



Oregon 2011

Regional Visitor Report

The Southern Region

Introduction



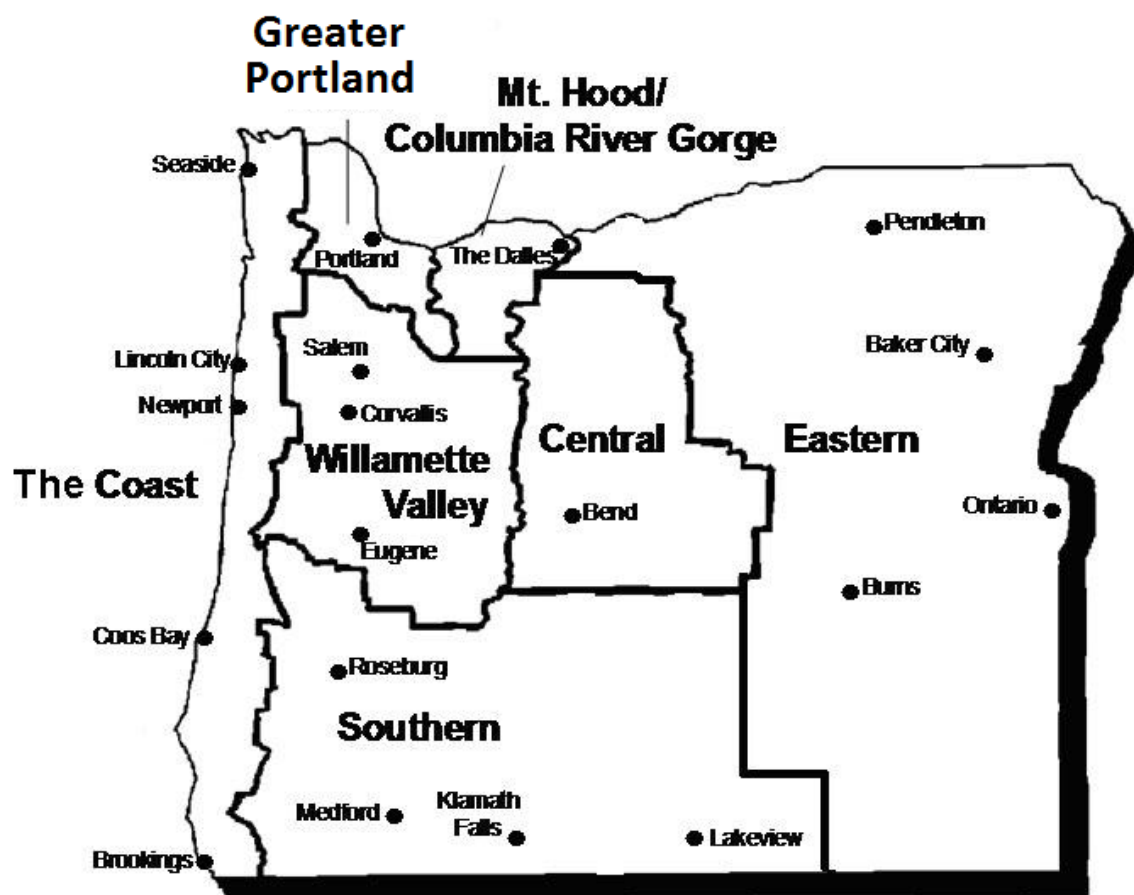
- ◉ Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- ◉ It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- ◉ This report provides:
 - ◉ *Estimates of 2011 overnight visitor volume and travel expenditures for Oregon as well as for the Southern Region in particular*
 - ◉ *Strategic intelligence about the Southern Region's overnight travel market including:*
 - ◉ *Key sources of business*
 - ◉ *Visitor profiling*
 - ◉ *Trip characteristics*

Methodology



- ◉ For each of the 2010 and 2011 travel years, a representative sample of visitors to the Southern Region was identified through Travel USA®.
- ◉ Respondents who visited Oregon were asked to identify with of the state's 7 tourism regions they spent time in with the aid of a visual map.
- ◉ Of the survey sample of 4,119 overnight trips taken to Oregon in 2010 and 2011:
 - ◉ *473 included a visit to the Southern Region*
 - ◉ *Of those, 187 were **marketable trips***

OREGON REGIONS



Analytical Note



- ◉ The results of this report are based on two time frames:
 - ◉ Market size and structure estimates for the Southern Region are reported for the 2011 travel year, as are all Oregon state norms.
 - ◉ To maximize statistical reliability, other Southern Region data (trip characteristics and visitor profiles) are based on two years' combined sample from 2010 and 2011.

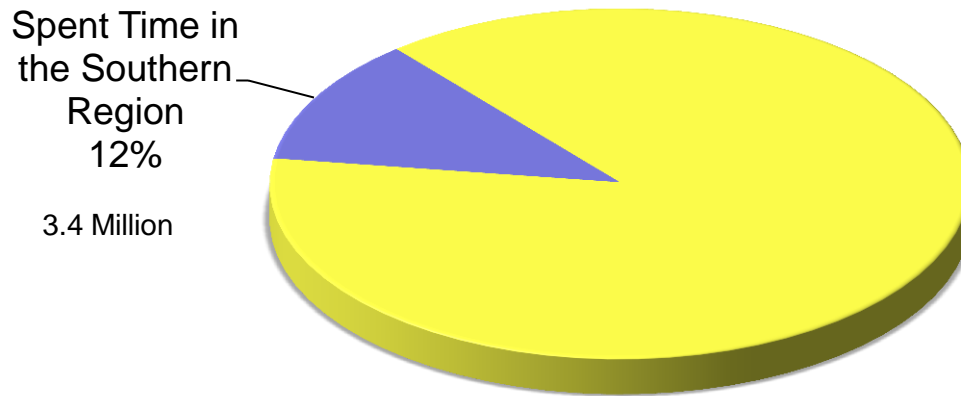
Travel Market Size & Structure

- 2011

Size of the Southern Region's Overnight Travel Market



Total Overnight Trips to Oregon* = 28.8 Million

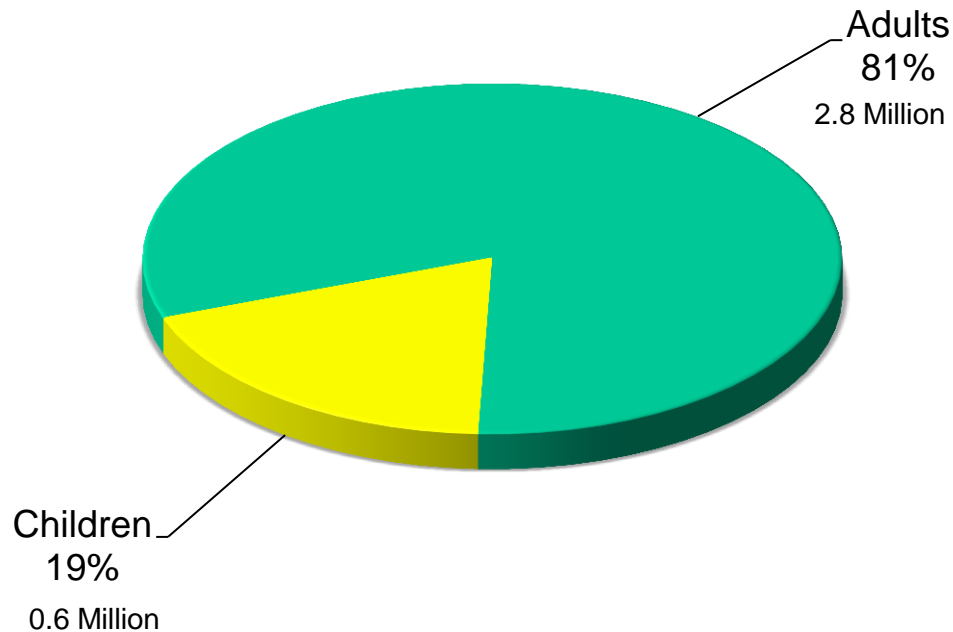


*Includes both adults and children

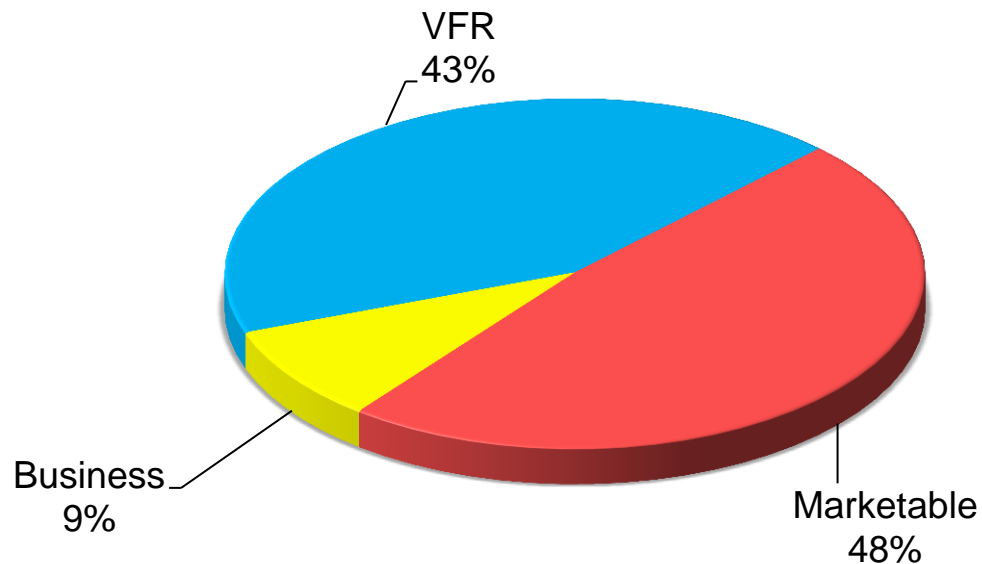
The Southern Region's Overnight Travel Market — Adults vs. Children



Total Overnight Trips to the Southern Region = 3.4 Million



The Southern Region's Overnight Travel Market by Trip Purpose

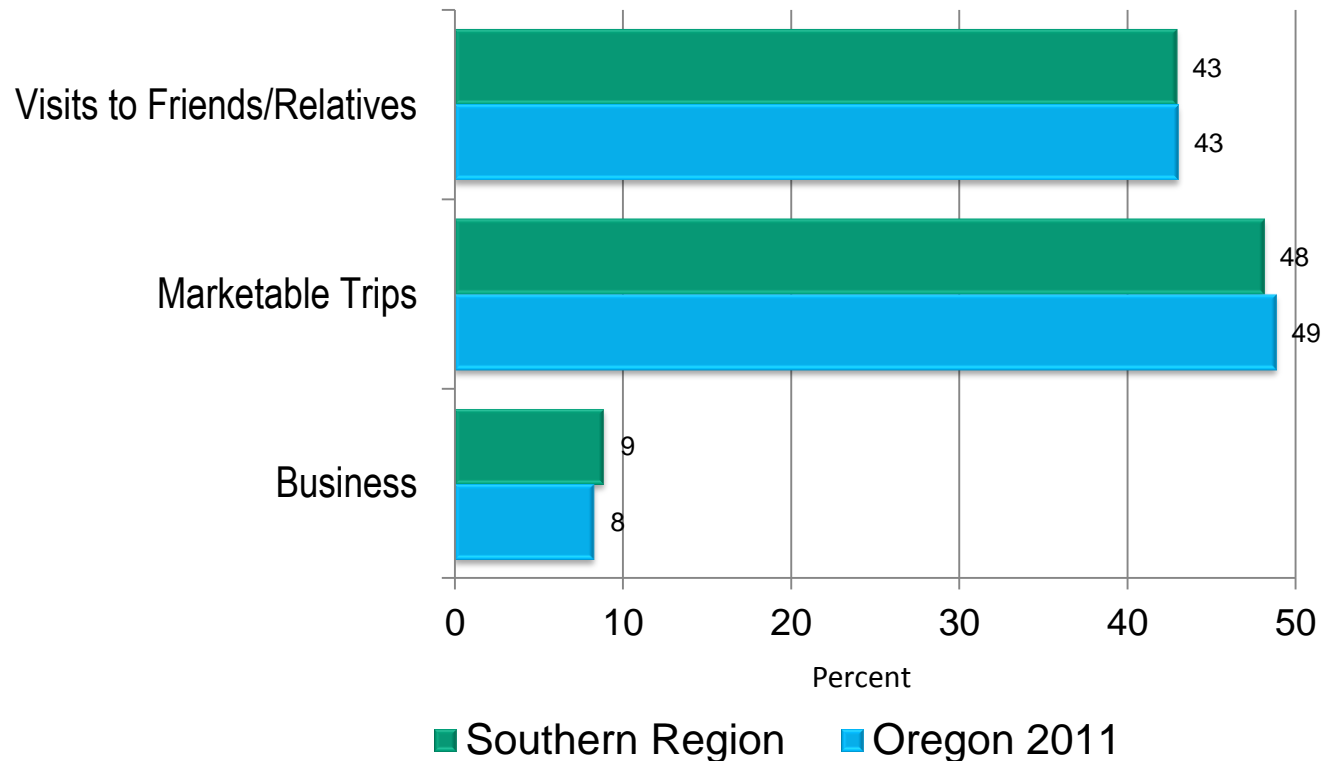


*Marketable includes Business-Leisure

Purpose of Trip — The Southern Region vs. Oregon State



Base: 2011 Overnight Trips

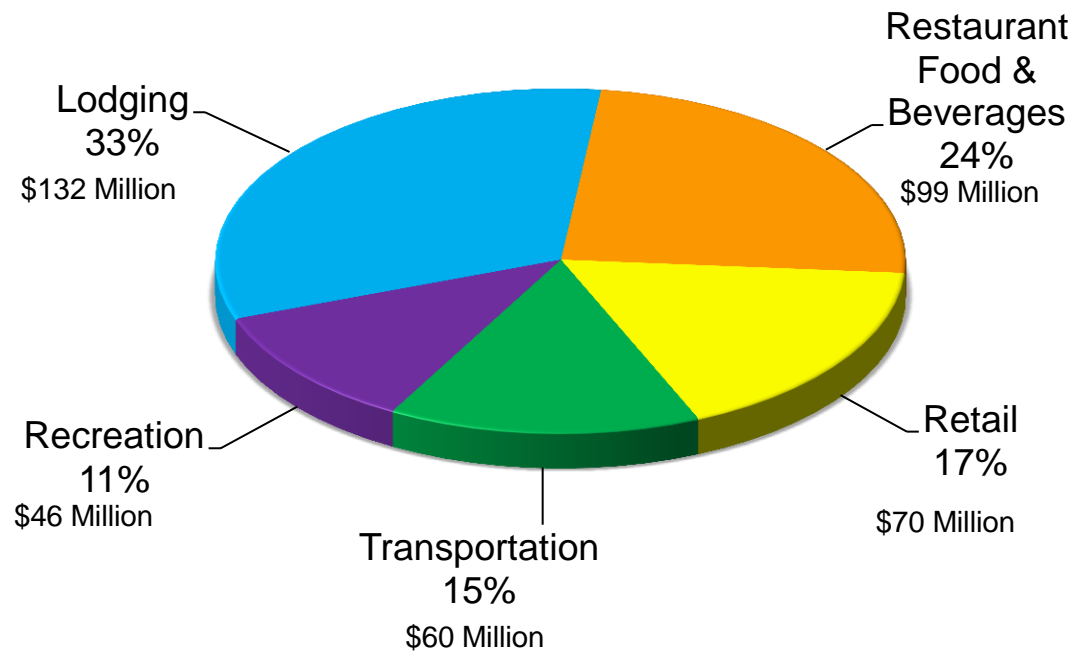


*Marketable includes Business-Leisure

2011 Overnight Spending — by Sector



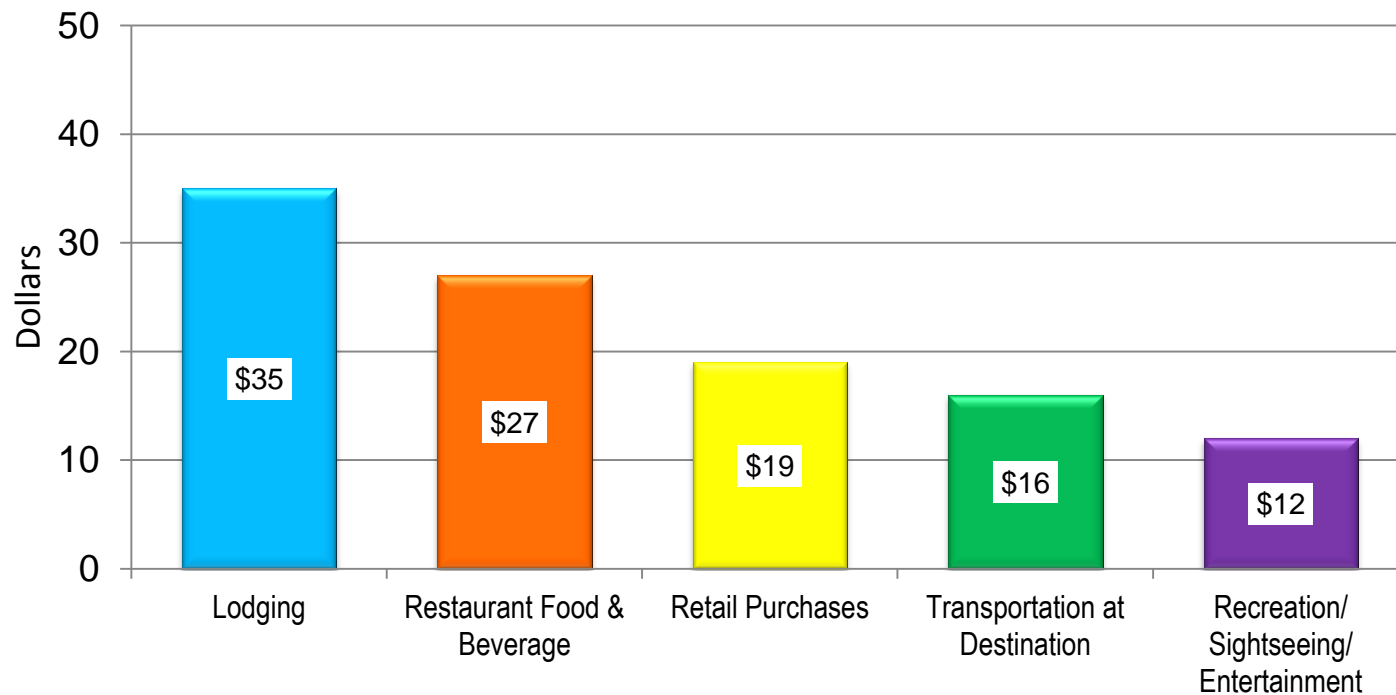
2011 Southern Region Spending = \$407 Million



Average Per Person Expenditures on Overnight Trips — By Sector



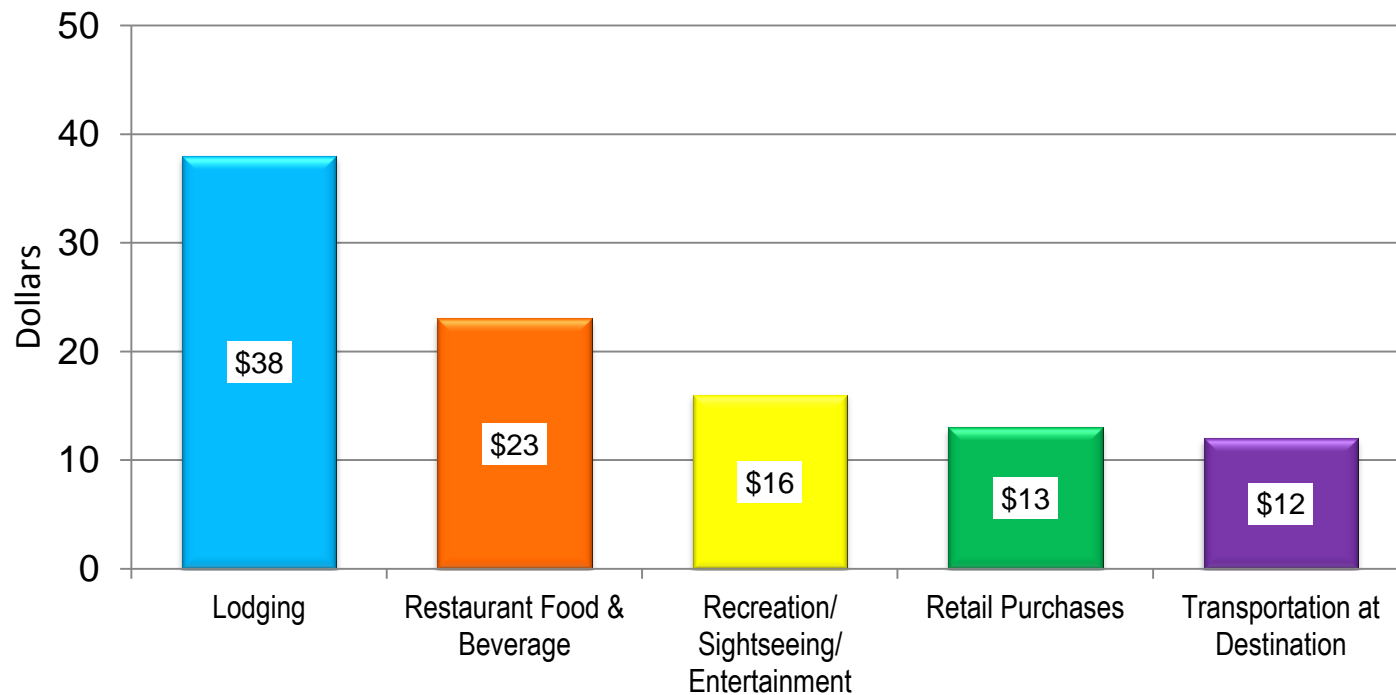
Base: Total Overnight Person-Trips



Average Per Person Expenditures on Overnight Marketable Trips — By Sector



Base: 2011 Overnight Marketable Trips

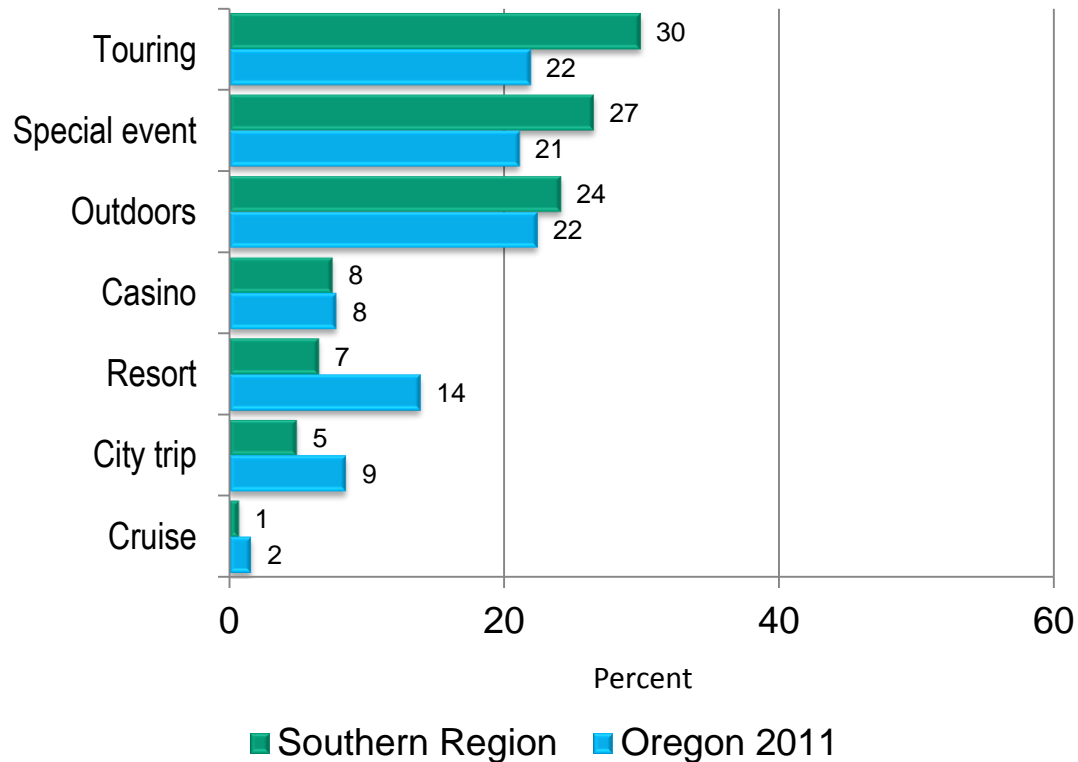


Marketable Trip Characteristics and Visitor Profile – 2010/2011

Main Purpose of Marketable Trip — Southern Region vs. State Norm



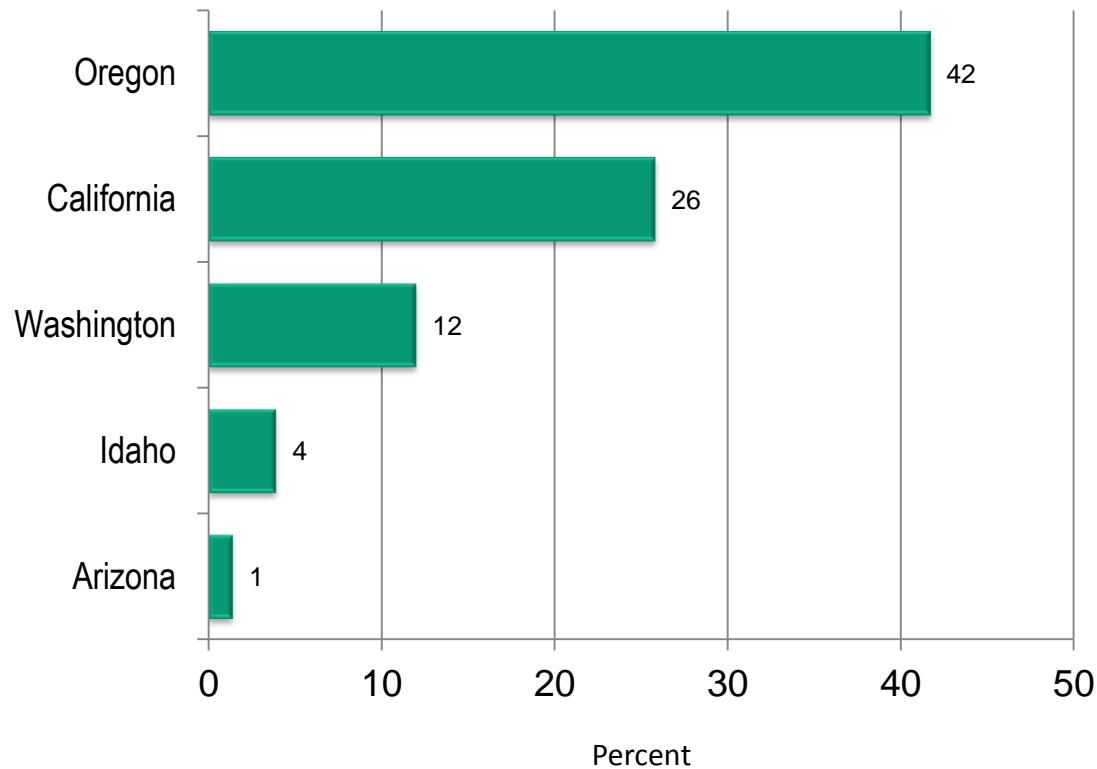
Base: Overnight Marketable Trips



State Origin Of Overnight Trip



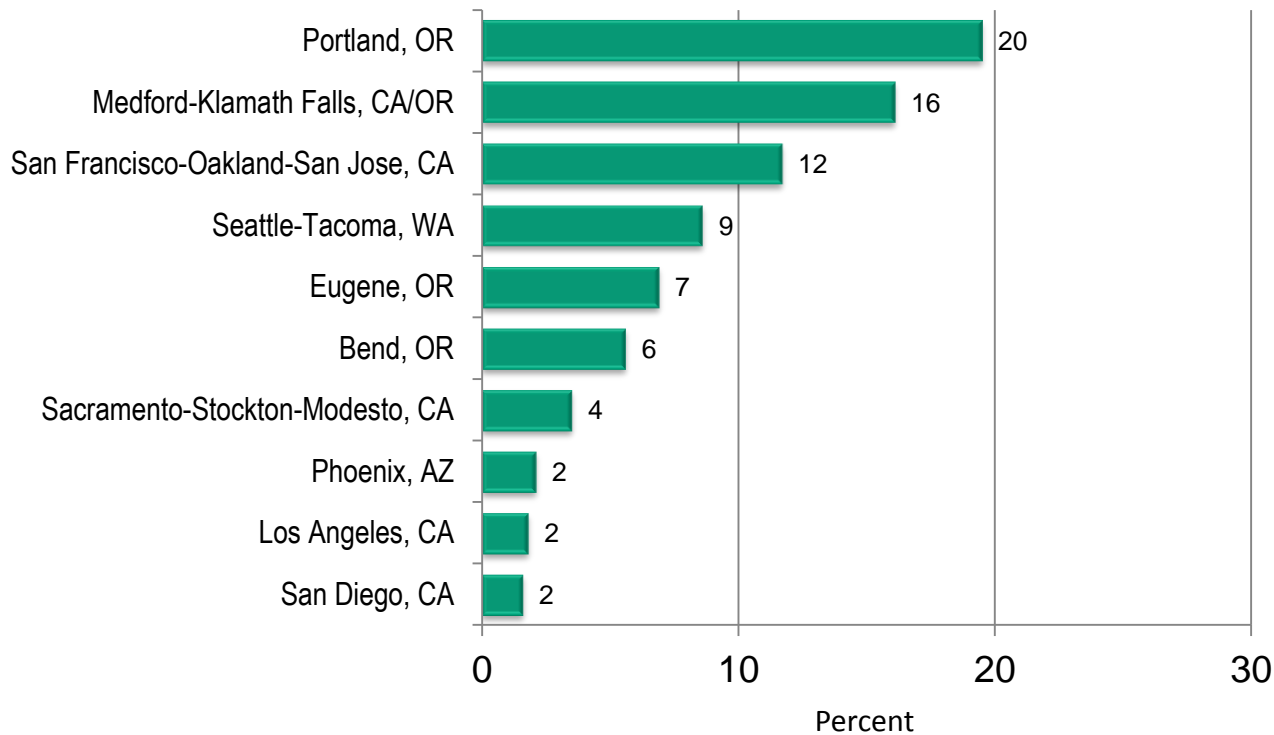
Base: Overnight Marketable Trips



DMA Origin Of Overnight Trip



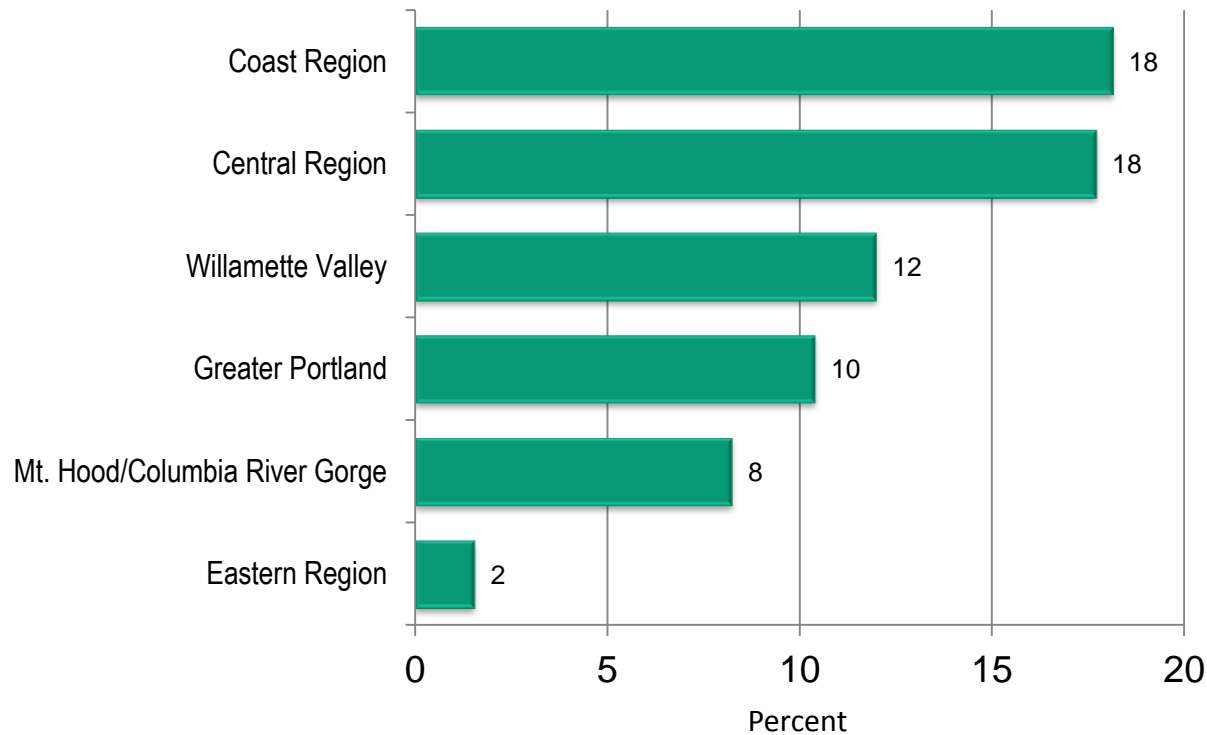
Base: Overnight Marketable Trips



Other Oregon Regions Visited on Southern Region Trip



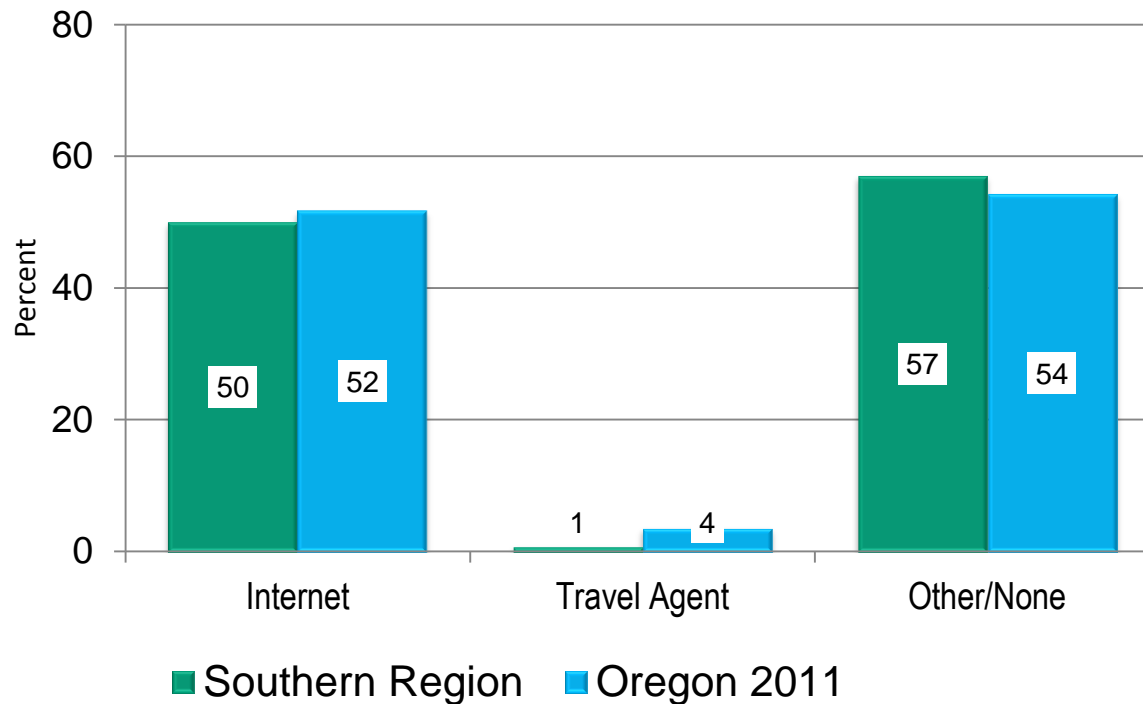
Base: Overnight Marketable Trips



Method of Planning Trip



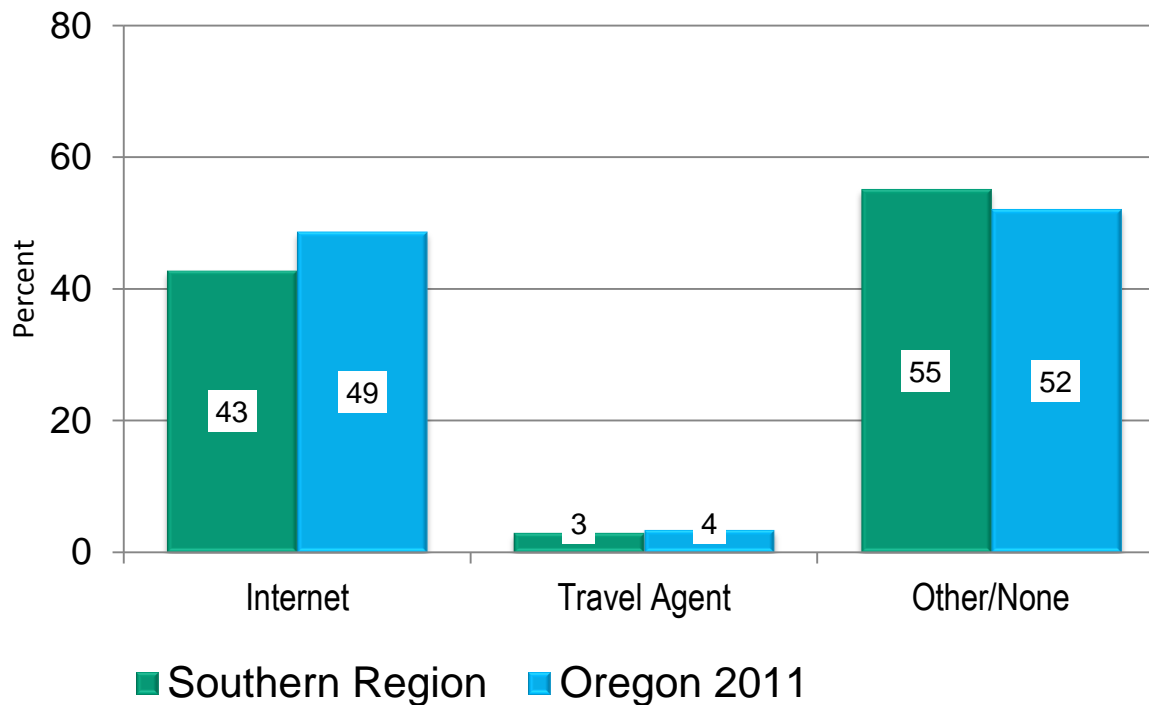
Base: Overnight Marketable Trips



Method of Booking Trip



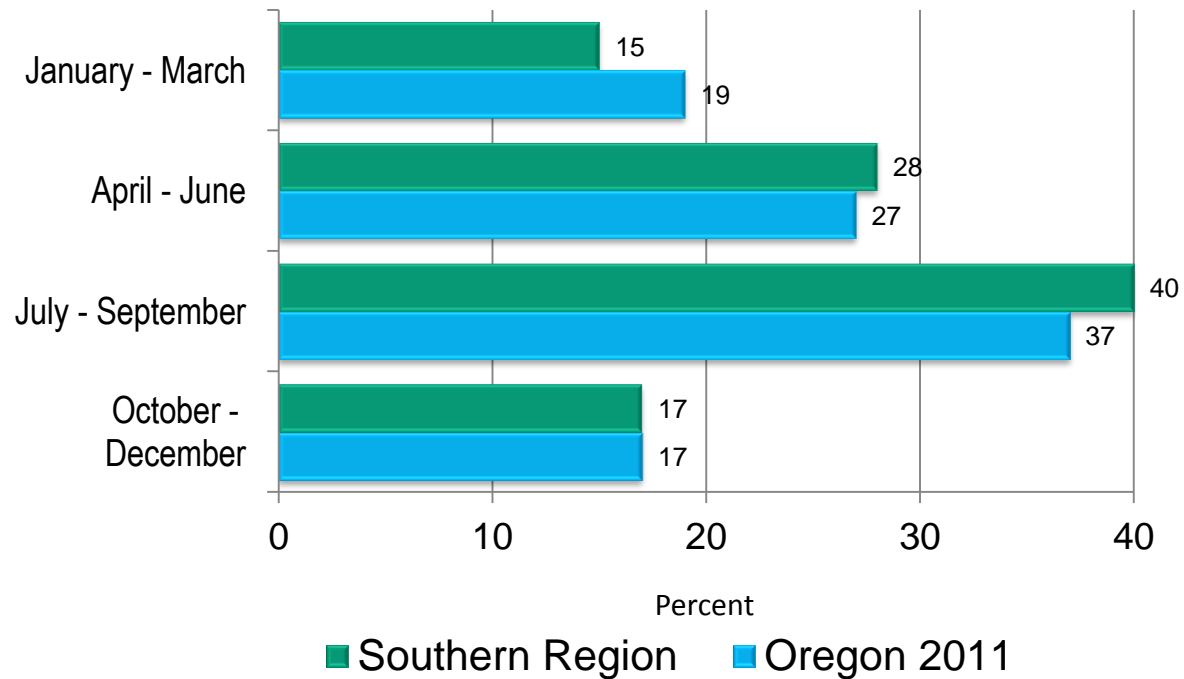
Base: Overnight Marketable Trips



Season of Trip



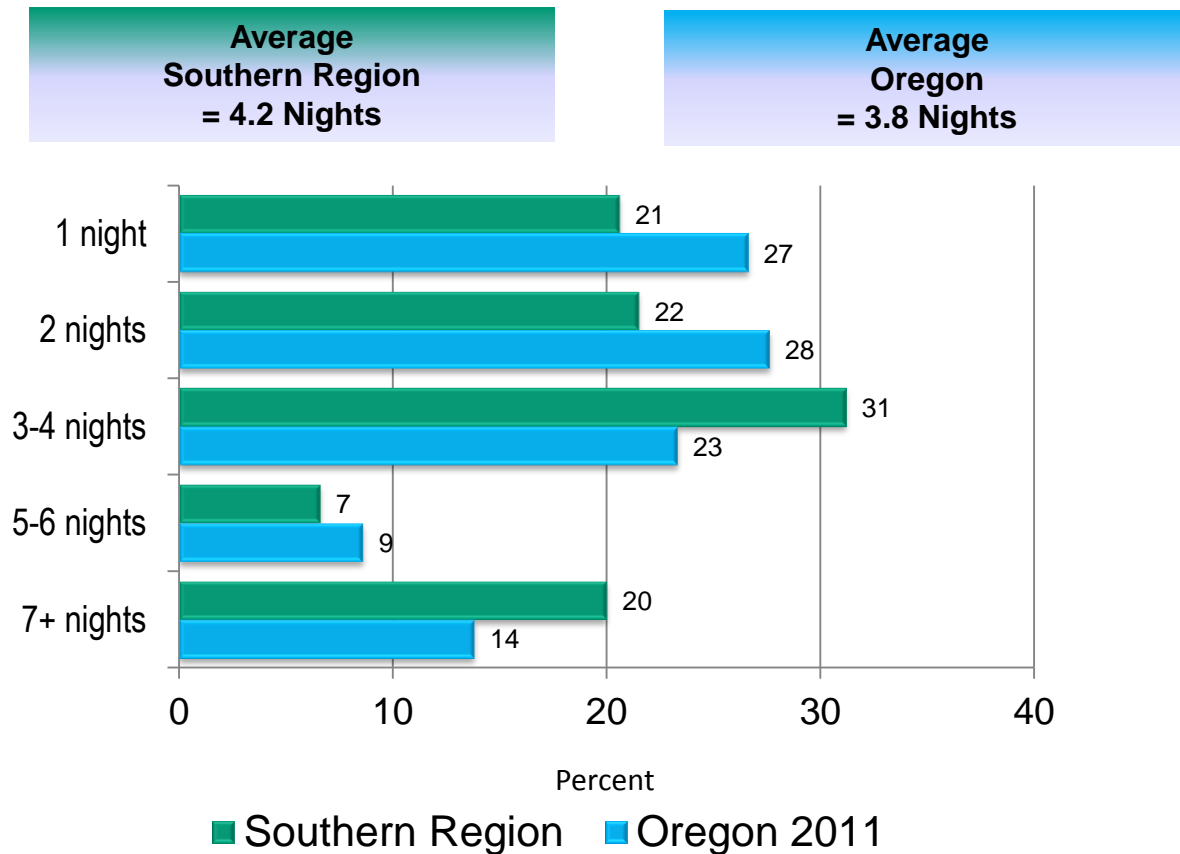
Base: Overnight Marketable Trips



Total Nights Away on Trip



Base: Overnight Marketable Trips

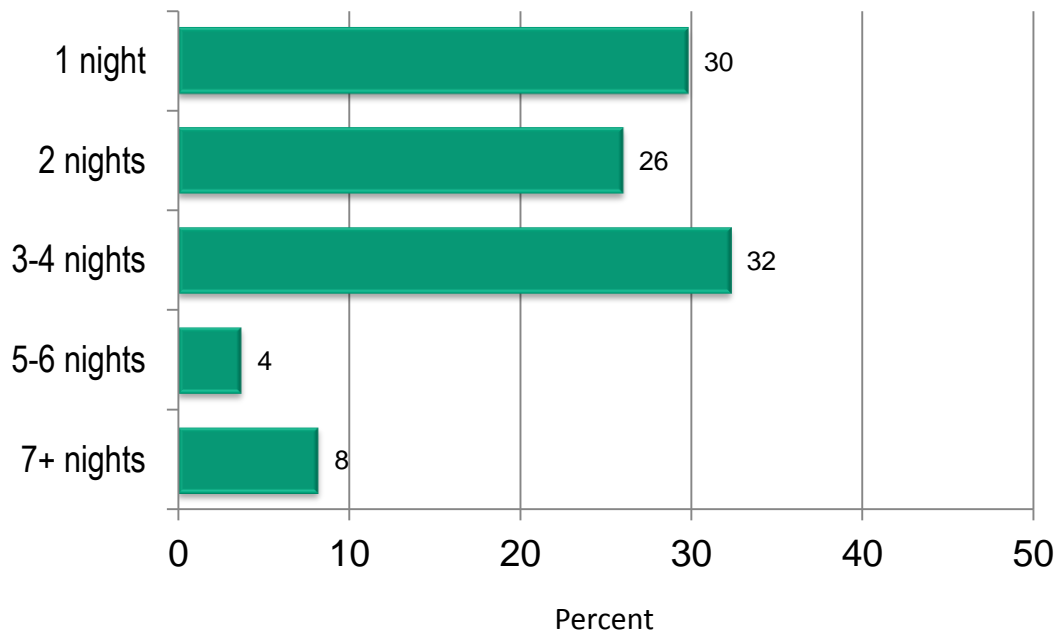


Number of Nights Spent in Southern Region



Base: Overnight Marketable Trips with 1+ Nights Spent In Southern Region

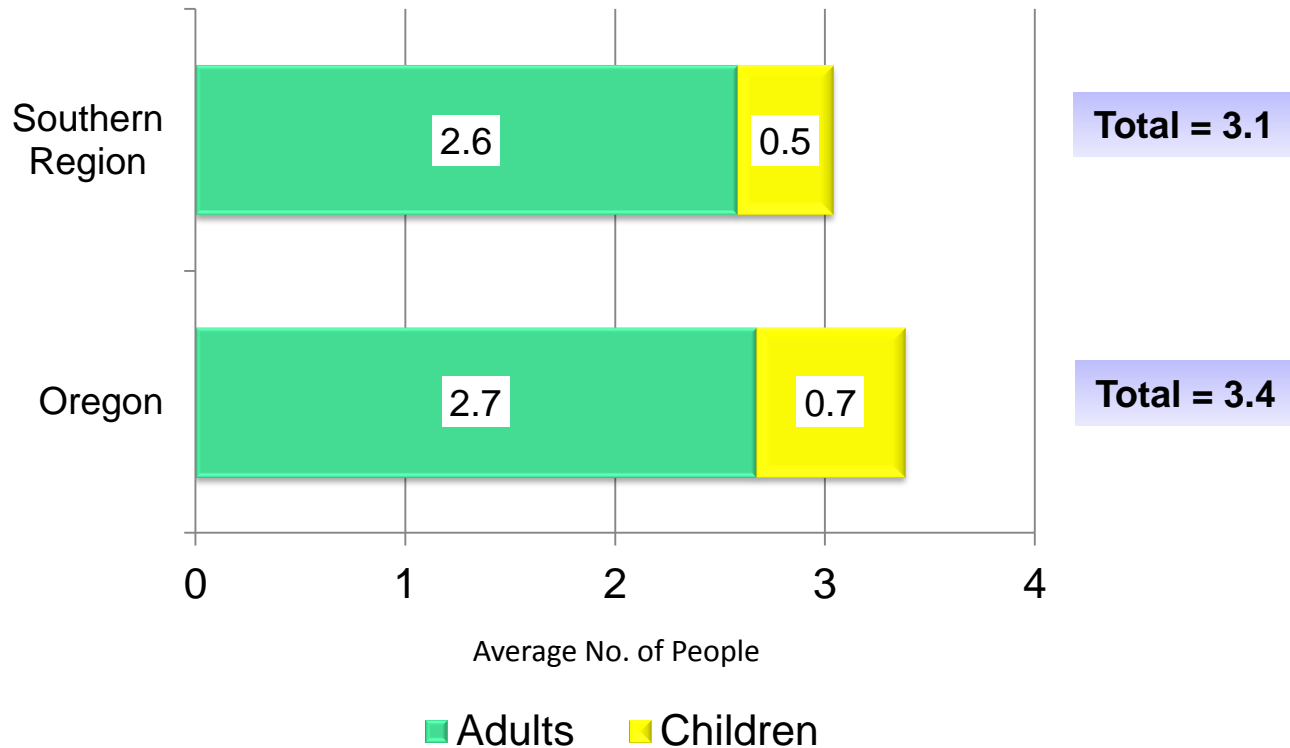
Average Nights Spent in Southern Region = 2.9



Size of Travel Party



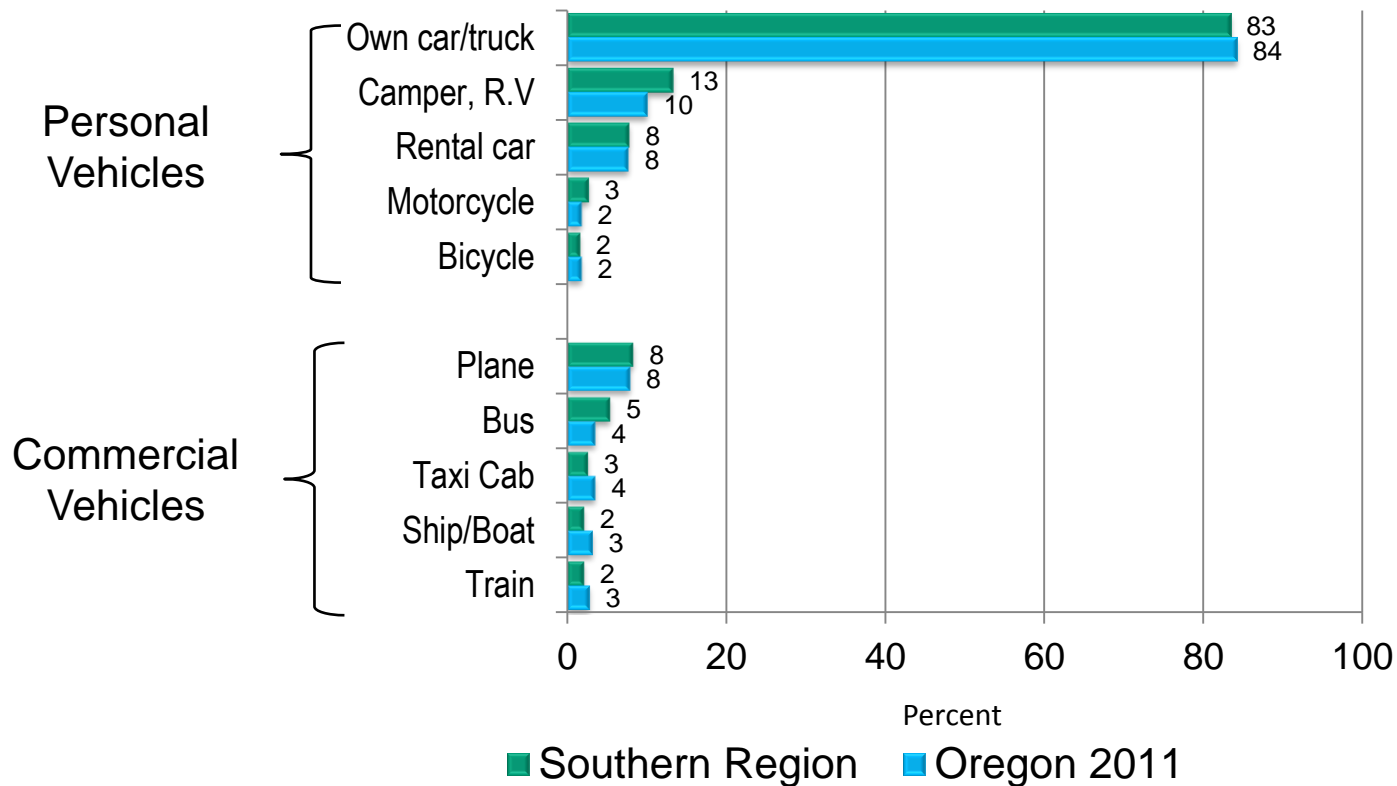
Base: Overnight Marketable Trips



Transportation



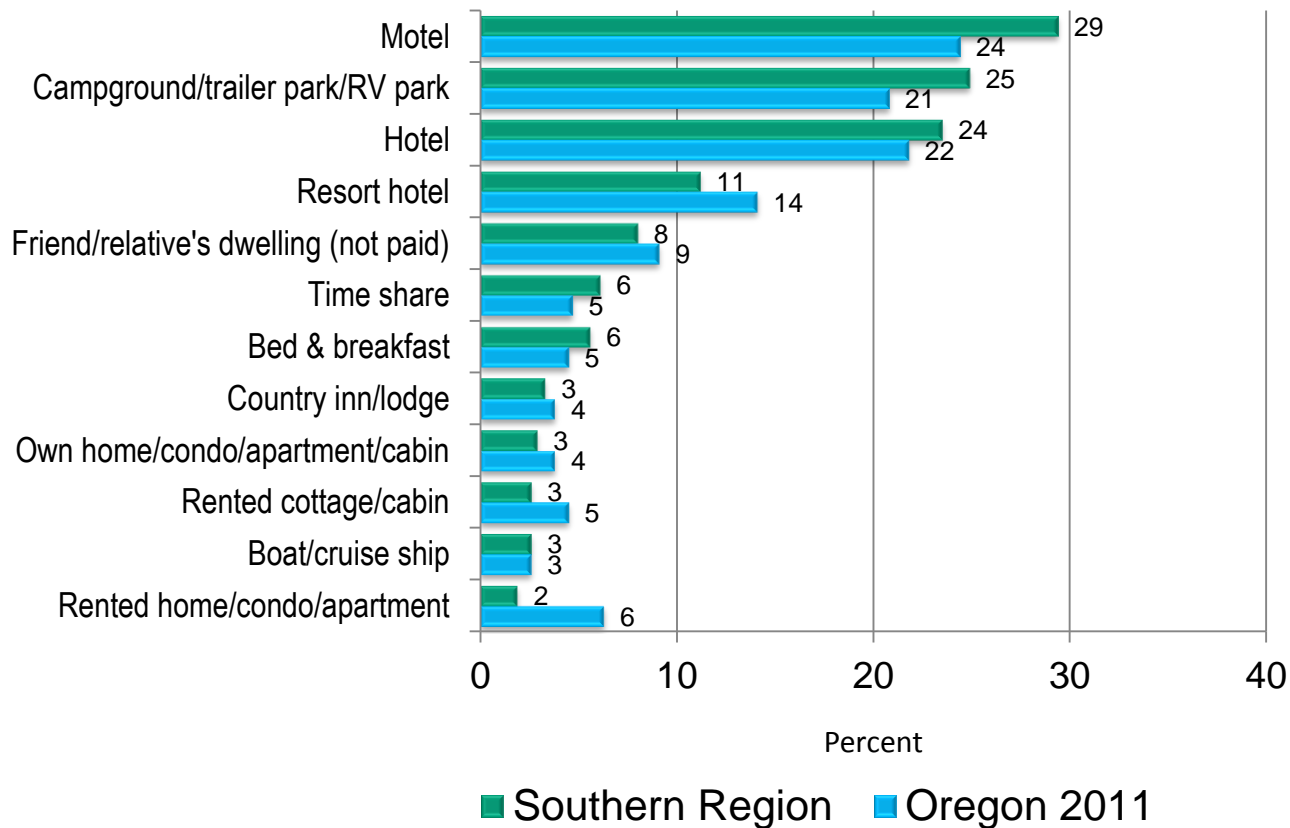
Base: Overnight Marketable Trips



Accommodation



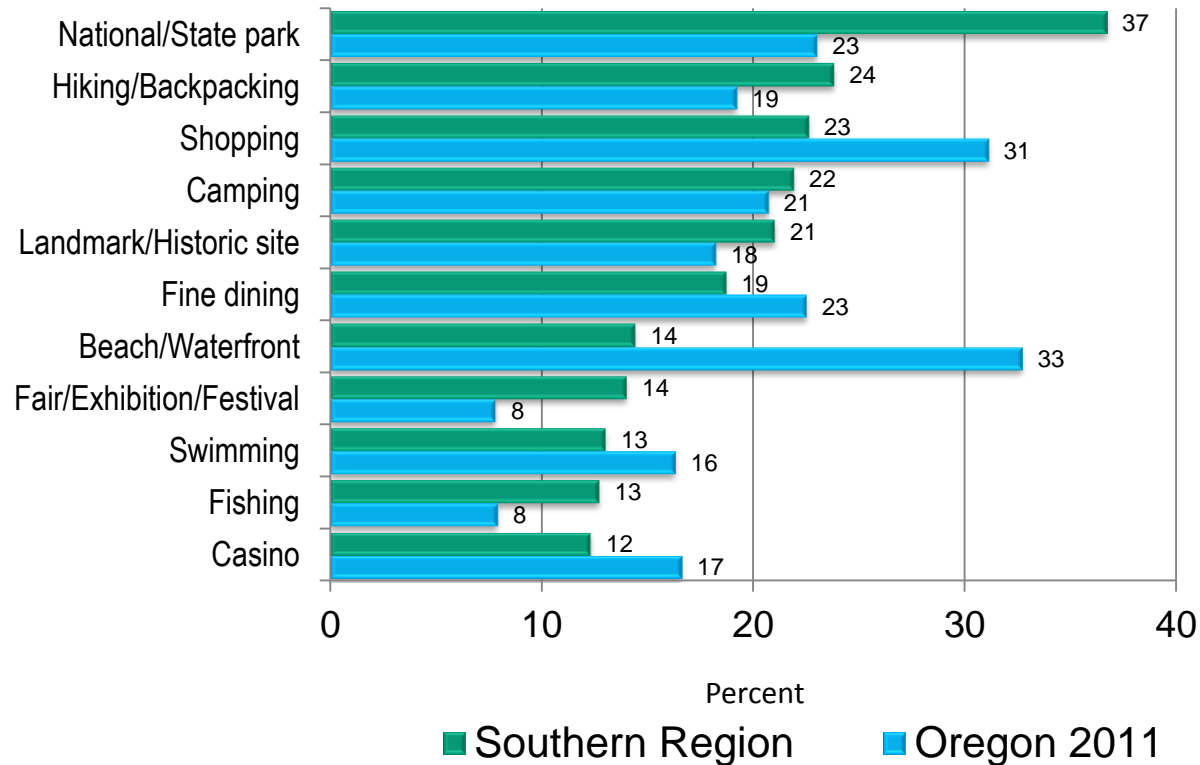
Base: Overnight Marketable Trips



Activities and Experiences



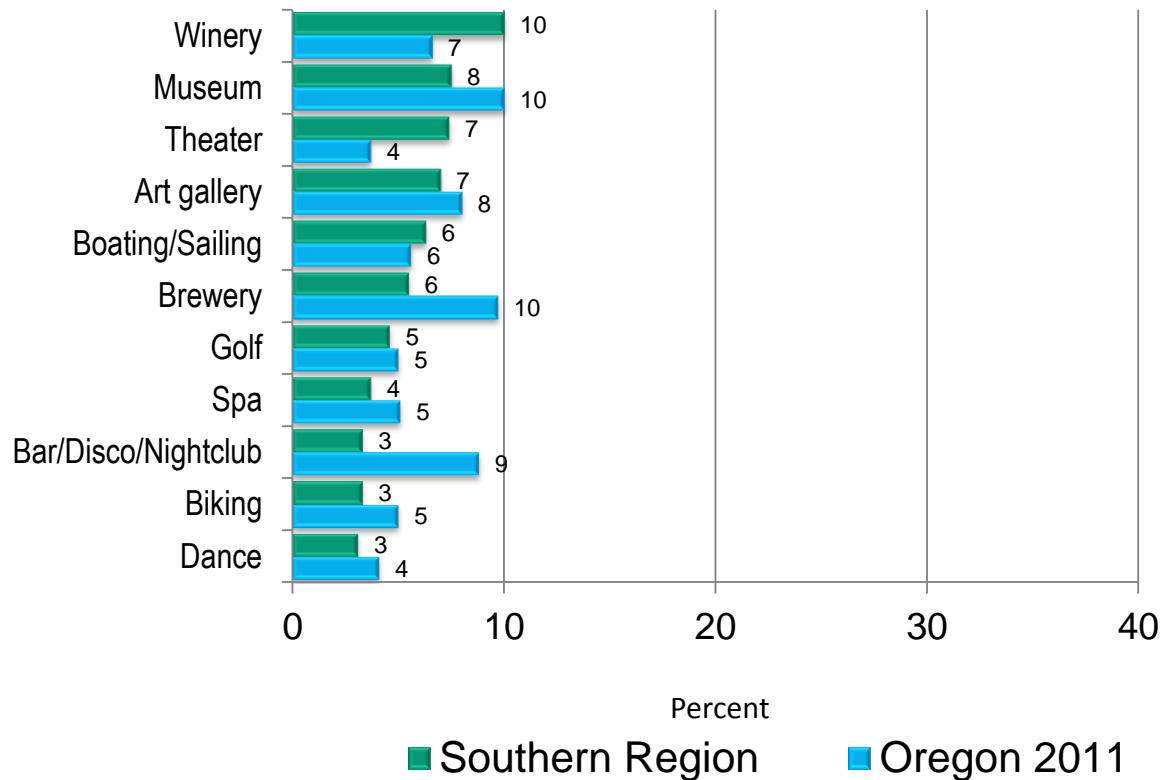
Base: Overnight Marketable Trips



Activities and Experiences (Cont'd)



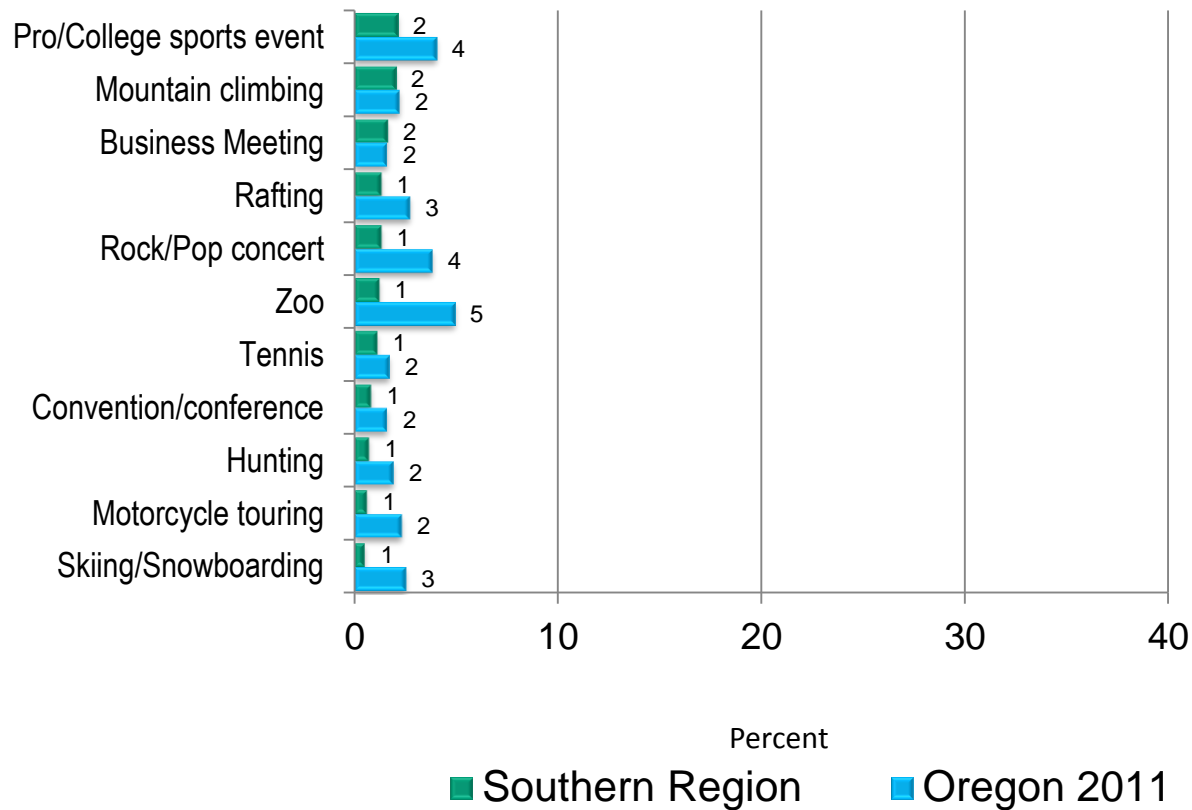
Base: Overnight Marketable Trips



Activities and Experiences (Cont'd)



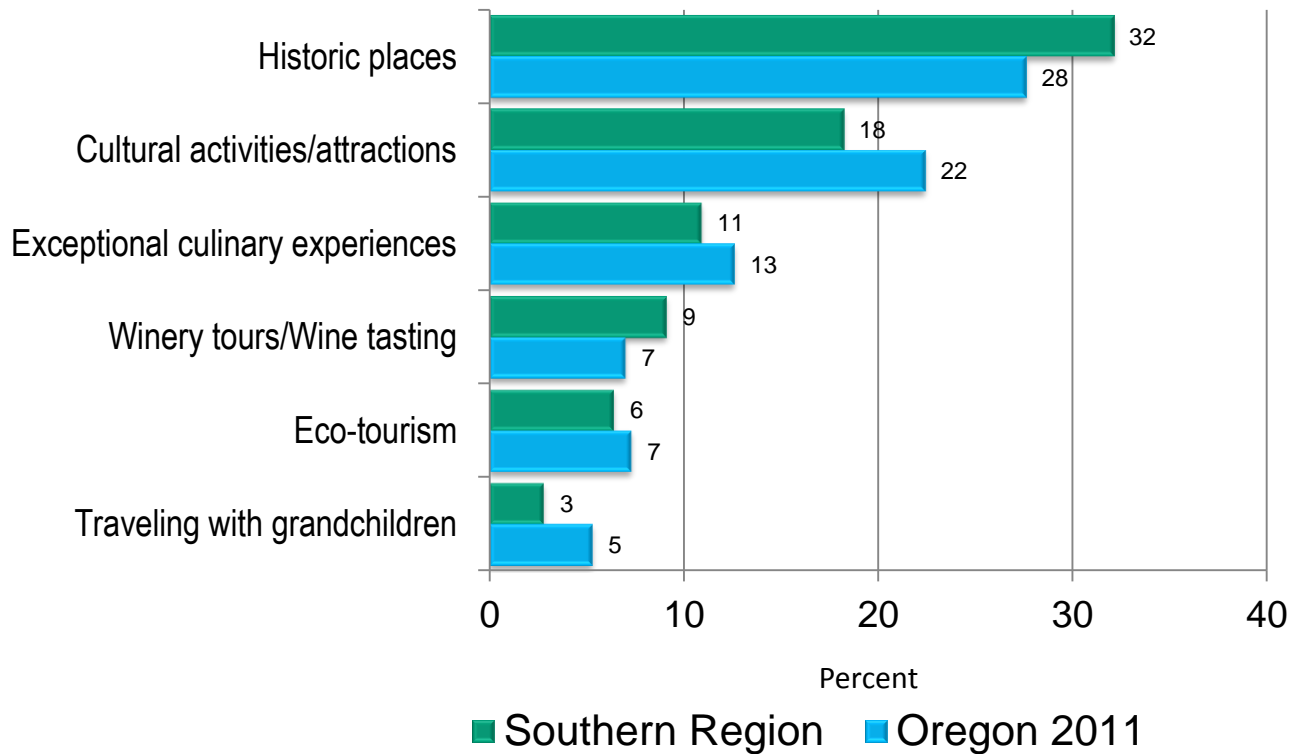
Base: Overnight Marketable Trips



Activities of Special Interest



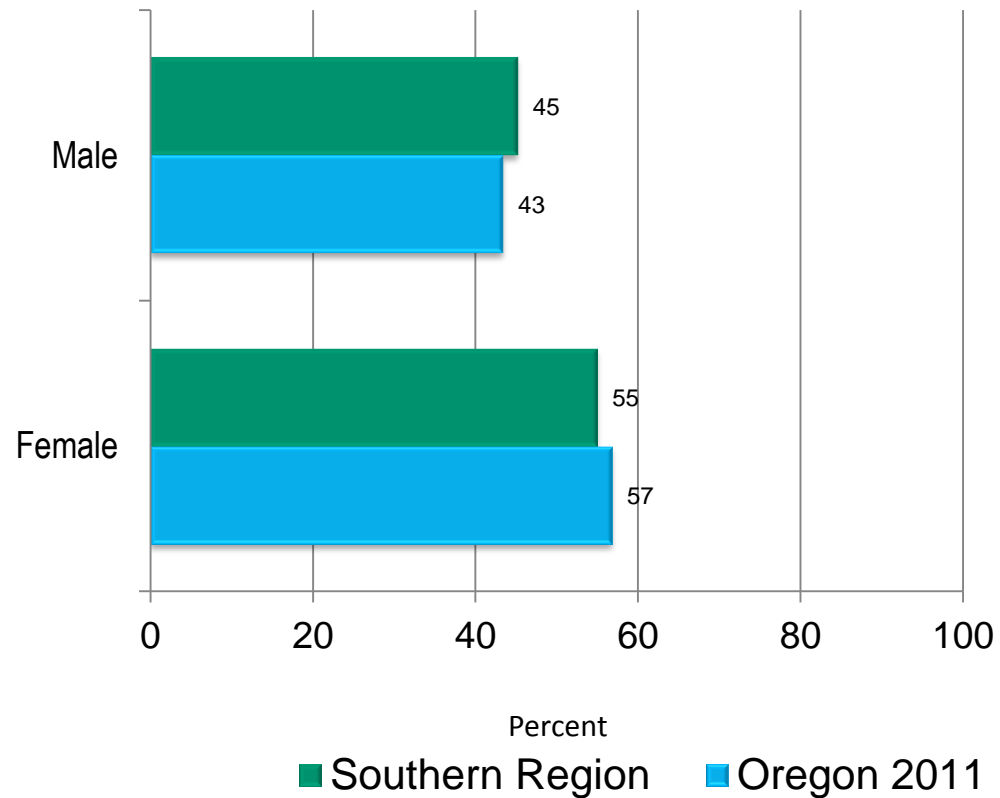
Base: Overnight Marketable Trips



Gender



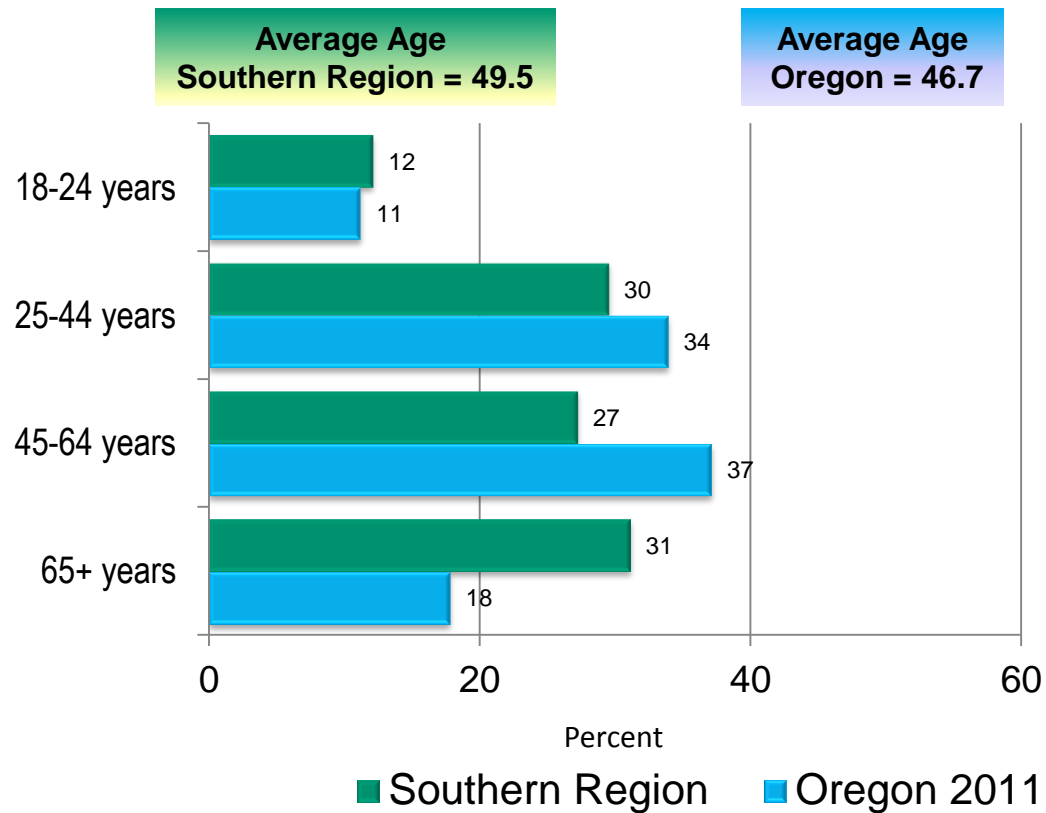
Base: Overnight Marketable Trips



Age



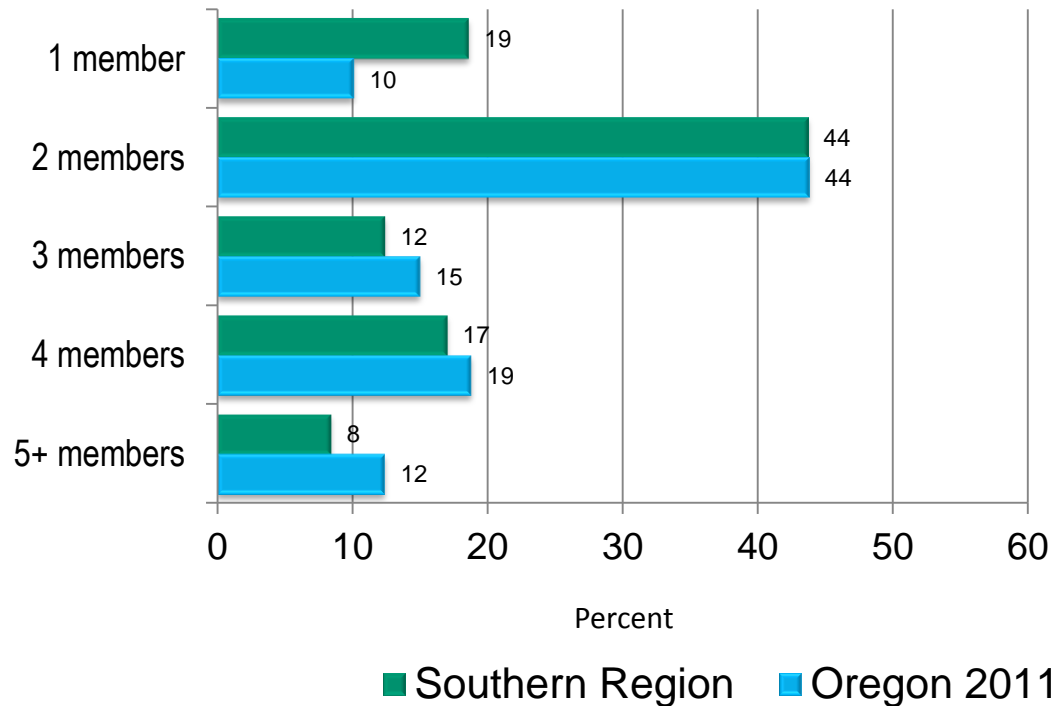
Base: Overnight Marketable Trips



Household Size



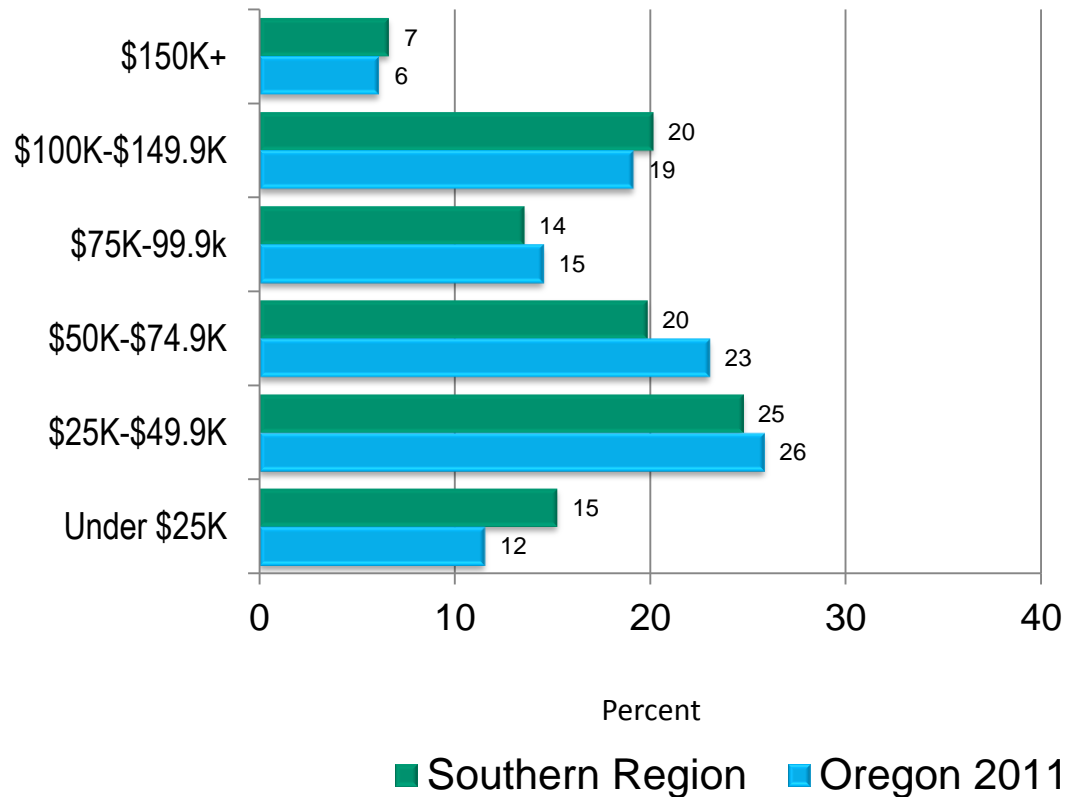
Base: Overnight Marketable Trips



Income



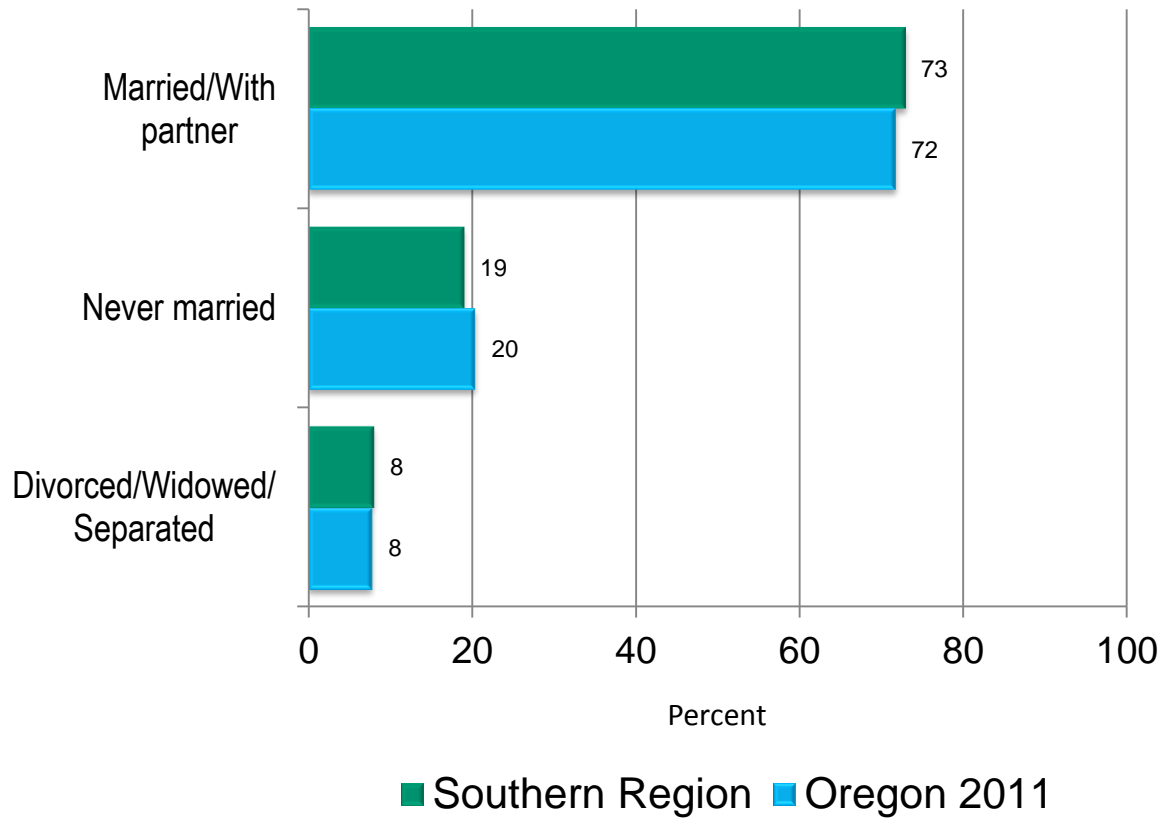
Base: Overnight Marketable Trips



Marital Status



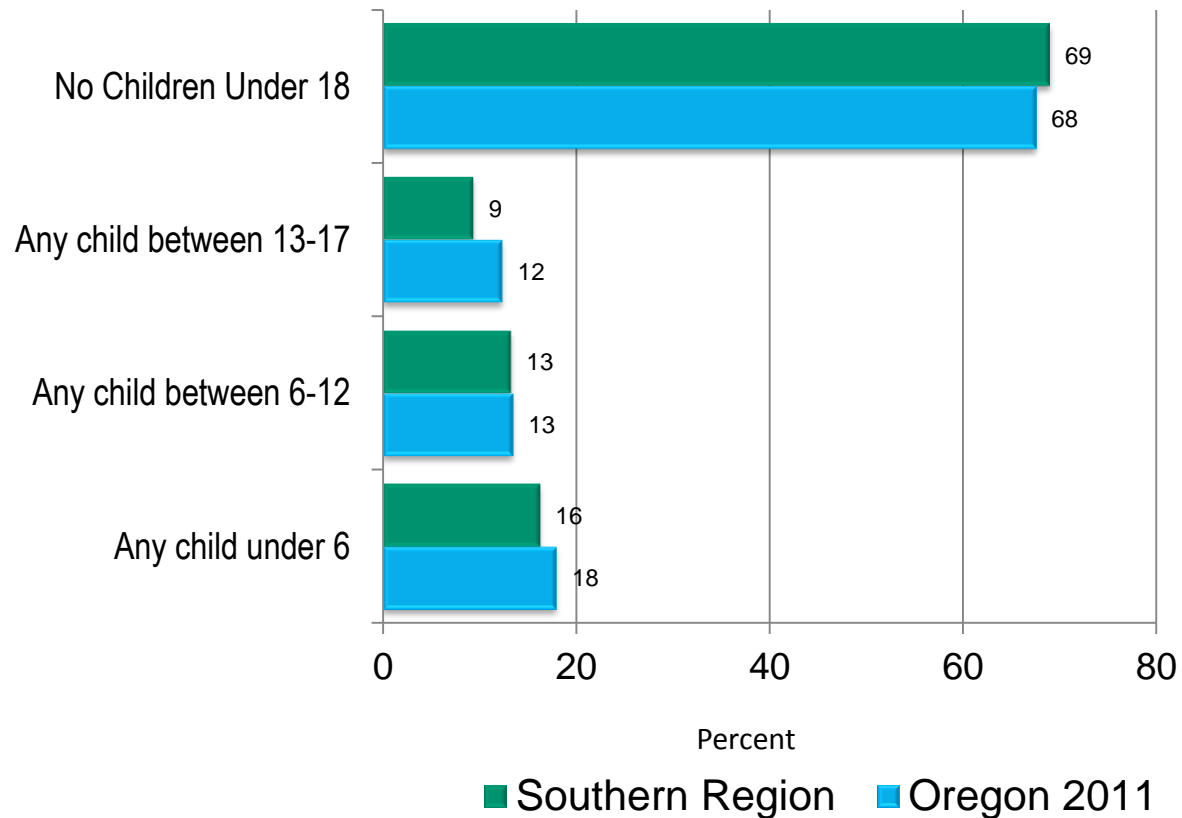
Base: Overnight Marketable Trips



Children in Household



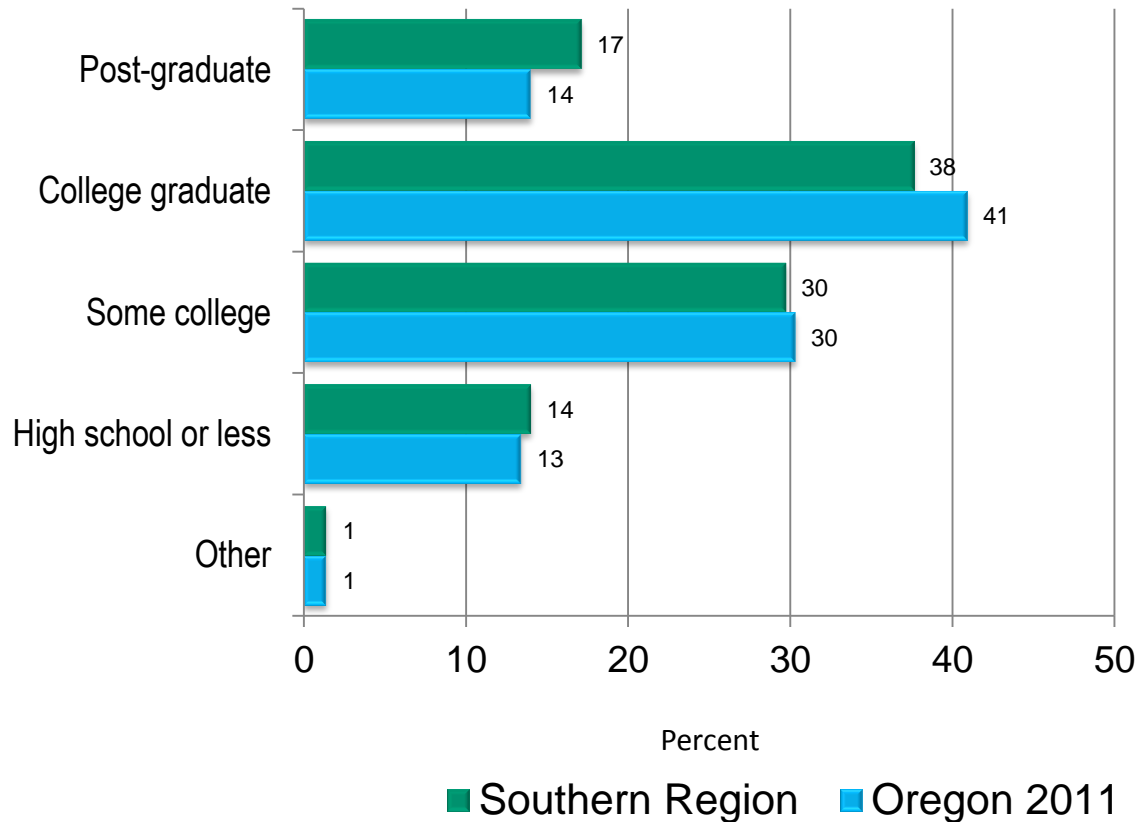
Base: Overnight Marketable Trips



Education



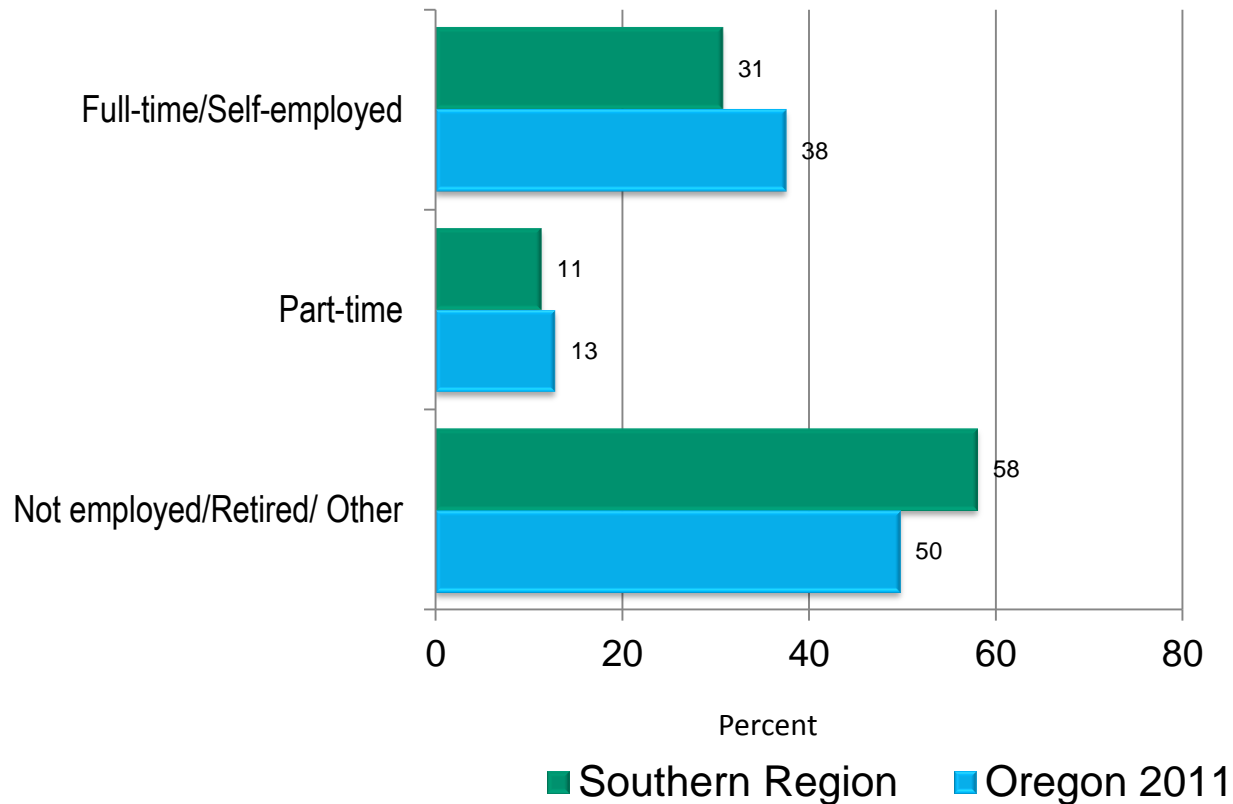
Base: Overnight Marketable Trips



Employment



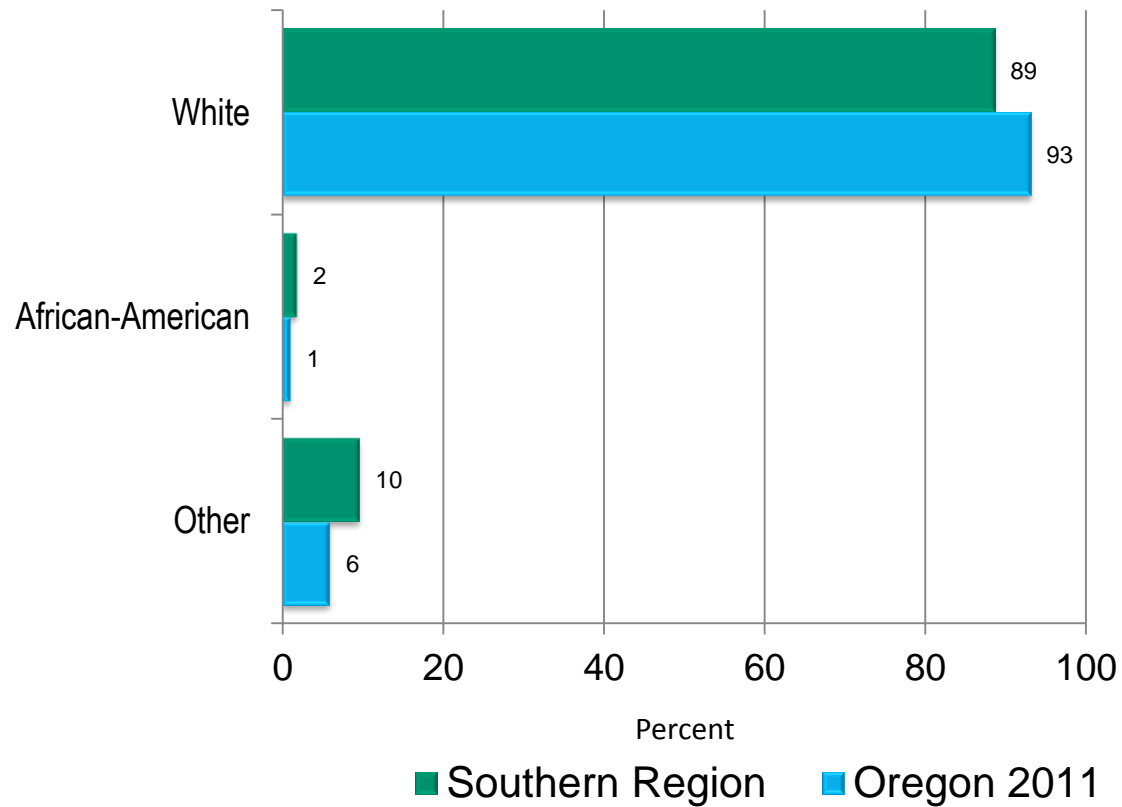
Base: Overnight Marketable Trips



Race



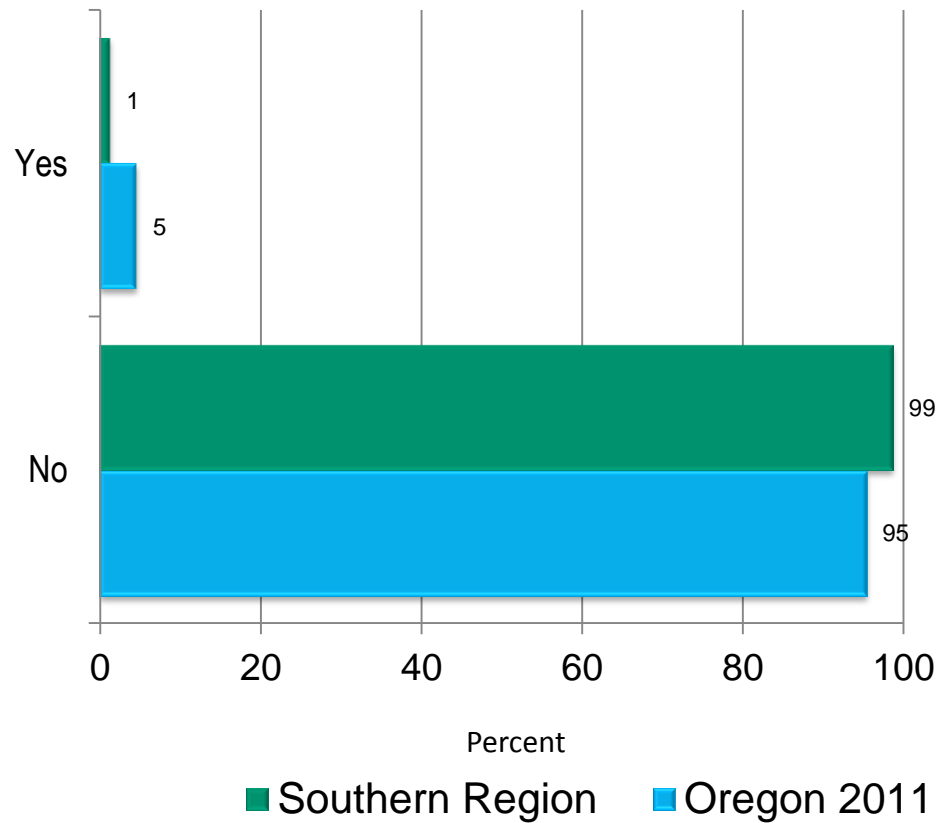
Base: Overnight Marketable Trips



Hispanic Background



Base: Overnight Marketable Trips



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