



## Oregon 2011 Visitor Final Report

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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 2011.

# Methodology



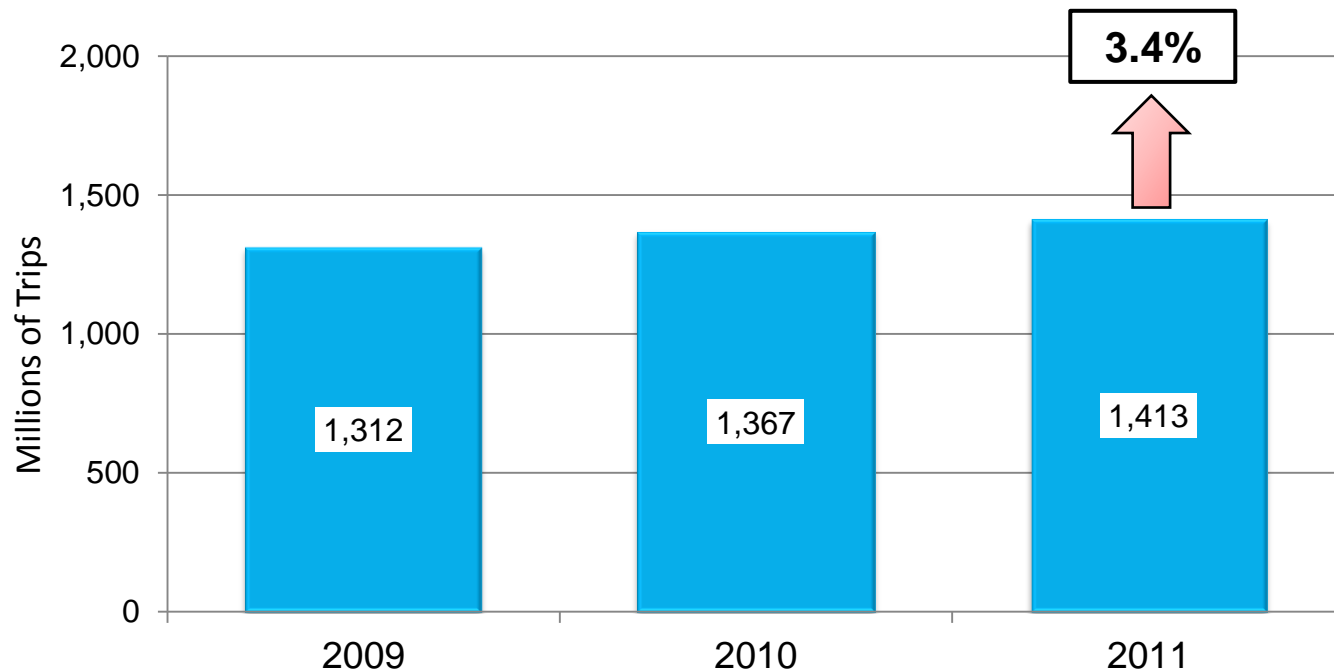
- ◉ Each quarter, a random cross-section of 500,000 panel members is sent an e-mail invitation to participate in the survey, for a total annual outgo of two million. A reminder is e-mailed several days later to non-responders. In 2011, the completion rate for those accessing the **Travel USA®** questionnaire was 87%.
- ◉ For the 2011 travel year, this yielded :
  - ◉ 207,014 trips for analysis nationally:
    - ◉ 138,771 overnight trips
    - ◉ 68,243 day trips
- ◉ For Oregon, the following sample was achieved in 2011:
  - ◉ 3,694 trips:
    - ◉ 2,363 overnight trips, 1025 of which were *marketable trips*
    - ◉ 1,331 day trips, 785 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 Structure & Trends

# Total Size of the U.S. Travel Market — 2009-2011



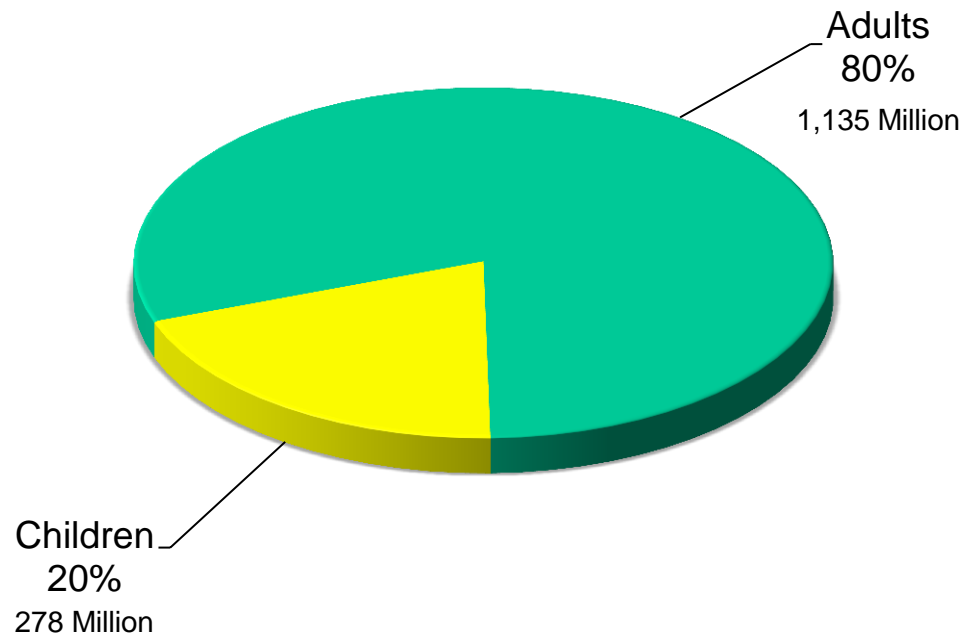
Base: Total Overnight Trips



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



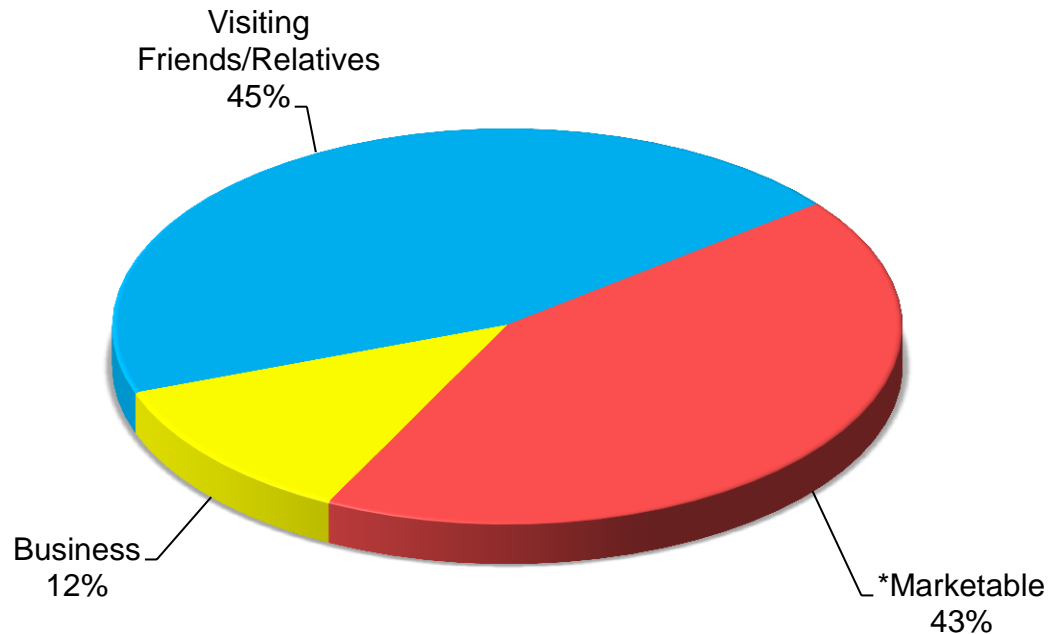
**Total Person-Trips = 1,413 Million**



# Structure of the U.S. Travel Market — 2011 Overnight Trips



Base: Adult Overnight Trips



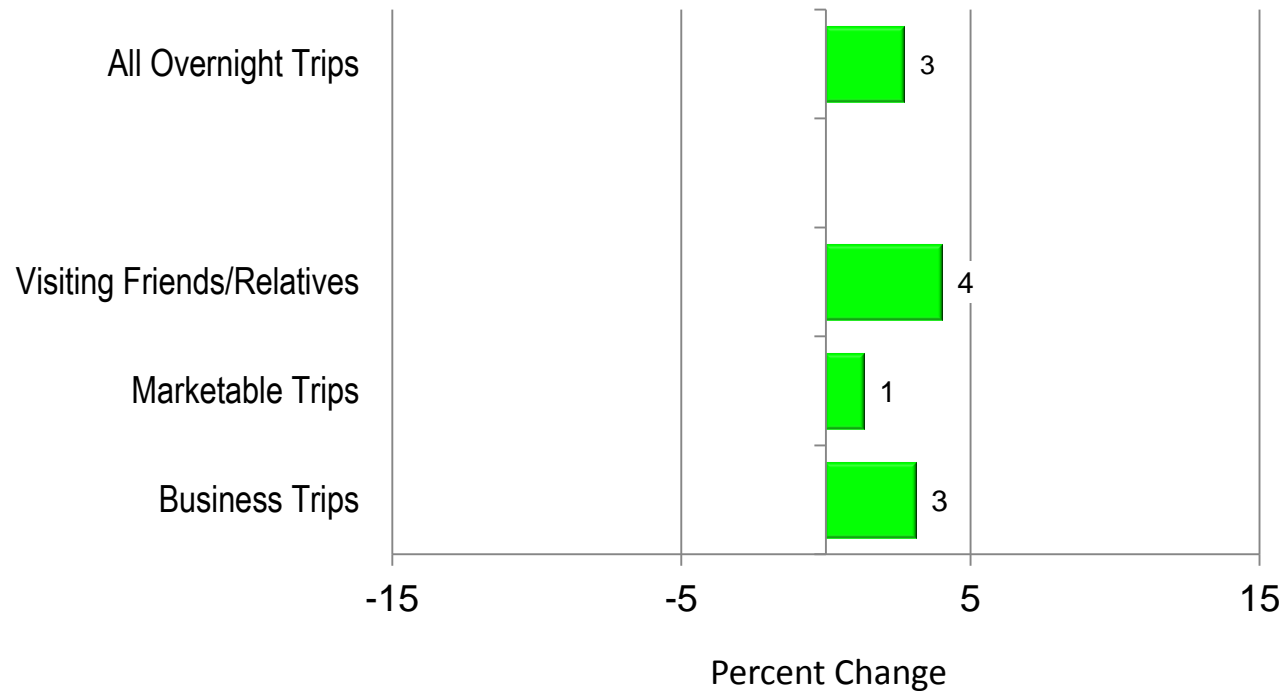
\*Marketable includes Business-Leisure



# U.S. Market Trends for Overnight Trips — 2011 vs. 2010



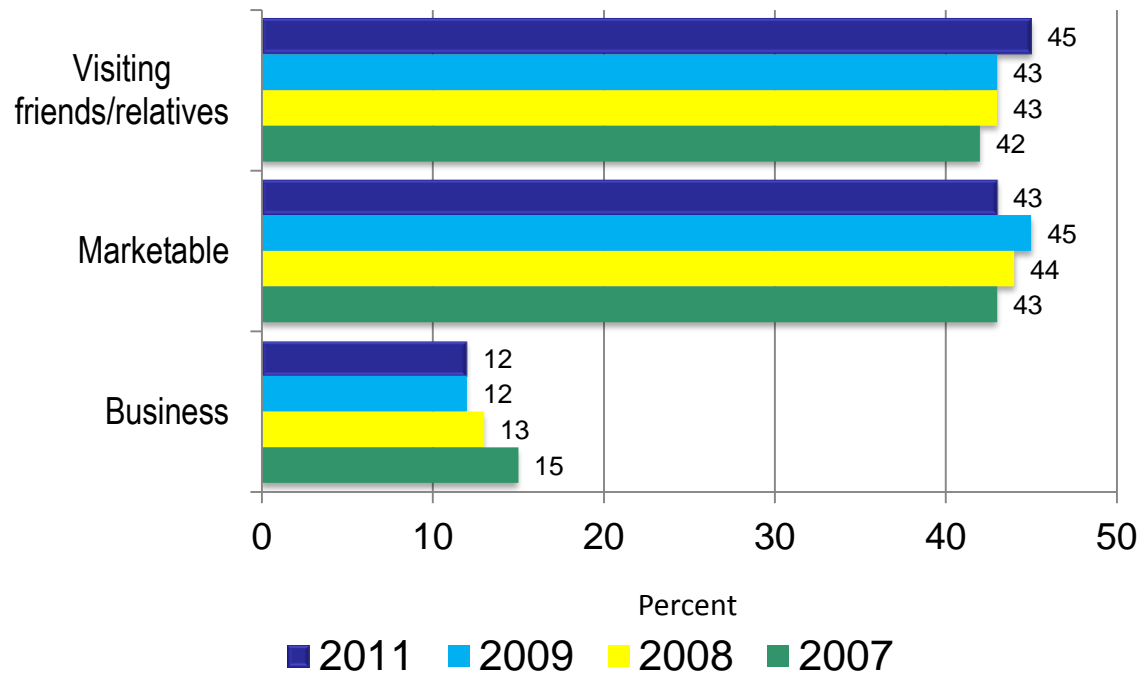
Base: Adult Overnight Trips



# Structure of U.S. Overnight Travel Market - Trends



Base: Adult Overnight Trips



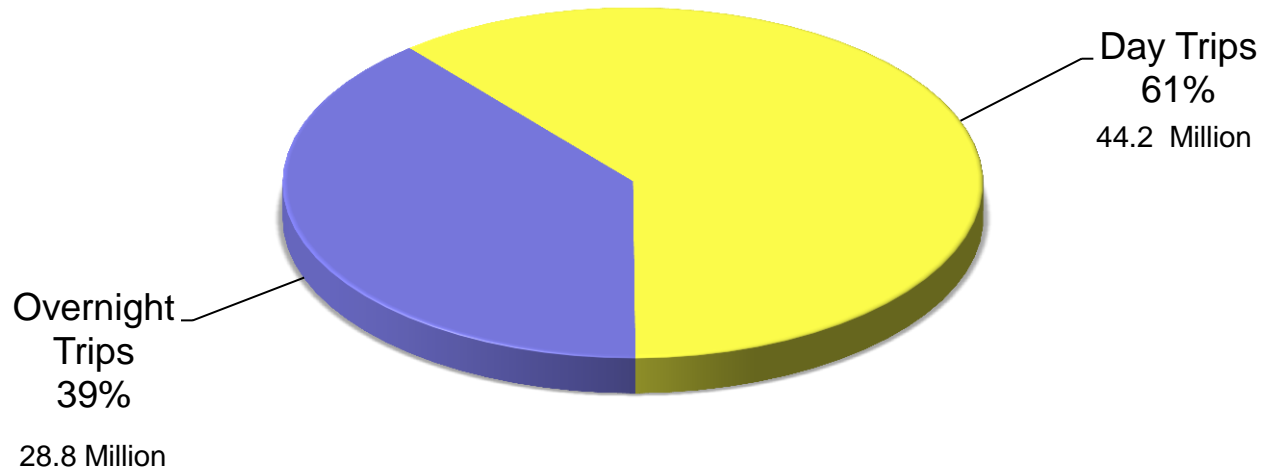
# Oregon Travel Market

## Size & Structure

# Total Size of Oregon's Travel Market



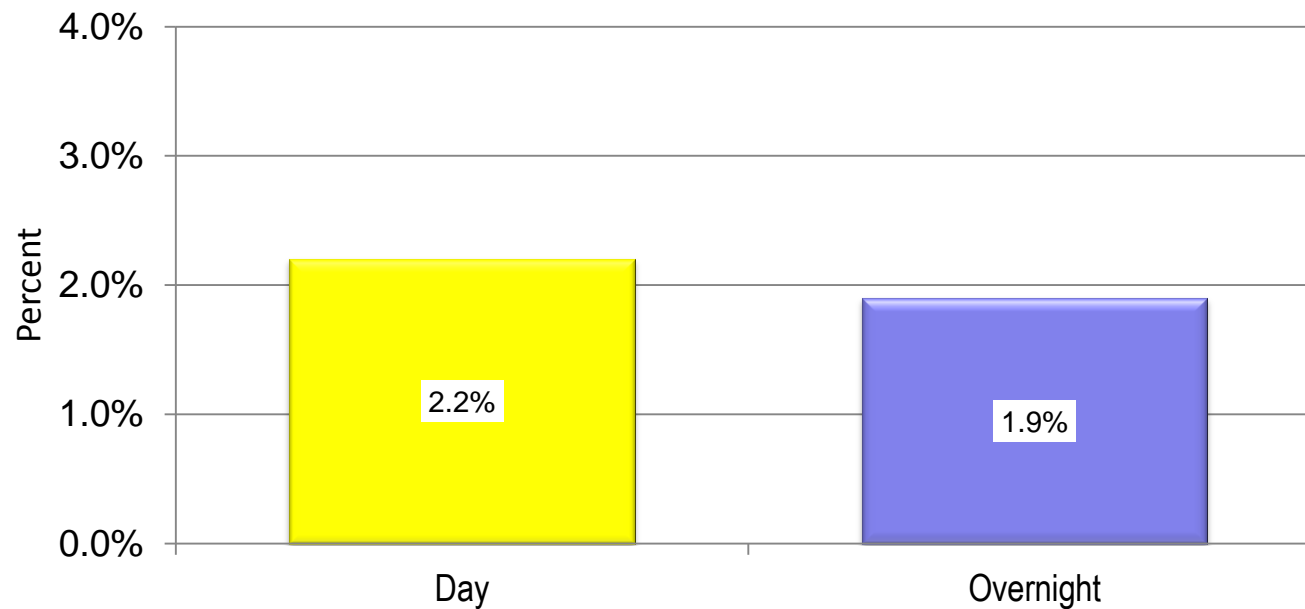
**Total Person-Trips\* = 73 Million**



# Oregon's Share of Adult Domestic Trips



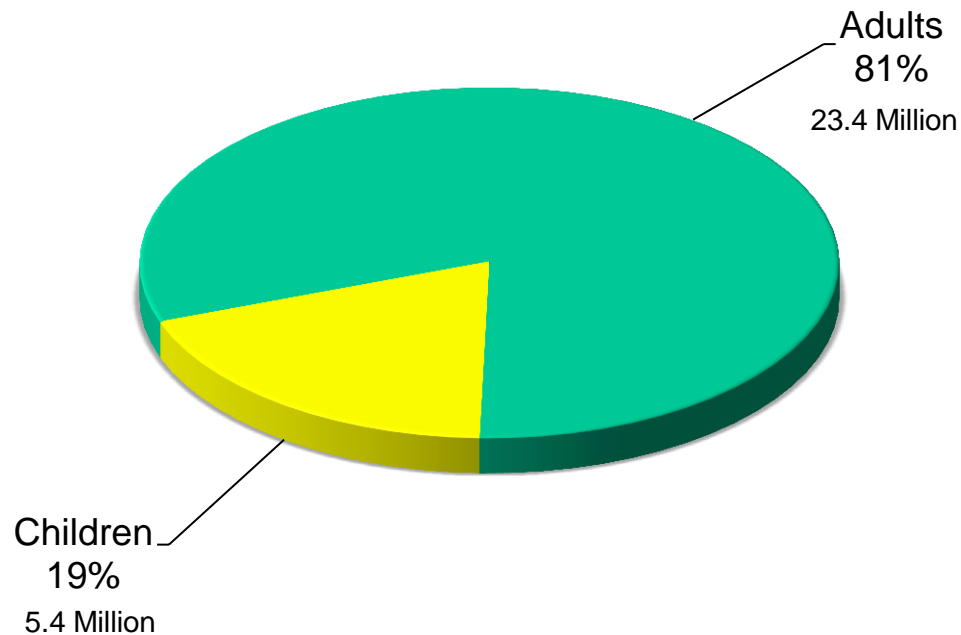
Base: Adult Person-Trips



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



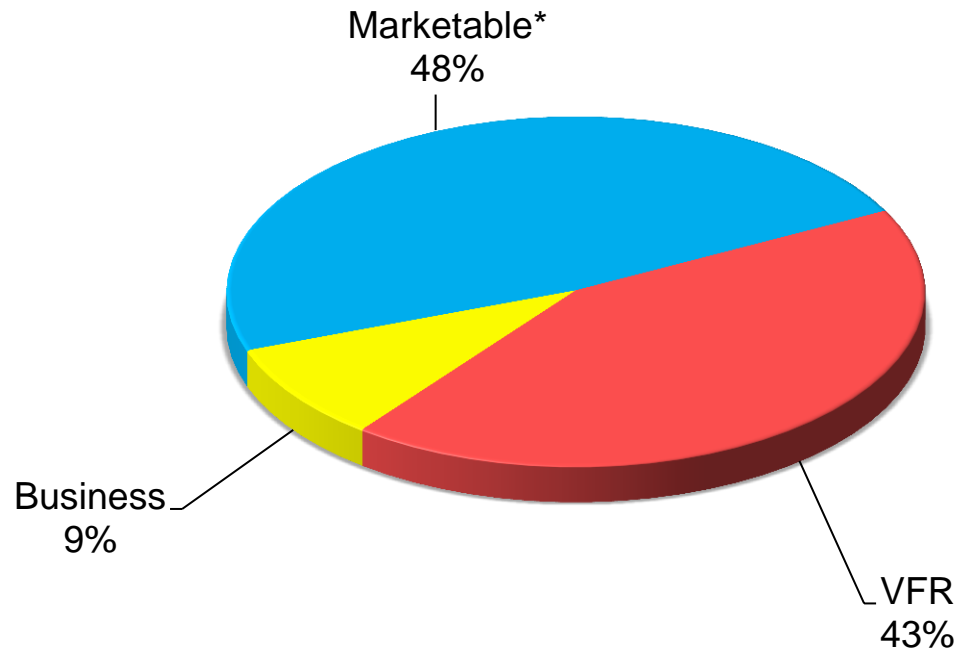
**Total Person-Trips = 28.8 Million**



# Oregon's Overnight Travel Market — by Trip Purpose



Base: Adult Overnight Person-Trips to Oregon

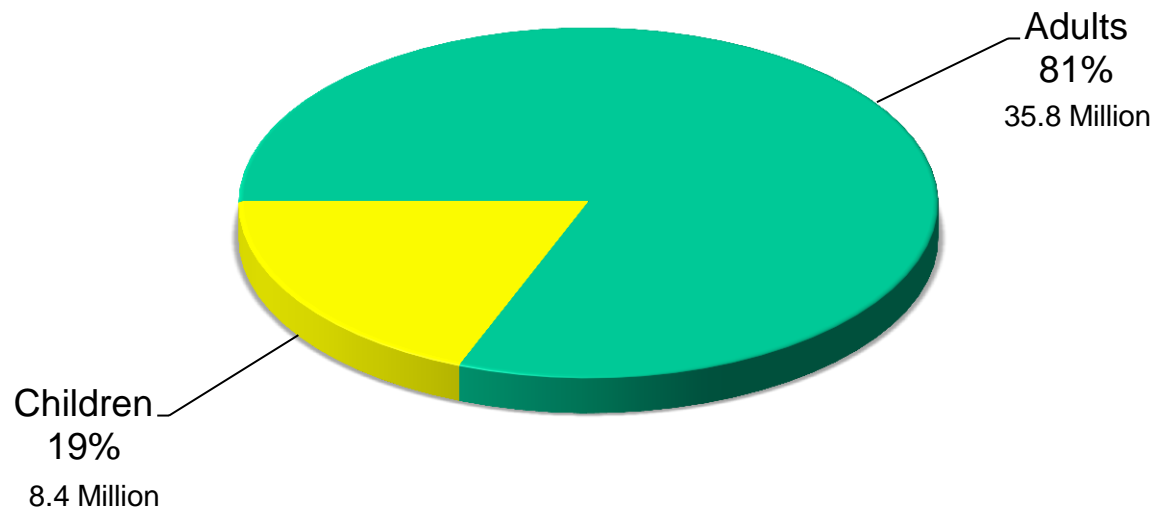


\*Marketable includes Business-Leisure

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



**Total Day Person-Trips = 44.2 Million**

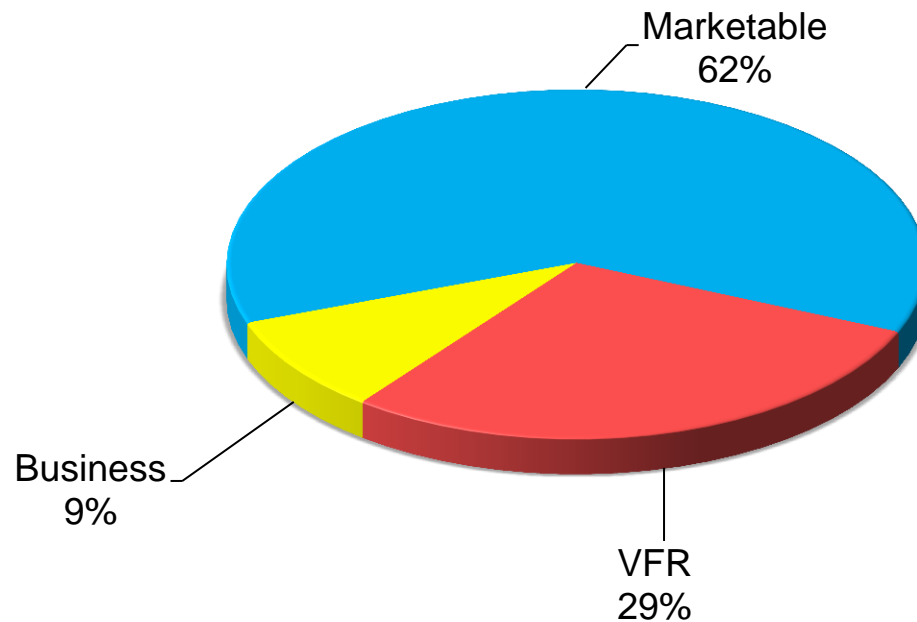




# Oregon's Day Travel Market — by Trip Purpose



Base: Adult Day Person-Trips to Oregon



\*Marketable includes Business-Leisure



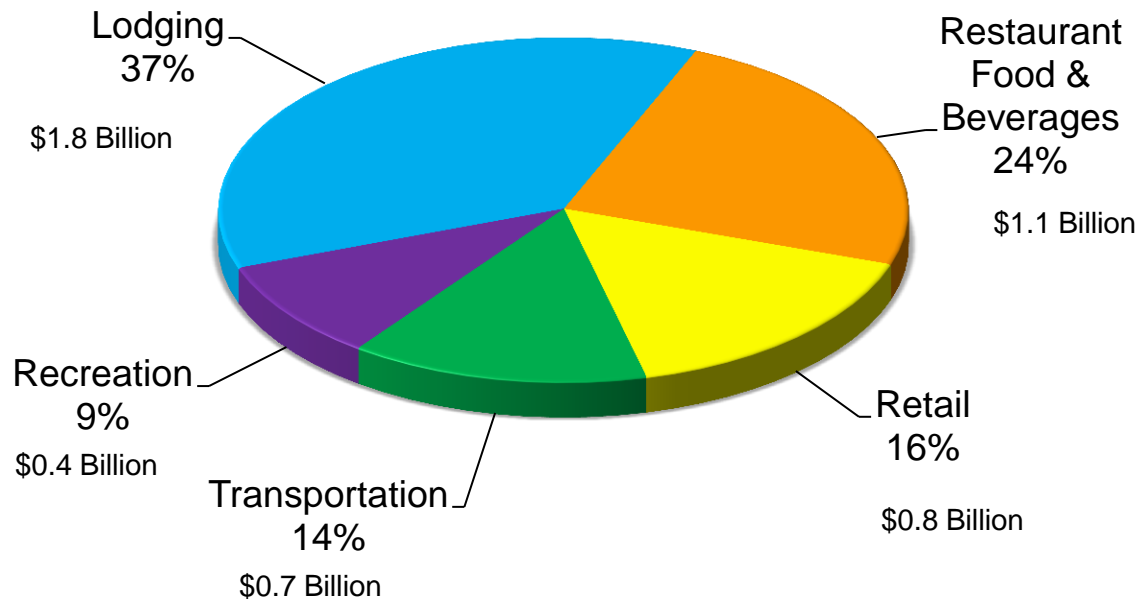
# Overnight Trip Detail

# Overnight Expenditures

# Total Overnight Spending — by Sector



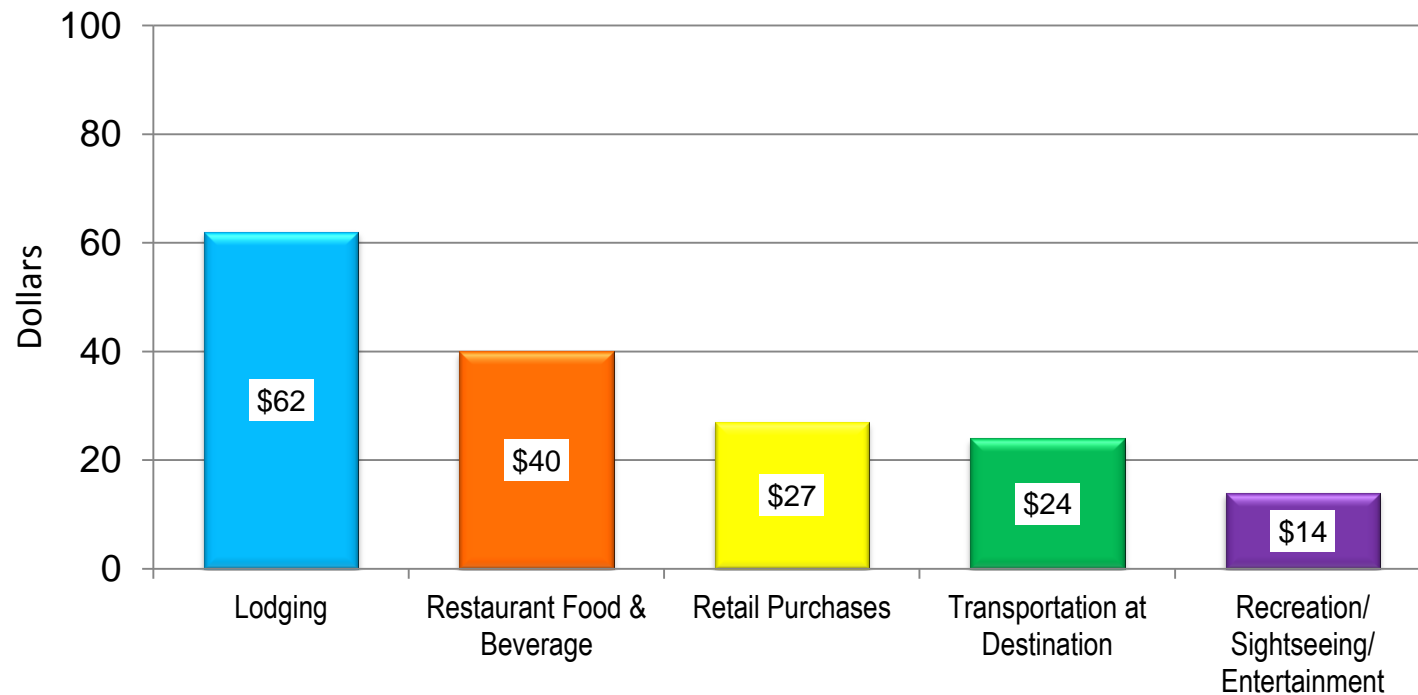
**Total Spending = \$4.8 Billion**



# Average Per Person Expenditures on Overnight Trips — By Sector



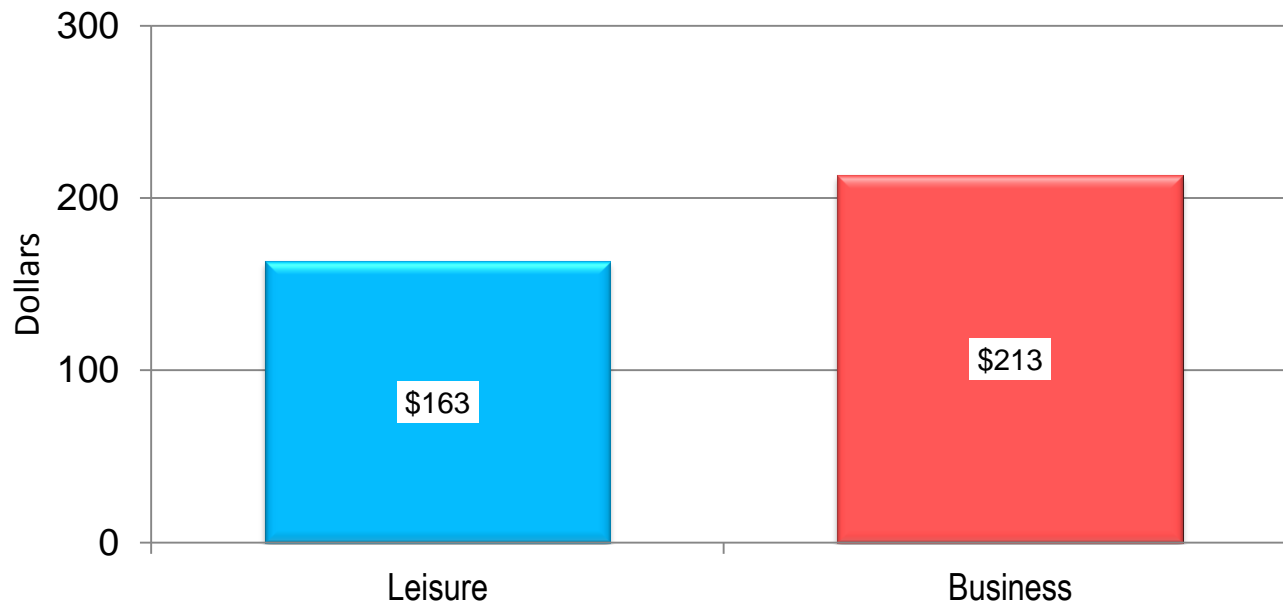
Base: Total Overnight Person-Trips



# Average Per Person Expenditures on Overnight — by Trip Purpose



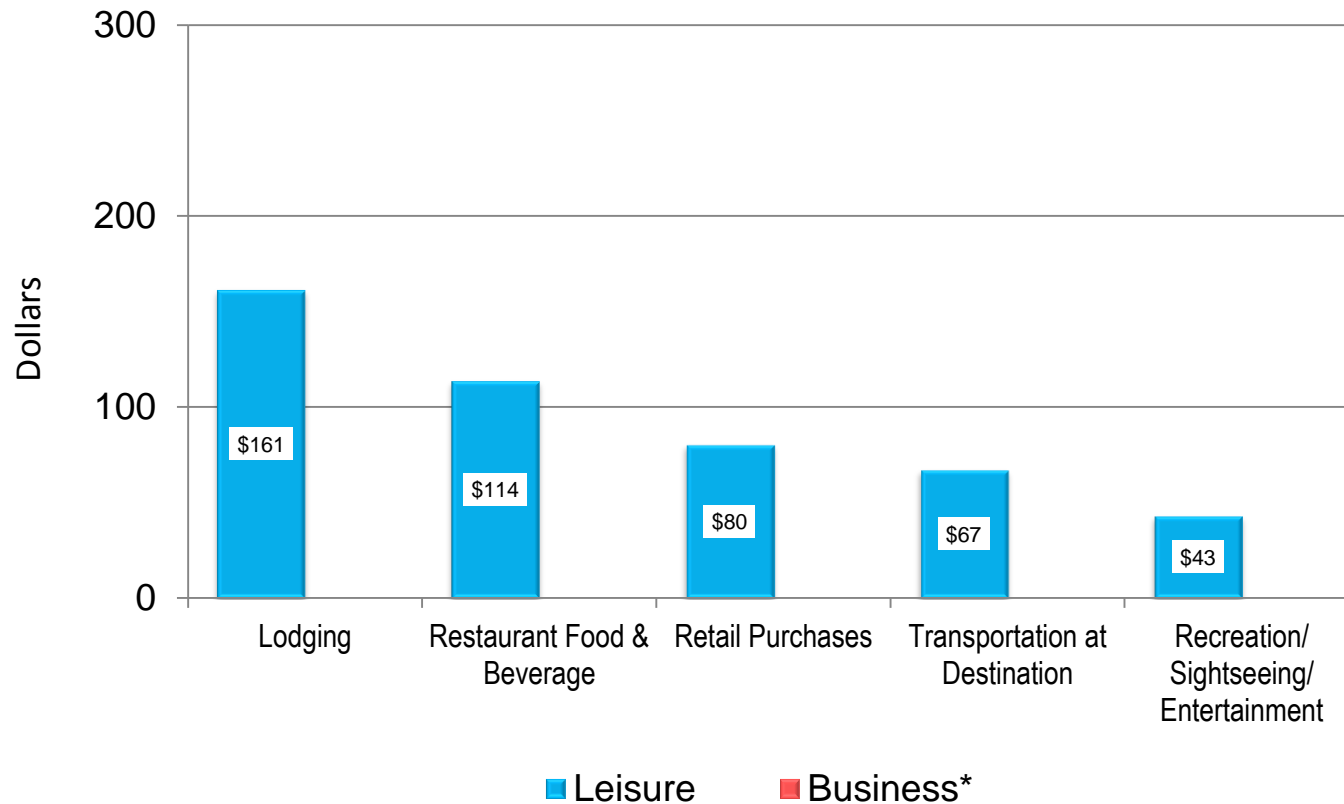
Base: Total Overnight Person-Trips



# Average Per Party Expenditures on Overnight Trips



Base: Total Overnight Person-Trips



\*Low business base

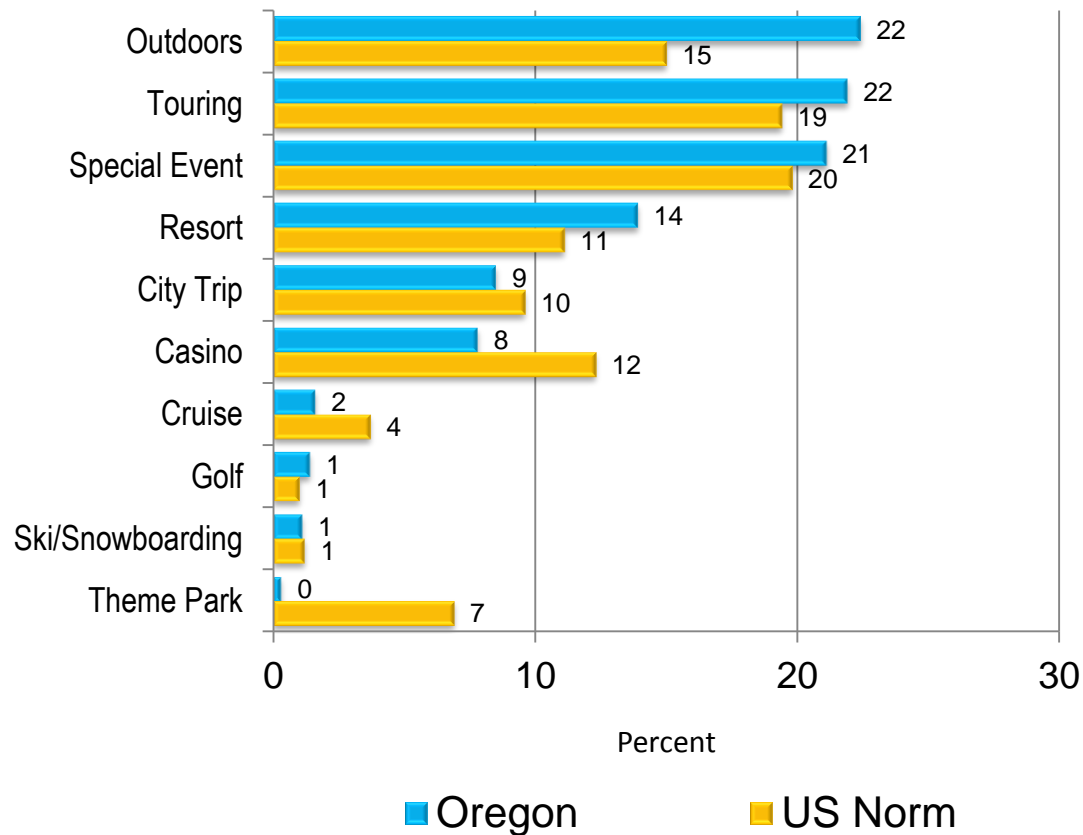
# Overnight Trip Characteristics



# Main Purpose of Marketable Trip – Oregon vs. National Norm



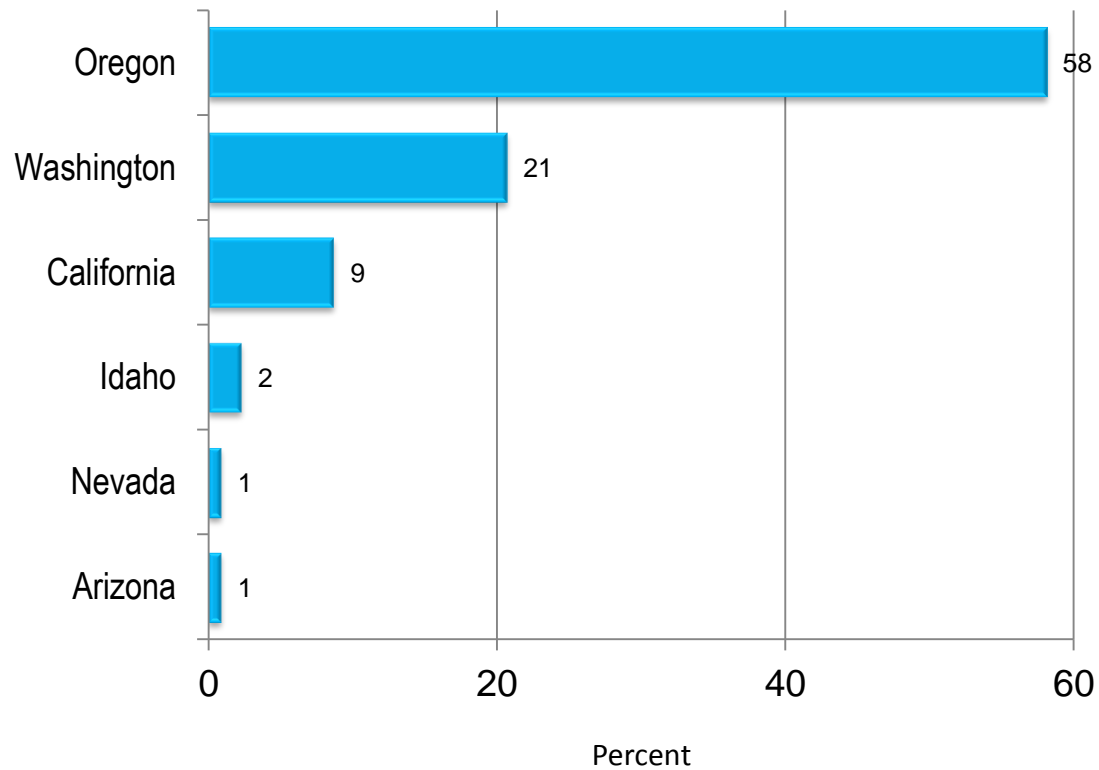
Base: Overnight Marketable Trips



# State Origin Of Trip



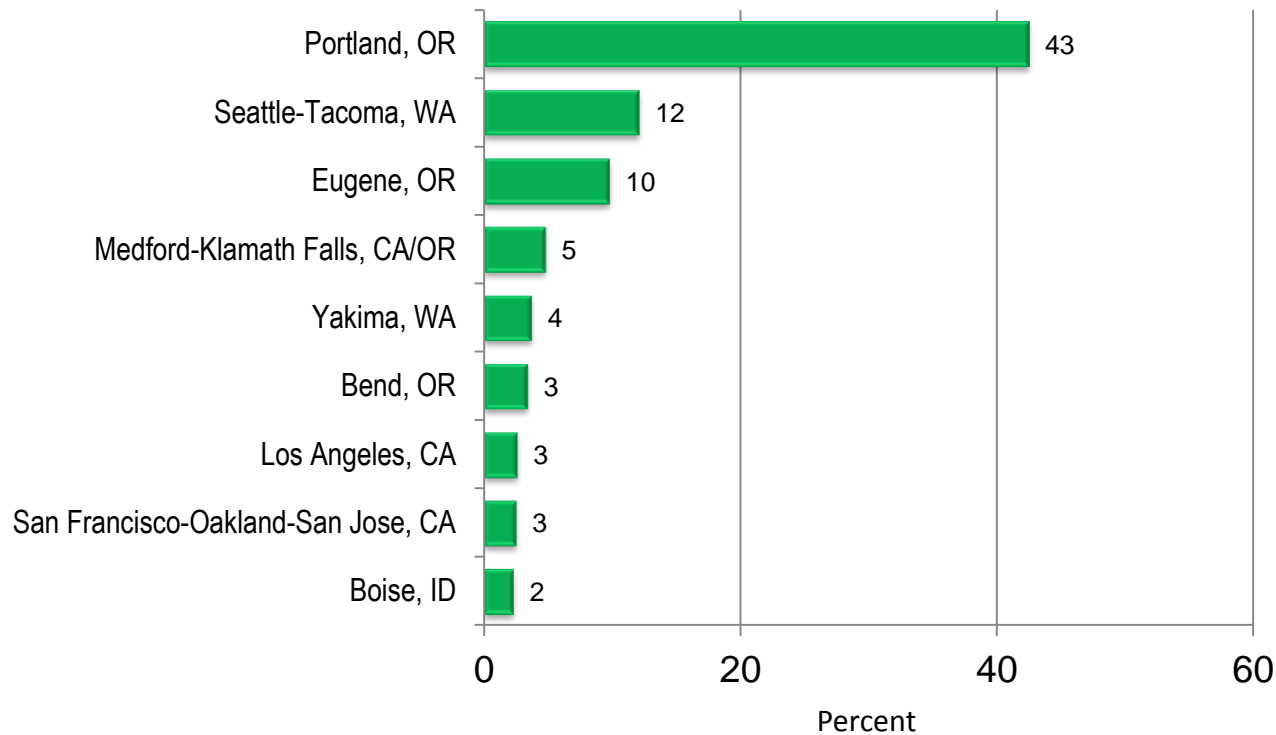
Base: Overnight Marketable Trips



# DMA Origin Of Trip



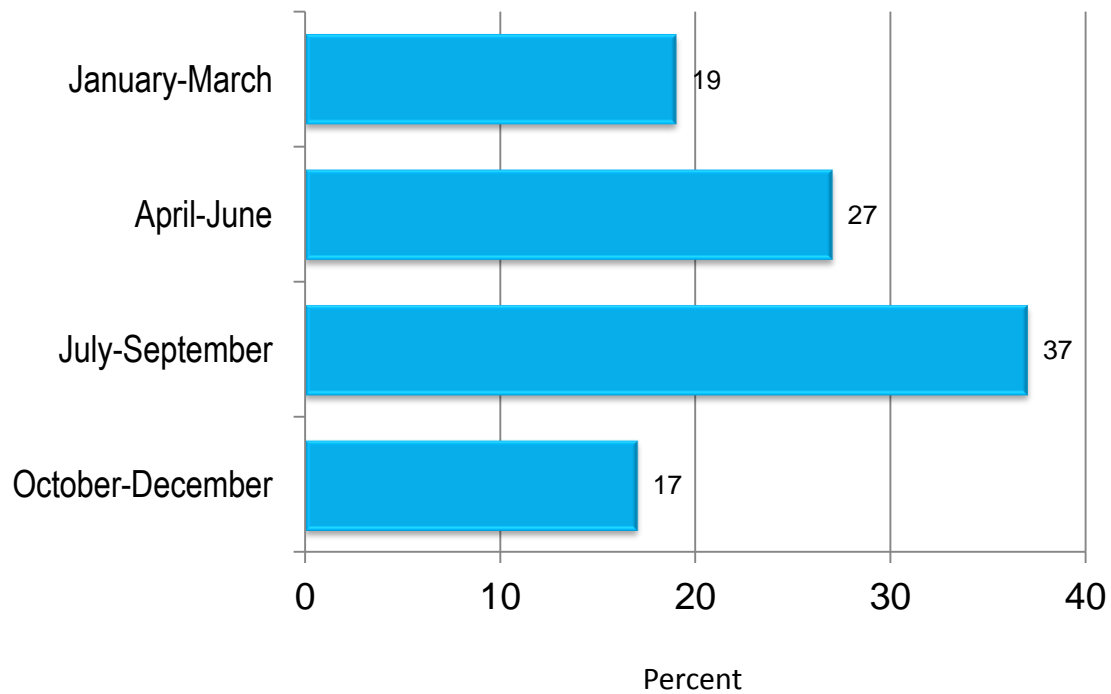
Base: Overnight Marketable Trips



# Season of Trip



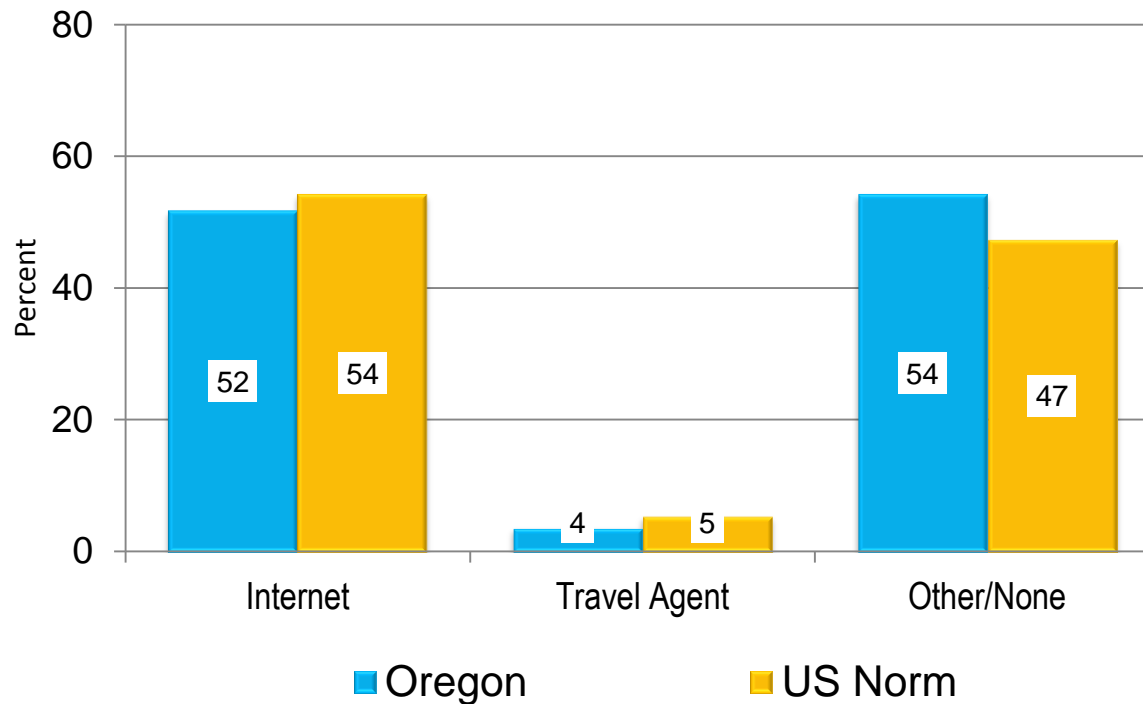
Base: Overnight Marketable Trips



# Method of Planning Trip



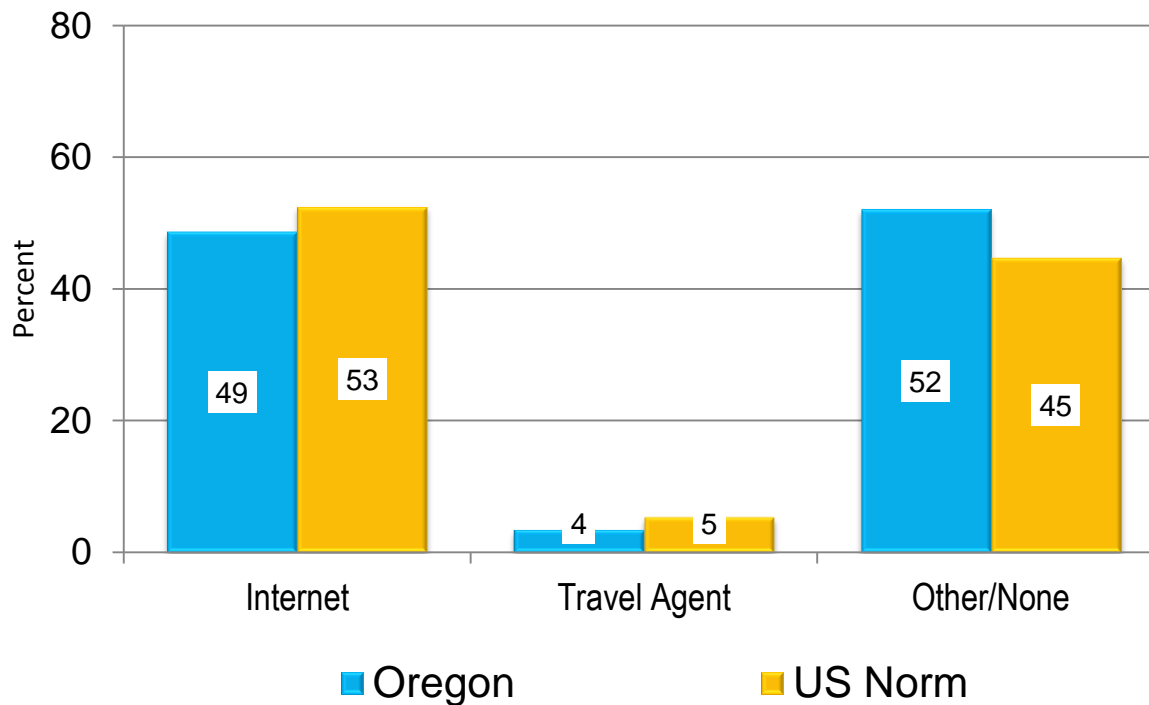
Base: Overnight Marketable Trips



# Method of Booking Trip



Base: Overnight Marketable Trips



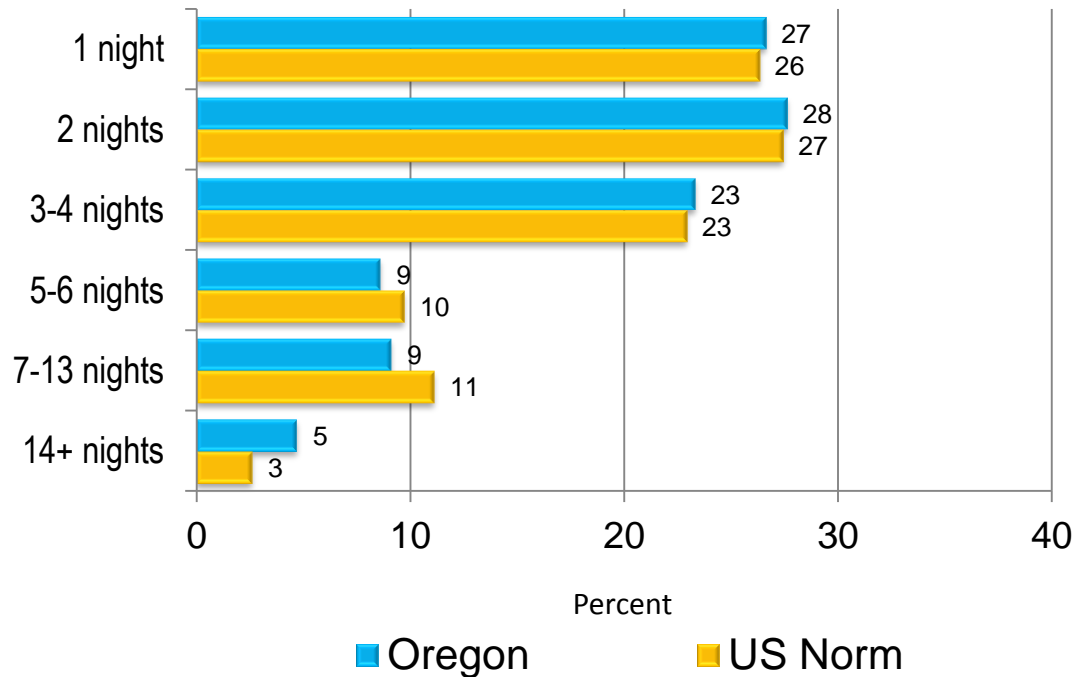
# Total Nights Away on Trip



Base: Overnight Marketable Trips

**Average  
Oregon  
= 3.8 Nights**

**Average  
US Norm  
= 3.5 Nights**

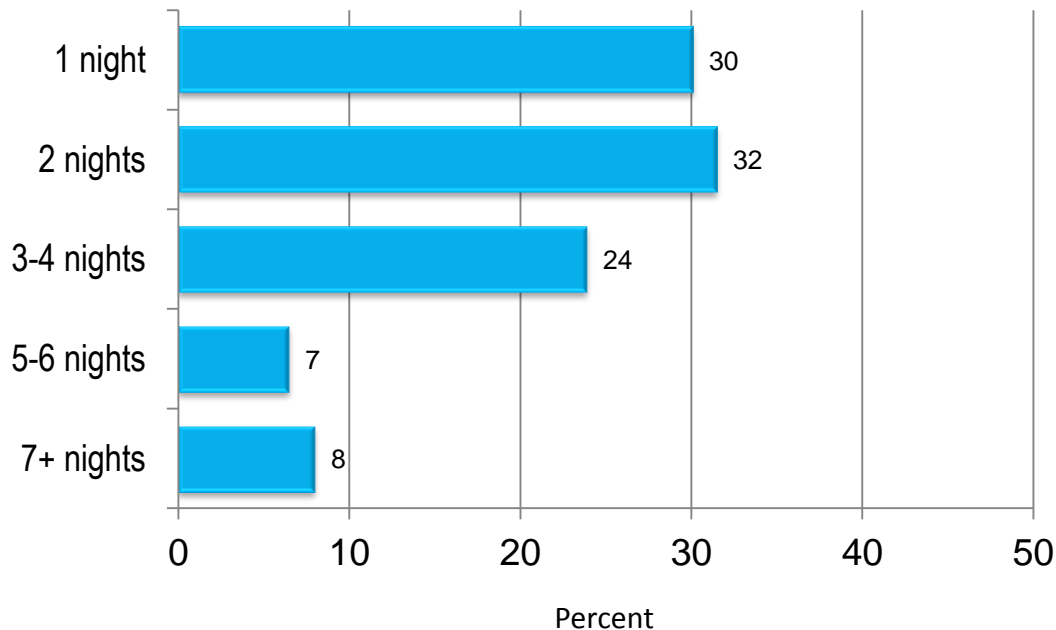


# Number of Nights Spent in Oregon



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

**Average Nights Spent in Oregon = 2.9**

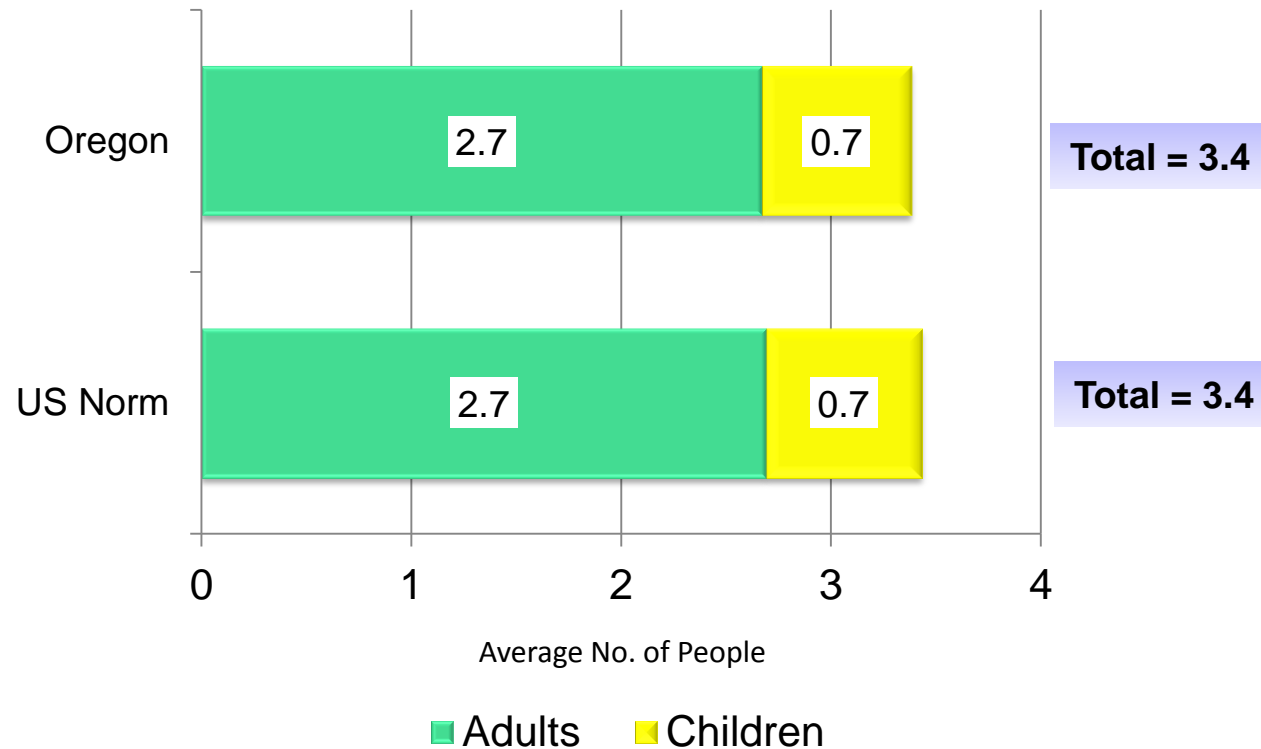




# Size of Travel Party



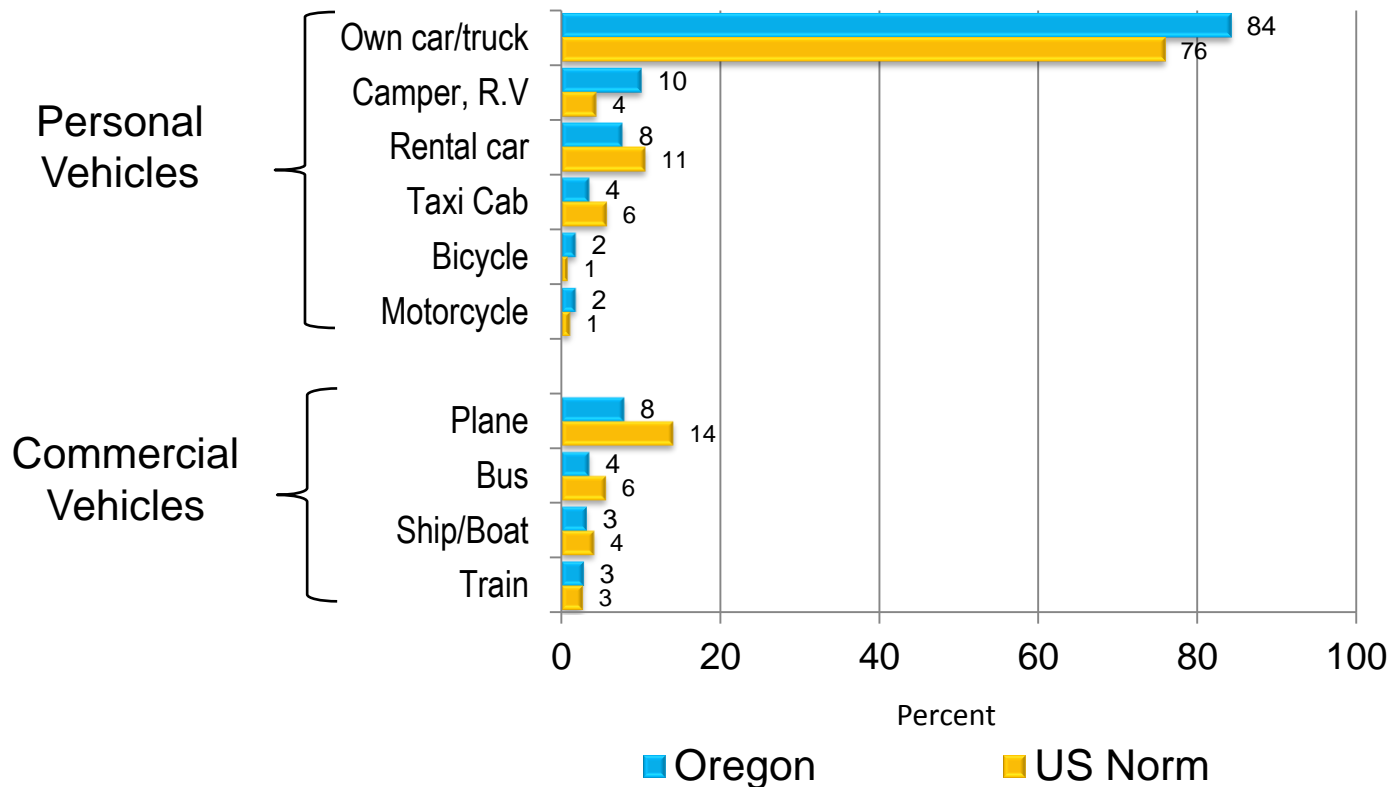
Base: Overnight Marketable Trips



# Transportation



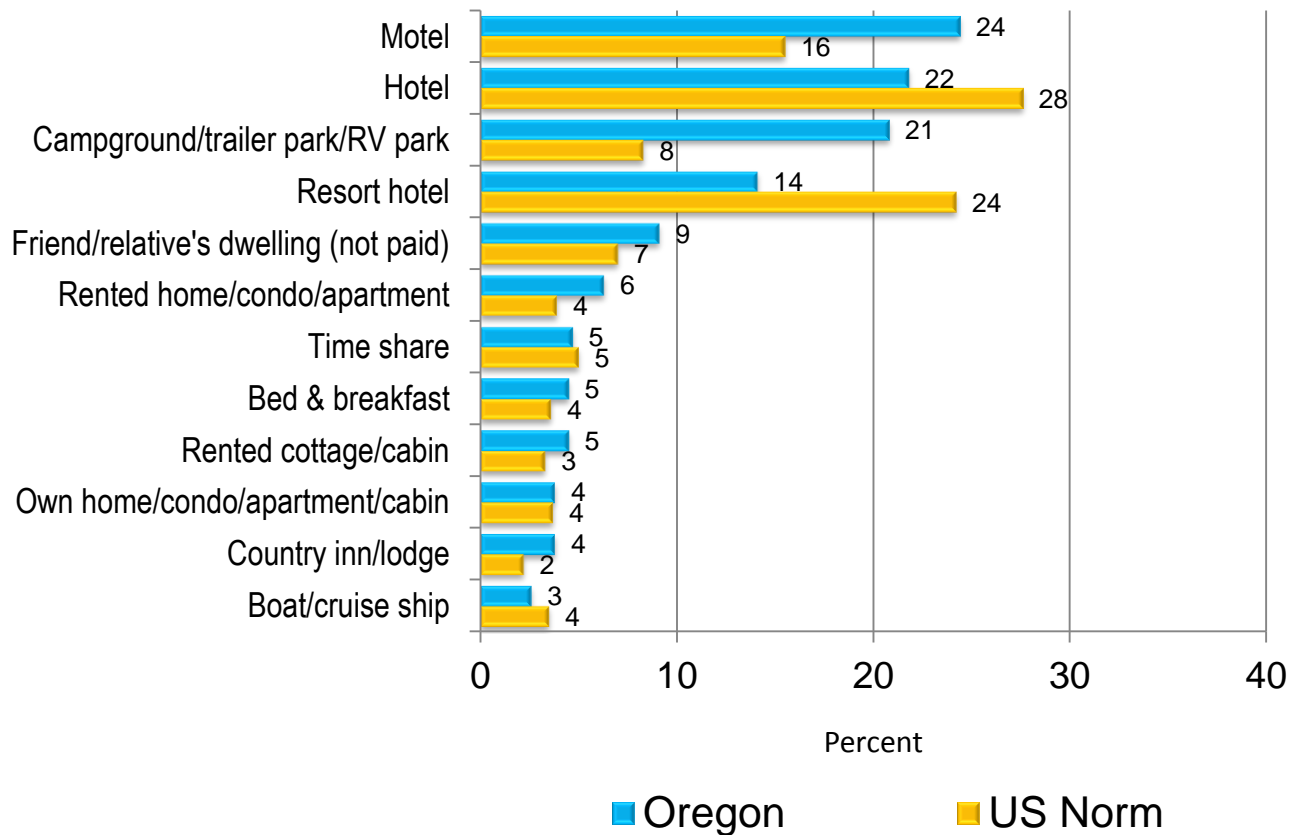
Base: Overnight Marketable Trips



# Accommodation



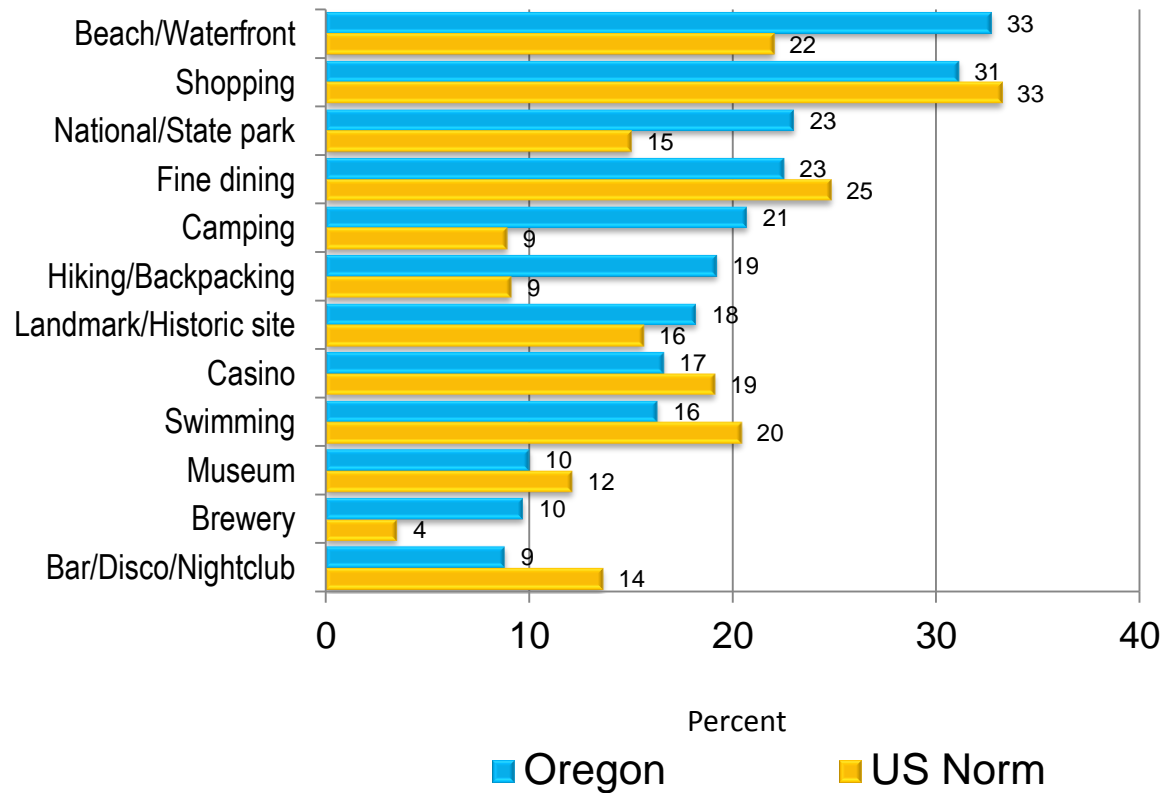
Base: Overnight Marketable Trips



# Activities and Experiences



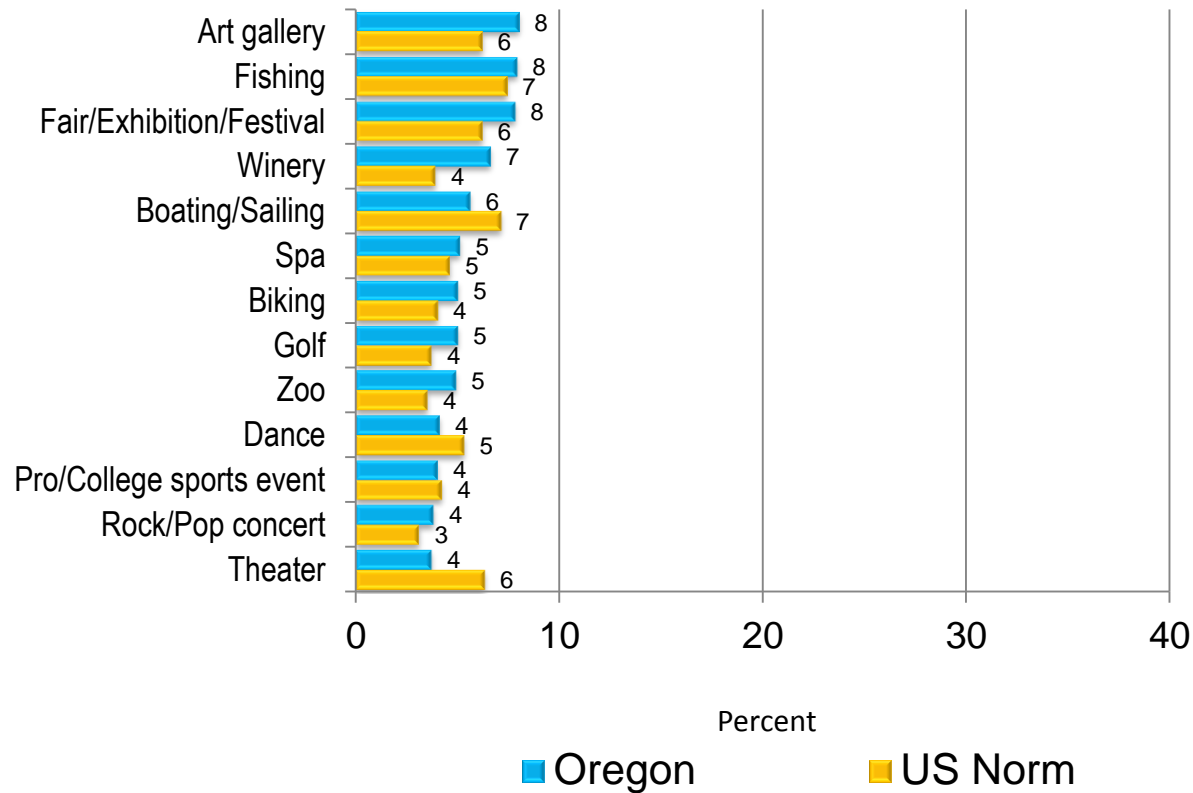
Base: Overnight Marketable Trips



# Activities and Experiences (Cont'd)



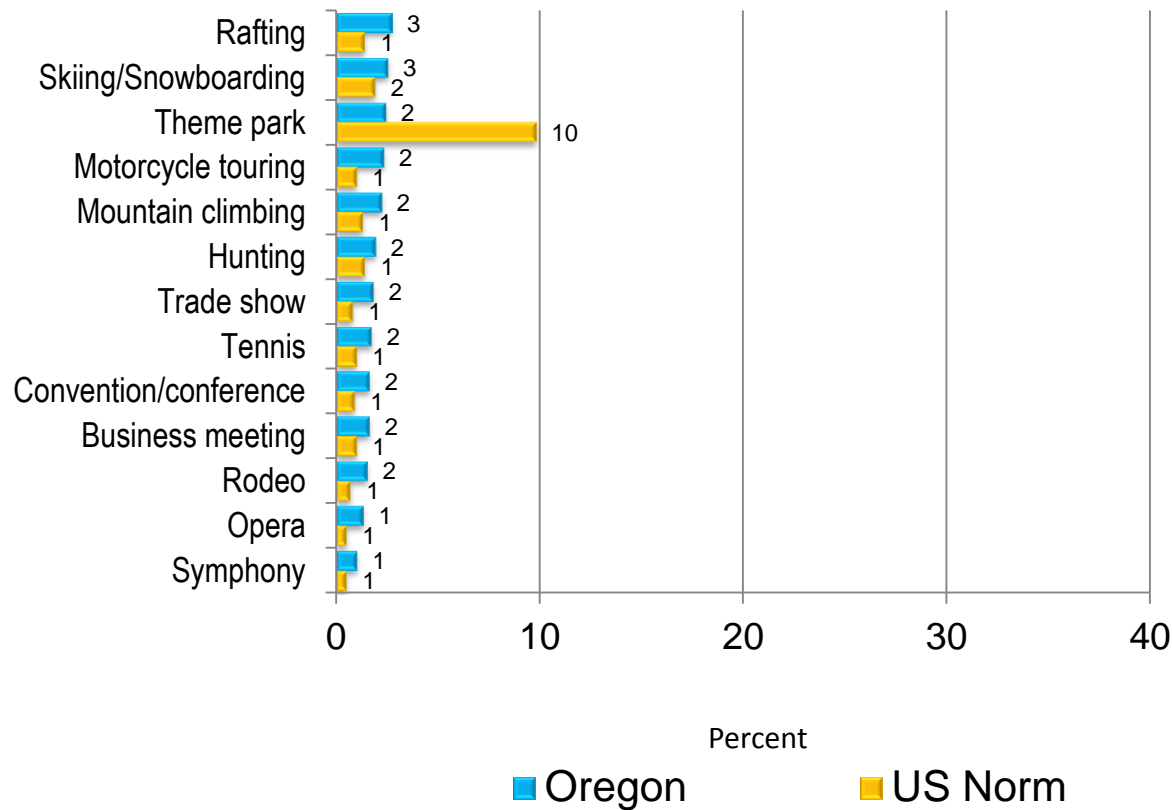
Base: Overnight Marketable Trips



# Activities and Experiences (Cont'd)



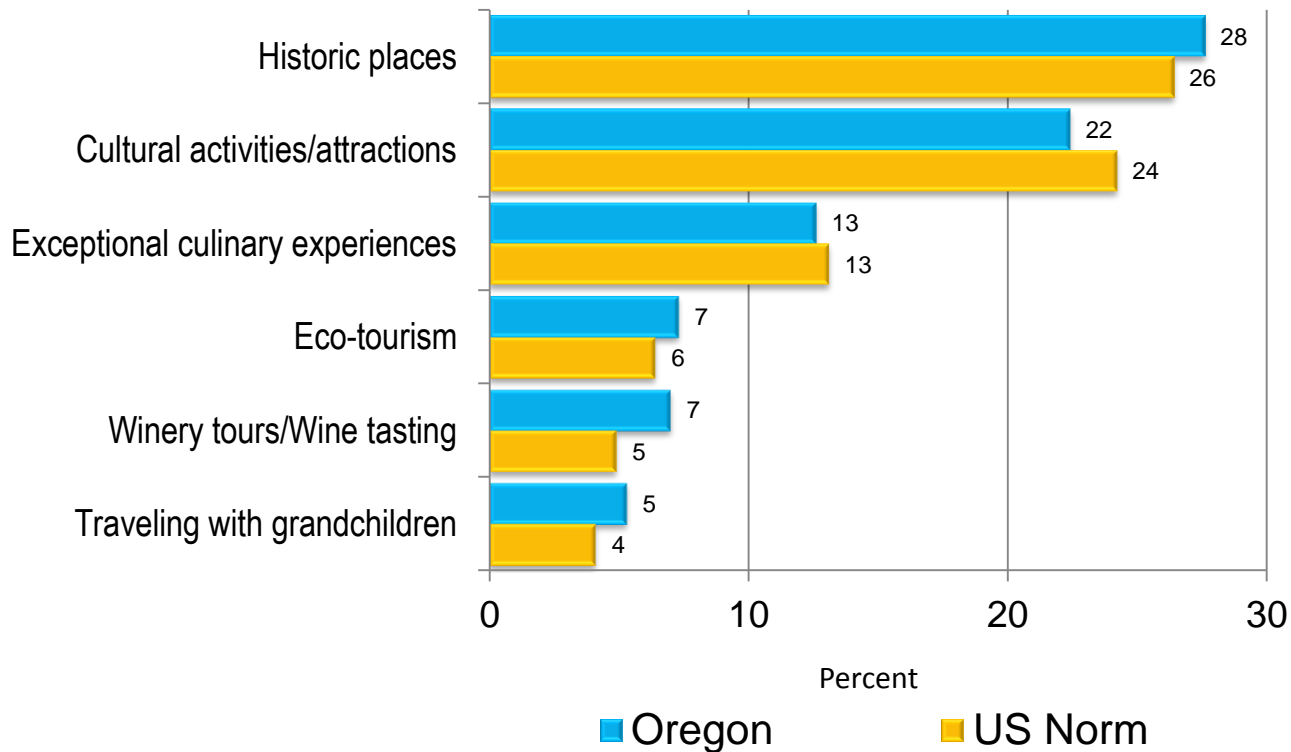
Base: Overnight Marketable Trips



# Activities of Special Interest



Base: Overnight Marketable Trips



# Day Trip Detail



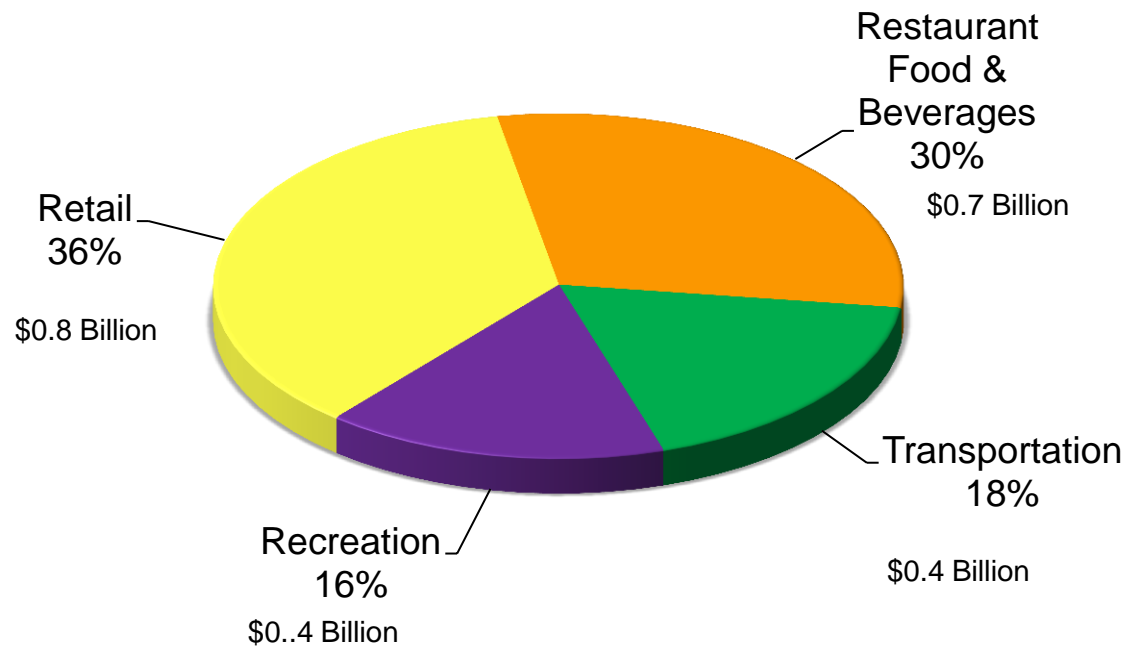


# Day Trip Expenditures

# Total Day Travel Spending — by Sector



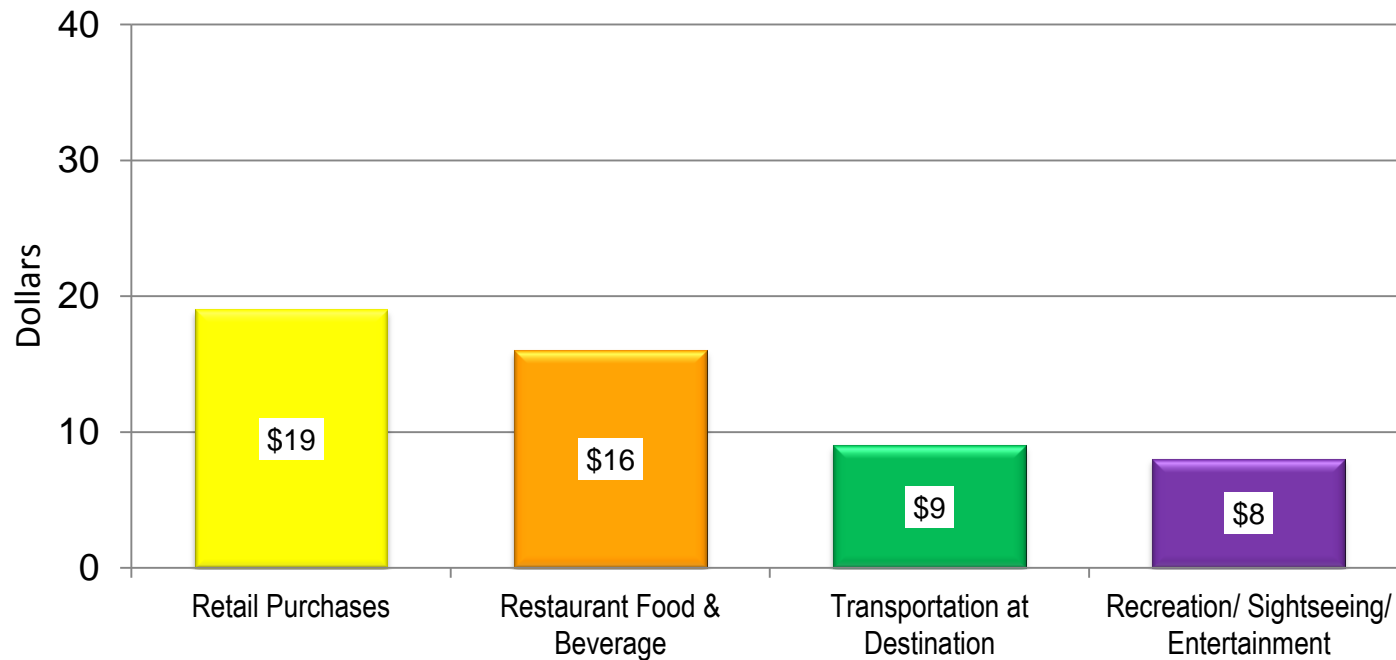
**Total Spending = \$2.3 Billion**



# Average Per Person Expenditures on Day Trips — By Sector



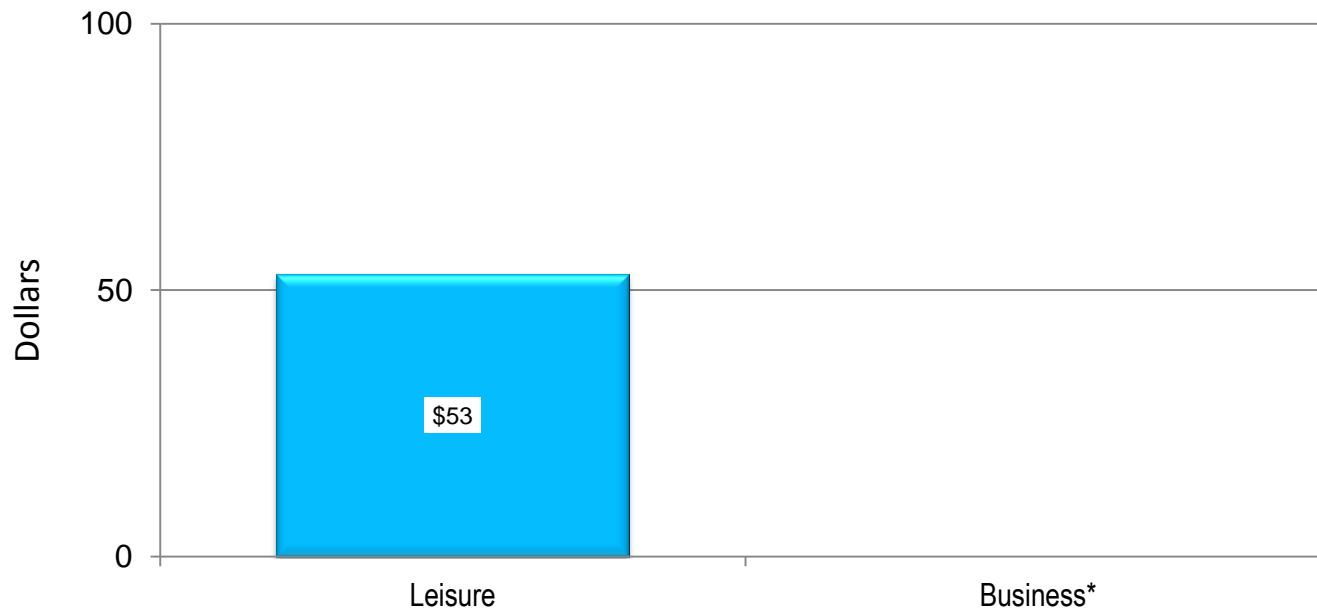
Base: Total Day Person-Trips



# Average Per Person Expenditure on Day Trips — by Trip Type



Base: Total Day Person-Trips

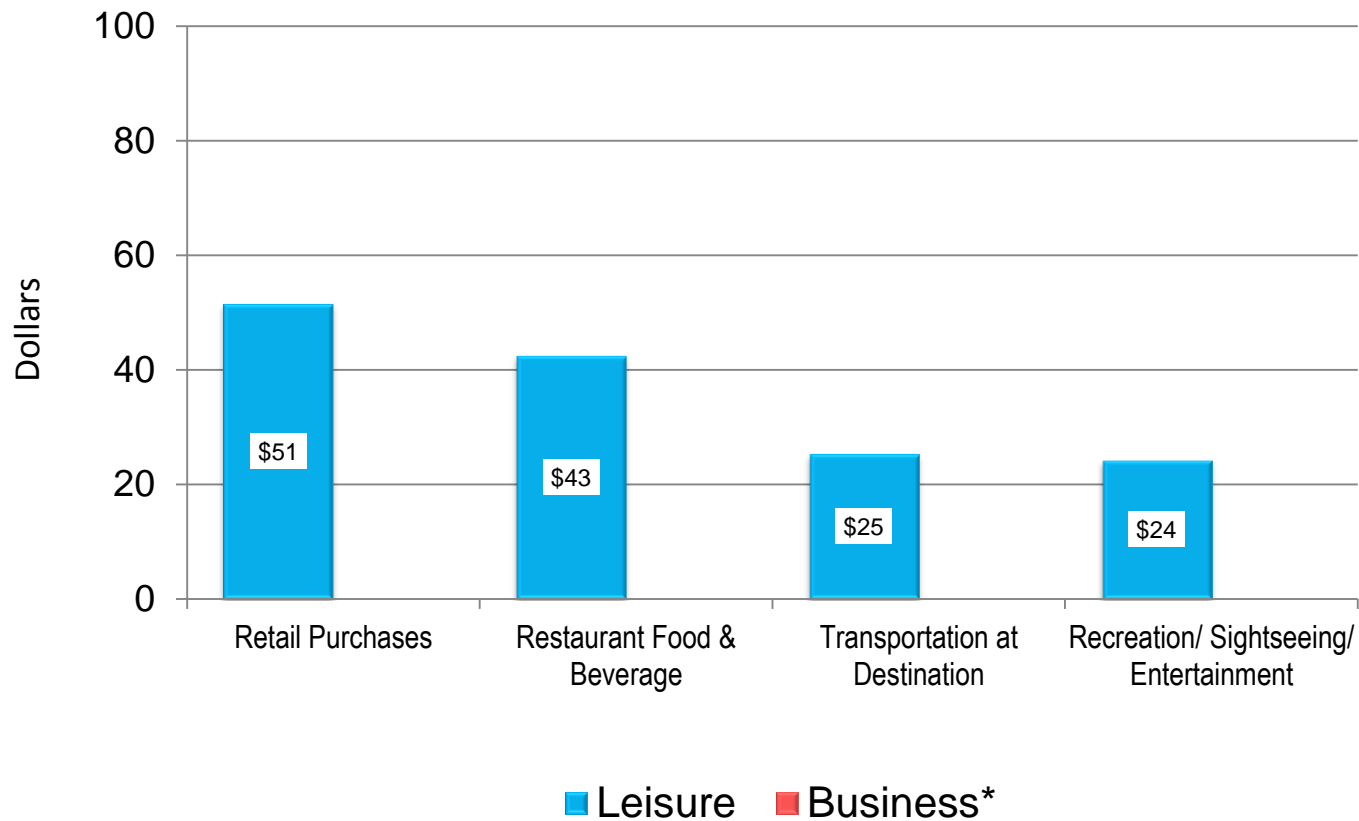


\*Low business base

# Average Per Party Expenditures on Day Trips



Base: Total Day Person-Trips



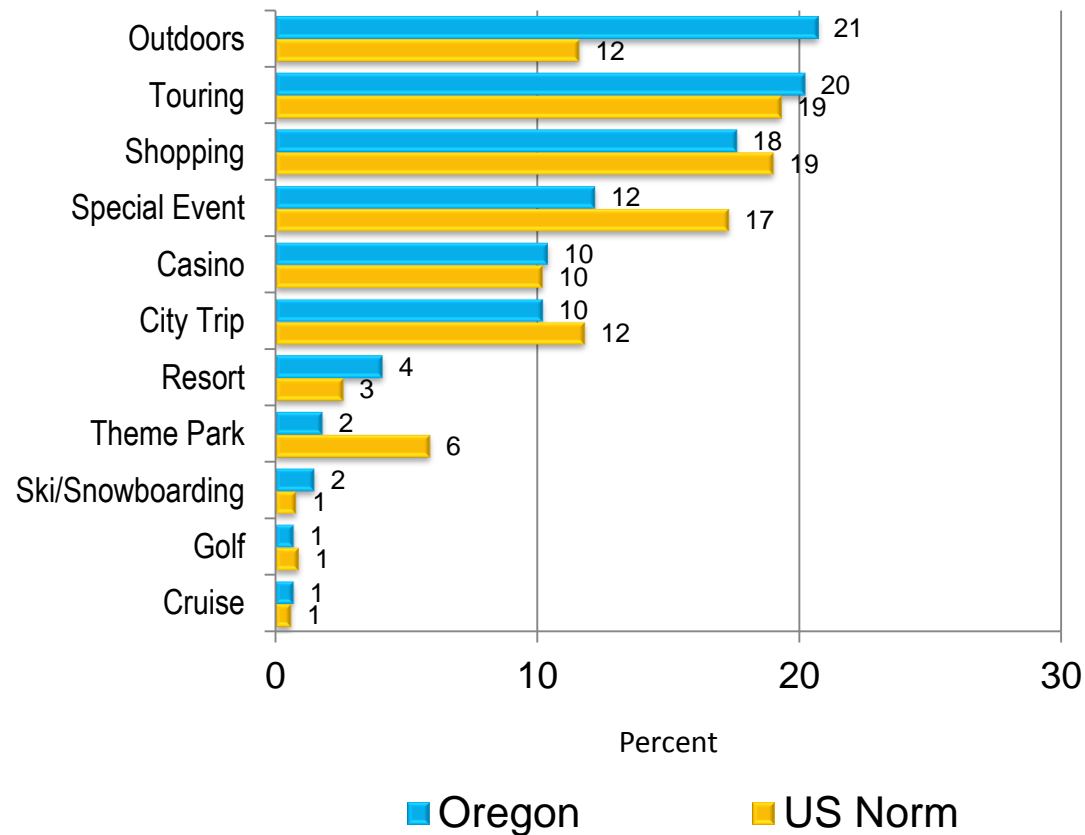
\*Low business base

# Day Trip Characteristics

# Main Purpose of Marketable Trip – Oregon vs. National Norm



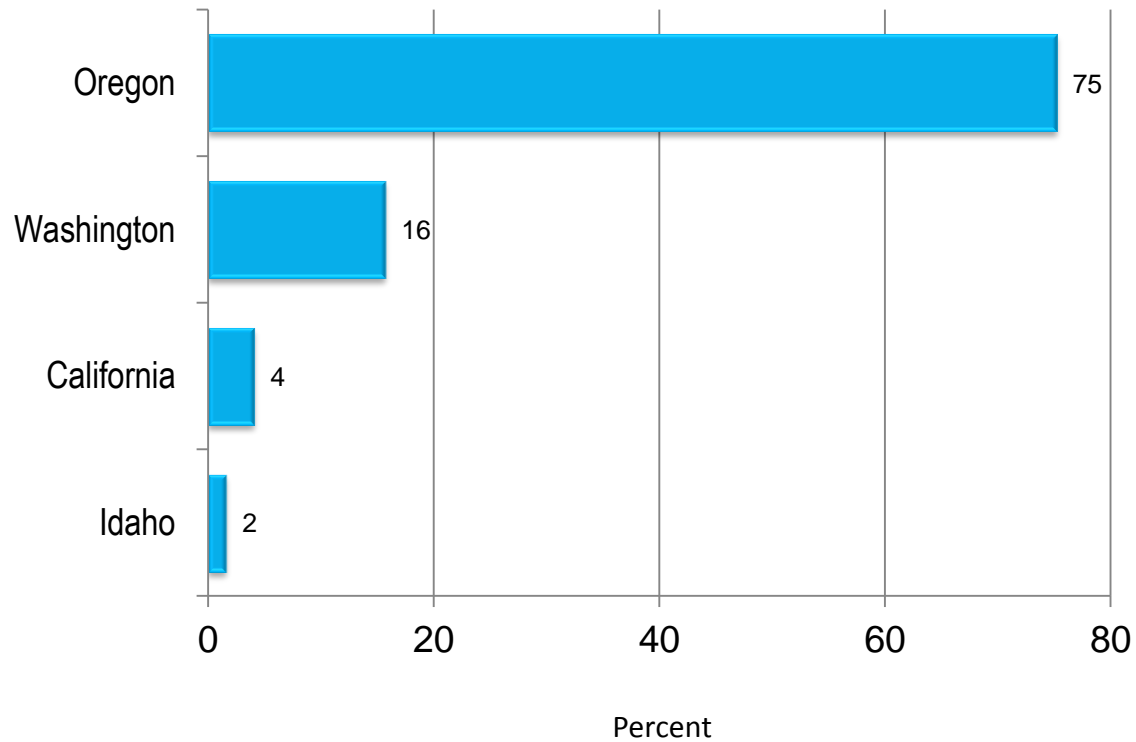
Base: Day Marketable Trips



# State Origin Of Trip



Base: Day Marketable Trips

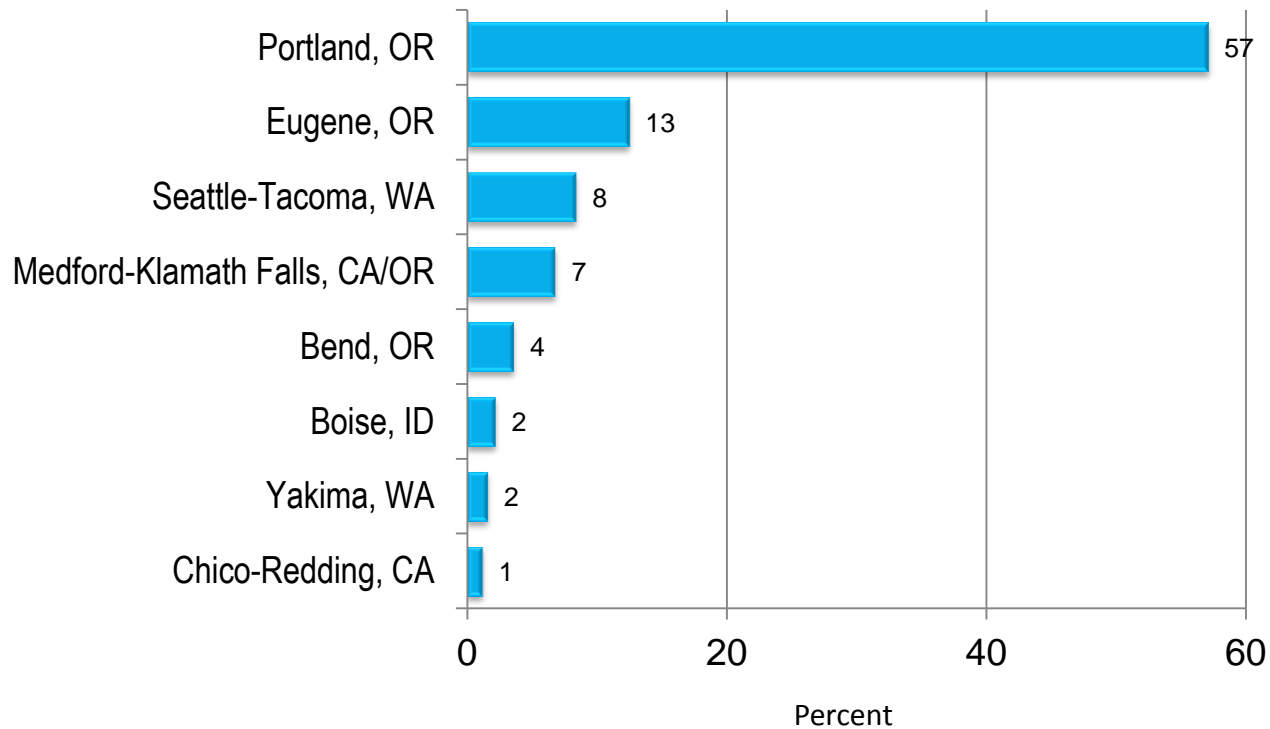




# DMA Origin Of Trip



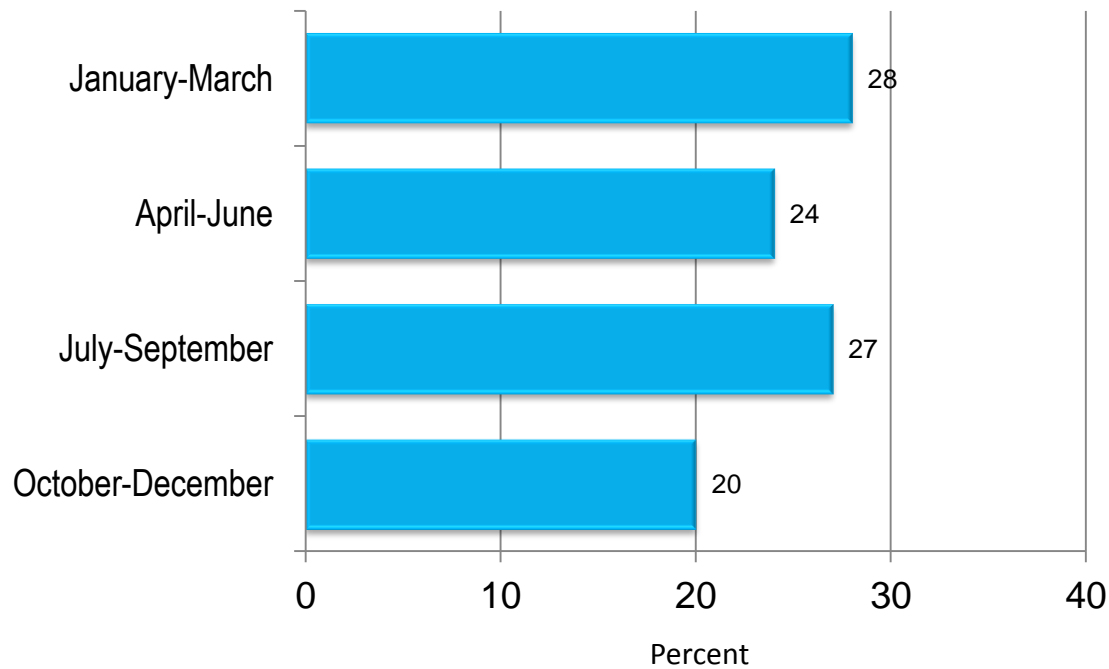
Base: Day Marketable Trips



# Season of Trip



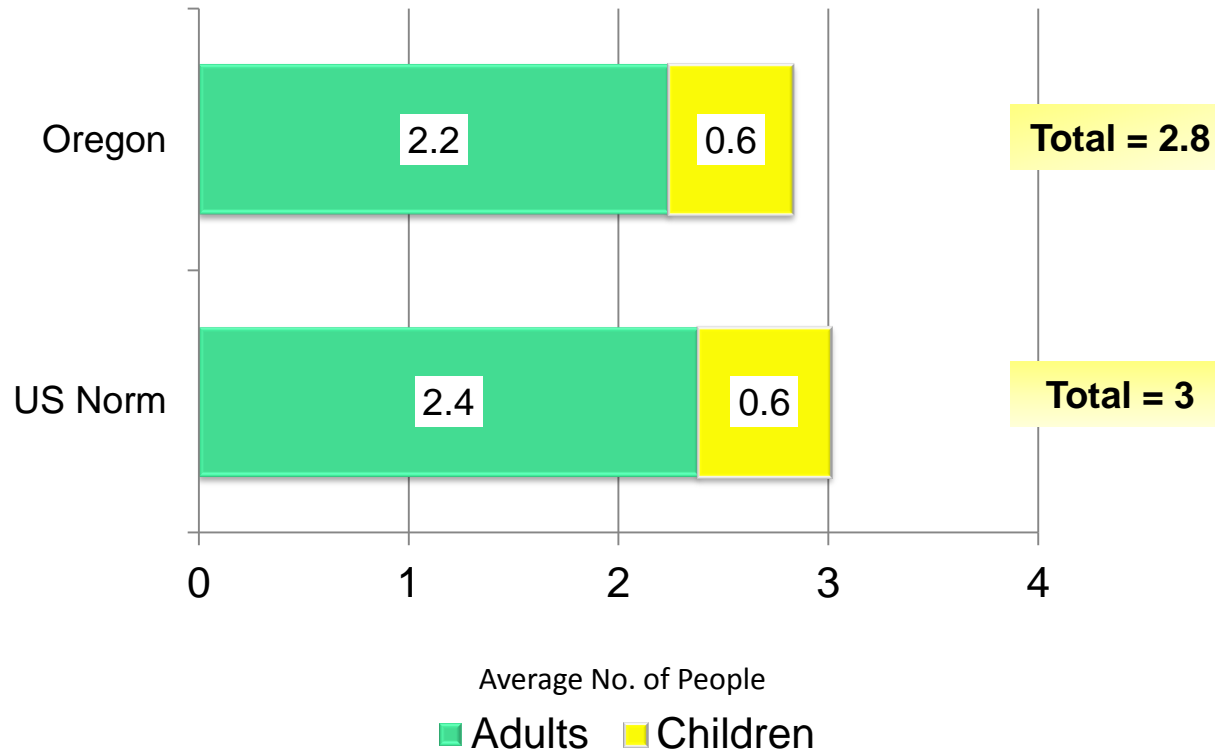
Base: Day Marketable Trips



# Size of Travel Party



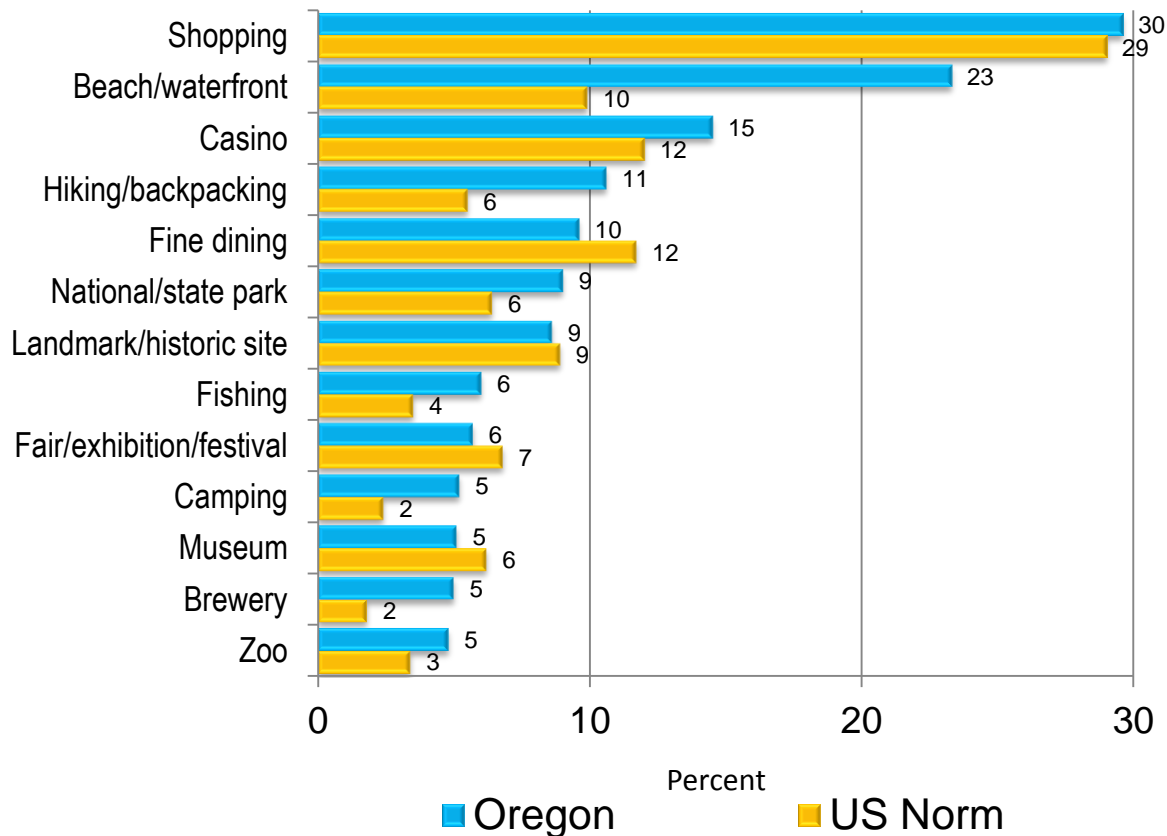
Base: Day Marketable Trips



# Activities and Experiences



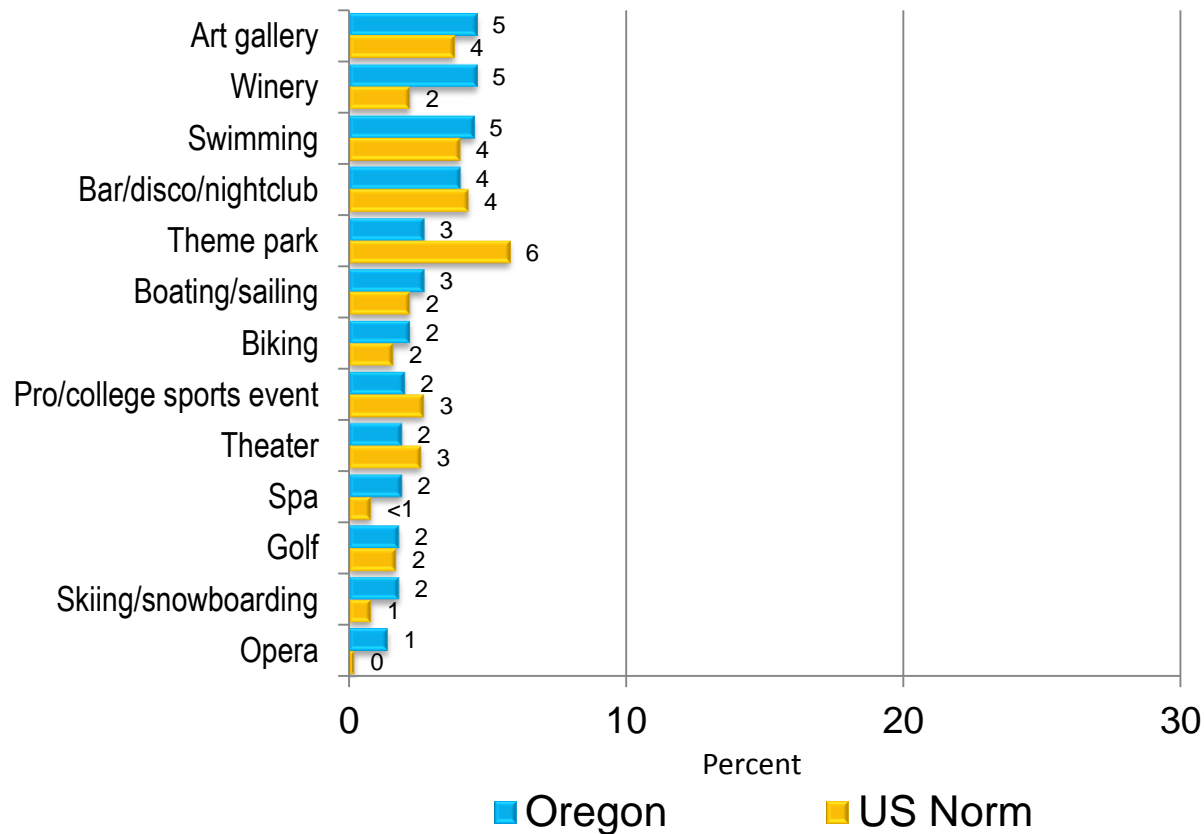
Base: Day Marketable Trips



# Activities and Experiences (Cont'd)



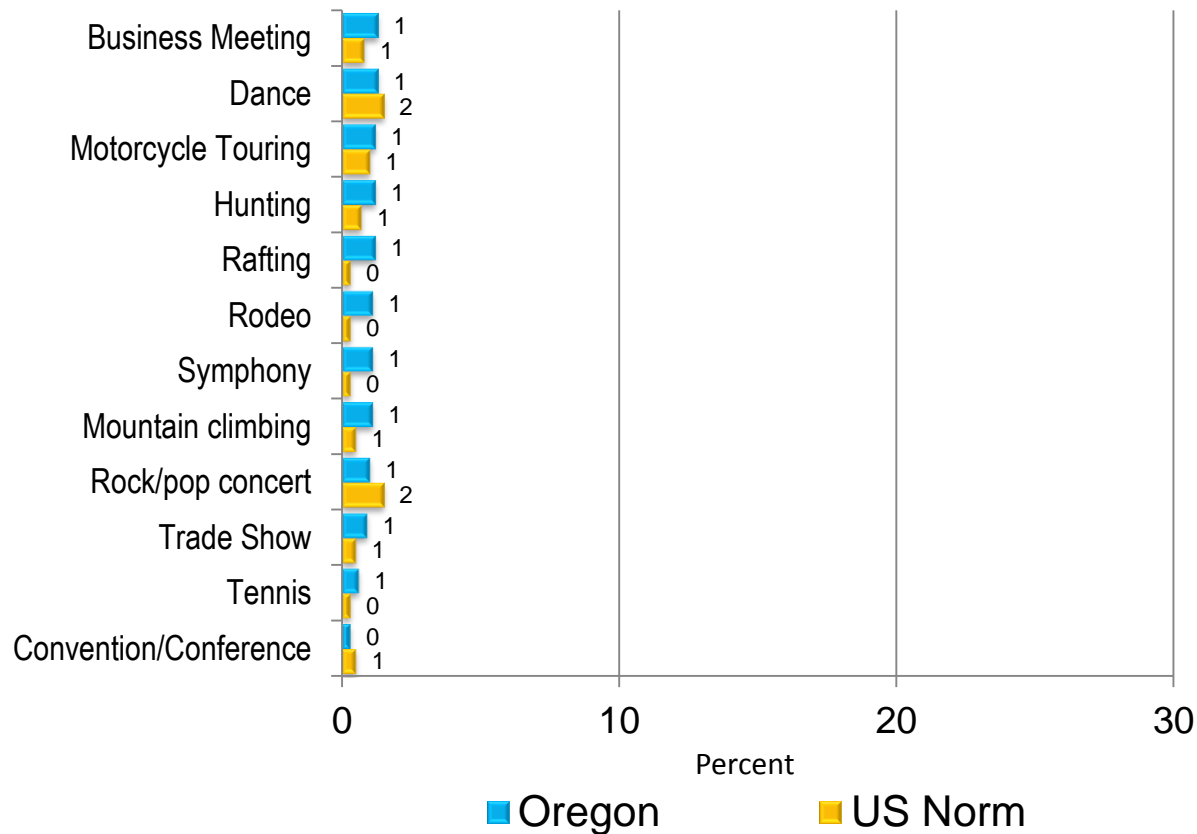
Base: Day Marketable Trips



# Activities and Experiences (Cont'd)



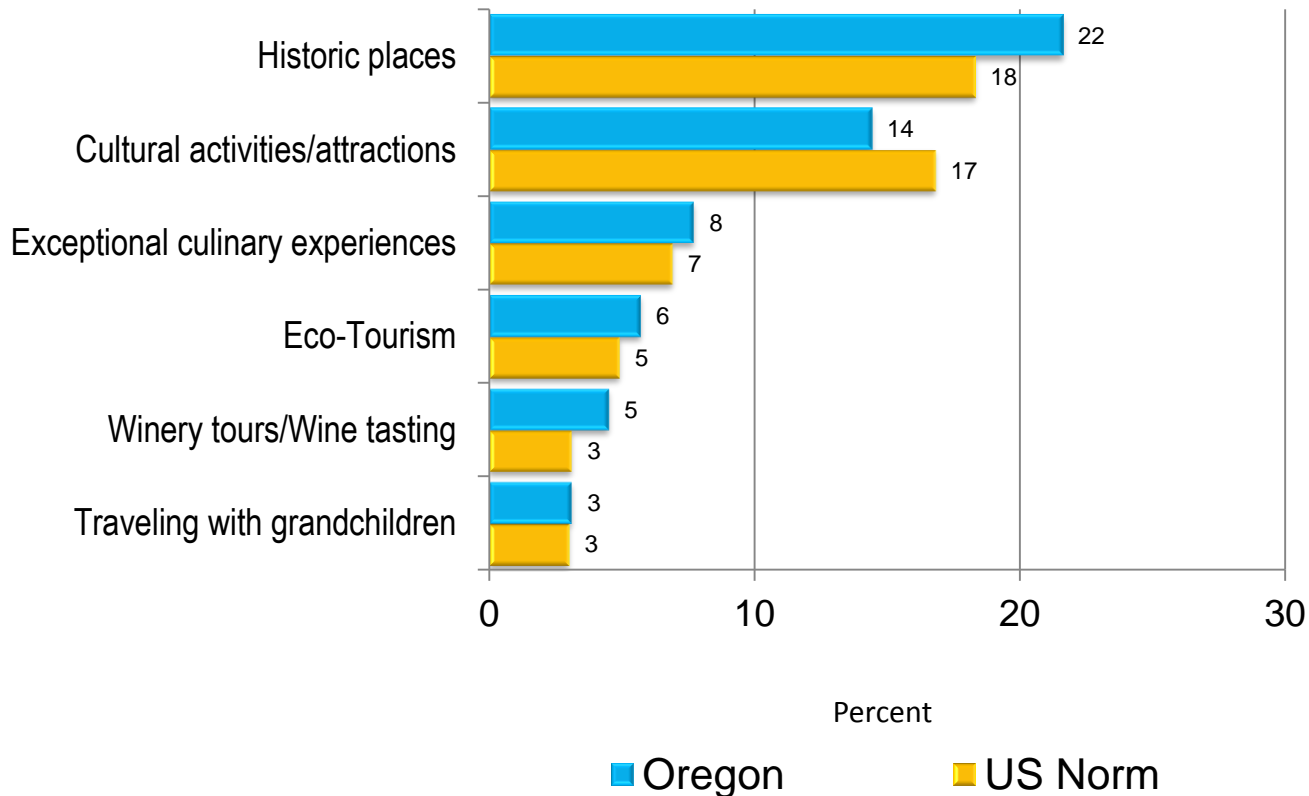
Base: Day Marketable Trips



# Activities of Special Interest



Base: Day Marketable Trips





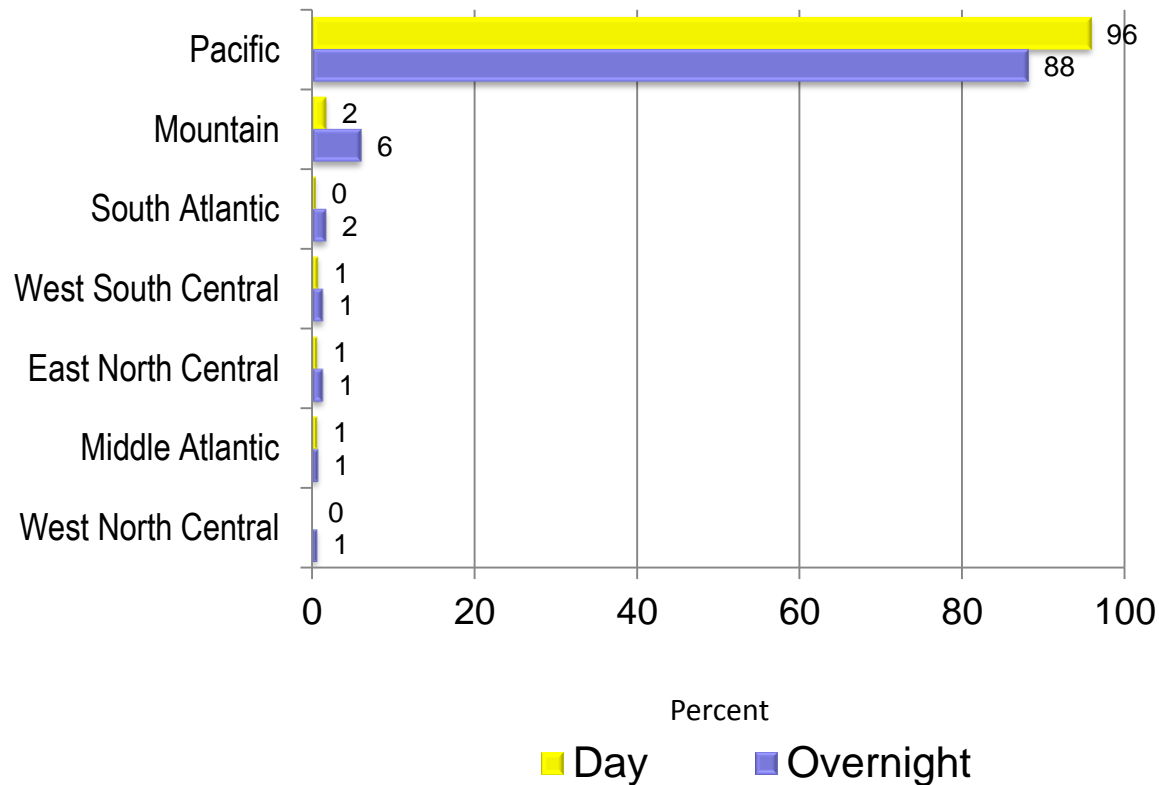
# Demographic Profile of Visitors to Oregon



# Region of Residence



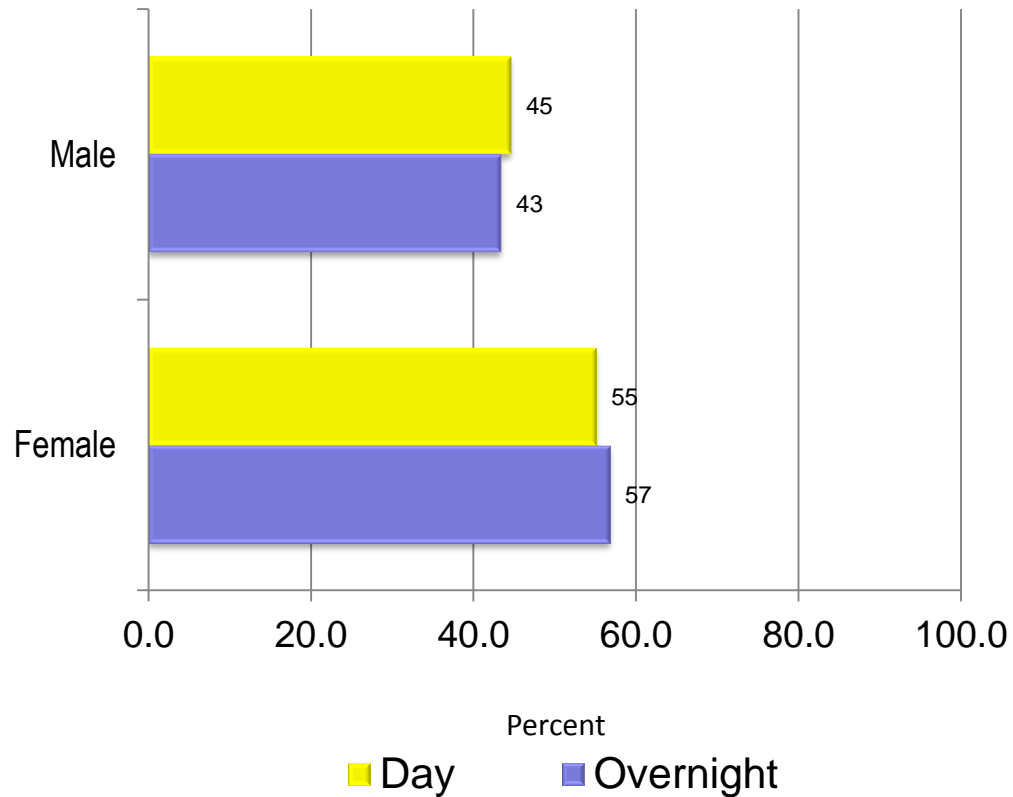
Base: Day Marketable Trips



# Gender



Base: Day Marketable Trips



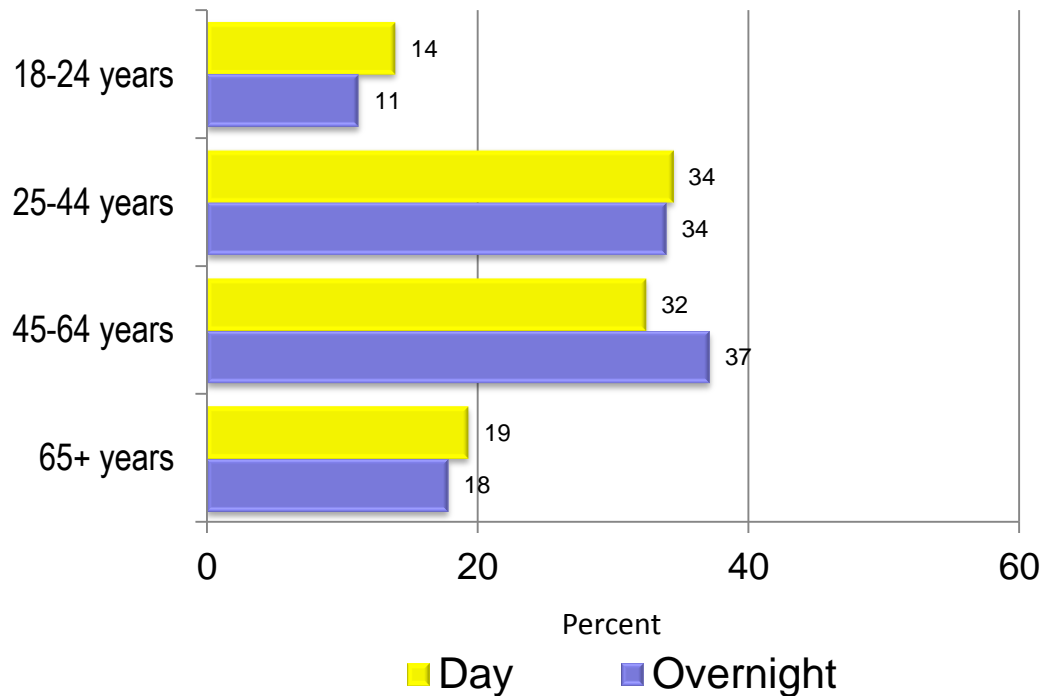
# Age



Base: Day Marketable Trips

**Average Day = 43.3**

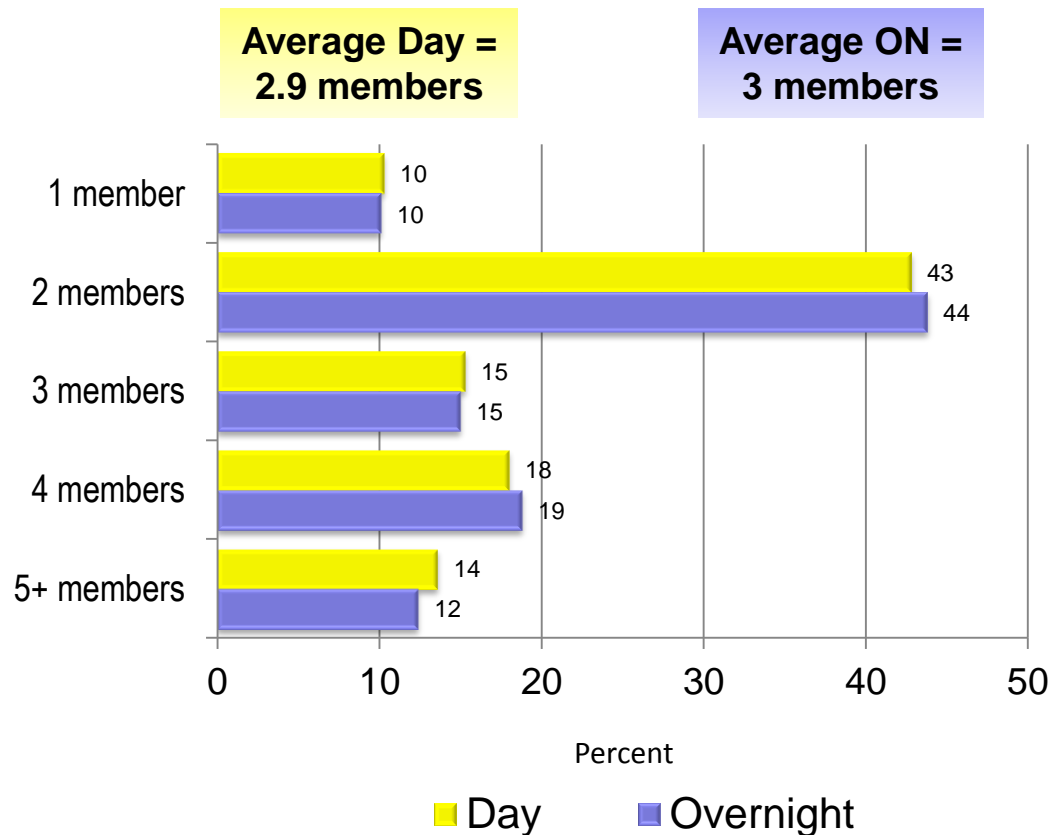
**Average ON = 46.7**



# Household Size



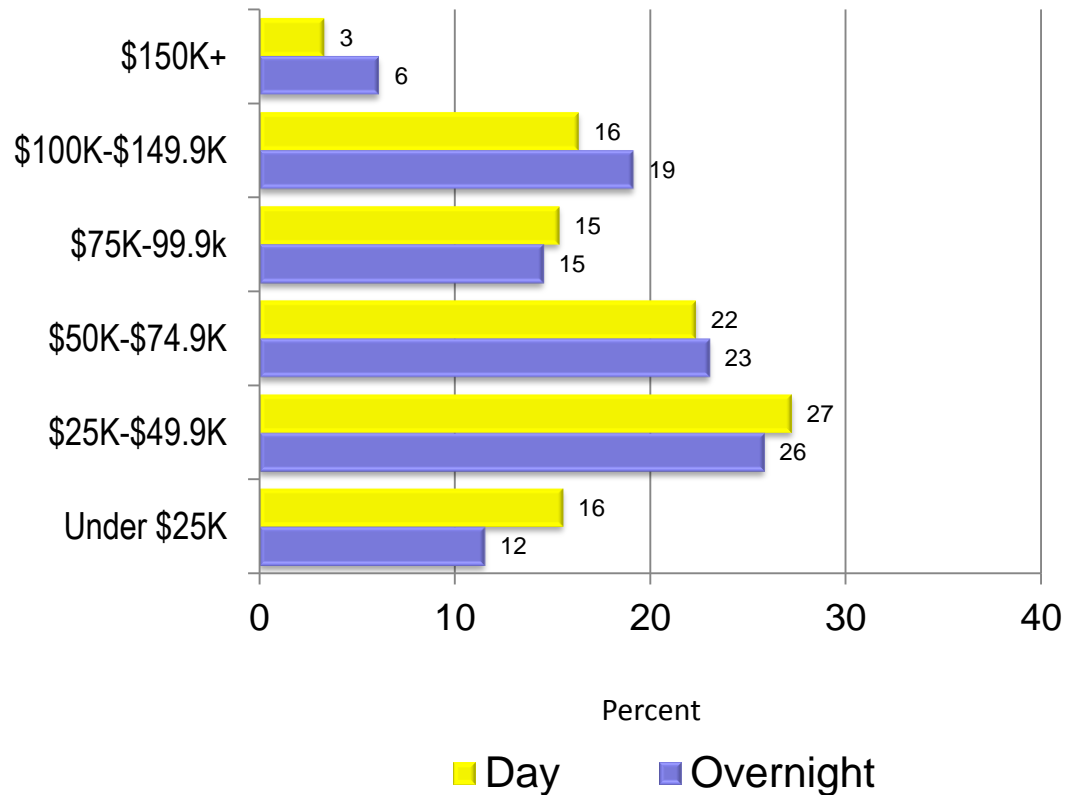
Base: Day Marketable Trips



# Income



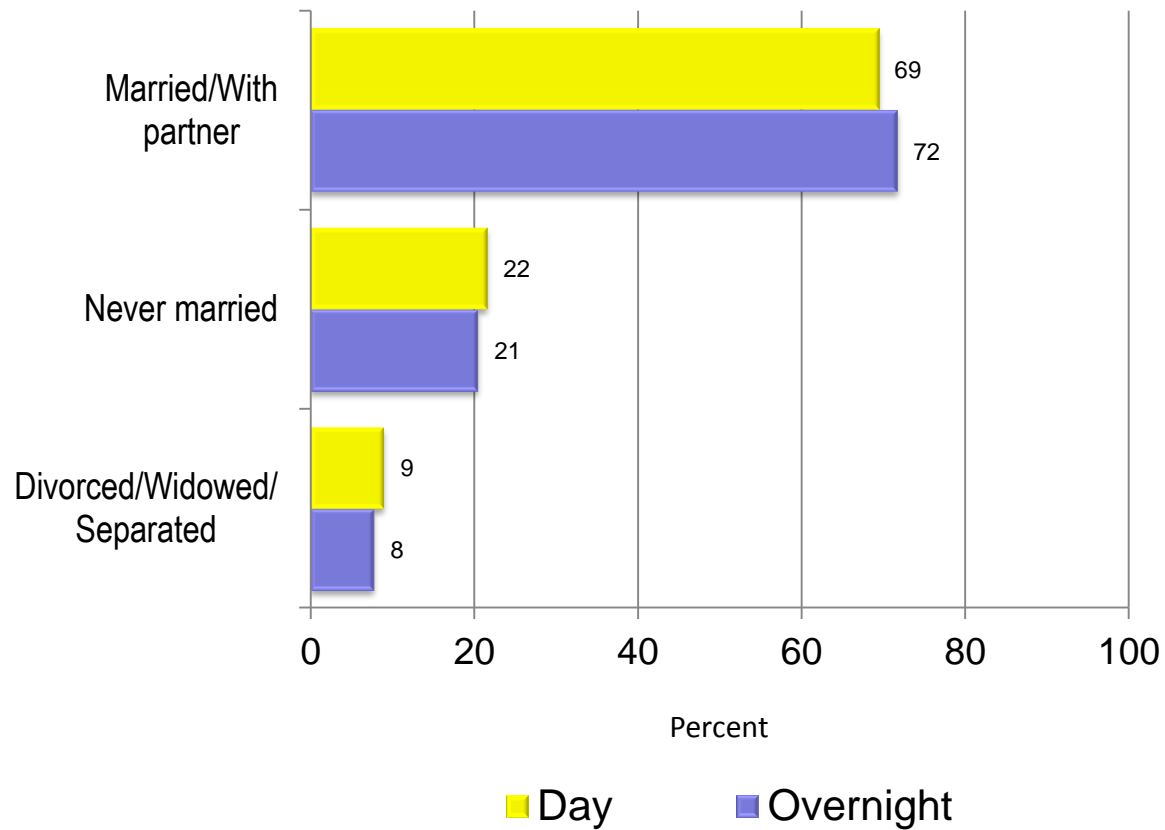
Base: Day Marketable Trips



# Marital Status



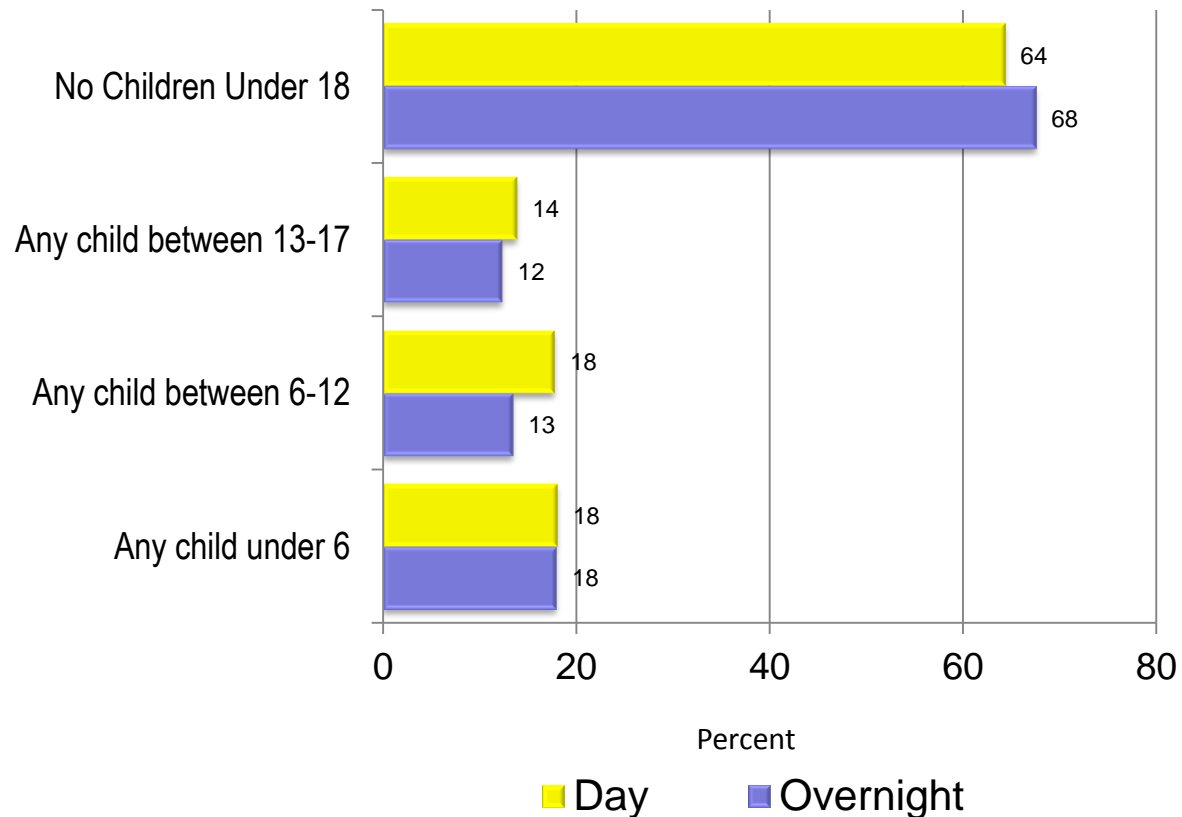
Base: Day Marketable Trips



# Children in Household



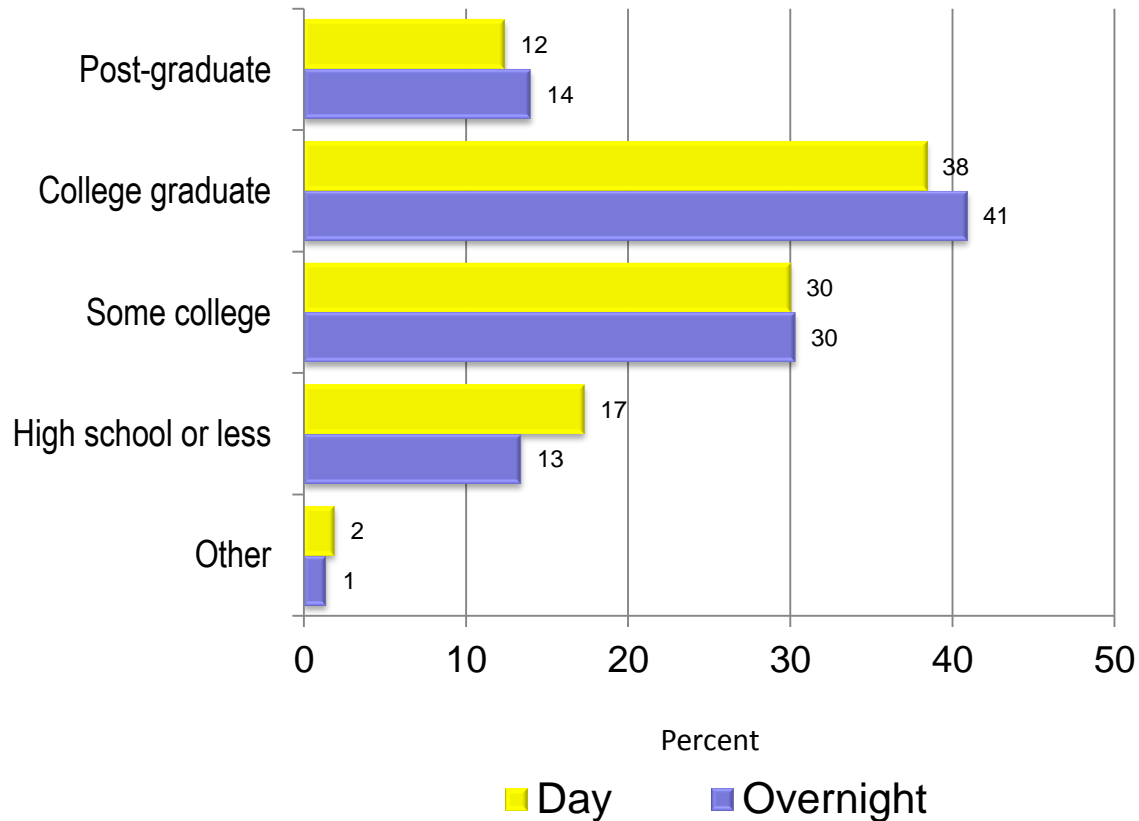
Base: Day Marketable Trips



# Education



Base: Day Marketable Trips

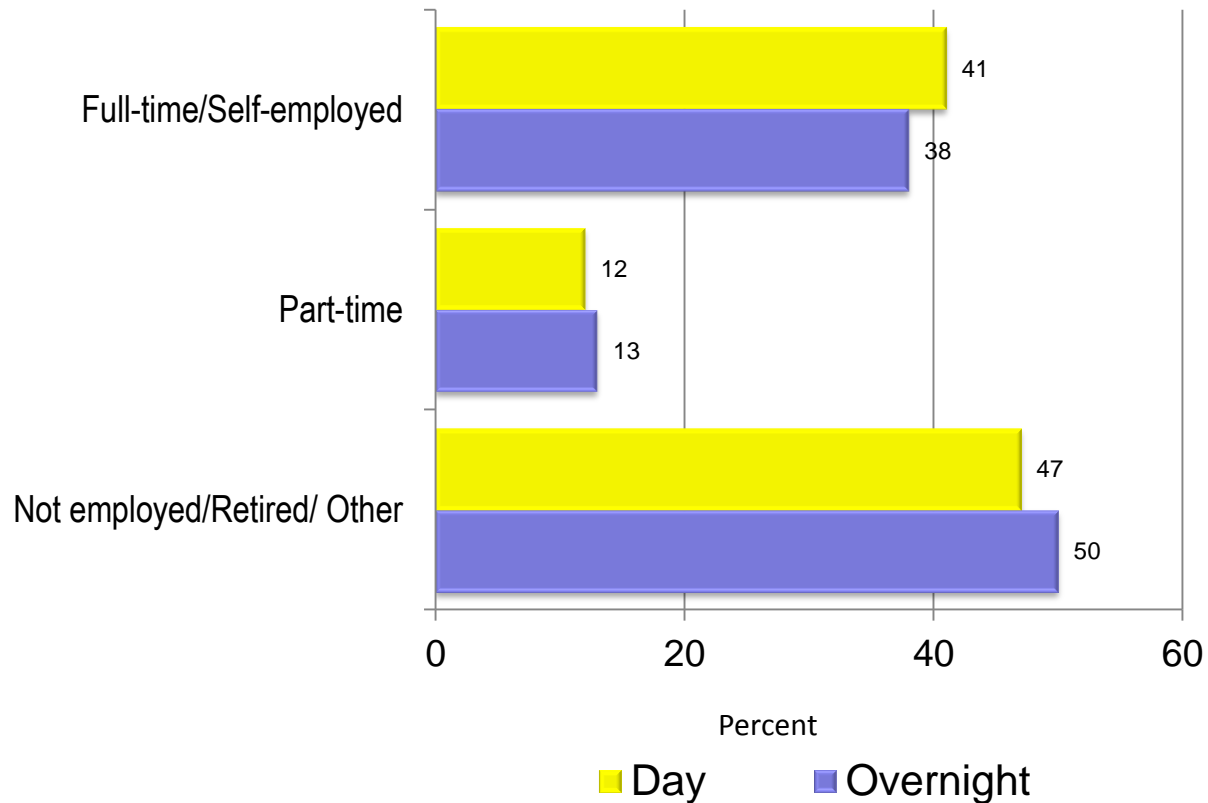




# Employment



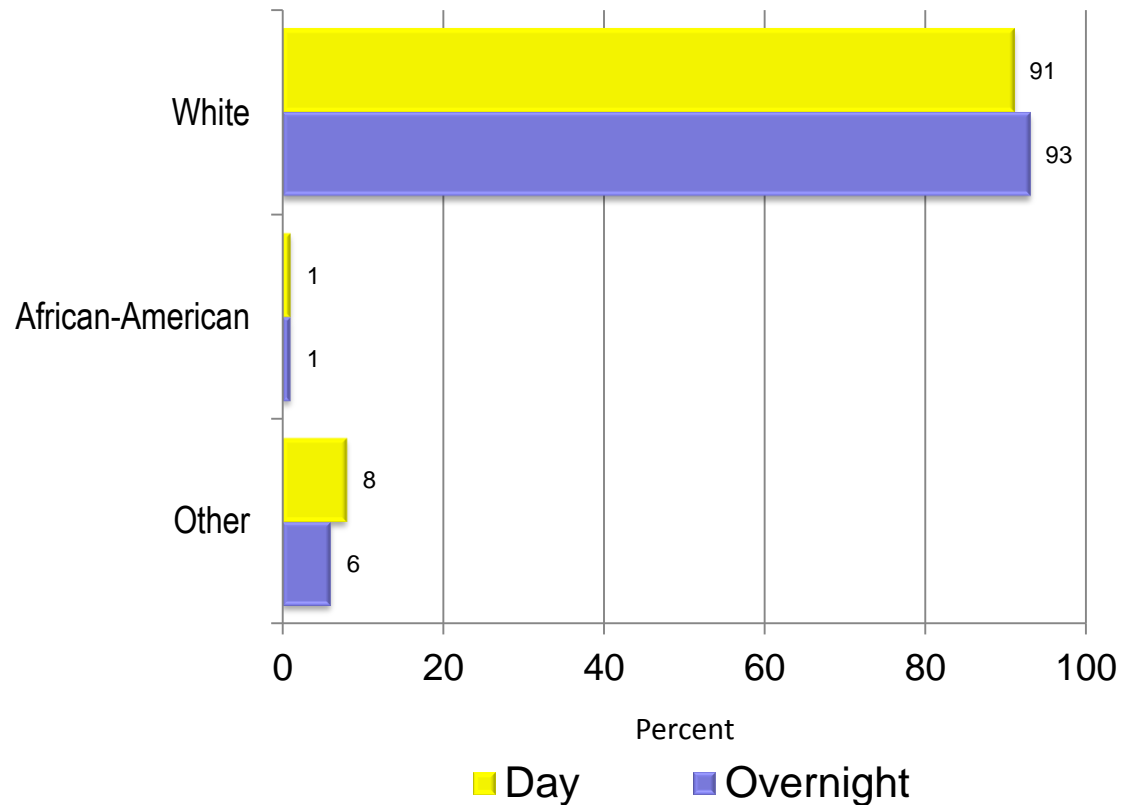
Base: Day Marketable Trips



# Race



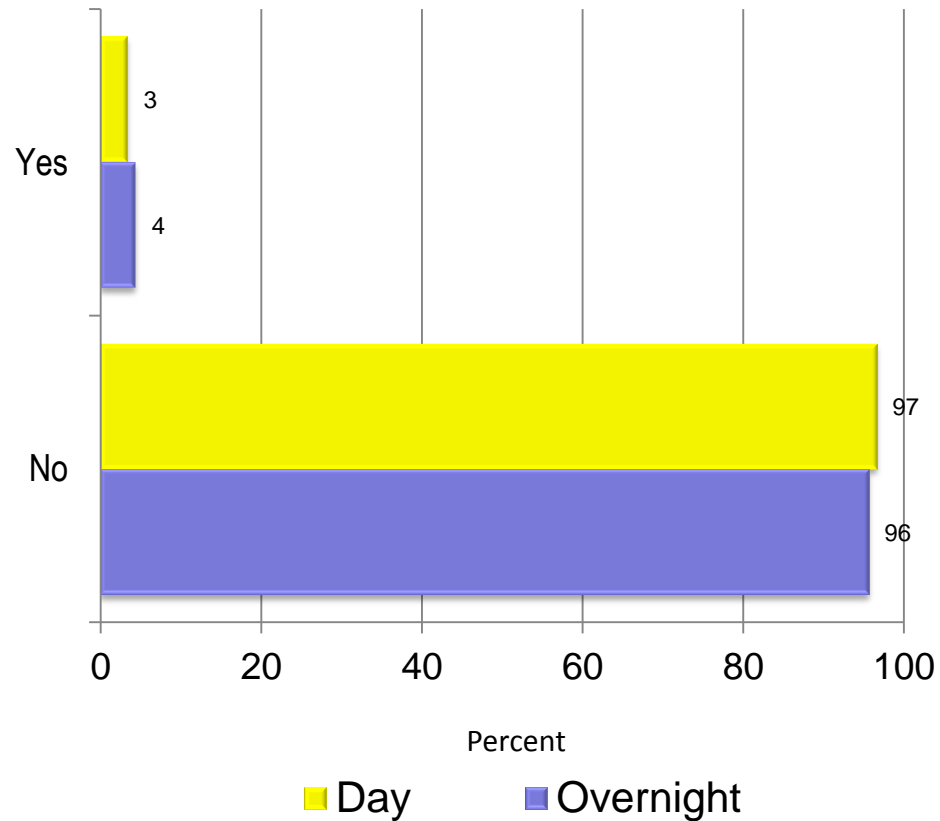
Base: Day Marketable Trips



# Hispanic Background



Base: Day 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.
- ◉ A **Person-Trip** is one trip taken by one visitor
  - ◉ *Person-trips are the key unit of measure for this report.*

# Trip-Type Segments



$$\text{Total Trips} = \text{Leisure} + \text{Business} + \text{Business-Leisure}$$

- ◉ **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