



Oregon 2009
Regional Visitor Research
Willamette Valley

Introduction



- ◉ Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- ◉ It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to hone in on key market segments of interest.
- ◉ This report provides:
 - ◉ *Estimates of 2009 overnight visitor volume and travel expenditures for Oregon as well as for the Willamette Valley region in particular*
 - ◉ *Strategic intelligence about the Willamette Valley region's overnight travel market including:*
 - ◉ *key sources of business*
 - ◉ *visitor profiling*
 - ◉ *trip characteristics*

Methodology

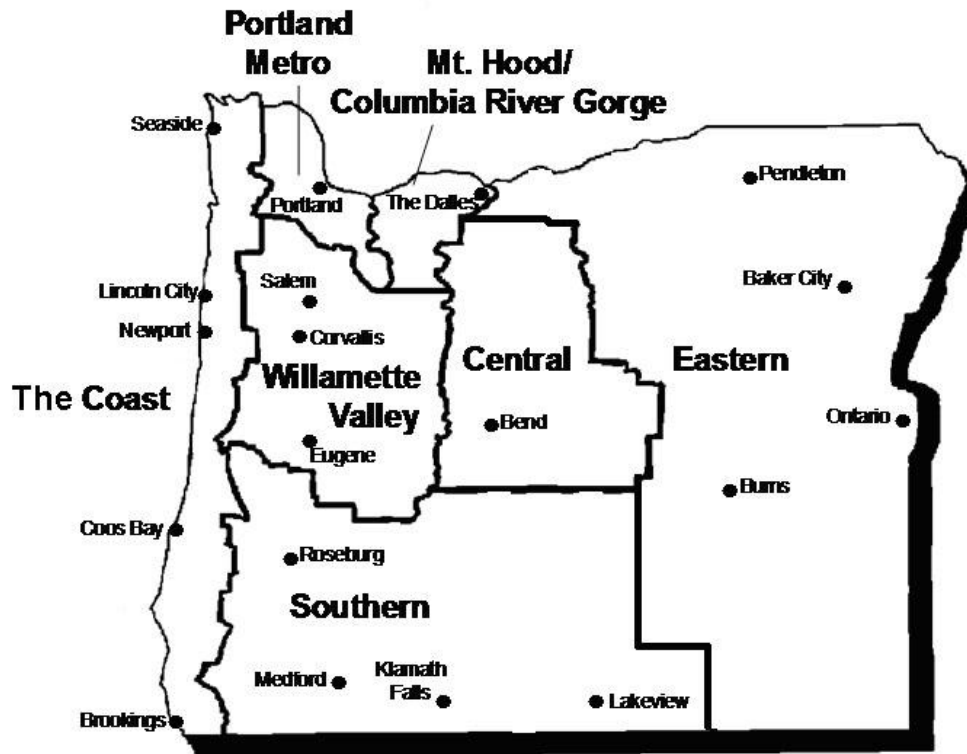


- For each of the 2008 and 2009 travel years, a representative sample of visitors to the Willamette Valley was identified through Travel USA®.
- Respondents who visited Oregon were asked to identify which of the state's 7 tourism regions they spent time in with the aid of a visual map.
- Of the survey sample of 4,682 overnight trips taken to Oregon in 2008 and 2009:
 - *727 included a visit to the Willamette Valley region.*
 - *Of those, 223 were **marketable trips**.*

Map



OREGON REGIONS



Analytical Note



- The results in this report are based on 2 time frames:
 - Market size and structure estimates for the Willamette Valley are reported for the most current travel year (2009), as are all Oregon state norms.
 - To maximize statistical reliability, other Willamette Valley data (trip characteristics and visitor profiles) are based on two years' combined sample from the 2008 and 2009 studies.

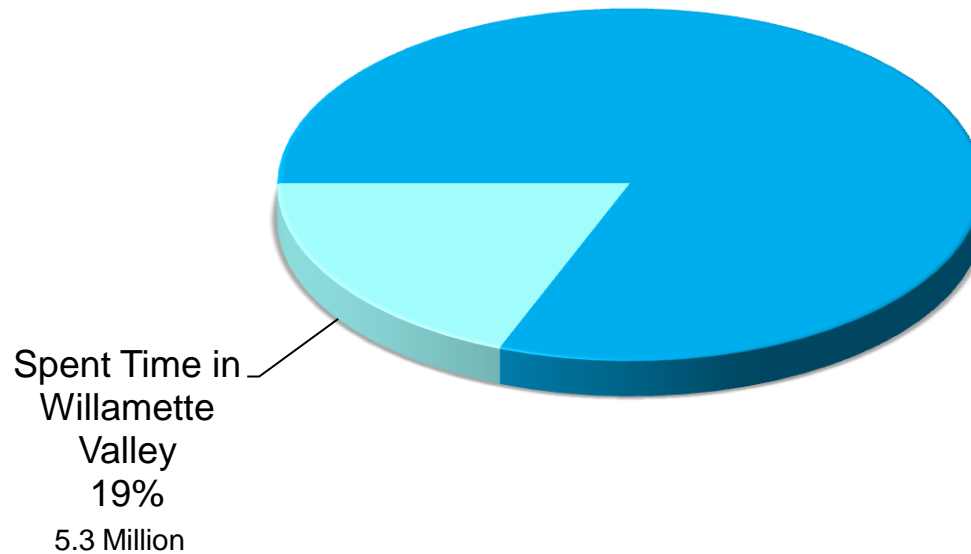


Travel Market Size & Structure — 2009

Size of Willamette Valley's Overnight Travel Market in 2009



Total Overnight Trips to Oregon* = 27.5 Million

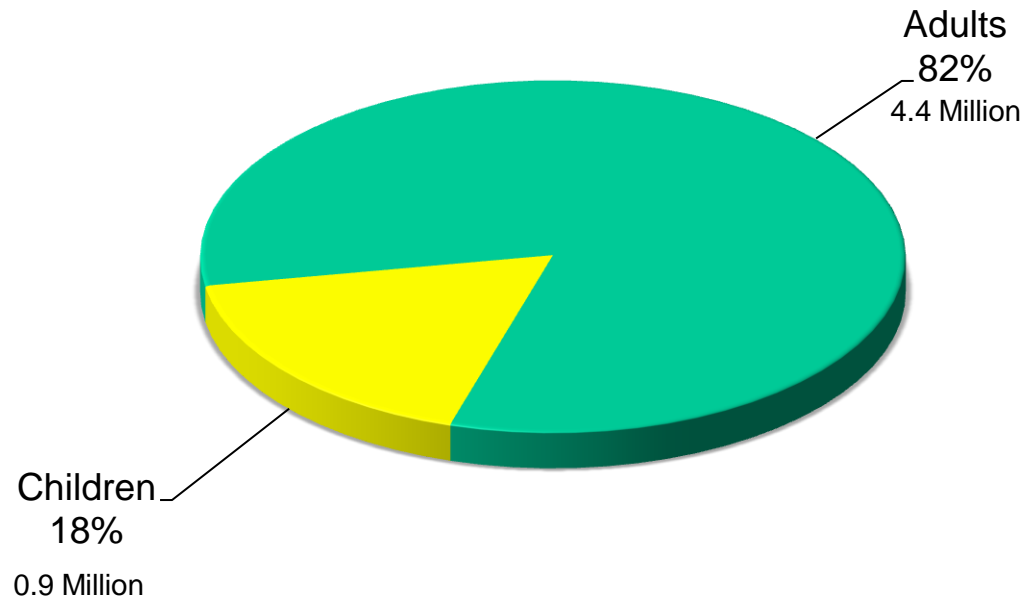


* Includes adults and children

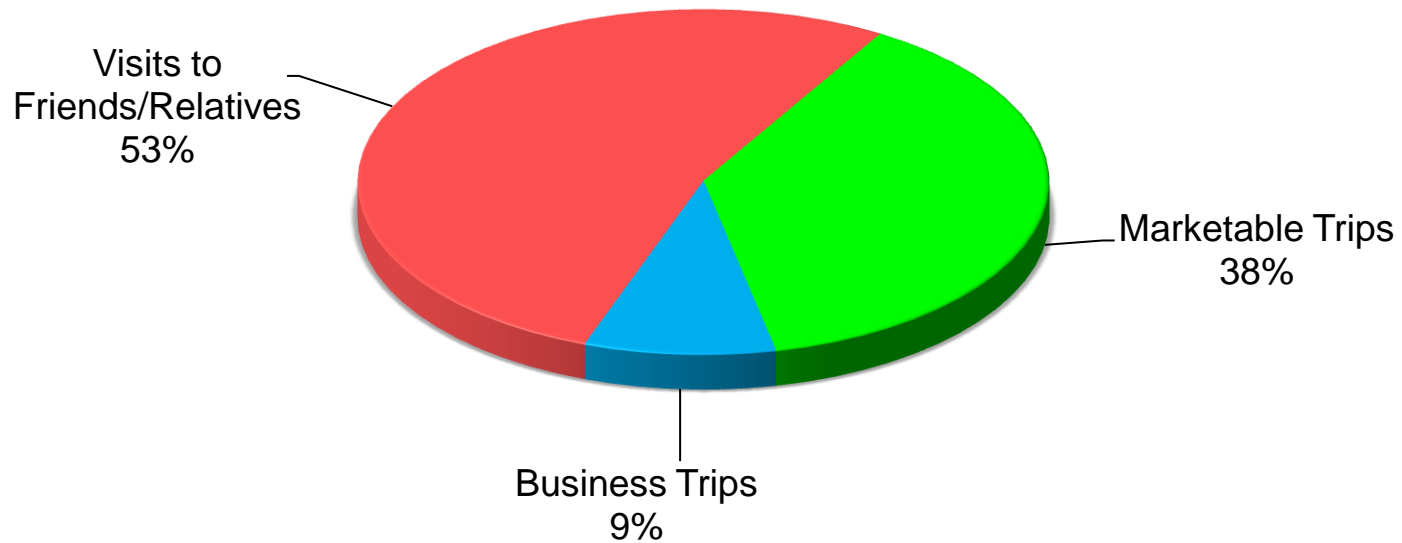
Willamette Valley's 2009 Overnight Travel Market – Adults vs. Children



Total Overnight Trips to Willamette Valley = 5.3 Million



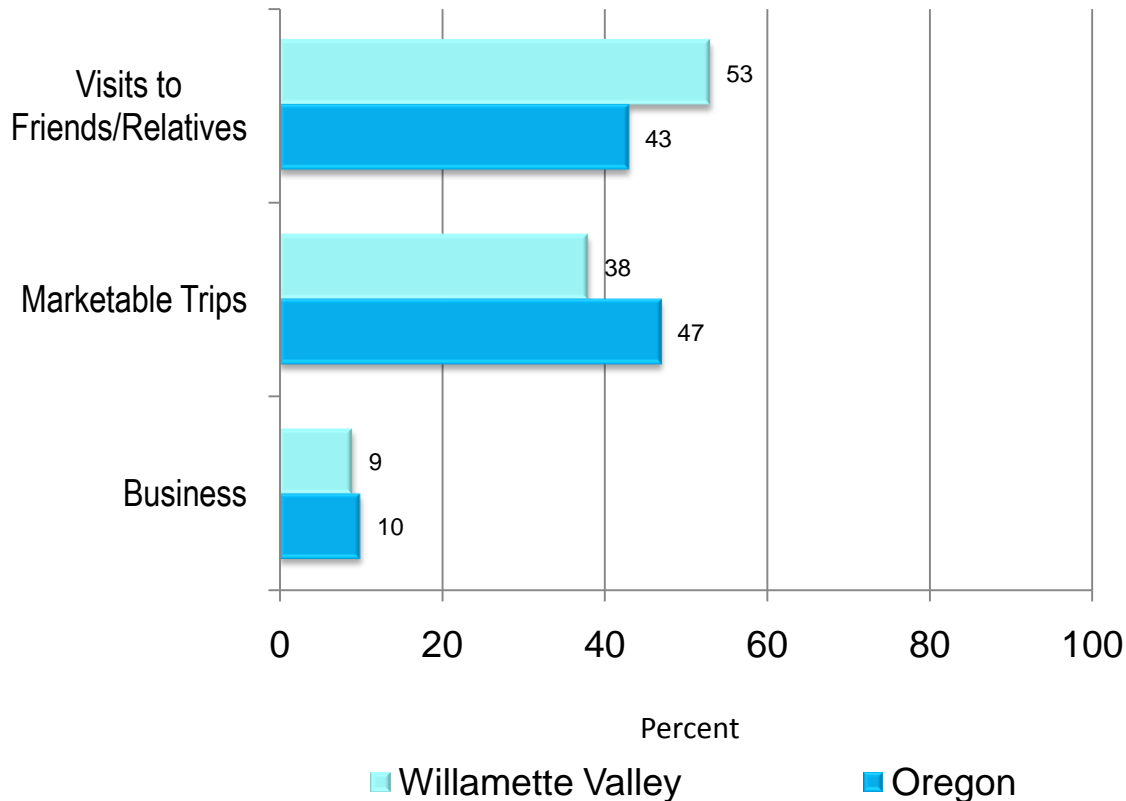
Willamette Valley's Overnight Travel Market by Trip Purpose



Purpose of Trip – Willamette Valley vs. Oregon State



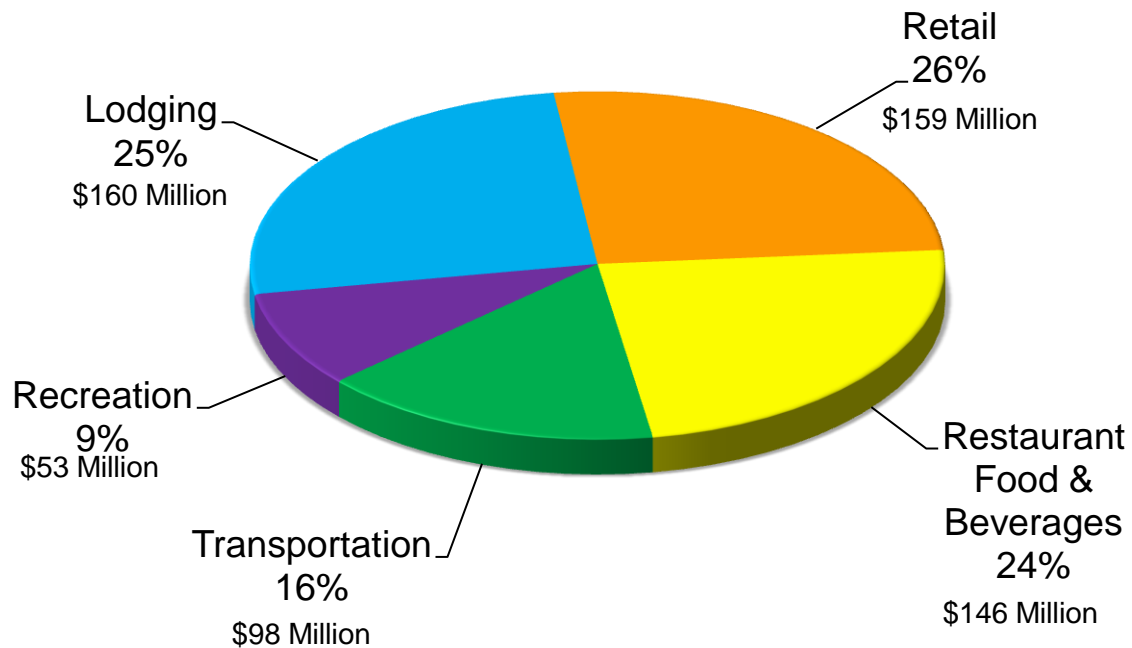
Base: 2009 Overnight Trips



2009 Overnight Spending – by Sector



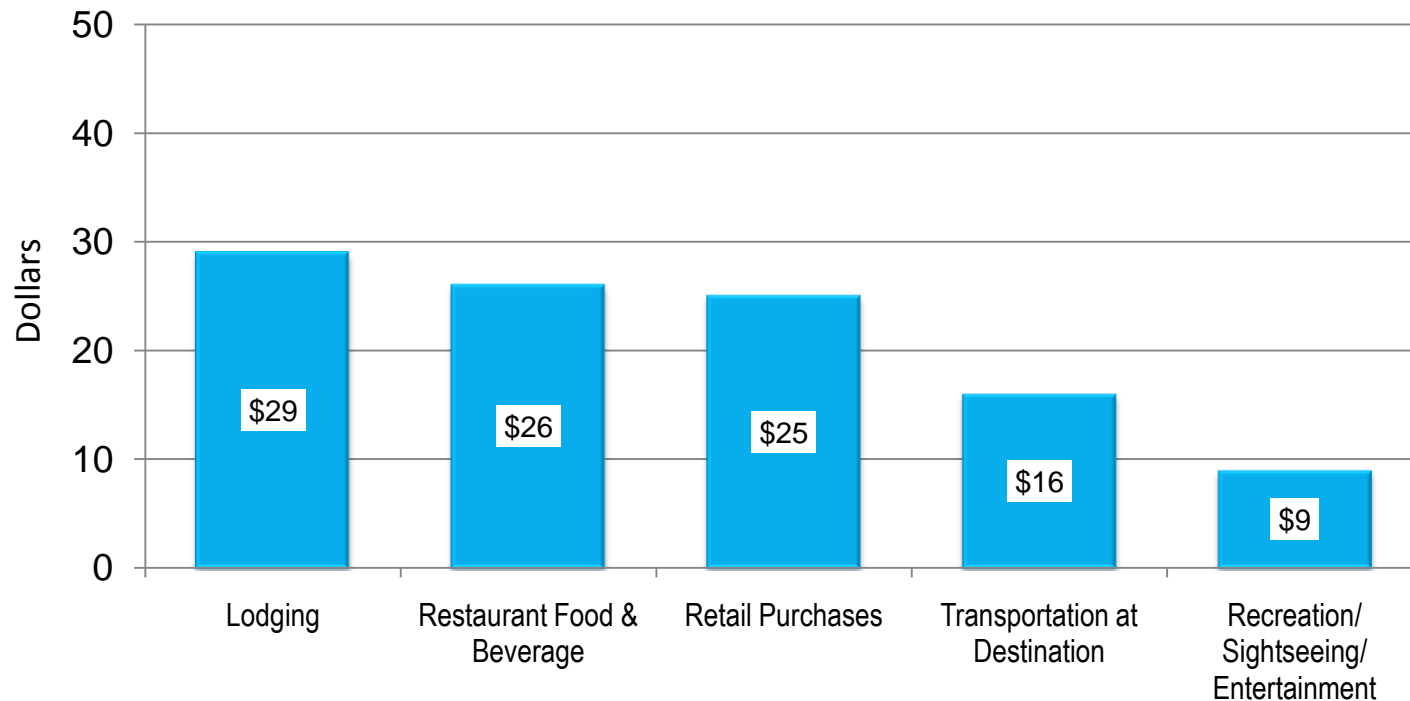
Total Spending in 2009 = \$616 Million



Average Per Person Expenditures on Overnight Trips — By Sector



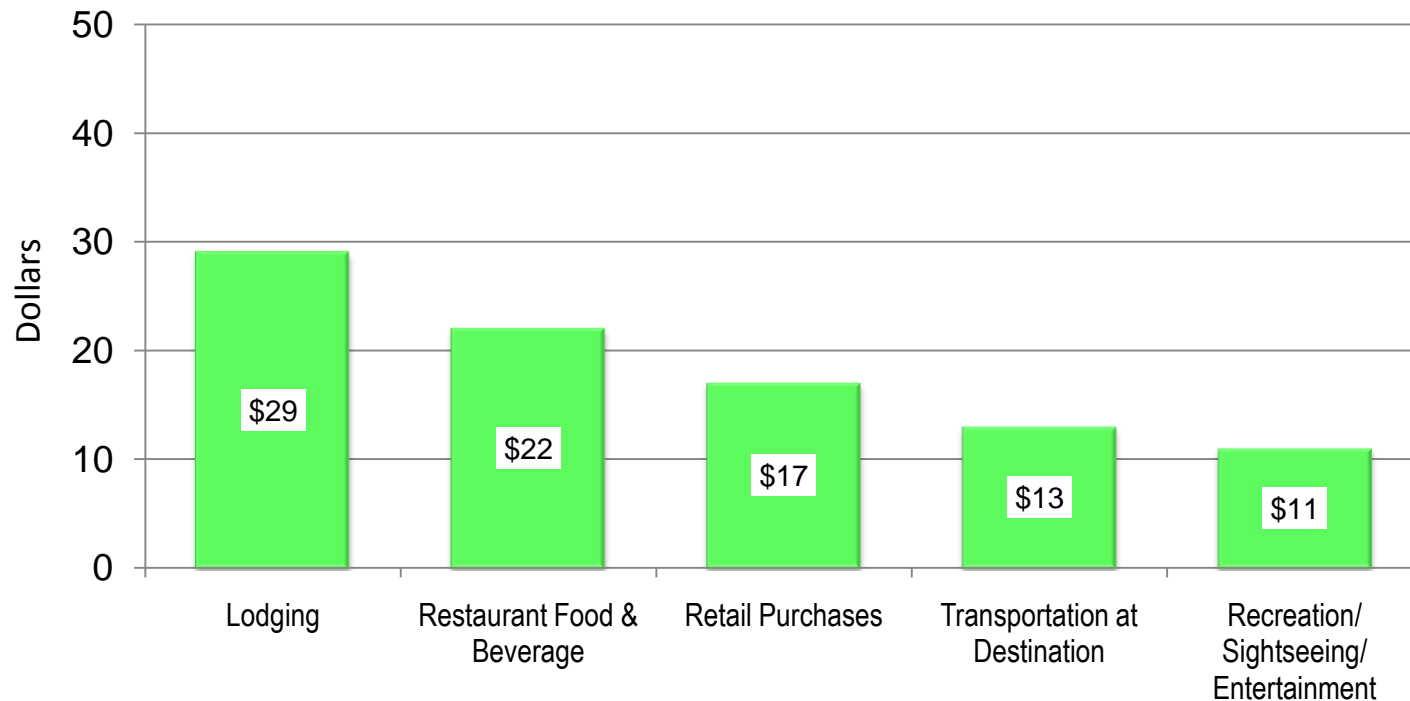
Base: 2009 Overnight Trips



Average Per Person Expenditures on Overnight Marketable Trips — By Sector



Base: 2009 Overnight Marketable Trips



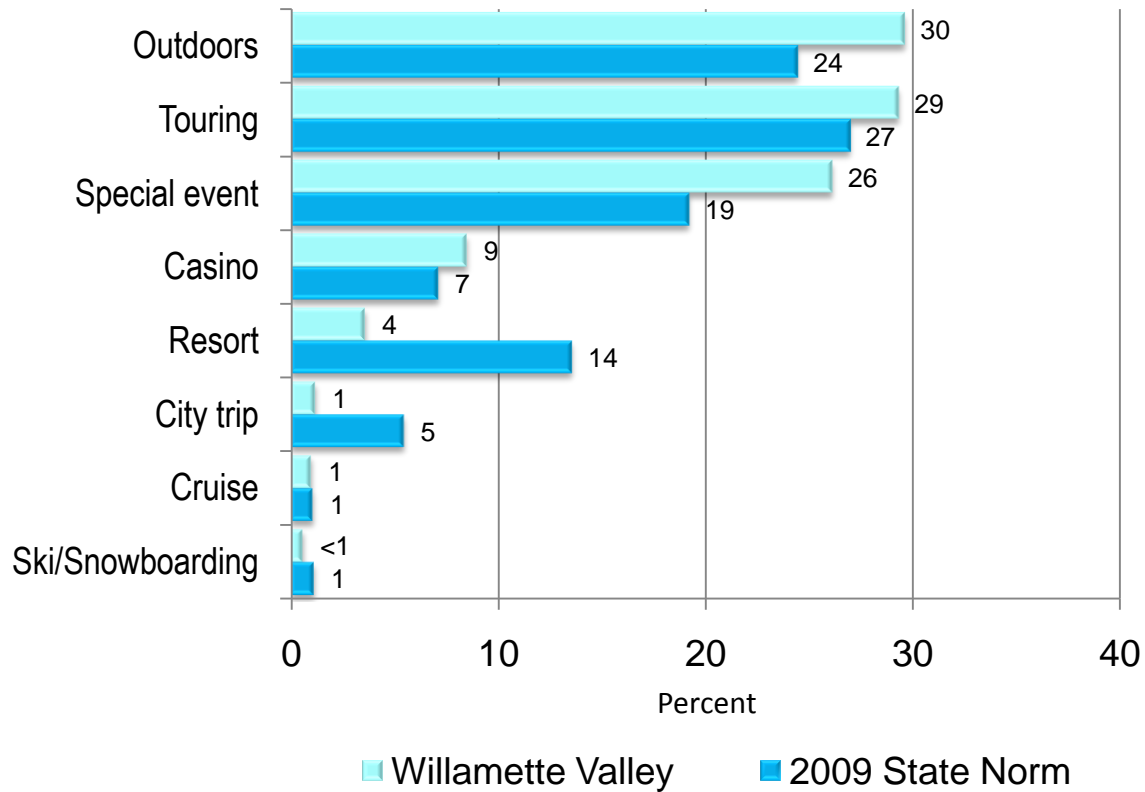


Marketable Trip Characteristics and Visitor Profile — 2008/2009

Main Purpose of Marketable Trip — Oregon vs. National Norm



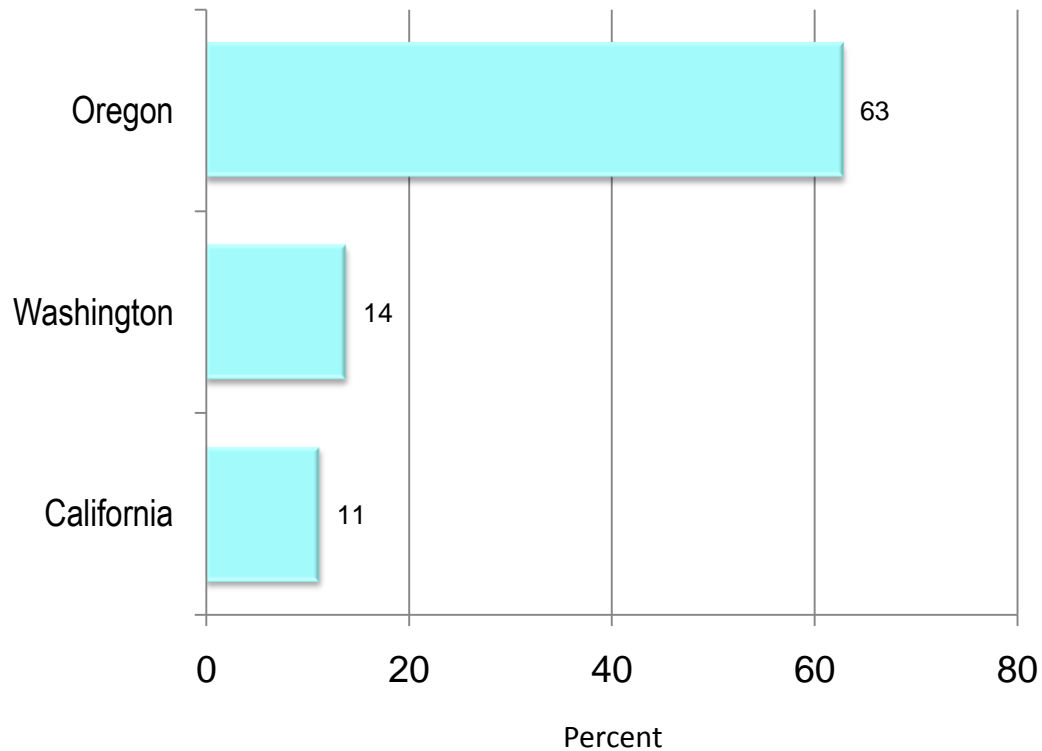
Base: Overnight Marketable Trips



State Origin Of Overnight Trip



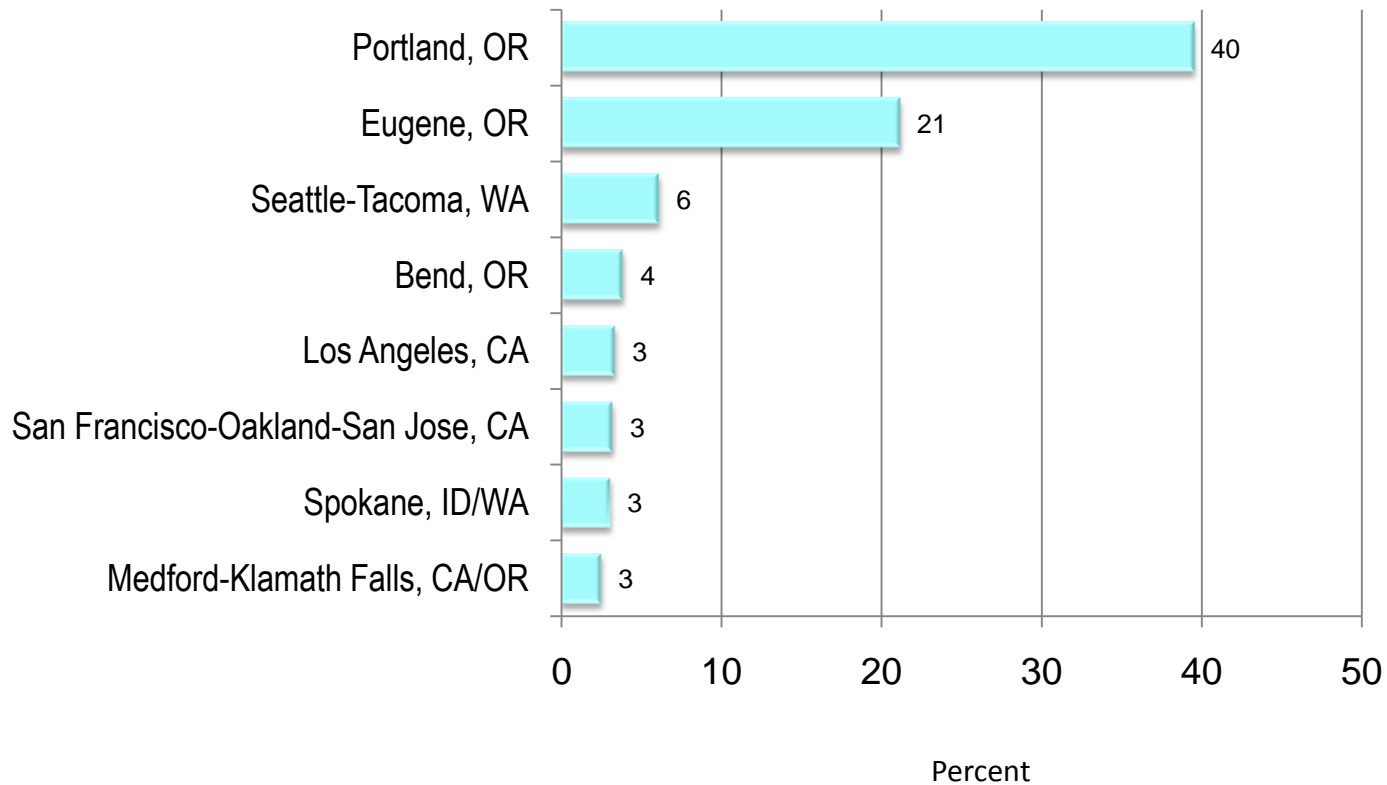
Base: Overnight Marketable Trips



DMA Origin Of Overnight Trip



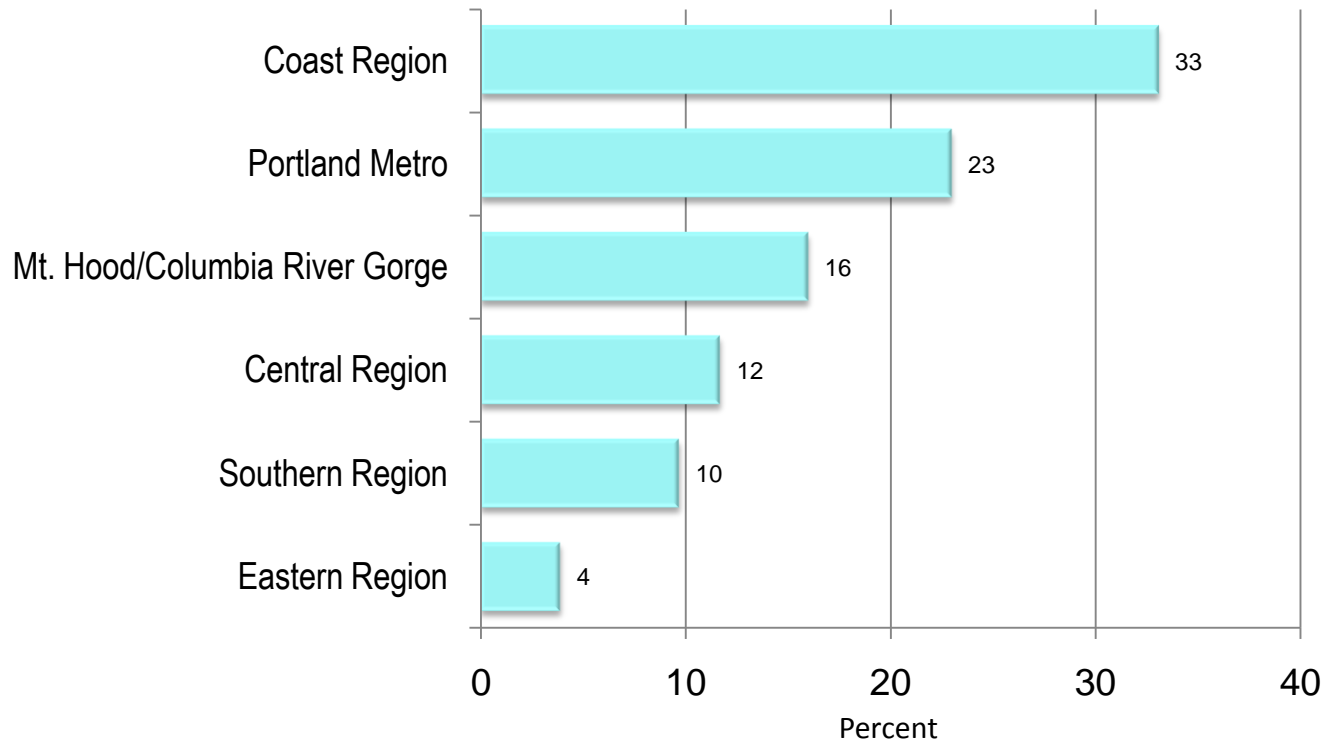
Base: Overnight Marketable Trips



Other Oregon Regions Visited on Willamette Valley Trip



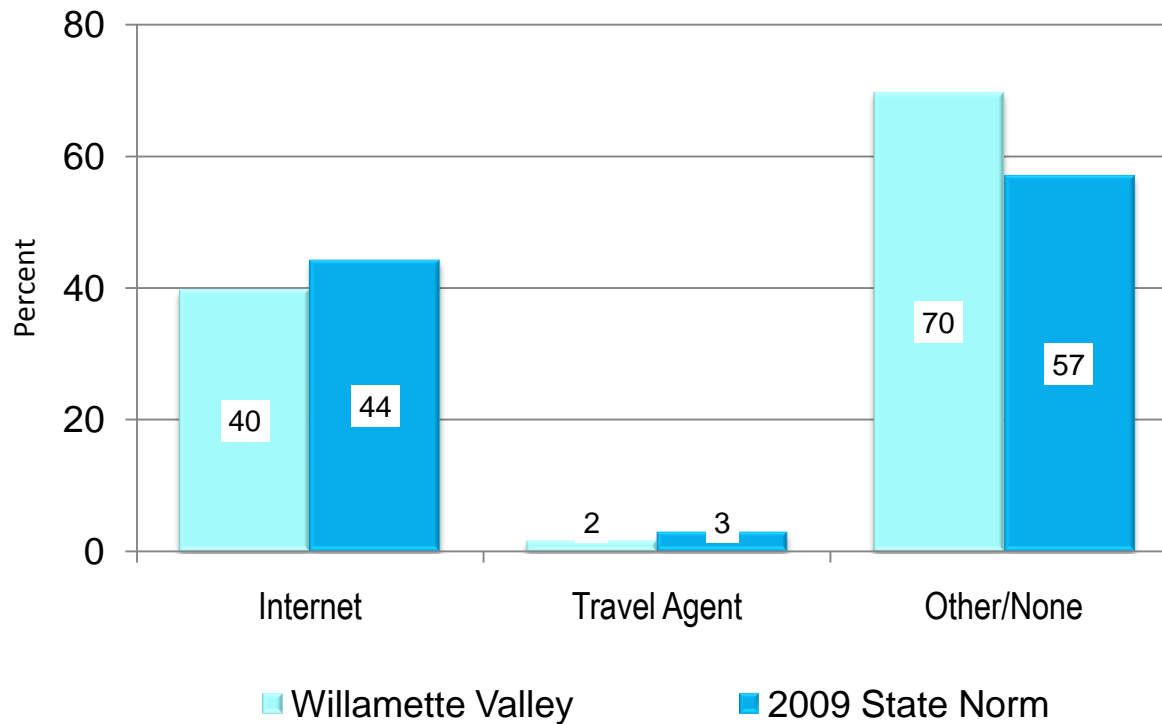
Base: Overnight Marketable Trips



Method of Planning Trip



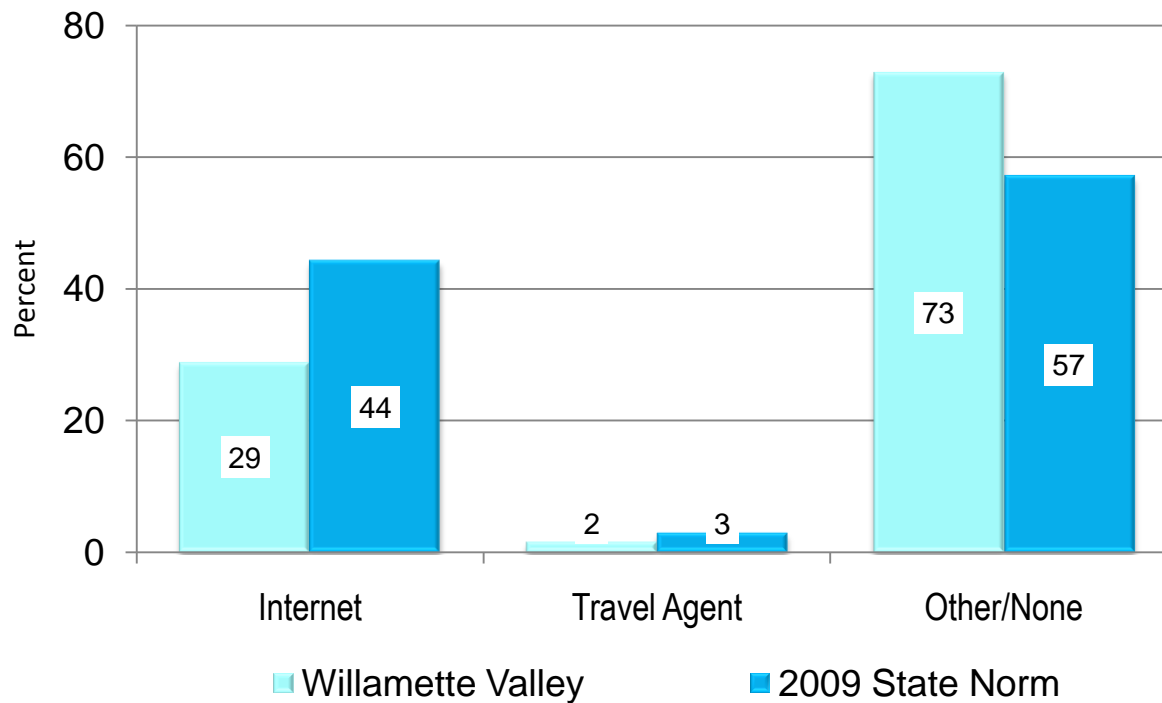
Base: Overnight Marketable Trips



Method of Booking Trip



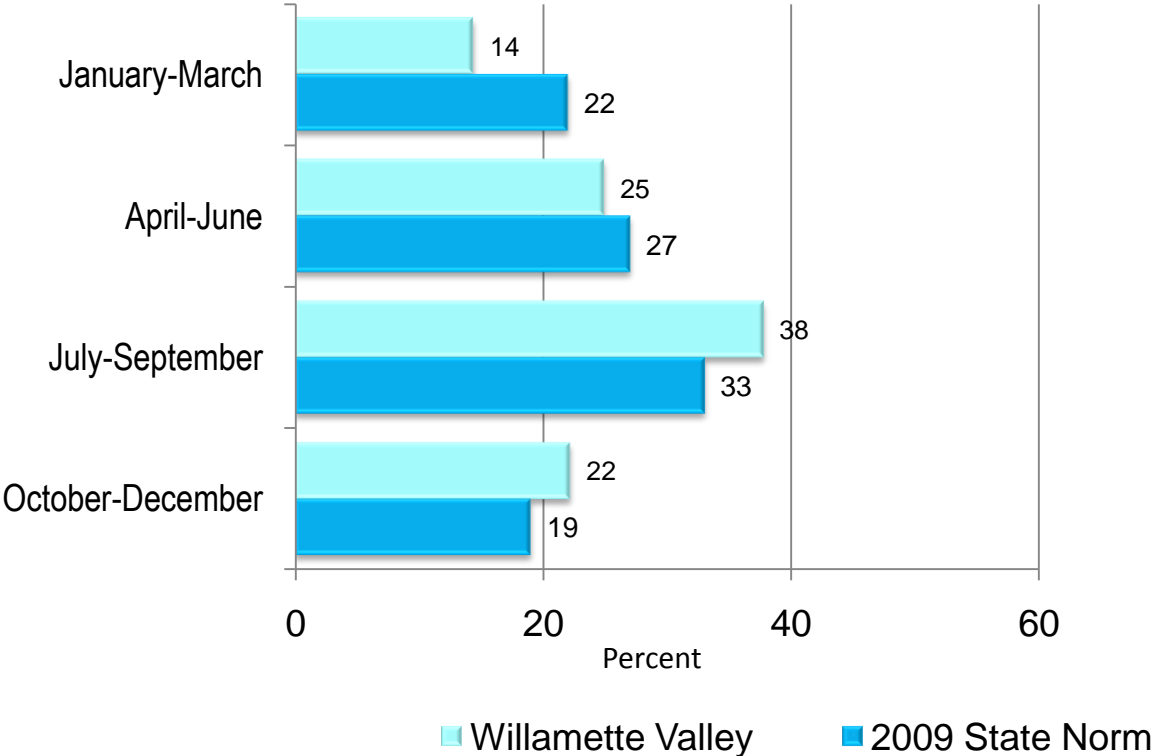
Base: Overnight Marketable Trips



Season of Trip



Base: Overnight Marketable Trips



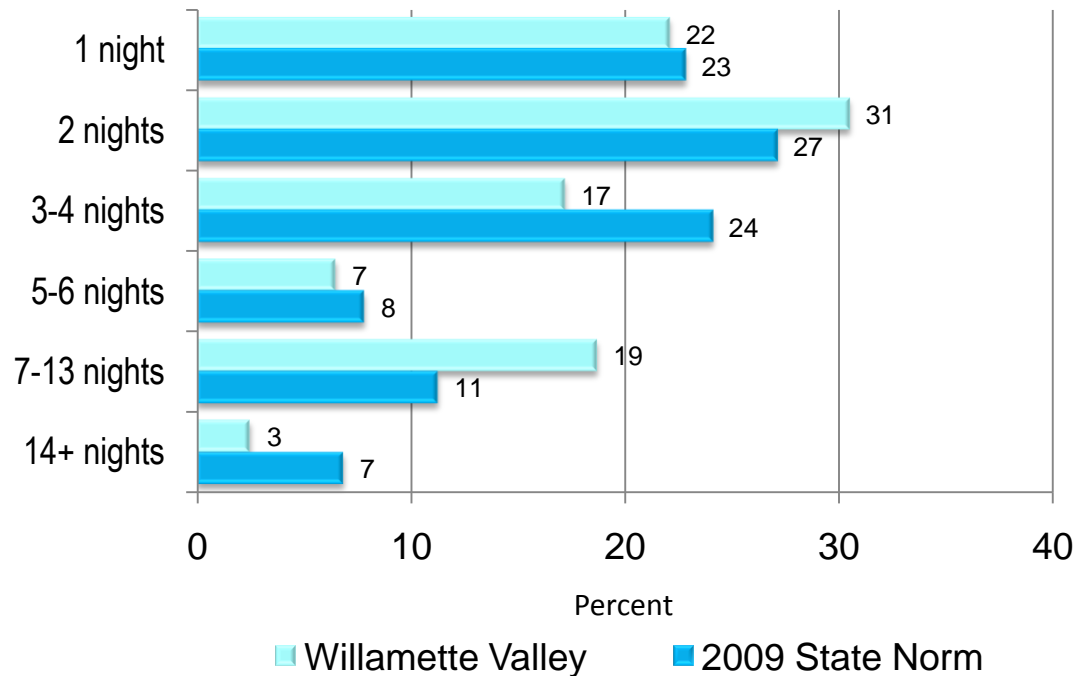
Total Nights Away on Trip



Base: Overnight Marketable Trips

**Average
Willamette Valley
= 4.4 Nights**

**Average
Oregon
= 4.5 Nights**

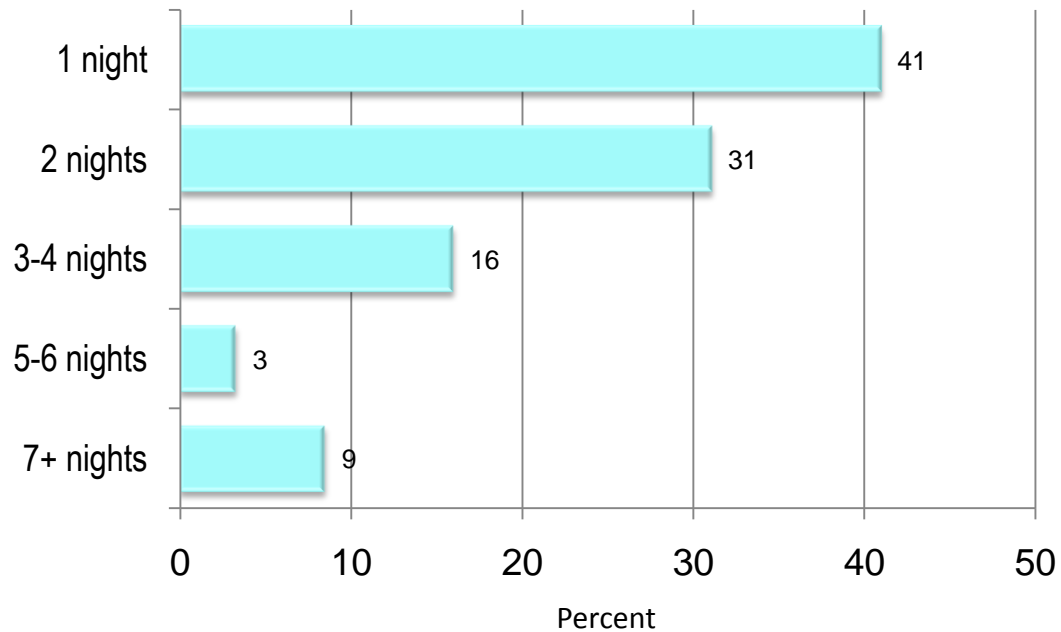


Number of Nights Spent in Willamette Valley Region



Base: Overnight Marketable Trip with 1+ Nights Spent Willamette Valley

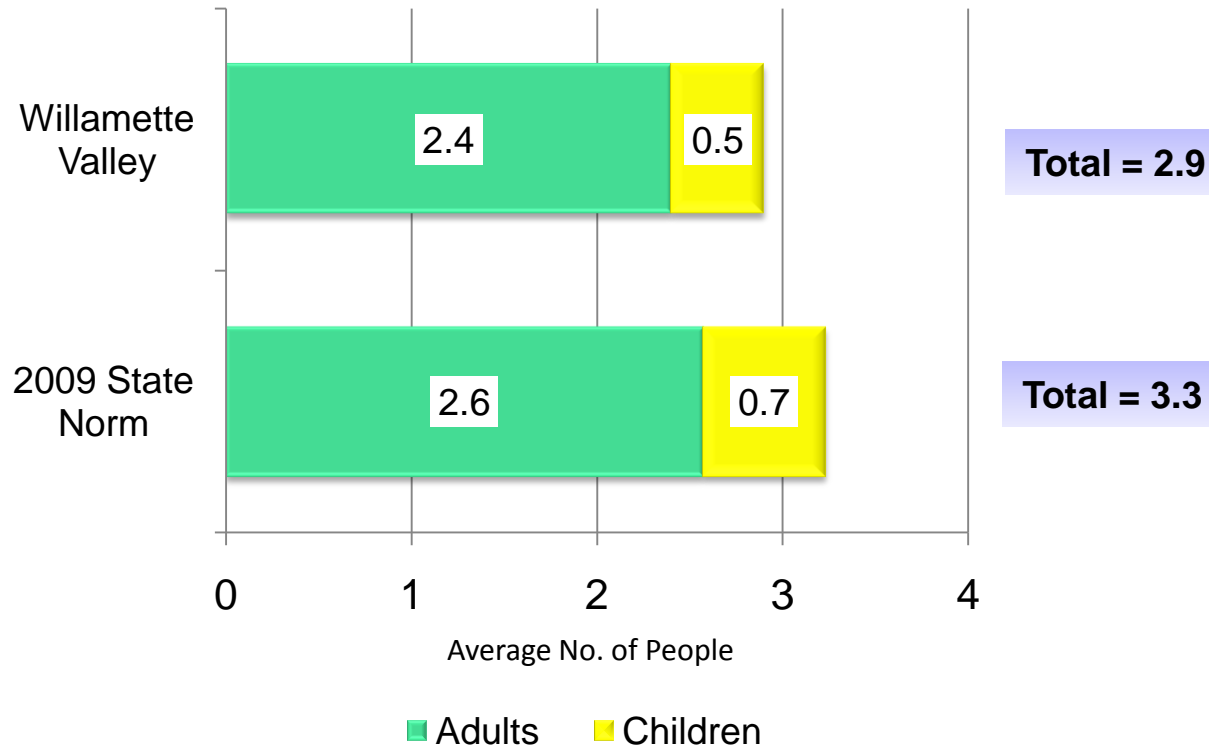
Average Nights Spent in Willamette Valley = 2.4



Size of Travel Party



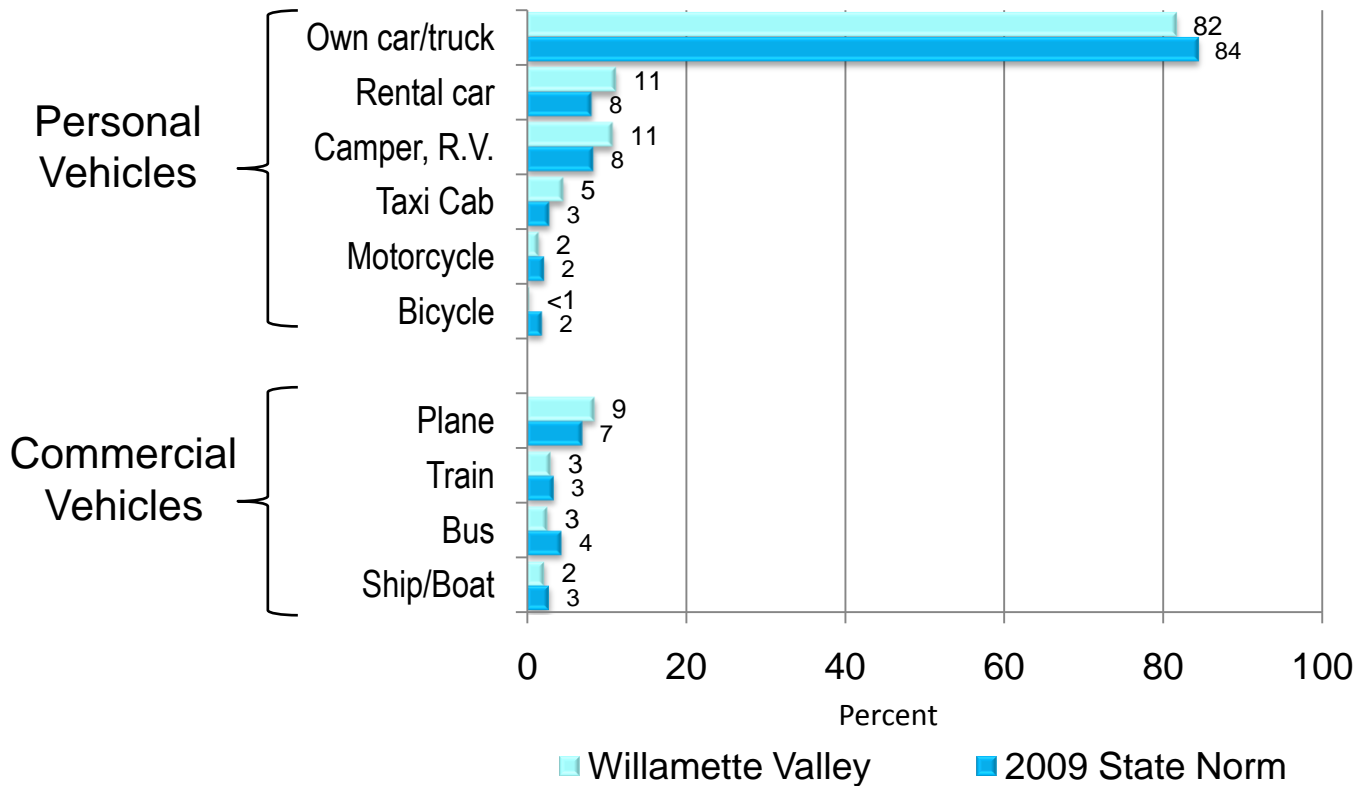
Base: Overnight Marketable Trips



Transportation



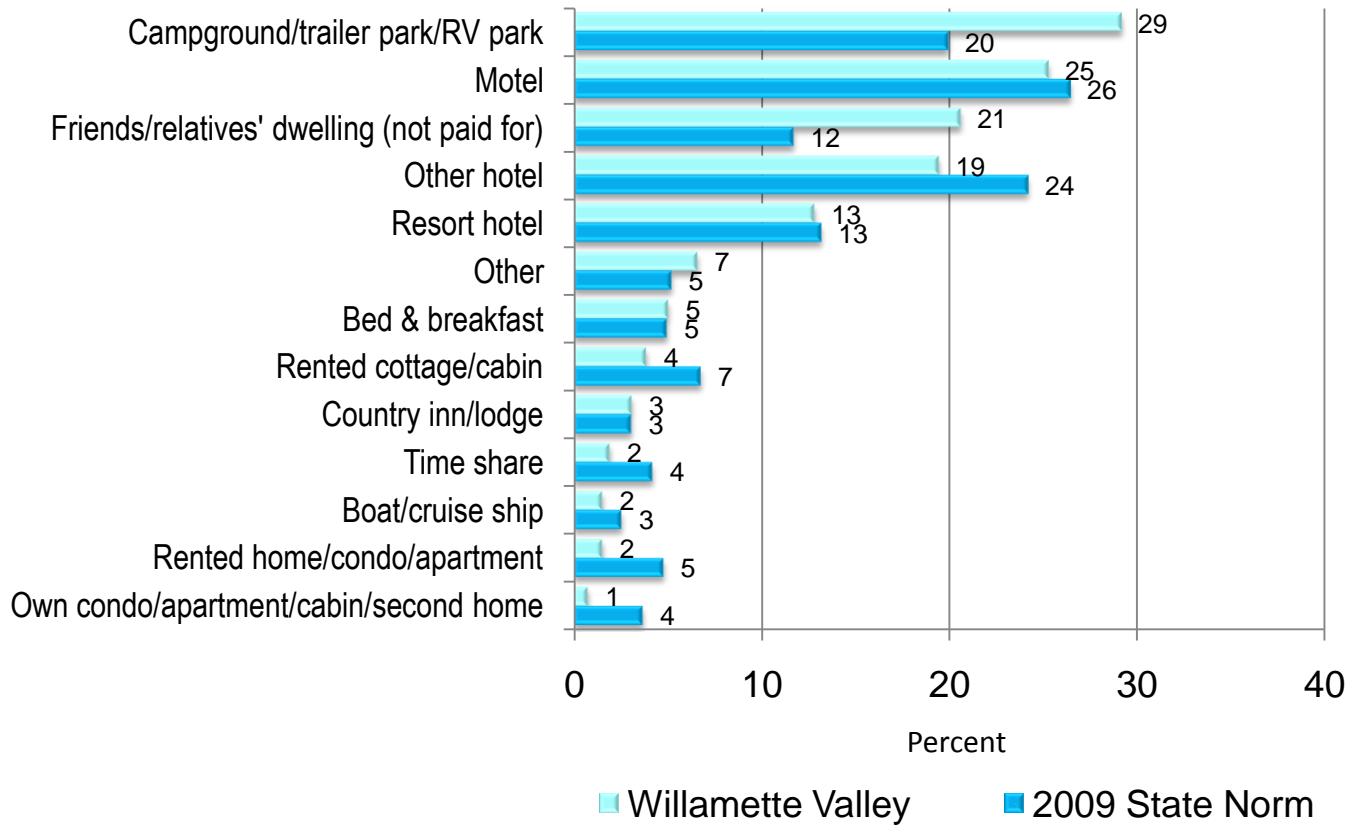
Base: Overnight Marketable Trips



Accommodation



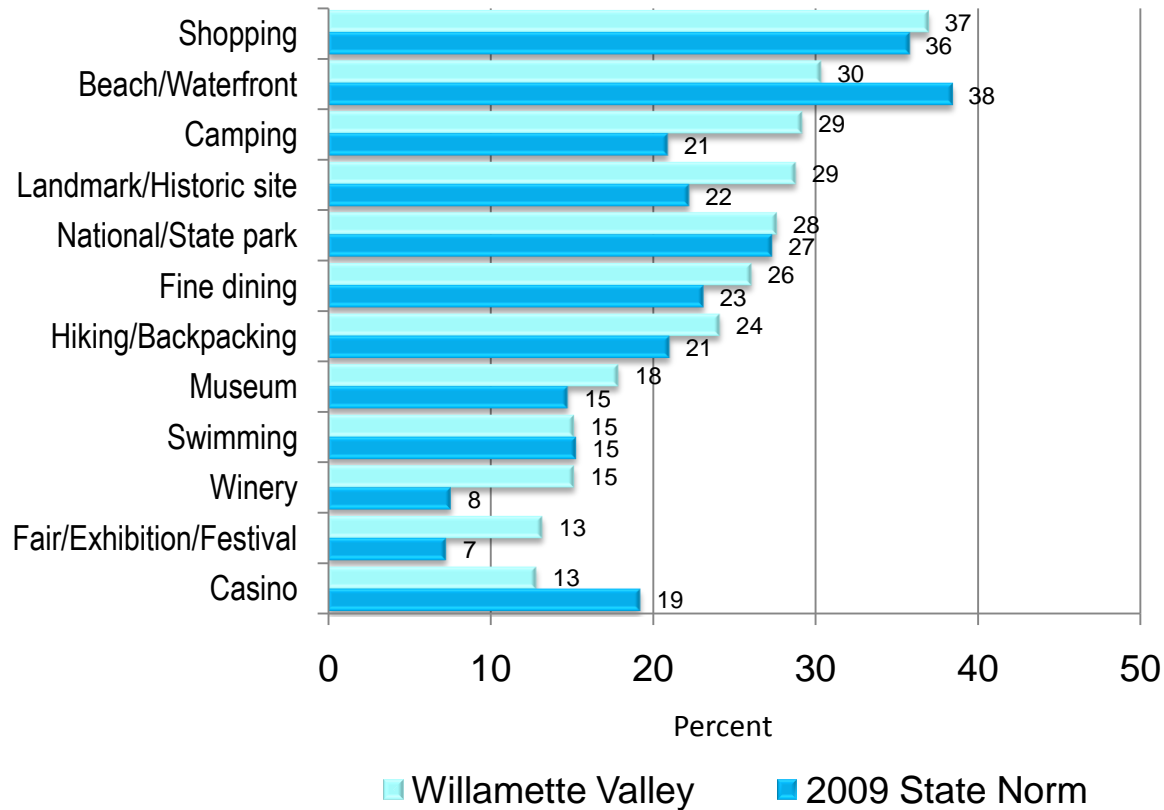
Base: Overnight Marketable Trips



Activities and Experiences



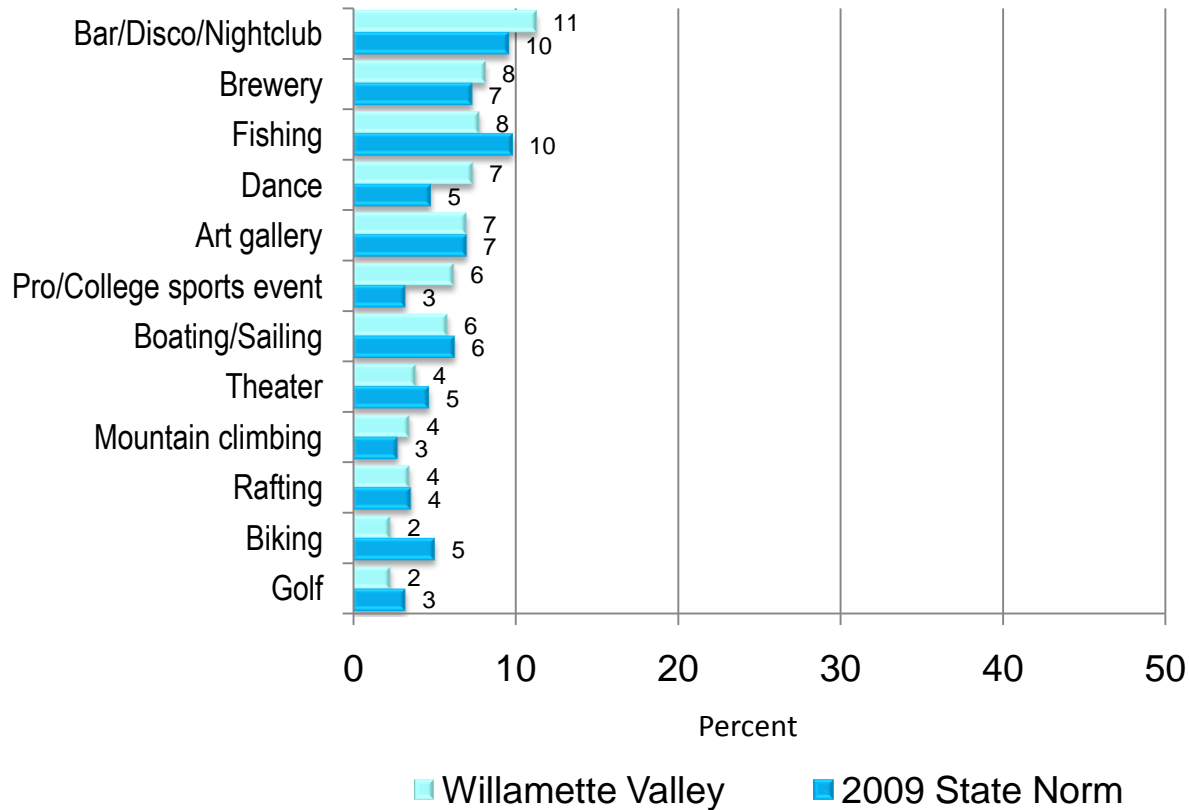
Base: Overnight Marketable Trips



Activities and Experiences (Cont'd)



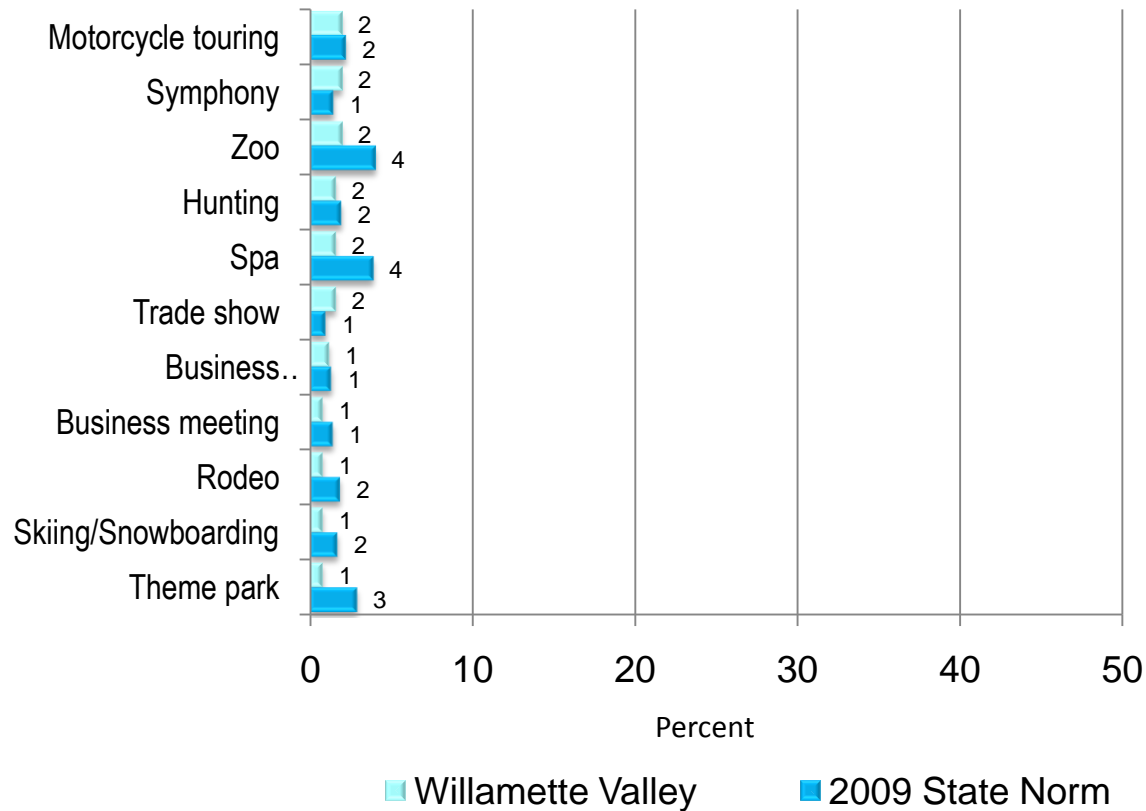
Base: Overnight Marketable Trips



Activities and Experiences (Cont'd)



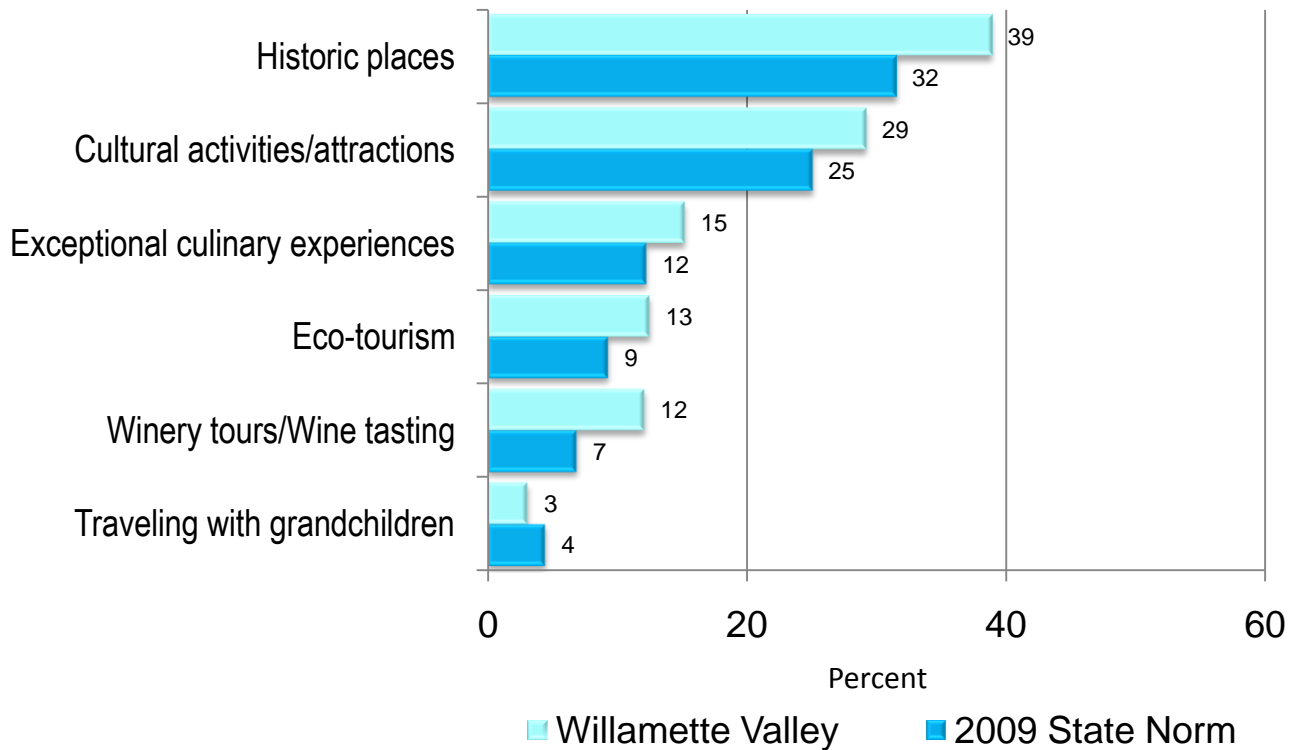
Base: Overnight Marketable Trips



Activities of Special Interest



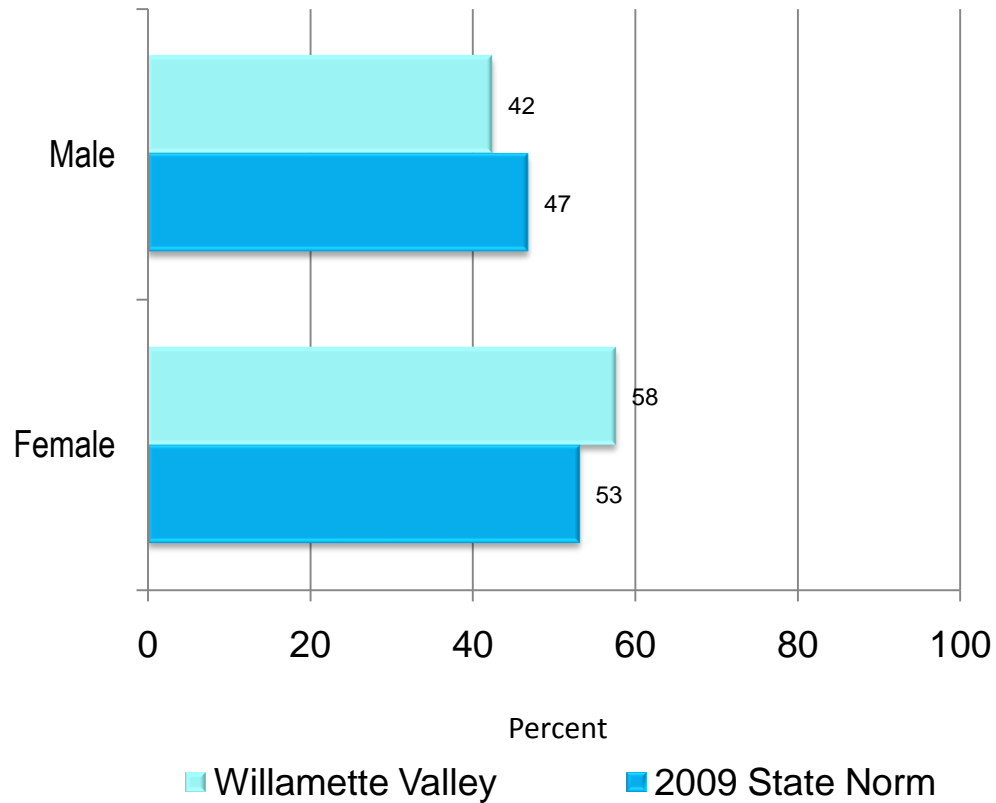
Base: Overnight Marketable Trips



Gender



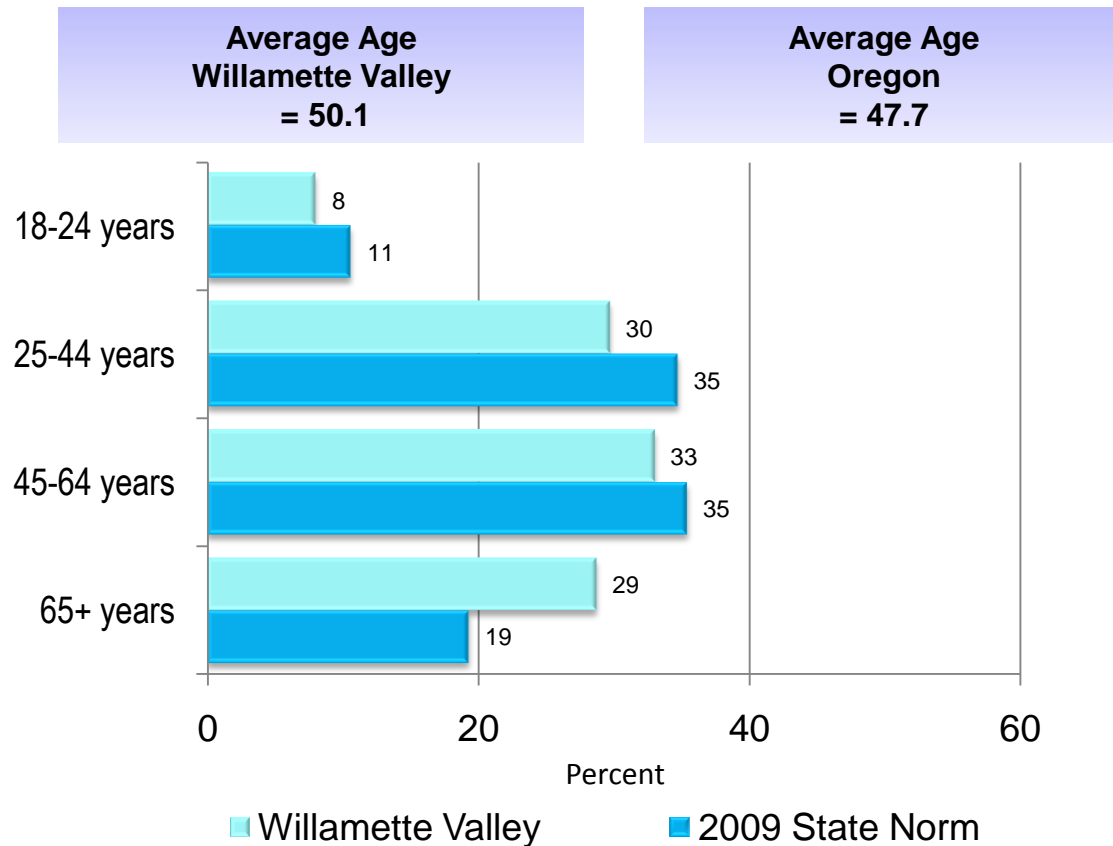
Base: Overnight Marketable Trips



Age



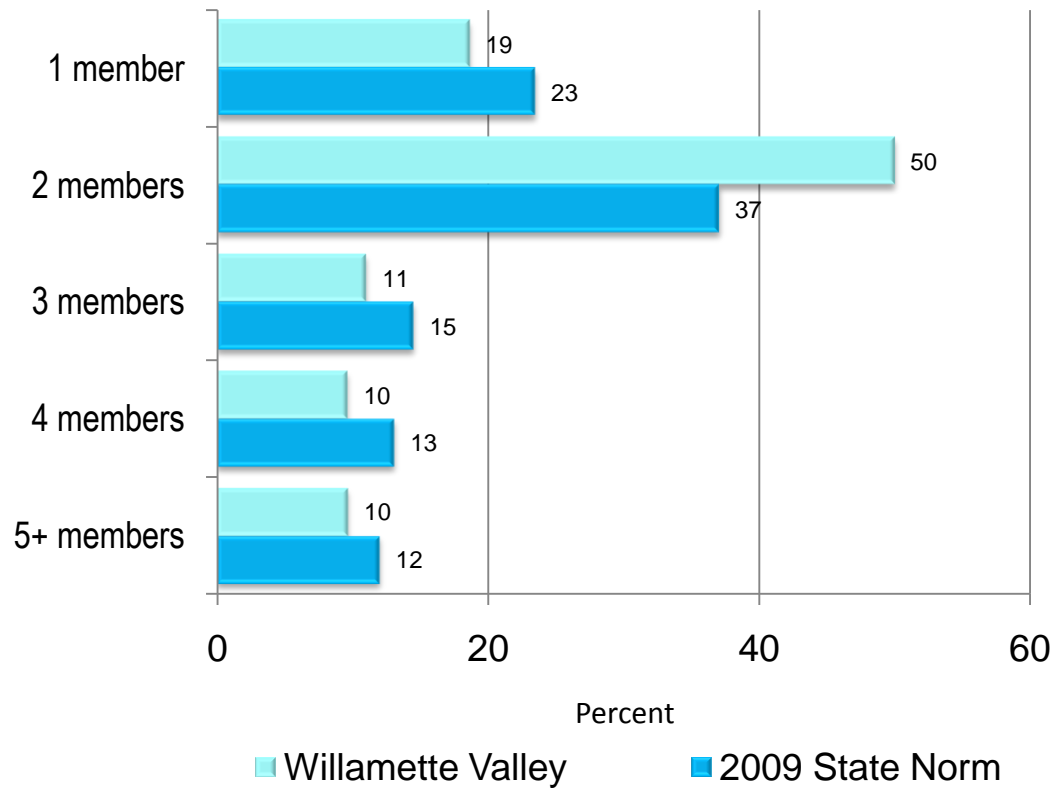
Base: Overnight Marketable Trips



Household Size



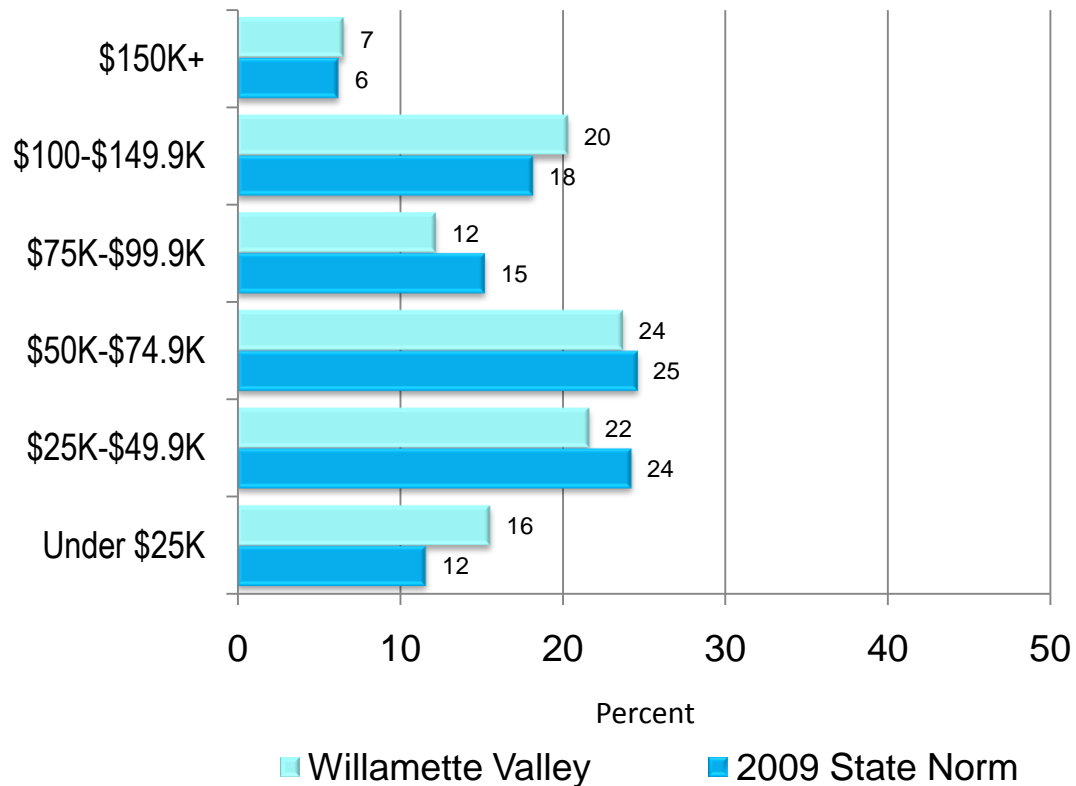
Base: Overnight Marketable Trips



Income



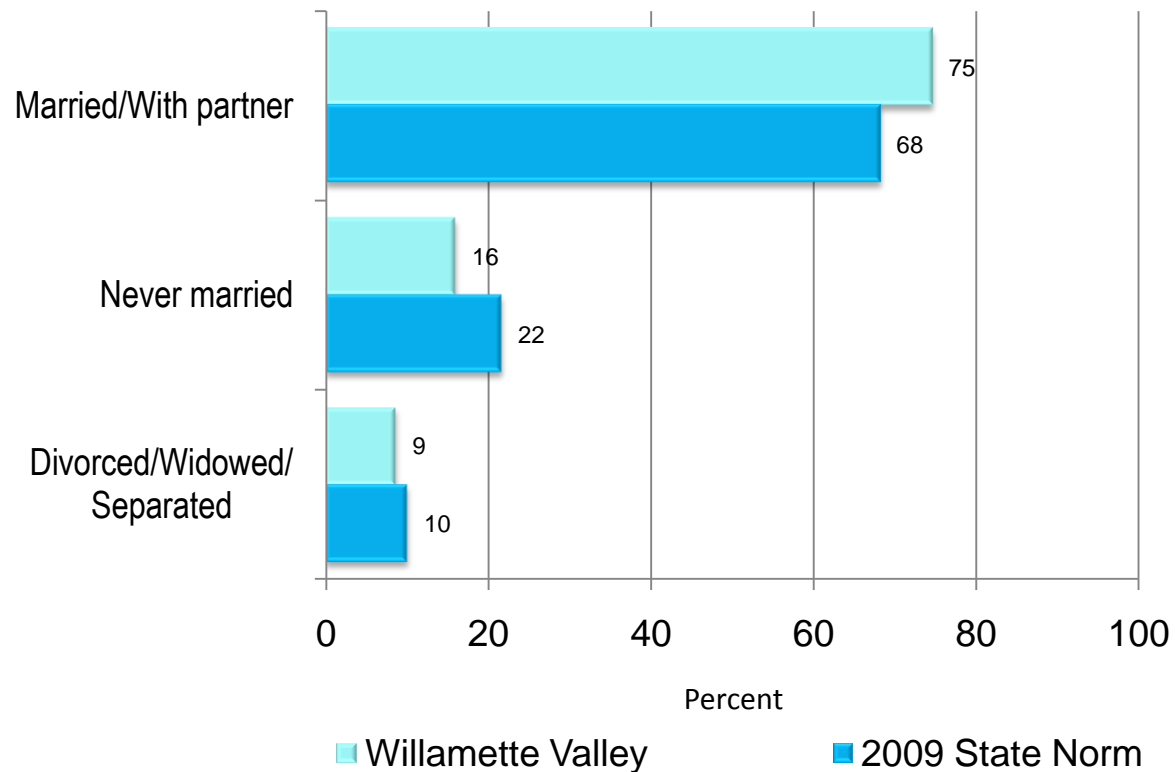
Base: Overnight Marketable Trips



Marital Status



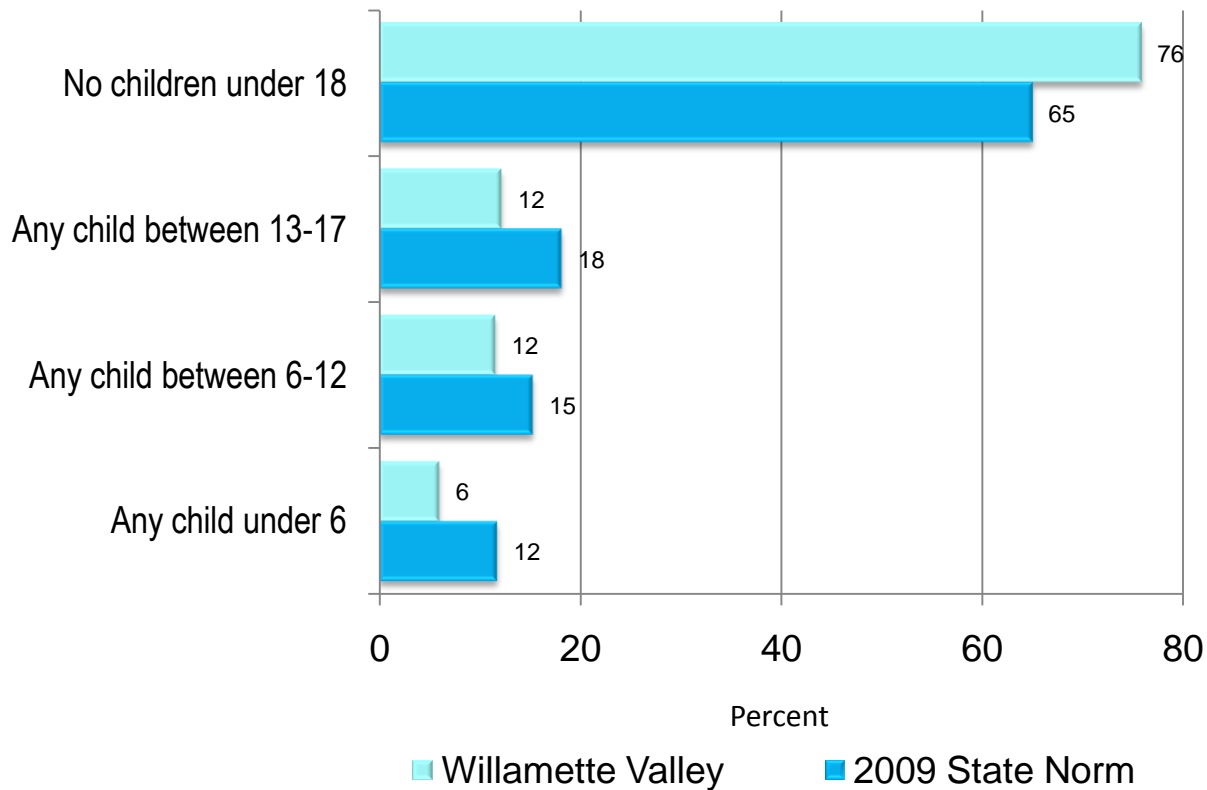
Base: Overnight Marketable Trips



Children in Household



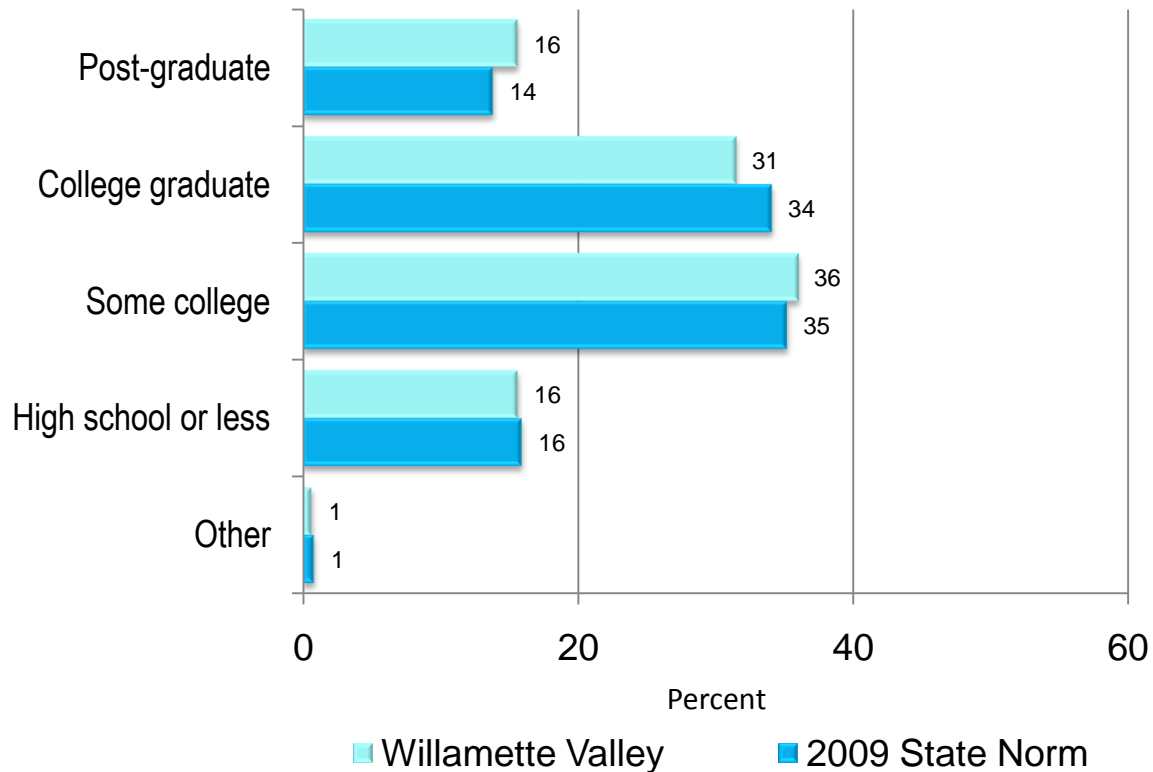
Base: Overnight Marketable Trips



Education



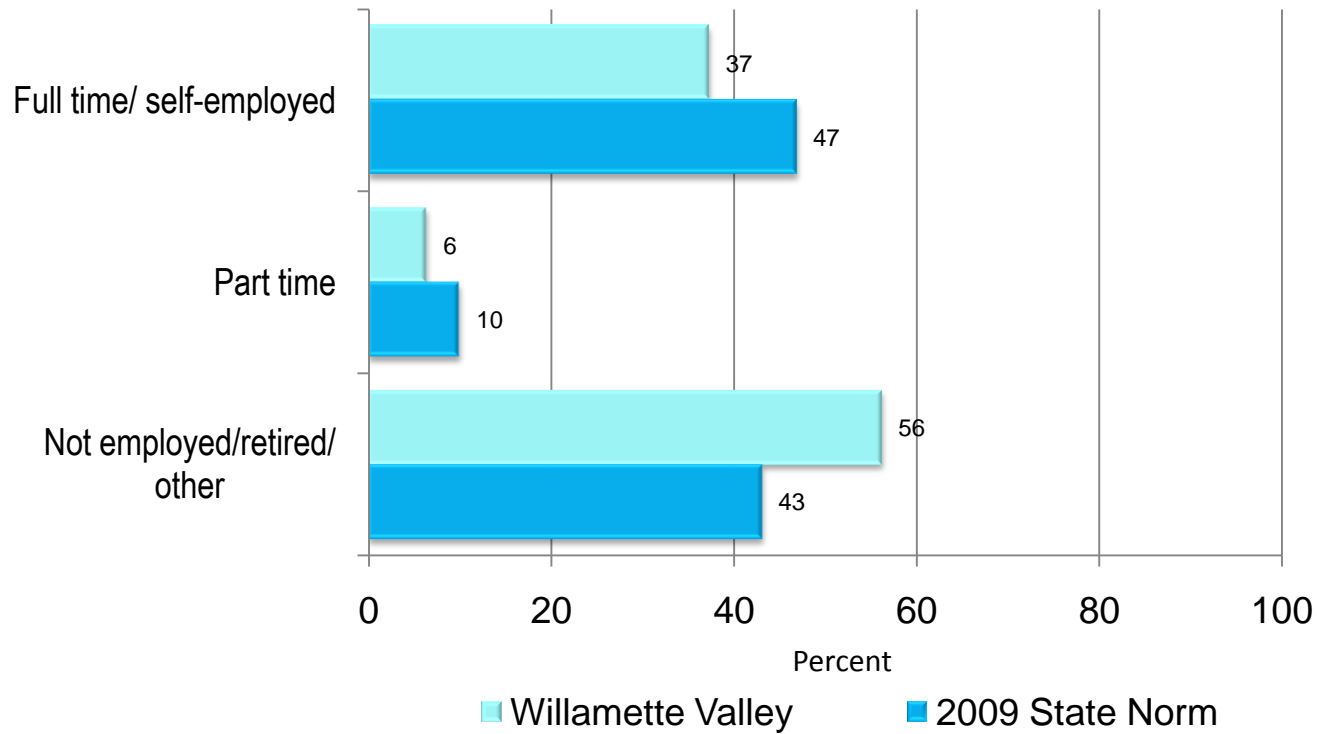
Base: Overnight Marketable Trips



Employment



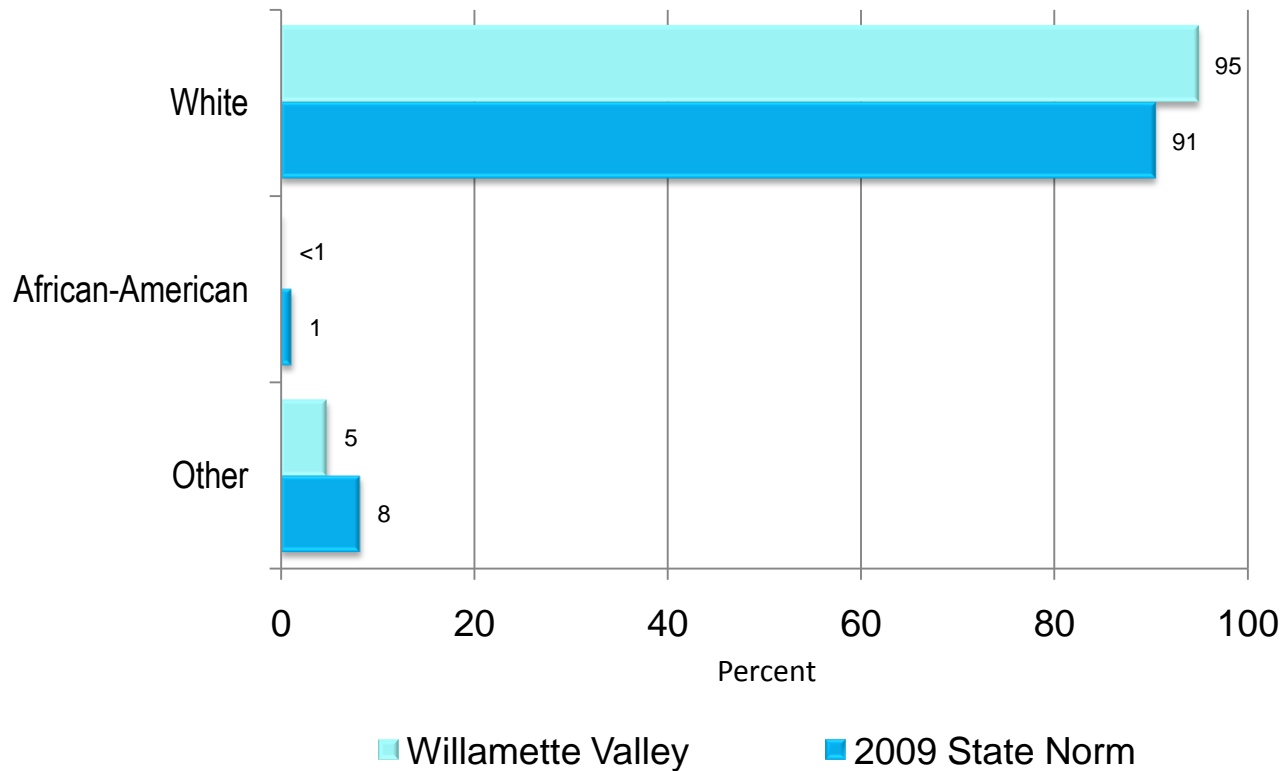
Base: Overnight Marketable Trips



Race



Base: Overnight Marketable Trips



Hispanic Background



Base: Overnight Marketable Trips

