

Sisters Folk Festival
Economic Impacts and Visitor Profile
September 5-7, 2014

November 2014

Prepared for

Sisters Folk Festival, Inc.
Sisters, Oregon

Dean Runyan Associates
833 SW 11th Avenue, Suite 920
Portland, Oregon 97205
(503) 226-2973 FAX 226-2984
www.deanrunyan.com

ACKNOWLEDGEMENTS

This study was prepared for Sisters Folk Festival with grant funding provided by The Ford Family Foundation and the Deschutes County Commissioners Discretionary Fund. Special thanks are due to Katy Yoder, Development Director and Ann Richardson, Managing Director and the Finance Committee of the Board of Directors. They contributed to the creation of this instrument, assisted with data collection and reviewed the draft report for clarity and presentation.

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Summary

In September 2014, the Sisters Folk Festival attracted approximately 3,700 attendees, many of whom traveled from outside Deschutes County. This summary highlights the characteristics of Event attendees and the economic benefits that they generate for the City of Sisters and Sisters Country (the area surrounding Sisters).

Profile of Sisters Folk Festival Attendees

- A large portion (73%) attended Sisters Folk Festival during a previous year.
- A sizeable majority (82%) of the Sisters Folk Festival attendees are age 55 and older.
- Attending Sisters Folk Festival was the primary purpose for travel to the City of Sisters for the vast majority (88%) of event attendees.
- About two-thirds (64%) of Sisters Folk Festival participants stayed overnight while attending the event.
- Among those who stayed overnight, over half (58%) stayed in a hotel, motel, lodge, or B&B; most of the remainder stayed in private homes with friends and relatives, or in campgrounds.
- Sisters Folk Festival attendees also visited a number of other communities and attractions including: Bend, Deschutes National Forest, Metolius River, Camp Sherman, Redmond, and Black Butte Ranch.

Economic impacts of Sisters Folk Festival

- Attendees to Sisters Folk Festival spent approximately \$1.2 million in the City of Sisters and Sisters Country.
- These visitors spent approximately \$414,000 on entertainment and recreation (includes all ticket purchases), \$244,000 on food and beverages in restaurants and bars, \$211,000 on overnight accommodations, and \$346,000 on retail purchases (includes merchandise, groceries, and gasoline).
- Other direct economic impacts include \$260,000 in earnings (wage and salary disbursements), supporting 13 full- and part-time jobs, \$12,600 in local tax revenue (lodging tax receipts), and nearly \$27,600 in state tax revenue.

1. Introduction and Overview

Sisters Folk Festival, a three-day celebration of roots music, from blues to bluegrass, attracted approximately 3,700 attendees in September, 2014. The Festival is home to ten stages, and food and beverages are available at many of the Festival venues and local restaurants.

Based on the results of a survey of Sisters Folk Festival attendees, conducted during Sept.-Oct. 2014, this report provides the economic benefits generated for the City of Sisters and Sisters Country (see definition below). In addition, this report describes characteristics for event attendees.

Before proceeding it is useful to clarify a couple of terms that appear throughout this discussion:

Attendee refers to all persons who attended Sisters Folk Festival.

Sisters Country refers to the City of Sisters, Black Butte Ranch, and Camp Sherman.

Data Collection and Sample

An on-line survey of Sisters Folk Festival attendees was conducted in order to gather data on visitor expenditures, location of residence, and other factors for which there are no other reliable data sources.

Attendance

Attendance to the Sisters Folk Festival totaled about 3,700 people, as shown in Table 1-1. This estimate is based on ticket sales, complimentary tickets, and sponsorship attendance. The portion attributed to overnight and day travel, as well as average length of stay and party size was based on data results from the Sisters Folk Festival attendee survey.

Table 1-1
Attendance and Visitor Party Days
Sisters Folk Festival, September 2014

Attendance:	
Ticket Sales (number sold)	3,126
Complimentary & Sponsorship	<u>550</u>
Total Attendance (number of persons)	3,676
Overnight Travel:	
Overnight Visitors (64%)	2,353
Average Party Size (adults only)	3.1
Overnight Visitor Parties	771
Average Overnight Stay in Sisters Country	2.8
Overnight Visitor Party Days in Sisters	2,160
Day Trips:	
Day Trip Attendees (36%)	1,323
Average Party Size (adults only)	2.3
Day Trip Parties	586
Day Trip Visitor Party Days	1,054

Source: Dean Runyan Associates

Economic Impacts

The Sisters Folk Festival attendees made a wide variety of purchases for food and beverages, lodging, recreation, transportation and retail items. These expenditures generate additional economic activity within the City of Sisters and Sisters Country and help support the local businesses.

Economic benefits included in the study consist of expenditures, payroll and associated tax revenue generated by Sisters Folk Festival attendees. These detailed findings are described in the third section of this report.

2. Festival Attendee Profile

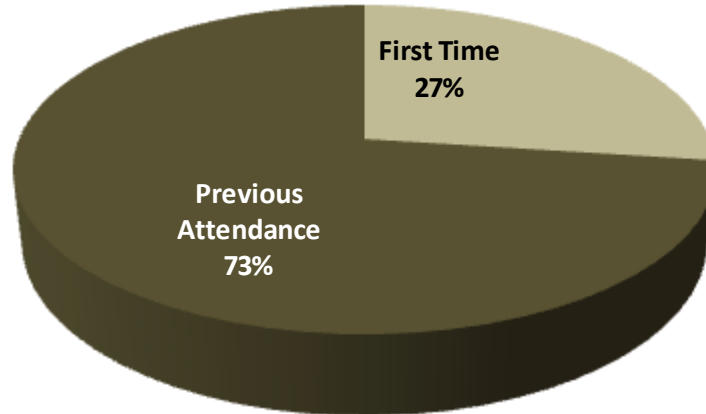
This section provides survey findings useful for planning, program development, and marketing purposes, and includes data related to:

- Previous Visitation and Trip Motivation
- Overnight vs. Day Travel and Nights in Sisters
- Travel Party Companions and Accommodation Type
- Visits to Attractions, Other Communities, and Places
- Trip Planning and Demographics

Previous Visitation and Trip Motivation

Sisters Folk Festival attracted a notable proportion of repeat attendees compared to those who attended for the first time. Of all event attendees, almost three-quarters (73%) reported that they had attended the Sisters Folk Festival in a prior year.

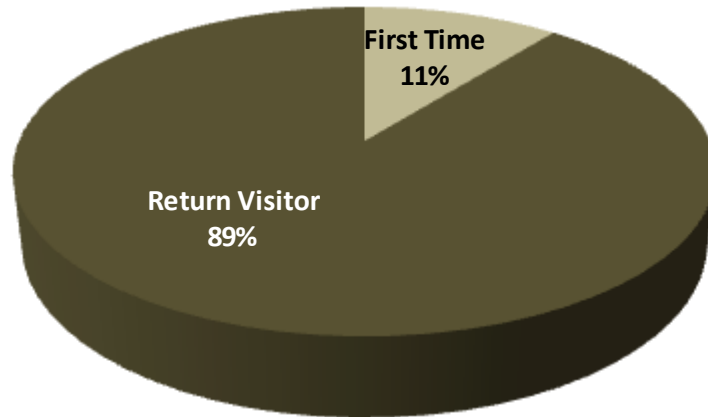
Figure 2-1
First Time Attendance
Sisters Folk Festival, September 2014



Base: Sisters Folk Festival Survey (n = 454)
Source: Dean Runyan Associates

Likewise, most Sisters Folk Festival attendees were return visitors to the City of Sisters, with 9 in 10 (89%) reporting that they are return visitors.

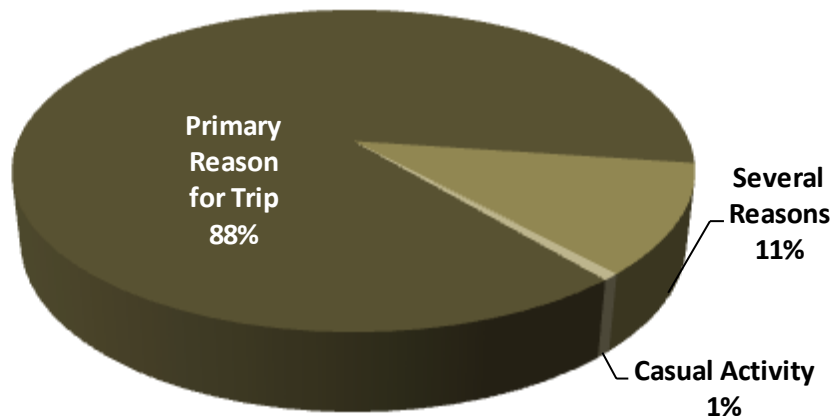
Figure 2-2
First Time Visitor to Sisters
Sisters Folk Festival, September 2014



Base: Sisters Folk Festival Survey (n = 454)
Source: Dean Runyan Associates

Among all overnight visitors, the Sisters Folk Festival was the primary reason for the trip for the vast majority. Overall, 88 percent of overnight visitors indicated the Sisters Folk Festival was the primary reason for the trip.

Figure 2-3
Motivation for Overnight Travel
Sisters Folk Festival, September 2014

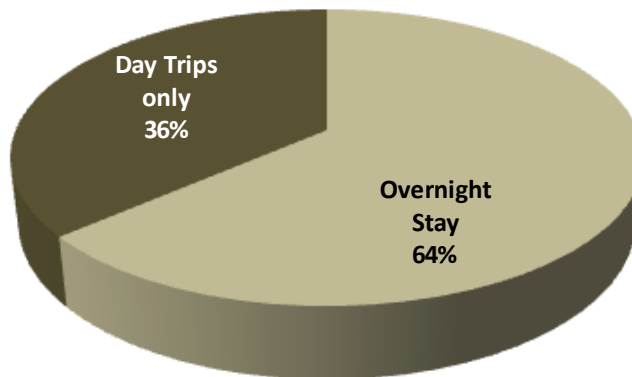


Base: Sisters Folk Festival Survey (n = 282)
Source: Dean Runyan Associates

Overnight Stay vs. Day Trip and Nights in Sisters Country

Overall, approximately two-thirds of Sisters Folk Festival attendees (64%) stayed at least one night away from home while attending the event. The remainder of attendees made day trips.

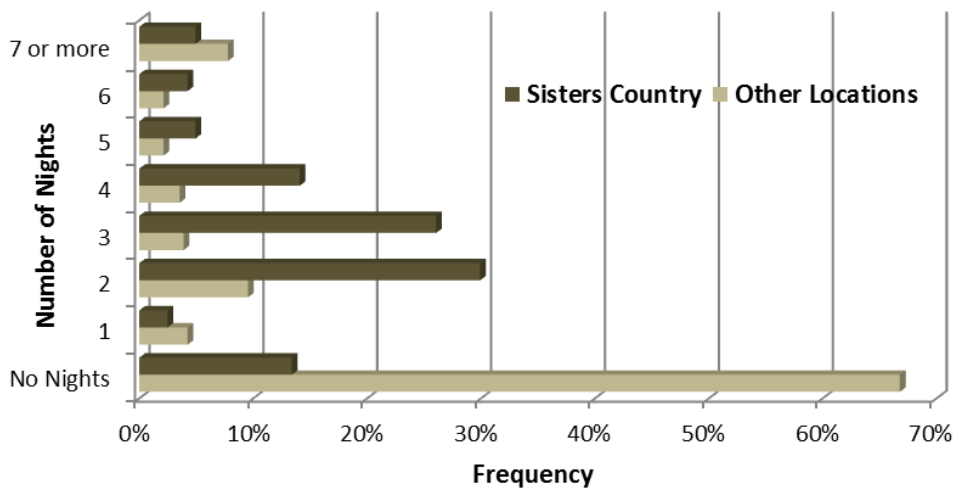
Figure 2-4
Overnight Stay vs. Day Trips
Sisters Folk Festival, September 2014



Base: Sisters Folk Festival Survey (n = 448)
Source: Dean Runyan Associates

Among all overnight Festival attendees, most (87%) spent one or more nights in Sisters Country (including Sisters, Black Butte Ranch, and Camp Sherman). A much smaller portion (only 13%) did not stay any nights Sisters Country, though did stay overnight in other locations, which may have included homes of friends and family.

Figure 2-5
Nights in Sister Country
Sisters Folk Festival, September 2014

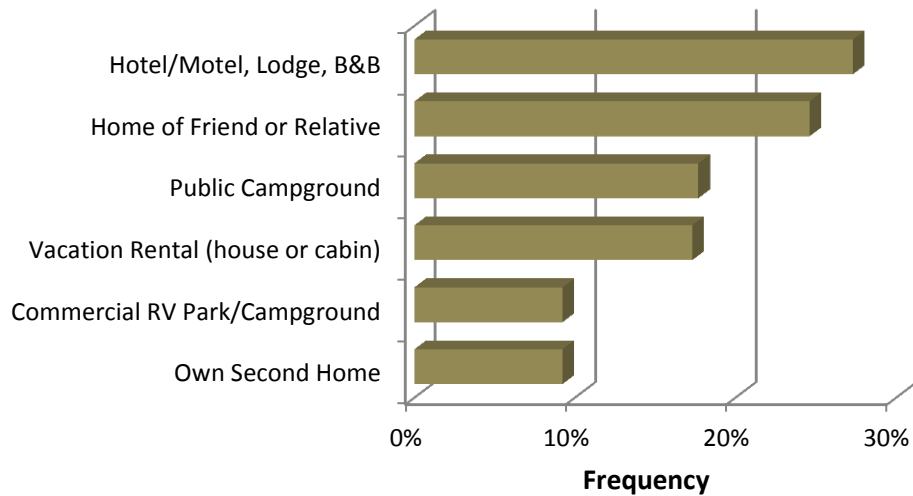


Base: Sisters Folk Festival Survey (n = 284)
Source: Dean Runyan Associates

Type of Accommodation

Among event attendees who stayed overnight in Sisters Country, more than one-quarter (27%) stayed at least one night in a hotel/motel, lodge, or B&B. Another quarter stayed with friends and relatives (25%), while most of the remainder stayed in vacation rentals, commercial RV parks, and public campgrounds.

Figure 2-6
Overnight Accommodation Type
Sisters Folk Festival, September 2014

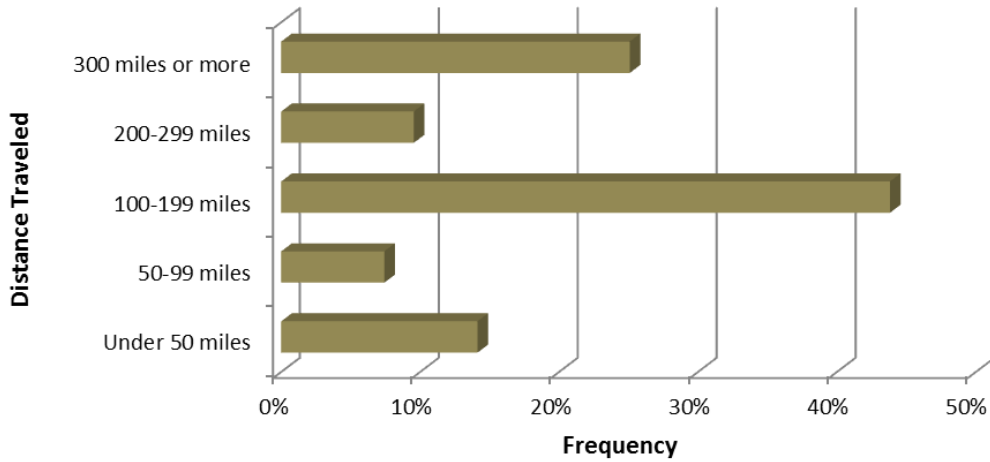


Base: Sisters Folk Festival Survey (n = 260)
Source: Dean Runyan Associates

Distance Traveled

Among those attendees who spent one or more nights away from home, most traveled more than 100 miles, and one-quarter (25%) traveled from a distance of 300 miles or more from their place of residence. Among Sisters Folk Festival attendees who traveled for the day, most (94%) traveled from a distance of less than 200 miles from their place of residence.

Figure 2-7
Distance Traveled for Overnight Trips
Sisters Folk Festival, September 2014

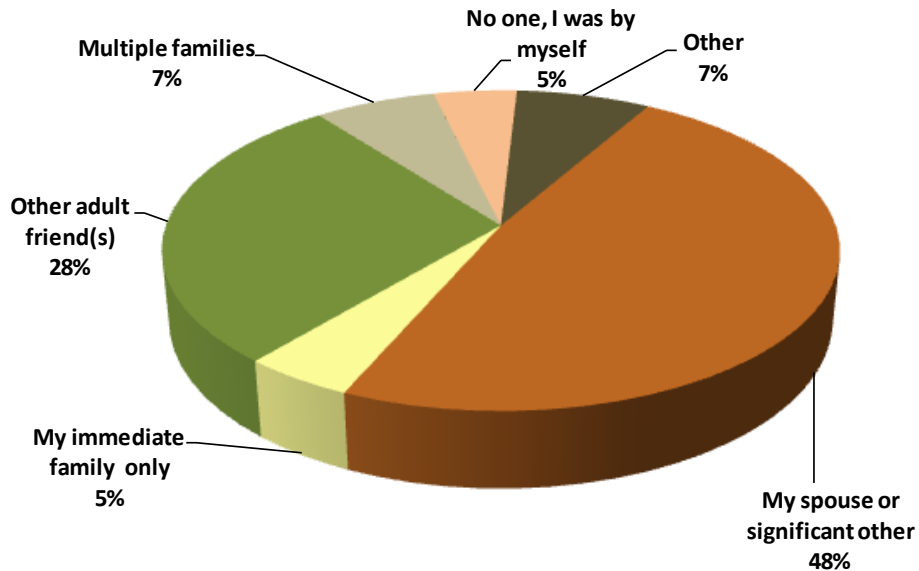


Base: Sisters Folk Festival Survey (n = 283)
Source: Dean Runyan Associates

Travel Party Companions

Nearly half (48%) of overnight visitors to the Sisters Folk Festival traveled with their spouse or significant other to attend the event, while over one-quarter (28%) traveled with other adult friends. Other notable travel companions included families and other companions.

Figure 2-8
Overnight Travel Party Companions
Sisters Folk Festival, September 2014

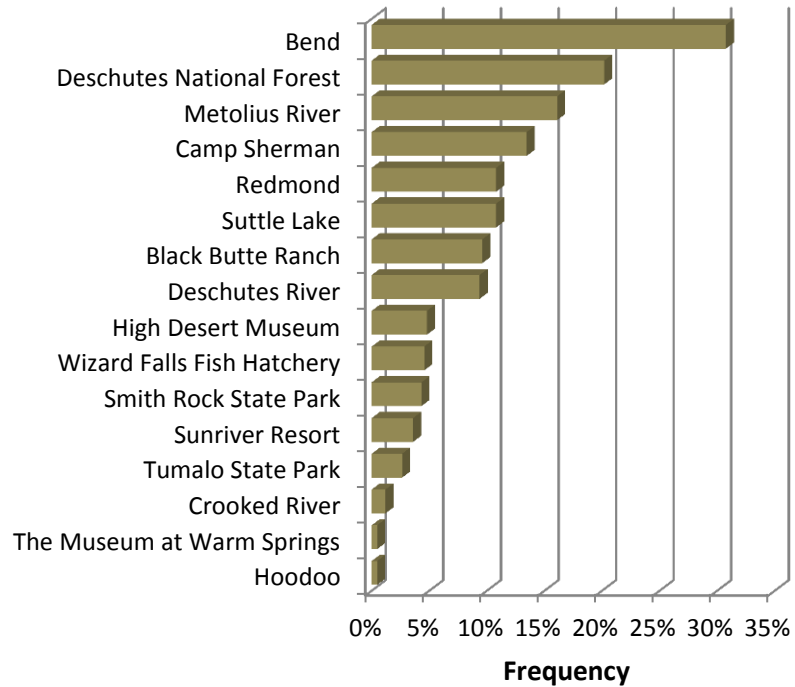


Base: Sisters Folk Festival Survey (n = 282)
Source: Dean Runyan Associates

Visits to Attractions, Other Communities, and Places

Those who attended the Sisters Folk Festival also visited a number of other places and attractions throughout Sisters Country, and in Central Oregon, while on the trip. Most notably, these locations include the City of Bend, Deschutes National Forest, Metolius River, and Camp Sherman.

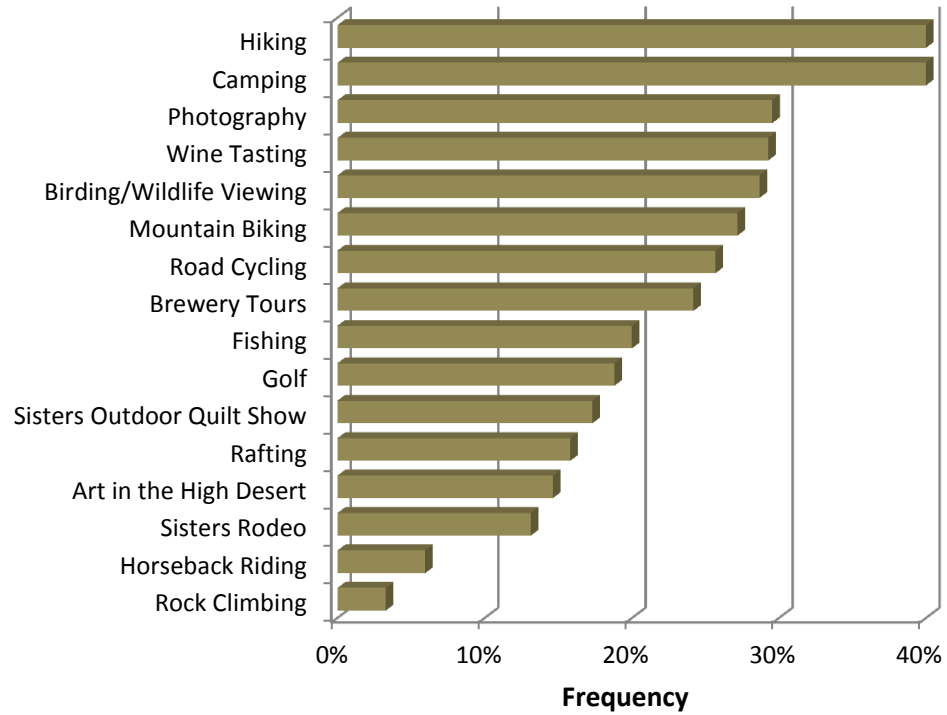
Figure 2-10
Visits to Places and Attractions while in or near Sisters Country, 2014



Base: Sisters Folk Festival Survey (n = 416)
Source: Dean Runyan Associates

Attendees to the Sisters Folk Festival also participated in a number of other recreation activities and events throughout Oregon during 2014. Some of the more popular outdoor recreation activities include hiking, camping, photography, birding/wildlife viewing, and cycling.

Figure 2-11
Participation in other Recreation Activities and Events in Oregon, 2014

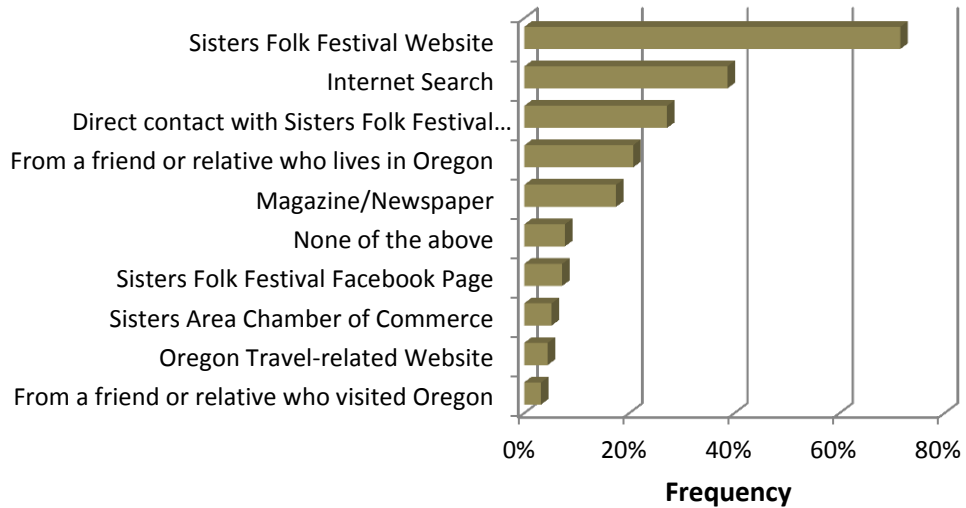


Base: Sisters Folk Festival Survey (n = 335)
Source: Dean Runyan Associates

Trip Planning and Demographics

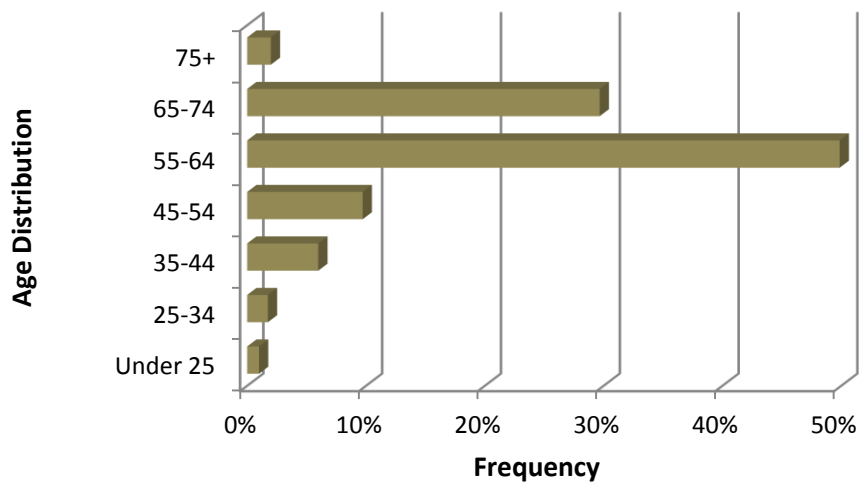
In terms of trip planning, nearly three-quarters (72%) found the Sisters Folk Festival website useful in planning their trip.

Figure 2-12
Most Useful Sources of Information
Sisters Folk Festival, September 2014



Base: Sisters Folk Festival Survey (n = 401)
Source: Dean Runyan Associates

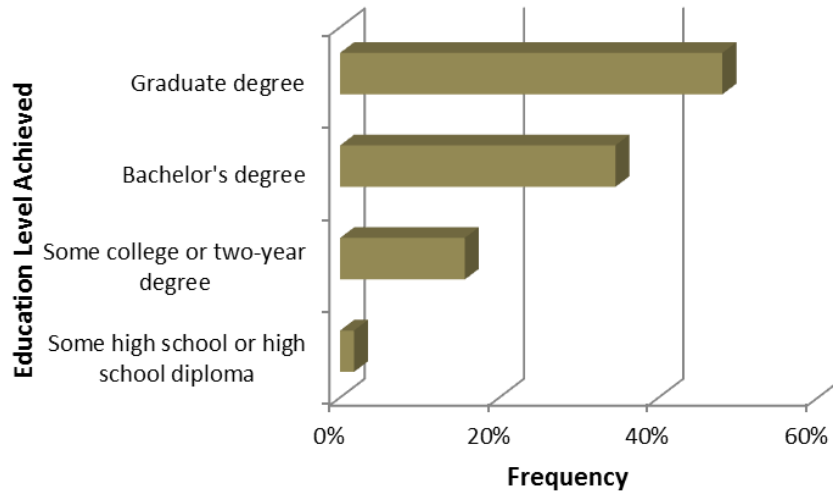
Figure 2-13
Age of Respondent
Sisters Folk Festival, September 2014



Base: Sisters Folk Festival (n = 401)
Source: Dean Runyan Associates

Demographics (continued)

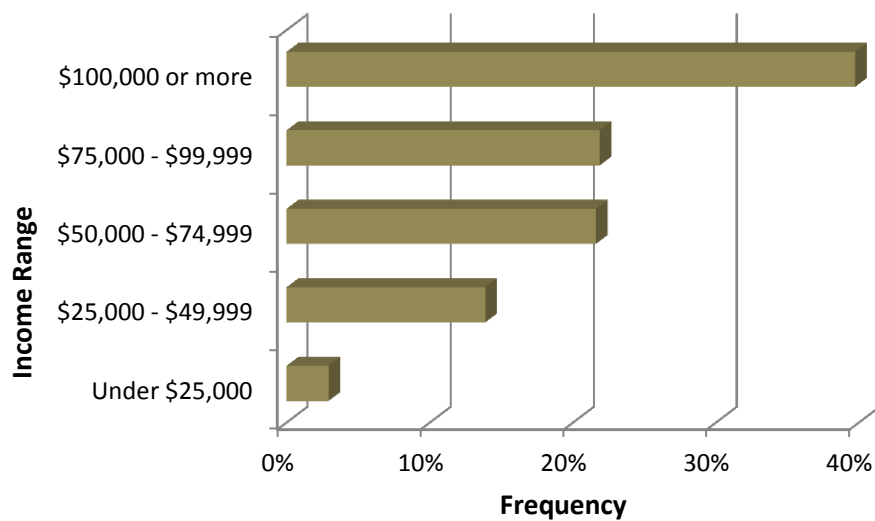
Figure 2-14
Education Level of Respondent
Sisters Folk Festival, September 2014



Base: Sisters Folk Festival (n = 402)

Source: Dean Runyan Associates

Figure 2-15
Income Range of Respondent's Household
Sisters Folk Festival, September 2014



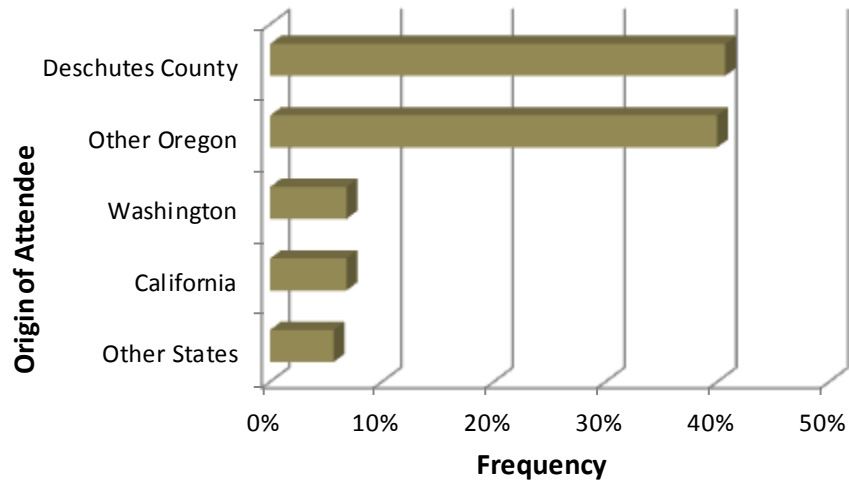
Base: Sisters Folk Festival (n = 375)

Source: Dean Runyan Associates

Origin of Festival of Attendee

Most of the festival attendees were residents of Oregon, with Deschutes County residents representing about 40 percent, and a nearly equal number from other parts of the state. Other attendees traveled from Washington and California (7% from each state), with the remainder of attendees traveling from other states.

Figure 2-16
Origin of Festival Attendee
Sisters Folk Festival, September 2014



Source: Sisters Folk Festival ticket sales

3. Economic Impacts

Sisters Folk Festival generates economic benefits for Sisters and Sisters Country to the extent that the event draws participants who would otherwise not make expenditures in Sisters. Expenditures include purchases of food, lodging, transportation, event tickets and retail purchases made in Sisters and Sisters Country. Respondents were instructed to report the expenditures made on the trip during which they attended the Sisters Folk Festival.

Methodology Overview

This analysis draws on data collected from the survey of those who attended Sisters Folk Festival and on attendance data derived from ticket sales. In addition, the study makes use of other economic data on Deschutes County that are available from statewide travel impact studies conducted for Oregon Office of Tourism by Dean Runyan Associates. The primary emphasis is on expenditures, payroll and tax receipts that are directly attributable to visitors who attended the Sisters Folk Festival. These expenditures represent purchases made in Sisters Country while on a trip during which visitors attended Sisters Folk Festival.

Direct Economic Impacts

Sisters Folk Festival generated approximately \$1.2 million in direct expenditures made by participants many of whom traveled from outside the area. Table 3-1 shows a breakout of visitor spending by Type of Travel Accommodation *and* Spending by Commodity. Visitors who stayed overnight in a Hotel, Motel, Lodge, Rented Cabin or B&B accounted for \$528,000 of total expenditures (43%). Visitors spending the night with friends and relatives or in vacation homes (private homes) spent about \$312,000, while visitors spending the night at campgrounds spent about \$197,000. These direct expenditures generated \$260,000 in earnings (wage and salary), supporting 13 both full- and part-time jobs.

State and local tax receipts generated by lodging sales, food and beverage, recreation, retail, and gasoline purchases amounted to about \$40,000. These state and local tax receipts are calculated based on visitor expenditure amounts discussed previously.

Table 3-1
Sisters Folk Festival
Economic Impacts in Sisters Country, 2014

	2014
Event Attendee Spending by Type of Traveler Accommodation (\$)	
Hotel, Motel, Lodge, B&B	528,000
Private Home	312,000
Day Travel	197,000
Campground	177,000
Spending at Destination	1,214,000
Event Attendee Spending by Commodity Purchased (\$)	
Arts, Entertainment & Recreation (includes ticket purchases)	414,000
Food & Beverage Services	244,000
Accommodations	211,000
Other Retail	121,000
Ground Tran. & Motor Fuel	118,000
Food Stores	107,000
Spending at Destination	1,215,000
Industry Earnings Generated by Travel Spending (\$)	
Leisure & Hospitality	129,000
Arts, Entertainment & Recreation	105,000
Retail (includes merchandise, groceries, and gasoline)	26,000
Total Direct Earnings	260,000
Industry Employment Generated by Travel Spending (Jobs)	
Leisure & Hospitality	7
Arts, Entertainment & Recreation	5
Retail (includes merchandise, groceries, and gasoline)	1
Total Direct Employment	13
Tax Receipts Generated by Travel Spending (\$)	
Local Tax Receipts	12,600
State Tax Receipts	27,600
Total Direct Tax Receipts	40,200

Source: Dean Runyan Associates

APPENDIX A
Detailed Expenditure Data

Table A-1
Average Daily Expenditures (\$ per party per day)
By Accommodation Type and Expenditure Category

	Hotel/Motel/B&B	Campground	Private Home	Day Trip
Accommodations	\$186	\$59	\$12	\$0
Food & Beverage Services	\$79	\$67	\$72	\$75
Food Stores	\$30	\$34	\$46	\$26
Ground Tran. & Motor Fuel	\$38	\$43	\$57	\$17
Arts, Entertainment & Recreation	\$106	\$96	\$92	\$177
Other Retail	\$37	\$23	\$38	\$42
Total	\$476	\$321	\$316	\$337

Source: Dean Runyan Associates

Table A-2
Average Daily Expenditures (\$ per party per trip)
By Accommodation Type and Expenditure Category

	Hotel/Motel/B&B	Campground	Private Home	Day Trip
Accommodations	\$521	\$166	\$32	\$0
Food & Beverage Services	\$220	\$186	\$200	\$75
Food Stores	\$84	\$96	\$130	\$26
Ground Tran. & Motor Fuel	\$107	\$119	\$161	\$17
Arts, Entertainment & Recreation	\$296	\$268	\$257	\$177
Other Retail	\$104	\$63	\$106	\$42
Total	\$1,332	\$899	\$886	\$337

Source: Dean Runyan Associates