



2006 Oregon Overnight Travel Study

*Report
September 2007*

Background



- ◉ Longwoods International was commissioned by the State of Oregon to conduct research into the size and structure of the overnight visitor market for Oregon during the 2006 travel year.
- ◉ This report includes:
 - ◉ *an overview of the U.S. overnight travel market*
 - ◉ *estimates of overnight visitor volumes to Oregon*

Background (Cont'd)



- ◉ The report also provides strategic intelligence on:
 - ◉ *Oregon's key sources of business*
 - ◉ *the Oregon traveler profile*
 - ◉ *trip characteristics*
 - ◉ *trip planning, transportation, accommodations, sports, recreation, sightseeing, entertainment, etc.*
 - ◉ *Oregon's product delivery in terms of over 80 destination attributes*
 - ◉ *a variety of trended information on visitor demographics and trip characteristics*

Methodology



- ◉ **Travel USA®** contacts 200,000 U.S. households annually.
 - ◉ *The households are members of a major consumer mail panel which is balanced statistically to be representative of the U.S. in terms of key demographic characteristics.*

Methodology (Cont'd)



- ◉ Overnight Visitor Research
 - ◉ *To obtain more detail on the Oregon trip, an in-depth follow-up survey was sent to individuals identified in the **Travel USA®** research who had visited Oregon on an overnight trip.*
 - ◉ *Included with the survey was a map of Oregon to help respondents identify the places and regions they had visited.*
 - ◉ *The survey response rate was approximately 60%.*
- ◉ To provide normative data for each wave, parallel surveys were sent to a representative sample of US travelers to collect similar information.

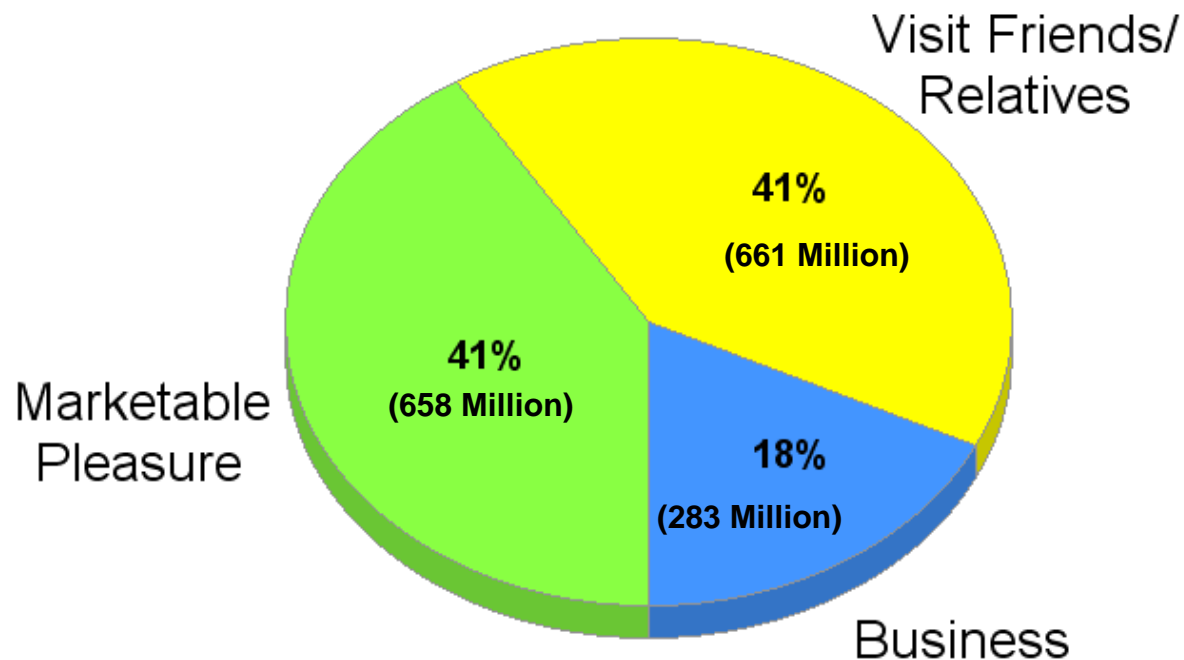
MAIN FINDINGS

Size and Structure of the U.S. Travel Market

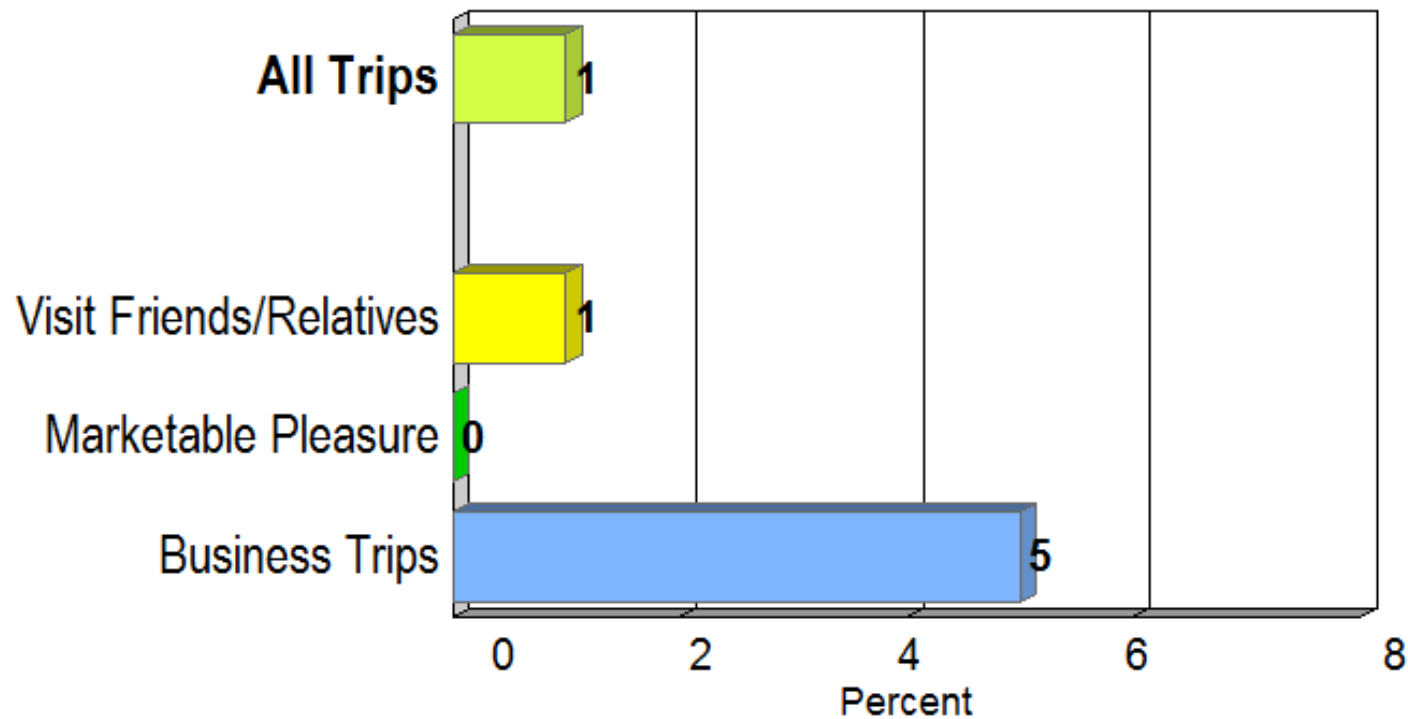
Size of the 2006 U.S. Overnight Travel Market



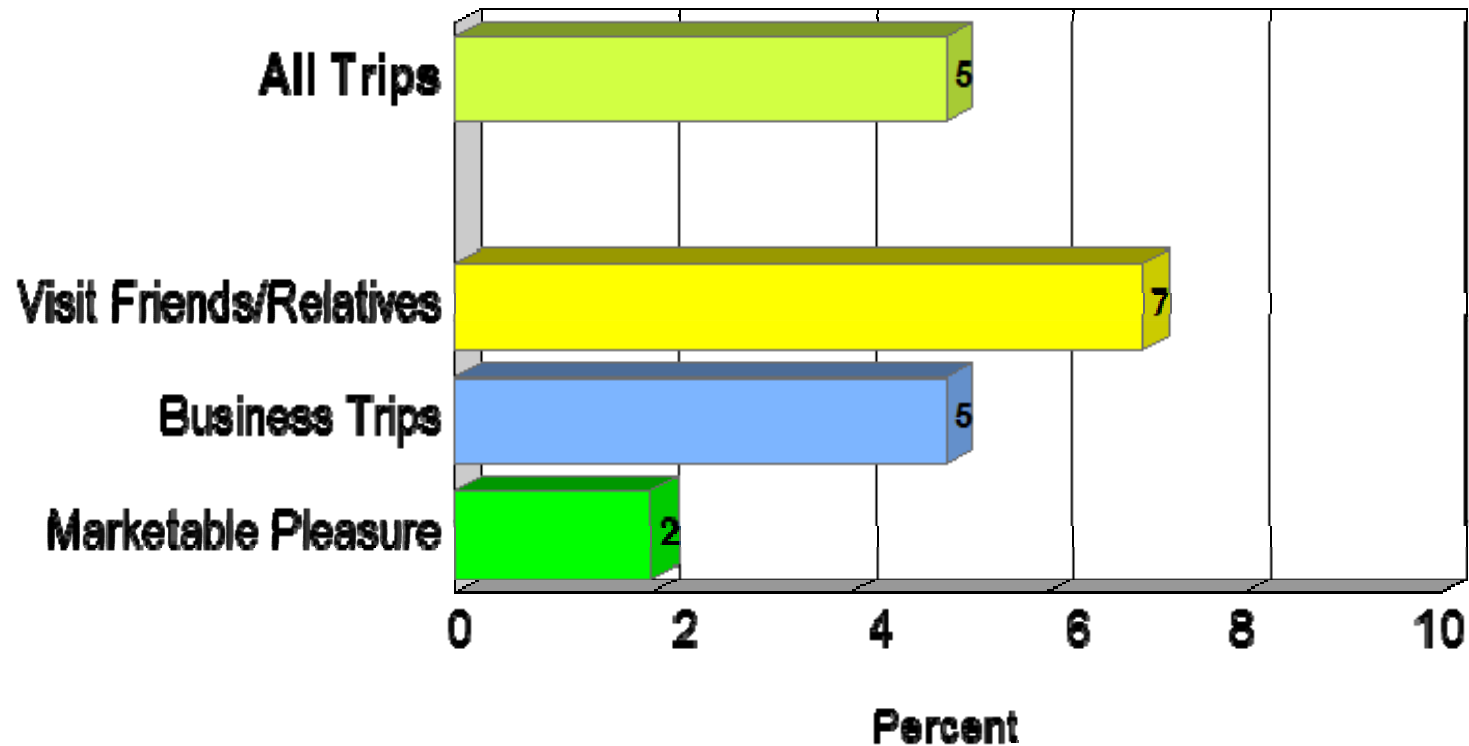
Total = 1.6 Billion



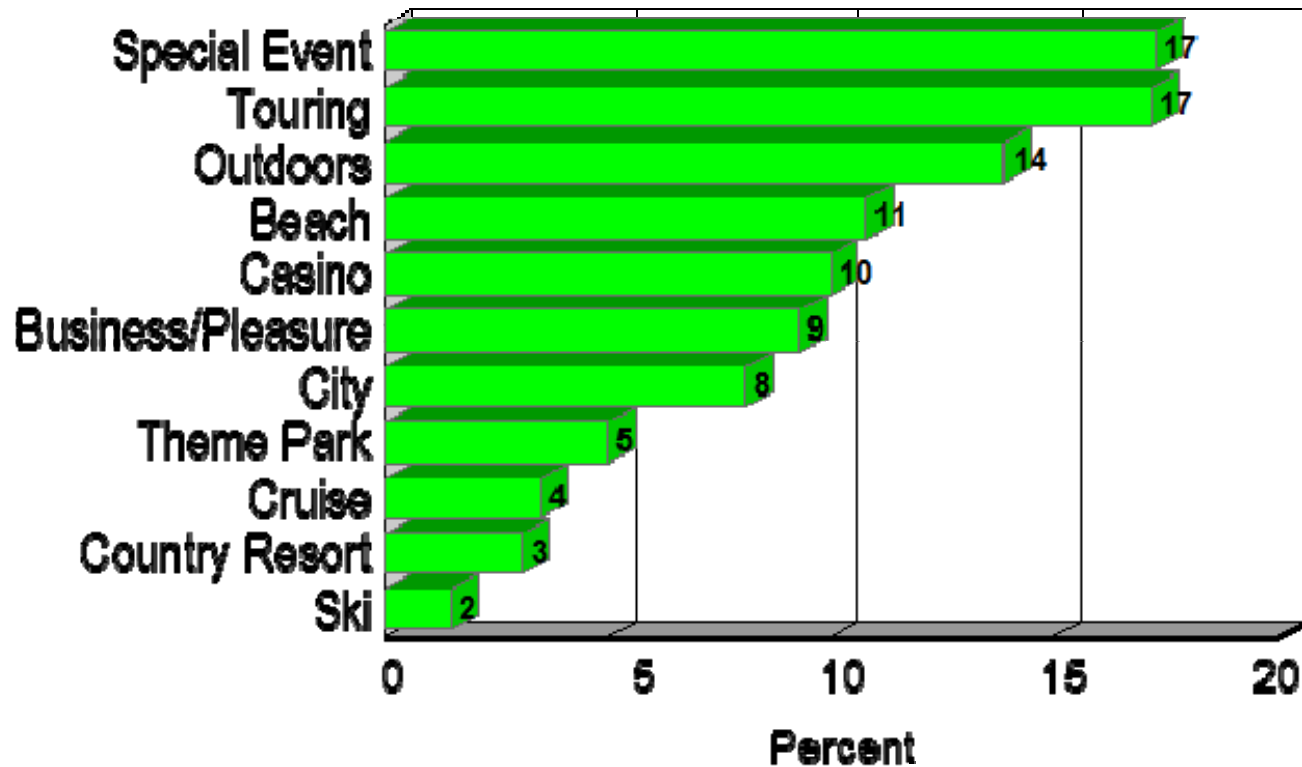
Growth of U.S. Overnight Trips — 2006 vs. 2005



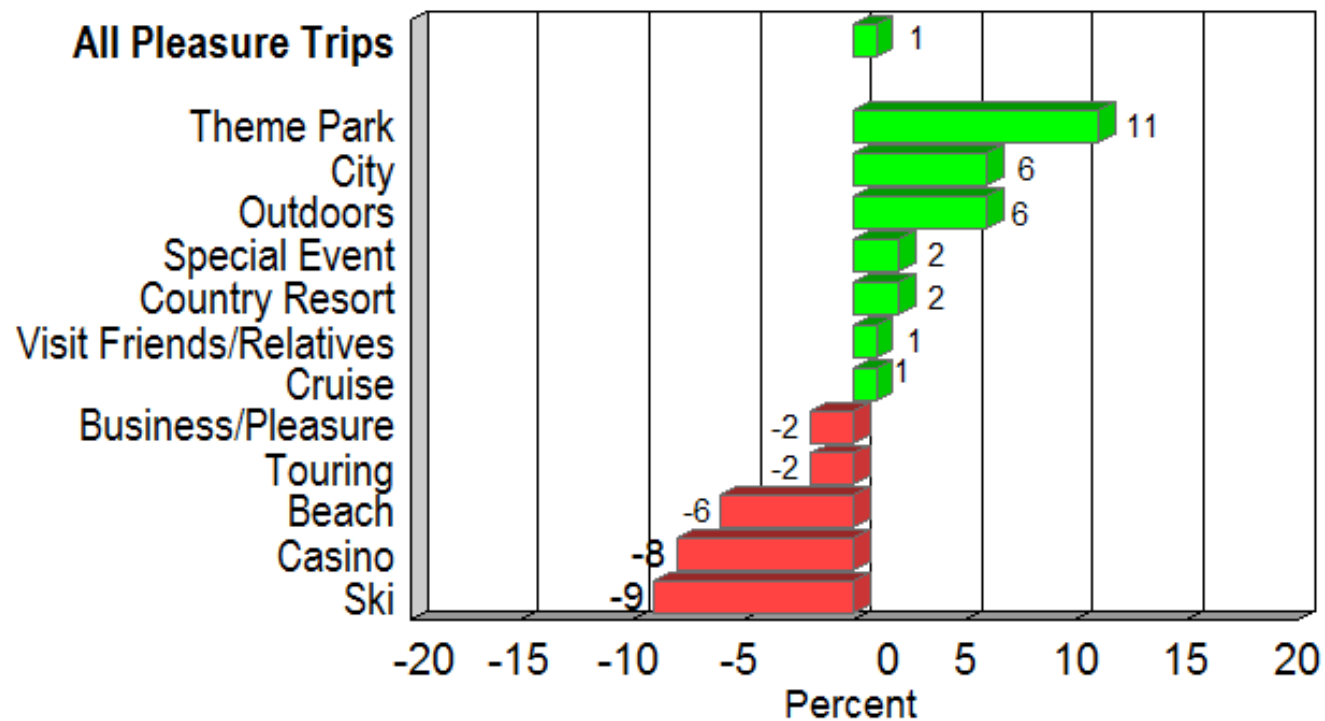
Growth of U.S. Overnight Trips — 2006 vs. 2004



U.S. Overnight Marketable Trip Mix — 2006 Travel Year



U.S. Market Trends — 2006 vs. 2005

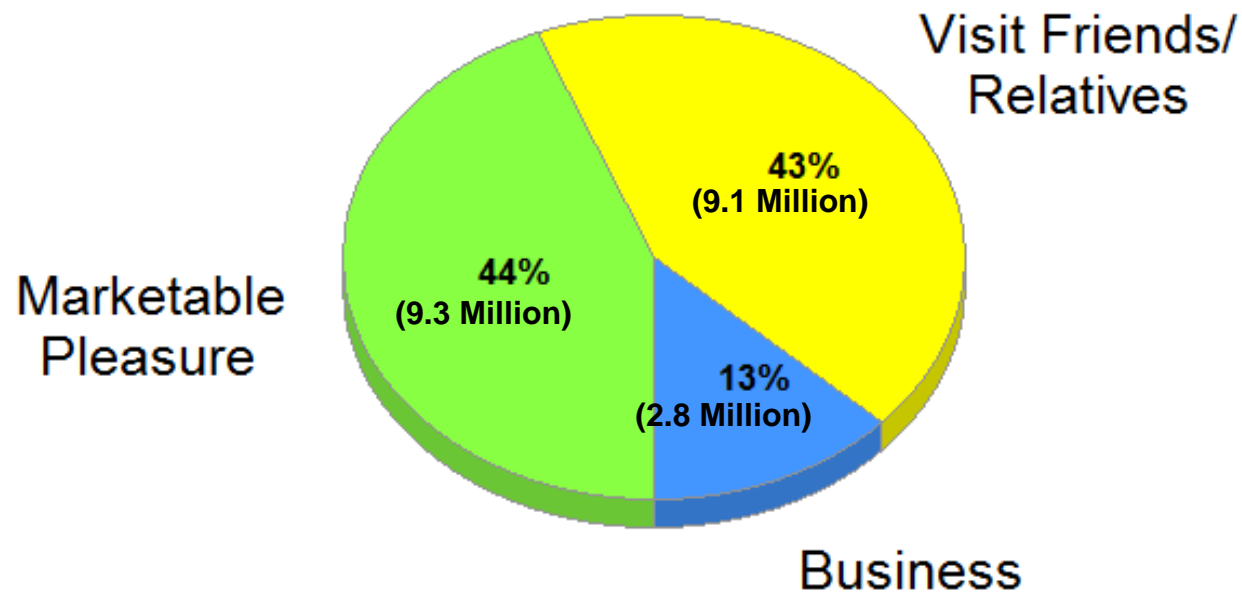


Size and Structure of Oregon's Travel Market

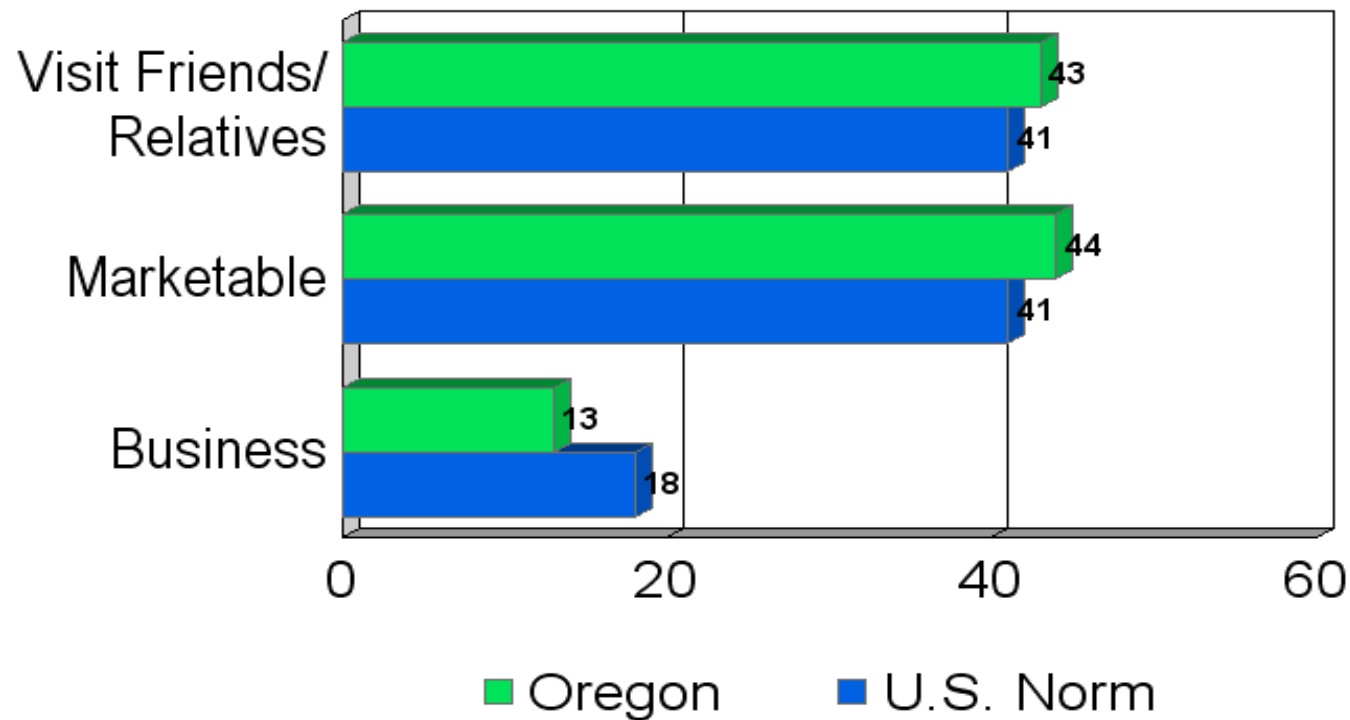
Overnight Trips to Oregon in 2006



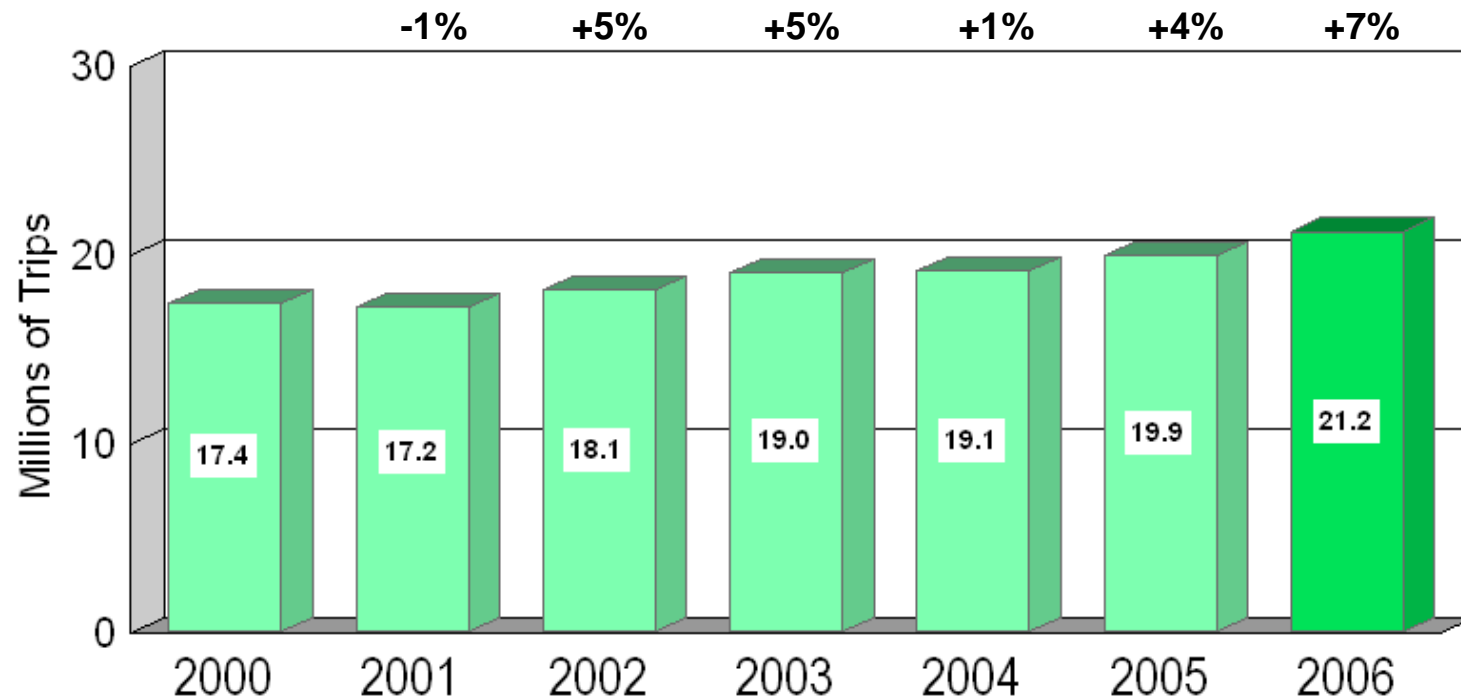
Total = 21.2 Million



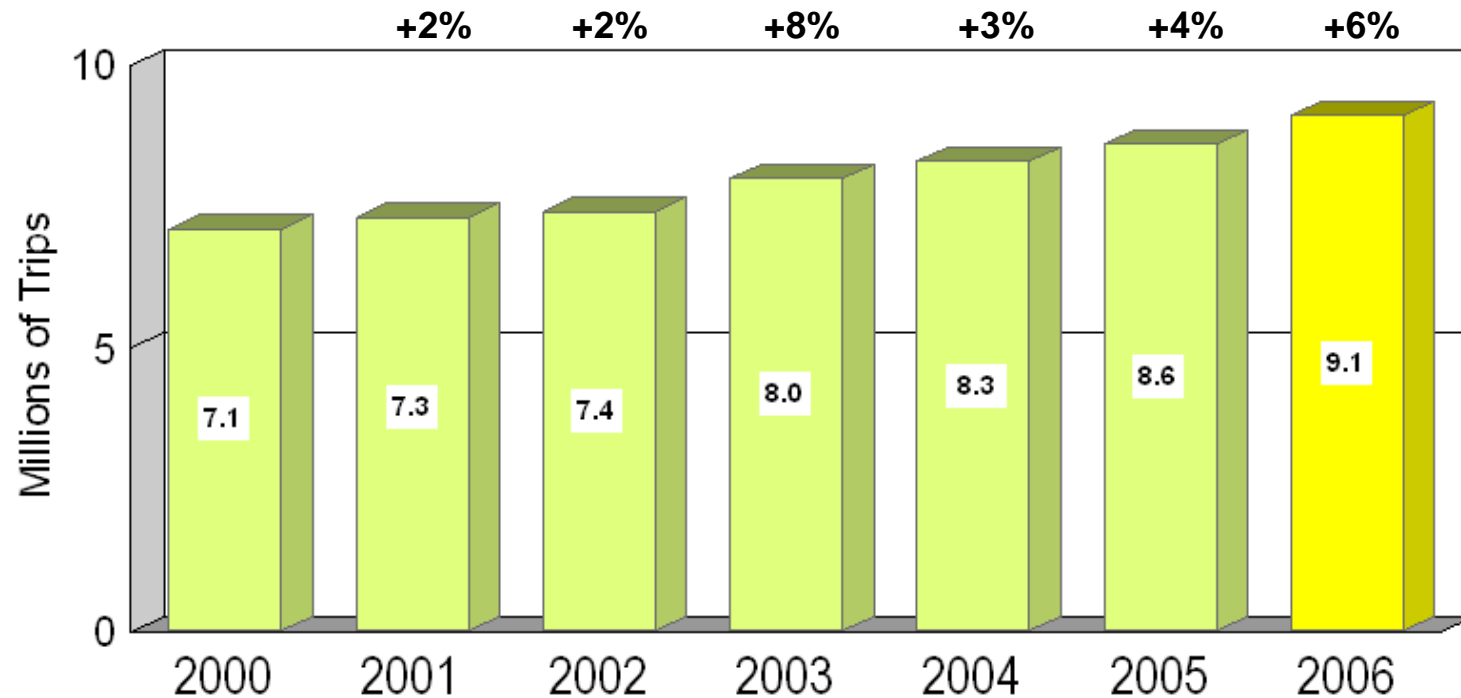
Oregon's 2006 Overnight Trip Segments



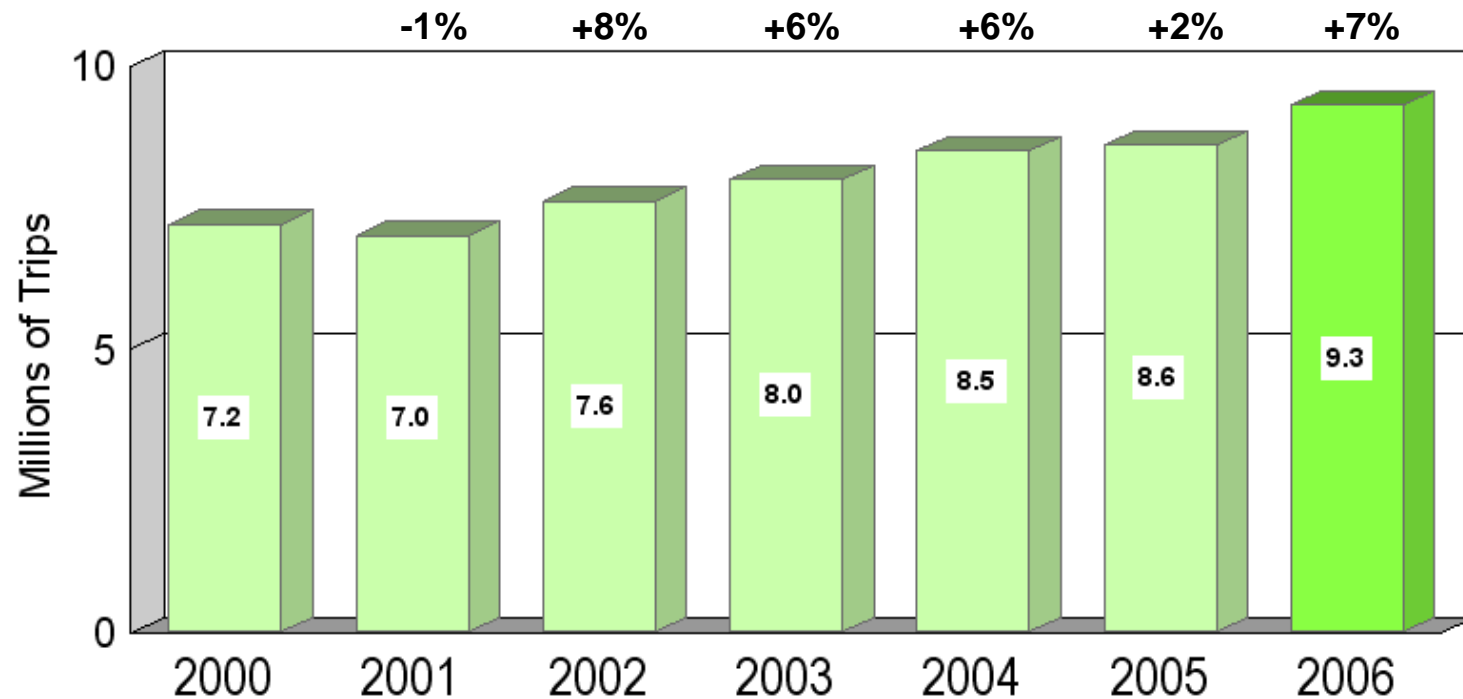
Size of Oregon's Overnight Travel Market



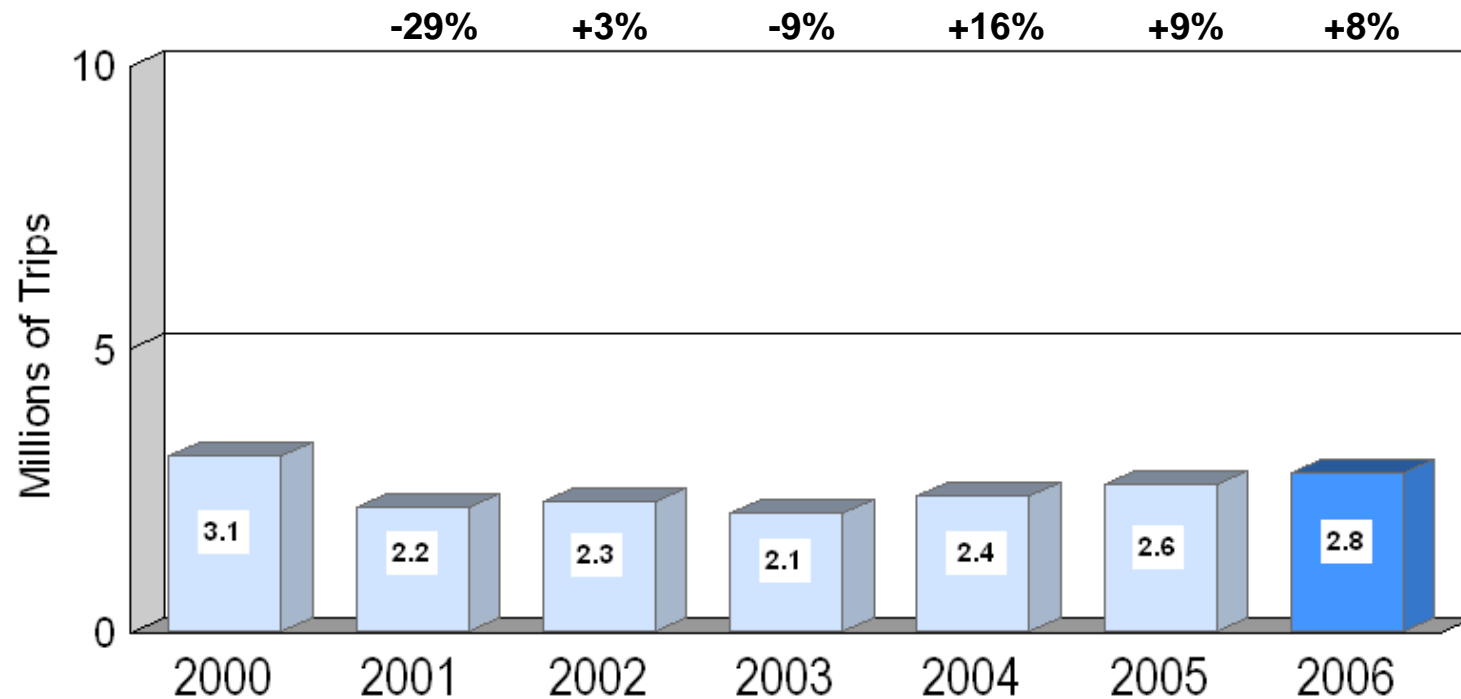
Size of Oregon's VFR Travel Market



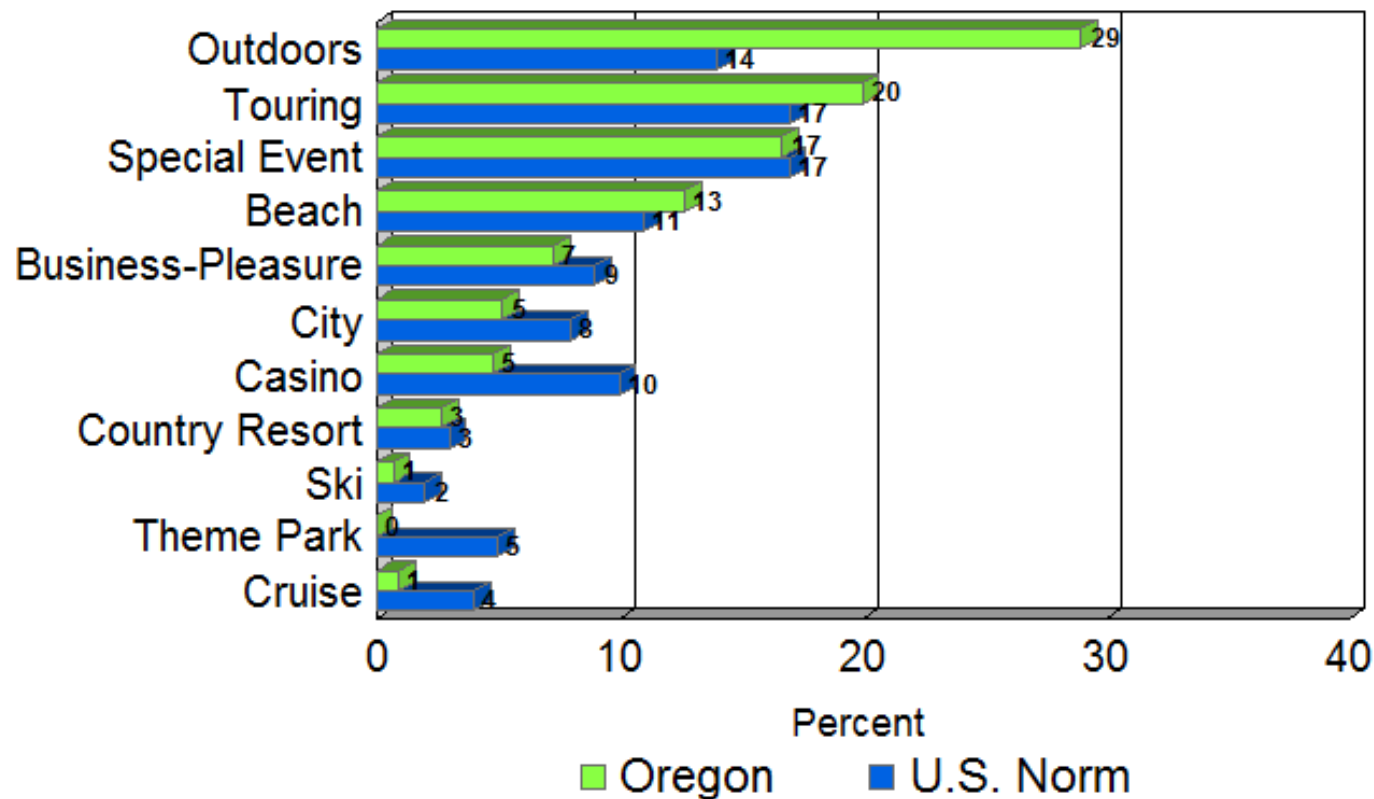
Size of Oregon's Marketable Travel Market



Size of Oregon's Business Travel Market

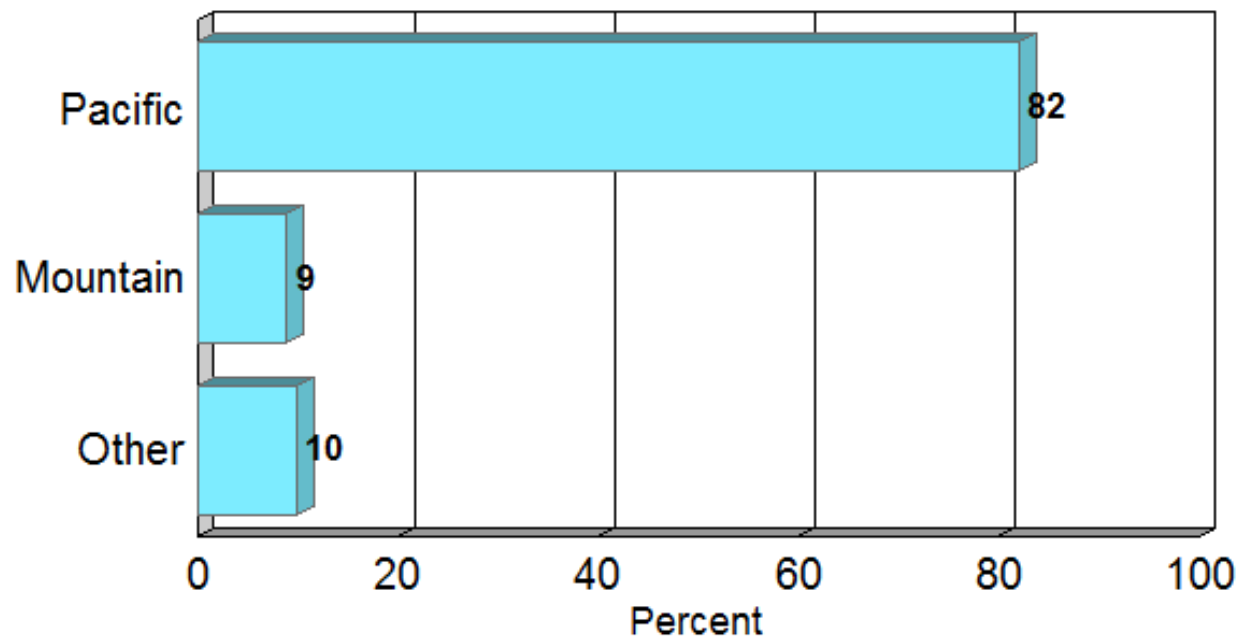


Oregon's 2006 Overnight Marketable Trip Segments

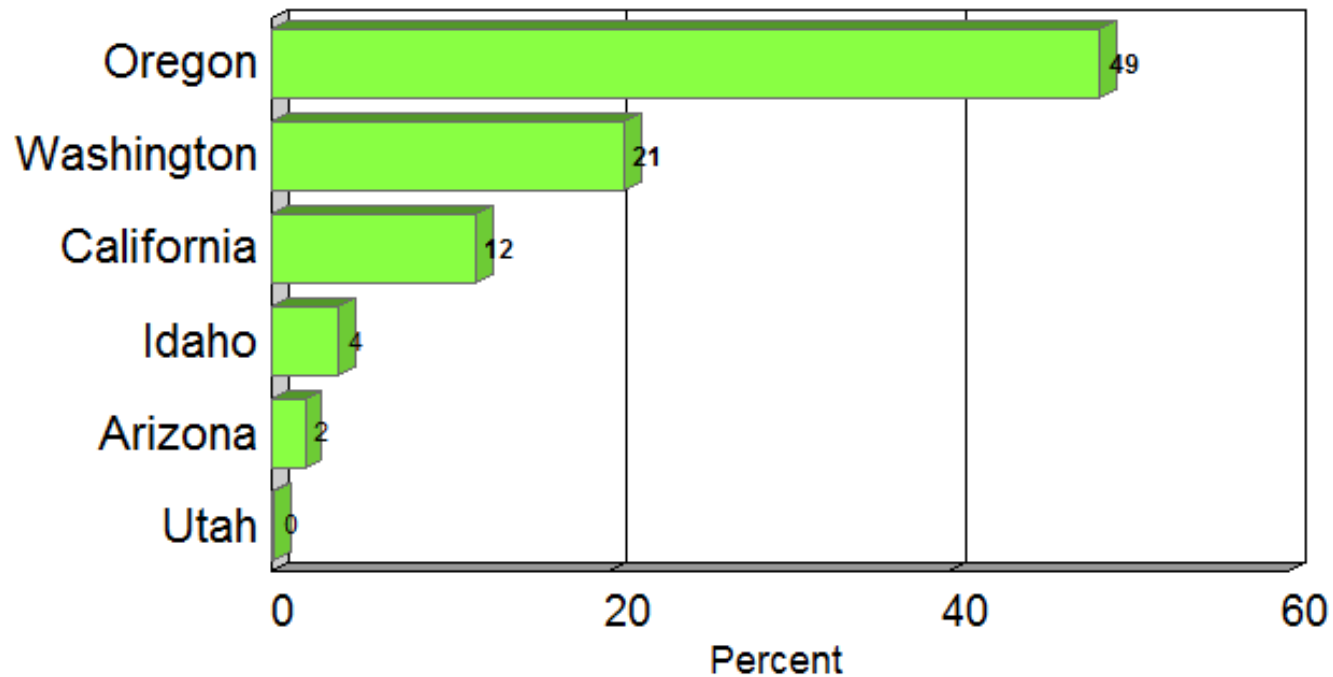


Sources of Business

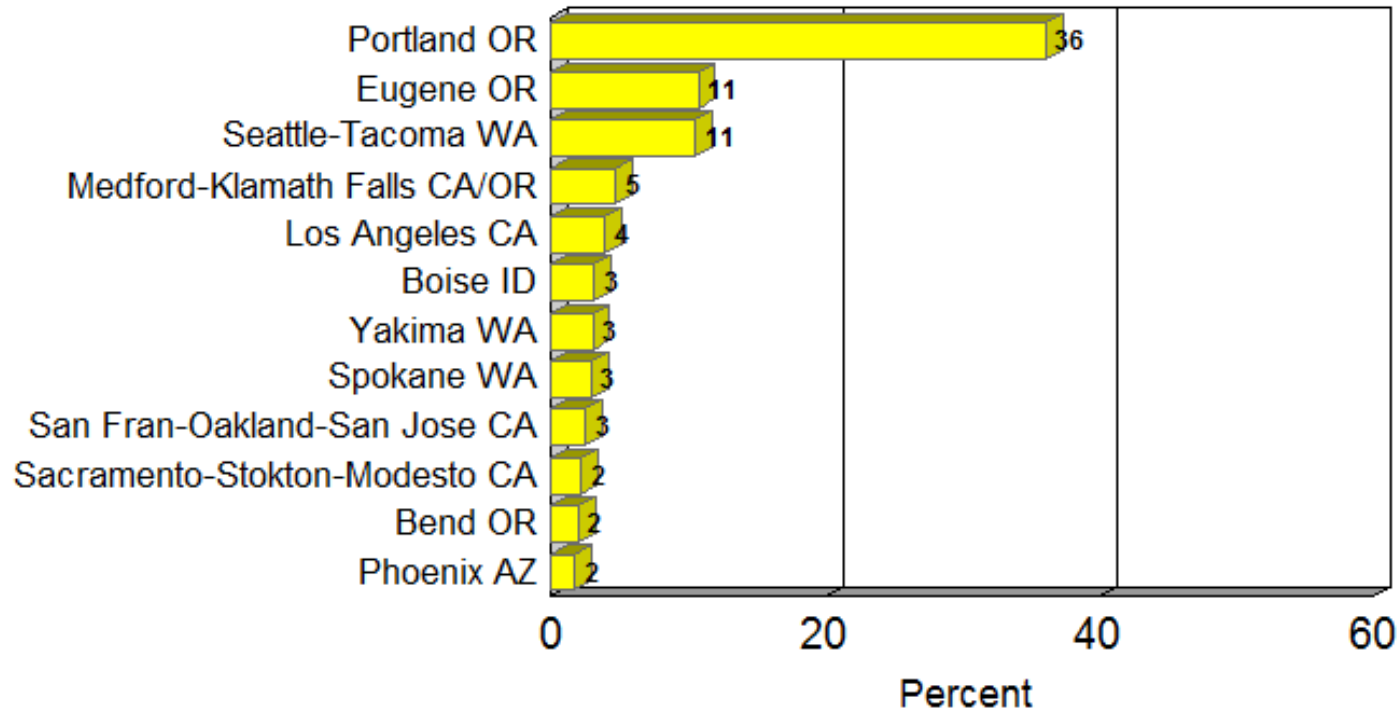
Sources of Business By Region— 2006



State Sources of Business— 2006



Urban Sources of Business— 2006

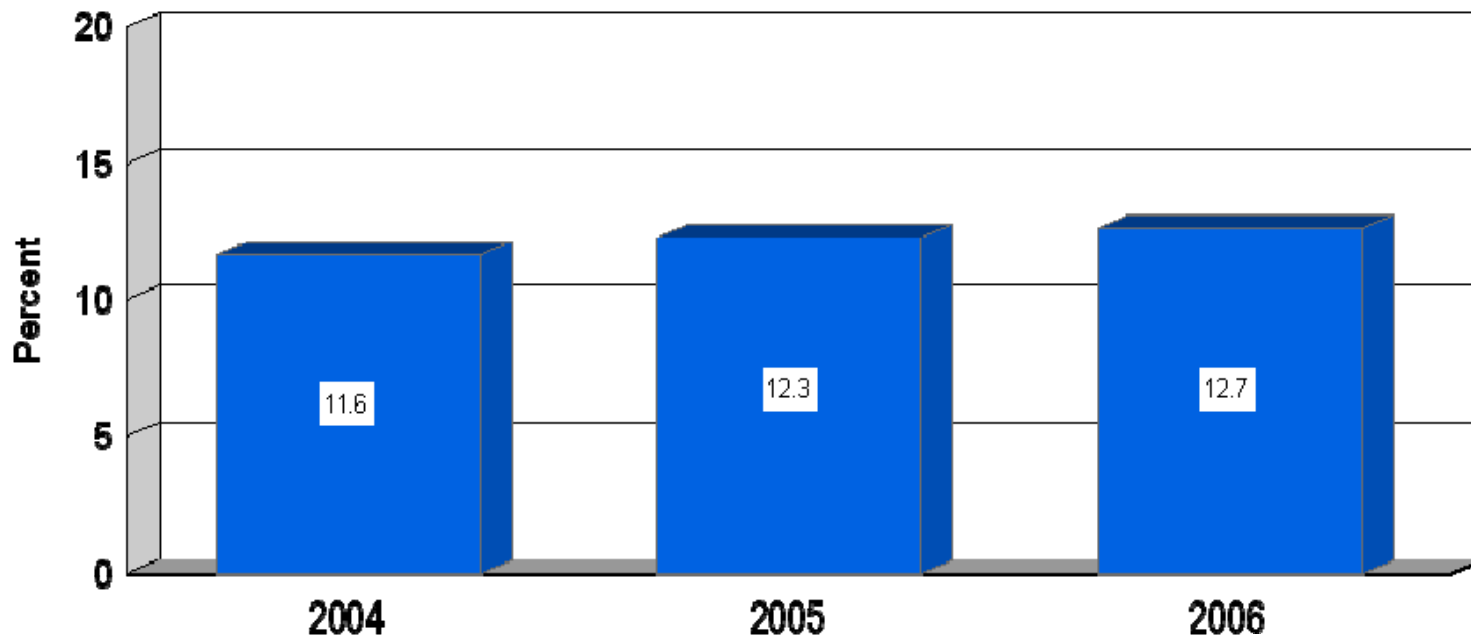


OREGON'S SHARE OF REGIONAL TRIPS

Oregon's Share of Total Overnight Trips Taken by U.S. Residents to the Region



Base: Total Overnight Trips by U.S. Residents to Destinations in the Region

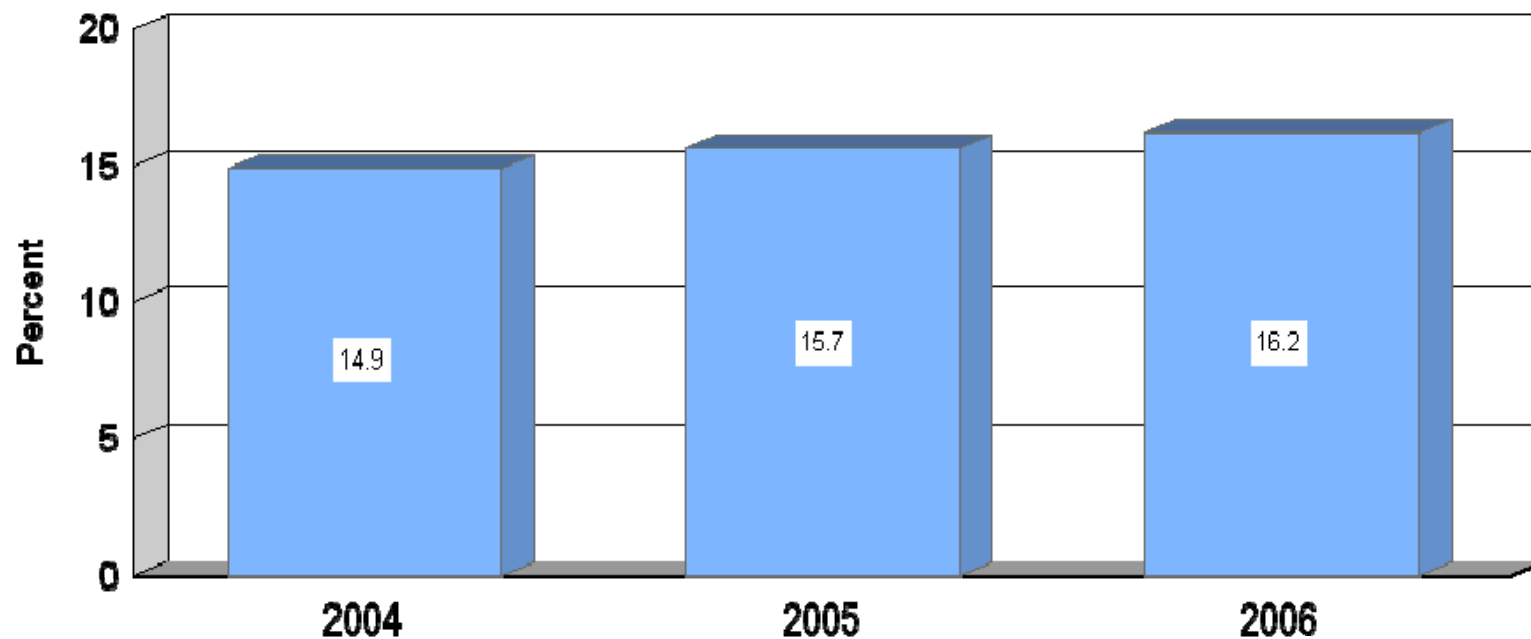


Note: Regional Market includes WA, OR, CA, ID, and NV.

Oregon's Share of Total Overnight Trips Taken by Regional Residents to the Region



Base: Total Overnight Trips by Regional Residents to Destinations in the Region

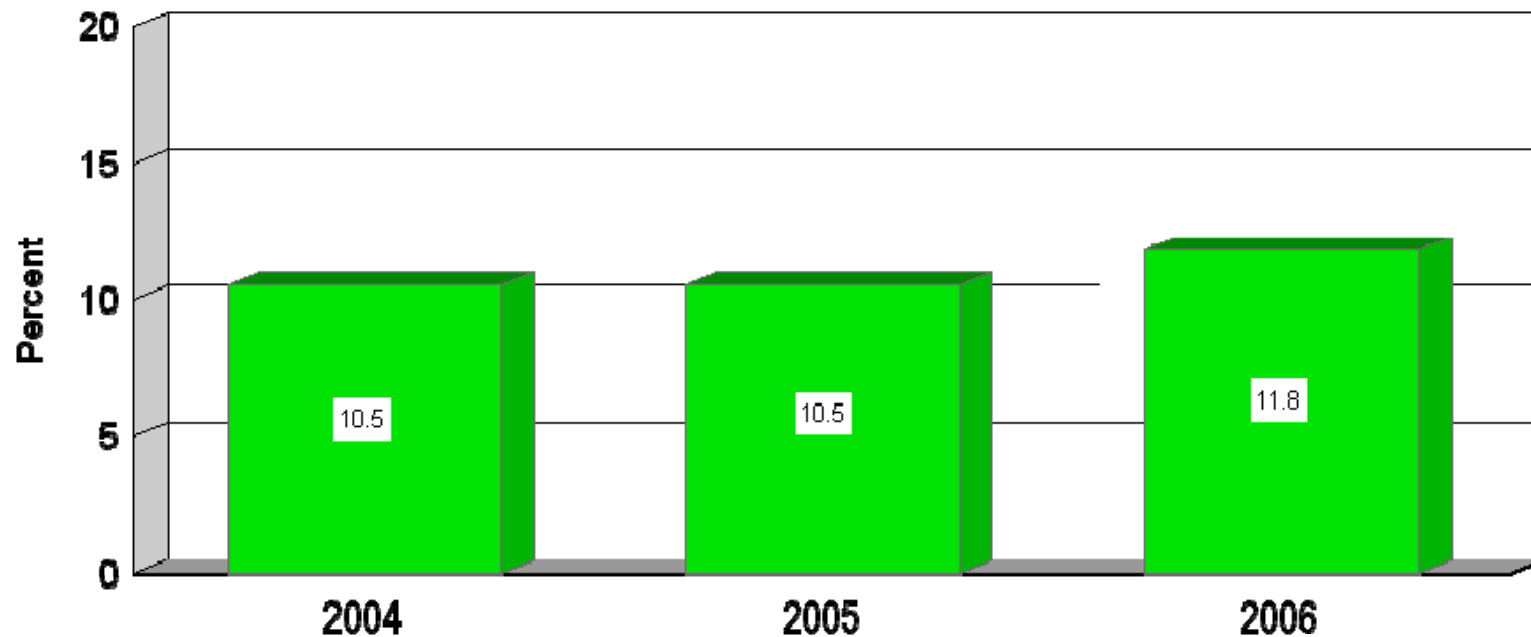


Note: Regional Market includes WA, OR, CA, ID, and NV.

Oregon's Share of Marketable Trips Taken by U.S. Residents to the Region



Base: Overnight Marketable Trips by U.S. Residents to Destinations in the Region



Note: Regional Market includes WA, OR, CA, ID, and NV.

Oregon's Share of Marketable Trips Taken by Regional Residents to the Region



Base: Overnight Marketable Trips by Regional Residents to Destinations in the Region

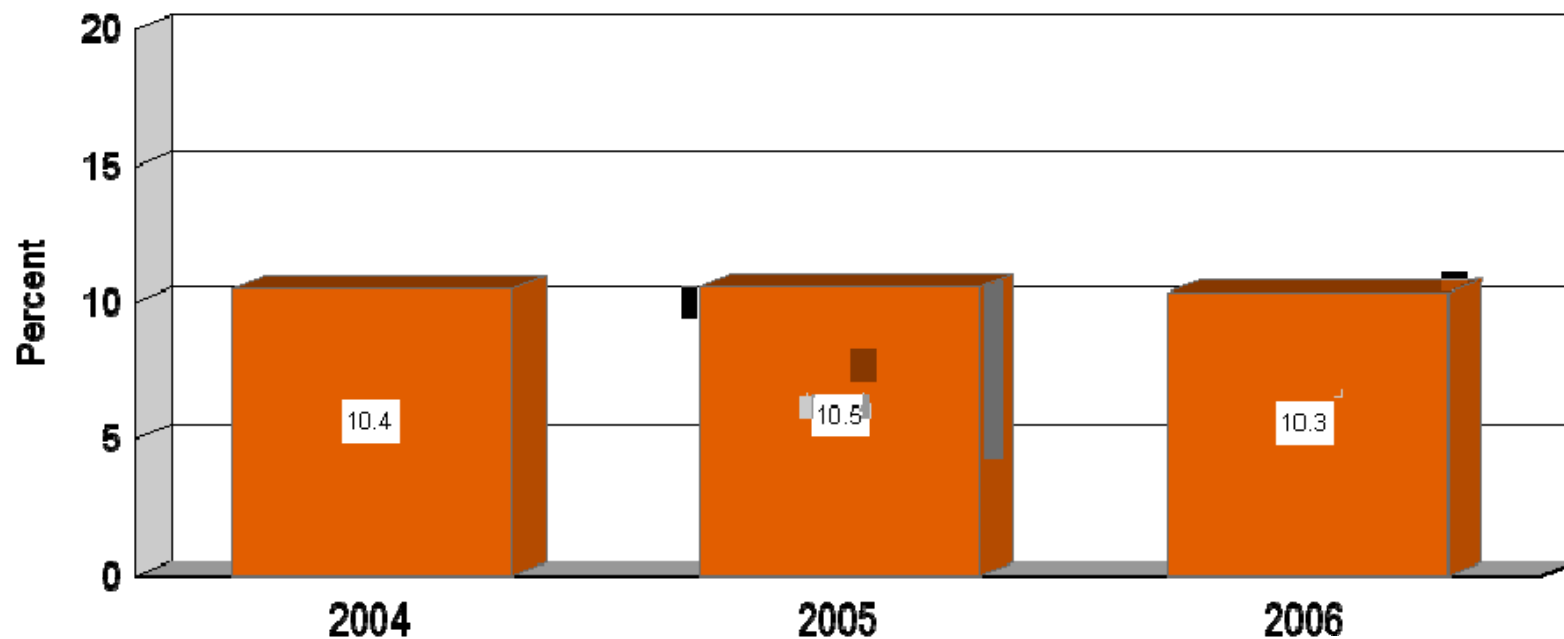


Note: Regional Market includes WA, OR, CA, ID, and NV.

Oregon's Share of Business Trips Taken by U.S. Residents to the Region



Base: Overnight Business Trips by U.S. Residents to Destinations in the Region

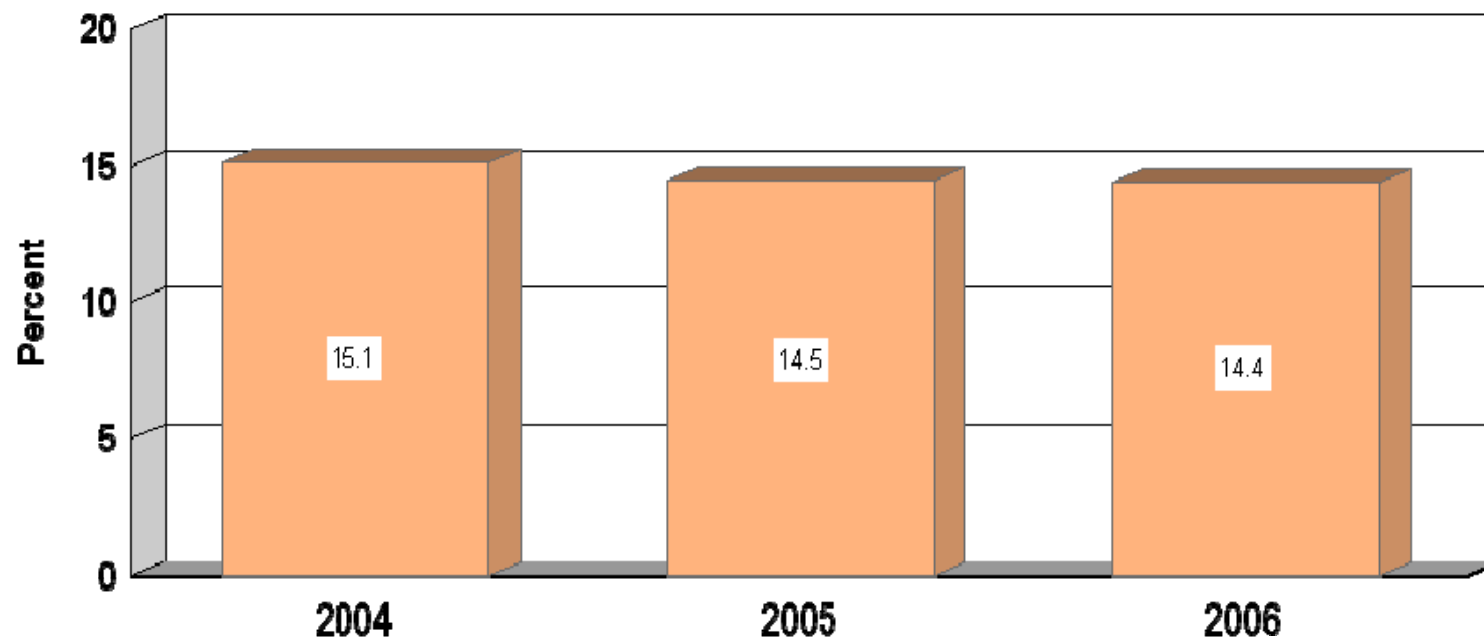


Note: Regional Market includes WA, OR, CA, ID, and NV.

Oregon's Share of Business Trips Taken by Regional Residents to the Region



Base: Overnight Business Trips by Regional Residents to Destinations in the Region



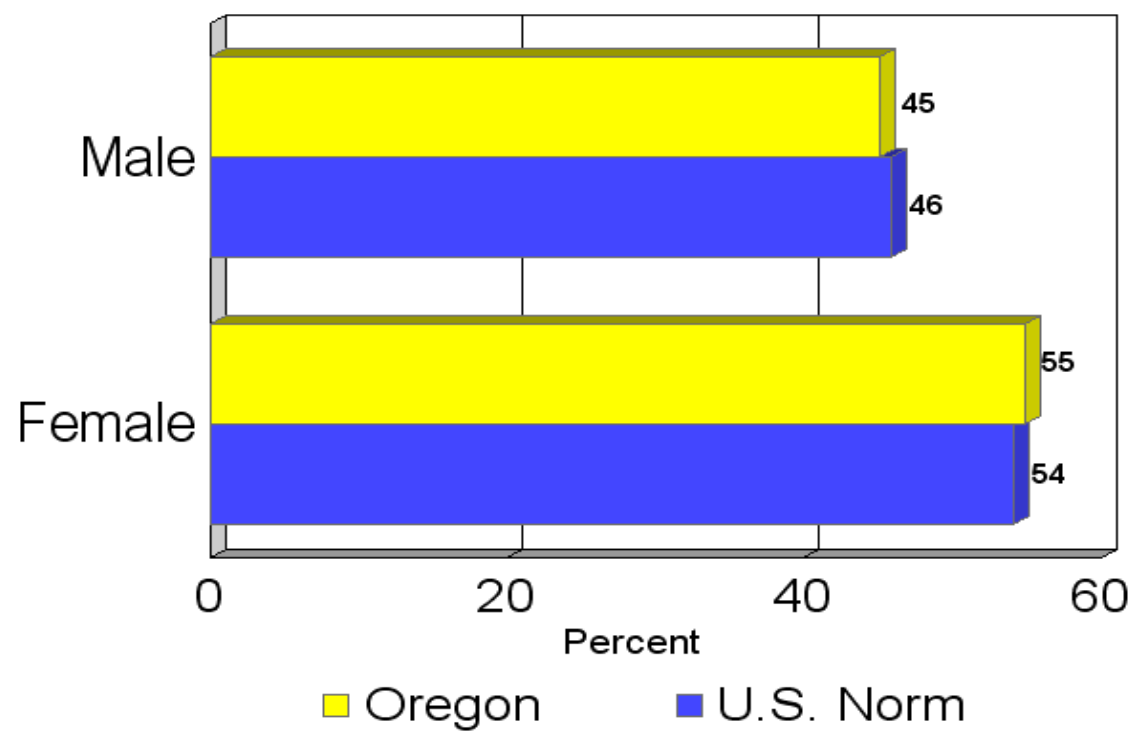
Note: Regional Market includes WA, OR, CA, ID, and NV.

Profile of Overnight Visitors To Oregon

Gender



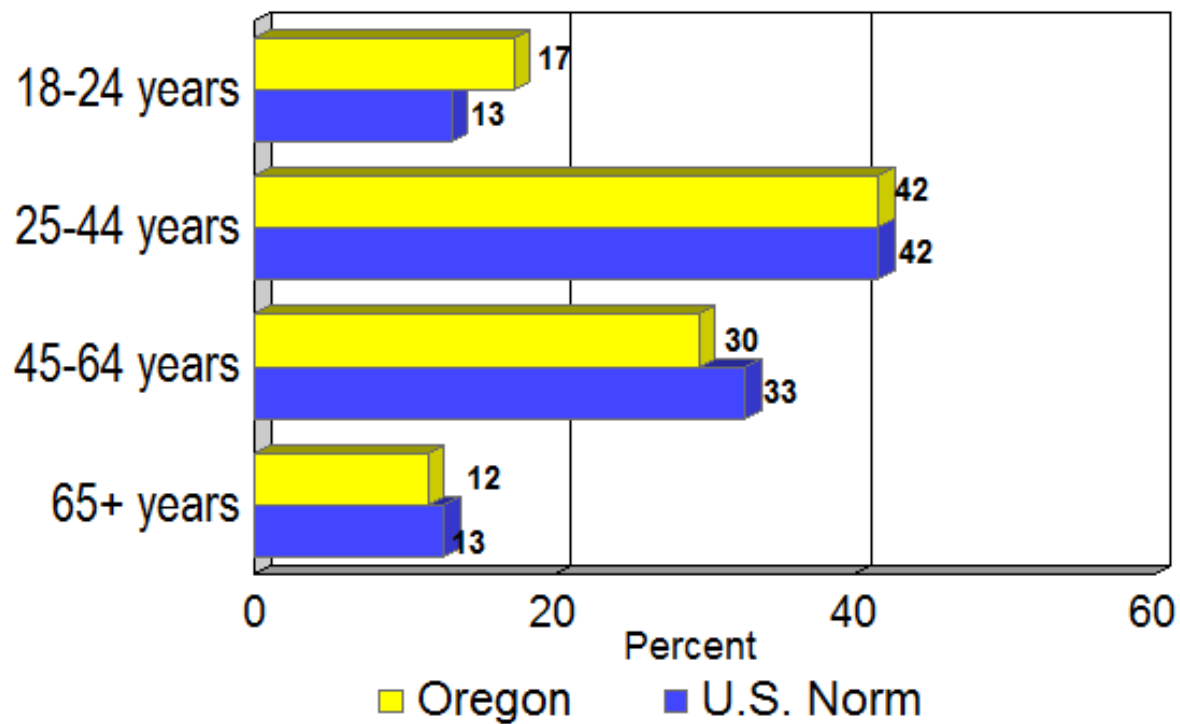
Base: 2006 Overnight Marketable Trips



Age



Base: 2006 Overnight Marketable Trips

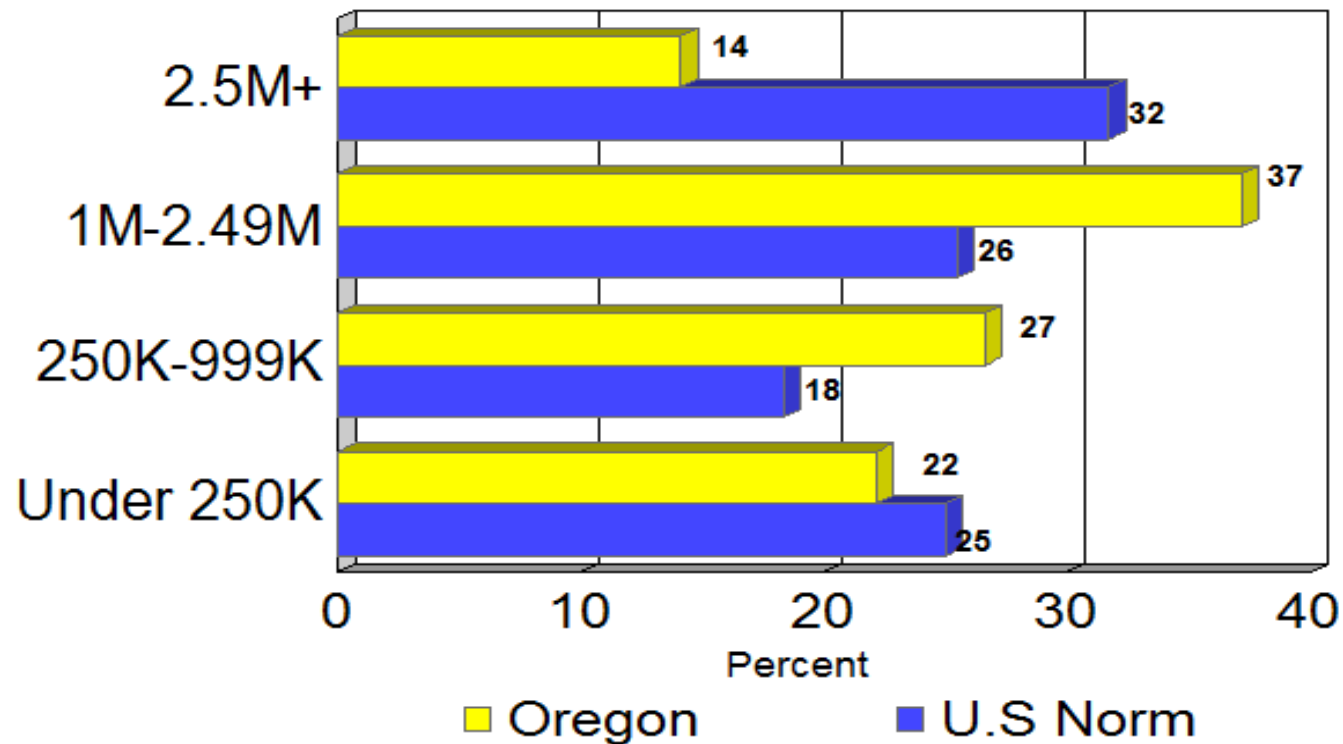


| | <u>Oregon</u> | <u>U.S. Norm</u> |
|-------------|---------------|------------------|
| Average Age | 41.9 | 43.9 |

Community Size



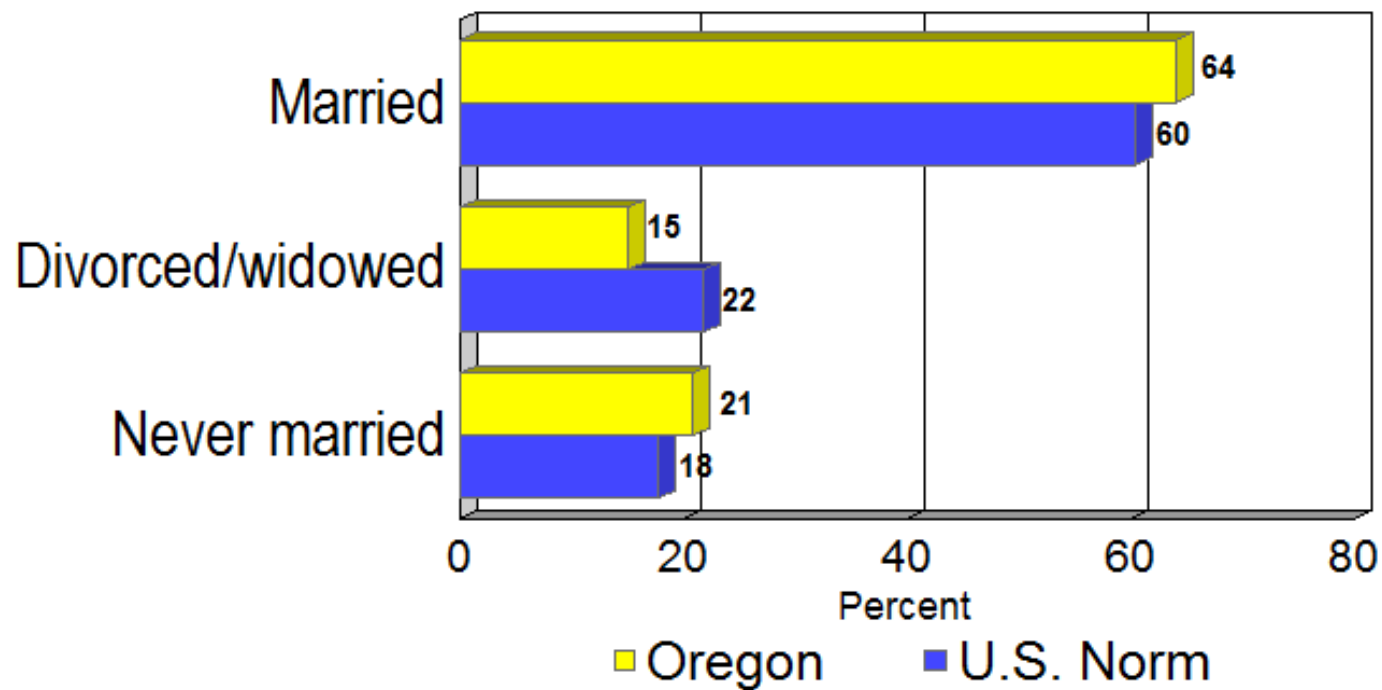
Base: 2006 Overnight Marketable Trips



Marital Status



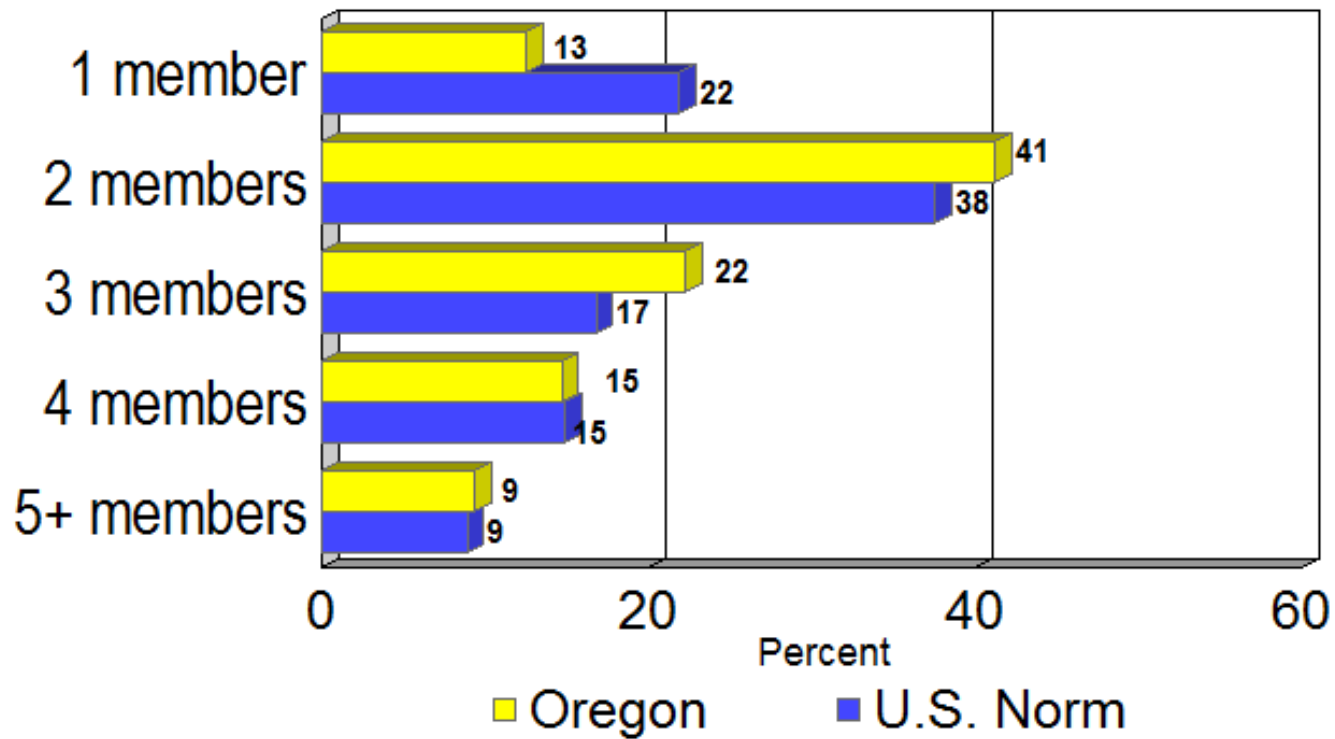
Base: 2006 Overnight Marketable Trips



Household Size



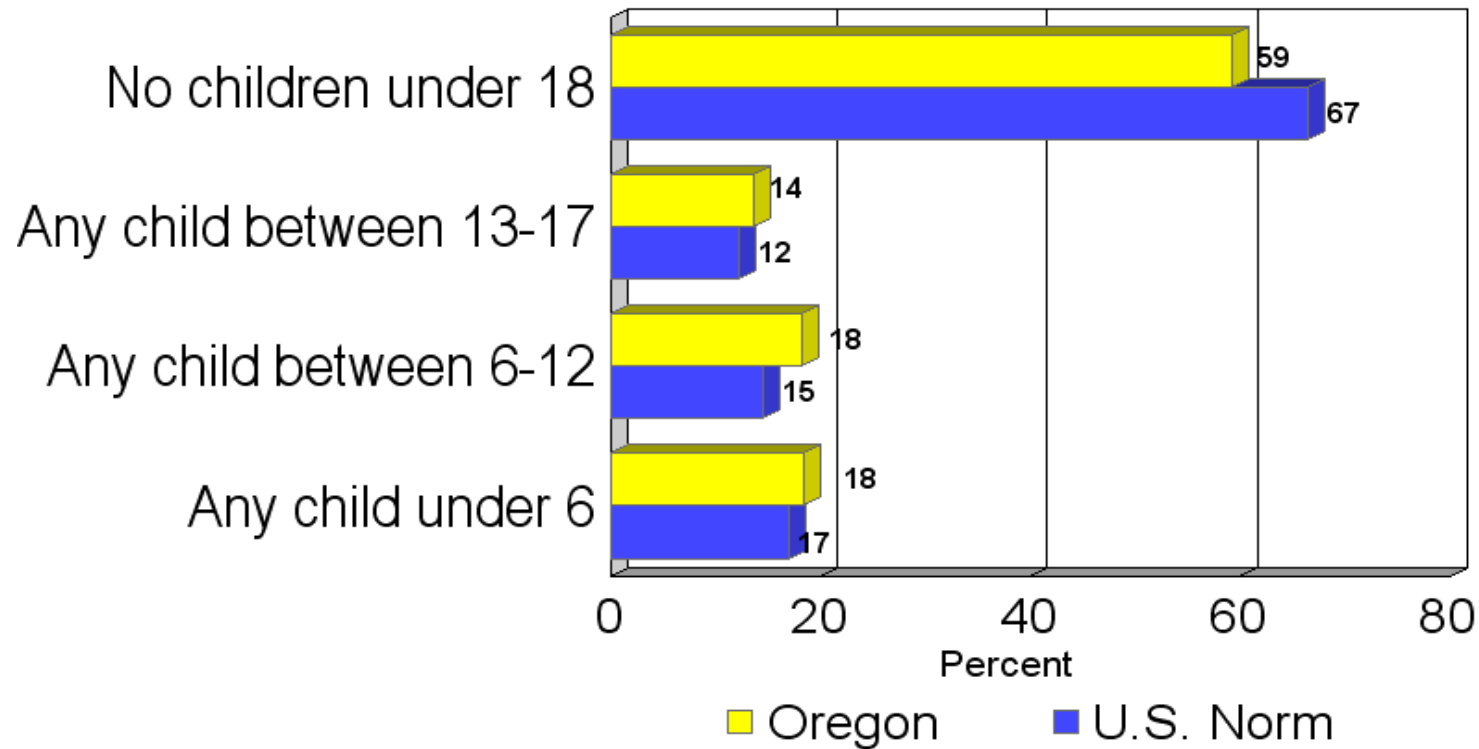
Base: 2006 Overnight Marketable Trips



Children in Household



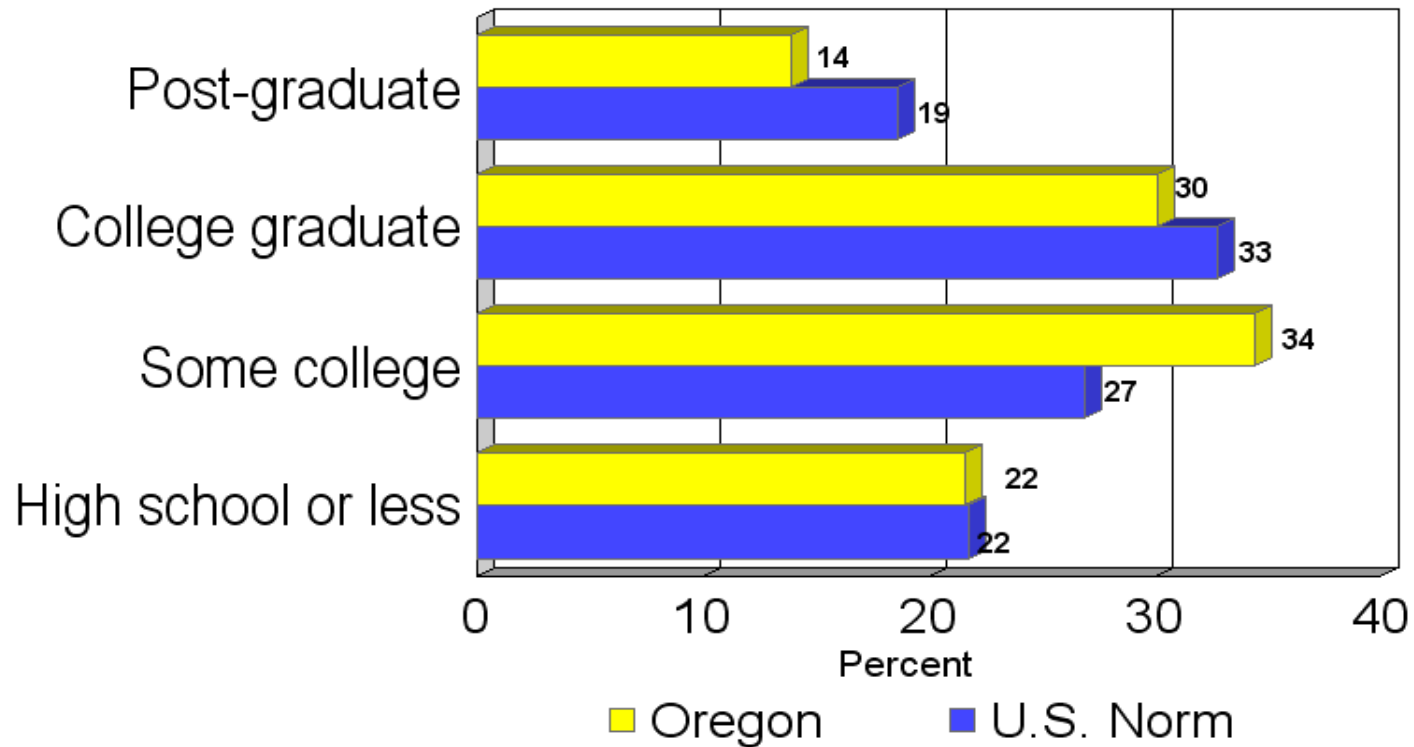
Base: 2006 Overnight Marketable Trips



Education



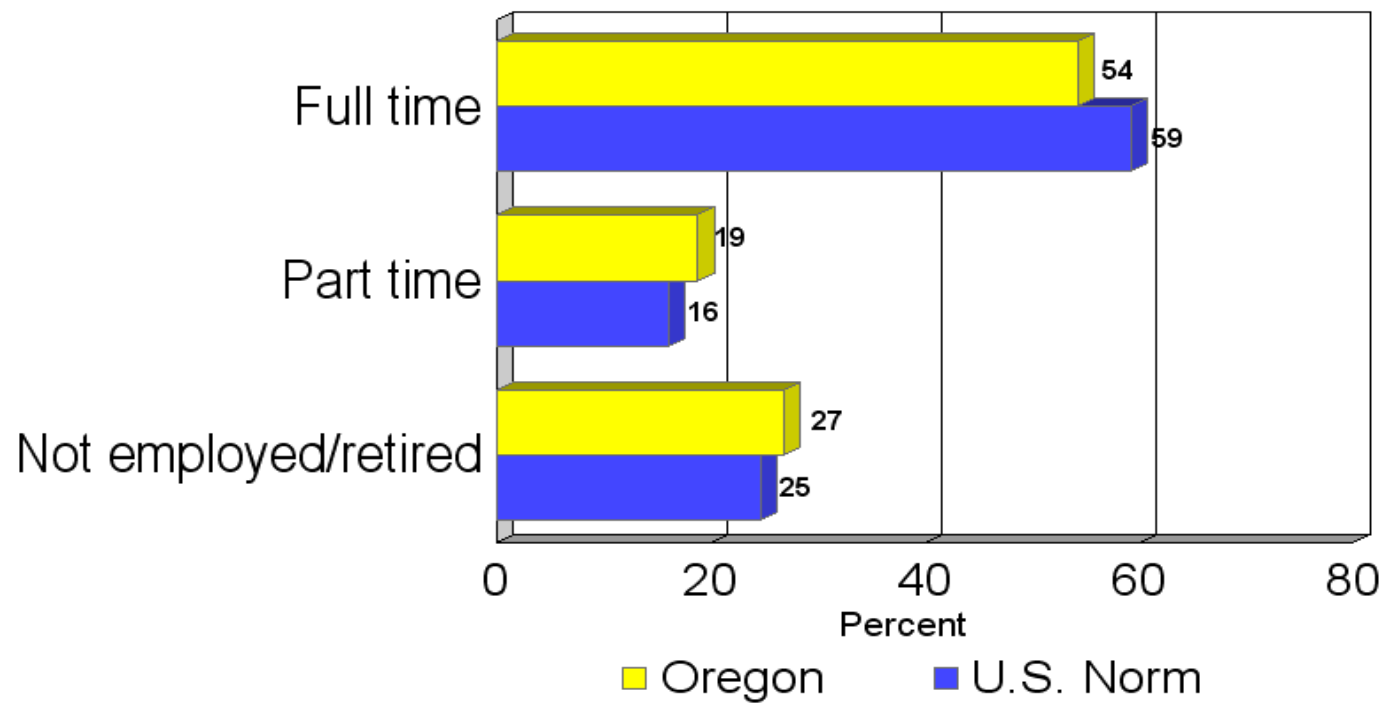
Base: 2006 Overnight Marketable Trips



Employment



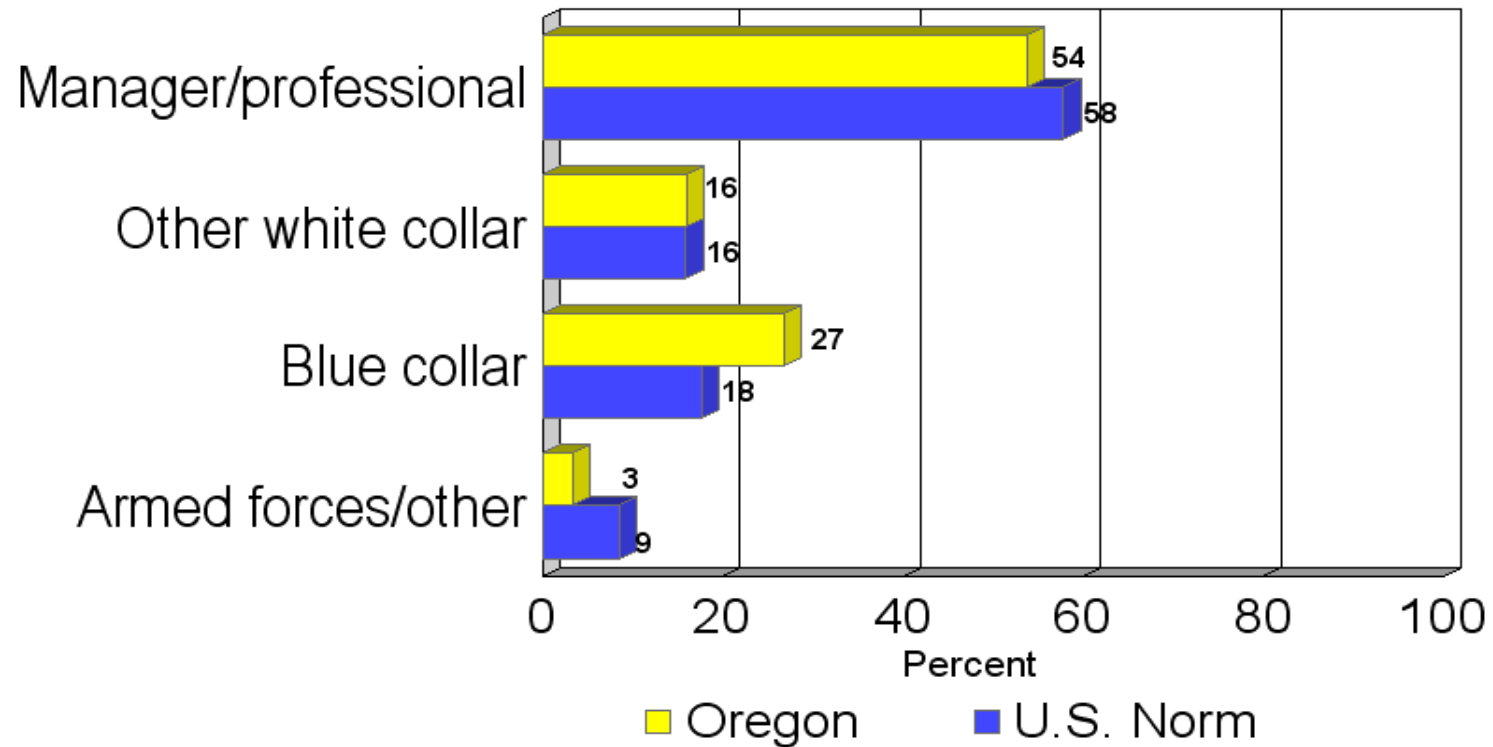
Base: 2006 Overnight Marketable Trips



Occupation



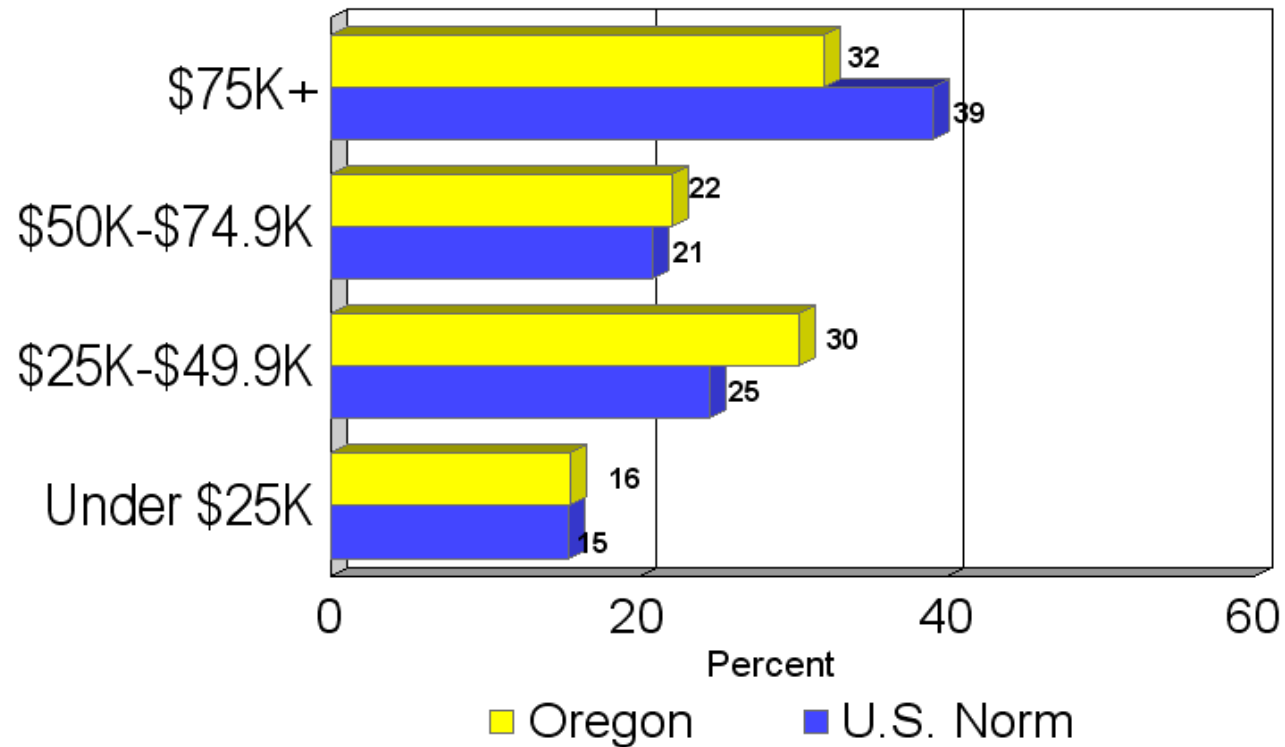
Base: 2006 Overnight Marketable Trips



Income



Base: 2006 Overnight Marketable Trips

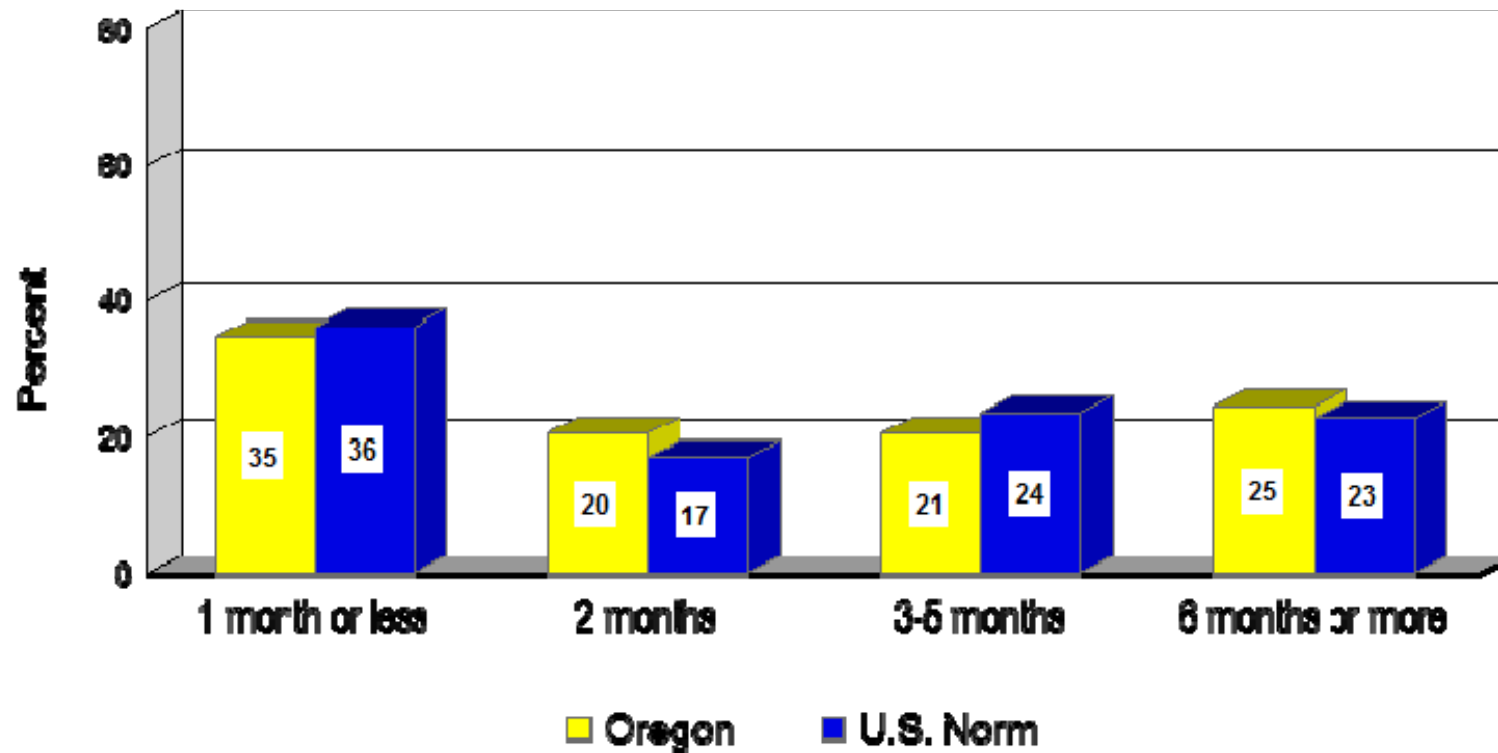


Trip Planning and Booking

Planning Cycle



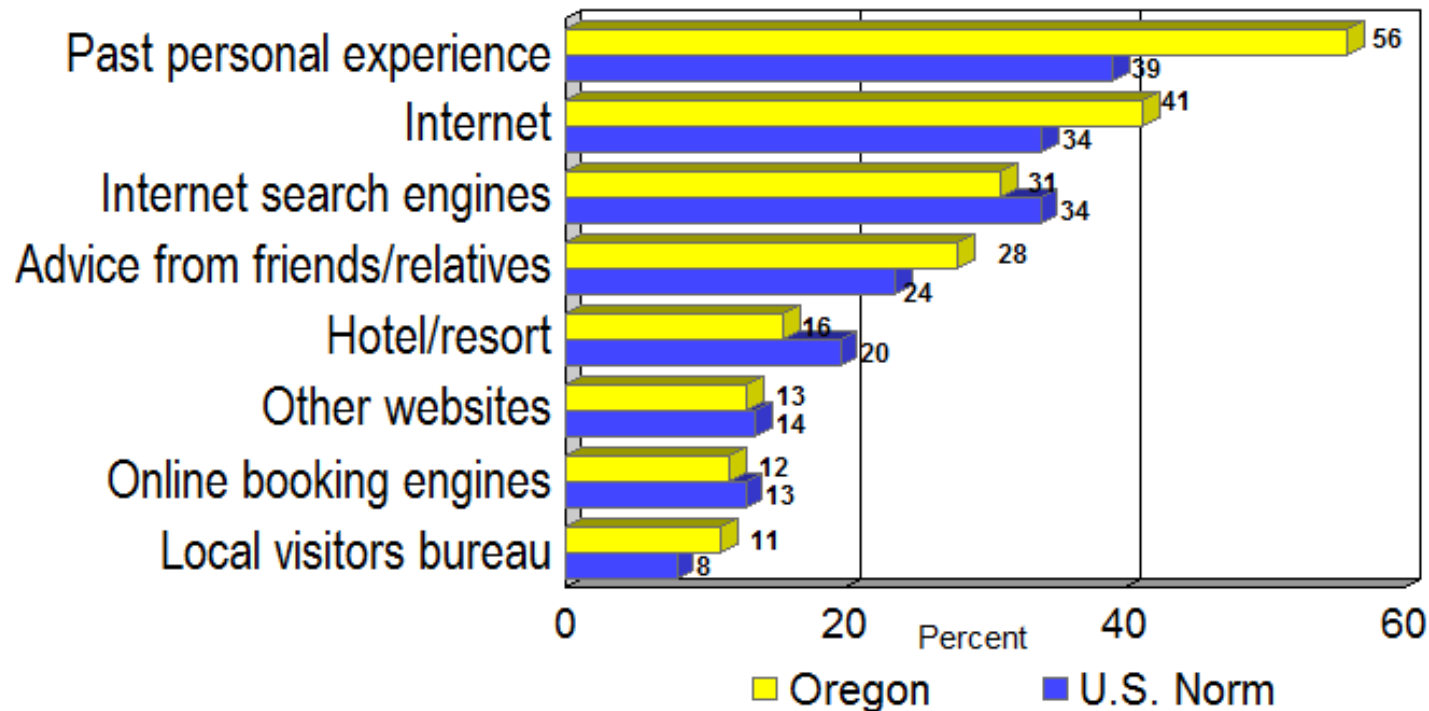
Base: 2006 Overnight Marketable Trips



Information Sources Used for Planning



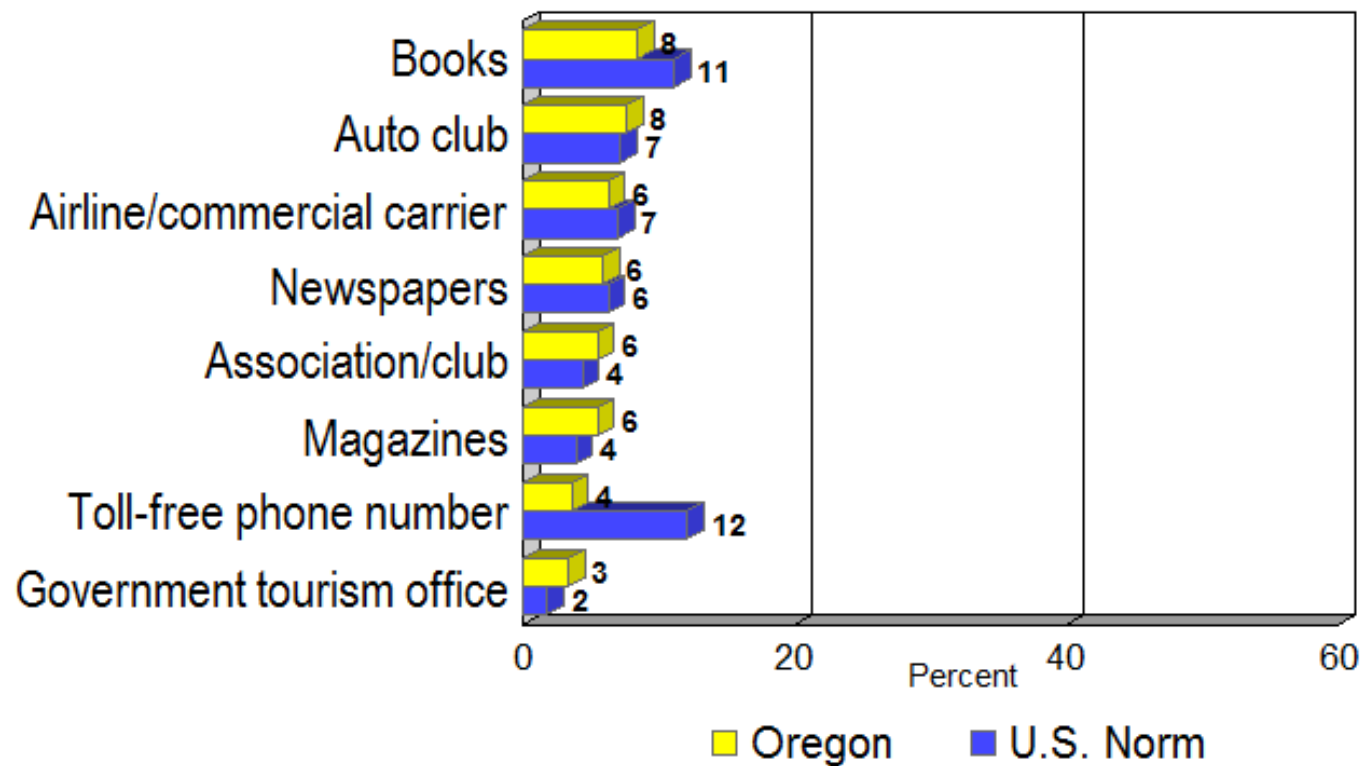
Base: 2006 Overnight Marketable Trips



Information Sources Used for Planning (Cont'd)



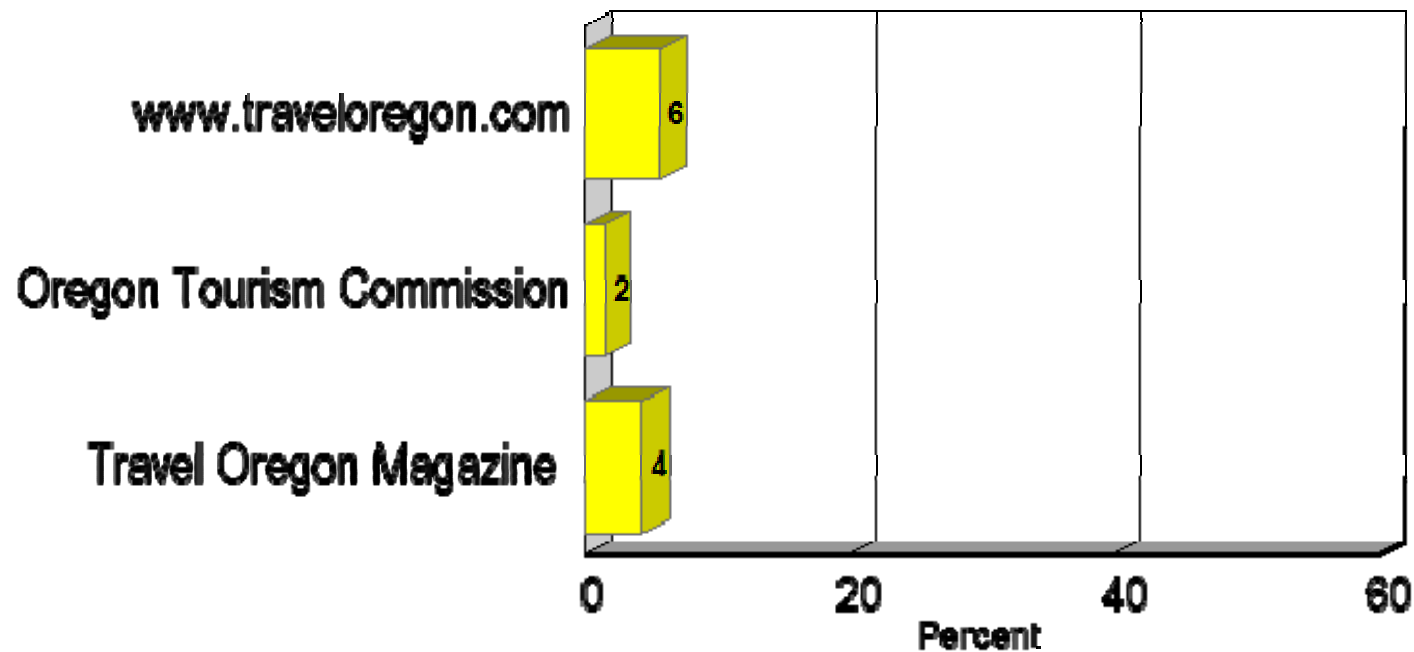
Base: 2006 Overnight Marketable Trips



Oregon Tourism Sources Used or Contacted for Planning



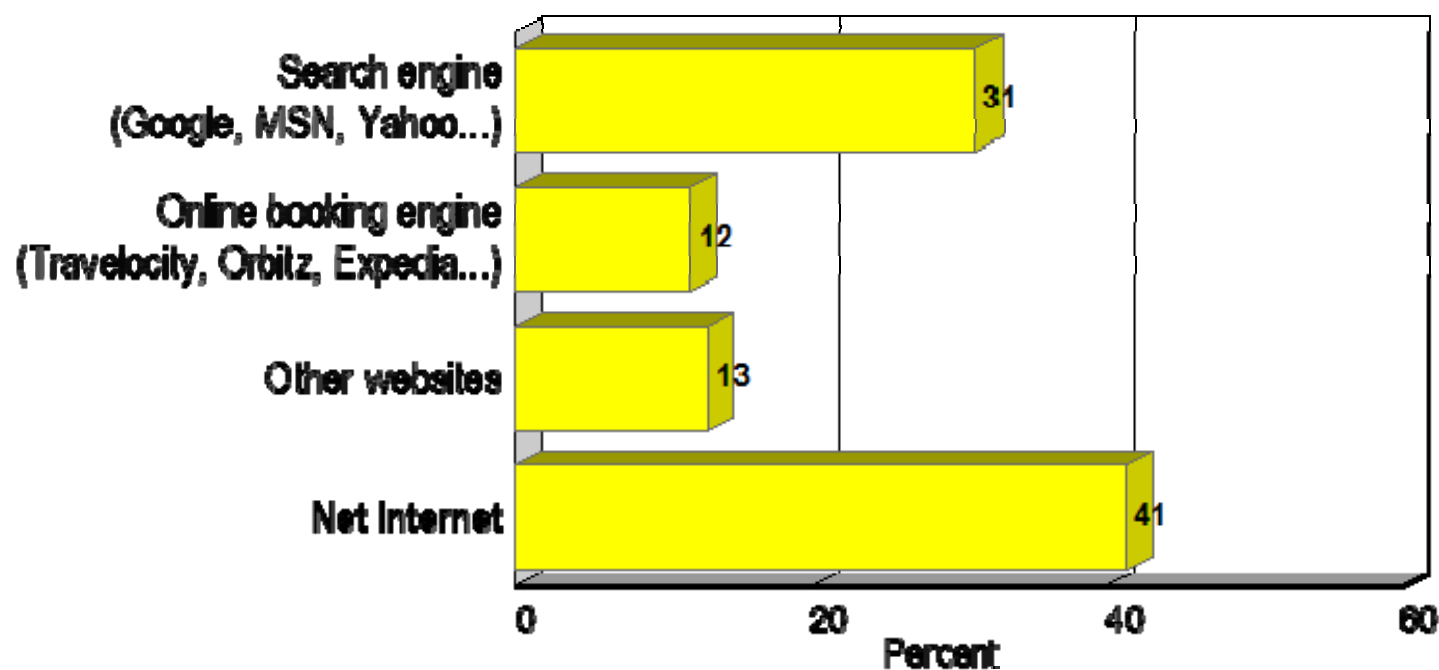
Base: 2006 Overnight Marketable Trips



Web Sites Used for Planning



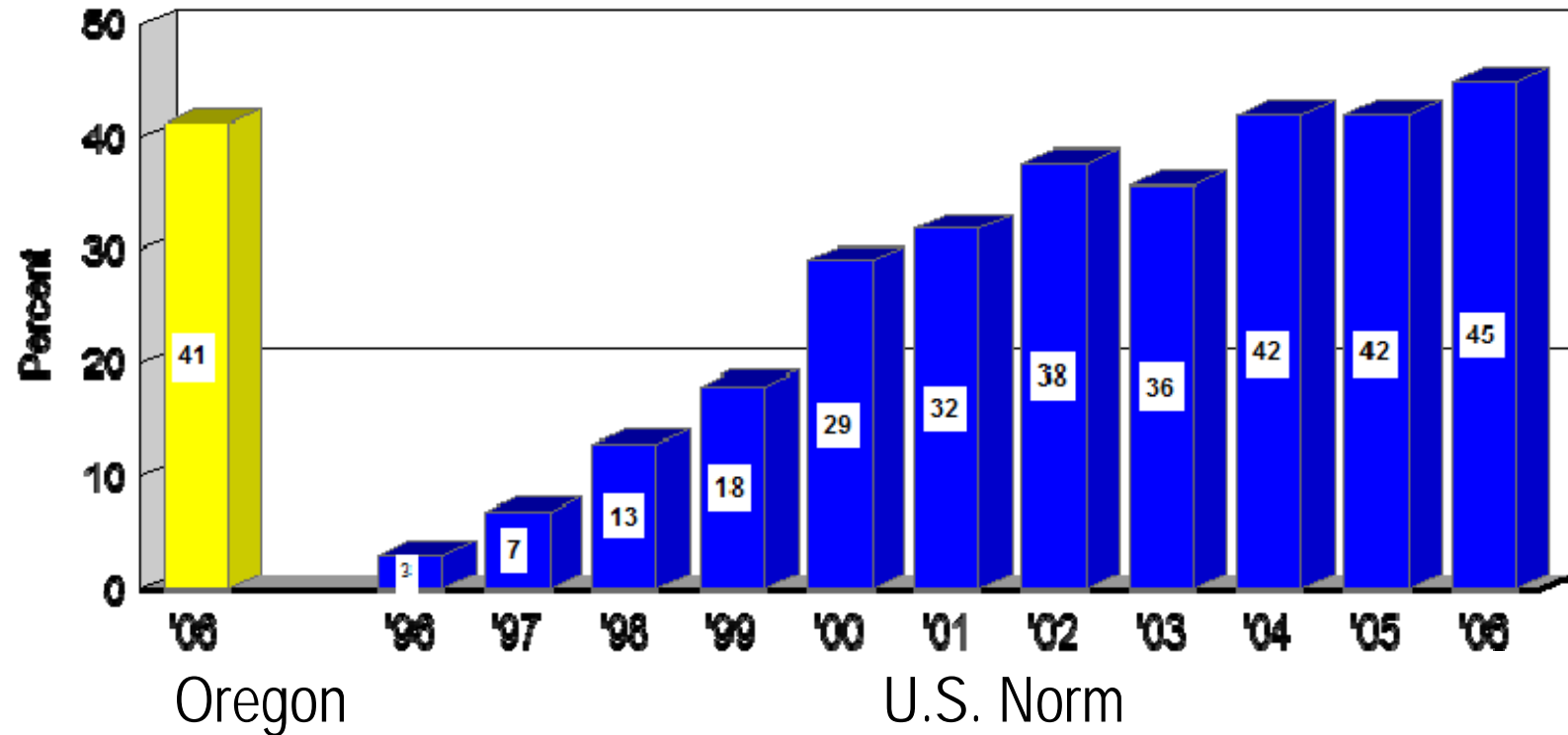
Base: 2006 Overnight Marketable Trips



Use of Internet for Trip Planning



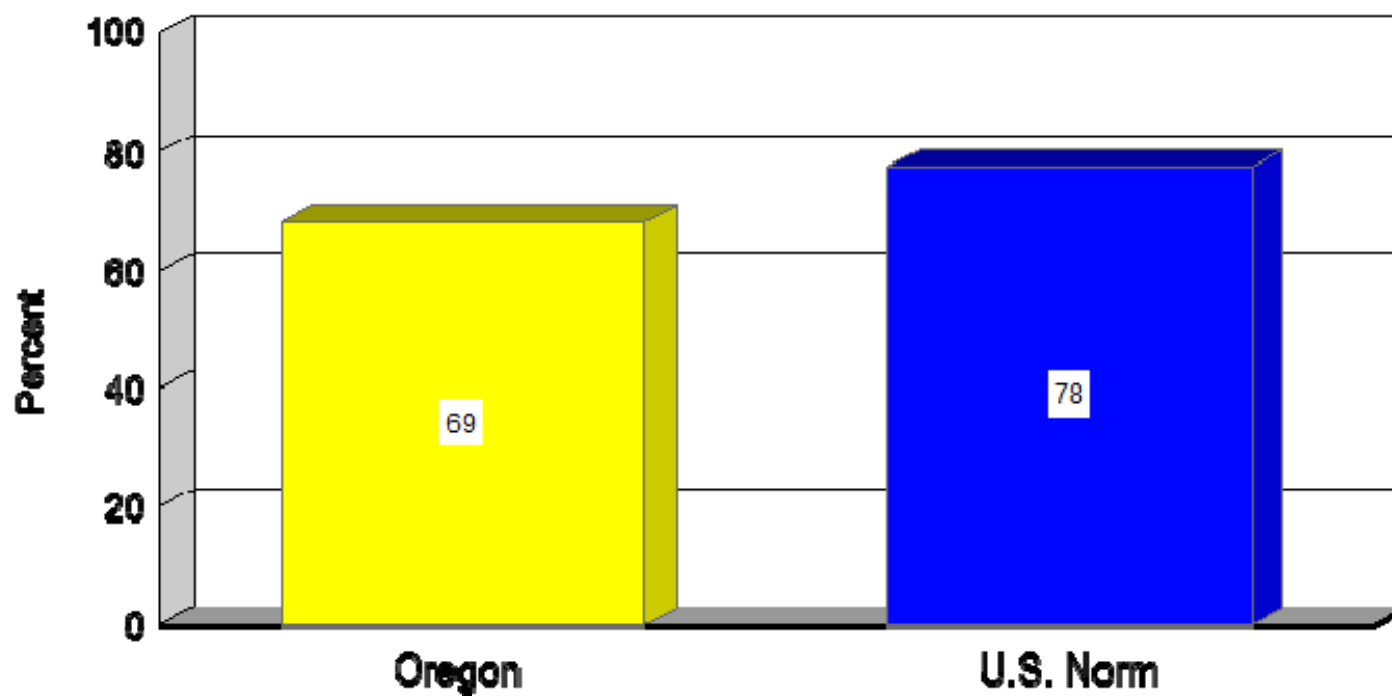
Base: 2006 Overnight Marketable Trips



Percent Who Booked In Advance



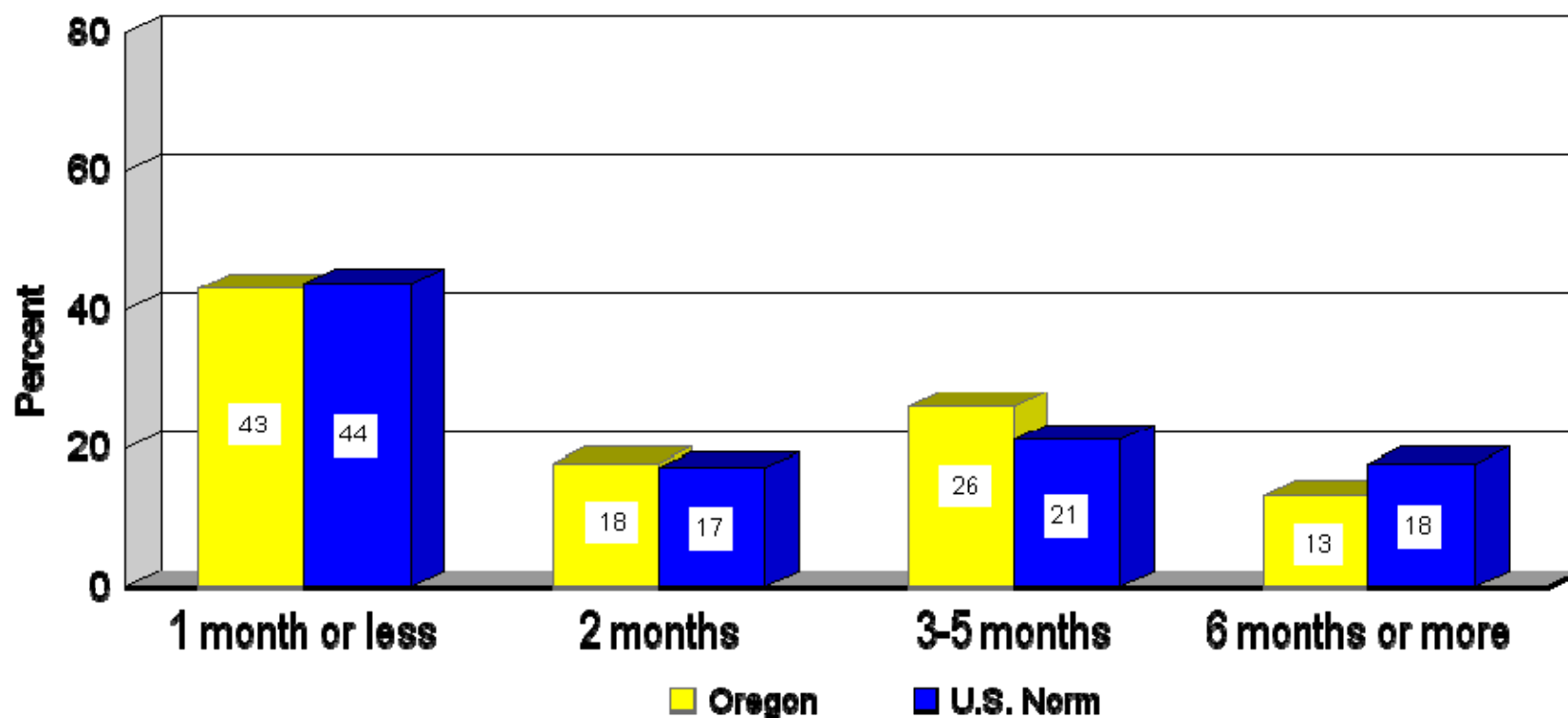
Base: 2006 Overnight Marketable Trips



Booking Cycle



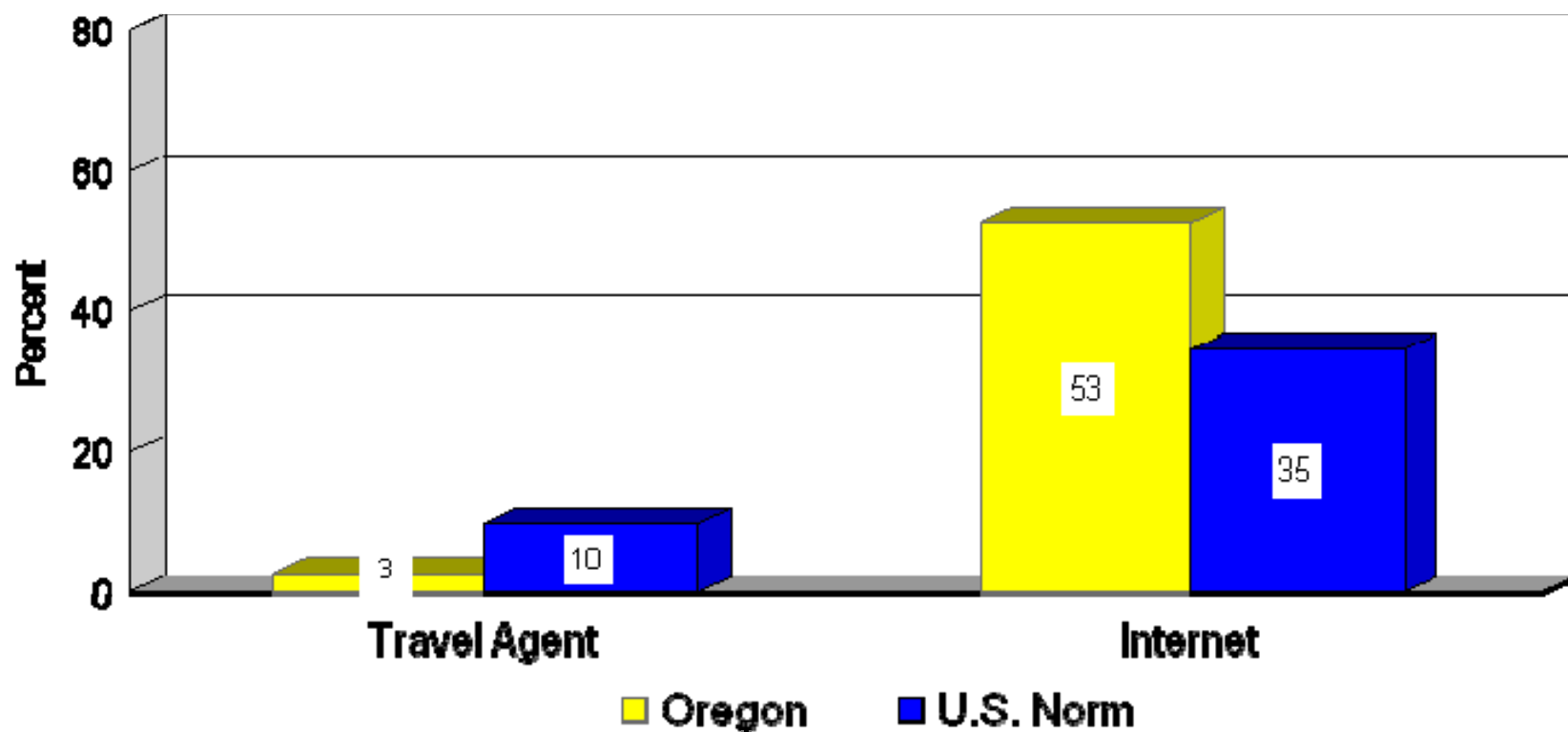
Base: 2006 Overnight Marketable Trips Booked in Advance



Methods of Booking



Base: 2006 Overnight Marketable Trips Booked in Advance

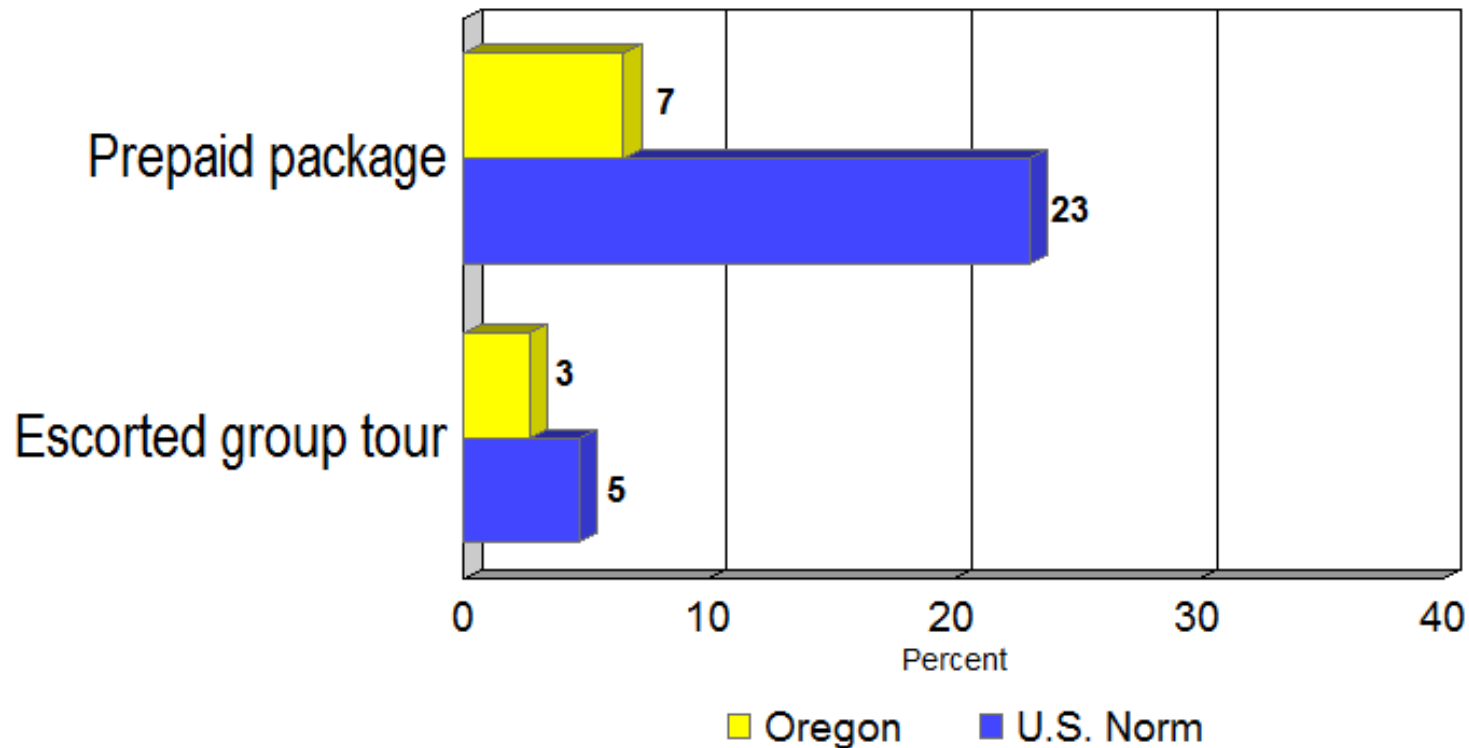


Trip Characteristics

Use of Vacation Packages and Group Travel



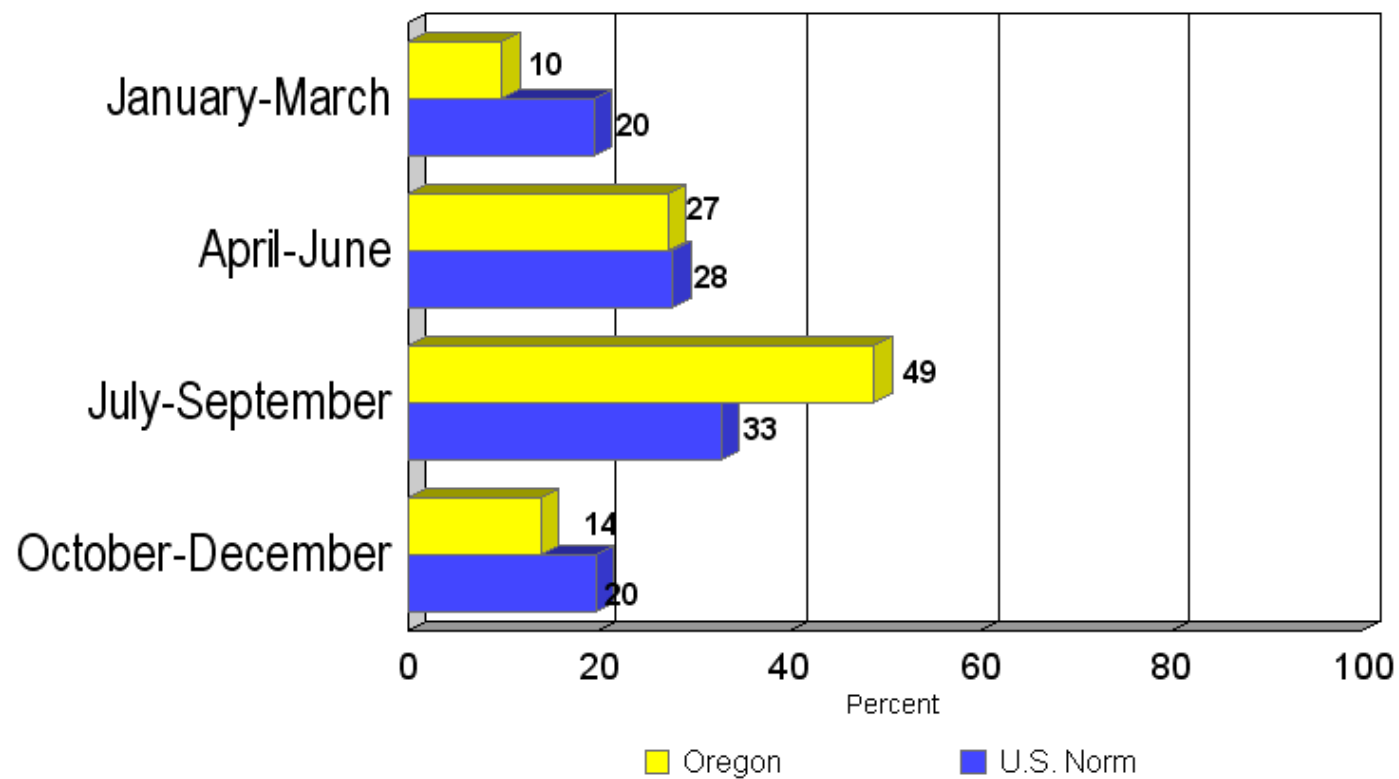
Base: 2006 Overnight Marketable Trips



Season of Trip



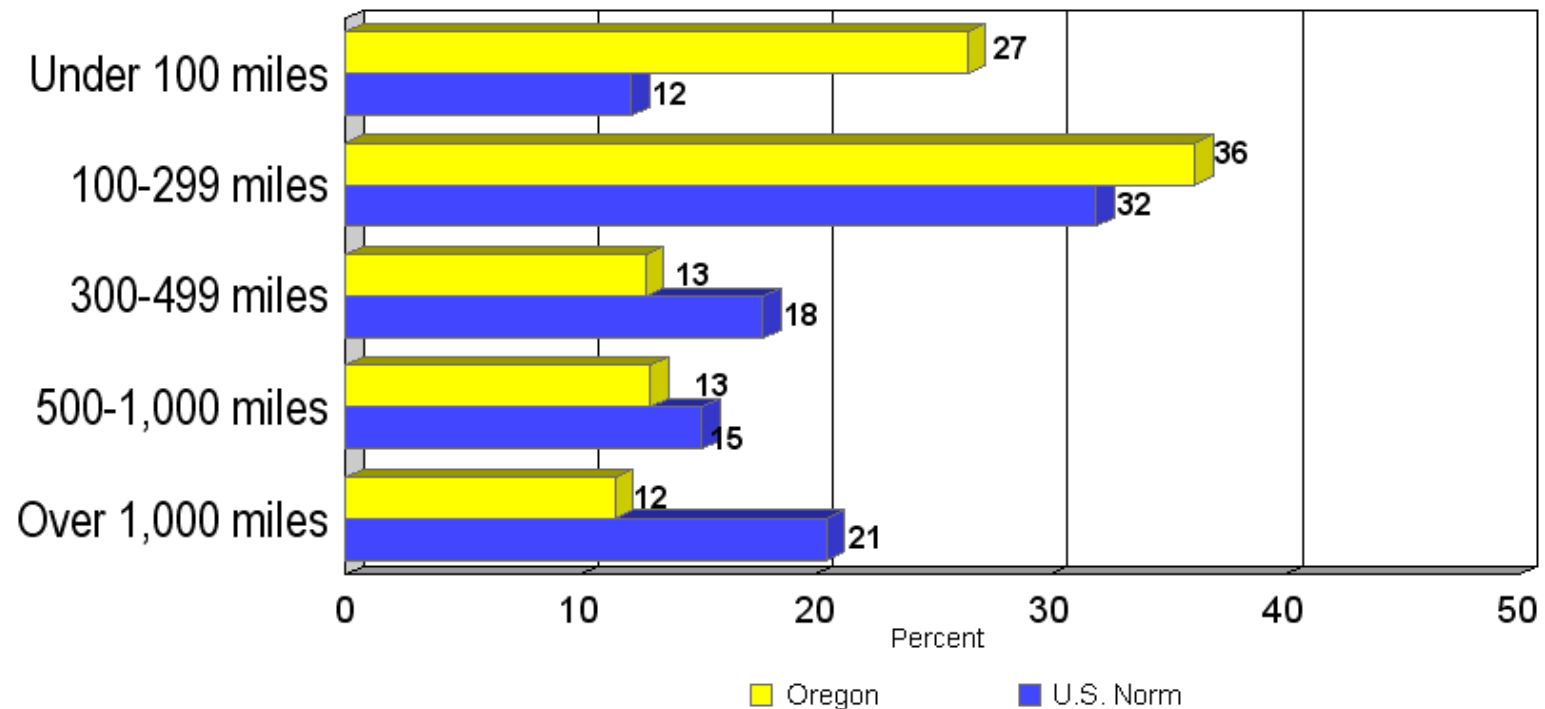
Base: 2006 Overnight Marketable Trips



Distance Traveled to Oregon



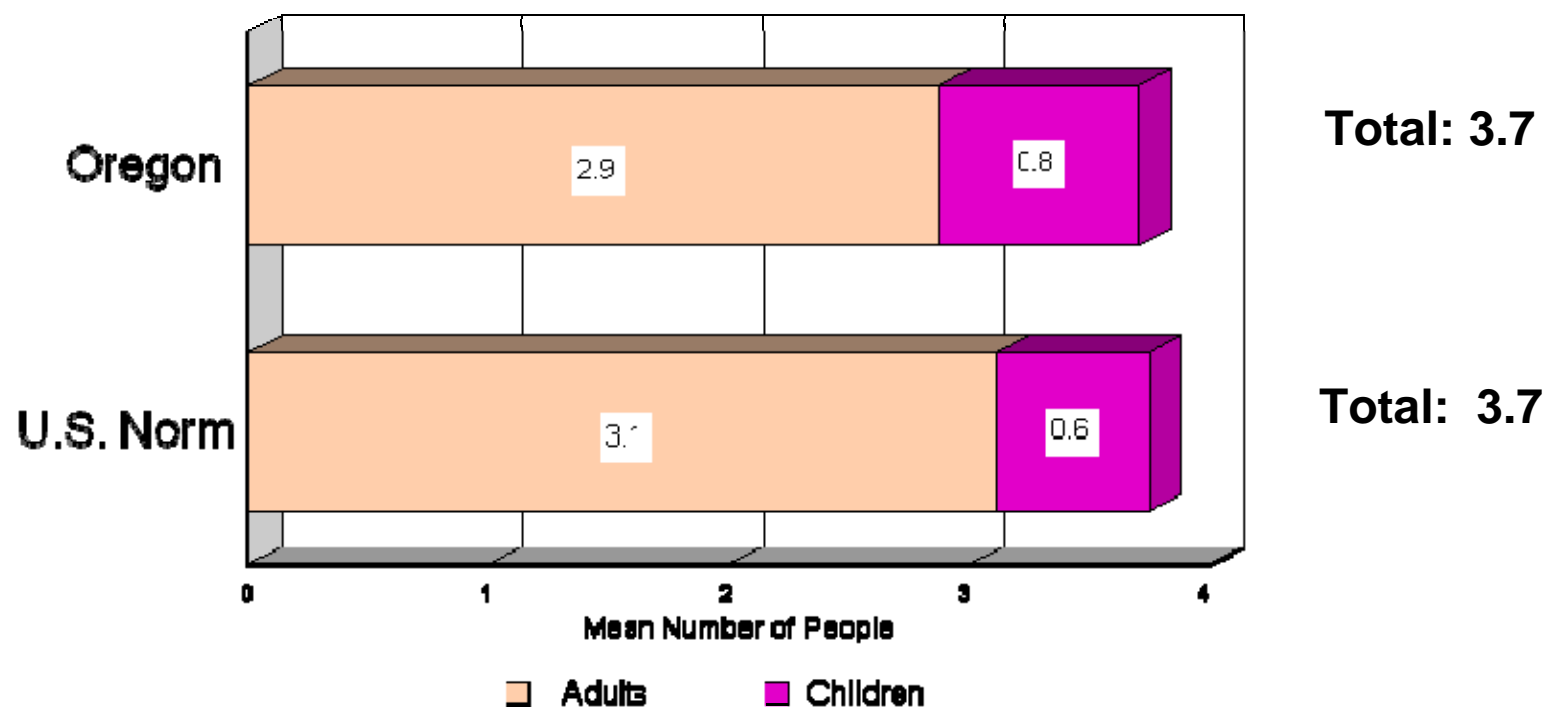
Base: 2006 Overnight Marketable Trips



Size of Travel Party



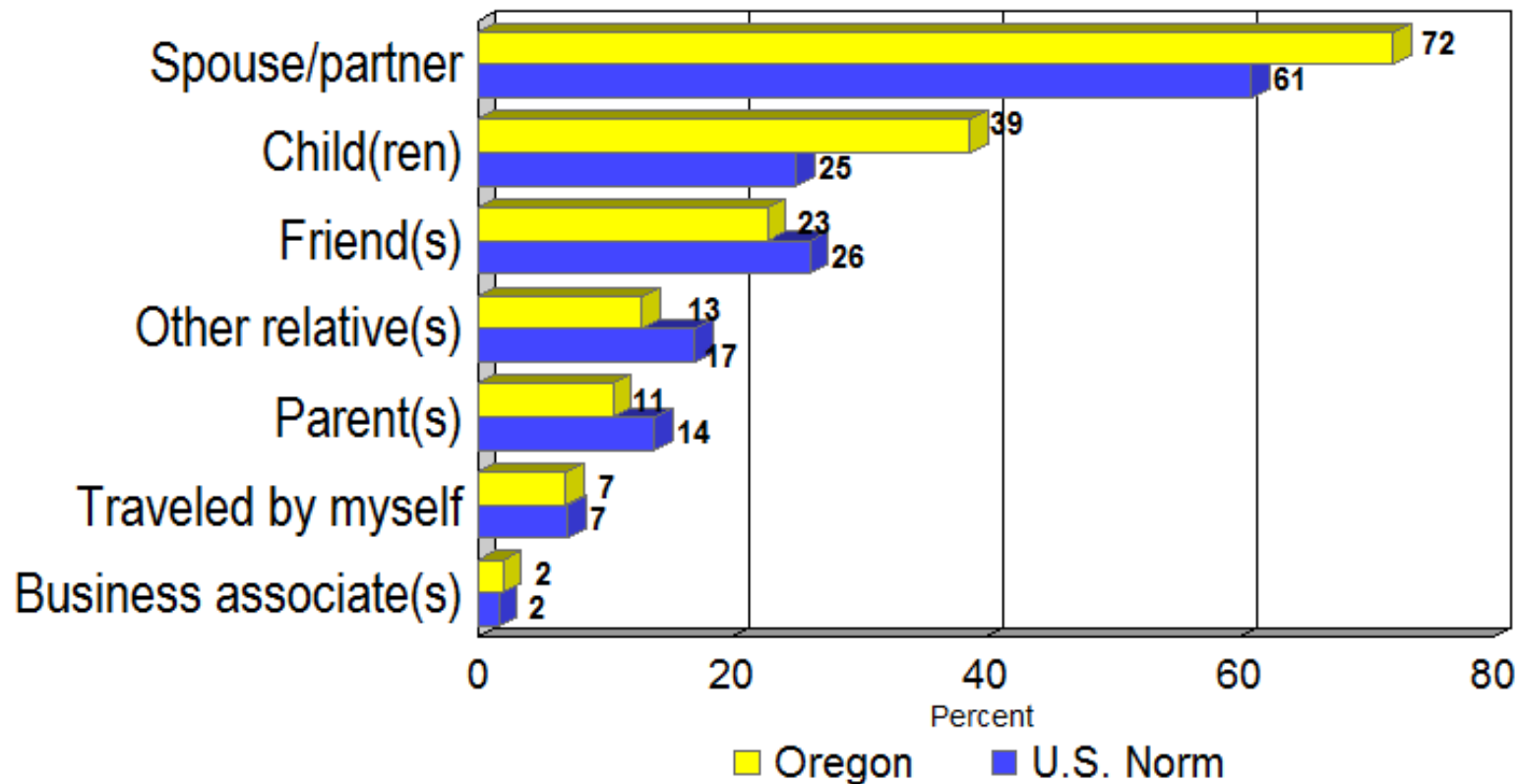
Base: 2006 Overnight Marketable Trips



Composition of Travel Party



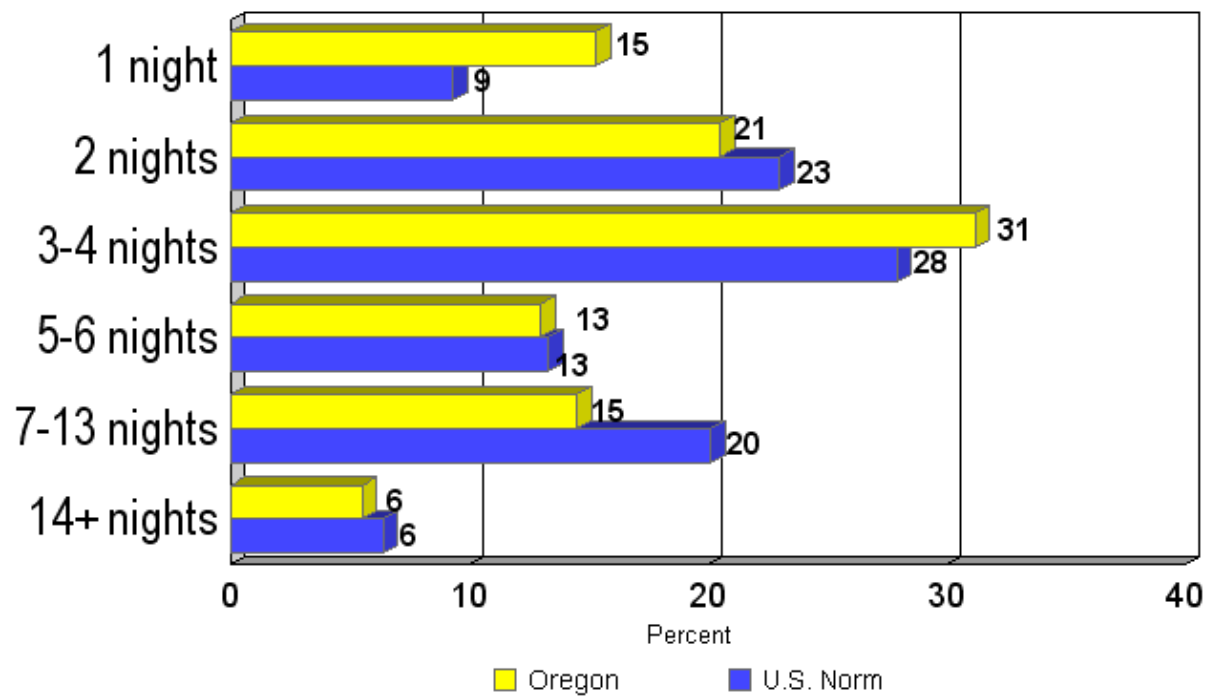
Base: 2006 Overnight Marketable Trips



Total Nights Away



Base: 2006 Overnight Marketable Trips

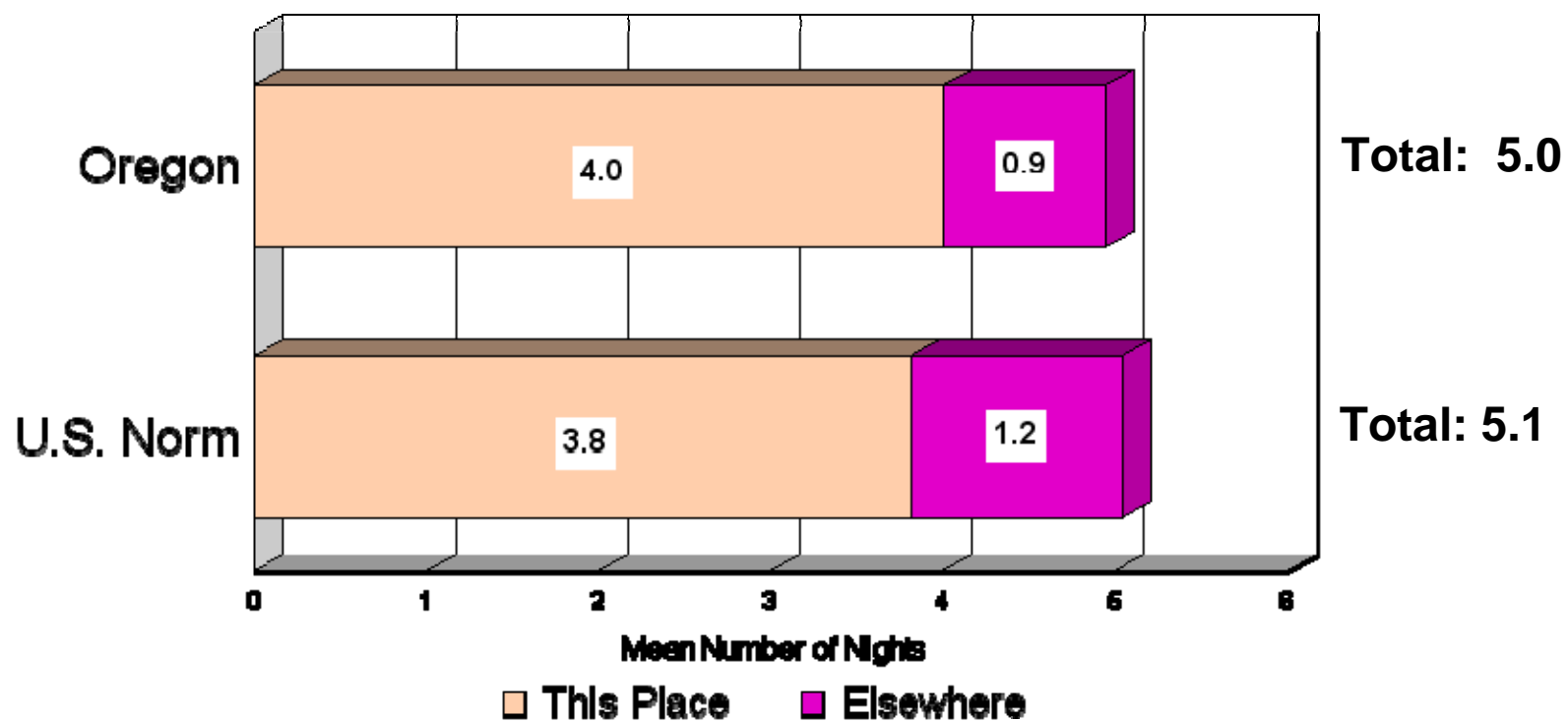


| | <u>Oregon</u> | <u>U.S. Norm</u> |
|--------------------------|---------------|------------------|
| Average Number of Nights | 4.9 | 5.1 |

Length of Stay



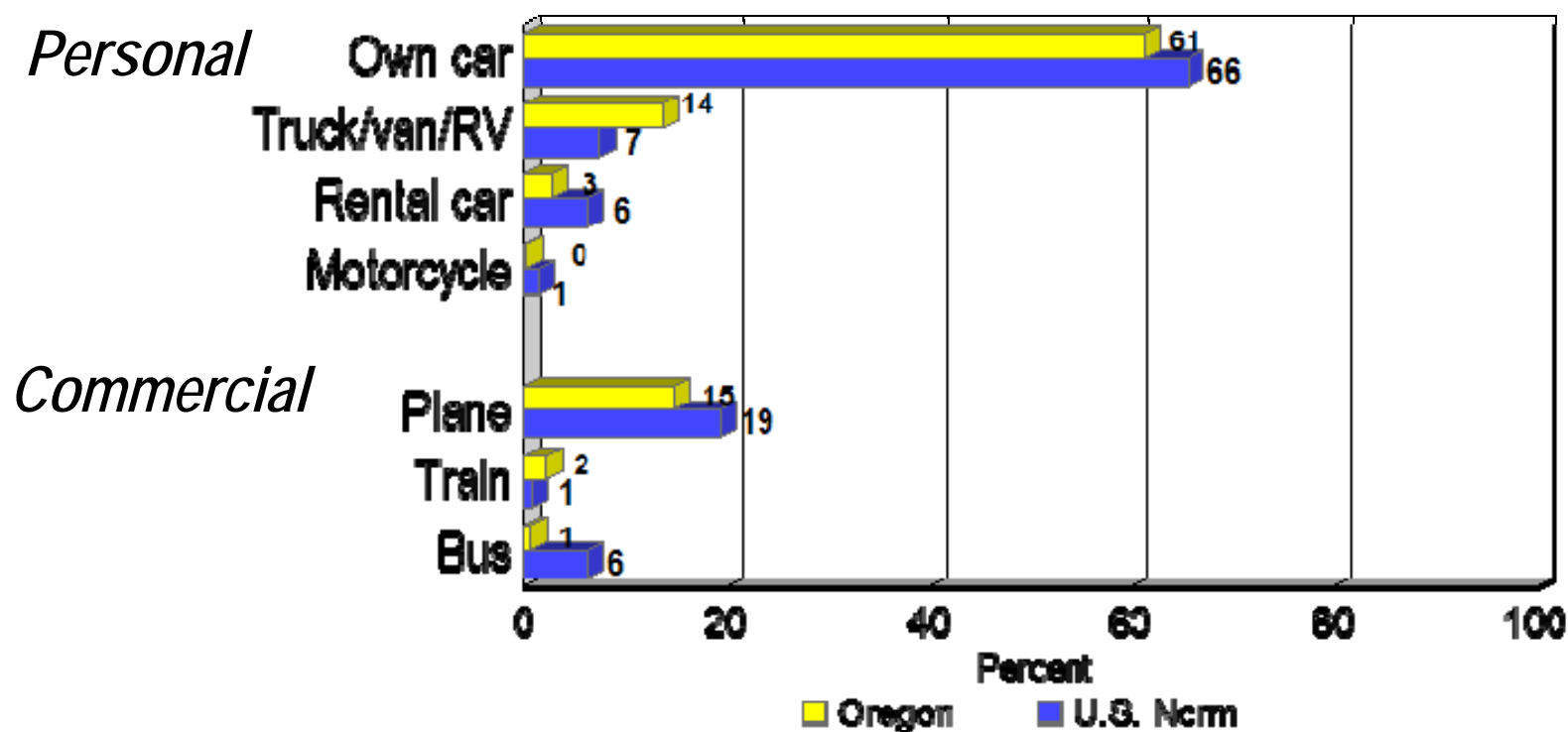
Base: 2006 Overnight Marketable Trips



Transportation Used to Enter Destination



Base: 2006 Overnight Marketable Trips

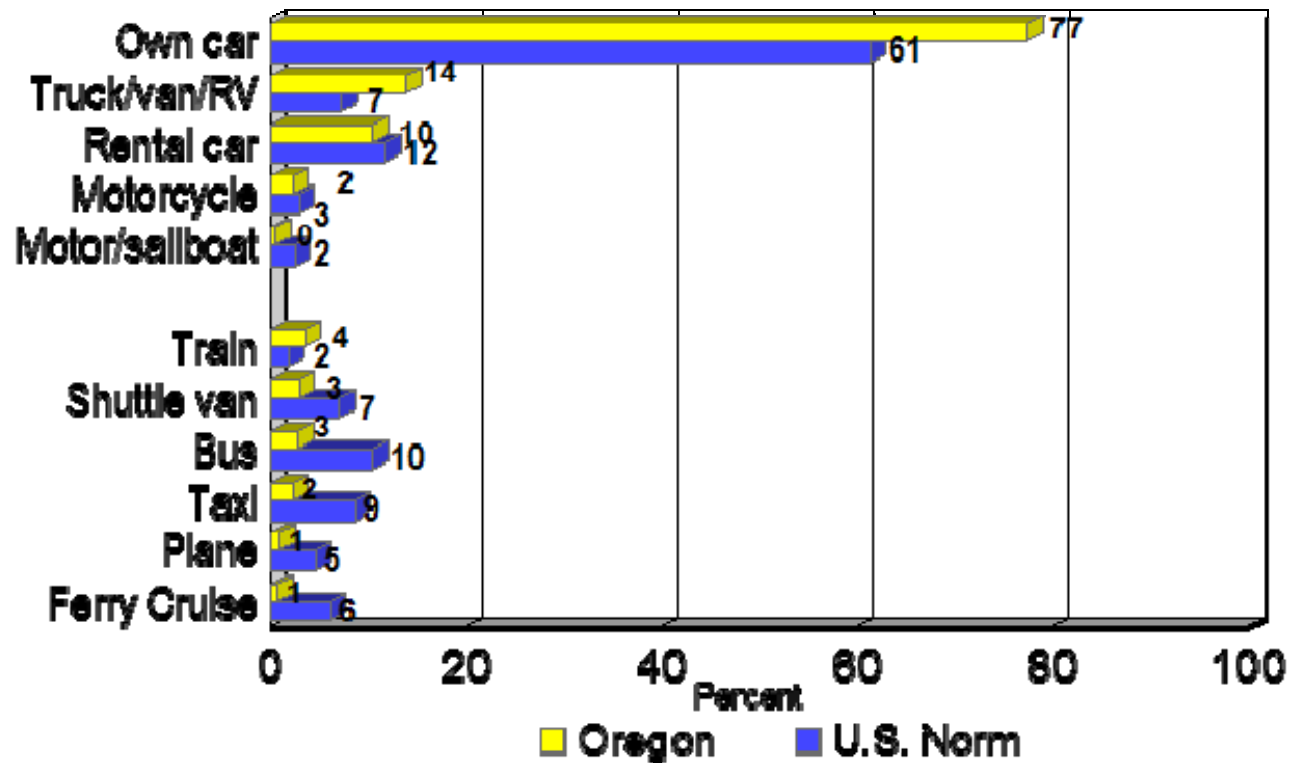


Transportation Used Inside Destination



Base: 2006 Overnight Marketable Trips

Personal

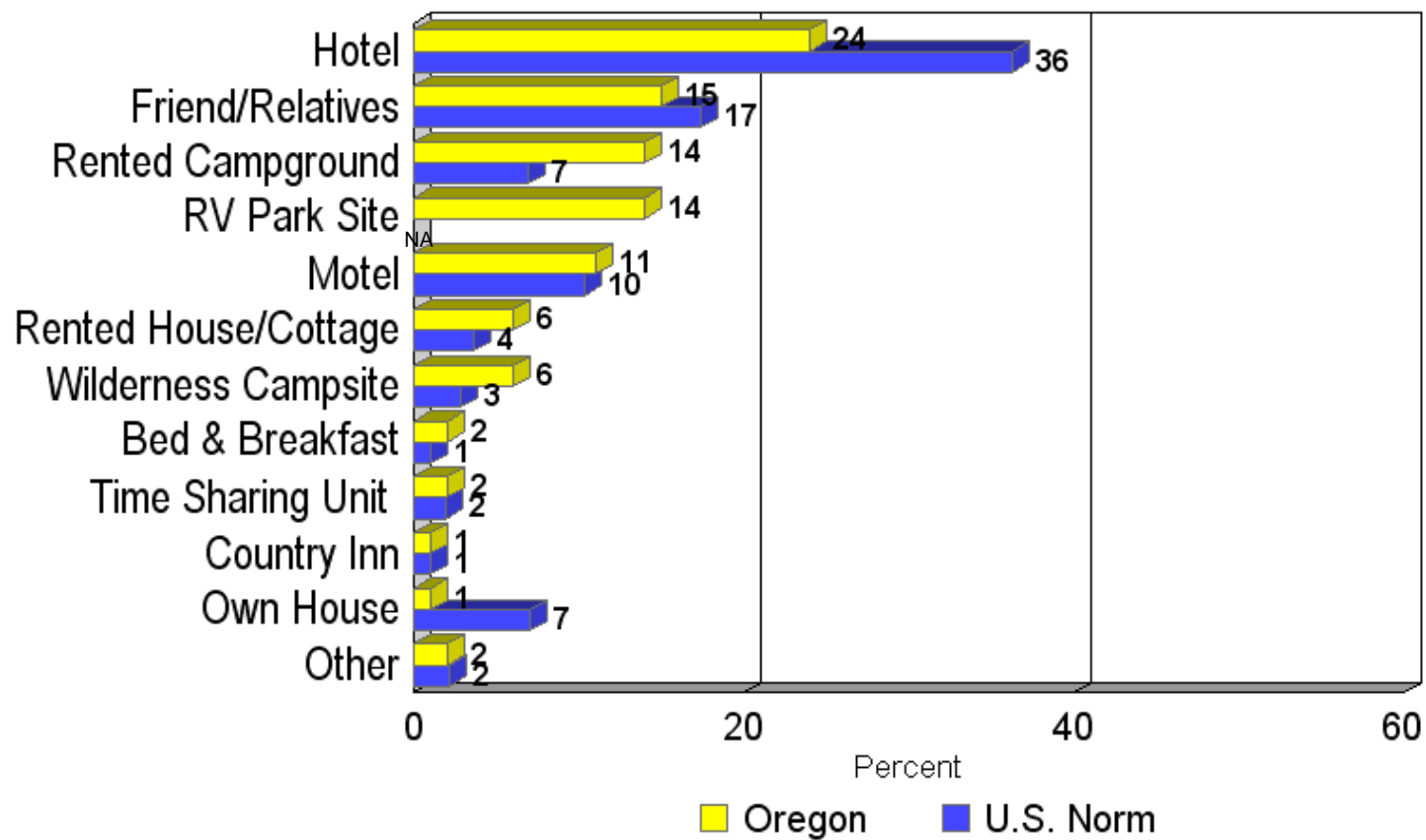


Commercial

Accommodations*



Base: 2006 Overnight Marketable Trips



* Percent of trip nights spent in each type of accommodation

Trip Experiences

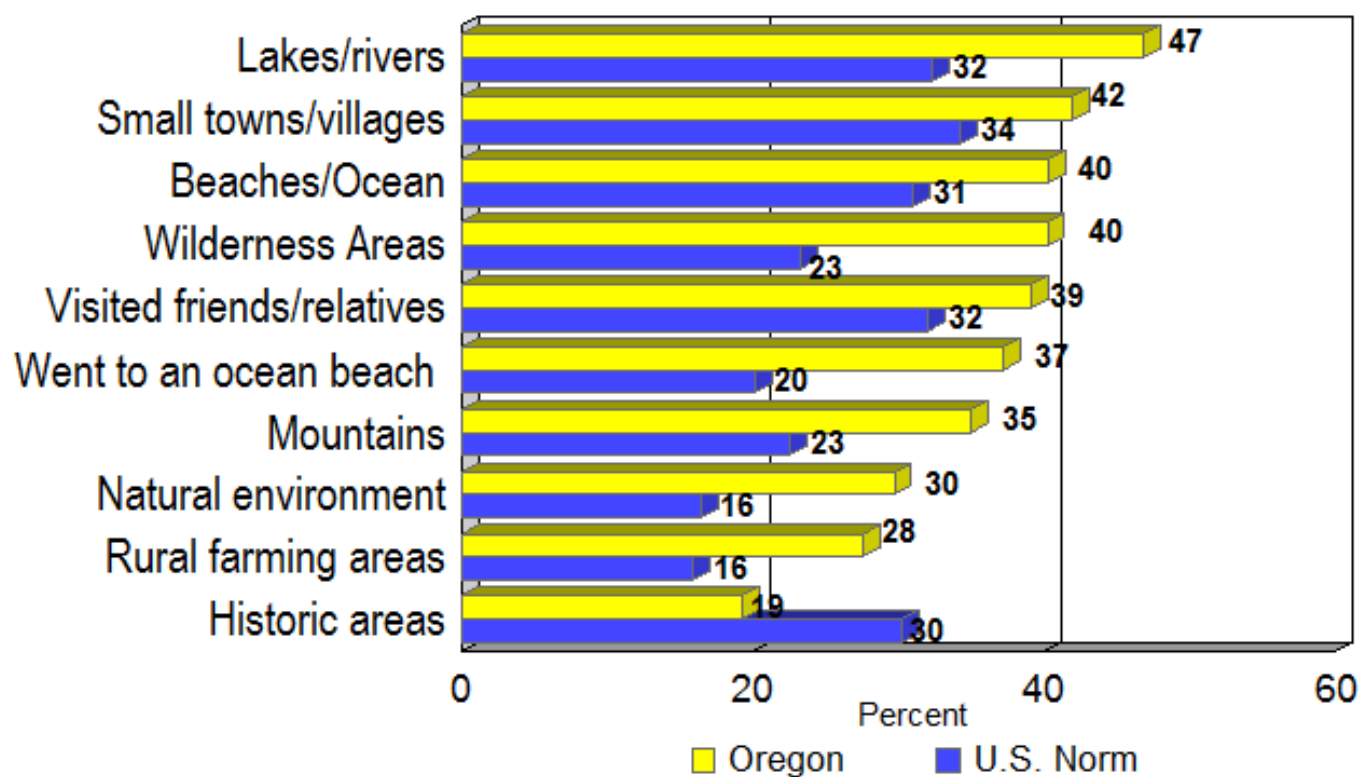
Trip Experiences

— Oregon Vs. U.S. Norms —

Experiences and Sightseeing



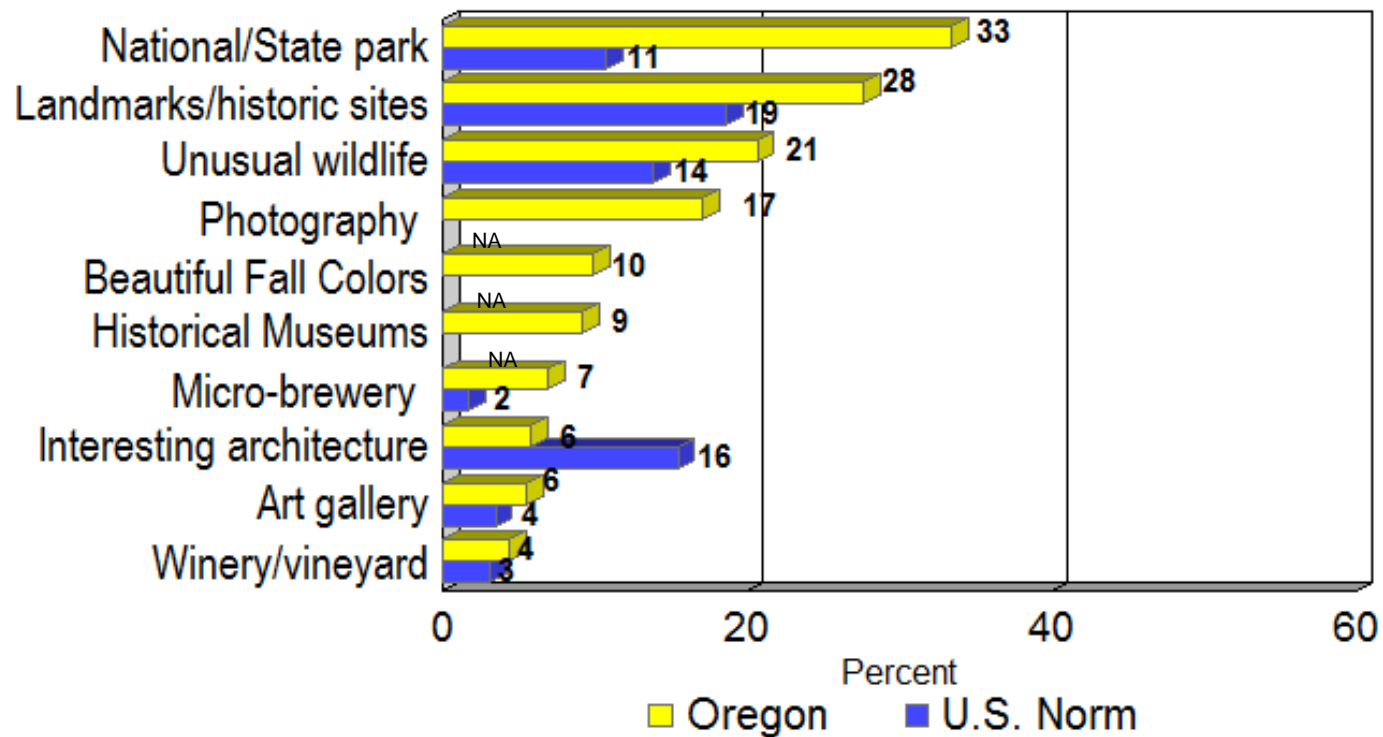
Base: 2006 Overnight Marketable Trips



Experiences and Sightseeing (Cont'd)



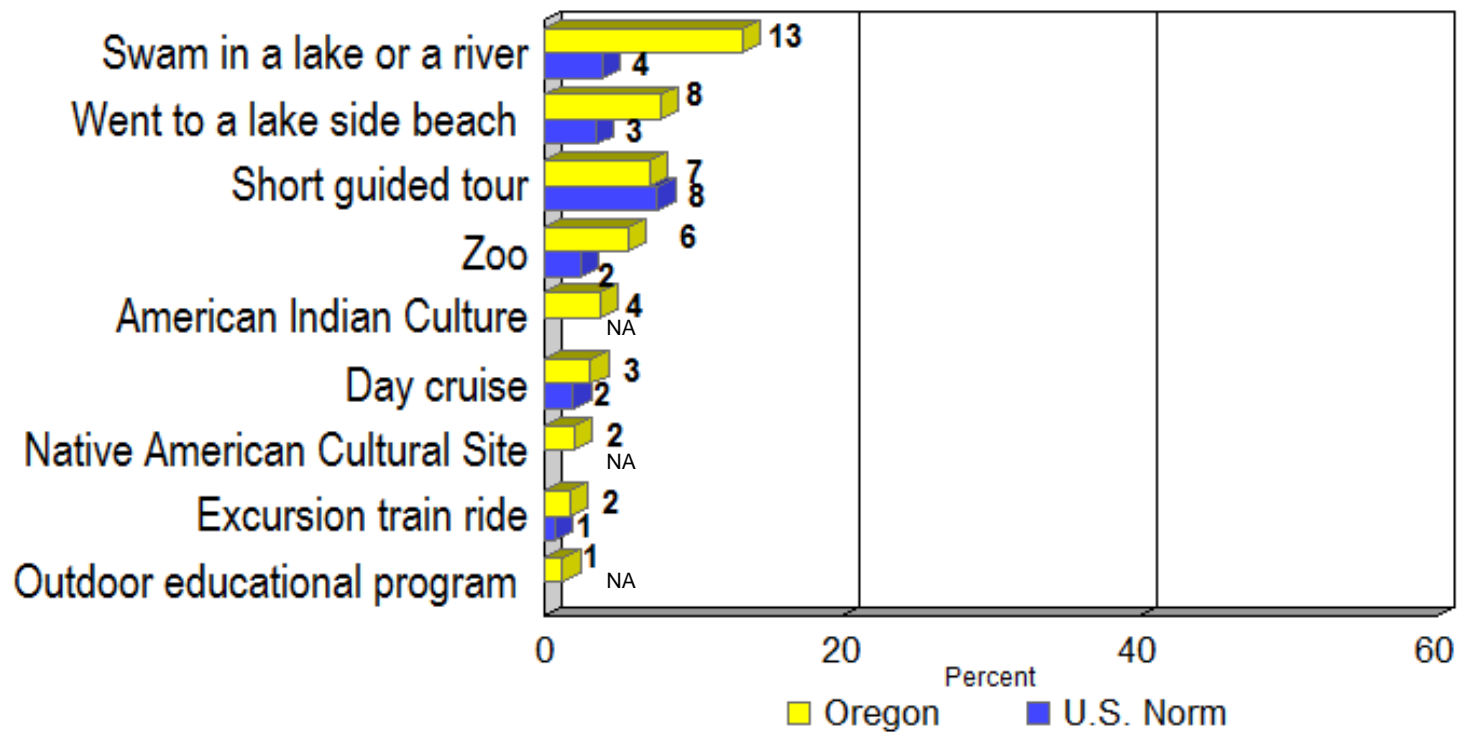
Base: 2006 Overnight Marketable Trips



Experiences and Sightseeing (Cont'd)



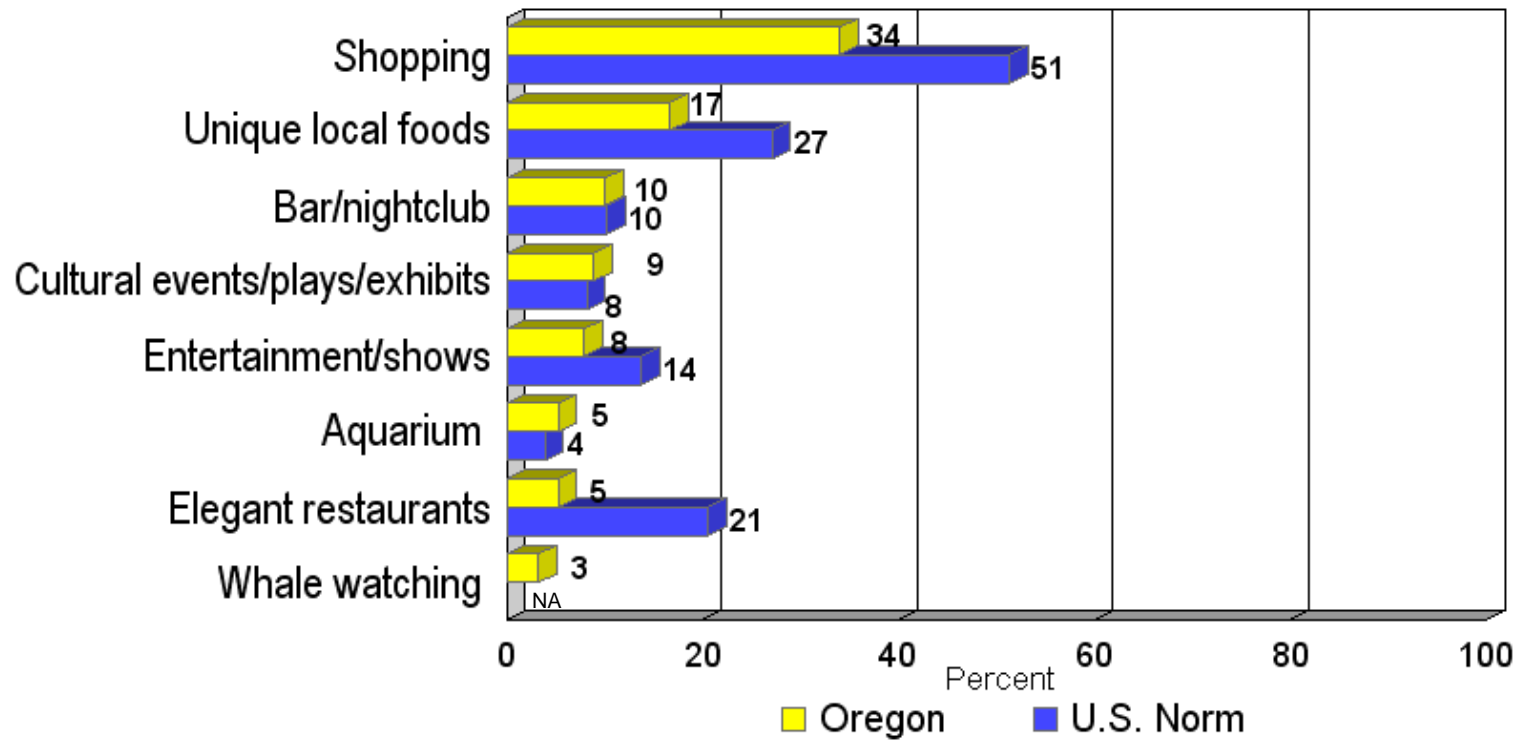
Base: 2006 Overnight Marketable Trips



Entertainment



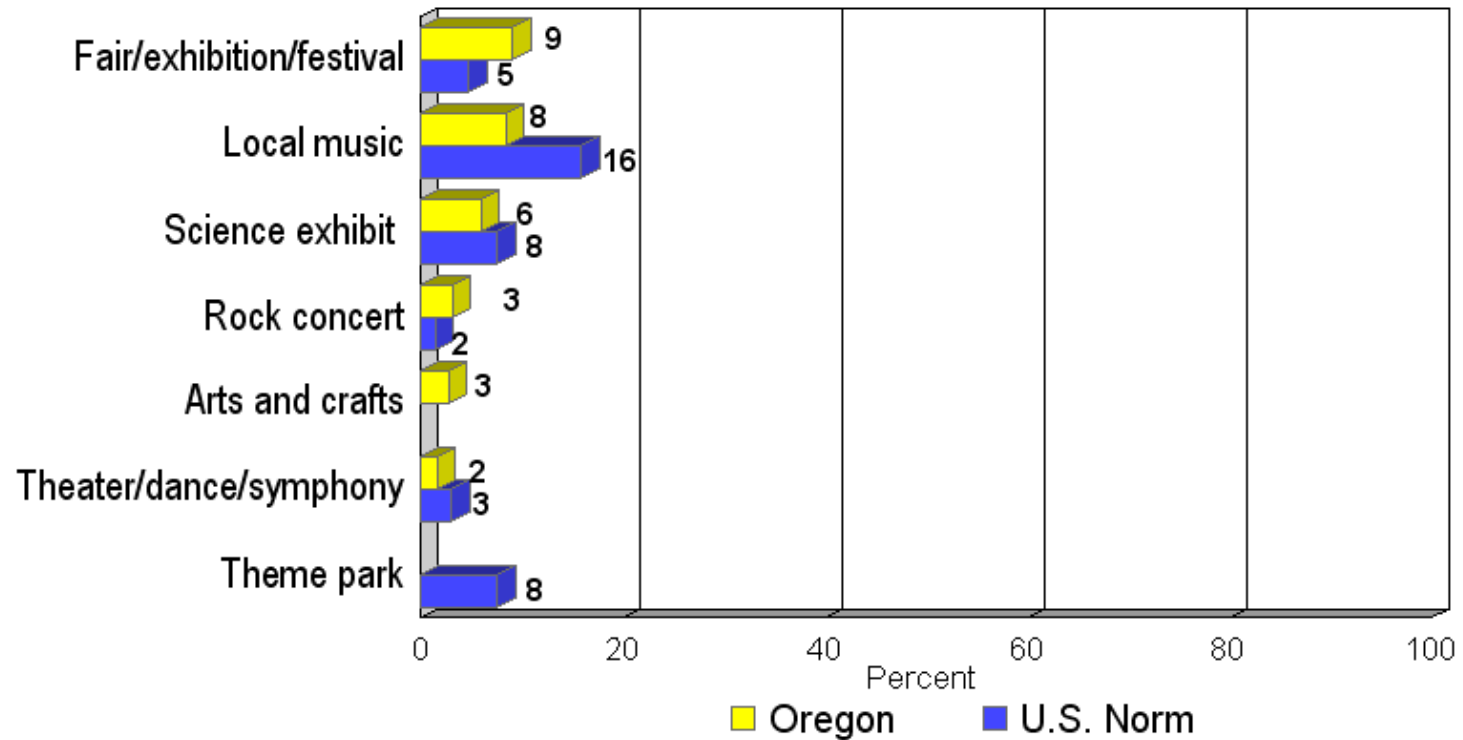
Base: 2006 Overnight Marketable Trips



Entertainment (Cont'd)



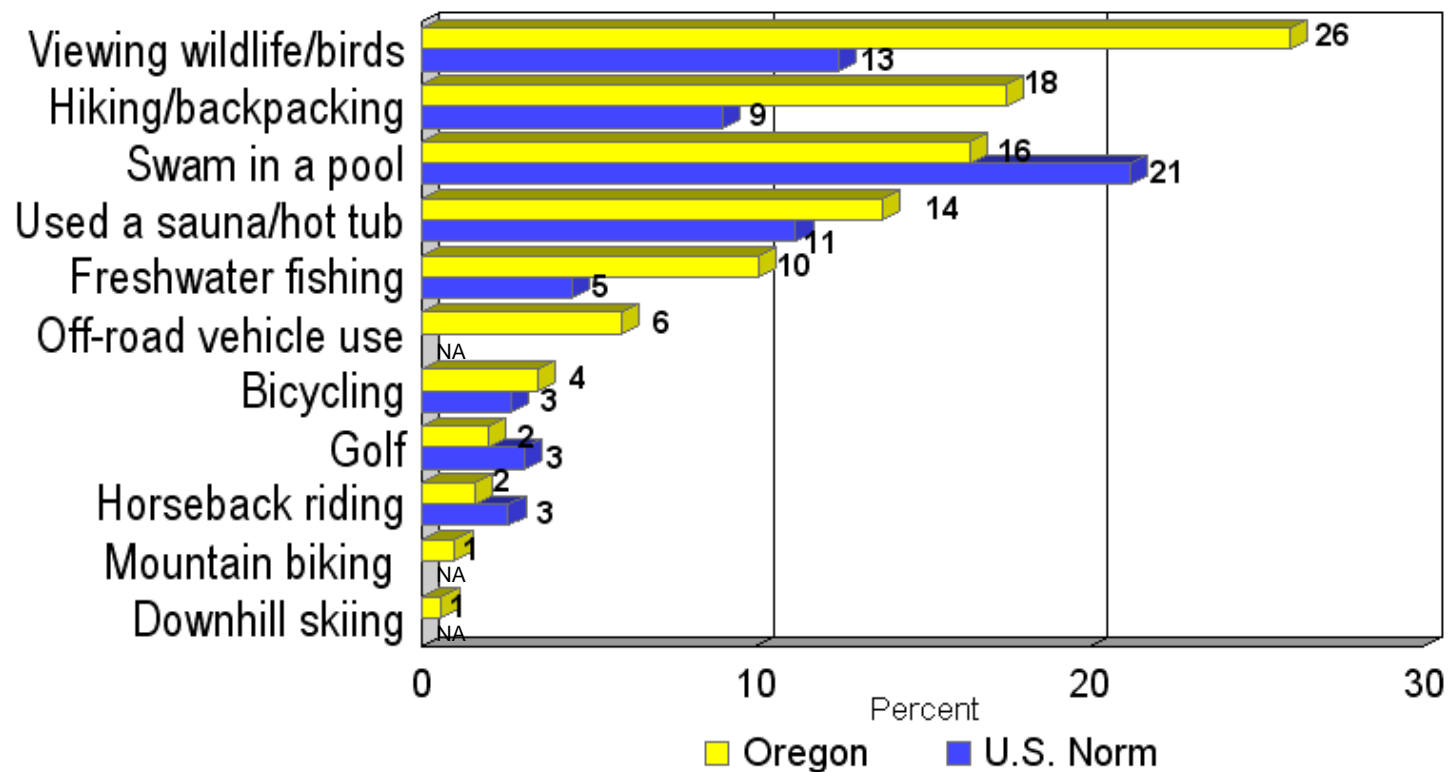
Base: 2006 Overnight Marketable Trips



Sports & Recreation



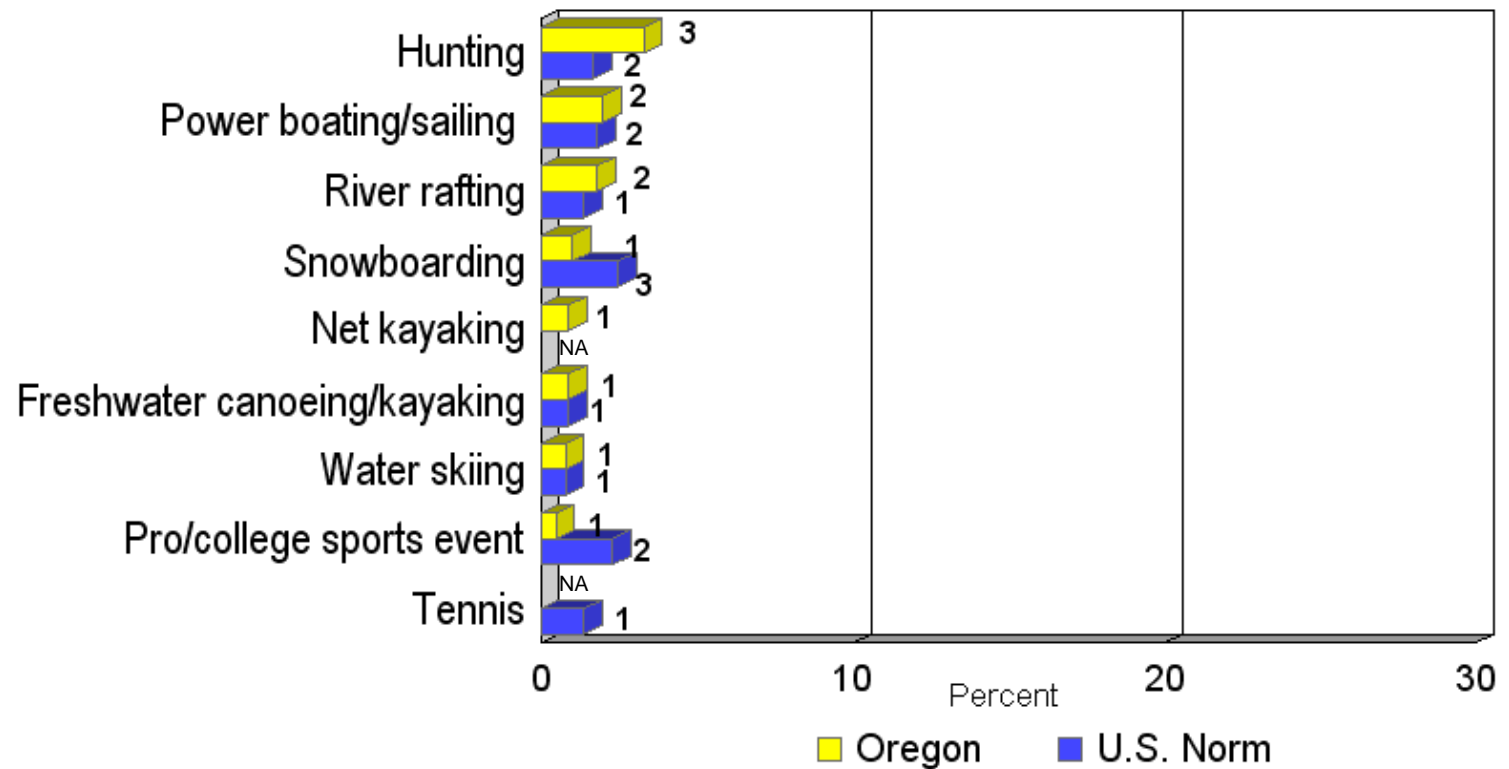
Base: 2006 Overnight Marketable Trips



Sports & Recreation (Cont'd)



Base: 2006 Overnight Marketable Trips

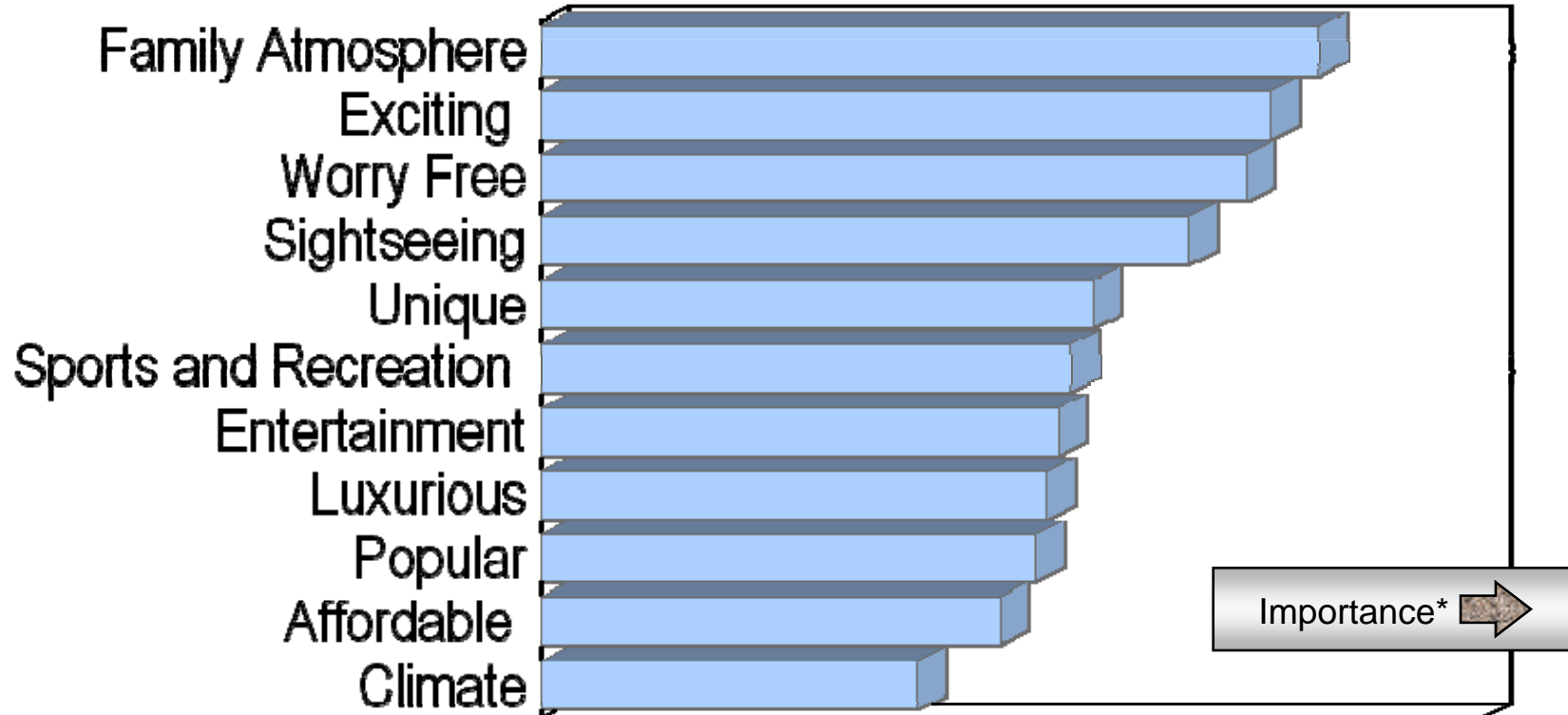


Oregon's Traveler Priorities

Traveler Priorities



Base: 2006 Overnight Marketable Trips



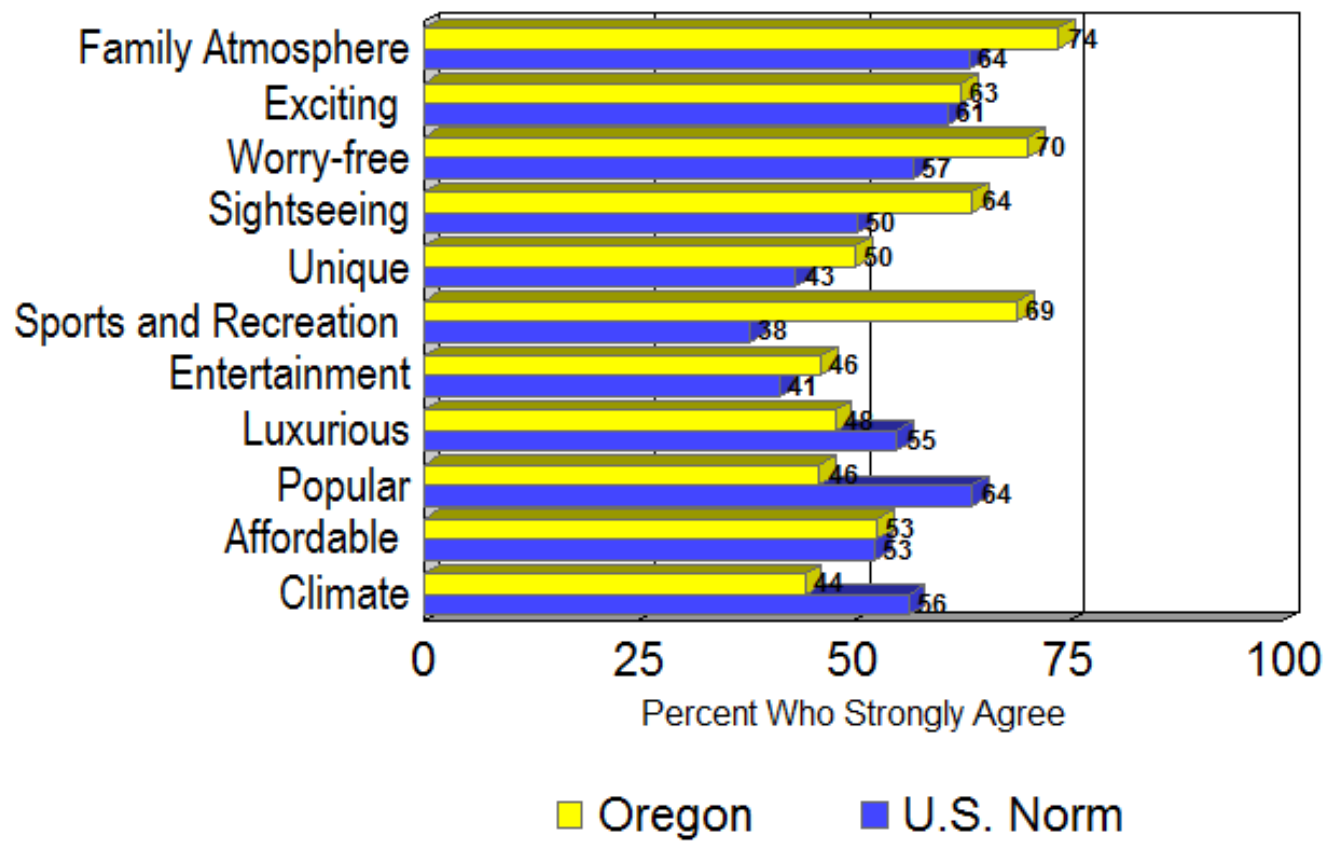
•A measure of the degree of association between each factor and whether destination is a place “I would really enjoy visiting.”

Oregon's Product vs. U.S. Norms

Oregon's Tourism Product



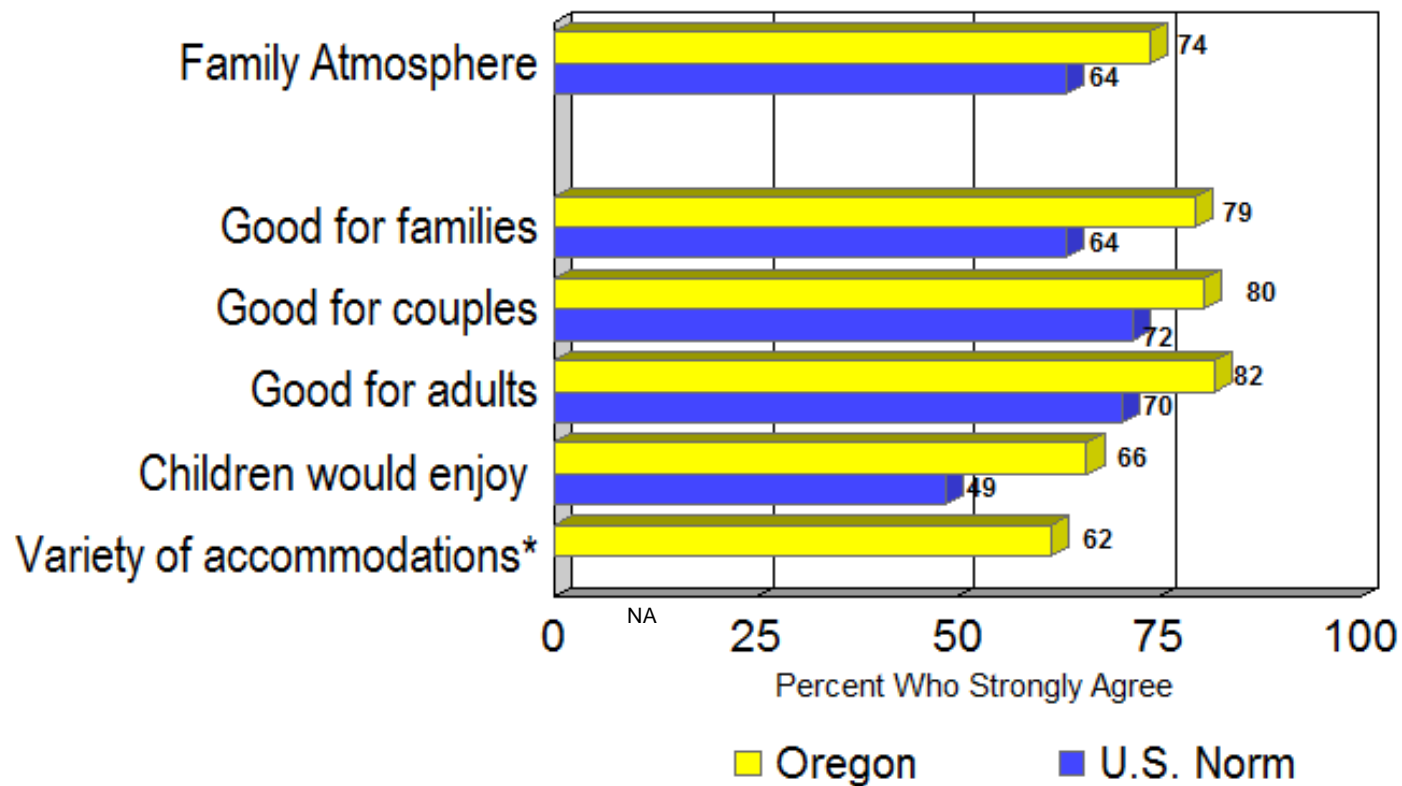
Base: 2006 Overnight Marketable Trips



Family Atmosphere



Base: 2006 Overnight Marketable Trips

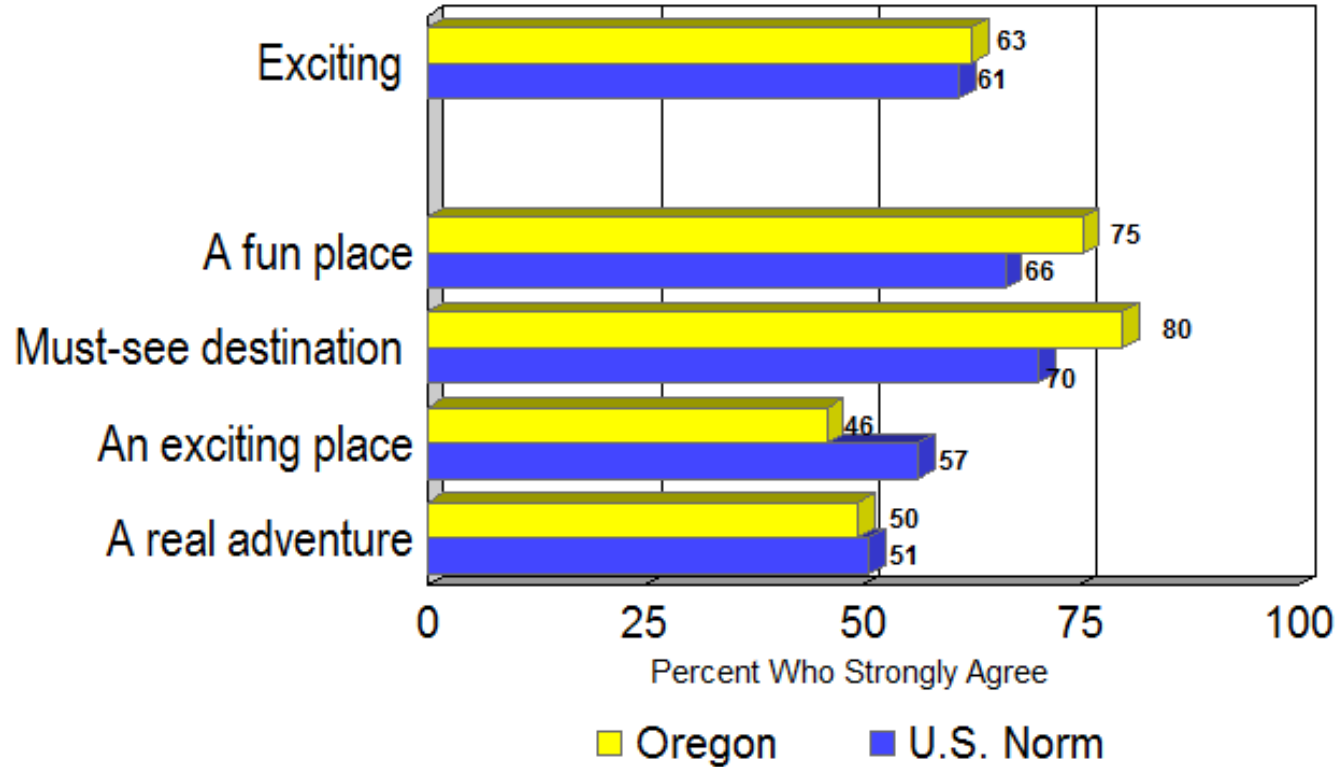


* No U.S. Norm available; excluded from overall "Family Atmosphere" average for Oregon

Exciting



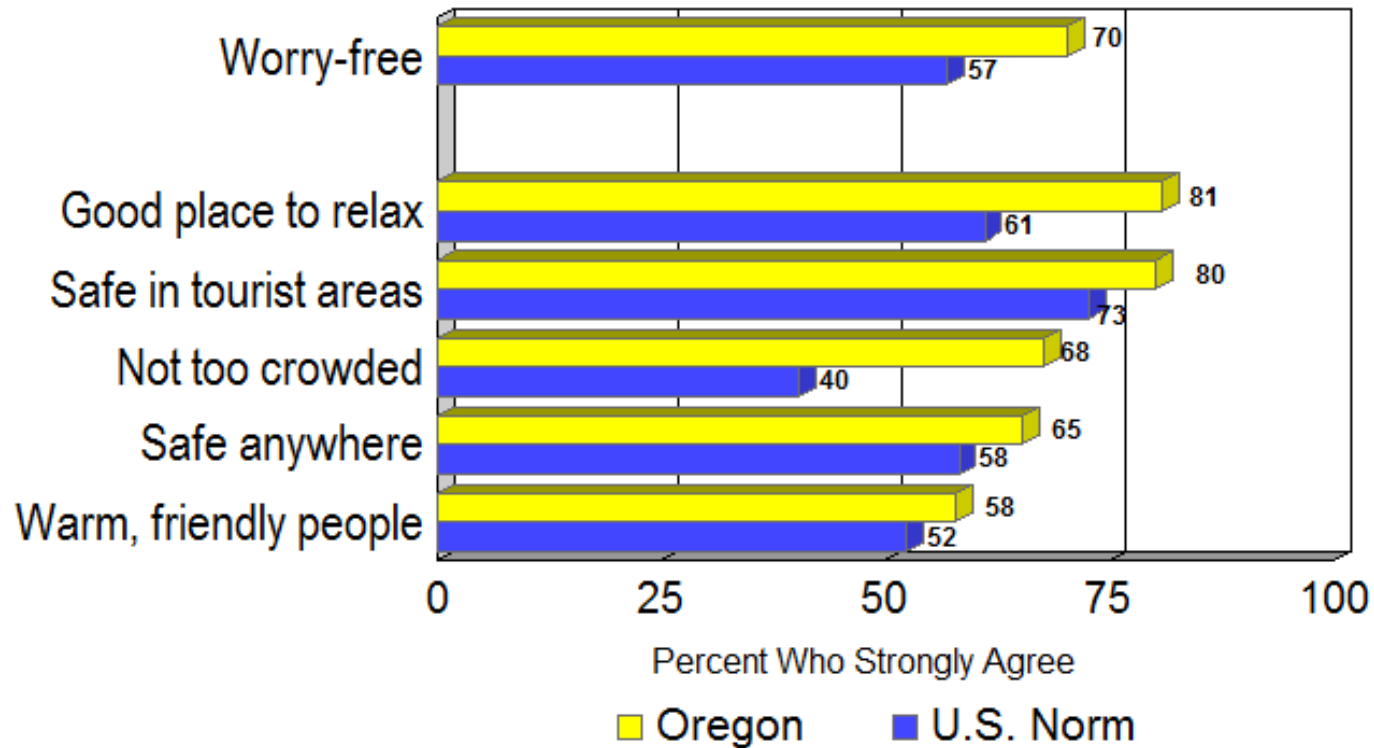
Base: 2006 Overnight Marketable Trips



Worry-free



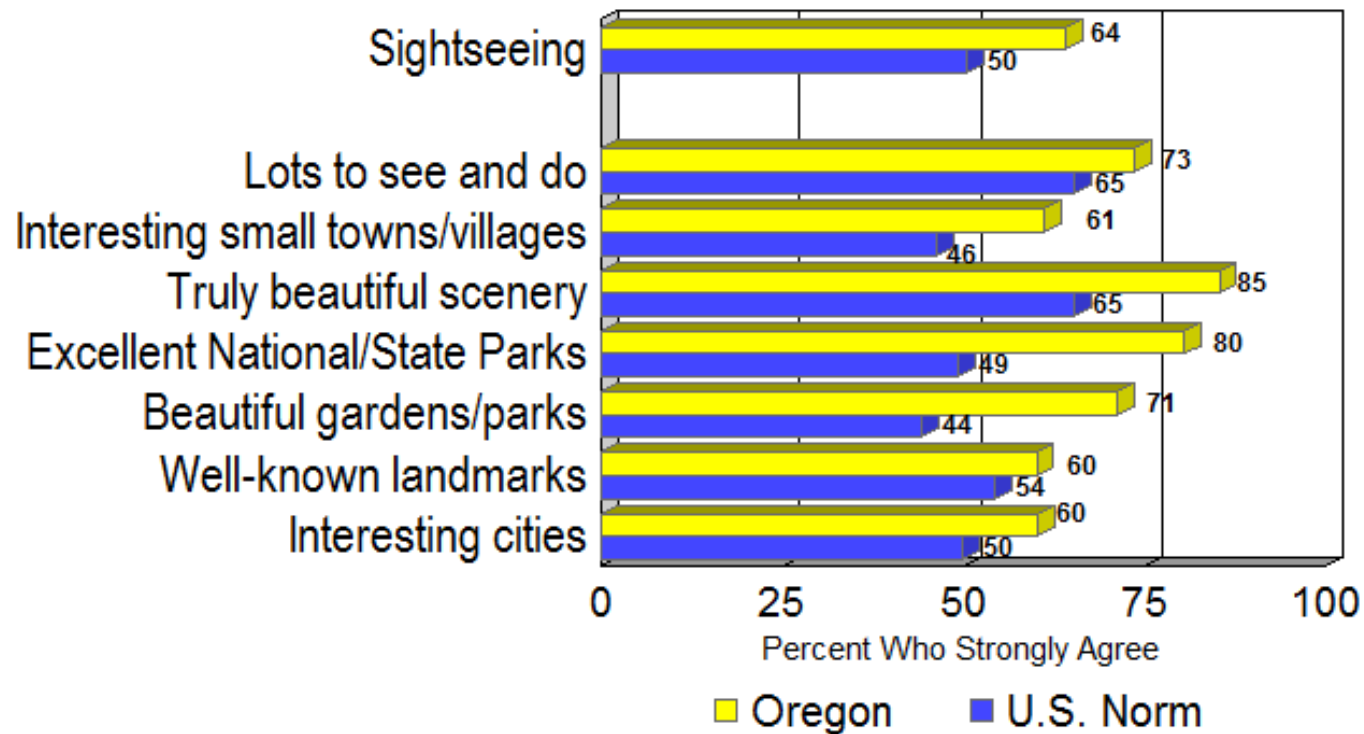
Base: 2006 Overnight Marketable Trips



Sightseeing



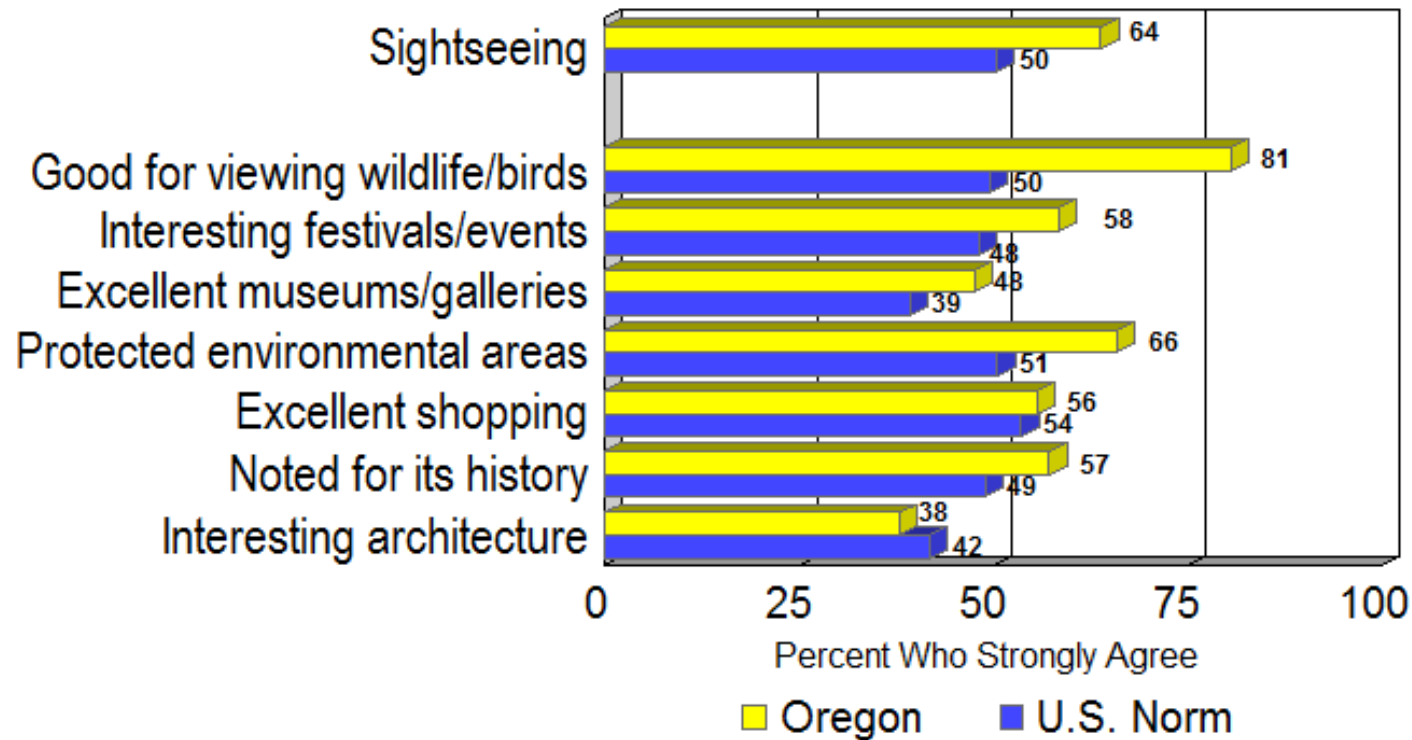
Base: 2006 Overnight Marketable Trips



Sightseeing (Cont'd)



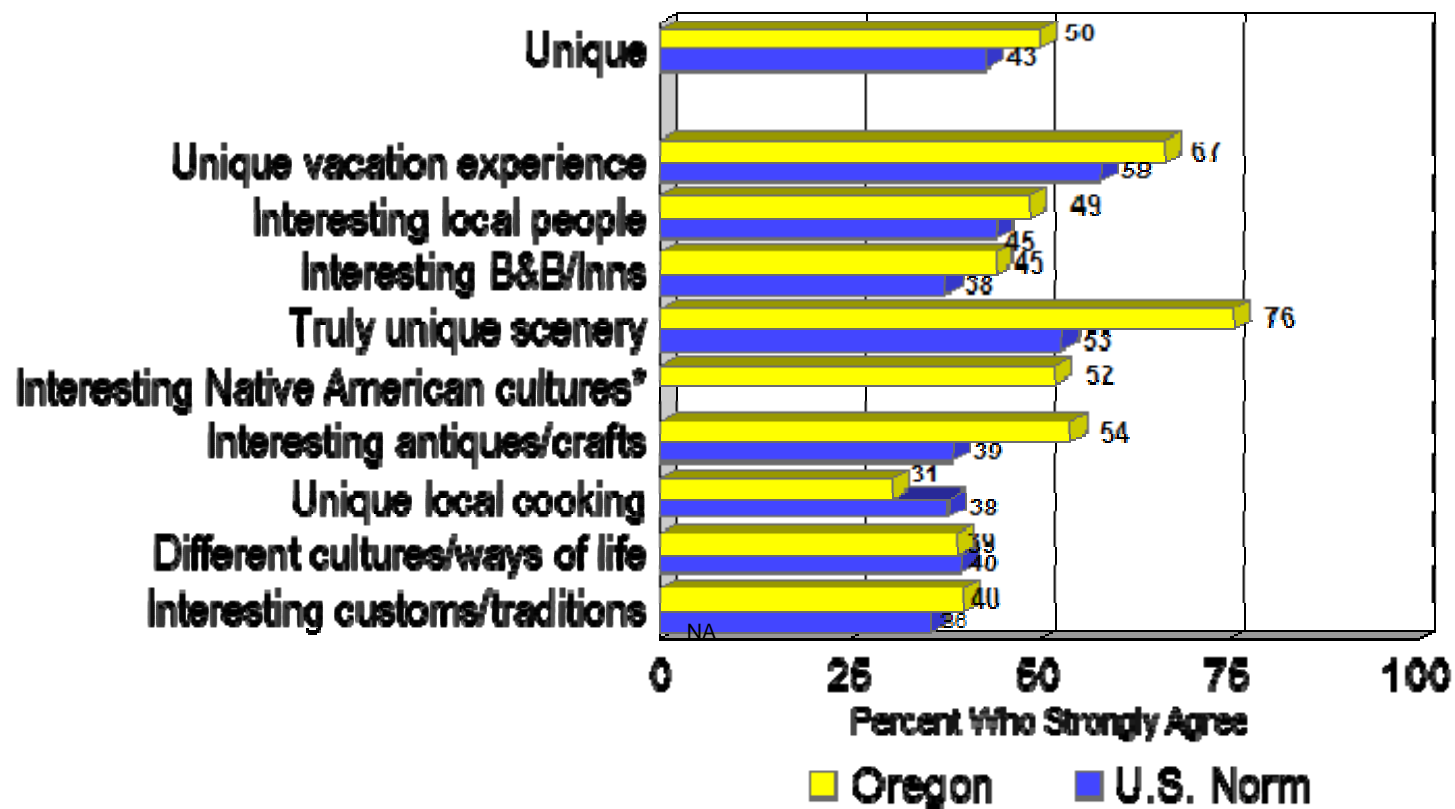
Base: 2006 Overnight Marketable Trips



Unique



Base: 2006 Overnight Marketable Trips



* No U.S. Norm available; excluded from overall "Unique" average for Oregon

Sports & Recreation



Base: 2006 Overnight Marketable Trips

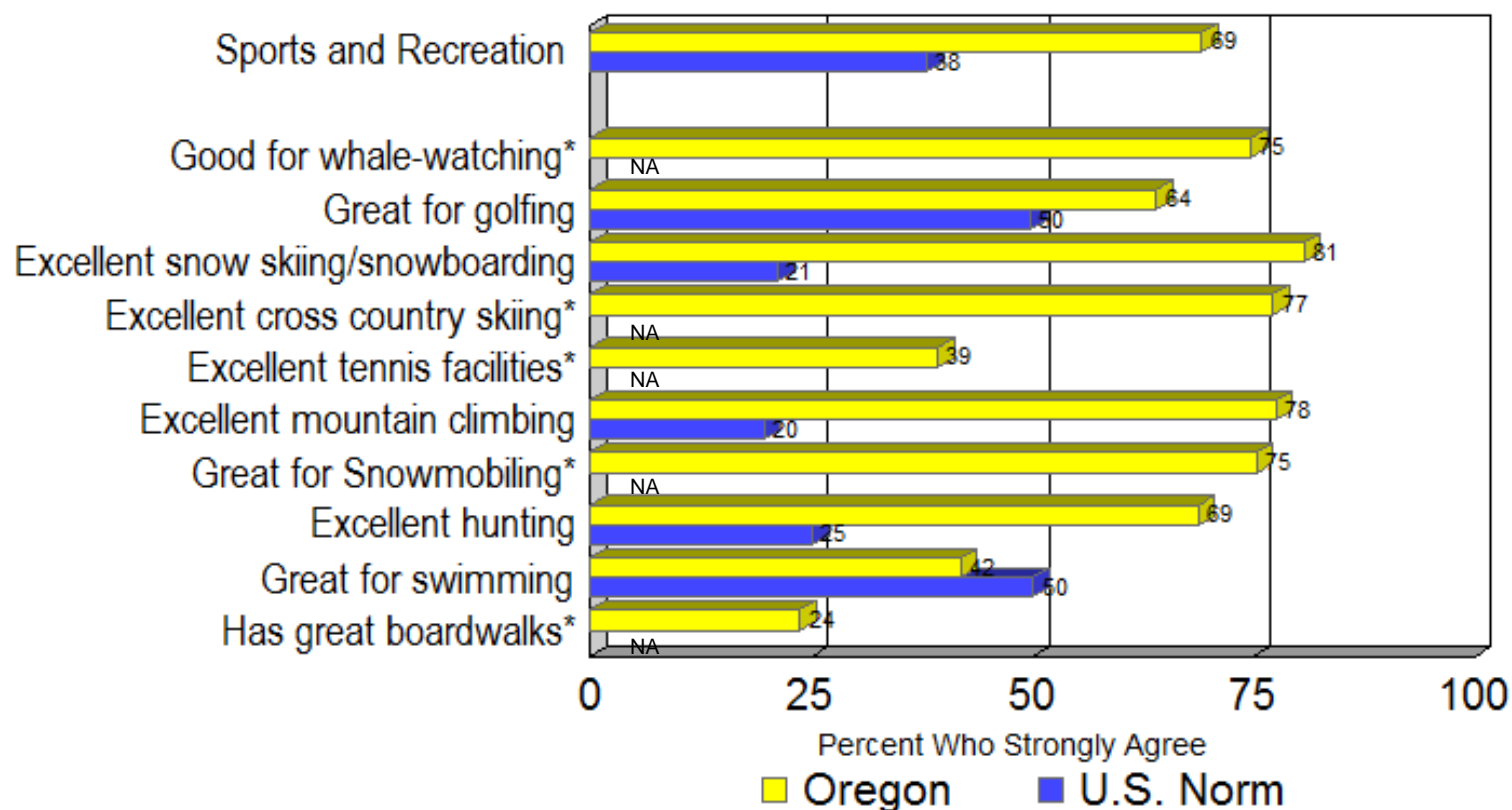


* No U.S. Norm available; excluded from overall "Sports & Recreation" average for Oregon

Sports & Recreation (Cont'd)



Base: 2006 Overnight Marketable Trips

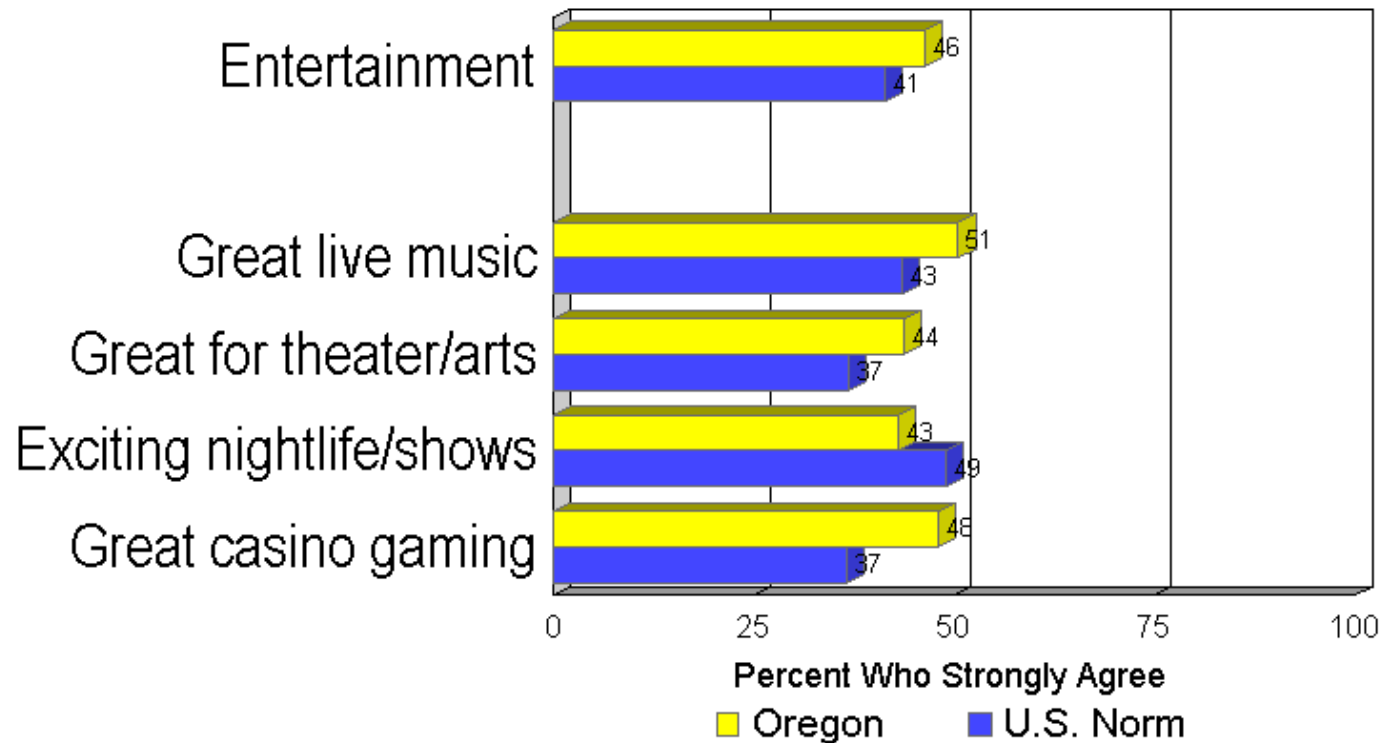


* No U.S. Norm available; excluded from overall "Sports & Recreation" average for Oregon

Entertainment



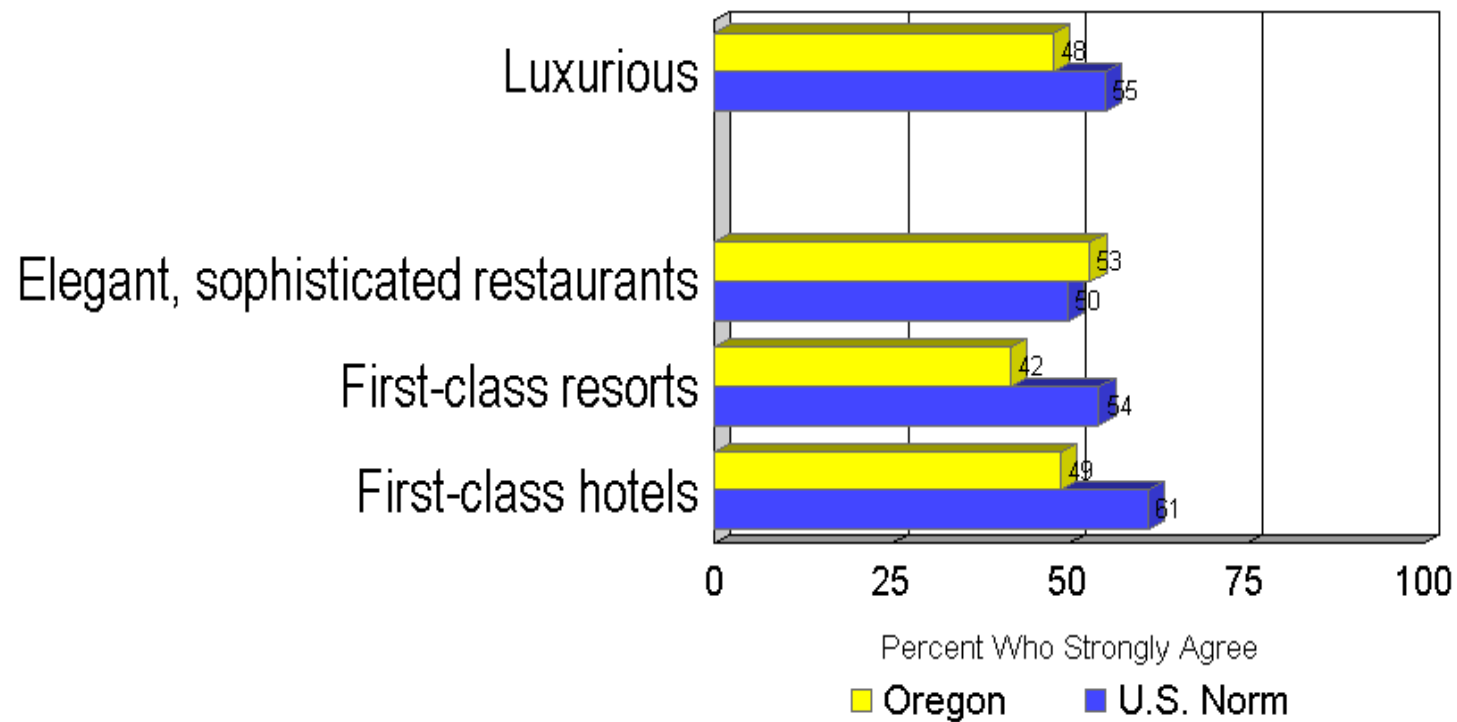
Base: 2006 Overnight Marketable Trips



Luxurious



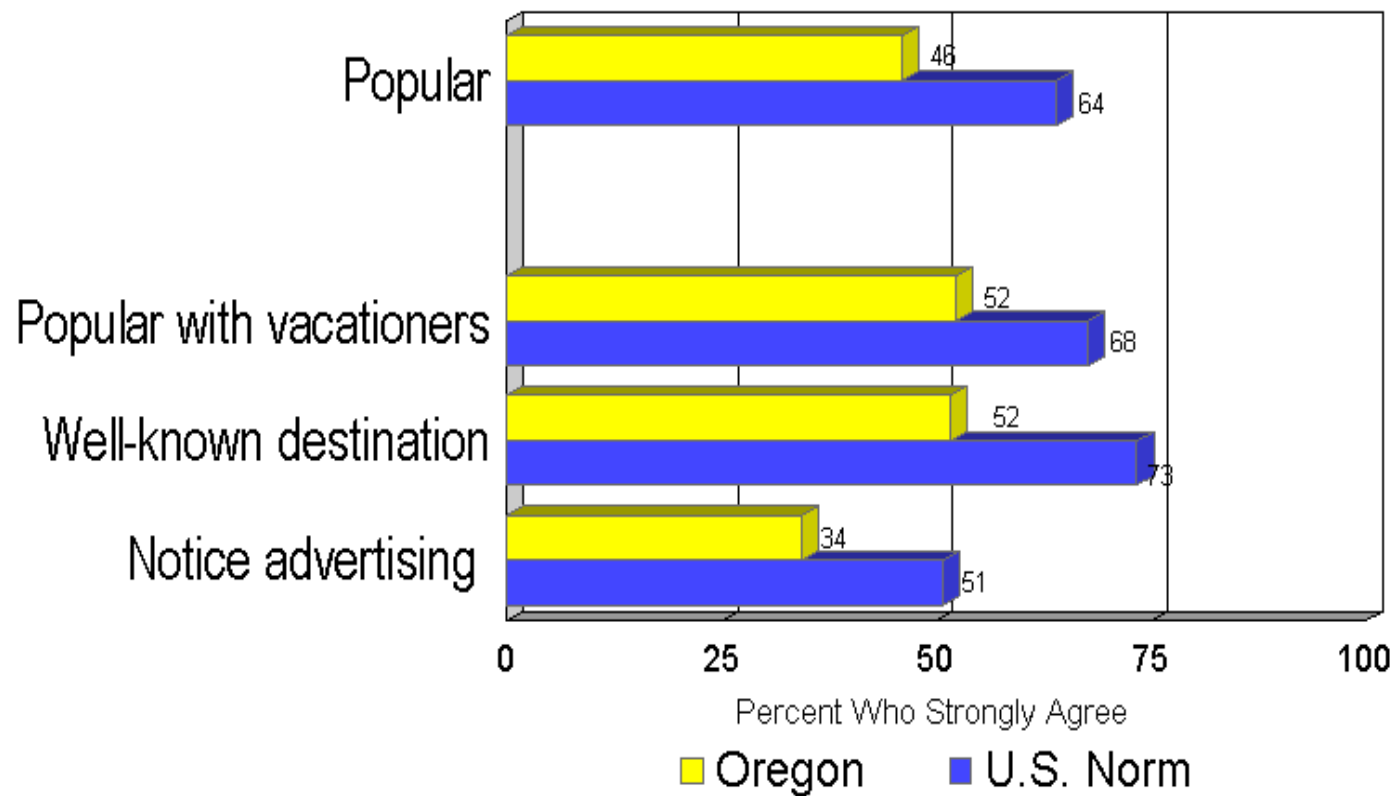
Base: 2006 Overnight Marketable Trips



Popular



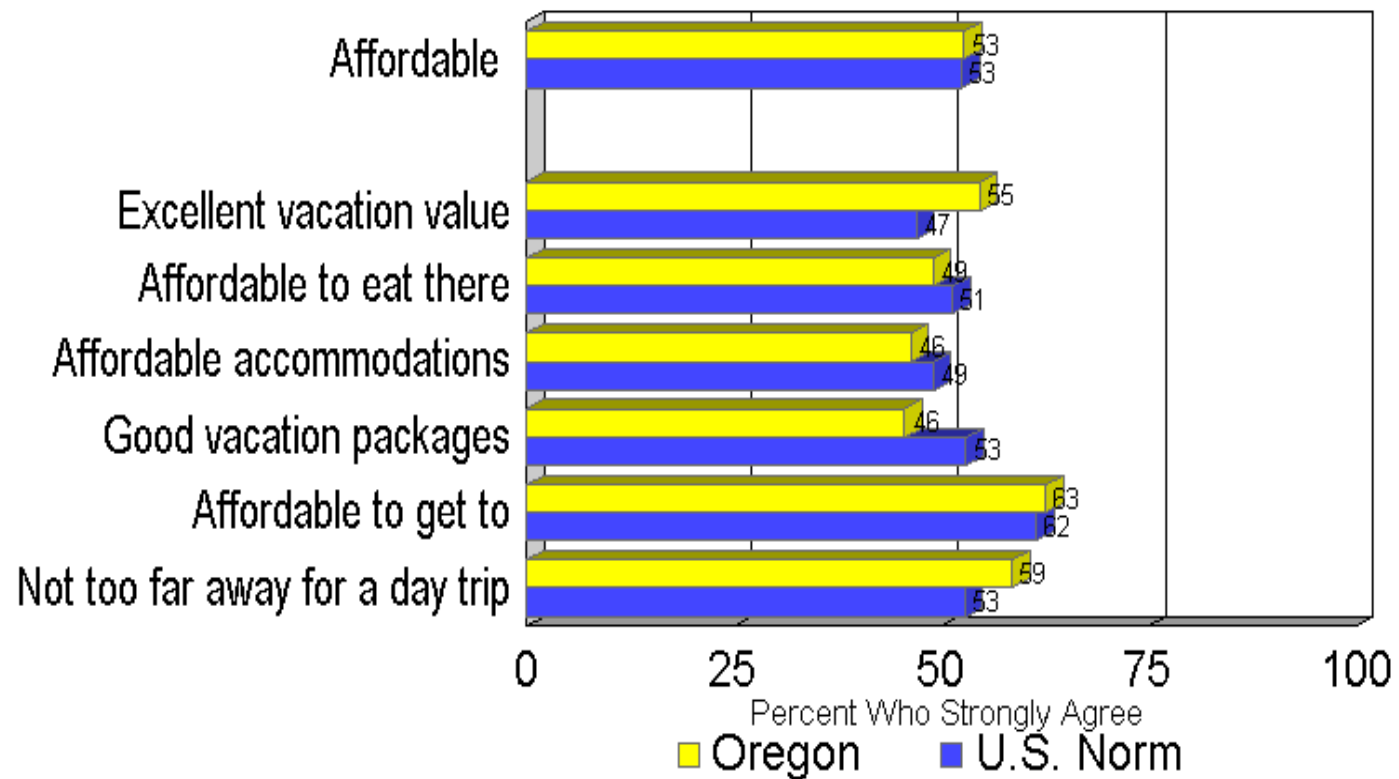
Base: 2006 Overnight Marketable Trips



Affordable



Base: 2006 Overnight Marketable Trips

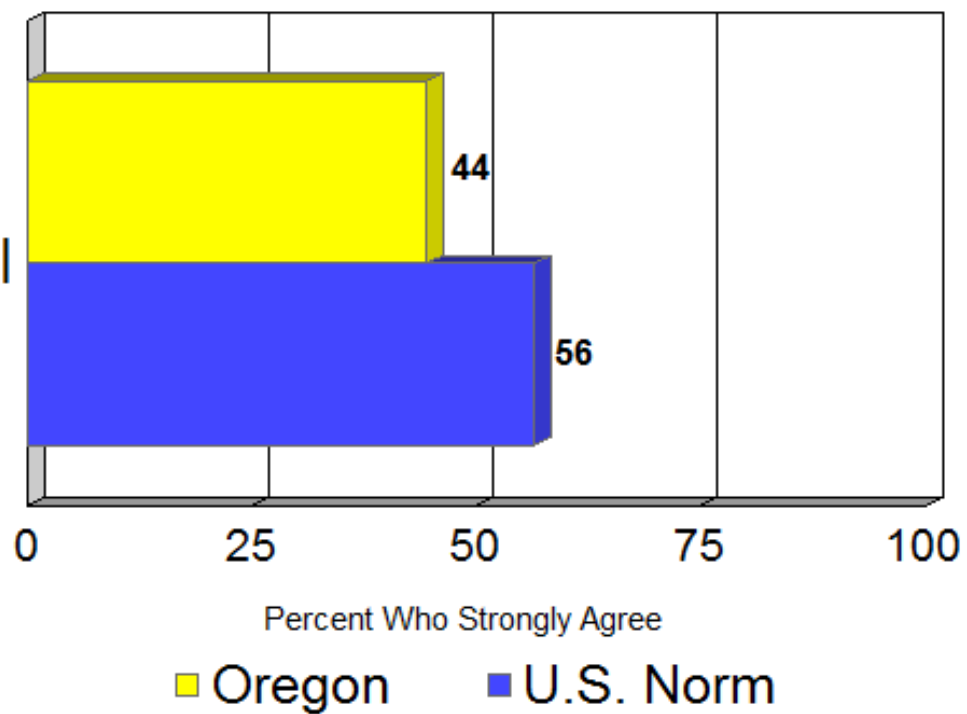


Climate



Base: 2006 Overnight Marketable Trips

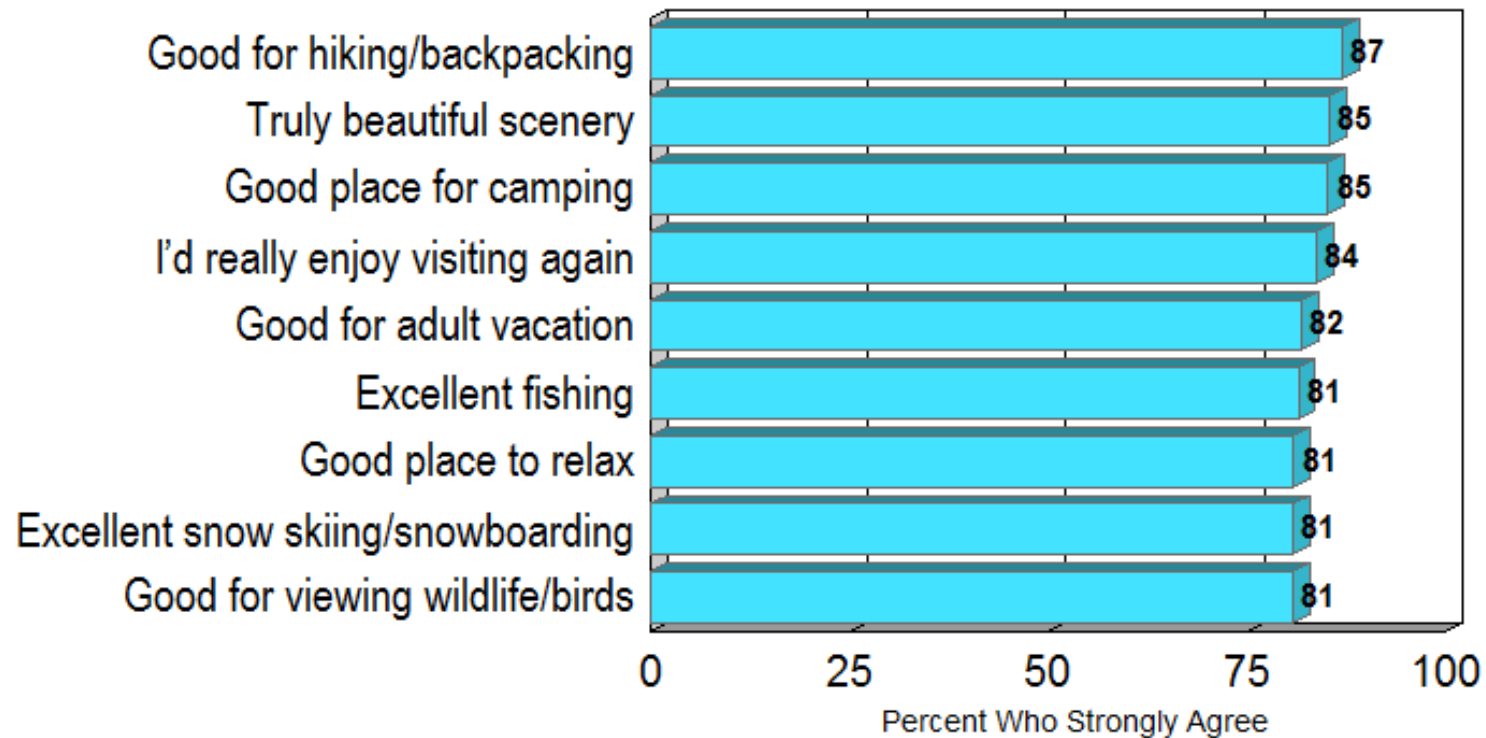
Excellent climate overall



Oregon's Image Strengths



Base: 2006 Overnight Marketable Trips



Oregon's Image Strengths (Cont'd)



Base: 2006 Overnight Marketable Trips

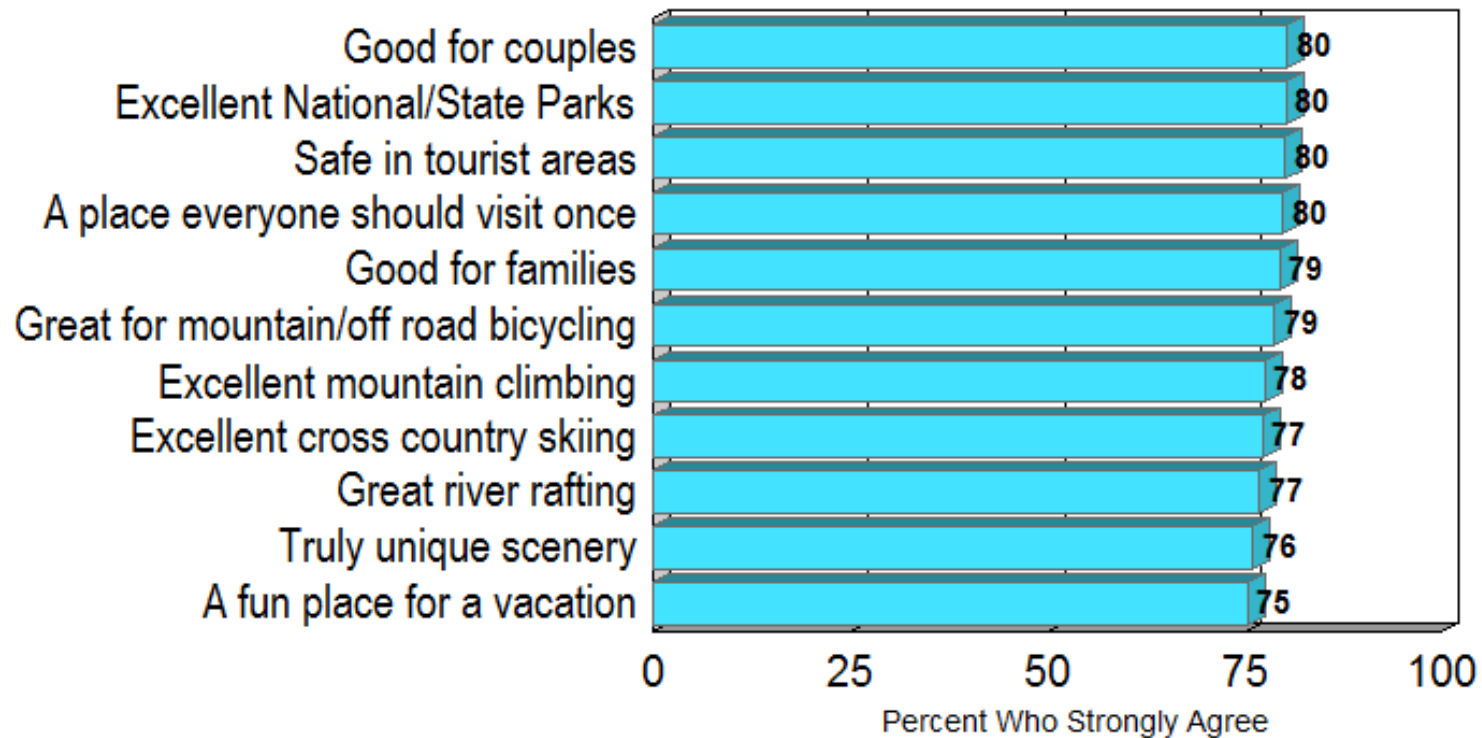
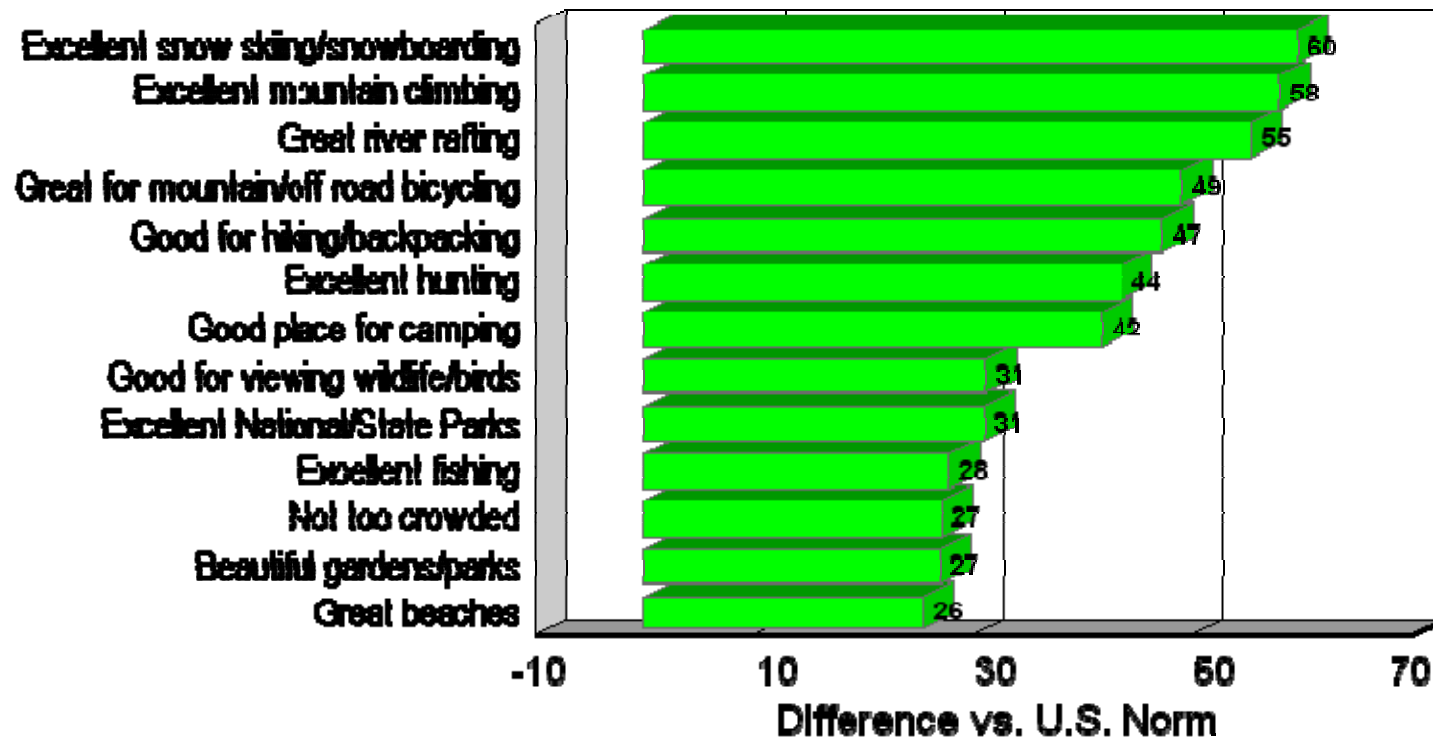


Image Strengths vs. U.S. Norms*



Base: 2006 Overnight Marketable Trips



* Includes only attributes with US Norms

Image Strengths vs. U.S. Norms (Cont'd)



Base: 2006 Overnight Marketable Trips

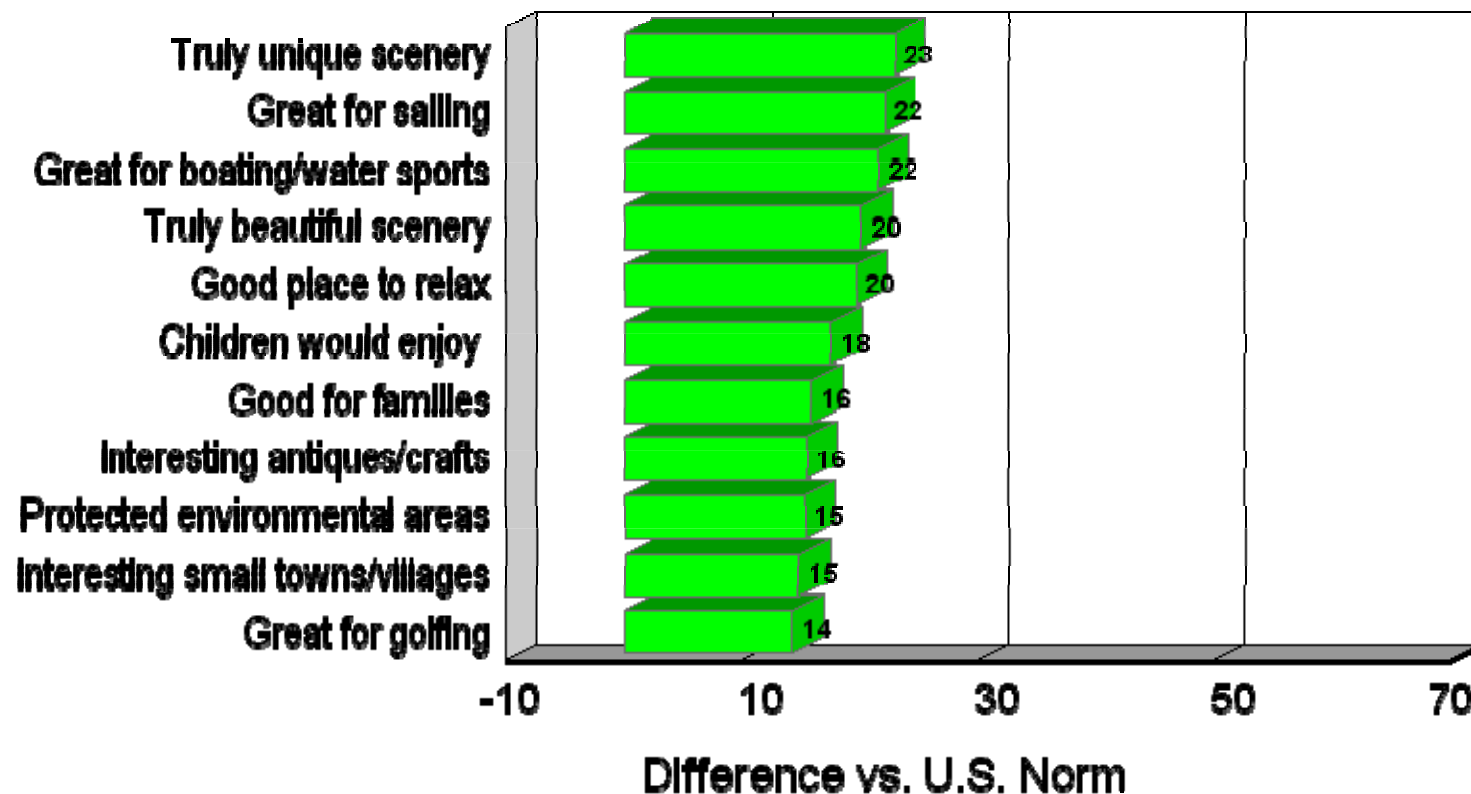


Image Strengths vs. U.S. Norms (Cont'd)



Base: 2006 Overnight Marketable Trips

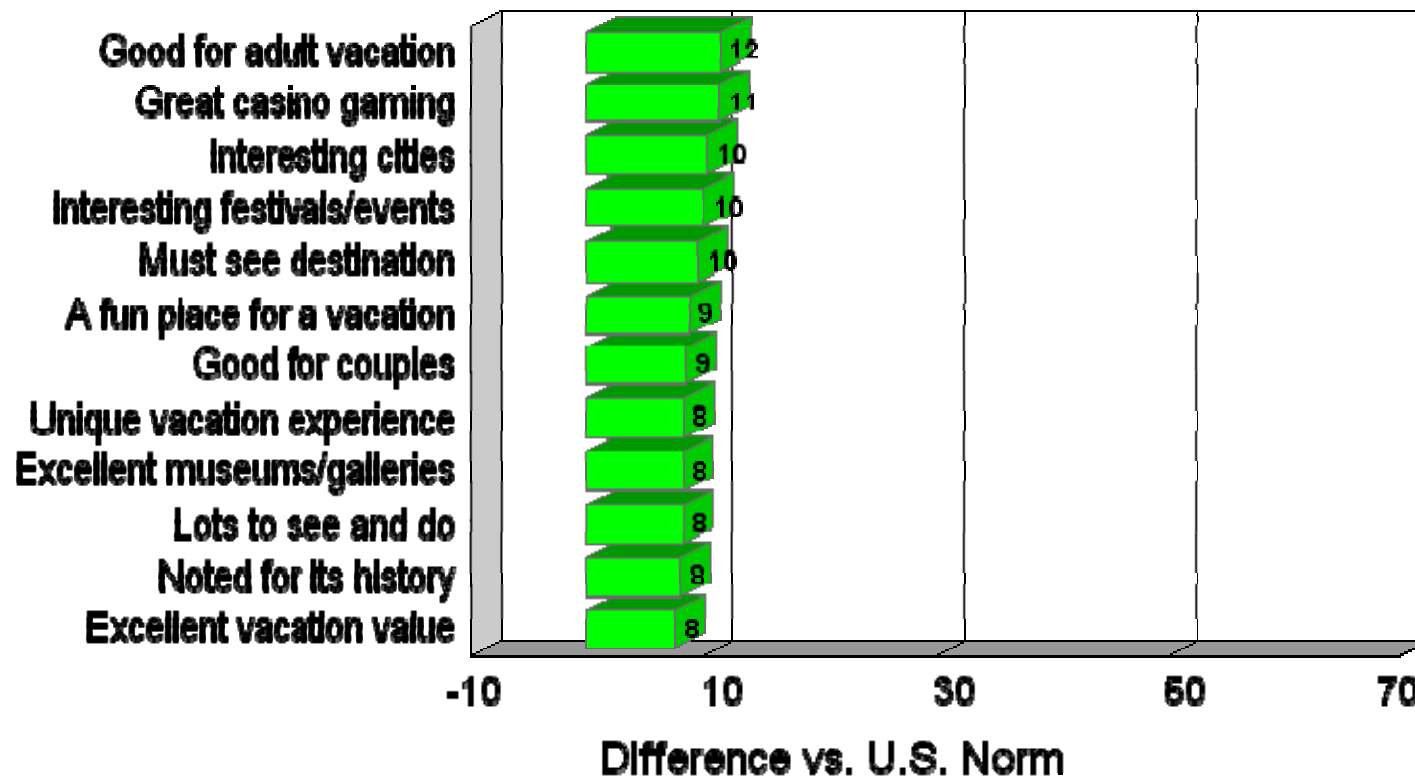


Image Strengths vs. U.S. Norms (Cont'd)



Base: 2006 Overnight Marketable Trips

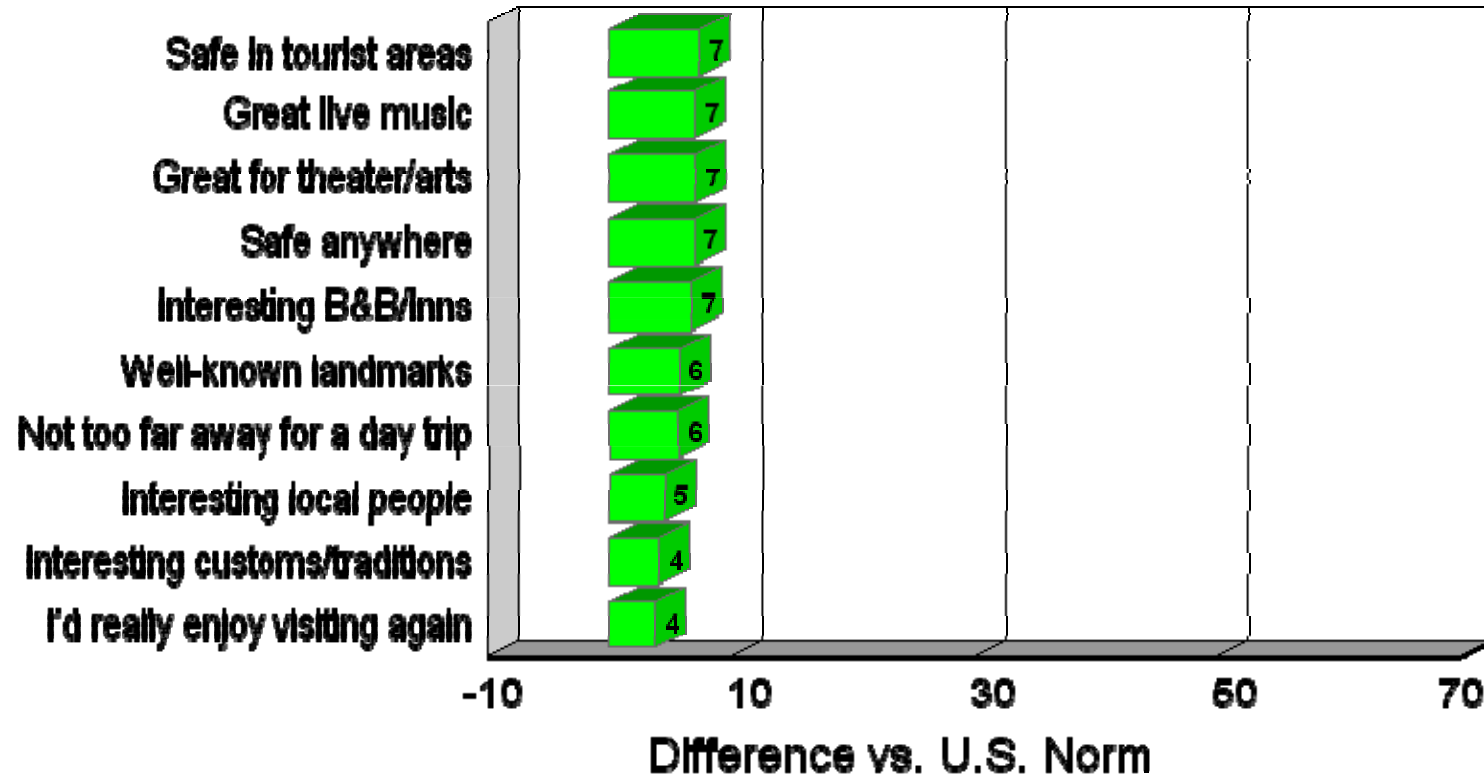


Image Weaknesses vs. U.S. Norms



Base: 2006 Overnight Marketable Trips

