ECONOMIC IMPACTS AND VISITOR PROFILE

SISTERS FOLK FESTIVAL

Prepared By:
Dean Runyan Associates
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.
# Table of Contents

**Summary** ........................................................................................................................................ III

Profile of Sisters Folk Festival Attendees ......................................................................................... III

Economic impacts of Sisters Folk Festival ......................................................................................... III

1. **Introduction and Overview** ........................................................................................................... 1

   Data Collection and Sample ........................................................................................................... 1

   Attendance ........................................................................................................................................ 1

   Economic Impacts .......................................................................................................................... 2

2. **Festival Attendee Profile** ............................................................................................................... 3

   Previous Visitation and Trip Motivation ..................................................................................... 3

   Overnight Stay vs. Day Trip and Nights in Sisters Country ....................................................... 5

   Type of Accommodation .............................................................................................................. 6

   Distance Traveled .......................................................................................................................... 6

   Travel Party Companions .............................................................................................................. 7

   Visits to Attractions, Other Communities, and Places .............................................................. 8

   Trip Planning and Demographics ............................................................................................... 10

   Demographics (continued) ........................................................................................................... 11

   Origin of Festival of Attendee ....................................................................................................... 12

3. **Economic Impacts** ....................................................................................................................... 13

   Methodology Overview ............................................................................................................... 13

   Direct Economic Impacts .............................................................................................................. 14

   Detailed Expenditure Data ............................................................................................................ 15
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 reminder 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

<table>
<thead>
<tr>
<th>Attendance:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Ticket Sales (number sold)</td>
<td>3,126</td>
</tr>
<tr>
<td>Complimentary &amp; Sponsorship</td>
<td>550</td>
</tr>
<tr>
<td>Total Attendance (number of persons)</td>
<td>3,676</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Overnight Travel:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Overnight Visitors (64%)</td>
<td>2,353</td>
</tr>
<tr>
<td>Average Party Size (adults only)</td>
<td>3.1</td>
</tr>
<tr>
<td>Overnight Visitor Parties</td>
<td>771</td>
</tr>
<tr>
<td>Average Overnight Stay in Sisters Country</td>
<td>2.8</td>
</tr>
<tr>
<td>Overnight Visitor Party Days in Sisters</td>
<td>2,160</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Day Trips:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Day Trip Attendees (36%)</td>
<td>1,323</td>
</tr>
<tr>
<td>Average Party Size (adults only)</td>
<td>2.3</td>
</tr>
<tr>
<td>Day Trip Parties</td>
<td>586</td>
</tr>
<tr>
<td>Day Trip Visitor Party Days</td>
<td>1,054</td>
</tr>
</tbody>
</table>

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.

![Pie chart showing First Time Attendance and Previous Attendance](chart.png)

**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

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
**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](image)

**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](image)

**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.

![Bar Chart showing types of accommodation](chart.png)

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

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.
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.
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

- Hiking
- Camping
- Photography
- Wine Tasting
- Birding/Wildlife Viewing
- Mountain Biking
- Road Cycling
- Brewery Tours
- Fishing
- Golf
- Sisters Outdoor Quilt Show
- Rafting
- Art in the High Desert
- Sisters Rodeo
- Horseback Riding
- Rock Climbing

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

- Sisters Folk Festival Website
- Internet Search
- Direct contact with Sisters Folk Festival...
- From a friend or relative who lives in Oregon
- Magazine/Newspaper
- None of the above
- Sisters Folk Festival Facebook Page
- Sisters Area Chamber of Commerce
- Oregon Travel-related Website
- From a friend or relative who visited Oregon

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

![Bar chart showing education levels of respondents]

Base: Sisters Folk Festival (n = 402)
Source: Dean Runyan Associates

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

![Bar chart showing income ranges of respondents]

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](image-url)

**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 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

<table>
<thead>
<tr>
<th>Event Attendee Spending by Type of Traveler Accommodation ($)</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel, Motel, Lodge, B&amp;B</td>
<td>528,000</td>
</tr>
<tr>
<td>Private Home</td>
<td>312,000</td>
</tr>
<tr>
<td>Day Travel</td>
<td>197,000</td>
</tr>
<tr>
<td>Campground</td>
<td>177,000</td>
</tr>
<tr>
<td>Spending at Destination</td>
<td>1,214,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Event Attendee Spending by Commodity Purchased ($)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts, Entertainment &amp; Recreation (includes ticket purchases)</td>
<td>414,000</td>
</tr>
<tr>
<td>Food &amp; Beverage Services</td>
<td>244,000</td>
</tr>
<tr>
<td>Accommodations</td>
<td>211,000</td>
</tr>
<tr>
<td>Other Retail</td>
<td>121,000</td>
</tr>
<tr>
<td>Ground Tran. &amp; Motor Fuel</td>
<td>118,000</td>
</tr>
<tr>
<td>Food Stores</td>
<td>107,000</td>
</tr>
<tr>
<td>Spending at Destination</td>
<td>1,215,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Industry Earnings Generated by Travel Spending ($)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure &amp; Hospitality</td>
<td>129,000</td>
</tr>
<tr>
<td>Arts, Entertainment &amp; Recreation</td>
<td>105,000</td>
</tr>
<tr>
<td>Retail (includes merchandise, groceries, and gasoline)</td>
<td>26,000</td>
</tr>
<tr>
<td>Total Direct Earnings</td>
<td>260,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Industry Employment Generated by Travel Spending (Jobs)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure &amp; Hospitality</td>
<td>7</td>
</tr>
<tr>
<td>Arts, Entertainment &amp; Recreation</td>
<td>5</td>
</tr>
<tr>
<td>Retail (includes merchandise, groceries, and gasoline)</td>
<td>1</td>
</tr>
<tr>
<td>Total Direct Employment</td>
<td>13</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tax Receipts Generated by Travel Spending ($)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Tax Receipts</td>
<td>12,600</td>
</tr>
<tr>
<td>State Tax Receipts</td>
<td>27,600</td>
</tr>
<tr>
<td>Total Direct Tax Receipts</td>
<td>40,200</td>
</tr>
</tbody>
</table>

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

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

Source: Dean Runyan Associates

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

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

Source: Dean Runyan Associates