

Bounder

Wagons West 2004 Bounder Rally Economic Impact Report
Oregon State Fair and Exposition Center
September 28 to October 2, 2004



Prepared by



MARKIN CONSULTING ■ MAPLE GROVE, MINNESOTA

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The Rally

Bounders United, Inc., an international non-profit motor home club, comprised of more than 2,800 members who own Bounder motor homes, held its 17th annual national rally at the Oregon State Fair and Exposition Center in Salem, Oregon, September 28 to October 2. The theme of the rally was “Wagons West 2004.”

Members from 25 states and provinces attended the Wagons West 2004 Rally (the Rally), accounting for 365 rigs at the Oregon State Fair and Exposition Center. Key visitation and spending information was gathered from Rally participants through on-site surveys (See Exhibit A) that were distributed at the beginning of the Rally. Of the 365 rigs, 185 surveys were returned.

Of the 185 surveys returned, 174 were considered usable, based on the completeness of the information provided in the returned survey. Of the 174 usable surveys, 18 were from Oregon residents. Spending data for Oregon residents were not included in the visitation or estimates of spending impacts because spending by Oregon residents merely represents a redistribution of dollars within the Oregon economy - not new dollars to the State.

Because the surveys asked for the Rally participants’ expectation of their plans for visiting other parts of Oregon after the Rally along with related spending, those estimates are prone to wider variances than the pre-Rally and Rally reports.

The Rally Participants

While Bounders United, Inc. is an international club, the majority of participants at the Wagons West 2004 Rally were from the western portion of the United States, with only a handful traveling from east of the Mississippi River. The majority of participants were residents of the states of California, Washington and Oregon, as well as Arizona, Colorado, Nevada and Texas.

As depicted in Table I, just over 32 percent of the Rally participants were from California. About 13 percent of the participants were from Washington and close to 10 percent were from Oregon.

Table I

Wagons West 2004 Rally	
Participant Residency	Percent
California	32.4%
Washington	13.0%
Oregon	9.7%
Colorado	6.5%
Arizona	5.9%
Texas	4.9%
Nevada	3.2%
Minnesota	3.2%
All Other 17 States/Provinces	21.1%

The Regions Visited

The Rally participants visited various regions of the State of Oregon before the Rally and also expected to continue to visit areas of Oregon after the Rally. Oregon’s most visited region, either before or after the Rally, was the coastal area, with more than 68 percent of the participants visiting that region. Southern Oregon was the second most visited region, due in part to the large percent of participants who traveled to the Rally in Salem through the southern part of the State. Table 2 presents the regions visited by all of the participants, as well as by those from the states shown.

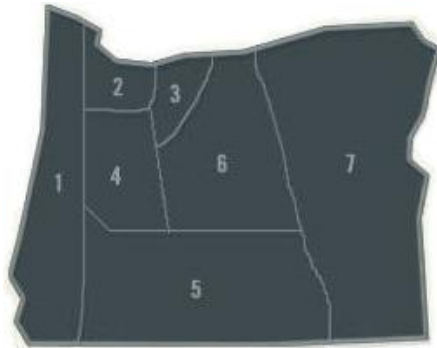


Table 2

Wagons West 2004 Rally Regions Visited		Place of Residency							
		ALL	CA	WA	CO	AZ	TX	NV	MN
1	The Coast	68.2%	63.8%	54.2%	100.0%	63.6%	71.4%	83.3%	83.3%
2	Portland	45.5%	37.9%	41.7%	60.0%	36.4%	42.9%	33.3%	50.0%
3	Mt. Hood/Gorge	26.6%	22.4%	16.7%	60.0%	36.4%	14.3%	0.0%	66.7%
4	Willamette Valley	50.6%	51.7%	58.3%	20.0%	36.4%	57.1%	50.0%	50.0%
5	South Oregon	54.5%	67.2%	20.8%	40.0%	72.7%	71.4%	66.7%	33.3%
6	Central Oregon	41.6%	44.8%	29.2%	30.0%	27.3%	28.6%	33.3%	50.0%
7	Eastern Oregon	26.0%	17.2%	12.5%	40.0%	18.2%	28.6%	16.7%	50.0%

The average lengths of stays in Oregon by Rally participants (before, during and after the Rally) are shown in Table 3.

Table 3

Wagons West 2004 Rally Place of Residency	Number of Days in Oregon			
	Pre Rally	Rally	Post Rally	Total
California	8.6	7.2	3.9	19.7
Washington	3.0	7.5	2.7	13.2
Colorado	6.3	5.0	3.5	14.8
Arizona	14.7	6.8	3.7	25.2
Texas	12.4	7.4	5.7	25.5
Nevada	8.3	8.2	4.2	20.7
Minnesota	3.7	12.2	5.0	20.9
All Participants	8.7	7.4	4.1	20.2

As shown in Table 3, the average length of stay of all participants in Oregon was just over 20 days, including almost 7.5 days in the Salem area, 2.5 days longer than the run of the Rally itself.

The Rally Impacts

Rally Participants

On the basis of the survey responses, as applied to the entire population of Rally participants (based on number of rigs), the estimated spending by the participants before, during and after the Rally are presented in Table 4. These averages do not include report major, unique purchases for vehicles and other items that were excluded to eliminate any skewing of the averages (but included in the total spending and impact analysis).

Table 4

Wagons West 2004 Rally Residency	Average Per Rig Spending			
	Pre Rally	Rally	Post Rally	Total
California	\$593	\$333	\$284	\$1,210
Washington	296	246	300	842
Colorado	810	290	430	1,530
Arizona	891	418	209	1,518
Texas	814	343	643	1,800
Nevada	633	500	417	1,550
Minnesota	350	517	300	1,167
All Other 17 States/Provinces	<u>784</u>	<u>297</u>	<u>297</u>	<u>1,378</u>
Average of All Participants	<u>\$624</u>	<u>\$329</u>	<u>\$316</u>	<u>\$1,269</u>

As shown in Table 4, Rally participants are estimated to have spent an average of \$624 per party in Oregon before arriving in Salem, an average of \$71 per day.

During the Rally, the estimated spending per rig dropped to \$329, about \$44 per day. Those expenditure estimates do not include a Rally fee of \$175 per person which was used by the Rally

organizer to pay for the costs of staging the Rally. Because some meals were provided for the participants during the Rally, expenditures for meals and groceries declined during the Rally as compared with pre-Rally expenditures.

After the Rally, participants expected to spend about \$316 over 4.1 days – an average of \$77 per day. Table 5 on the next page presents a summary of the reported and expected expenditures of Rally participants before, during and after the Rally, by type of expenditures.

Table 5

Wagons West 2004 Rally Expenditure Type	Spending by Type			Total
	Pre-Rally	During Rally	Post-Rally	
Campground Fees	\$112	\$30	\$66	\$207
Restaurants	90	37	46	173
Gas/Diesel	147	21	80	249
Groceries	74	33	36	143
Retail Purchases	101	115	36	252
Repairs, Parts	76	67	36	179
Entertainment	18	11	13	42
Other	<u>5</u>	<u>16</u>	<u>2</u>	<u>23</u>
Total	<u>\$624</u>	<u>\$329</u>	<u>\$316</u>	<u>\$1,268</u>

Using the above average spending and reported extraordinary expenditures, it is estimated that participant spending (new dollars) in the Salem area during the Rally ranged between \$100,000 and \$120,000. Other areas of Oregon are estimated to have received between \$300,000 and \$360,000 in new dollars both before and after the Rally.

Using multipliers developed by the Bureau of Economic Analysis (US Department of Commerce), total economic impacts resulting from the initial spending by Rally participants are estimated to range from \$640,000 to \$780,000. Of the total economic impacts from participant spending, amounts paid to Oregon residents in the form of wages and salaries are estimated is range from \$187,000 to \$227,000, supporting 11 to 13 jobs.

Table 6

Wagons West 2004 Rally Participant Expenditures	Participant Spending			
	Initial Spending	Total Economic Impacts	Earnings Impacts	Job Impacts
Spending in the Salem area	\$100,000 to \$120,000	\$160,000 to \$190,000	\$47,000 to \$57,000	3.0
Spending in other areas of Oregon	<u>\$300,000 to \$360,000</u>	<u>\$480,000 to \$590,000</u>	<u>\$140,000 to \$170,000</u>	<u>8.0 to 10.0</u>
Total spending in Oregon	<u>\$400,000 to \$480,000</u>	<u>\$640,000 to \$780,000</u>	<u>\$187,000 to \$227,000</u>	<u>11.0 to 13.0</u>

Rally Organizer

The Rally organizer, Bounders United, Inc., estimated its total expenditures in conjunction with the Wagons West 2004 Rally is be approximately \$102,000. These expenditures (all made in the Salem area) included facility rentals and services at the Oregon State Fair and Exposition Center, catering, entertainment and other direct costs of the Rally. Using the BEA multipliers, the total impacts of those expenditures are estimated to be \$165,000, including \$46,000 paid in earnings that support 3.5 full-time equivalent jobs.

Total Economic Impacts

Table 7 presents a summary of the total estimated impacts resulting from the staging of the Wagons West 2004 Rally at the Oregon State Fair and Exposition Center in Salem, Oregon.

Table 7

Wagons West 2004 Rally Expenditures	All Sources			
	Initial Spending	Total Economic Impacts	Earnings Impacts	Job Impacts
Spending in the Salem area				
Participants	\$100,000 to \$120,000	\$160,000 to \$190,000	\$47,000 to \$57,000	3.0
Organizer	<u>\$102,000</u>	<u>\$165,000</u>	<u>\$46,000</u>	<u>3.5</u>
Total spending in the Salem area	<u>\$202,000 to \$222,000</u>	<u>\$325,000 to \$355,000</u>	<u>\$93,000 to \$103,000</u>	<u>6.5</u>
Spending in other areas of Oregon	<u>\$300,000 to \$360,000</u>	<u>\$480,000 to \$590,000</u>	<u>\$140,000 to \$170,000</u>	<u>8.0 to 10.0</u>
Total spending in Oregon	<u>\$502,000 to \$582,000</u>	<u>\$805,000 to \$945,000</u>	<u>\$233,000 to \$273,000</u>	<u>14.5 to 16.5</u>

Exhibit

Bounders United 2004 Wagons West Rally

September 28 to October 2, 2004

Exhibit A

Please take a few minutes to complete this form as best as possible and return it (where to be indicated).

A. State of Residence _____

B. Number of people in your travel party. _____ people

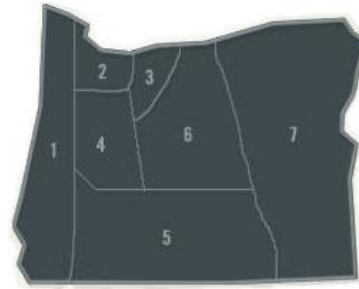
C. How many days have/will you spend in the Salem area in conjunction with the Wagons West Rally? _____ days

D. Prior to arriving in the Salem area for the Rally, how many days did you spend in other areas in the State of Oregon? _____ days

E. After the Rally is over, how many additional days do you plan to spend in other areas in the State of Oregon? _____ days

F. Using the map to the Right, what areas of Oregon did/will you visit before and after the Wagons West Rally in Salem?

- 1. The Coast
- 2. Portland
- 3. Mt. Hood/Gorge
- 4. Willamette Valley
- 5. Southern Oregon
- 6. Central Oregon
- 7. Eastern Oregon



G. To the best of your records and expectations, please fill in the amounts spent (anticipated to be spent), by type, in Salem and other parts of Oregon before, during and after the Wagons West Rally.

1. Campground fees (excluding Rally fees)

2. Hotel/motel

3. Restaurant meals and beverage

4. Gas/diesel

5. Groceries

6. Other retail purchases

7. Repairs, parts and supplies

8. Entertainment, admission fees, etc.

9. Other (describe) _____

	Spending Before Rally in Other Parts of Oregon	Spending During Rally in the Salem area	Spending After Rally in Other parts of Oregon
1. Campground fees (excluding Rally fees)	\$	\$	\$
2. Hotel/motel	\$	\$	\$
3. Restaurant meals and beverage	\$	\$	\$
4. Gas/diesel	\$	\$	\$
5. Groceries	\$	\$	\$
6. Other retail purchases	\$	\$	\$
7. Repairs, parts and supplies	\$	\$	\$
8. Entertainment, admission fees, etc.	\$	\$	\$
9. Other (describe) _____	\$	\$	\$