



Oregon 2013 Regional Visitor Report The Eastern Region

Introduction



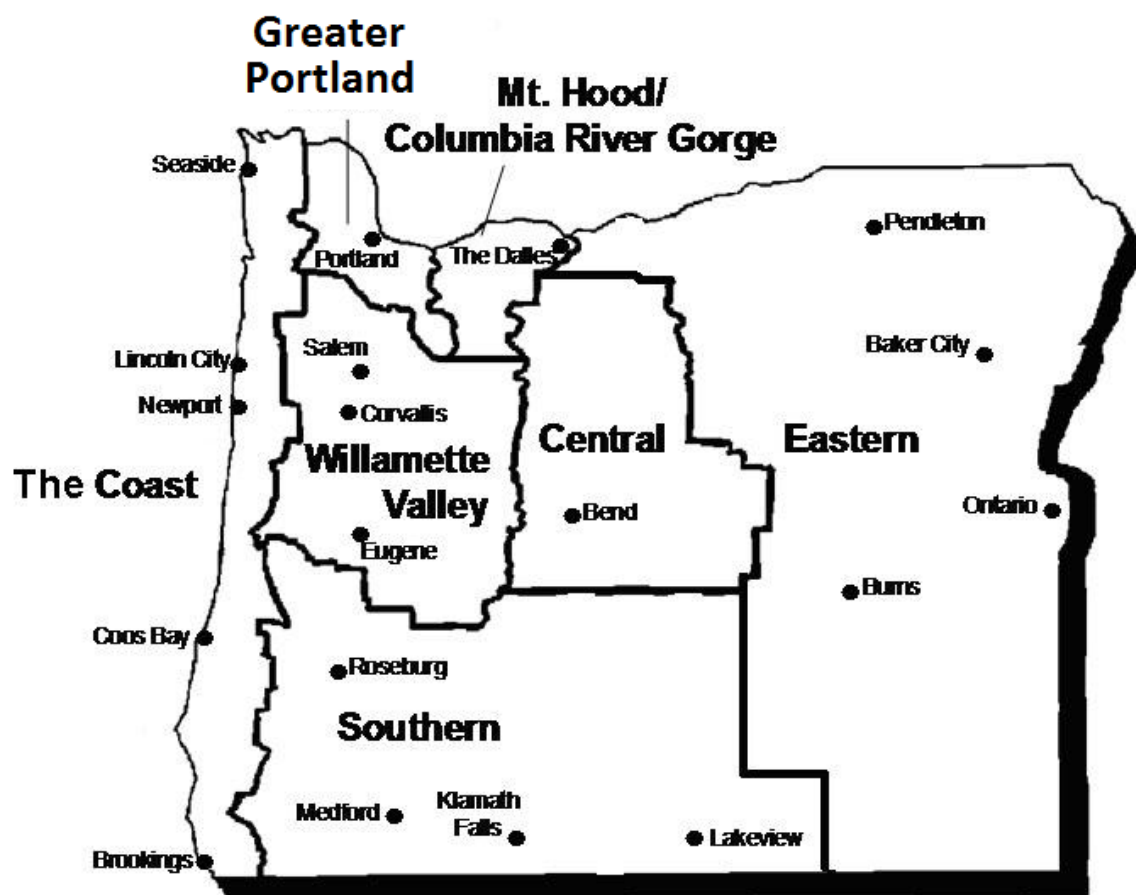
- ◉ Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- ◉ It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- ◉ This report provides:
 - ◉ *Estimates of 2013 overnight visitor volume and travel expenditures for Oregon as well as for the Eastern Region in particular*
 - ◉ *Strategic intelligence about the Eastern Region's overnight travel market including:*
 - ◉ *Key sources of business*
 - ◉ *Visitor profiling*
 - ◉ *Trip characteristics*

Methodology



- ◉ For each of the 2012 and 2013 travel years, a representative sample of visitors to the Eastern 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 5,752 overnight trips taken to Oregon in 2012 and 2013:
 - ◉ 351 included a visit to the Eastern Region
 - ◉ Of those, 164 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 Eastern Region are reported for the 2013 travel year, as are all Oregon state norms.
 - ◉ To maximize statistical reliability, other Eastern Region data (trip characteristics and visitor profiles) are based on two years' combined sample from 2012 and 2013.

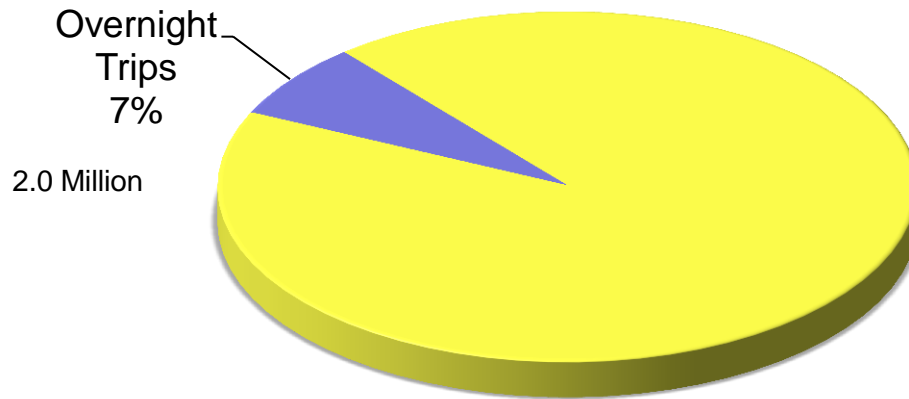
Travel Market Size & Structure

- 2013

Size of the Eastern Region's Overnight Travel Market



Total Overnight Trips to Oregon* = 30.6 Million

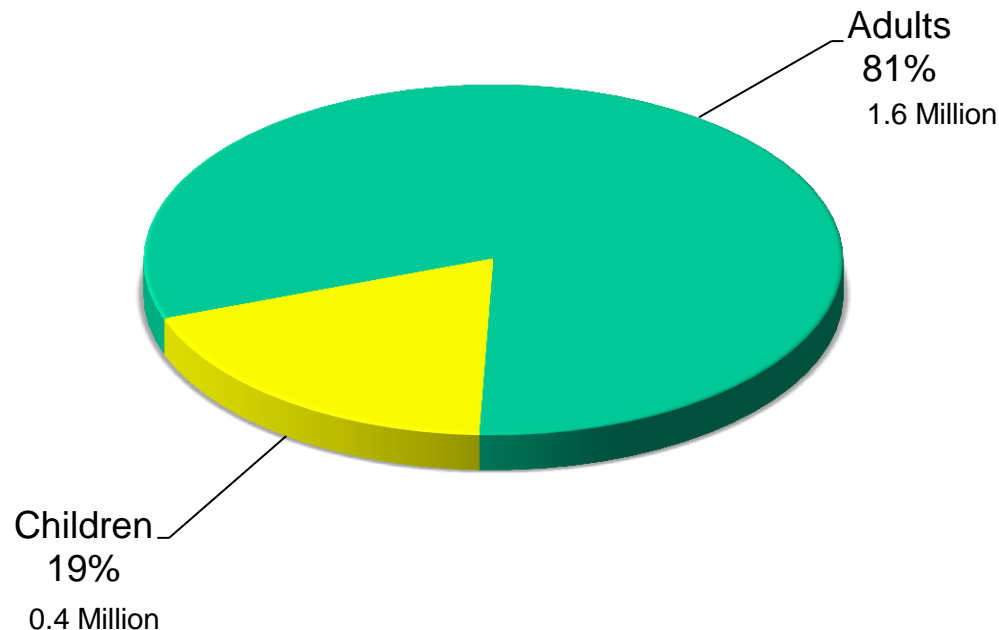


*Includes both adults and children

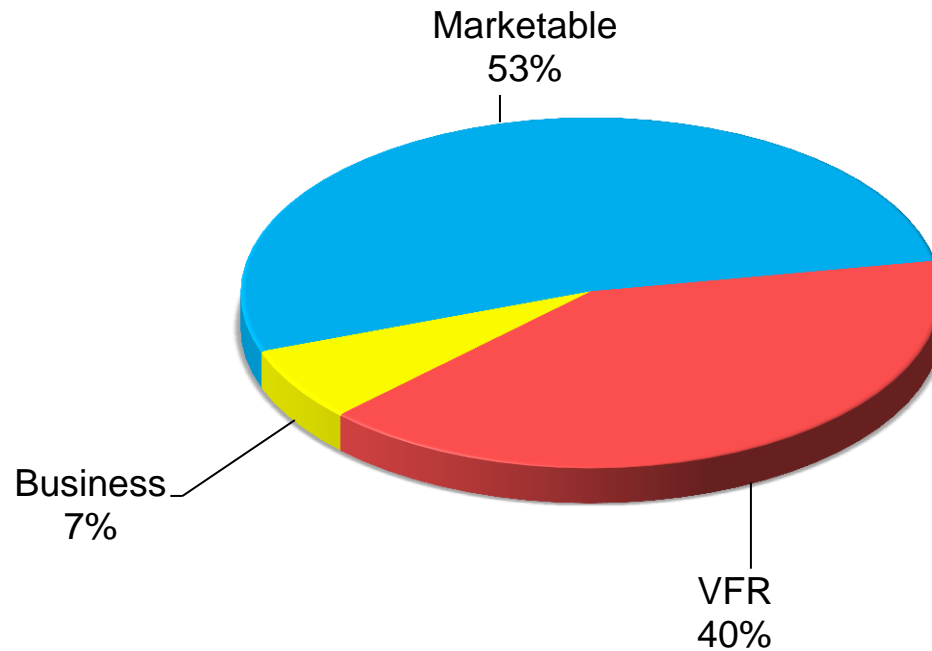
The Eastern Region's Overnight Travel Market — Adults vs. Children



Total Overnight Trips to the Eastern Region = 2 Million



The Eastern Region's Overnight Travel Market by Trip Purpose

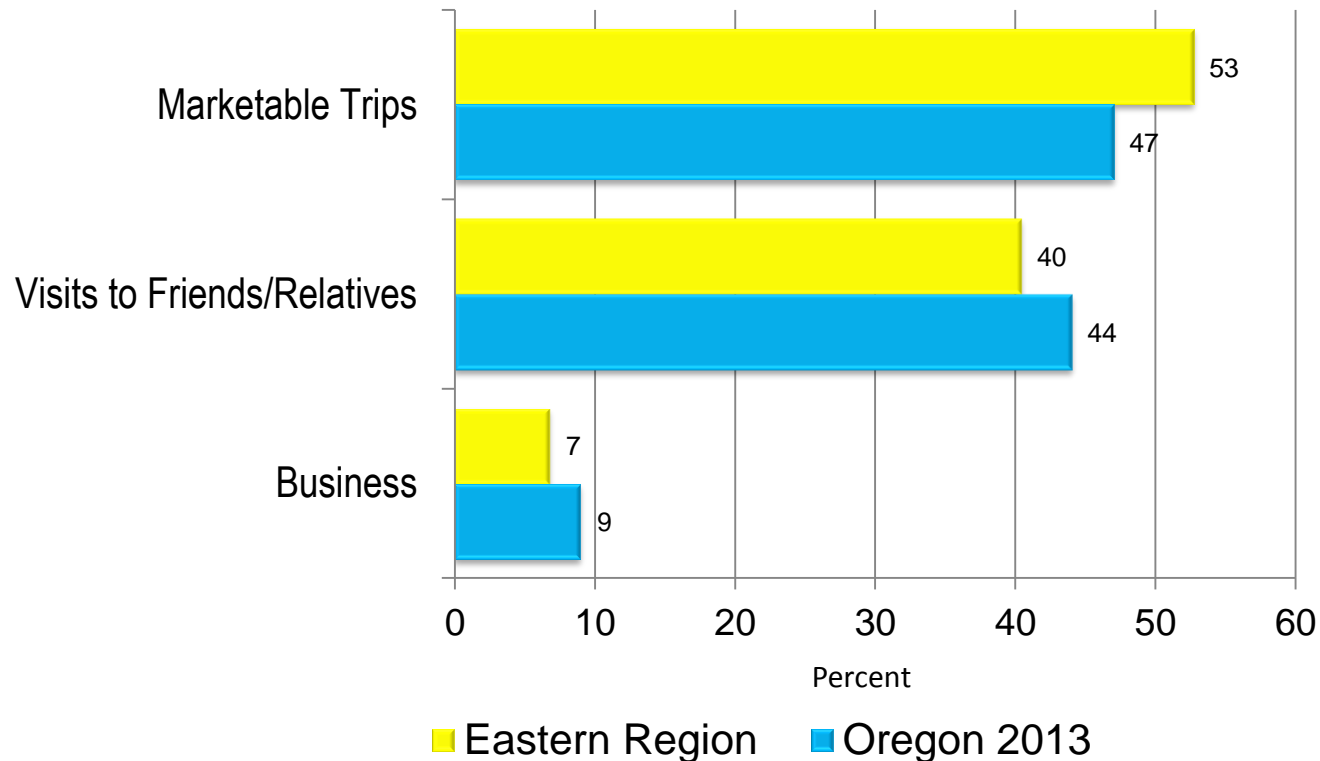


*Marketable includes Business-Leisure

Purpose of Trip — The Eastern Region vs. Oregon State



Base: 2011 Overnight Trips

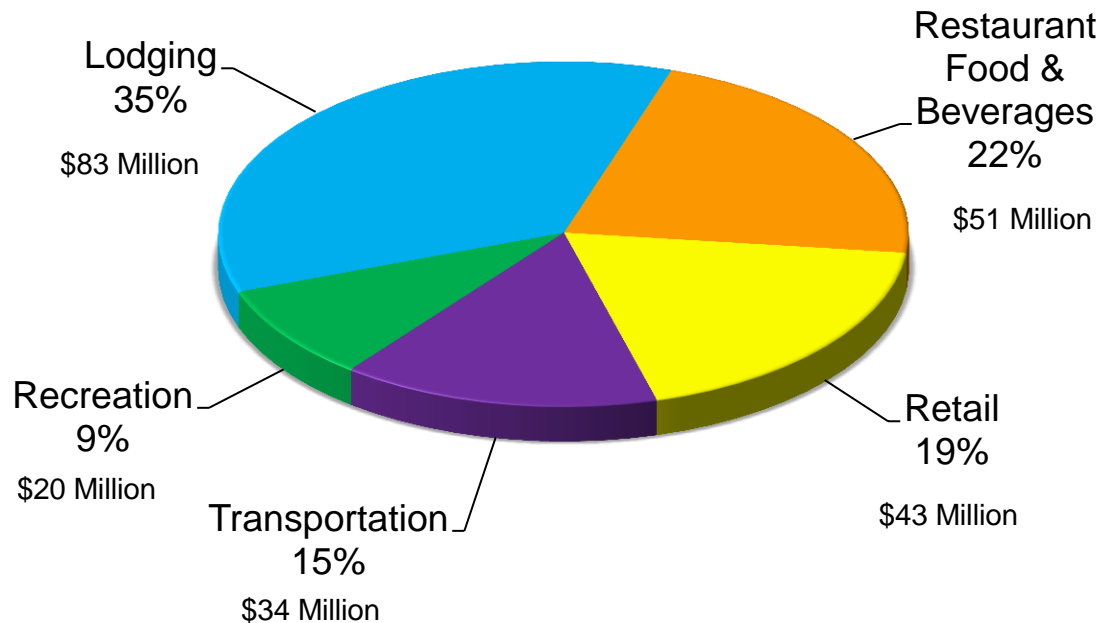


*Marketable includes Business-Leisure

2013 Overnight Spending — by Sector



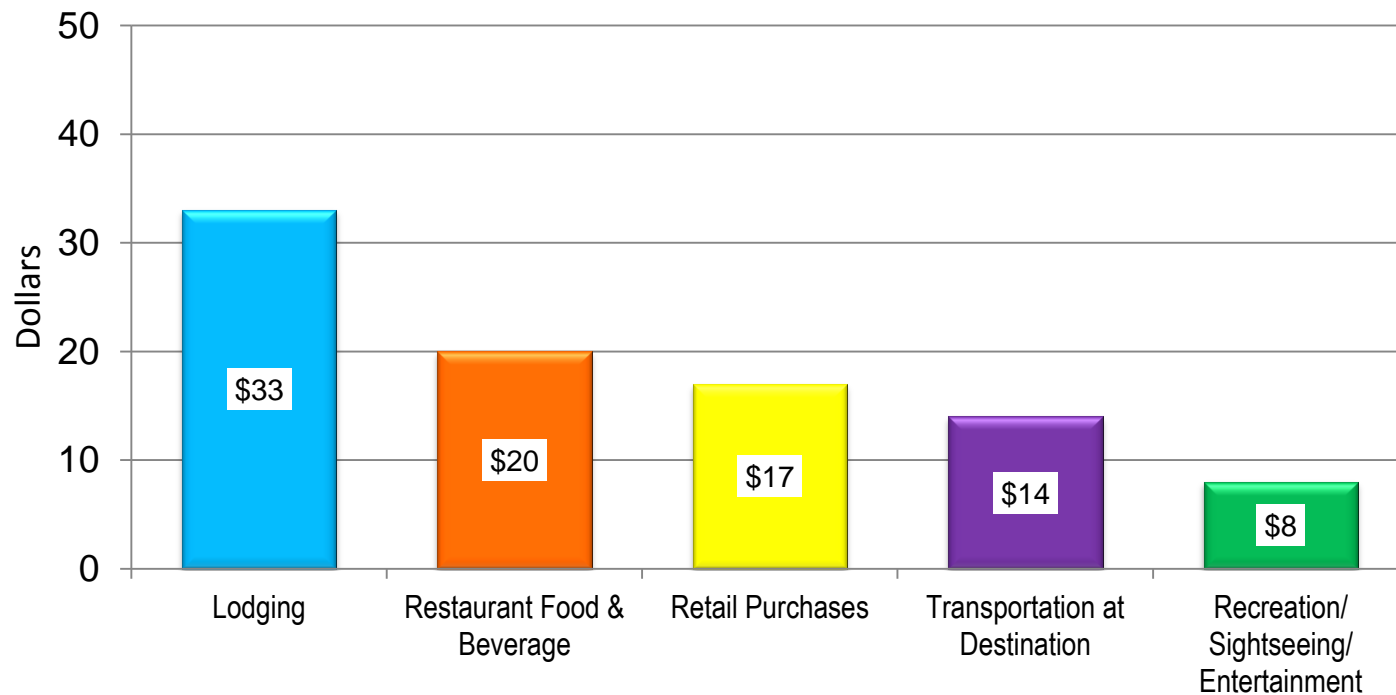
2013 Eastern Region Spending = \$231 Million



Average Per Person Expenditures on Overnight Trips — By Sector



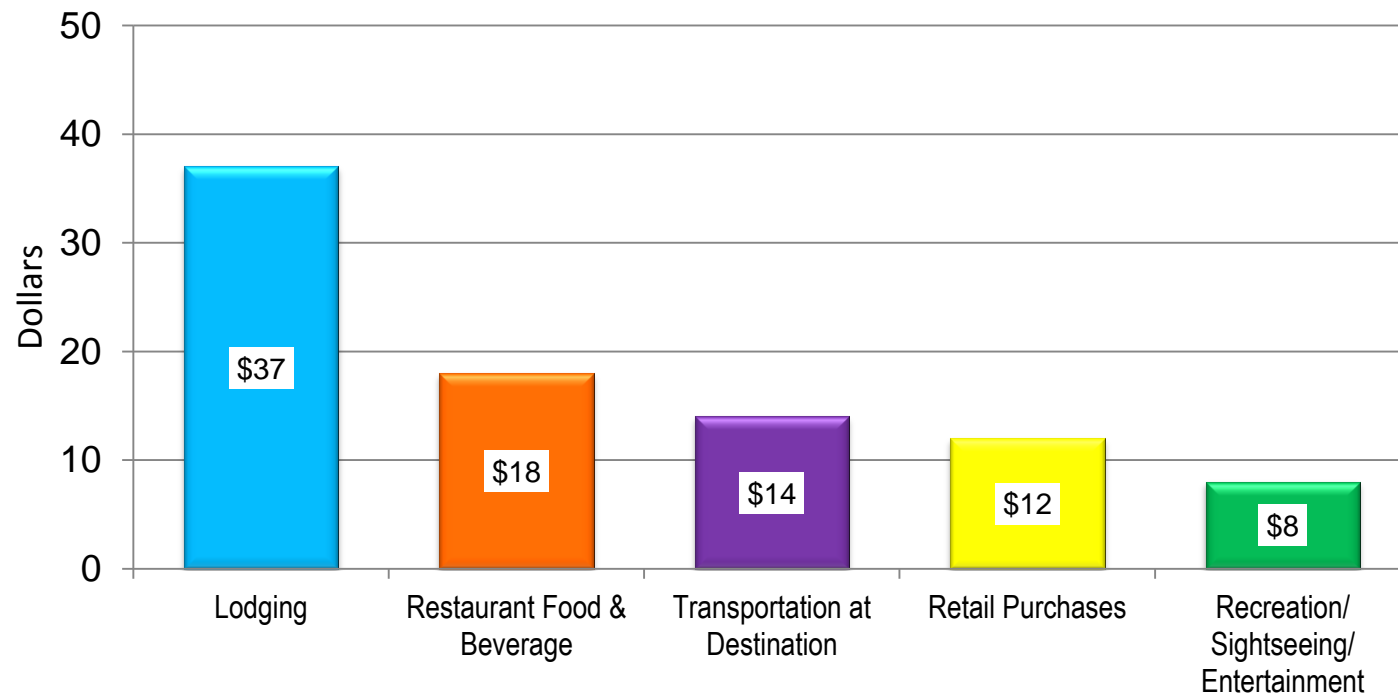
Base: Total Overnight Person-Trips



Average Per Person Expenditures on Overnight Marketable Trips — By Sector



Base: 2011 Overnight Marketable Trips



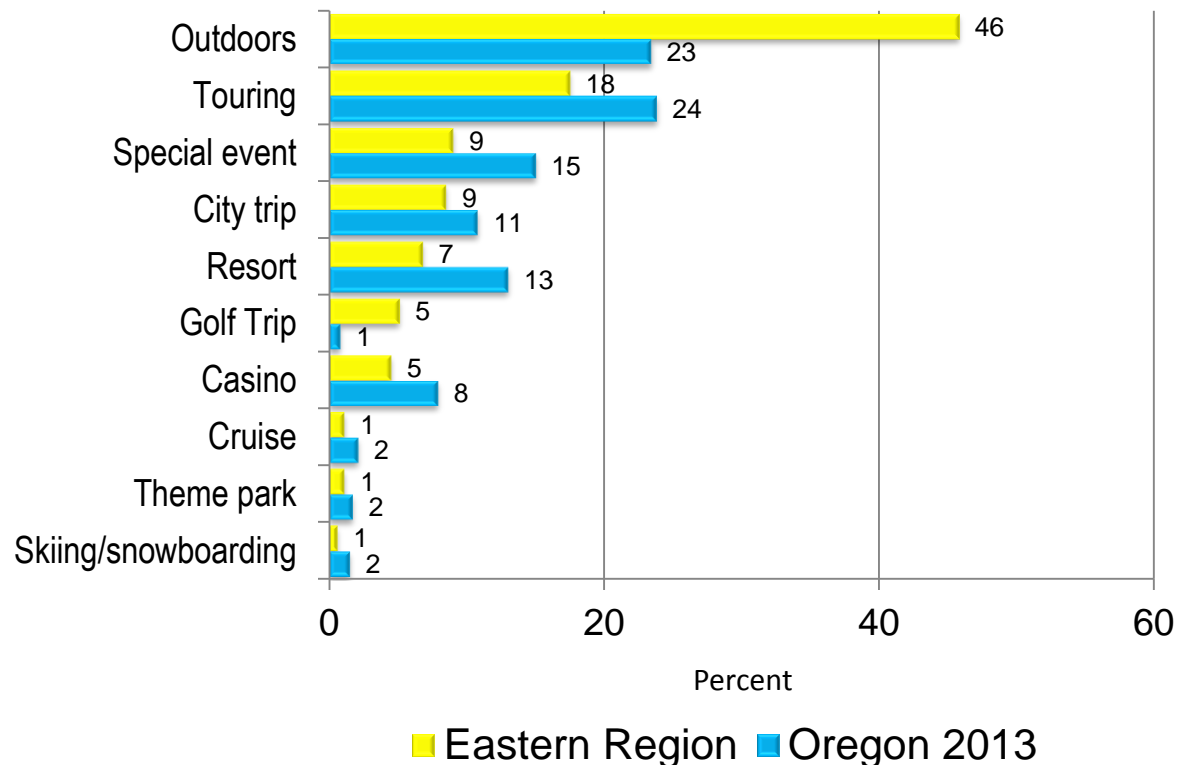


Marketable Trip Characteristics and Visitor Profile – 2012/2013

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



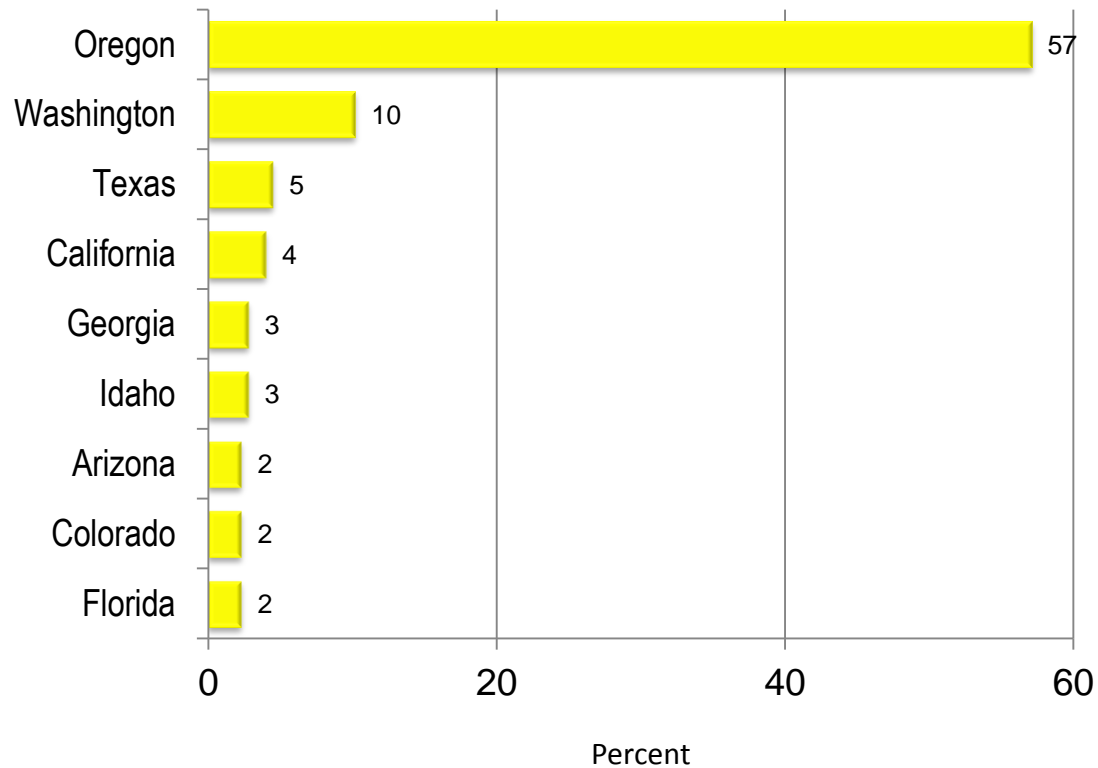
Base: Overnight Marketable Trips



State Origin Of Overnight Trip



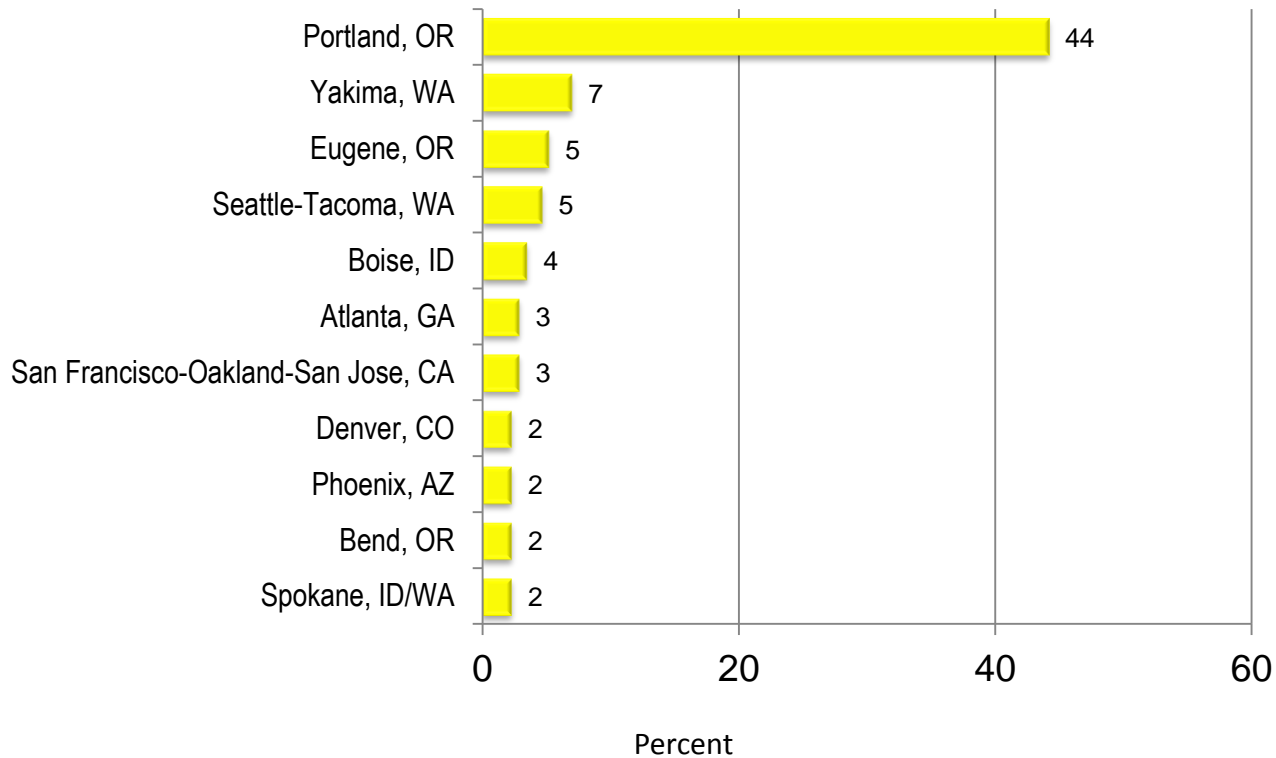
Base: Overnight Marketable Trips



DMA Origin Of Overnight Trip



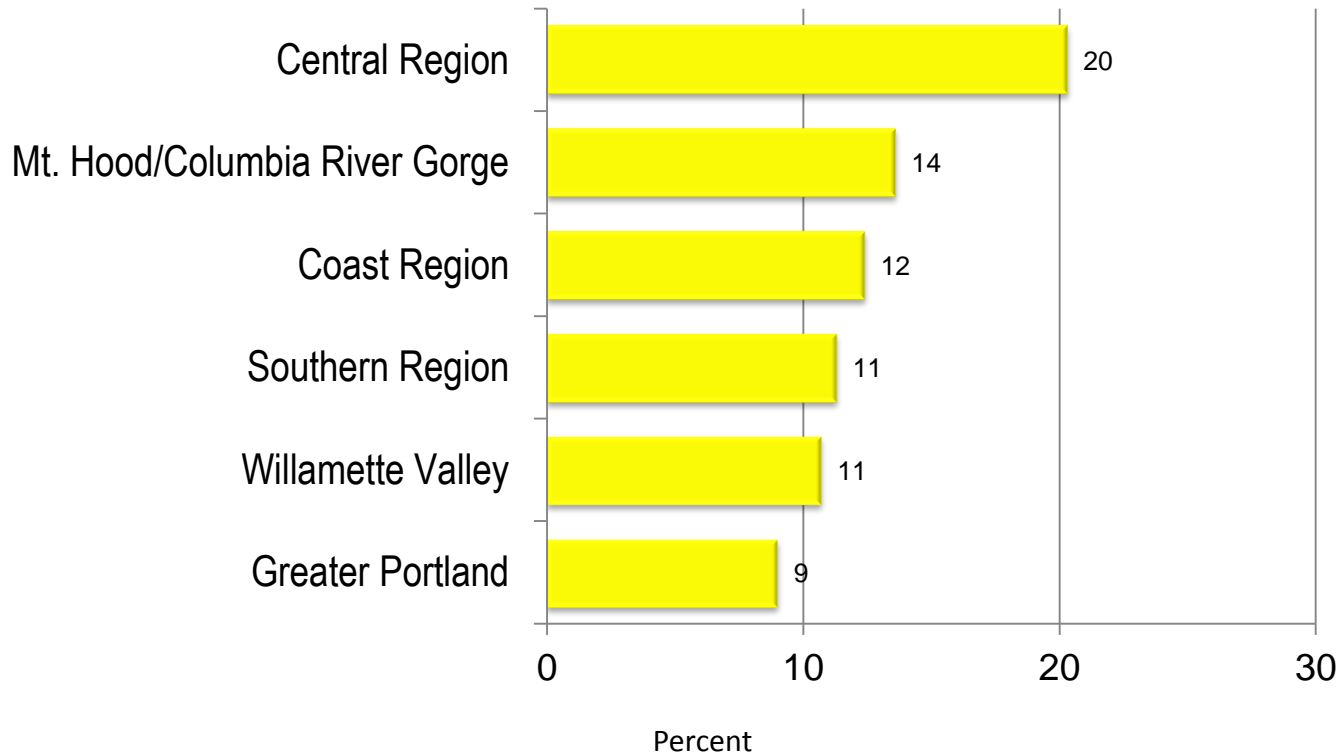
Base: Overnight Marketable Trips



Other Oregon Regions Visited on Eastern Region Trip



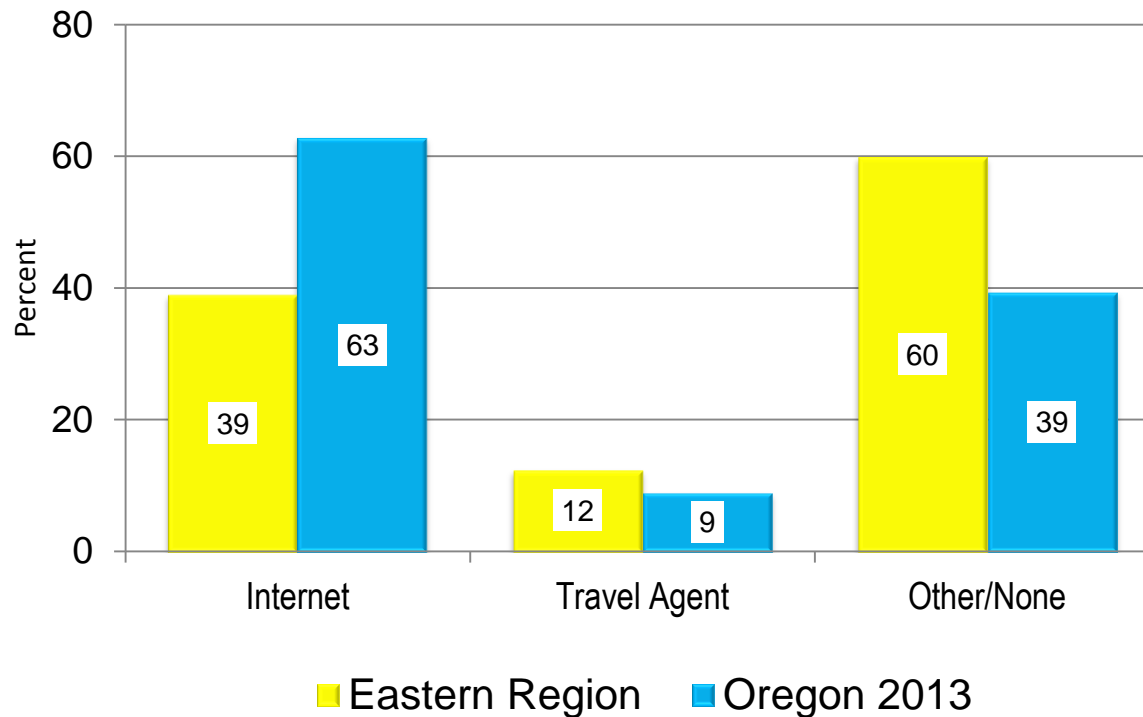
Base: Overnight Marketable Trips



Method of Planning Trip



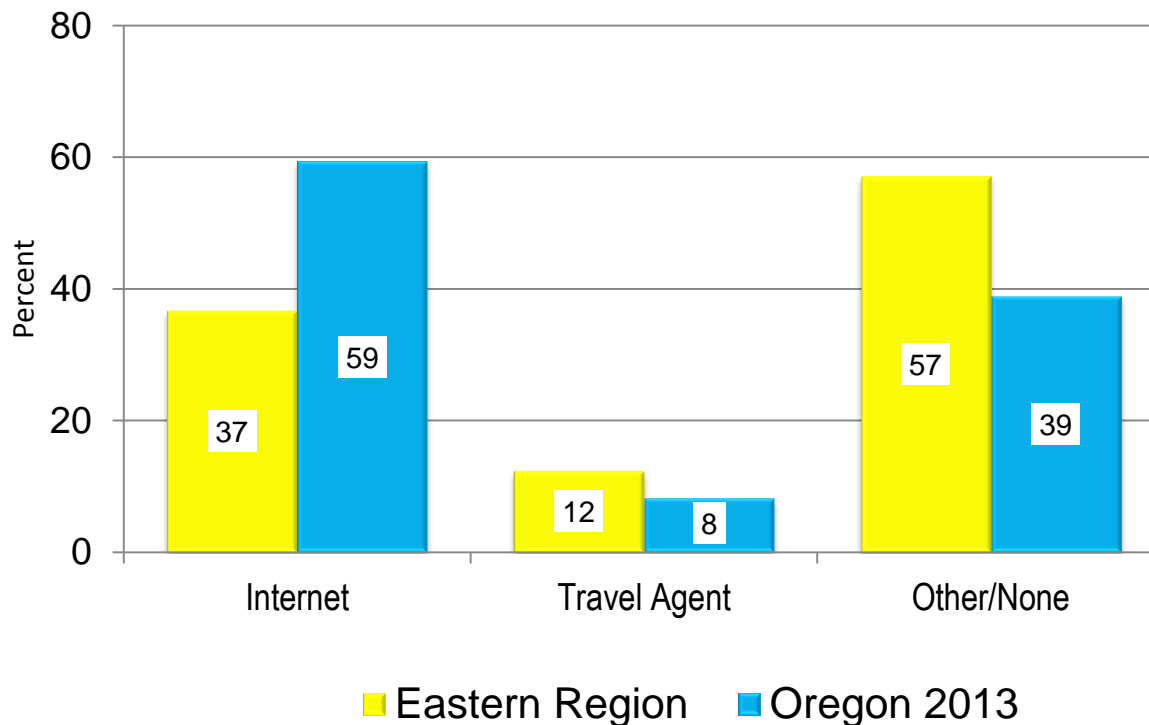
Base: Overnight Marketable Trips



Method of Booking Trip



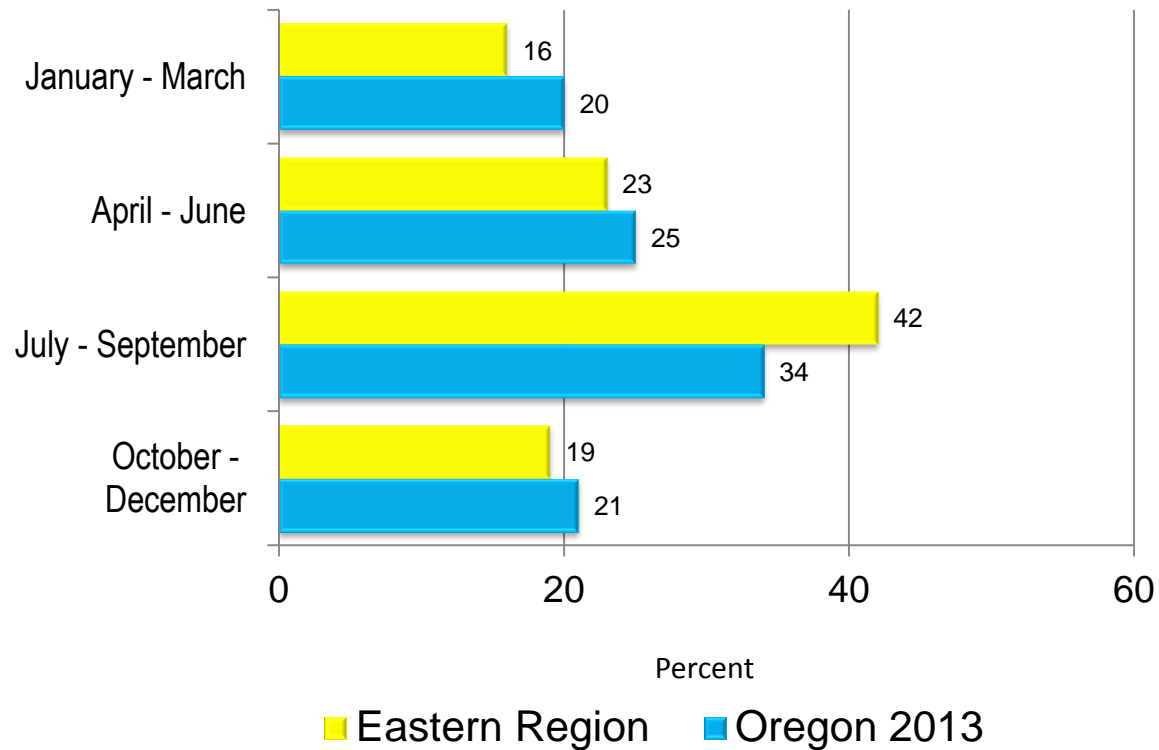
Base: Overnight Marketable Trips



Season of Trip



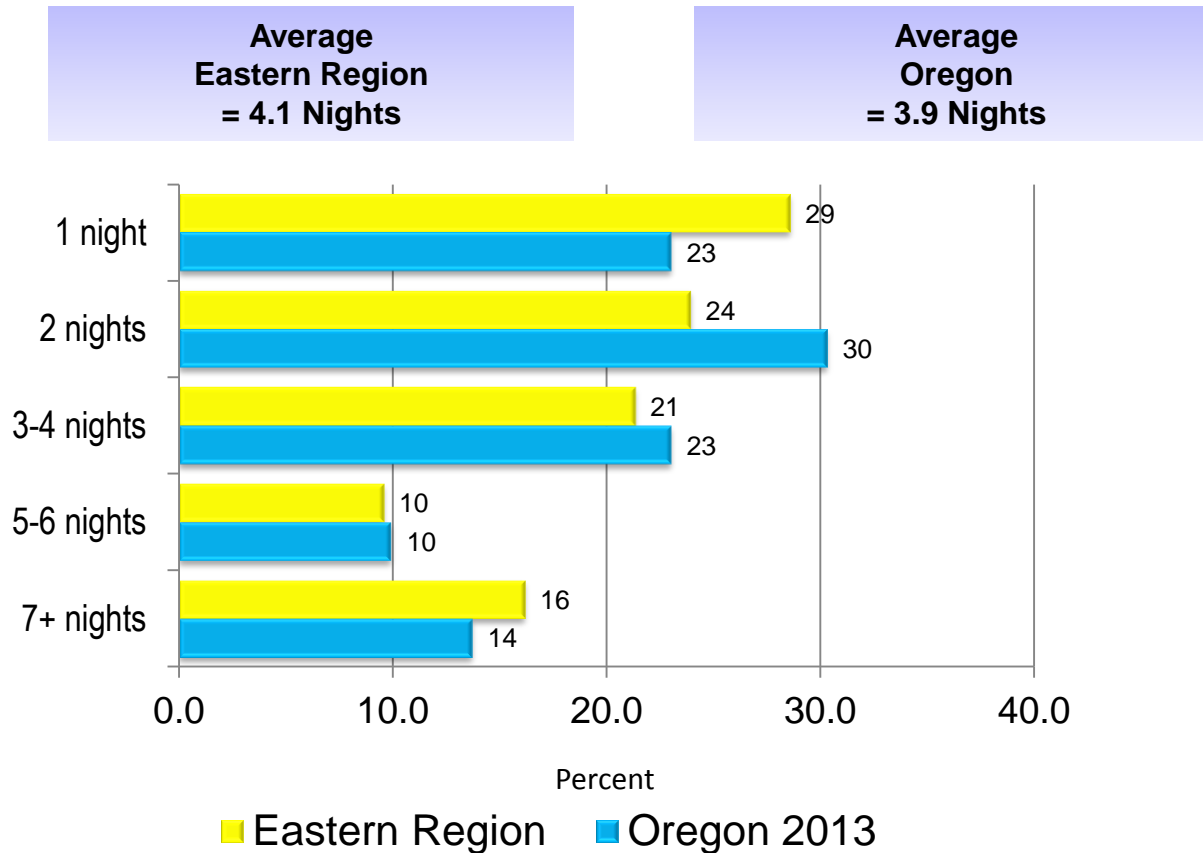
Base: Overnight Marketable Trips



Total Nights Away on Trip



Base: Overnight Marketable Trips

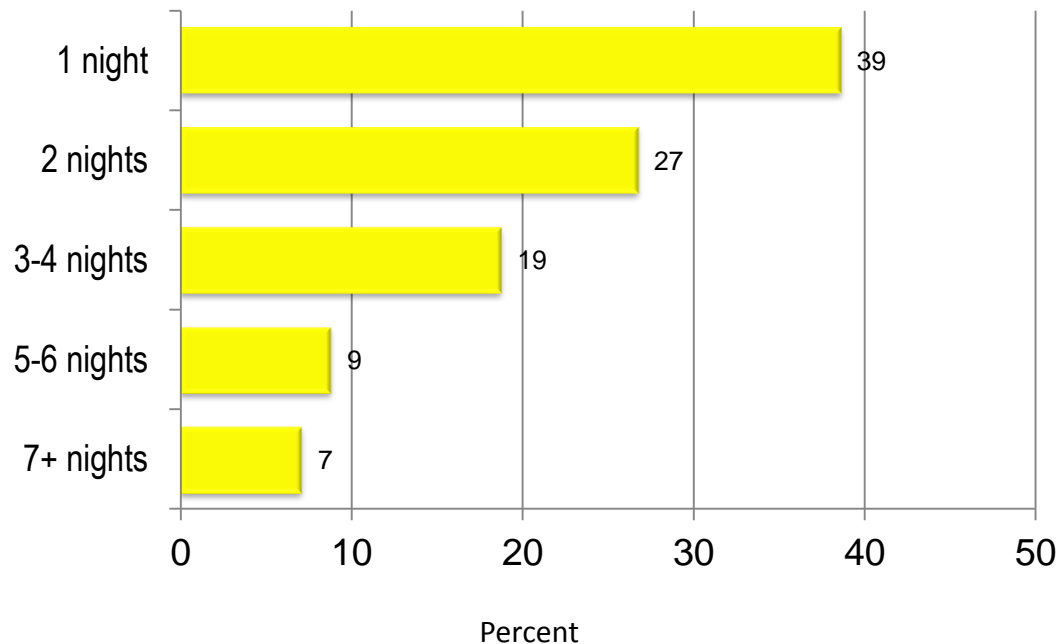


Number of Nights Spent in Eastern Region



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

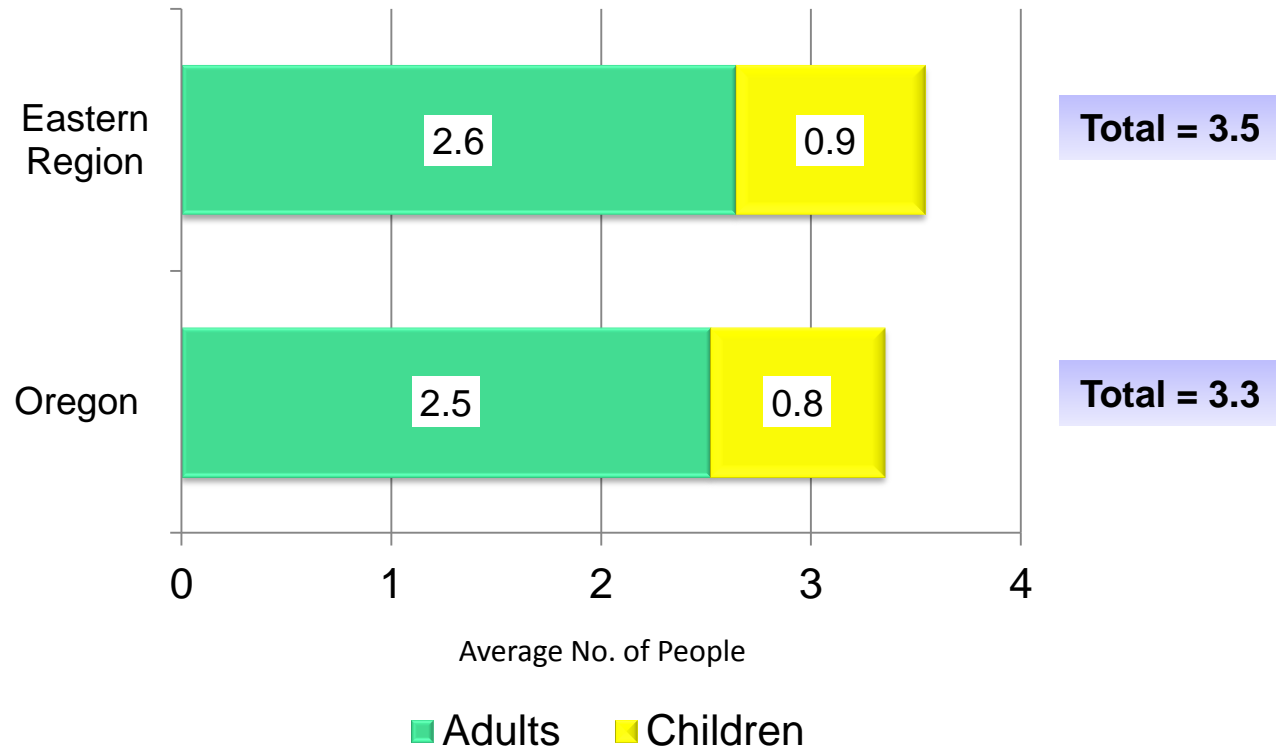
Average Nights Spent in Eastern Region = 2.7



Size of Travel Party



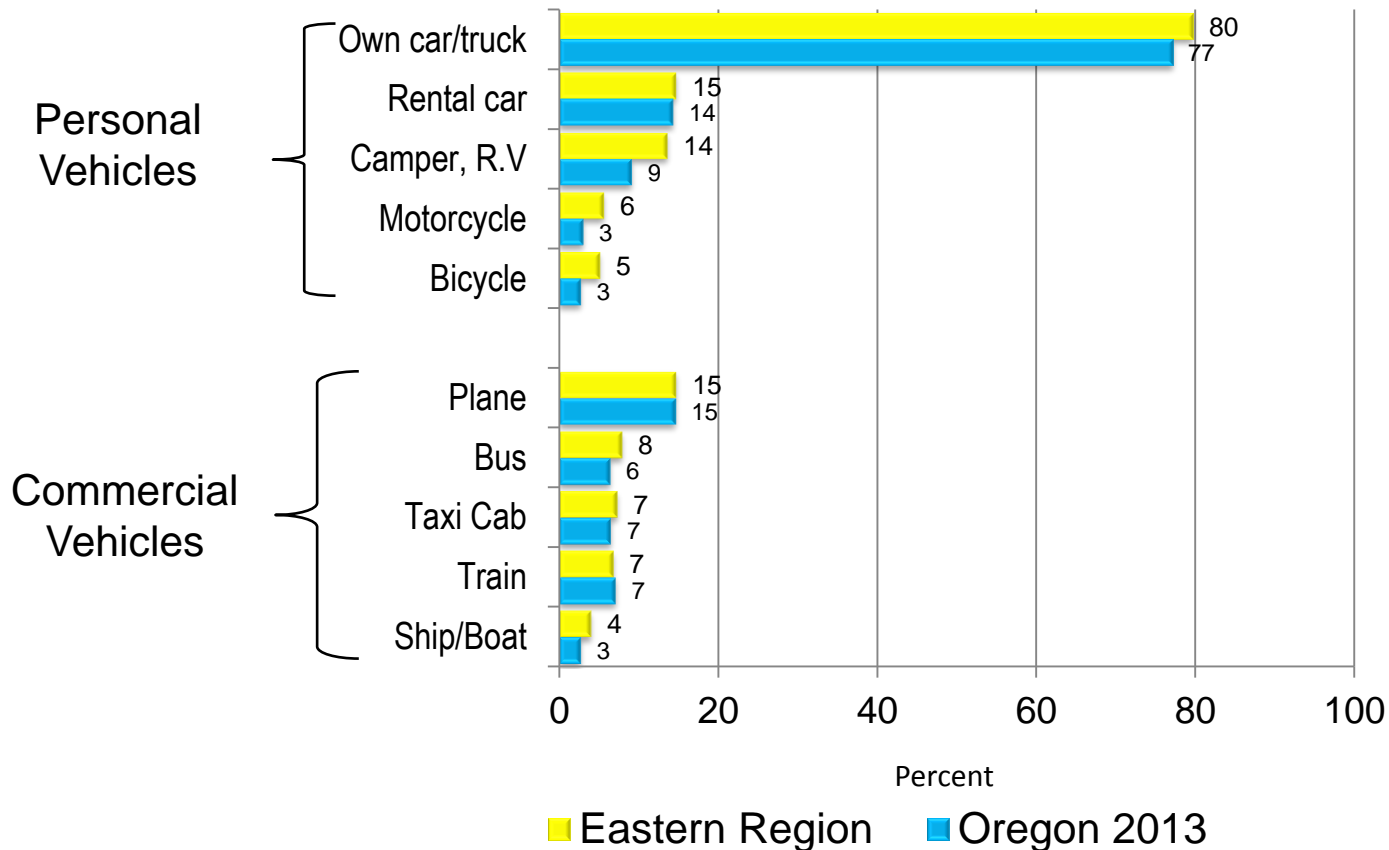
Base: Overnight Marketable Trips



Transportation



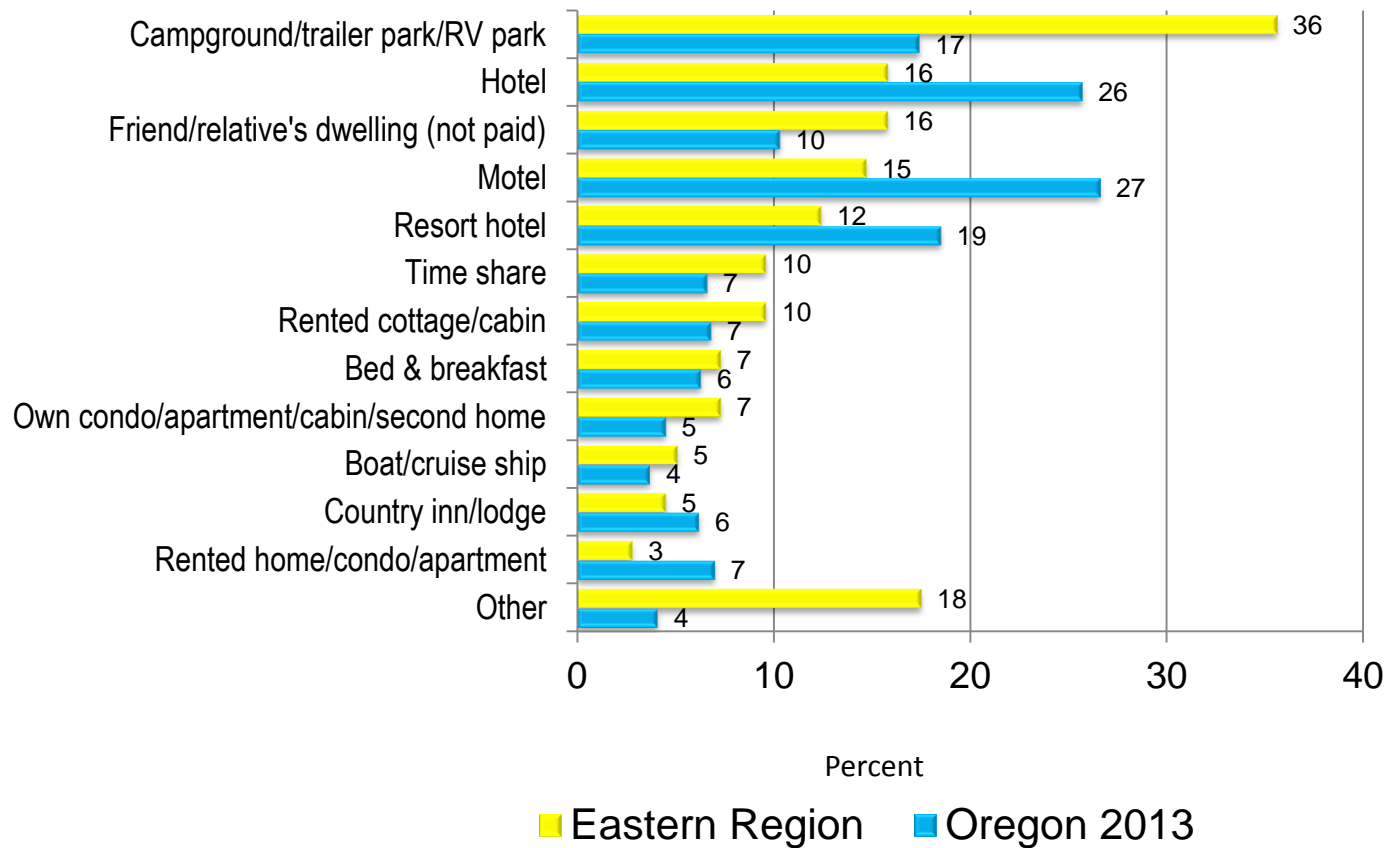
Base: Overnight Marketable Trips



Accommodation



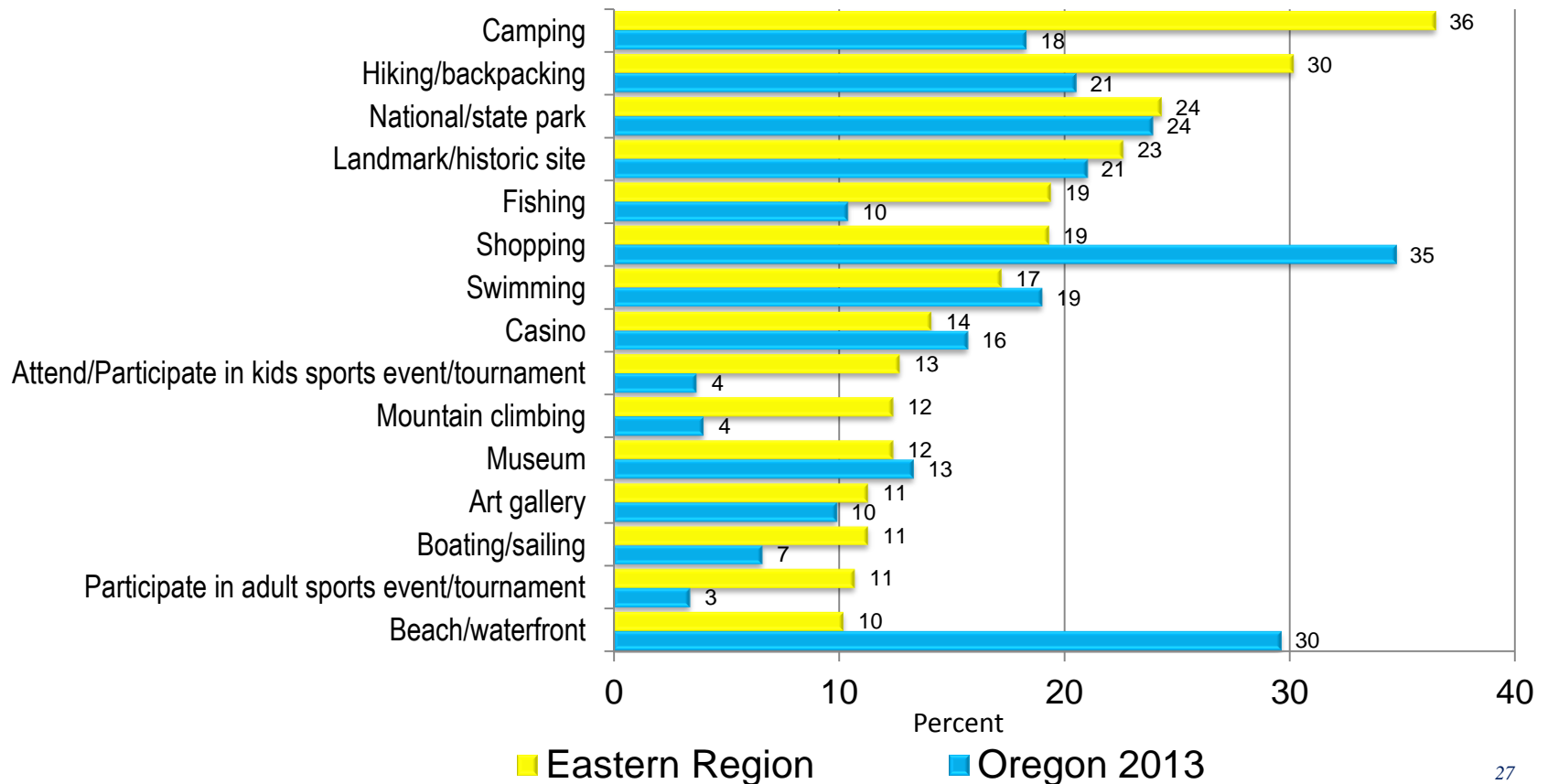
Base: Overnight Marketable Trips



Activities and Experiences



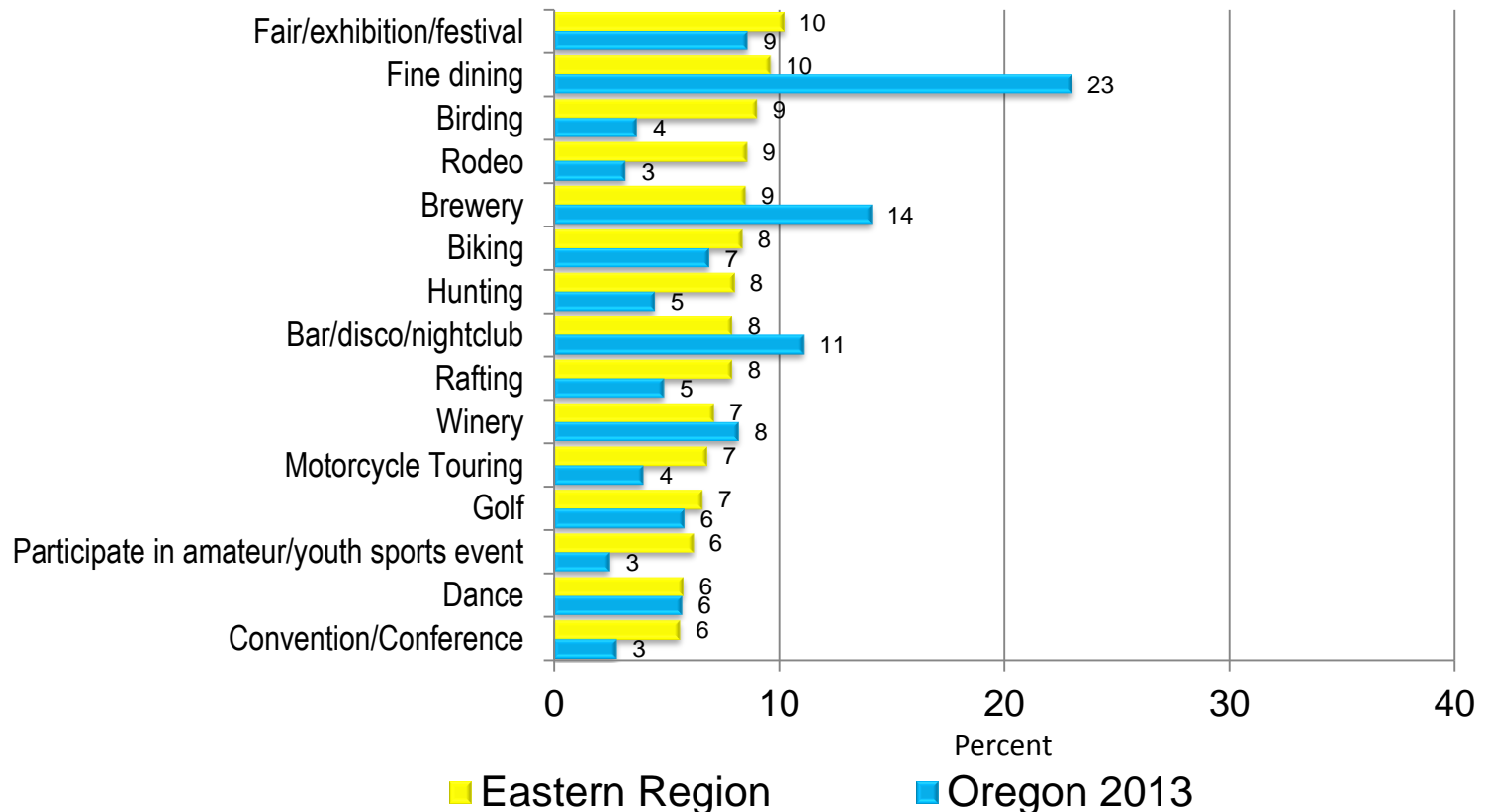
Base: Overnight Marketable Trips



Activities and Experiences (Cont'd)



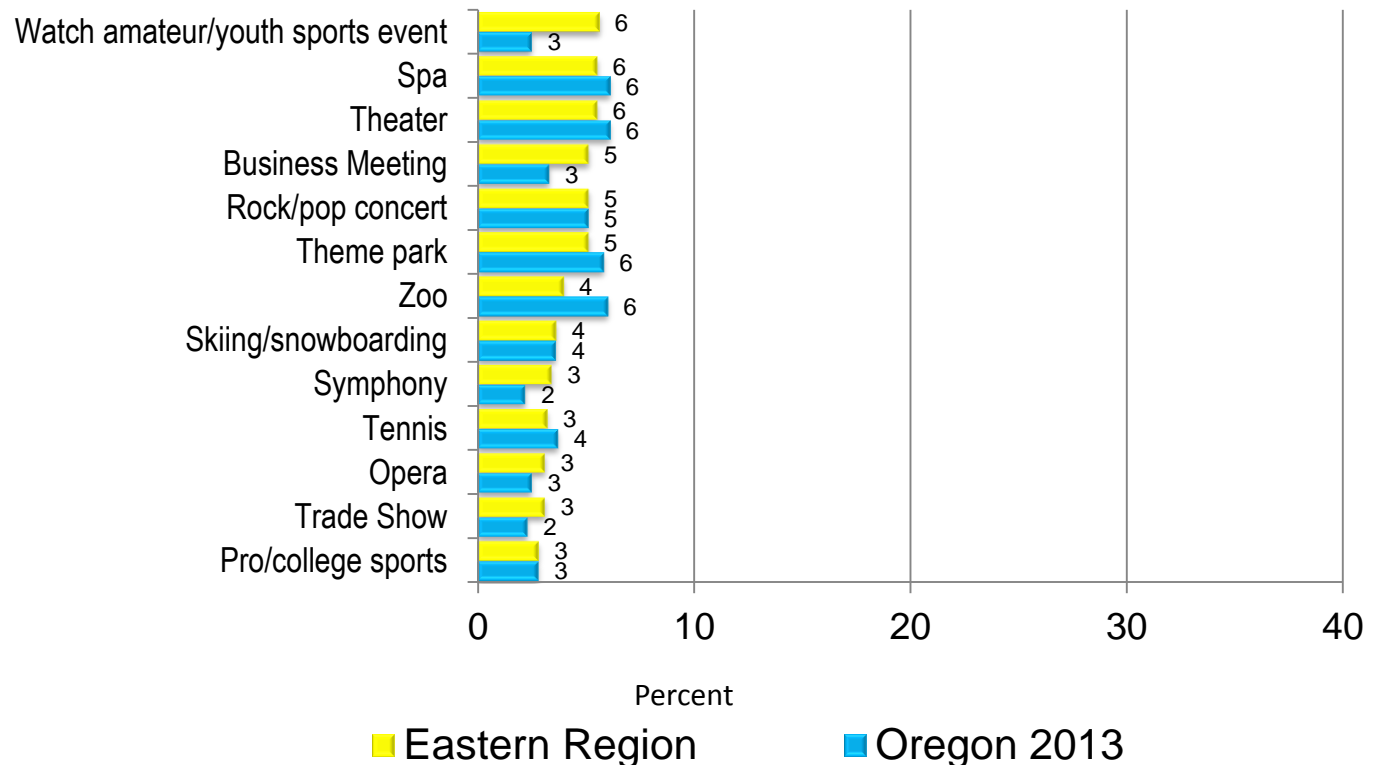
Base: Overnight Marketable Trips



Activities and Experiences (Cont'd)



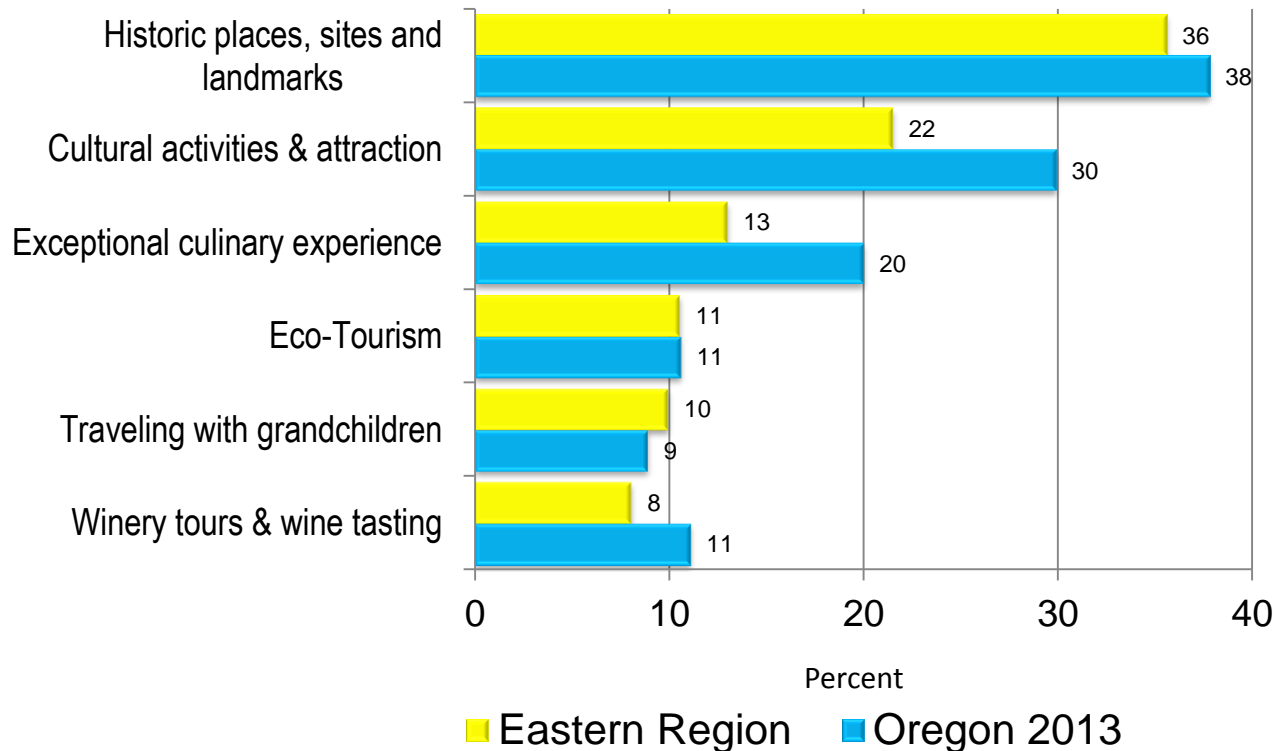
Base: Overnight Marketable Trips



Activities of Special Interest



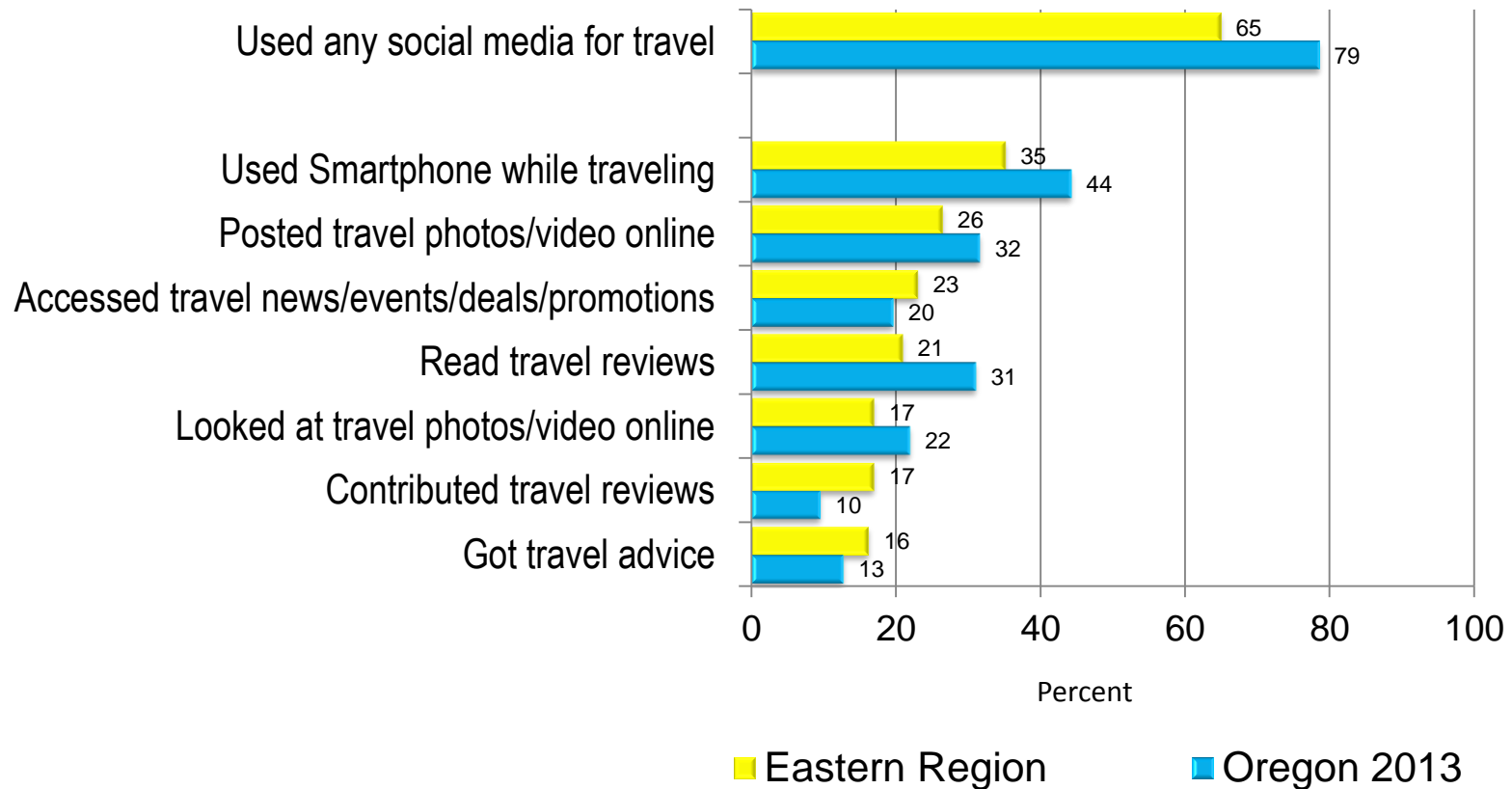
Base: Overnight Marketable Trips



Online Social Media Use by Travelers



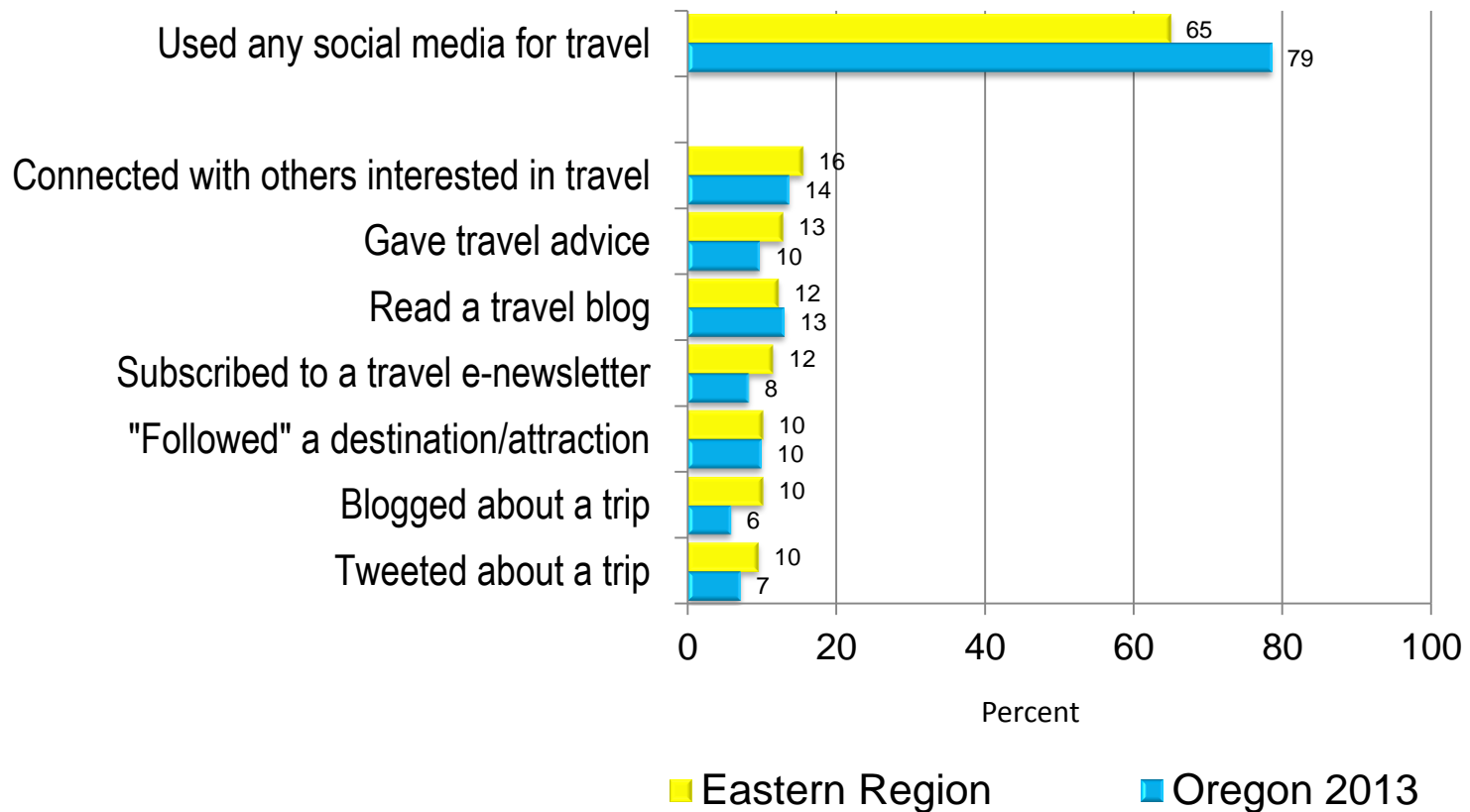
Base: Overnight Marketable Trips



Online Social Media Use by Travelers (Cont'd)



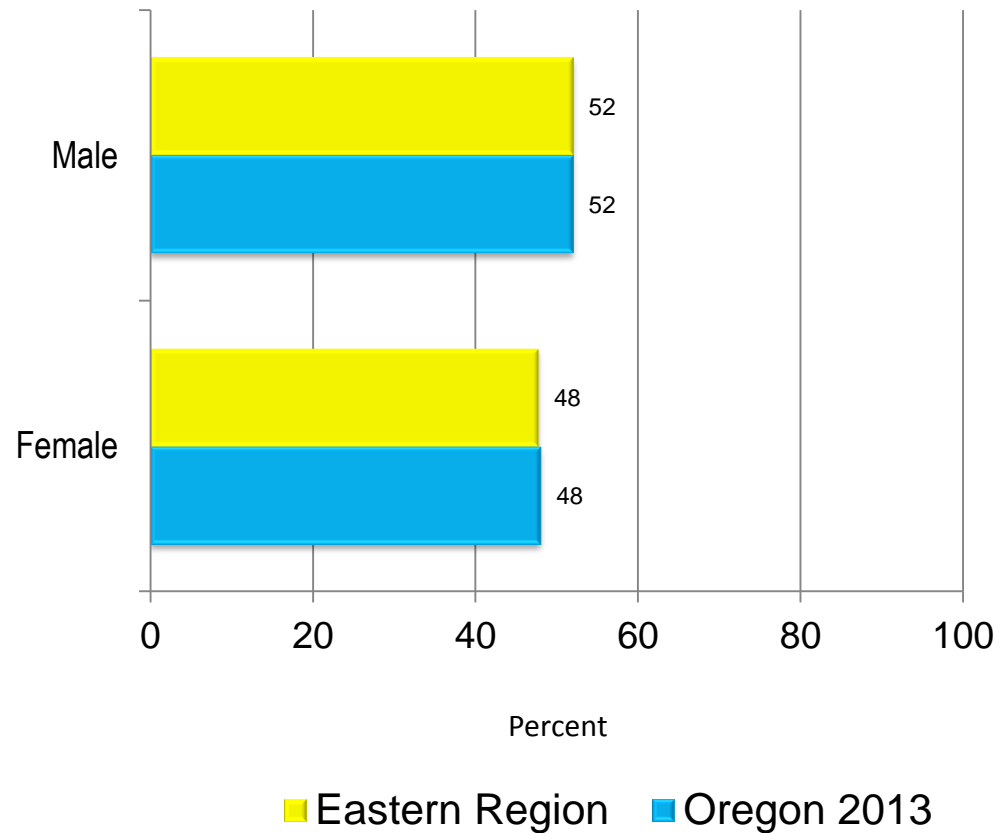
Base: Overnight Marketable Trips



Gender



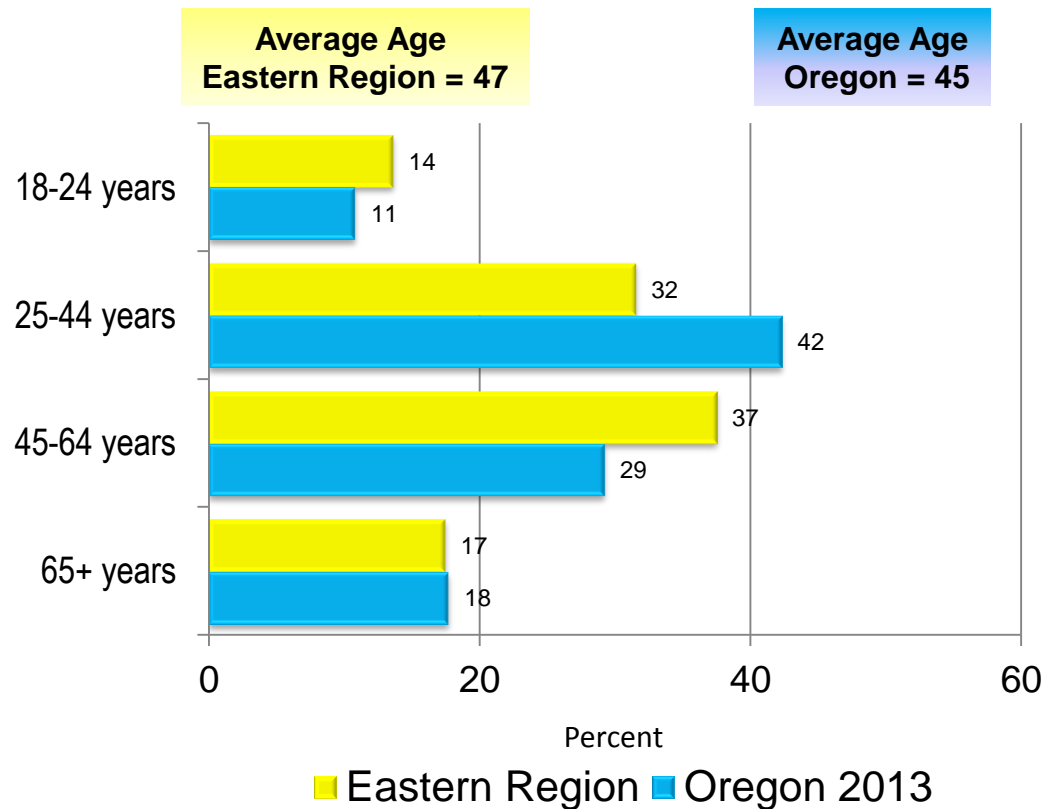
Base: Overnight Marketable Trips



Age



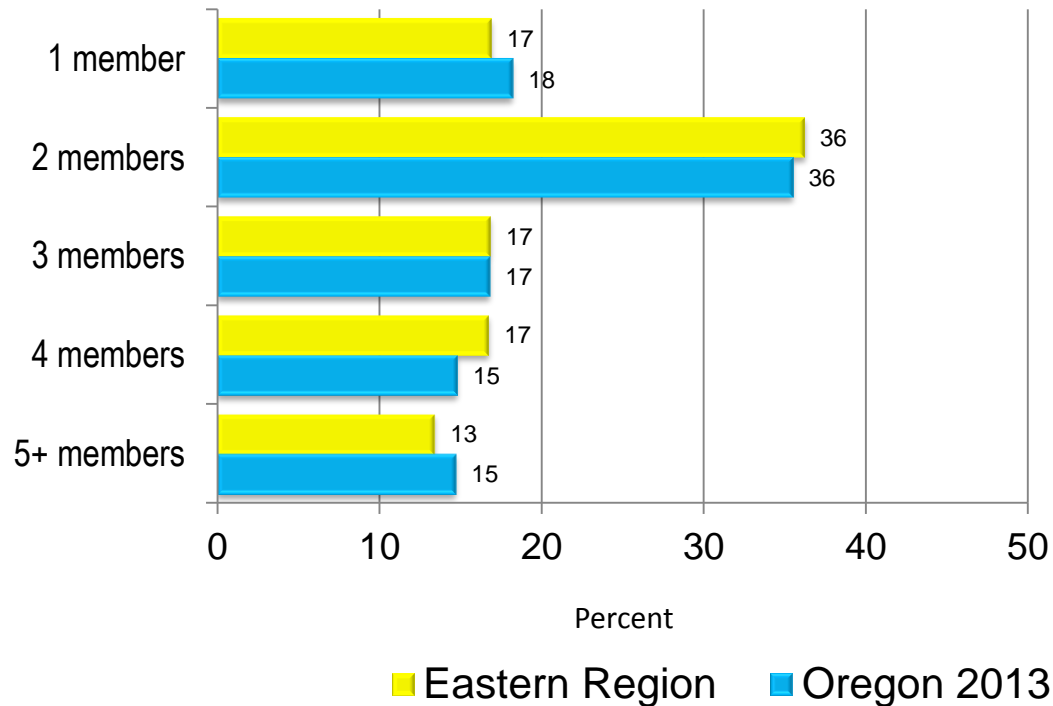
Base: Overnight Marketable Trips



Household Size



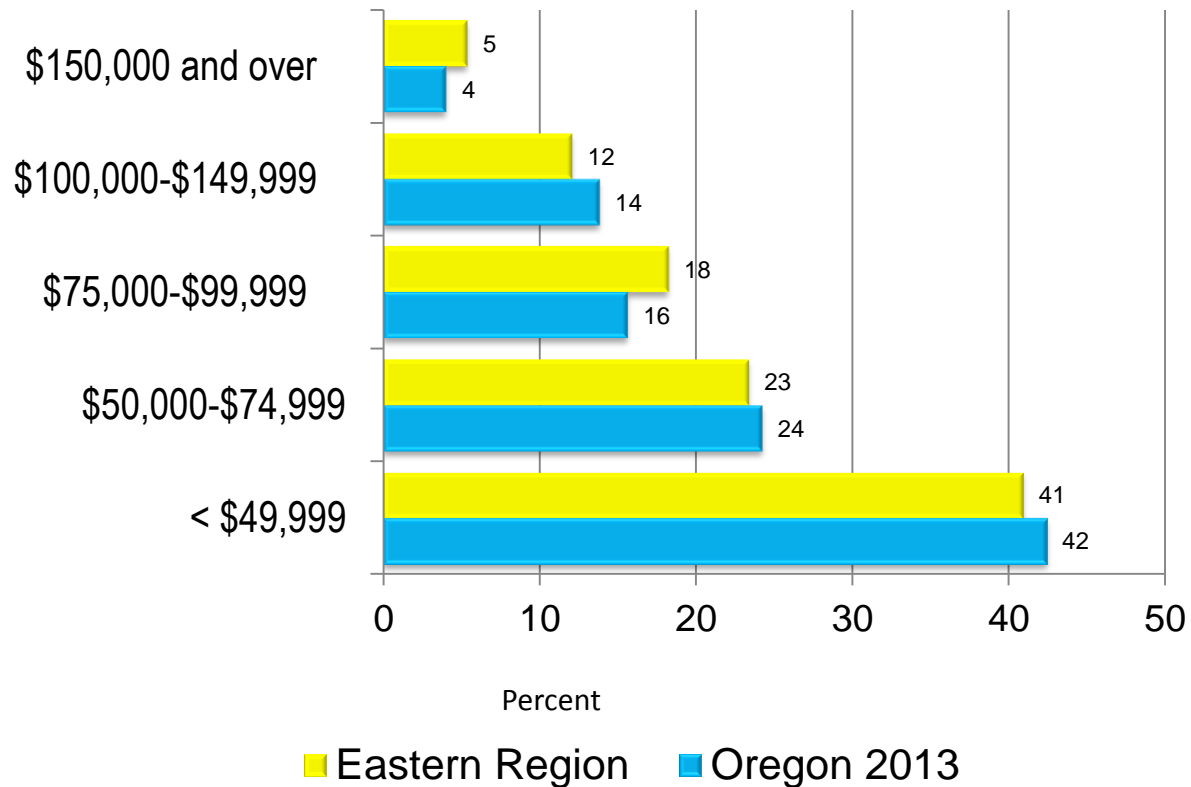
Base: Overnight Marketable Trips



Household Income



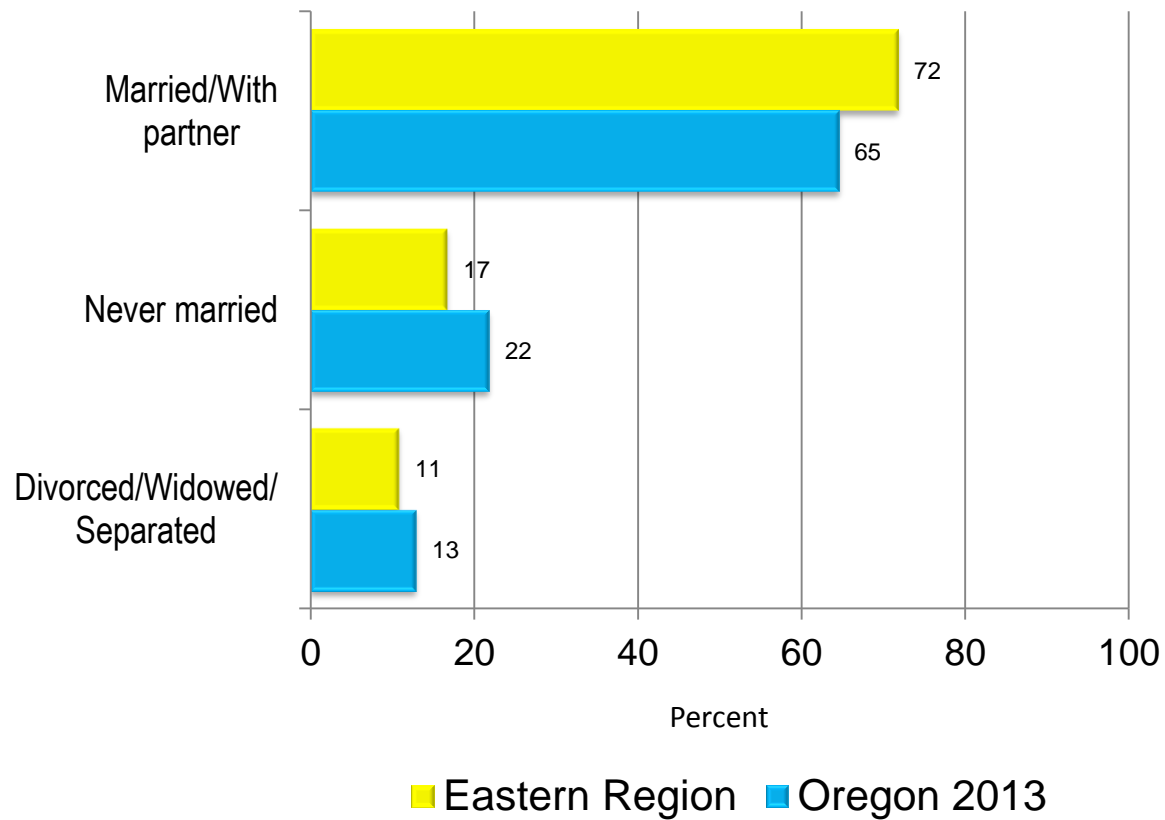
Base: Overnight Marketable Trips



Marital Status



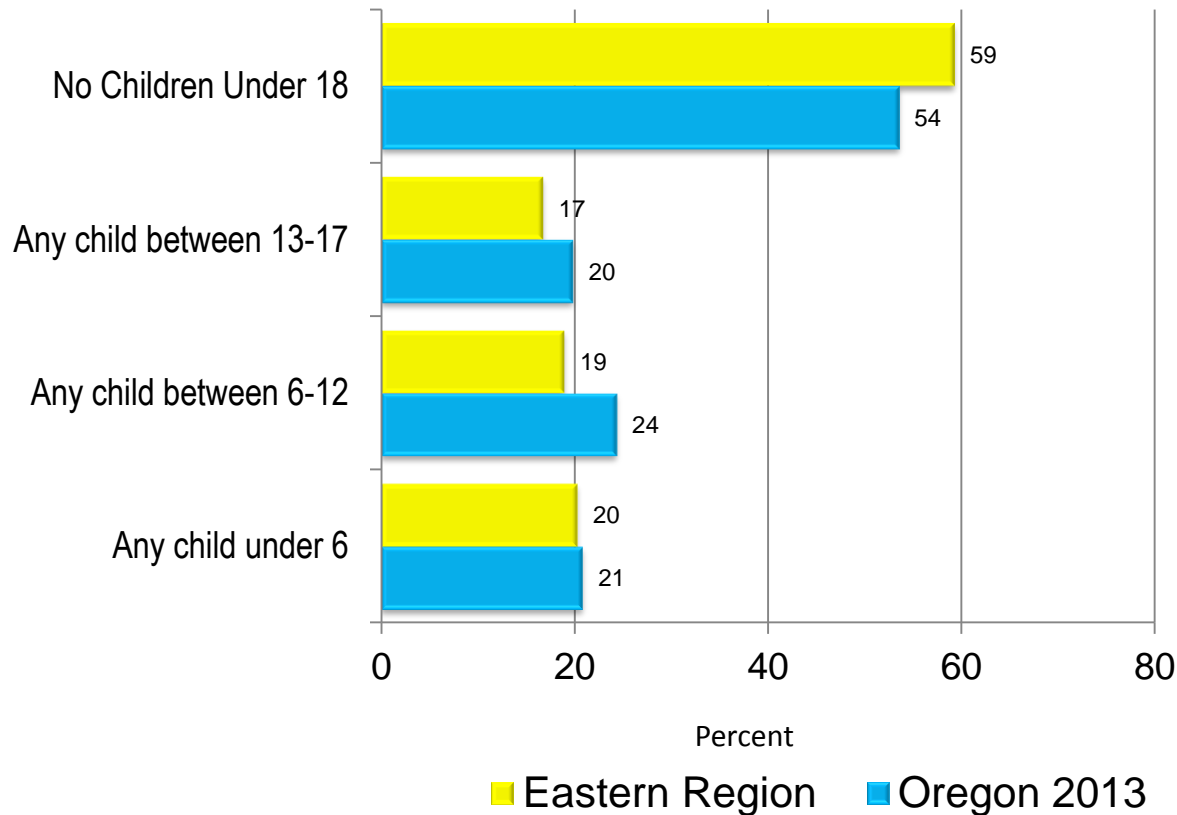
Base: Overnight Marketable Trips



Children in Household



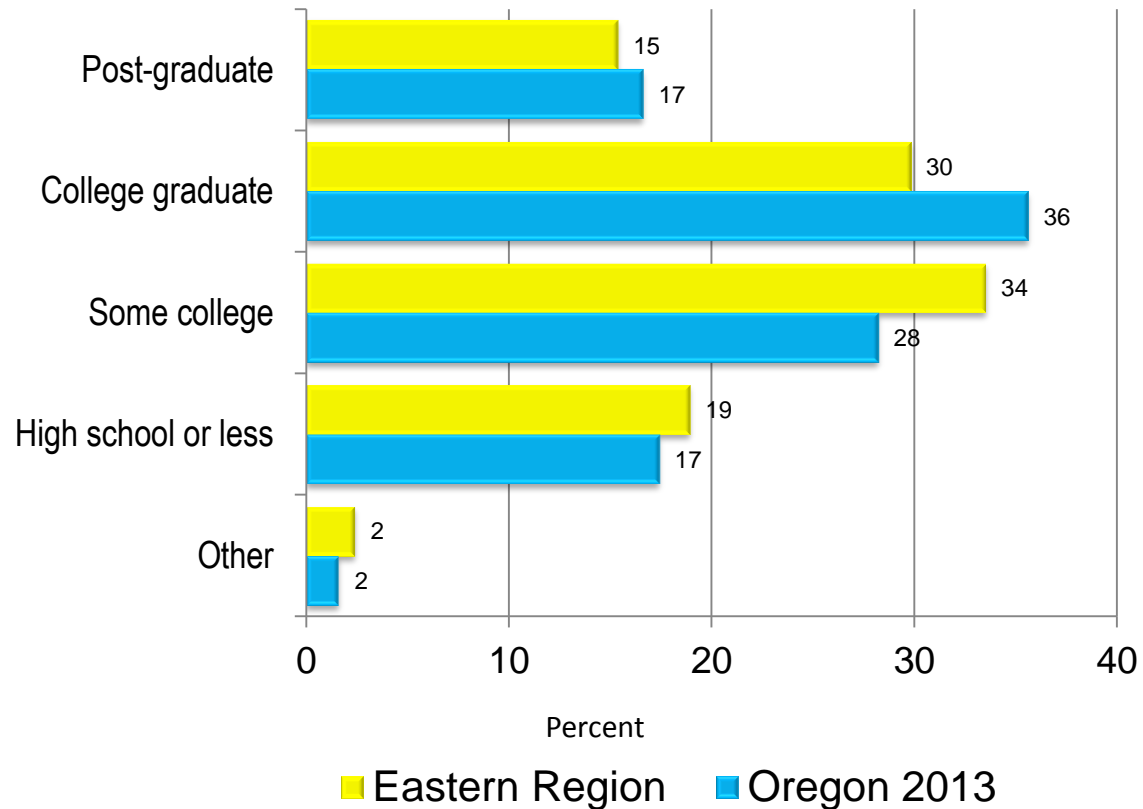
Base: Overnight Marketable Trips



Education



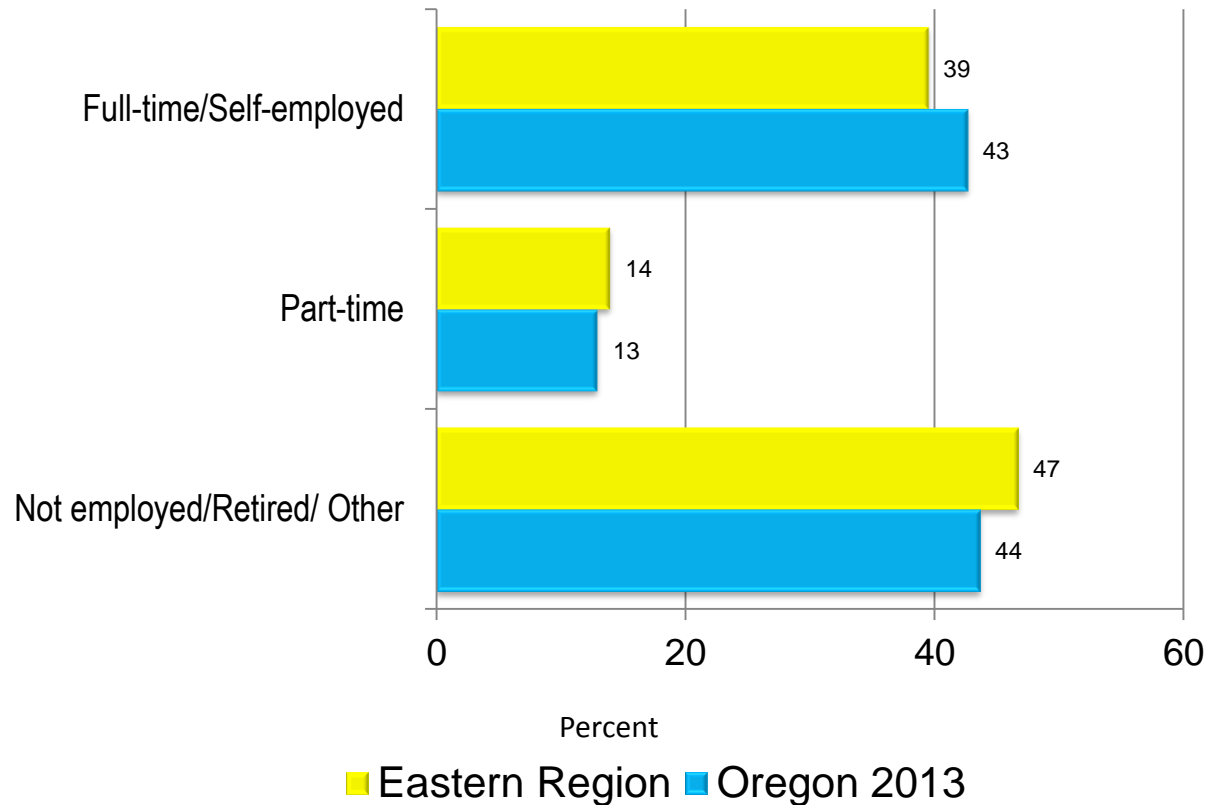
Base: Overnight Marketable Trips



Employment



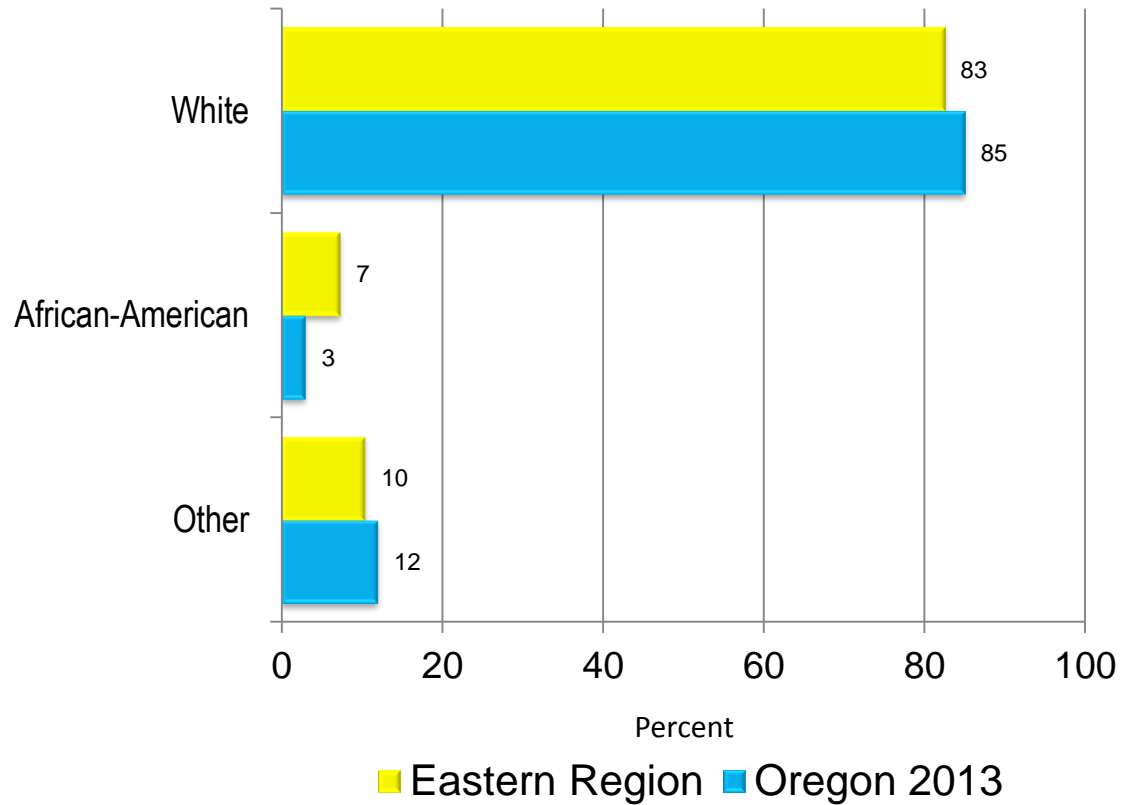
Base: Overnight Marketable Trips



Race



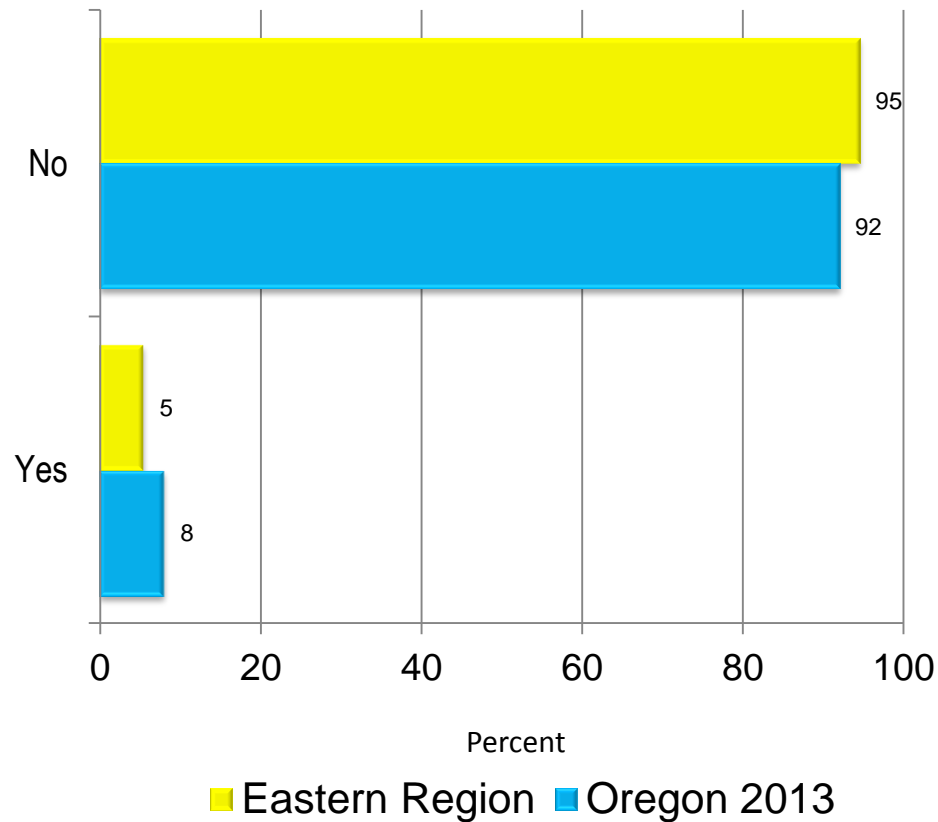
Base: Overnight Marketable Trips



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*
 - ◉ *Golf Trip*
- ◉ **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