



Oregon 2015

Regional Visitor Report

The Central Region

Introduction



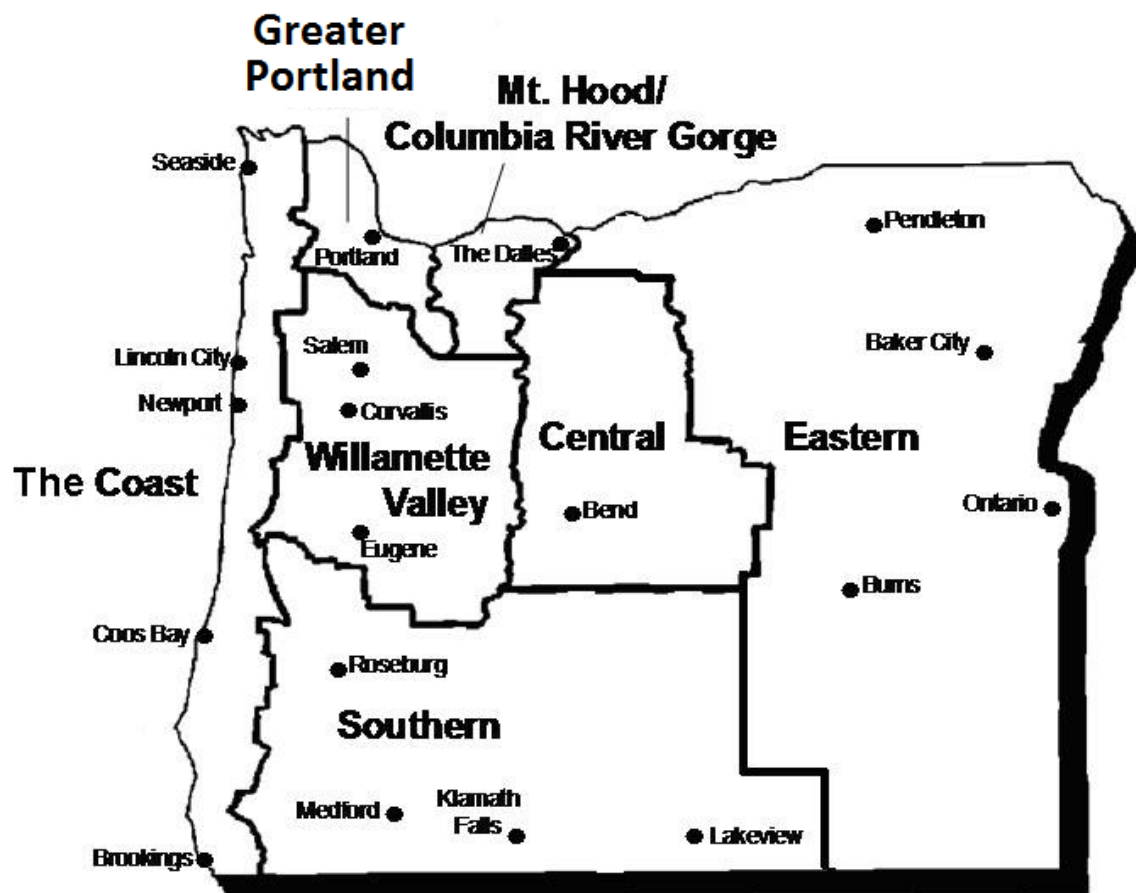
- ◉ Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- ◉ It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.
- ◉ This report provides:
 - ◉ *Estimates of 2015 overnight visitor volume and travel expenditures for Oregon as well as for the Central Region in particular*
 - ◉ *Strategic intelligence about the Central Region's overnight travel market including:*
 - ◉ *Key sources of business*
 - ◉ *Visitor profiling*
 - ◉ *Trip characteristics*

Methodology



- ◉ For each of the 2014 and 2015 travel years, a representative sample of visitors to the Central 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 8,031 overnight trips taken to Oregon in 2014 and 2015:
 - ◉ *981 included a visit to the Central Region*
 - ◉ *Of those, 512 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 Central Region are reported for the 2015 travel year, as are all Oregon state norms.
 - To maximize statistical reliability, other Central Region data (trip characteristics and visitor profiles) are based on two years' combined sample from 2014 and 2015 unless otherwise indicated.

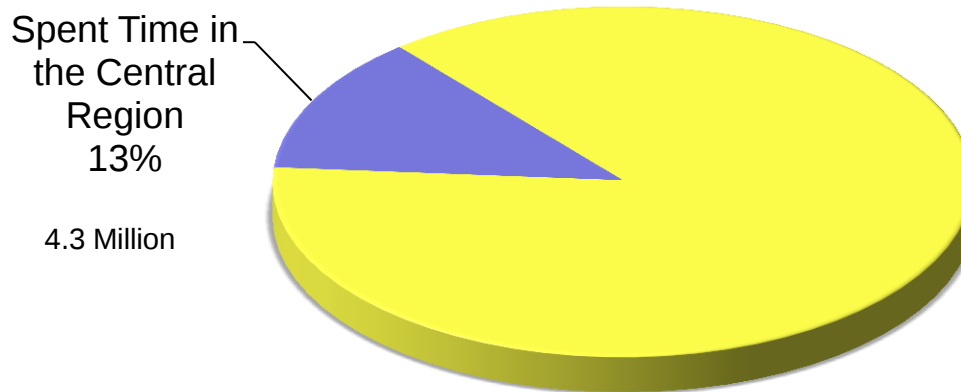
Travel Market Size & Structure

- 2015

Size of the Central Region's Overnight Travel Market



Total Overnight Trips to Oregon* = 33.1 Million

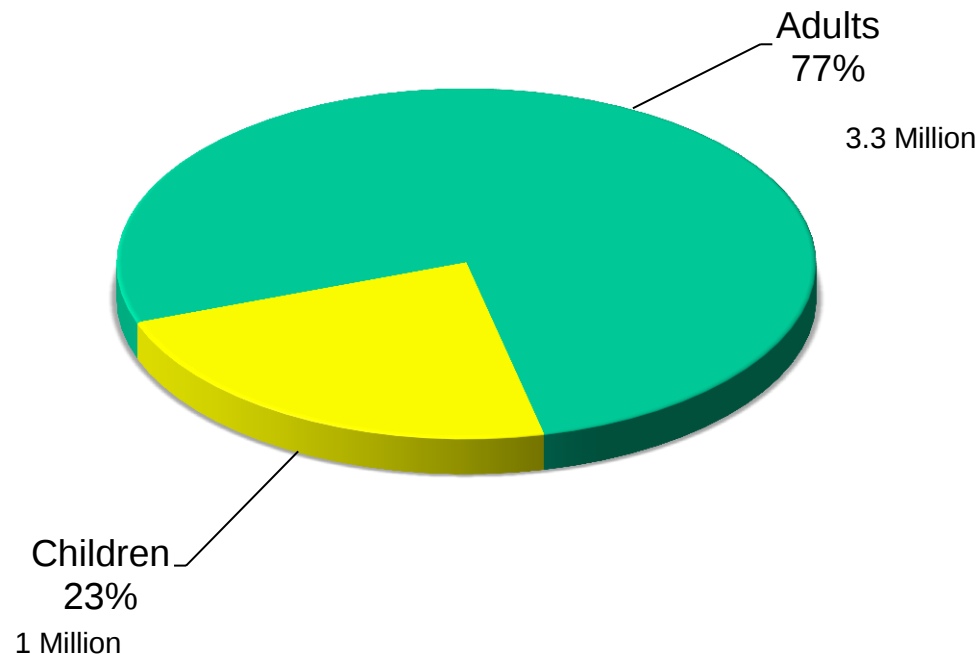


*Includes both adults and children

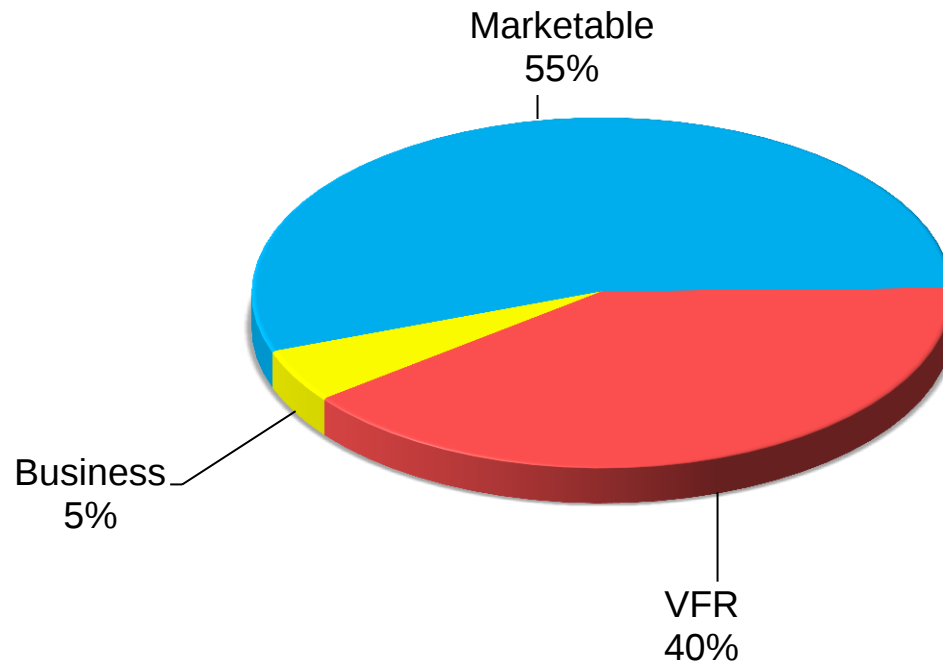
The Central Region's Overnight Travel Market — Adults vs. Children



Total Overnight Trips to the Central Region = 4.3 Million



The Central Region's Overnight Travel Market - by Trip Purpose

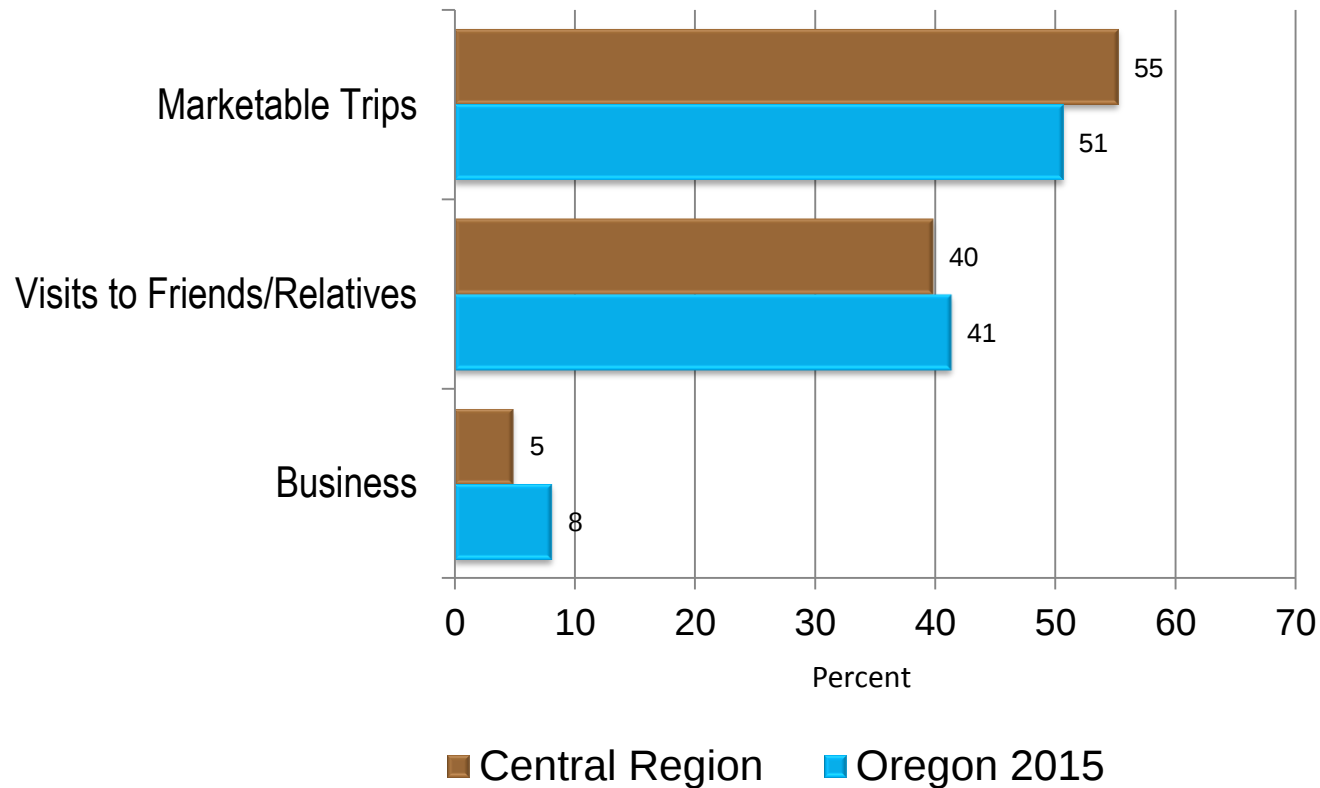


*Marketable includes Business-Leisure

The Central Region vs. Oregon State – by Trip Purpose



Base: 2015 Overnight Trips

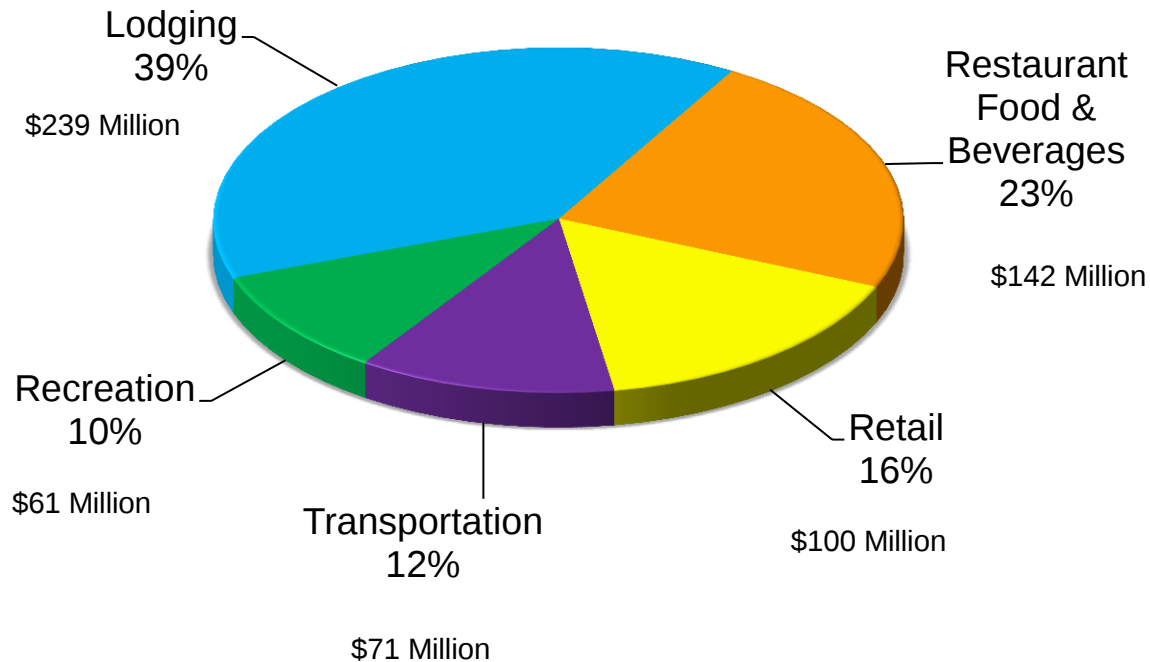


*Marketable includes Business-Leisure

2015 Overnight Spending — by Sector



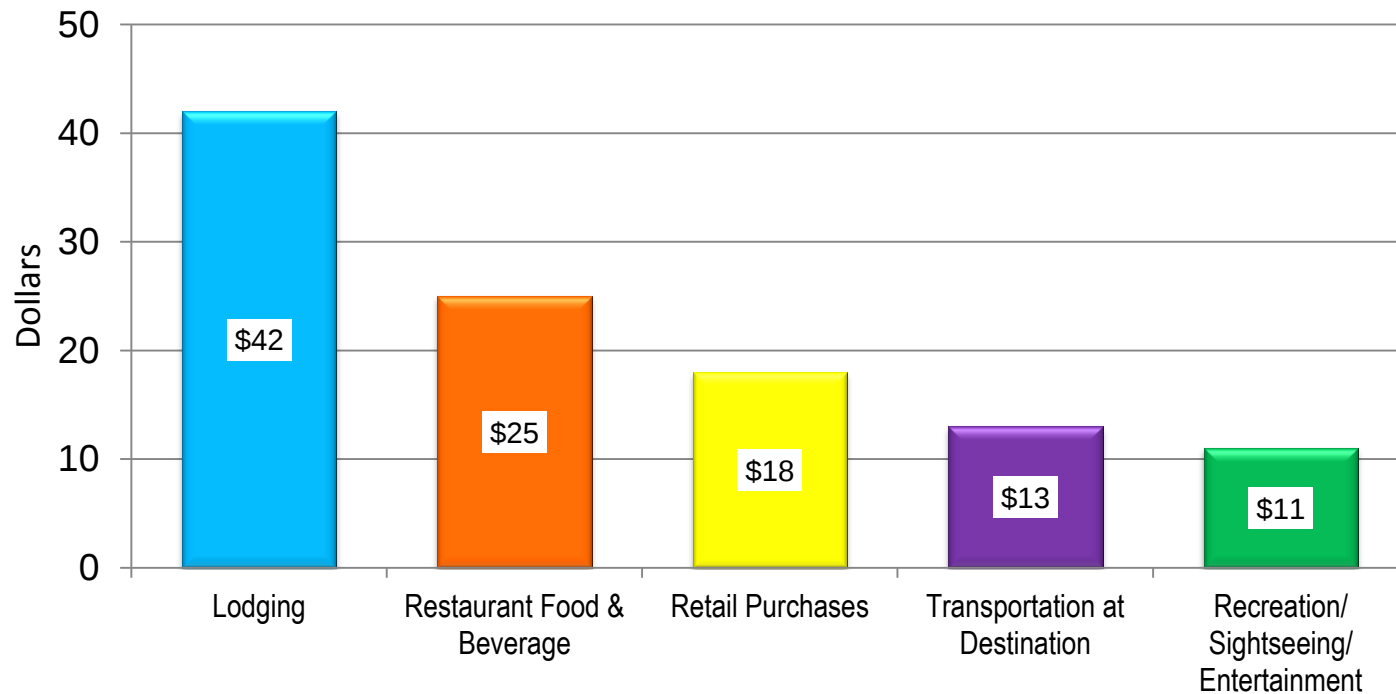
2015 Central Region Spending = \$613 Million



Average Per Person Expenditures on Overnight Trips — By Sector



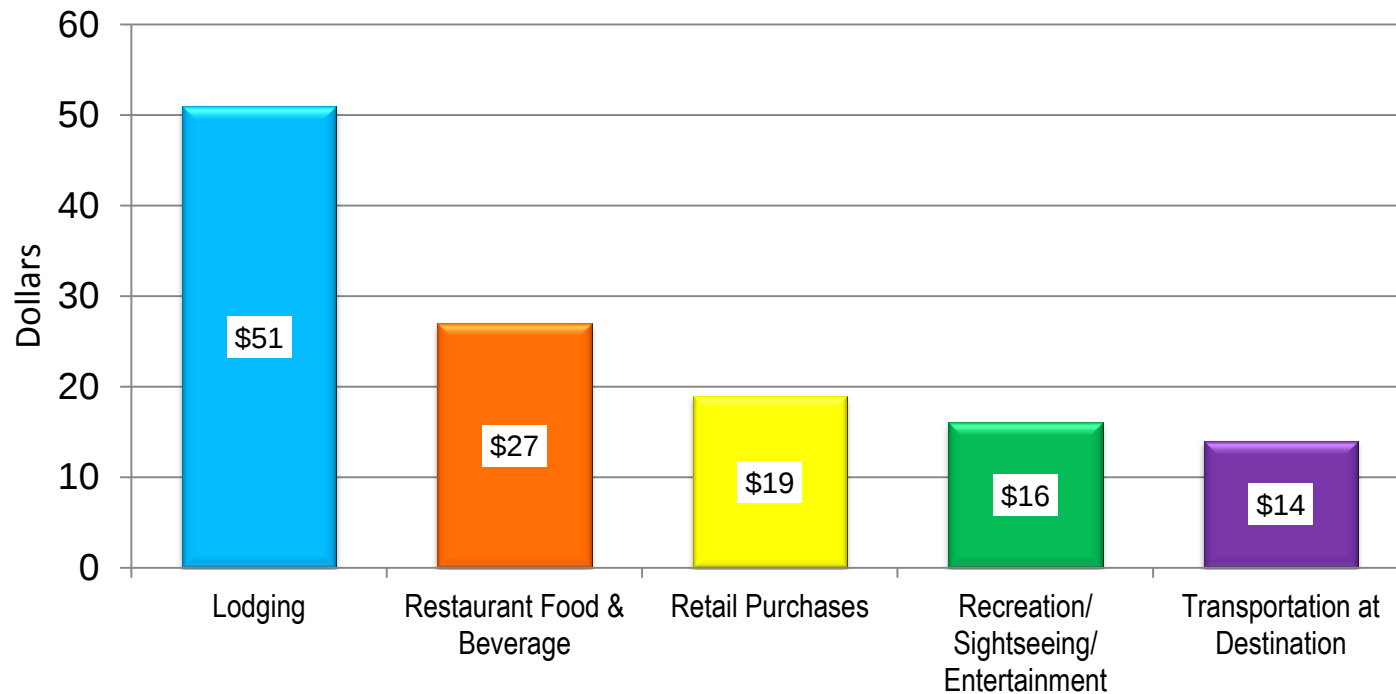
Base: Total Overnight Person-Trips



Average Per Person Expenditures on Overnight Marketable Trips — By Sector



Base: 2015 Overnight Marketable Trips



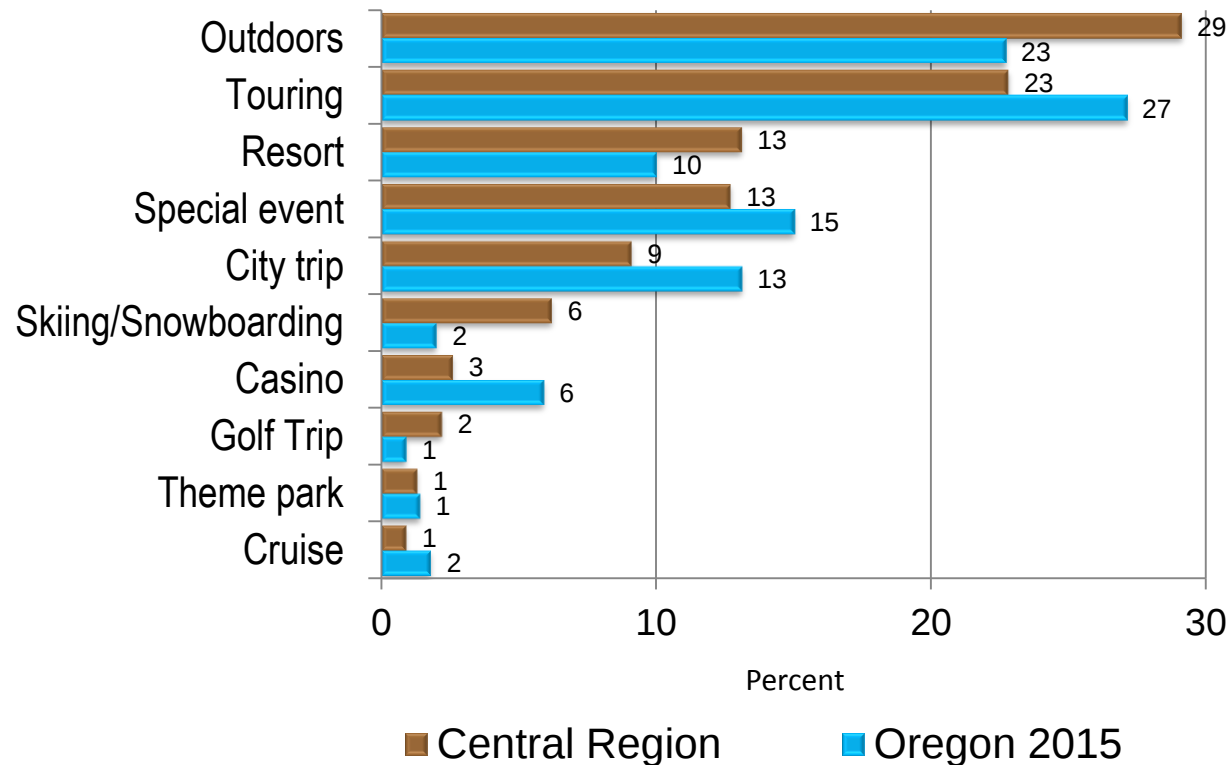


Marketable Trip Characteristics and Visitor Profile – 2014/2015

Main Purpose of Marketable Trip – The Central Region vs. State Norm



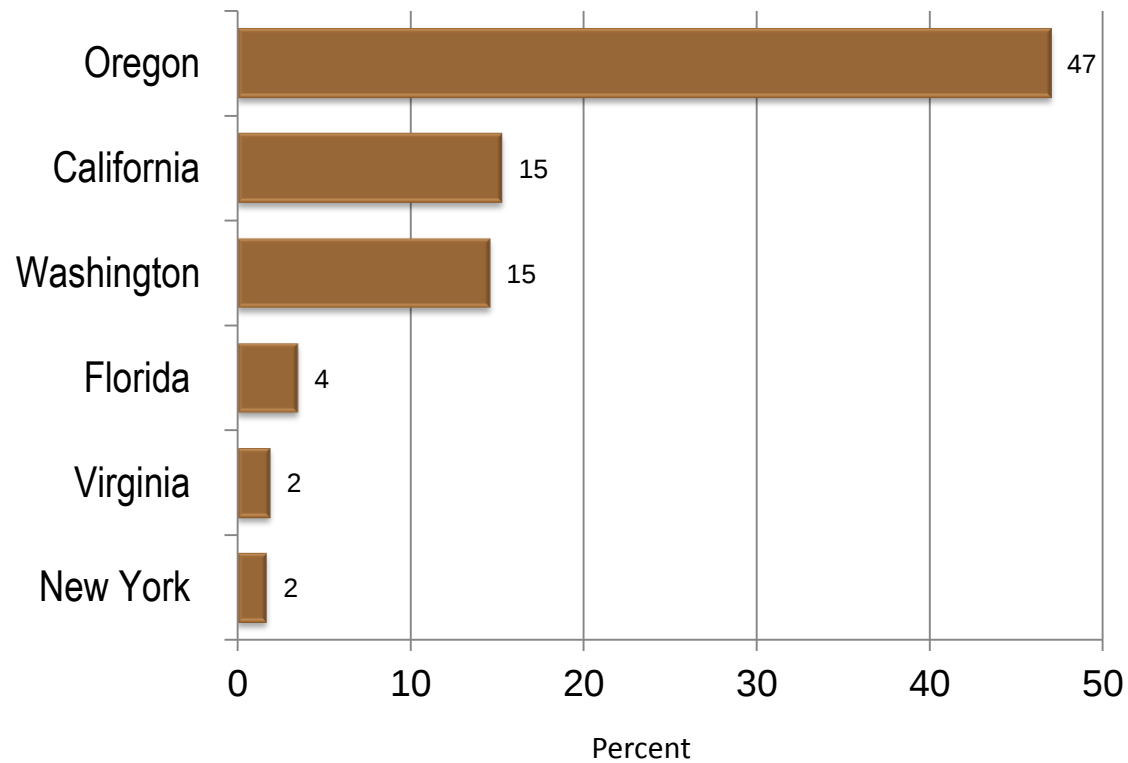
Base: Overnight Marketable Person-Trips



State Origin Of Overnight Trip



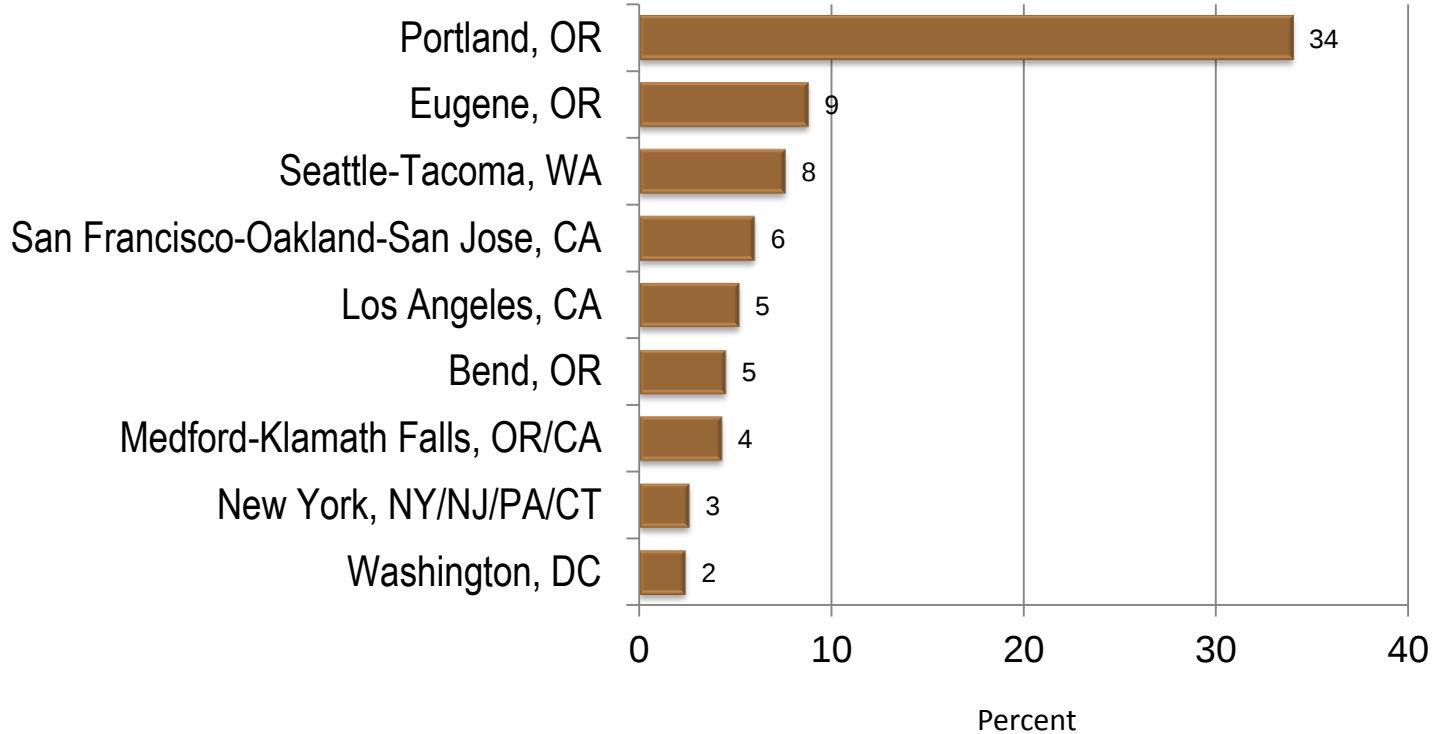
Base: Overnight Marketable Person-Trips



DMA Origin Of Overnight Trip



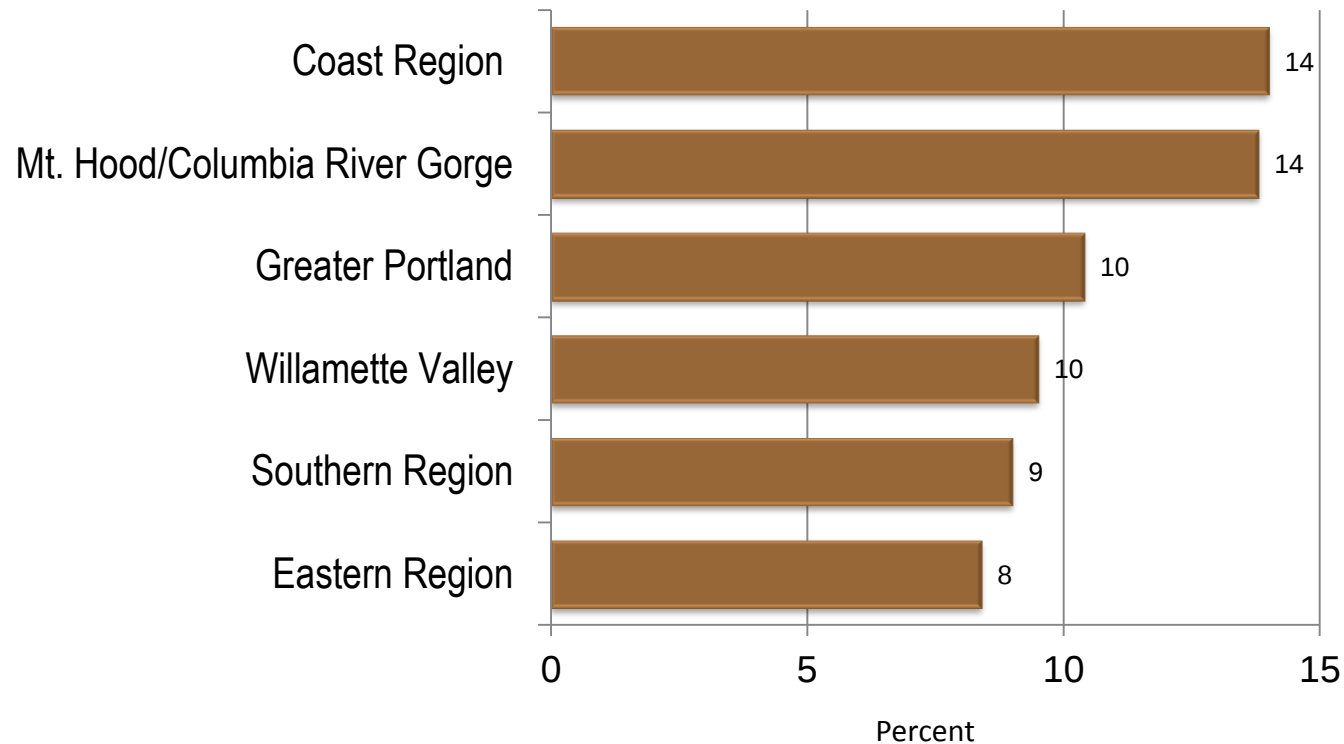
Base: Overnight Marketable Person-Trips



Other Oregon Regions Visited on Central Region Trip



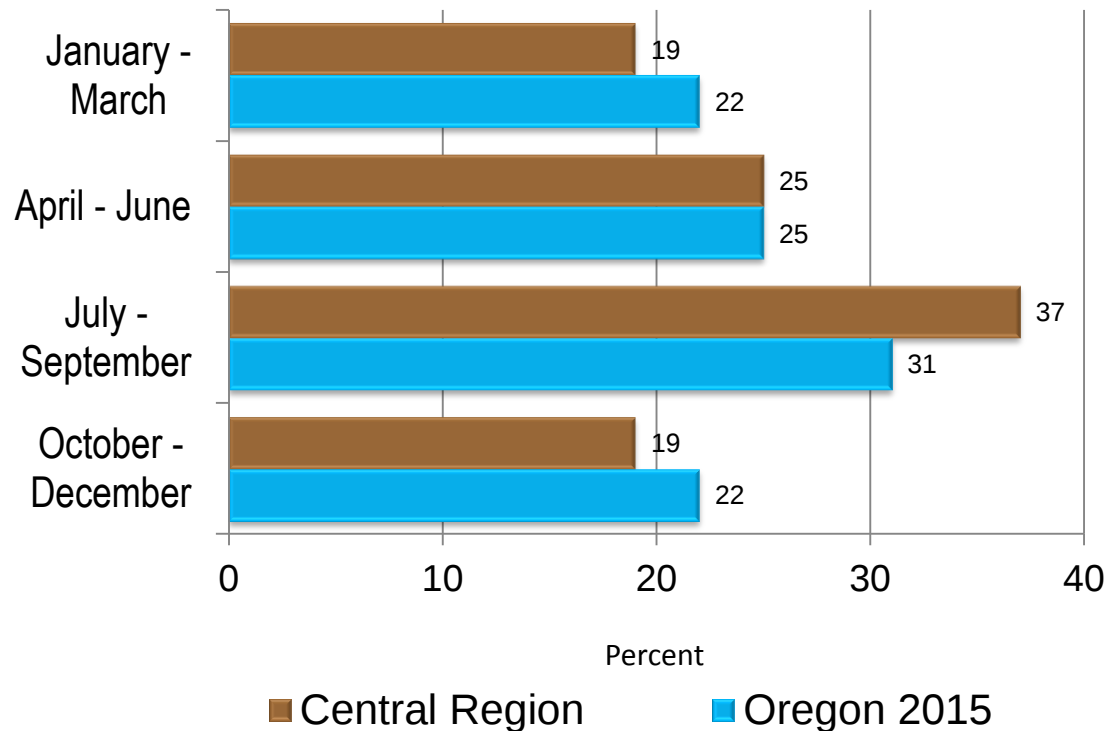
Base: Overnight Marketable Person-Trips



Season of Trip



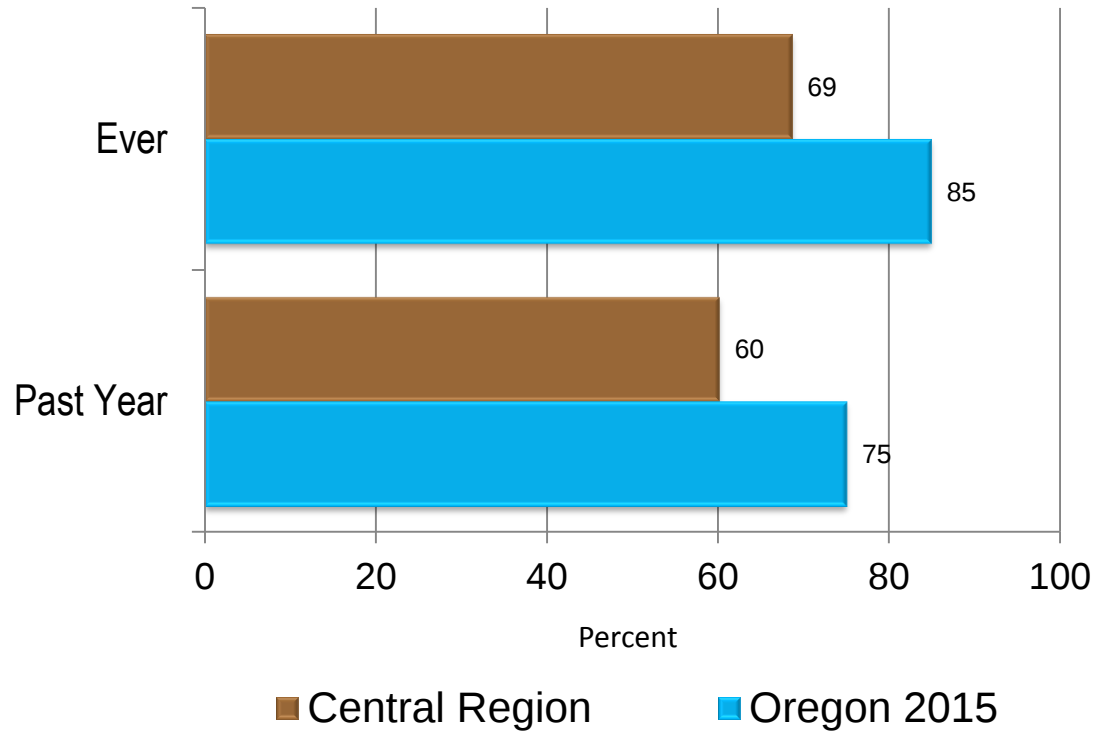
Base: Overnight Marketable Person-Trips



Past Visitation*



Base: Overnight Marketable Person-Trips

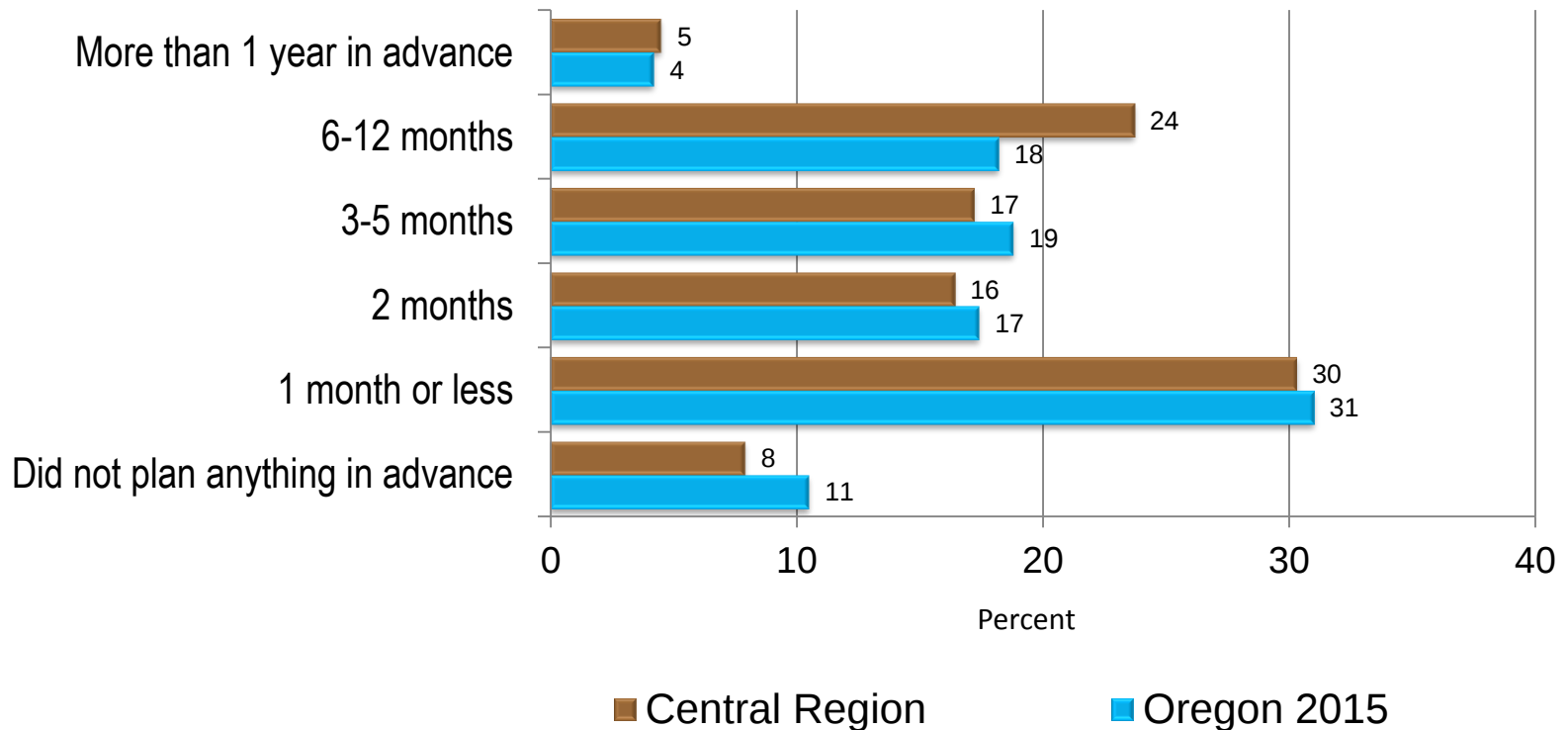


*New in 2015, data is from 2015 only

Length of Trip Planning*



Base: Overnight Marketable Person-Trips

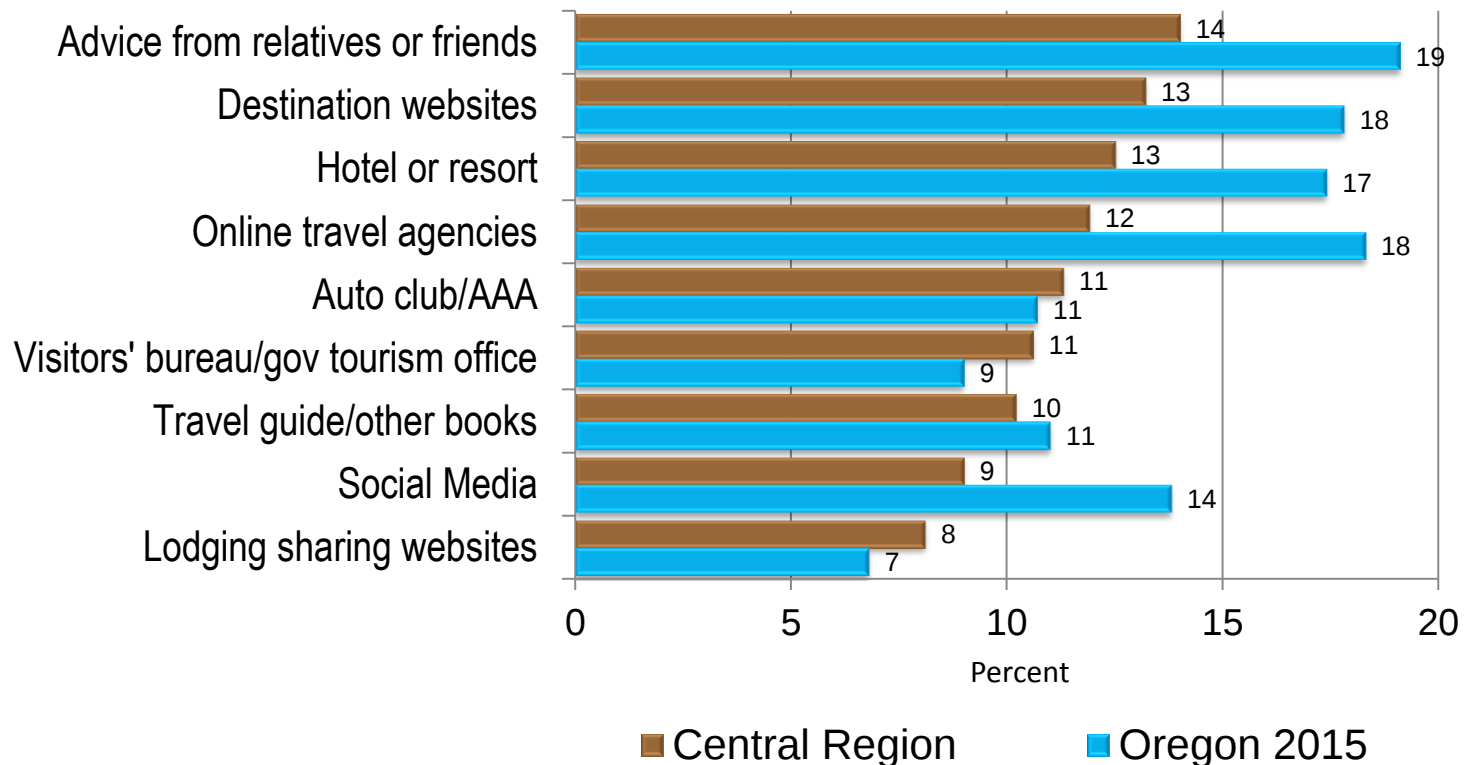


*New in 2015, data is from 2015 only

Trip Planning Information Sources*



Base: Overnight Marketable Person-Trips

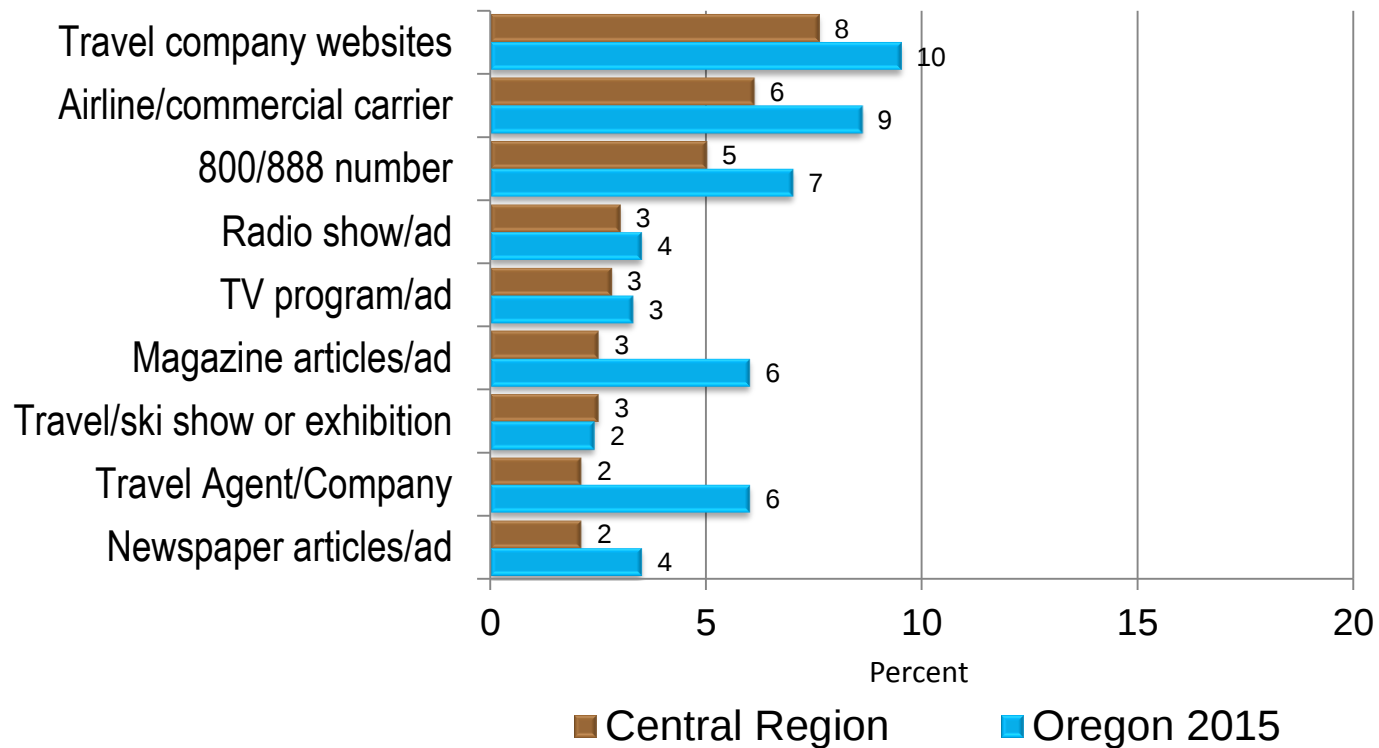


*New in 2015, data is from 2015 only

Trip Planning Information Sources* (Cont'd)



Base: Overnight Marketable Person-Trips

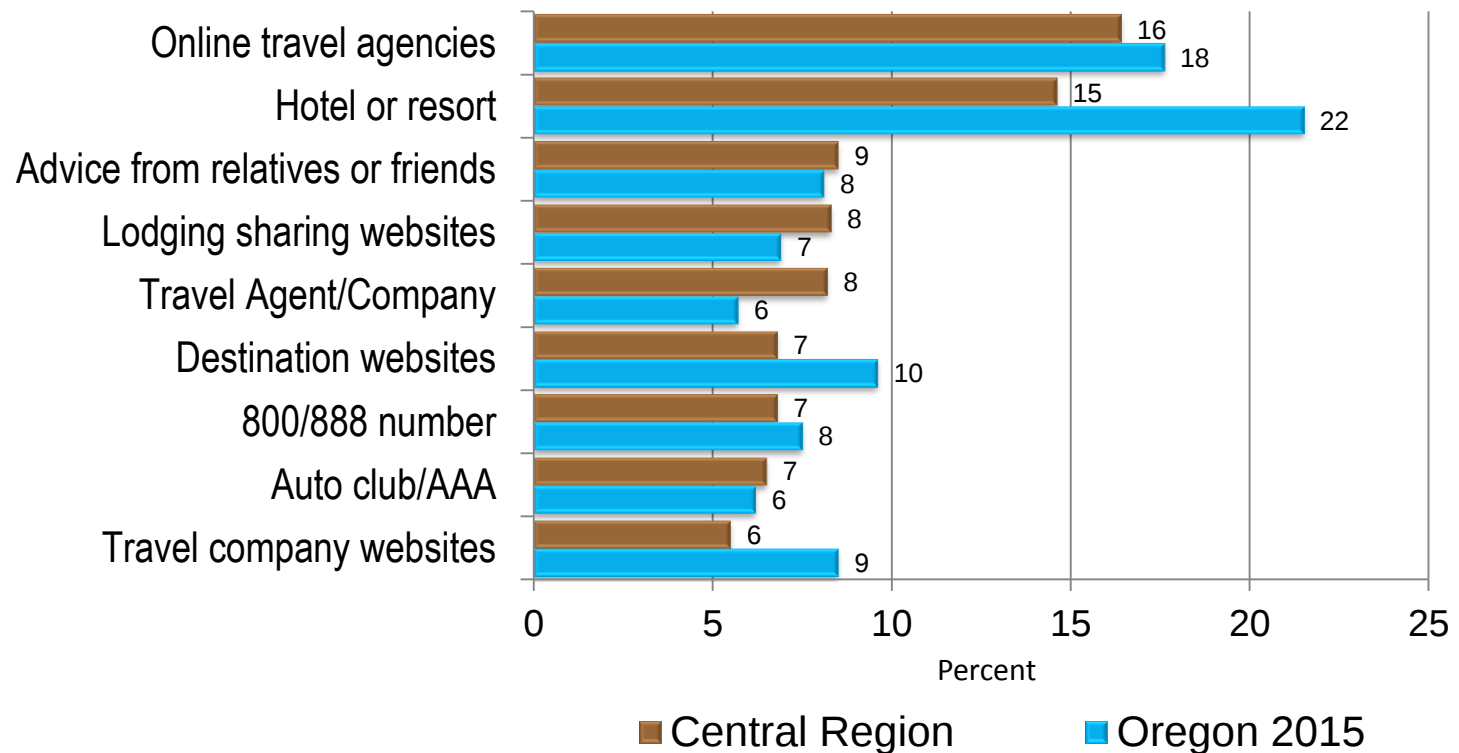


*New in 2015, data is from 2015 only

Method of Booking Trip*



Base: Overnight Marketable Person-Trips

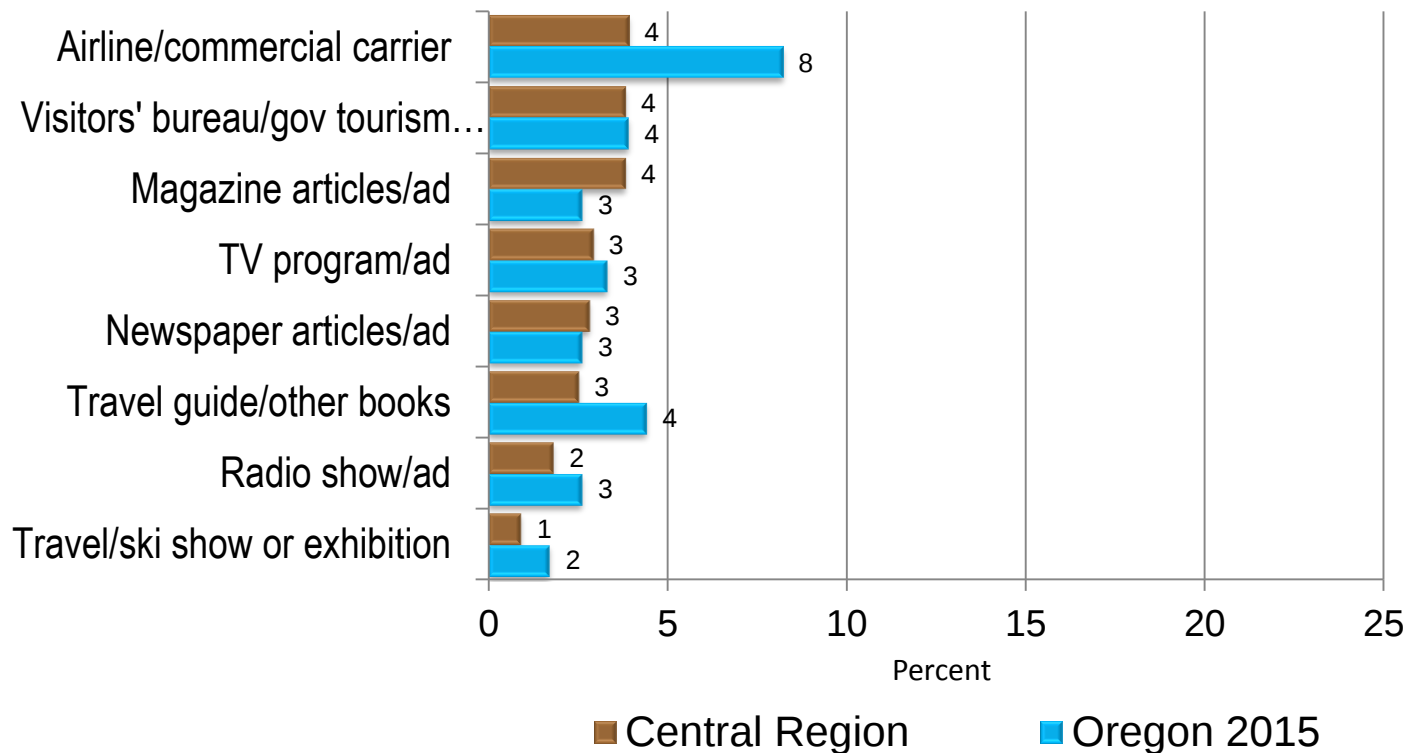


*New in 2015, data is from 2015 only

Method of Booking Trip* (Cont'd)



Base: Overnight Marketable Person-Trips

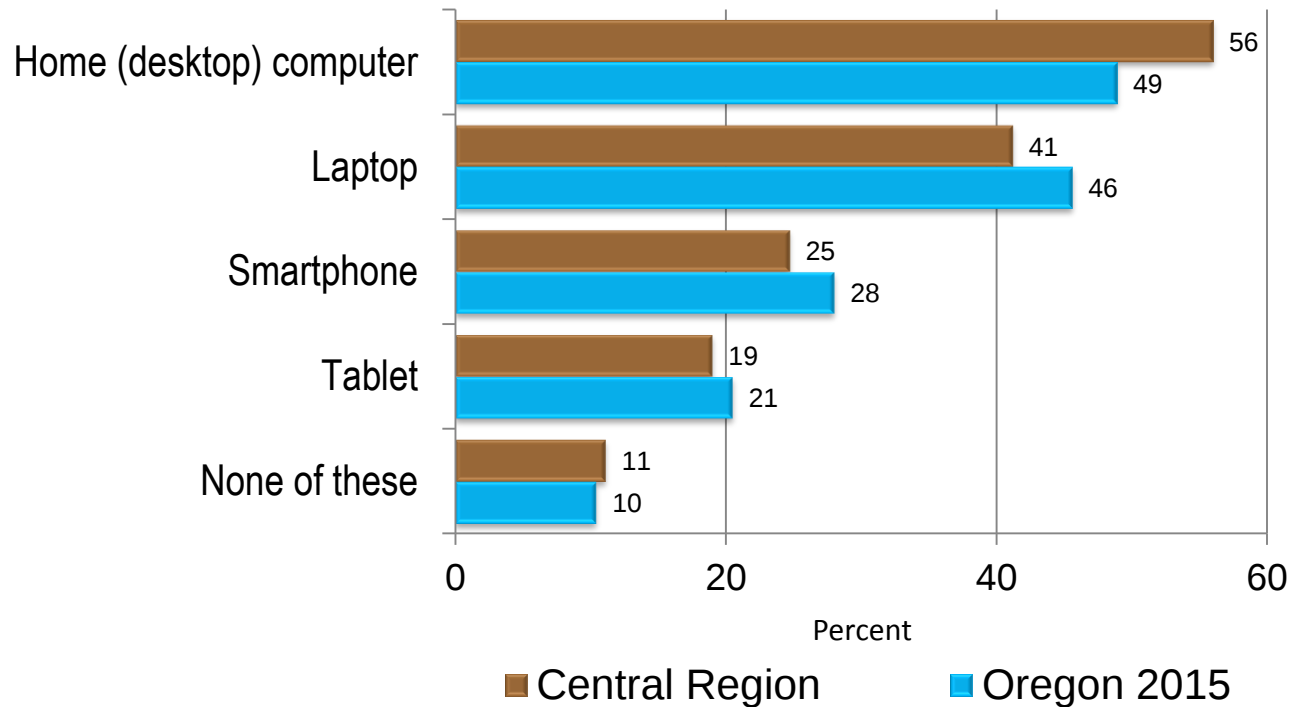


*New in 2015, data is from 2015 only

Devices Used for Trip Planning*



Base: Overnight Marketable Person-Trips

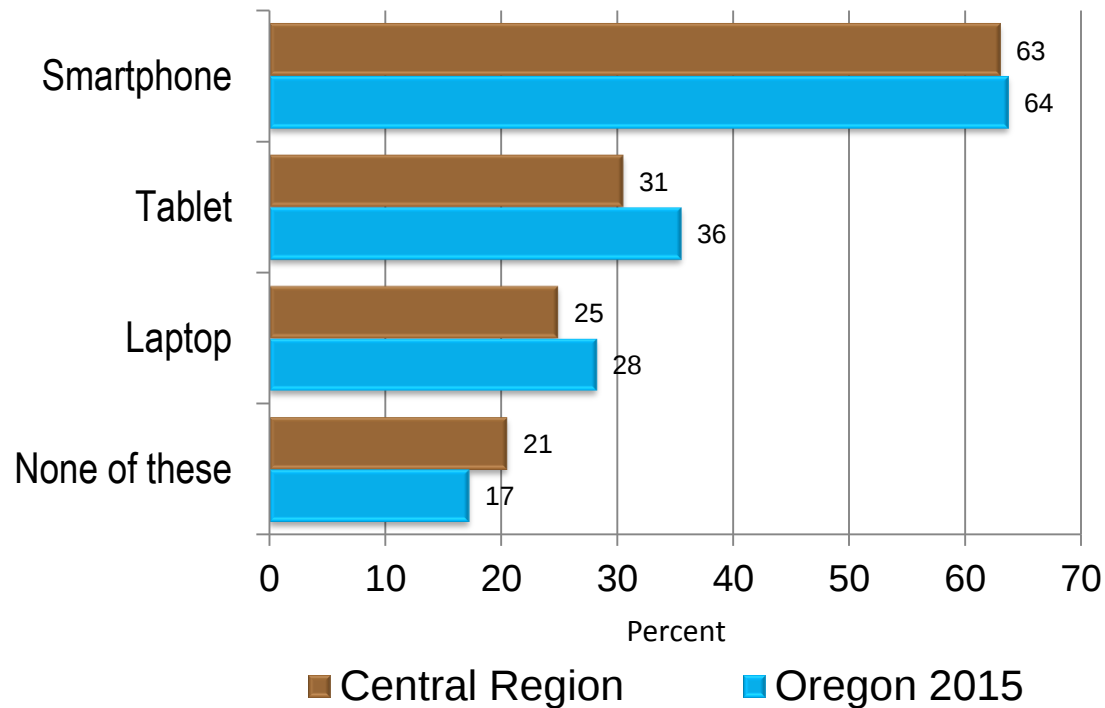


*New in 2015, data is from 2015 only

Devices Used During Trip*



Base: Overnight Marketable Person-Trips



*New in 2015, data is from 2015 only

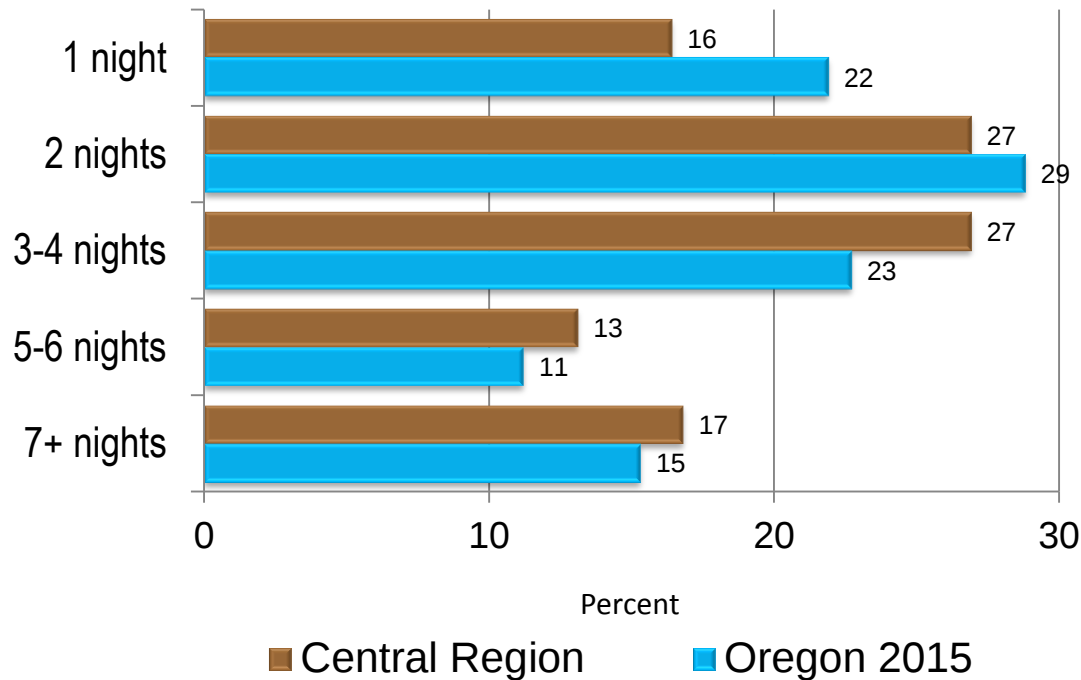
Total Nights Away on Trip



Base: Overnight Marketable Person-Trips

Average
Central Region
= 4.0 Nights

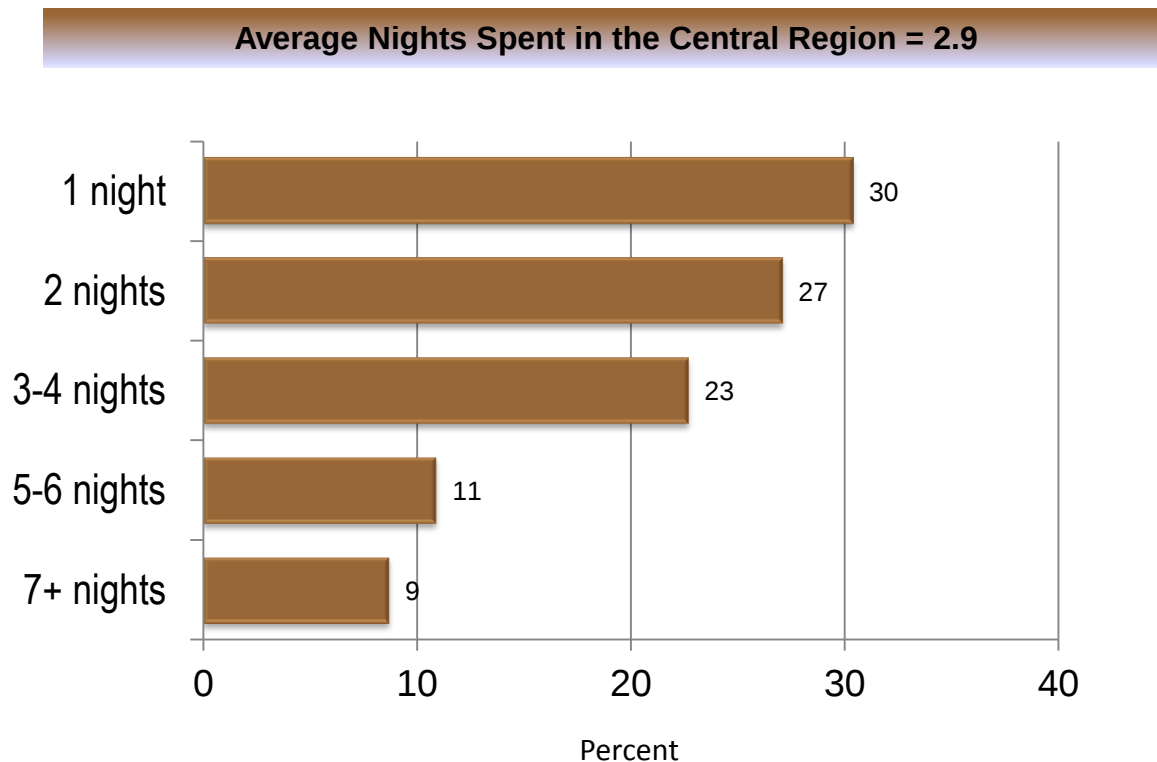
Average
Oregon
= 4.3 Nights



Number of Nights Spent in the Central Region



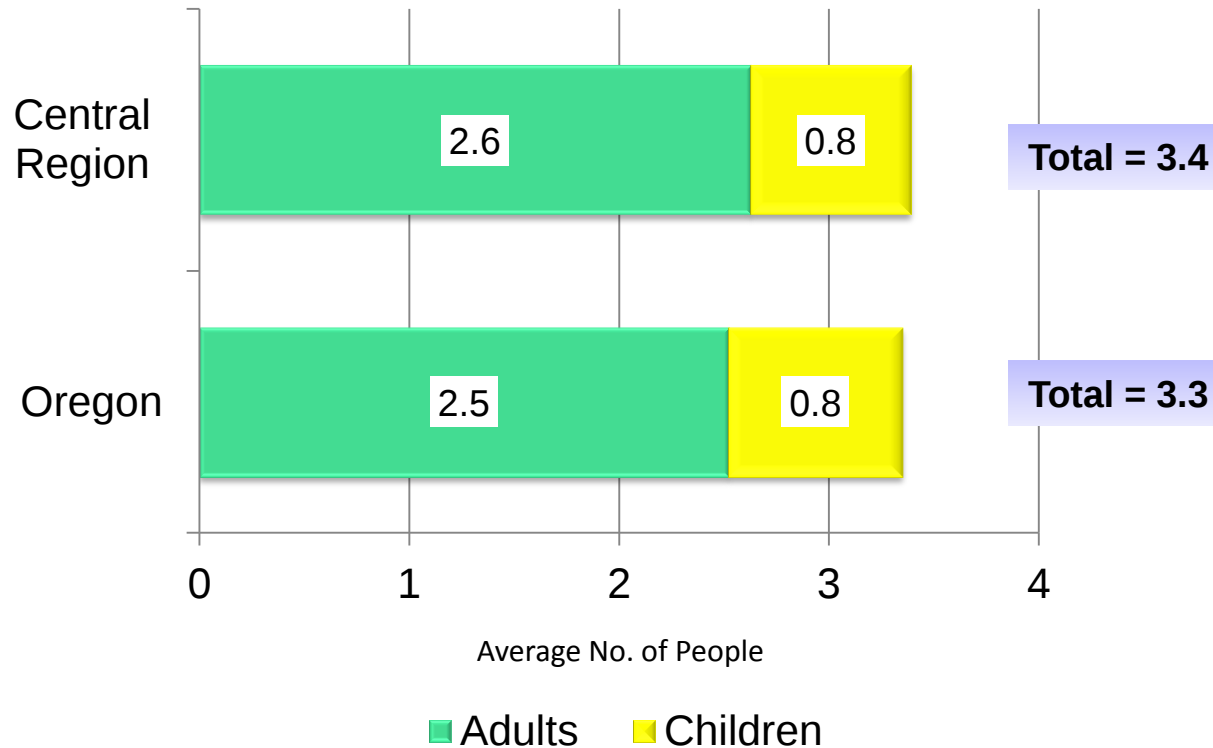
Base: Overnight Marketable Person-Trips with 1+ Nights Spent in the Central Region



Size of Travel Party



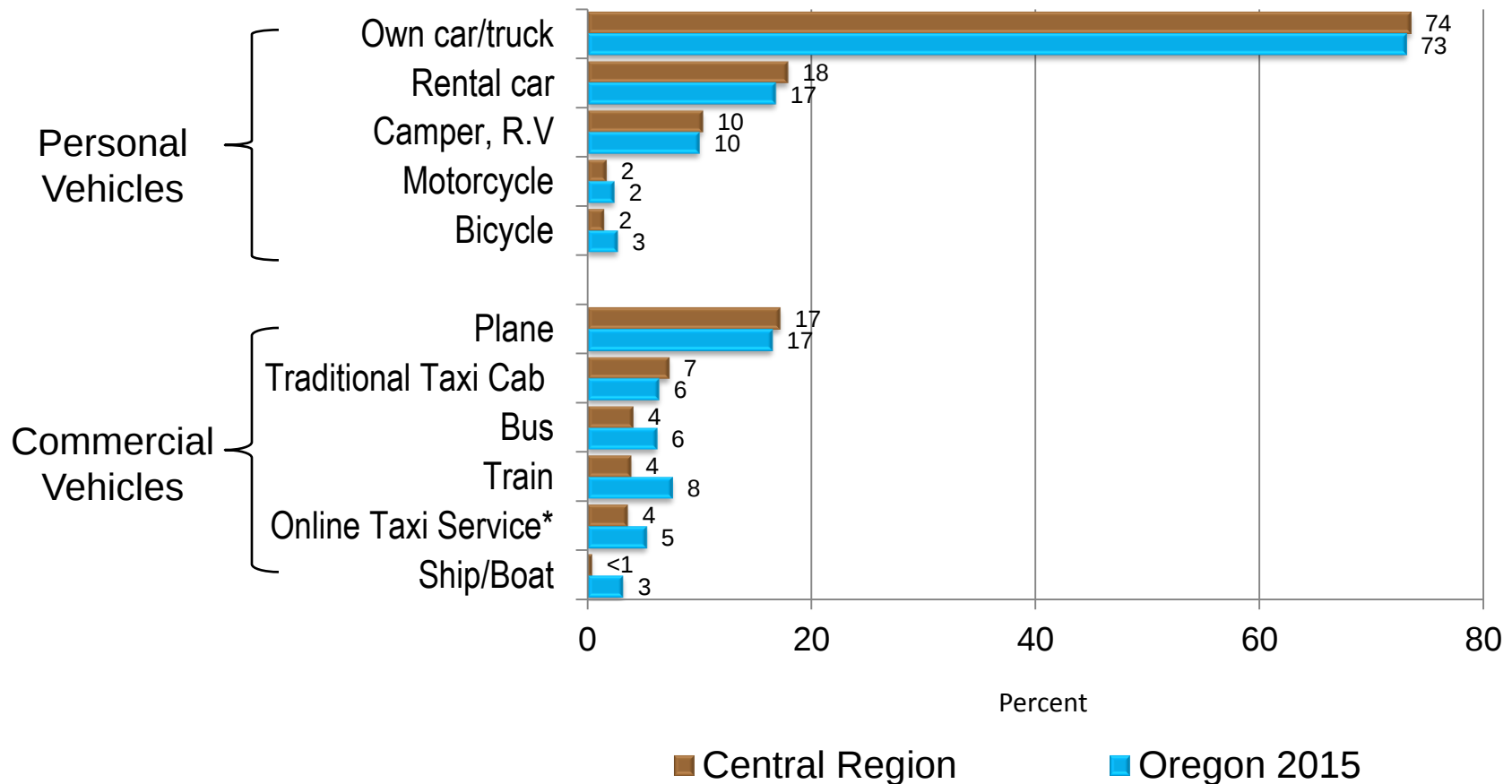
Base: Overnight Marketable Person-Trips



Transportation



Base: Overnight Marketable Person-Trips

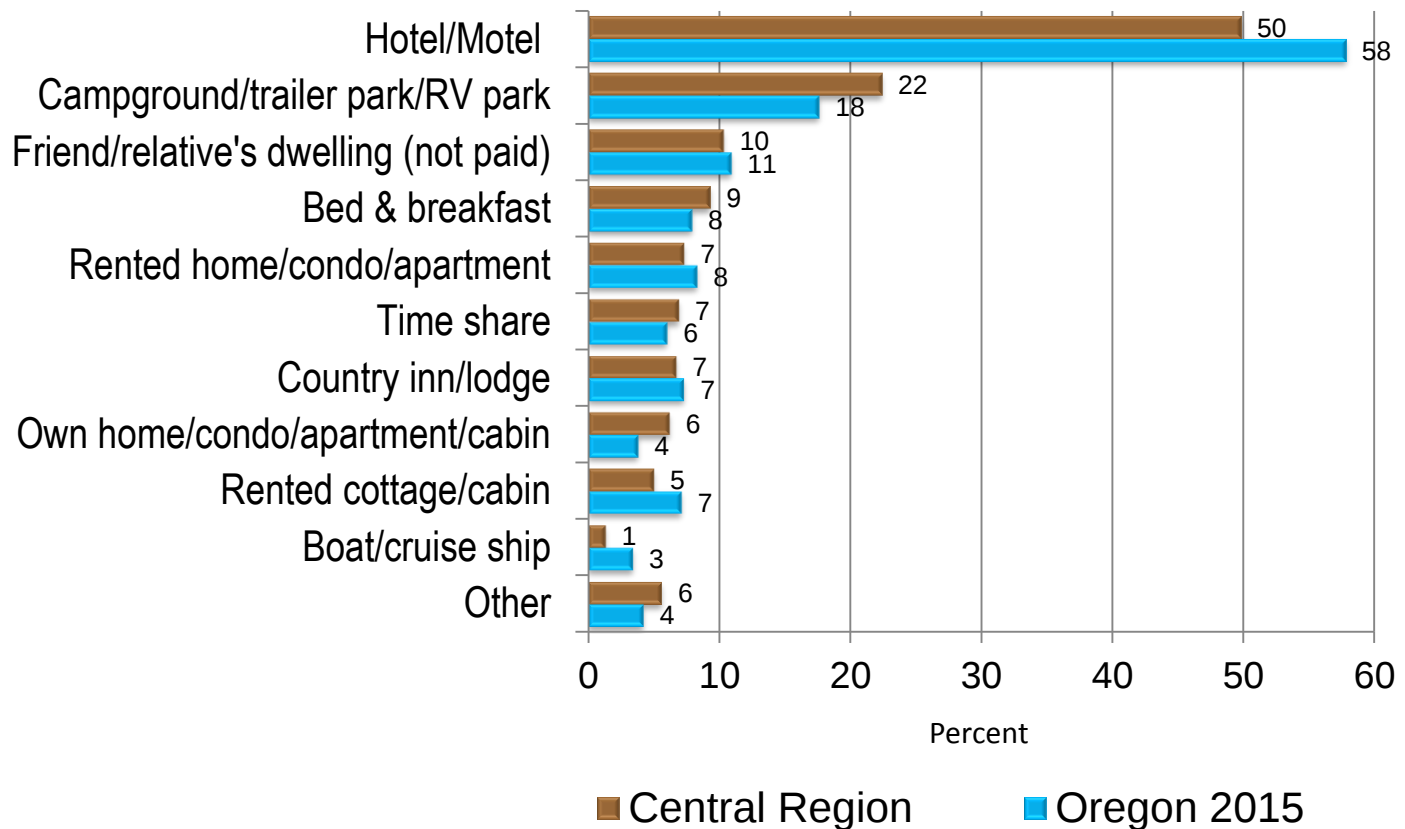


*Category added in 2015, data is from 2015 only

Accommodation



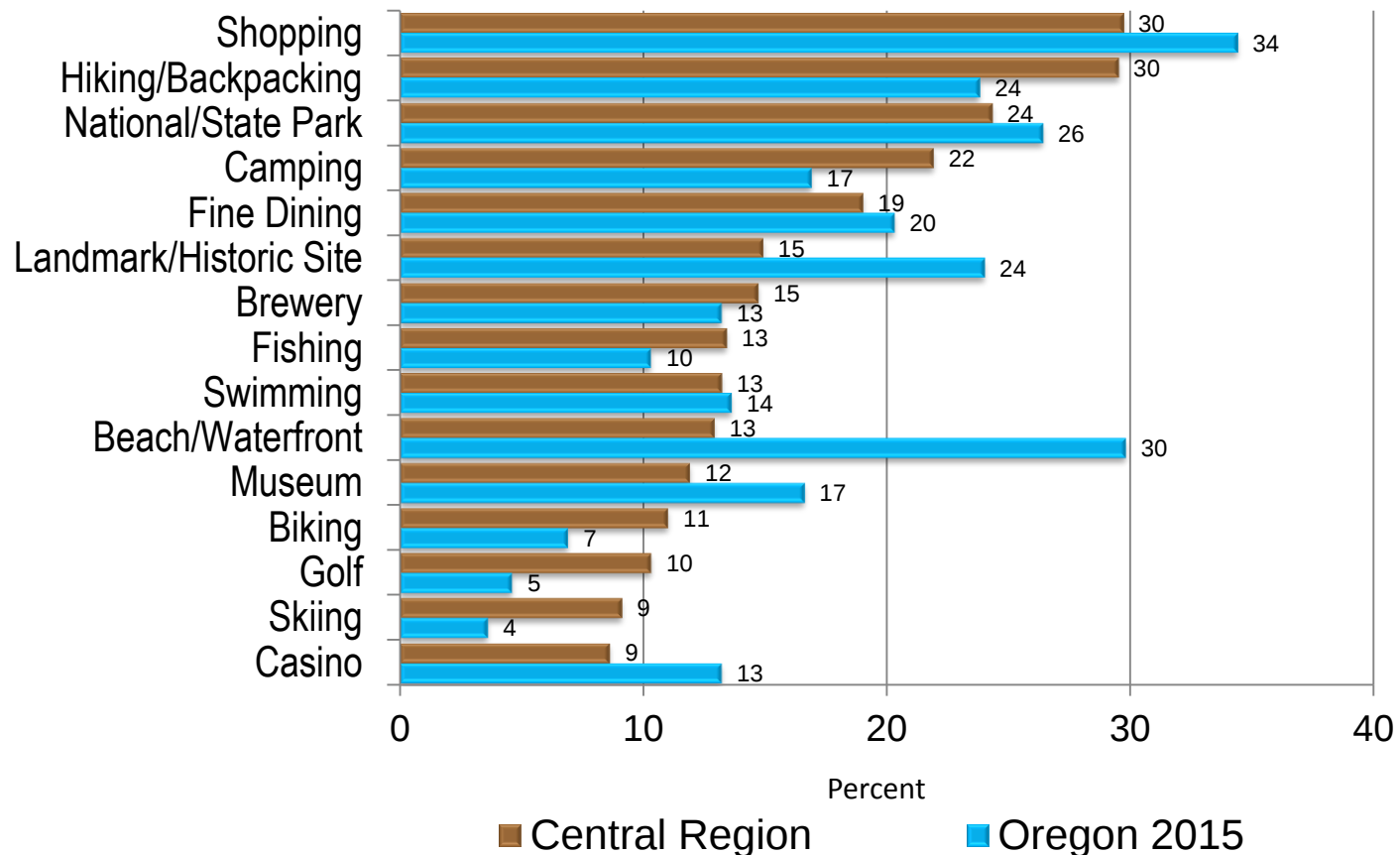
Base: Overnight Marketable Person-Trips



Activities and Experiences



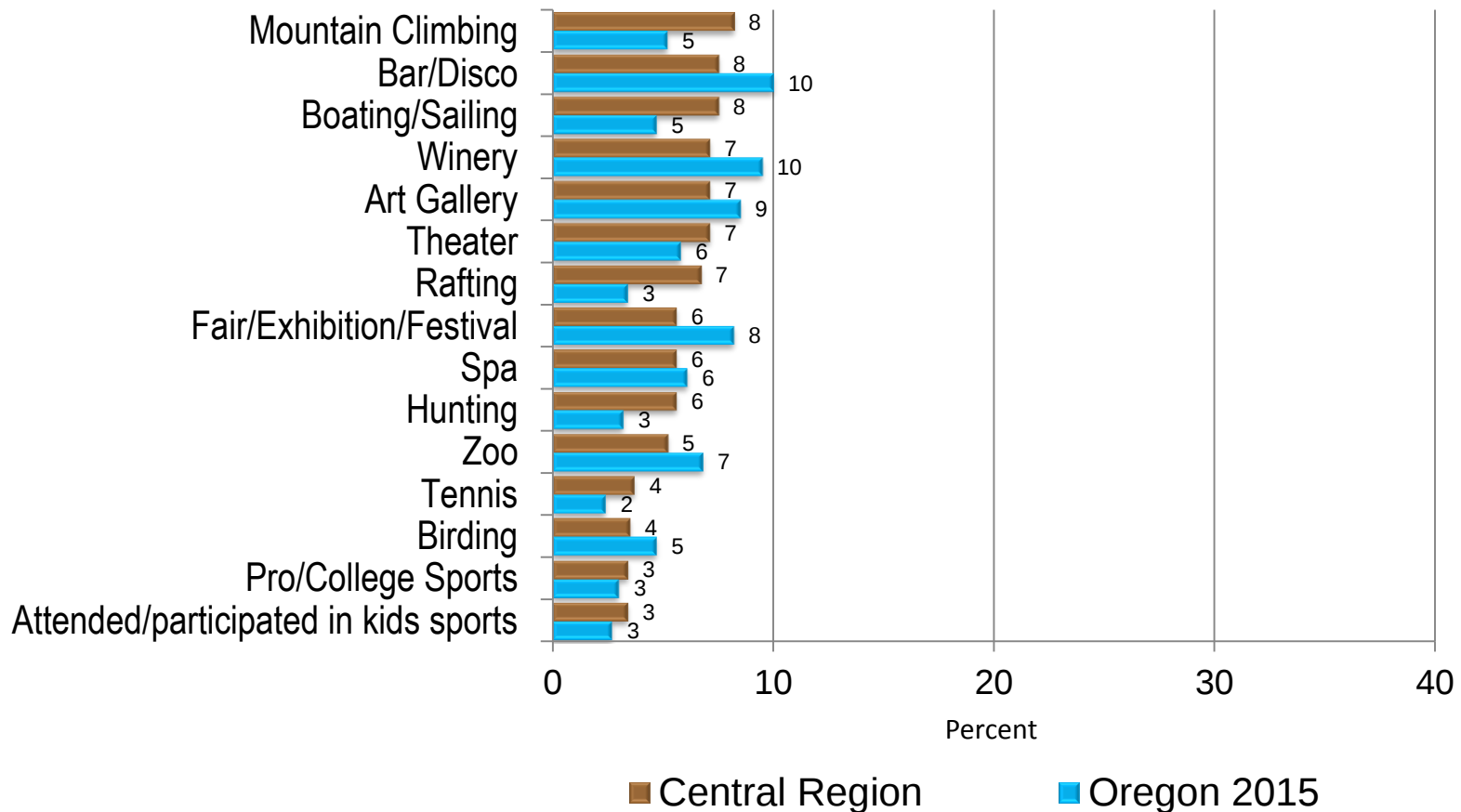
Base: Overnight Marketable Person-Trips



Activities and Experiences



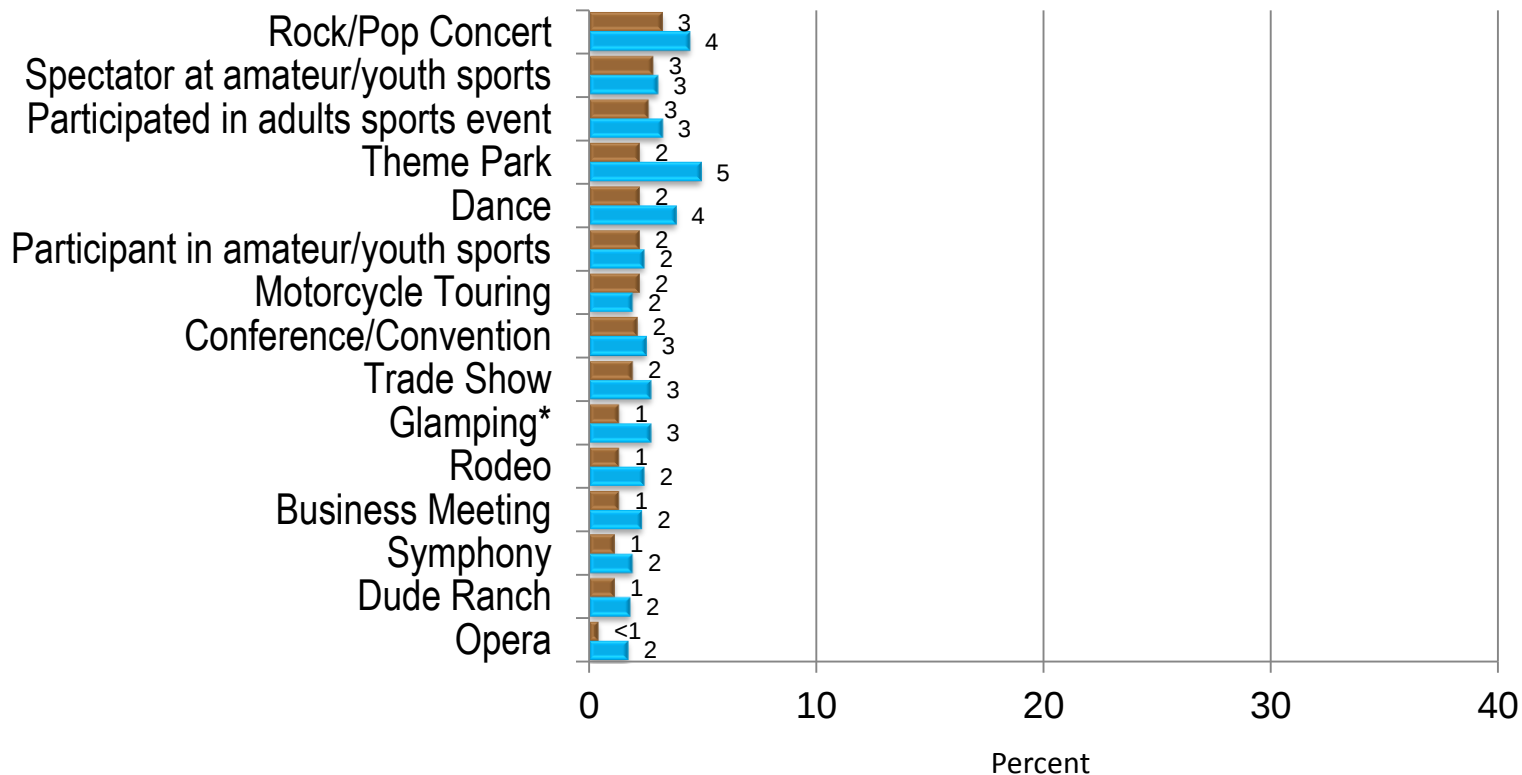
Base: Overnight Marketable Person-Trips



Activities and Experiences



Base: Overnight Marketable Person-Trips



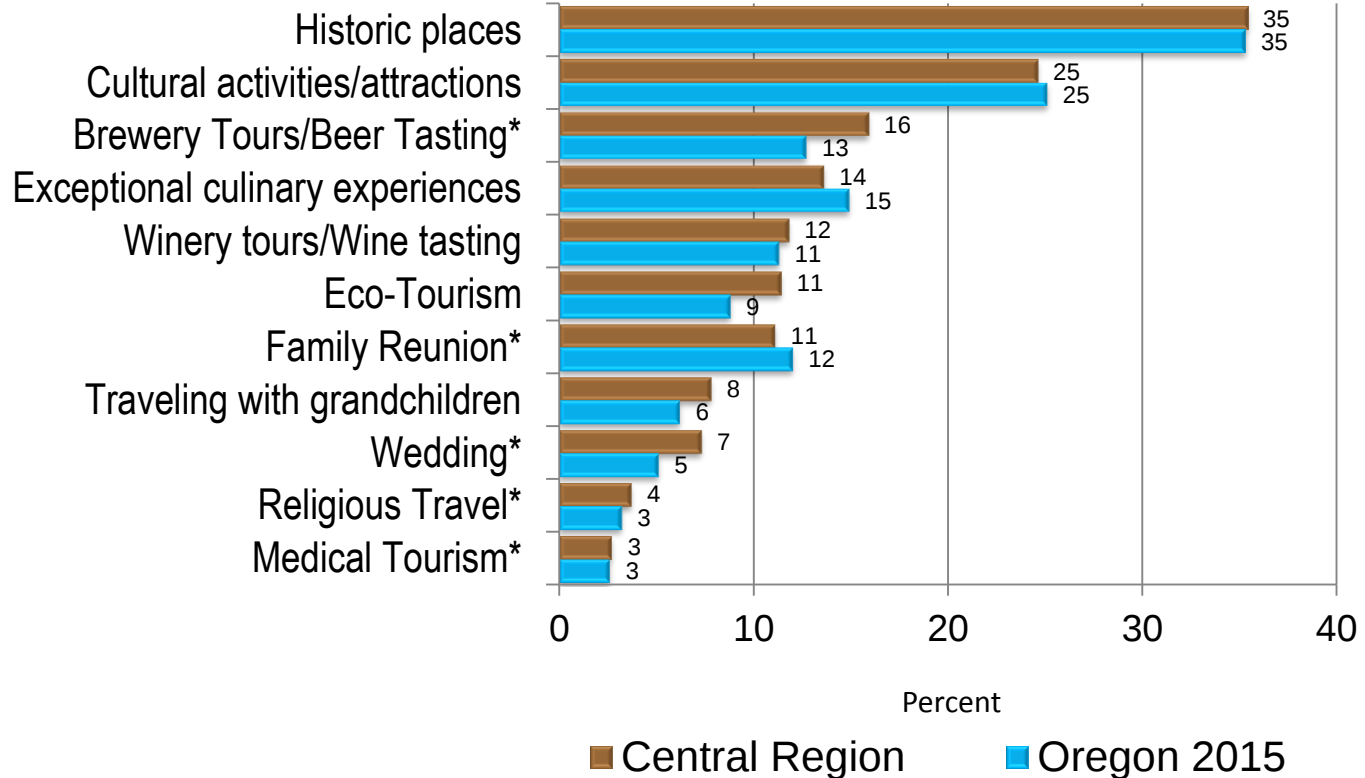
■ Central Region

■ Oregon 2015

Activities of Special Interest



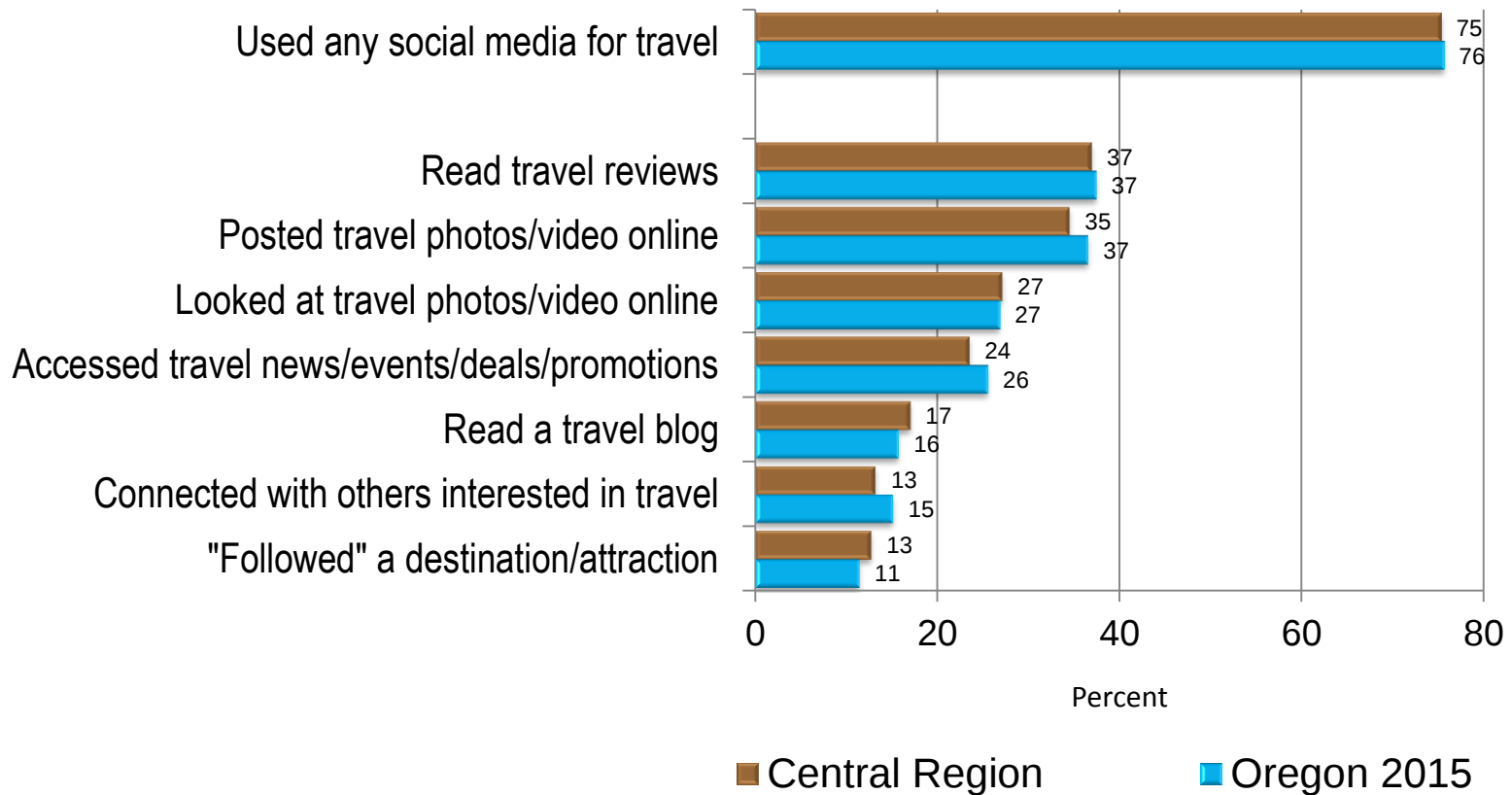
Base: Overnight Marketable Person-Trips



Online Social Media Use by Travelers



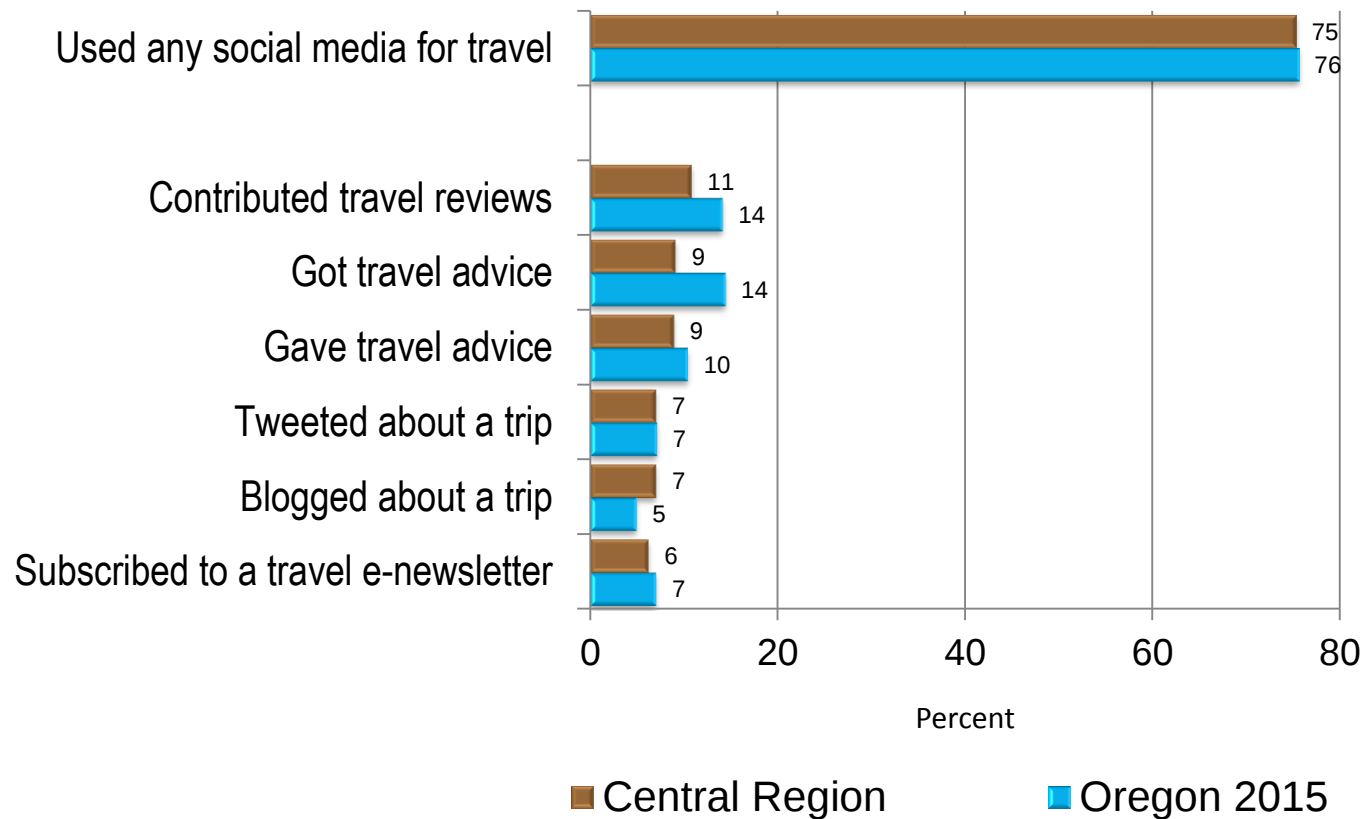
Base: Overnight Marketable Person-Trips



Online Social Media Use by Travelers (Cont'd)



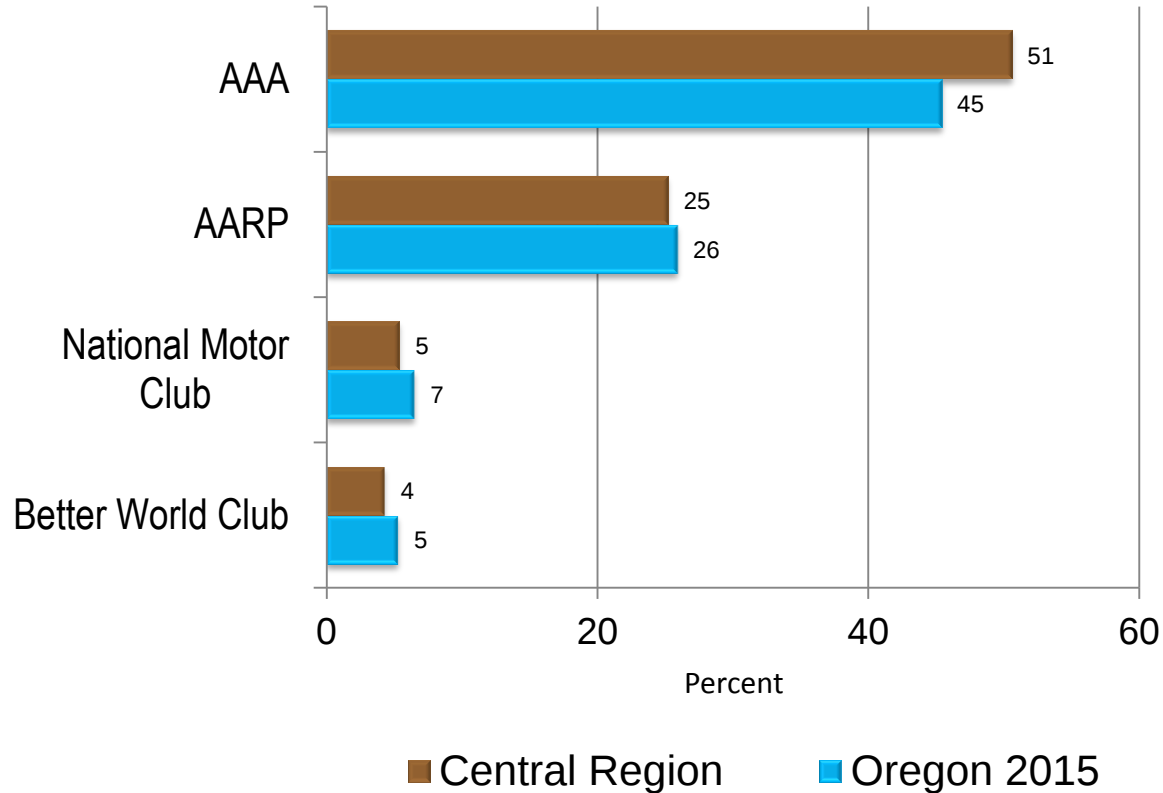
Base: Overnight Marketable Person-Trips



Organization Membership



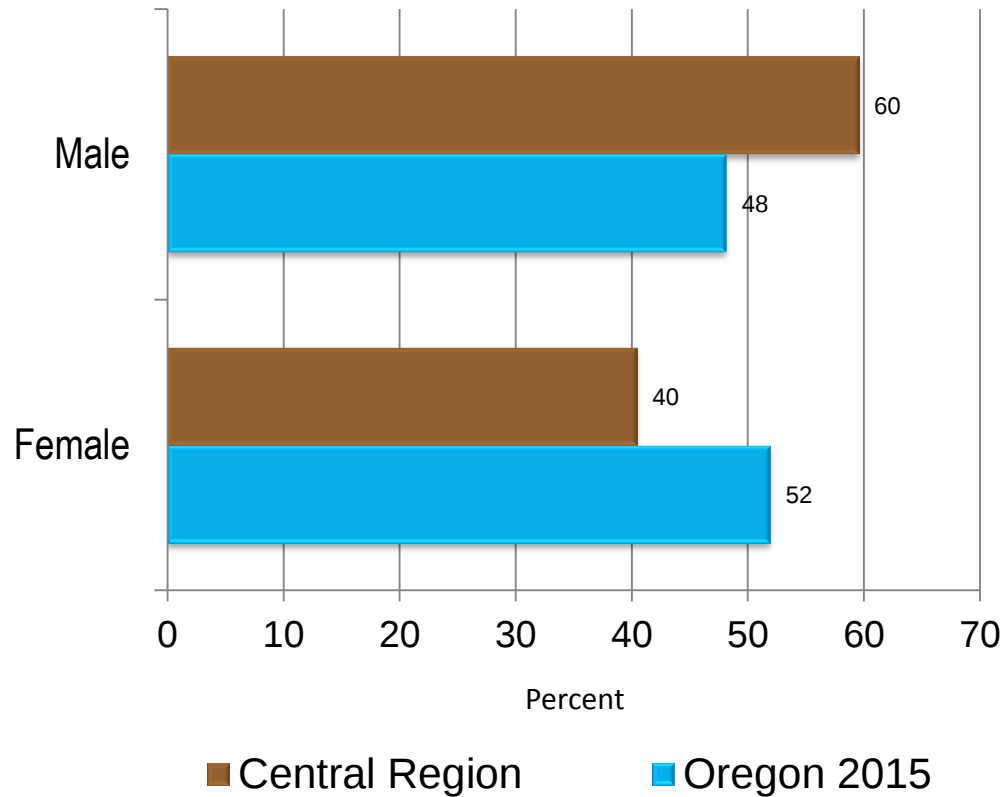
Base: Overnight Marketable Person-Trips



Gender



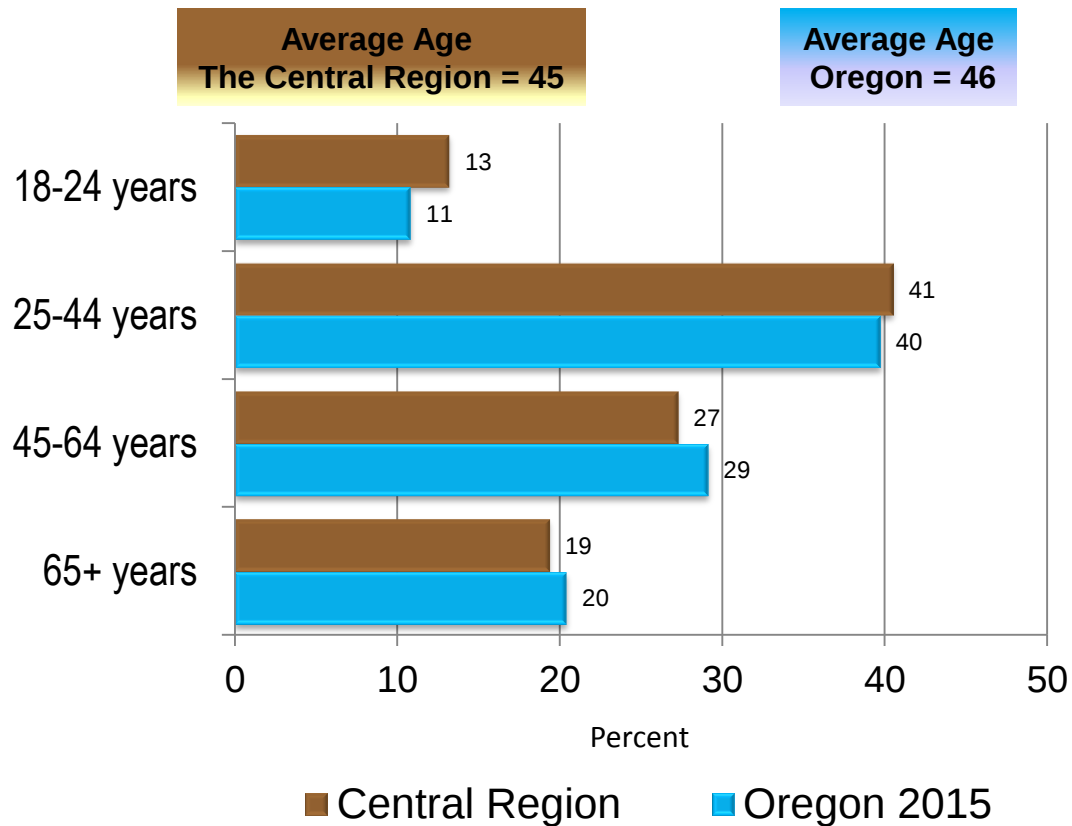
Base: Overnight Marketable Person-Trips



Age



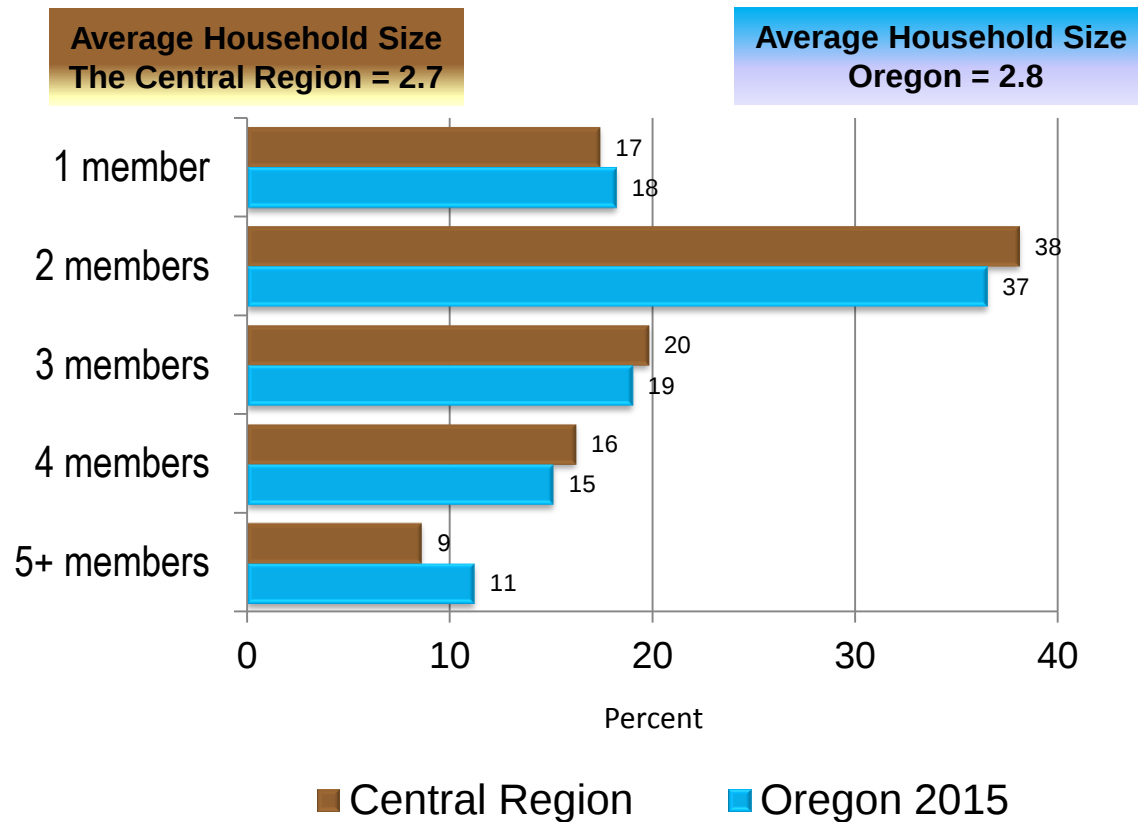
Base: Overnight Marketable Person-Trips



Household Size



Base: Overnight Marketable Person-Trips



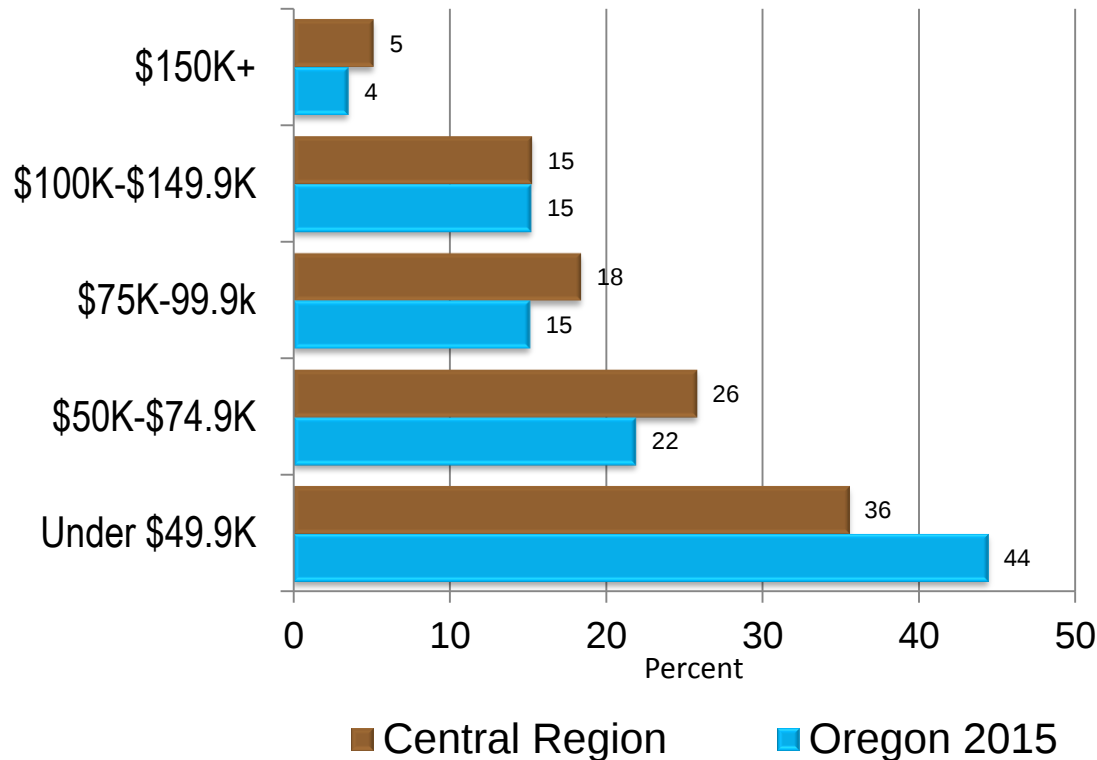
Household Income



Base: Overnight Marketable Person-Trips

Average Household Income
The Central Region = \$72.3K

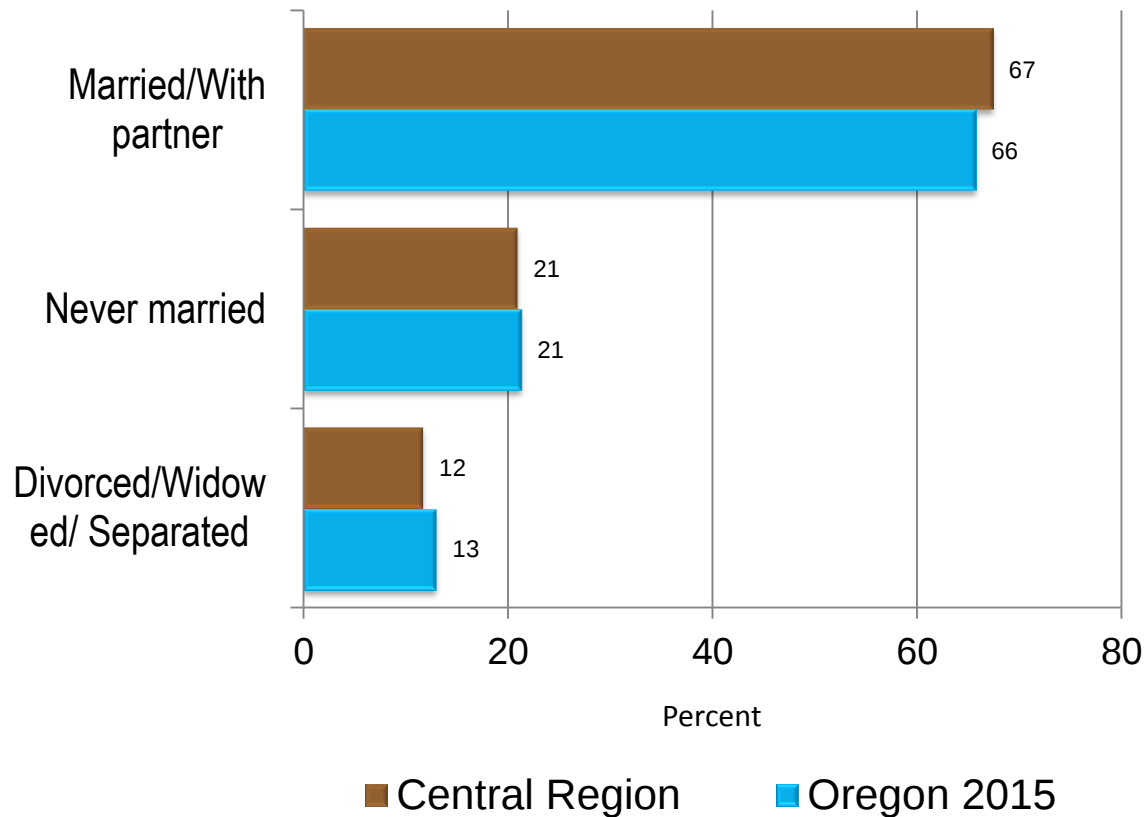
Average Household Income
Oregon = \$63.7K



Marital Status



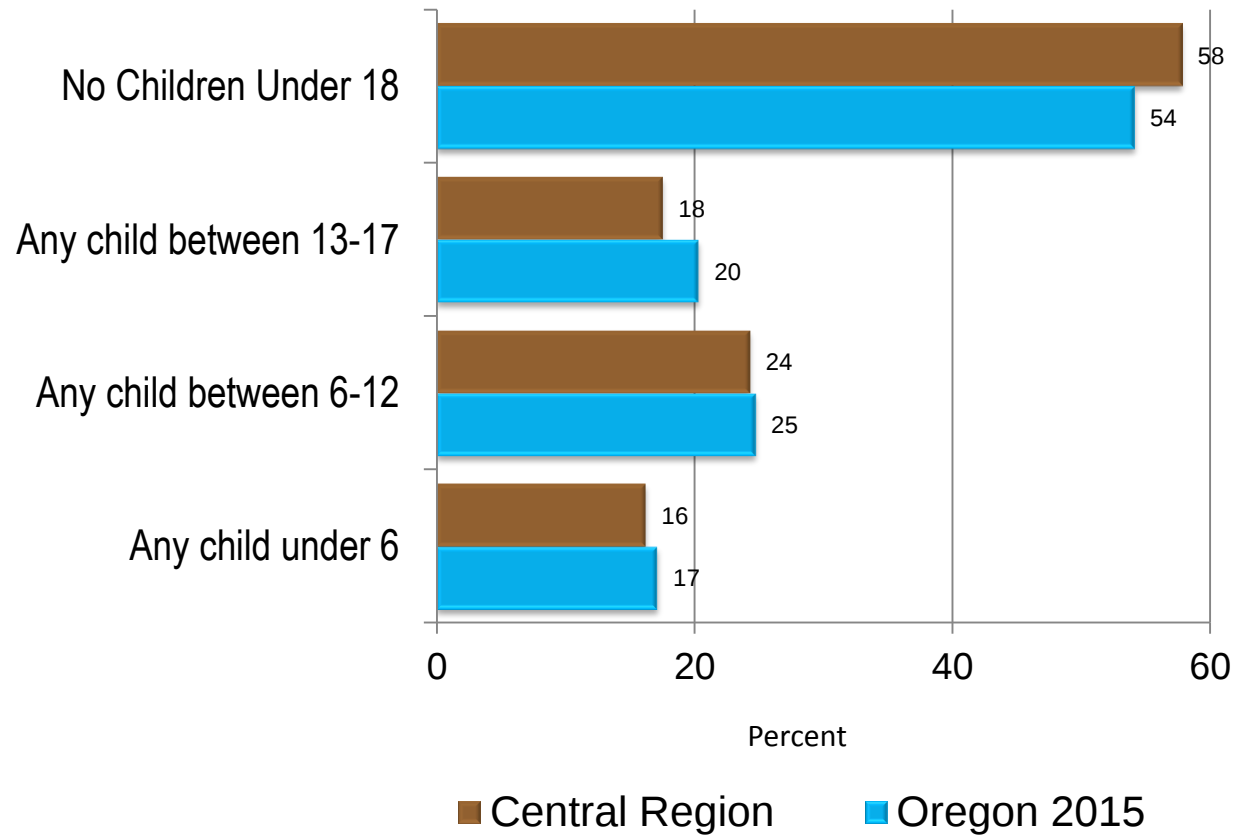
Base: Overnight Marketable Person-Trips



Children in Household



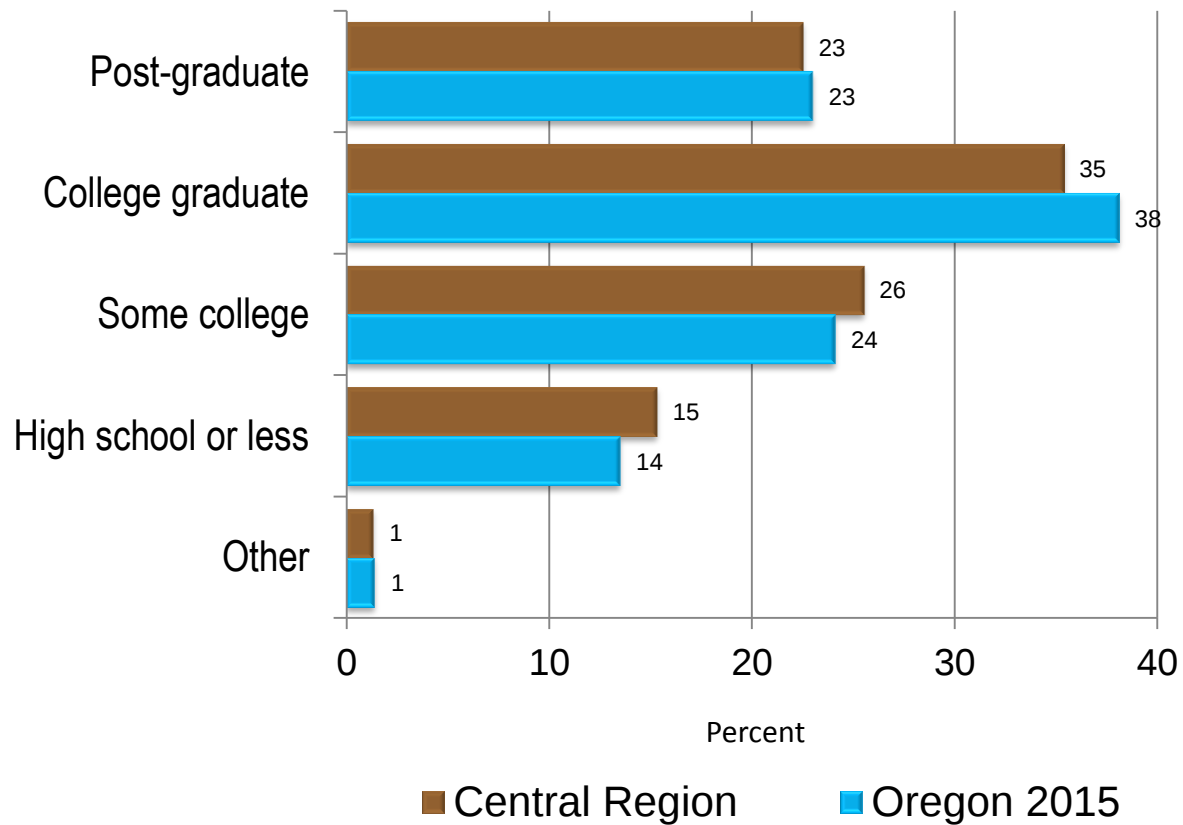
Base: Overnight Marketable Person-Trips



Education



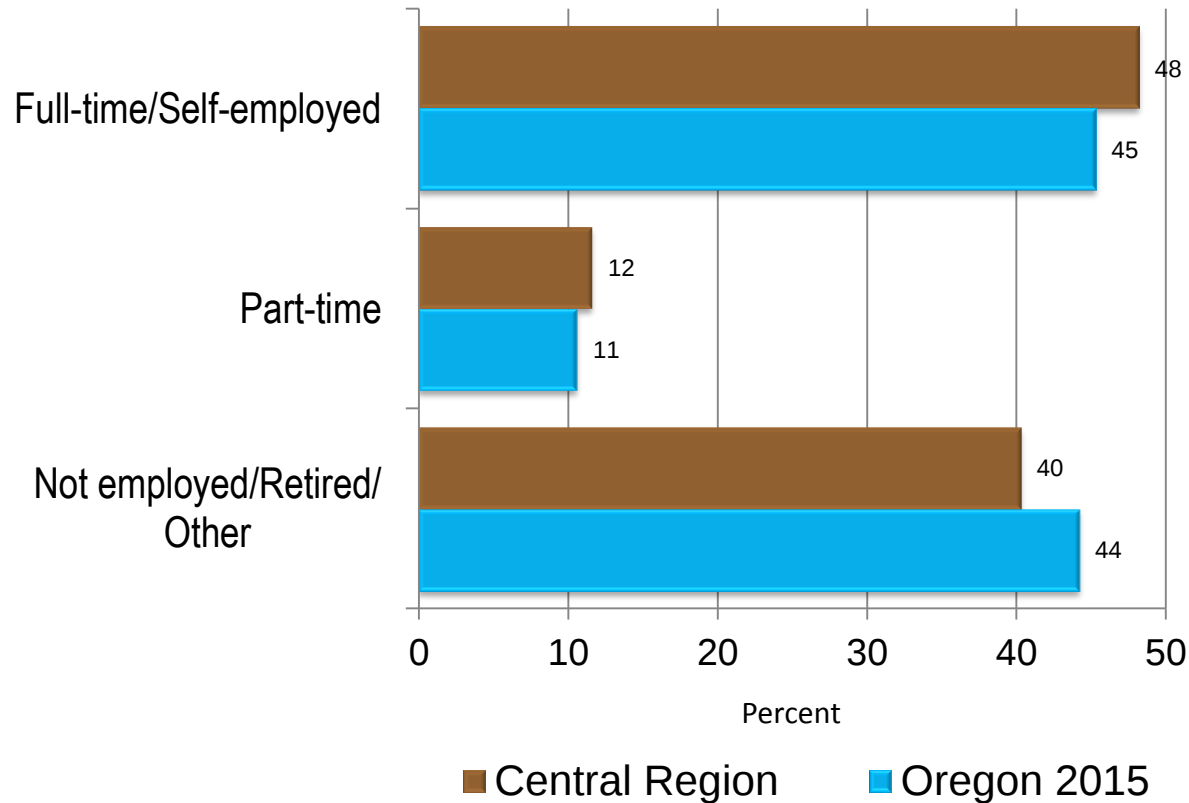
Base: Overnight Marketable Person-Trips



Employment



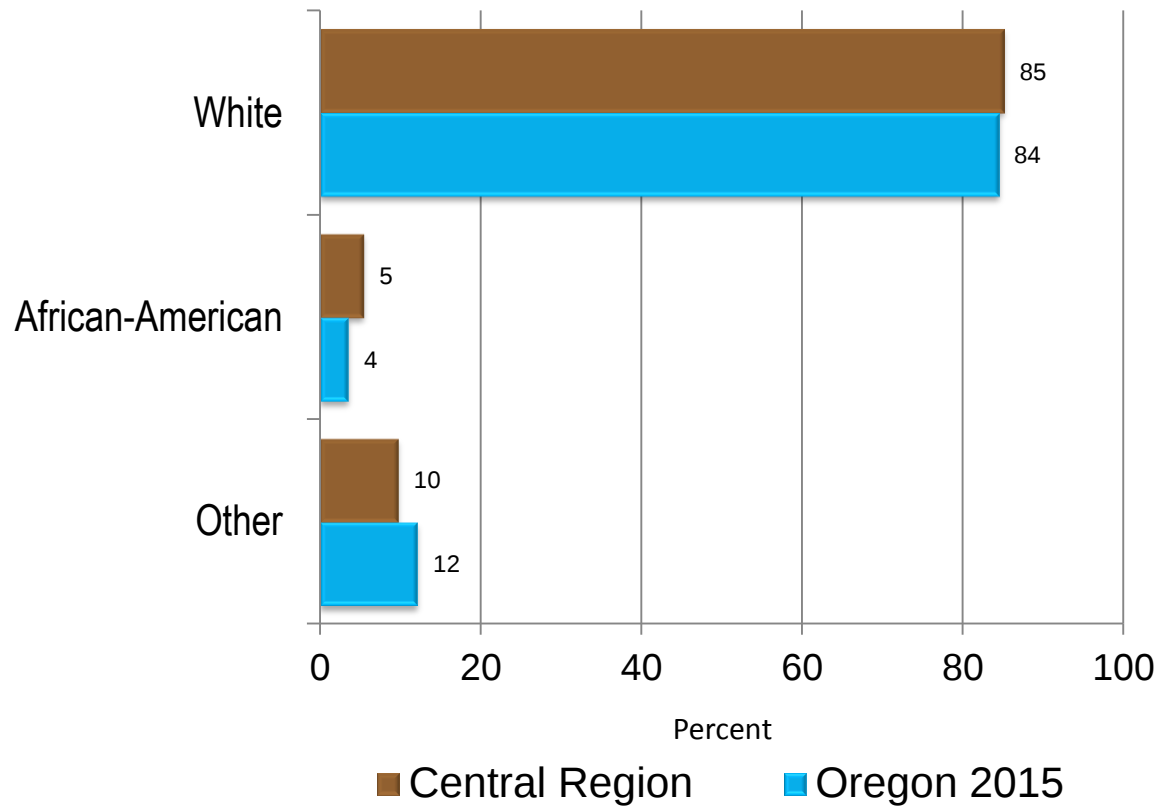
Base: Overnight Marketable Person-Trips



Race



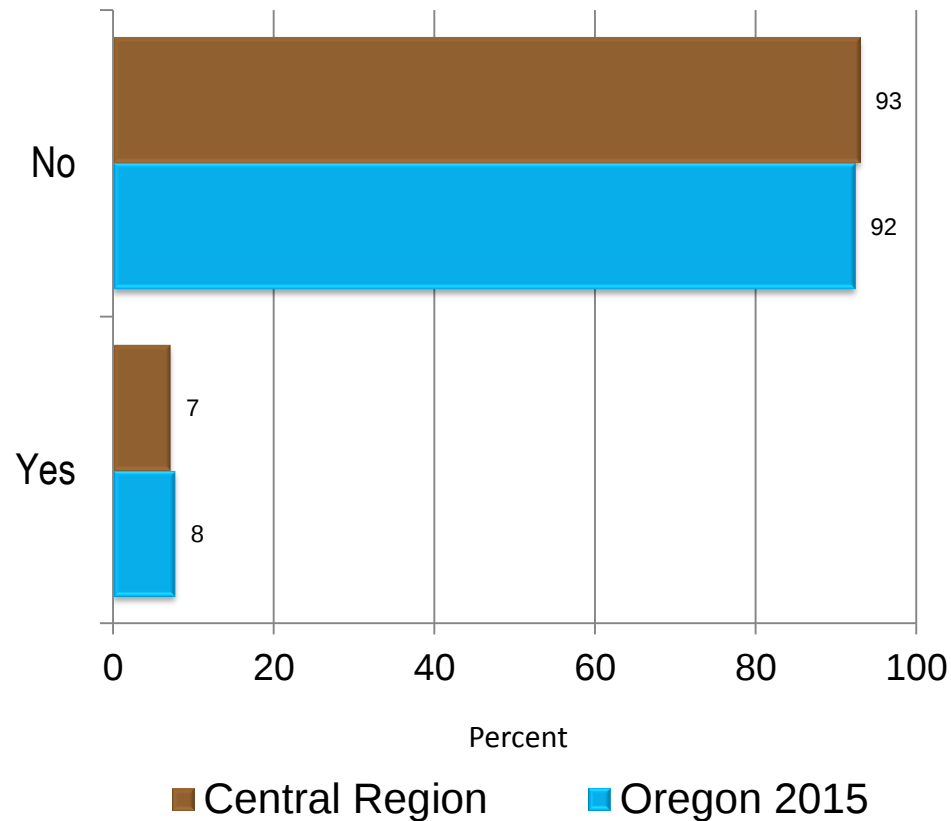
Base: Overnight Marketable Person-Trips



Hispanic Background



Base: Overnight Marketable Person-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