

STURGIS MOTORCYCLE RALLY



2013 SURVEY SUMMARY REPORT

Survey Conducted by:

Community Builders, Inc. 
Community and Economic Development Consulting
"Building Communities - One Relationship at a Time" **CBI**

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NOVEMBER 18, 2013

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ACKNOWLEDGEMENTS

Robert Sharp & Associates, the City of Sturgis, and Community Builders, Inc. (CBI) would like to acknowledge the hard work of the 2013 survey teams, without whom this survey could not have been successful. Those survey teams included:

Team #1

Randy Bender
Sherry Roth

Team #2

Cheryl Brewer
Beckie Geffre
Susan Overstreet

Team #3

Steve Anders
Susan Anders

Team #4

Megan Cutler
Brenda Fernen



Three of the survey sites were made possible by the kindness and participation of three Sturgis establishments:

- Loud American Roadhouse
- Knuckle Saloon
- Easy Riders Saloon

The owners and managers of these establishments supported the 2013 survey by allowing the survey teams to circulate on their premises, which is gratefully acknowledged.

Additionally, CBI would like to thank Robert Sharp and Tony Dodd (Robert Sharp & Associates) for their trust, insight and support; and Lisa Katzenstein, Daniel Ainslie, and Brenda Vasknetz (City of Sturgis) for their direct assistance and guidance, during the 2013 Sturgis Motorcycle Rally survey.

METHODOLOGY

Robert Sharp & Associates (RSA) provides a variety of advertising, marketing, and social media services to the City of Sturgis (City). The City desires to continually improve its understanding of its many visitors during the Sturgis Motorcycle Rally (Rally). In the past, the City conducted surveys using a kiosk in one or more locations during previous Rallies. For 2013, RSA contracted the services of Community Builders, Inc. (CBI) to conduct a random survey of patrons during the 2013 Sturgis Motorcycle Rally.

A primary goal of this survey was to collect at least 1,600 total surveys during the week. CBI developed a survey instrument, based on industry best practices, which captured certain demographics of each survey patron.

CBI developed an approach that emphasized the use of survey teams that roamed high traffic areas of Sturgis during the 73rd Annual Sturgis Motorcycle Rally. CBI instructed the teams to



solicit responses from randomly selected patrons (i.e., every nth pedestrian), while reaching across demographic lines. The City hired a mix of survey takers, each of whom has a friendly, approachable personality, including a range of ages, from an applicant pool of local residents who were familiar with Sturgis and the Rally. Survey takers were organized into four teams of two persons and issued fluorescent green "Official Survey Taker" shirts. CBI conducted a half-day training session for the survey teams and supplemented the teams' efforts by using a fifth handheld device to take surveys when time allowed, roaming the Community Center and other public spaces during the Rally.

CBI chose to use mobile technology for this survey. Because of the huge crowds that typically attend Rallies – and the high bandwidth use by large numbers of people – CBI determined that a service that did not depend upon Internet or telephone connectivity should be used. CBI engaged the services of Opinionmeter, an established survey company that licenses mobile survey applications that do not require any kind of live connection to conduct surveys, using handheld devices that can effectively store survey responses on the device for subsequent downloading and analysis. CBI developed the survey instrument and installed the application on each handheld device (Samsung Galaxy tablets).

The official dates for the Rally were August 5 – August 11, 2013. However, because many Rally patrons actually begin arriving the weekend before the Rally, CBI trained the survey teams on August 2, with live surveys beginning later that afternoon and continuing through Friday, August 9. The training was approximately two hours in duration, covering the basics of the handheld device operation, survey techniques, and sample introductions to potential

respondents, and a review of the survey itself. Immediately after the training, the survey teams began administering surveys.

The City provided each team of survey takers with a Samsung Galaxy tablet to use for conducting the surveys. The teams could hand the tablet to a survey respondent to complete the survey or, alternatively, if a survey respondent desired, the survey team would read the questions and answers to them, recording responses for each question.



The City assigned each survey team to one of four locations to take surveys in the downtown Sturgis area - the Loud American, Easy Rider Saloon, Knuckle Saloon, and 2nd Street Plaza. The teams rotated the locations each day, afternoon and evening. The teams conducted surveys from approximately noon until 8:00 p.m., from Friday, August 2 through Friday, August 9 taking a dinner break at 5:00 p.m. Teams were asked to try to obtain approximately 5-8 surveys per hour with a target of an average of 200-250 surveys per day. CBI provided daily tallies to the City so

that teams could adjust their efforts and so that CBI could supplement the teams' efforts as needed.

CBI's survey approach was to conduct initial surveys during the Rally, focusing on demographics and basic information about Rally patrons' plans. To incentivize participation, survey takers provided a gift to survey respondents upon the conclusion of them taking a survey (e.g., pins, key chains, and sponsor-provided tokens). Survey respondents were also given a coupon (which could be exchanged for a free bottle of water at the community center), and were told that their email address would be entered into a drawing to win one of the five Samsung Galaxy tablets that were used to conduct the surveys.

During the Rally, the survey teams completed 1,962 surveys (362 above the target). Daily totals are presented in the following table.

Sturgis Motorcycle Rally - 2013 Survey Totals										
DAY	FRI	SAT	SUN	MON	TUE	WED	THU	FRI	SAT	RALLY
DATE	8/2	8/3	8/4	8/5	8/6	8/7	8/8	8/9	8/10	TOTAL
SURVEYS	161	320	294	289	263	234	224	177	0	1,962

The total number of responses included in the graphs and tables below may differ from the total number of surveys completed. Some respondents chose to not answer some questions, and some questions allowed for multiple answers (i.e., "select all that apply").

This report is a summary of the key findings from the survey.



SURVEY QUESTIONS & RESULTS

The 2013 Sturgis Motorcycle Rally survey provides insight and helpful information for decision-makers to plan for future Rallies. It provides detailed information so that profiles of Rally patrons can be developed and applied to Rally marketing and sponsorship efforts. In short, the survey is a good snapshot of the many people who attended the 2013 Rally.

CBI has followed established survey protocols to ensure that the tablet survey results are valid, with a low margin of error and a high level of confidence. A large number of surveys were conducted specifically to help reach sound conclusions within key components of the demographics.

The Sturgis Motorcycle Rally attracts between 400,000 and 600,000 patrons each year. For a survey population of that size, a survey sample of 383 to 384 would provide a margin of error of $\pm 5\%$, and provide a confidence interval of 95% in the results. The margin of error measures how closely the survey results reflect the entire Sturgis Rally population. For example, if 70% of those surveyed say that the Sturgis Motorcycle Rally is their favorite event to attend, a 5% margin of error would add and subtract 5% on either side of that result, meaning that 65% - 75% of all Rally patrons would say that the Rally is their favorite event. Five percent (5%) is a commonly used margin of error for public surveys.

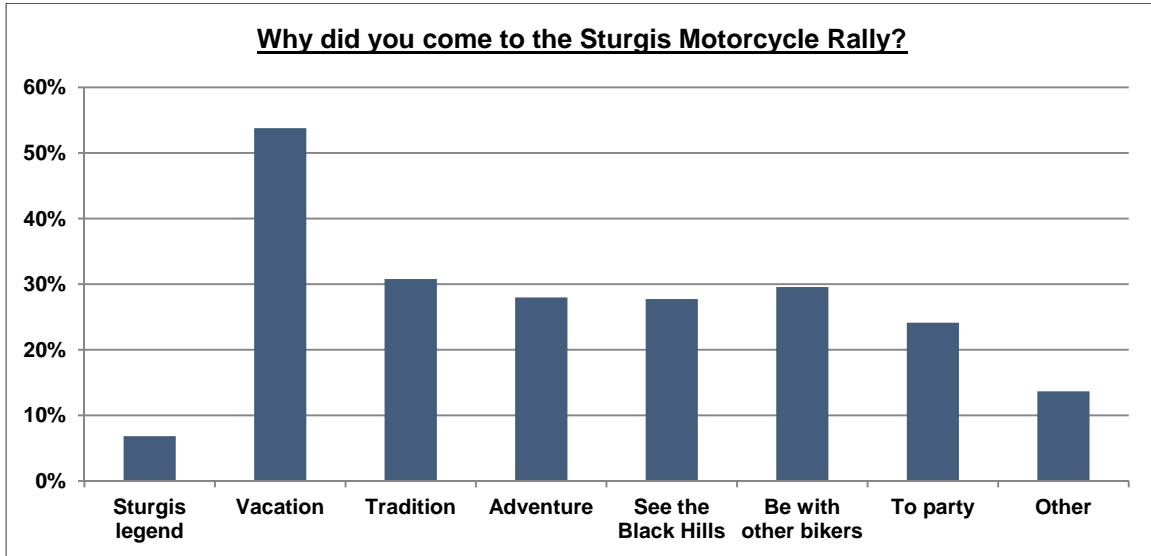
A confidence interval is the likelihood that the survey sample CBI picked mattered in the results generated. For example, if a team randomly picked 50 more Rally patrons to take the survey, how often would the results generated from the other respondents significantly differ from those 50 additional samples? A 95% confidence interval means that the same results would be obtained 95% of the time. Ninety-five percent (95%) is the most commonly used confidence level, but for many questions in this survey, CBI is able to provide a 99% confidence interval, due to the large survey sample size.

The graphs and tables below summarize the survey findings. For simplicity in the presentation, some questions and answers have been shortened or abbreviated.



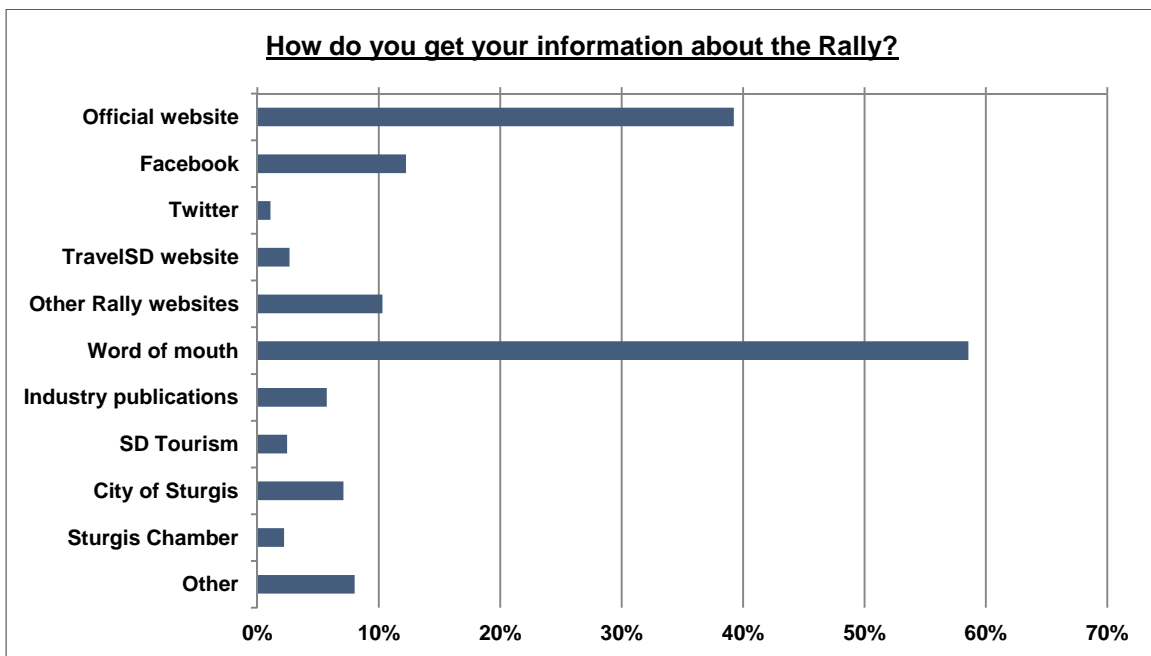
WHY THEY CAME

By far, the most common reason that patrons came to the Rally was to vacation. Respondents also tended to say they were seeking adventure and wanted to party at the Rally. A very common “Other” response was that respondents were at the Rally to work.



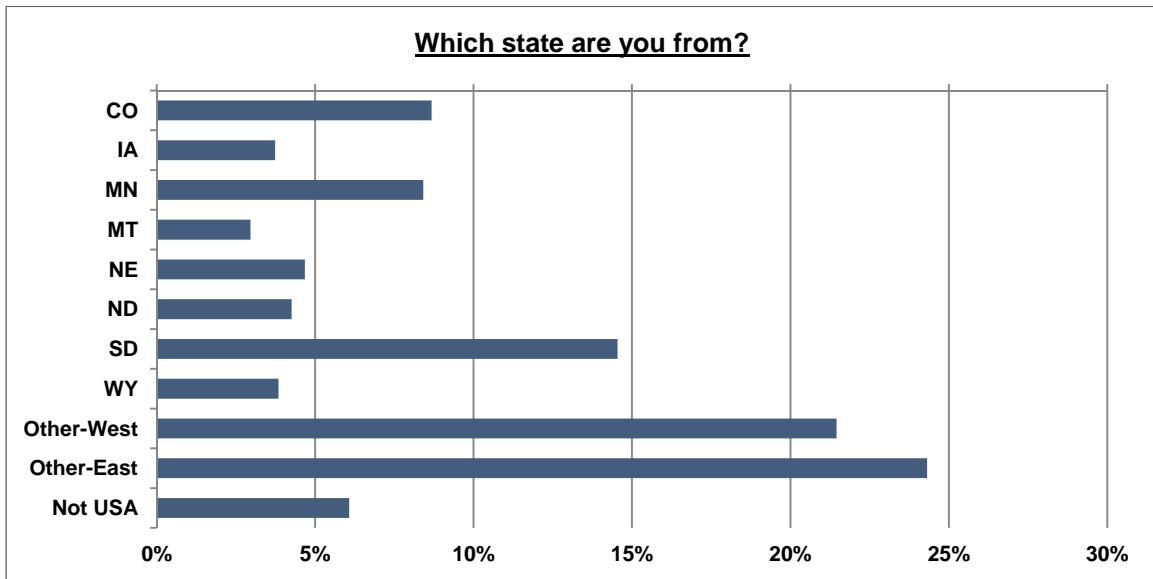
HOW THEY GET INFORMATION

The official website (SturgisMotorcycleRally.com) appears to be very effective in reaching Rally patrons. The other primary source of information, word of mouth, reflects the strong tradition of Rally attendance and its popularity among motorcycle enthusiasts. The comments included in the “Other” response support this conclusion.



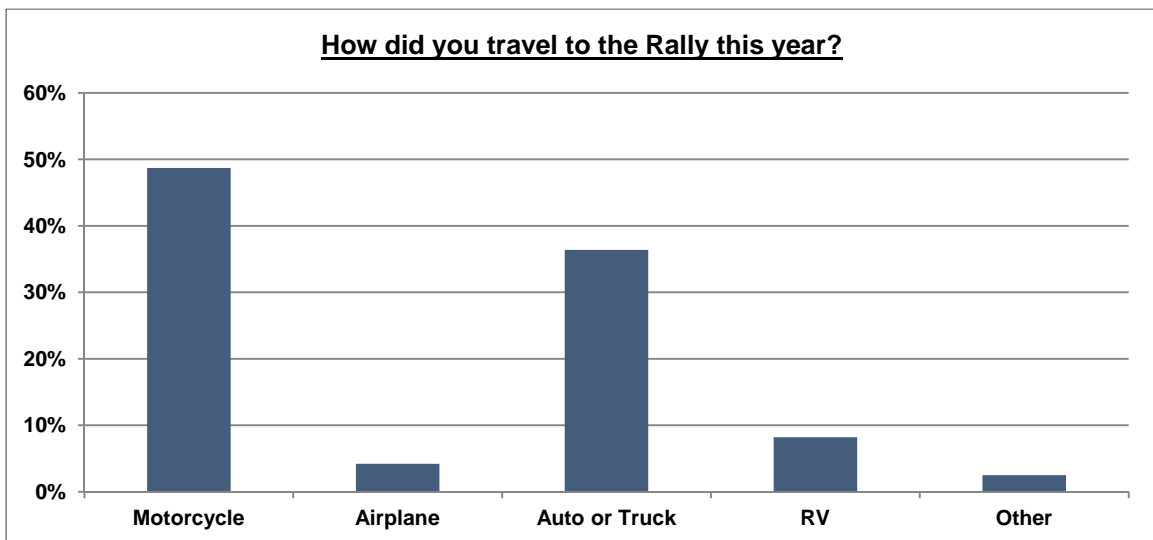
WHERE THEY ARE FROM

South Dakota, the site of the Rally, is the most represented State. Yet, the Rally is clearly a national event. Nearly every State is represented in the survey responses (the sole exception is Vermont). Additionally, less than half of all patrons come from the South Dakota region (defined as South Dakota and all its bordering states, including Iowa, Minnesota, Montana, Nebraska, North Dakota, and Wyoming). Beyond the South Dakota region, Colorado is the most represented State. By comparison, more than 20% of survey respondents came from other western States (i.e., States located west of the Mississippi River); about 20% more came from east of the Mississippi River. About 6% of Rally patrons are not from the United States.



HOW THEY TRAVEL

Patrons tend to travel to the Rally on a motorcycle, though a significant percentage travel in an automobile or truck.



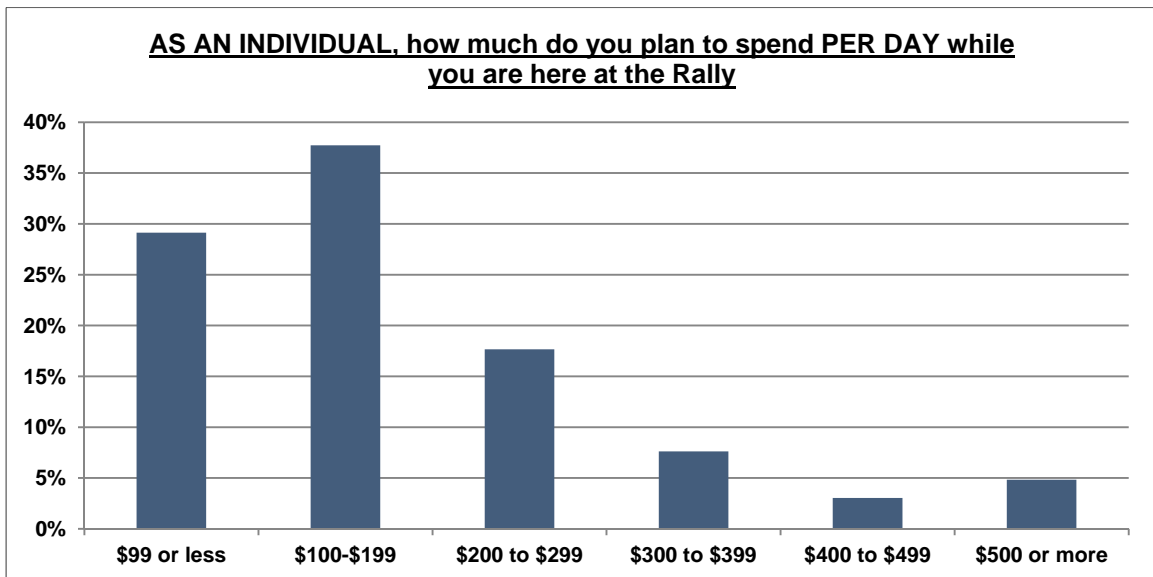
LENGTH OF STAY

About half of attendees planned to stay six or more days at the Rally, while just 5% planned to stay for just one day. The most common response was that attendees planned to stay 8 or more days at the Rally.



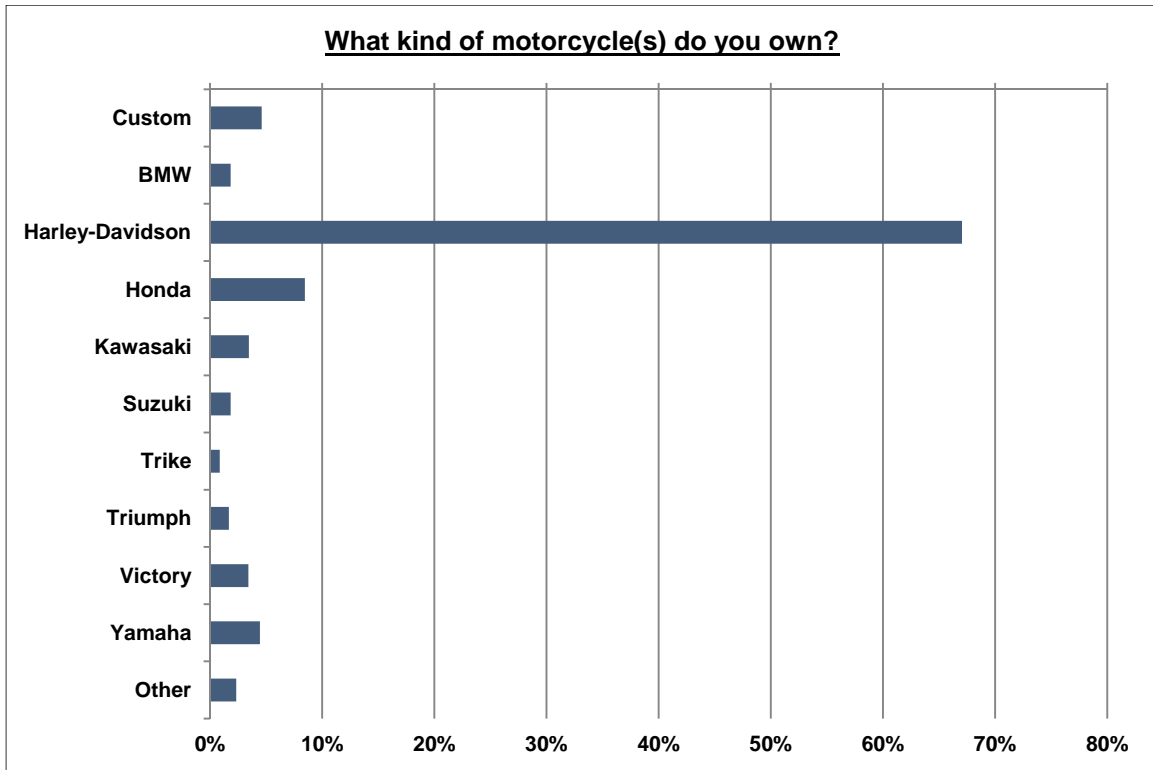
SPENDING

Individual spending appears to center on \$100 - \$199 per day, with another 29% spending less than \$100 per day. Less than 15% of Rally attendees plan to spend more than \$300 per day.



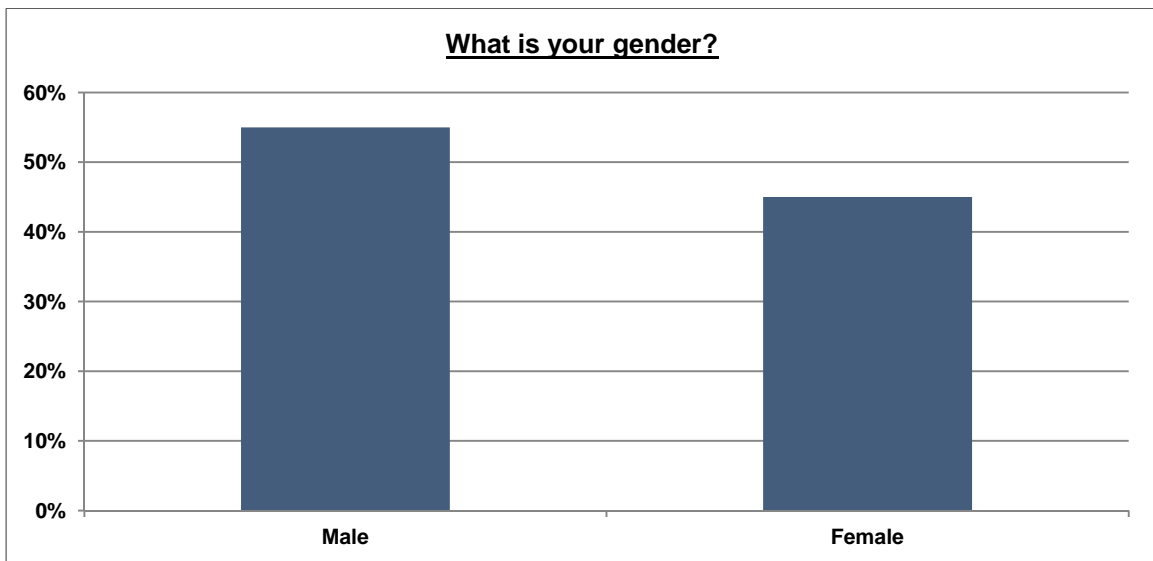
MOTORCYCLE OWNERSHIP

About two-thirds of those survey respondents who own a motorcycle own a Harley-Davidson. The next most frequently owned motorcycle (less than 10%) is a Honda.



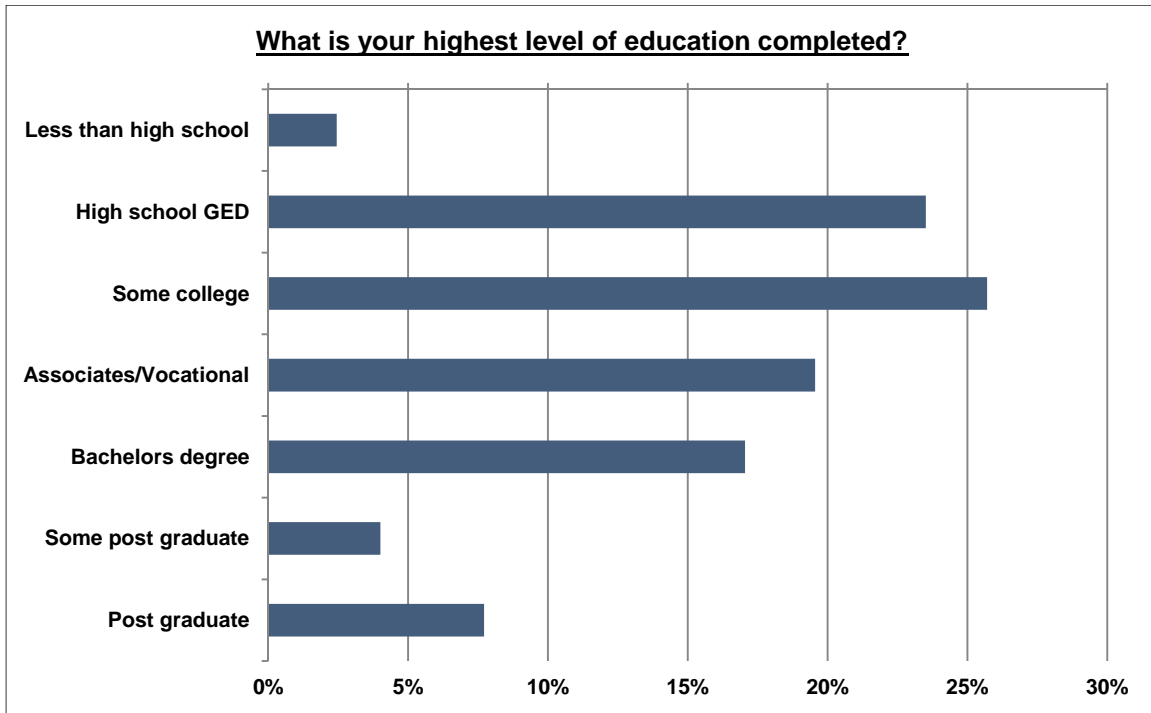
GENDER

More than half of all Rally attendees are male. Yet, anecdotally, many survey respondents commented that there are now more women riding motorcycles than ever before.



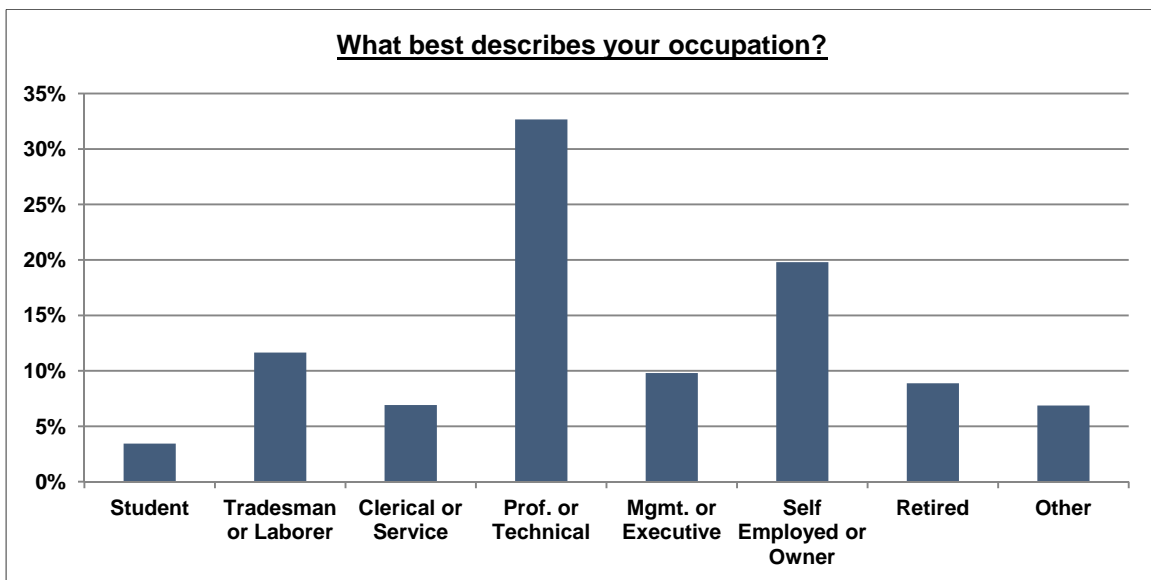
EDUCATION

More than 74% of all Rally attendees have at least some college education, and nearly half of them hold at least an associates or vocational college degree.



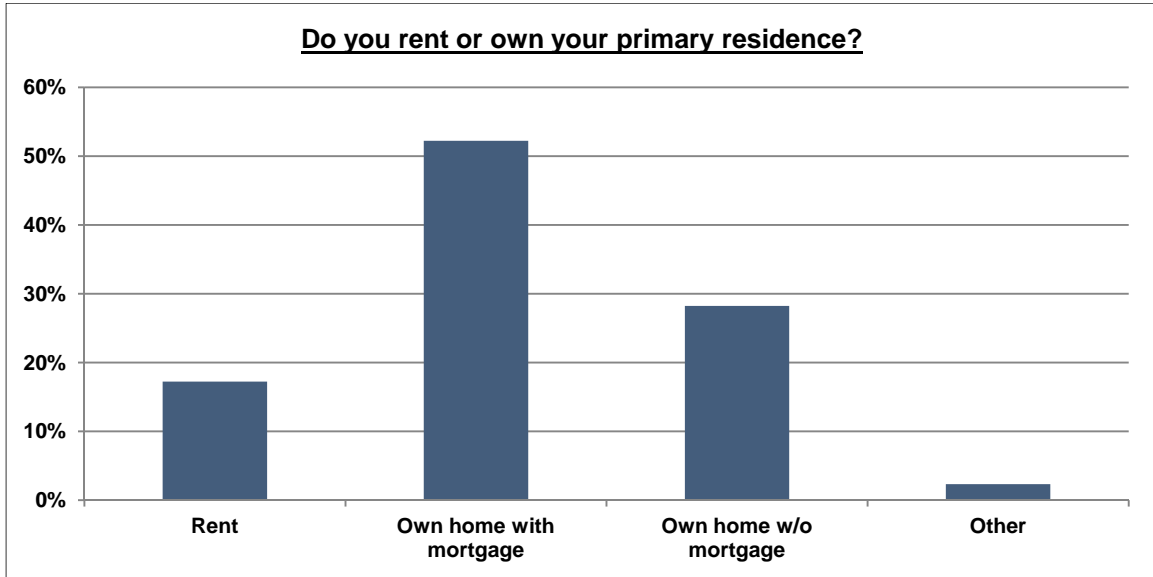
OCCUPATION

Nearly one third of Rally attendees are employed in technical or professional occupations. Another third are in management or executive positions, or own their own business.



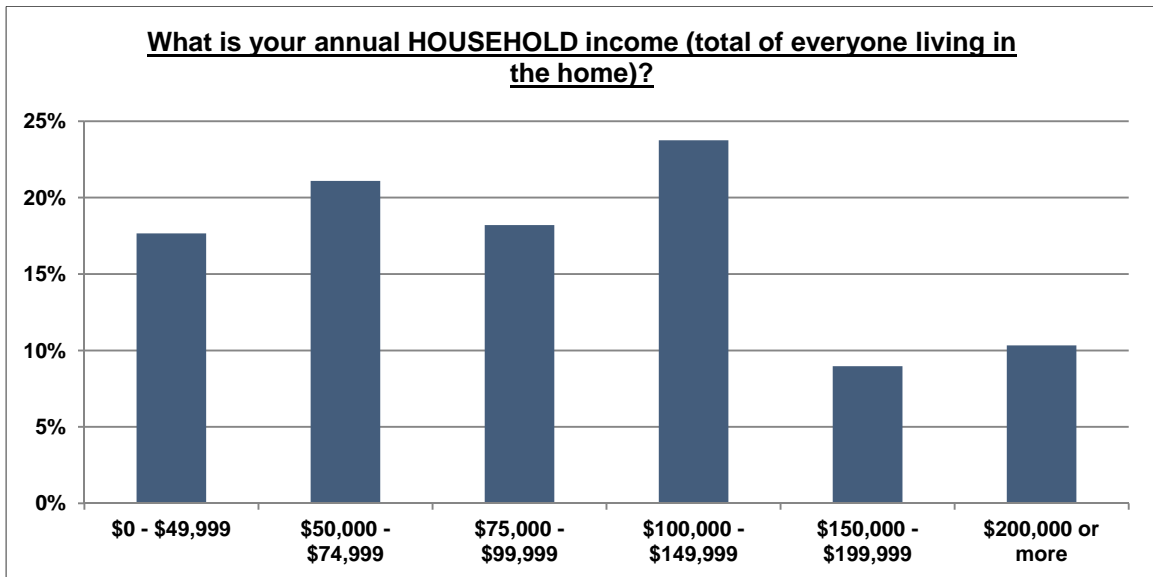
HOME OWNERSHIP

More than 80% of all survey respondents own their own home, and nearly 30% of them have no mortgage payment, which reflects a very solid financial profile for Rally attendees. Fewer than 20% are renters – and most of those survey respondents are at the Rally to work.



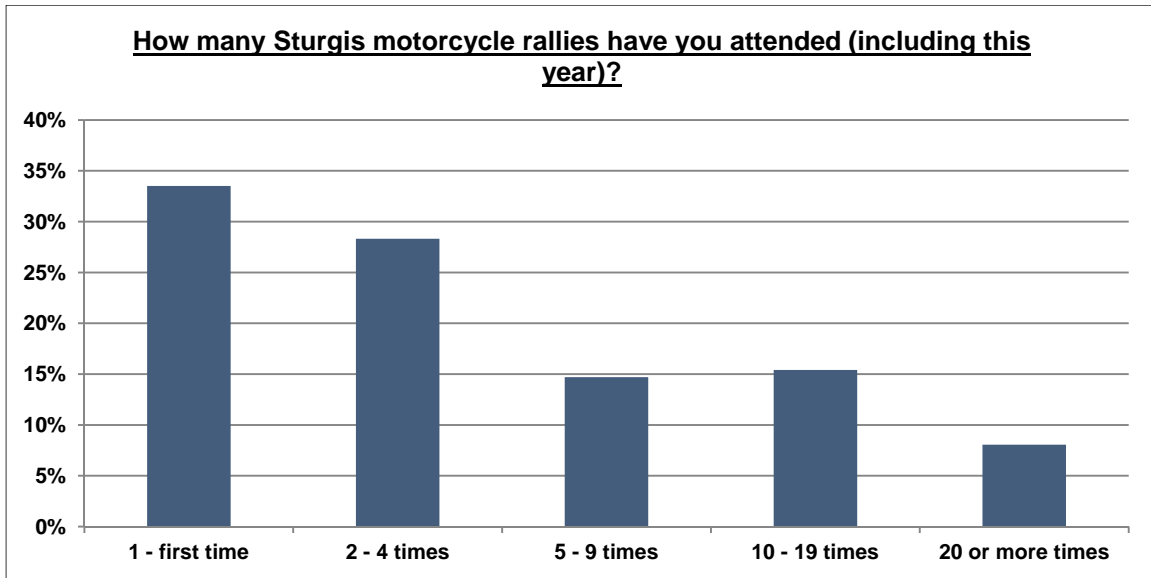
HOUSEHOLD INCOME

According to the survey, nearly two-thirds of attendees' household incomes are above \$75,000.



RALLIES ATTENDED

More than a third of the random tablet survey respondents indicated that it was their first time to a Sturgis Rally.



FAVORITE EVENT?

A very strong majority (70%) of all survey respondents identified the Sturgis Motorcycle Rally as their favorite event of the year to attend.

