and spending the night outside of a private residence, the vast majority stayed for three or more nights and attended all three days of the Festival.

The Festival does not create jobs that last for a year, but the hours worked to produce the goods and services related to putting on the Festival are equivalent to employing approximately 18,821 people for 40 hours each week during the course of the Festival.

<b>Location Of Spending Impact</b>	<b>FTE Jobs *</b>
Total in San Francisco	700.4

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