



**TRAVEL
OREGON**

Oregon 2017 Visitor Research



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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 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 for Oregon's **domestic** tourism business in 2017.

Research Objectives

- ✓ The visitor research program is designed to provide:
 - ✓ Estimates of domestic overnight and day visitor volumes to Oregon.
 - ✓ A profile of Oregon's performance within its overnight marketable travel market.
 - ✓ Profiles of Oregon's day marketable travel market.
 - ✓ Relevant trends in each of these areas.

Methodology

- Each quarter, a random, projectable sample of adult members (18 years of age and over) of a major U.S. consumer panel is invited to participate in the Travel **USA®** survey:
 - Selected to be representative of the U.S. adult population
- For the 2017 travel year, this yielded :
 - 329,470 trips for analysis nationally:
 - 232,317 overnight trips
 - 97,153 day trips
- For Oregon, the following sample was achieved in 2017:
 - 6,005 trips:
 - 4,020 overnight trips, 1,930 of which were *marketable trips*
 - 1,985 day trips, 1,152 of which were *marketable trips*
- For analysis, data were weighted on key demographics to correct for any differences between the sample and U.S. population targets.



Key Findings



Key Findings

- In 2017, Oregon had 86.2 million person trips, increasing 3.9% from 2015. 40% were overnight trips and 60% were day trips.
- Marketable trips are defined as those trip types that can be influenced by marketing efforts. The most prevalent marketable trip types were touring through the state and outdoor trips.
- The top three states of origin for visitors on overnight trips to Oregon were Oregon, Washington, and California. Among DMAs, the top three overnight visitor sources were Portland, Eugene, and Seattle.

Key Findings (Cont'd)

- Over eighty percent (81%) of visitors on an overnight trip to Oregon were very satisfied with the overall trip experience. The next highest-ranking categories for satisfaction were friendliness of the local people (69%) and safety and security (69%).
- Among those on overnight trips to Oregon, 85% have visited Oregon at least once before and 69% have visited in the past year.
- Similar to the national average, nearly half (47%) of the overnight trips were planned 2 months or less before the trip. Similar to the national average, 9% did not plan anything in advance.
- Online travel agencies, destination websites, and hotels or resorts were the most common planning sources for a Oregon overnight trip. Hotels and resorts were the most common booking source.

Key Findings (Cont'd)

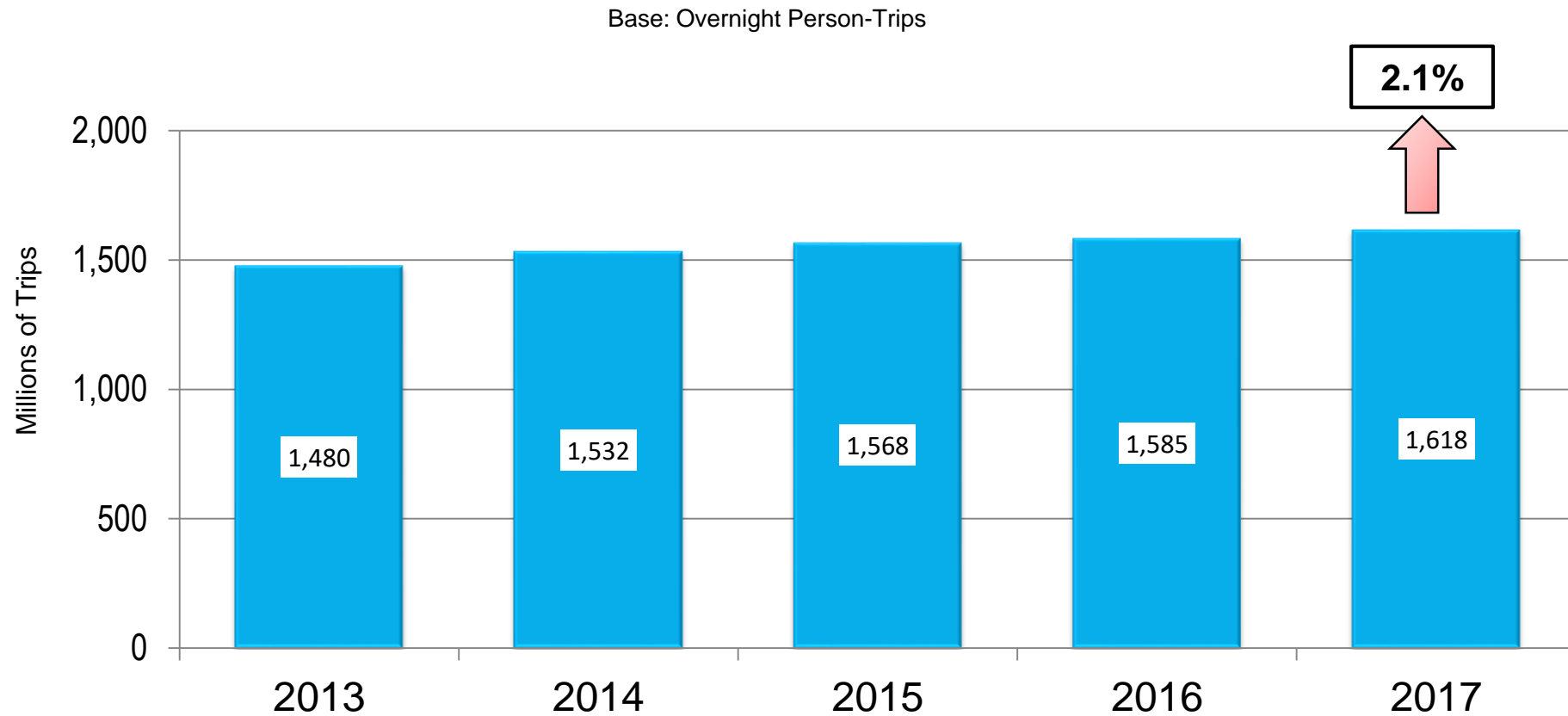
- The average number of nights spent in Oregon on an overnight trip was 2.9 nights, remaining steady from 2015. The average travel party size was 2.9 persons.
- Three-quarters (77%) of overnight Oregon travelers arrived by personal car or truck.
- The top five activities and experiences during an overnight trip to Oregon were shopping, going to the beach or a waterfront, visiting a national or state park, landmark/historic site visits, and fine dining.
- Over two-thirds of Oregon visitors (71%) traveled with a spouse or partner, and 29% traveled with children. Fourteen percent (14%) traveled alone.



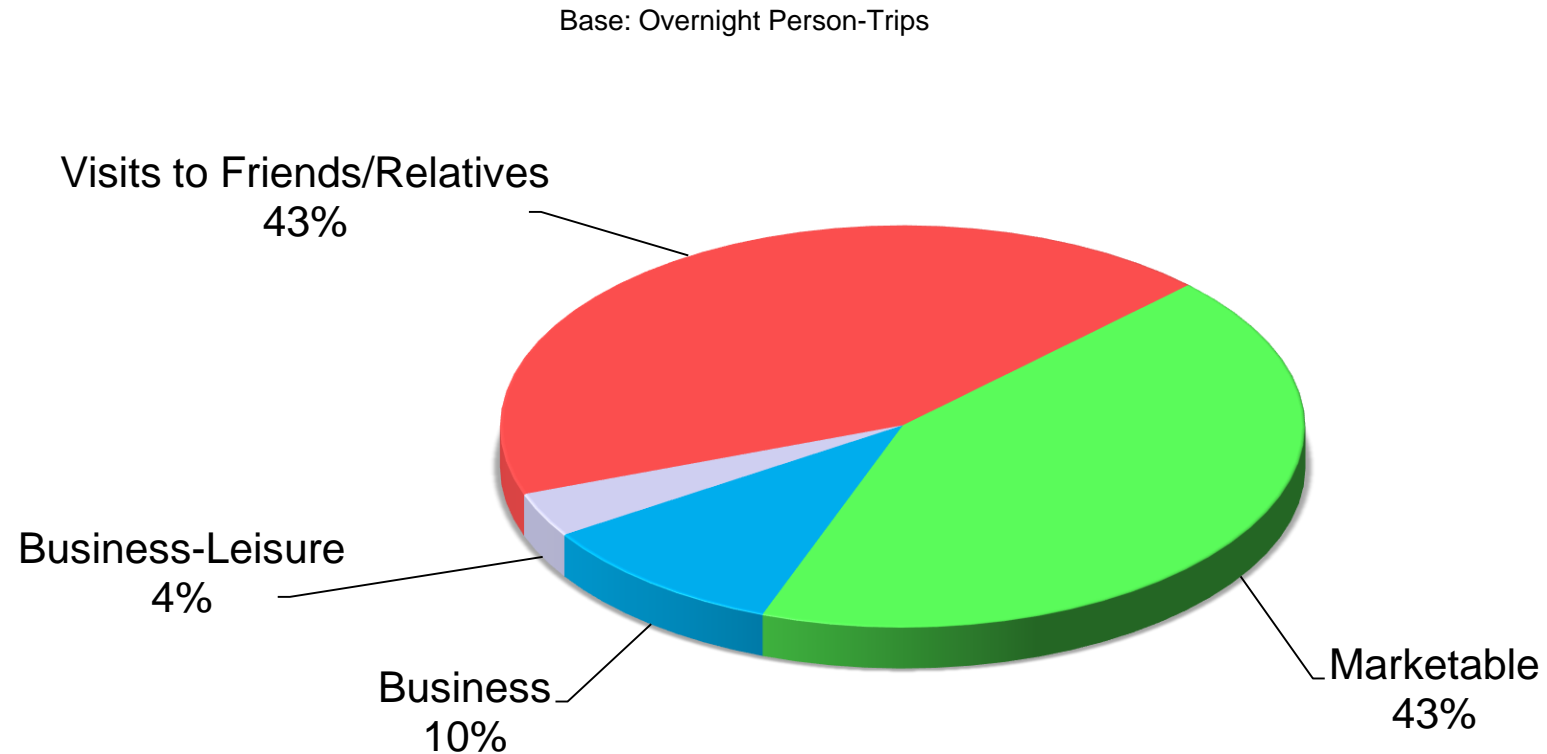
Size & Structure of the U.S. Travel Market



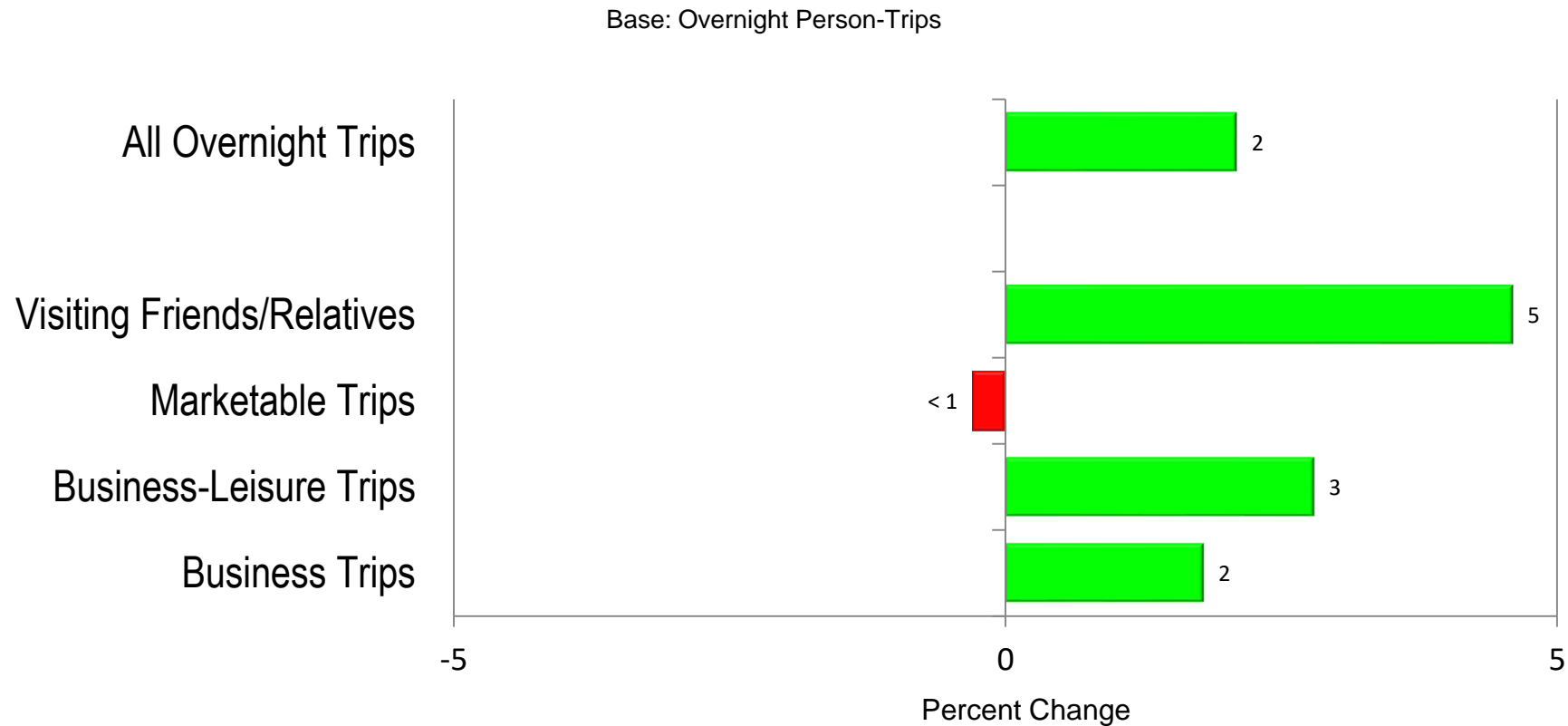
Total Size of the U.S. Travel Market — 2013-2017



Structure of the U.S. Travel Market — 2017 Overnight Trips



U.S. Market Trends for Overnight Trips — 2017 vs. 2016





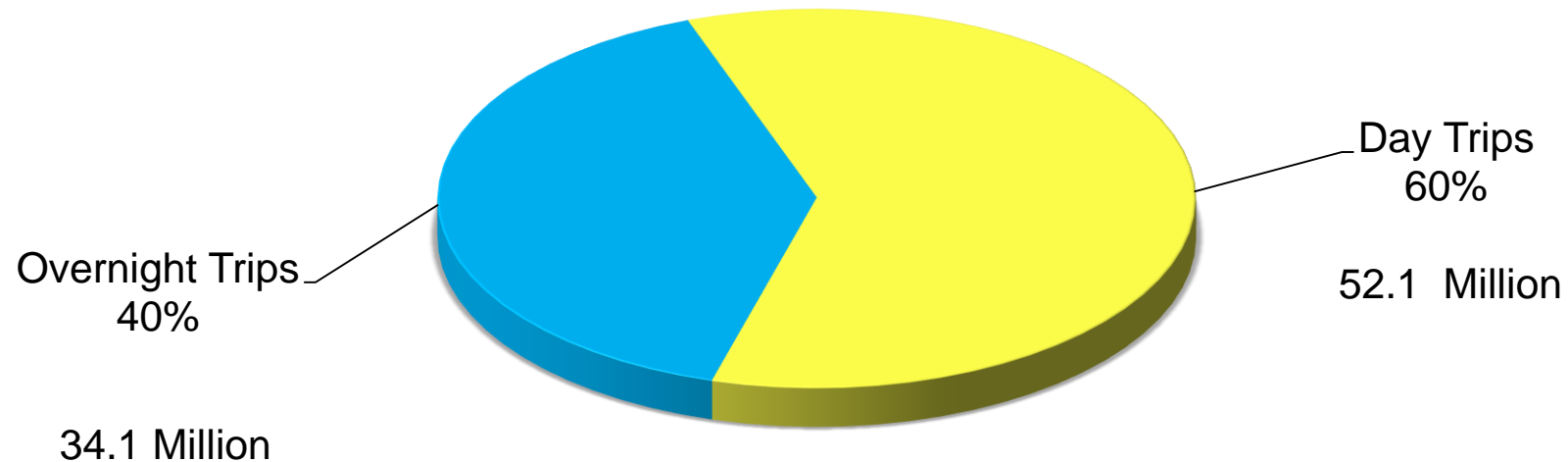
Size & Structure of Oregon's Domestic Travel Market



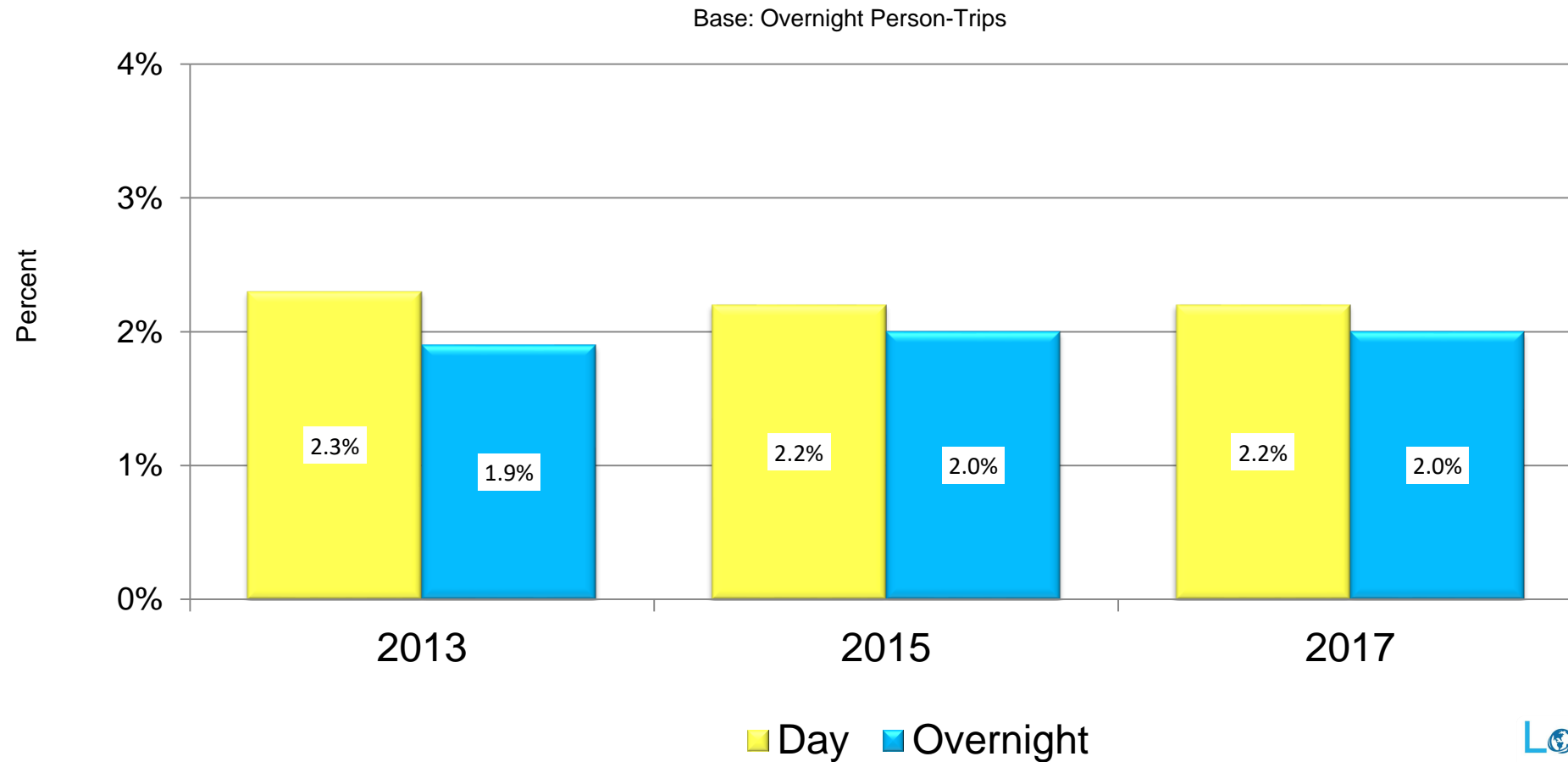
Total Size of Oregon 2017 Domestic Travel Market

Total Person-Trips = 86.2 Million

+3.9% vs. 2015

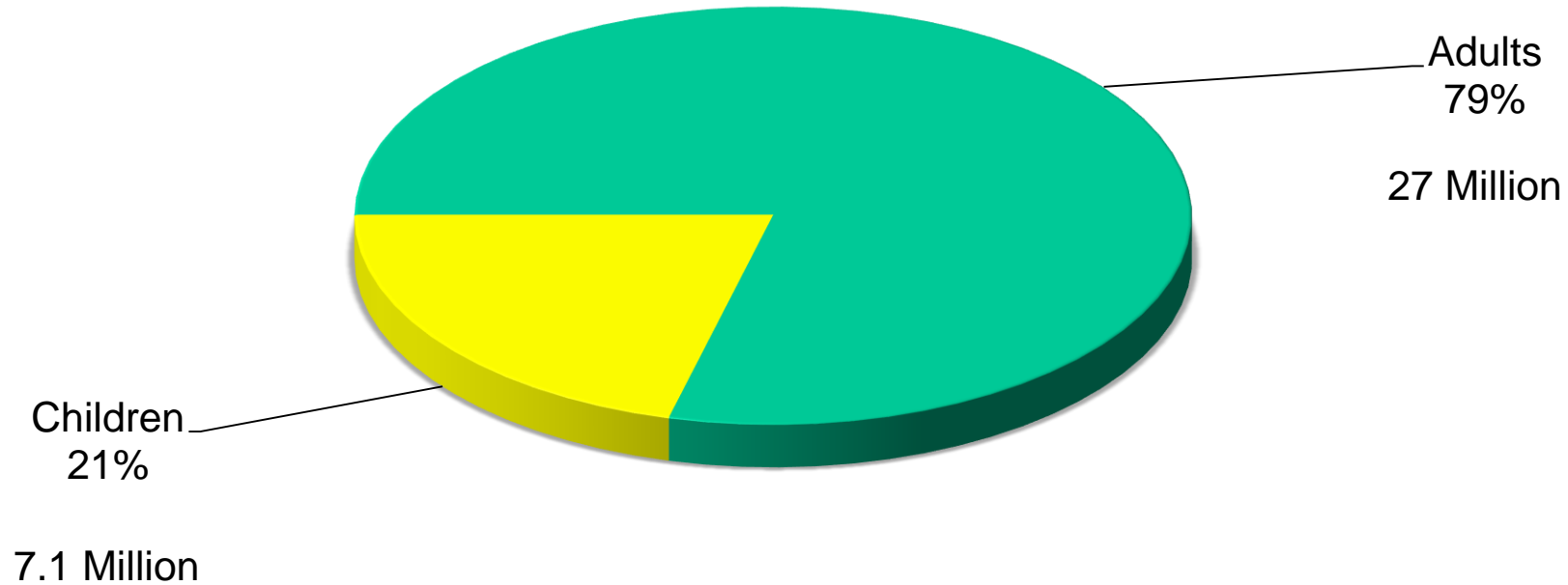


Oregon's Share of Adult Domestic Trips



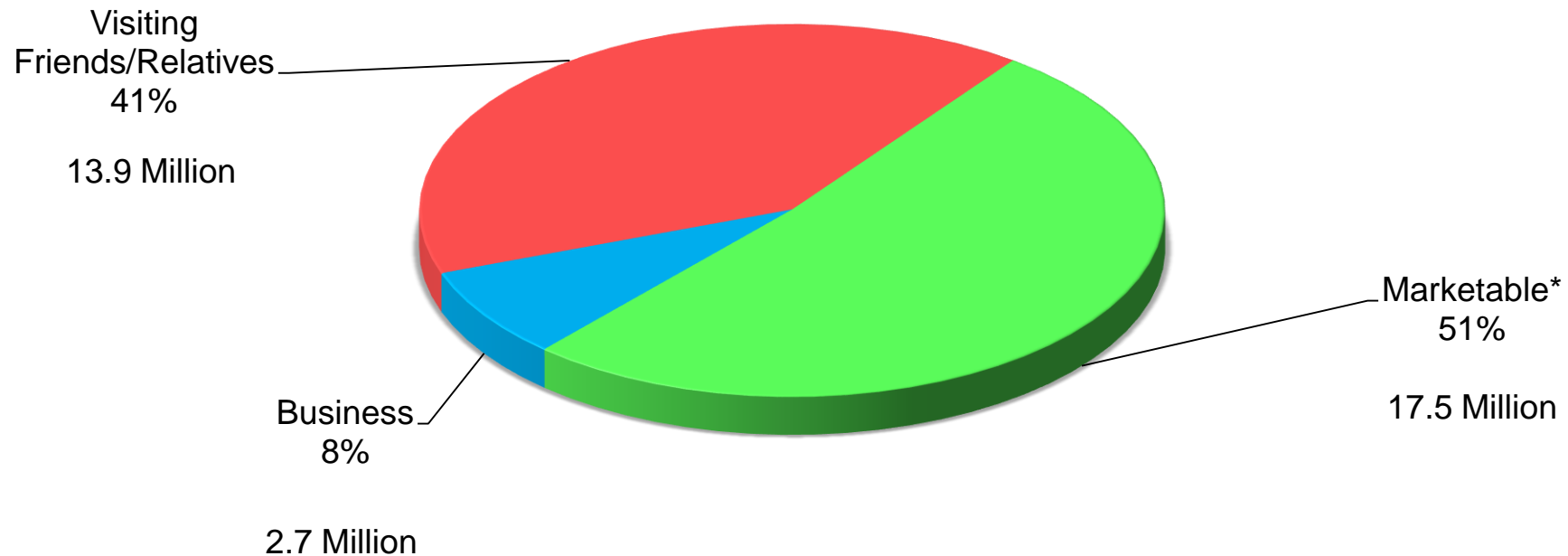
Size of Oregon Overnight Travel Market — Adults vs. Children

Total Overnight Person-Trips = 34.1 Million



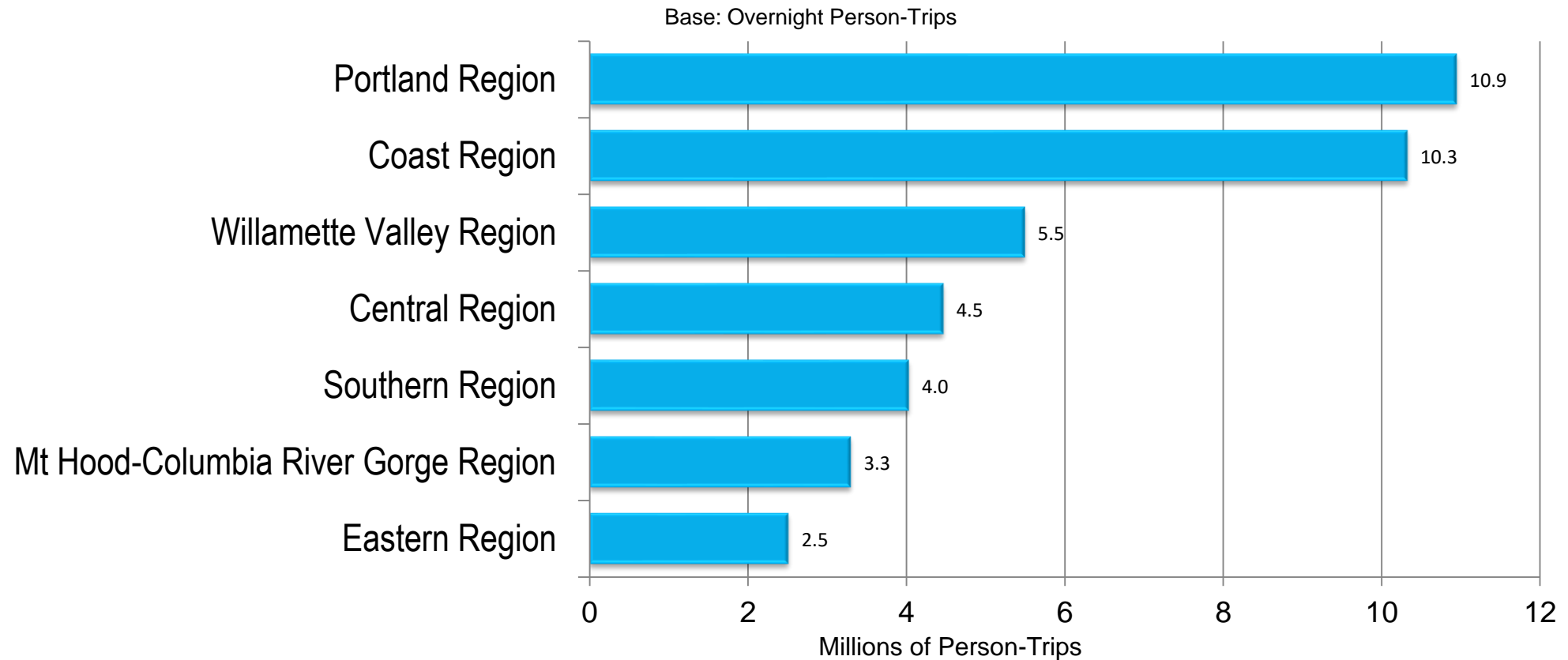
Oregon Overnight Travel Market — by Main Trip Purpose

Total Overnight Person-Trips = 34.1 Million



*Marketable includes Business-Leisure

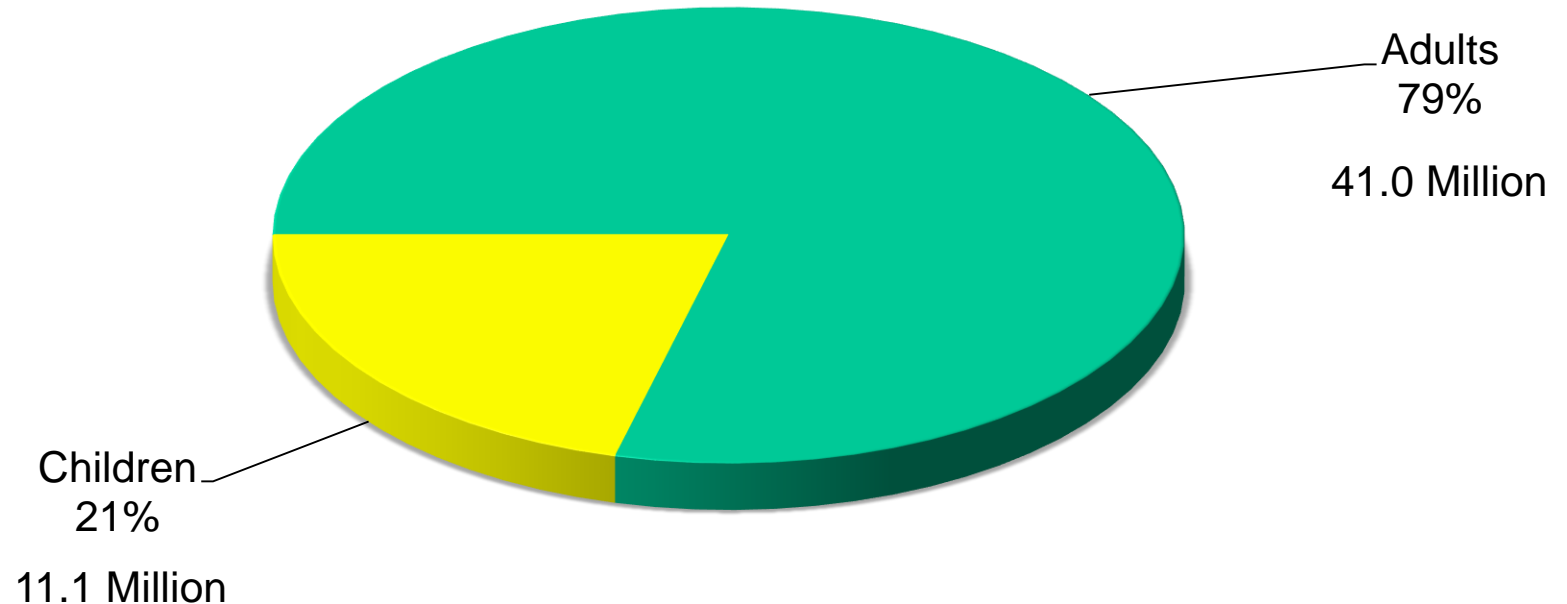
Oregon Regional Overnight Travel Volume*



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

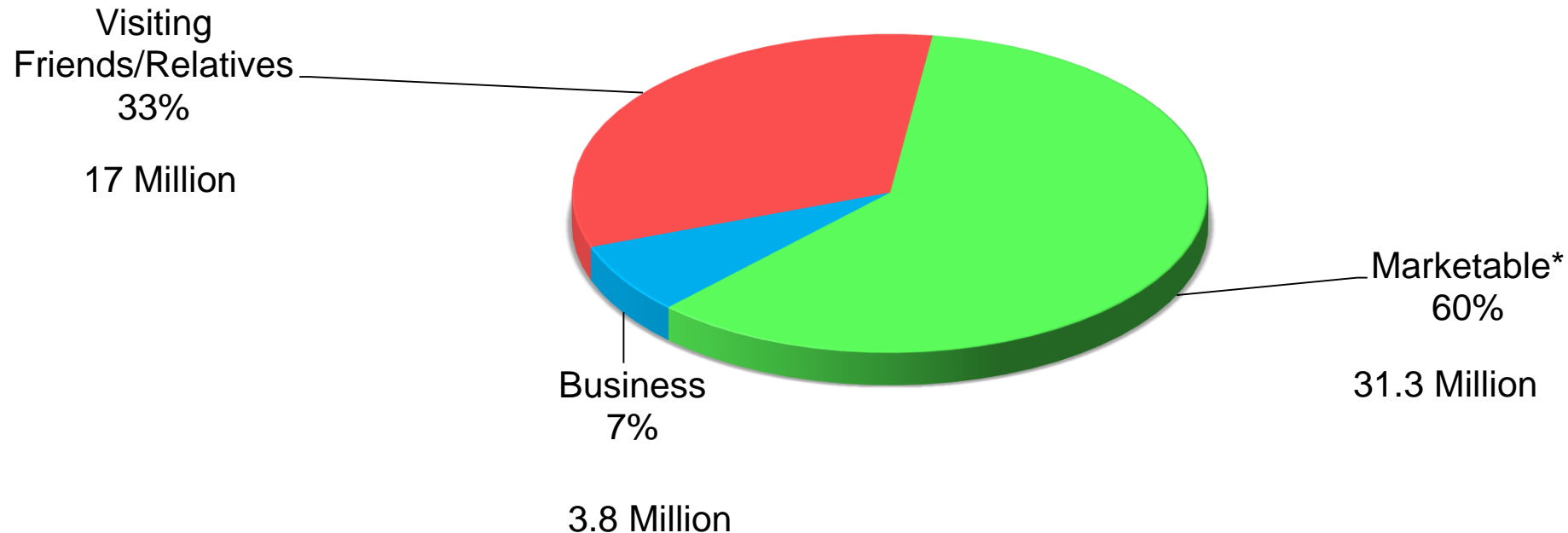
Size of Oregon Day Travel Market — Adults vs. Children

Total Day Person-Trips = 52.1 Million



Oregon Day Travel Market — by Trip Purpose

Total Day Person-Trips = 52.1 Million



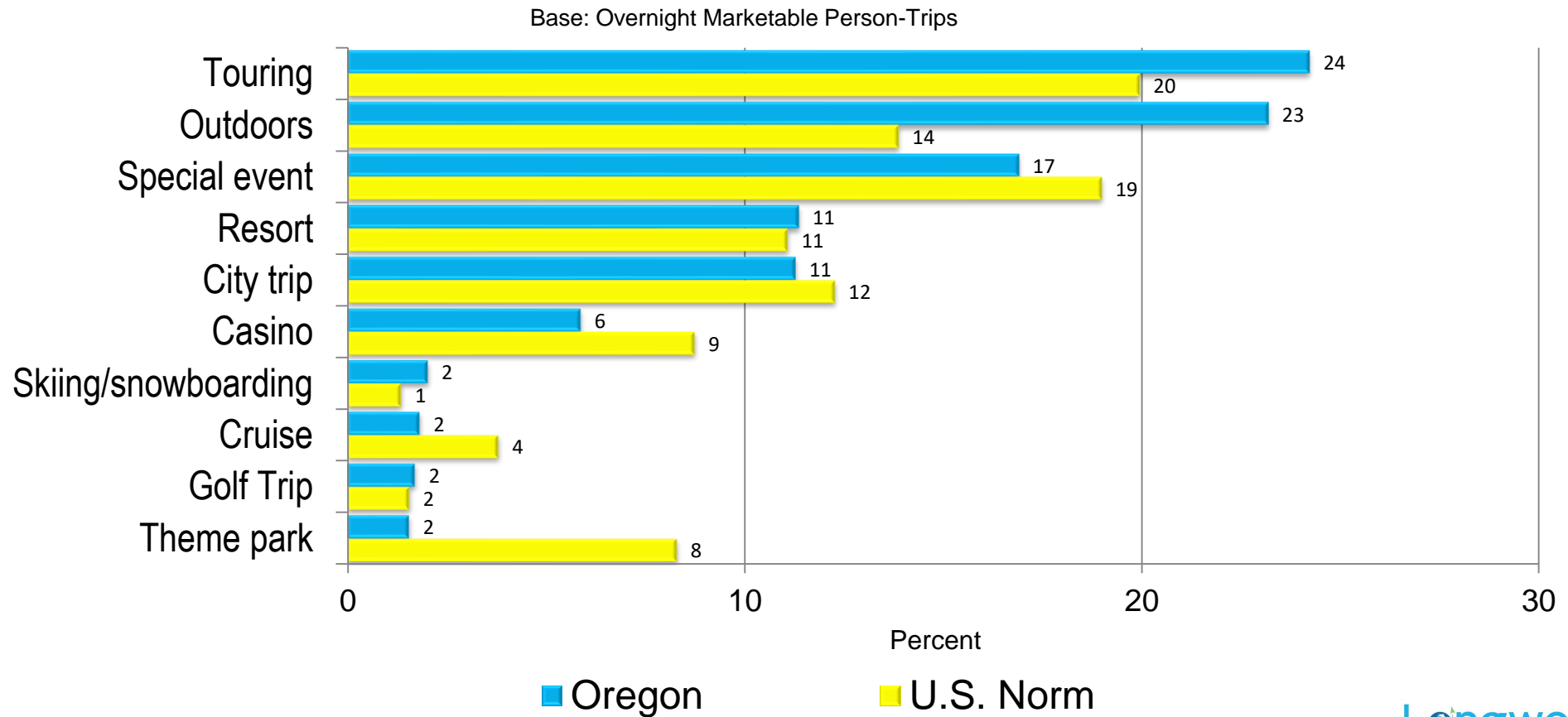


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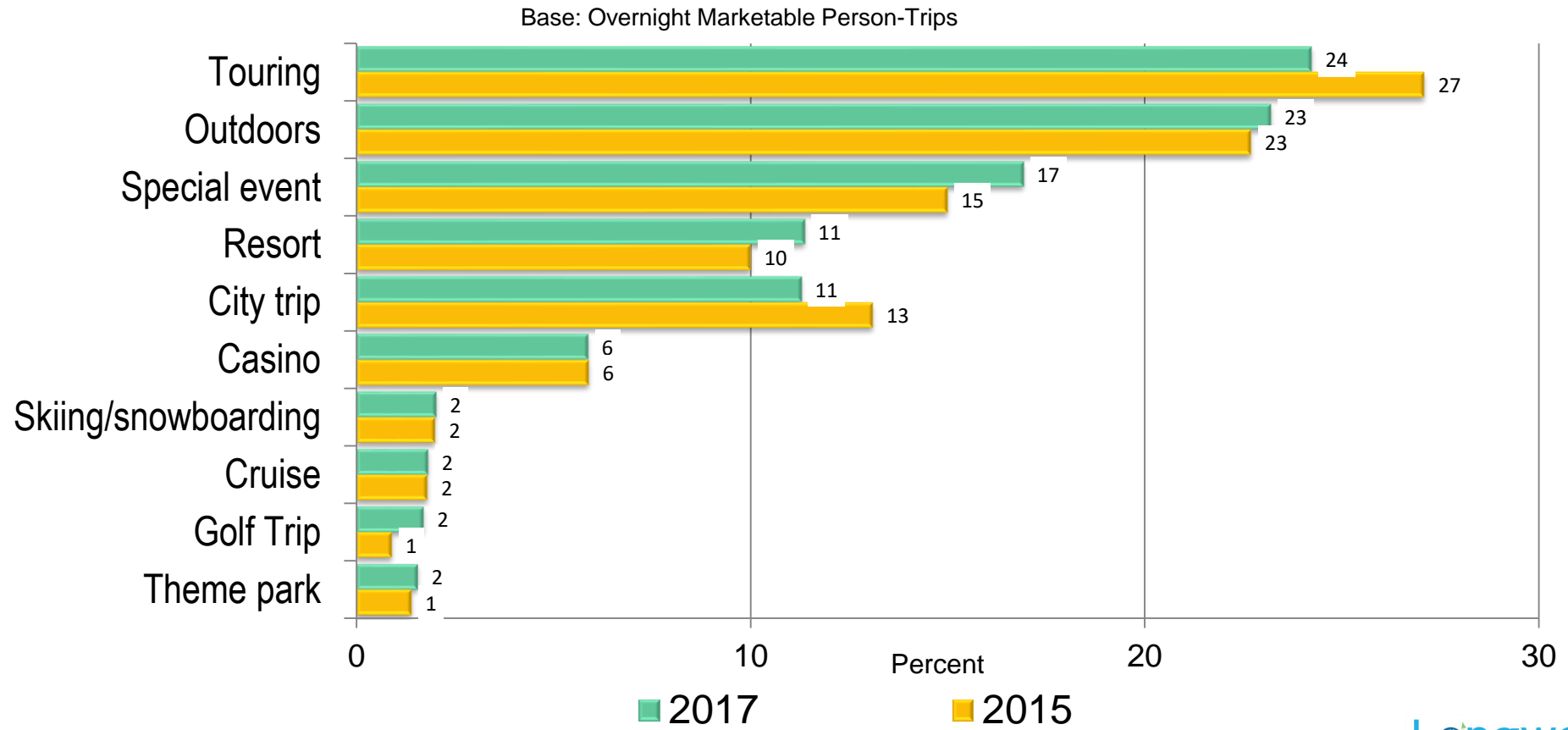
Overnight Trip Characteristics



Main Purpose of Marketable Trip – Oregon vs. National Norm

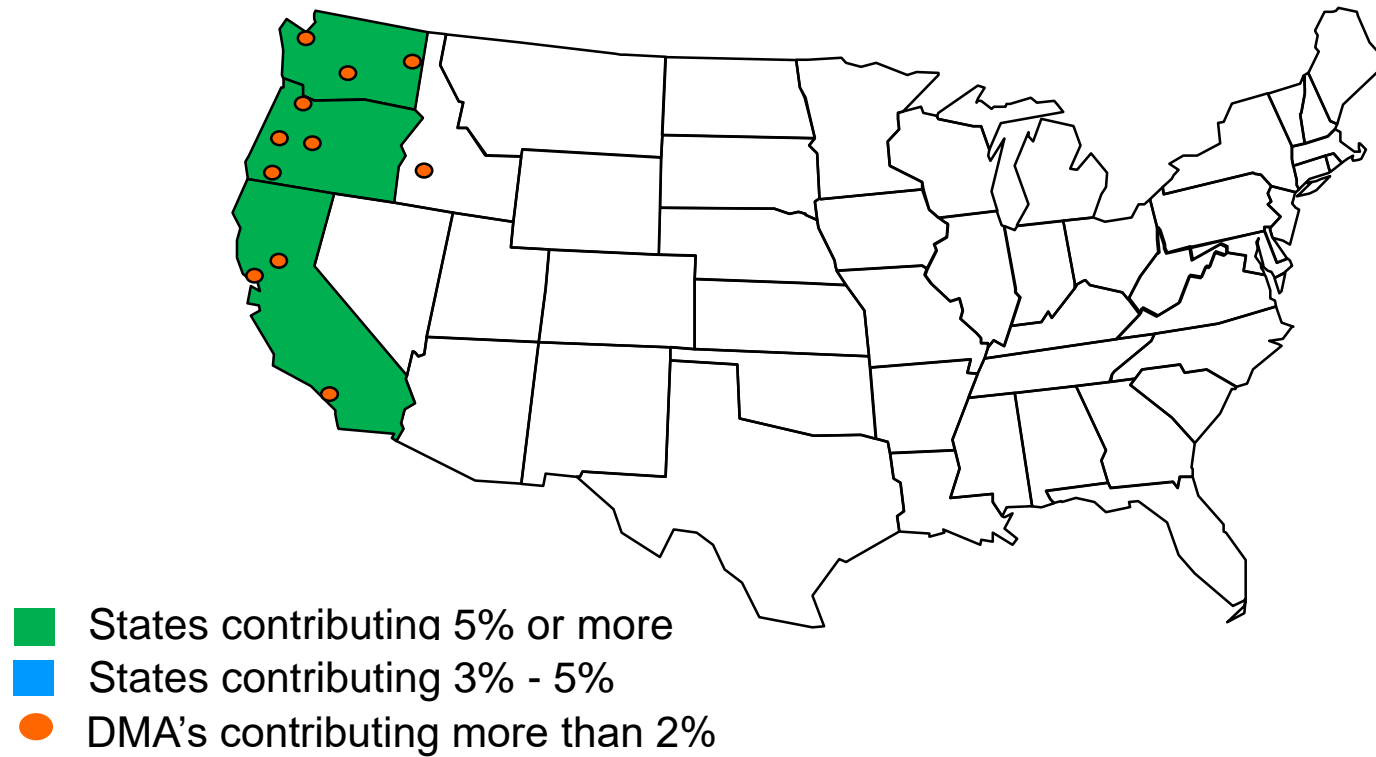


Main Purpose of Overnight Marketable Trip — 2017 vs. 2015

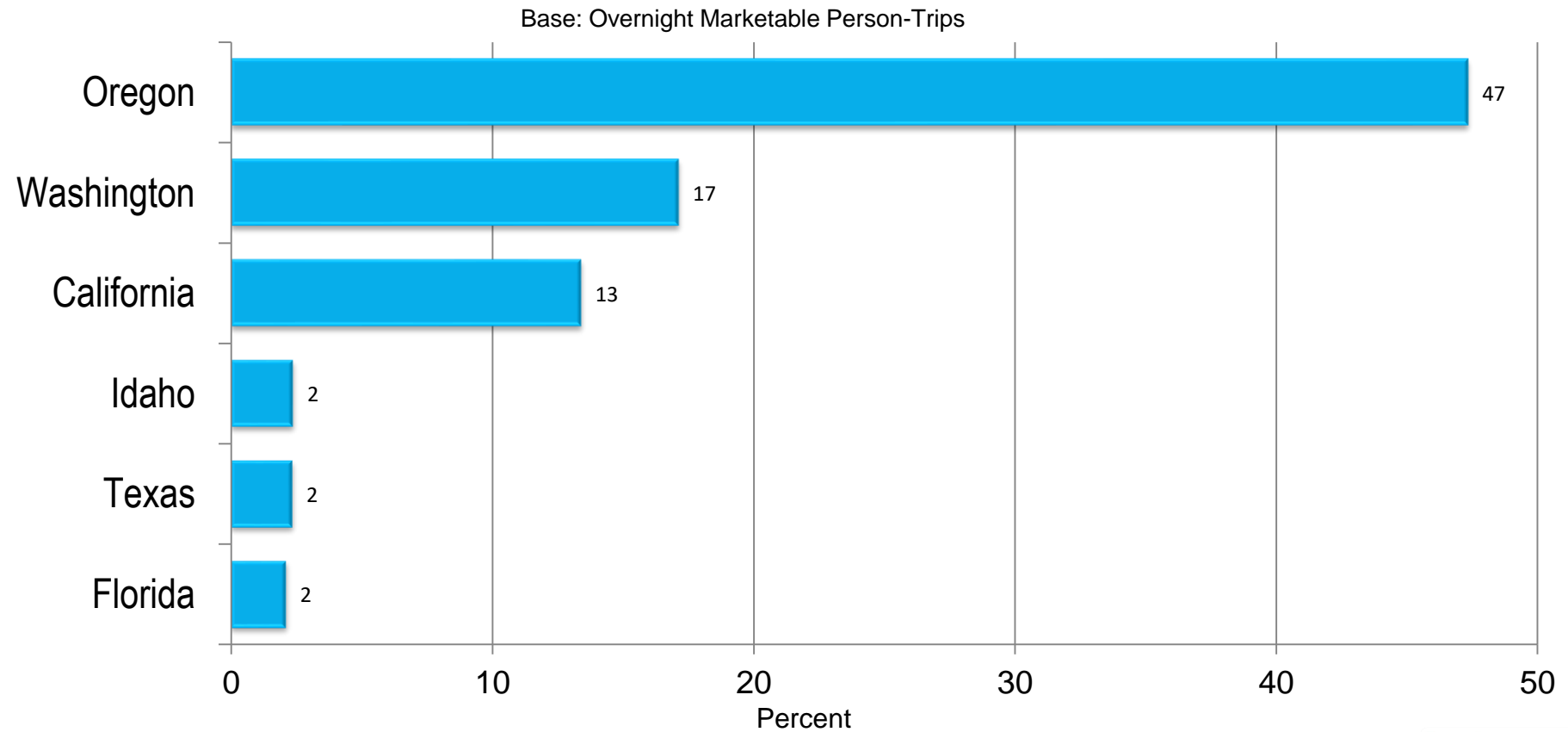


Sources of Business

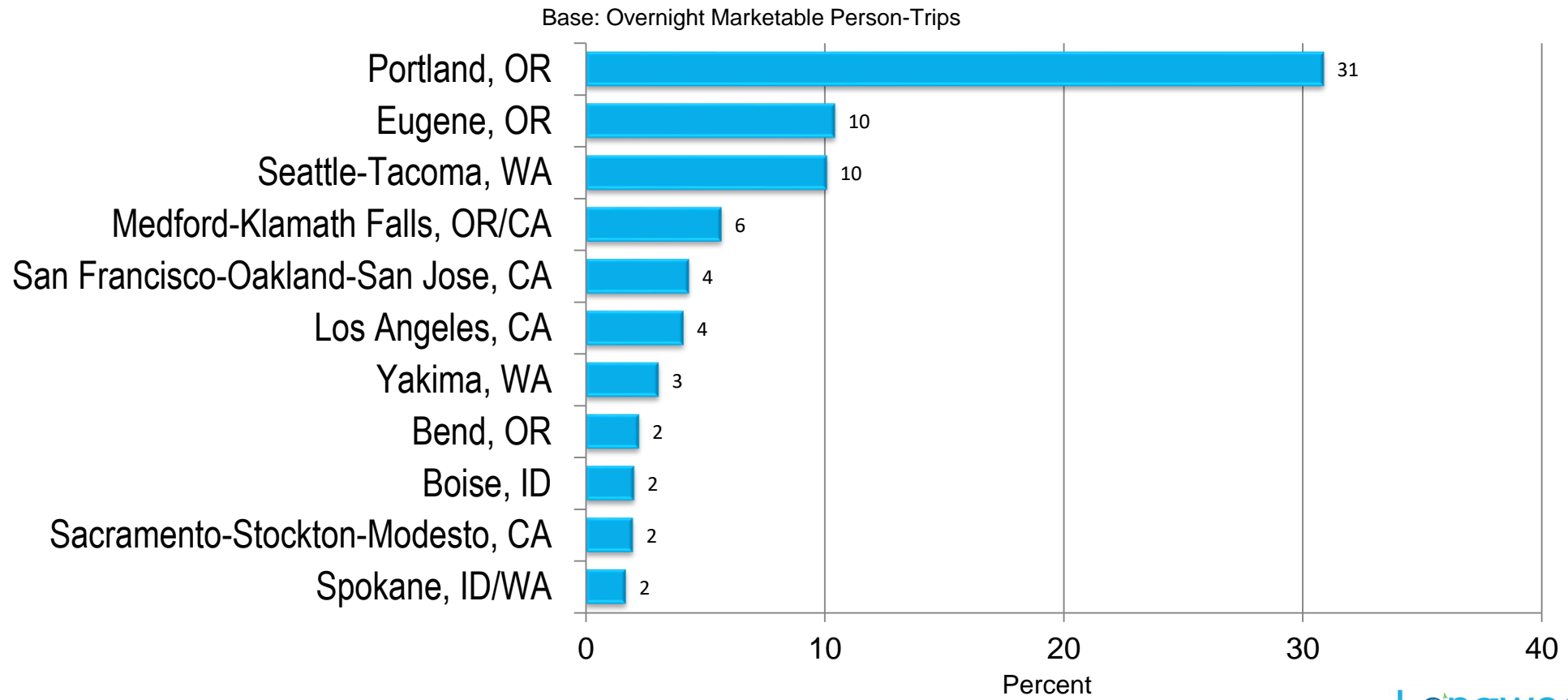
Base: Overnight Marketable Person-Trips



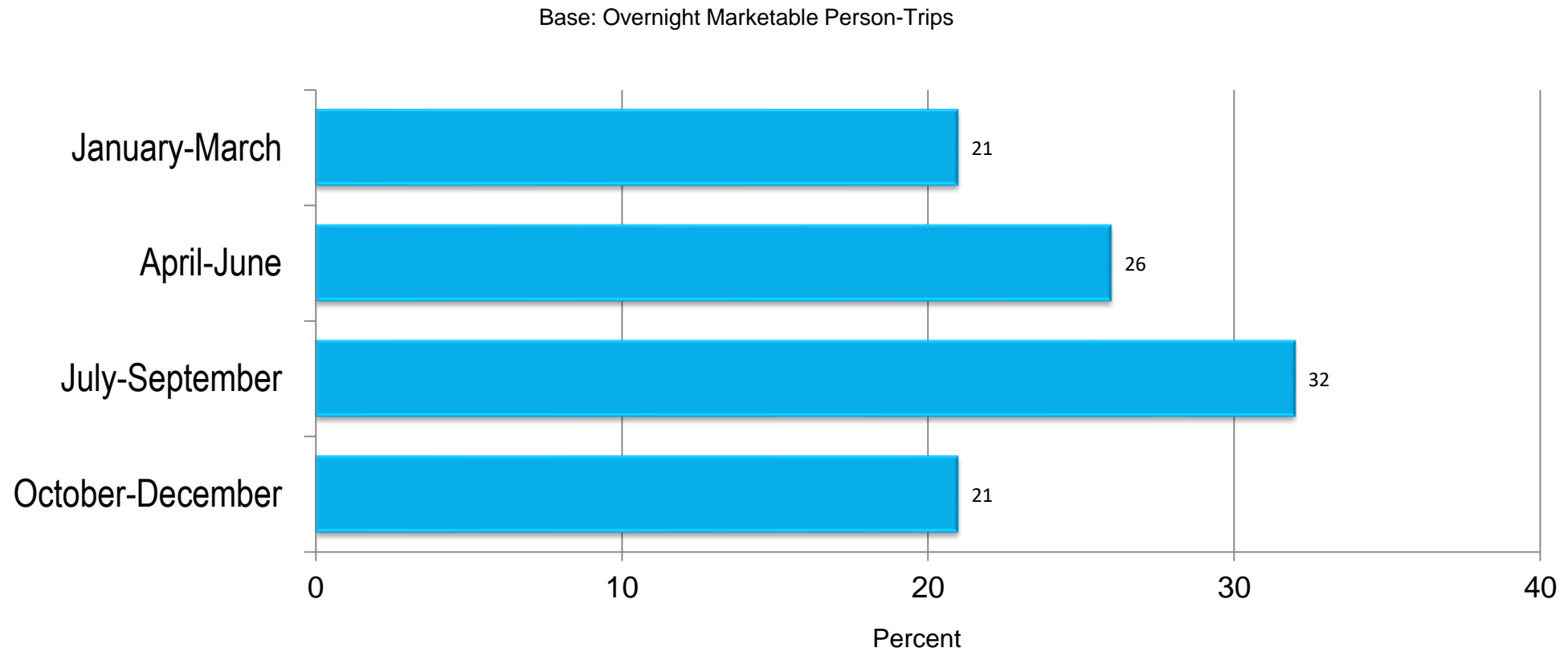
State Origin Of Trip



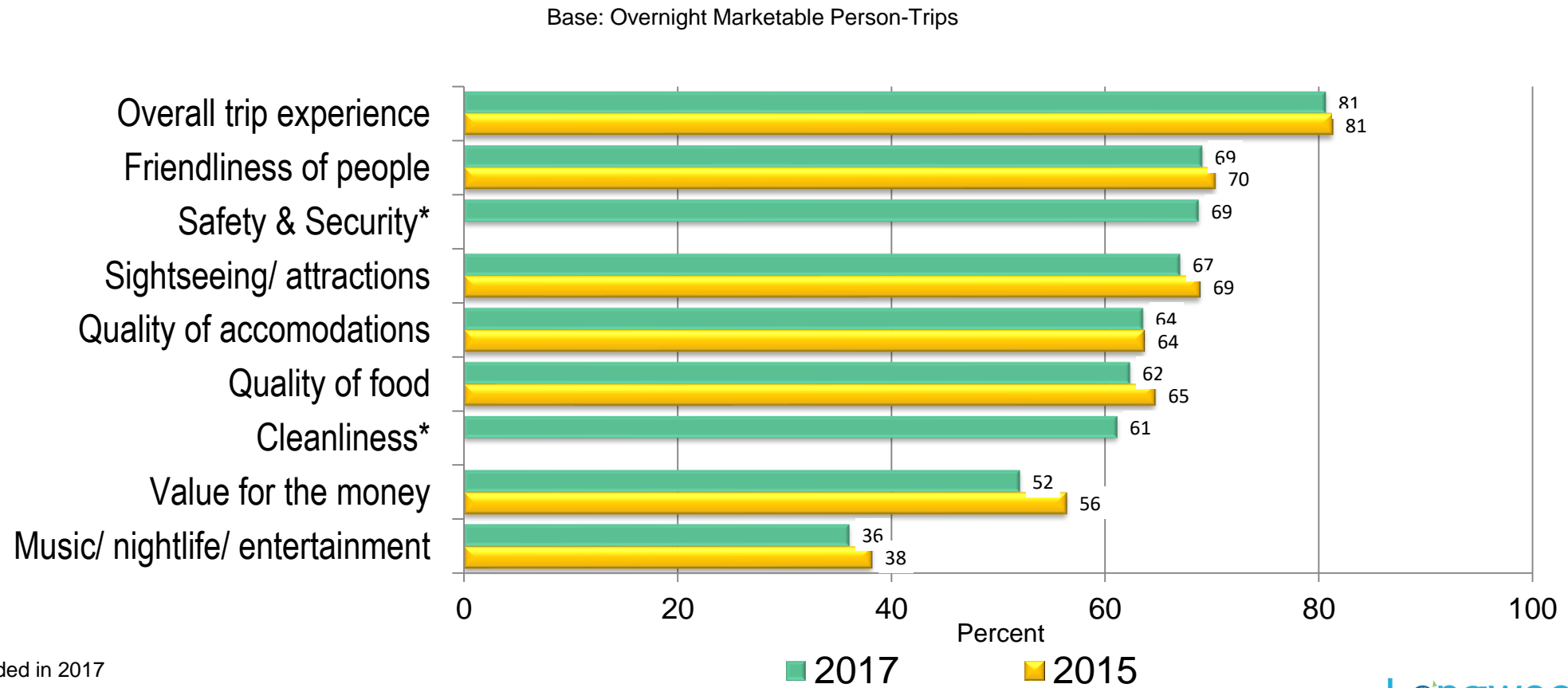
DMA Origin Of Trip



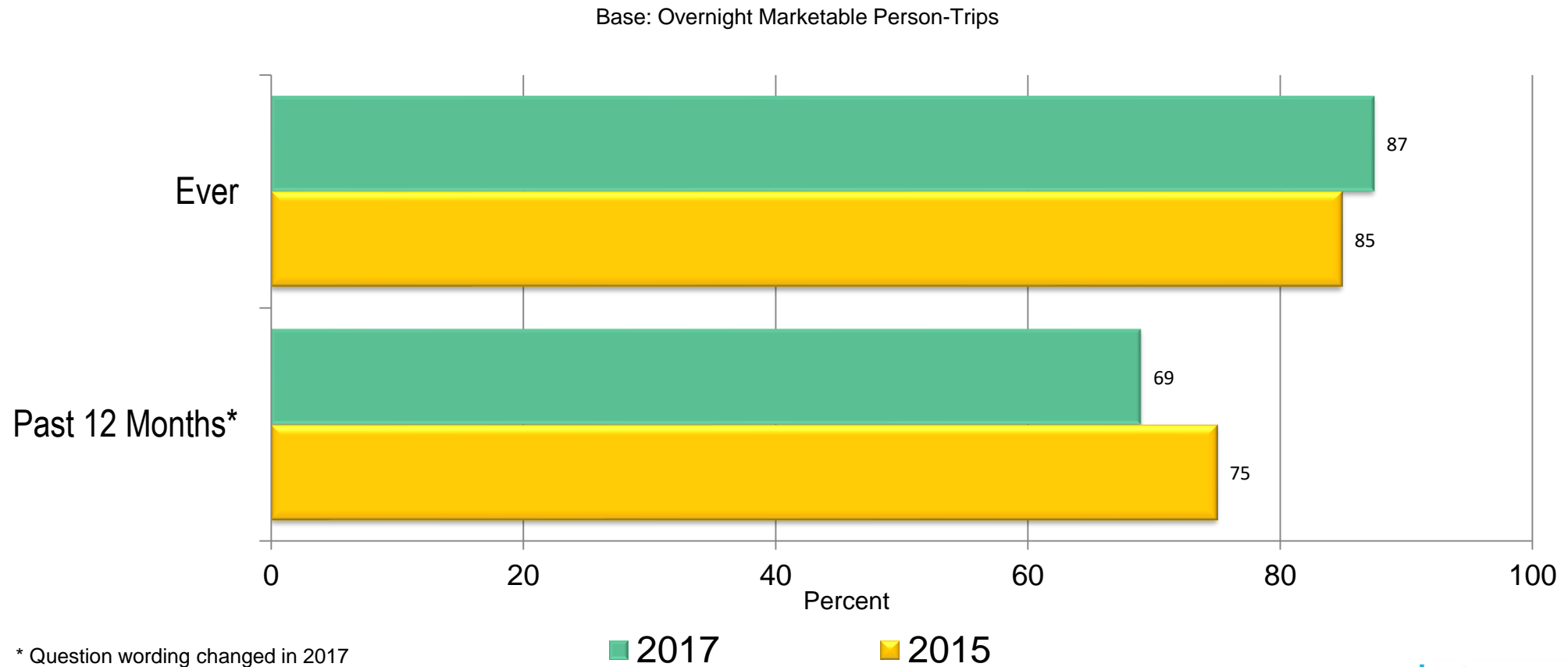
Season of Trip



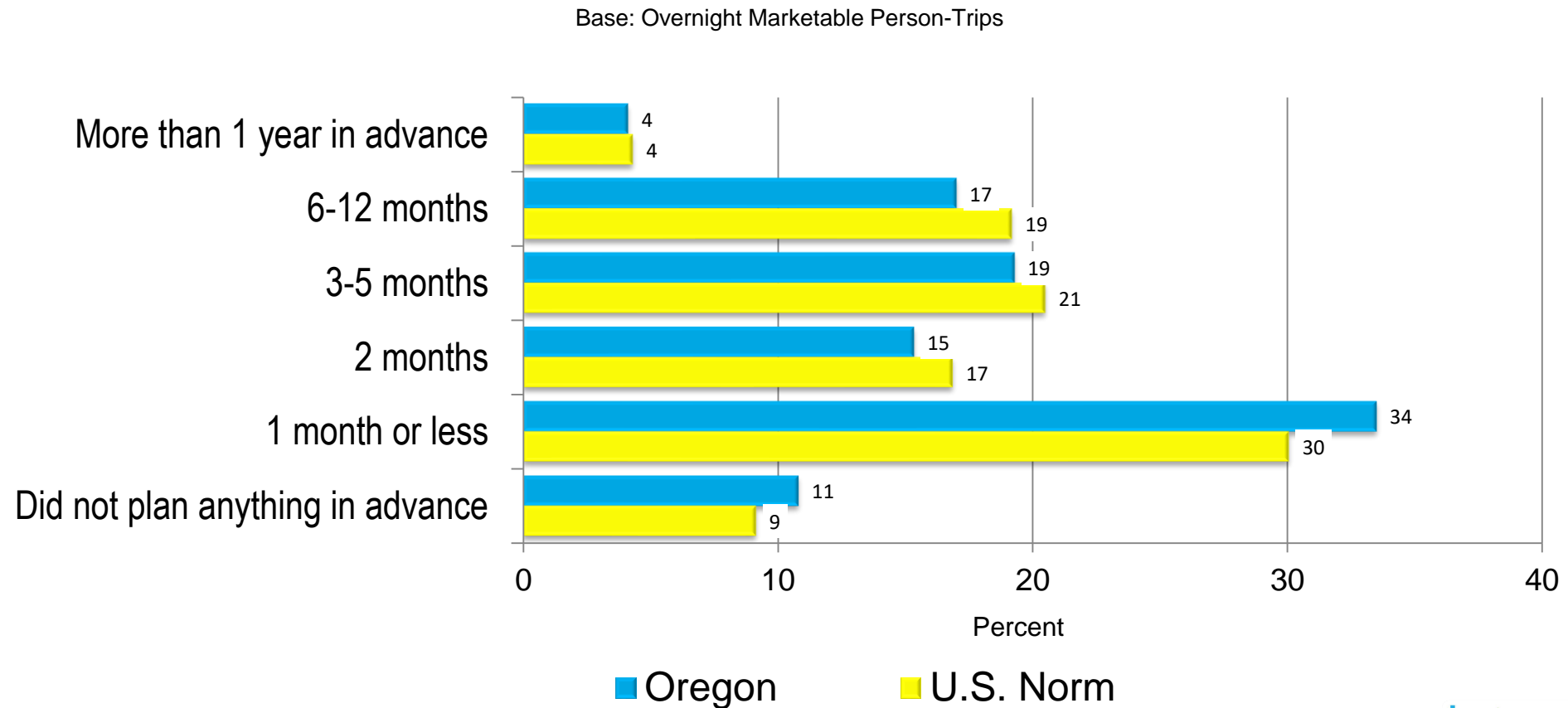
% Very Satisfied with Trip



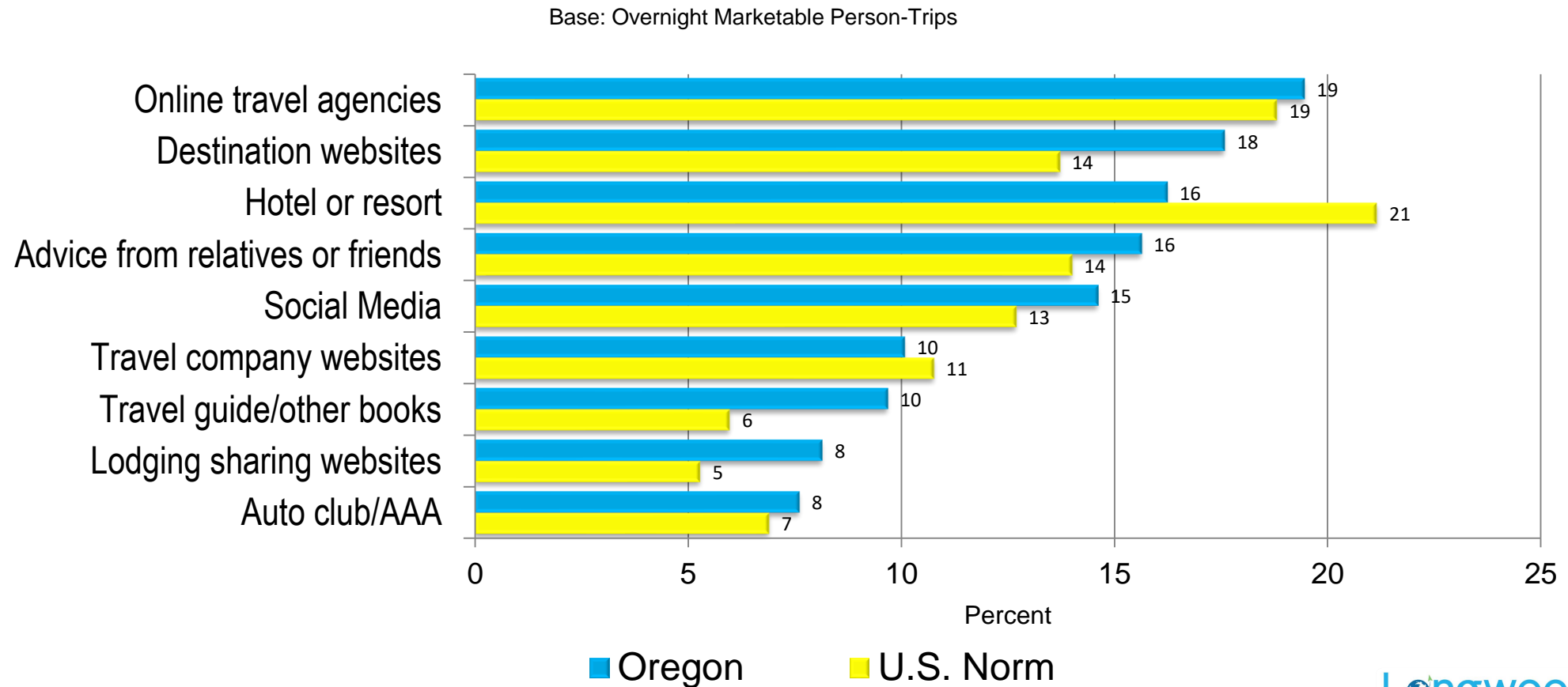
Past Visitation to Oregon



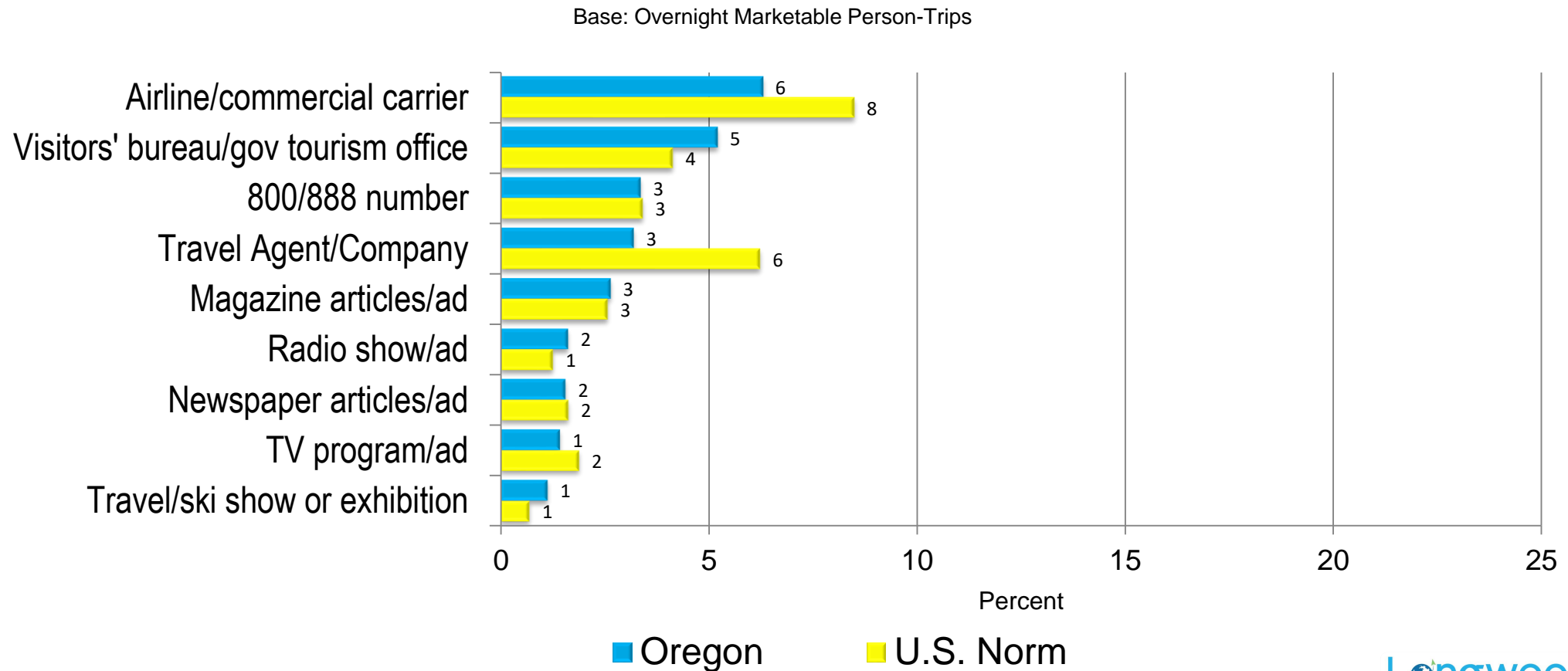
Length of Trip Planning



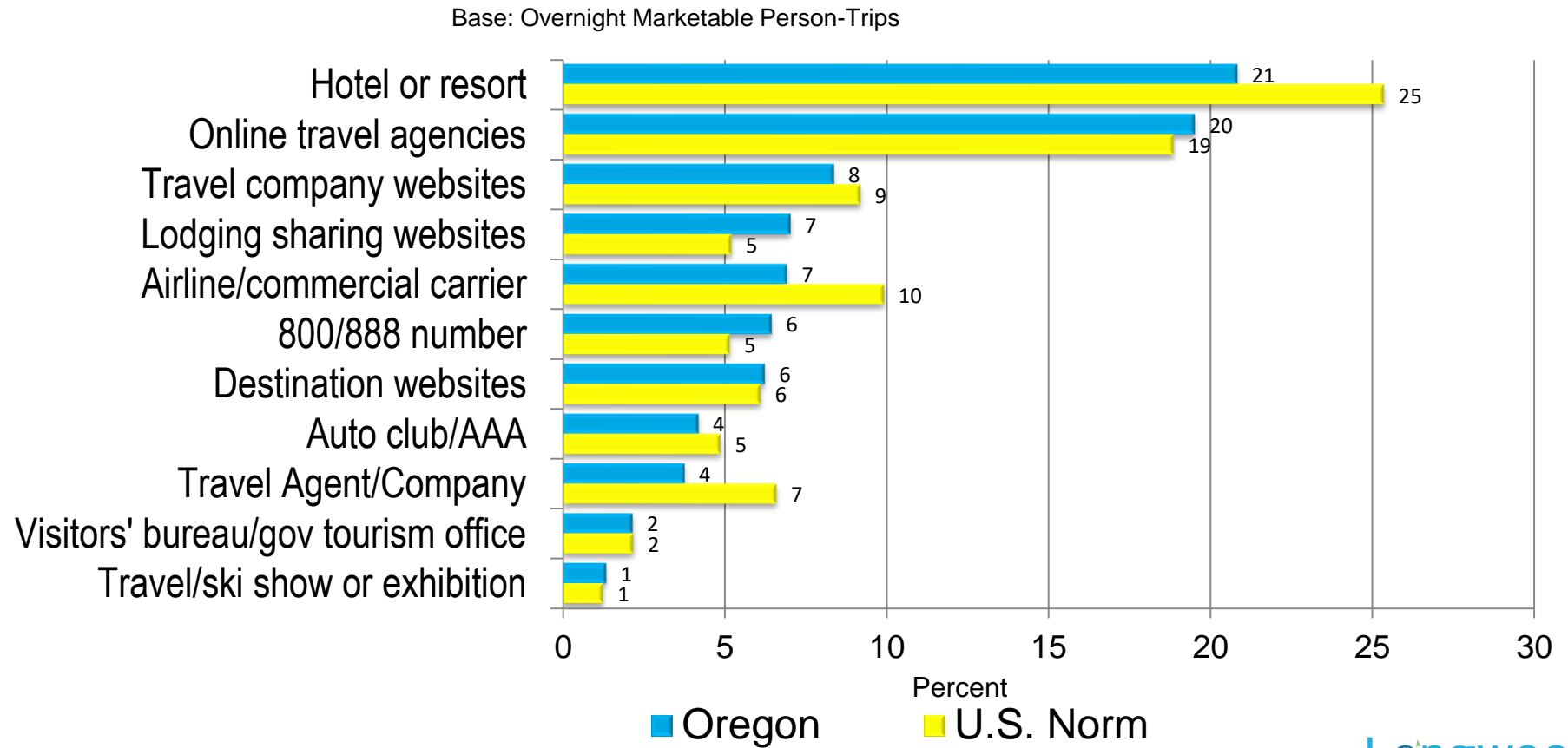
Trip Planning Information Sources



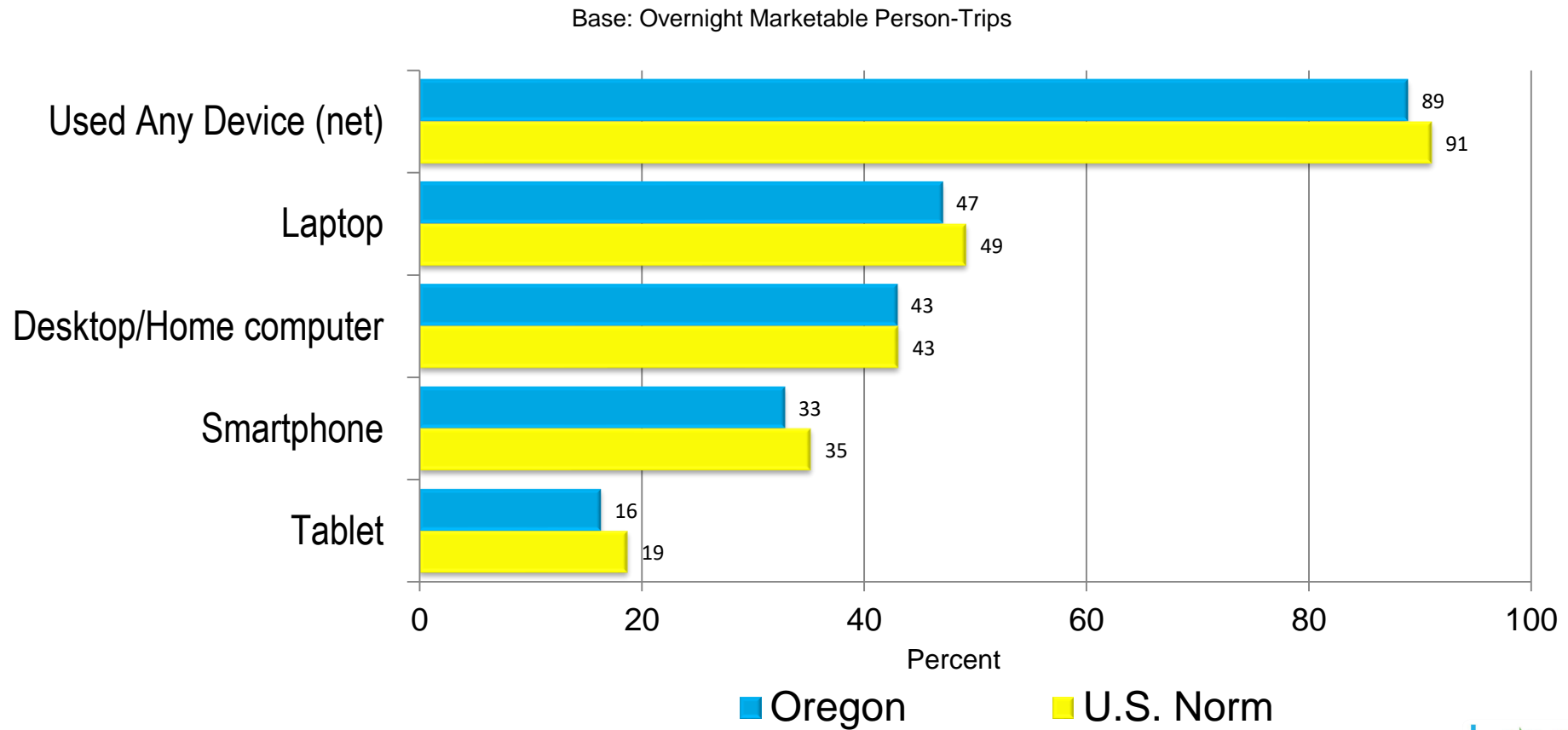
Trip Planning Information Sources (Cont'd)



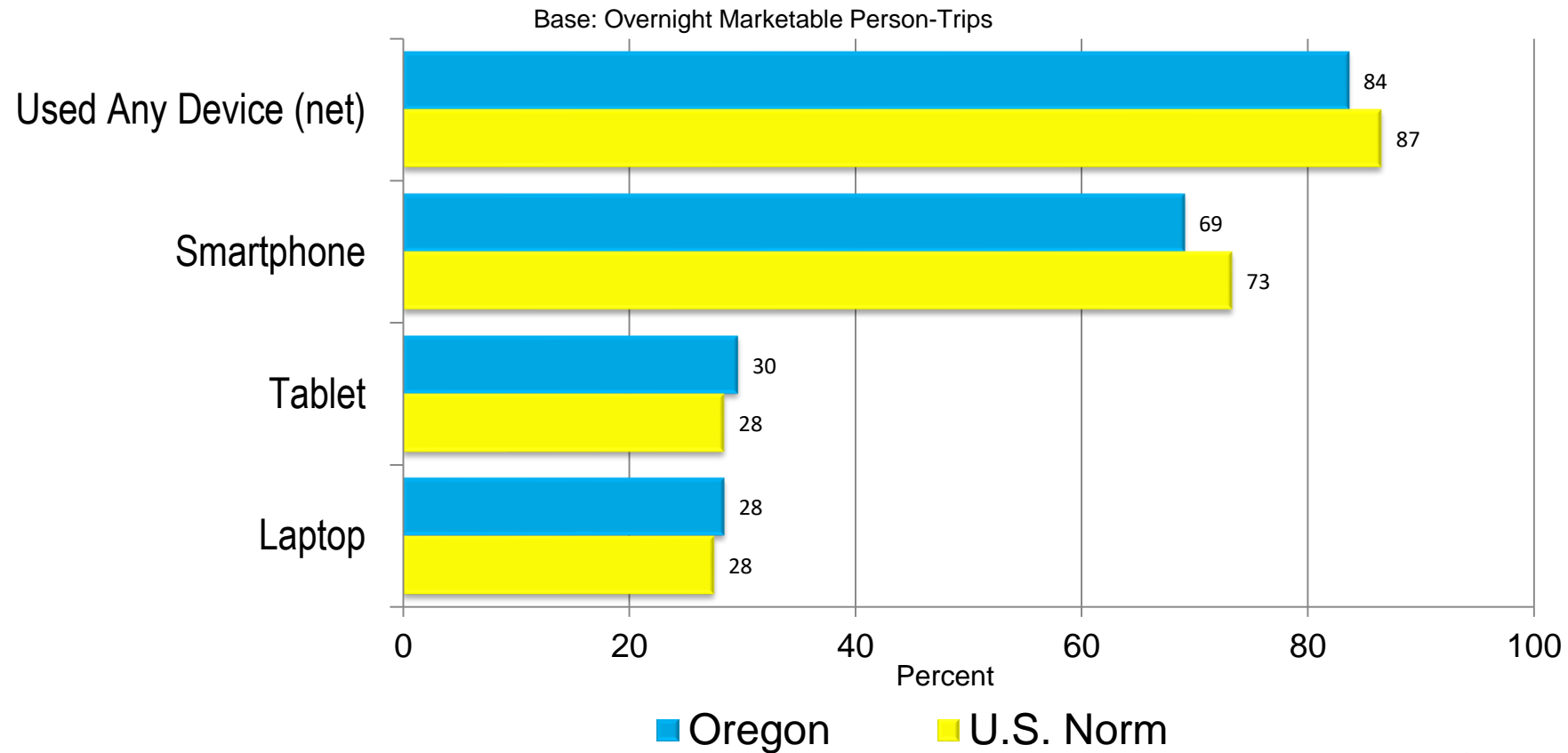
Method of Booking



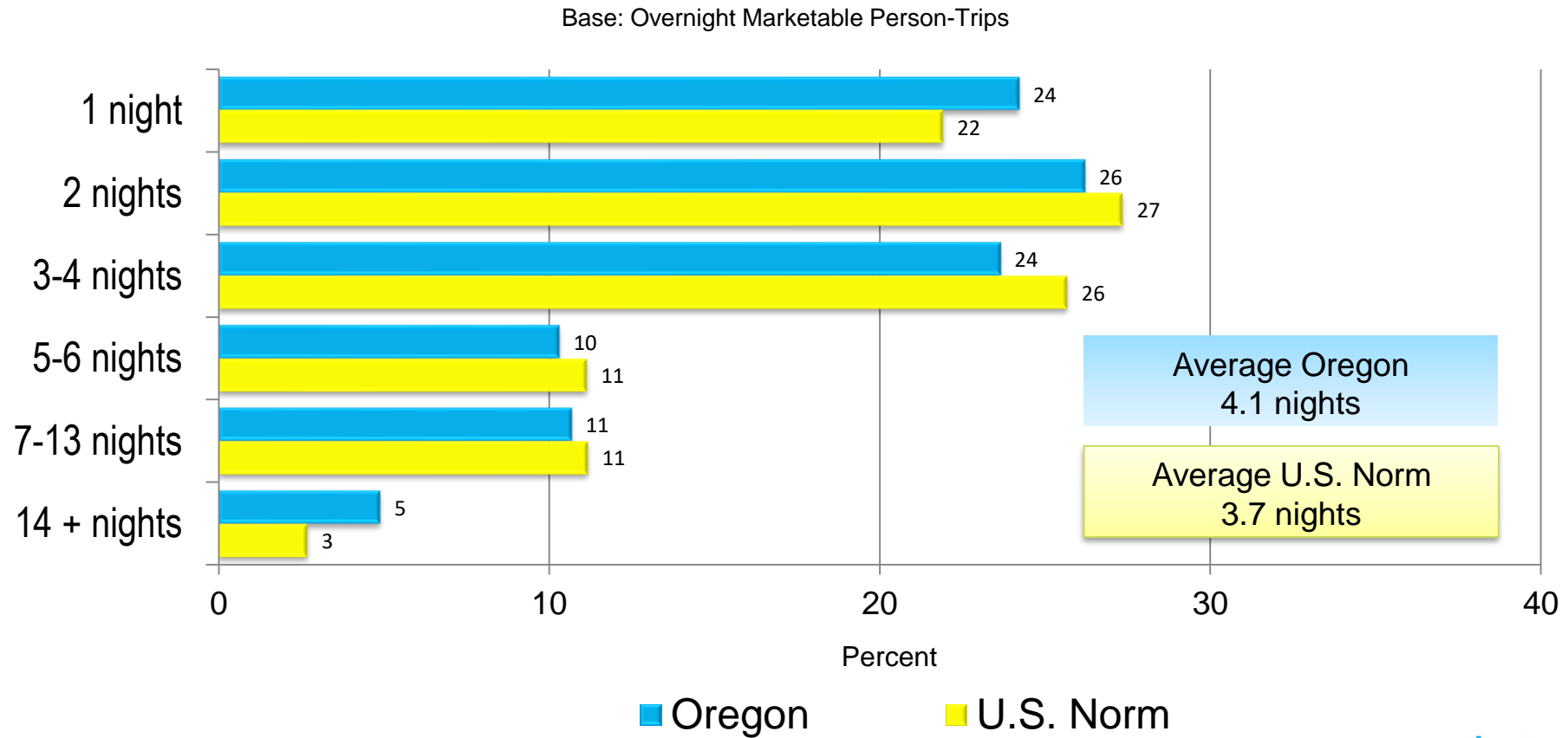
Devices Used for Trip Planning



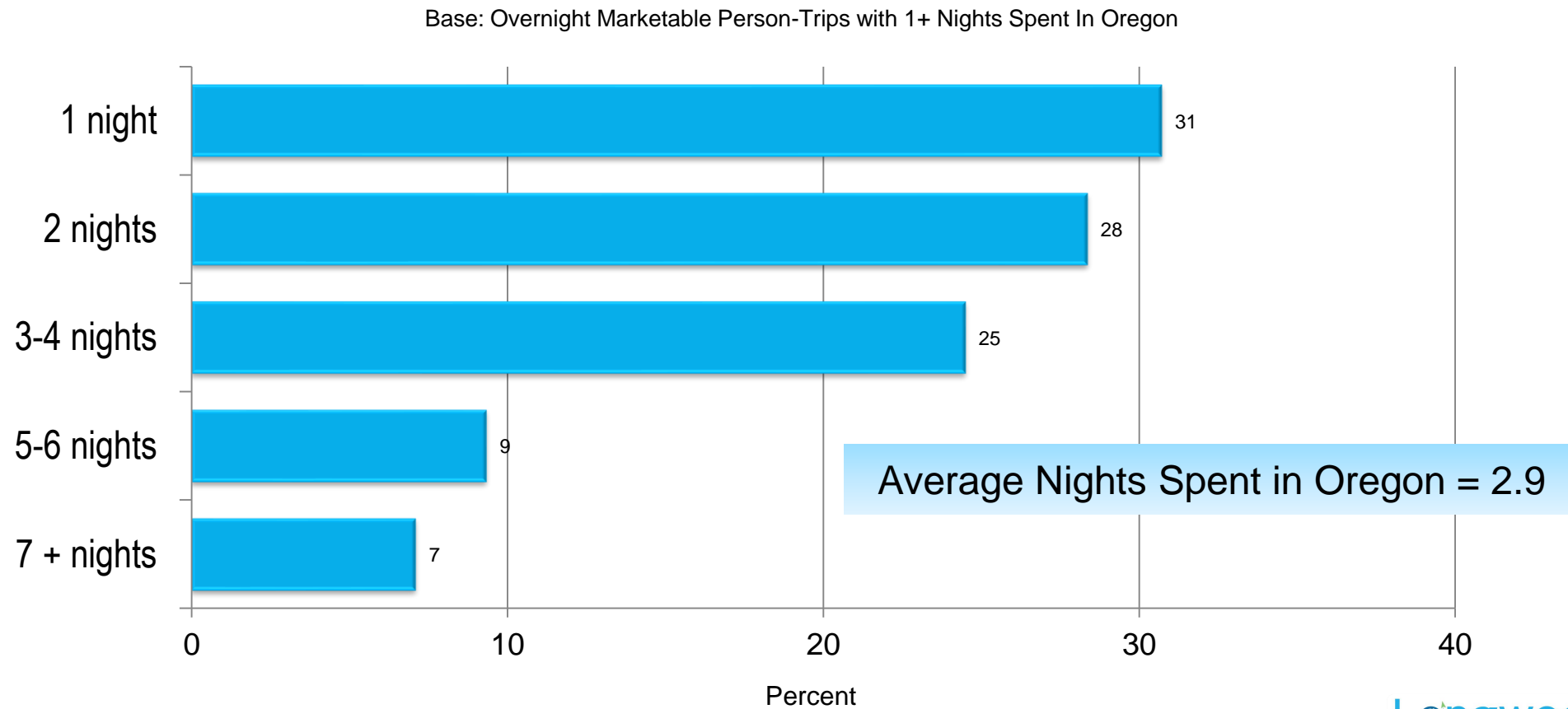
Devices Used During Trip



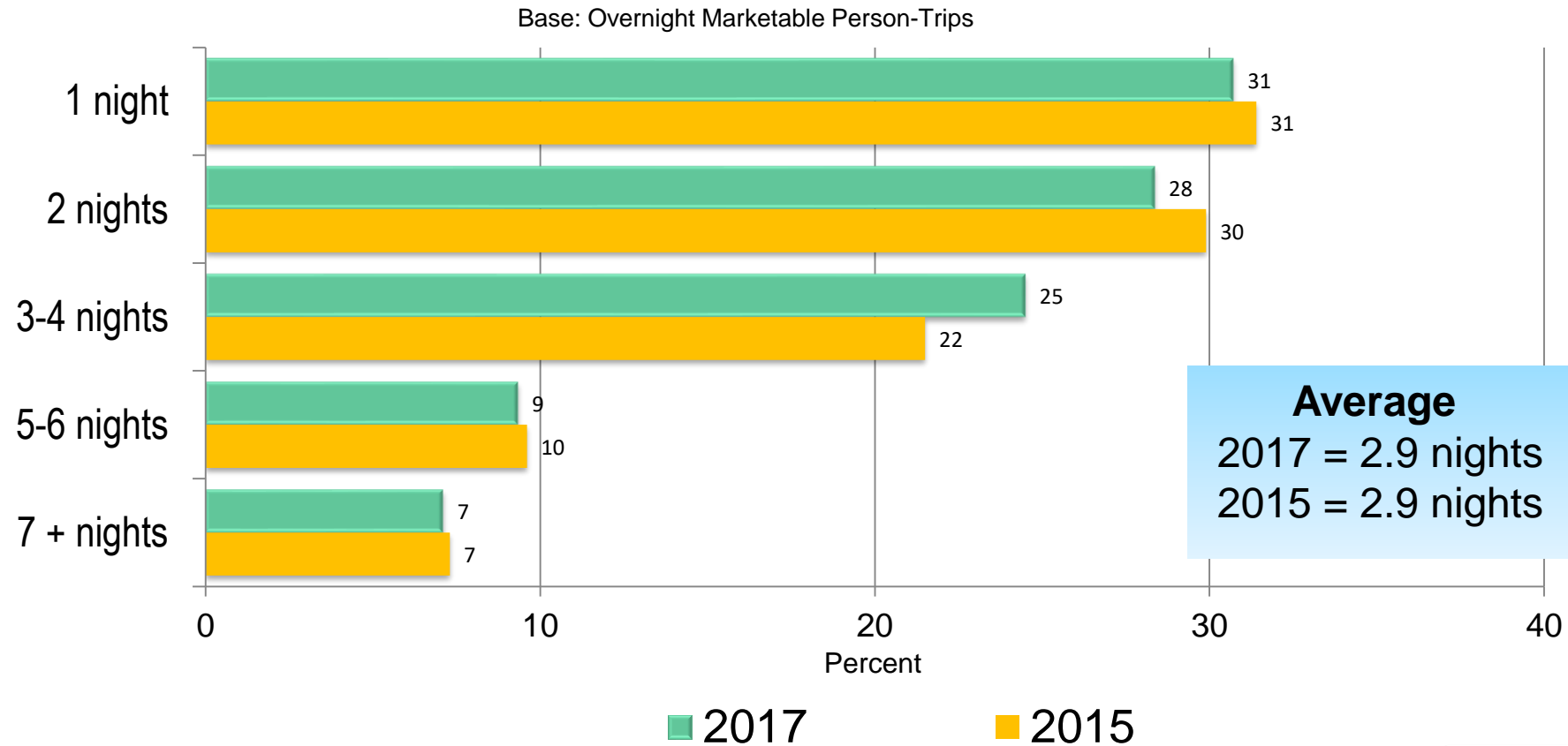
Total Nights Away on Trip



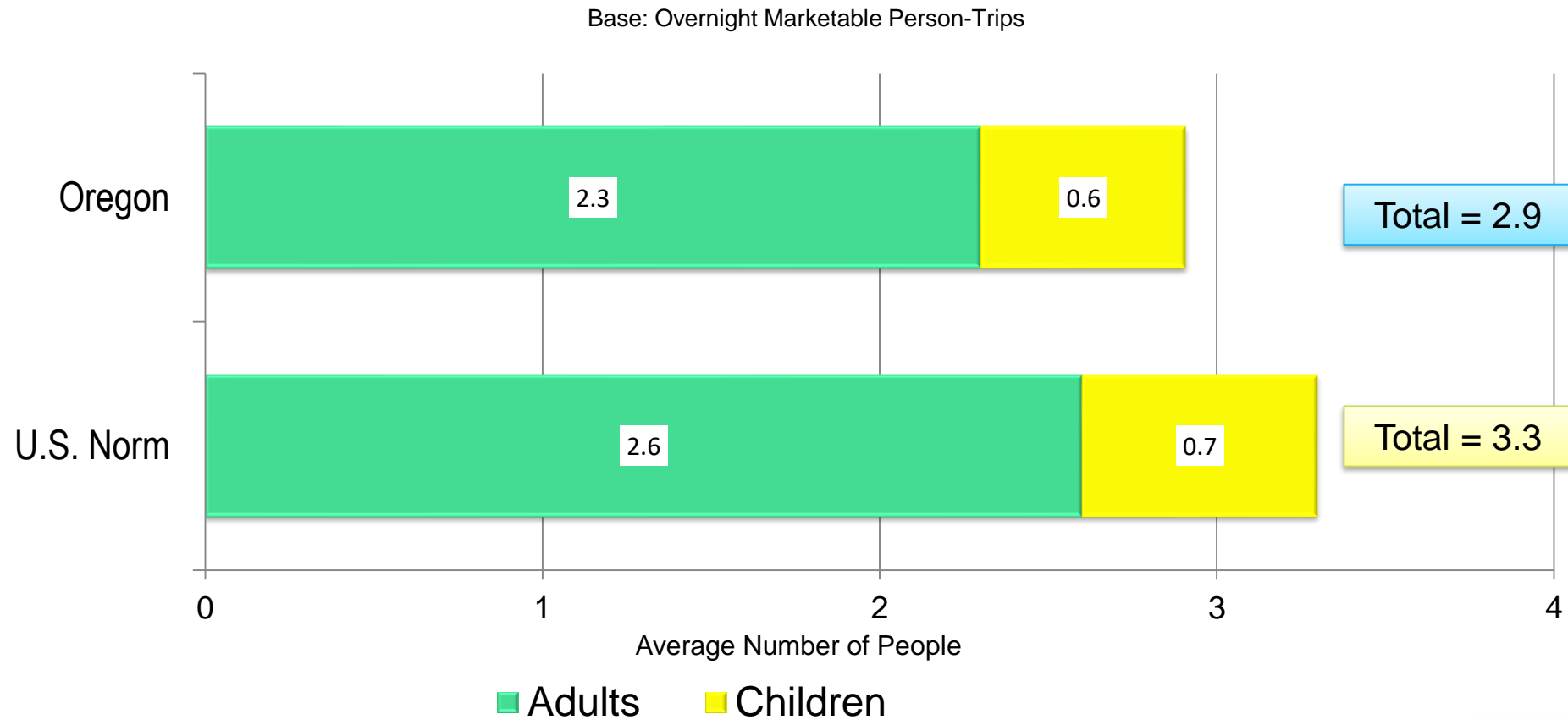
Number of Nights Spent in Oregon



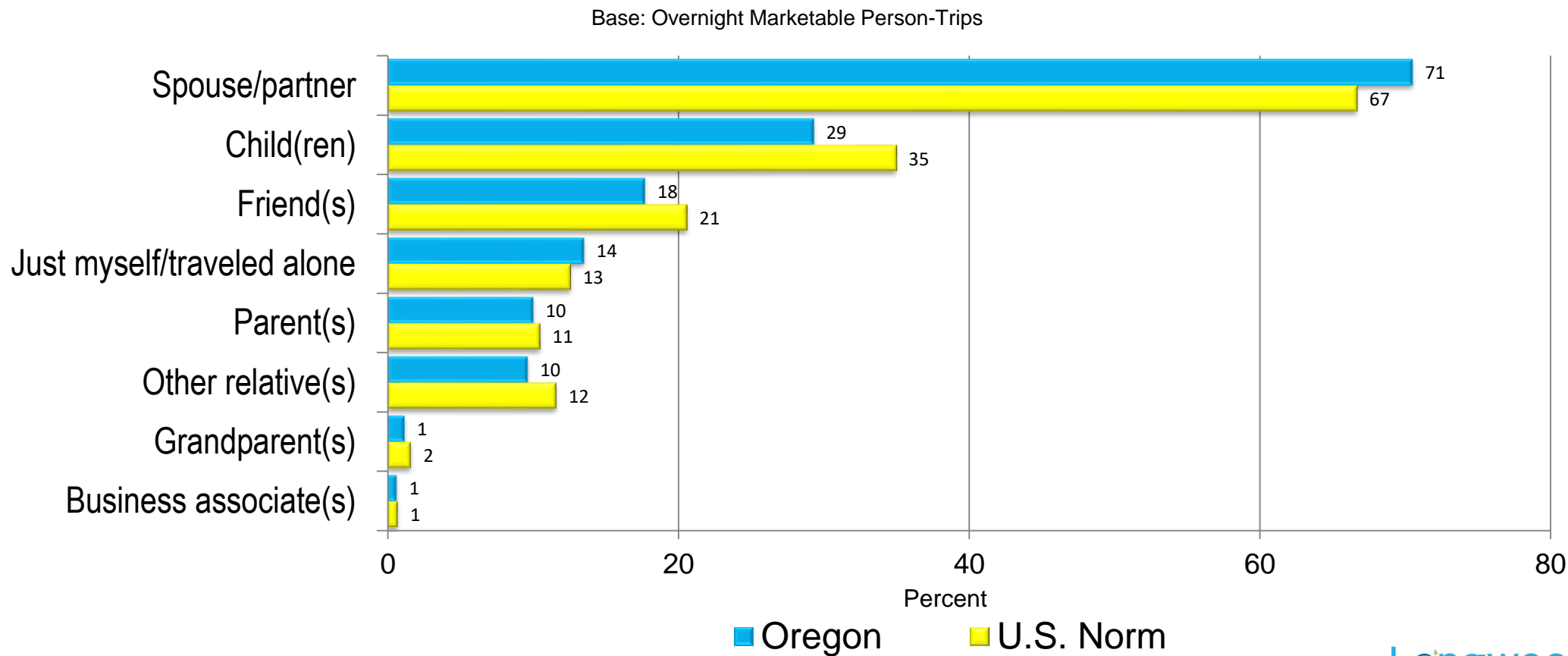
Number of Nights Spent in Oregon - 2017 vs. 2015



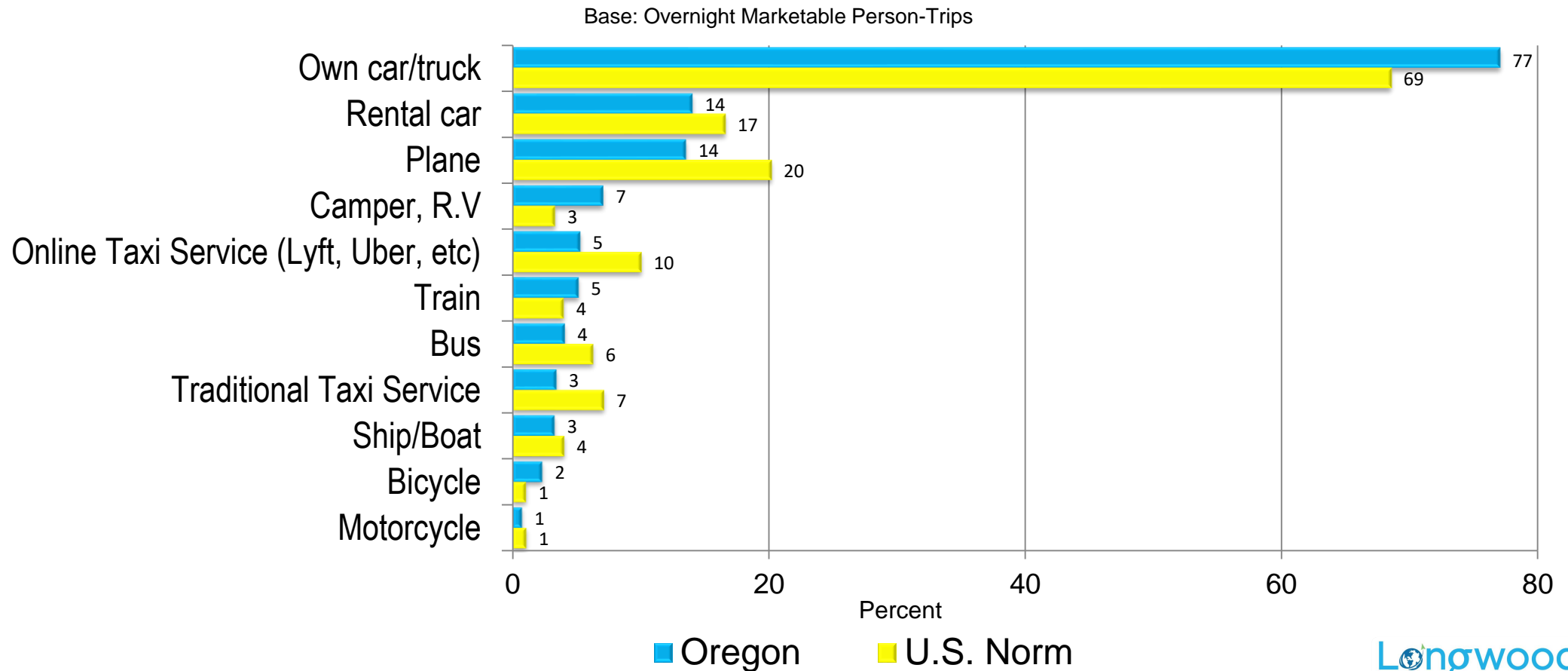
Size of Travel Party



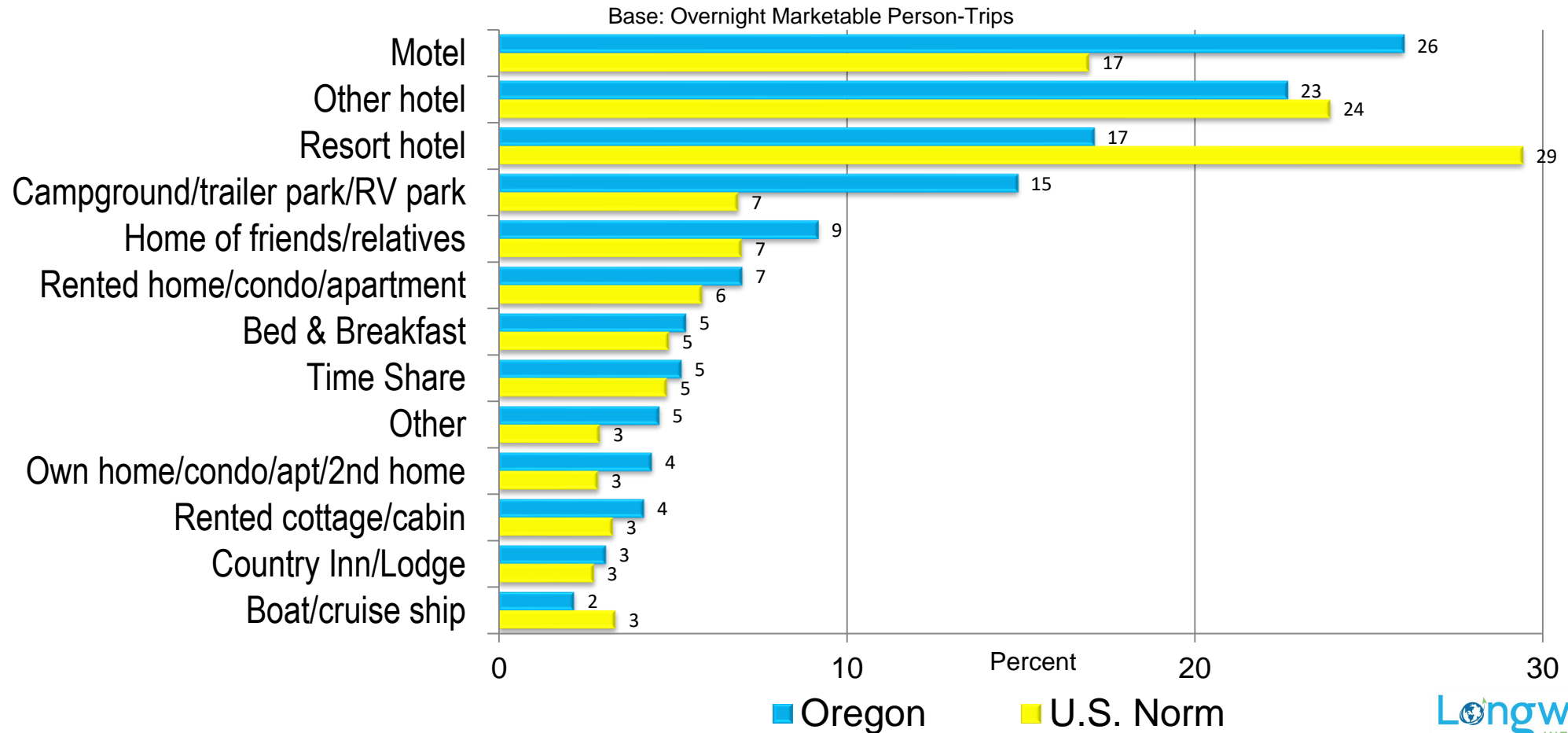
Composition of Immediate Travel Party



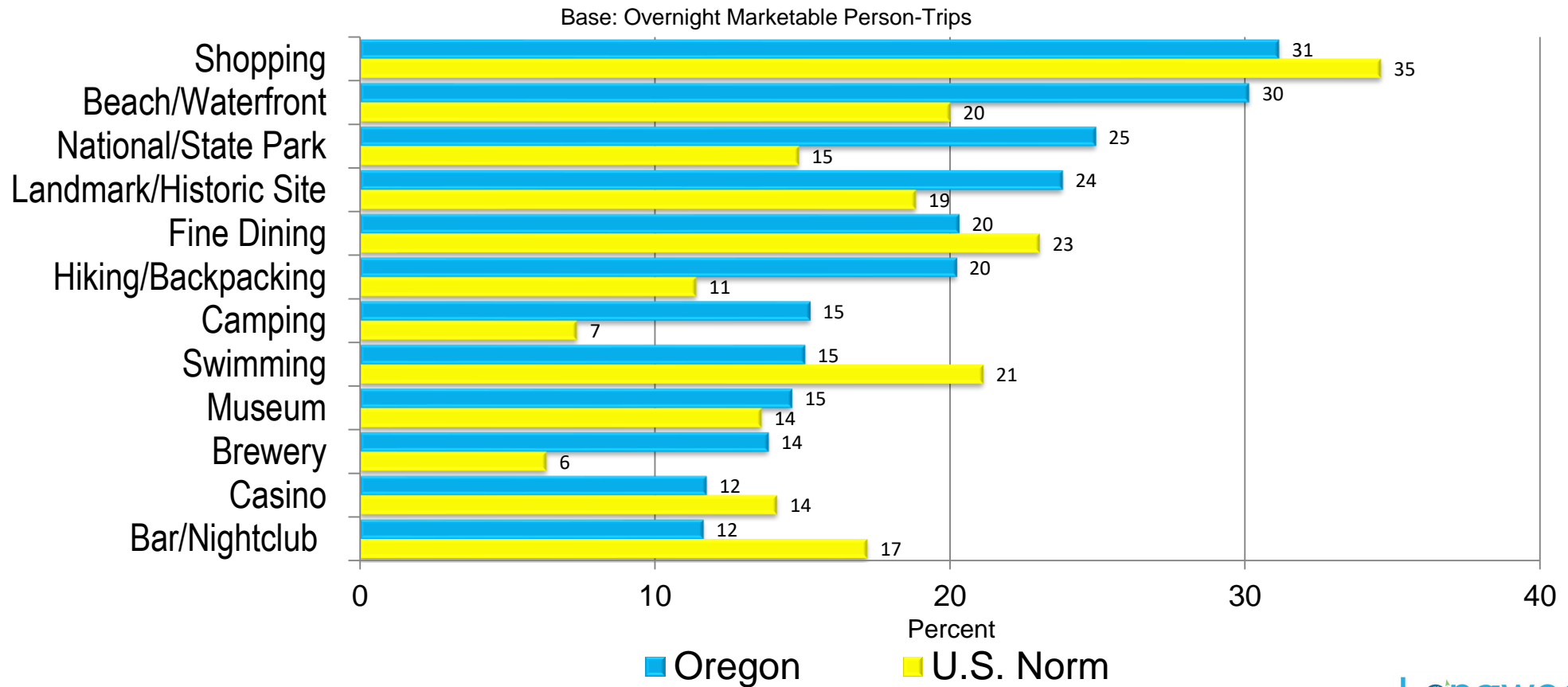
Transportation



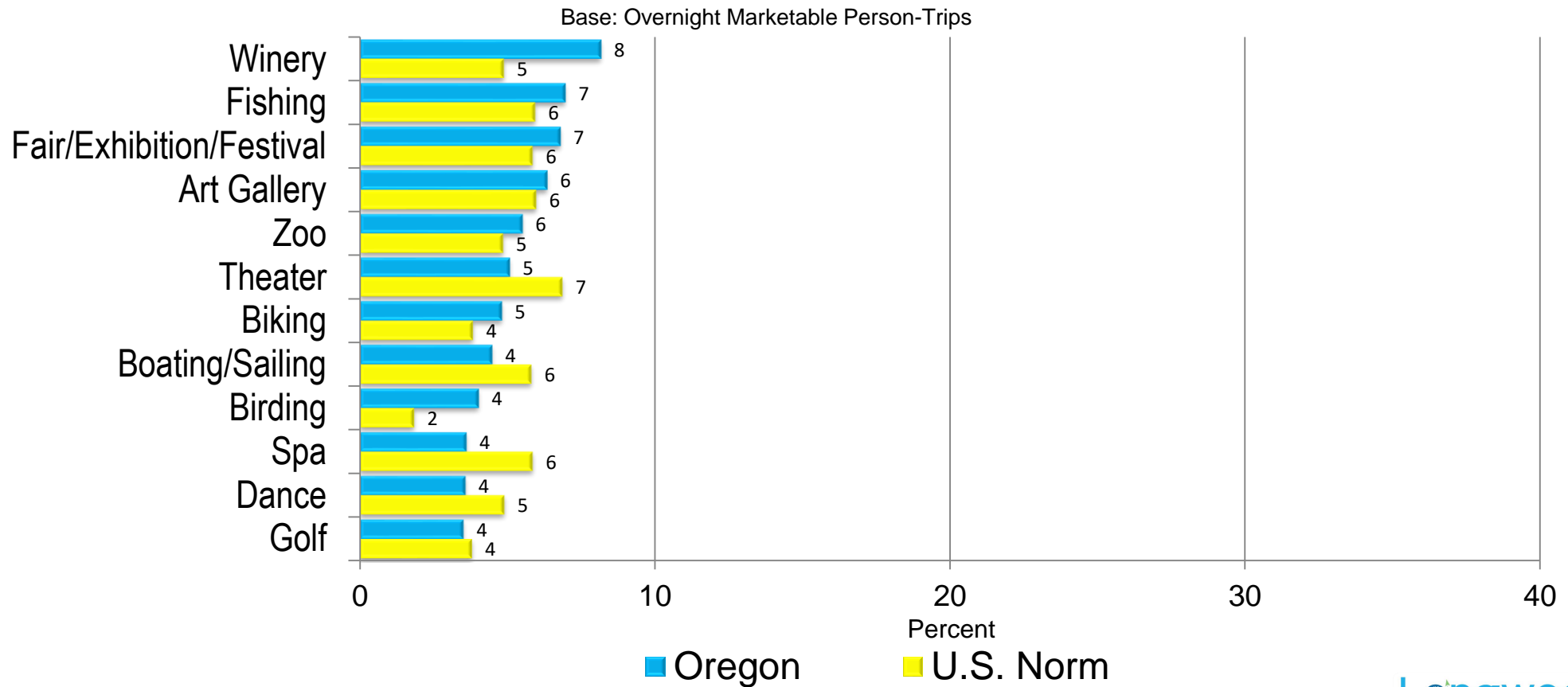
Accommodations



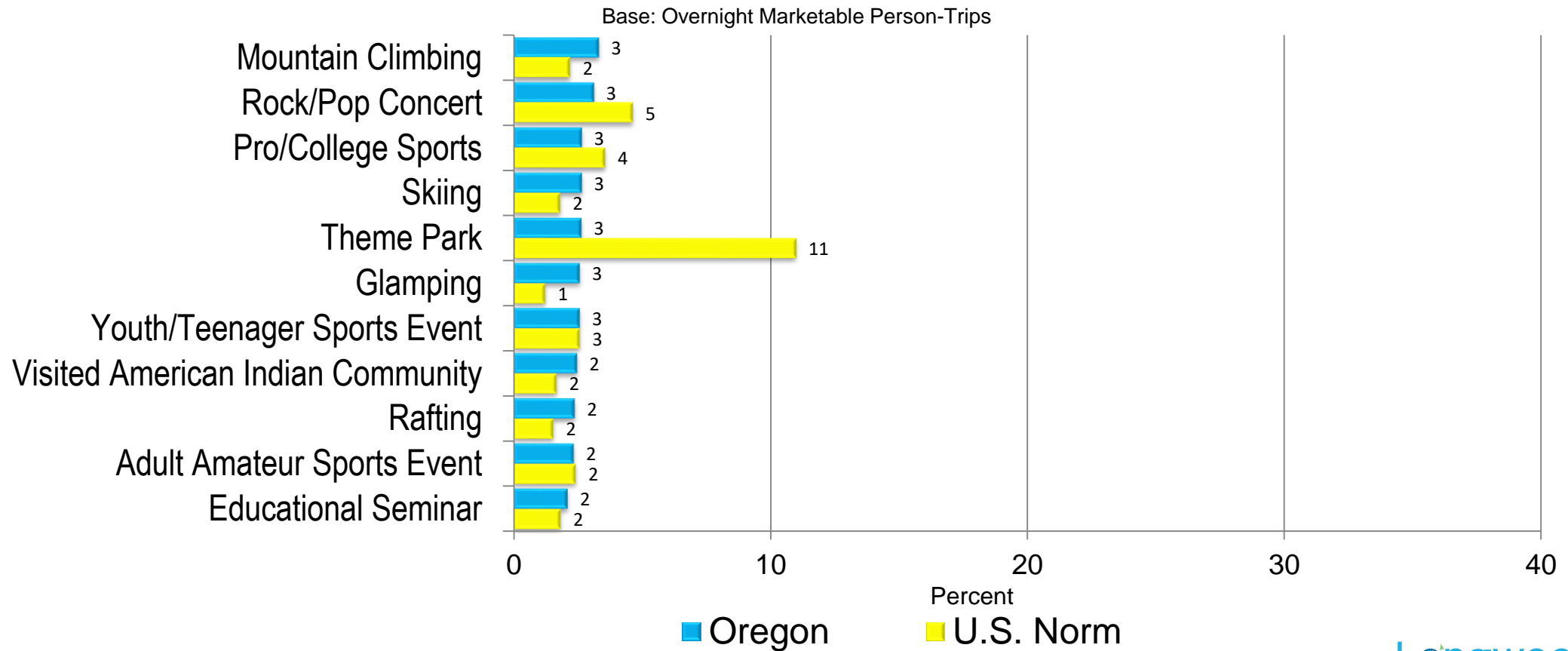
Activities and Experiences



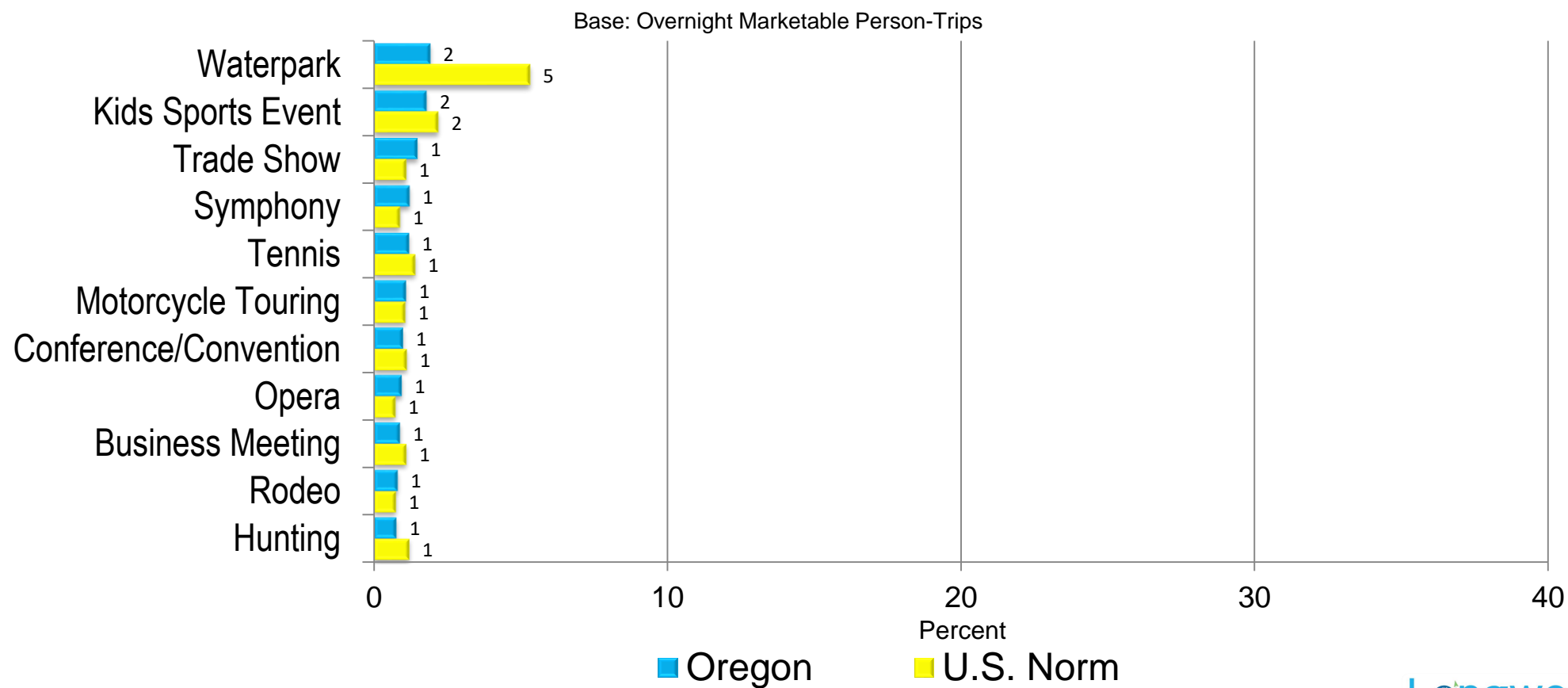
Activities and Experiences (Cont'd)



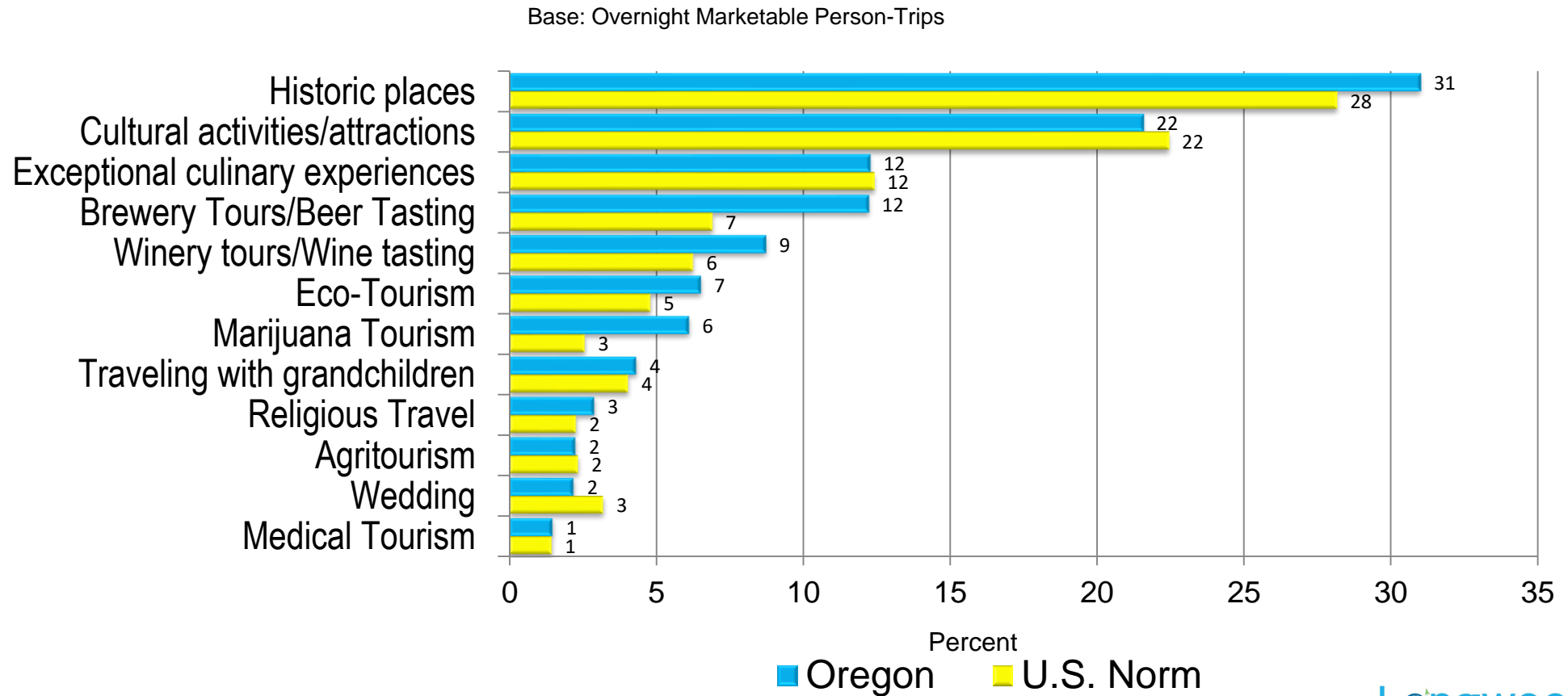
Activities and Experiences (Cont'd)



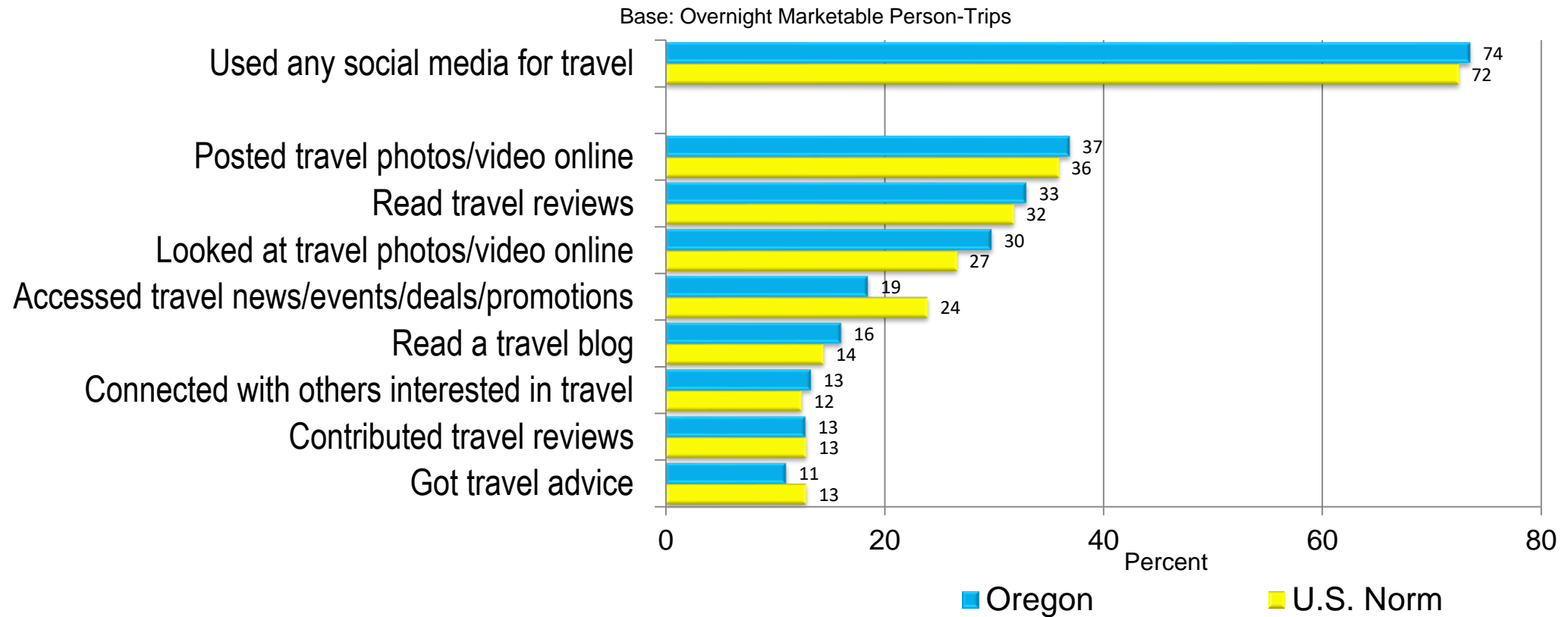
Activities and Experiences (Cont'd)



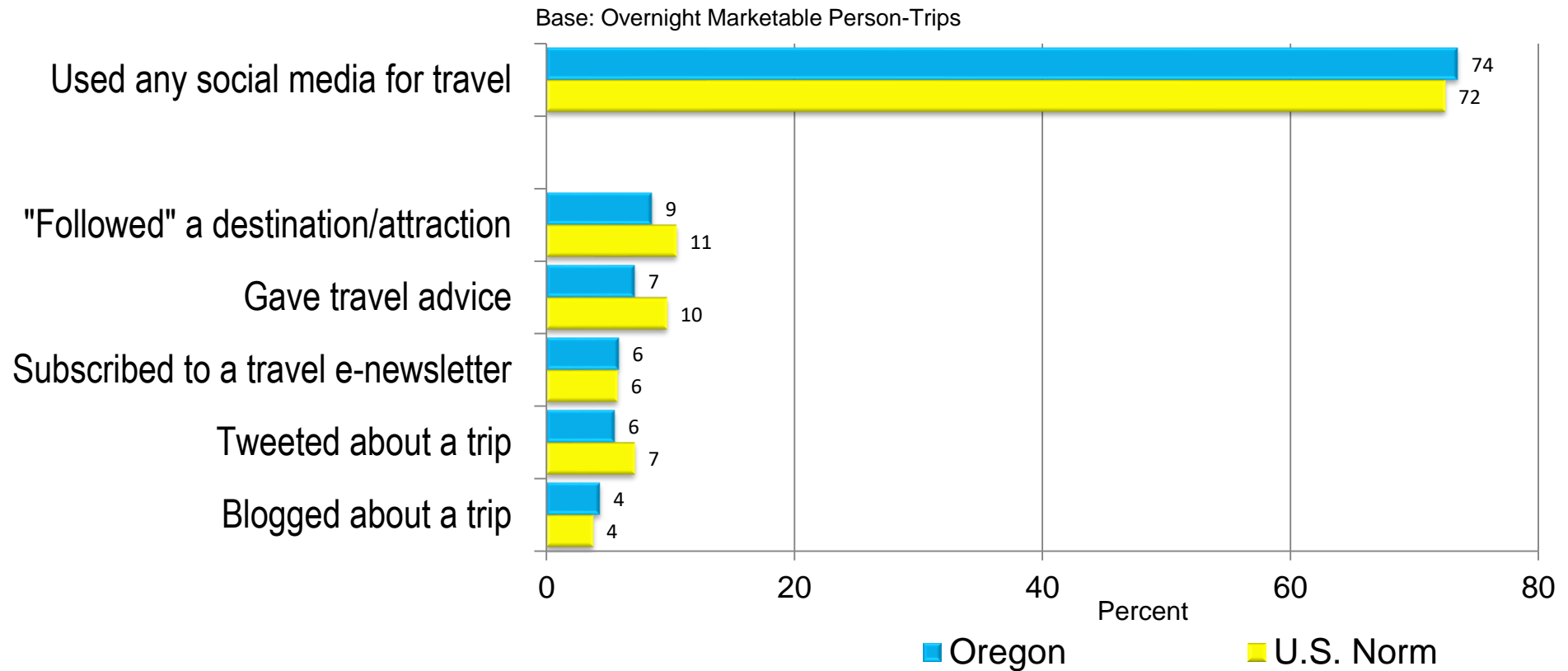
Activities of Special Interest



Online Social Media Use by Travelers

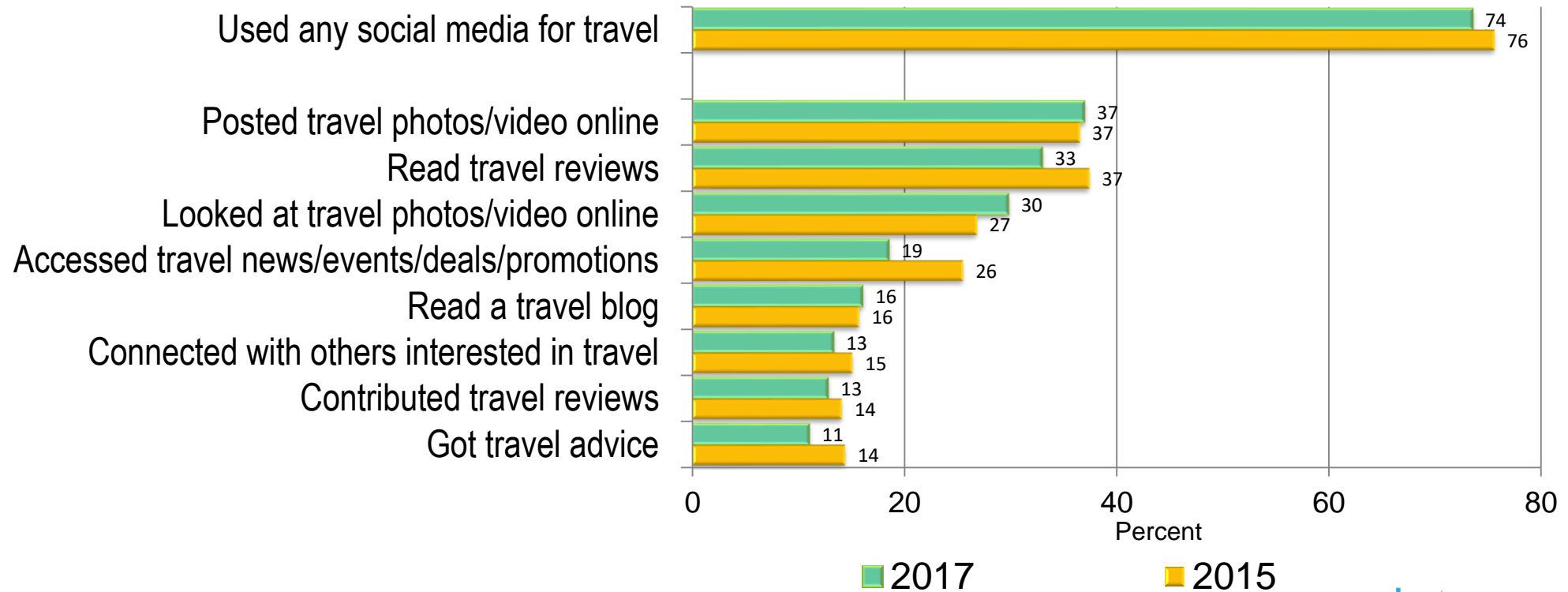


Online Social Media Use by Travelers (Cont'd)

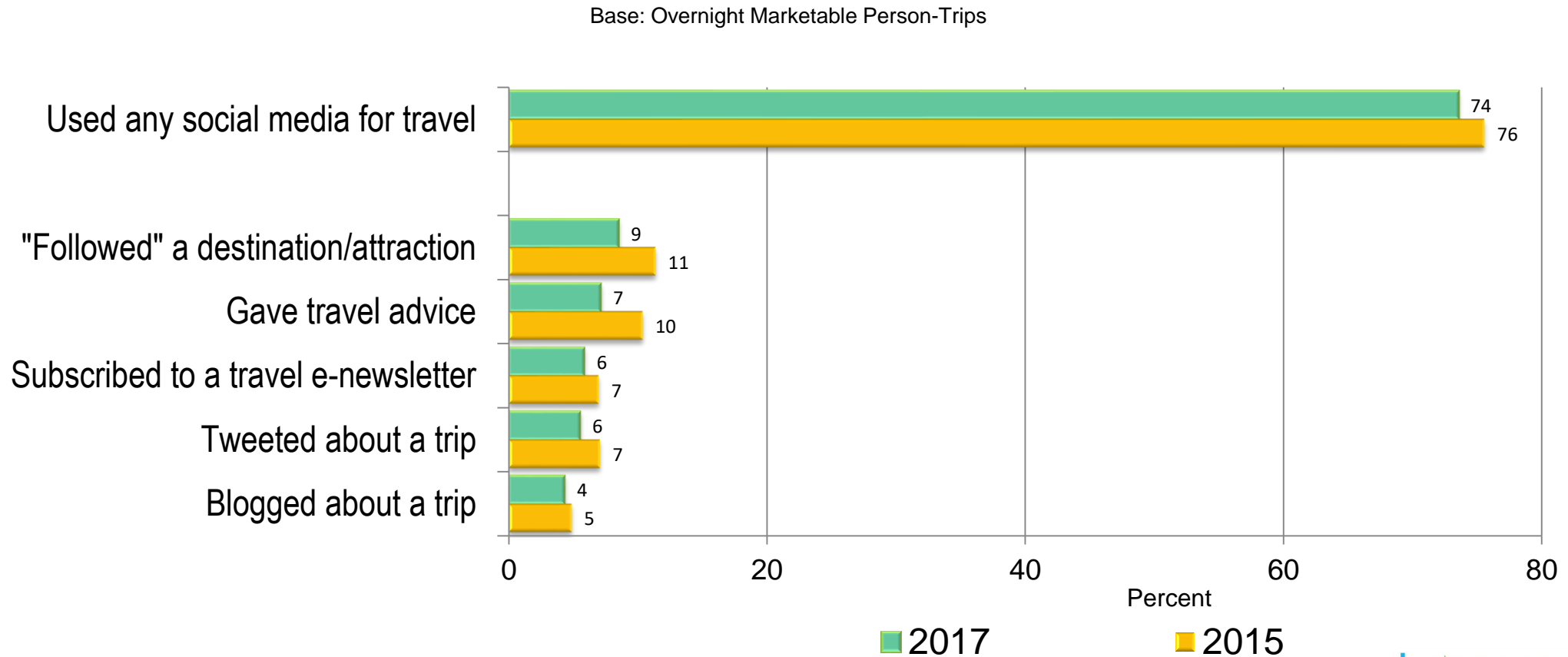


Online Social Media Use by Travelers – 2017 vs. 2015

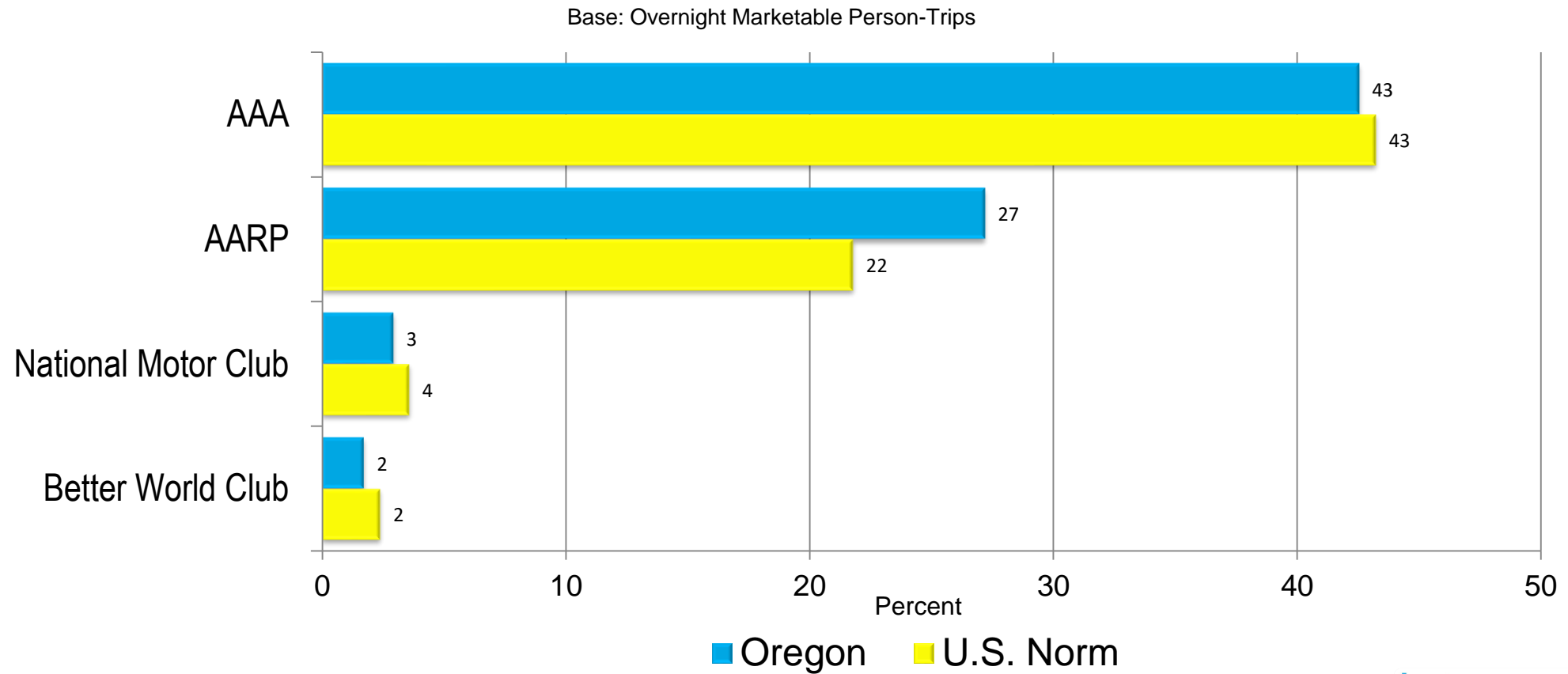
Base: Overnight Marketable Person-Trips



Online Social Media Use by Travelers – 2017 vs. 2015 (Cont'd)



Organization Membership

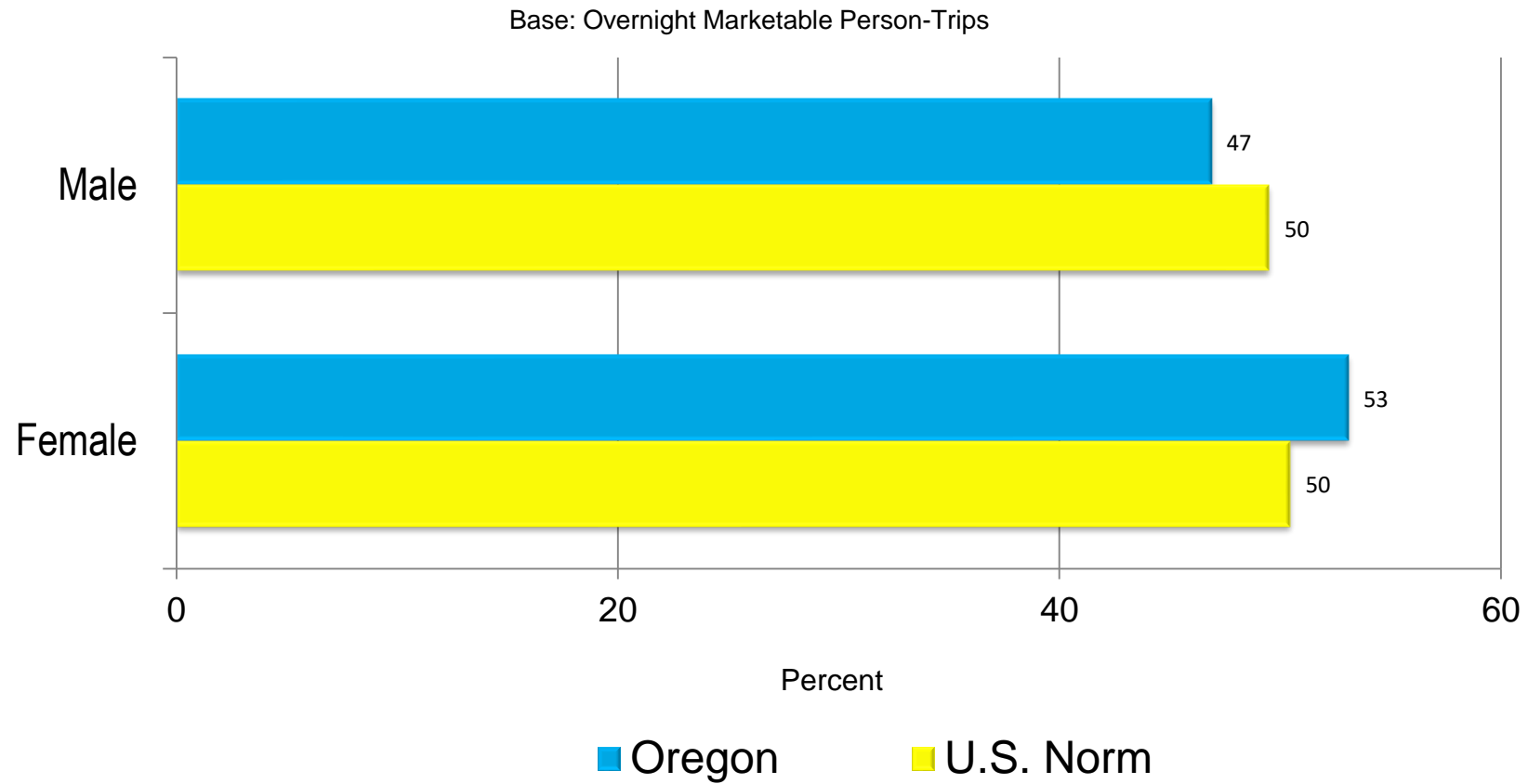




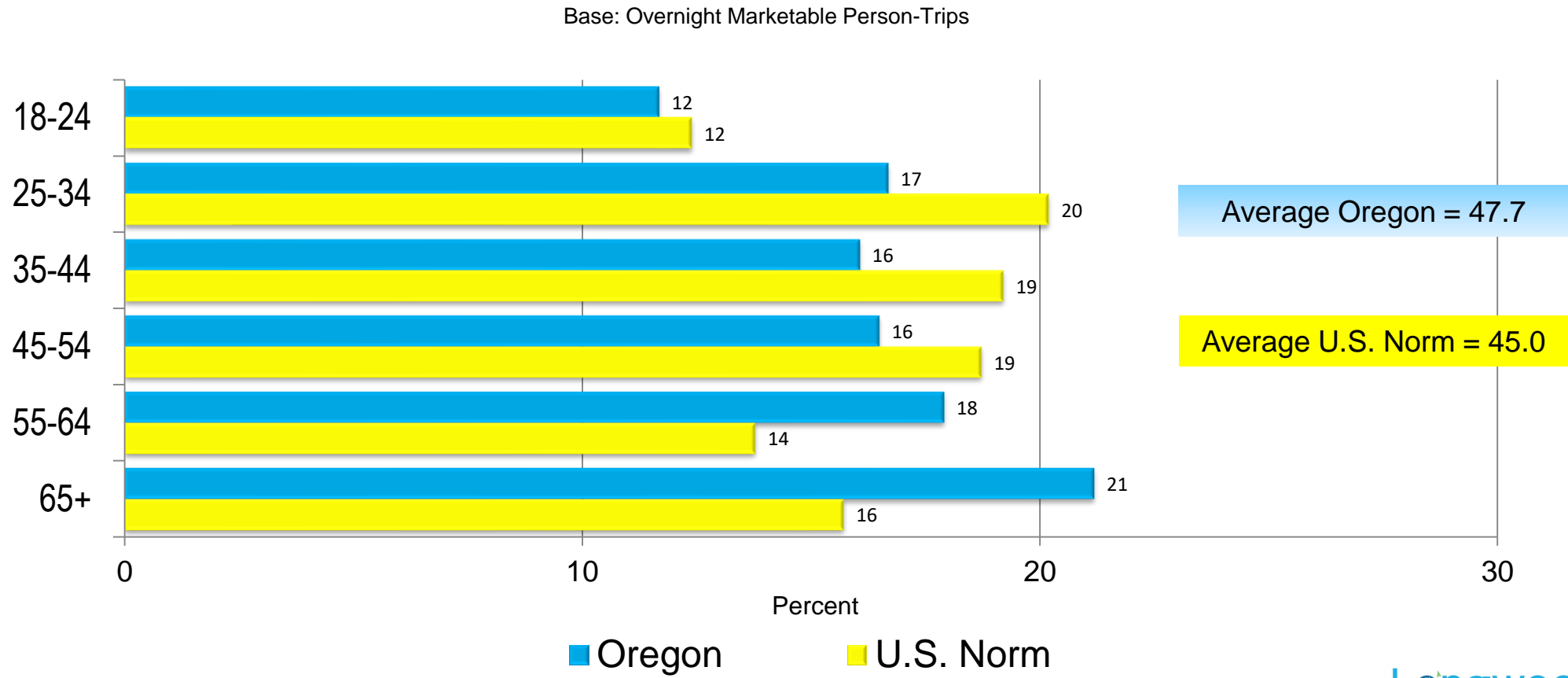
Traveler Demographic Profile of Overnight Marketable Trips



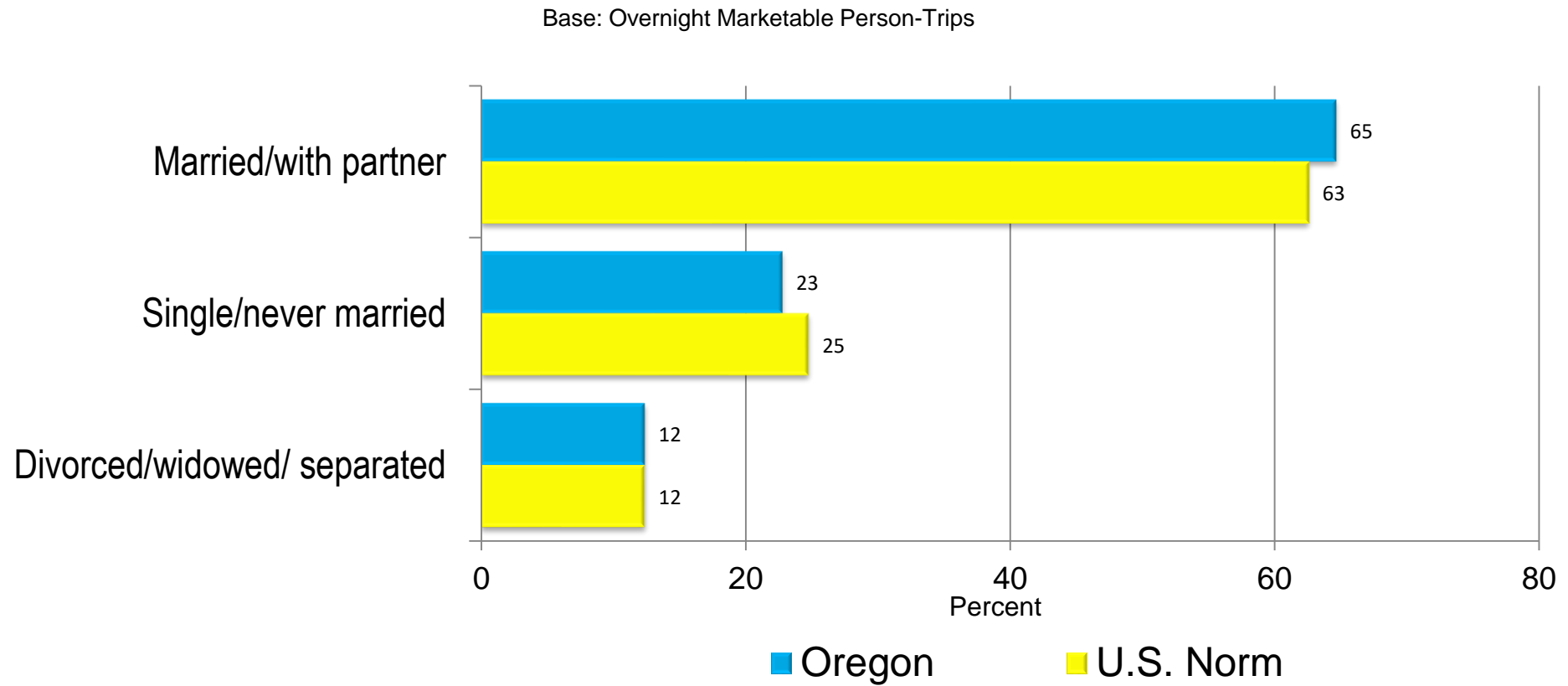
Gender



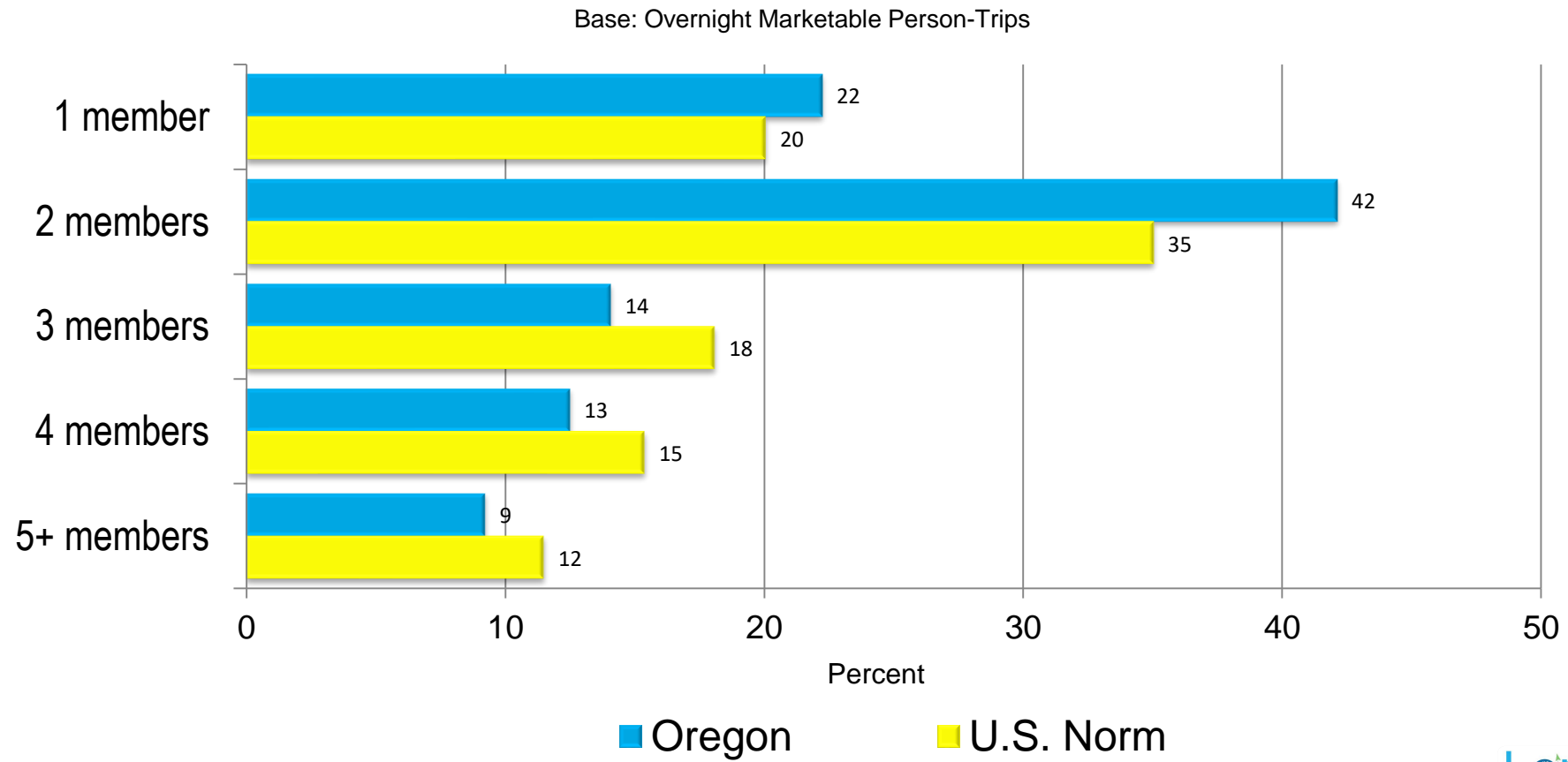
Age



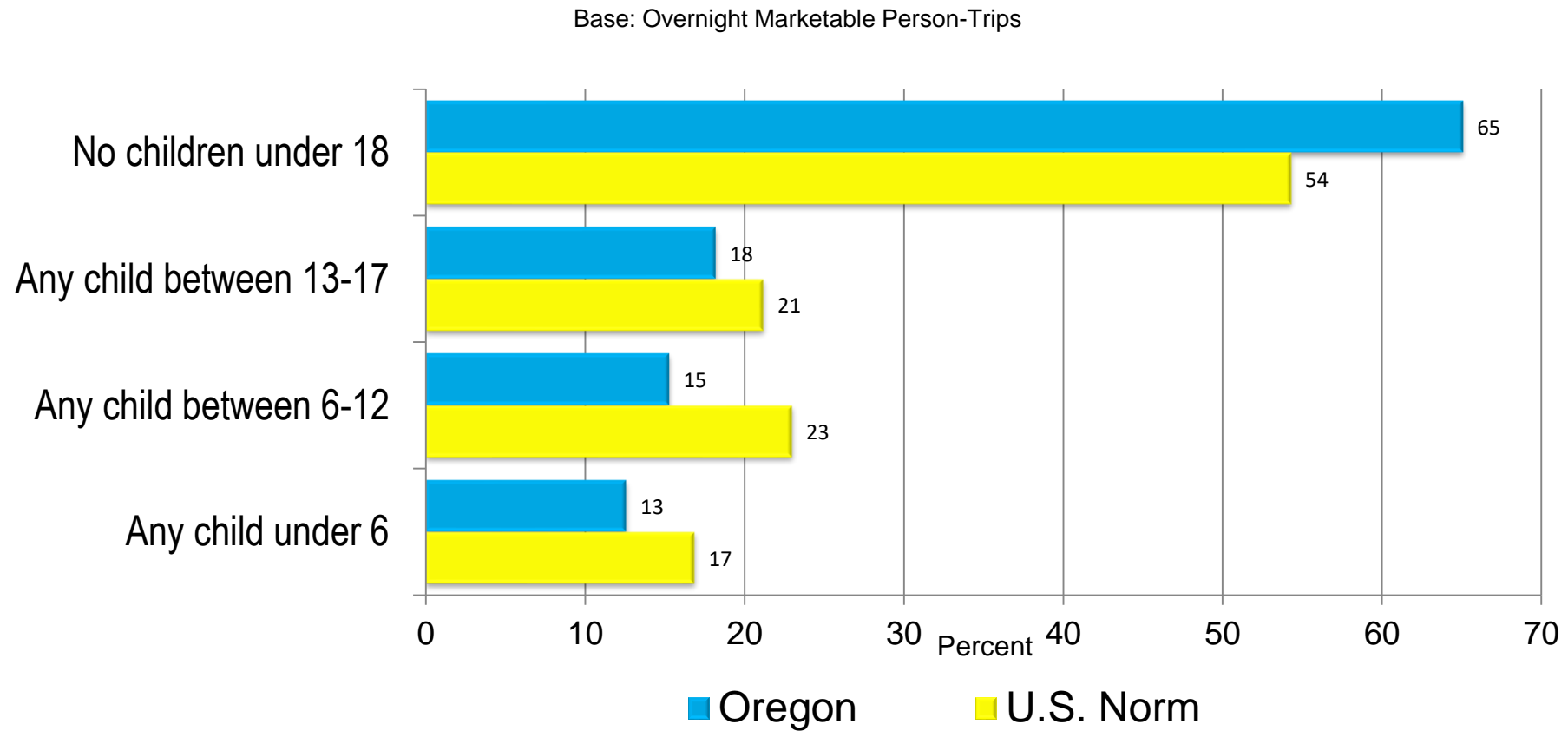
Marital Status



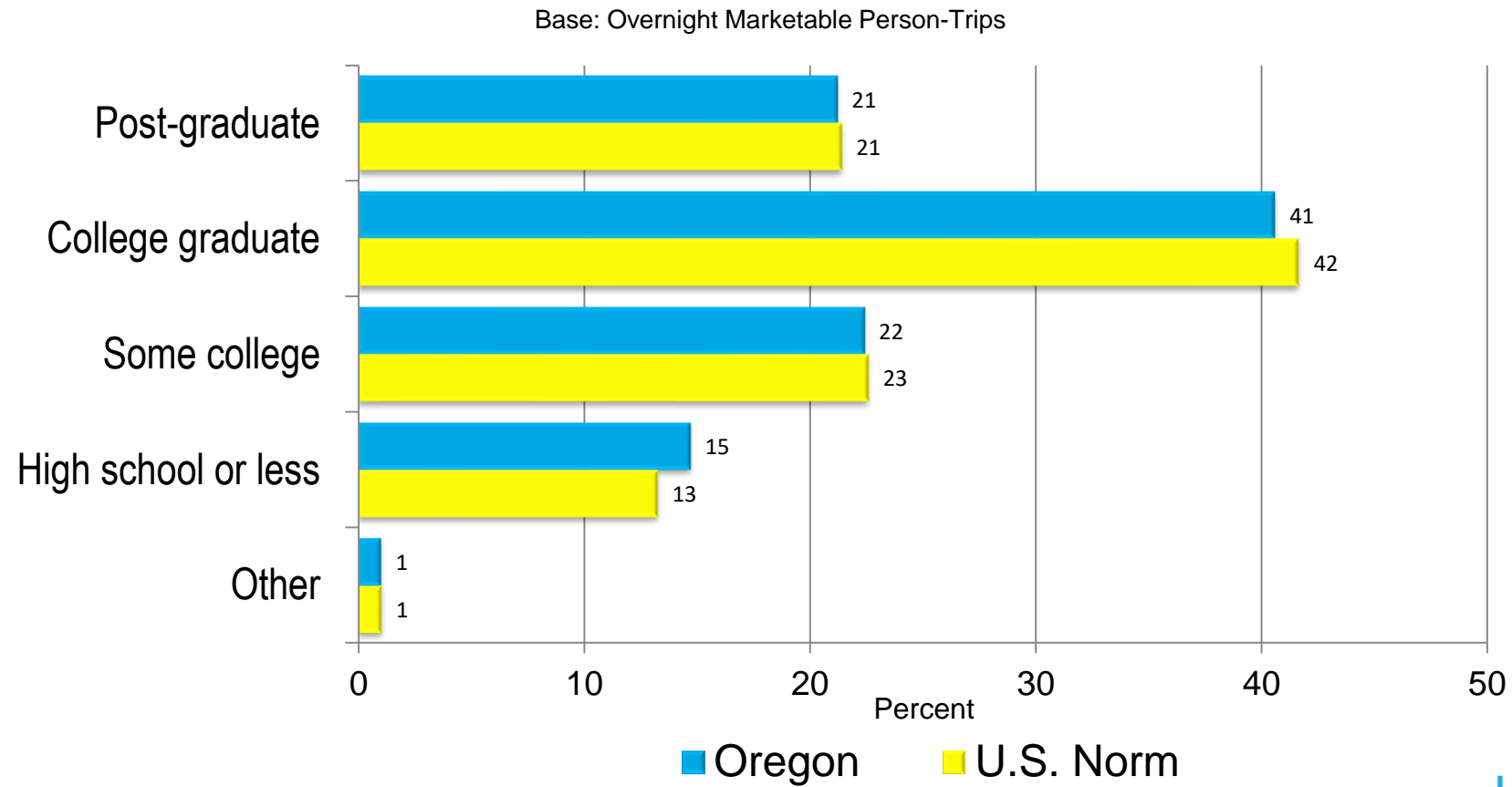
Household Size



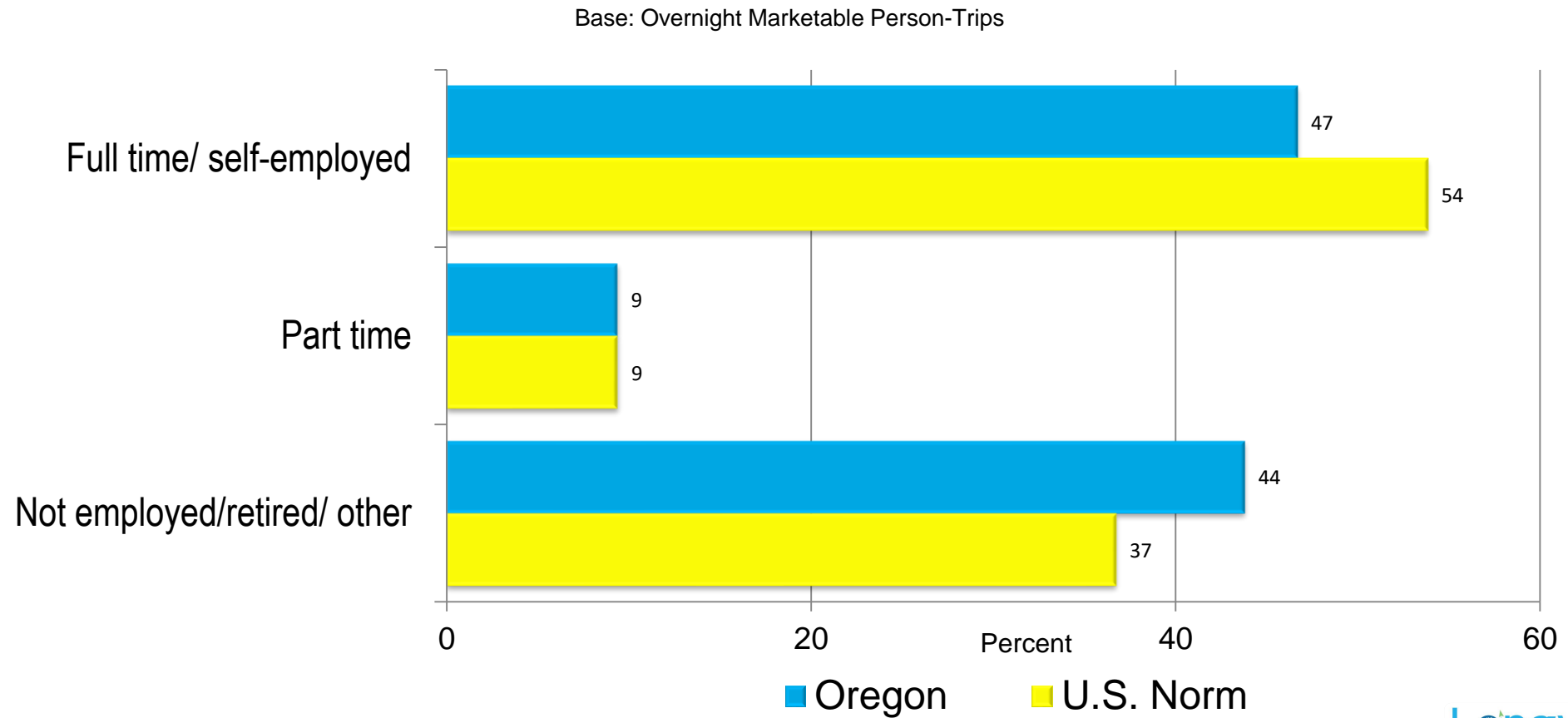
Children in Household



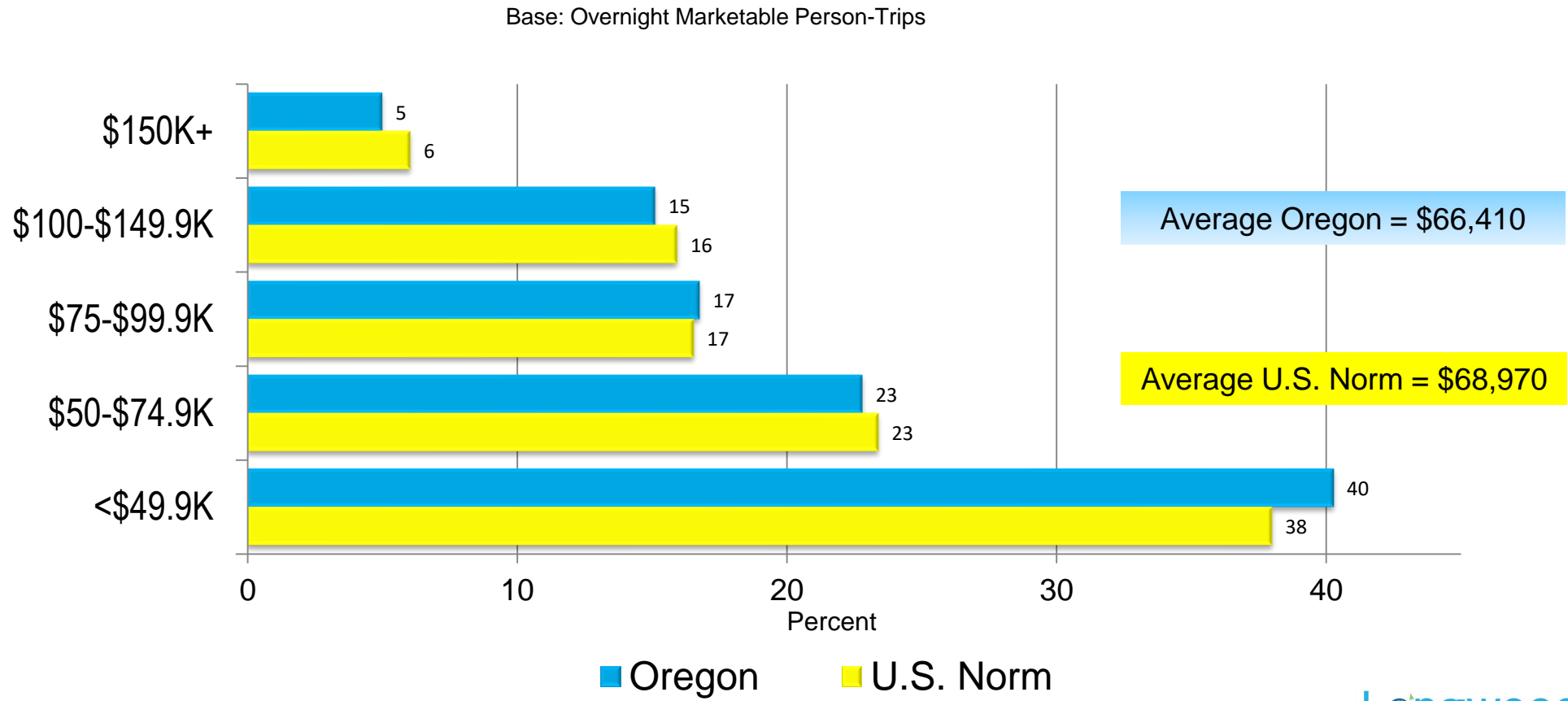
Education



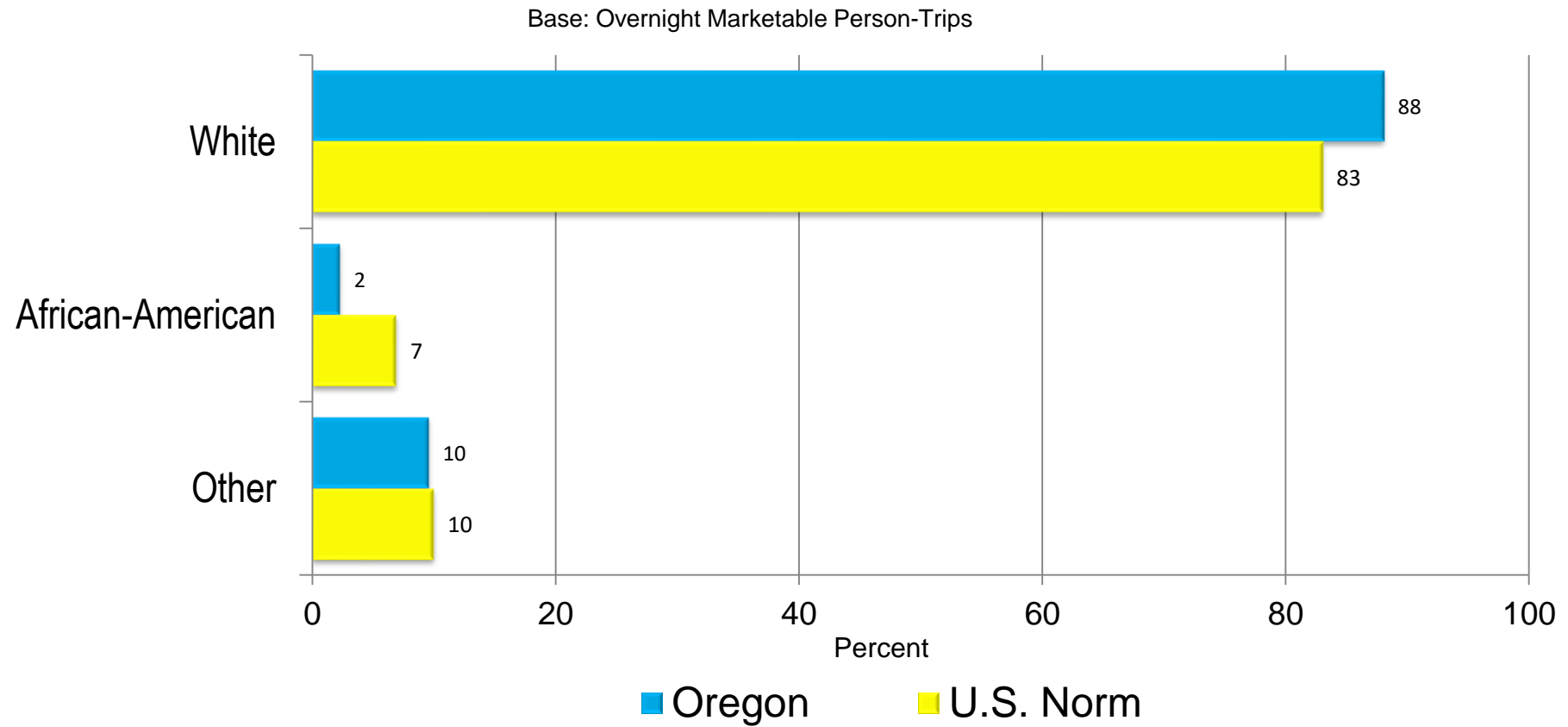
Employment



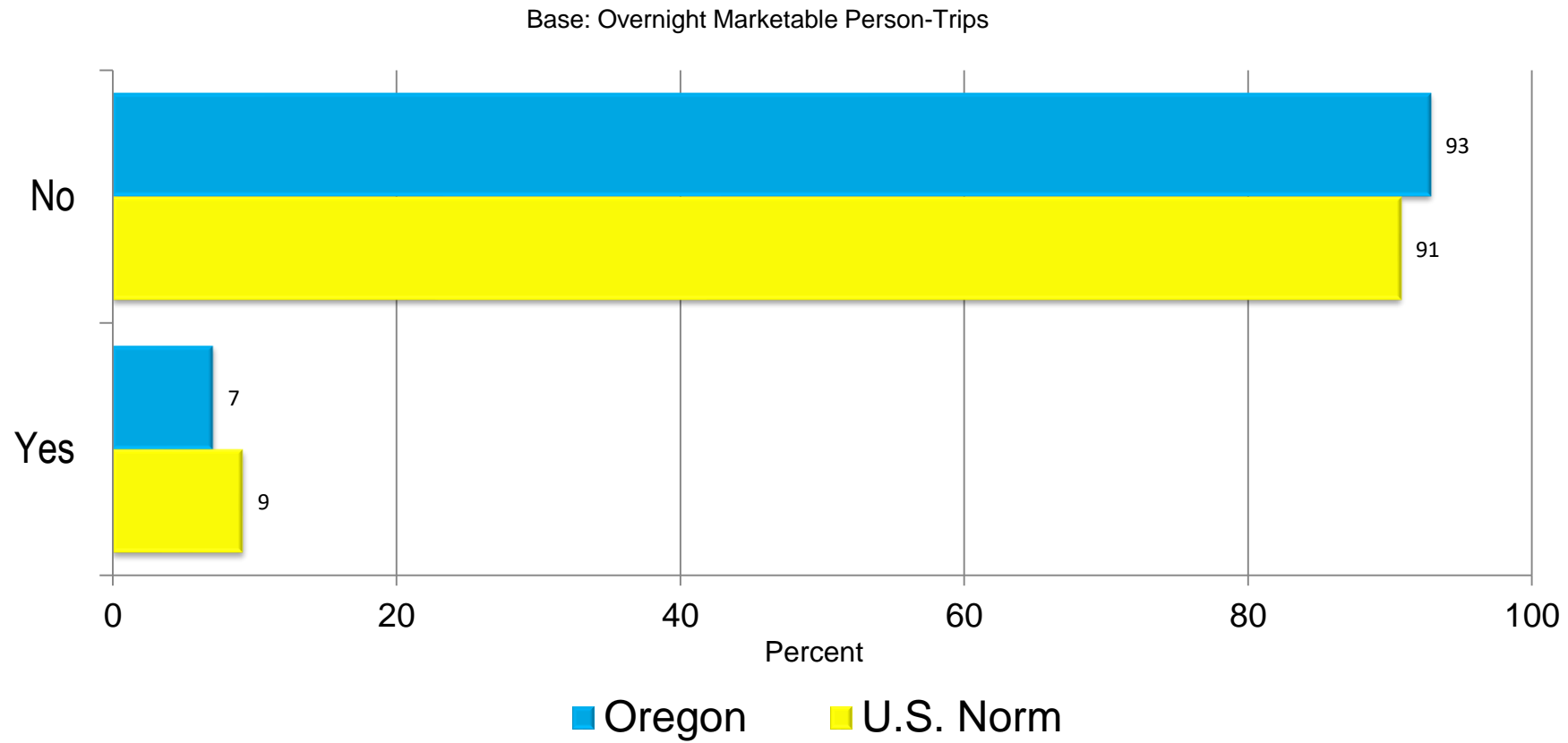
Household Income



Race



Hispanic Background



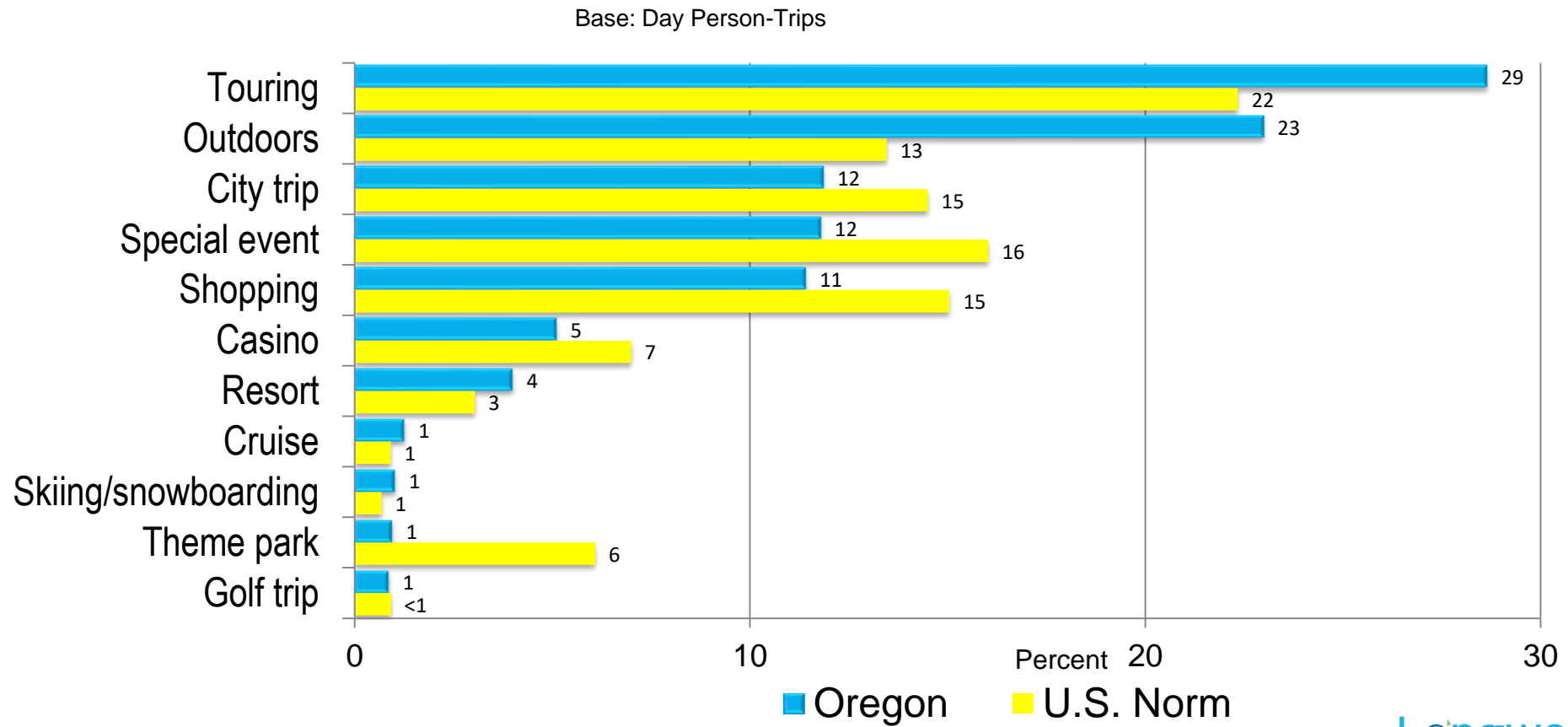


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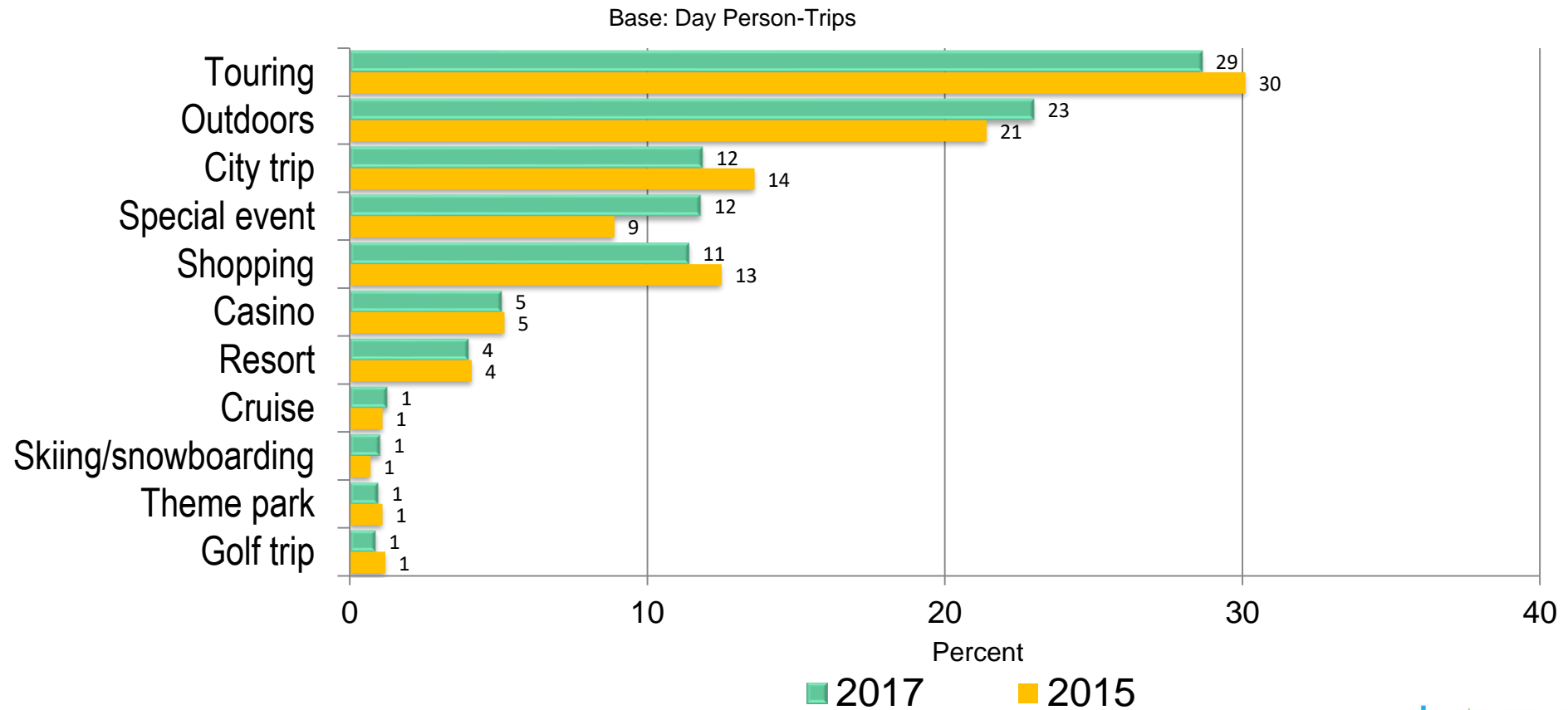
Day Trip Characteristics



Main Purpose of Leisure Trip — Oregon vs. National Norm

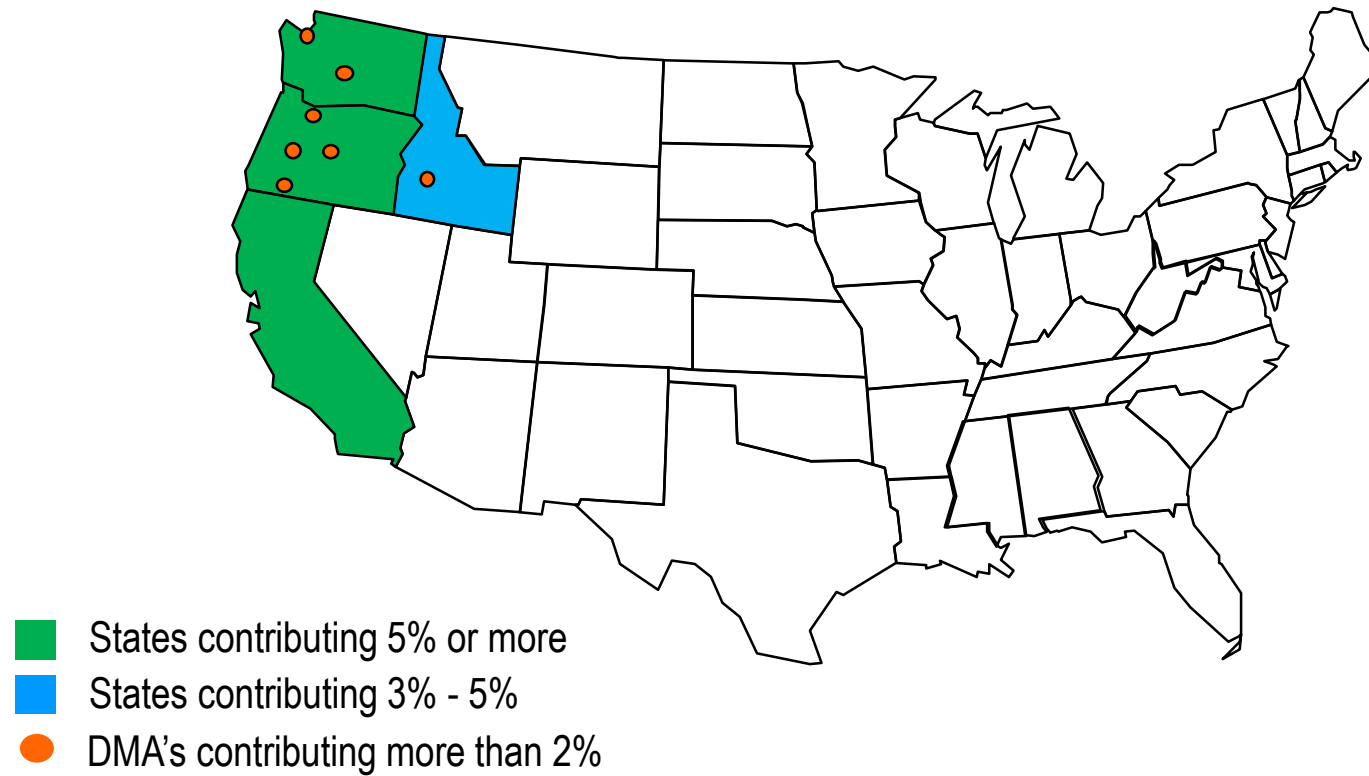


Main Purpose of Day Leisure Trip — 2017 vs. 2015

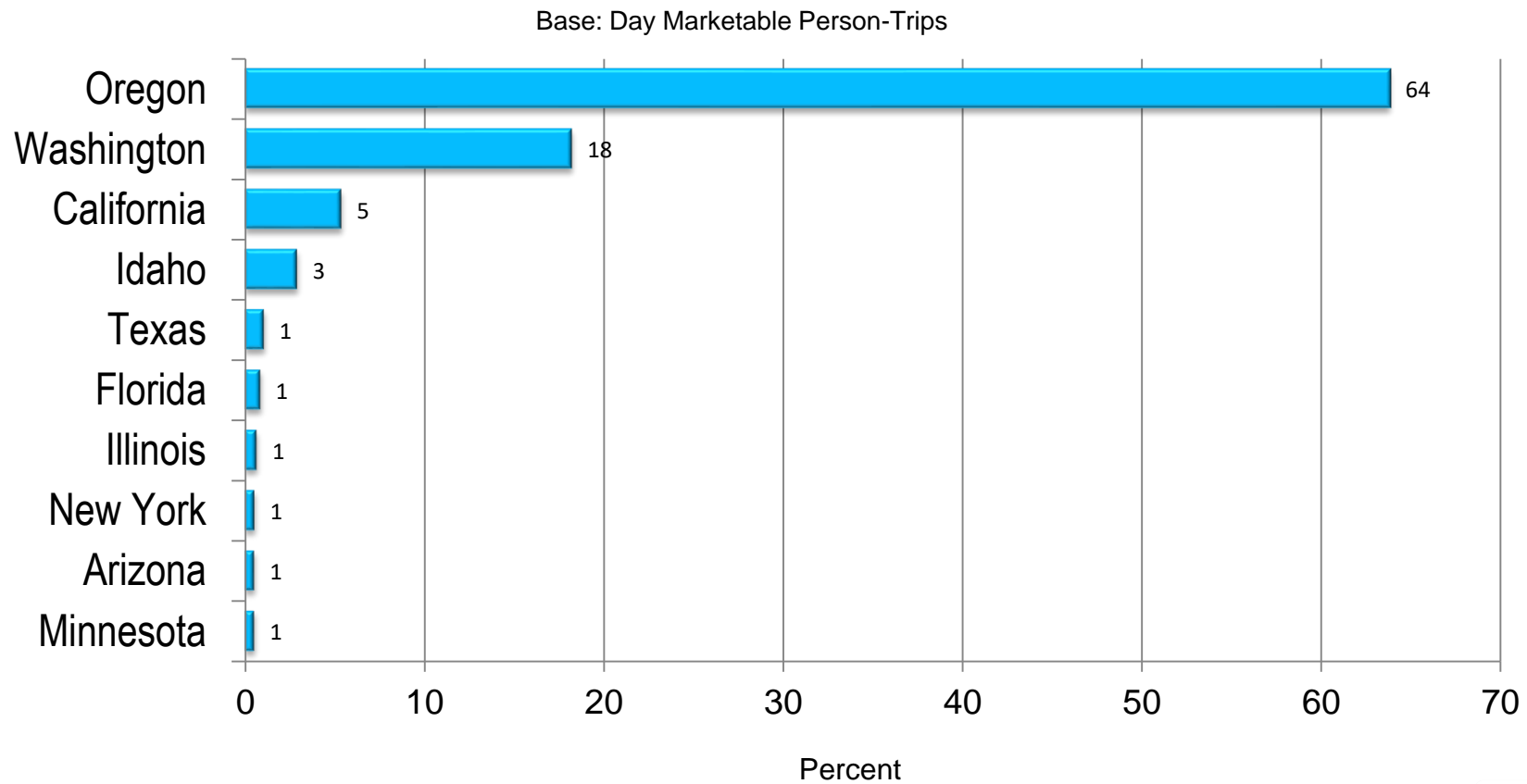


Sources of Business

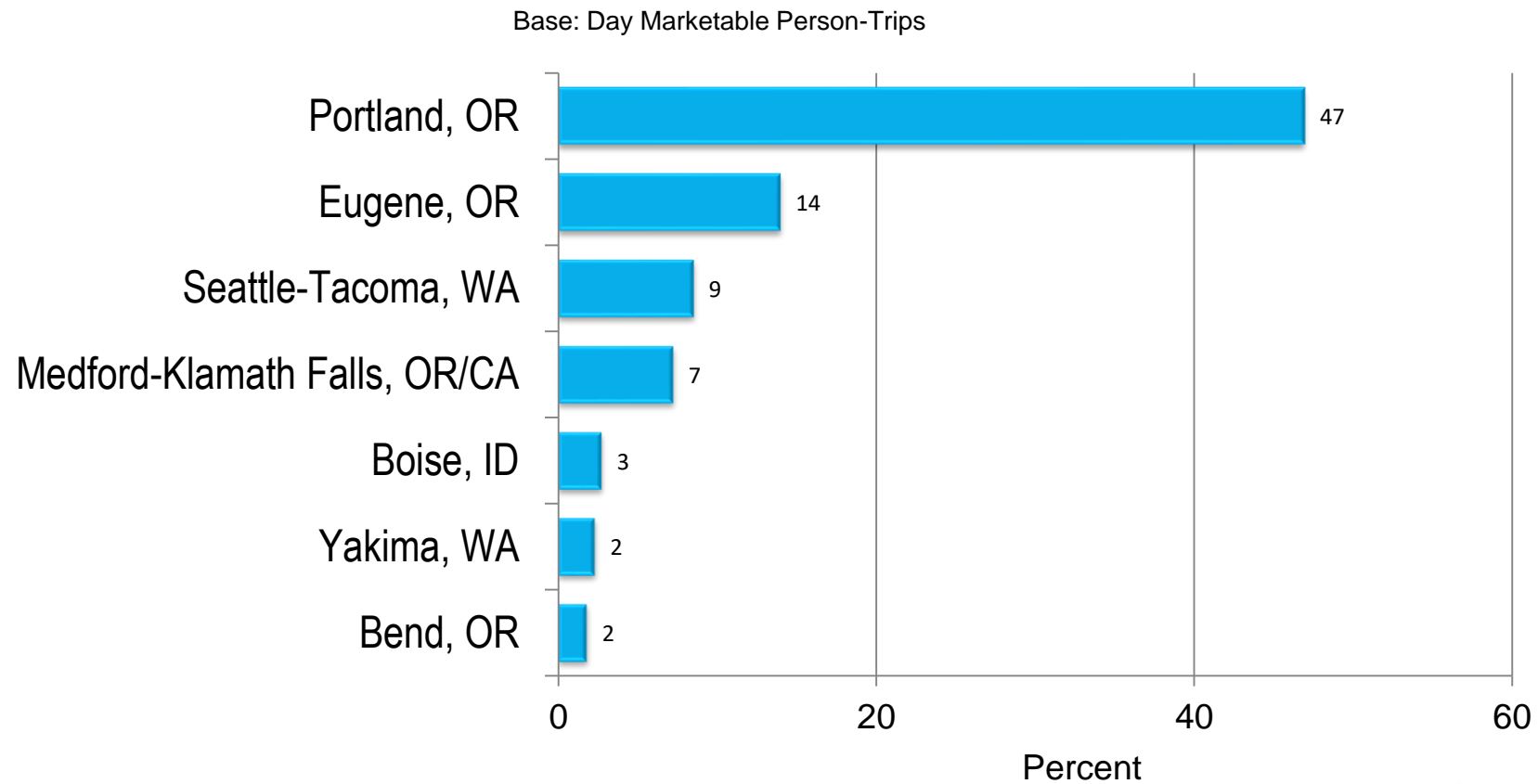
Base: Day Marketable Person-Trips



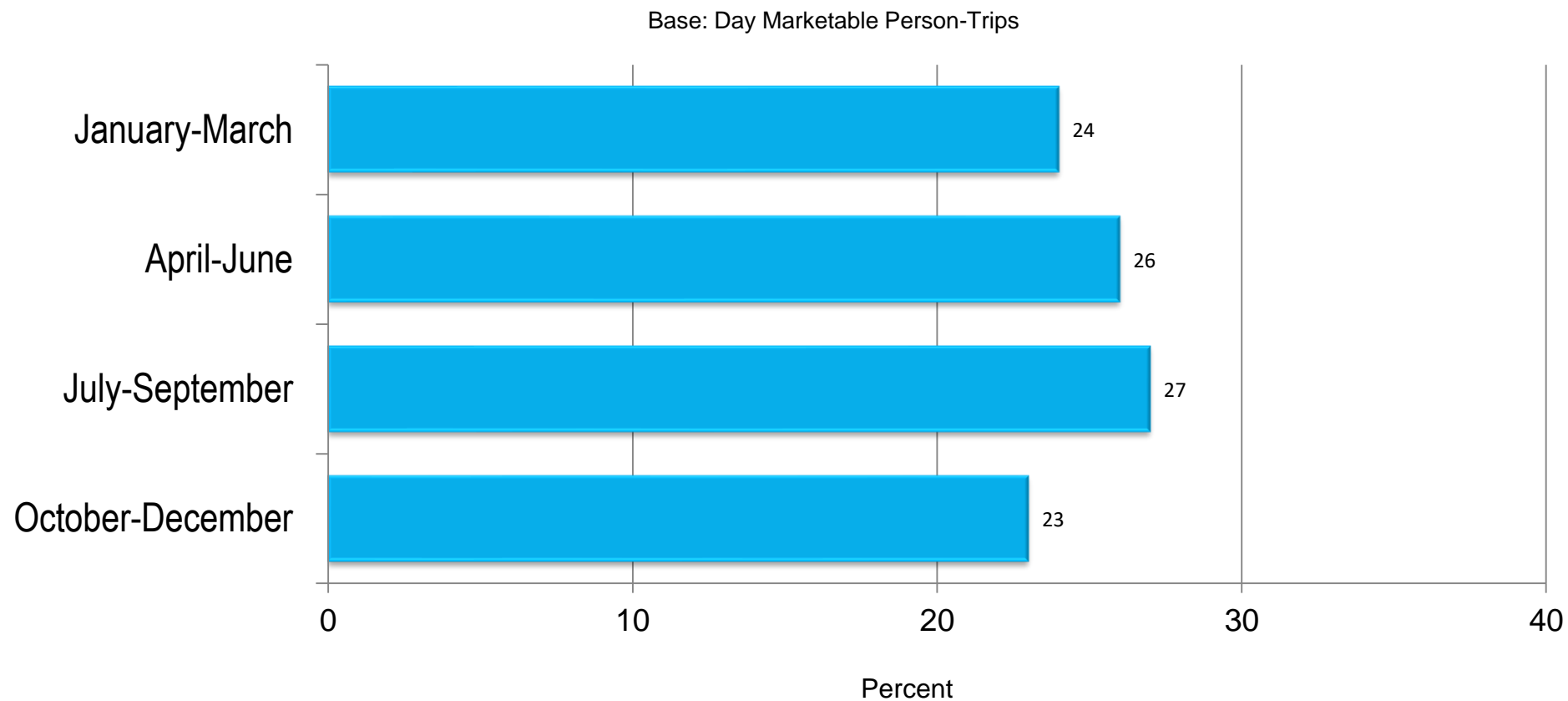
State Origin Of Trip



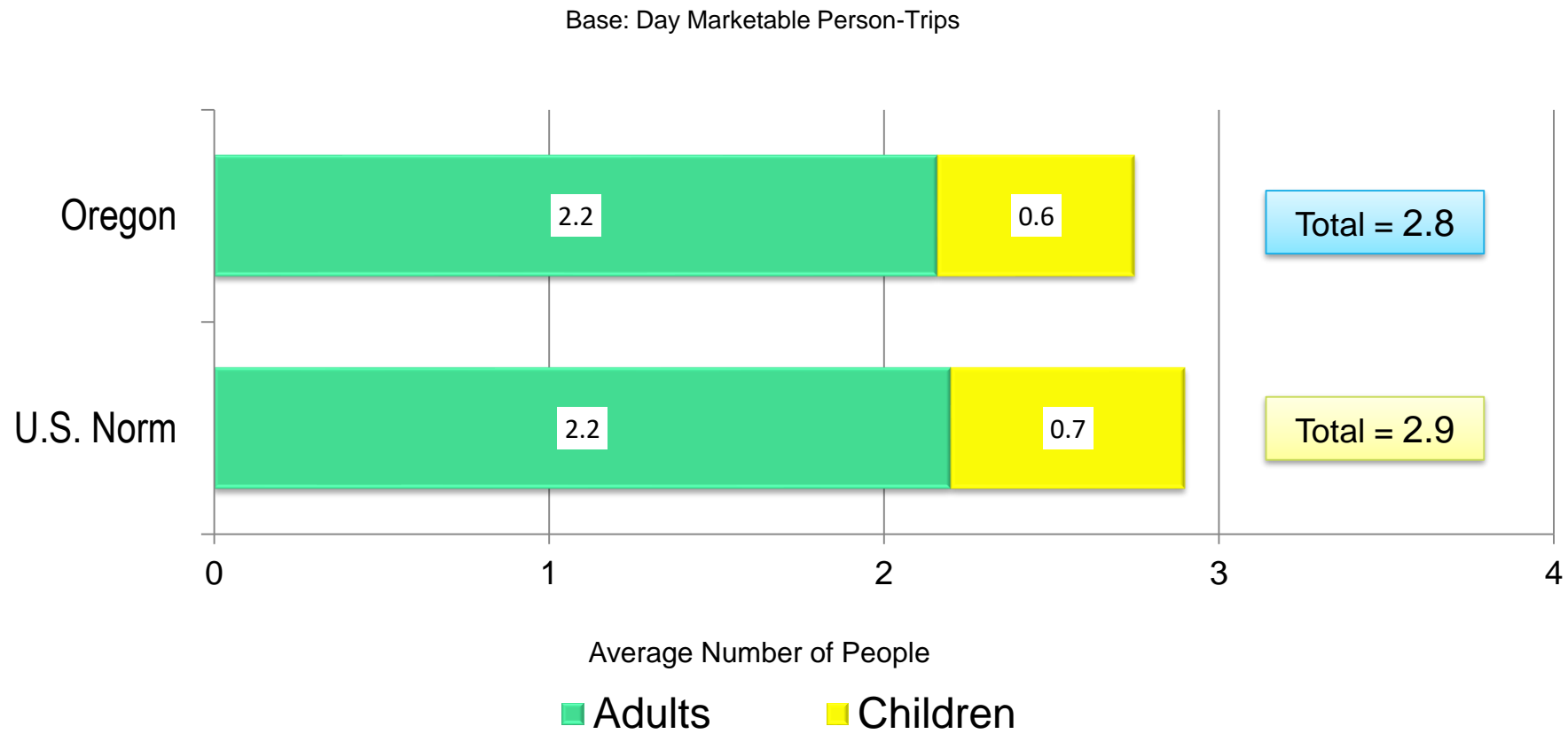
DMA Origin Of Trip



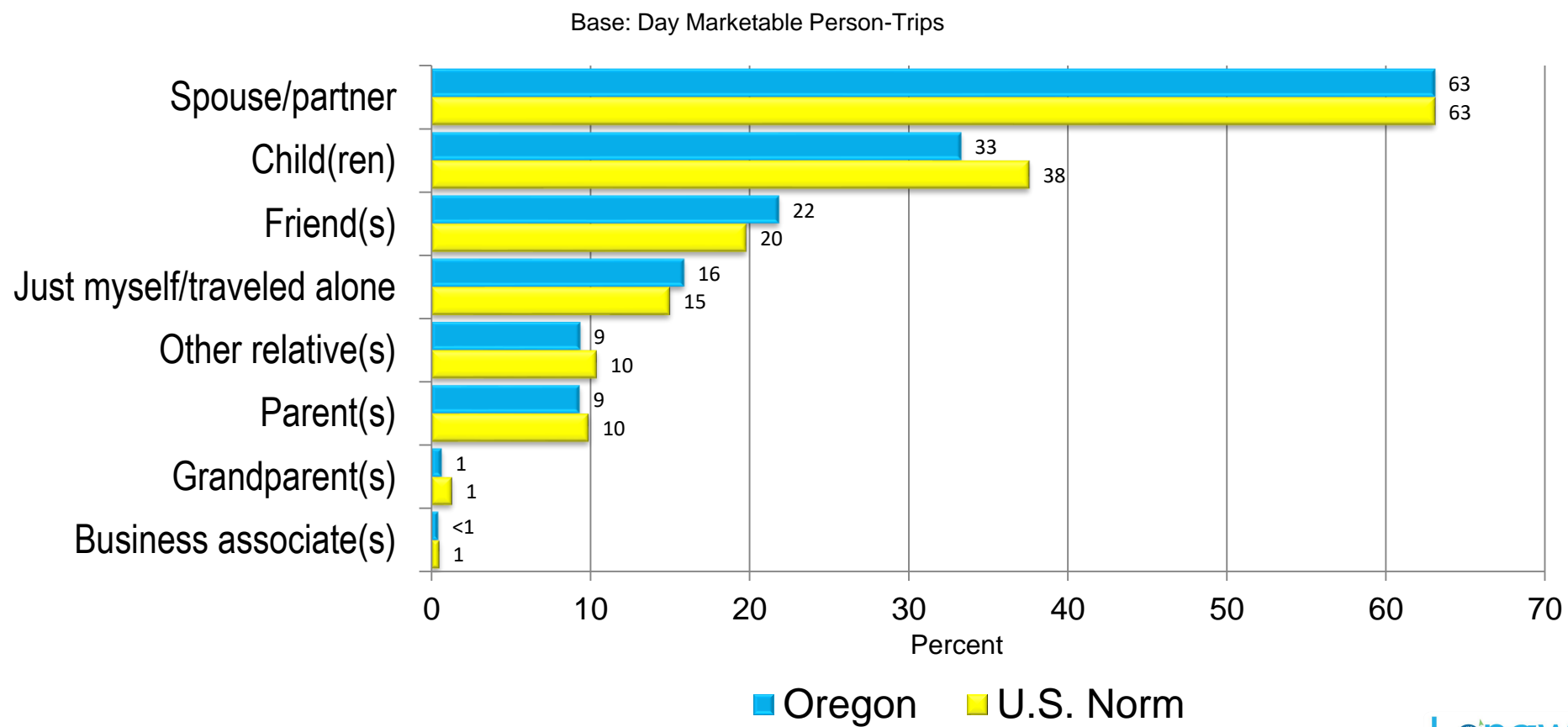
Season of Trip



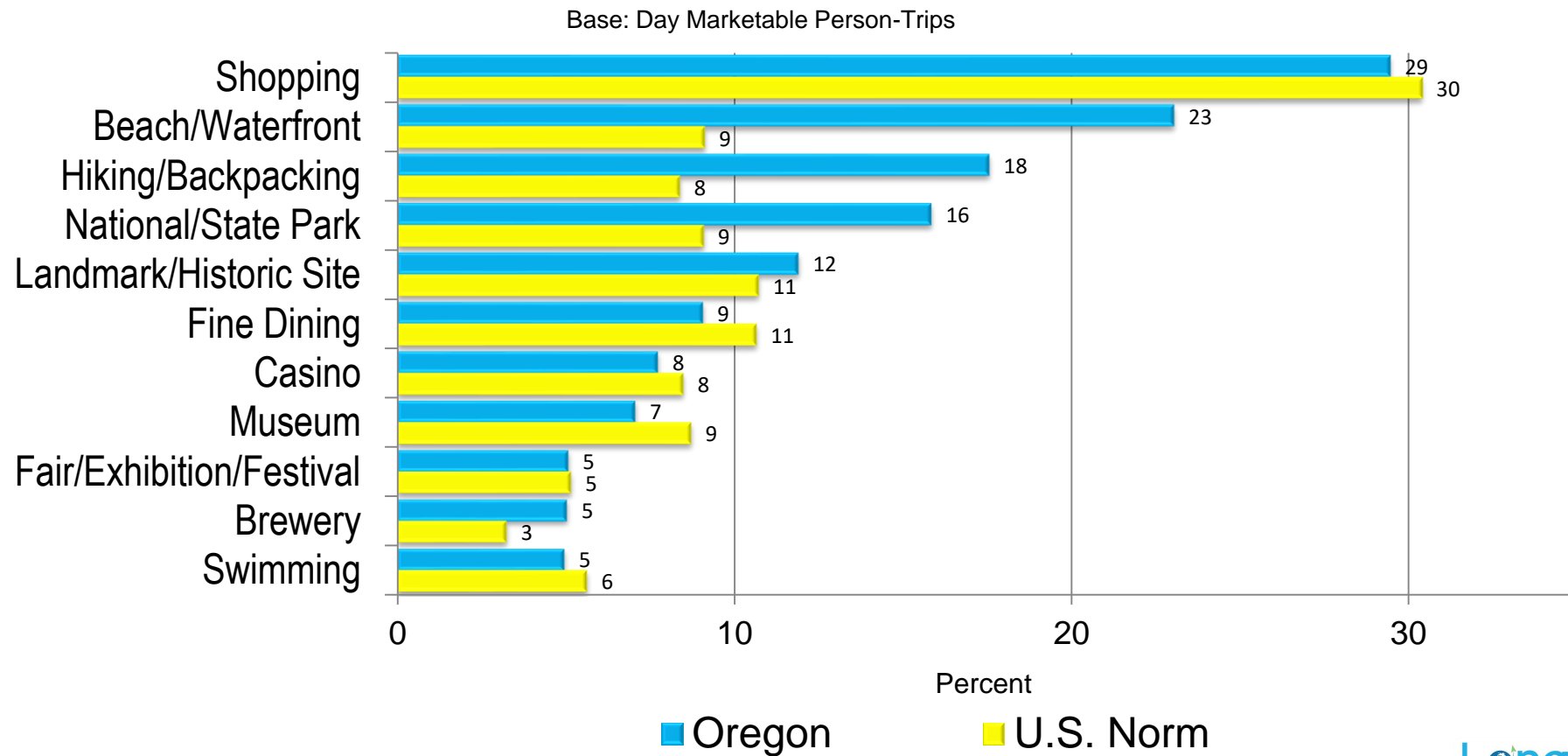
Size of Travel Party



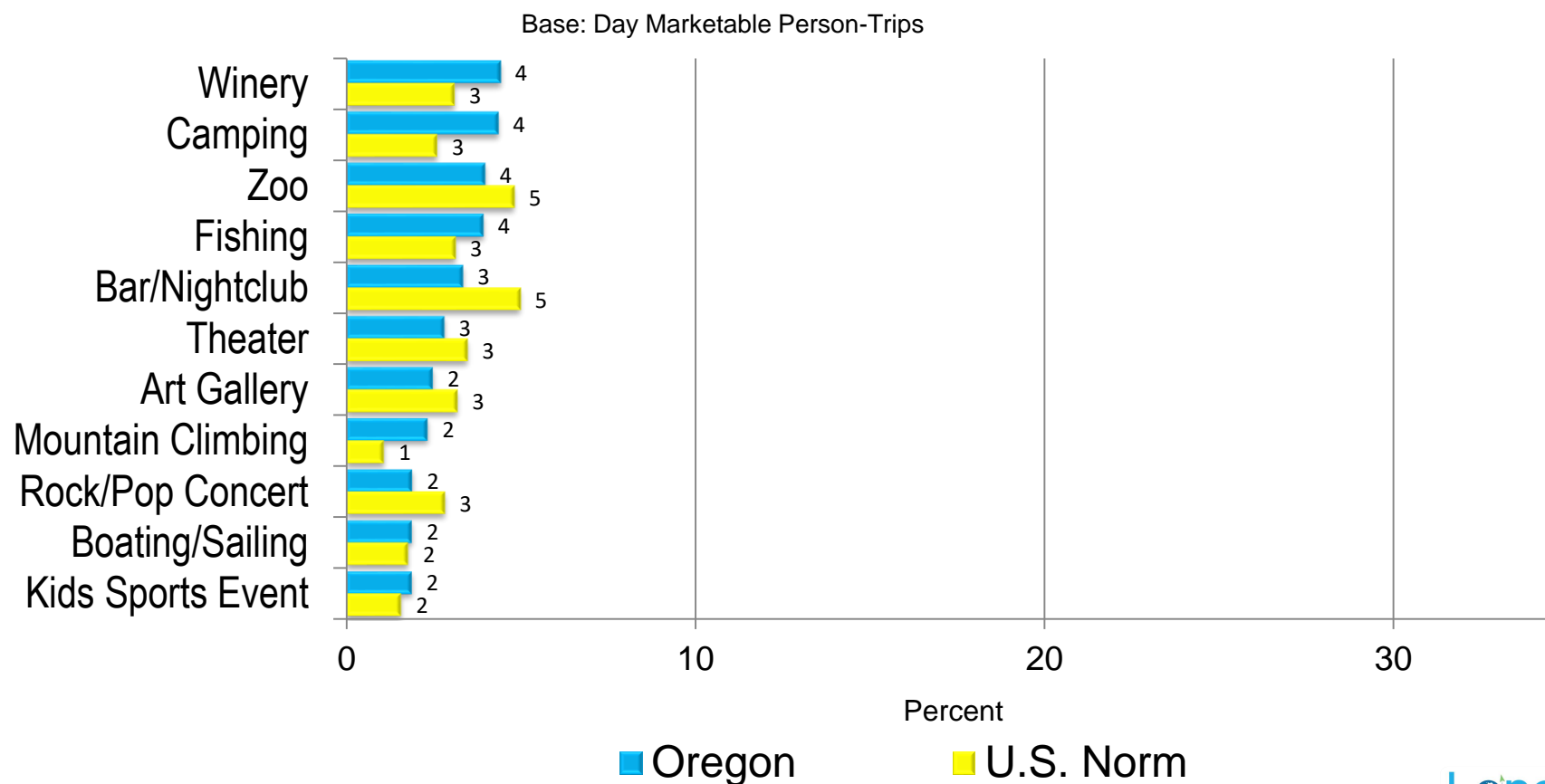
Composition of Immediate Travel Party



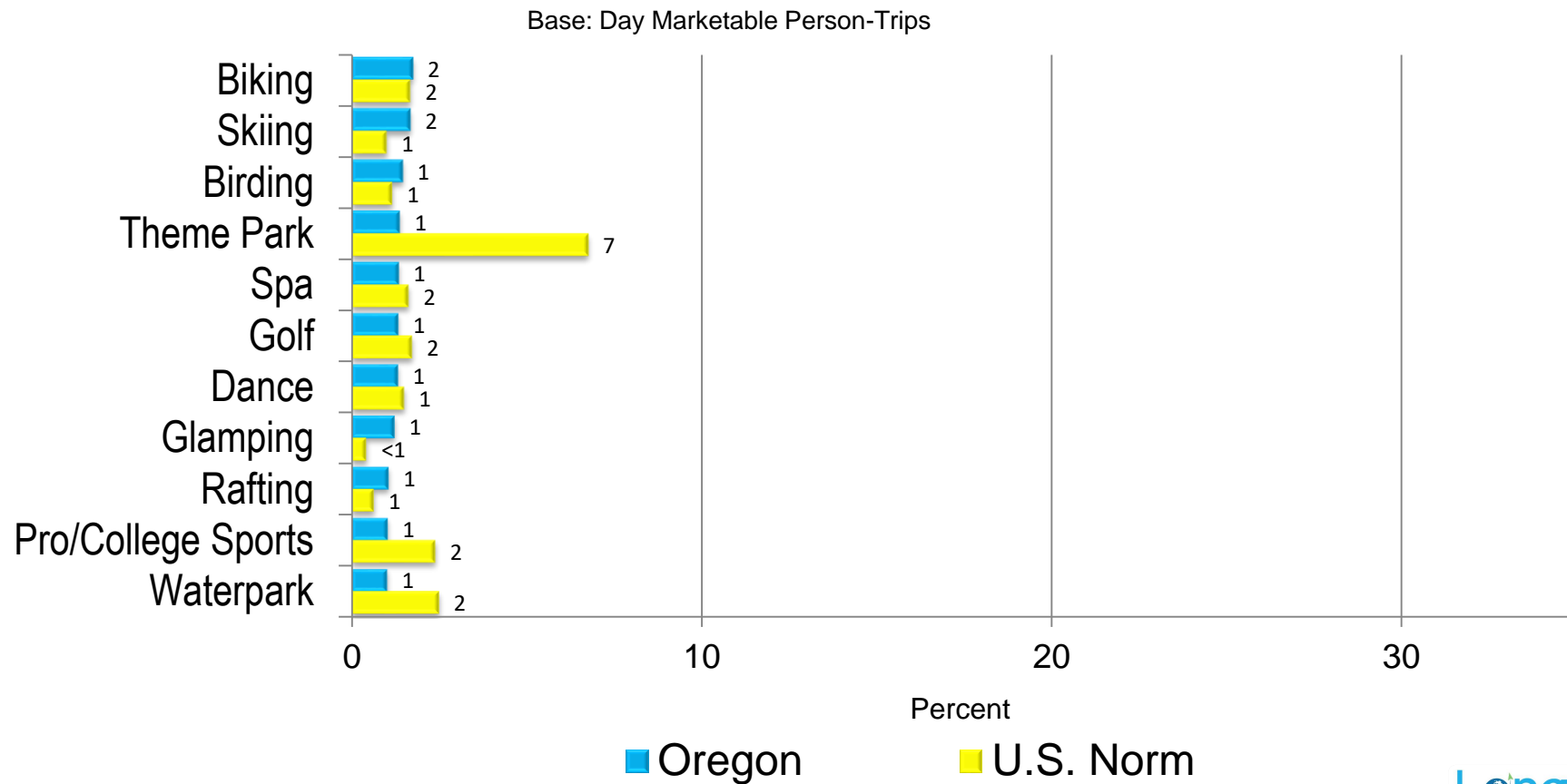
Activities and Experiences



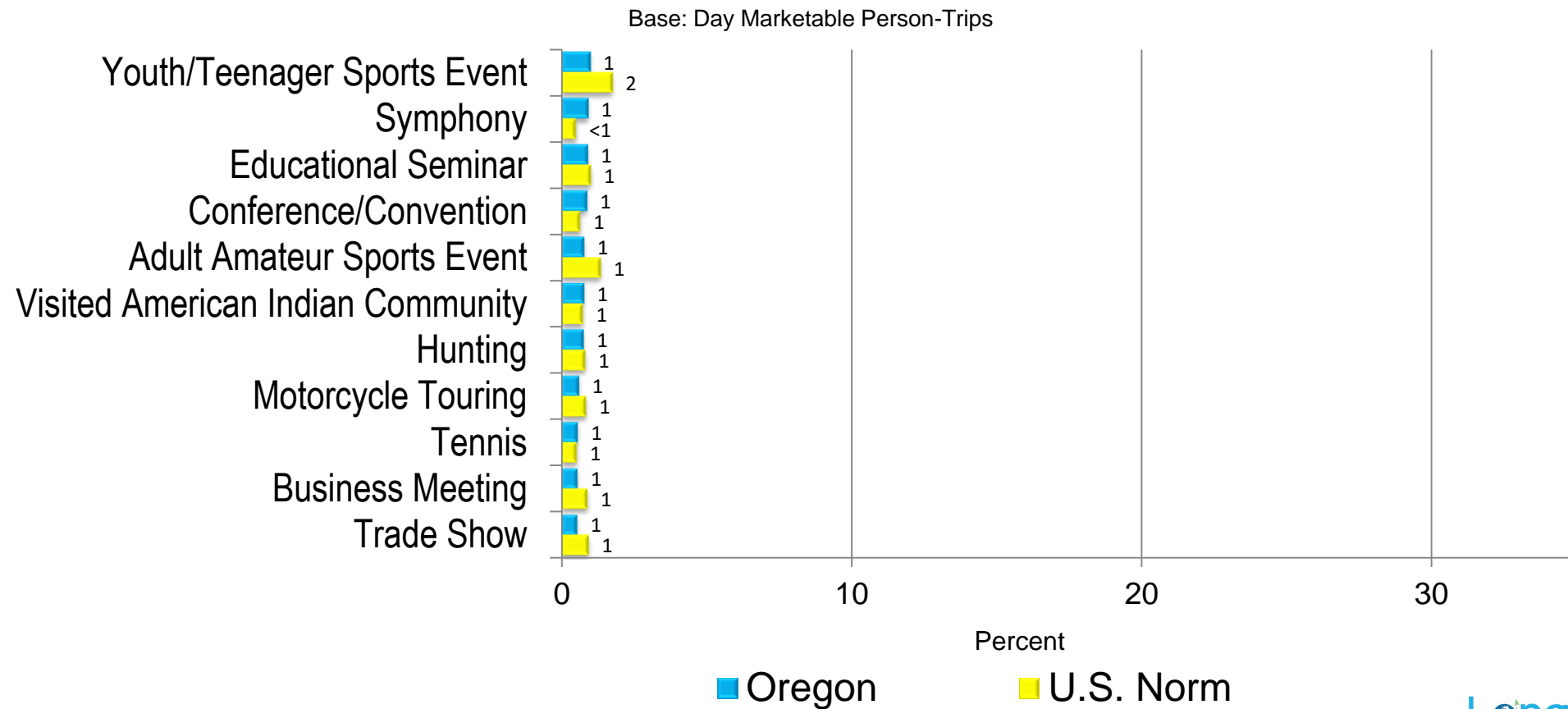
Activities and Experiences (Cont'd)



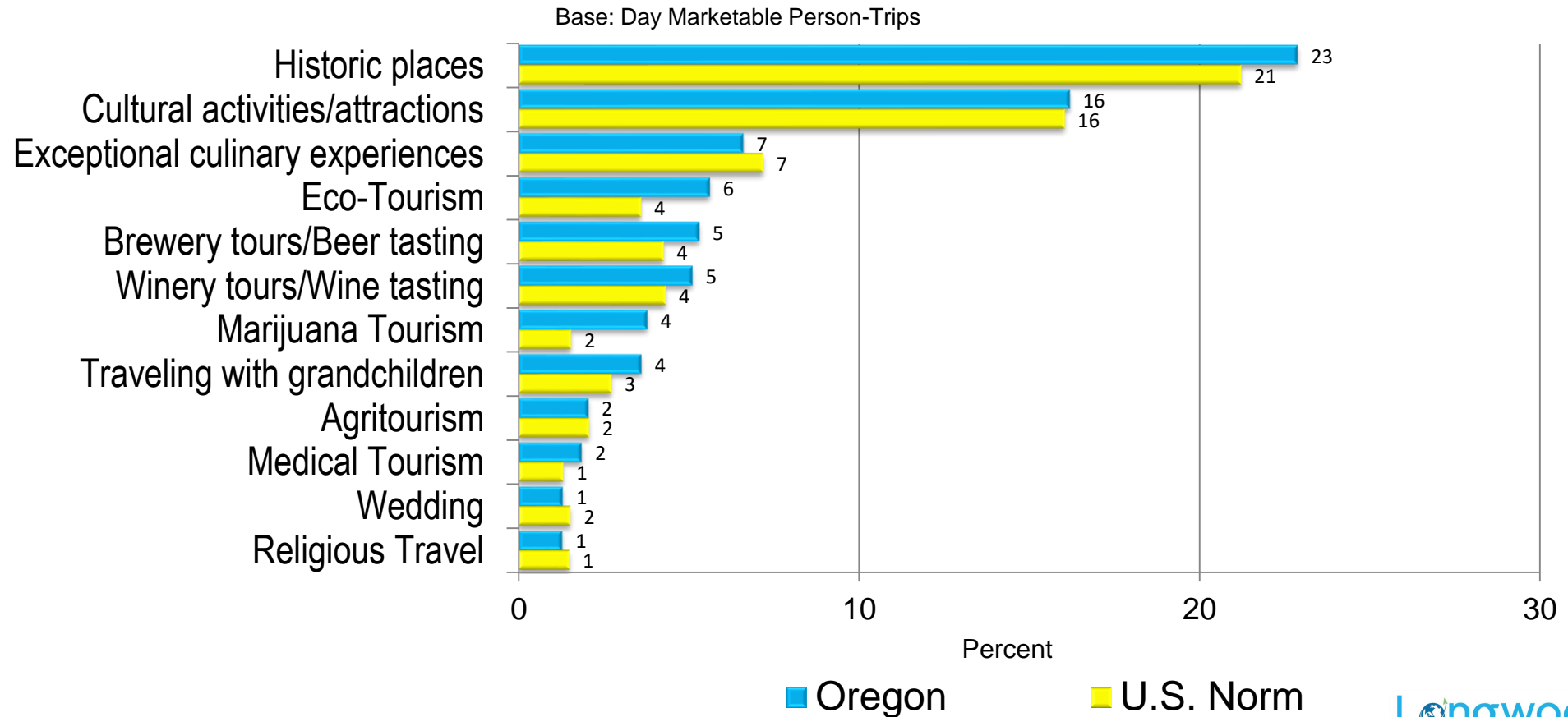
Activities and Experiences (Cont'd)



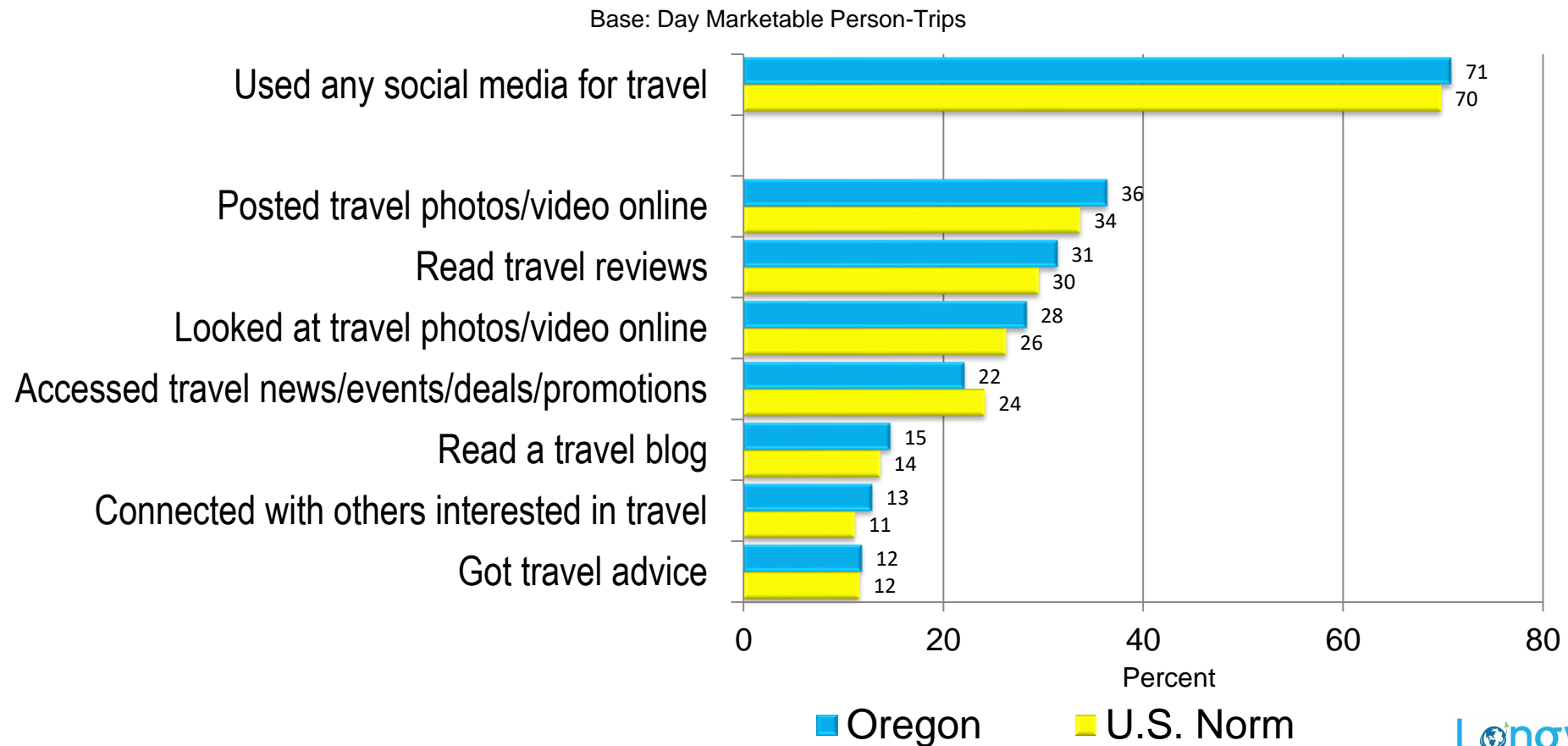
Activities and Experiences (Cont'd)



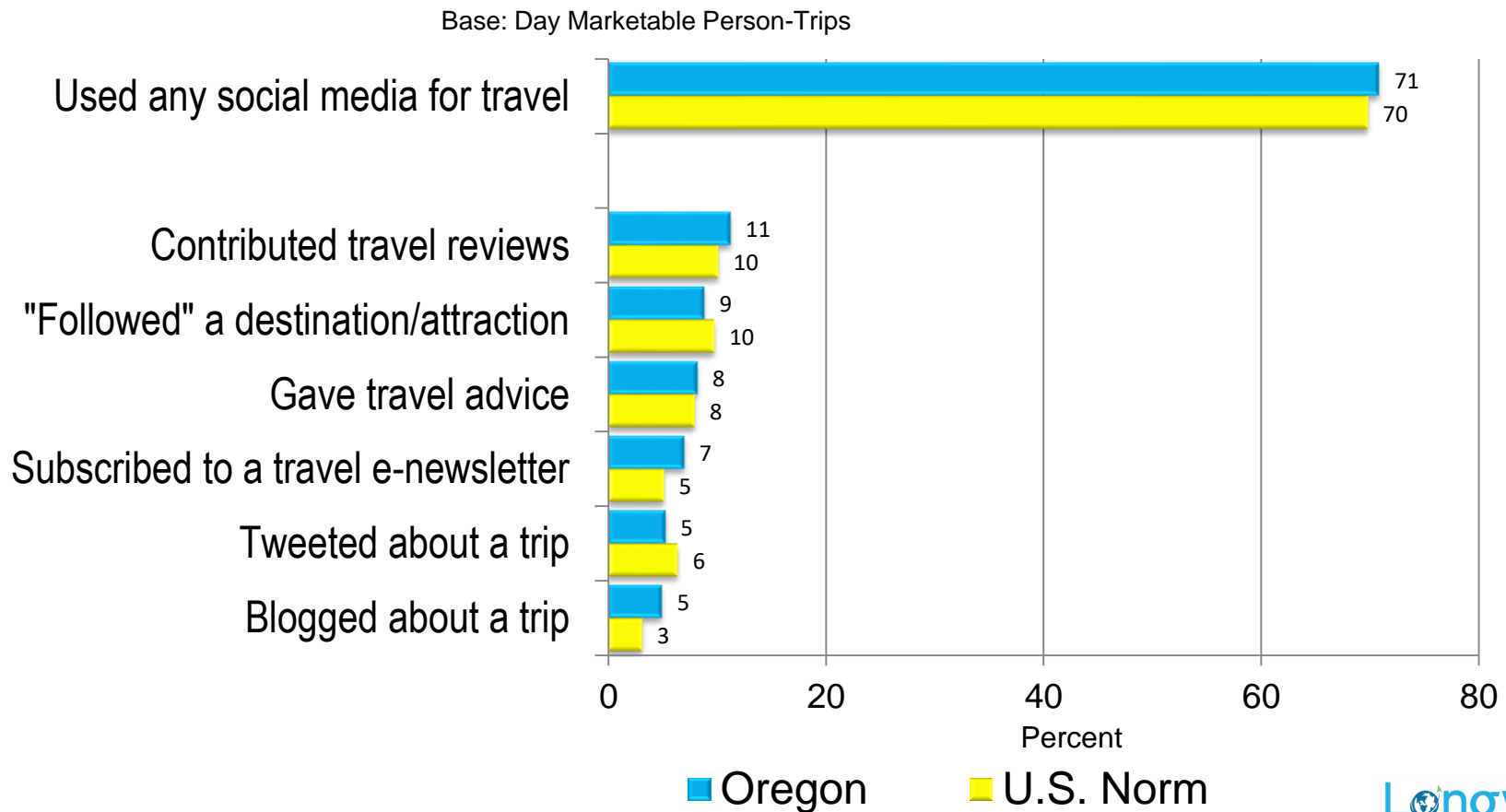
Activities of Special Interest



Online Social Media Use by Travelers

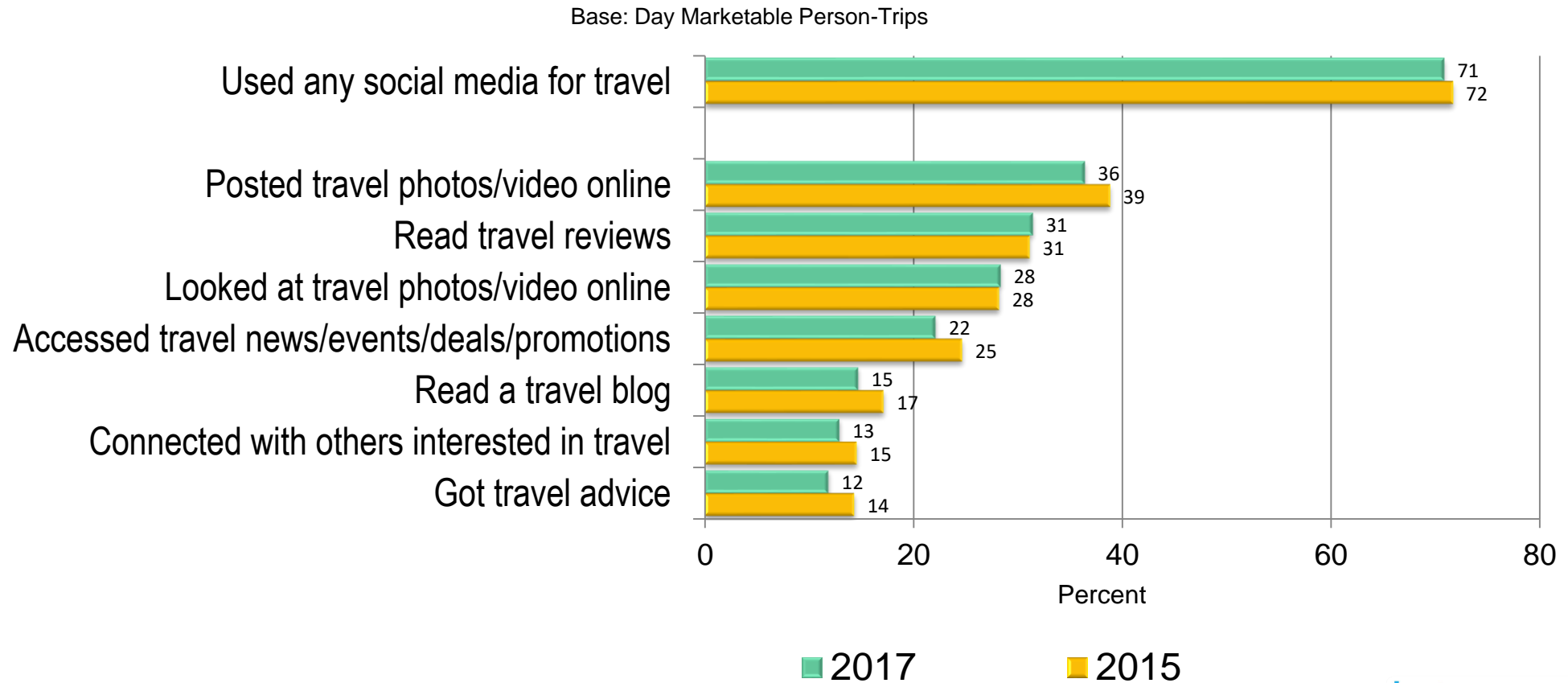


Online Social Media Use by Travelers (Cont'd)

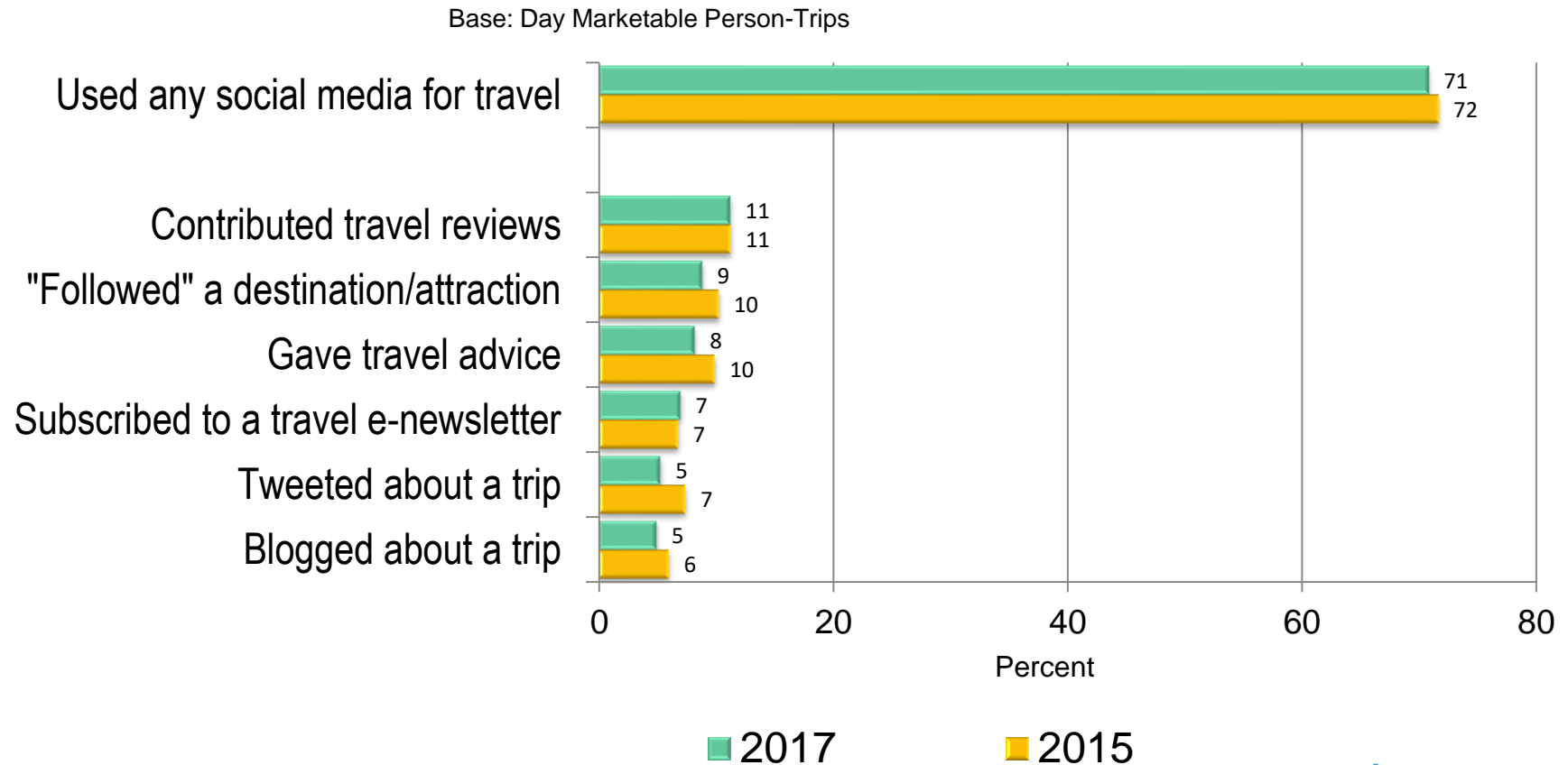


Online Social Media Use by Travelers

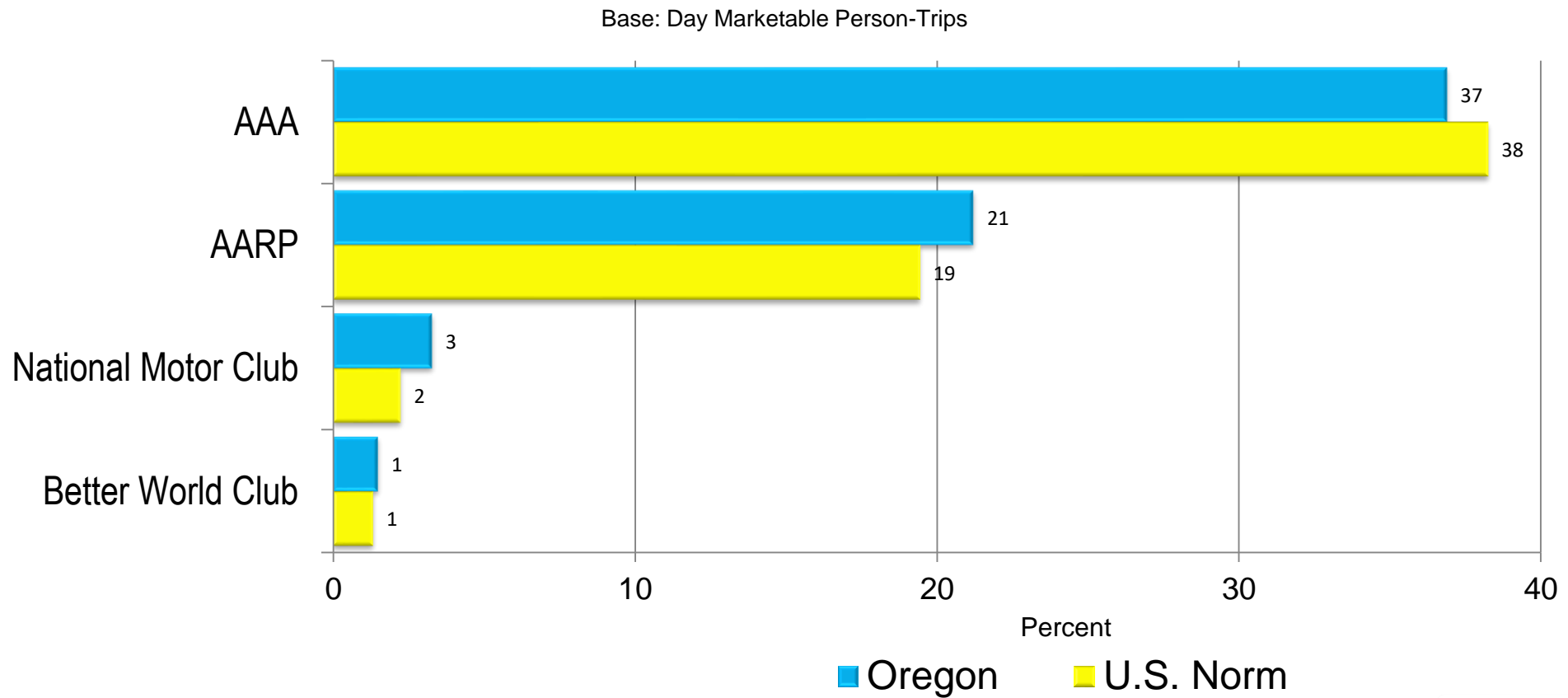
– 2017 vs. 2015



Online Social Media Use by Travelers – 2017 vs. 2015 (Cont'd)



Organization Membership

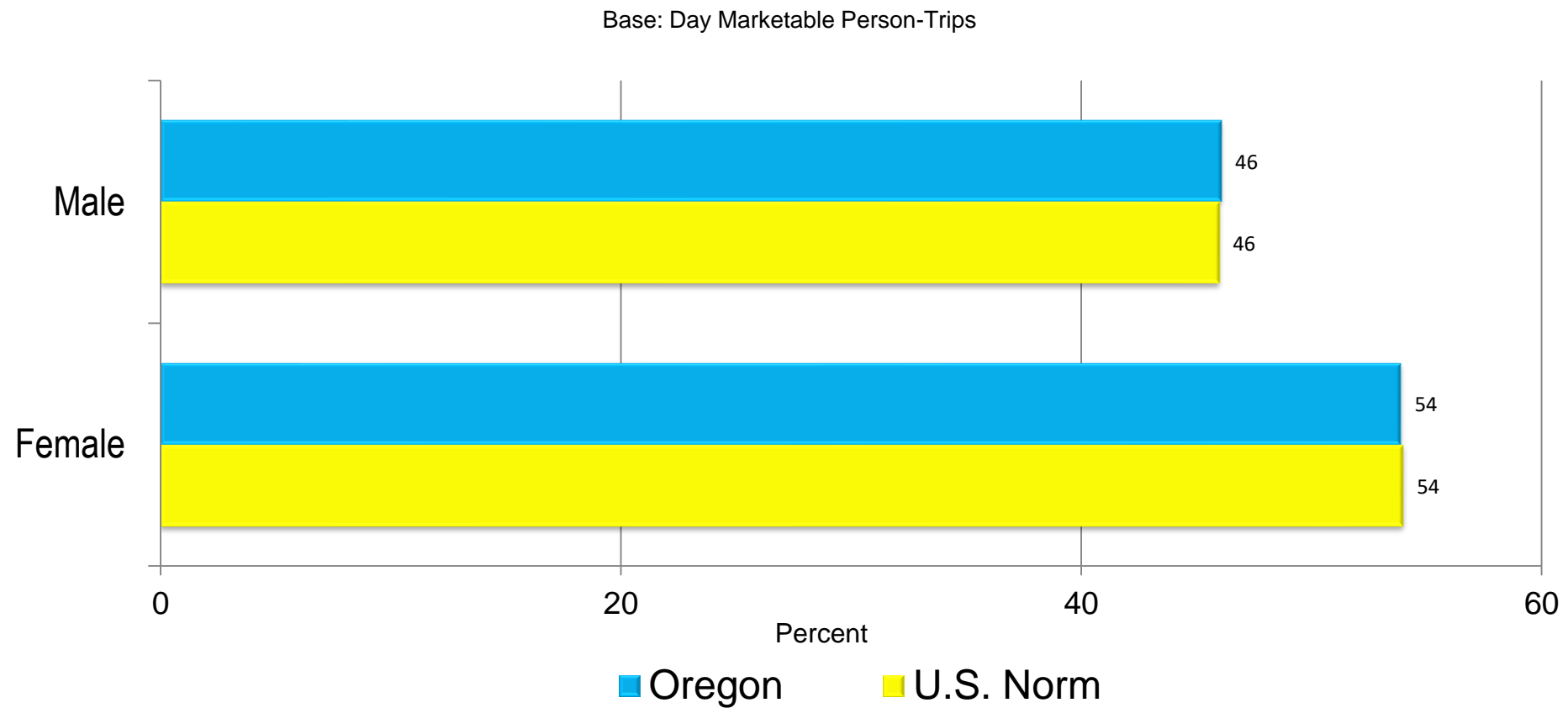




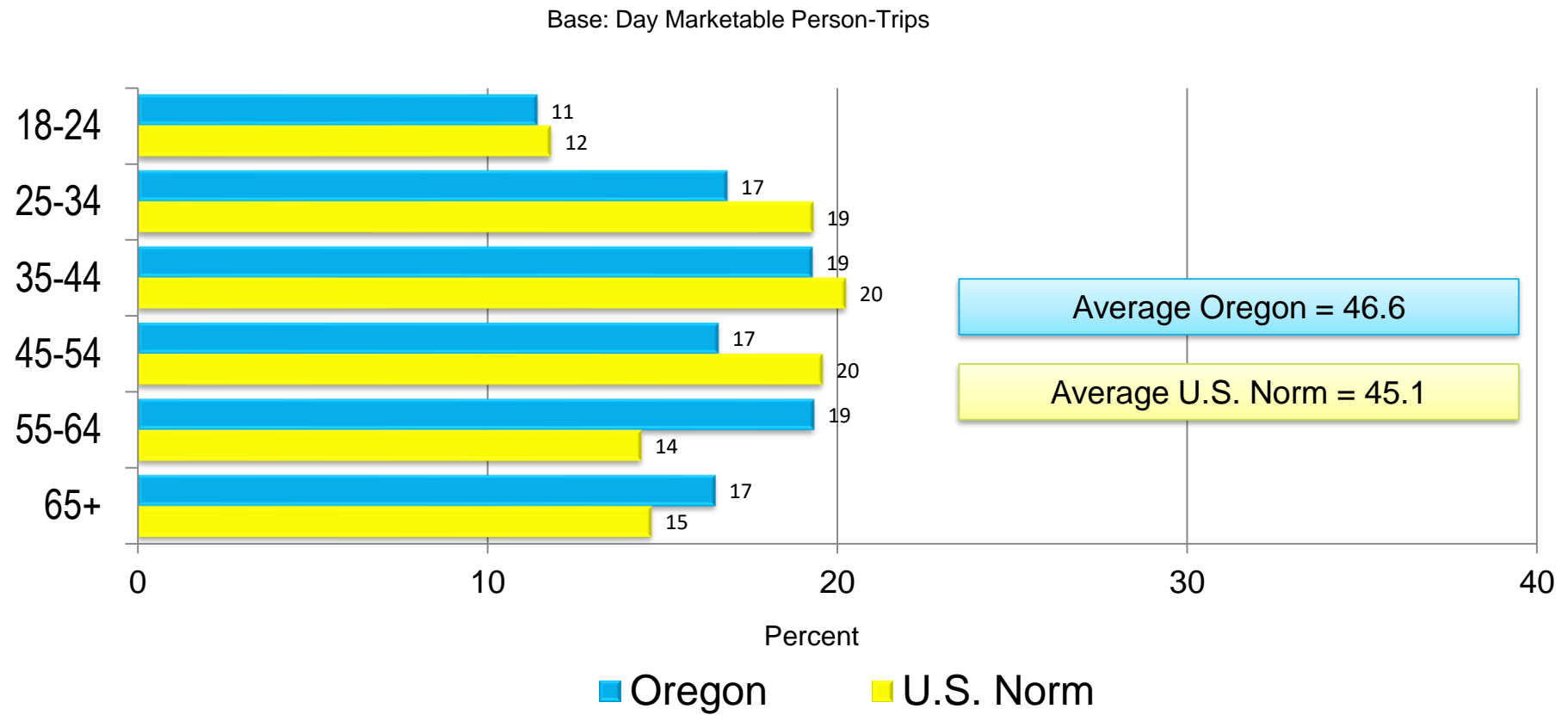
Traveler Demographic Profile of Day Marketable Trips



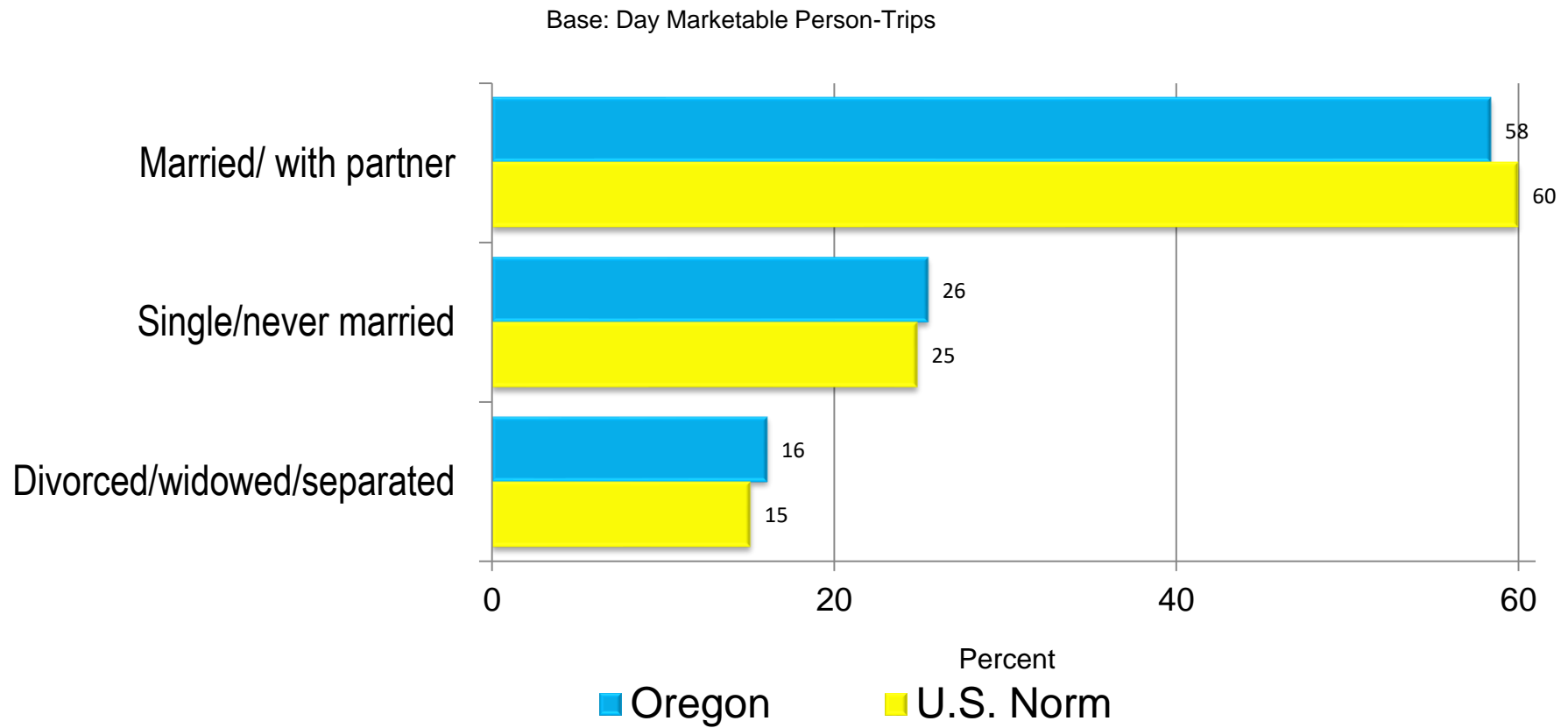
Gender



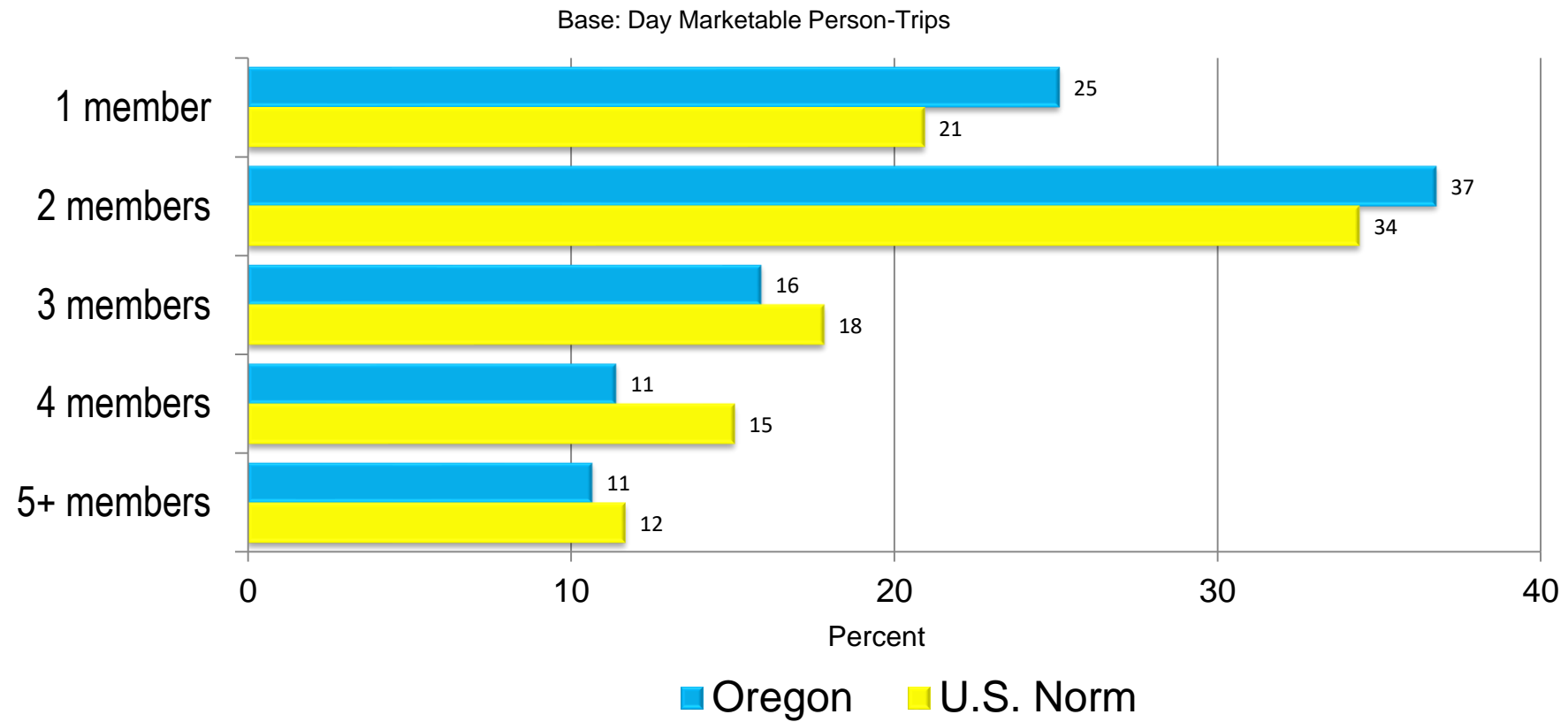
Age



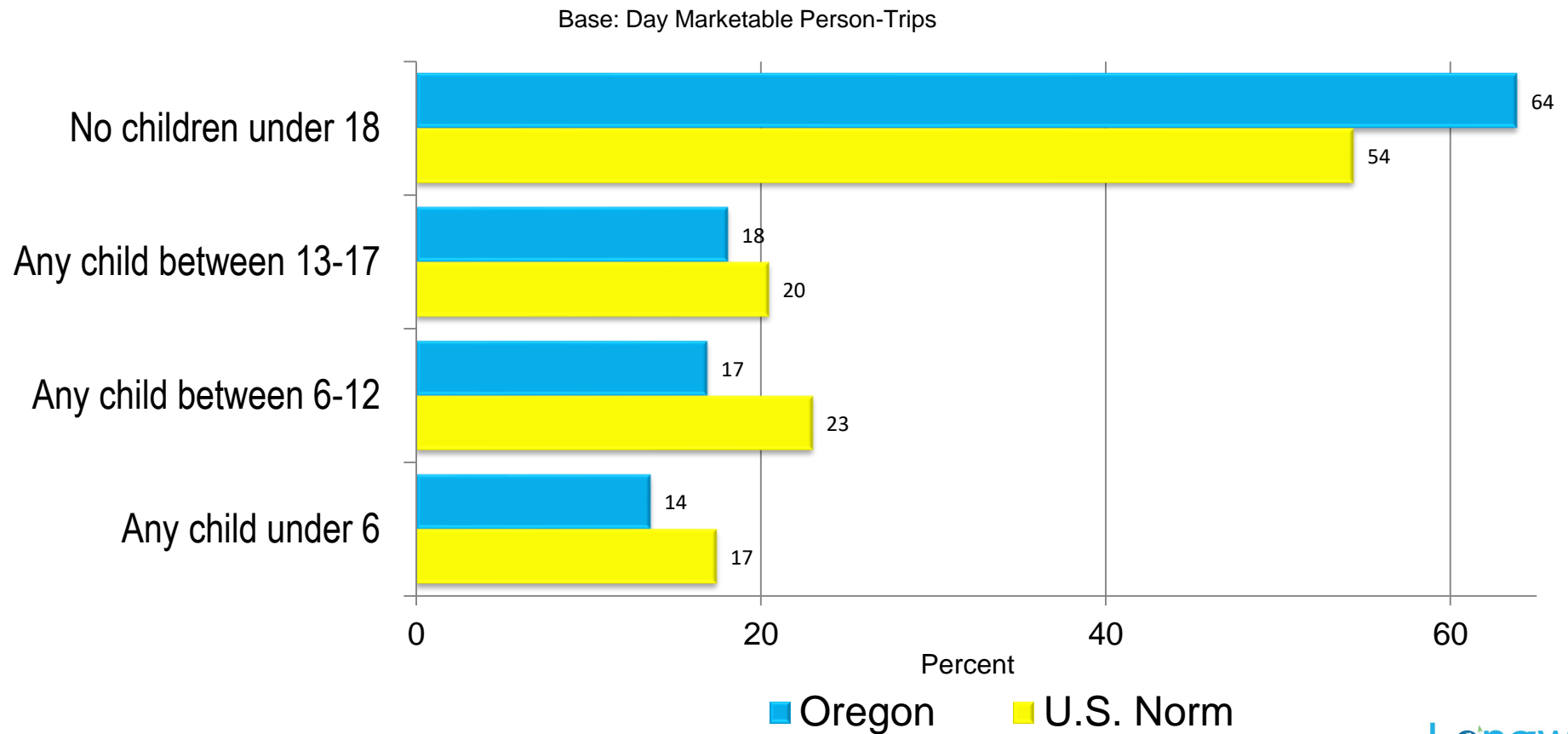
Marital Status



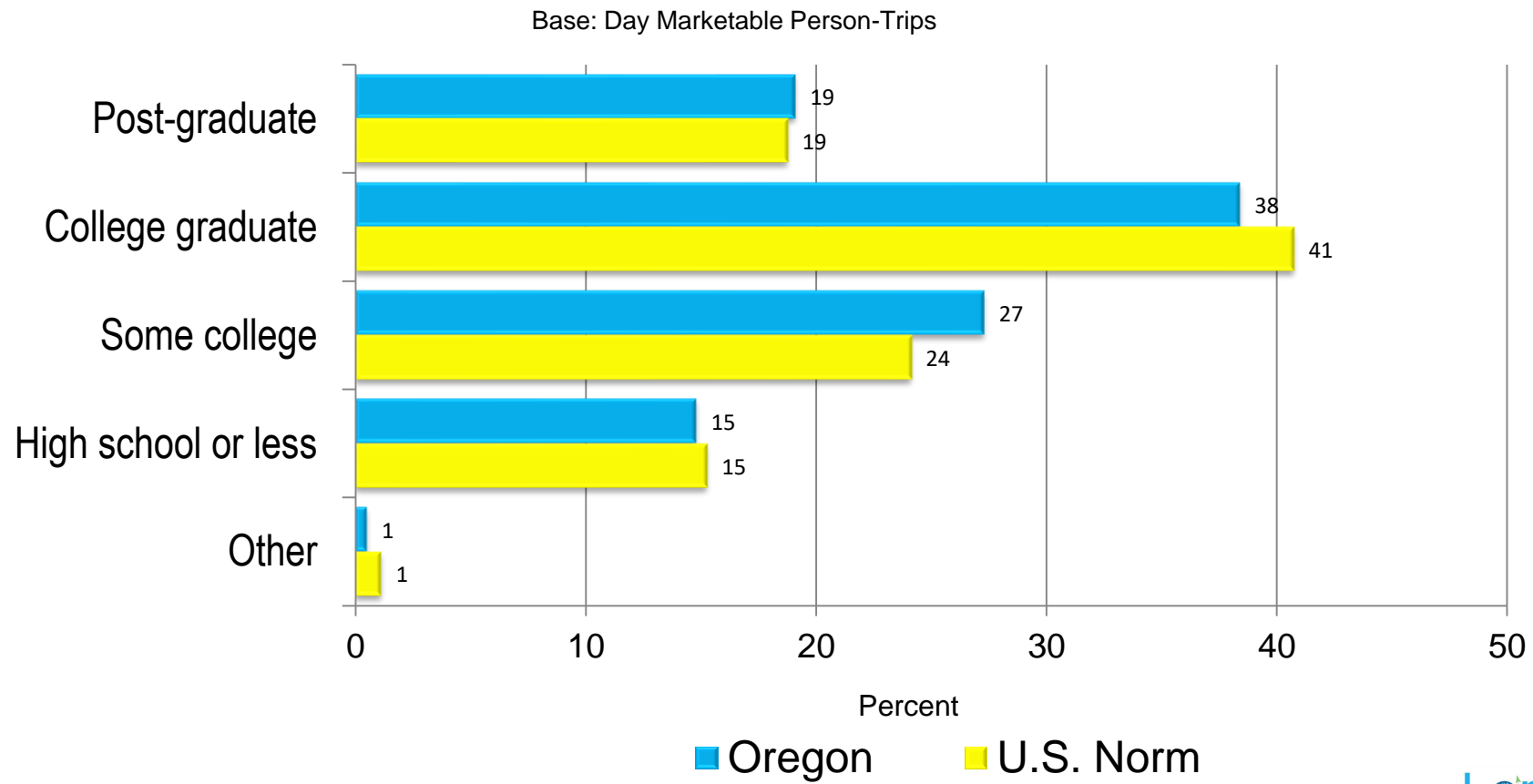
Household Size



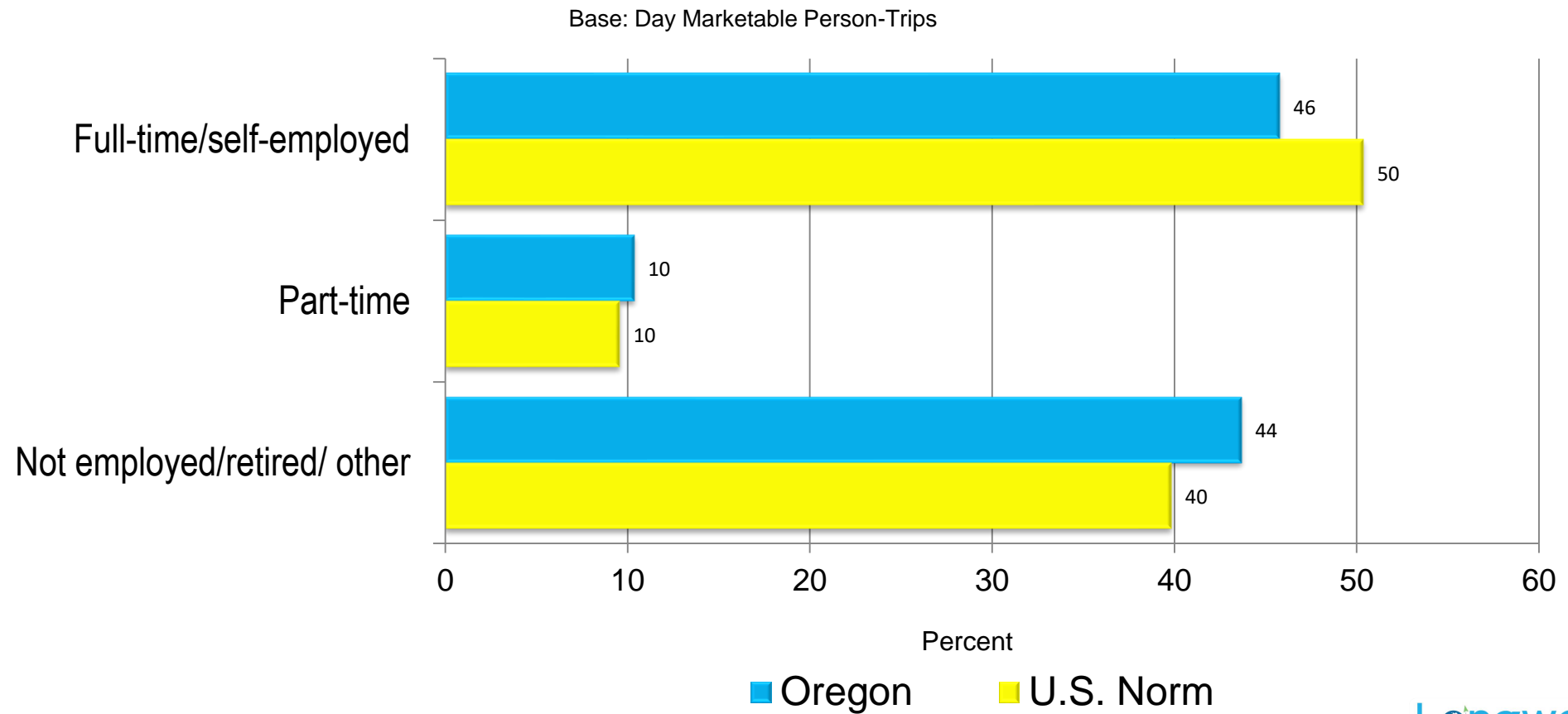
Children in Household



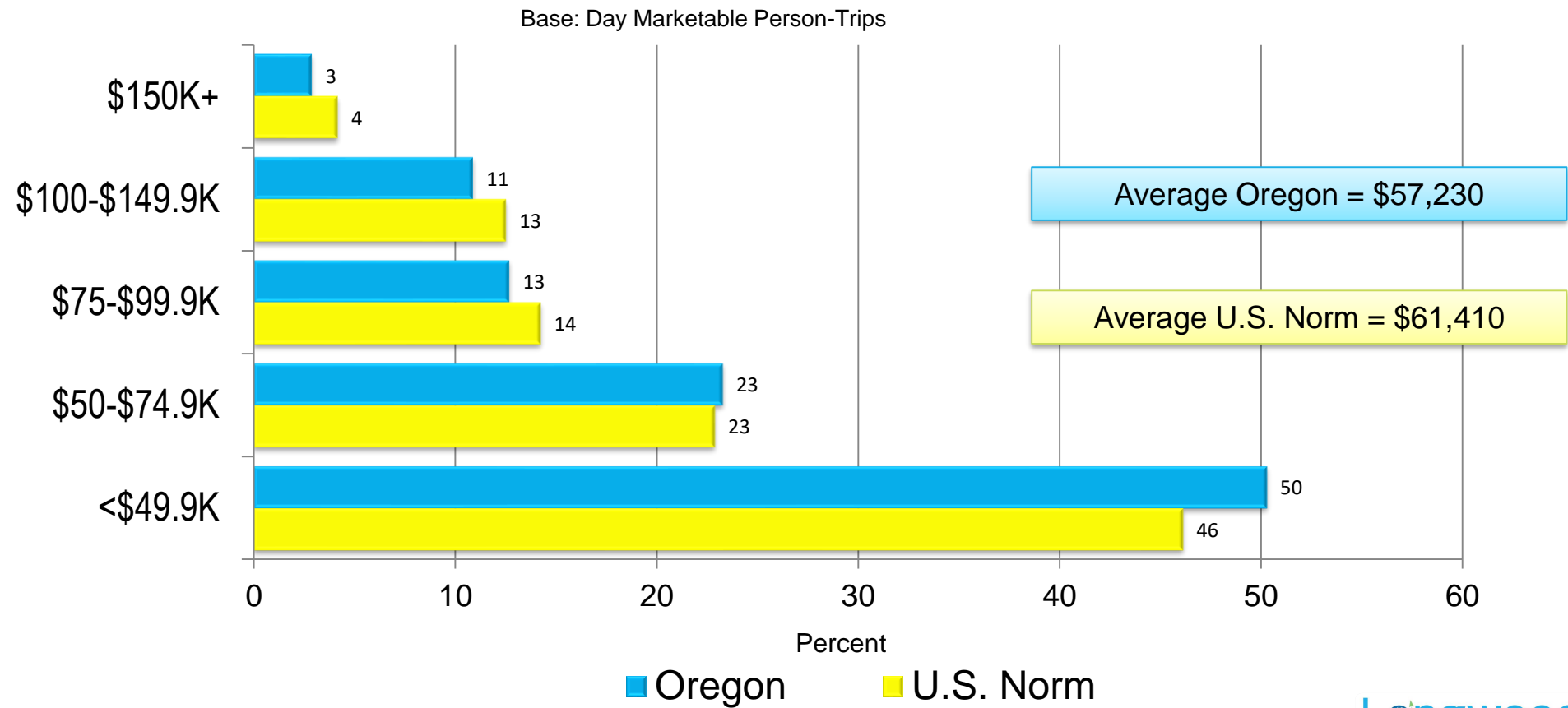
Education



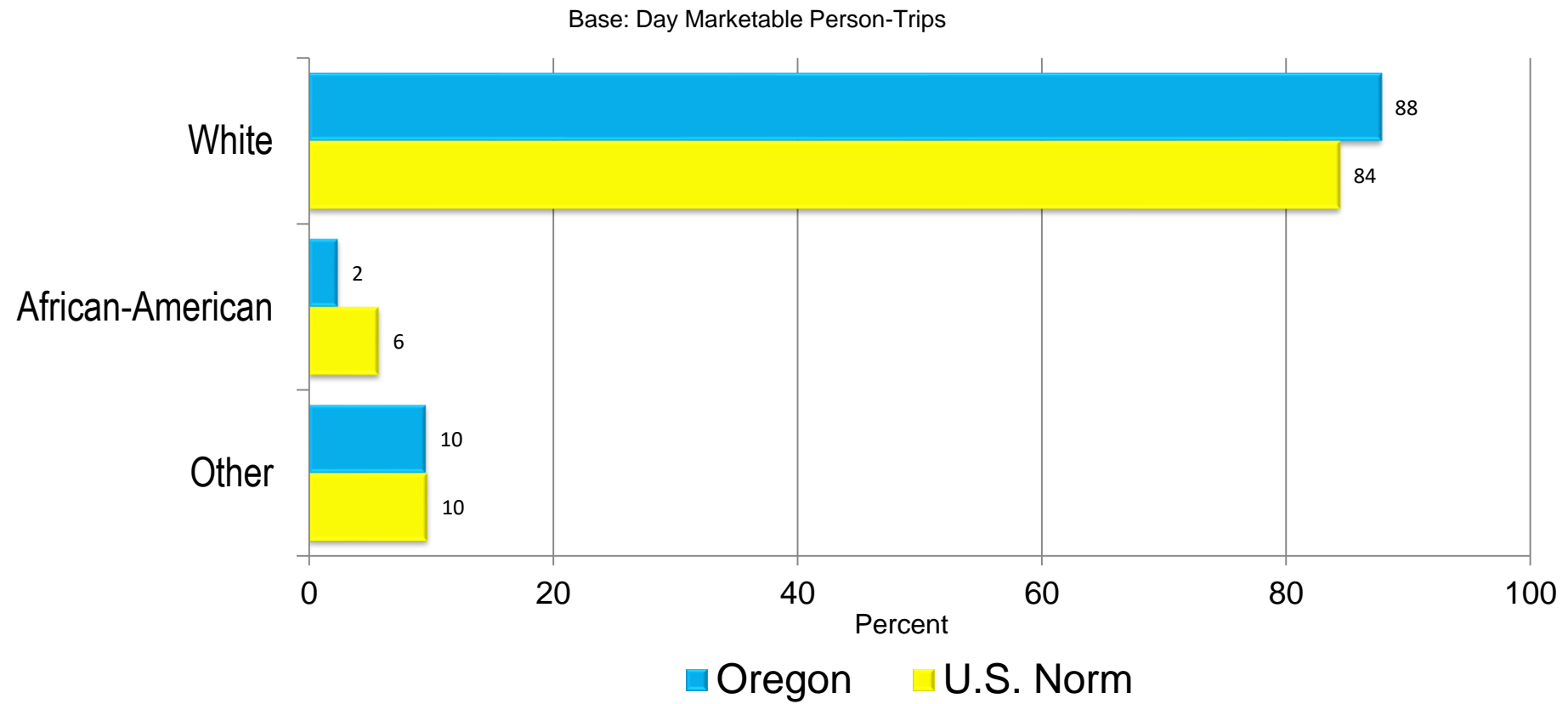
Employment



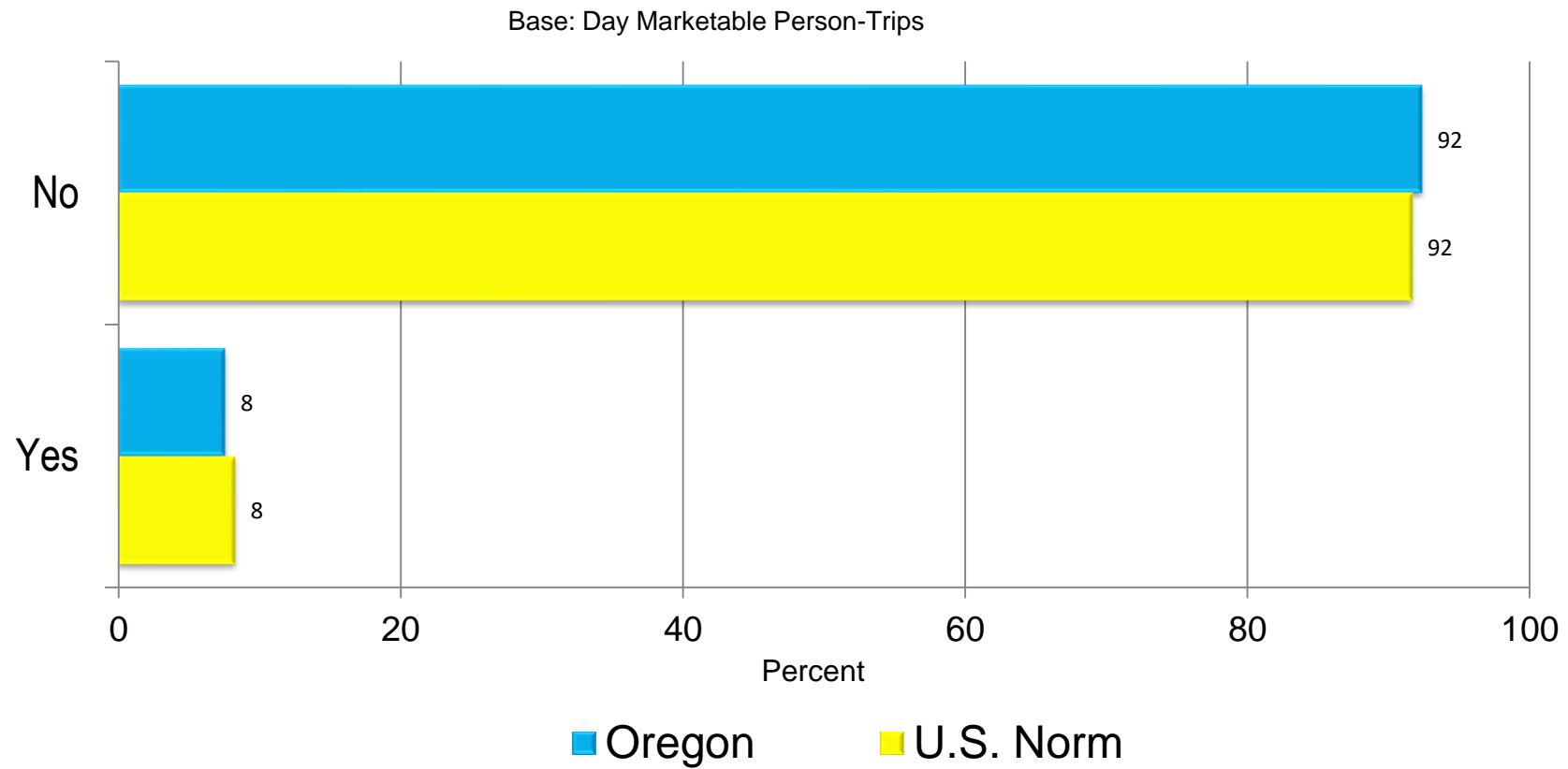
Household Income



Race



Hispanic Background





Appendix: 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

Marketable Trips:

Include all leisure trips, with the exception of visits to friends/relatives

- **Leisure Trips:** Include 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
- **Business Trips:**
 - 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.