



Oregon

2013 Visitor 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, 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 of Oregon's domestic tourism business in 2013.

Methodology



- Each quarter, a random cross-section of online sample is sent an e-mail invitation to participate in the survey. A reminder is e-mailed several days later to non-responders.
- For the 2013 travel year, this yielded:
 - 229,726 trips for analysis nationally:
 - 153,730 overnight trips
 - 75,996 day trips
- For Oregon, the following sample was achieved in 2013:
 - 4,748 trips:
 - 2,995 overnight trips, of which 1,308 were *marketable trips*
 - 1,753 day trips, of which 1,013 were *marketable trips*
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.

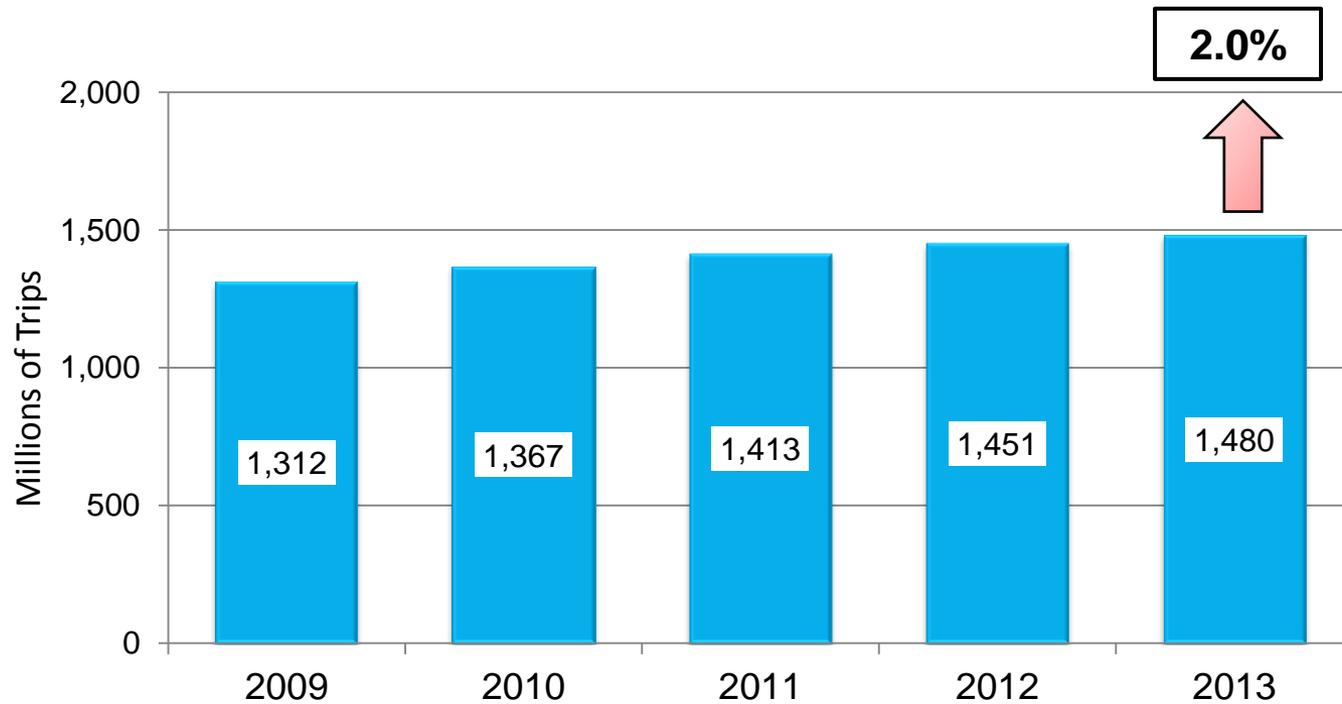


U.S. Travel Market Structure & Trends

Total Size of the U.S. Travel Market — 2009-2013



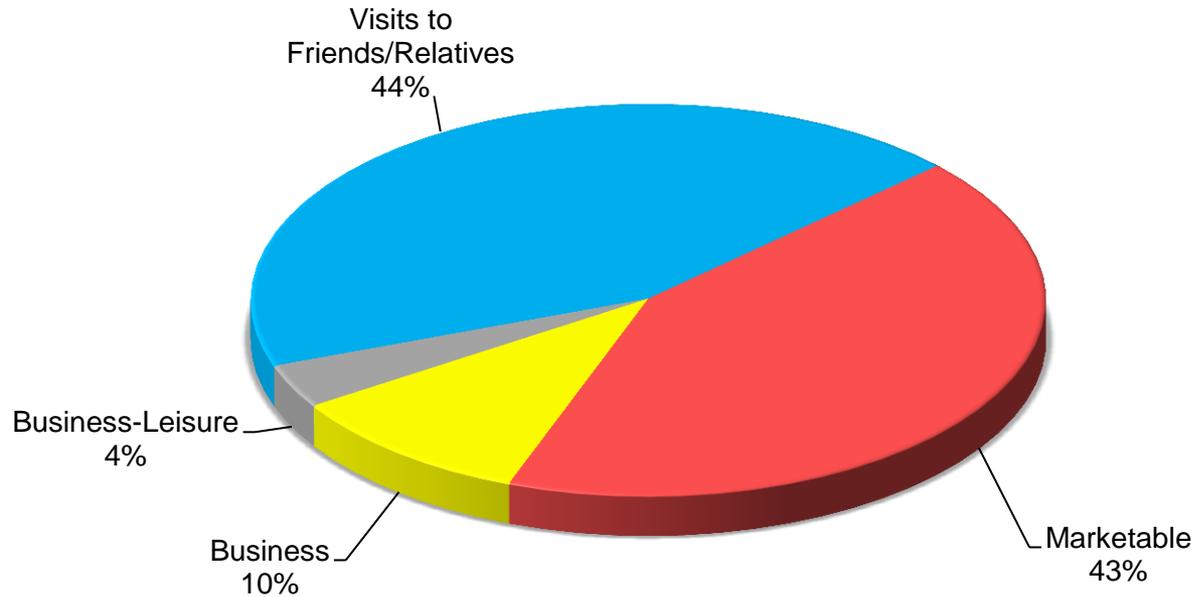
Base: Total Overnight Trips



Structure of the U.S. Travel Market — 2013 Overnight Trips



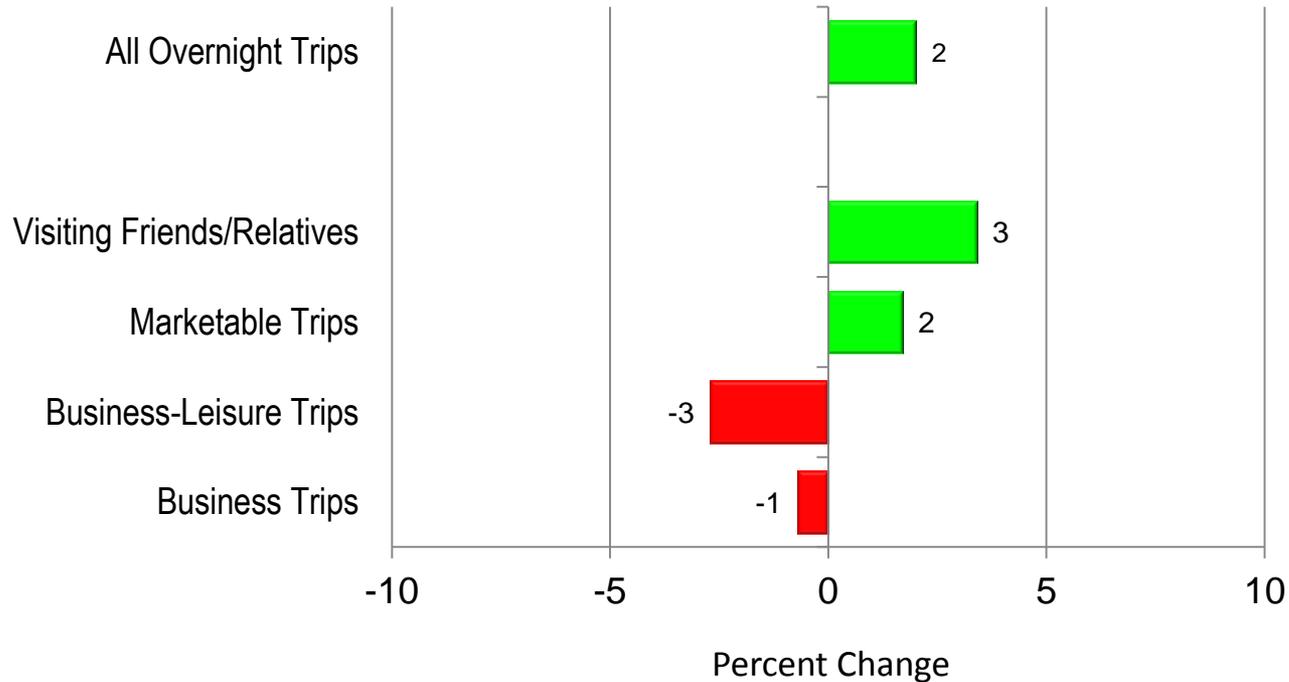
Base: Adult Overnight Trips



U.S. Market Trends for Overnight Trips — 2013 vs. 2012



Base: Total Overnight Trips





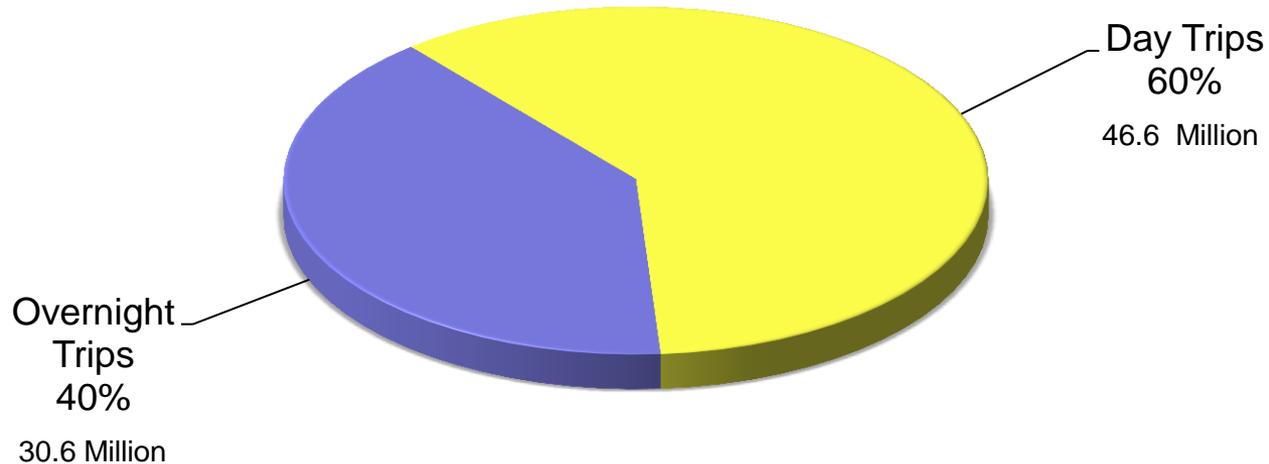
Oregon Travel Market

Size & Structure

Total Size of Oregon's Travel Market



Total Person-Trips* = 77.2 Million

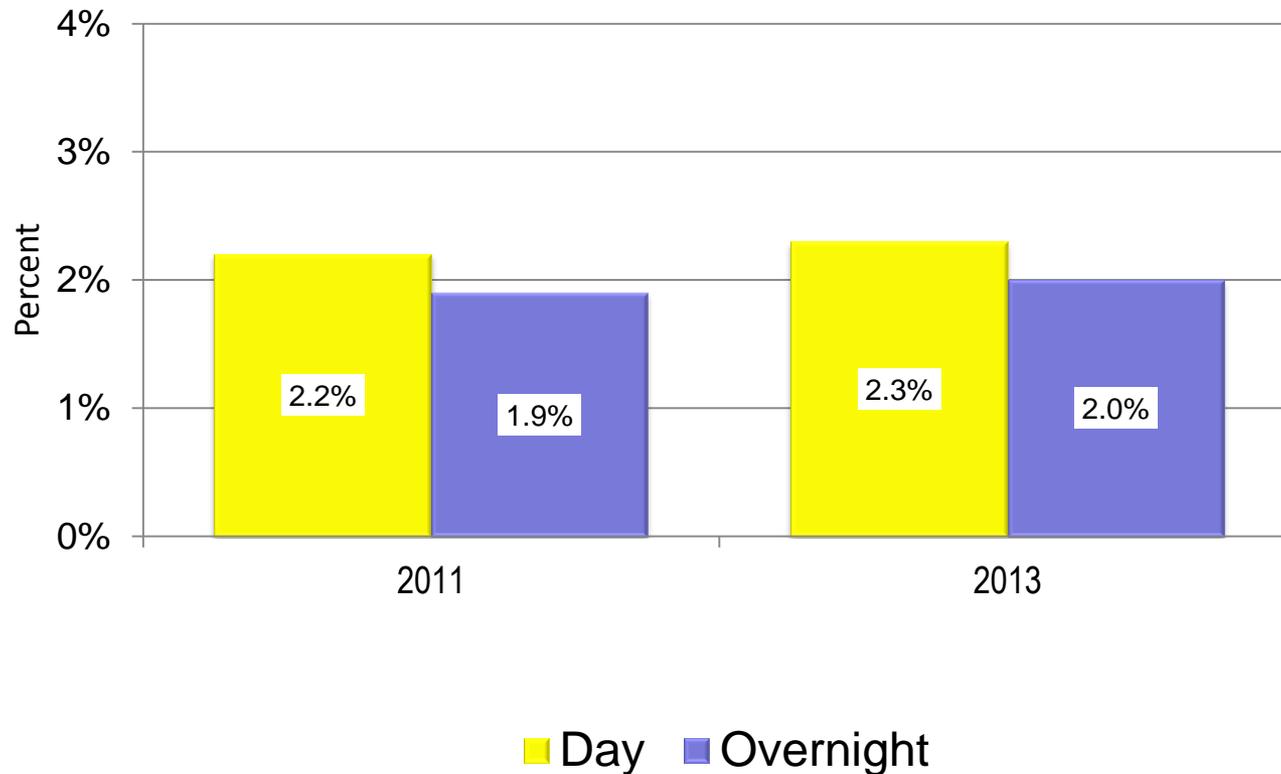


*Total volume includes both adults and children

Oregon's Share of Adult Domestic Trips



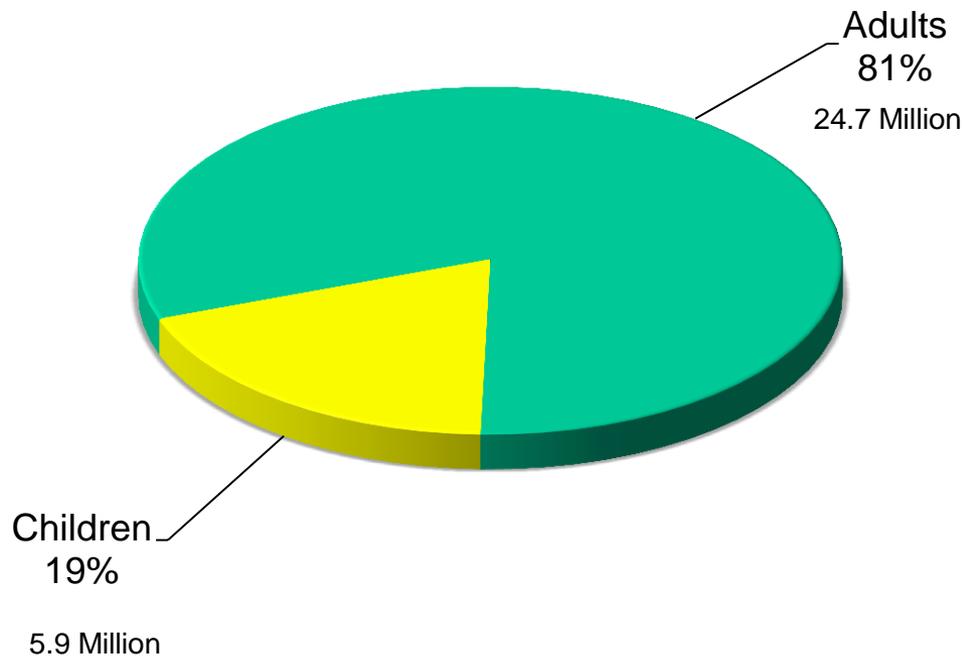
Base: Adult Person-Trips



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



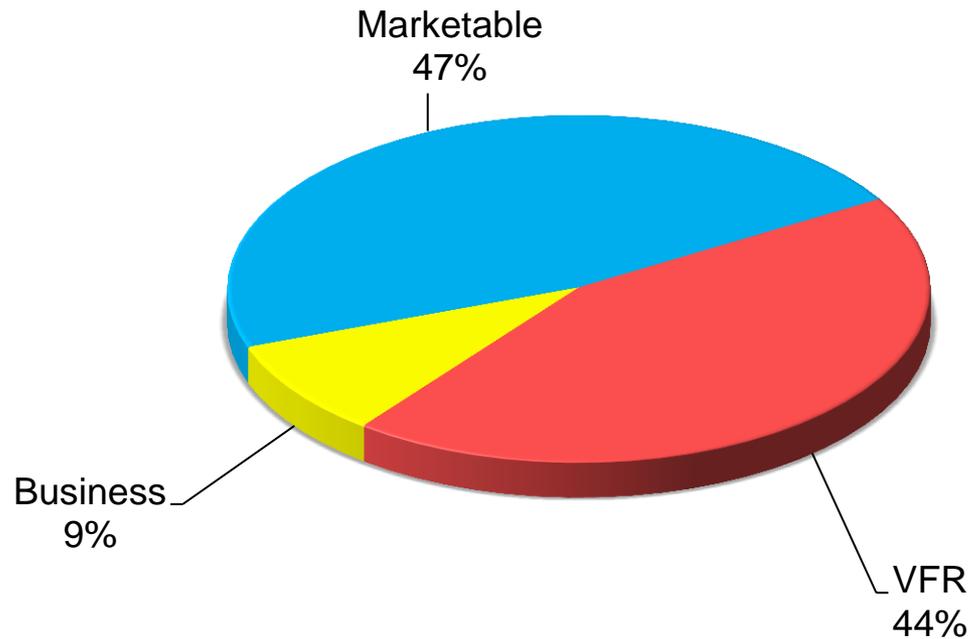
Total Overnight Person-Trips = 30.6 Million



Oregon's Overnight Travel Market — by Trip Purpose



Base: Adult Overnight Person-Trips to Oregon

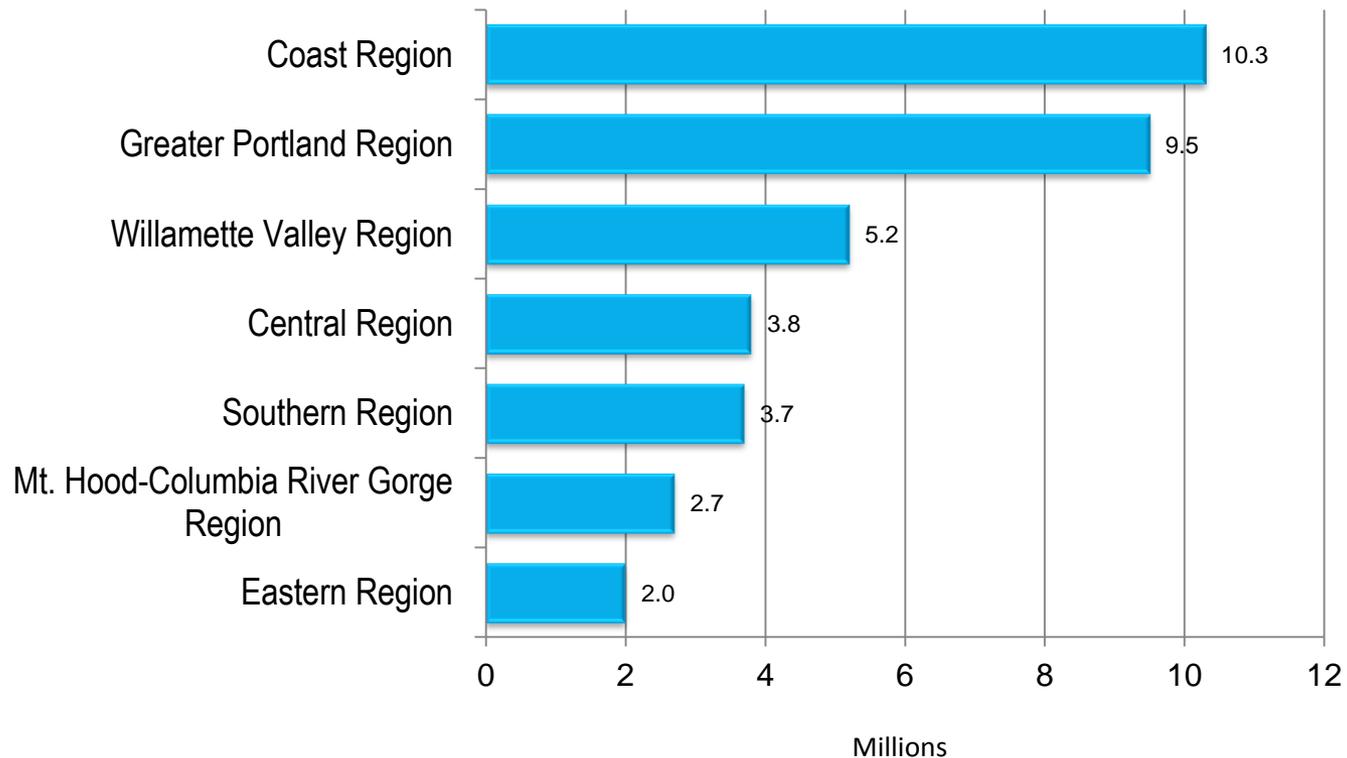


*Marketable includes Business-Leisure

Oregon Regional Overnight Travel Volume*



Base: Adult Overnight Person-Trips to Oregon

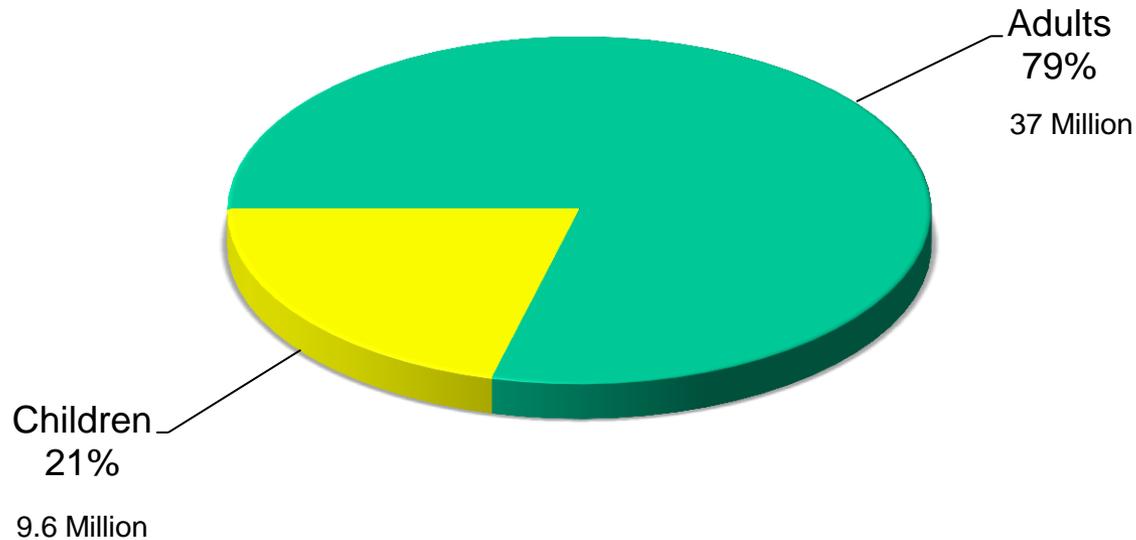


*Adds to more than total state overnight volume because people may visit more than one region on a trip

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



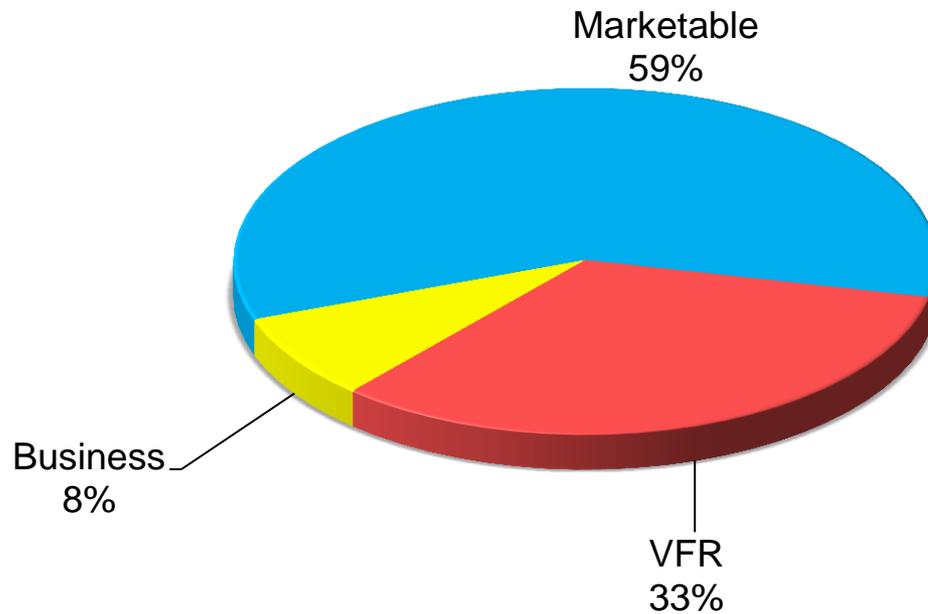
Total Day Person-Trips = 46.6 Million



Oregon's Day Travel Market — by Trip Purpose



Base: Adult Day Person-Trips to Oregon



*Marketable includes Business-Leisure



Overnight Trip Detail

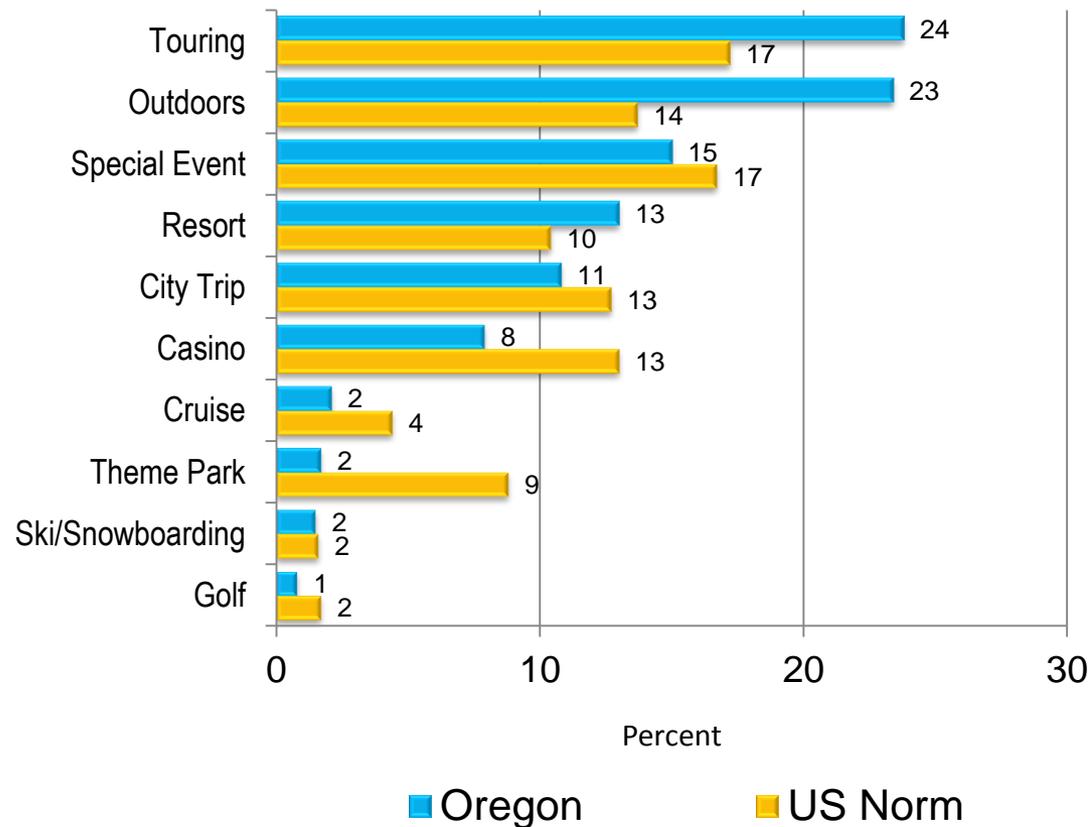


Overnight Trip Characteristics

Main Purpose of Marketable Trip – Oregon vs. National Norm



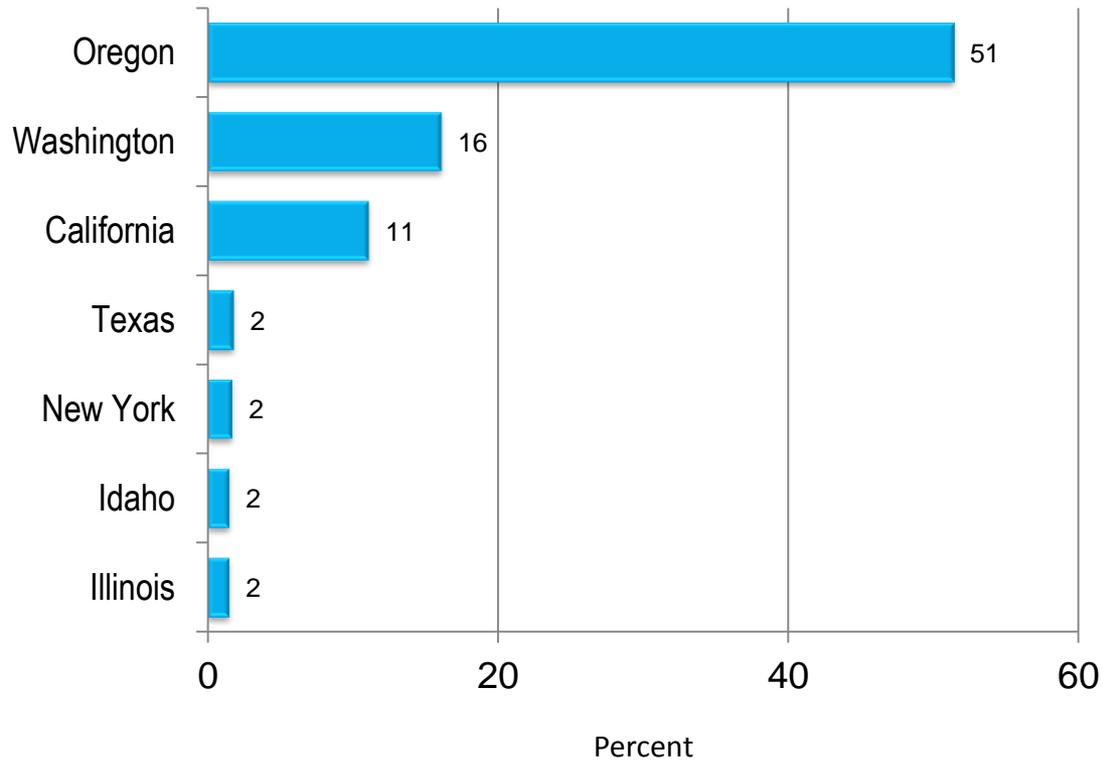
Base: Overnight Marketable Trips



State Origin Of Trip



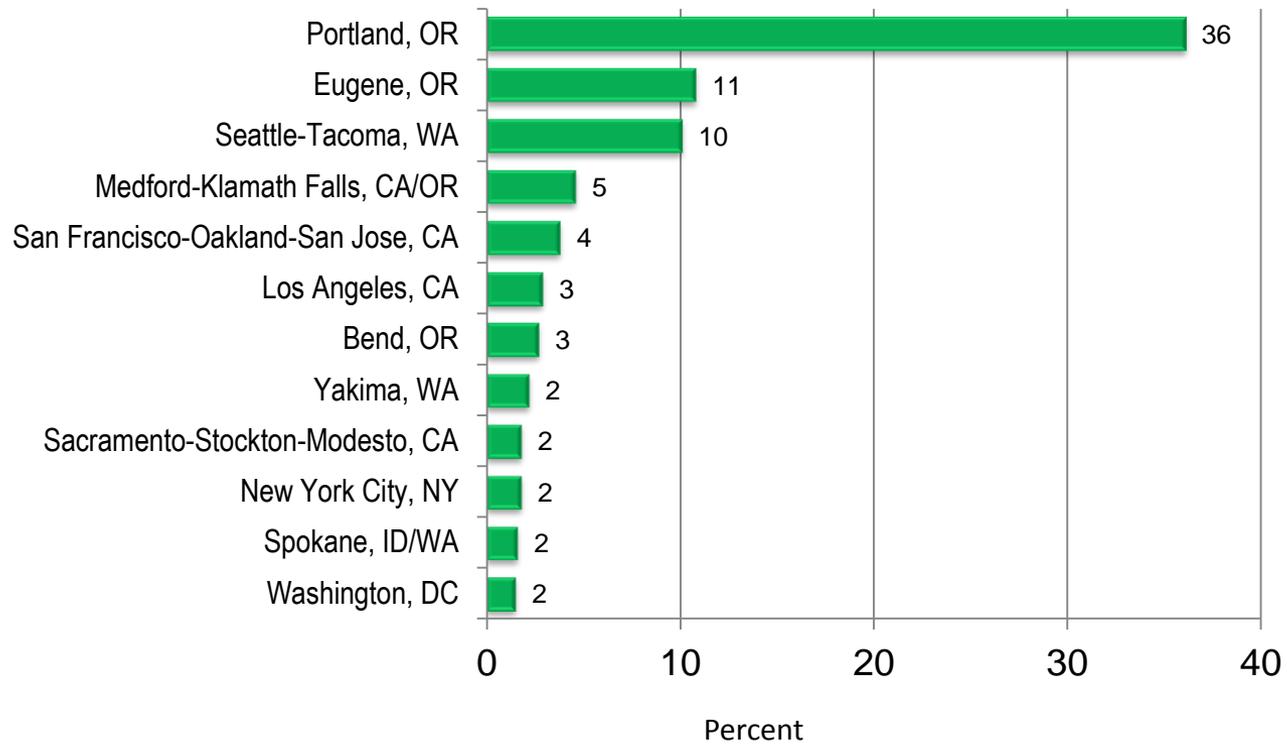
Base: Overnight Marketable Trips



DMA Origin Of Trip



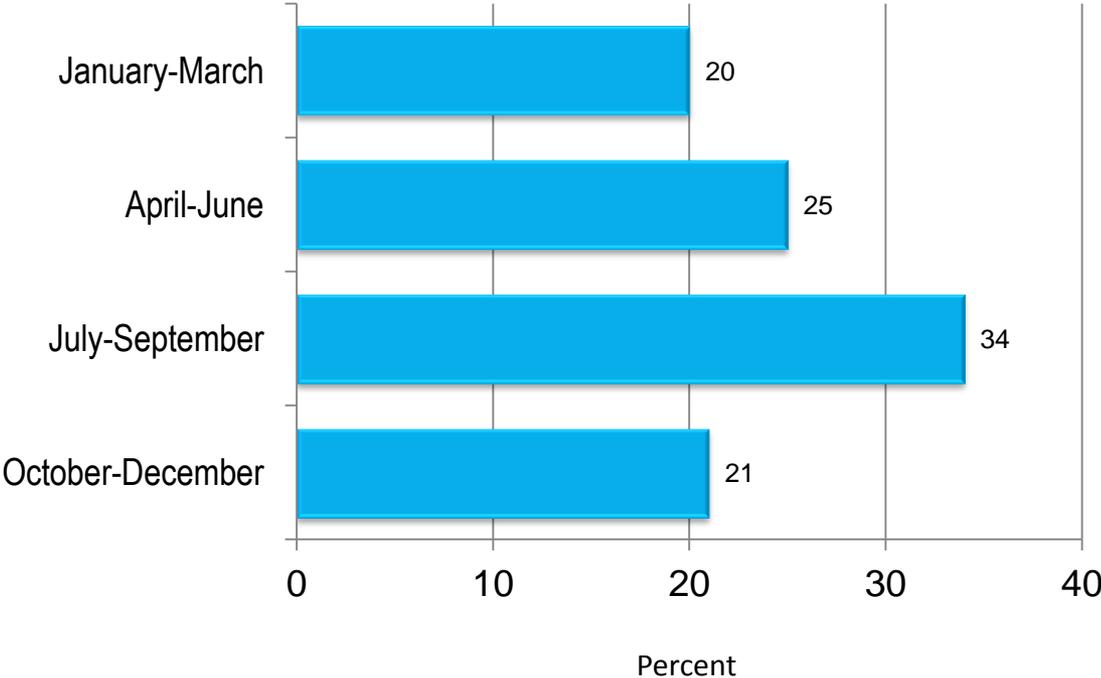
Base: Overnight Marketable Trips



Season of Trip



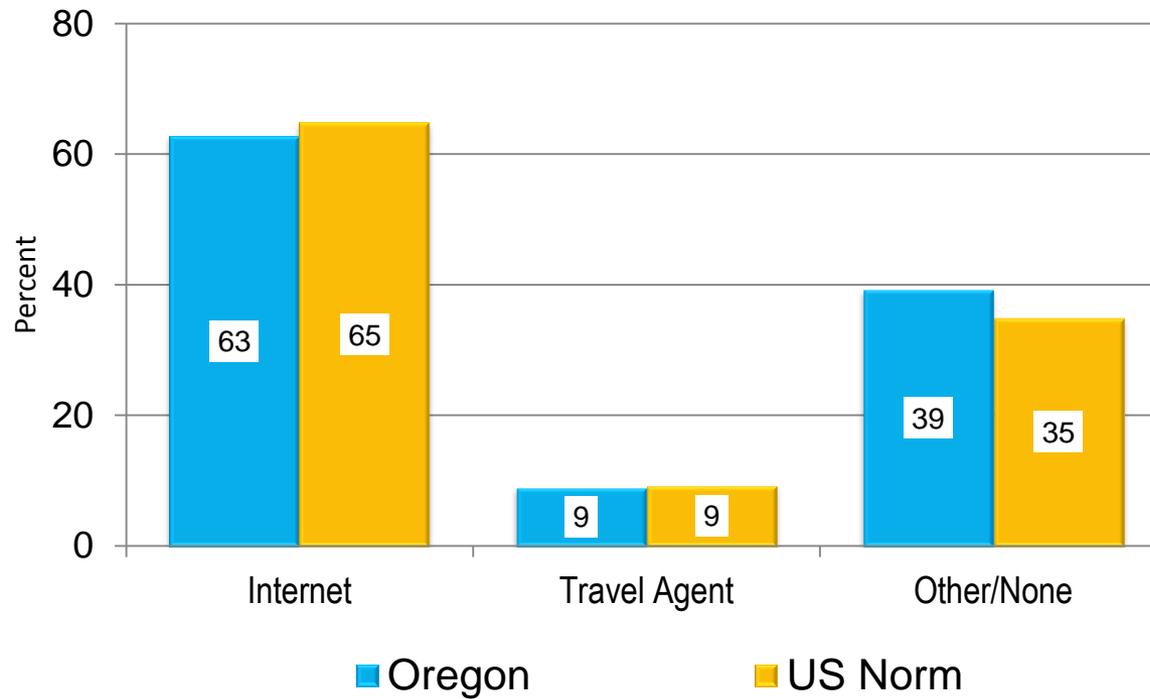
Base: Overnight Marketable Trips



Method of Planning Trip



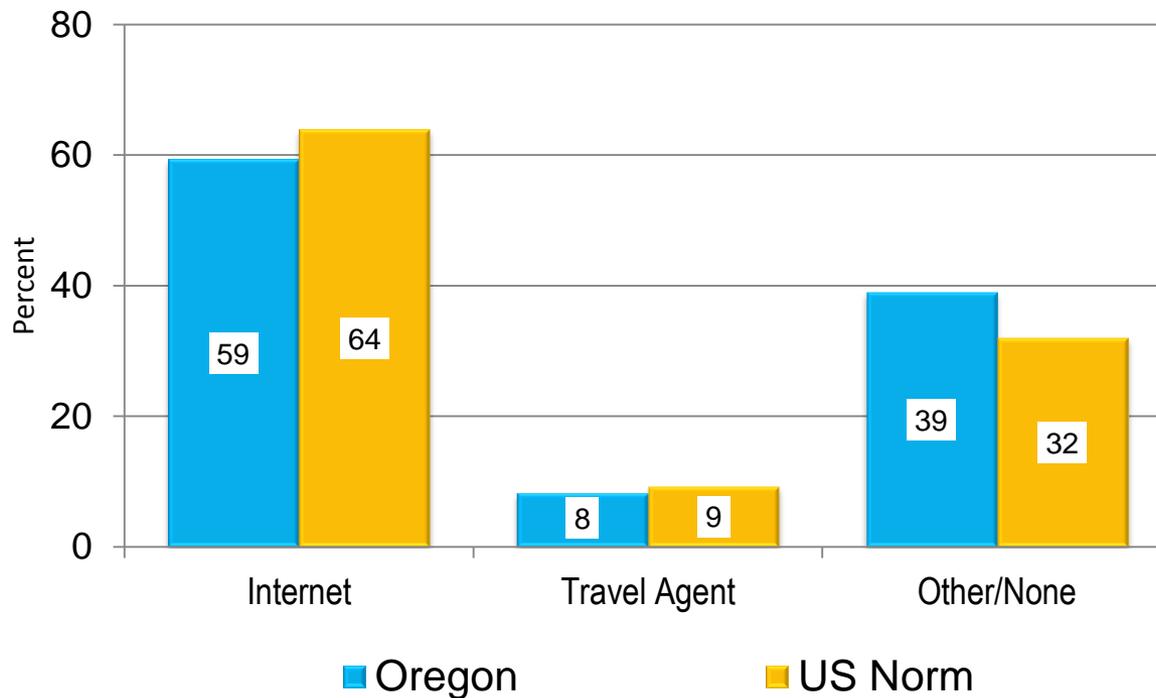
Base: Overnight Marketable Trips



Method of Booking Trip



Base: Overnight Marketable Trips



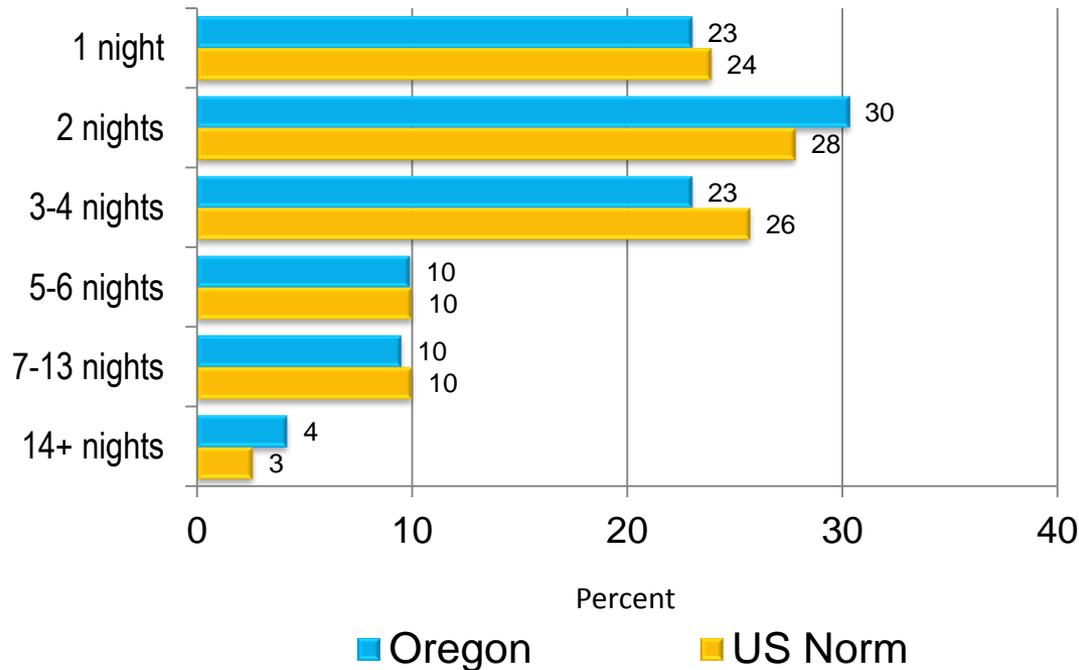
Total Nights Away on Trip



Base: Overnight Marketable Trips

Average Oregon = 3.9 Nights

Average US Norm = 3.5 Nights

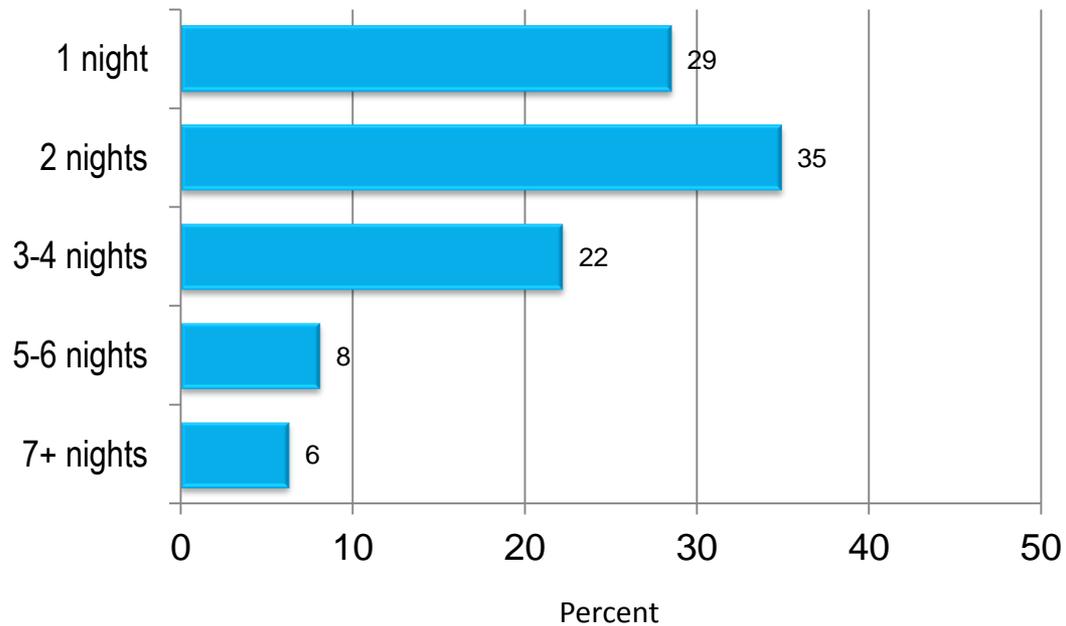


Number of Nights Spent in Oregon



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

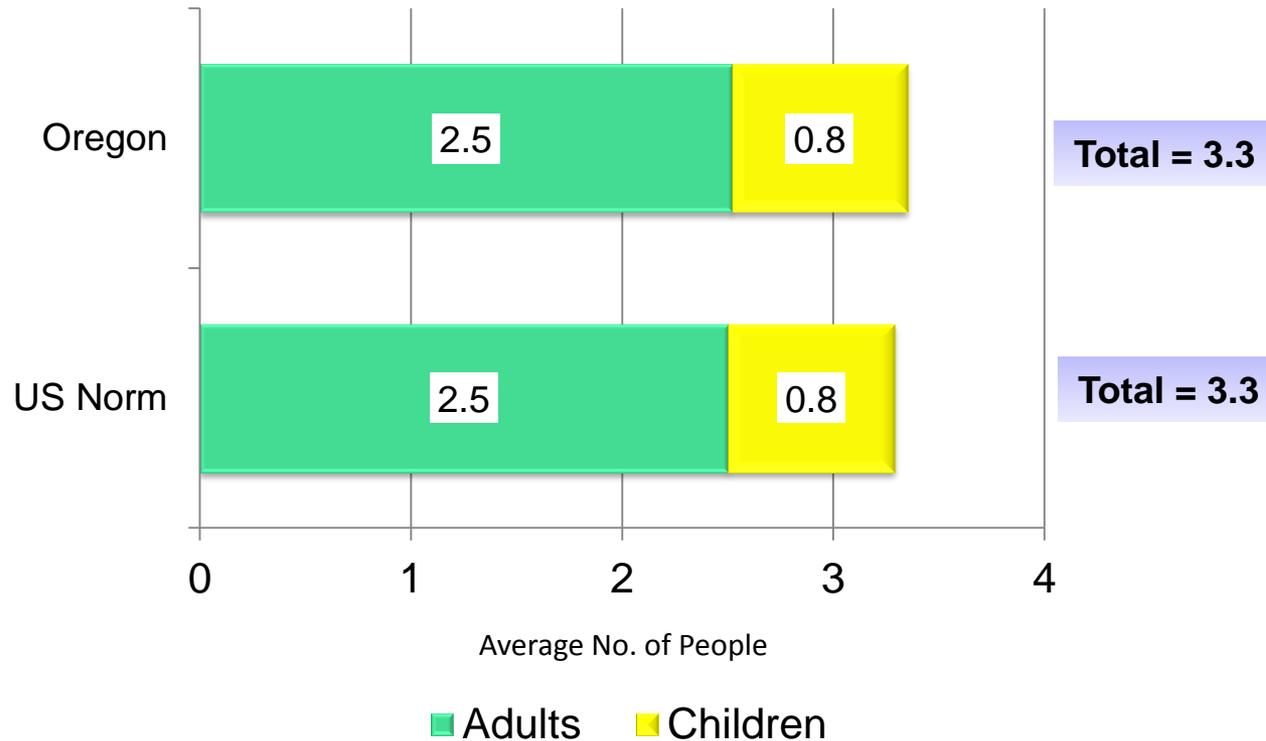
Average Nights Spent in Oregon = 2.9



Size of Travel Party



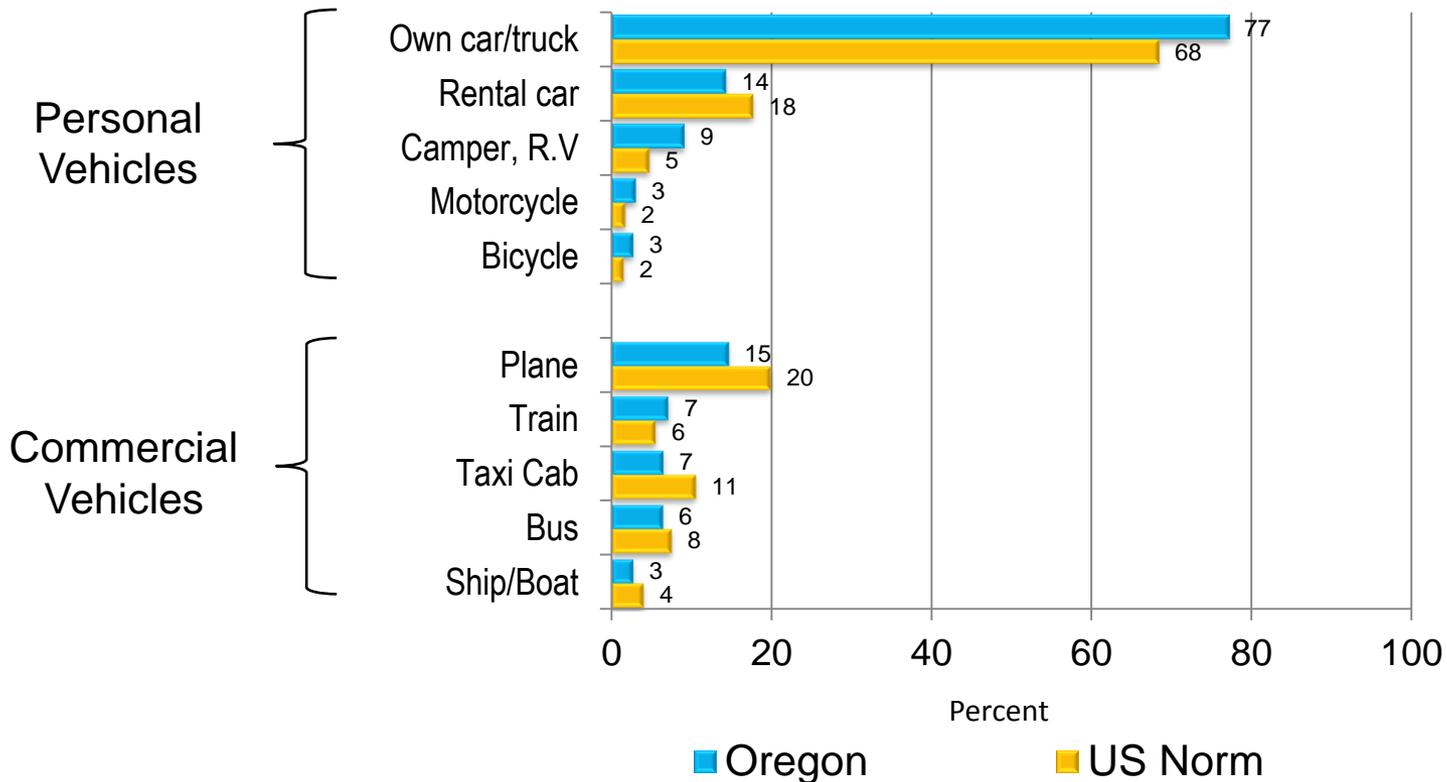
Base: Overnight Marketable Trips



Transportation



Base: Overnight Marketable Trips

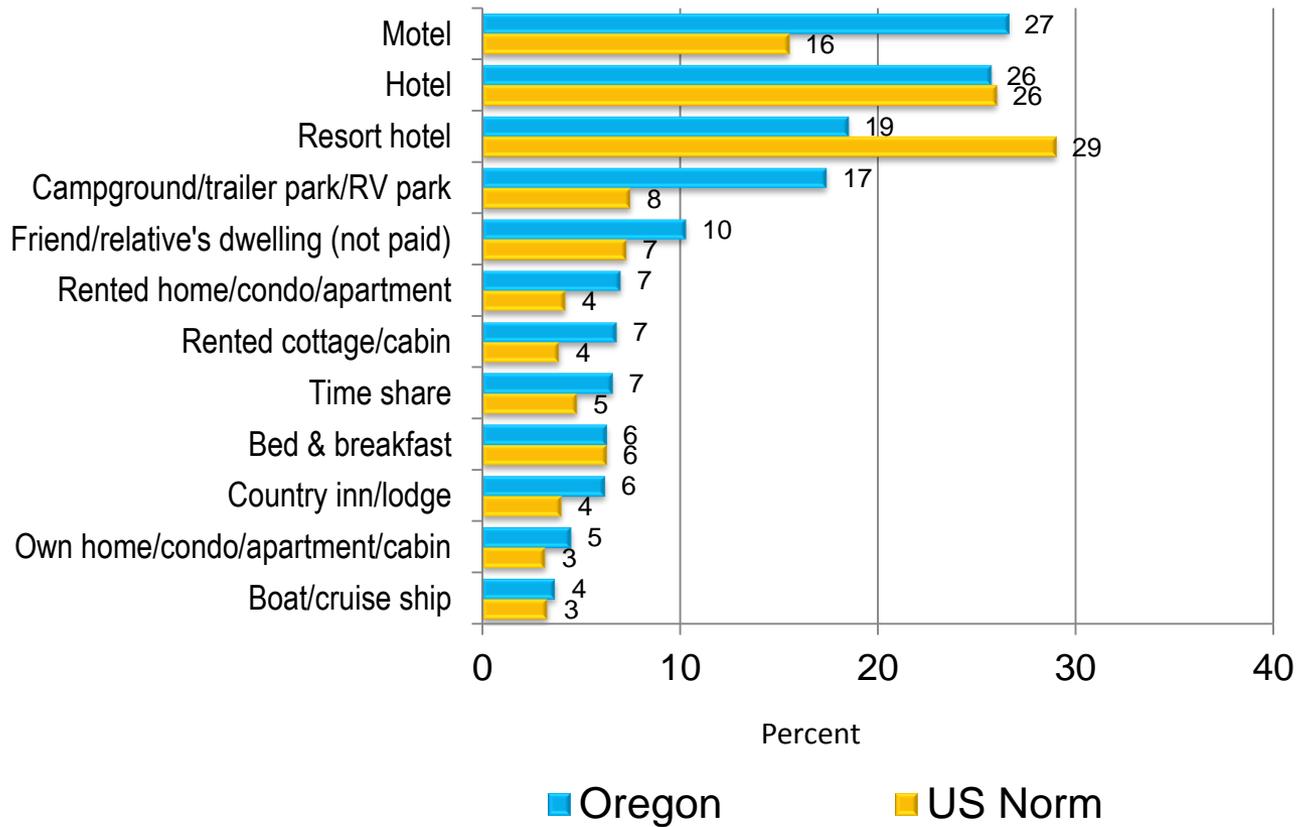


Responses to question: "What types of transportation did you use on this trip?"

Accommodation



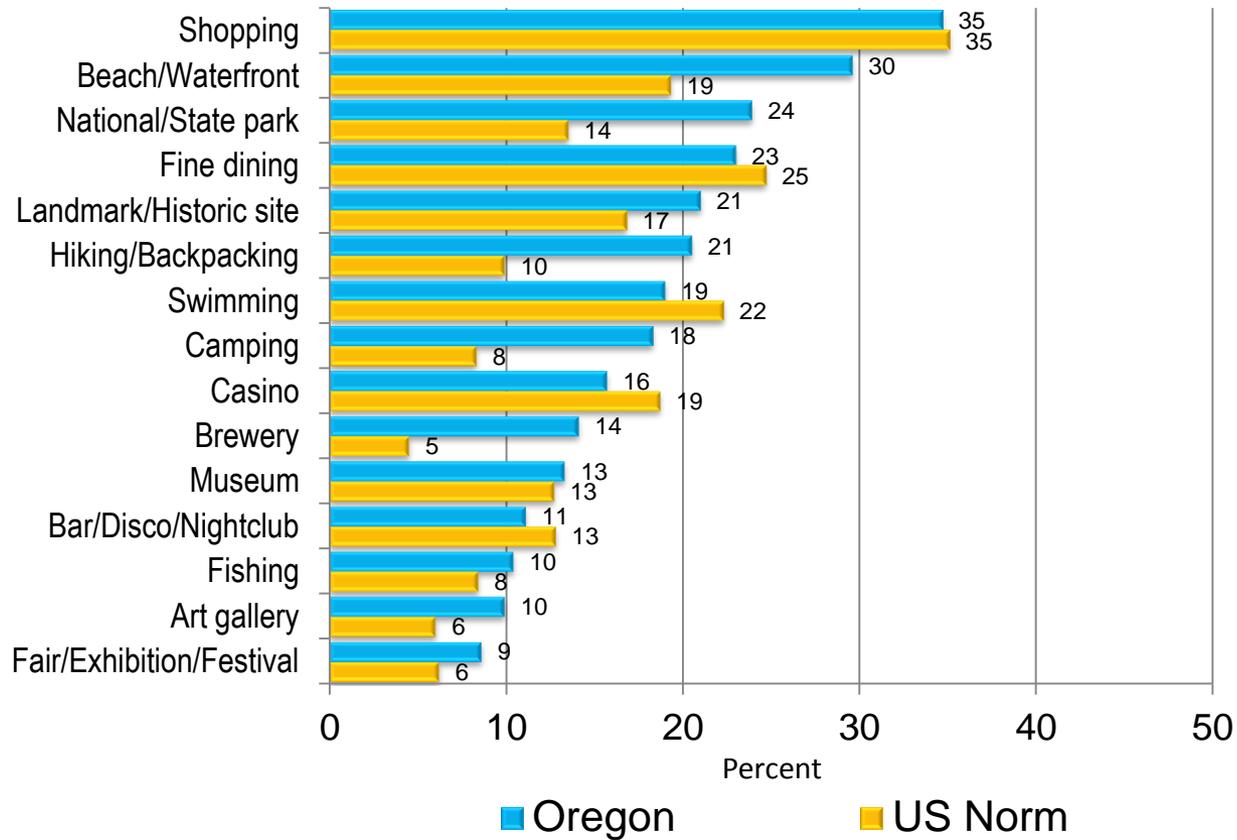
Base: Overnight Marketable Trips



Activities and Experiences



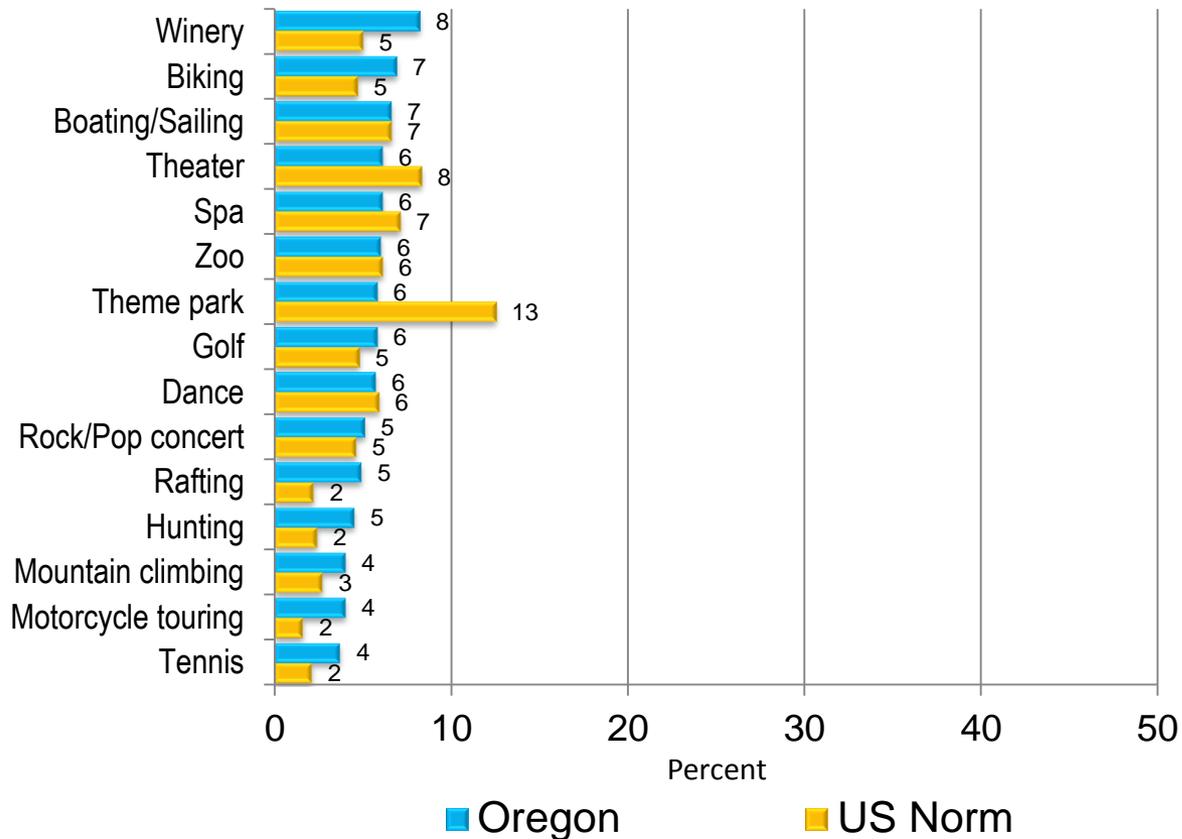
Base: Overnight Marketable Trips



Activities and Experiences (Cont'd)



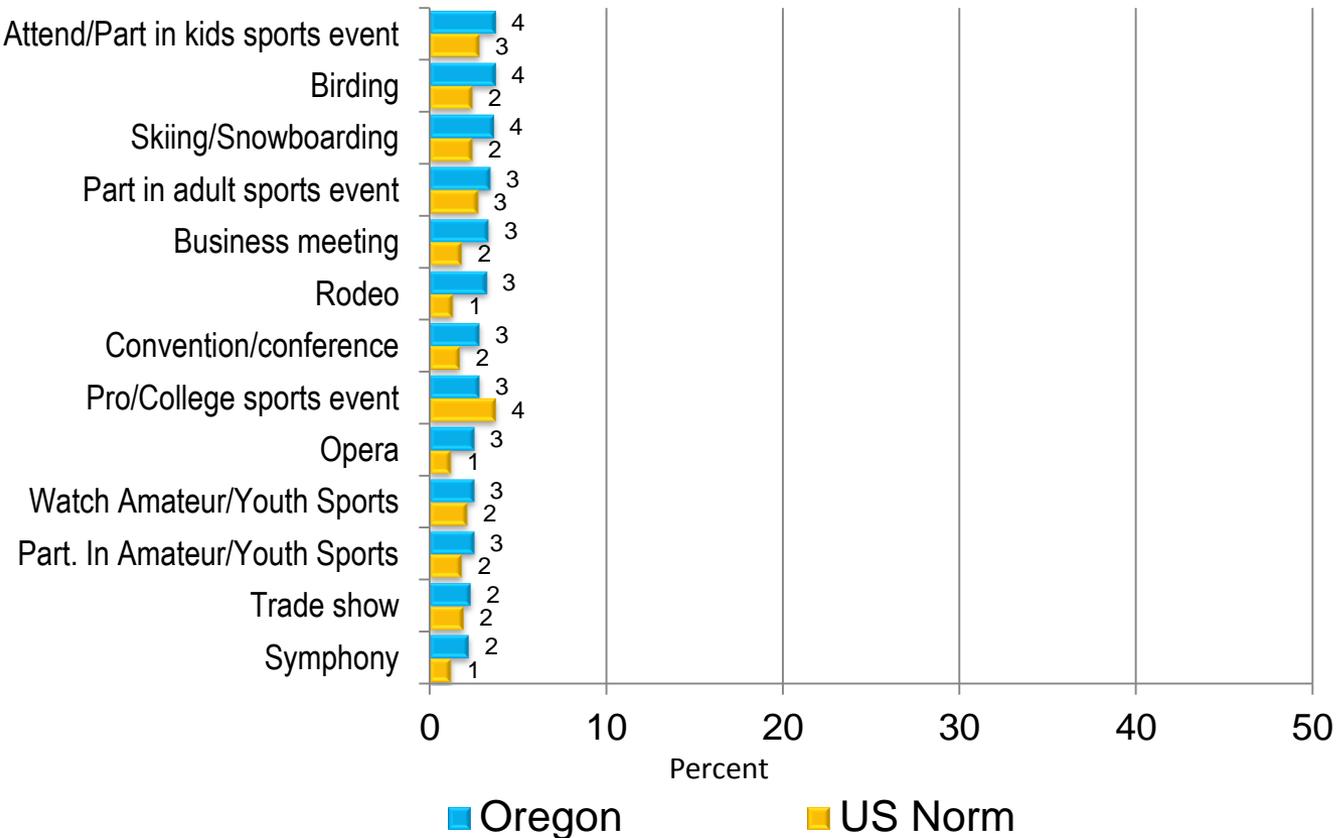
Base: Overnight Marketable Trips



Activities and Experiences (Cont'd)



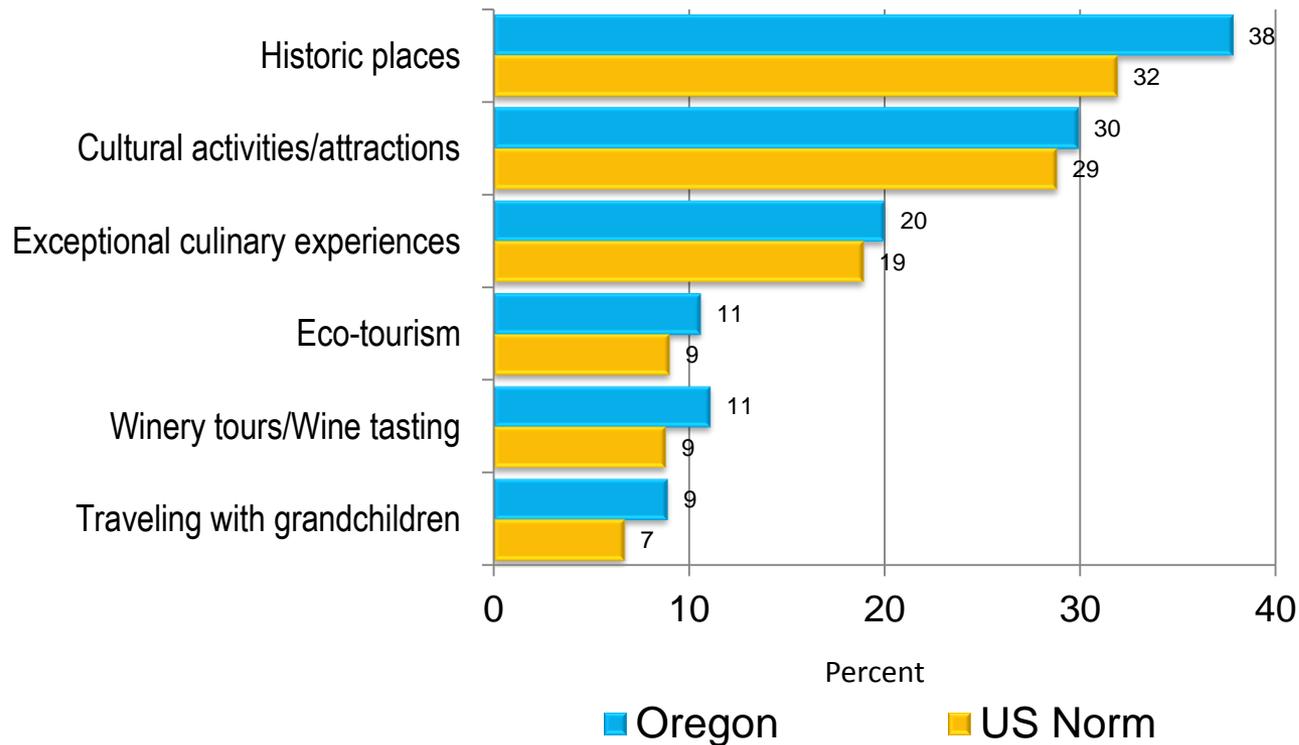
Base: Overnight Marketable Trips



Activities of Special Interest



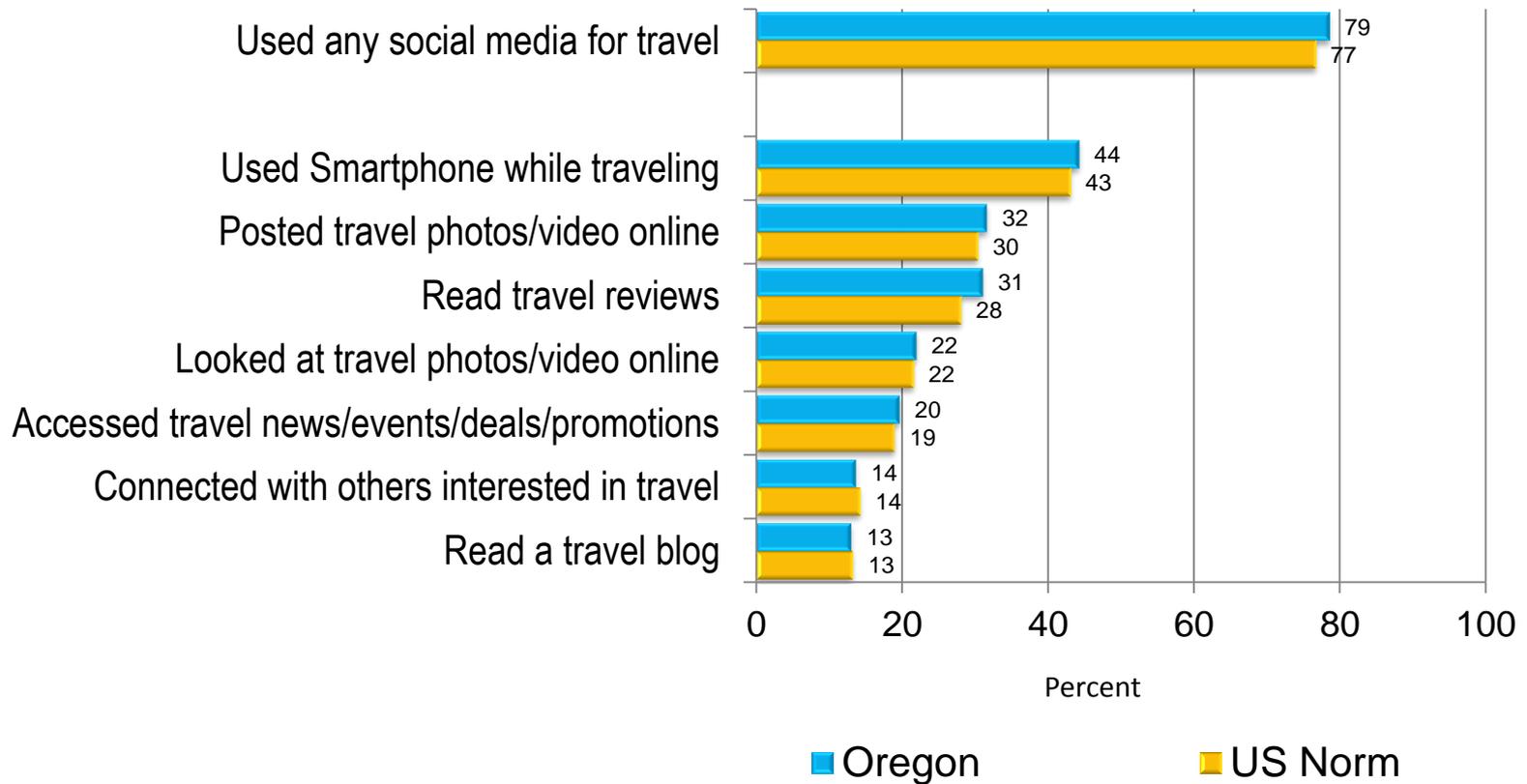
Base: Overnight Marketable Trips



Online Social Media Use by Travelers



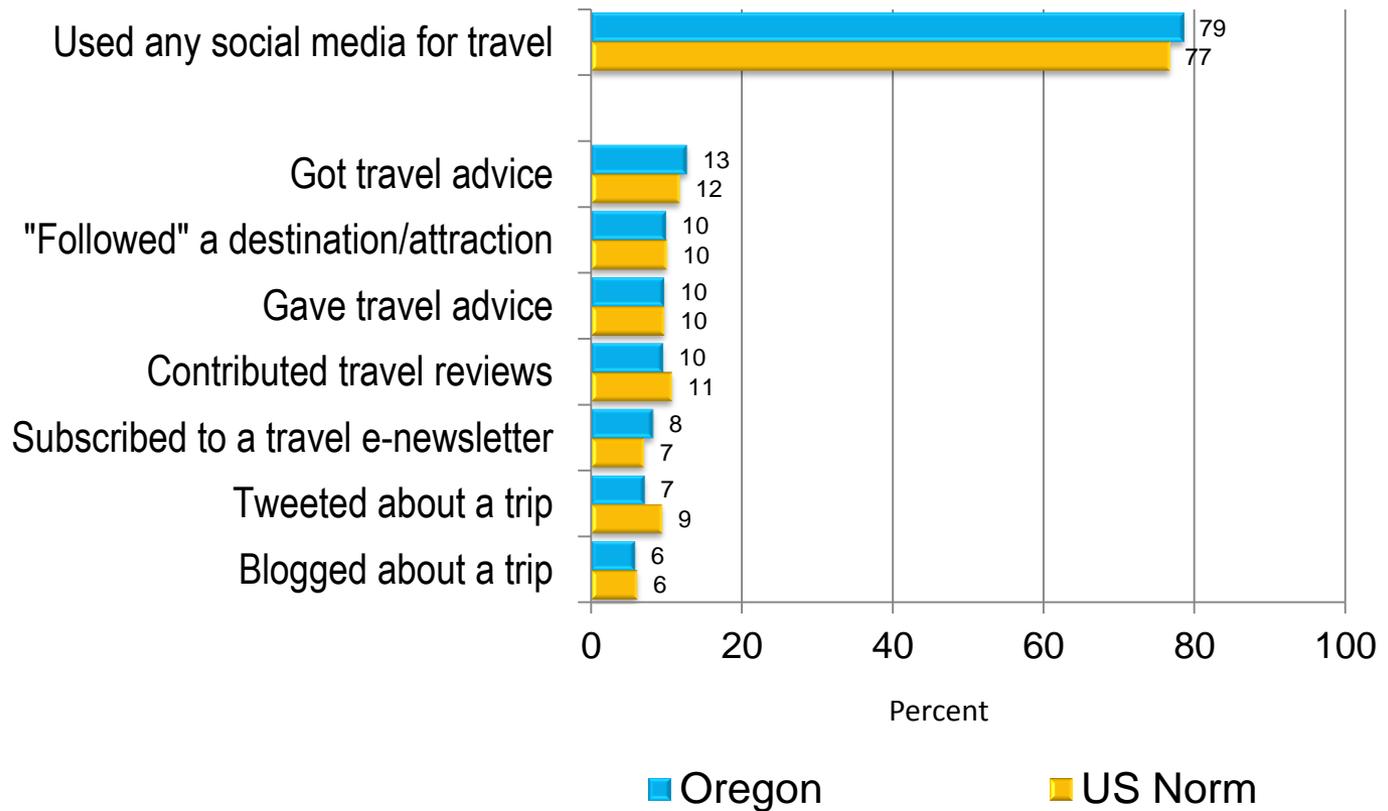
Base: Overnight Marketable Trips



Online Social Media Use by Travelers (Cont'd)



Base: Overnight Marketable Trips





Day Trip Detail

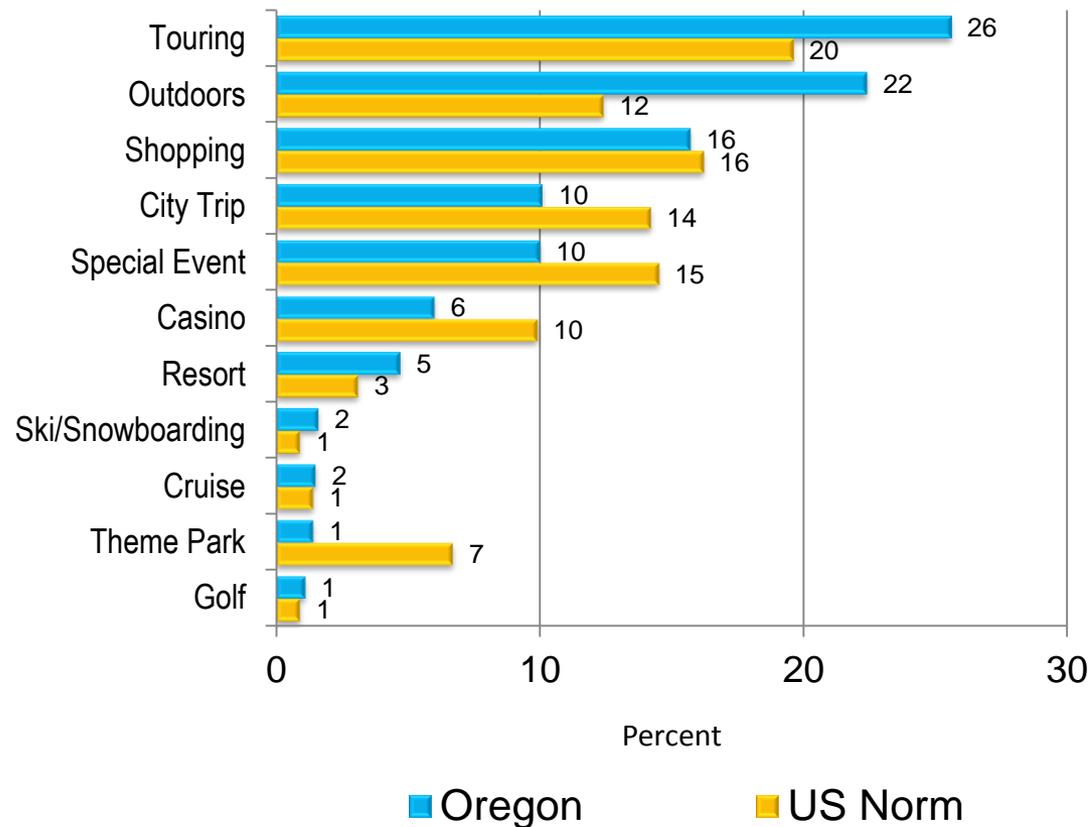


Day Trip Characteristics

Main Purpose of Marketable Trip – Oregon vs. National Norm



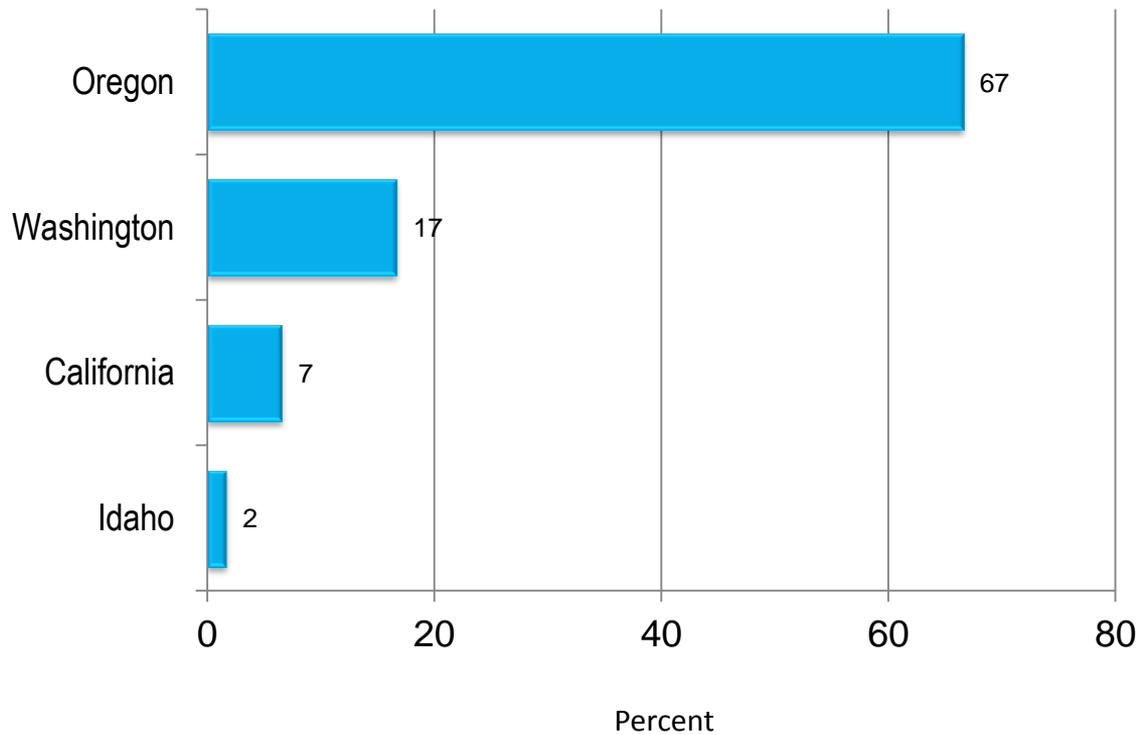
Base: Day Marketable Trips



State Origin Of Trip



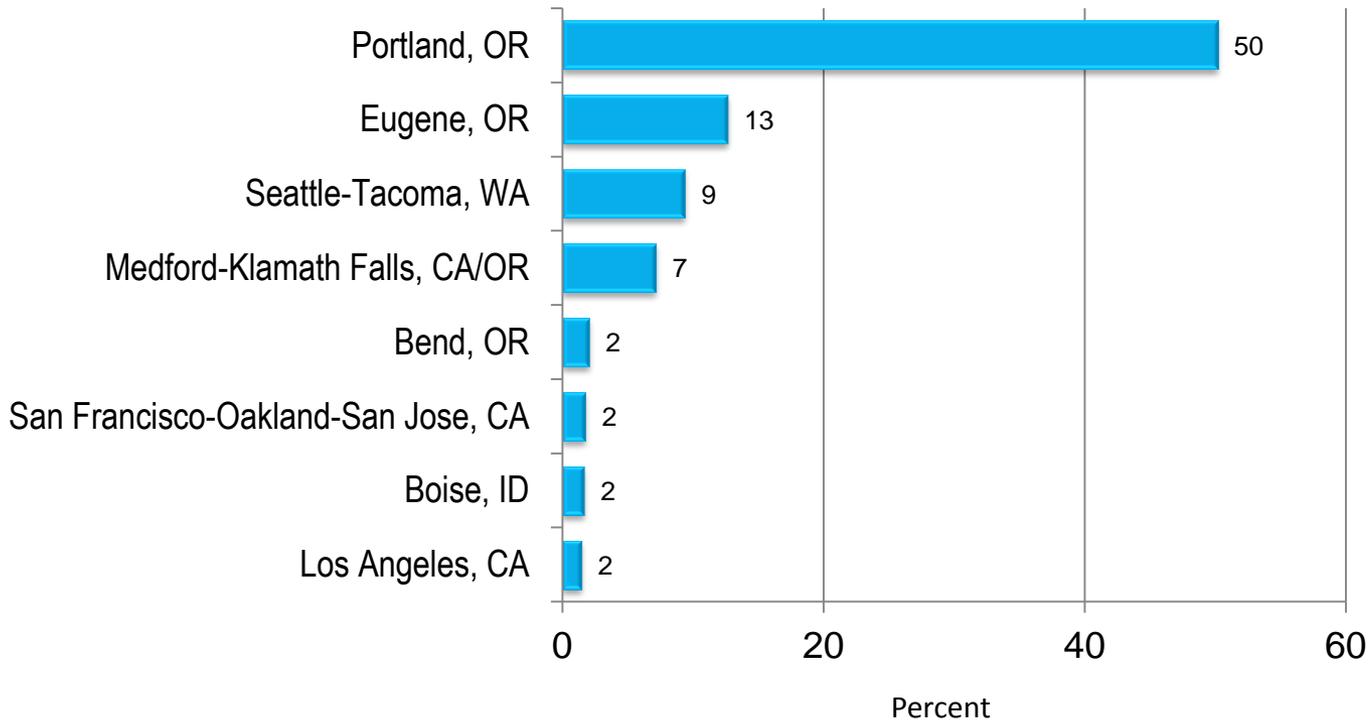
Base: Day Marketable Trips



DMA Origin Of Trip



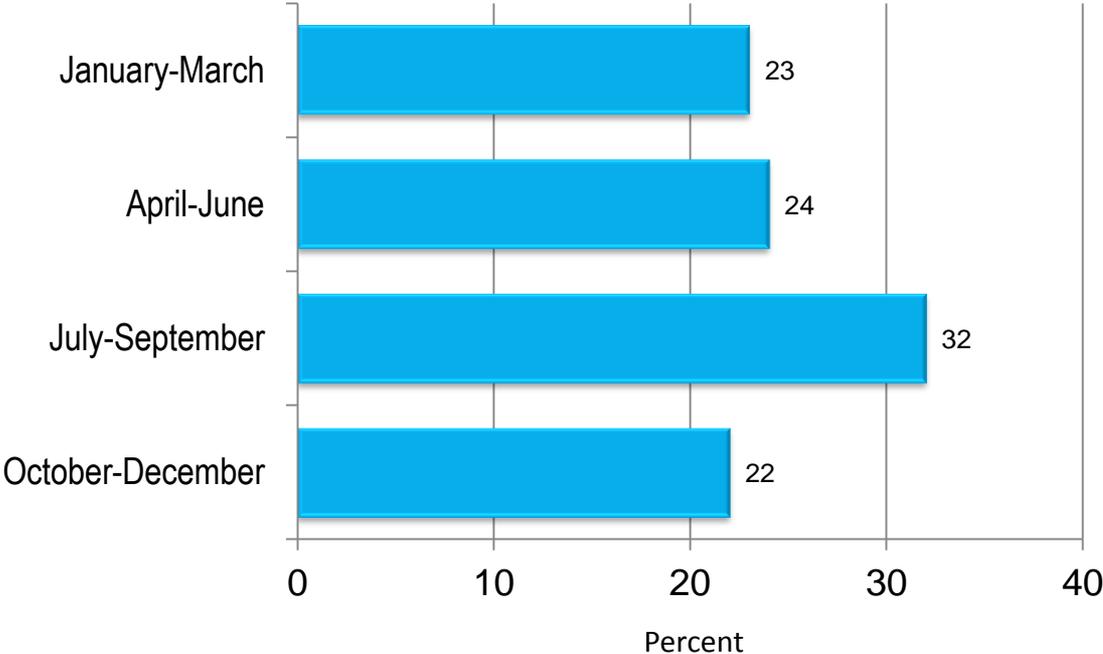
Base: Day Marketable Trips



Season of Trip



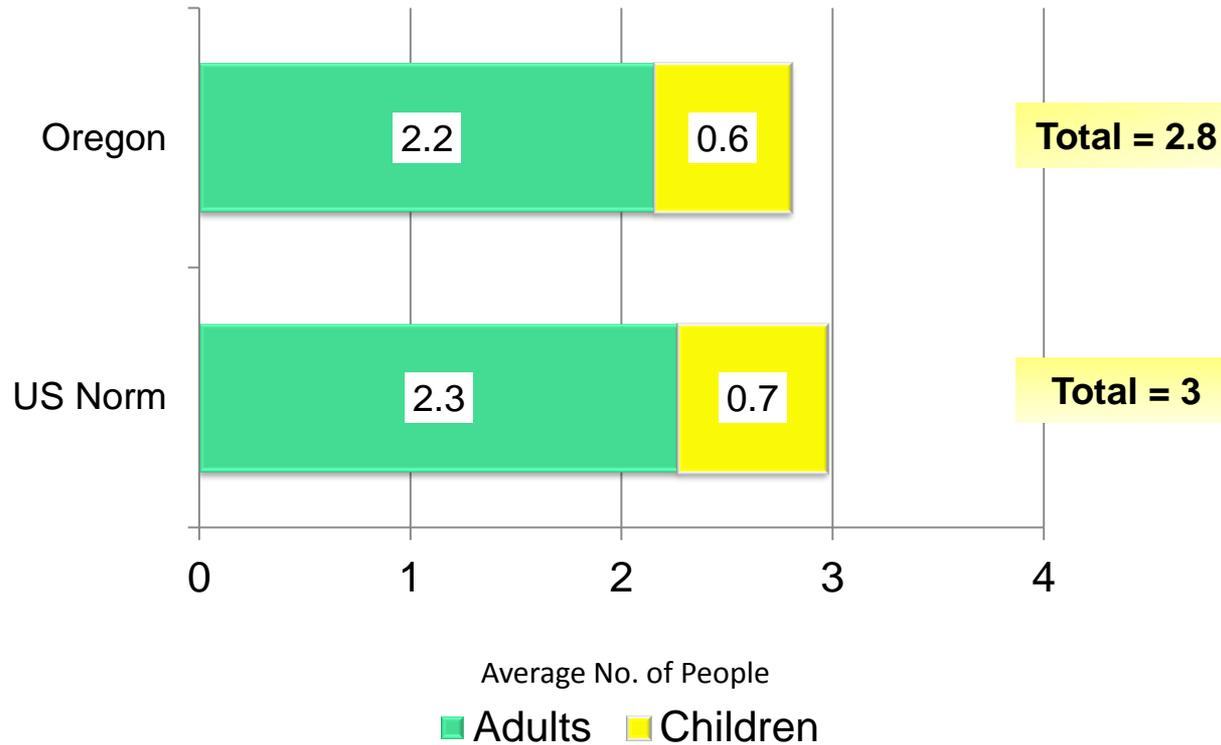
Base: Day Marketable Trips



Size of Travel Party



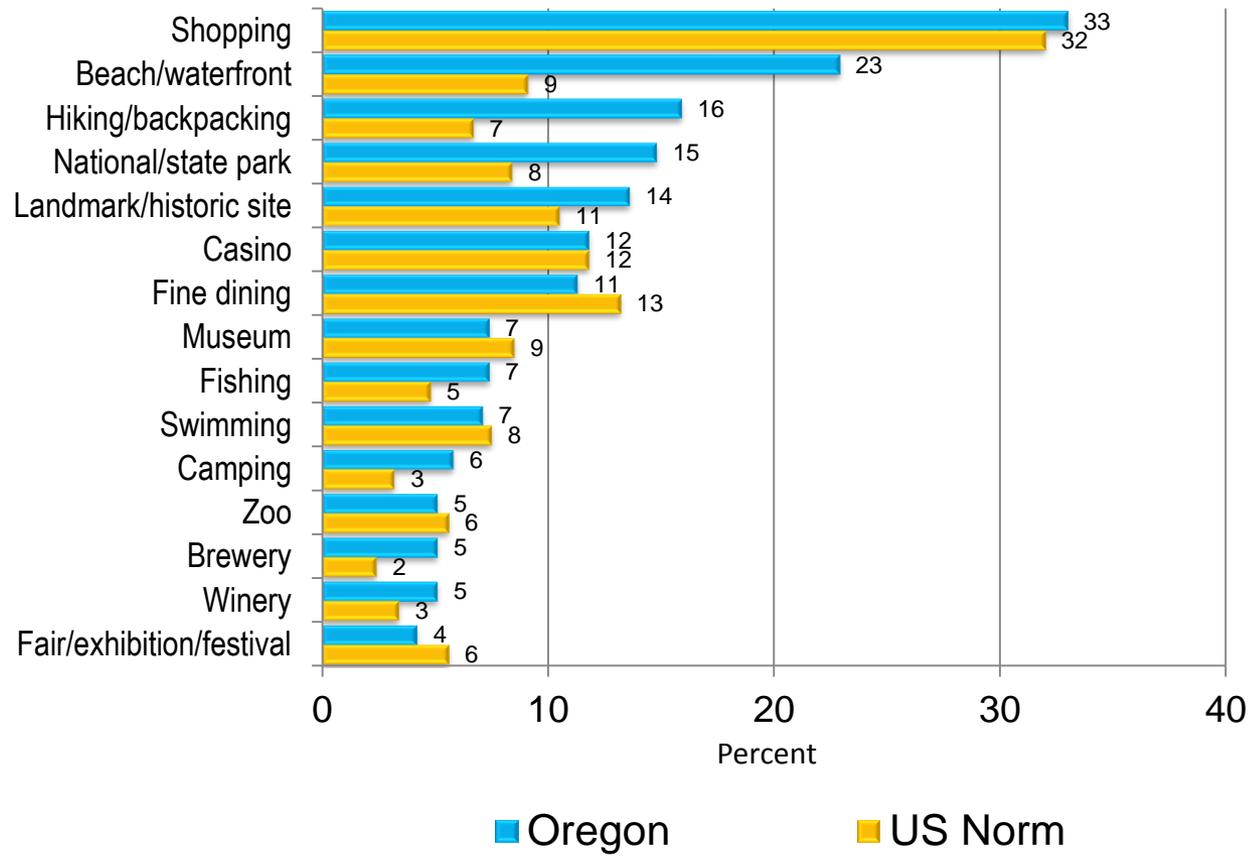
Base: Day Marketable Trips



Activities and Experiences



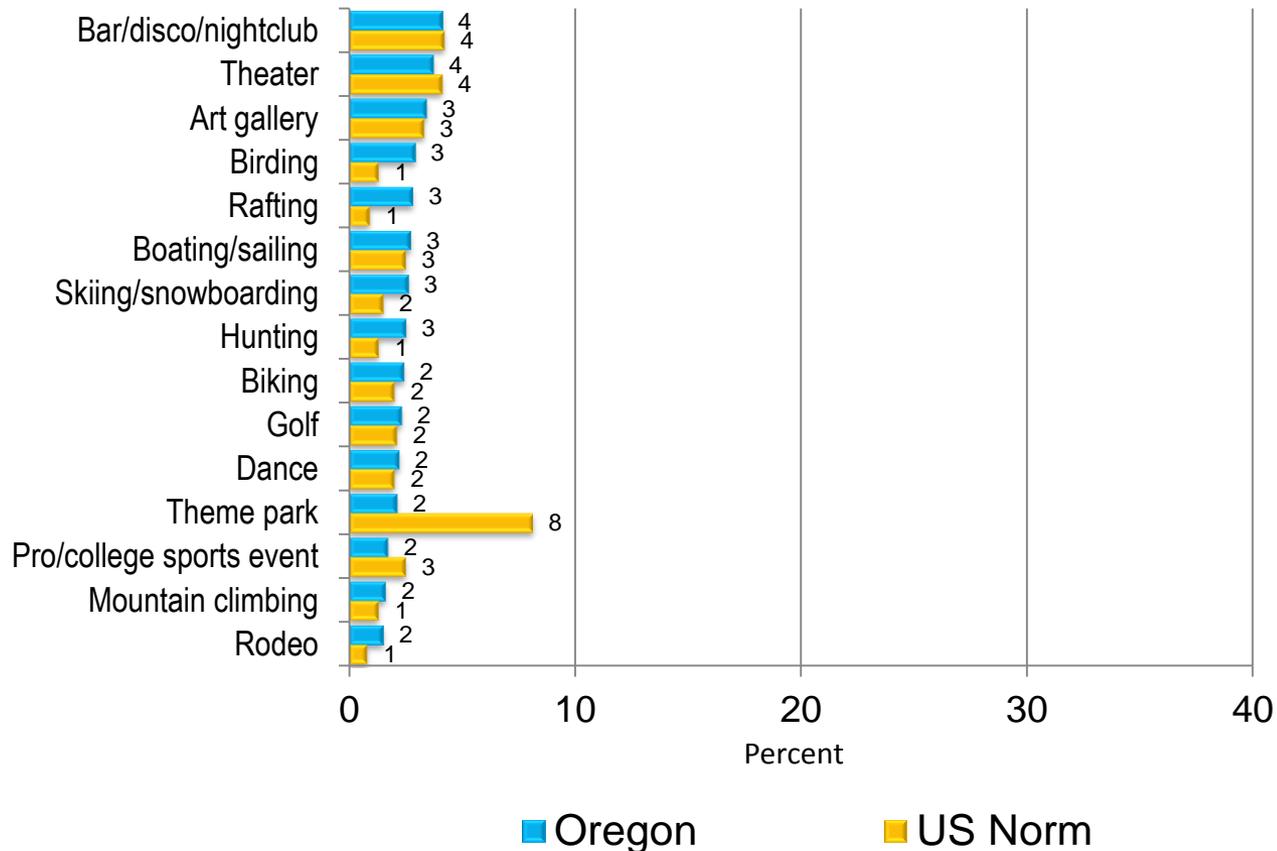
Base: Day Marketable Trips



Activities and Experiences (Cont'd)



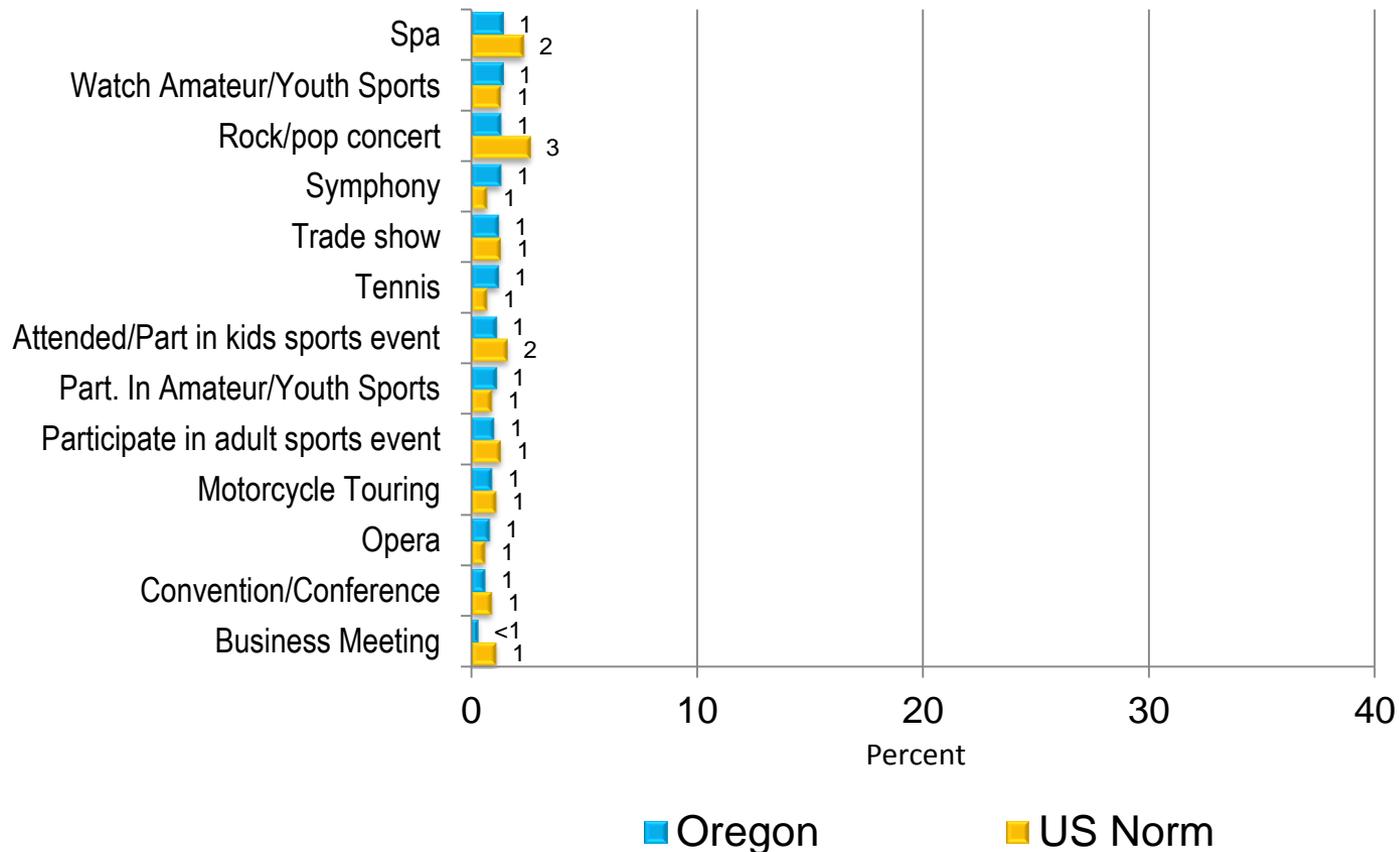
Base: Day Marketable Trips



Activities and Experiences (Cont'd)



Base: Day Marketable Trips



Activities of Special Interest



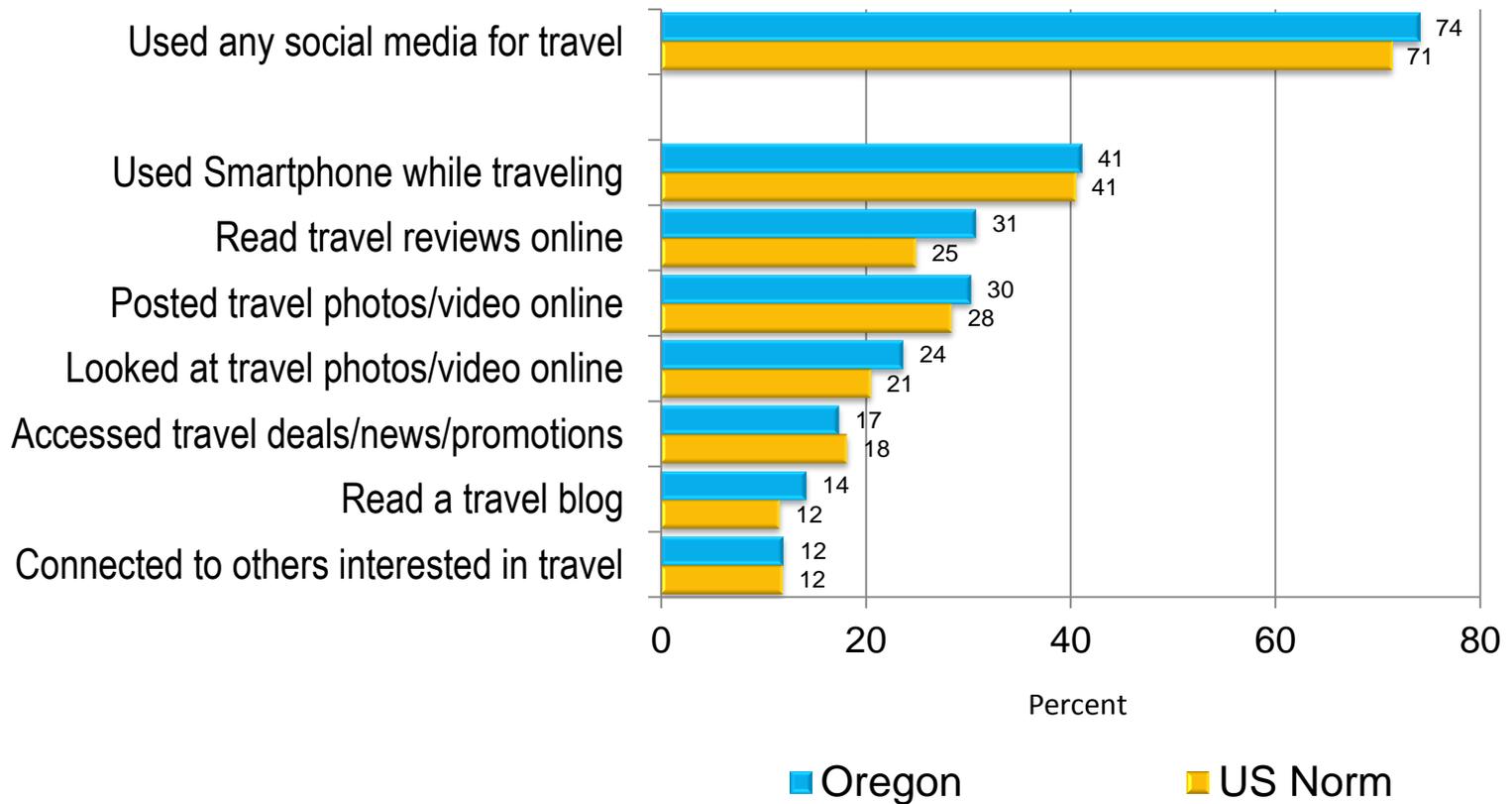
Base: Day Marketable Trips



Social Media Use by Travelers



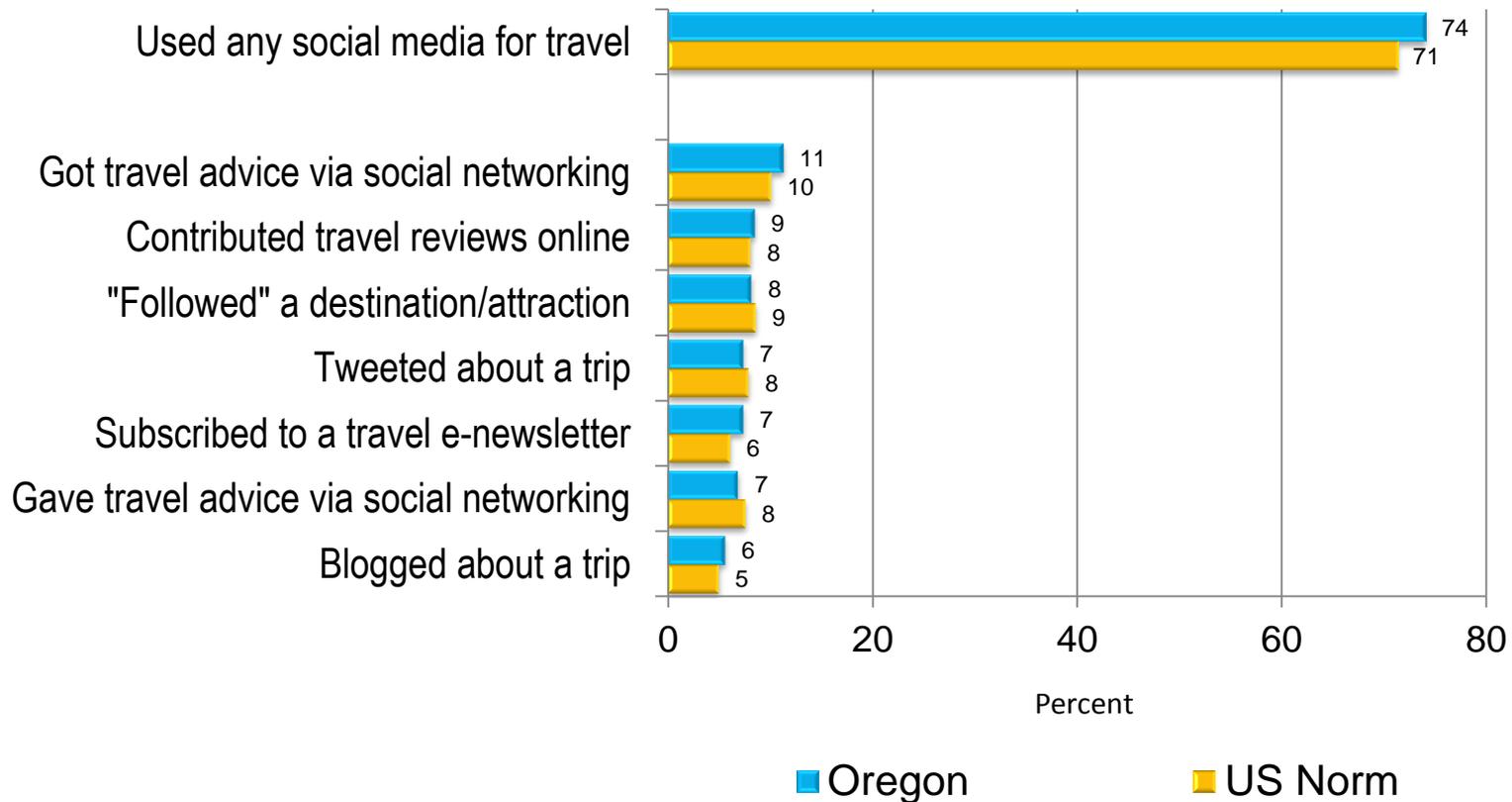
Base: Day Marketable Trips



Social Media Use by Travelers (Cont'd)



Base: Day Marketable Trips



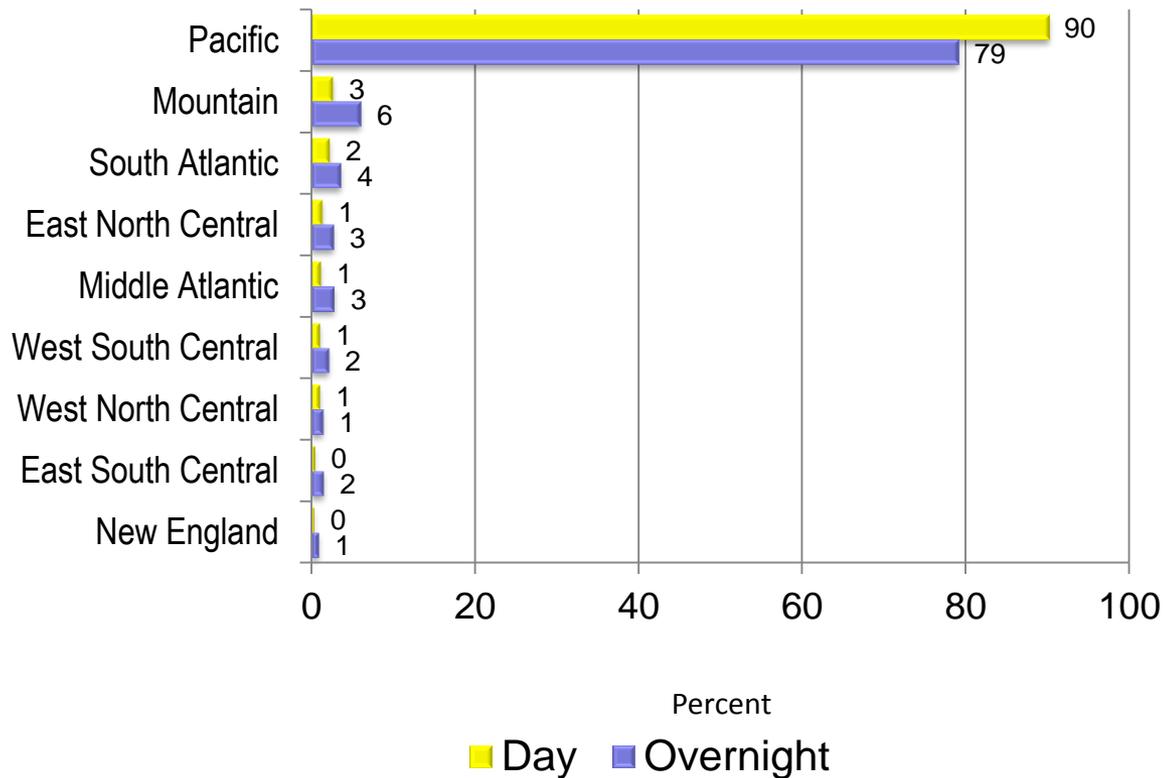


Demographic Profile of Visitors to Oregon

Region of Residence



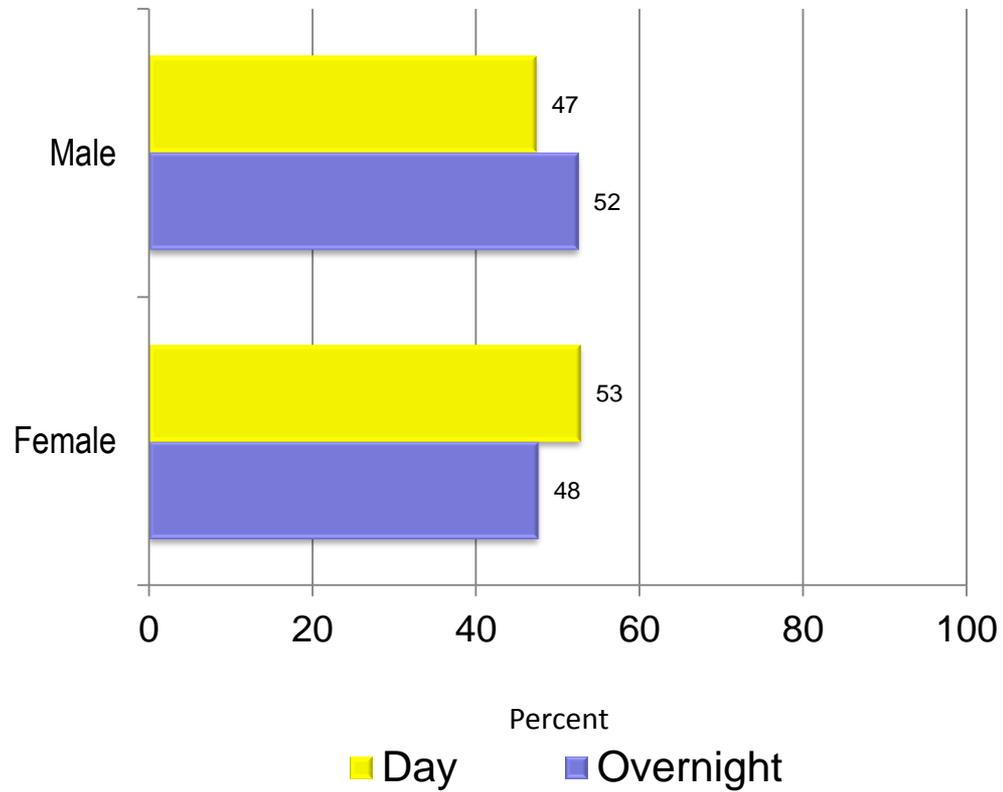
Base: Total Marketable Trips



Gender



Base: Total Marketable Trips



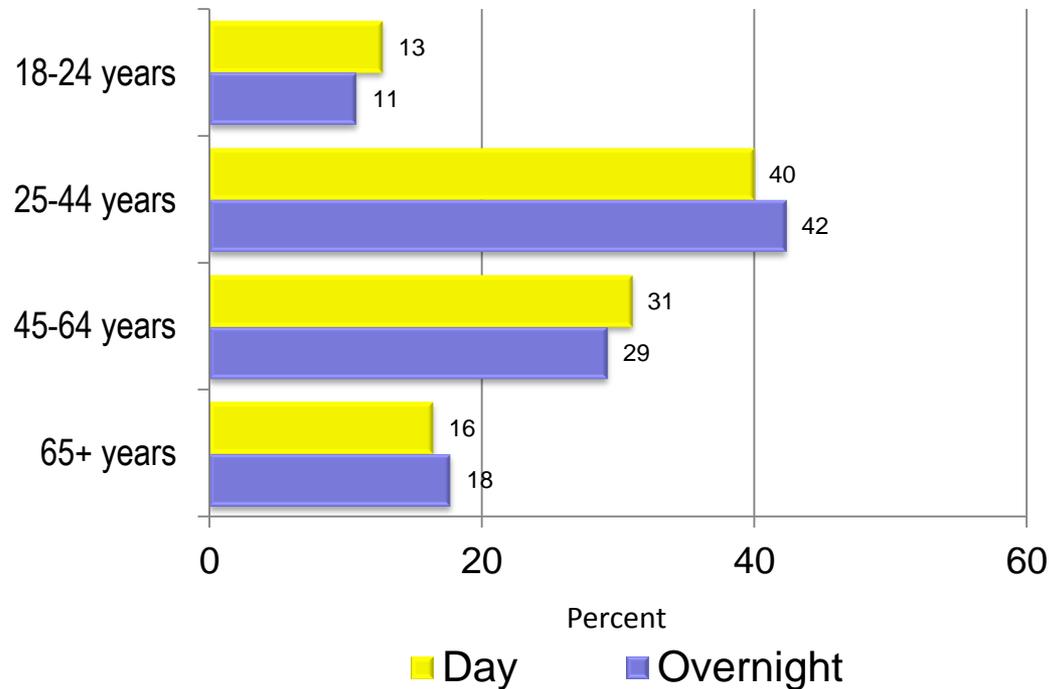
Age



Base: Total Marketable Trips

Average Day = 44.8

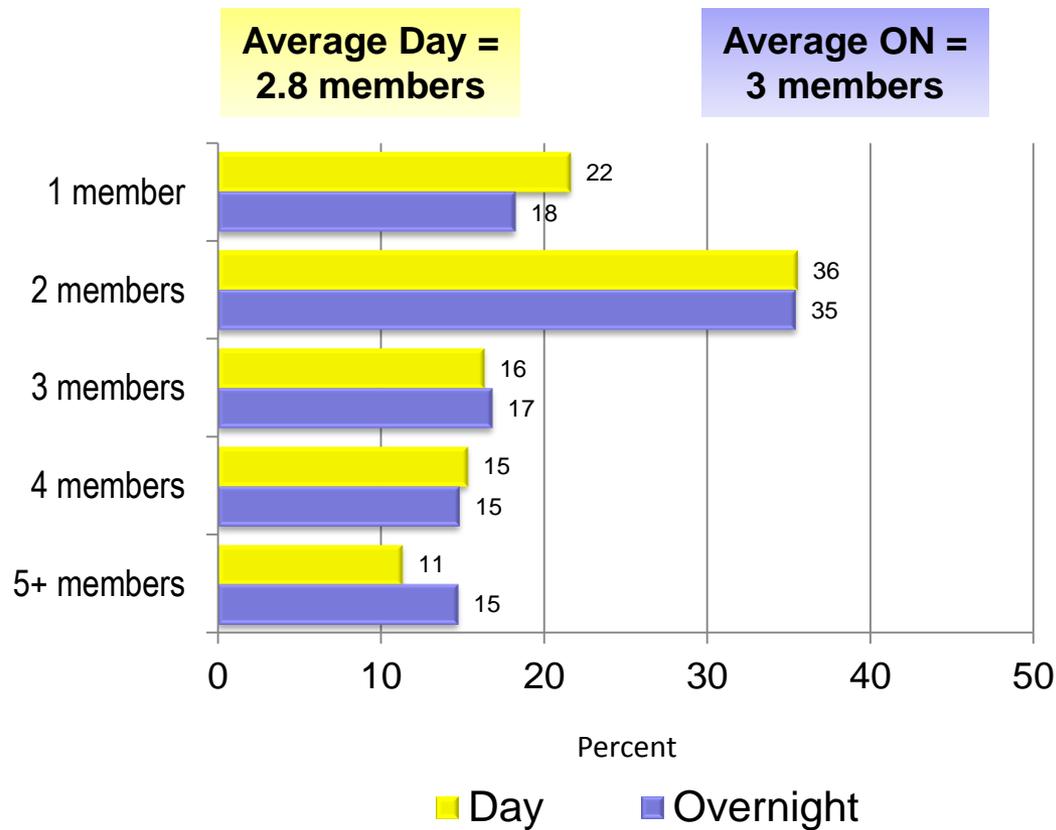
Average ON = 45



Household Size



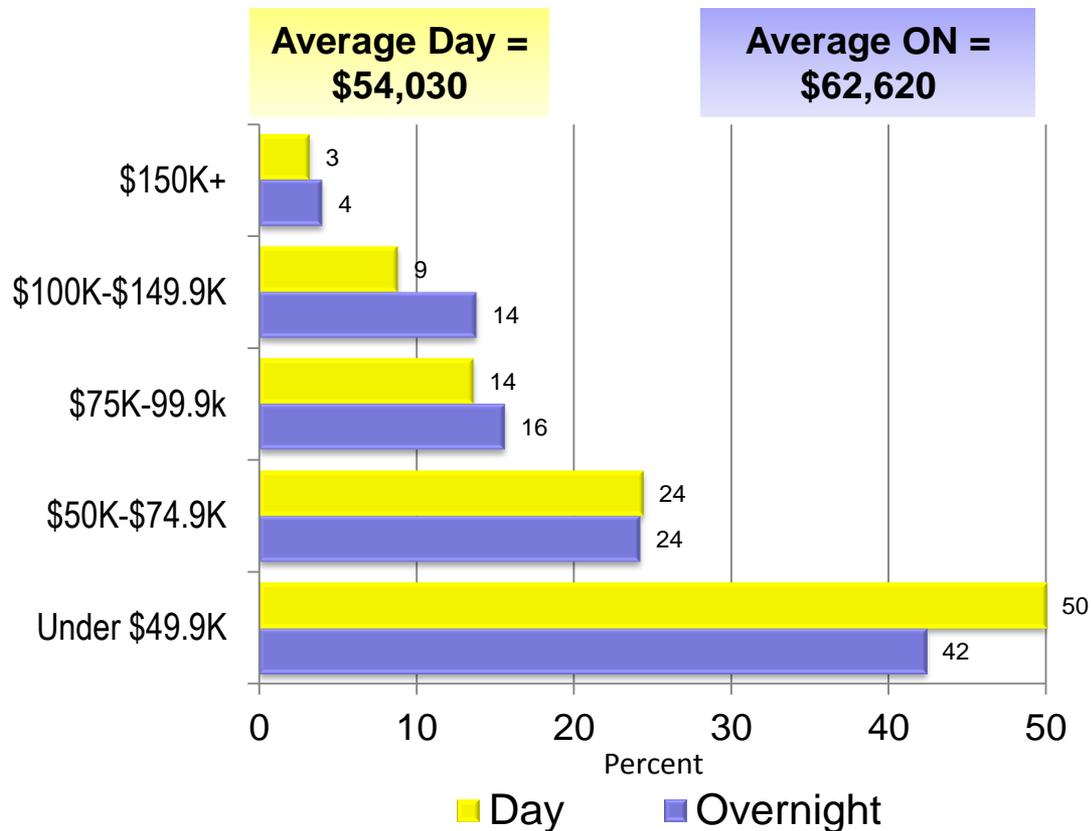
Base: Total Marketable Trips



Household Income



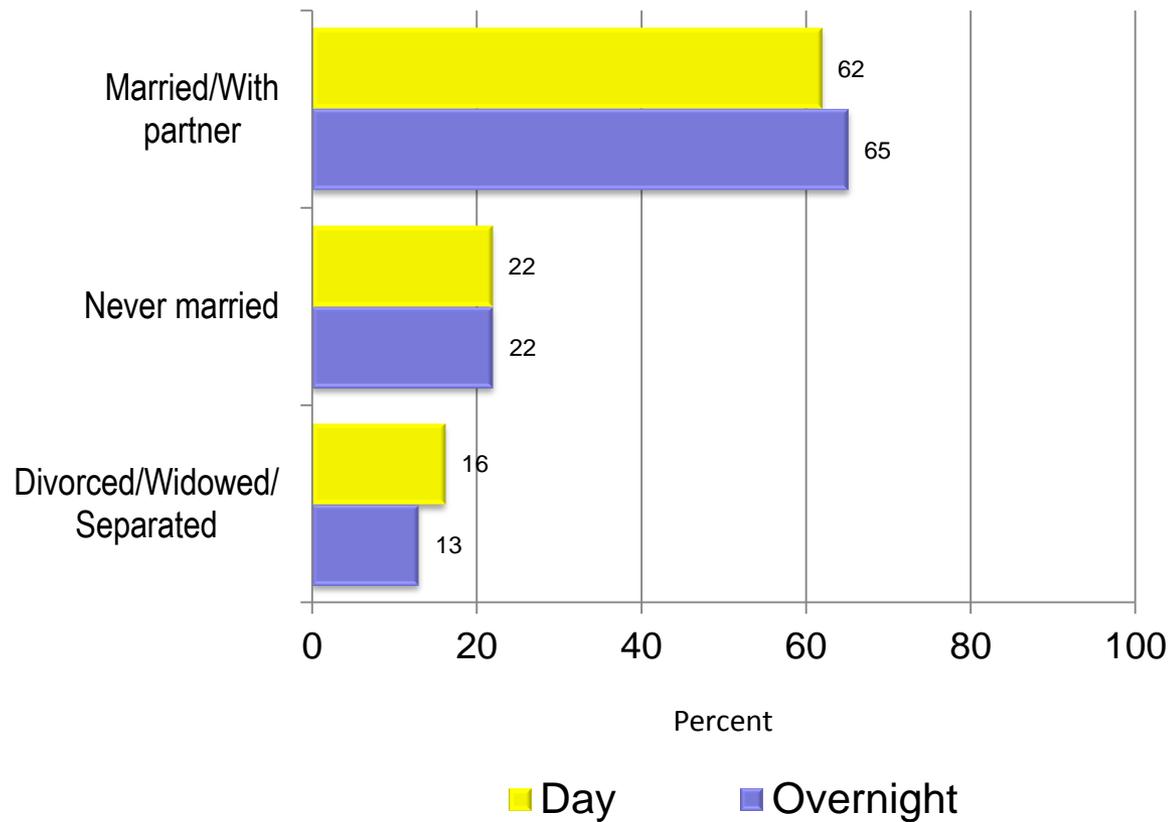
Base: Total Marketable Trips



Marital Status



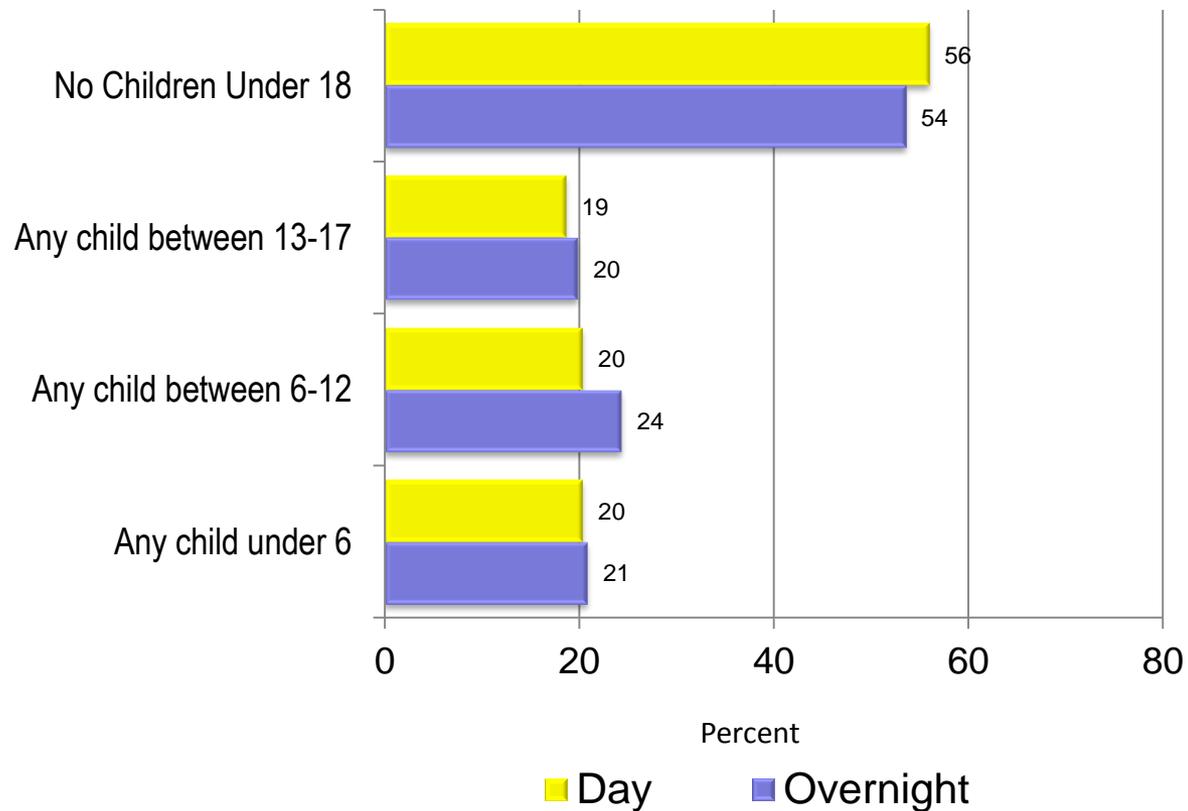
Base: Total Marketable Trips



Children in Household



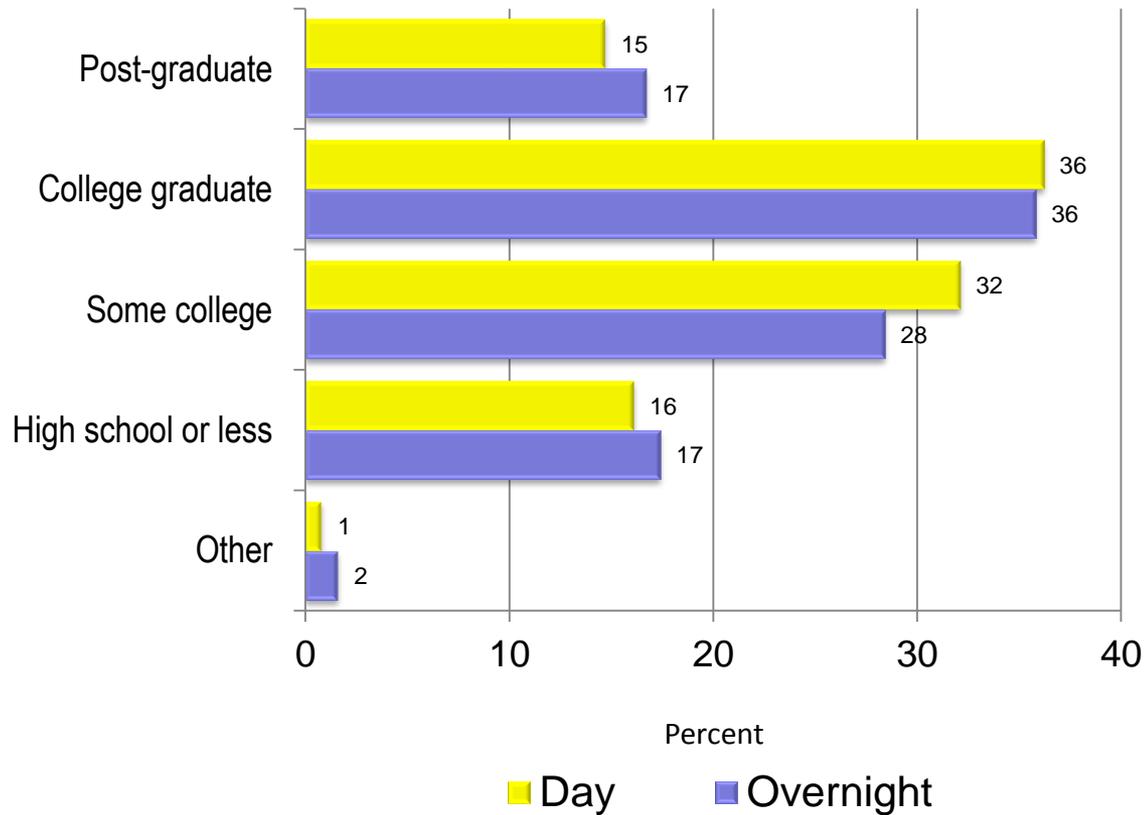
Base: Total Marketable Trips



Education



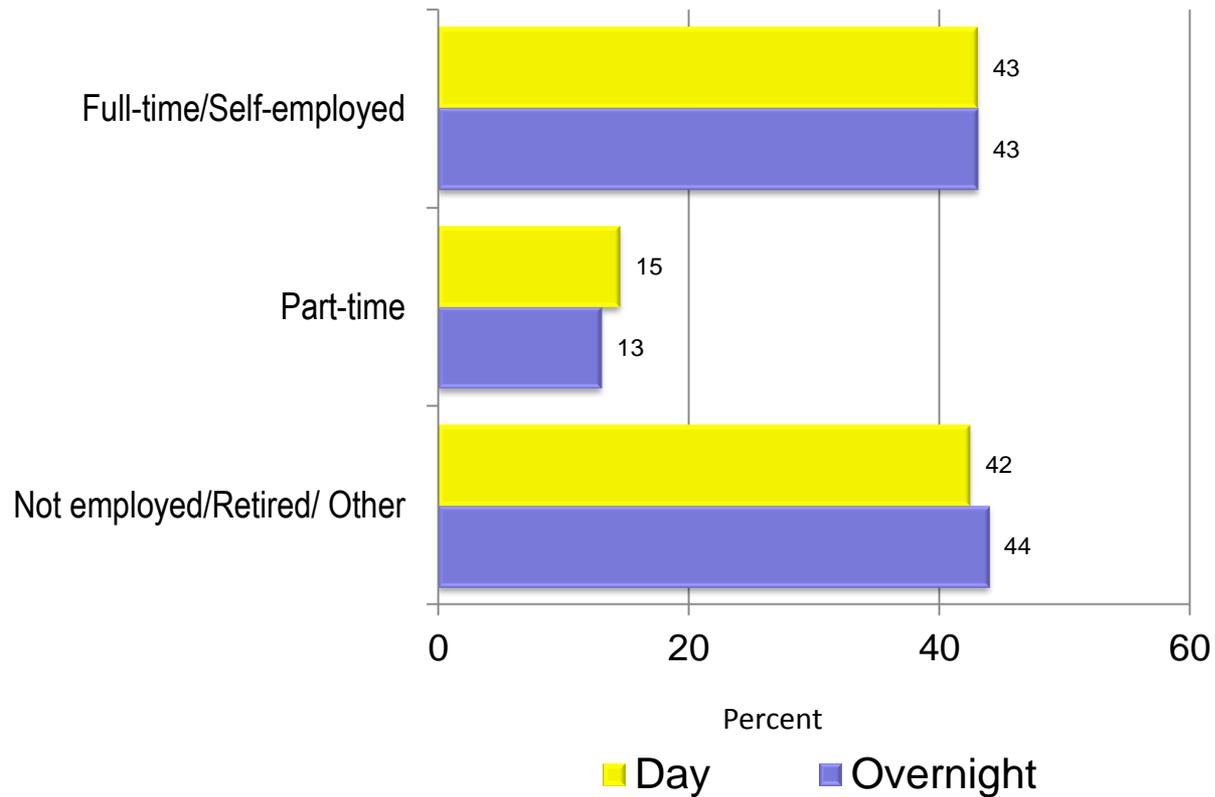
Base: Total Marketable Trips



Employment



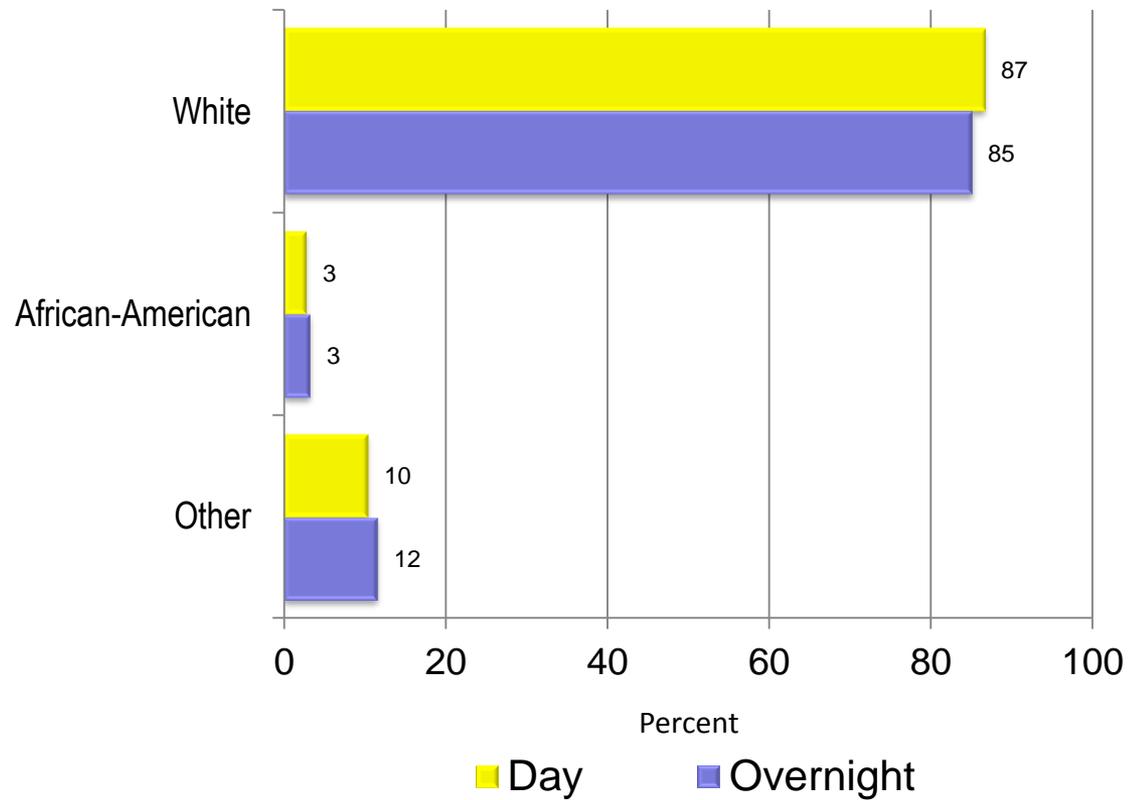
Base: Total Marketable Trips



Race



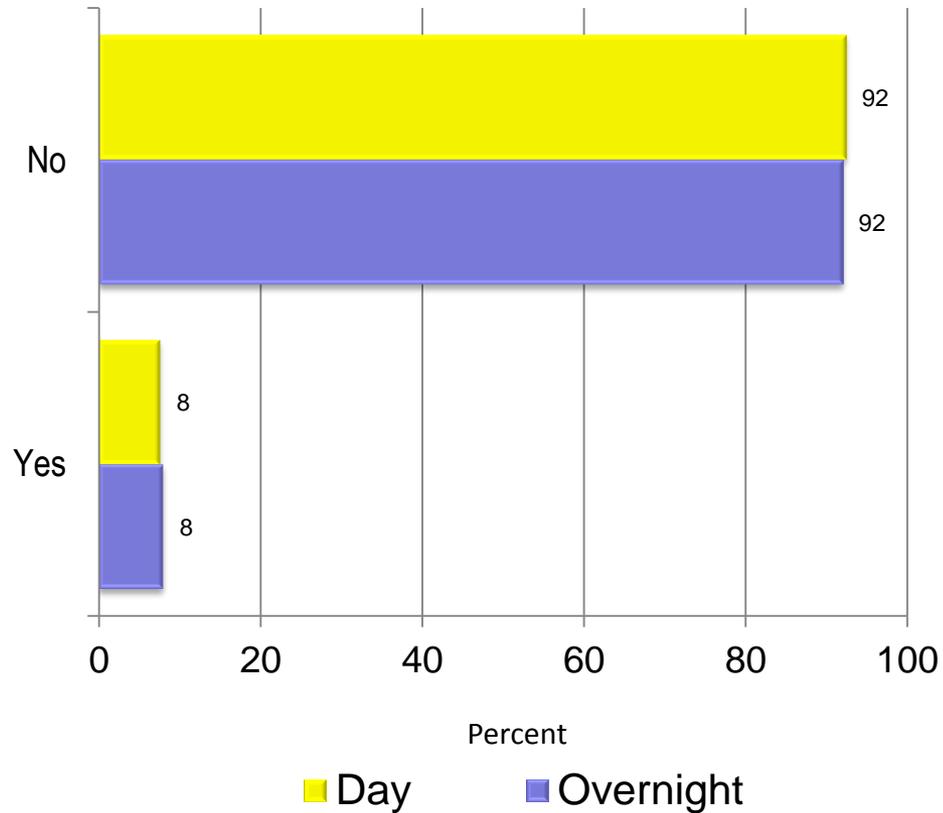
Base: Total Marketable Trips



Hispanic Background



Base: Total 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



Total Trips = Leisure + Business + 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