



# Oregon 2013

## Regional Visitor Report

Willamette Valley

# Introduction



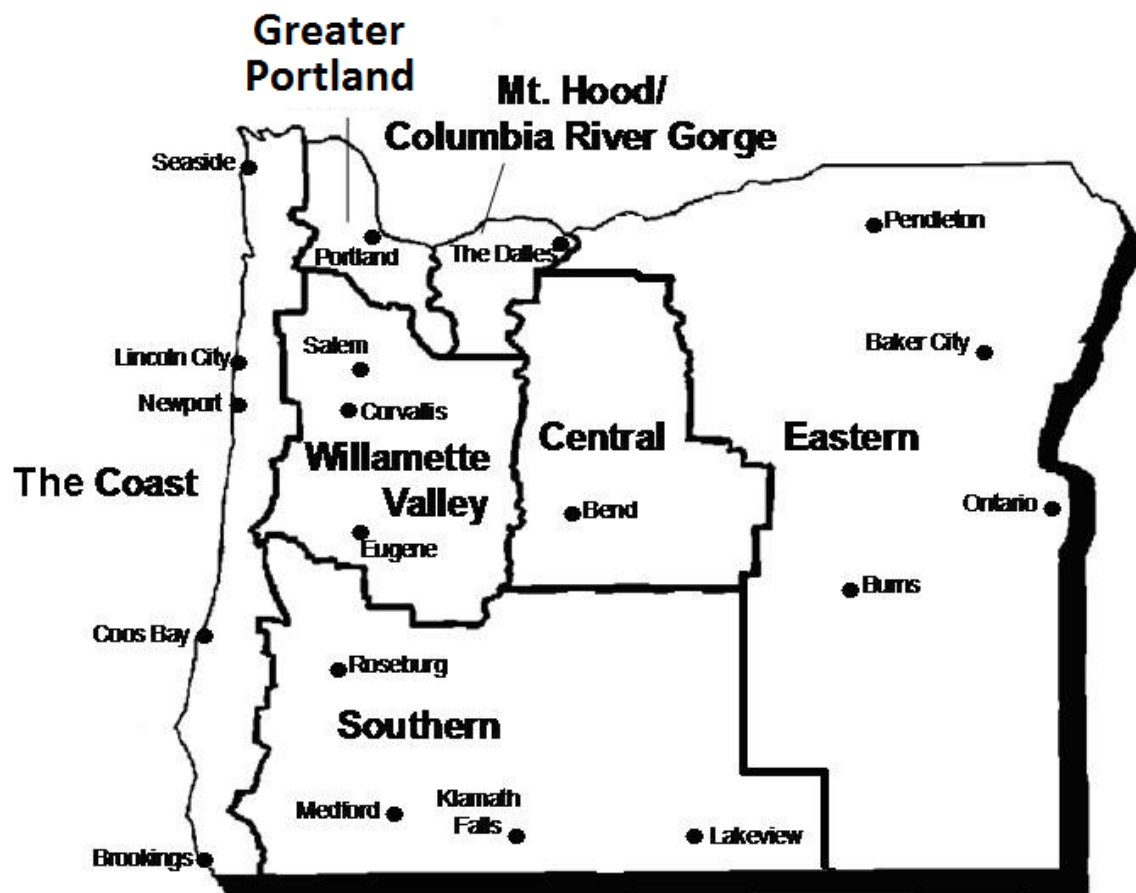
- ◉ Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- ◉ It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to 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 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 2012 and 2013 travel years, a representative sample of visitors to the Willamette Valley 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:
  - ◉ *812 included a visit to the Willamette Valley Region*
  - ◉ *Of those, 250 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 Willamette Valley Region are reported for the 2013 travel year, as are all Oregon state norms.
  - ◉ To maximize statistical reliability, other Willamette Valley Region data (trip characteristics and visitor profiles) are based on two years' combined sample from 2012 and 2013.

# Travel Market Size & Structure

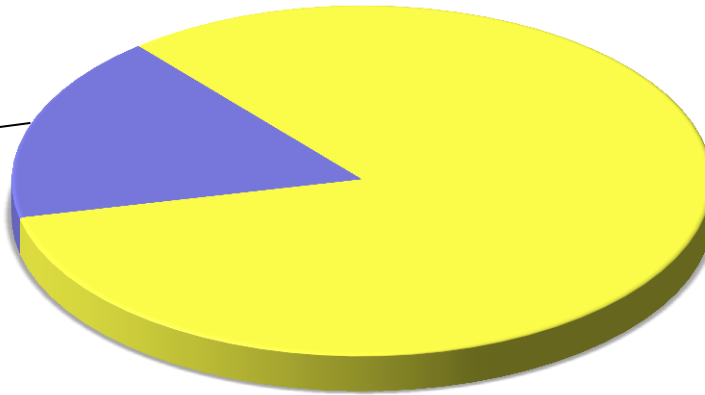
## - 2013

# Size of the Willamette Valley Region's Overnight Travel Market



**Total Overnight Trips to Oregon\* = 30.6 Million**

Spent Time in  
the  
Willamette  
Valley Region  
17%  
5.2 Million

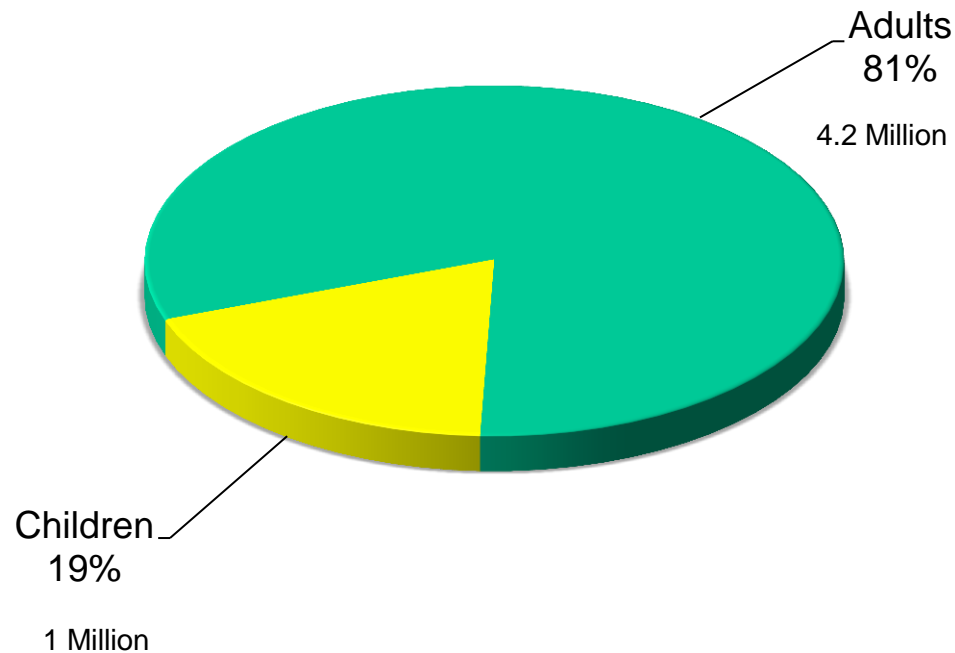


\*Includes both adults and children

# The Willamette Valley Region's Overnight Travel Market — Adults vs. Children

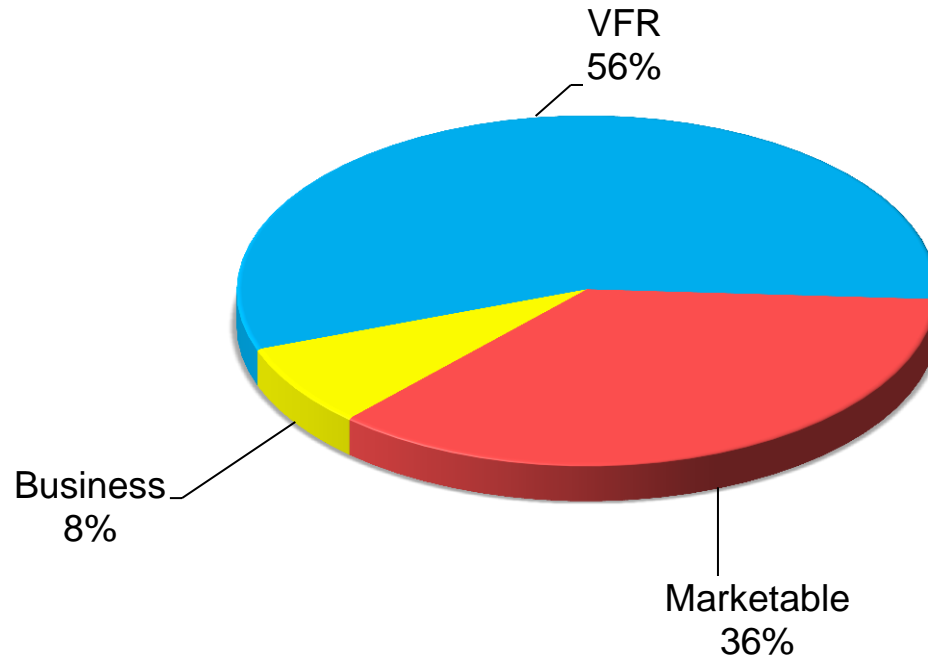


**Total Overnight Trips to the  
Willamette Valley Region = 5.2 Million**





# The Willamette Valley Region's Overnight Travel Market - by Trip Purpose



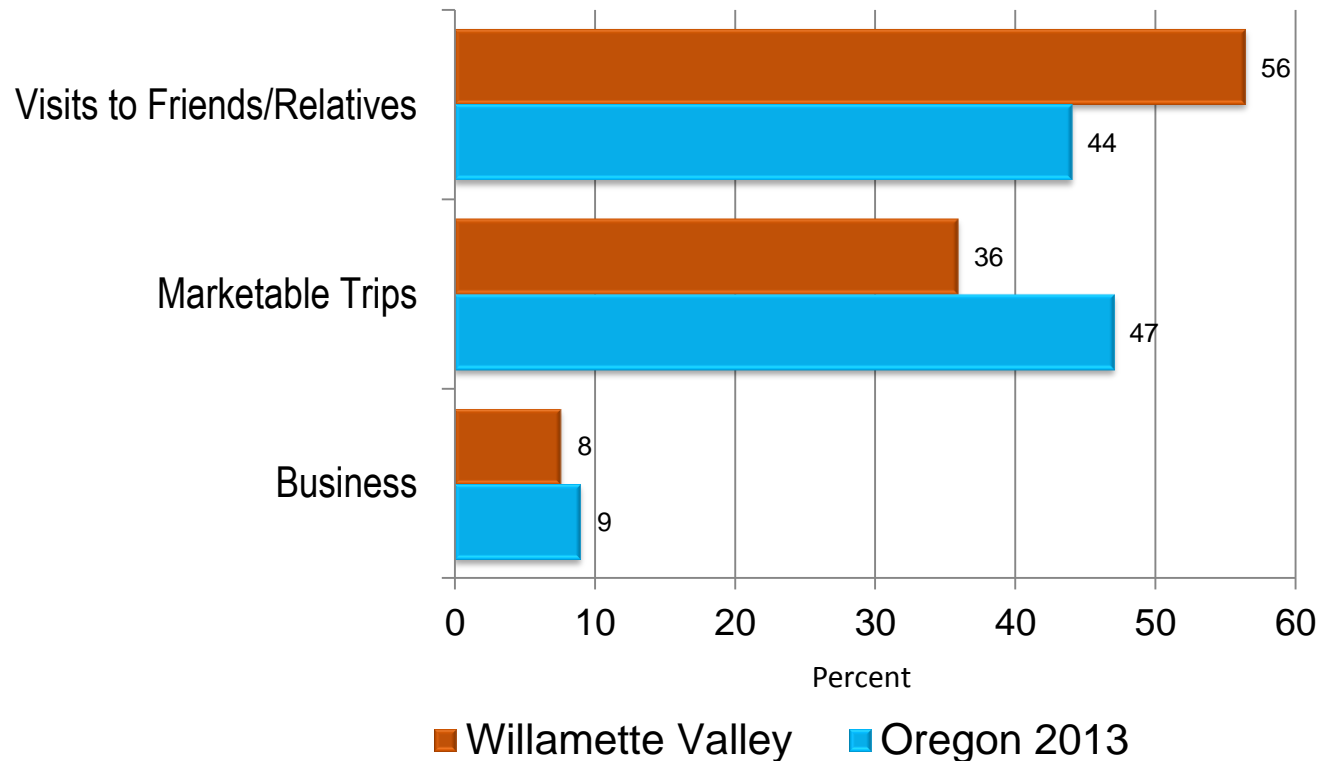
\*Marketable includes Business-Leisure

# The Willamette Valley Region vs. Oregon State – by Trip Purpose



Base: 2011 Overnight Trips

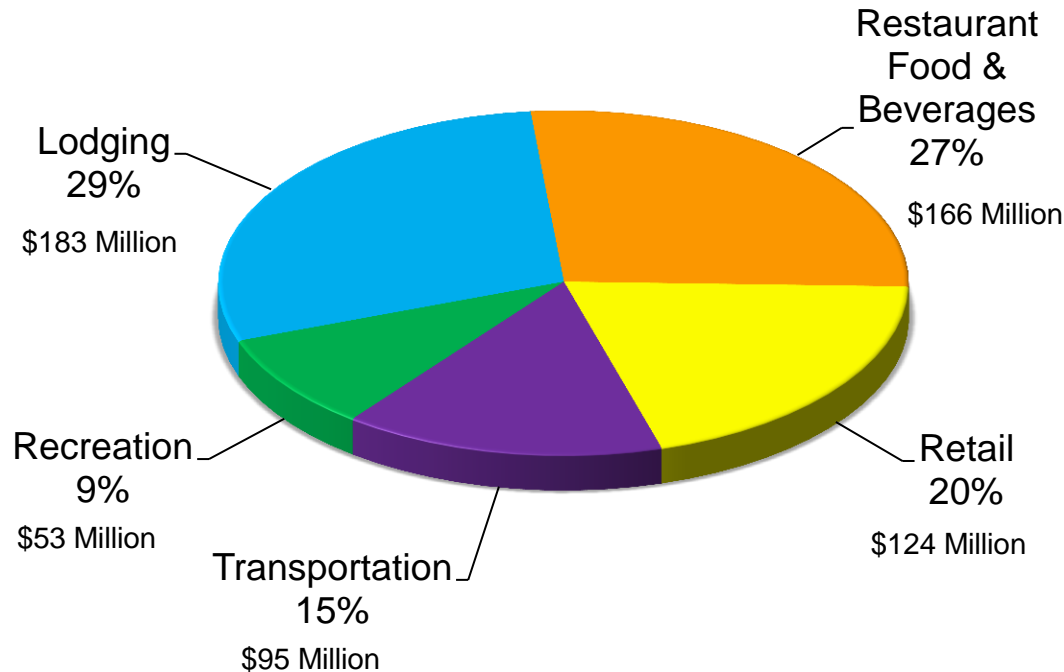
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# 2013 Overnight Spending — by Sector



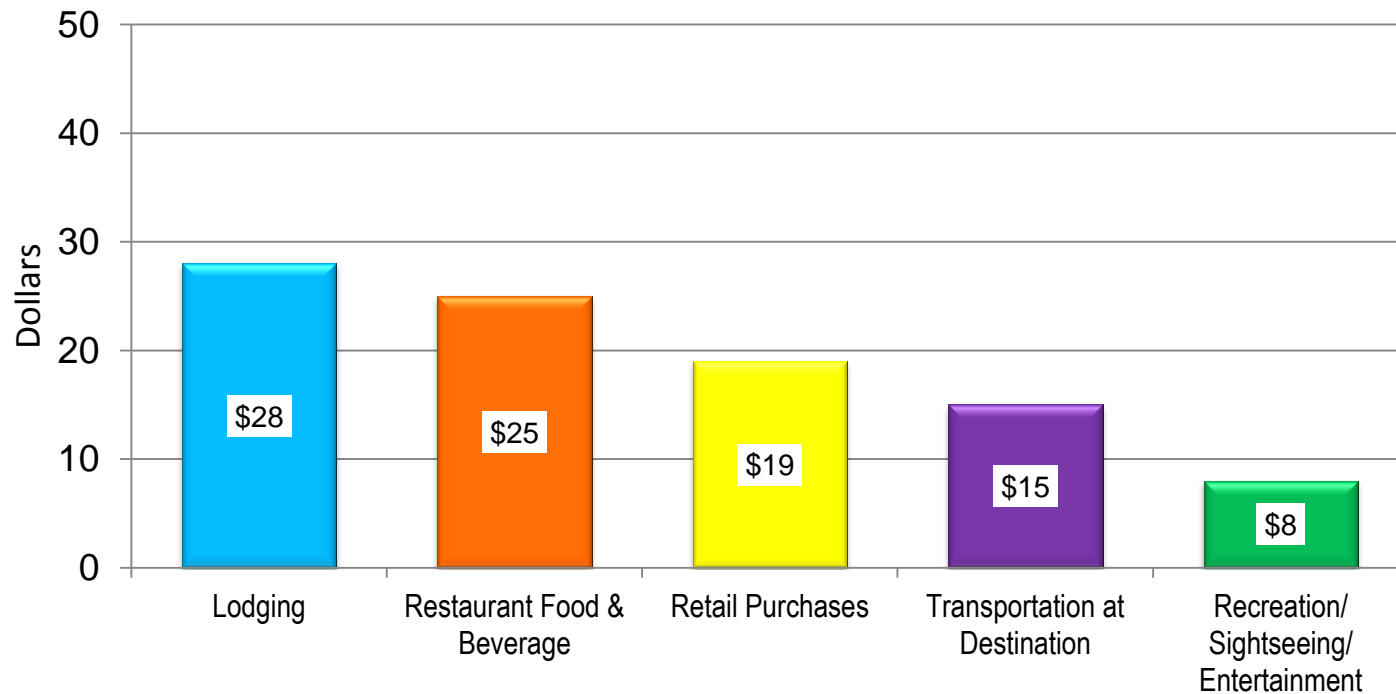
**2013 Willamette Valley Region Spending = \$621 Million**



# Average Per Person Expenditures on Overnight Trips — By Sector



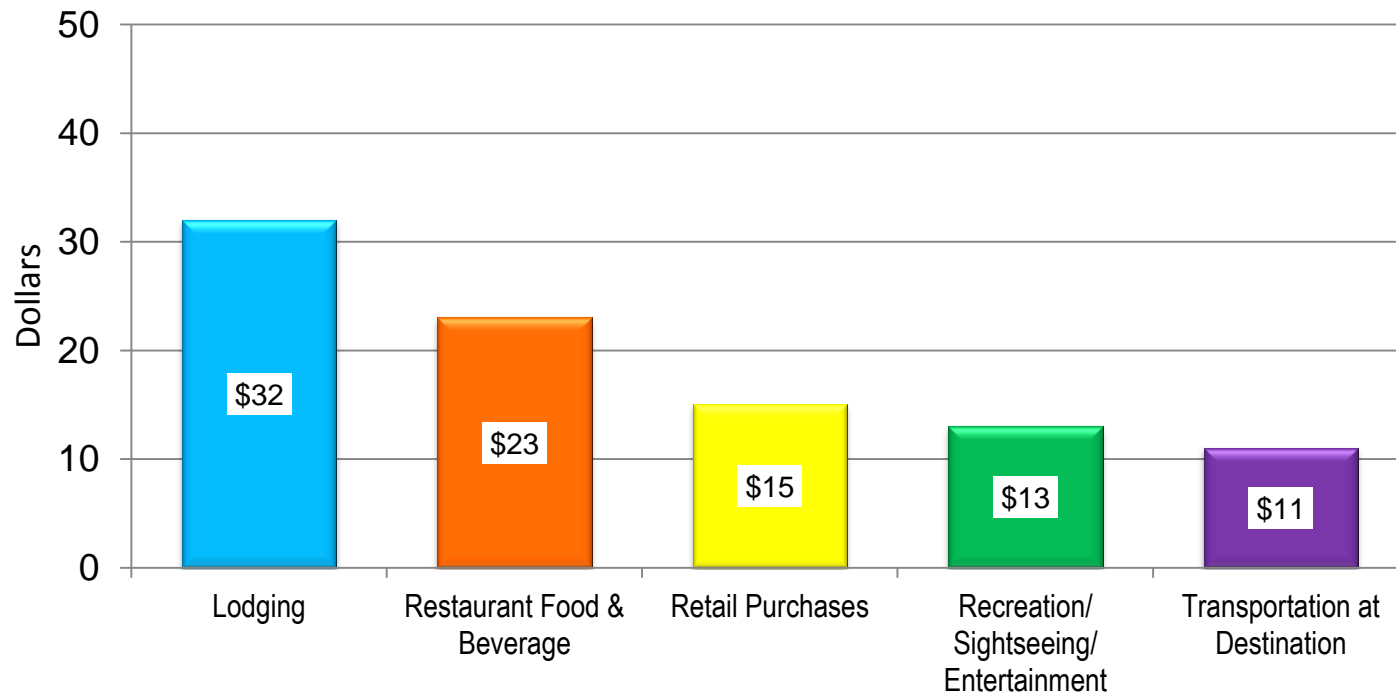
Base: Total Overnight Person-Trips



# Average Per Person Expenditures on Overnight Marketable Trips — By Sector



Base: 2011 Overnight Marketable Trips

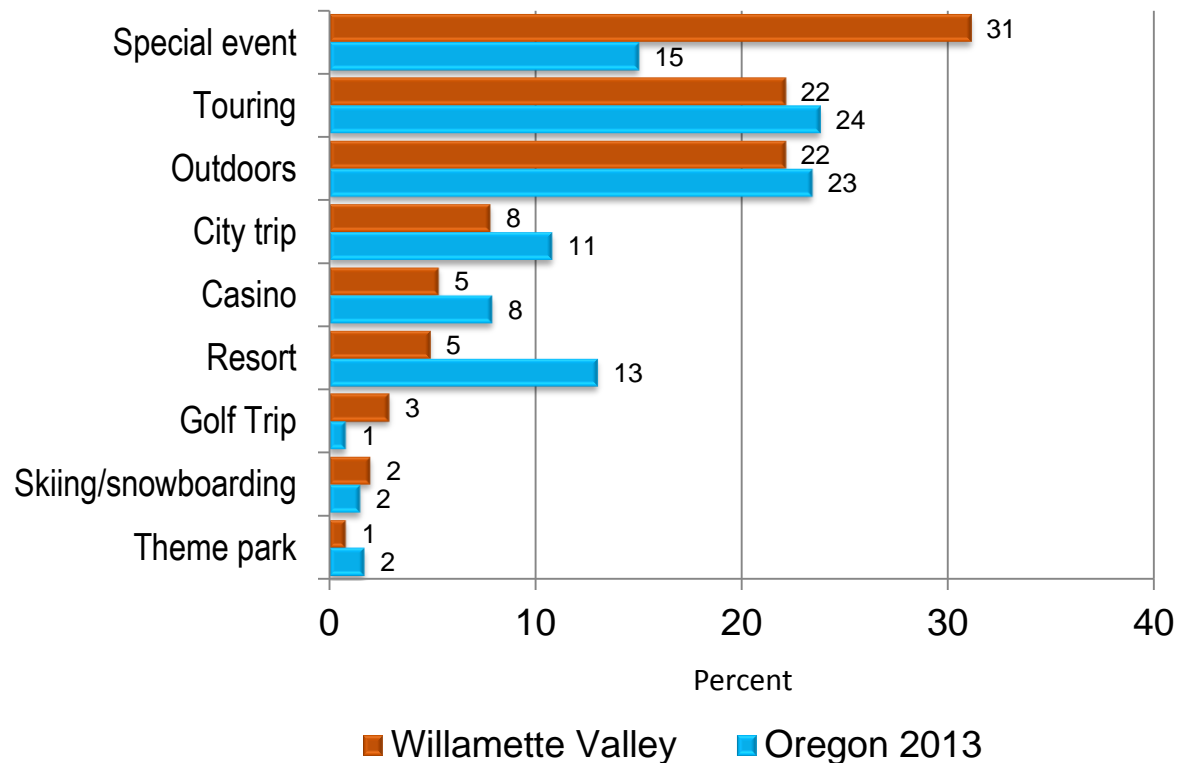


# Marketable Trip Characteristics and Visitor Profile – 2012/2013

# Main Purpose of Marketable Trip — Willamette Valley vs. State Norm



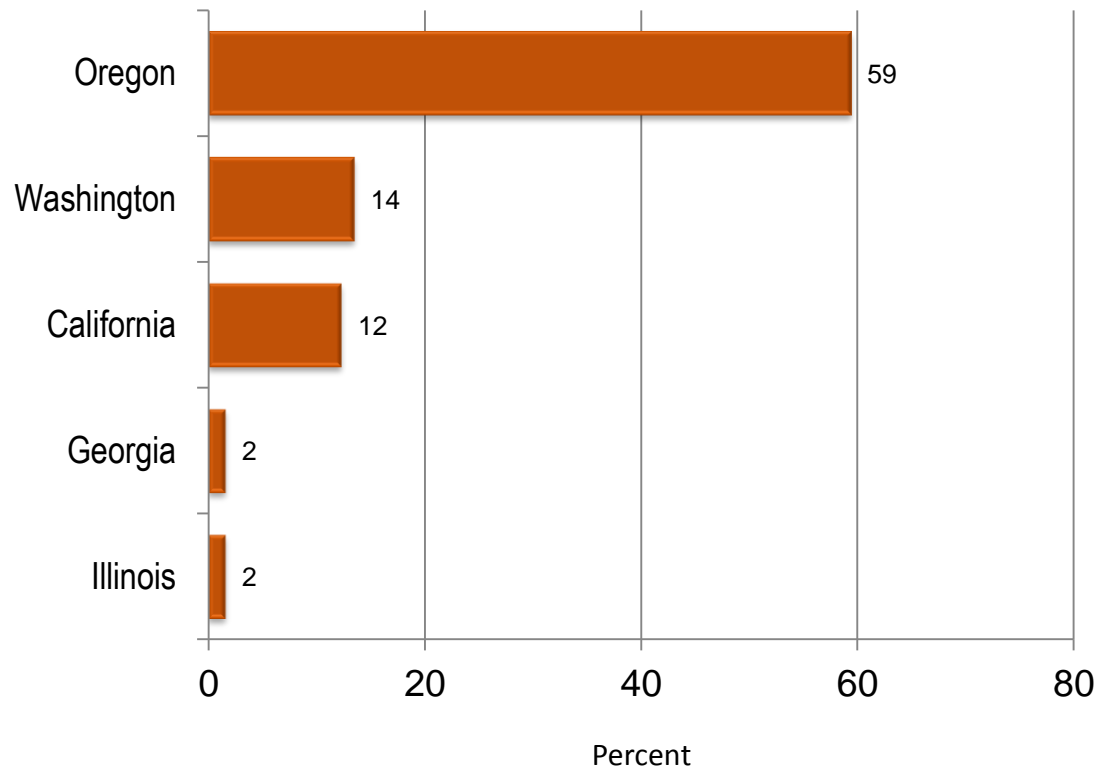
Base: Overnight Marketable Trips



# State Origin Of Overnight Trip



Base: Overnight Marketable Trips

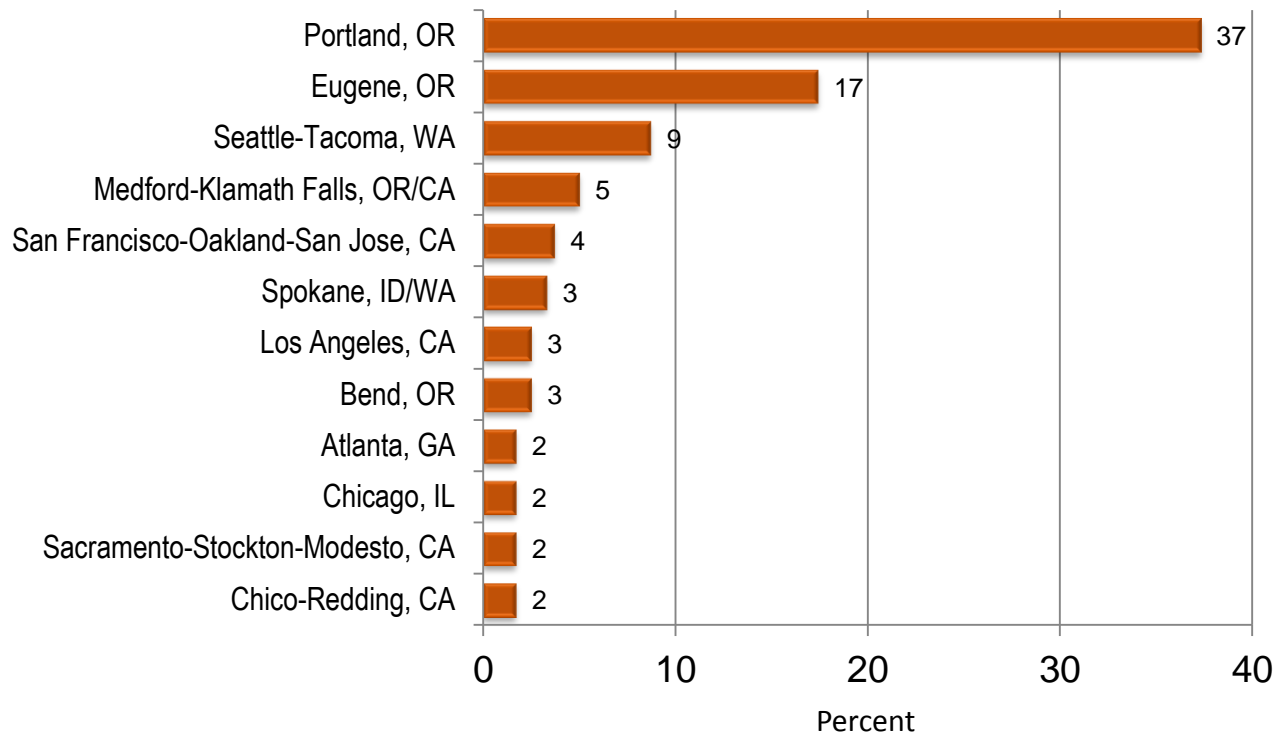




# DMA Origin Of Overnight Trip



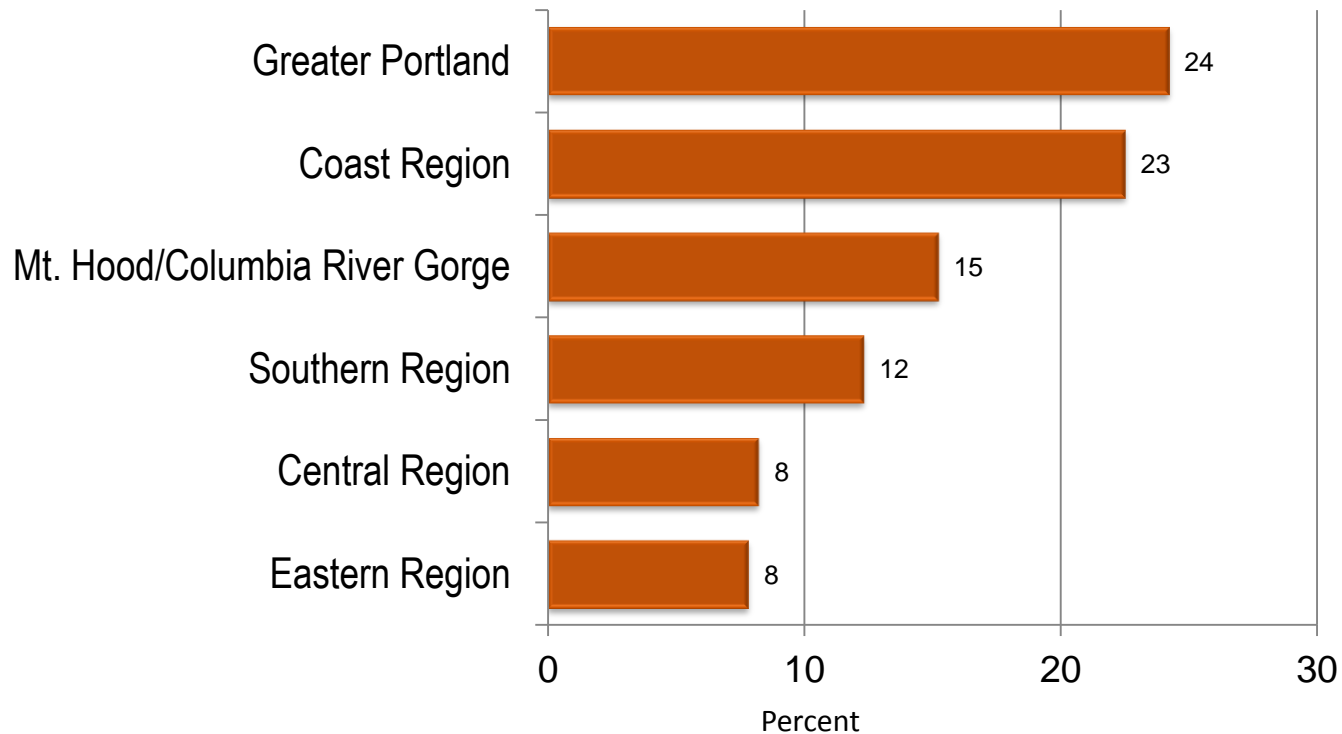
Base: Overnight Marketable Trips



# Other Oregon Regions Visited on Willamette Valley Trip



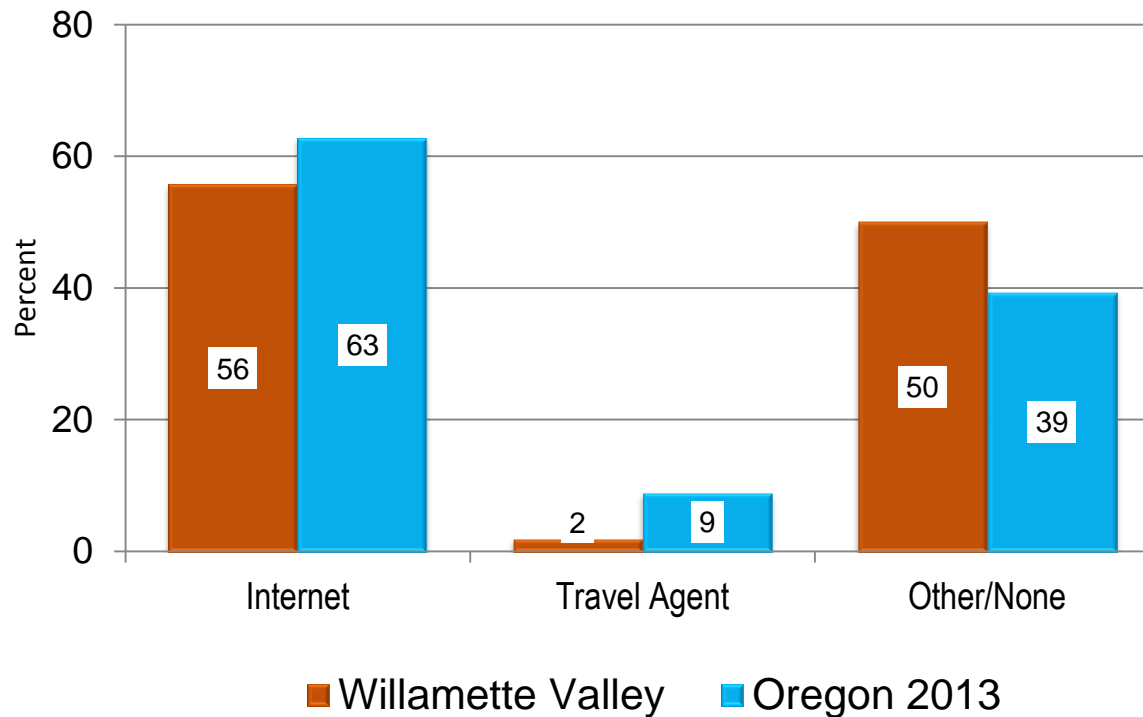
Base: Overnight Marketable Trips



# Method of Planning Trip



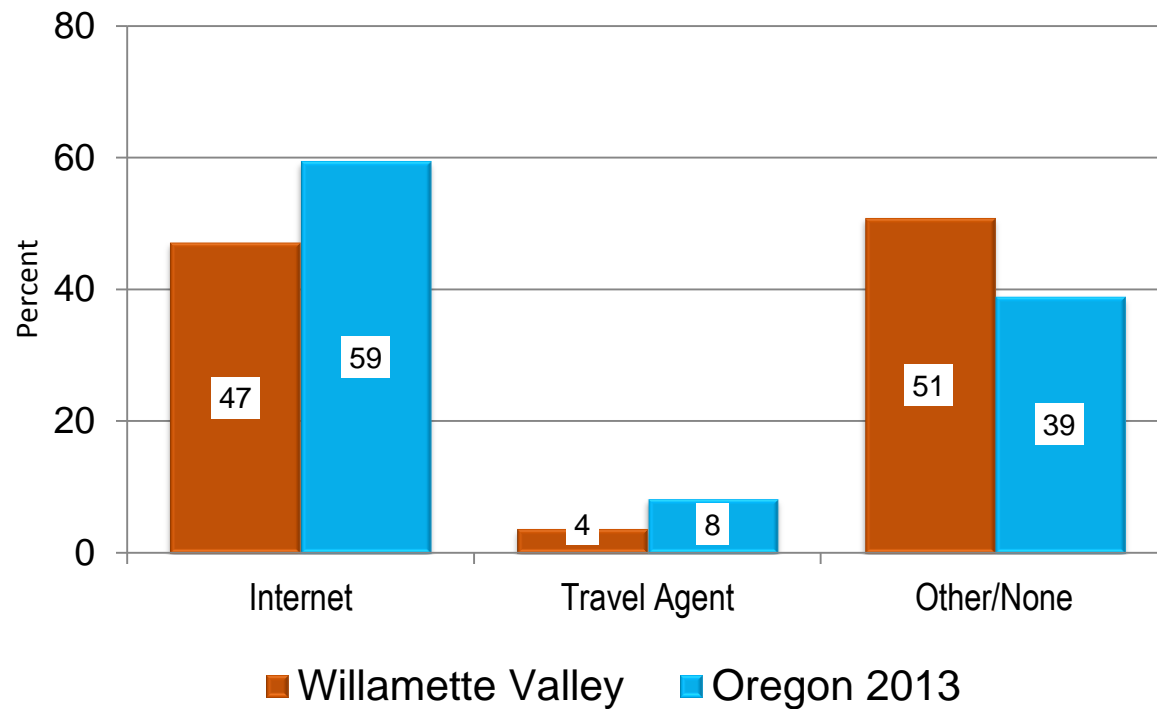
Base: Overnight Marketable Trips



# Method of Booking Trip



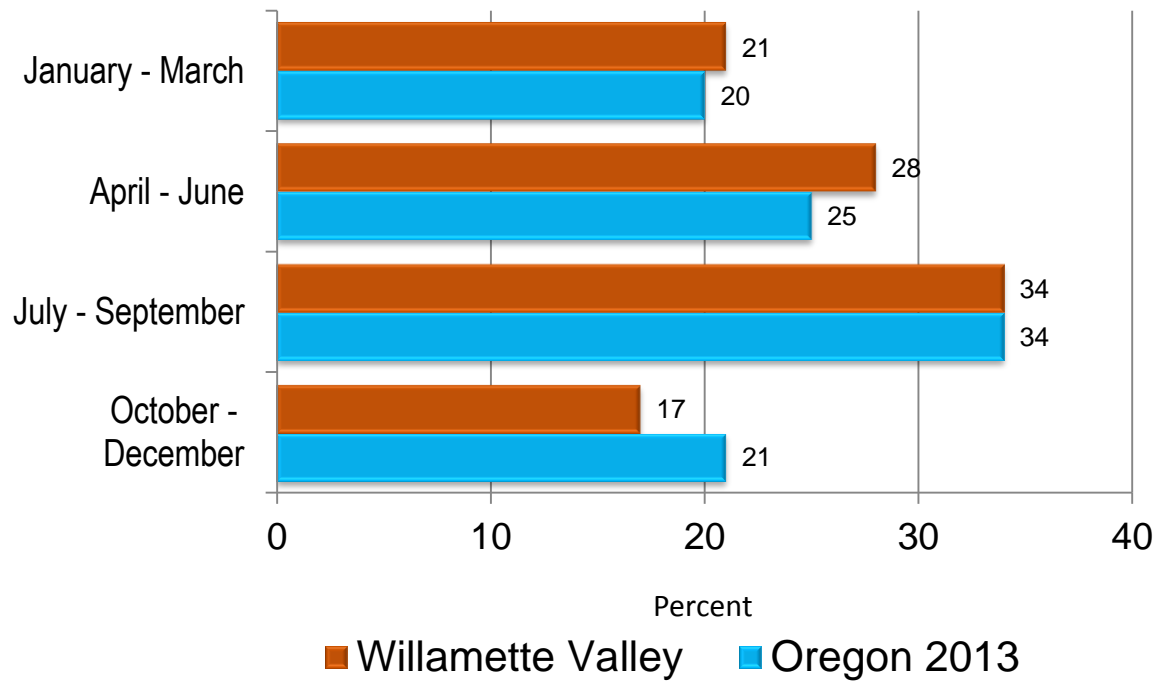
Base: Overnight Marketable Trips



# Season of Trip



Base: Overnight Marketable Trips



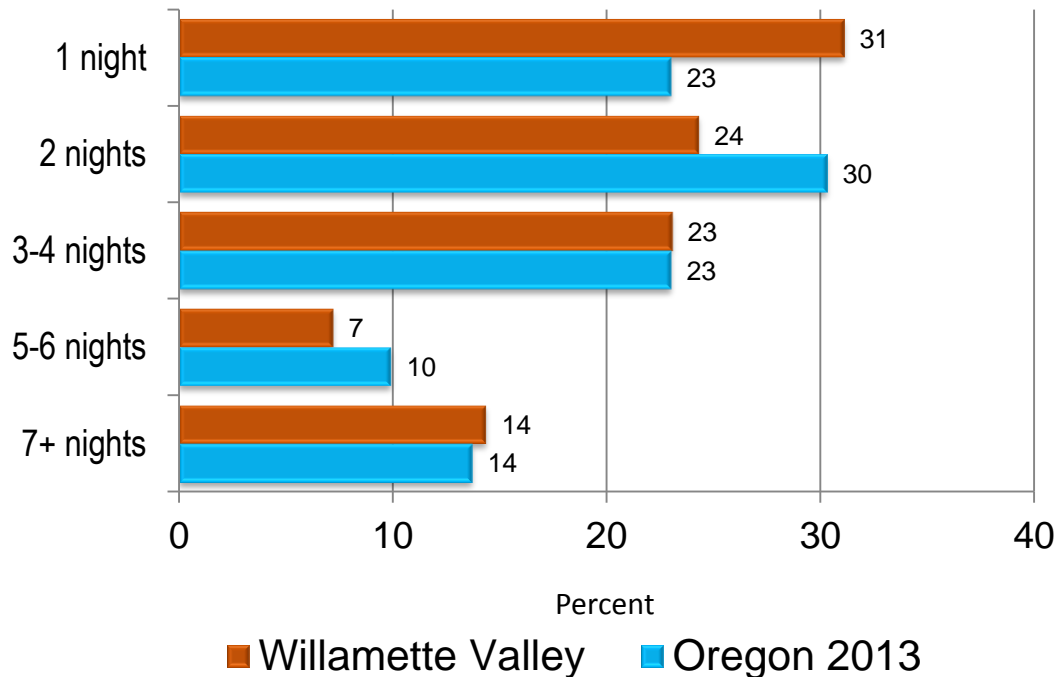
# Total Nights Away on Trip



Base: Overnight Marketable Trips

**Average  
Willamette Valley  
= 3.7 Nights**

**Average  
Oregon  
= 3.9 Nights**

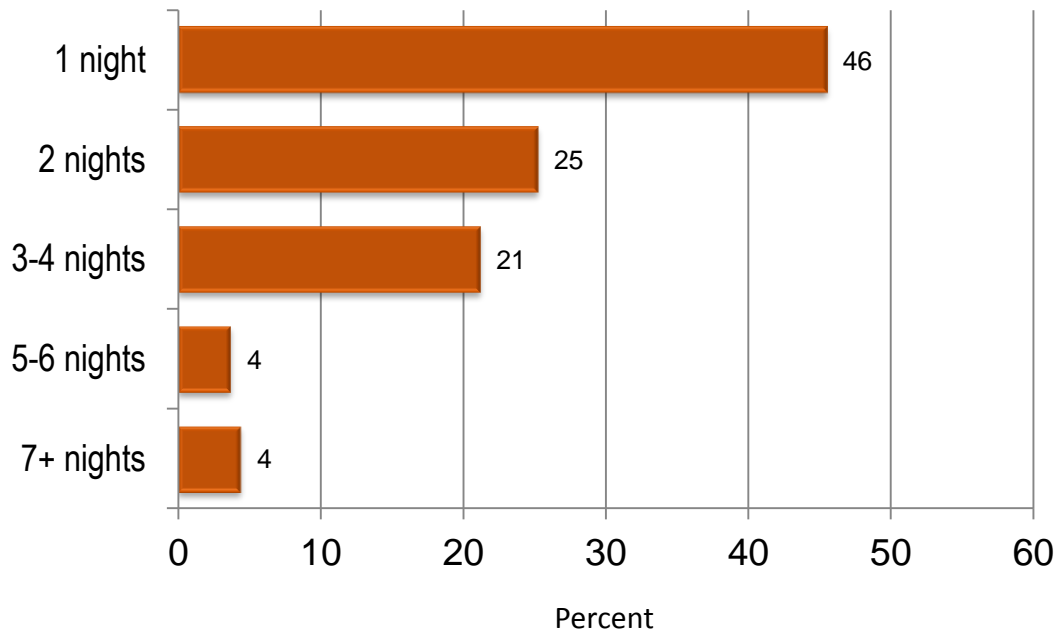


# Number of Nights Spent in Willamette Valley



Base: Overnight Marketable Trips with 1+ Nights Spent in Willamette Valley

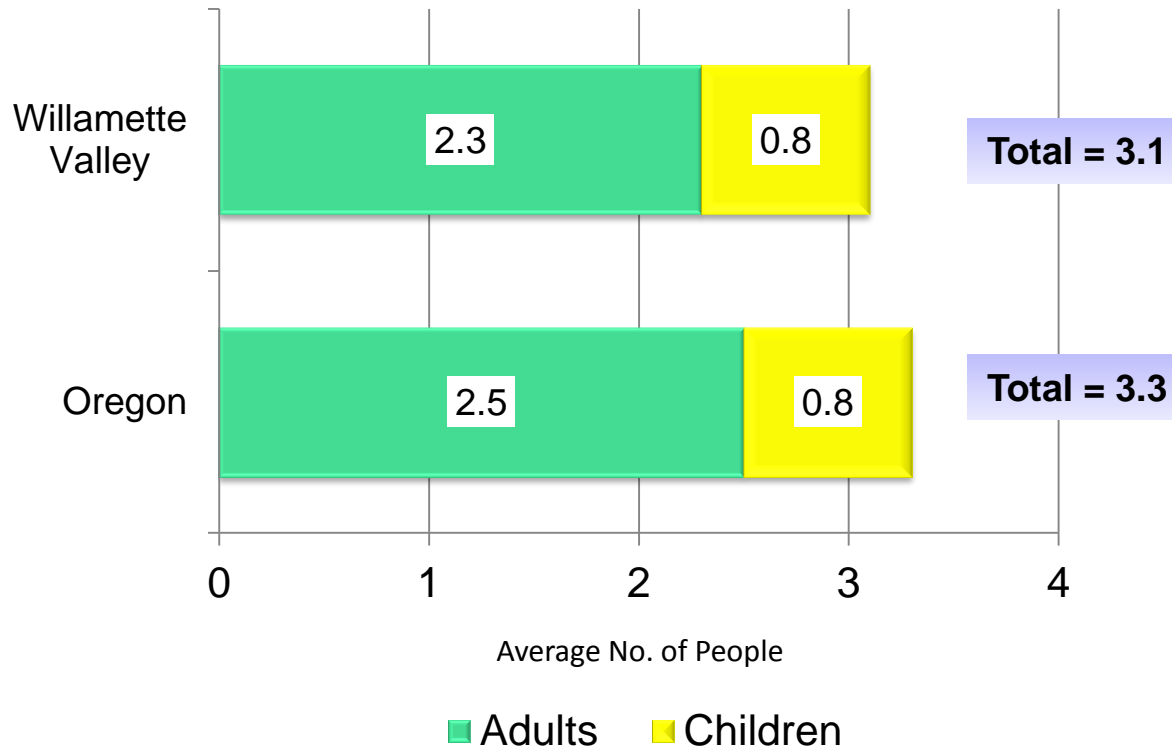
**Average Nights Spent in Willamette Valley = 2.4**



# Size of Travel Party



Base: Overnight Marketable Trips

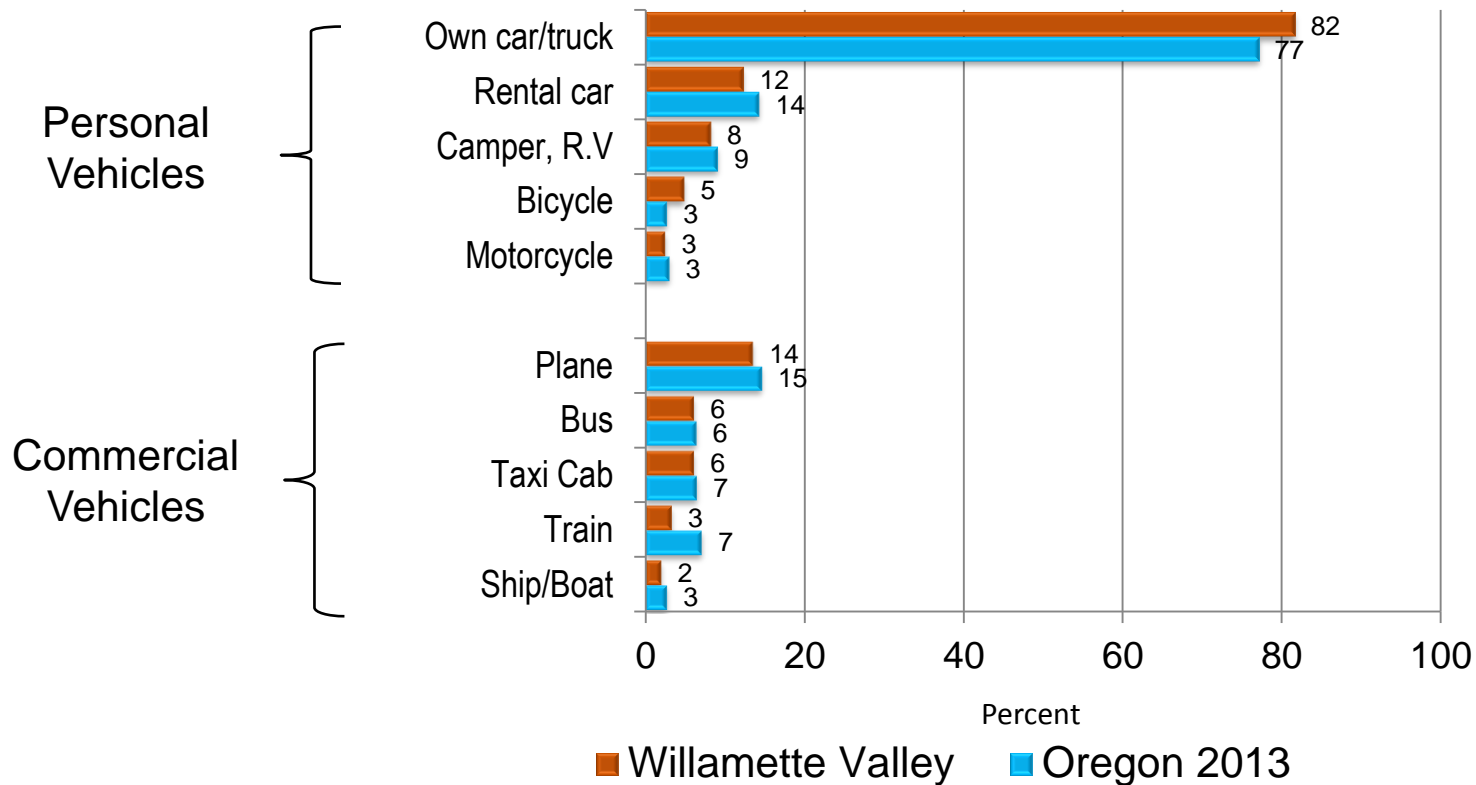




# Transportation



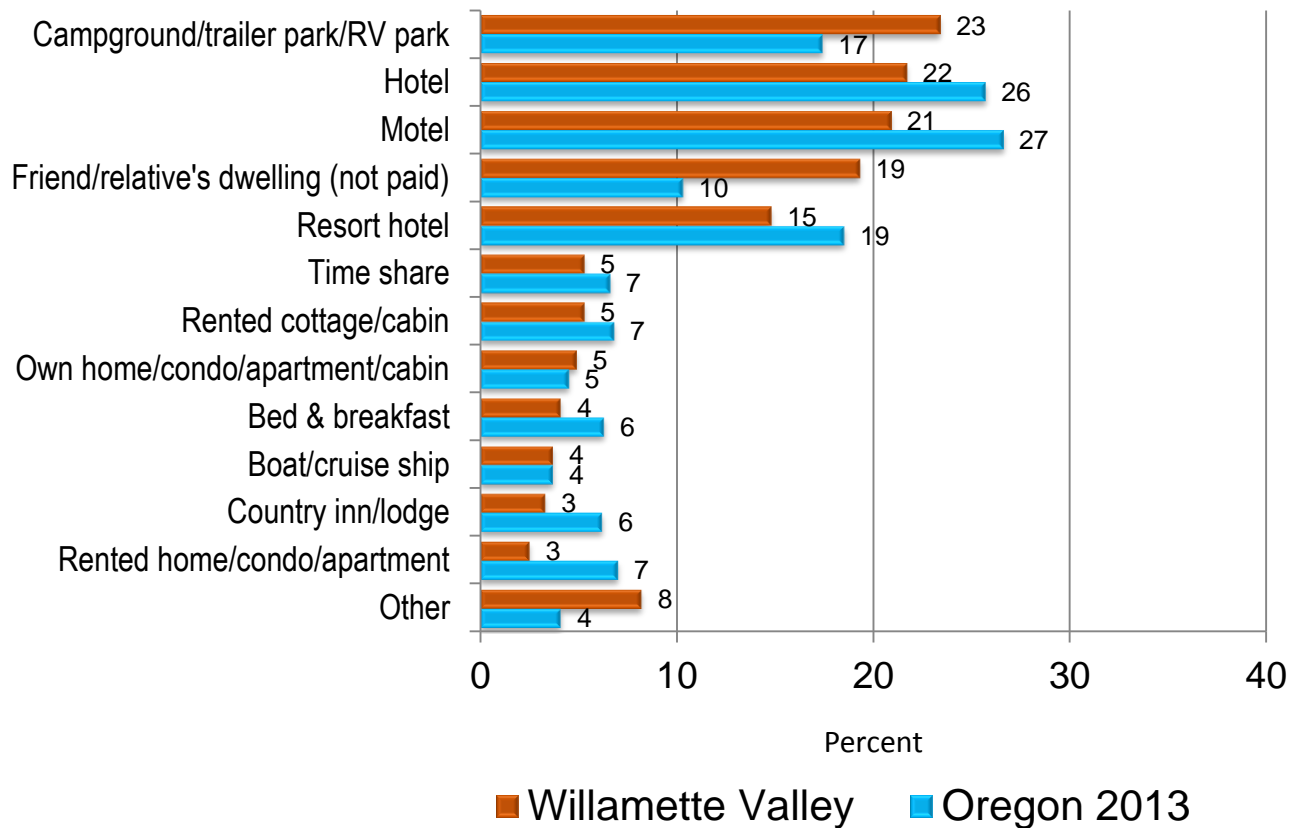
Base: Overnight Marketable Trips



# Accommodation



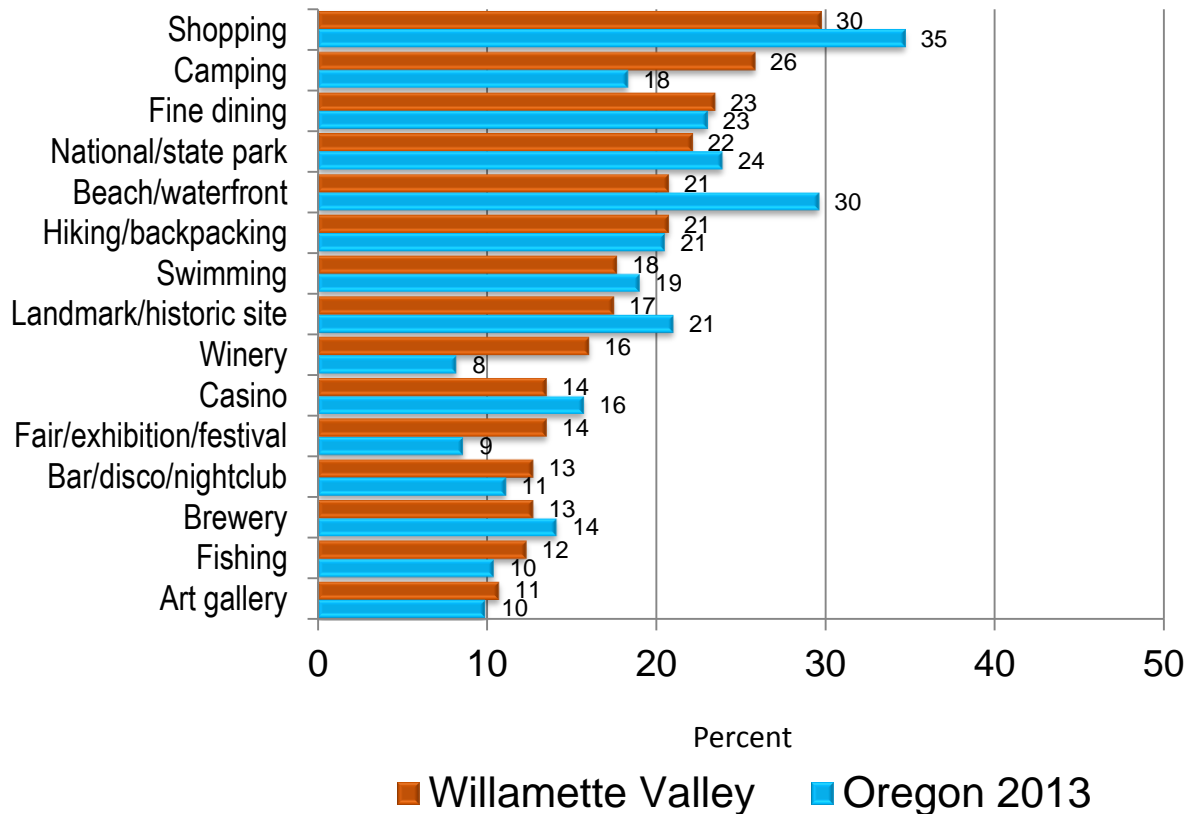
Base: Overnight Marketable Trips



# Activities and Experiences



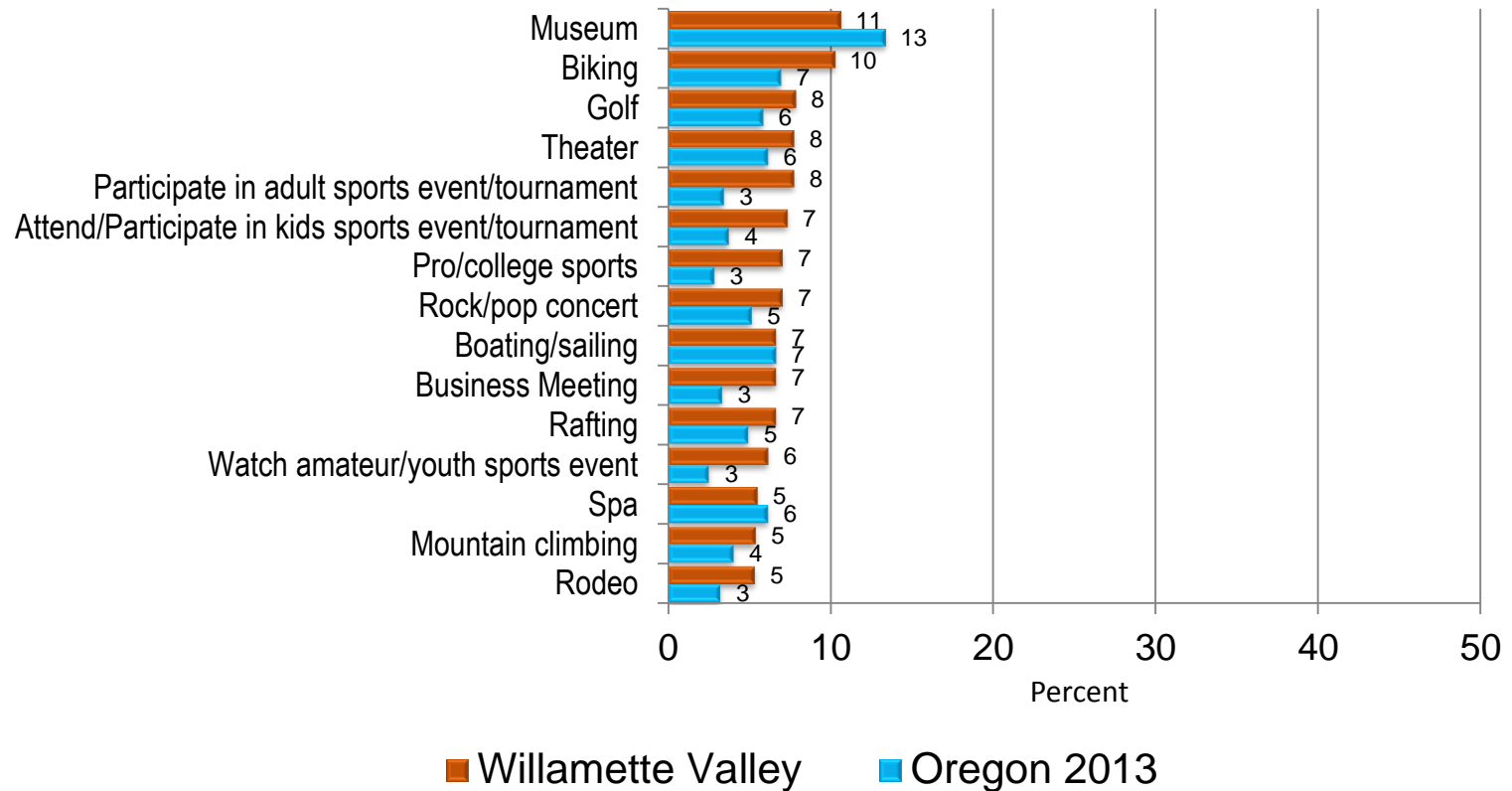
Base: Overnight Marketable Trips



# Activities and Experiences (Cont'd)



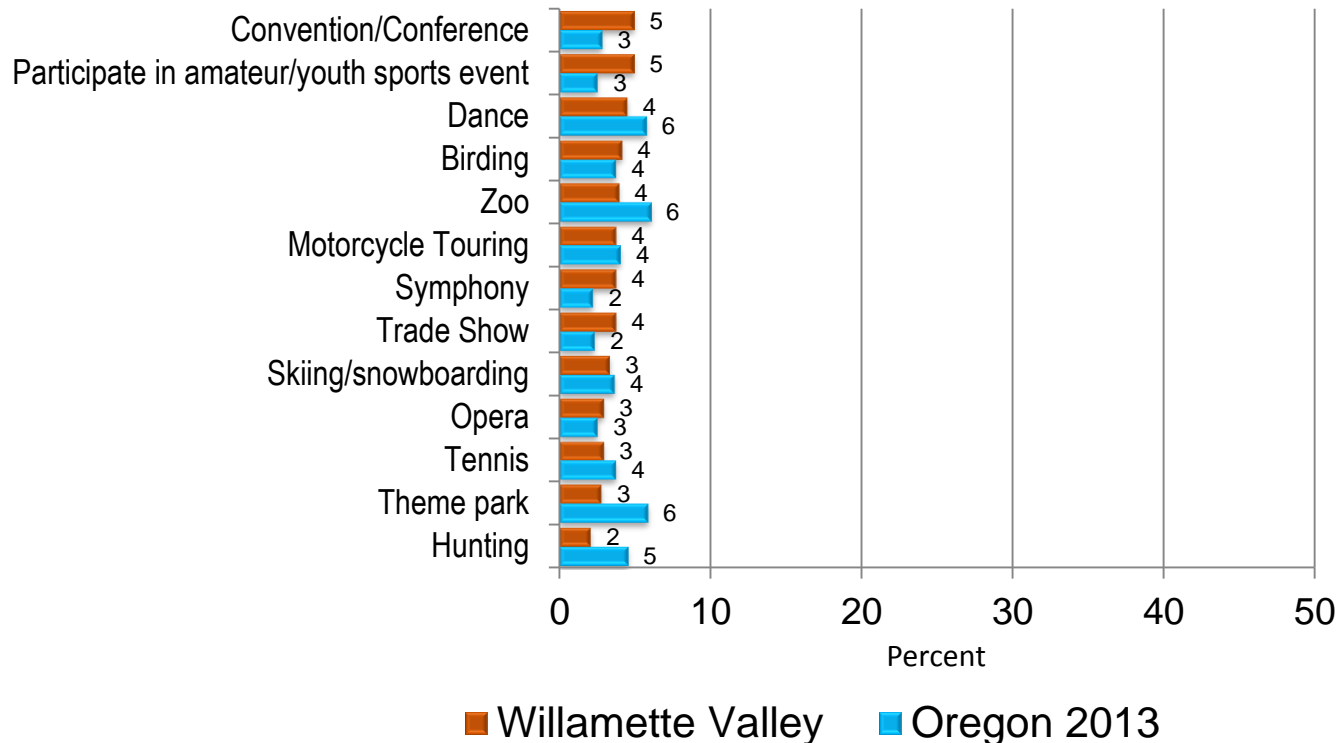
Base: Overnight Marketable Trips



# Activities and Experiences (Cont'd)



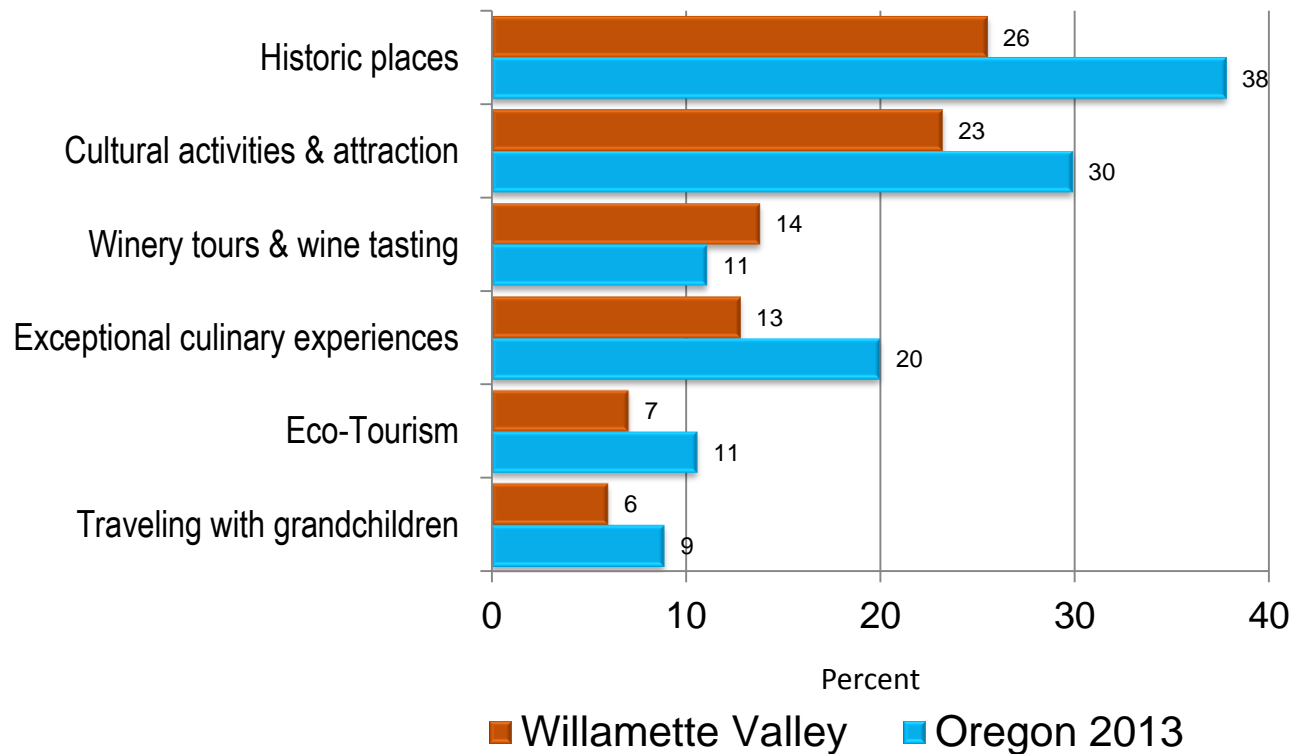
Base: Overnight Marketable Trips



# Activities of Special Interest



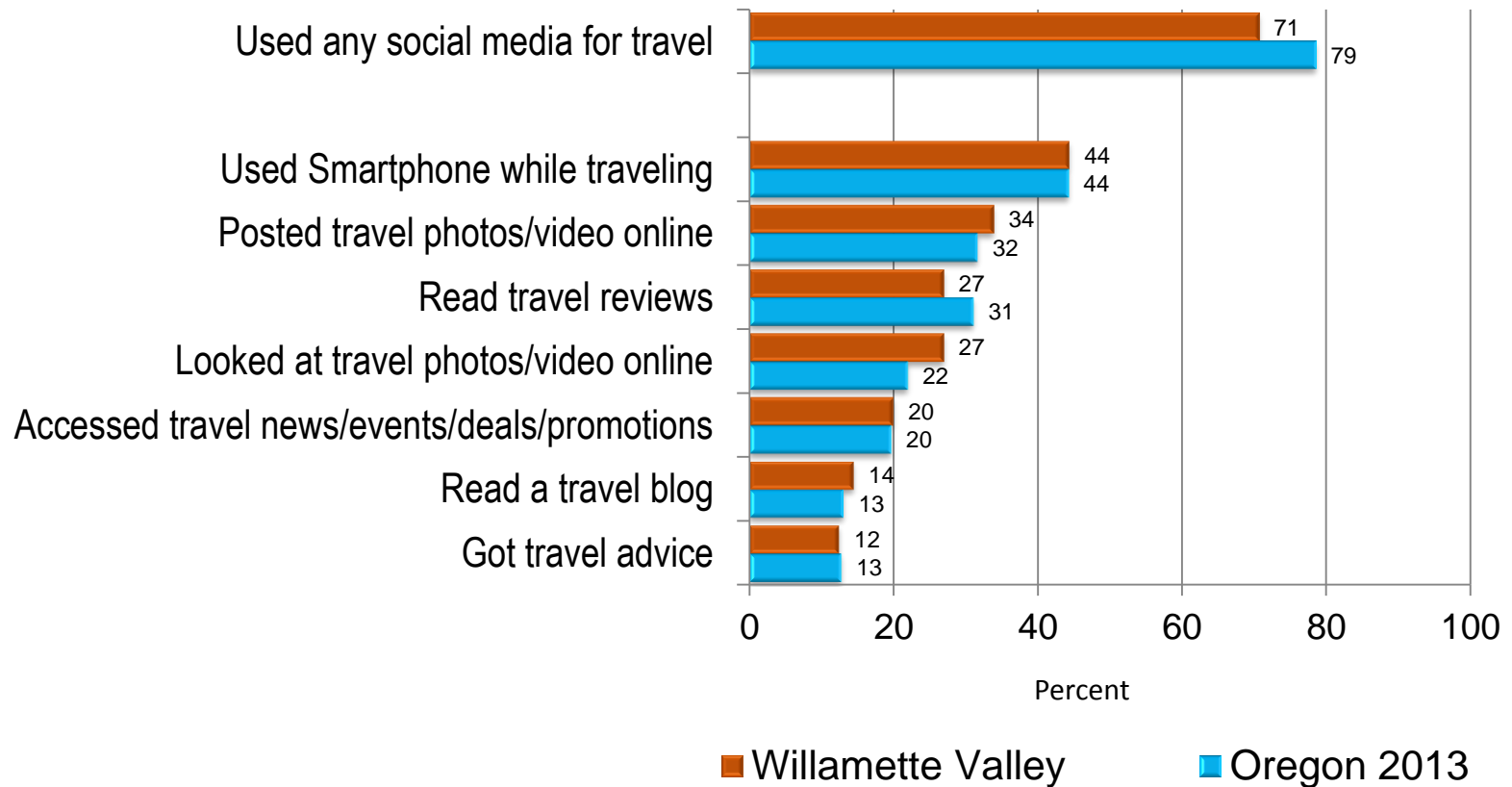
Base: Overnight Marketable Trips



# Online Social Media Use by Travelers



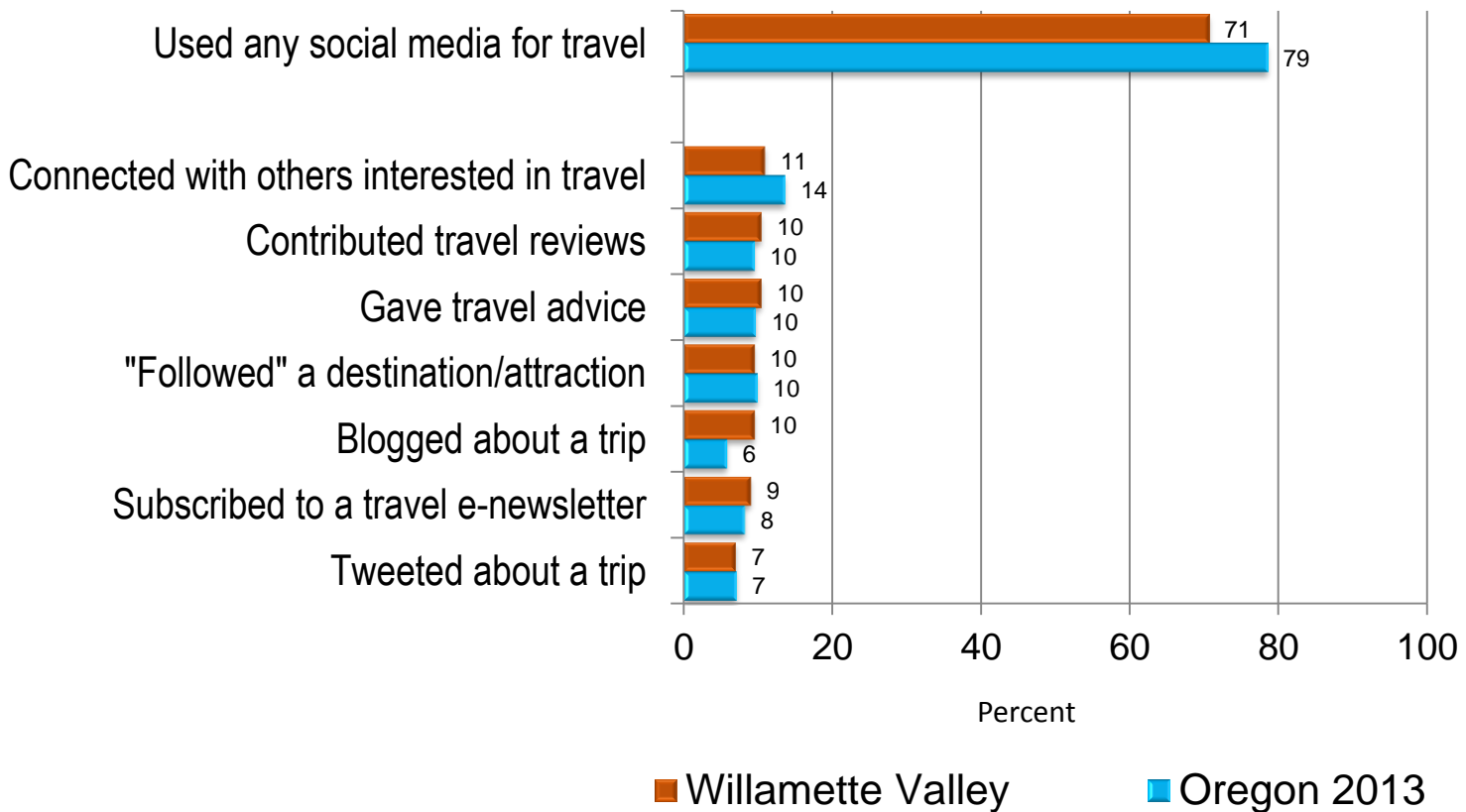
Base: Overnight Marketable Trips



# Online Social Media Use by Travelers (Cont'd)



Base: Overnight Marketable Trips

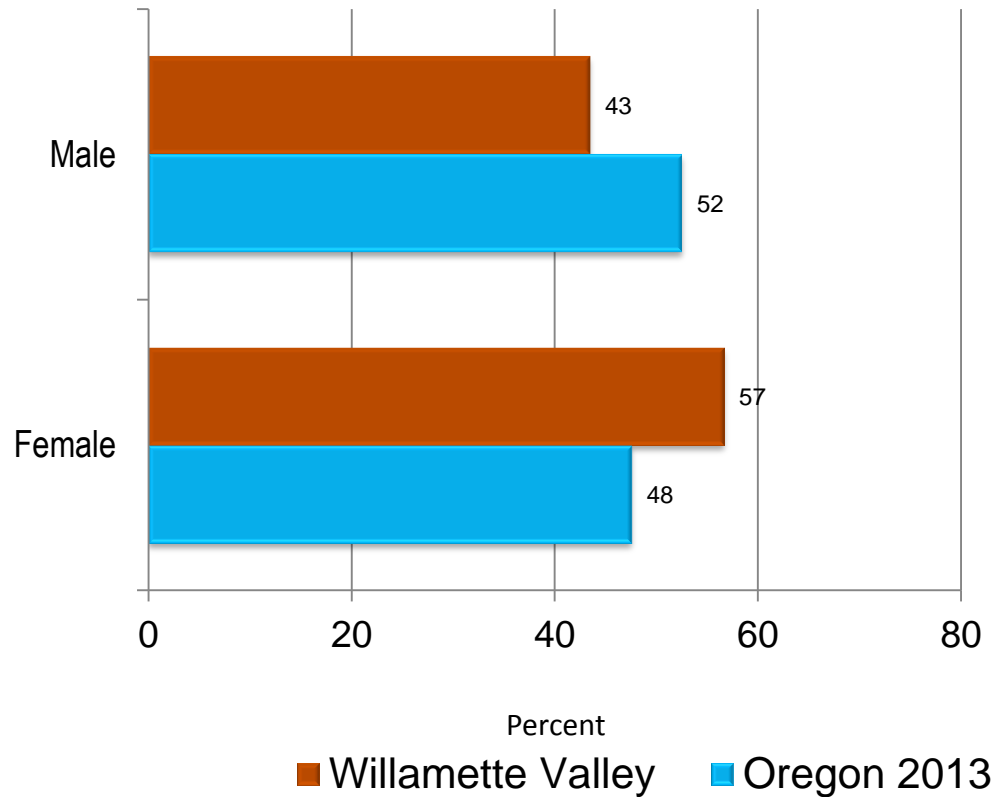




# Gender



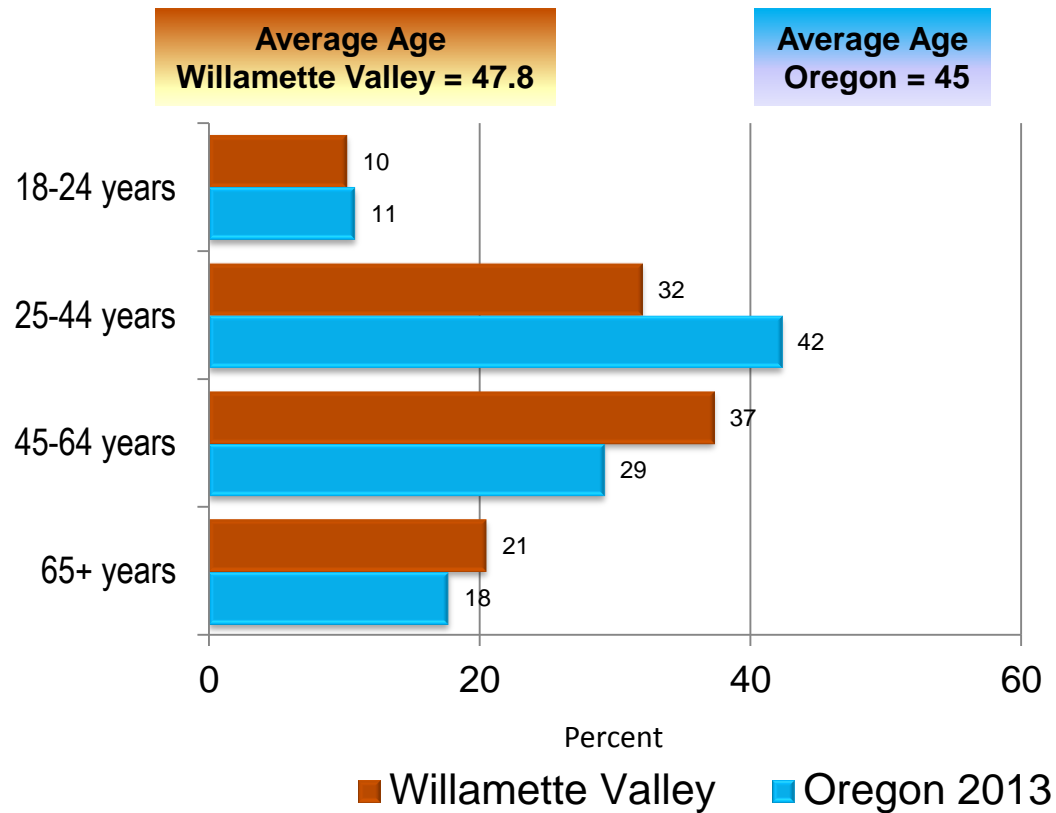
Base: Overnight Marketable Trips



# Age



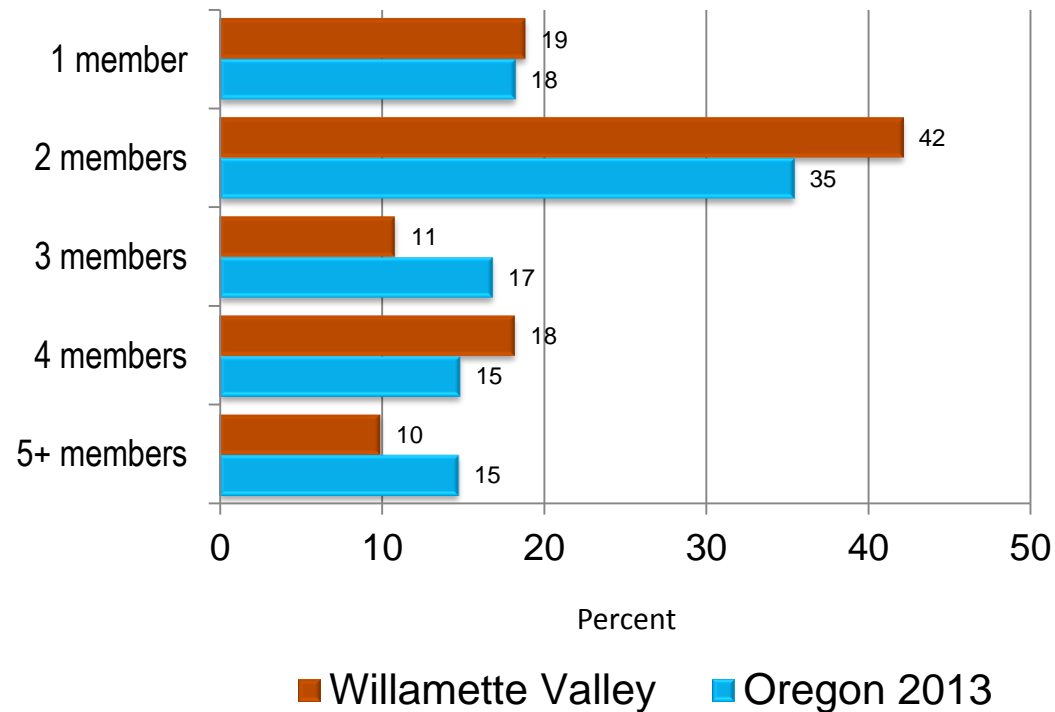
Base: Overnight Marketable Trips



# Household Size



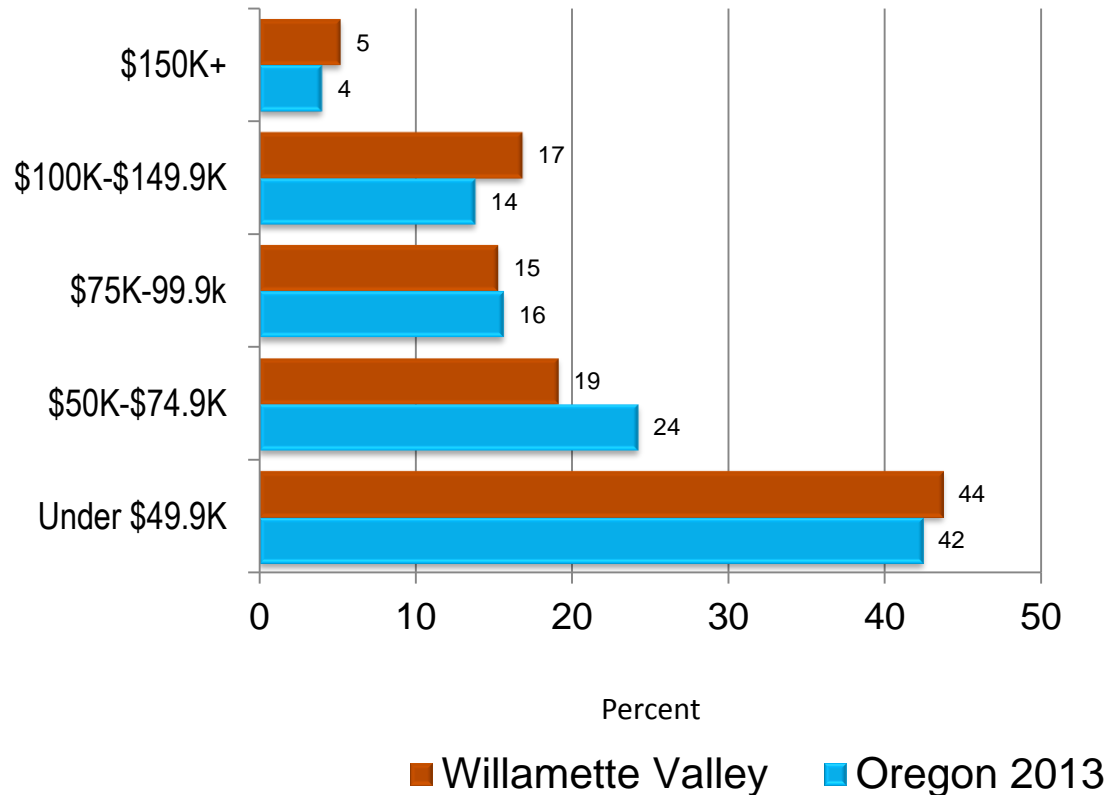
Base: Overnight Marketable Trips



# Household Income



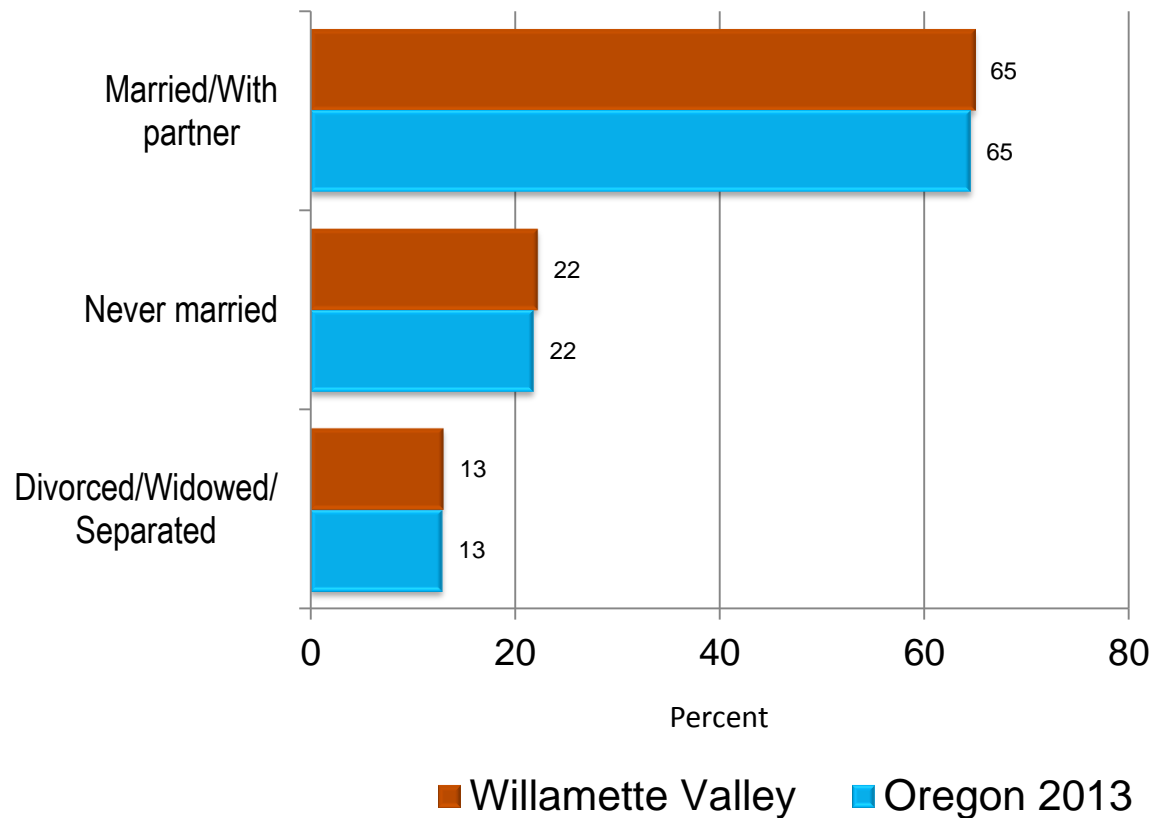
Base: Overnight Marketable Trips



# Marital Status



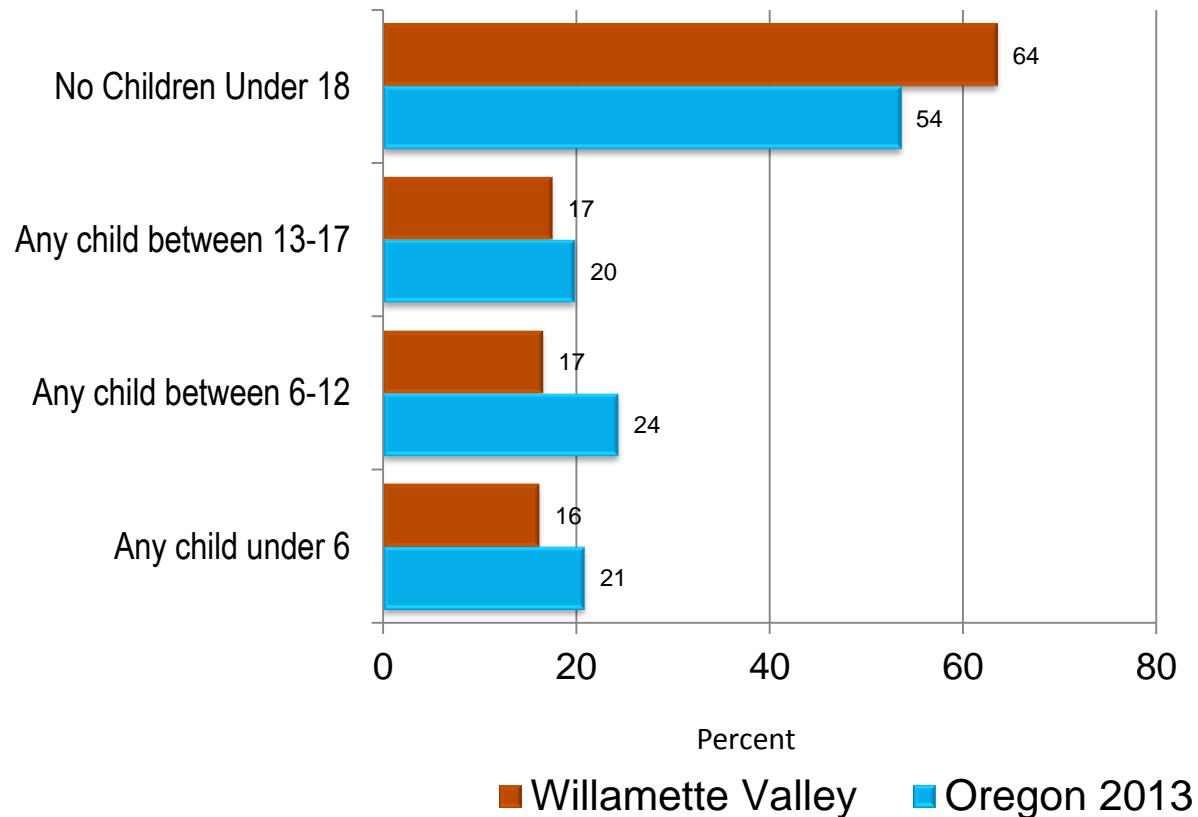
Base: Overnight Marketable Trips



# Children in Household



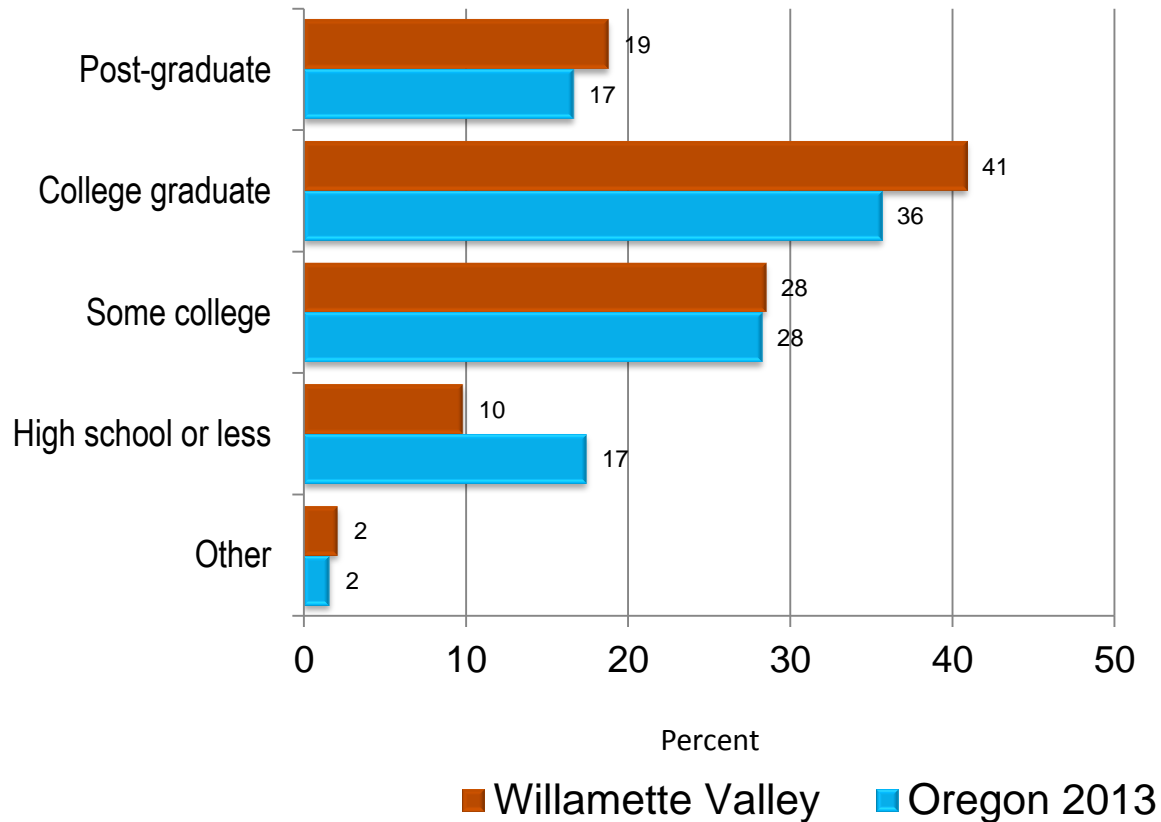
Base: Overnight Marketable Trips



# Education



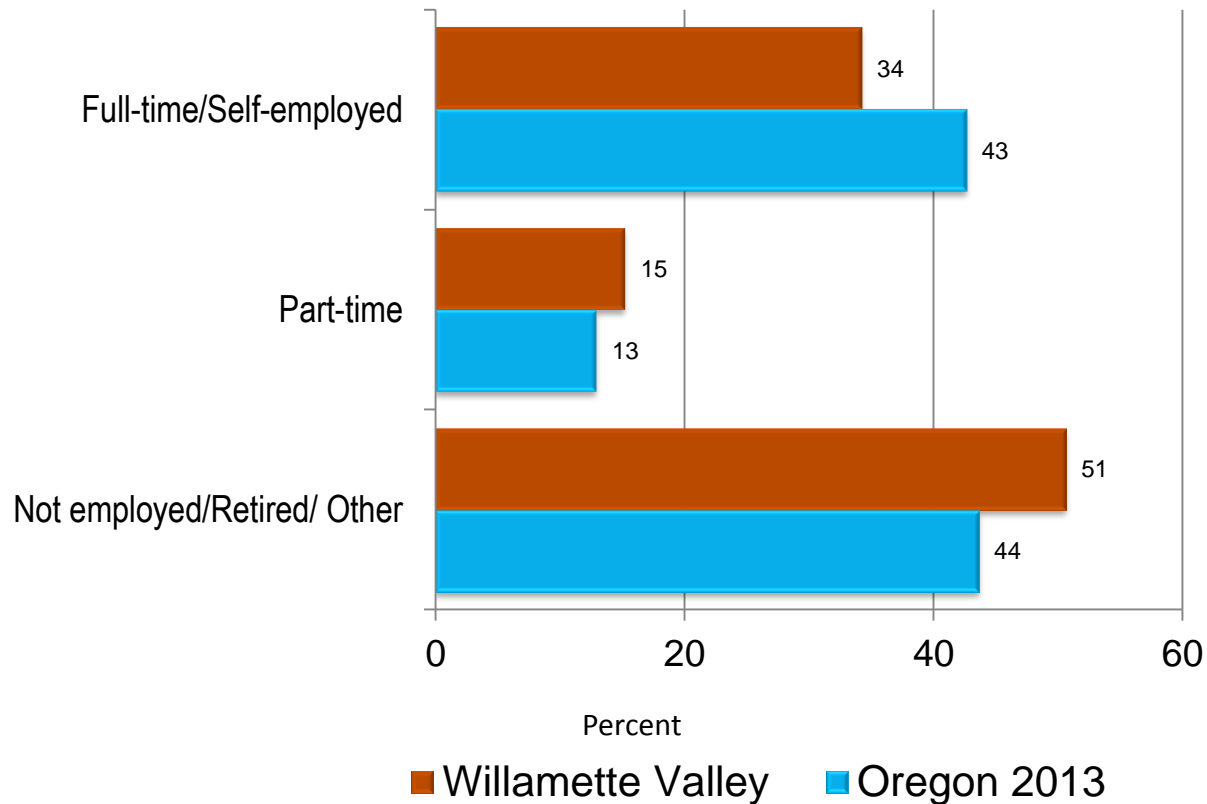
Base: Overnight Marketable Trips



# Employment



Base: Overnight Marketable Trips

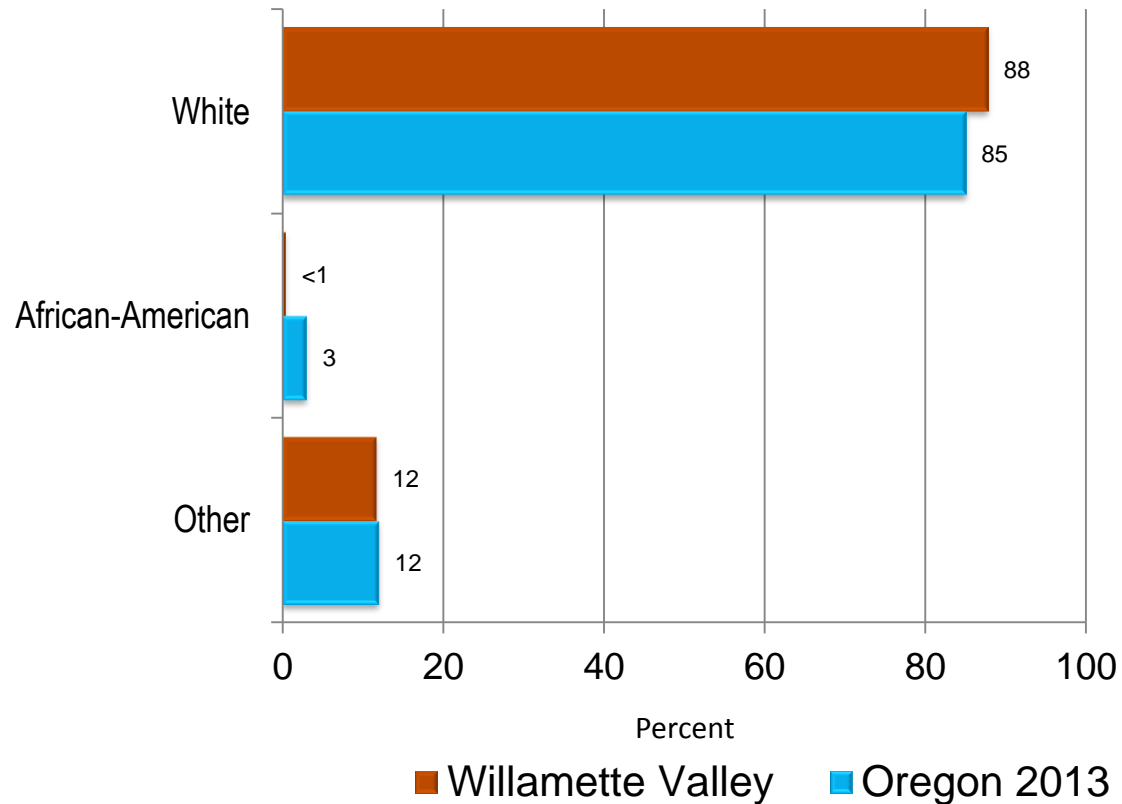




# Race



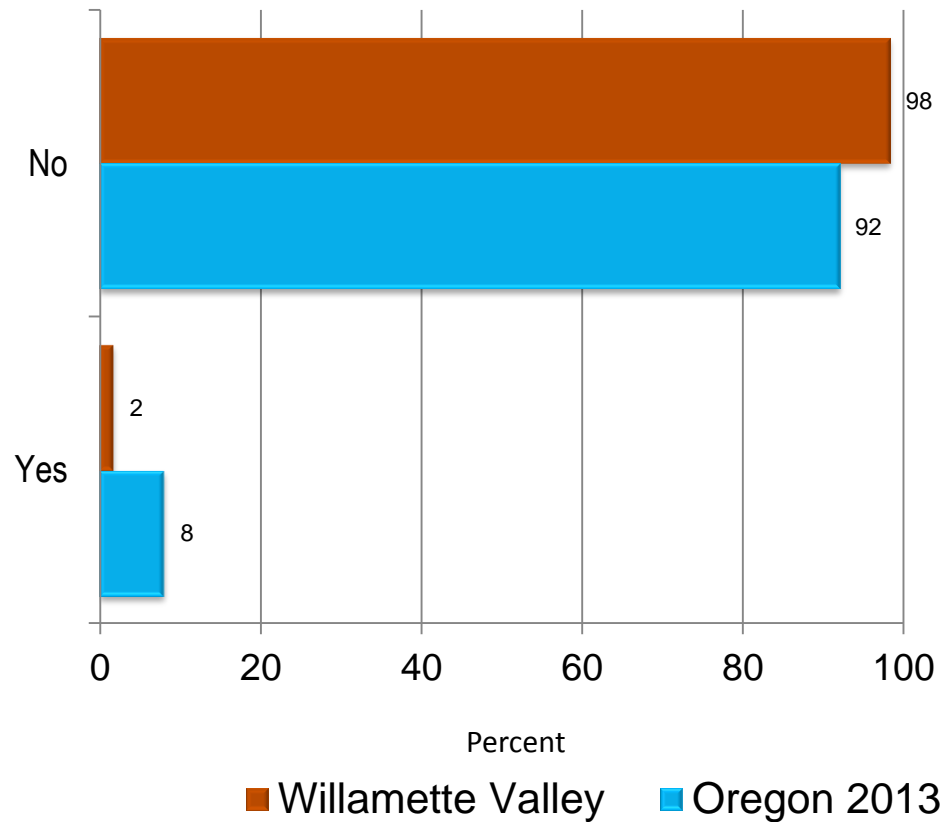
Base: Overnight Marketable Trips



# 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