

USA Cycling Masters National Championships 2012 Economic Impact Study Final Results

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Prepared for:

Visit Bend and USA Cycling

Prepared by:

RRC Associates, Inc.

4940 Pearl East Circle, Ste 103

Boulder, CO 80301

303/449-6558

www.rrcassoc.com

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Introduction and Methodology

This report summarizes the final results of survey research conducted for Visit Bend and USA Cycling by RRC Associates of Boulder, Colorado during and immediately following the 2012 USA Cycling Masters Road National Championships, held September 5-9, 2012, in Bend and the surrounding area. The primary intent of the research was to estimate the economic impact of the USA Cycling Masters Road National Championship events in the Central Oregon area.

The data which form the foundation of this report were collected through two survey questionnaires with largely similar content: a paper survey of participants conducted at event registration, and a post-event web-based survey of participants. Both surveys were anonymous. The post-event survey included an incentive drawing for free deluxe lodging at next year's Masters National Championships. It is likely that many participants filled out both the pre- and post-event surveys.

A total of 898 individuals participated in the 2012 USA Cycling Masters National Championships. The registration survey had 312 respondents and the post-event survey had 277 respondents. Insofar as most travel parties contained more than one racer, it may be that a comparatively larger share of total participant parties are represented. Overall, results for the two surveys were highly consistent with one another, adding confidence in the results. Where possible, the results from both surveys have been merged together to maximize the sample size. Table 1 below summarizes selected key findings from the research.

Table 1 - Summary of Selected Key Findings

Economic Measure**	Amount
Total race participants	898
Number of participants who were local residents	24
Number of participants who were visitors to the area	874
Average number of racers per travel party	2.15
Average number of non-racers per travel party	0.73
Average number of non-racers <u>per racer</u> in travel party	0.34
Average nights stayed in area*	5.35
Average total trip spend per travel party in the Central Oregon area	\$1,778
Direct economic significance (residents and non-residents)	\$788,455
Direct economic impact (non-residents only)	\$783,469
Secondary economic impact (non-resident induced and indirect effects)	\$481,267
Total economic impact (Direct economic impact plus secondary impact, non-residents only)**	\$1,264,736
Total economic significance (Direct economic significance plus secondary impact, residents plus non-residents combined)**	\$1,272,541

* Non-residents only

** Excluding airfare and expenditures outside of the Central Oregon area.

In addition to collecting data about the economic impact of the USA Cycling Masters Road National Championships, the surveys collected other information useful for understanding and potentially improving the event, such as detailed demographic and trip characteristics, previous experience in Bend, satisfaction with Bend, and suggestions for improving the event in the future.

Survey Results

Participant Demographics

- **Geographic origin:** Table 2 below indicates the state in which survey respondents have their primary residence. Approximately 97 percent of participants were visitors from outside Central Oregon. The largest share of respondents reside in California (33 percent), followed by Washington (12 percent), Colorado (9 percent), and Oregon (8 percent, inclusive of Central Oregon). In all, the race drew participants from 40 states.

Table 2 - State of Primary Residence

State of primary residence:	Percentage
California	33.2%
Washington	11.7
Colorado	9.1
Oregon (incl. 3% from Central OR)	8.2
Idaho	5.3
Utah	3.2
Arizona	2.7
Minnesota	2.0
Tennessee	2.0
Texas	2.0
Wisconsin	2.0
Nevada	1.8
Wyoming	1.6
All other states combined	15.5%

- **Party size and composition:** Among non-resident (non-Central Oregon) participants, the average travel party size was 2.9 people. Of these, 2.2 were race participants.
- **Gender:** Three-quarters (75 percent) of respondents were male, which is likely a reflection of the male skew of actual race participants.
- **Age:** Not surprisingly, given the nature of a Masters competition, all respondents to the surveys were aged 35 and older. The largest age group was the 45 to 54 year old segment which accounted for 38 percent of respondents.

- **Household Income:** Among survey respondents willing to share their annual pre-tax household income, over two thirds (68 percent) reported income of \$100,000 or above, indicating that the USAC Road Masters National Championships attracts an affluent mix of participants.

Table 3 - Demographic Characteristics of Respondents

	Percentage
Gender	
Male	75%
Female	25
Age	
35 – 44 years old	21%
45 – 54 years old	38
55 – 64 years old	26
65 – 74 years old	12
75+	2
Annual Household Income Before Taxes	
<\$25,000	2%
\$25,000 - \$49,999	6
\$50,000 - \$74,999	12
\$75,000 - \$99,999	13
\$100,000 - \$199,999	41
\$200,000+	27

Trip Characteristics

- **Information sources used in planning the trip:** Participants were asked to identify all the information sources used in planning their trip to Central Oregon. The most commonly used information sources were the Visit Bend website (43 percent) and the USA Cycling website (35 percent).

Table 4 - Information Sources Used to Plan This Trip to Central Oregon

What information sources did you use to plan this trip to Central Oregon?	Percentage using information source
Visit Bend website	43%
USA Cycling website	35
None	9
Prior visit experience	6
Word of mouth	3
Other website	2
Other	2

- **Accommodations characteristics:** The vast majority of overnight visitors stayed in lodging in Bend (93 percent). A total of 79 percent of travel parties stayed in hotels or rented condos/townhomes/houses. The average travel party stayed 5.4 nights in Central Oregon during the event and used 1.5 lodging units.

Table 5 - Overnight Visitors: Location of Lodging

In What Community is Your Lodging?	Percentage
Bend	93%
Redmond	1
Sunriver	3
Other	2

Table 6 - Overnight Visitors: Type of Lodging

What Type of Lodging Did You Use?	Percentage
Hotel/Motel	45%
Rented Condo/Townhouse/House	34
With Friends or Relatives in Their Home	9
Host Housing	6
At Home	2
RV/Camper Van/Tent Camping	2
Other	1

- **Travel characteristics:** The majority of respondents (71 percent) drove to the USAC Masters National Championships. This is likely a reflection of the fact that 58 percent of respondents were from California, Washington, Oregon, and Idaho. Additionally, a large portion of participants are likely to have arrived with multiple bicycles due to the time trial and road races. Of those who did fly (29 percent), the largest portion arrived in Portland (44 percent), followed by Seattle (28 percent), Redmond/Bend (24 percent), and some other airport (5 percent). The average per person airline ticket cost was \$350.

Car rental patterns closely mirrored flight patterns, with 28 percent of respondents indicating that they rented a car. Just under half rented in Portland (46 percent), with 27 percent renting in Seattle, 19 percent renting in Richmond/Bend, and 9 percent renting in another location. The average amount spent on car rental for the travel party was \$433.

- **Activity participation during visit:** By far the most common activity which participants engaged in during the event was dining out (87 percent of respondents), followed by

biking other than the races (69 percent). Over half of respondents shopped (58 percent) and 29 percent visited a brewery.

Table 7 - Other Activities in Central Oregon During Visit

Which Activities Did You Do During Your Trip?	Percentage
Dining Out	87%
Biking (other than races)	69
Shopping	58
Brewery Visit	29
Hiking/Trail Running	19
Music/Nightlife	13
Arts/Cultural Events	12%
Family Event	8
Rafting/Canoe/Kayak	6
Fishing	2
Museums	2
Guided Tour	0
<i>None of these</i>	2

Importance of Bend Location in Decision to Participate in Race

- Importance of Bend location in decision to participate: Survey respondents were asked to identify how important Bend was in their decision to participate in the races on an 11 point scale, where 0 was “I would have participated wherever the races were held,” 5 was “half the reason I participated was the races were in Bend,” and 10 was “my only reason for participating was that the races were in Bend.” More than three quarters of participants (77 percent) said that the fact that Bend was the host location of the races this year was half or more of the reason that they chose to participate in the races – underscoring the importance of the Bend location in driving participation.

Likelihood to Recommend and Return to Bend, and Suggestions for Improving Event

- Likelihood to recommend Bend as a place to visit: A “net promoter” question was asked in an effort to measure Bend’s destination appeal. Respondents were asked “How likely would you be to recommend Bend to a friend, family member or colleague as a place to visit?,” using an 11-point scale where 0=“not at all likely,” 5=“neutral,” and 10=“extremely likely.” The results are intended to measure how well Bend was regarded among the participant base. This type of question is also asked in many other industries and is considered an important benchmark of a destination’s, company’s, or event’s performance and potential for positive word of mouth.

Respondents who give rating scores of 9 or 10 (70 percent of race participants) are often termed “promoters” of the item being rated, likely to speak of it highly. Respondents who give scores of 7 or 8 (21 percent of participants) are often termed “passive supporters.” Respondents who give ratings of 6 or below (8 percent of participants) are often termed “detractors”—likely to be un-enthusiastic or critical about the destination or event. As such, Bend’s “net promoter score” (percentage of promoters minus percentage of detractors) among race participants was 62 percent.

- **Likelihood of return to Bend:** On an 11-point scale (where 0=“not at all likely” and 10=“extremely likely”), 50 percent of participants indicated that they are extremely likely (% 9 or 10) to return to Bend for a future visit for a reason other than future USAC championships.
- **What can we do to make the event better for next year?** Based on a coding of open-ended comments, the most common suggestion for improvement next year related to the criterium courses (18 percent) with riders suggesting safety or other improvements to both the NW Crossing and Downtown courses. There were also a number of responses suggesting improvements to the road course (9 percent), however opinion was mixed as to whether a return to the 2011 course would represent an improvement over this year (7 percent suggested this year was better than 2011). A complete listing of the verbatim comments is included in the appendix.

Table 8 - Summary of Suggestions to Make the Event Better for Next Year

What can we do to make the event better for next year?	Percentage Identifying Potential Improvement
Great event / nothing can be improved	25%
Improve criterium courses (NW Crossing & Downtown)	18
Road course can be improved / return to 2011 course	9
Liked this year's courses better than 2011	7
Move courses closer to Bend	5
Registration improvement	5%
More medical support on hand	4
Increase local discounts and partners	4
Make sure roads are closed to cars / finish road construction	3
Improve directions to/from events	2
Schedule of events can be improved	2%
Hold event at a different time of year	2
Increase advertising to fans / locals	2
Hold an event or party during, before, or after the week of races	2
Have more food vendors at Mt. Bachelor	2
Water at race site/ neutral bottle support	2

Previous Visitation and Event Participation in Bend

- Previous visitation of Central Oregon: Participants were highly familiar with Central Oregon as a destination, with nearly three quarters (73 percent) indicating that they had previously visited Central Oregon. Of those who had visited, the average number of previous visits was 6.8.

Table 9 - Previous Visits to Central Oregon

Have you previously visited Central Oregon?	Percentage
Yes	73%
No	27
<i>Average number of previous visits (among those who have previously visited Central Oregon)</i>	6.8

- Participation in previous events in Bend: Based on the web survey results, 55 percent of 2012 participants also participated in the 2011 Masters Road Championships in Bend. Additionally, 39 percent had participated in another event in Bend in the past.
- Recommendation of Bend: Of those who had participated in a previous event in Bend (either cycling or another event), 96% reported that they had recommended Bend as a place to visit. Thus, return cycling participants are clearly strong advocates for Bend.
- Interest in moving to or purchasing real estate in Bend: A remarkably high 47 percent of those who had participated in the 2012 Masters Championships or another previous event in Bend had considered moving to Bend or purchasing real estate in Bend.
- Actions taken toward moving to Bend: The survey asked those who had considered moving to Bend or purchasing real estate to describe any actions they have taken in this regard (purchased a home in Bend, worked with an agent in Bend, looked for a job in Bend, etc.) The verbatim answers are included in the appendix. When the open ended answers are coded, 68 percent of those who have considered moving to Bend have actively pursued the idea in one or more of the following ways: looked at real estate listings, checked job postings, discussed the possibility with friends and family, or actually purchased real estate in Central Oregon.

Table 10 - Other Previous Event Participation in Bend (Web Survey)

Respondent Characteristics	Percentage
Participated in 2011 Masters Road Championships in Bend	55%
Participated in another event in Bend in the past	39%
In what year was the event? <i>If participated in an event in Bend previously other than the 2011 Masters Road Championships</i>	
2006 or Prior	16%
2007	3
2008	2
2009	10
2010	24
2011	22
2012	24
Actions Taken Since Your Previous Visit <i>If participated in 2011 Masters Road Championships or other event in Bend previously</i>	
Recommended Bend to a friend or colleague as a place to visit	96%
Considered moving to Bend or purchasing real estate in Bend	47%

Expenditures, Direct Economic Impact and Total Economic Impact

Event-Related Expenditures

Respondents were asked to indicate the number of individuals in their travel party, the number of nights their travel party was staying in Bend, and their trip spend in Central Oregon in a variety of purchase categories for the whole travel party. A travel party was defined in the surveys as, “all persons for whom lodging is paid as a group, or for those not staying overnight in Central Oregon, a travel party is all persons who drove to Bend together.”

Using these data it is possible to estimate average per capita spending per night (racers and non-racers in the travel party are both factored into the calculations). Table 11 to follow summarizes expenditures by item purchased by residency of respondent (Central Oregon resident vs. non-Central Oregon resident).

Table 11 - Expenditures Per Capita Per Night

Per Capita Per Night Spend by Category	Non-Residents	Central Oregon Residents
Lodging expenditures	\$50.46	\$0.00
Restaurant expenditures	\$21.90	\$19.81
Grocery/Convenience Store expenditures	\$11.62	\$8.66
Shopping expenditures	\$8.44	\$3.43
Amusements and Attractions expenditures	\$1.72	\$0.19
Gas Expenditures	\$8.41	\$6.72
Other expenditures	\$6.52	\$5.62
Car Rental	\$1.26	\$0.00
Other Not already Listed Above	\$4.91	\$0.82
Total Spending Per Capita Per Night	\$115.25	\$45.25

In addition to travel party spending captured by the surveys, Visit Bend and USA Cycling also provided estimates of additional visitation and spending attributable to the event. These numbers are summarized in Table 12 below. Visit Bend and USA Cycling estimate that a total of 371 additional people unaffiliated with racer travel parties visited Bend due to the races – including journalists, USAC staff and officials, vendors and spectators. In the economic significance and economic impact calculations which follow later in this report, per capita per night spending by staff and officials, vendors, journalists, and spectators are assumed to be the same as those identified for visiting race participants and their travel parties in the survey work (e.g. average of \$115.25 per person per day).

Additionally, Visit Bend estimates that an additional \$65,000 in ancillary spending occurred in Bend associated with medical services, supplies, and contractors.

Table 12 - Additional Visitation and Spending Estimates Provided by Visit Bend

Visitor Type	Number of Visitors	Average Number of Nights Stayed
USA Cycling staff & officials	31	7
Vendors	17	5
Journalists & photographers	23	6
Spectators	300	4

Additional Spend	Amount
Medical spending	\$25,000
Event supplies purchased in Central Oregon	\$26,000
Third party contractors	\$14,000
Total additional spend	\$65,000

Terminology

In order to evaluate the economic scope and impacts of the Championships, several economic measures have been calculated: “Direct Economic Significance,” “Direct Economic Impact,” “Secondary Economic Significance/Impact,” and “Total Economic Significance/Impact.”

- “Direct Economic Significance” is a measure of event-related spending by all race participants/attendees and their associated travel parties, regardless of their place of residence (Central Oregon or elsewhere). The very broad measure of “economic significance” can be understood as reflecting all economic activity associated with the bike event. The term “direct” further specifies that the measure is a reflection of first-order economic activity stemming from the spending of participants/attendees. Additional economic effects are incorporated when “secondary” (a.k.a. “multiplier” or “indirect and induced”) economic impacts are included later in this analysis.
- “Direct Economic Impact” is a measure of economic activity associated with only those participants/attendees who are day or overnight visitors to Central Oregon. (It is assumed that all such participants/attendees came to Central Oregon in whole or part due to the races.) Economic activity associated with participants/attendees who reside within Central Oregon are excluded, since it is assumed that they would have spent their discretionary/entertainment dollars on other goods/services/activities in the local area instead of the race events.¹ “Economic impact” is thus a slightly narrower measure than “economic significance,” and it tabulates the incremental “new money” brought into the Central Oregon area by outside visitors attracted to the area as a result of the races.

Again, the term “direct” further specifies that the economic impact evaluation has been limited to first-order economic effects. Secondary/multiplier impacts are included later in this analysis and are in addition to the direct effects.

Note as well that the direct economic significance/impact measures described above differ from raw expenditures, insofar as the economic significance/impact measures both incorporate an adjustment to retail purchases to include retailer margins only, and thus more accurately reflect local economic activity. This methodological step is described in more detail in the “detailed calculations” section to follow.

- “Secondary Economic Significance/Impact” represents the additional economic activity stimulated in the local economy as a result of the direct impacts, and is sometimes referred to as the “multiplier effect.” This includes “indirect” effects associated with the supply chain (e.g. the linen provider which services a hotel) and “induced” effects associated with employees in directly or indirectly affected industries spending their

¹ To the extent that some local and seasonal residents might have left the community to participate in the road national championships were they held elsewhere, hosting the races serves to retain economic activity in the local economy which would have otherwise escaped; and any such economic activity could be credited as “economic impact.” However, it is beyond the scope of this research to quantify any such impact.

wages in the local economy; plus related follow-on rounds of economic activity from these indirect and induced effects. This analysis uses output multipliers calculated by the Minnesota IMPLAN Group for applicable industry sectors for Deschutes County, OR as of 2010, to estimate secondary economic impacts.

- “Total Economic Impact (Significance)” represents the sum of direct and secondary economic impacts (significance).

Summary of Results

The total economic impact of the 2012 USAC Masters Road National Championships is estimated to have been \$1.26 million. This number accounts for the direct and secondary impacts associated with non-resident participants, their travel parties, and ancillary groups only. Total economic significance, which incorporates impacts stimulated by local resident participants as well, is estimated to have been a slightly higher \$1.27 million. Selected key findings are presented in the table below.

Table 13 - Selected Key Economic Activity Estimates

Estimates:	Non-Resident	Central Oregon Resident
Per capita Per Night Total Expenditures	\$115.25	\$45.25
Aggregate Direct Expenditures from Survey Data and Visit Bend Ancillary Data	\$975,079	\$7,727

Estimate	Segments Included	Value
Total Direct Economic Significance	Non-Resident + Resident	\$788,455
Total Direct Economic Impact	Non-Resident Only	\$783,469
Total Economic Significance (Direct + Secondary)	Non-Resident + Resident	\$1,272,541
Total Economic Impact (Direct + Secondary)	Non-Resident Only	\$1,264,736

Detailed Calculations

The worksheets that follow present a detailed outline of the methodology employed in developing the estimates for direct economic impact and significance and total economic impact and significance.

The methodologies for estimating both economic significance and economic impact are essentially identical. As described previously, the key distinction pertains to which groups of attendees are included in the respective economic evaluations. The economic significance evaluation reflects race-related economic activity associated with all race participant/attendee groups, while the economic impact evaluation reflects economic activity associated only with visitors traveling to the area (and thus excludes Central Oregon residents). For both the

economic significance and economic impact evaluations, the following methodological steps were applied:

- Identify Central Oregon residents and non-residents by the zip code provided in the survey. Residents are excluded from the economic impact totals, but included in the economic significance totals.
- Calculate average nights spent in Central Oregon by resident type and average expenditures by category. These expenditure figures are in Table 14 which follows and are calculated at the travel party level and the per capita per night level.
- Use the per capita per night expenditure figures noted above to create spending estimates for visitors, officials, journalists and spectators not captured in the survey data. These data are shown in Table 15 to follow.
- Adjust retail sales to reflect local capture of economic value. Much of the price of retail items reflects manufacturers' costs of creating goods, as well as the costs charged by transporters and wholesalers. Insofar as such manufacturers, transporters and wholesalers are located outside of the Central Oregon region, it is important to exclude those portions of economic value creation from the local economic evaluation, and only include that proportion of economic value represented by the retailer's margin. This step is applied in this analysis to grocery purchases, shopping purchases, gas expenditures, and other expenditures. Based on data reported for Deschutes County in 2010 by the IMPLAN economic modeling system, a grocery retail margin of 28.2 percent, a blended retail margin of 38 percent, and a gas retail margin of 15 percent have been applied to expenditures in these categories. For expenditures described as "other," it is assumed that 50% of these expenditures can be classified as retail, and a blended retail margin of 38 percent is applied to this portion of expenditures. These adjustments are presented in Table 15. These adjustments are applied to the raw retail expenditure figures to derive direct economic impacts and direct economic significance associated with retail purchases.
- Calculate aggregate economic significance and aggregate economic impact by summing the economic activity of appropriate attendee groups. As noted previously, aggregate direct economic significance, estimated at \$788,455, is calculated from the sum of economic activity by all participant/attendee travel parties. Aggregate economic impact, estimated at \$724,508, is calculated from the sum of economic activity of only those race participants and travel parties which are not residents of Central Oregon. Calculations for this are presented in Table 16 to follow.
- Calculate the secondary economic effects of spending in various industry categories using multipliers from the IMPLAN economic modeling system for Deschutes County in 2010. The shopping multiplier is calculated as the average of multipliers for the following retail industry categories: clothing, sporting goods, general merchandise, and

miscellaneous retail. The multiplier for the “Medical, Setup, and Contractor” category of spending is calculated as the average of multipliers for equipment rental, physician offices, ambulatory care, private hospitals, spectator sports companies, and sports promotion. Finally, the multiplier used for “Other expenditures” is assumed to equal the blended shopping multiplier described above.

Table 14 - Economic Impact Worksheet A

Economic or Visitor Descriptor	Non-Residents	Central Oregon Residents	Grand Total Direct Economic Significance (Non-Residents plus Residents)	Subtotal: Direct Economic Impact (Non Residents Only)
Number of USAC Participants	874	24	898	874
Percentage of Total Participants*	97%	3%	100%	97%
Average Number of Nights In Lodging†	5.35	5	5.34	5.35
Average Number of Days in Central Oregon	6.80	5	6.75	6.80
Average Number of Participants Per Travel Party	2.15	1.25	---	---
Number of Non-Participants Per Participant	0.34	0.40	---	---
Average Room Nights Used Per Travel Party	8.67	0	---	---
Number of Travel Parties	406	20	426	406
Total Person-Nights in Bend/Central Oregon	4,675	122	4,797	4,193
Per Travel Party Expenditures Over the Course of the Event				
Lodging Expenditures	\$778.50	\$0.00	\$757.35	\$778.50
Restaurant Expenditures	\$337.80	\$173.30	\$333.33	\$337.80
Grocery/Convenience Store Expenditures	\$179.20	\$75.80	\$176.39	\$179.20
Shopping Expenditures	\$130.20	\$30.00	\$127.48	\$130.20
Amusements and Attractions Expenditures	\$26.60	\$1.70	\$25.92	\$26.60
Gas Expenditures	\$129.70	\$58.80	\$127.77	\$129.70
Other Expenditures	\$100.61	\$49.20	\$99.21	\$100.61
Car Rental	\$19.49	\$0.00	\$18.96	\$19.49
Other Not Already Listed Above	\$75.81	\$7.14	\$73.94	\$75.81
Total expenditures per travel party	\$1,778	\$396	\$1,740	\$1,778
Per Capita Per Night Spend by Category				
Lodging Expenditures	\$50.46	\$0.00	\$49.09	\$50.46
Restaurant Expenditures	\$21.90	\$19.81	\$21.84	\$21.90
Grocery/Convenience Store Expenditures	\$11.62	\$8.66	\$11.54	\$11.62
Shopping Expenditures	\$8.44	\$3.43	\$8.30	\$8.44
Amusements and Attractions Expenditures	\$1.72	\$0.19	\$1.68	\$1.72
Gas Expenditures	\$8.41	\$6.72	\$8.36	\$8.41
Other Expenditures	\$6.52	\$5.62	\$6.50	\$6.52
Car Rental	\$1.26	\$0.00	\$1.23	\$1.26
Other Not Already Listed Above	\$4.91	\$0.82	\$4.80	\$4.91
Total Spending Per Capita Per Night	\$115.25	\$45.25	\$113.35	\$115.25
Aggregate Participant Expenditures Over the Event				
Lodging Expenditures	\$315,739	\$0	\$315,739	\$315,739
Restaurant Expenditures	\$137,003	\$3,382	\$140,385	\$137,003
Grocery/Convenience Store Expenditures	\$72,679	\$1,479	\$74,158	\$72,679
Shopping Expenditures	\$52,806	\$585	\$53,391	\$52,806
Amusements and Attractions Expenditures	\$10,788	\$33	\$10,821	\$10,788
Gas Expenditures	\$52,603	\$1,147	\$53,750	\$52,603
Other Expenditures	\$40,805	\$960	\$41,765	\$40,805
Car Rental	\$7,905	\$0	\$7,905	\$7,905
Other Not Already Listed Above	\$30,747	\$139	\$30,886	\$30,747
Total Participant Travel Party Expenditures	\$721,074	\$7,727	\$728,801	\$721,074

Table 15 - Economic Impact Worksheet B

Economic or Visitor Descriptor	Non-Residents	Central Oregon Residents	Grand Total Direct Economic Significance (Non-Residents + Residents)	Subtotal: Direct Economic Impact (Non Residents Only)
Additional Event-Related Visitation- per Visit Bend estimates				
Number of Officials, Vendors, Journalists	71	---	71	71
Assumed Average Number of Nights	6.2	---		
Total Officials, Vendors and Journalists Person Nights	440	---	440	440
Number of Spectators	300	---	300	300
Assumed Average Number of Nights	6	---	6	6
Number of Spectator Person Nights	1200	---	1200	1200
Total Person nights Officials, Vendors, Journalists, Spectators	1640	---	1640	1640
Aggregate spending by ancillary groups noted above (assume same per capita per day spending as for race participants)				
Lodging Expenditures	\$82,760	\$0	\$82,760	\$82,760
Restaurant Expenditures	\$35,911	\$0	\$35,911	\$35,911
Grocery/Convenience Store Expenditures	\$19,050	\$0	\$19,050	\$19,050
Shopping Expenditures	\$13,841	\$0	\$13,841	\$13,841
Amusements and Attractions Expenditures	\$2,828	\$0	\$2,828	\$2,828
Gas Expenditures	\$13,788	\$0	\$13,788	\$13,788
Other Expenditures	\$10,696	\$0	\$10,696	\$10,696
Car Rental	\$2,072	\$0	\$2,072	\$2,072
Other Not Already Listed Above	\$8,059	\$0	\$8,059	\$8,059
<i>Total Officials, Vendors, Journalists & Spectators Expenditures</i>	\$189,006	\$0	\$189,006	\$189,006
<i>Additional Spending from Medical, Setup, and Contractors</i>	\$65,000	\$0	\$65,000	\$65,000
Total Spectator, Journalist, Vendor, Official, Ops Expenditures	\$254,005	\$0	\$254,005	\$254,005
Total Expenditures Participant Travel Parties + Ancillary Groups	\$975,079	\$7,727	\$982,806	\$975,079
Adjustments for Local Capture of Spending				
Grocery/Convenience Store Expenditures	\$72,679	\$1,479	\$74,158	\$72,679
Grocery/Convenience Store Expenditures Visit Bend Data	\$19,050	\$0	\$19,050	\$19,050
<i>Total Grocery Expenditures</i>	\$91,729	\$1,479	\$93,208	\$91,729
Grocery Margin	0.28	0.28	0.28	0.28
Local Capture of Grocery Spend	\$25,868	\$417	\$26,285	\$25,868
Shopping Expenditures	\$52,806	\$585	\$53,391	\$52,806
Shopping Expenditures Visit Bend Data	\$13,841	\$0	\$13,841	\$13,841
<i>Total Shopping Expenditures</i>	\$66,647	\$585	\$67,232	\$66,647
Shopping Margin Blended Retail Margin**	0.38	0.38	0.38	0.38
Local Capture of Shopping Spend	\$25,326	\$222	\$25,548	\$25,326
Gas Expenditures	\$52,603	\$1,147	\$53,750	\$52,603
Gas Expenditures Visit Bend Data	\$13,788	\$0	\$13,788	\$13,788
<i>Total Gas Expenditures</i>	\$66,391	\$1,147	\$67,539	\$66,391
Gas Margin	0.15	0.15	0.15	0.15
Local Capture of Gas Spend	\$9,959	\$172	\$10,131	\$9,959
Other Expenditures (combined)	\$71,551	\$1,100	\$72,651	\$71,551
Other Expenditures Visit Bend Data (combined)	\$18,755	\$0	\$18,755	\$18,755
<i>Total Other Expenditures</i>	\$90,306	\$1,100	\$91,406	\$90,306
Assumed Percentage Which is Retail	50%	50%	50%	\$0.50
Margin on Retail Portion of Other	0.38	0.38	0.38	\$0.38
Local Capture of Other Spending	\$56,813	\$674	\$57,488	\$56,813

Table 16 - Economic Impact Worksheet C

Economic or Visitor Descriptor	Non-Residents	Central Oregon Residents	Grand Total Direct Economic Significance (Non-Residents + Residents)	Subtotal: Direct Economic Impact (Non Residents Only)
Aggregate Direct Economic Significance and Impact from Race Travel Parties and Ancillary Groups				
Lodging Expenditures	\$398,500	\$0	\$398,500	\$398,500
Restaurant Expenditures	\$172,914	\$3,382	\$176,296	\$172,914
Grocery/Convenience Store Expenditures	\$25,868	\$417	\$26,285	\$25,868
Shopping Expenditures	\$25,326	\$222	\$25,548	\$25,326
Amusements and Attractions Expenditures	\$13,616	\$33	\$13,649	\$13,616
Gas Expenditures	\$9,959	\$172	\$10,131	\$9,959
Other Expenditures (Combined Total)	\$62,311	\$759	\$63,070	\$62,311
Car Rental	\$9,977	\$0	\$9,977	\$9,977
<i>Additional Spending from Medical, Setup, and Contractors</i>	\$65,000	\$0	\$65,000	\$65,000
Total Direct Economic Significance and Impact from Race Travel Parties and Ancillary Groups	\$783,469	\$4,986	\$788,455	\$783,469
Output Multipliers (Deschutes County 2010, per IMPLAN)				
Lodging Expenditures	1.621132	1.621132	1.621132	1.621132
Restaurant Expenditures	1.549222	1.549222	1.549222	1.549222
Grocery/Convenience Store Expenditures	1.592798	1.592798	1.592798	1.592798
Shopping Expenditures**	1.608471	1.608471	1.608471	1.608471
Amusements and Attractions Expenditures	1.708206	1.708206	1.708206	1.708206
Gas Expenditures	1.547102	1.547102	1.547102	1.547102
Other Expenditures (Combined Total)****	1.608471	1.608471	1.608471	1.608471
Car Rental	1.527336	1.527336	1.527336	1.527336
<i>Additional Spending from Medical, Setup, and Contractors***</i>	1.765648	1.765648	1.765648	1.765648
Total (Direct + Indirect + Induced) Economic Impact and Significance Estimates	Overnight Visitors	Central Oregon Residents	Grand Total Economic Significance (Non-Residents + Residents)	Subtotal: Economic Impact (Non Residents Only)
Lodging Expenditures	\$646,020	\$0	\$646,020	\$646,020
Restaurant Expenditures	\$267,882	\$5,239	\$273,121	\$267,882
Grocery/Convenience Store Expenditures	\$41,202	\$664	\$41,866	\$41,202
Shopping Expenditures	\$40,736	\$358	\$41,094	\$40,736
Amusements and Attractions Expenditures	\$23,259	\$57	\$23,316	\$23,259
Gas Expenditures	\$15,407	\$266	\$15,673	\$15,407
Other Expenditures (Combined Total)	\$100,226	\$1,220	\$101,446	\$100,226
Car Rental	\$15,238	\$0	\$15,238	\$15,238
<i>Additional Spending from Medical, Setup, and Contractors</i>	\$114,767	\$0	\$114,767	\$114,767
Total Economic Impacts Including Indirect and Induced Effects	\$1,264,736	\$7,805	\$1,272,541	\$1,264,736

Technical Notes for Economic Impact Worksheets:

† Assumed value .

* Calculation based on response distribution.

**Shopping Margin and Shopping Multipliers are based on averages for the following retail categories: clothing, sporting goods, general merchandise, and miscellaneous.

*** An average of multipliers for: equipment rental, physician offices, ambulatory care, private hospitals, spectator sports companies, and sports promotion.

**** Assumed to equal the shopping multipliers.

Appendix A: Verbatim Comments

Is there anything we can do to make next year's Masters Road National Championships in Bend better?

- Advertise to local community for more spectators
- Almost everything was first class and well supported except for one area: medic support. There were several crashes in the crits on Saturday & Sunday. There was no ambulance on site or within close proximity. Seriously injured racers had to wait 20+ minutes on more than one occasion. This jeopardizes their health and delays everyone else's racing. Also, the medic tent could not provide the name/address of a local hospital so we could drive injured teammates to the ER. That info should be readily available.
- Already have been back this past weekend. Never been before this month. Keep the sky's clear and the smoke away.
- Ambulances should be more readily available for the races, particularly the criteriums.
- arrange for me to win. city was great usa cycling could use some improvements
- Ask Kevin Metcalfe to stay home. He's too talented.
- Awesome
- Be sure that no other master's racers enter the race course until an official direct a rider to do so. A number of men entered the race course while the Women 44-49 were racing and caused one woman to hit the "deck." Also ADD to your RACE BIBLE that if riders enter a race course (i.e. the crit) without authorization they may face immediate DQ from the event. Talking to the men at the start of their own race is a MUTE point -- no accountability or responsibility on their part. On another matter, be clear that although you have "cero" requirements for women above 40+ to enter your Masters Road National Championships that the women should have at least raced the year before prior to attempt entering said championships. Why allow inexperienced women to race at this level? This put the others in danger of women who cannot race or handle their bikes. Lastly be sure to ADD to your RACE BIBLE that riders MUST check-in upon arrival and sign the little form that you proves that they will race an event. We had several instances where the officials were walking around with the clipboard then several riders signed in then. I mean seconds before the gun would have gone off. This was completely unacceptable. This is the highest level of racing and the riders should have this engrained into their brains.
- Bend is a great host city for cycling events.
- Bend is awesome, let me be clear there. We bring the family, invite friends, and everyone loves it. We came early for the Little Woody beer festival which was unreal. However the road race, both this year and last year, just wasn't a good/fair race for most the field. It really is time for something a little flatter that would enable other types of racing than just climbing. Some challenging climbs are good, but other rider types need a shot at a jersey too.
- Bend needs additional camping options

- Best Masters racing venue yet!
- Better crit course. This year's course had the traffic grooves in all the turns, and anytime there are s-turns there are bound to be crashes. Also there should be no cat5 in the older races(55+ and above). I know that the above is more towards the USA Cycling organization than you.
- Better directions around town (our cell phones had sporadic reception, so smart-phone mapping wasn't always available) to the various race sites and to local bike shops (for needed repairs), Old Mill district, etc. etc. Maybe also 1-2 popular (safe) road rides to use on off days for training/easy rest day riding. Local shop/s were too busy to be much help, although "Web Cyclery" stopped what they were doing to give us 10-minutes of advice which we appreciated. It would also be great to have one or two (Thur/Fri &/or Sat nights) bicycle specific presentations in town for the cyclists attending. At CX Nats 1-2 years ago, they had a movie premiere at the old Theater (on Wall St.), then 2nd night they had a great cycling party at the Deschutes Brewery w/food, music etc. I promote the 53rd annual Nevada City Classic in Nor Cal, and we always have at least one night that weekend with a cycling-specific social gathering that draws everyone to a location where they can connect, visit and we use it as a fundraiser of some type for a local non-prof, etc.
- better road course (this one was lame)
- Better, More Challenging, Race Courses for All Events
- Bring back the Aubrey Butte Road course!
- Change the courses to something more reasonable. The Criterium was a crash-fest. If they keep the same course next year I won't come back.
- Change the Crit course
- change the crit course, too many crashes
- Change the criterium course, but that was a USAC issue.
- Change the downtown criterium course. It was a technical course that resulted in too many crashes. I liked the course, but I was involved in crash with 8 other riders and could not complete the race. It happened to too many riders during the many races that took place on the downtown criterium course.
- Change the northwest crossing course to make it safer for less experienced riders.
- Change the road course back to a version of the course used in 2011
- Change the road race course and separate the tt and road race by a day.
- change the route of the race.
- Close off the roads...I had an issue during my Time Trial in Prineville with an ignorant motorist stopping at the finish line. Causing another participant and I to slow abruptly.
- Coffee at the venues, Bend is coffee haven!
- Crit course downtown was a bit risky - corner 5 specifically.
- Criterium course change; both courses were a bit unsafe.
- design criterium courses that are wider. minimum 21feet.
- Don't have the road race at high altitude.
- Don't start the road races at Mt. Bachelor. The races become too short since the descent is basically a neutral section. With the cold temperatures in the morning, I got hypodermic during the initial descent and never recovered. I will not come back to race Mt Bachelor again.
- downtown venue was great!! TT too far away ... only racers traveled the rest of the party stayed at the hotel or the rentals we had.
- Drug control
- Earlier in the summer.
- Either have more food vendors at the venue, or move the start/finish closer to Bend so people don't have to make a long drive back into town to eat after their race and then drive back out to

watch teammates race.

- End of national party in the park with local beer and food for purchase.
- Everything was great but the criterium course in Northwest Crossing had one unsafe corner. I would do it again regardless but if that could be made safer it would be even better, Thanks for the great cycling support!
- Everything was perfect!
- Everything/everybody was very nice. I wish that I could have stayed longer.
- Examine the criterium courses and the crash issues.
- Finish the road construction so that the road race can return to the Awbrey Butte circuit.
- First visit to Bend. Loved the setting. Bend was very hospitable and accommodating and obviously liked having the racers in the City. I thought you did a great job taking care of the racers on the road while racing, closing roads etc. Appreciated some of the discounts offered to us by the merchants. The more the better!
- Food and Drink vendors at Mt. B parking lot for the road races
- get rid of the one pothole on the course that I hit and crashed on. The road race course was great don't change it. I thought the cross roads crit was great, but there were a lot of crashes, maybe it was too difficult for the rider ability?
- Get USAC to pick a safer Crit course than Northwest Crossing.
- Give USA Cycling better directions to events venues including Old Mill District for award ceremonies.
- Go back to the previous road race course! Better for all-arounders, not just climbers.
- Great crit course but a little bumpy, wider turns would make it a little safer, You had major crashes in every age group. Even the women with fifteen riders in the group.
- Great Event and People! Very well planned out.
- Great event, nothing to add to change.
- Great Town lots to do, including just hanging out.
- Hard to improve on this year.
- Have courses closer to bend. Find a safer criterium course. Stagger tandem and individual races on different days as it's hard to race two 84 km races on the same day only two hours apart
- Have enough volunteers to handle registration
- Have enough volunteers to keep things moving. I was so incredibly annoyed by 4 volunteers trying to register all the participants. Totally put me off Bend as a host., incompetent.
- Have some venues at Mt. Bachelor. Food was brats and hot dogs...not very healthy.
- Have water for competitors at race site. Very dry and hot with no water, not good.
- having a rest day between TT, road race, and crit is very nice. That happened in 2011, but 2012 TT & road race were back to back.
- how about having a better expo area at each venue?
- I intended to do more shopping and hoped to purchase some clothing for myself and as gifts, but the shops were closed 2 of the 3 times i tried to shop, and on the third day, they were only open for about 1.5 hrs by the time i got to town. The place rolls up before sunset.
- I love Bend. This was my 3rd visit, and although each time was for a national event (road and cyclocross) I would totally consider returning for a fun vacation in the future
- I loved the criterium course in downtown Bend -- but there are reasons why each race experienced so many crashes. I have theories, but not answers -- crashes impacted these events more than they should have.
- I own a lot on Awbrey Butte and my wife and I ski so we are frequent visitors. To make the Races better and safer next year you can encourage USA Cycling to find another criterium course away

from Northwest Crossing for the older Masters criterium races. Not only is the course unsafe and contributed to a number of serious injuries but the street widths do not all meet the minimum 22 foot requirement prescribed by the USA Cycling rule book. If I come back next year I may not race the criterium and will leave Bend right after the road race. That will cut down on how much I spend in Bend.

- I preferred last year's road race course over this year's road race course. This year, the racing didn't really start until 8 miles before the finish. Last year, there were constant opportunities to attack and try to get away. This year, there was so much downhill and easy climbs before the finish that everybody just cruised until the final decisive climb. The Downtown crit course was too dangerous this year. Neither of us will race that course again. The Northwest Crossing crit course is nice, but it's too tight to support large fields. Even the small fields that raced it had a lot of crashes this year. If you could make it so there are no fires next year, that would be dandy.... :)
- I really can't think of anything.
- I stayed in my own camper. There was no good place to stay close to the race sites. I think letting the racers know that there is plenty of good camping and RV spots that are FREE!
- I thought it was poor planning to have road construction and delays on the day of the Mt Bachelor Road Race, with no advance warning. Hopefully that wont get repeated next year.
- I thought the whole thing was great. I love Bend and will be back several times, even before Masters Road National Championships.
- I was unfortunate to have an accident at the Saturday crit which resulted in a multi-day stay at the Bend hospital. I would recommend an improved discussion/coordination with the urgent care facilities/hospital and race medics prior to the event to provide better communication for those that are hurt - it will happen, part of racing. My family was directed by the medics to go to an urgent care facility, but when we arrived, they indicated that based on my injury, the medics should have directed me to ER (I was transported to ER via ambulance). I was lucky to have family visiting that was able to take me to urgent care - what if I was alone? Also, my family spent more time than I visiting the stores, restaurants, completing the Bend Ale Trail, etc. and repeatedly said they were surprised how many of the purveyors did not know about the race event itself. Maybe there is a way to improve awareness within the Bend Business community - maybe not just the owners, but their workers, to make visitors feel more welcome.
- I would be more likely to attend the Masters NATs for 2013 if they were held July or earlier August.
- I'd participate in more events if they spanned the labor day weekend so I didn't have to take the whole week off work.
- Improve organization at check-in. Things went much more smoothly last year than this year.
- Insist on making the criterium race courses more safe
- Insist on the criterium race courses be more safe for the riders.
- Is there anything we can do to make next year's Masters Road National Championships in Bend better?
- it was a well organized and executed event. Can't think of anything
- It was great
- It was perfect and a nice place to visit. It would be better if I could pump my own gas. :)
- It was perfect!!
- Keep it in Bend forever
- Keep the race venues the same as 2012
- Less technical course, with decent pavement. There were 1000% too many crashes. Ridiculous. And I didn't even crash. Masters bike handling skills are too diverse for that course. Participation would double if the race were held in Southern California. All that being said, Bend is beautiful,

pleasant and I loved the trip. My family had a great time as well. Looking forward to next year.

- Less wrecks or more qualified racers in the 65+ men's crit.
- Let merchants know about the event. I was surprised that several places had no idea (This was very evident in Prineville)
- Location too far to travel again next year.
- longer course for road races
- Longer road course for 50/54
- LOVE BEND AND ALL THE CASCADES LAKES REGION. I AM FROM BOULDER AND AUSTIN AND THINK BEND RANKS UP THERE AT THE TOP. WE PROVIDE CAMPS AND CLINICS FOR CYCLING AND TRAIL RUNNING AROUND THE MTN REGIONS WITH WHOLE FOODS
- Make Mt Bachelor less steep!
- Make parking at the Criterium more available which is hard to do with business
- Make race starts closer to Bend, proper. Include a TT course that does not have a common allergen likely to induce an anaphylactic shock...The freshly cut fields nearly necessitated an E.D. visit.
- Make the criterium course safer, bigger wider course.
- minor: kinda sad more hotels didn't offer SOME small(ish) 5-15% discount for Racers. Otherwise Bend is a GREAT PLACE.
- more of the same!
- more publicity for awards presentation
- More volunteers needed for registration.
- Move the TT and Road Race venues closer to Bend. Had to arise at 4 am in order to get to the races on time.
- need to change the crit course... way too dangerous
- Neutral bottle support on the road cycling course
- No
- no
- no
- no
- no
- no
- no - it was awesome
- No . It was well planned and festive
- No I thought it was fantastic.
- No!
- No, Bend was an excellent host
- No.
- no. it was a wonderful experience
- No. It was GREAT!
- No. The only difference we'll make next year is to bring mountain bikes instead of the tandem and single road bikes. After racing road, we'll opt for cycling variety. We did Pickett's Charge several times when we were into mountain bike racing.
- Nope. It was great.
- Nope. It was spot on perfect. Your town is clean, well organized and friendly. I want to move there!
- Nope. Just keep the courses the same as this year. Thought they were very fair and gave all types of racers the opportunity for success

- Not much
- Not really. Everything was really fantastic. Looking forward to next year. Loved the Hilton Garden. Perfect for a bike race with fridge, micro, coffee maker, restaurant, etc.
- Nothing -this was the best yet! , Keep the TT and Road course the same. great courses! 5th corner in crit was not good!
- on the last day of competition would it be possible to have awards ceremony directly after one's race so participant could depart.
- Only one thing: A little more organization around registration the day before the races begin. We are arriving that day and have to race hard the next few days -- probably something we trained the whole season for. To have to stand around for an hour or more in the sun doesn't sound like a big deal, but for an amateur athlete trying to do our best, we would be better served resting, eating, working on our bikes, riding around Bend, etc.....vs on our feet. At a minimum, having a line that is out of the sun would be nice. Thanks for the consideration.
- open registration earlier in the day
- Order some warmer mornings for race days! It was a good stay; I enjoyed the visit.
- Overall we had a great experience.
- Parking in town was a little hard sometimes an adjacent lot with a shuttle would help us and not burden the non- racers.
- Partner with an airline to offer West Coast travelers a more affordable flight to Redmond. Many have to fly into EUG or PDX and then rent cars and drive 2+ hrs to Bend.
- pave the time trial course before next year.
- Perhaps a pre- or post- party where participants could get to know one another away from the pressure of competition.
- Please change the Criterium Course to be safer. Too many needless crashes.
- Please keep the road race and criterium course the same for next year's event. This year's courses were much better than last year's courses. Thank you for changing them.
- Provide list of hotels and restaurants that offer a Racer's discount
- Provide on-site emergency medical services for the criterium races. Each crash on the NW Crossing course resulted in a long wait while paramedics were called, drove to the crash location and departed for the hospital. At least 20 minutes could be saved if the paramedics were already at the course.
- Provide water at race venue.
- Put a day of rest between the 45+ TT and Road Race so we can do all three events. Start on a Tuesday if needed. That is one of the reasons for the poor TT attendance plus it is an unfair advantage to the riders that do both events. Keep the current TT course. NO SKYLINER!!! Later race would bring out better crowd attendance during the crit on Saturday. Larger categories 50+, 45+ should go after the 35+. Like the same day packet pickup. Like the Awbrey Butte Circuit Race better. More of a race. Bachelor course riders sat in and wait for the drag race to the top. Not much of a race. 45+ road race should be the same length as the 40-44 race.
- reduce the altitude in the mountains
- registration/check in area was not very efficiently laid out and very cumbersome
- Return road race course to closer-to-Bend, like 2011.
- Return the Road Championships to the old course, but with the finish line on some wider roads leading to the finish if possible. The old course was more challenging. Better "forced" selection. Less of a group ride with a hill TT @ the end. It was ok, but liked the old course better.
- Reverse the direction of the 2012 downtown criterium course or go back to the 2011 course.
- Re-work Downtown Crit course

- Safer criterium courses.
- Shorten the number of days of racing to three. We started racing on Wednesday and my last race was late in the day on Sunday. I had to skip my last race to get home by Monday morning for work. No races should be held late in the day on Sunday. Everyone is over it by then.
- steeper finishing hill
- The championships were excellent. I have participated both years and enjoyed the courses, the people and the community. Please review the calendar for the worlds master road championships and the masters world games being held next year in August so that the athletes can participate in as many of these masters events. Thank you.
- The course choice for last day of Masters Nationals Criterium Championship was poor. One corner was too dangerous. The course beat many of the competitors not the actual cyclists which is the way it should be.
- The courses need to be marked, in advance, with either markings on the road, sprinkler flags, or cardboard signs at each intersection, and delineating the start and finish. If you are indeed going to host a National Championship, then you need to present it as a National event, and mark the course in advance so that riders can practice where the course is located.
- The criterium race was much too dangerous. Several accidents around the same area (curves) Maybe change location for this race.
- The one major problem was the Northwest Crossing Course. Way too dangerous. There were 3 crashes in my race and the race was held up 40 minutes. I have to believe no one consulted a racer. There were two 30 mph corners that went from 150 feet wide to 35 feet wide. You just cannot funnel everyone though safely. It really ruined a perfect trip. I came 850 miles to race and did not. Turned out to be a wise decision. I am planning to come back next year, if it is the same course I will cut my trip by three days.
- The Place is awesome. I liked the previous course better. It was more spectator friendly. They can see racers more times.
- The road race course needs to be better organized. I loved the Cascades Lake course and hope it is the road race for next year. However, there was a major mishap in my race that I want to bring to your attention. I raced in the 45+ women which started a little later than the men 45+. Because the men finished before us and there were 110 men in that race, they wanted to leave the course before we finished. For this reason, the corner marshal at the right turn before the 1K to finish sign was not at the hairpin corner. Rather, he was down the road where cars were coming down on the left side of the road from Mt Bachelor. This road was supposed to be closed to all cars! I was in a group of 3 about a minute behind the first place woman when we came to that turn. I followed the woman in front of me to where the corner marshal was waving his hand for us to turn. It was about 75 feet beyond where the hairpin turn actually was. We were confused about where to turn. The woman behind me, however, who was struggling all the way up the last 5 miles behind us took the hairpin corner where the barricades and dirt were. She did not follow us to where the corner marshal was standing and waving us through. I didn't know this. When I jumped around the woman who led me through the turn where the corner marshal was, I saw the woman who had been behind me 75 feet up the road on the right side of the road. I didn't know what happened and was unbelievably frustrated. The other woman and myself were on the left side of the road where the corner marshal had waved us through. Cars were coming down the road, albeit slowly, headed for us. There was no official with us, motorcycle, etc... I was unable to bridge the gap to the woman who had turned early. I got third place. I was very disappointed that I didn't have an opportunity to sprint for second because of the confusion and disorganization at the turn. I should have spoken with an official afterward - or the technical director, but was so upset and frustrated that I didn't think of it until later after the awards ceremony when the second place woman apologized to both me and the fourth place finisher for the unsportsmanship turn she took. The next day I did speak to

the technical director about it just so he knew and would make sure that the corner was clearly marked with corner marshals for the tandem race which I was also racing in. Sure enough, when we got to that turn on the tandem, it was much better marked and there were two corner marshals at the correct location. It was very clear where to turn - and there were no cars coming down the road. So, I would suggest that better training of corner marshals and better communication from the finish to the 1K mark to make sure that cars aren't allowed on that stretch during the end of the races. I hope that you will offer the individual 45+ men and women's road races NOT on the same day as the tandem races (as you did this year in 2012. This allows us to compete in both races. In 2011, my individual road race and tandem road races were scheduled on the same day so I had to choose between the two races. I would like the opportunity to race in both. I prefer the Skyliner TT than the TT in Prineville, but that is because flat riding isn't my strength and the Skyliner TT had a little of everything included. I'm writing all this because I'm hoping that next year the race will be better organized and managed - with corner marshals trained and knowing where they need to be, and no cars coming down the 1K road to the finish. I loved the race course (Cascade Lakes course) and hope that it is offered again. I'm also hoping that you schedule the individual 45+ men and 45+ women on a different day than the tandem races as was done this year. It was great to be able to race in both races since last year I had to choose which race to compete in because the races were scheduled on the same day. Thanks for taking the time to read my email,

- The venue / town was great! Everything was wonderful. Thanks
- There is no information on how to access the work of photographers who took photos during the event. I'd love to have some photos of myself racing there but can't find any central point of information on who shot or where to see their work.
- There was a minimal first aid presence at the race venues, and when friends crashed in the criterium and chose to have companions take them to an ER, they were unable to find race staff who could tell them where the hospital is located. A basic medical response plan would seem to be a most fundamental component for hosting a bicycle race.
- time trial course flatter, and closer to town.
- too much downhill on road races on a cool morning
- USA Cycling could provide better driving directions to the courses ahead of the event. But, the event was very well done.
- Use the same race courses as this year
- Use the same TT and Road Courses and replace the downtown Crit course.
- Use the same TT course!
- Was perfect.
- We arrived on Wednesday in the middle of the day, and there was no place for us to pick up our numbers for the Thursday race until 7:00 am the morning of the race. This made the morning more stressful than it needed to be. It would be nice to have a place to pickup our numbers throughout the day before the race.
- We love Bend. Include a map of the area in the race packet. Some roads are confusing & hard to find and we had to google map everything. Also, please reconsider the crit race course.northwest crossing. Or change the women's race category for 50-54, no cat 4's. Too many crashes this year. Thanks!
- What was done this year was perfect.
- Work with road construction to minimize road delays to venues. Encourage more locals to come out and enjoy the racing. The race course downtown wasn't well attended.
- Yes very poor no ambulance service on hand for the races. Both course not safe. First downtown last course to tight.ned the hole road. Northcrossing just plain bad/ bad/ bad. Need bigger course like maybe one mile and safe. Let riders check the course out. 3 times the races got stopped in the

65+ no ambulance on hand. one time in the 60+ .same corner. Need just to think before picking courses. Riders said they would not race there if they use the same courses. Time trail 46 miles from Bend one way. Road races to long and pretty hilly. Time trails need to be 20 KM and 30 KM safe tons of time. call me i can say a lot about this. 410 882-9023 Bobby. Sorry but the truth needs to come out.

- Yes, move it somewhere where it does not cost so goddamned much money to attend. Three fucking years in Bend? Is someone at USA Cycling getting kickbacks from the Bend Chamber of Commerce? Fuck.
- Yes. The time trial and road race courses were very good. The criterium courses were too short, too many corners and far too dangerous with far too many crashes in all the different categories. I spent 5 days in the hospital due to the negligence of a fellow rider. The dangerous courses tended to magnify the poor riding habits of some of the bad apples and I couldn't believe how many crashes occurred especially with riders who are supposed to be national caliber riders. I won't ride the criterium next year and won't recommend than anyone else do so either unless the promoters are serious about providing safe courses. I've raced for over 20 years and have never seen or heard about so many crashes during the course of two days of criterium racing. It was really a disgrace and really too bad because Bend is just a fabulous venue so to put the sour note into the mix does a disservice to Bend. Masters racers don't want to get hurt but we all want to compete so asking us to ride dangerous courses can only lead to problems. Now, my family wants me to quit racing so this has been a difficult time for me, not to mention another 8 weeks to recover from broken bones and collapsed lung. Don't misinterpret my comments, though, I loved Bend.
- you provided an email with a list of discounts from local vendors prior to the race. I would include this in the race bible next year (the tech guide).

Have you considered moving to Bend or purchasing real estate in Bend?

Those responding "Yes" were then asked:

Please describe any actions you have taken in this regard (purchased a home in Bend, worked with an agent in Bend, looked for a job in Bend, etc.).

- Already own a home in Bend, have looked at purchasing other investment property.
- Bought a house in Sunriver
- Casually looked at house options.
- Chatted with folks who have places.
- Checked home prices, went on home tours , and did a job search.
- Contacted real estate agent. Currently on his email list.
- Daydreaming only, and aware that my company has a branch in Redmond, so it wouldn't be hard to find a job....
- I bought a house here
- I discussed it with friends that have purchased in Bend.
- I have just told my husband that I want to retire in Bend.
- I have looked for a job in Bend, but not applied anywhere.
- I own a hproperty in Bend.

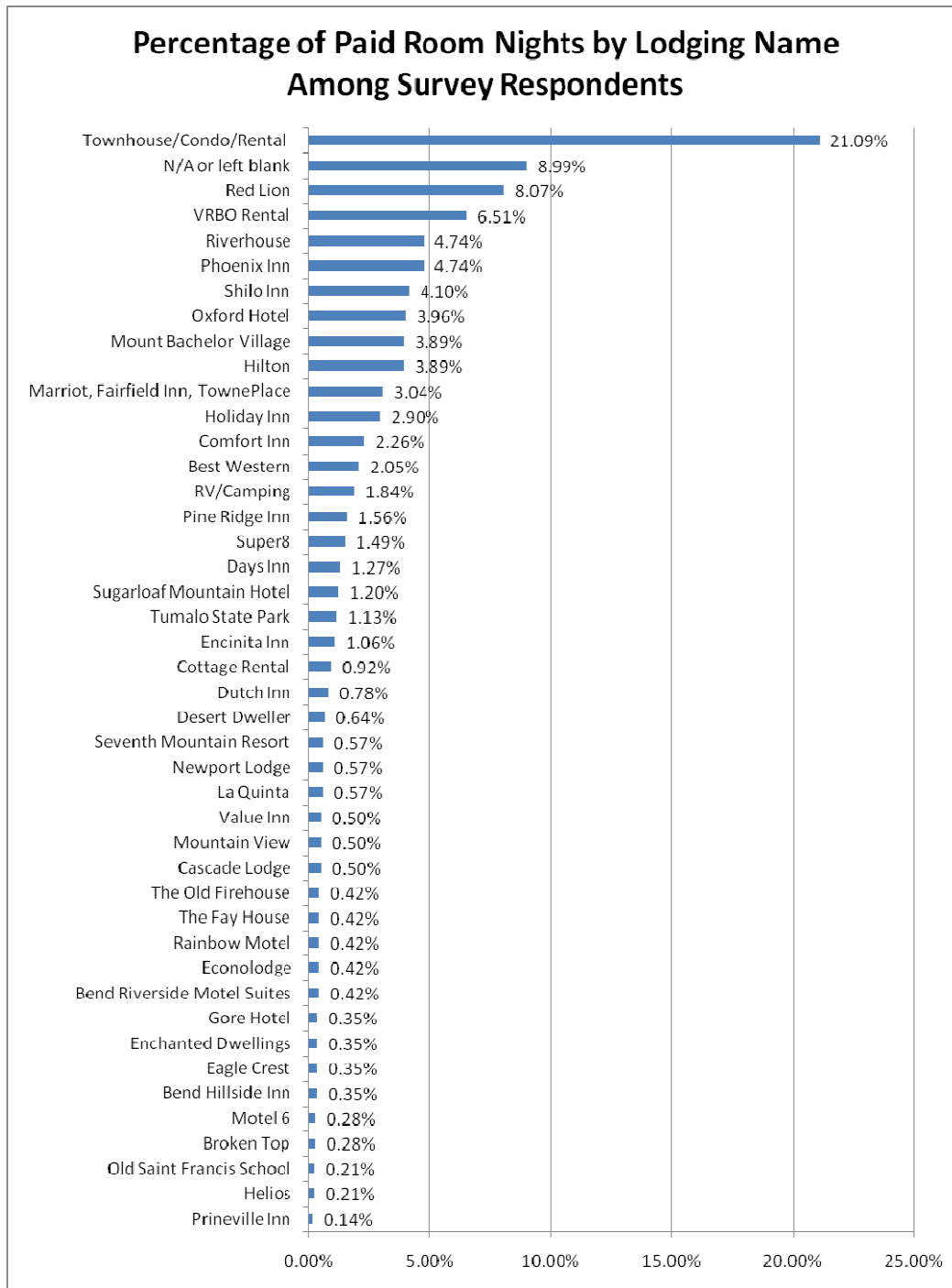
- I wish to return in the winter to see what it's like. Also I'm looking into relocating my job in your local hospital.
- I've investigated both real estate and business opportunities.
- Just a brief discussion with my husband. No real action taken.
- Just basic research.
- Just browsed online.
- Just considering, nothing serious at this point. Keeping our eyes open for a cabin/property (foreclosure property, etc.) that we could use over the next few years as a 3-4 times a year visitation property, then to look for a more permanent home/property to live/work out of potentially down the road.
- Just thoughts about moving or spending time in Bend
- Look at overall job market, priced homes in 2010
- Looked at houses (no agent involved). Window shopped really. Looked into schools, areas of interest for living.
- looked at housing brochures / real estate flyers.
- Looked at property and available jobs
- Looked at purchasing home but ended up buying property closer to home
- looked at real estate in Bend in consideration of a possible purchase. Investigated how I might bring a branch of my business to Bend.
- Looked at real estate possibilities.
- Looked at real estate, talked w/ agent
- looked at real estate.
- looked on various websites and started pricing real estate
- Looked through for sale listings.
- Looked with an agent 8 years ago. Still considering retiring in Bend
- looking online at properties
- Met with a real estate agent.
- My wife and I looked at roughly 30 houses while in Bend for the races. We found one in Mtn. High and are in escrow (it's set to close Oct. 1). We plan on retiring in Bend in about 4 or 5 years, and will visit periodically until then.
- no action yet
- No actions taken, waiting for retirement age.
- No actions. I just really like the area.
- No more than discussing whether or not Bend would be equal to, less than, or better than living where I live now, in terms of cost of living, cost of housing, and ease of transportation in and around the city. I looked casually at advertisements of real estate for sale.
- None
- None
- None
- None
- None
- None as yet
- none so far, it's just a consideration
- none yet
- none yet

- None yet, but maybe in retirement.
- None. Just a pleasant daydream.
- not pursued this.
- Nothing in particular but we have discussed in within our family.
- nothing yet
- nothing yet! Just looked at ads. That's it.
- Nothing yet, but would consider for retirement.
- Nothing yet. Need to sell my house first.
- Only thought about the possibility of living in Bend. No other action taken.
- purchased a home
- Purchased a home in Bend.
- purchased lot looking for condo
- Spent time looking at houses for sale in bend
- talked to an agent and looked at properties.
- Talking with friends (residents) of Bend
- We bought a second home in Bend after visiting the city for the 2011 Masters Nationals
- We have looked at real estate to possibly buy.
- We have ownership in a timeshare at Sunriver
- We permanently relocated to Bend and are considering buying a house in the next year.
- Yes

Appendix B: Distribution of Room Nights by Property

In the web survey, participants staying in commercial lodging (hotel, condo, campground, etc.) were asked to share the lodging property name. The distribution of responses is illustrated in Figure 1 below. It should be noted that this does not reflect all paid room nights, but only those indicated by respondents to the web survey.

Figure 1 – Distribution of Paid Room Nights



Appendix C: Event Registration Paper Survey



NOTE: Travel party refers to all persons for whom lodging is paid for as a group, or if you did not stay overnight in Central Oregon, your travel party is all persons who drove to Bend together.

Q1. How many people are in your travel party, including yourself? _____ people

Q2. Of this total number of people, how many are Road Racing National Championship racers / contestants? If none, please write "0".

_____ people are racers / contestants

Q3. Have you previously visited Central Oregon? Central Oregon includes Bend, Redmond, Sisters, and resorts like Sunriver.

- Yes → how many times have you visited before this trip? _____ time(s)
 No

Q4. Did you stay overnight in Bend?

- Yes, and I was responsible for paying for lodging
 Yes, and someone else was responsible for paying for lodging
 No, did not stay overnight (GO TO Question 9)

Q5. How long are you staying in Central Oregon during this visit? _____ days (include parts of days)

Q6. In what Central Oregon community is your lodging during this visit?

- Bend Sunriver None / day trip only → skip to Question 8
 Redmond Other

Q7. What type of lodging are you using? Please write the name of the hotel, rental management company, or campground.

- Hotel / motel → **which one** _____
 Host housing
 Rented condo / townhouse / house → **which one/company** _____
 At home (including 2nd home / timeshare)
 RV / camper van / tent camping → **which campground** _____
 With friends or relatives in their home
 Other → **please describe** _____

Q8. How many rooms is your travel party using at this lodging – and for how many nights?

If you rented a house or a condo the entire house or condo should be counted as one room.

_____ rooms **and** for _____ nights

Q9. How much do you estimate that you and your travel party will spend in total in Central Oregon during your visit? Please report spending in each category.

Lodging, including hotels, motels, rental, RV / campgrounds, etc.	\$_____
Restaurants and pubs	\$_____
Food and drink purchased at grocery or convenience stores	\$_____
Other shopping, including supplies and souvenirs	\$_____
Amusements / attractions / tours	\$_____
Gas and oil (paid in <u>Central Oregon</u>)	\$_____
Everything else, including any car rental (paid in <u>Central Oregon</u>)	\$_____

Q10. Do you expect members of your travel party to make any additional expenditures not included in your answers to Question 9 above?

- Yes → please estimate how much the party will spend in addition to amounts shown above
\$_____
- No – all expected expenditures for people in my travel party are shown in Question 8

Q11. What information sources did you use to plan this trip to Central Oregon? (Check all that apply.)

- None
- Visit Bend website (visitbend.com)
- USA Cycling website
- Other website → which ones _____
- Prior visit experience
- Brochure → which ones _____
- Word of mouth
- Other → please describe _____

Q12. Did you fly during any part of your travel to Central Oregon?

- No
- Yes → was your final airport 1) Redmond/Bend, 2) Portland, 3) Seattle, or 4) other? (Please circle one.)

and → what was the total cost of airplane tickets for all persons in your travel party? \$_____

Q13. Did you rent a car during any part of your travel to Central Oregon?

- No
- Yes → was the rental pickup at 1) Redmond/Bend, 2) Portland, 3) Seattle, or 4) other? (Please circle one.)

and → what was the total cost of rental car(s) for all persons in your travel party? \$_____

Q14. What is the zip code of your primary residence? _____

If you live outside the US, please write the name of your country: _____

Q15. What is your gender? Female Male

Q16. What is your age?

- | | | | |
|---|-----------------------------------|-----------------------------------|--------------------------------------|
| <input type="checkbox"/> Under 18 years old | <input type="checkbox"/> 25 to 34 | <input type="checkbox"/> 45 to 54 | <input type="checkbox"/> 65 to 74 |
| <input type="checkbox"/> 18 to 24 | <input type="checkbox"/> 35 to 44 | <input type="checkbox"/> 55 to 64 | <input type="checkbox"/> 75 or older |

Q17. What is your household's total annual income before taxes? Include income for all persons that regularly live in your household and all sources of income – salary, pensions, interest/dividends, etc.

- | | | |
|---|---|---|
| <input type="checkbox"/> Less than \$25,000 | <input type="checkbox"/> \$50,000 to \$74,999 | <input type="checkbox"/> \$100,000 to \$199,999 |
| <input type="checkbox"/> \$25,000 to \$49,999 | <input type="checkbox"/> \$75,000 to \$99,999 | <input type="checkbox"/> \$200,000 or more |

Appendix D: Post-Event Web Survey

USA Cycling Masters Road National Championships

Page One

Thank you for taking the time to respond to this survey from *Visit Bend*.
Your responses are extremely important.

At the conclusion of the survey you will have the opportunity to enter a drawing to win free deluxe lodging at next year's Masters National Championships

As a reminder, all responses are kept confidential. If you choose to enter the drawing, this information will only be used for the drawing, will be deleted after the drawing, and will not be connected to your survey responses.

New Page

Were you a participant in the 2012 USA Cycling Masters Road Championships?

- Yes
 No

Using the map below as a reference, how many nights did you spend in Central Oregon during your visit for the 2012 USA Cycling Masters Road National Championships?

Which of the following activities did you do during your trip to Central Oregon for the 2012 Masters Road Championships? (Check all that apply)

- Biking (other than in the races)
 Arts / Cultural
 Fishing
 Shopping
 Hiking / Trail Running
 Dining Out
 Guided Tour
 Music / Nightlife
 Family Event
 Brewery Visit / Bend Ale Trail
 Museums
 Rafting / Canoe / Kayak
 None of these
 Other
-

New Page

As you may know, the USA Cycling Masters Road National Championships moves around the country to different locations. How important was the fact that the races were held in Bend to your participation?

	Not at all: I would have participated wherever they were held					Half of the reason I participated was due to the races being held in Bend					My only reason for participating was because the races were in Bend
Importance of Bend as a Race Host Site to Your Participation	0	1	2	3	4	5	6	7	8	9	10

New Page

About Your Travel Party:

Including yourself, how many people were in your travel party during your trip to Bend for the 2012 Masters Road National Championships?*

Of these total people, how many were 2012 Masters Road National Championships Contestants?

*: _____

If your travel party stayed in commercial lodging during your visit to Central Oregon (hotel, condo, campground, etc.), what was its name?

: _____

How many units did your travel party use at this lodging?

: _____

How many nights did your travel party stay at this lodging?:

New Page**Spending in Central Oregon:**

How much do you estimate that you and your travel party (combined) spent in total in Central Oregon during your visit? Please report spending in each category.

Please include any advance payments. If no one in your travel party spent any money on any of the categories below, please type 0. If you do not know the exact amount, please provide your best estimate.

Lodging, including hotels, motels, rental, RV / campgrounds, etc.: _____

Restaurants and pubs: _____

Food and drink purchased at grocery or convenience stores: _____

Other shopping, including supplies and souvenirs: _____

Amusements / attractions / tours: _____

Gas and oil (paid in Central Oregon): _____

Everything else, including any car rental (paid in Central Oregon): _____

Did you or someone else in your travel party make most of the expenditure reported in the question above?*

I did

Someone else in my travel party did

New Page

Did you fly during any part of your travel to Central Oregon?

Yes

No

Was your final destination:

Seattle

Portland

Redmond/Bend

Other: _____ *

Did you rent a car during any part of your travel to Central Oregon?

Yes

No

Was the car rental pick up at:

Seattle

Portland

Redmond/Bend

Other: _____ *

New Page

How likely are you to ...*

	0 Not at all likely	1	2	3	4	5	6	7	8	9	10 Extremely Likely
...return to Bend for a future visit - other than for future championships?	()	()	()	()	()	()	()	()	()	()	()
...recommend Bend to a friend, family member, or colleague as a place to visit?	()	()	()	()	()	()	()	()	()	()	()

Is there anything we can do to make next year's Masters Road National Championships in Bend better?

New Page

Did you participate in the 2011 Masters Road National Championships in Bend?

- () Yes
- () No

Have you participated in another event in Bend in the past?

- () Yes
- () No

Previous Event

What previous event brought you to Bend?:

What year was the event?

- () 2012
- () 2011
- () 2010
- () 2009
- () 2008
- () 2007
- () 2006
- () Prior to 2006

New Page

Since your previous visit (listed on the last page):

Have you returned to Bend to visit - other than for the 2012 Masters Road National Championships?

Yes

No

Have you recommended Bend to a friend, family member, or colleague as a place to visit?

Yes

No

Have you considered moving to Bend or purchasing real estate in Bend?

Yes

No

Please describe any actions you have taken in this regard (purchased a home in Bend, worked with an agent in Bend, looked for a job in Bend, etc.).

New Page

Please provide us with some information about you:

Zip Code of your primary residence: * _____

Country (if not in the U.S.): _____

Age: _____

Gender:

Female

Male

Annual household income (before taxes):

Less than \$25,000

\$25,000 - \$49,999

\$50,000 - \$74,999

\$75,000 - \$99,999

\$100,000 - \$199,999

\$200,000 or more

Thank you for your responses. They will help Bend improve as a destination.

To submit your survey and enter your contact information for the prize drawing, please hit the "Submit" button below.

Your contact information will only be used for the drawing, will remain separate from your responses, and will be deleted after the drawing. Thank you!
