



Oregon
2009 Visitor Report
June, 2010

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Introduction



- ◉ Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- ◉ In 2007, our proprietary Longwoods **Travel USA®** program was migrated from mail to online, using the MarketTools Inc. **ZoomPanel™**, with the benefits of rapid turnaround, enhanced flexibility and interactivity, as well as greater respondent involvement.
- ◉ It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- ◉ This report provides an overview for Oregon's domestic tourism business in 2009.

Methodology



- Each quarter, a random cross-section of 500,000 panel members is sent an e-mail invitation to participate in the survey, for a total annual outgo of two million. A reminder is e-mailed several days later to non-responders. In 2009, the completion rate for those accessing the **Travel USA®** questionnaire was 91%.
- For the 2009 travel year, this yielded :
 - 209,724 trips for analysis nationally:
 - 134,011 overnight trips
 - 75,713 day trips
- For Oregon, the following sample was achieved in 2009:
 - 3,602 trips:
 - 2,312 overnight trips, 847 of which were *marketable trips*
 - 1290 day trips, 755 of which were *marketable trips*
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

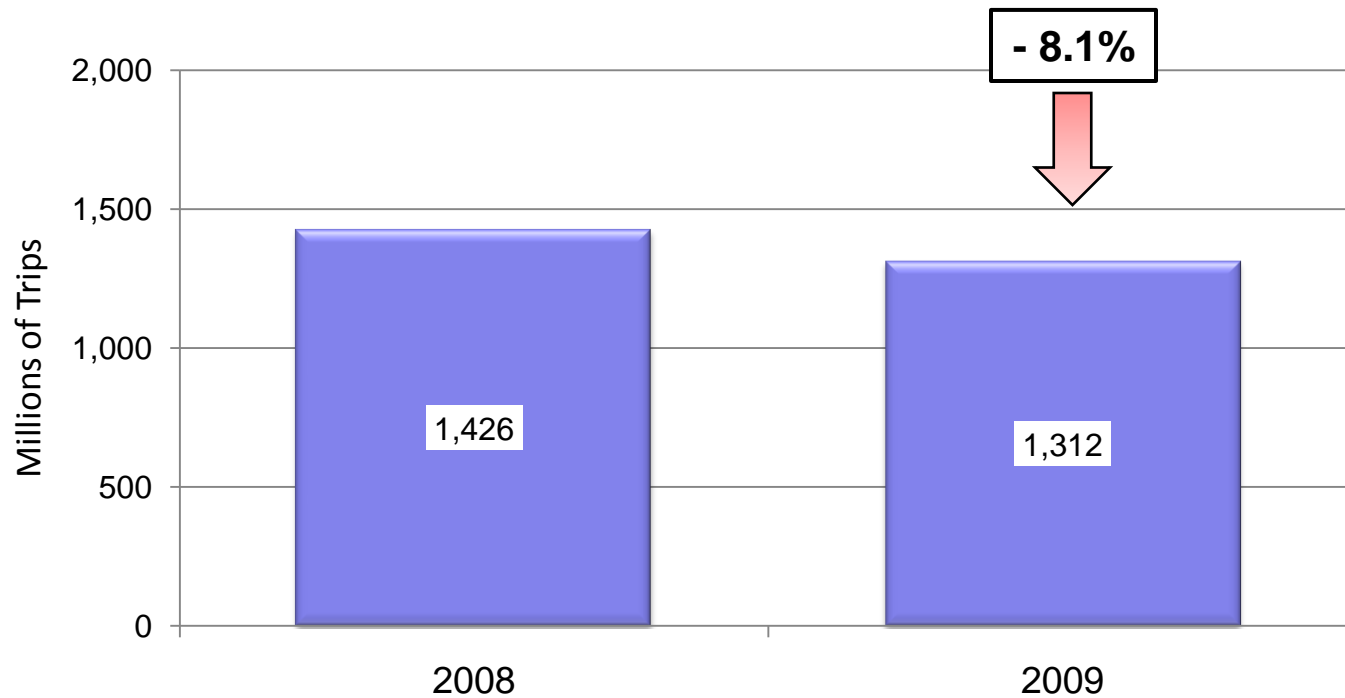


U.S. Travel Market Size & Structure

Size of the U.S. Overnight Travel Market — 2008 vs. 2009



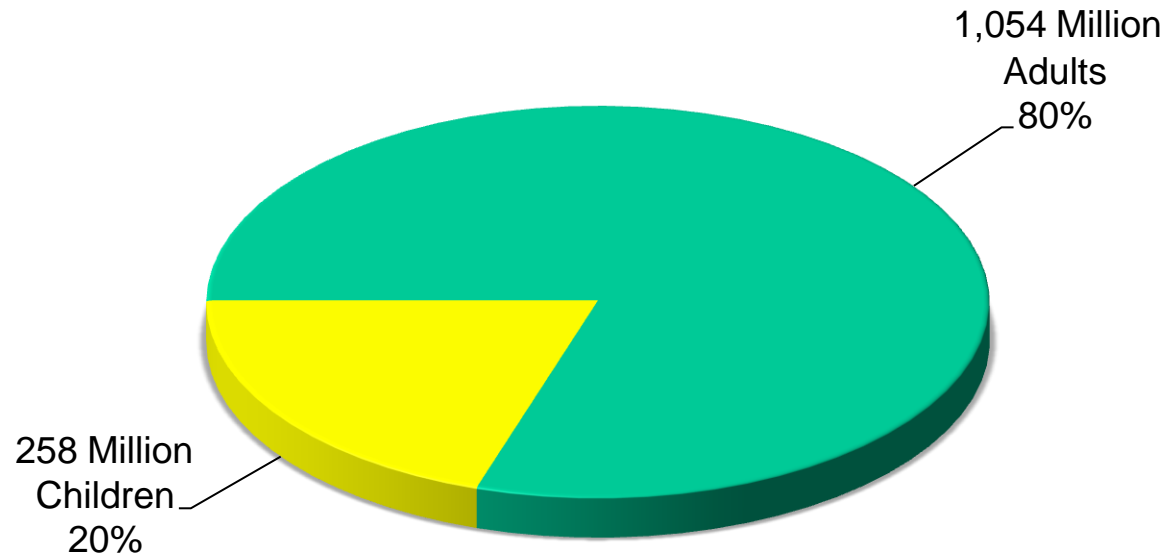
Base: Total Overnight Trips



Size of the U.S. Overnight Travel Market — Adults vs. Children



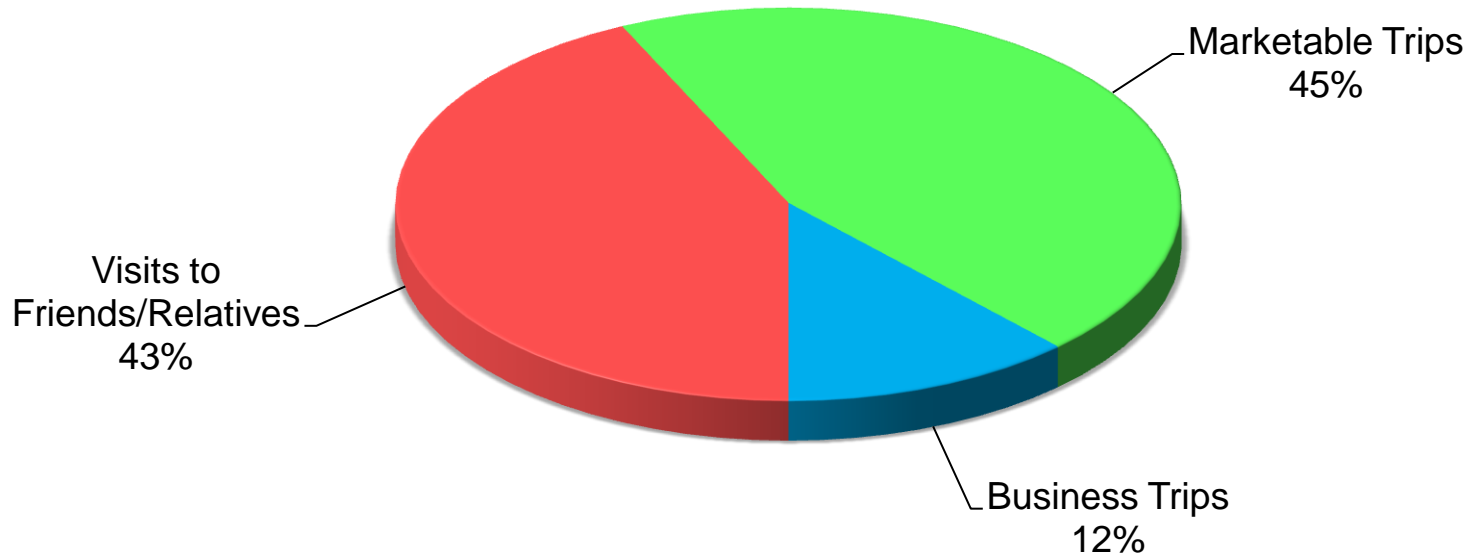
Total Person-Trips = 1,312 Million



Structure of the U.S. Travel Market — 2009 Overnight Trips



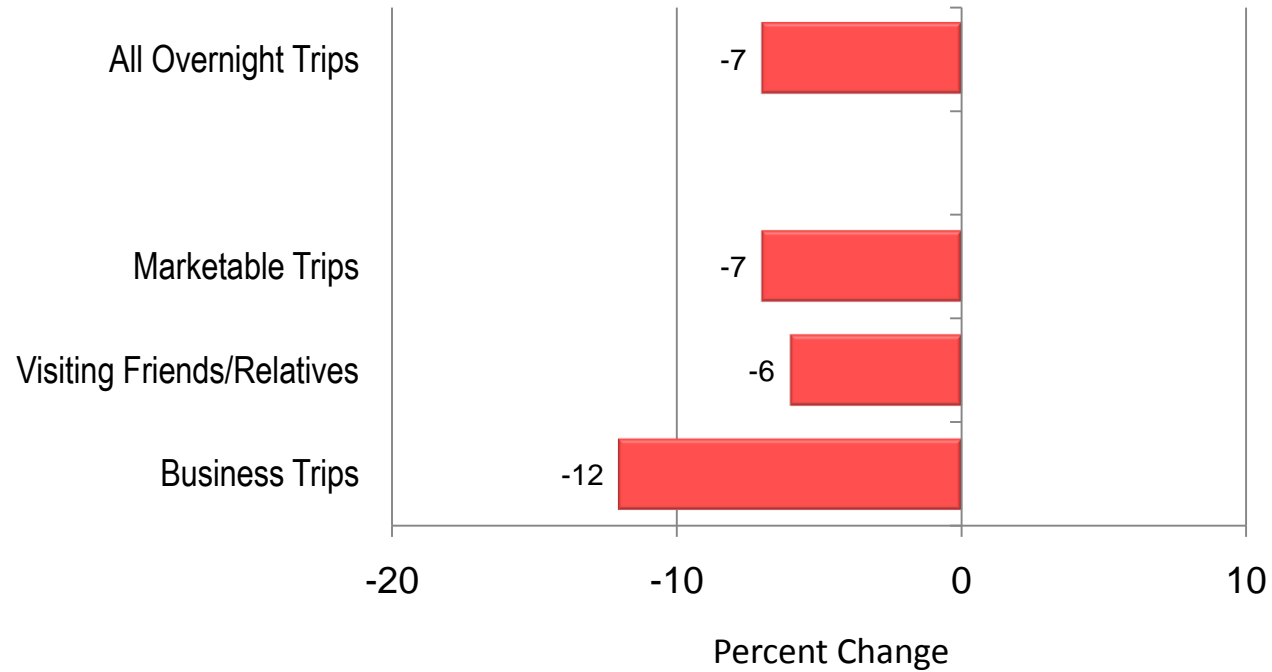
Base: Adult Overnight Trips



U.S. Market Trends for Overnight Trips — 2009 vs. 2008



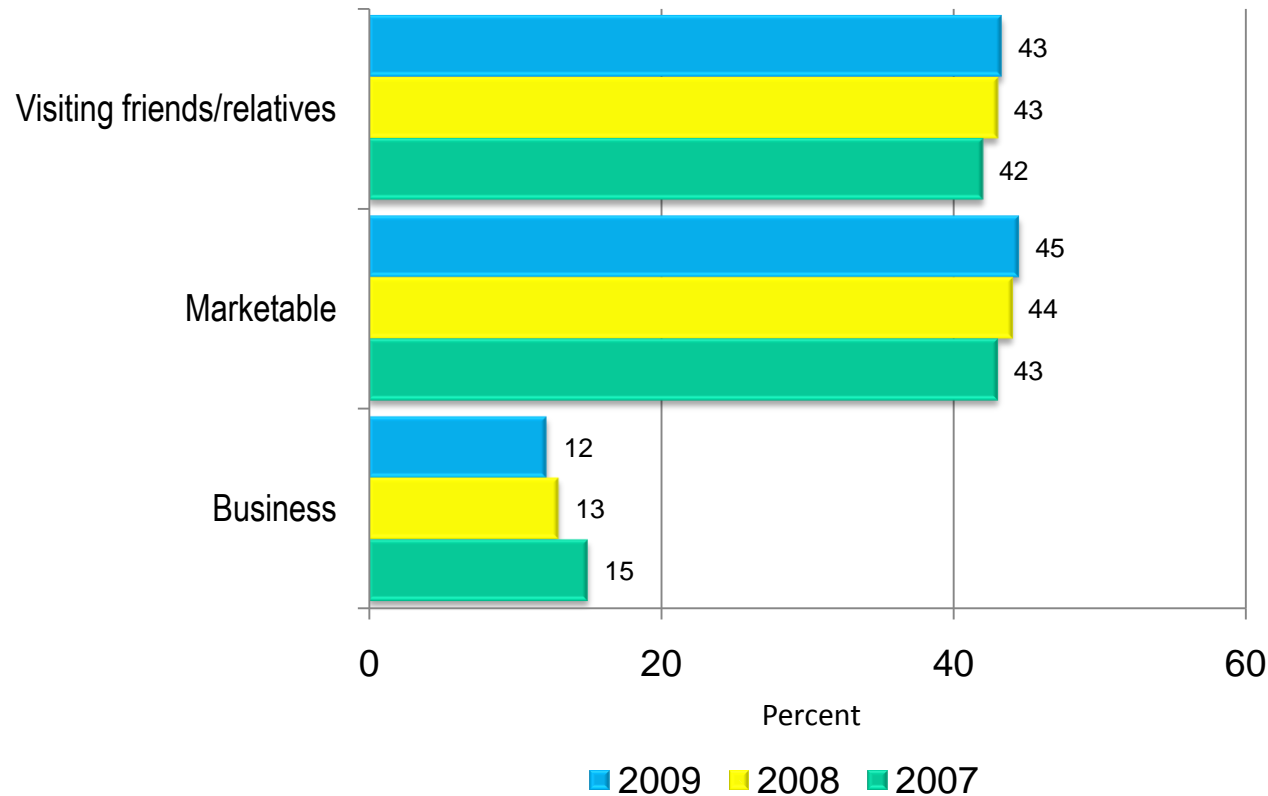
Base: Adult Overnight Trips



Structure of the U.S. Overnight Travel Market – Trends



Base: Adult Overnight Trips



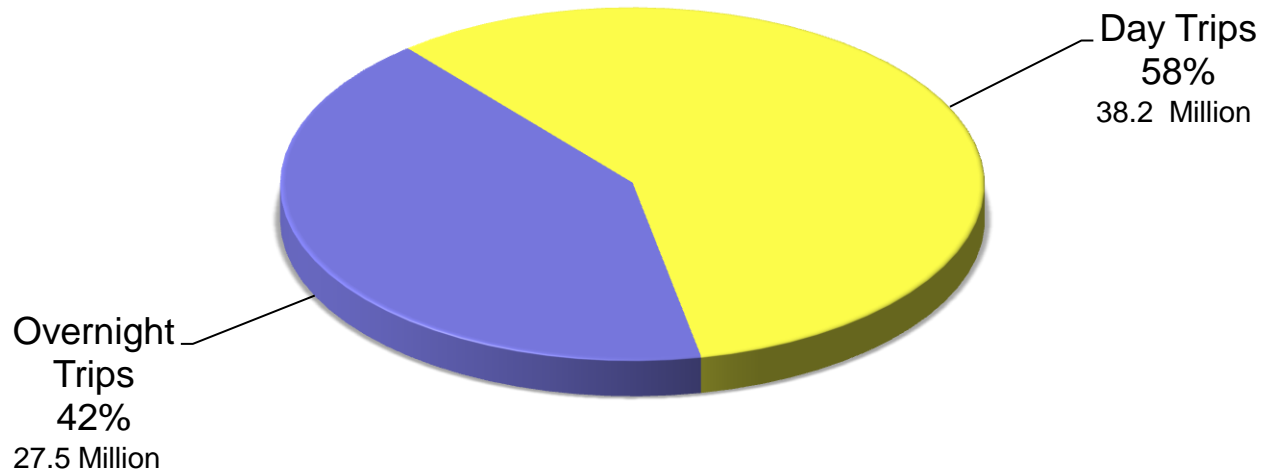


Oregon's Travel Market Size & Structure

Total Size of Oregon's Travel Market



Total Trips* = 65.7 Million

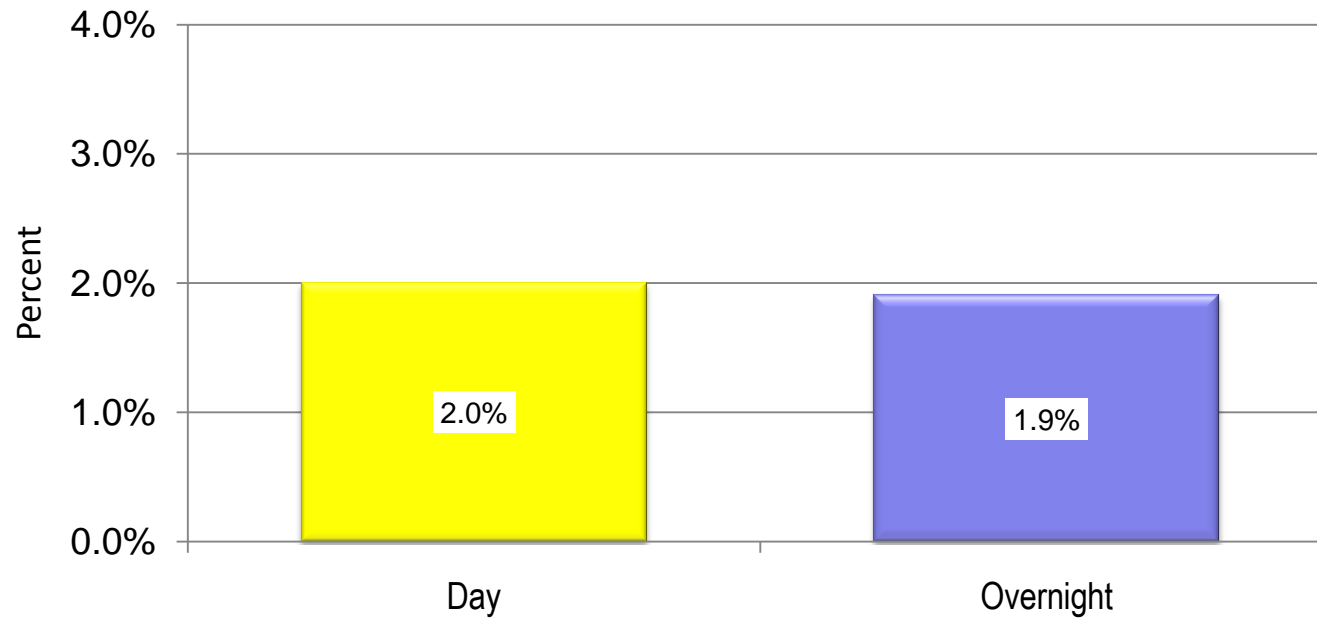


*Total volume includes both adults and children

Oregon's Share of Adult Domestic Trips



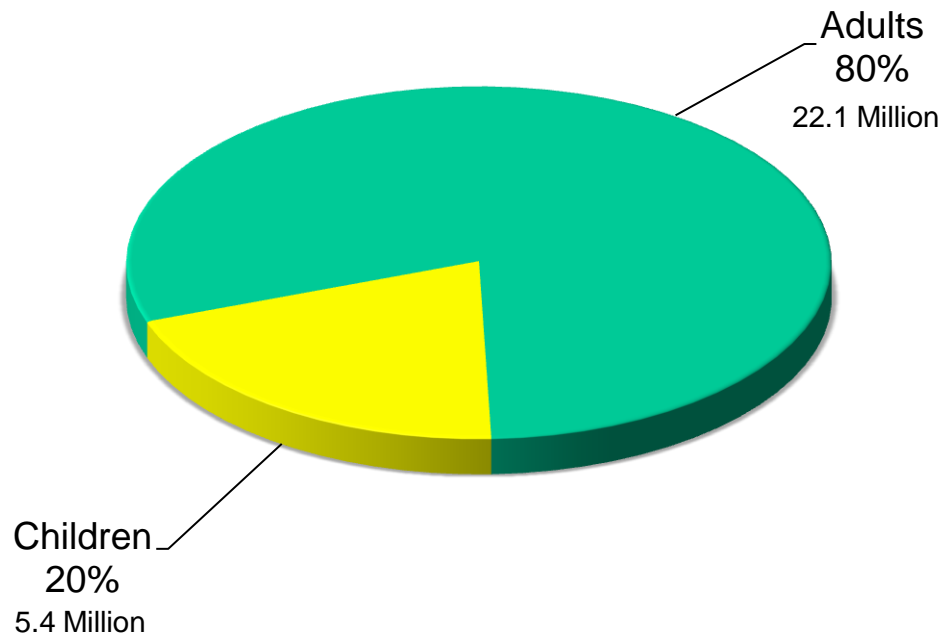
Base: Total Trips



Size of Oregon's Overnight Travel Market — Adults vs. Children



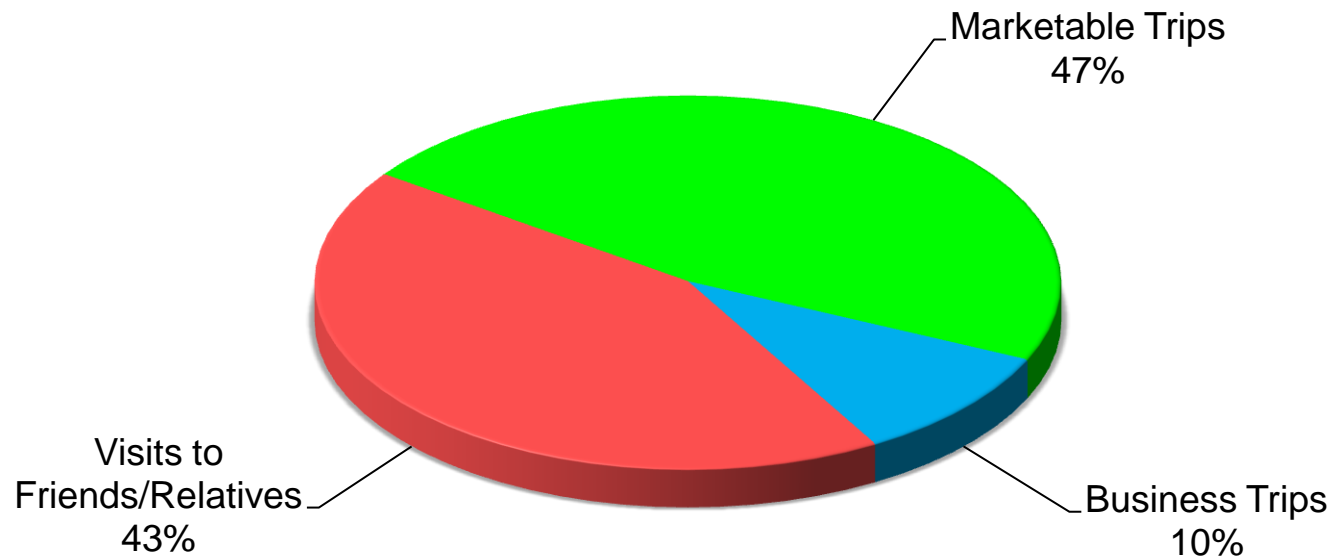
Total Trips = 27.5 Million



Oregon's Overnight Travel Market — by Trip Purpose



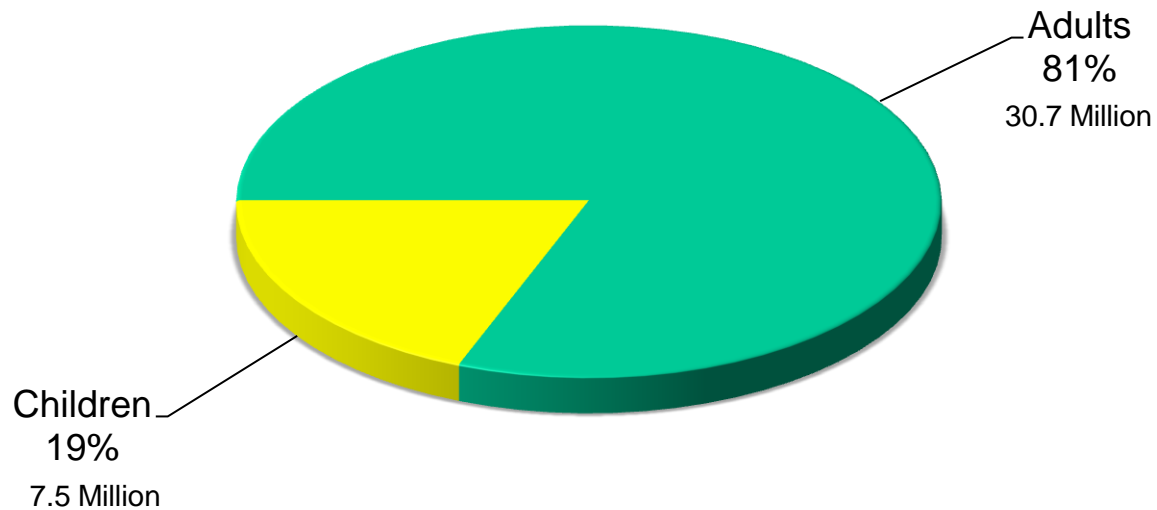
Base: Total Overnight Trips



Size of Oregon's Day Travel Market — Adults vs. Children



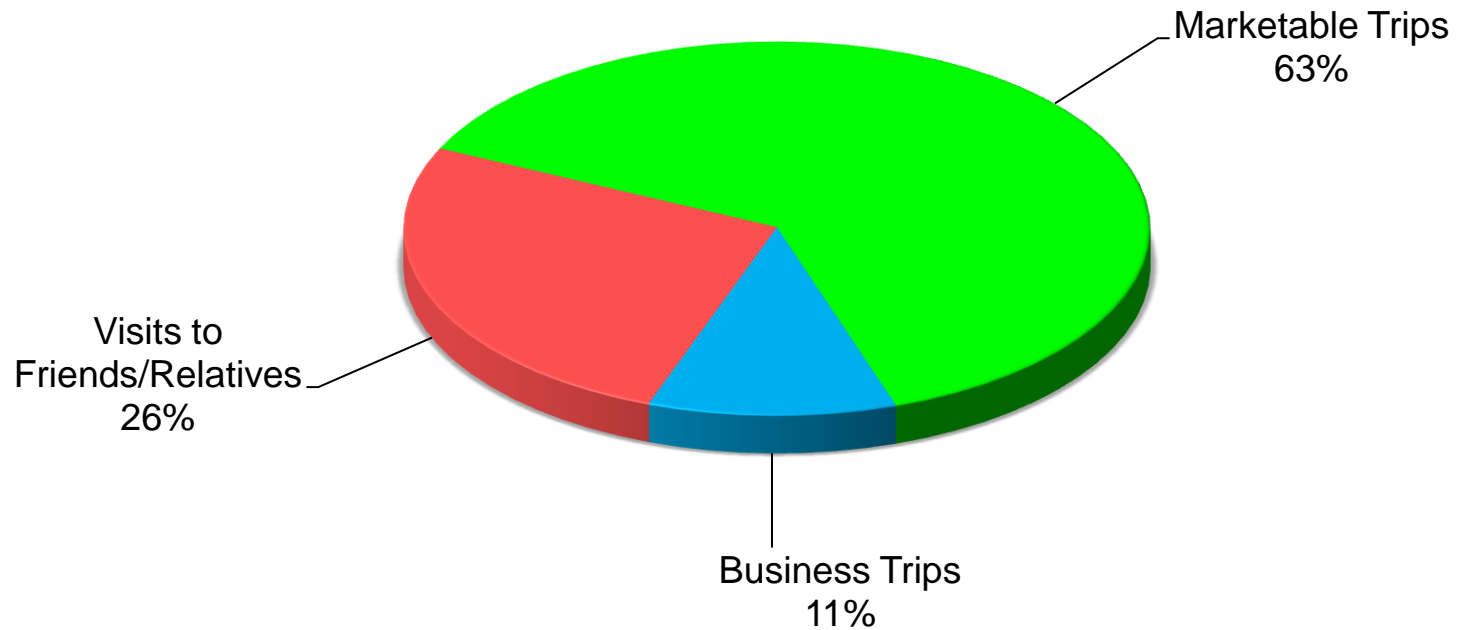
Total Day Trips = 38.2 Million



Oregon's Day Travel Market — by Trip Purpose



Base: Total Day Trips





Overnight Trip Detail

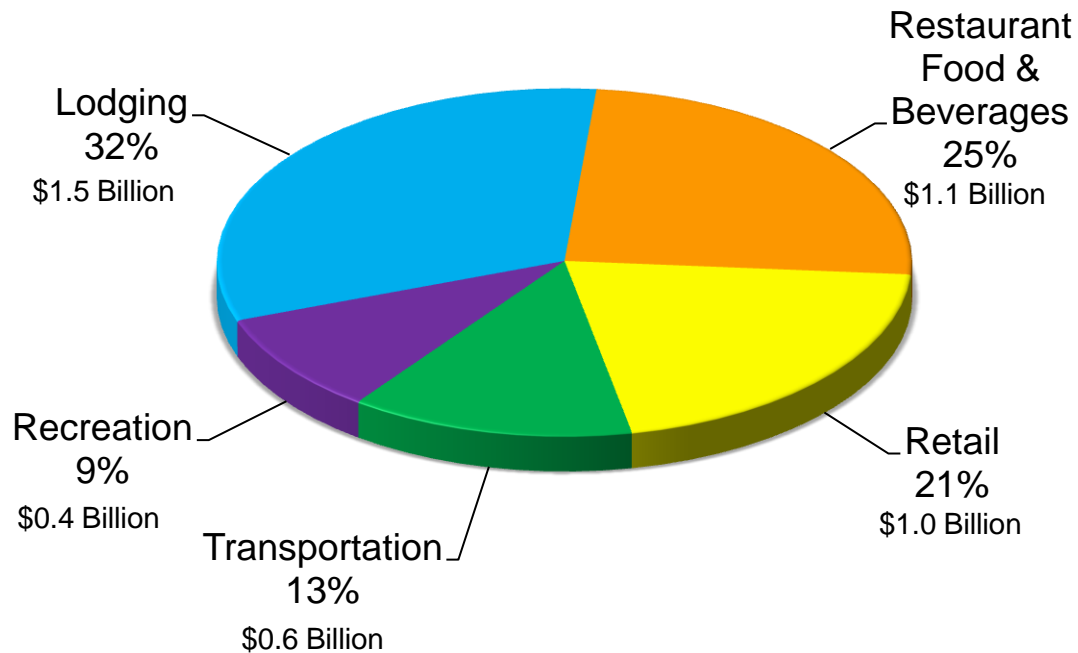


Overnight Expenditures

Total Overnight Spending – by Sector



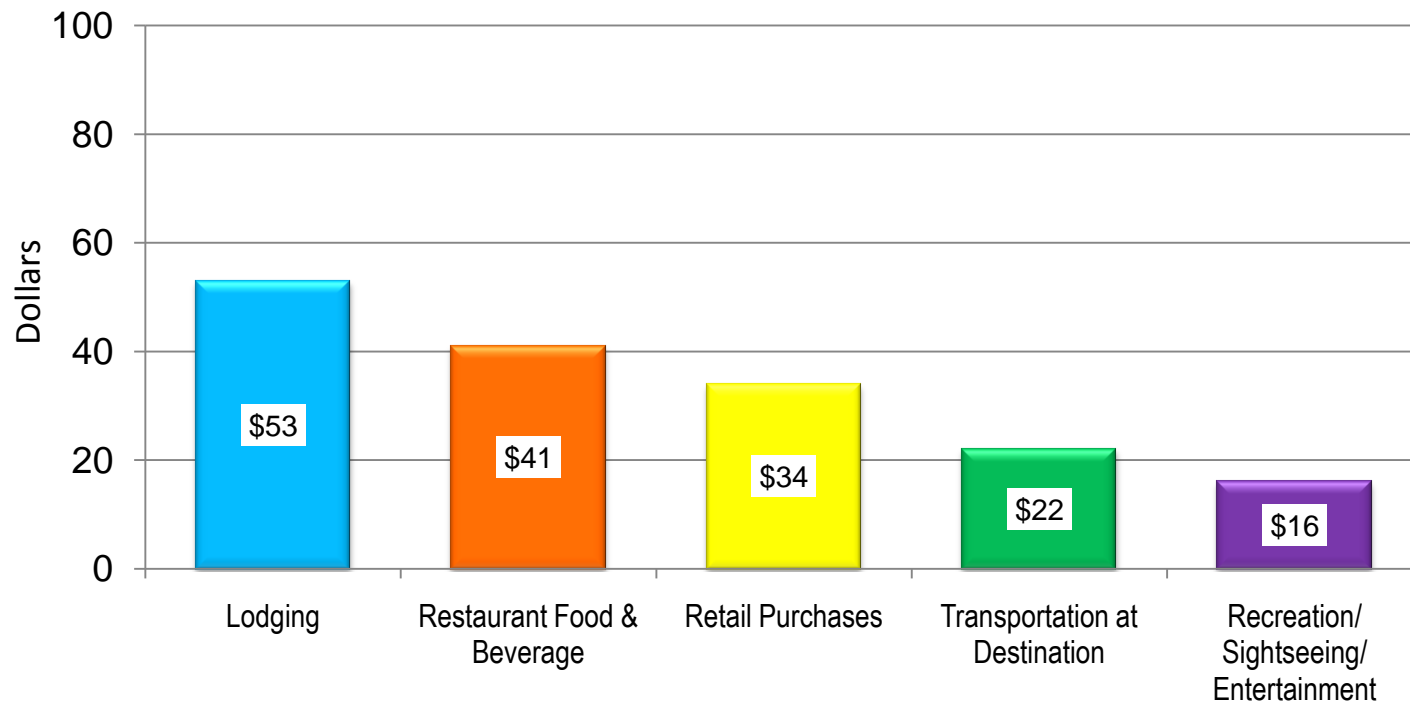
Total Spending = \$4.6 Billion



Average Per Person Expenditures on Overnight Trips — By Sector



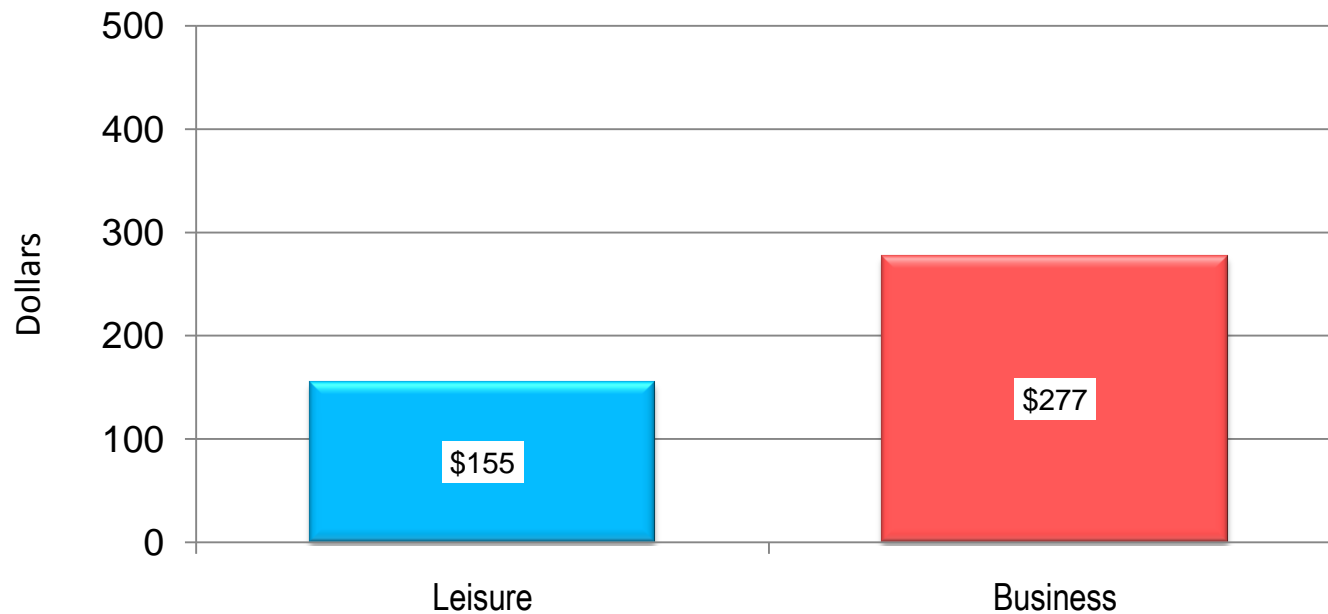
Base: Total Overnight Trips



Average Per Person Expenditures on Overnight – by Trip Purpose



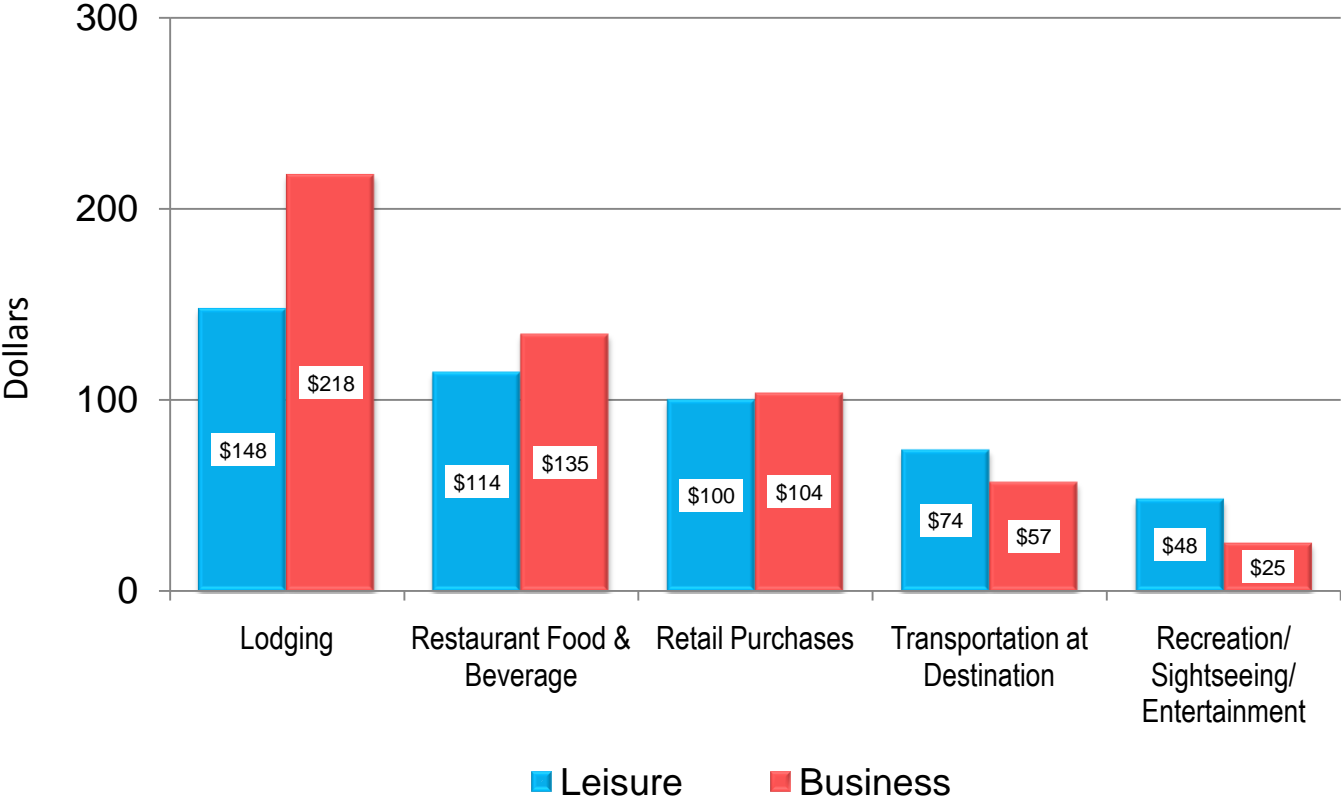
Base: Total Overnight Trips



Average Per Party Expenditures on Overnight Trips – By Trip Purpose



Base: Total Overnight Trips



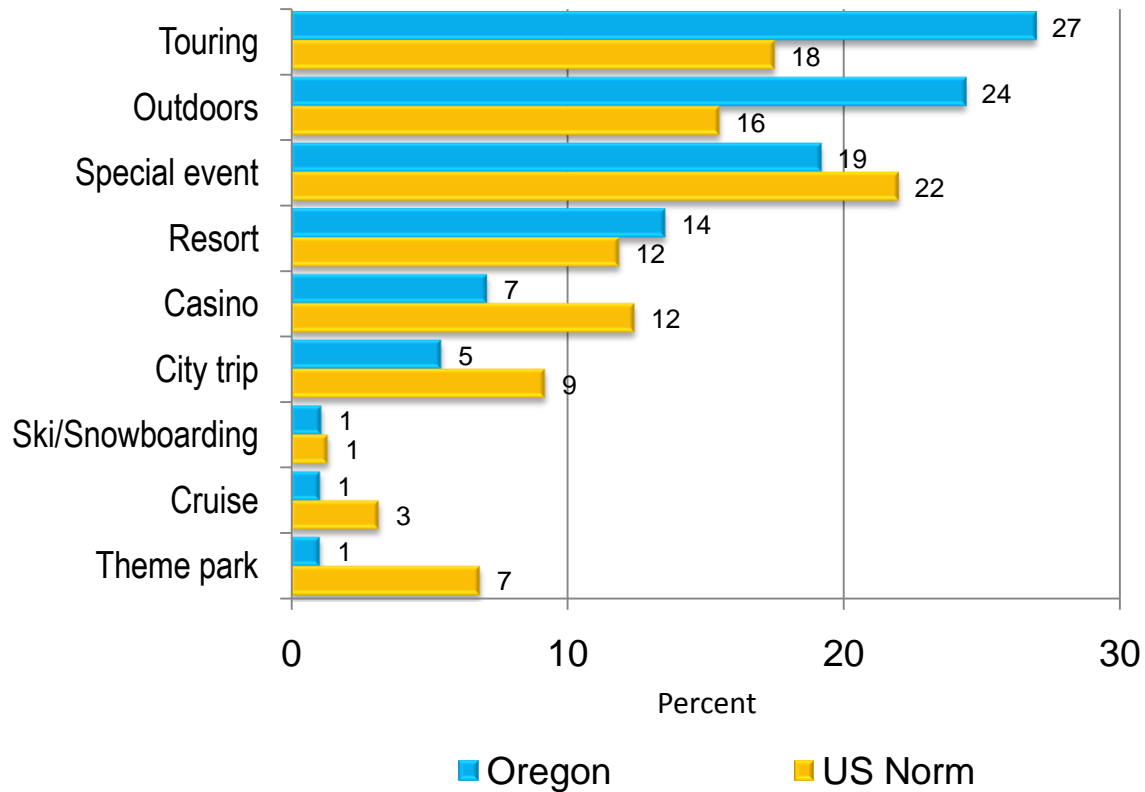


Overnight Trip Characteristics

Main Purpose of Marketable Trip — Oregon vs. National Norm



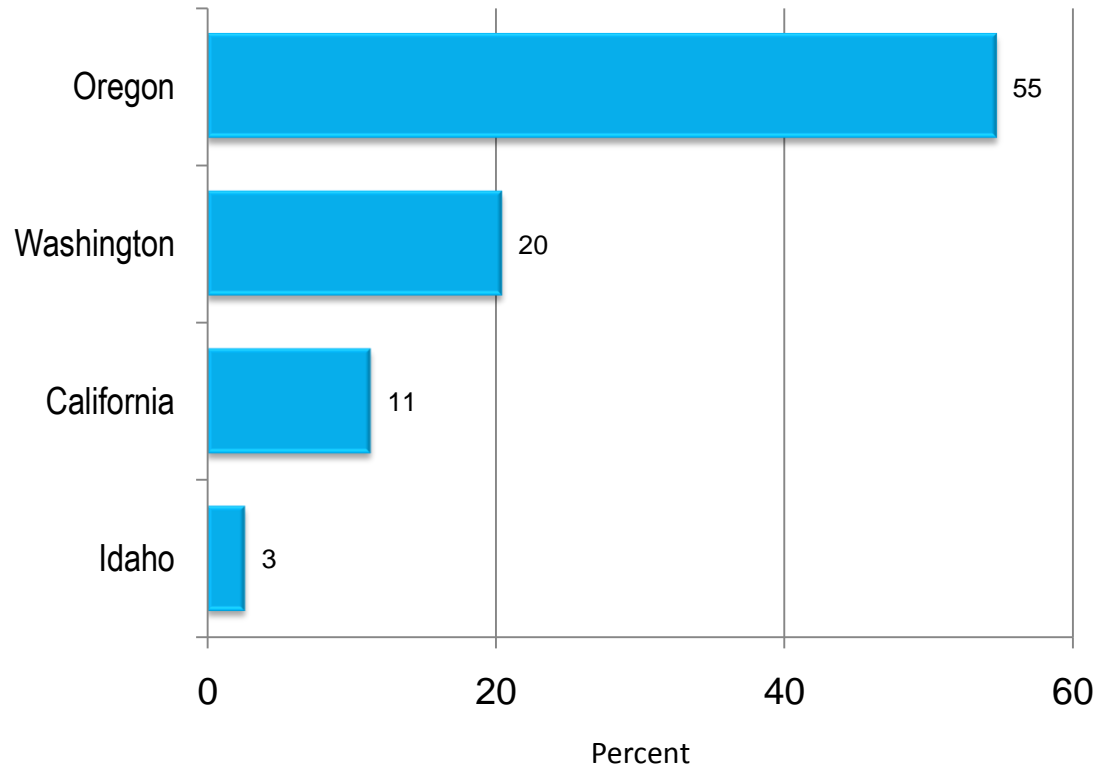
Base: Overnight Marketable Trips



State Origin Of Trip



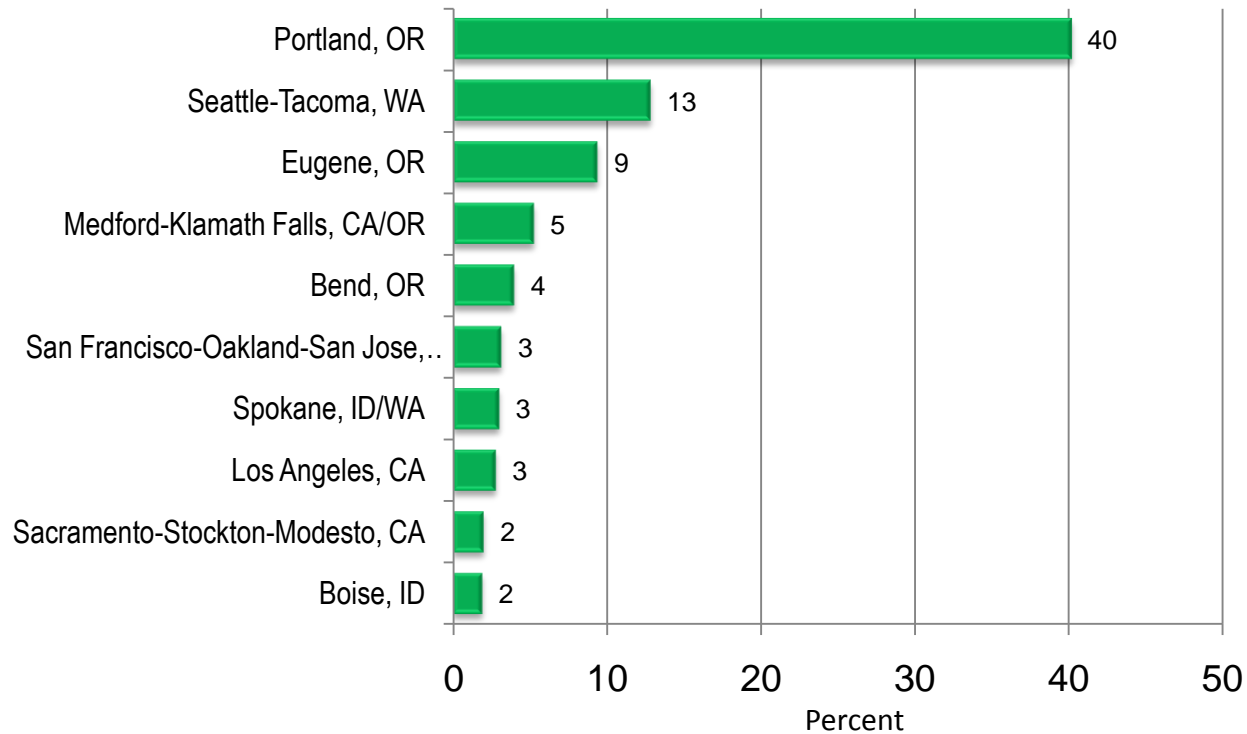
Base: Overnight Marketable Trips to Oregon



DMA Origin Of Trip



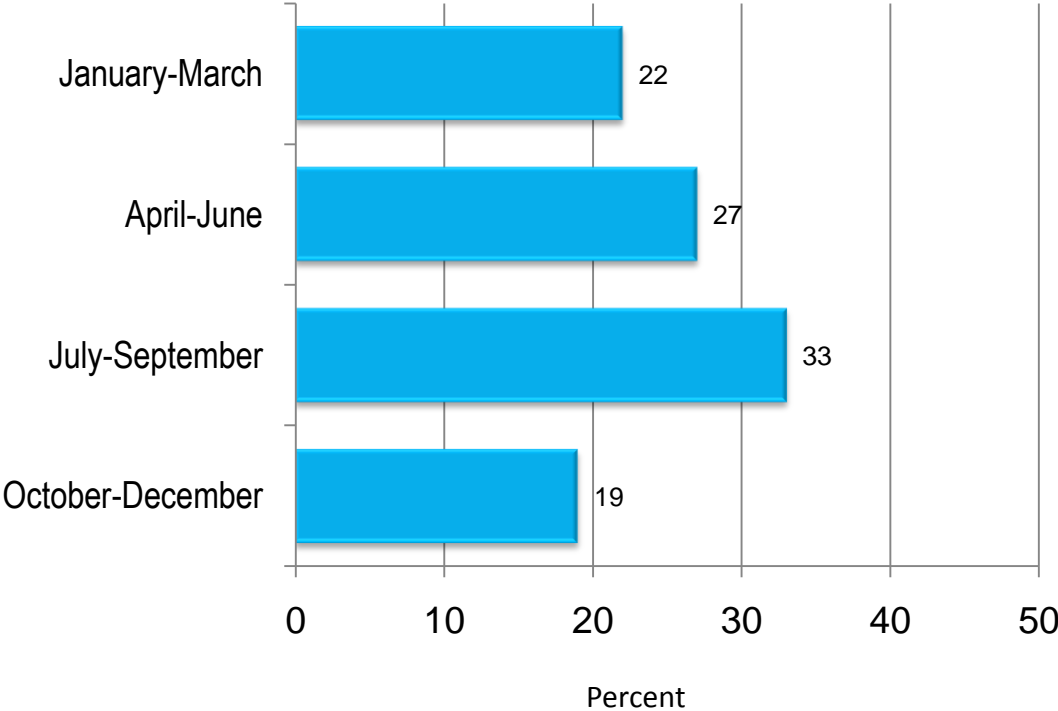
Base: Overnight Marketable Trips



Season of Trip



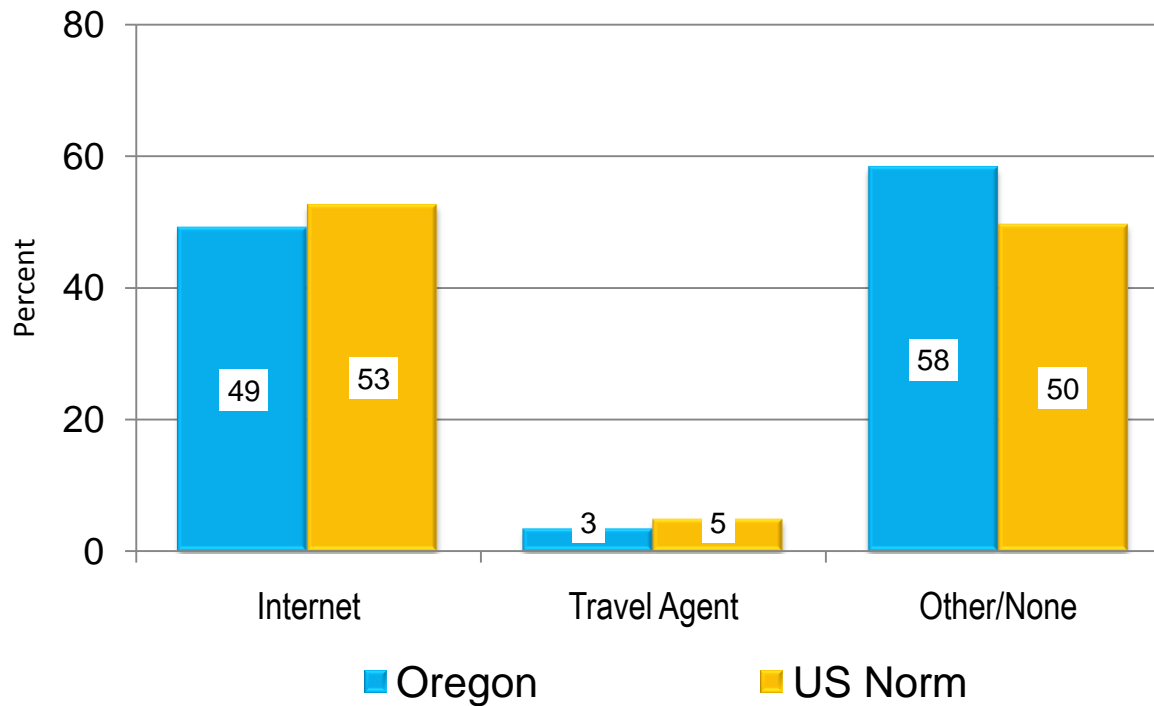
Base: Overnight Marketable Trips



Method of Planning Trip



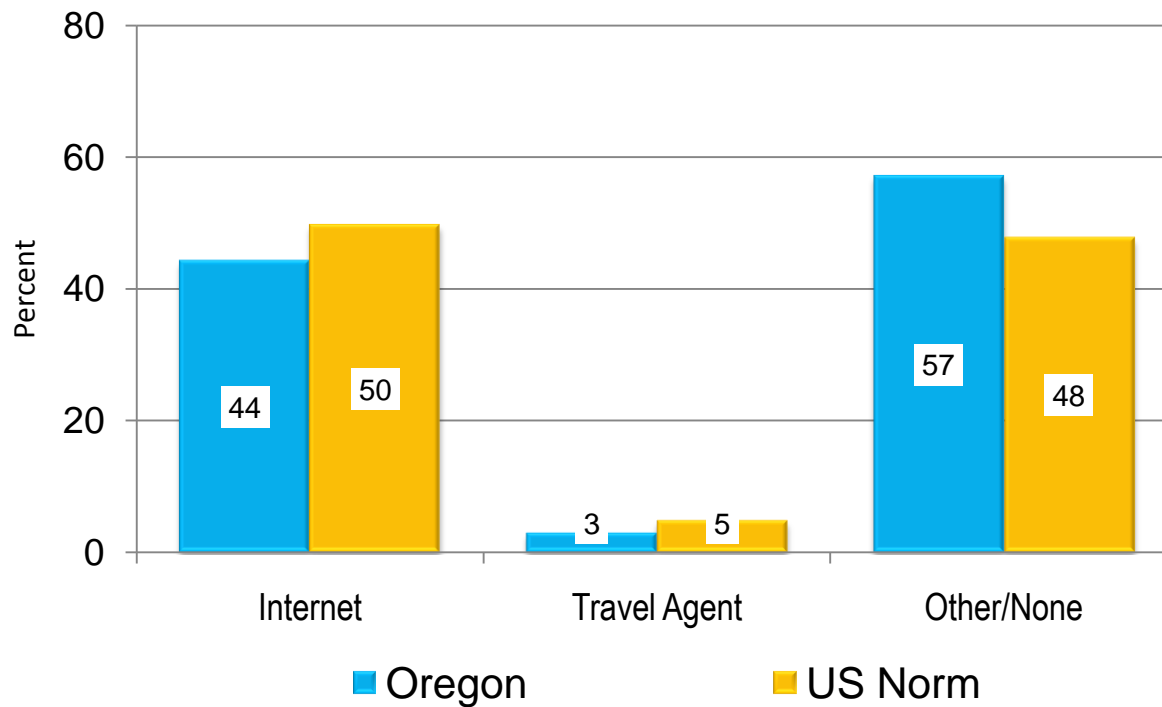
Base: Overnight Marketable Trips



Method of Booking Trip



Base: Overnight Marketable Trips



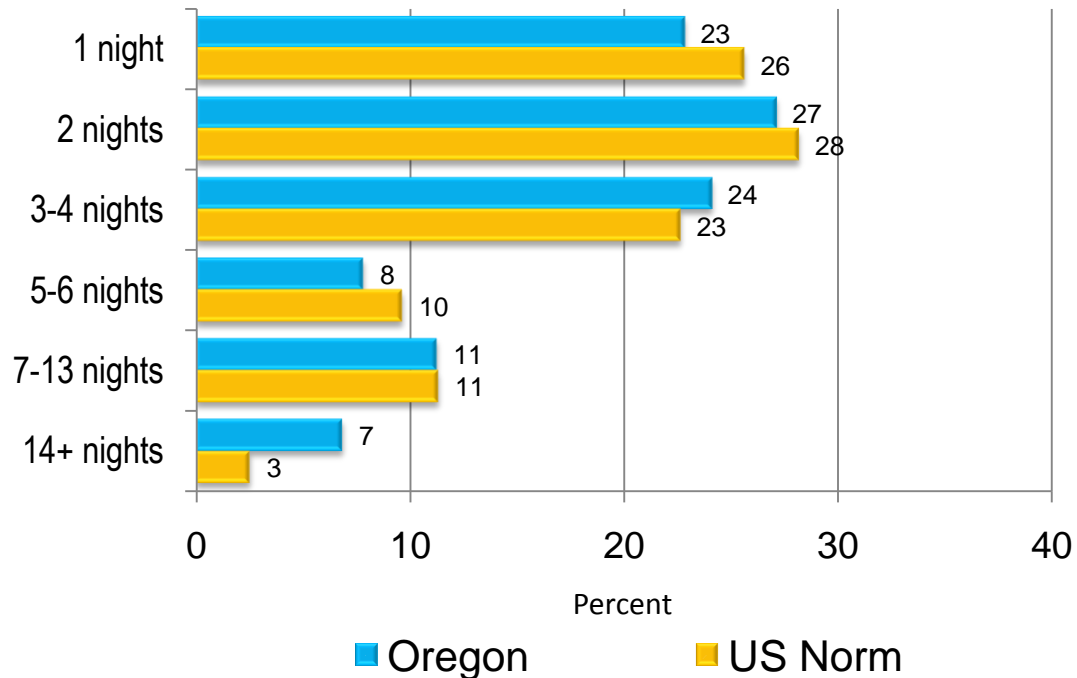
Total Nights Away on Trip



Base: Overnight Marketable Trips

**Average
Oregon
= 4.5 Nights**

**Average
US Norm
= 3.5 Nights**

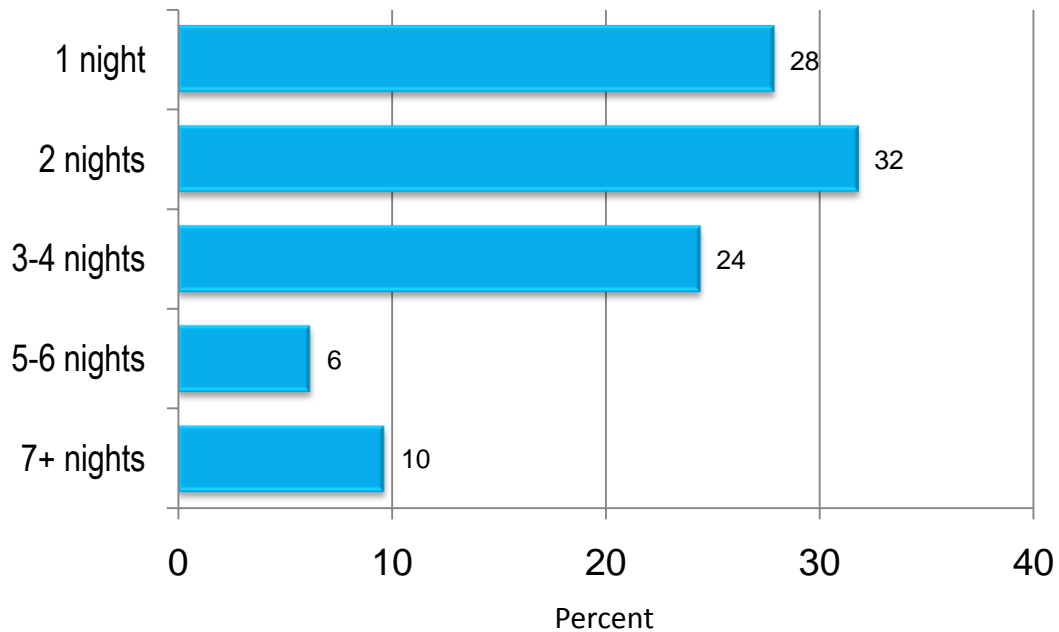


Number of Nights Spent in Oregon



Base: Overnight Marketable Trip with 1+ Nights Spent In Oregon

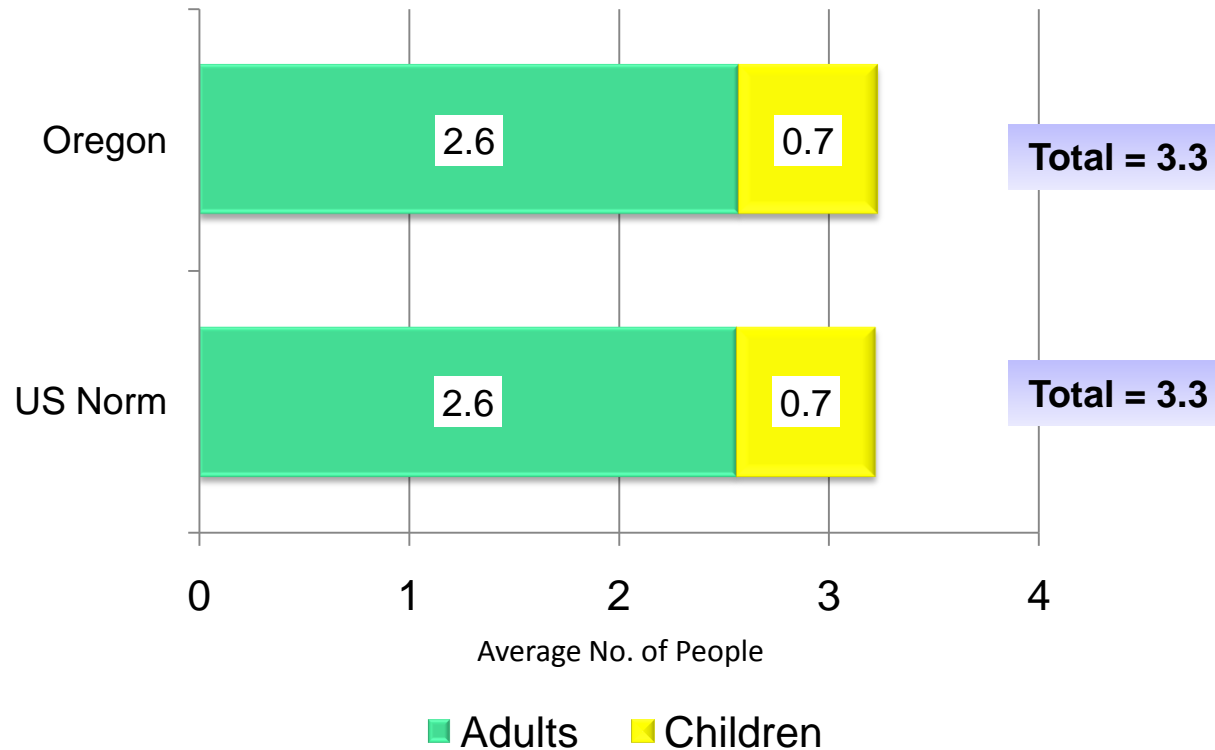
Average Nights Spent in Oregon = 3.3



Size of Travel Party



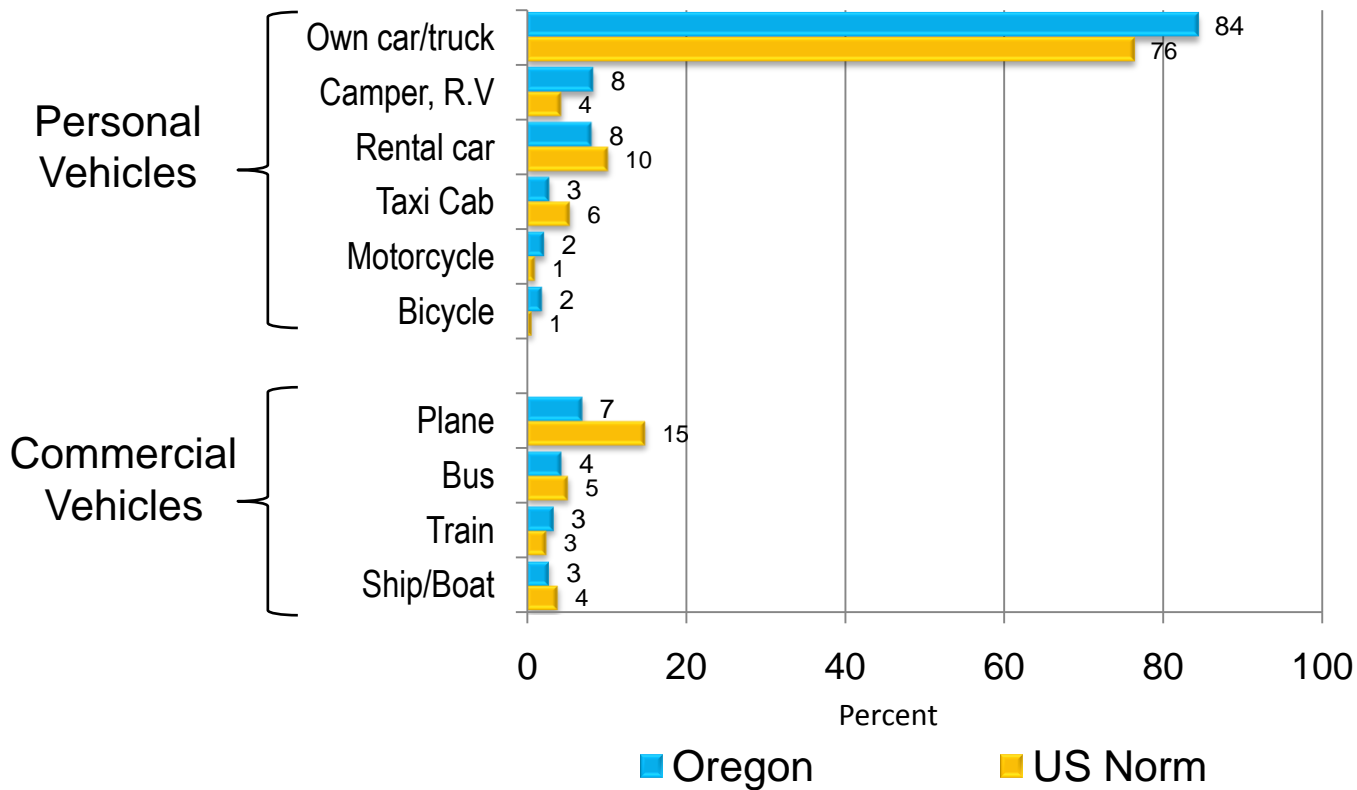
Base: Overnight Marketable Trips



Transportation



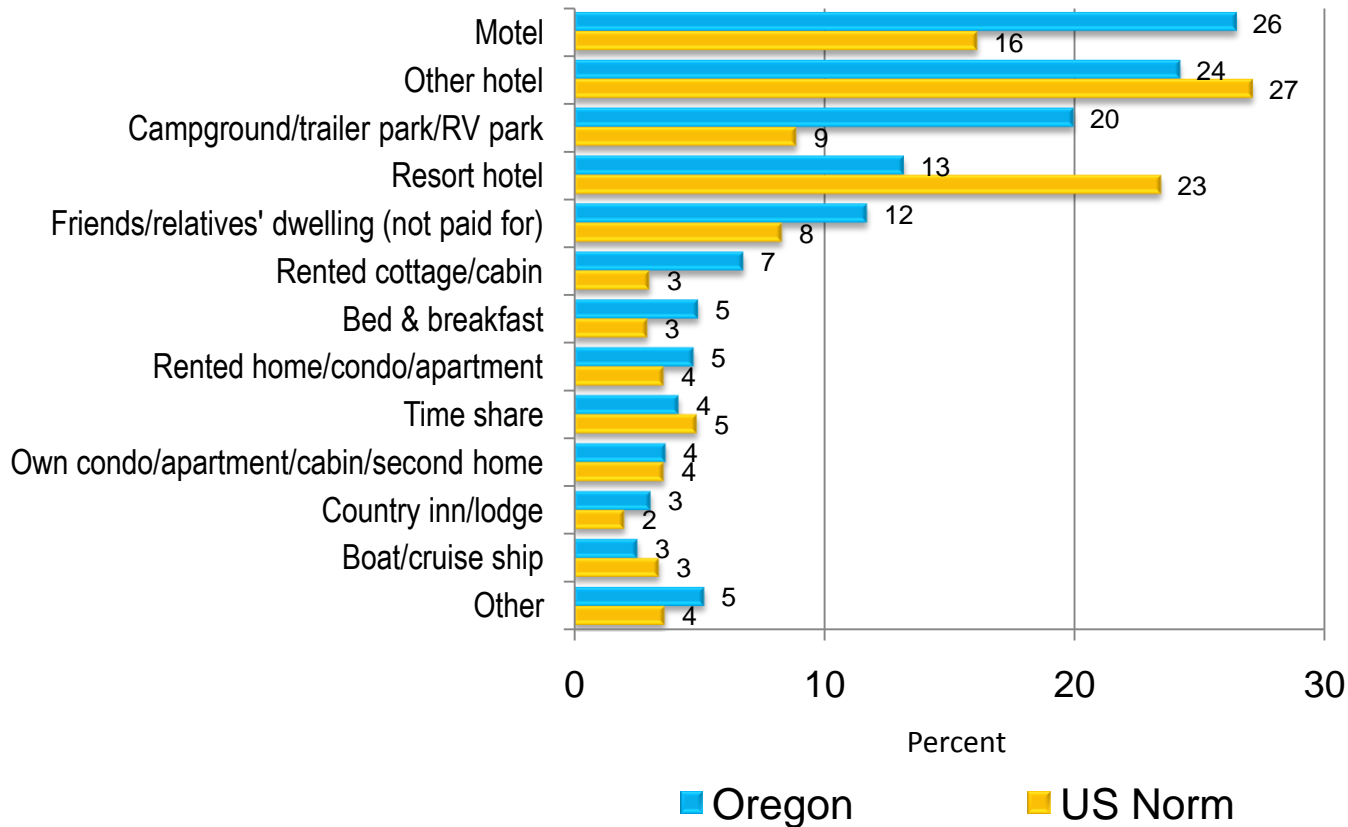
Base: Overnight Marketable Trips



Accommodation



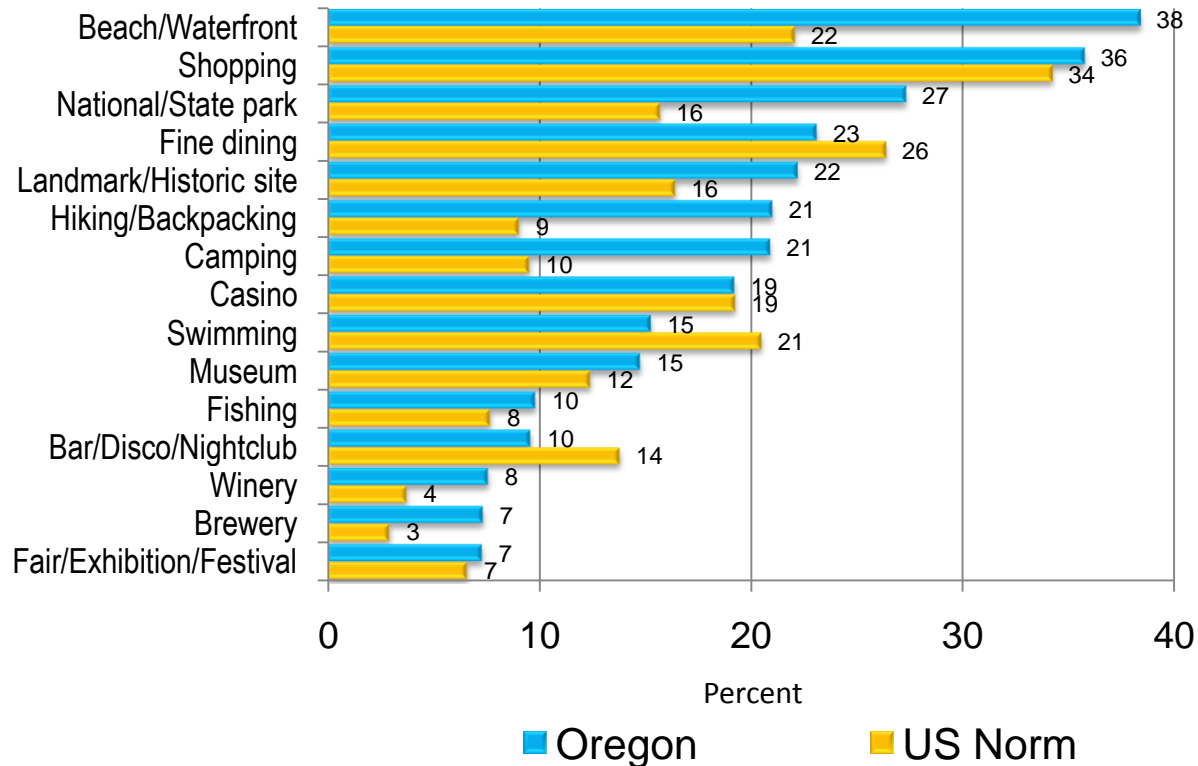
Base: Overnight Marketable Trips



Activities and Experiences



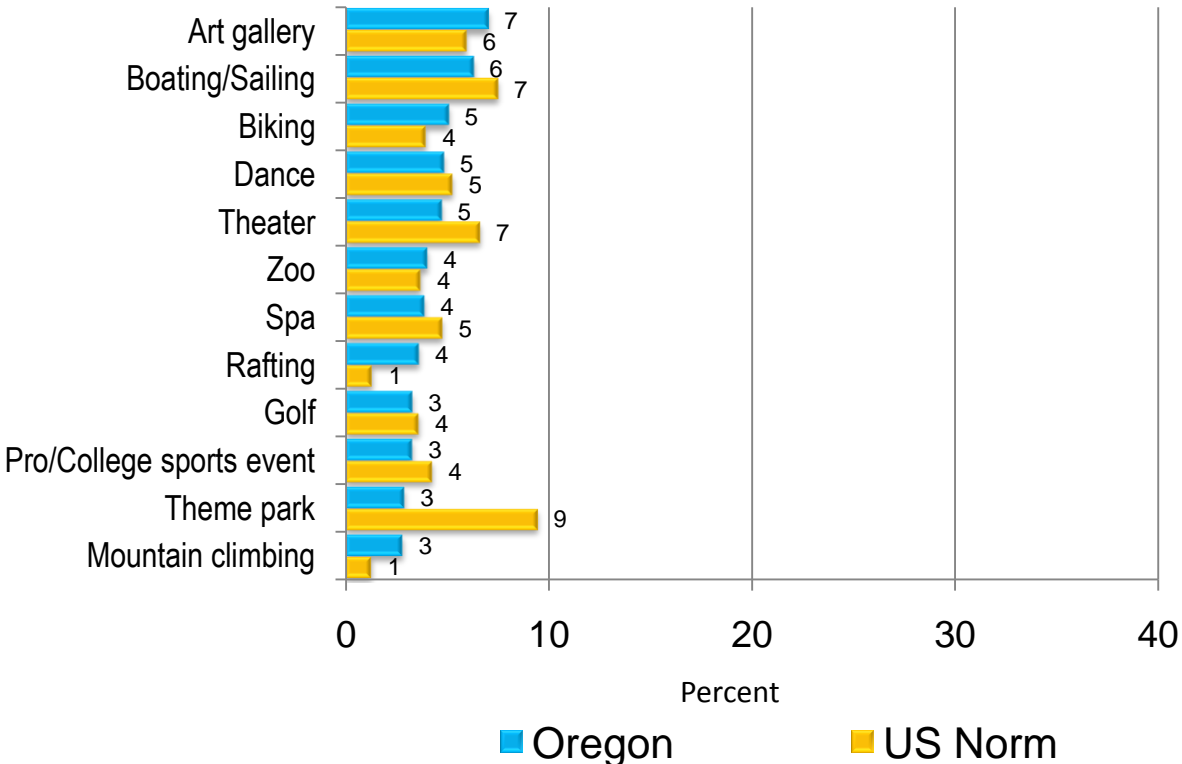
Base: Overnight Marketable Trips



Activities and Experiences



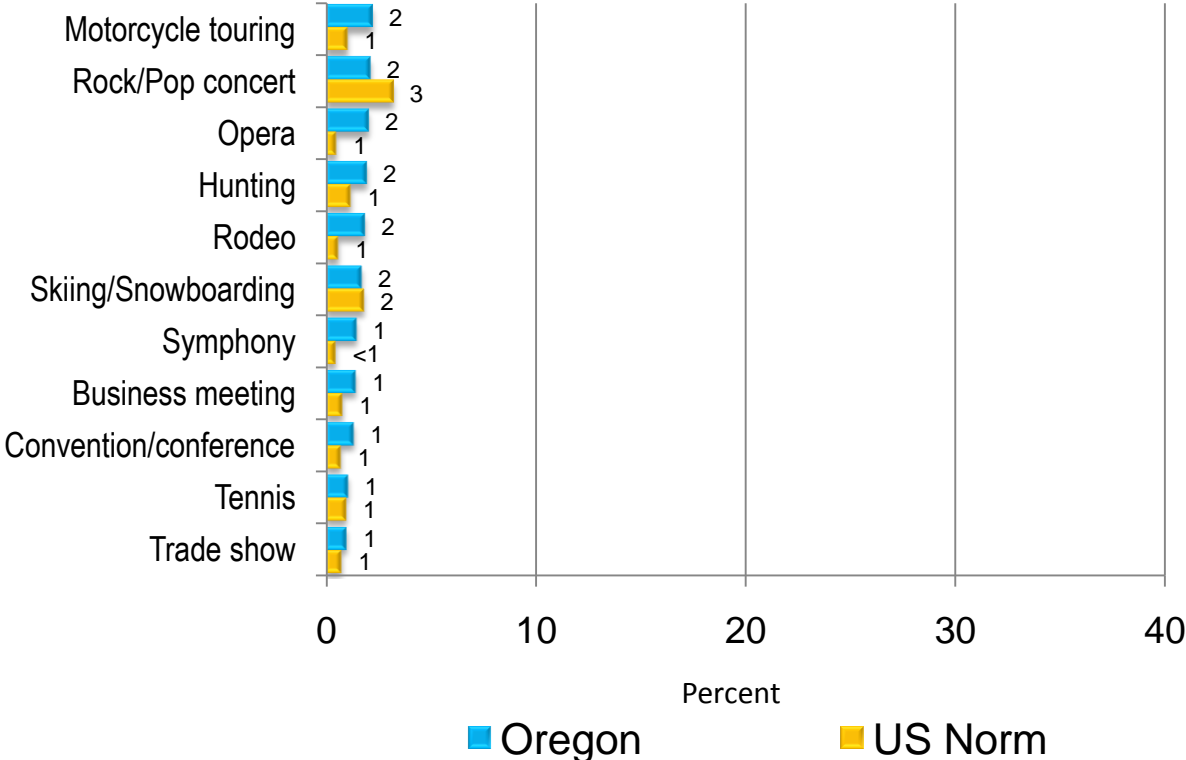
Base: Overnight Marketable Trips



Activities and Experiences



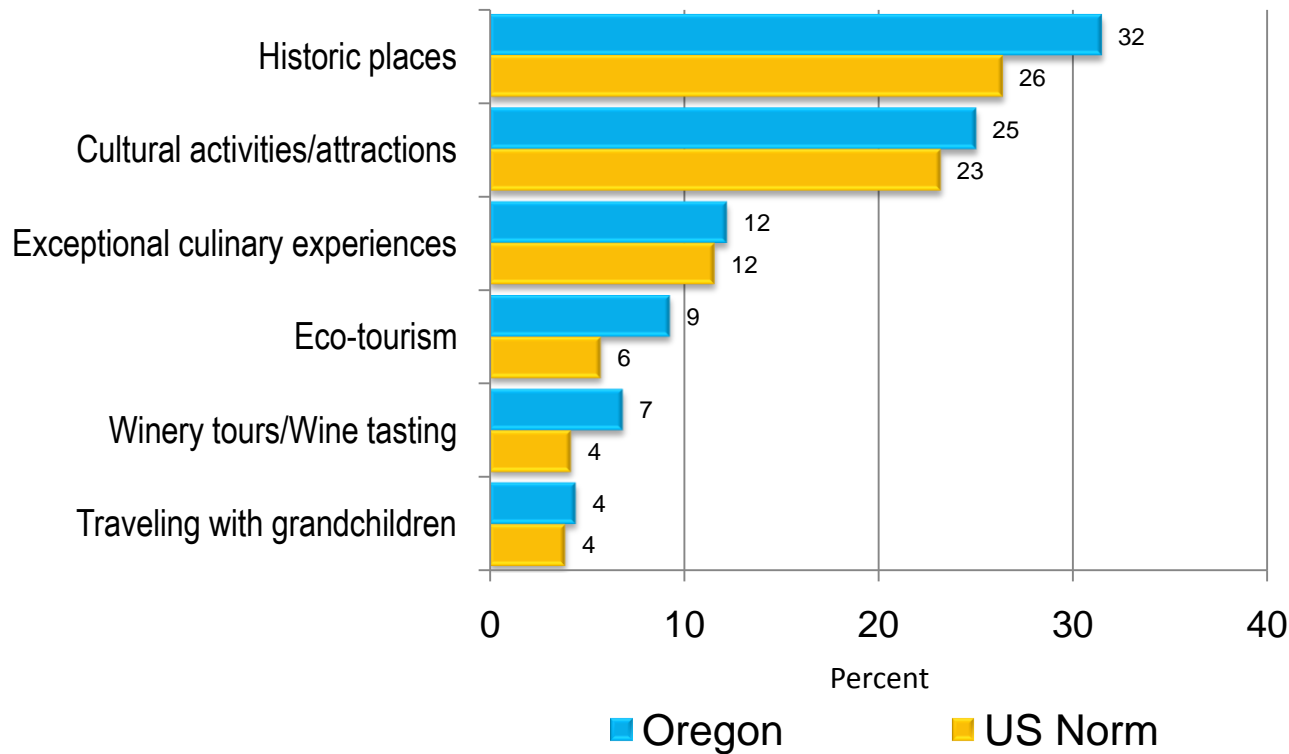
Base: Overnight Marketable Trips



Activities of Special Interest



Base: Overnight Marketable Trips





Day Trip Detail

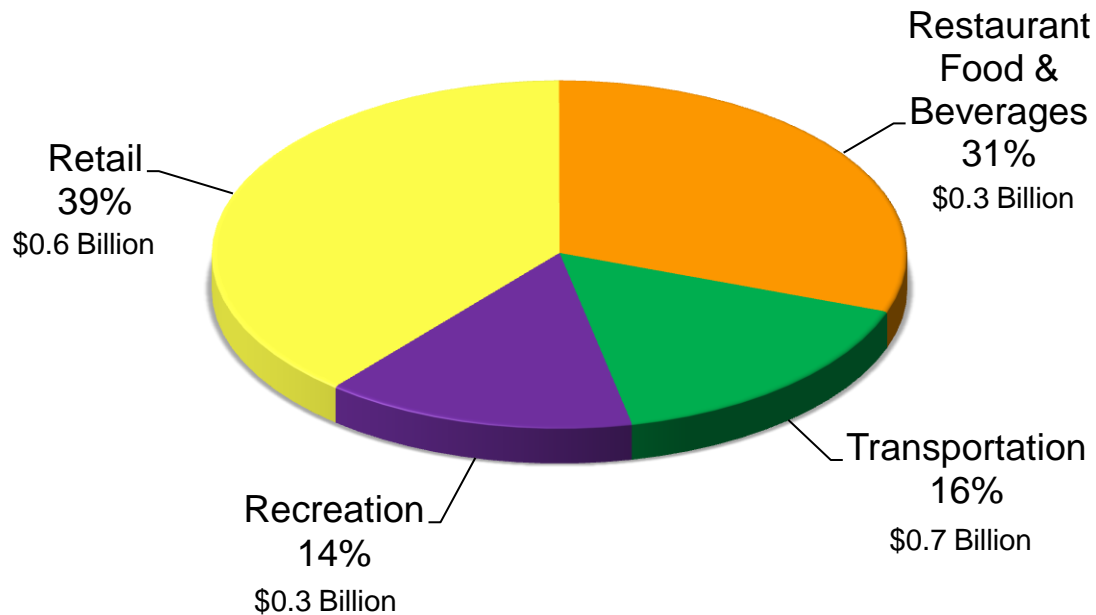


Day Trip Expenditures

Total Day Travel Spending – by Sector



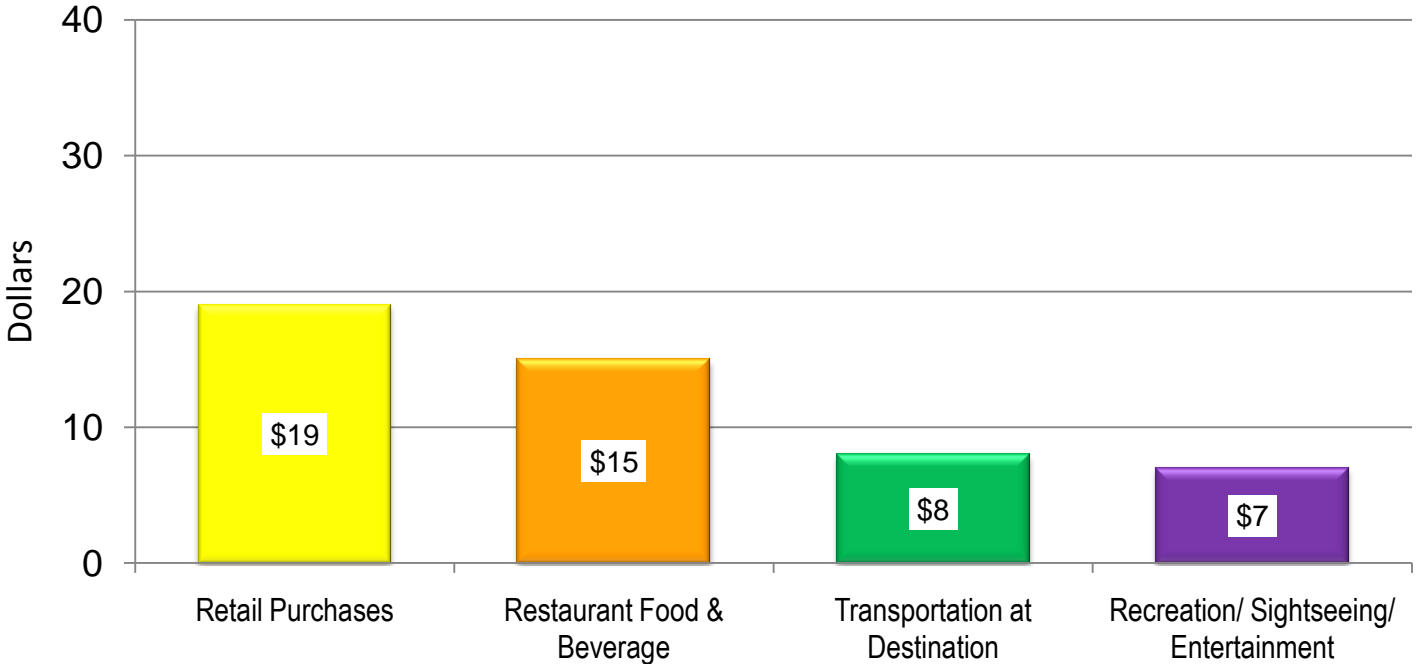
Total Spending = \$1.9 Billion



Average Per Person Expenditures on Day Trips — By Sector



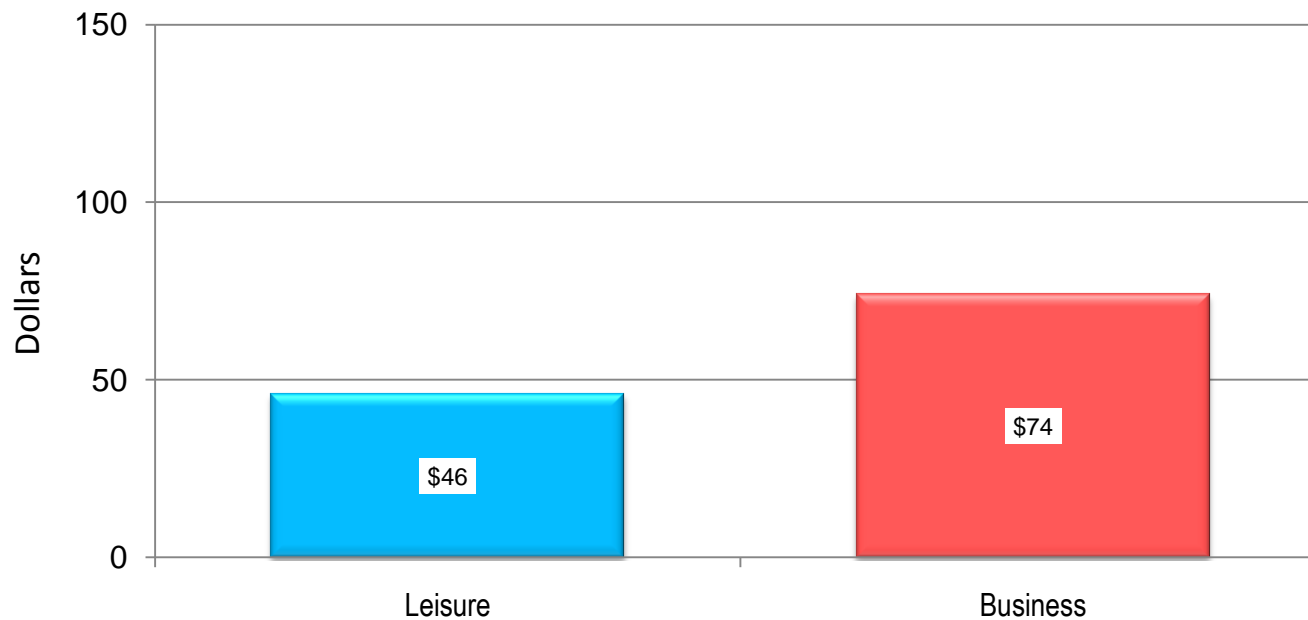
Base: Total Day Trips



Average Per Person Expenditure on Day Trips – by Trip Type



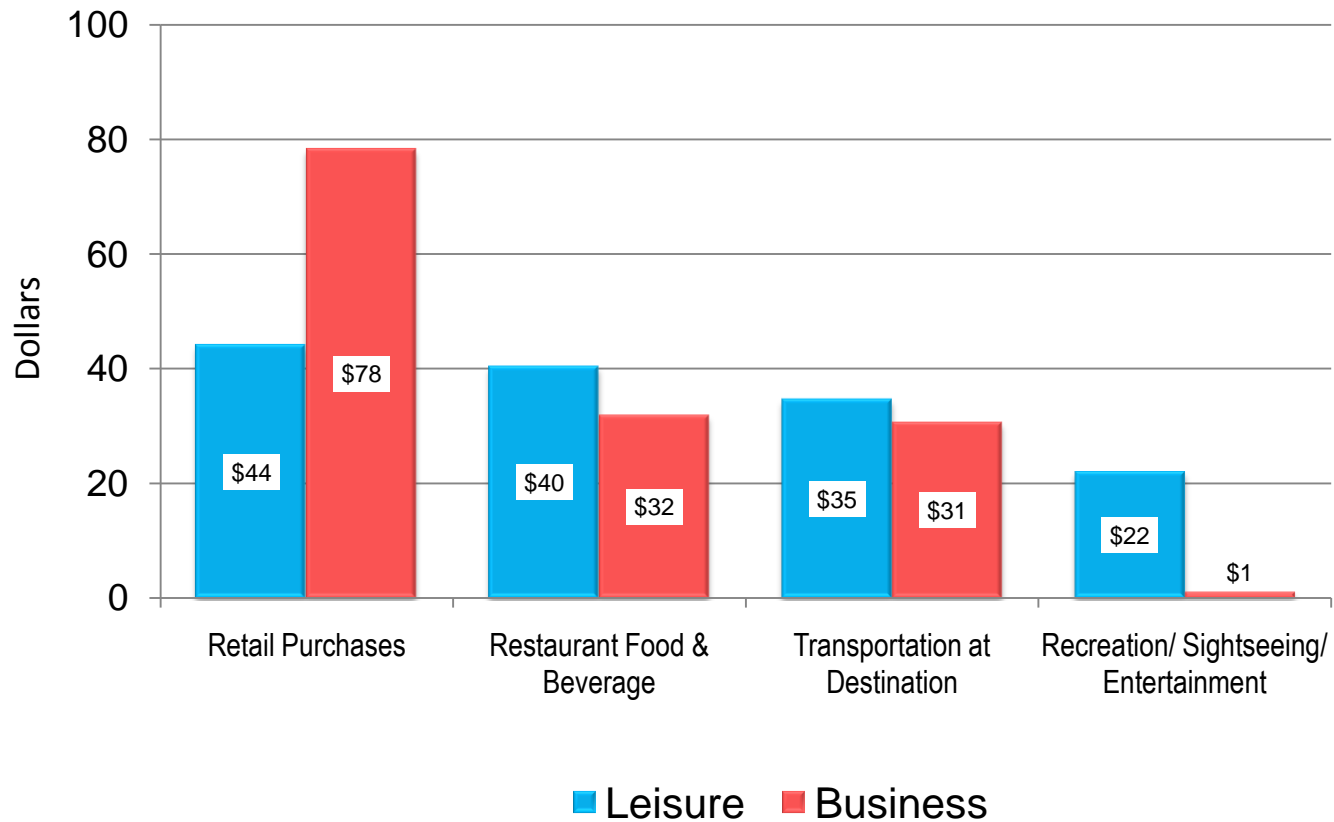
Base: Total Day Trips



Average Per Party Expenditures on Day Trips



Base: Total Day Trips



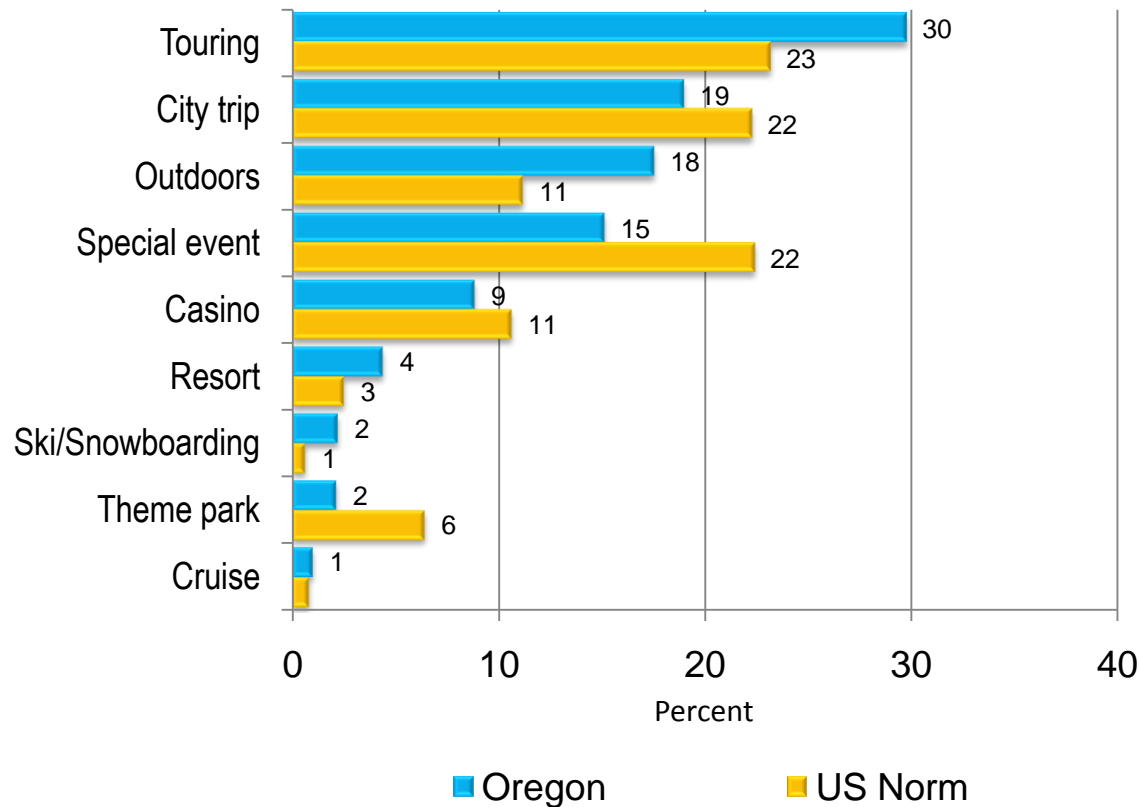


Day Trip Characteristics

Main Purpose of Marketable Trip — Oregon vs. National Norm



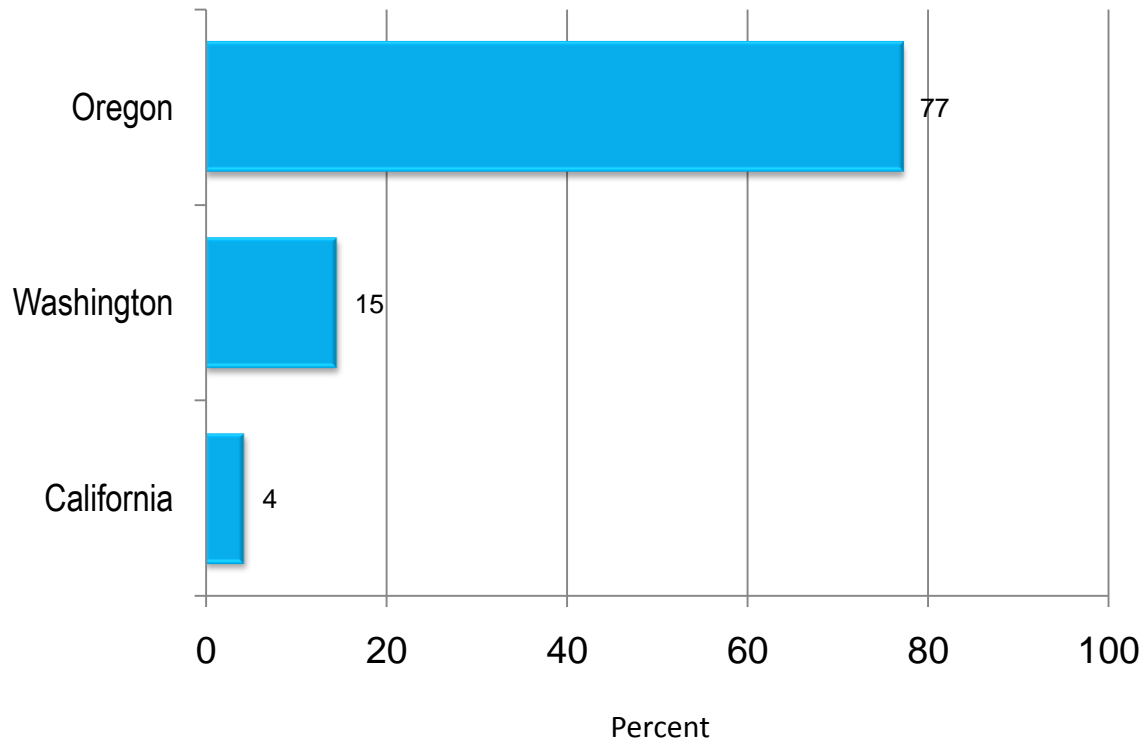
Base: Day Marketable Trips



State Origin Of Trip



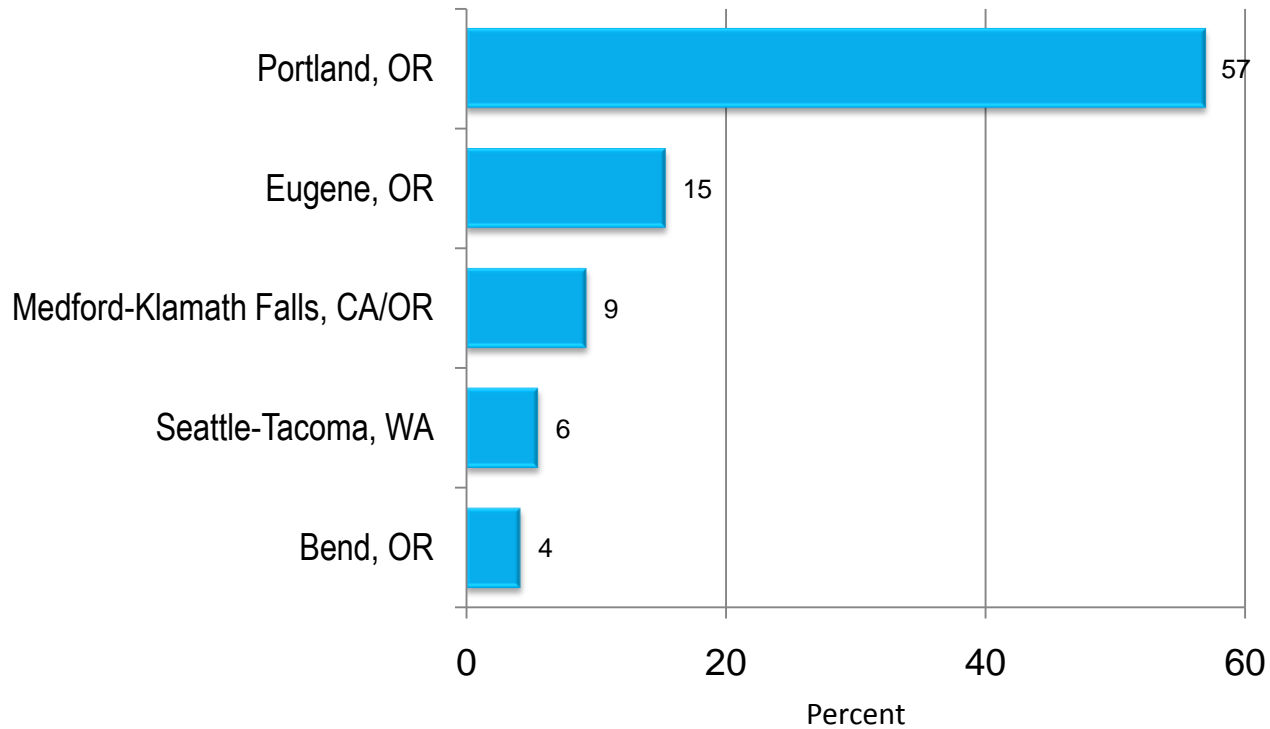
Base: Day Marketable Trips



DMA Origin Of Trip



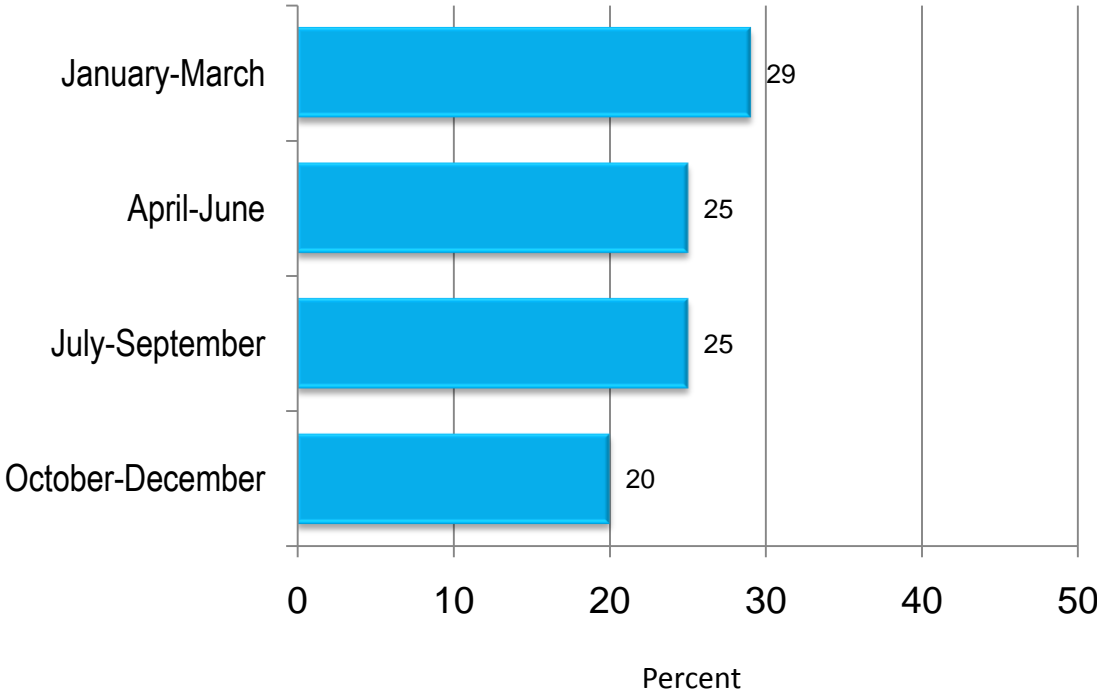
Base: Day Marketable Trips



Season of Trip



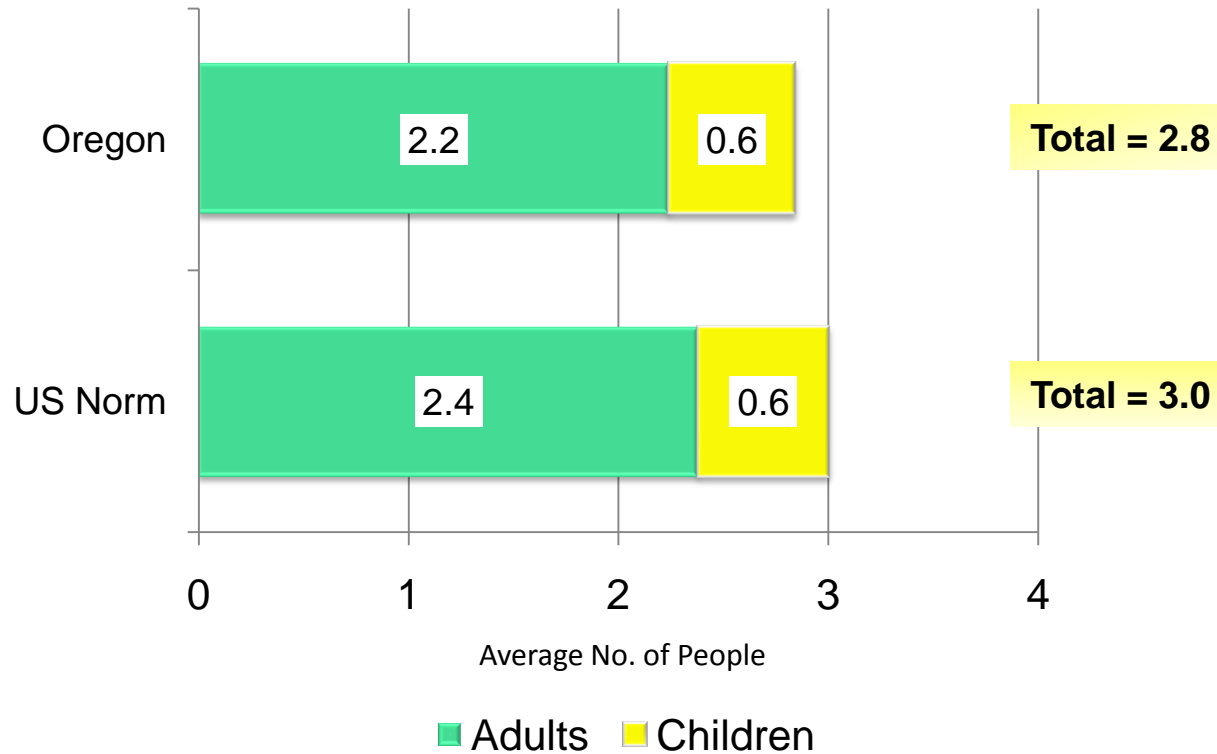
Base: Day Marketable Trips



Size of Travel Party



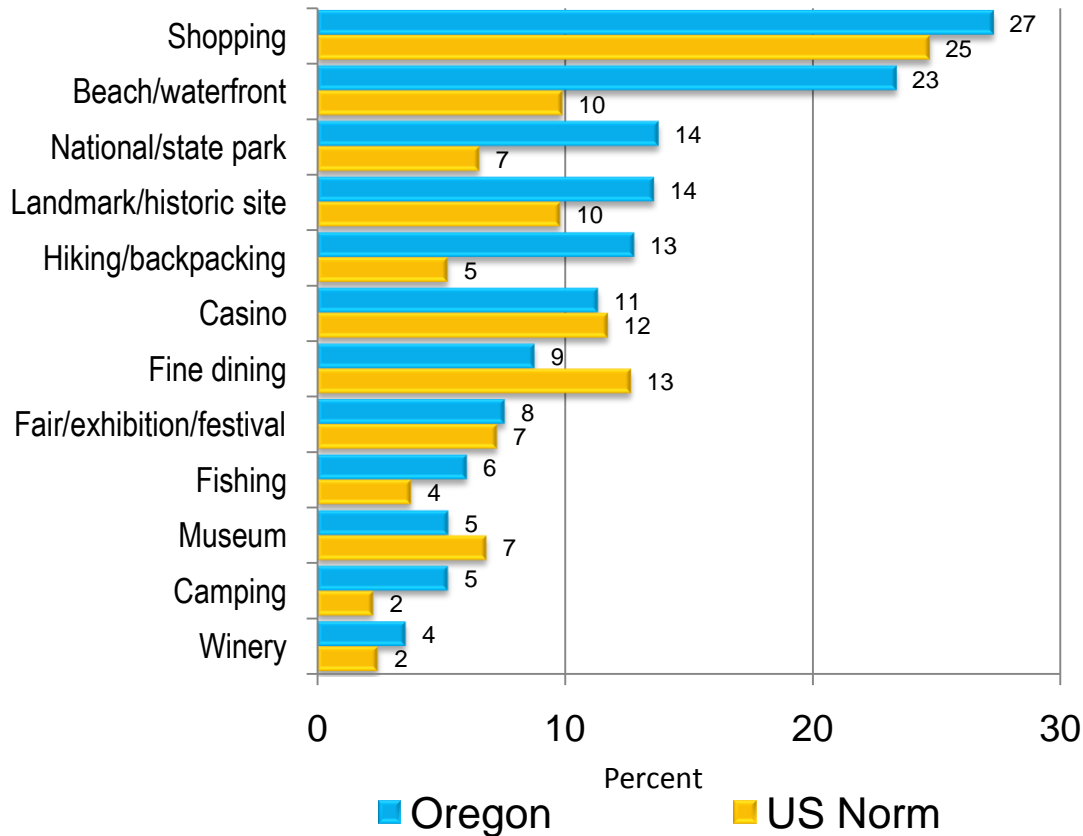
Base: Day Marketable Trips



Activities and Experiences



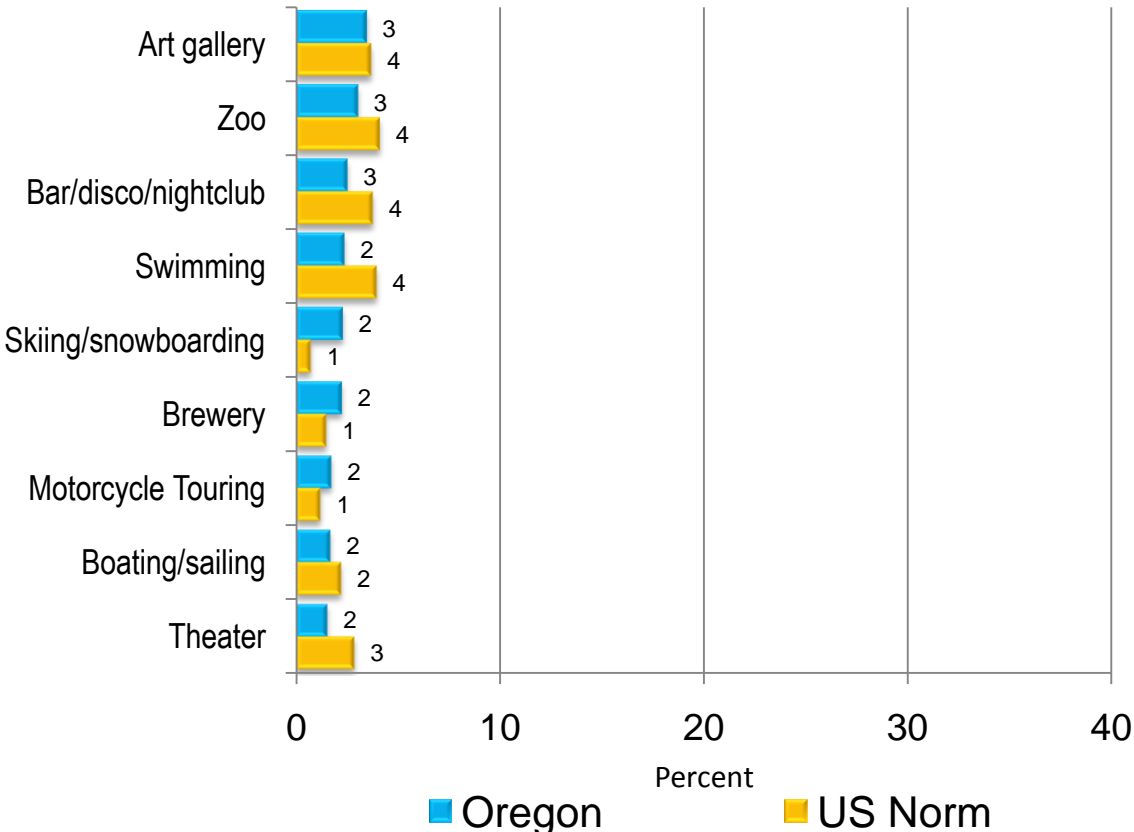
Base: Day Marketable Trips



Activities and Experiences



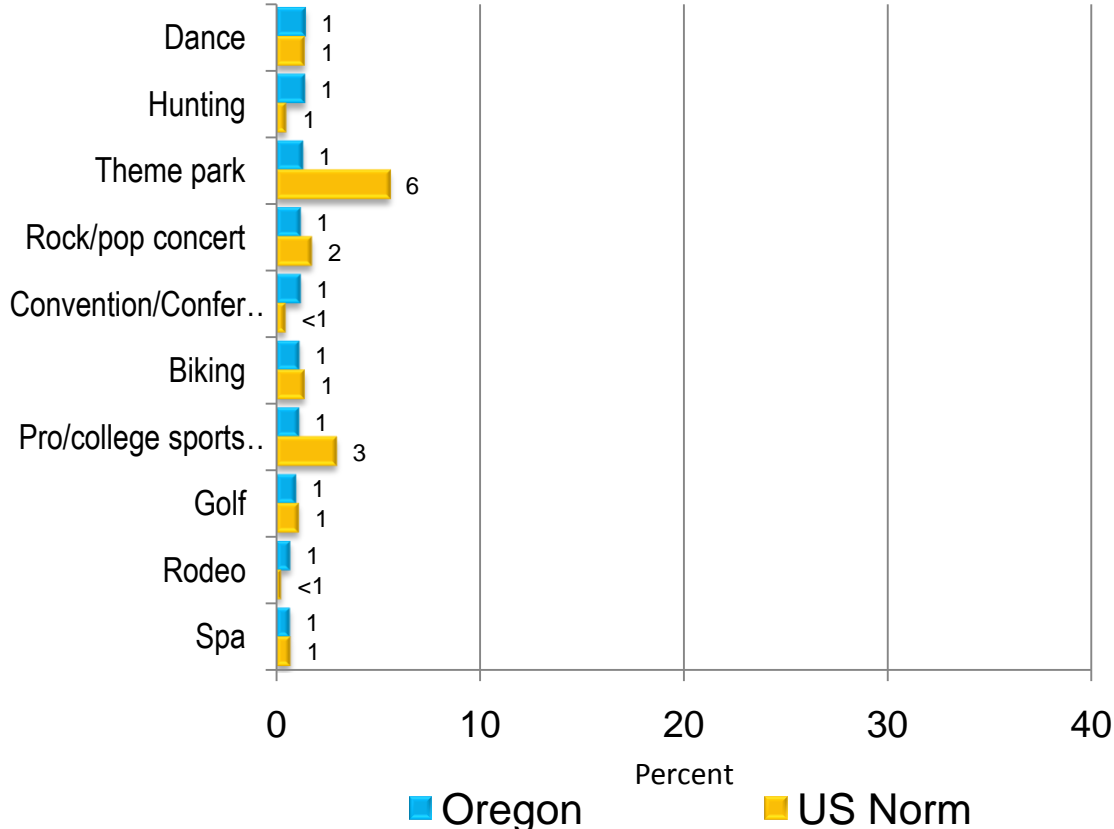
Base: Day Marketable Trips



Activities and Experiences



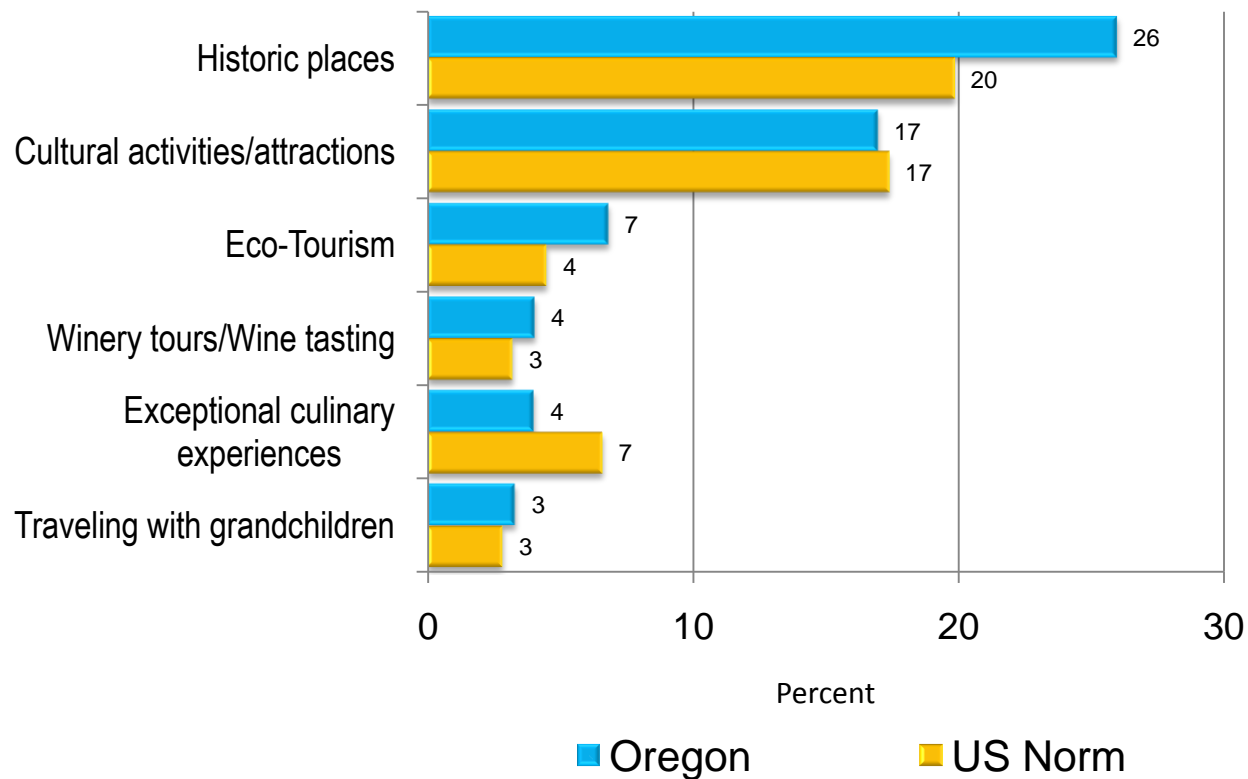
Base: Day Marketable Trips



Activities of Special Interest



Base: Day Marketable Trips



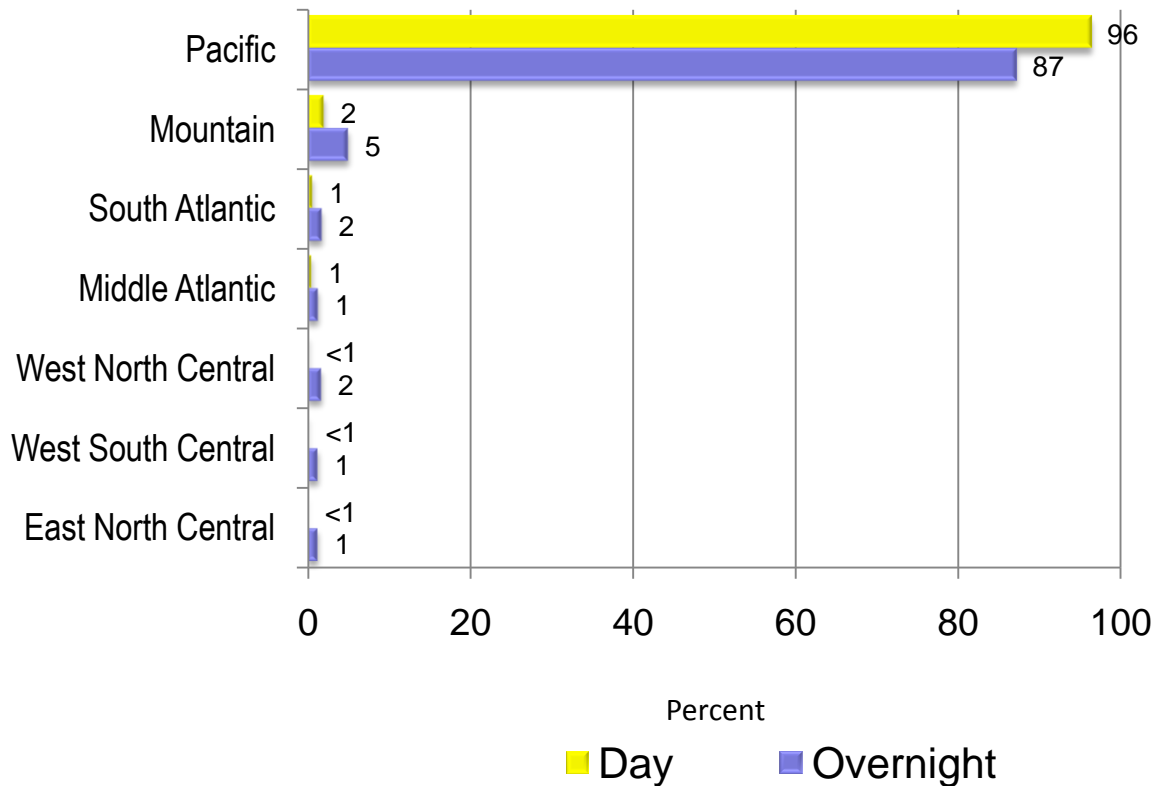


Demographic Profile of Visitors to Oregon

Region of Residence



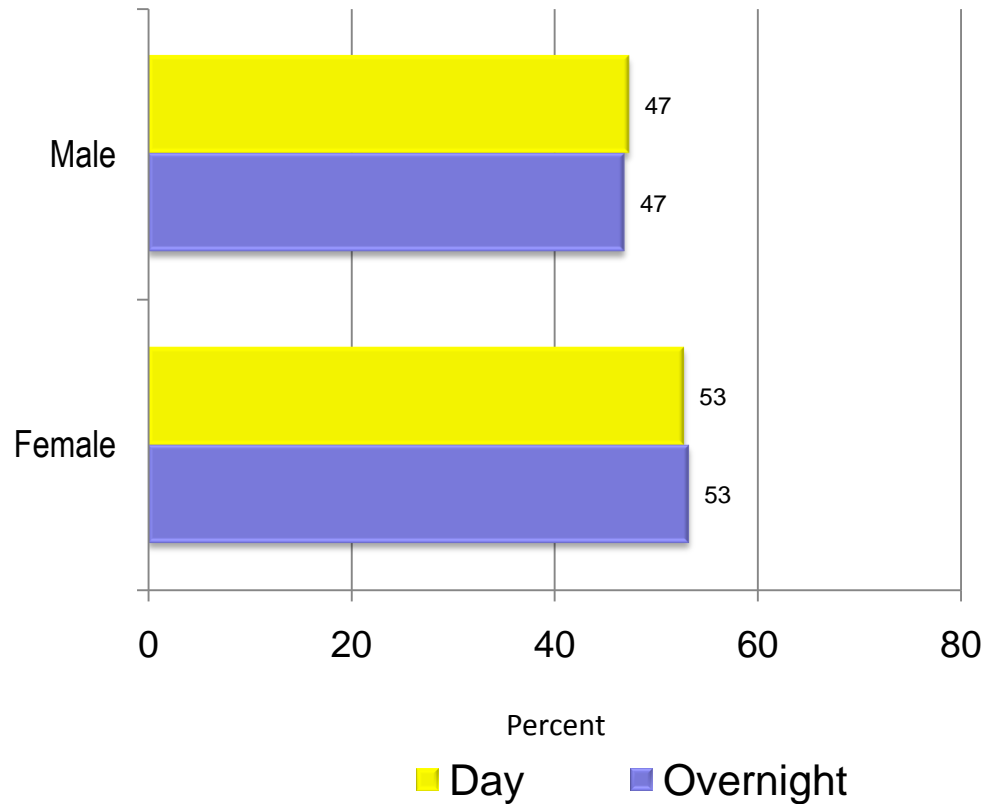
Base: Marketable Trips



Gender



Base: Marketable Trips



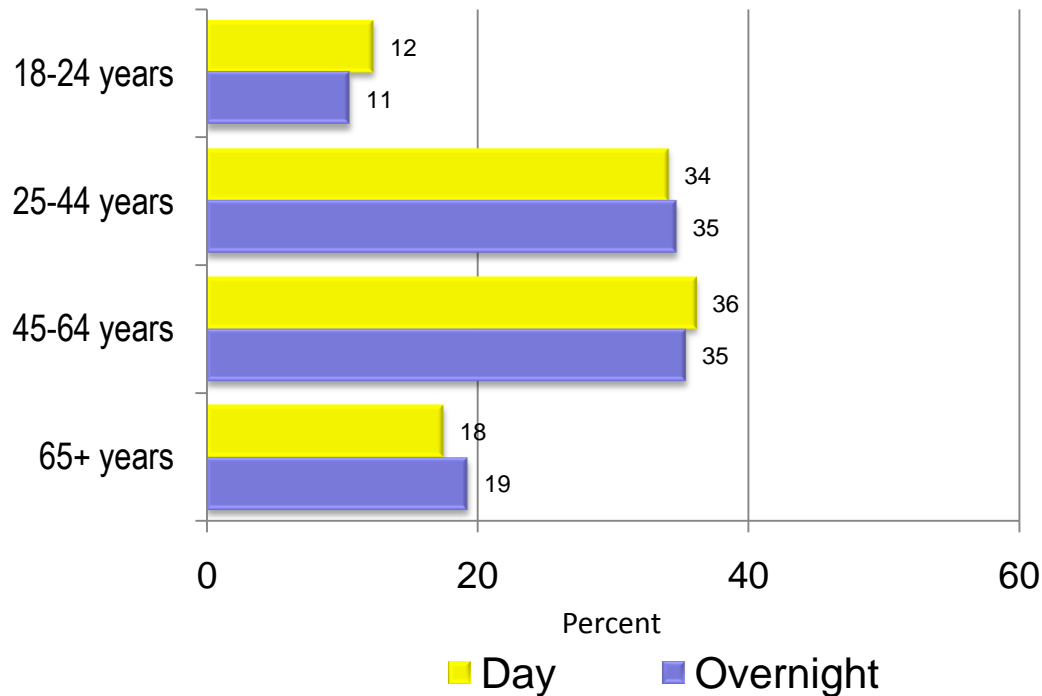
Age



Base: Marketable Trips

Average Day = 46.9

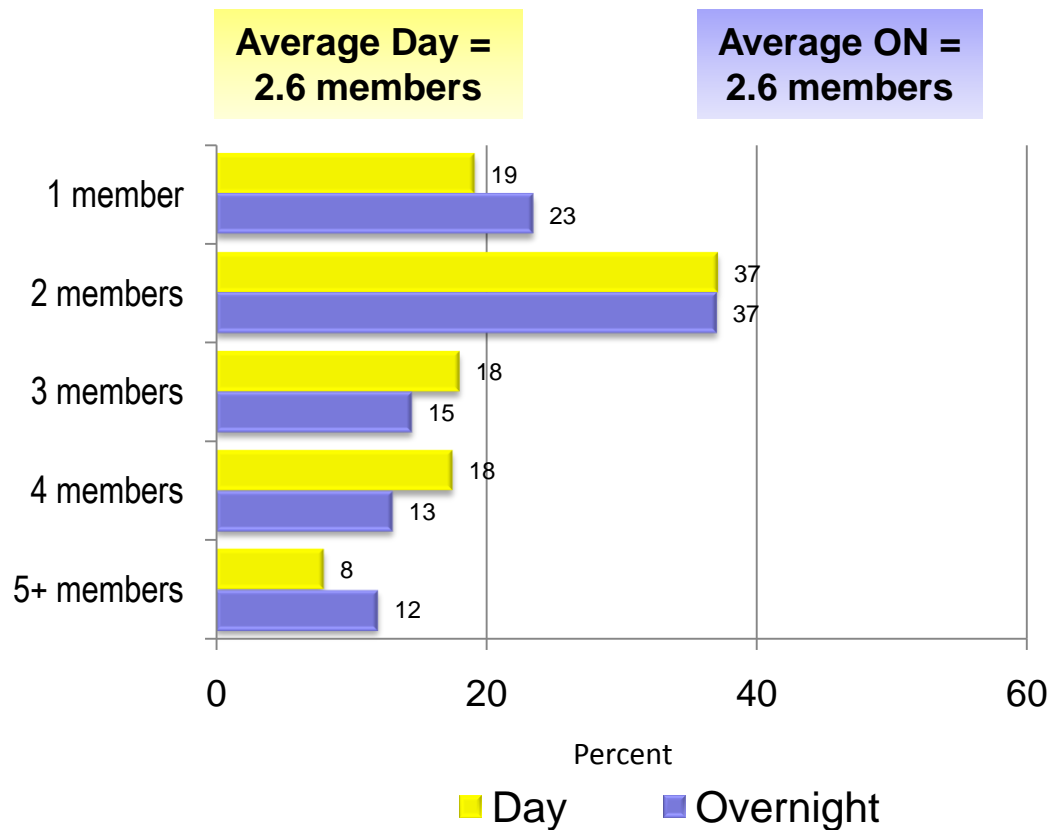
Average ON = 47.7



Household Size



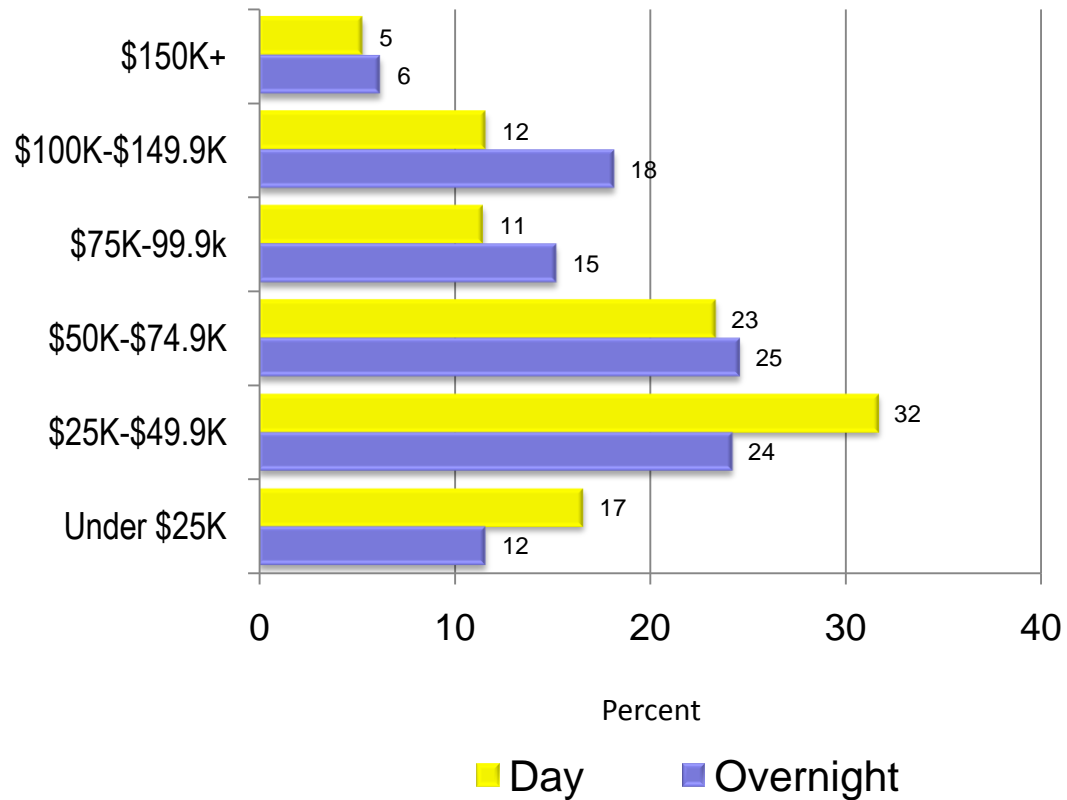
Base: Marketable Trips



Income



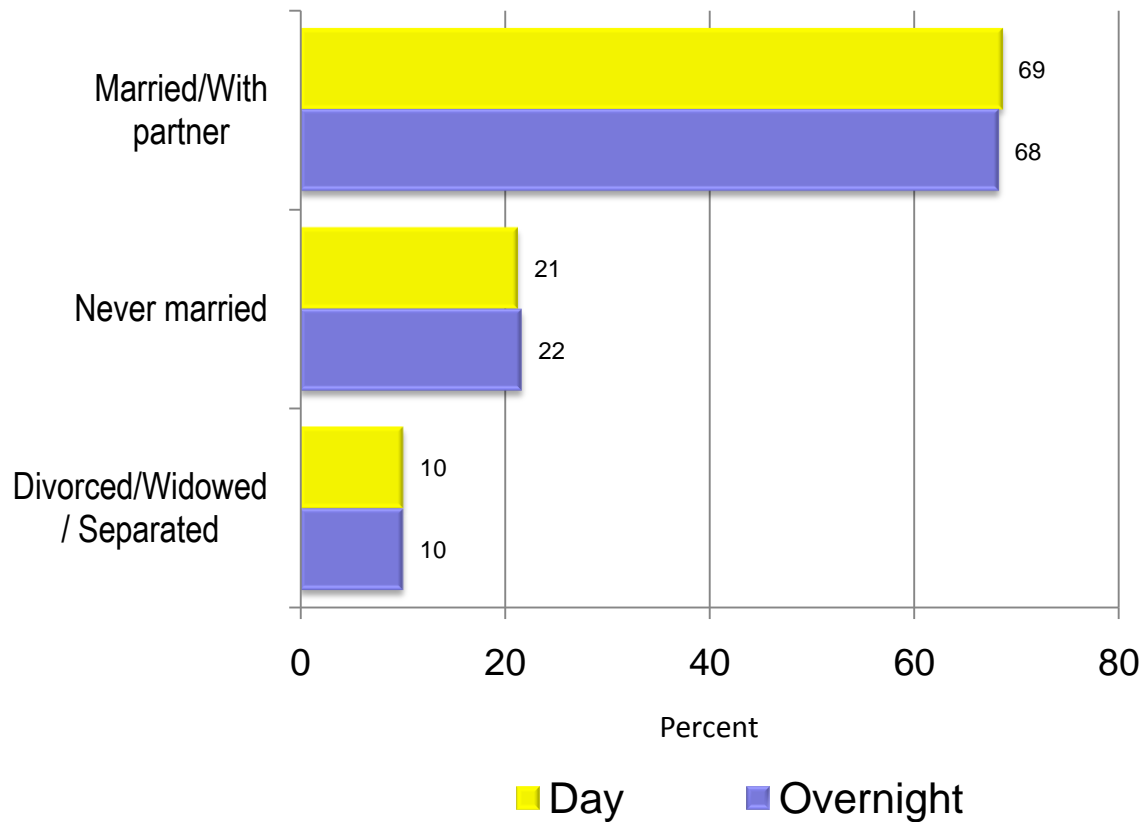
Base: Marketable Trips



Marital Status



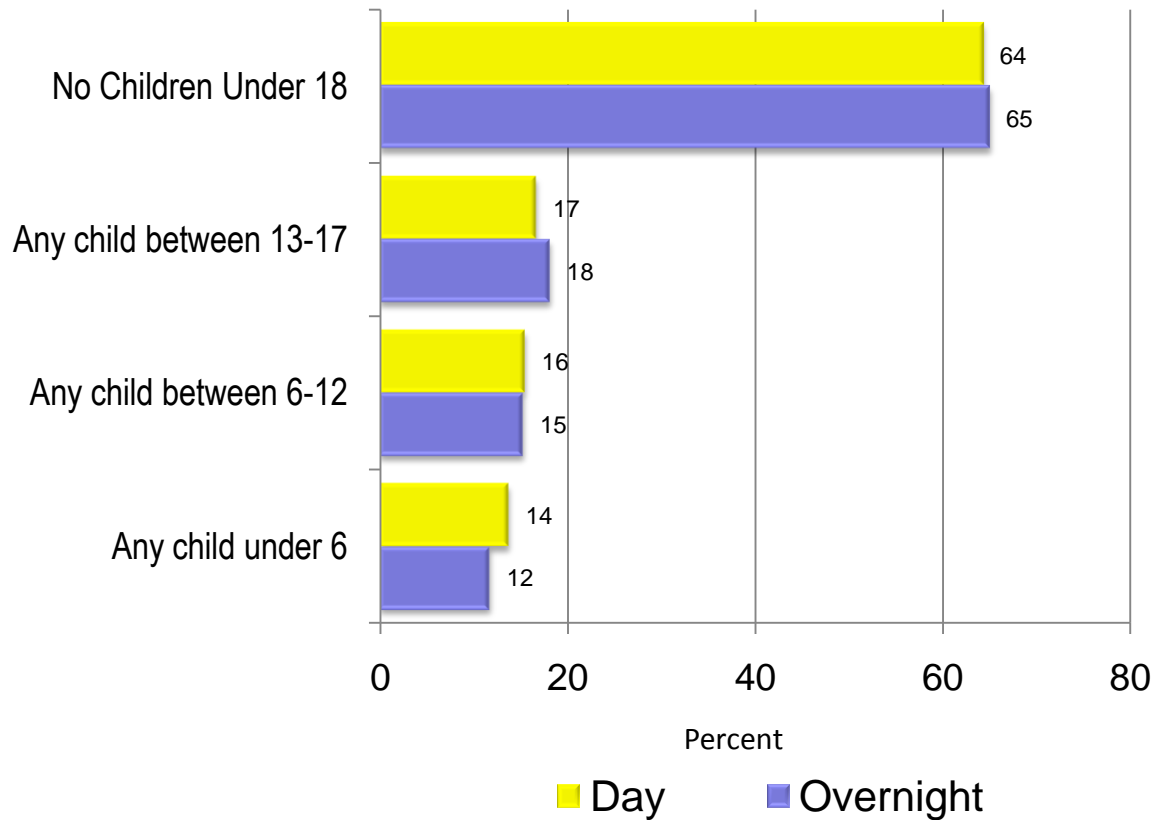
Base: Marketable Trips



Children in Household



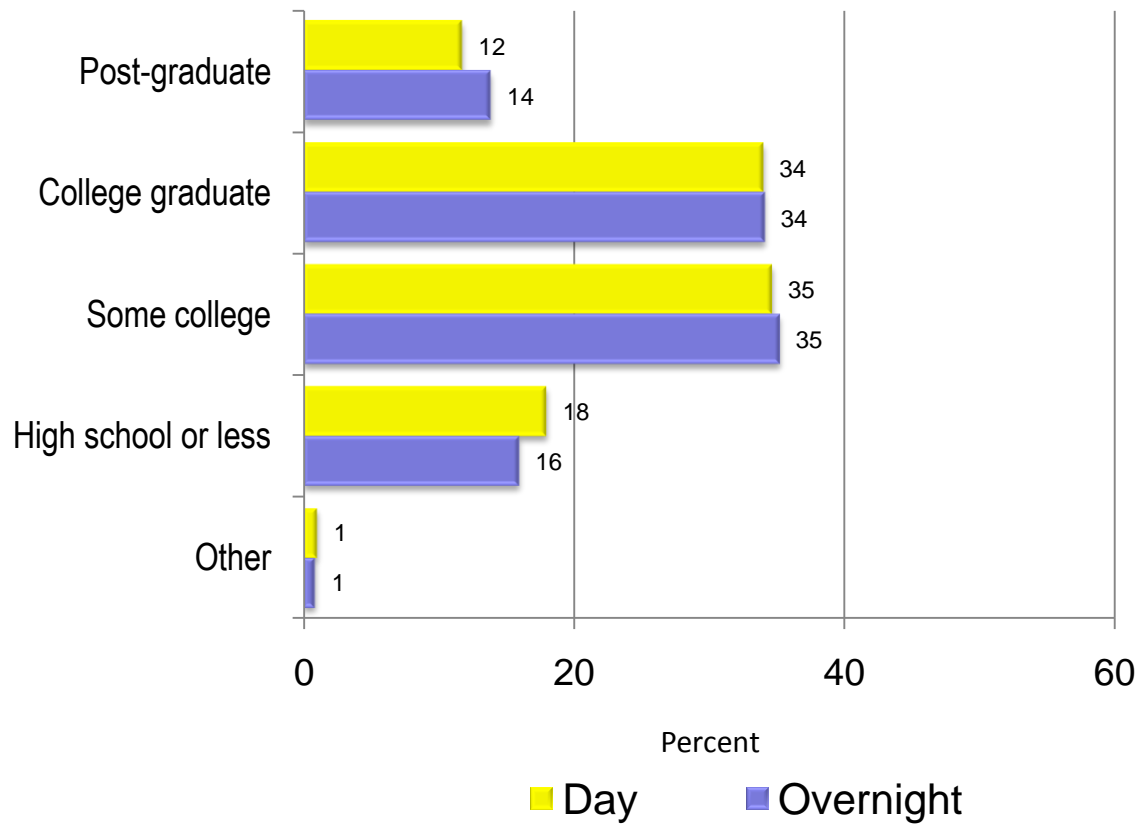
Base: Marketable Trips



Education



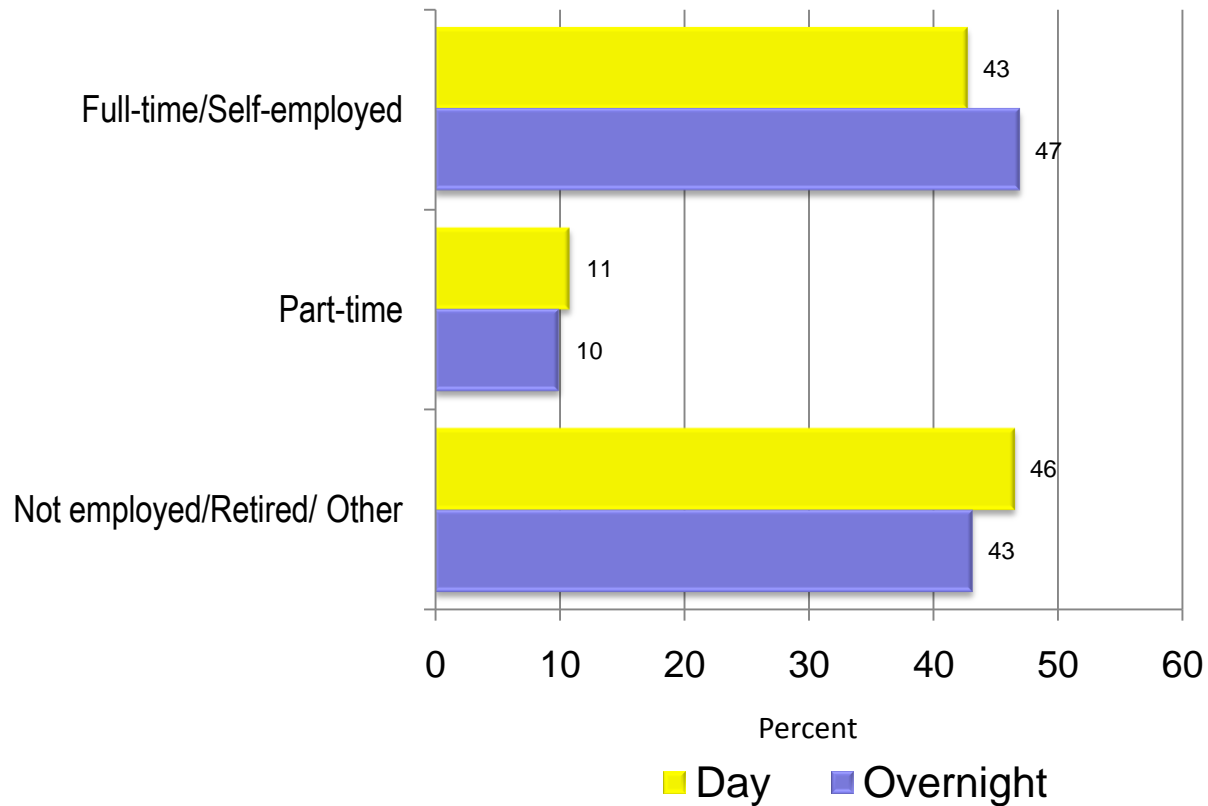
Base: Marketable Trips



Employment



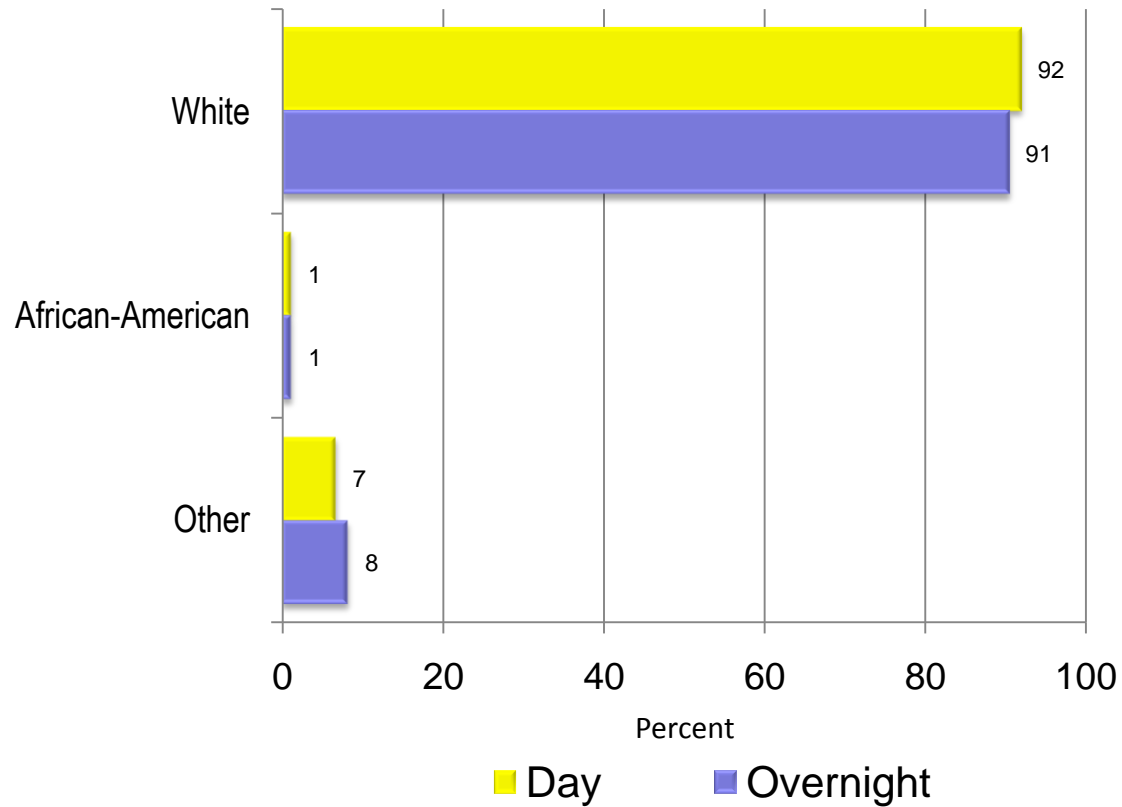
Base: Marketable Trips



Race



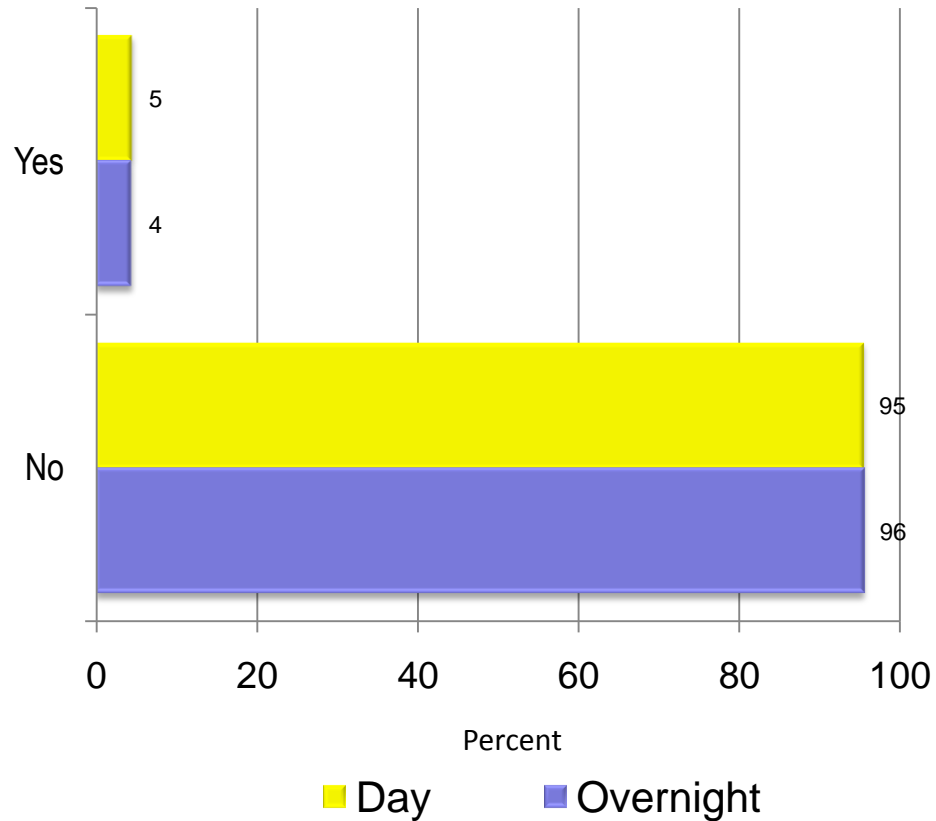
Base: Marketable Trips



Hispanic Background



Base: Marketable Trips





Appendix A: Key Terms Defined

Key Terms Defined



- ◉ An **Overnight Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.
- ◉ A **Day Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.

Trip-Type Segments



Total Trips = Leisure + Business + Business-Leisure

- **Leisure Trips:** includes all trips where the main purpose was one of the following:
 - *Visiting friends/relatives*
 - *Touring through a region to experience its scenic beauty, history and culture*
 - *Outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating*
 - *Special event, such as a fair, festival, or sports event*
 - *City trip*
 - *Cruise*
 - *Casino*
 - *Theme park*
 - *Resort (ocean beach, inland or mountain resort)*
 - *Skiing/snowboarding*
- **Business Trips:** includes
 - *Conference/convention*
 - *Other business trip*
- **Business-Leisure:** a trip for business where, on the same trip, the visitor stayed for at least one additional day to experience the same place or nearby area simply for leisure.

Marketable Trips:

Includes all leisure trips, with the exception of visits to friends/relatives