



**TRAVEL
OREGON**

Oregon 2017 Regional Visitor Report Southern Region



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:
 - ✓ Estimates of 2017 overnight visitor volume and travel expenditures for Oregon as well as for the Southern Region in particular
 - ✓ Strategic intelligence about the Southern Region's overnight travel market including:
 - ✓ Key sources of business
 - ✓ Visitor profiling
 - ✓ Trip characteristics

Methodology

- For each of the 2016 and 2017 travel years, a representative sample of visitors to the Southern Region was identified through the **Travel USA®** survey:
- Respondents who visited Oregon were asked to identify which of the state's seven tourism regions they spent time in with the aid of a visual map.
- Of the survey sample of 7,919 overnight trips taken to Oregon in 2016 and 2017:
 - 781 included a visit to the Southern Region
 - Of those, 415 were **marketable trips**

Map



Analytical Note

- The results of this report are based on two time frames:
 - Market size and structure estimates for the Southern Region are reported for the 2017 travel year, as are all Oregon state norms.
 - To maximize statistical reliability, other Southern Region data (trip characteristics and visitor profiles) are based on two years' combined sample from 2016 and 2017 unless otherwise indicated.



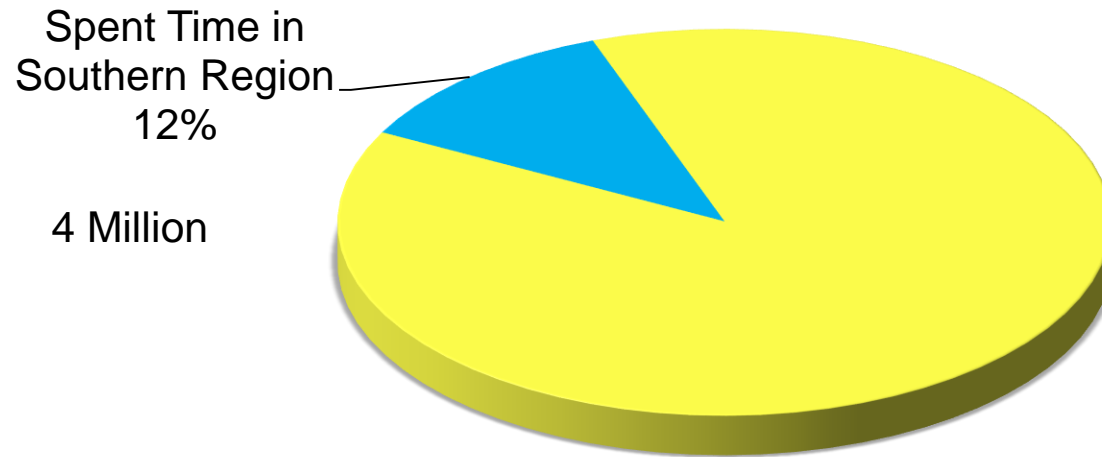
Longwoods
INTERNATIONAL
40 YEARS TOGETHER

Travel Market Size & Structure— Southern Region 2017



Size of the Southern Region's Overnight Travel Market

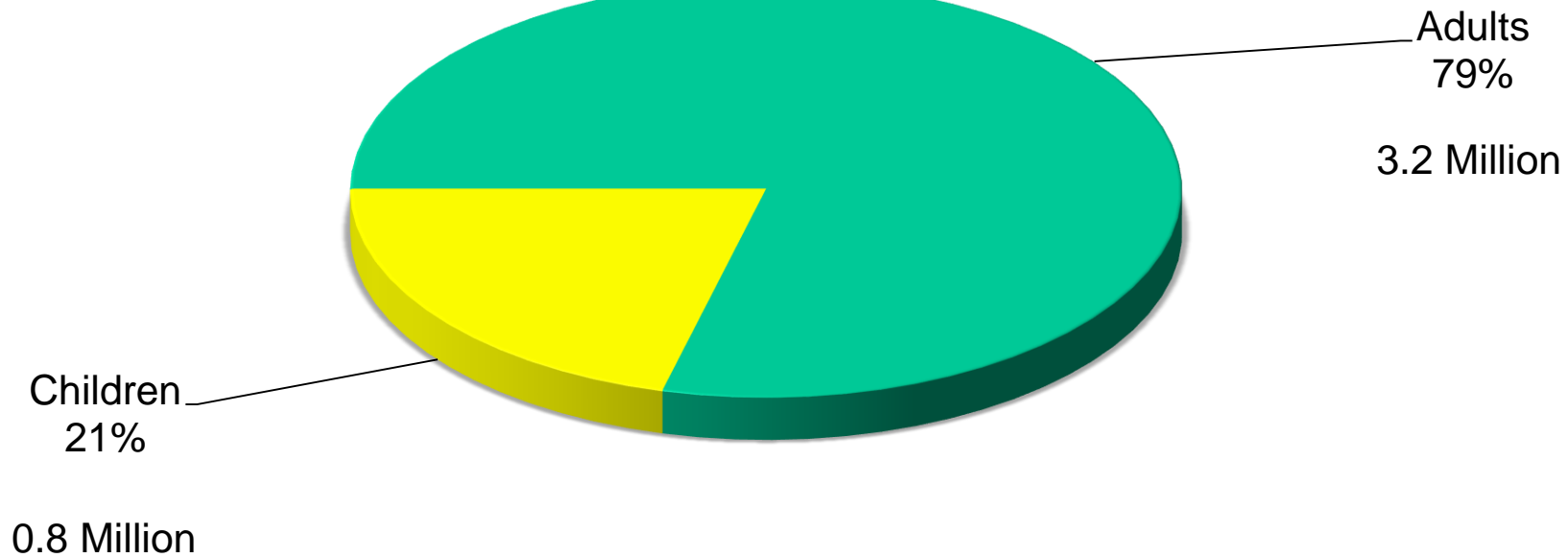
Total Overnight Trips to Oregon* = 34.1 Million



*Includes both adults and children

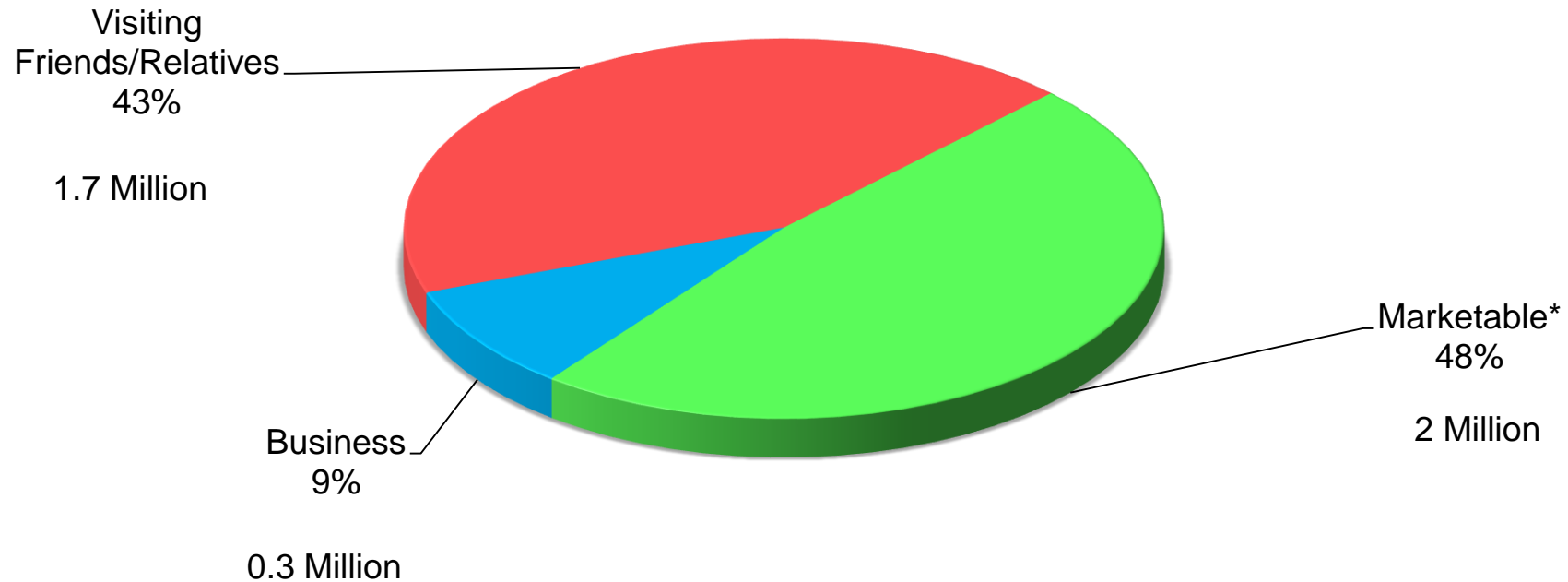
The Southern Region's Overnight Travel Market — Adults vs. Children

Total Overnight Trips to the Southern Region = 4 Million



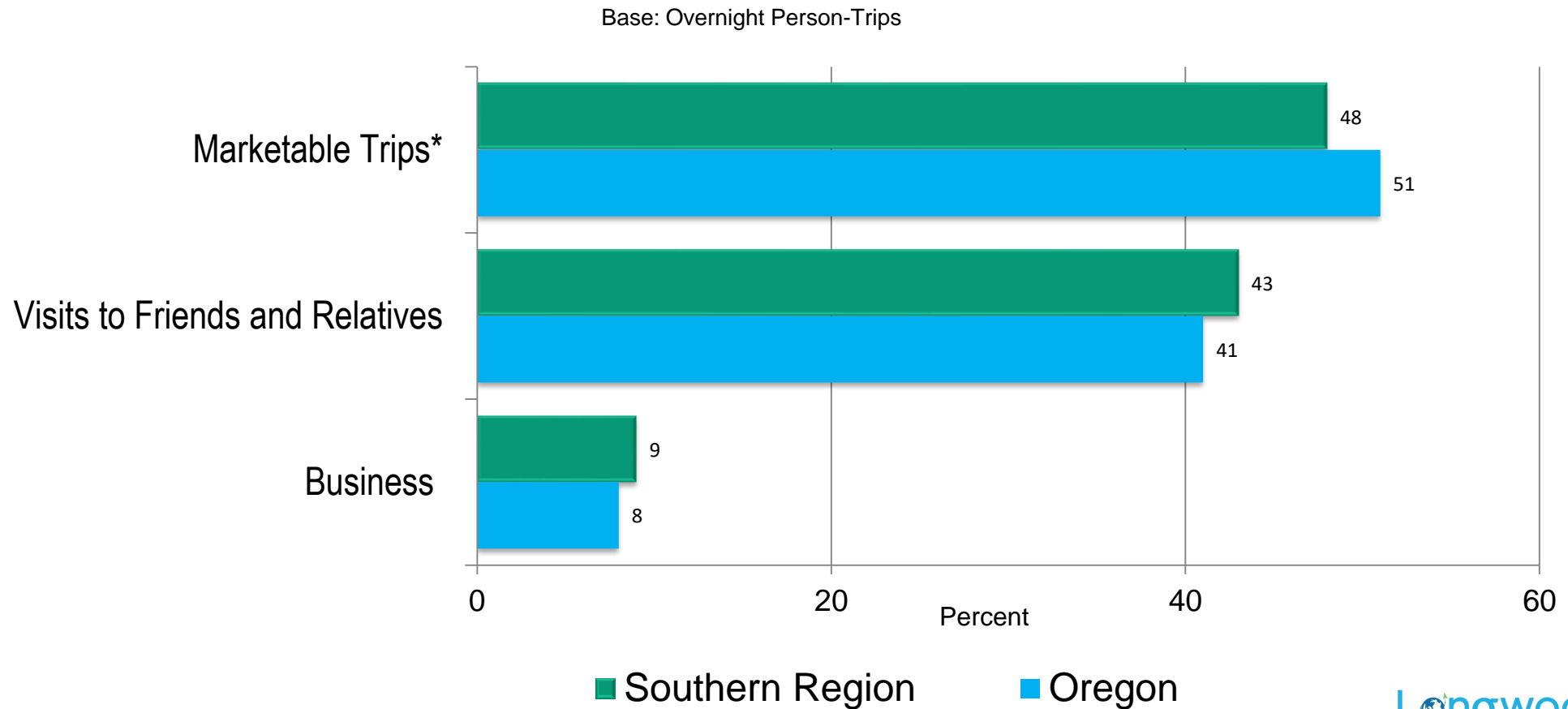
The Southern Region's Overnight Travel Market — by Main Trip Purpose

Total Overnight Trips to the Southern Region = 4 Million



*Marketable includes Business-Leisure

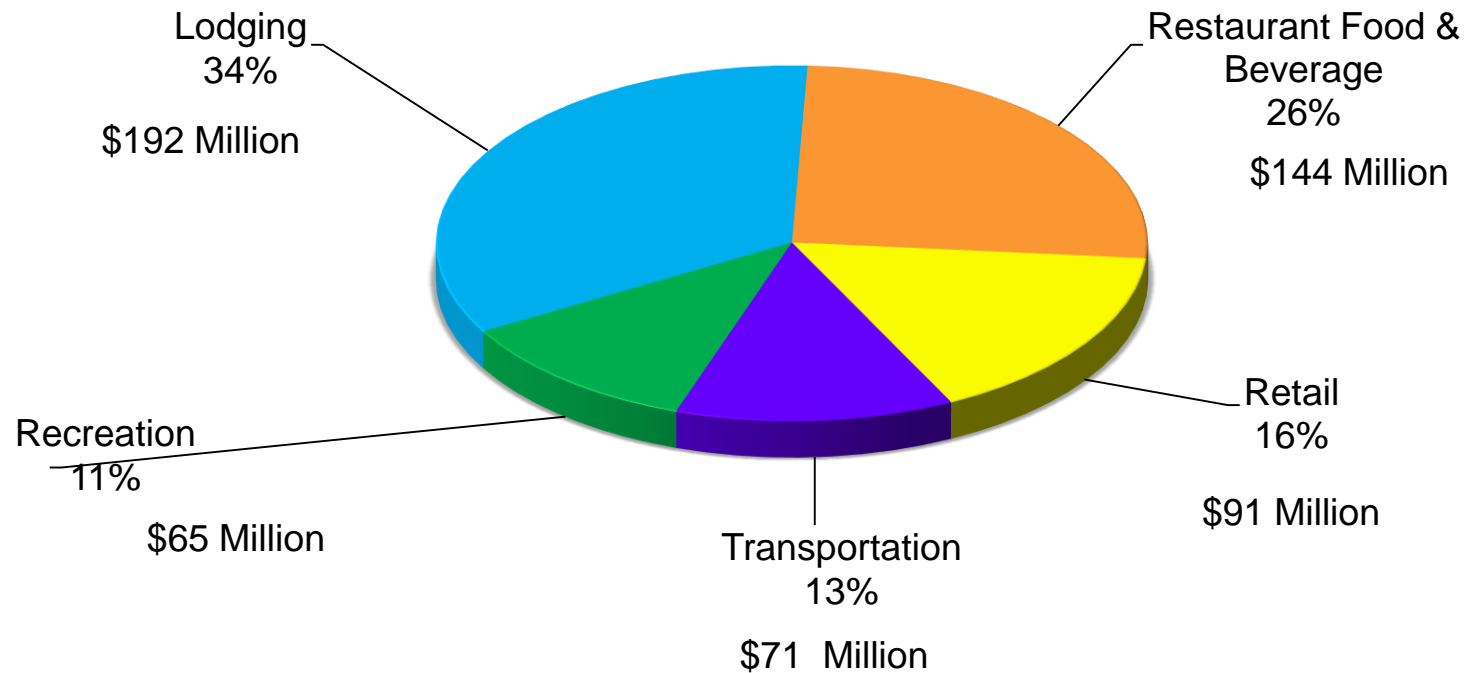
The Southern Region vs. Oregon State—by Trip Purpose



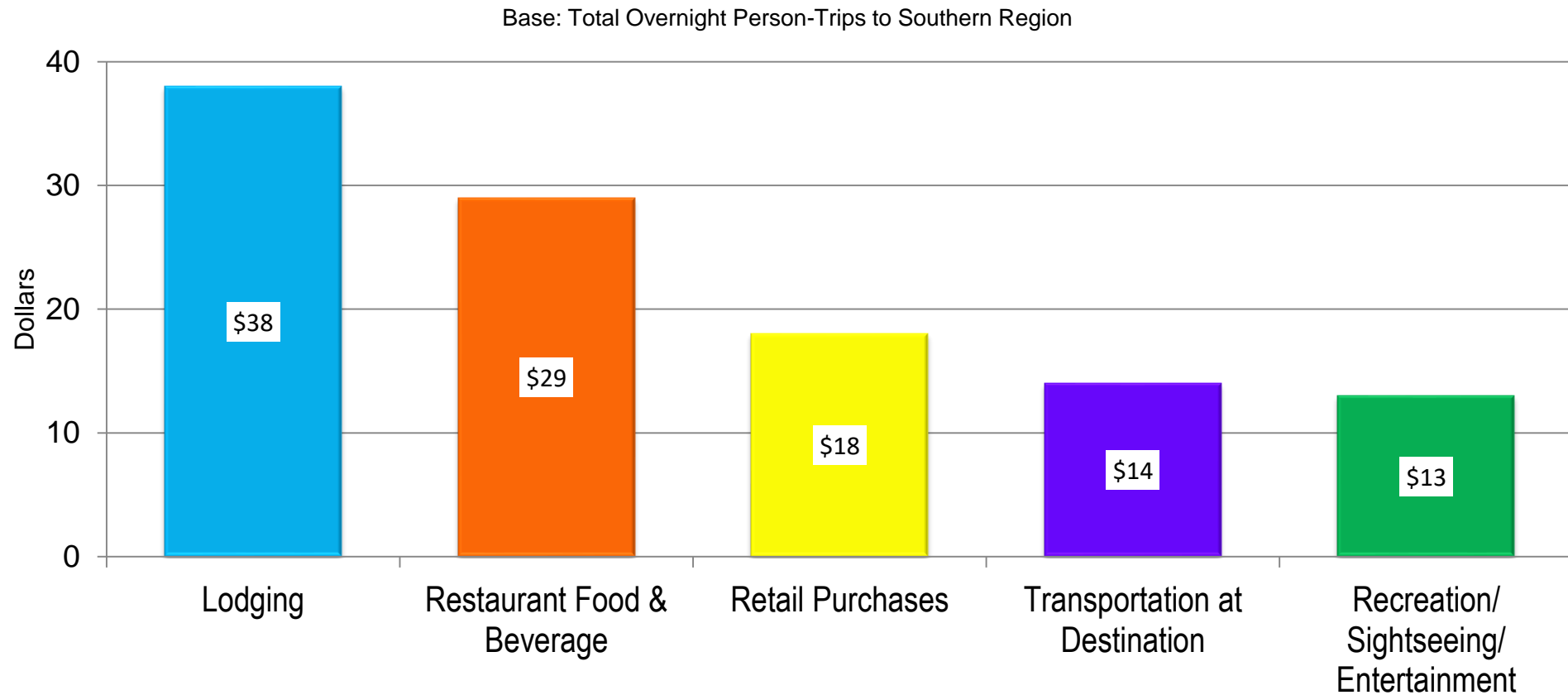
*Marketable includes Business-Leisure

2017 Overnight Expenditures — by Sector

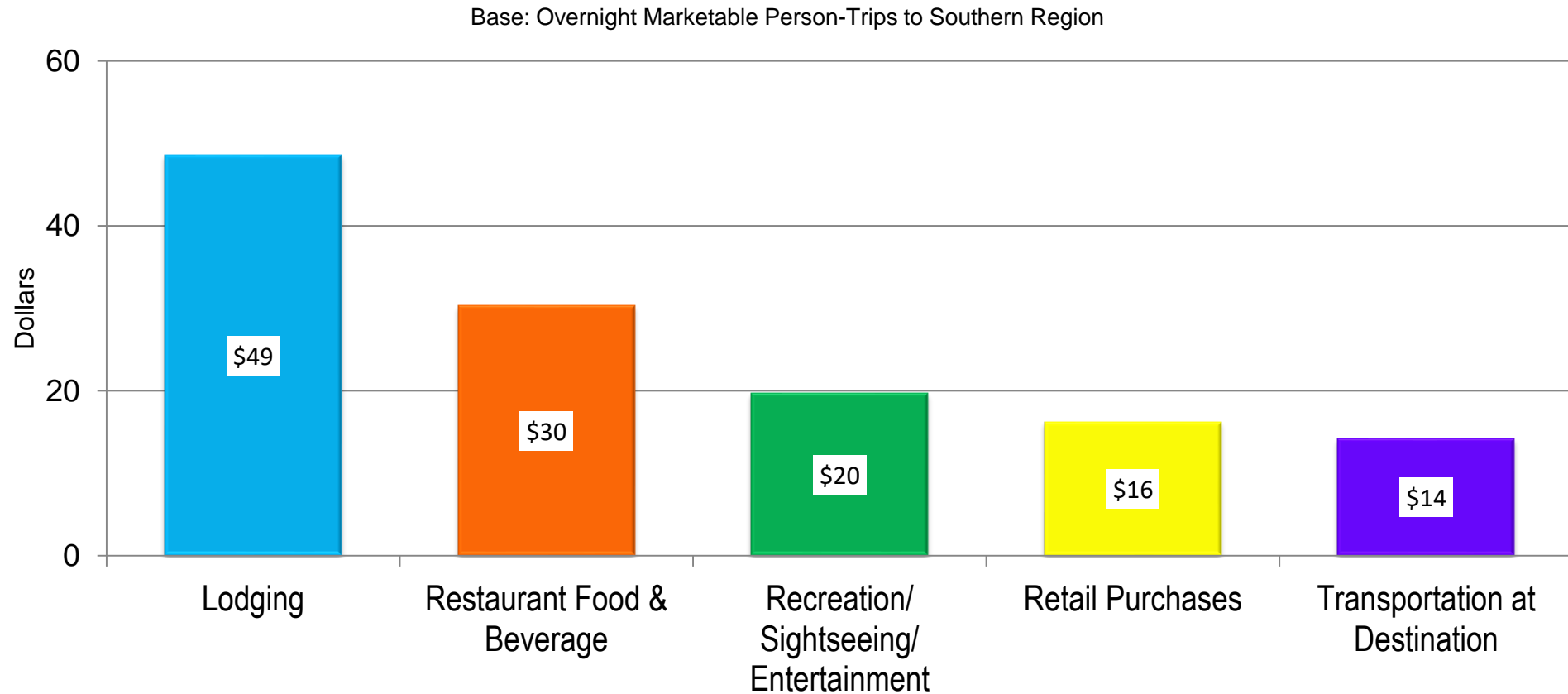
2017 Southern Region Spending = \$563 Million



Average Per Person Expenditures on Overnight Trips — By Sector



Average Per Person Expenditures on Overnight Marketable Trips — By Sector

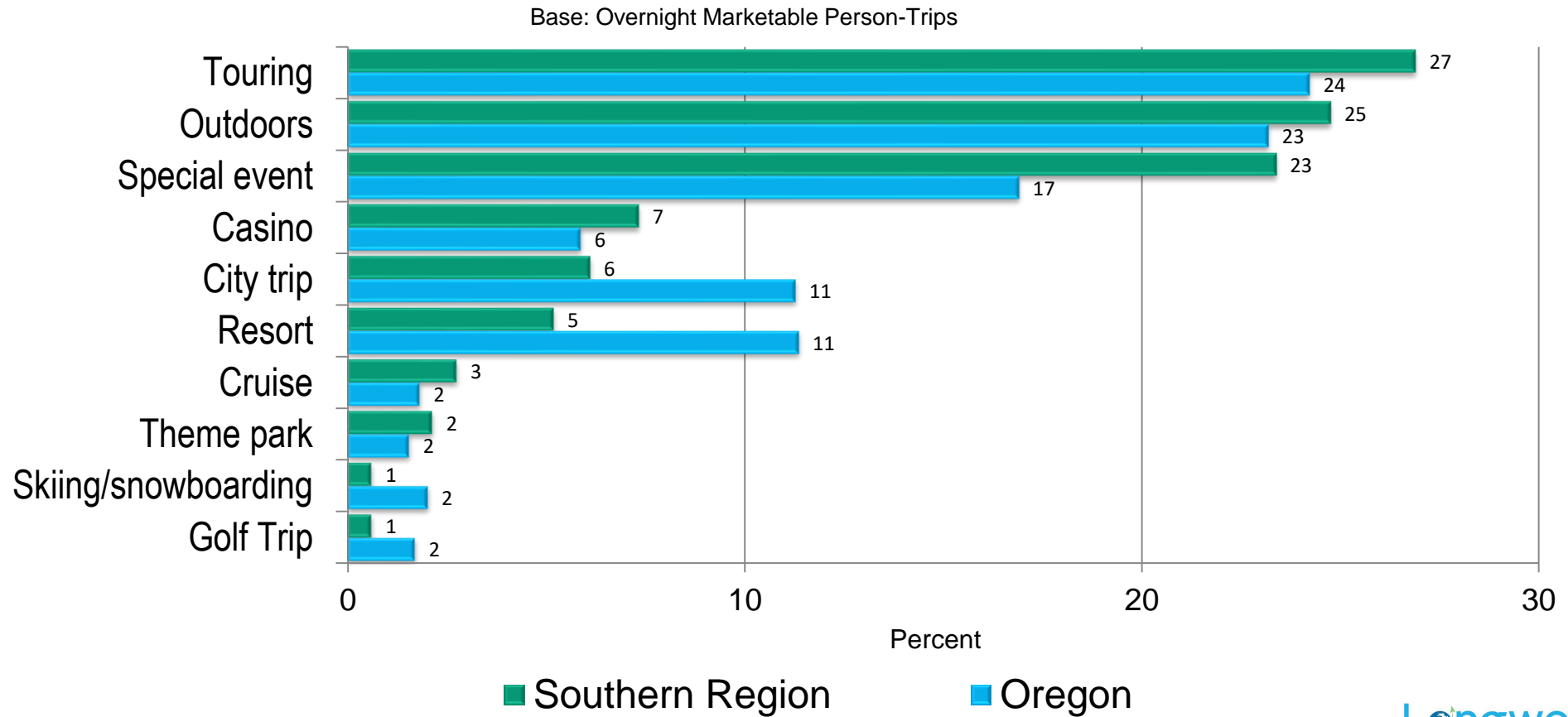




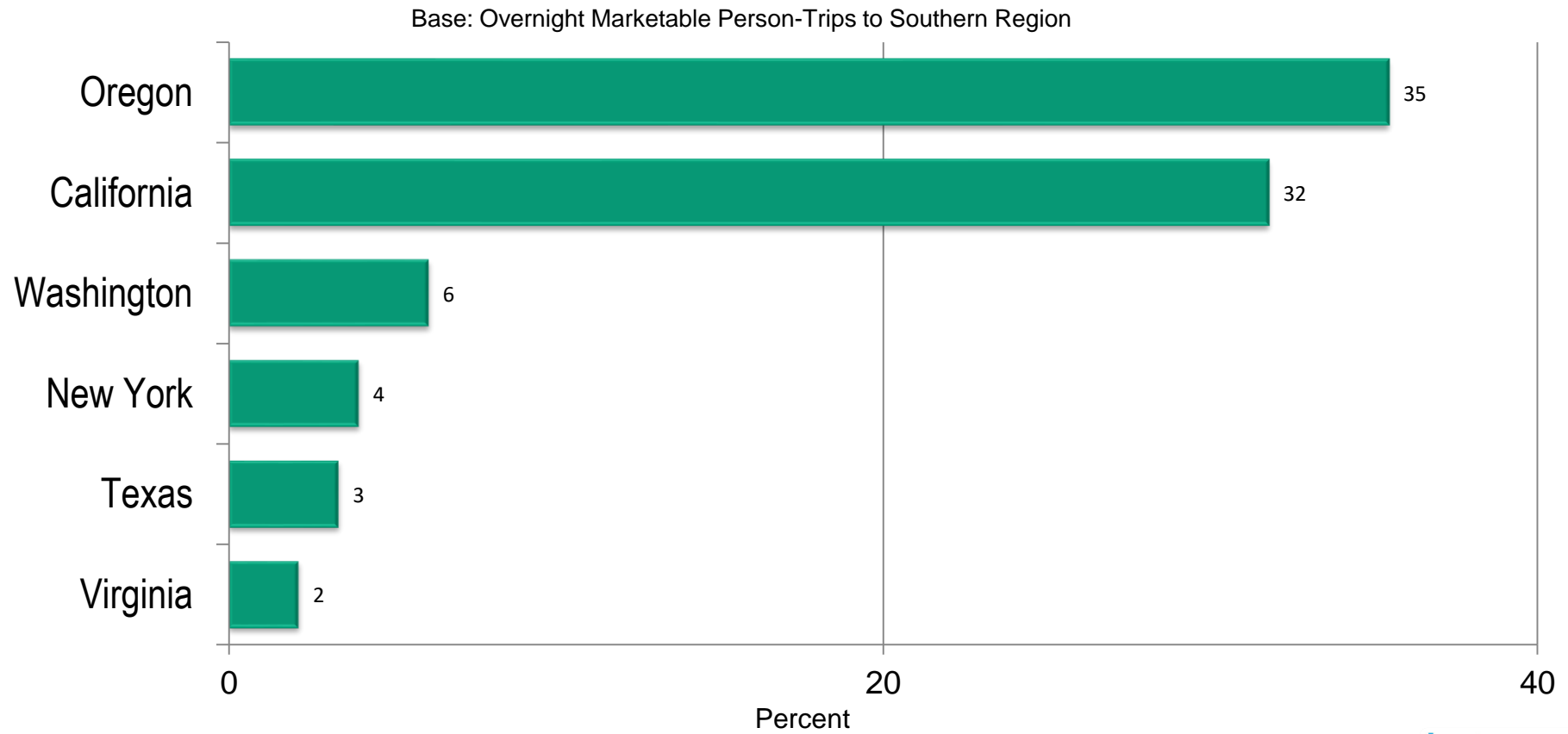
Marketable Trip Characteristics and Visitor Profile- 2016/2017



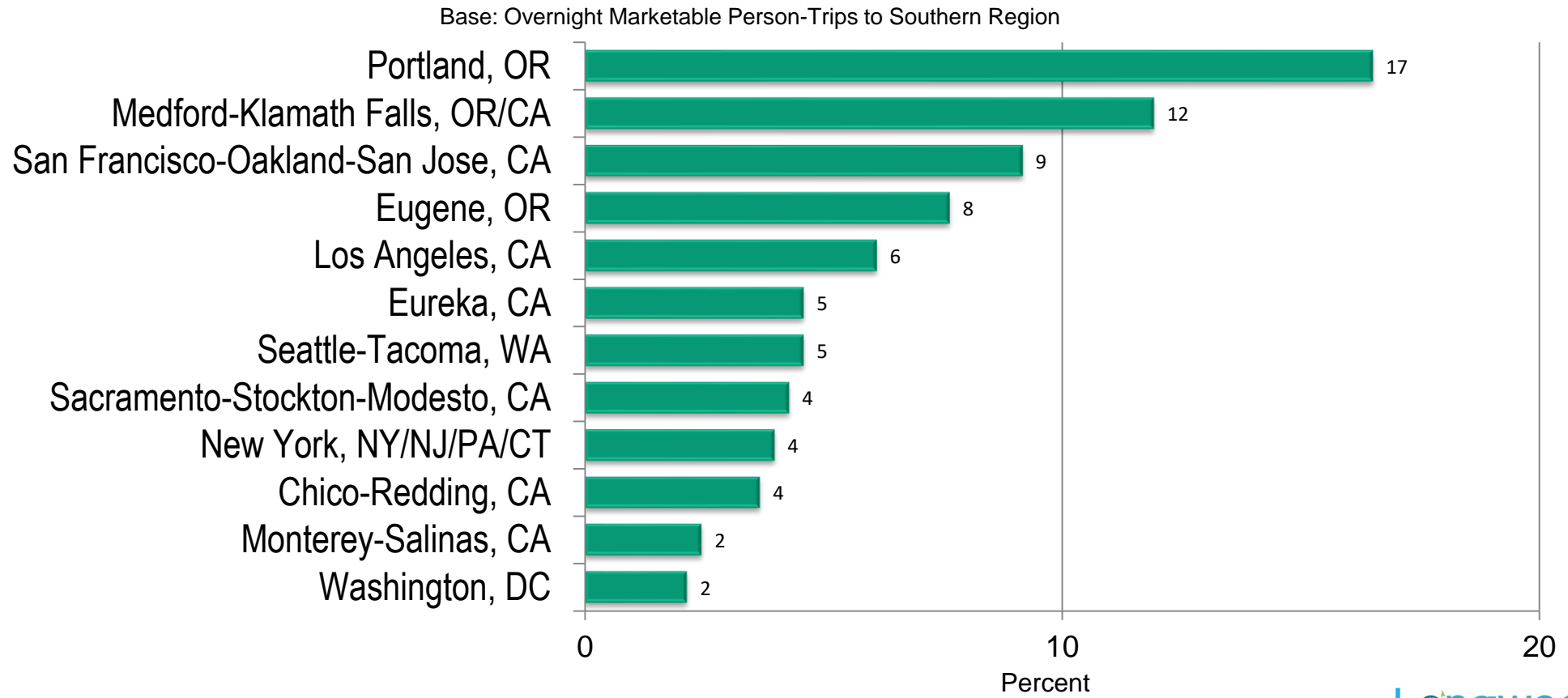
Main Purpose of Marketable Trip – The Southern Region vs. State Norm



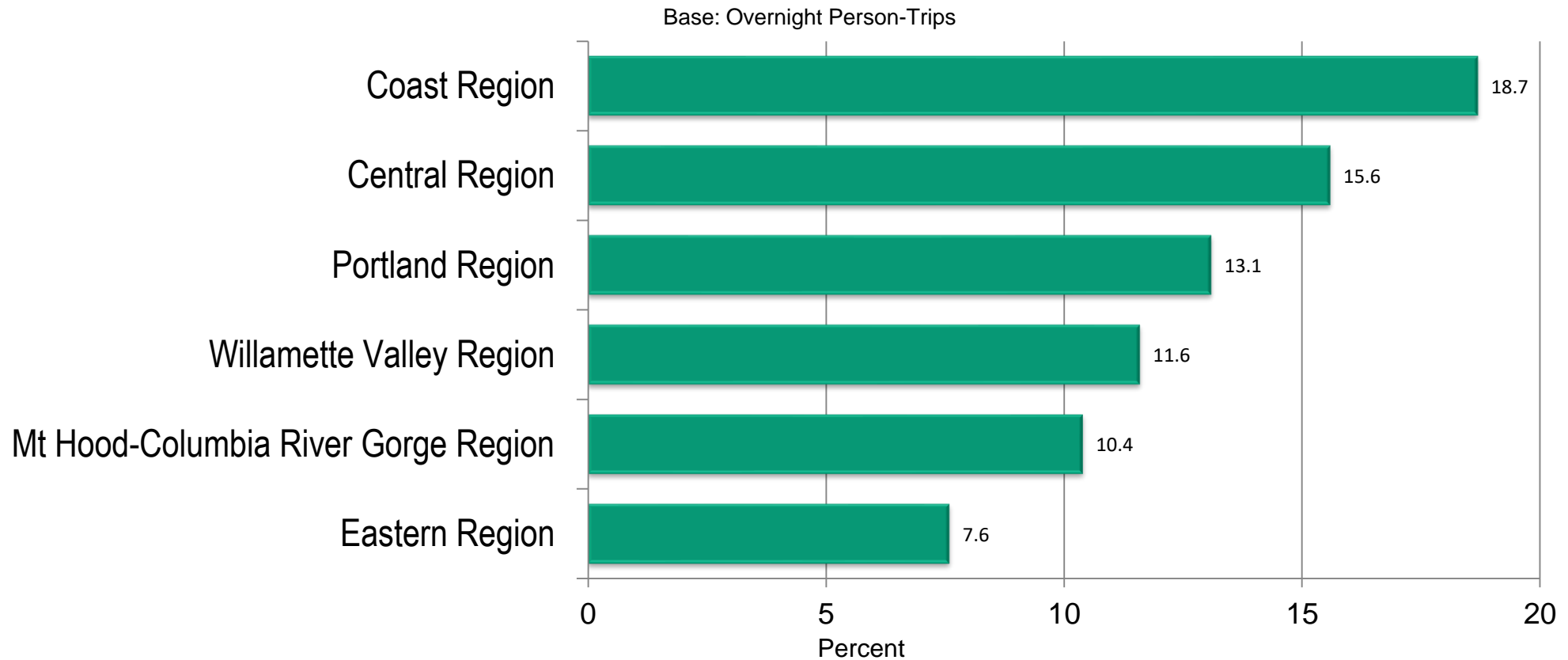
State Origin Of Trip



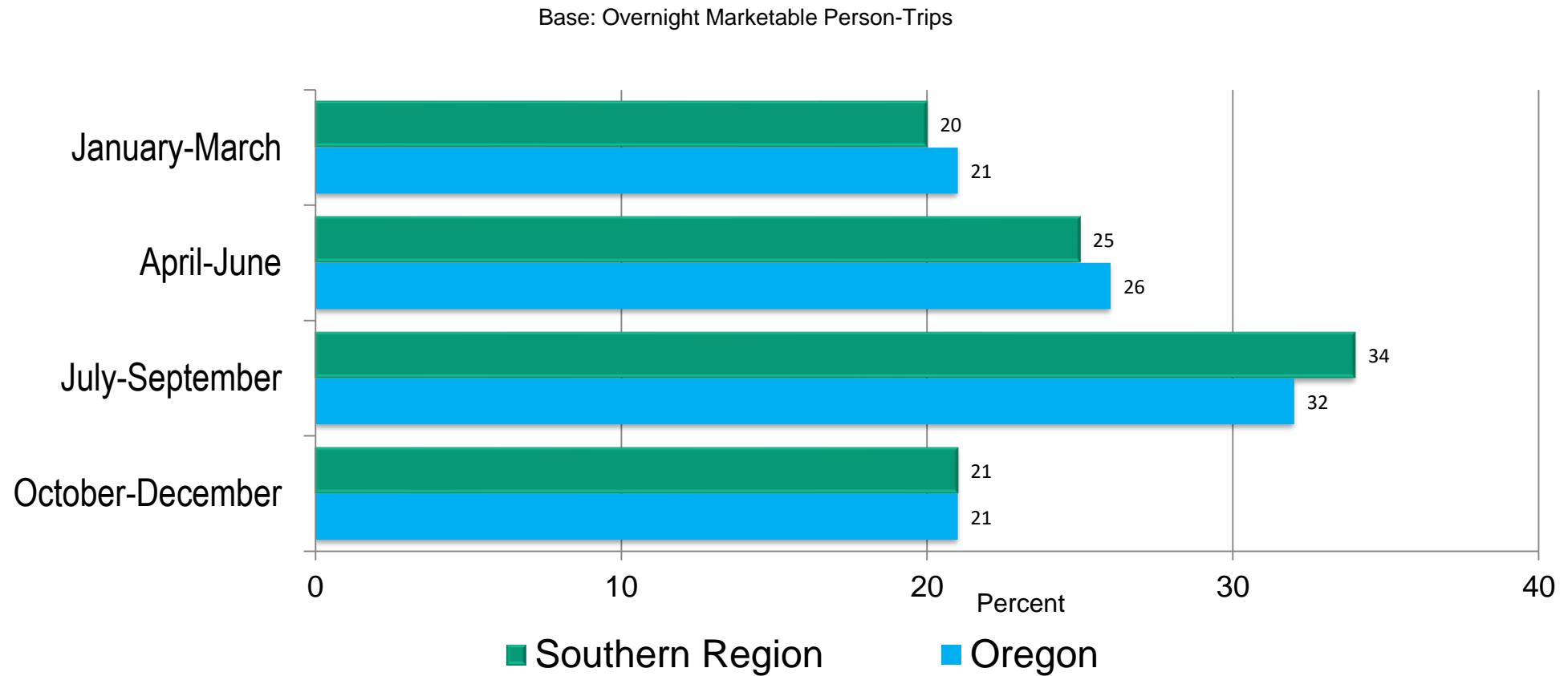
DMA Origin Of Trip



Other Oregon Regions Visited on Southern Region Trip

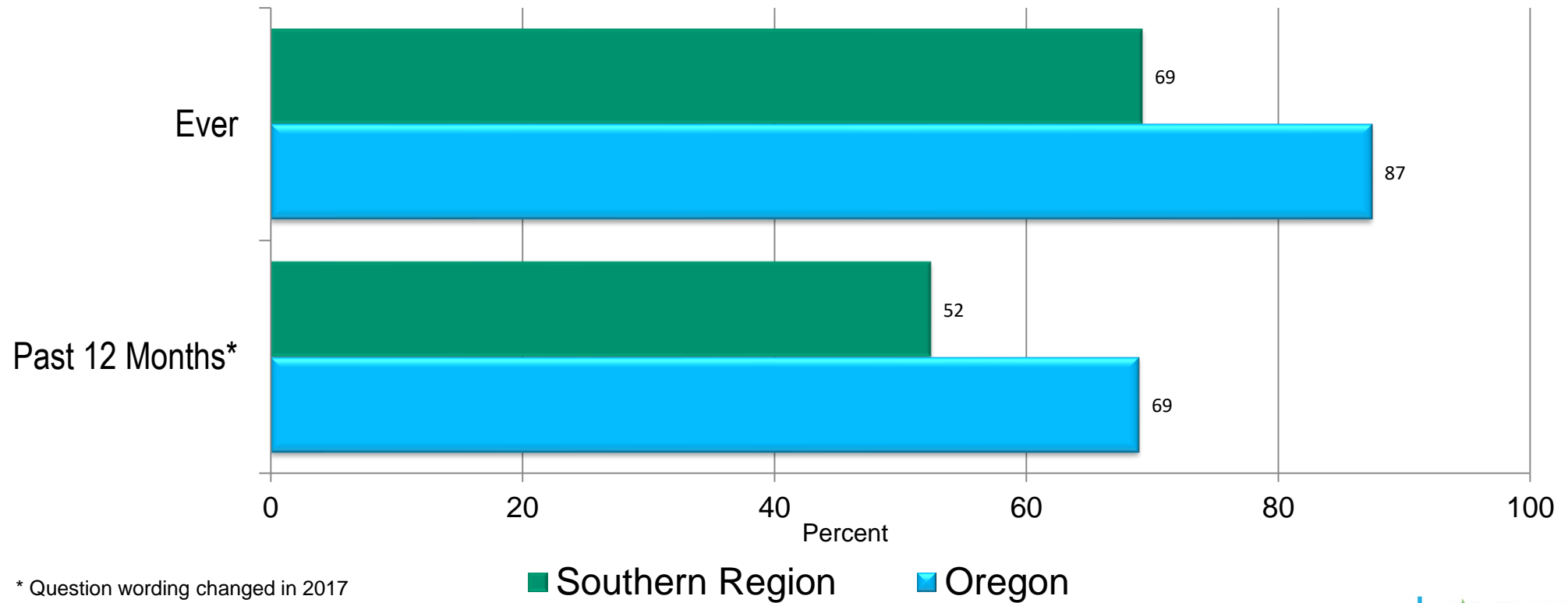


Season of Trip

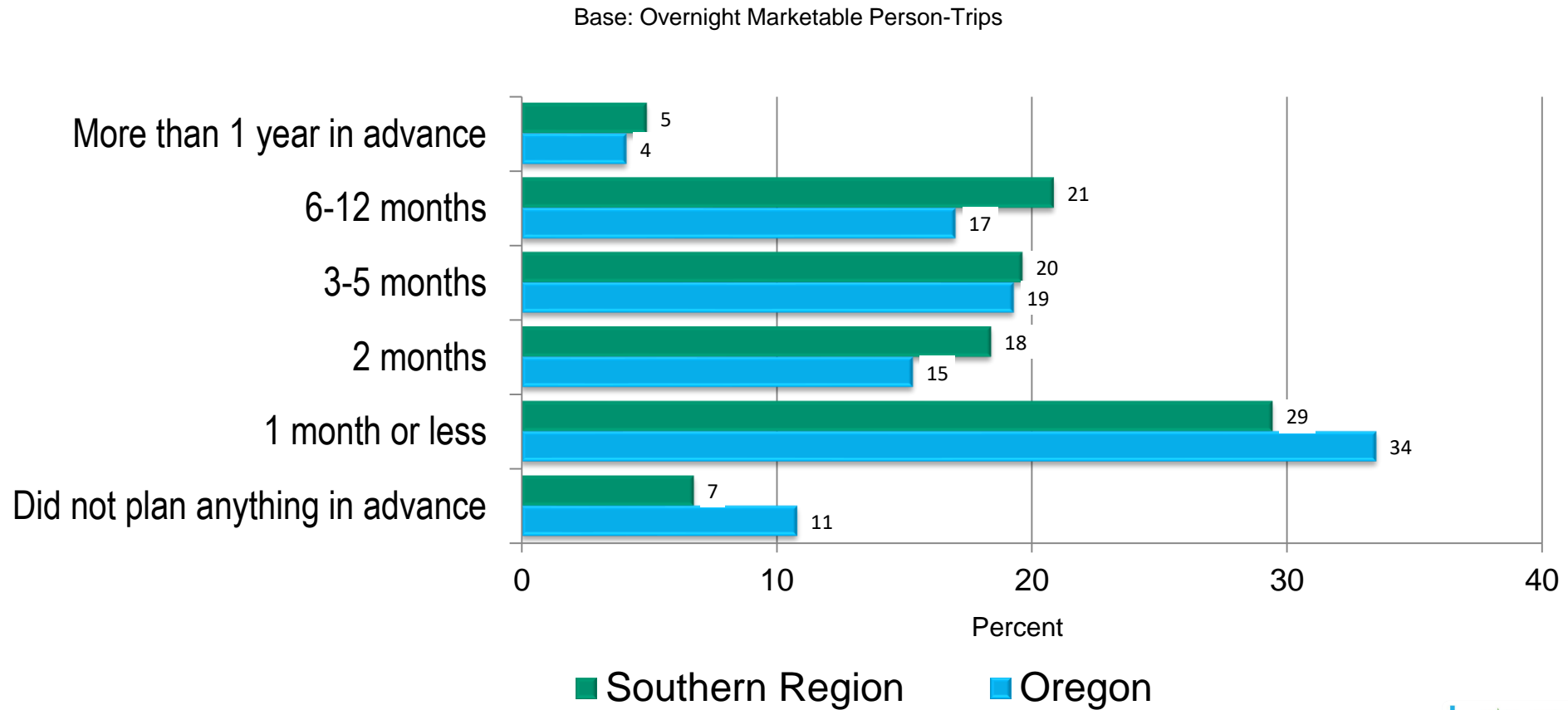


Past Visitation to Oregon*

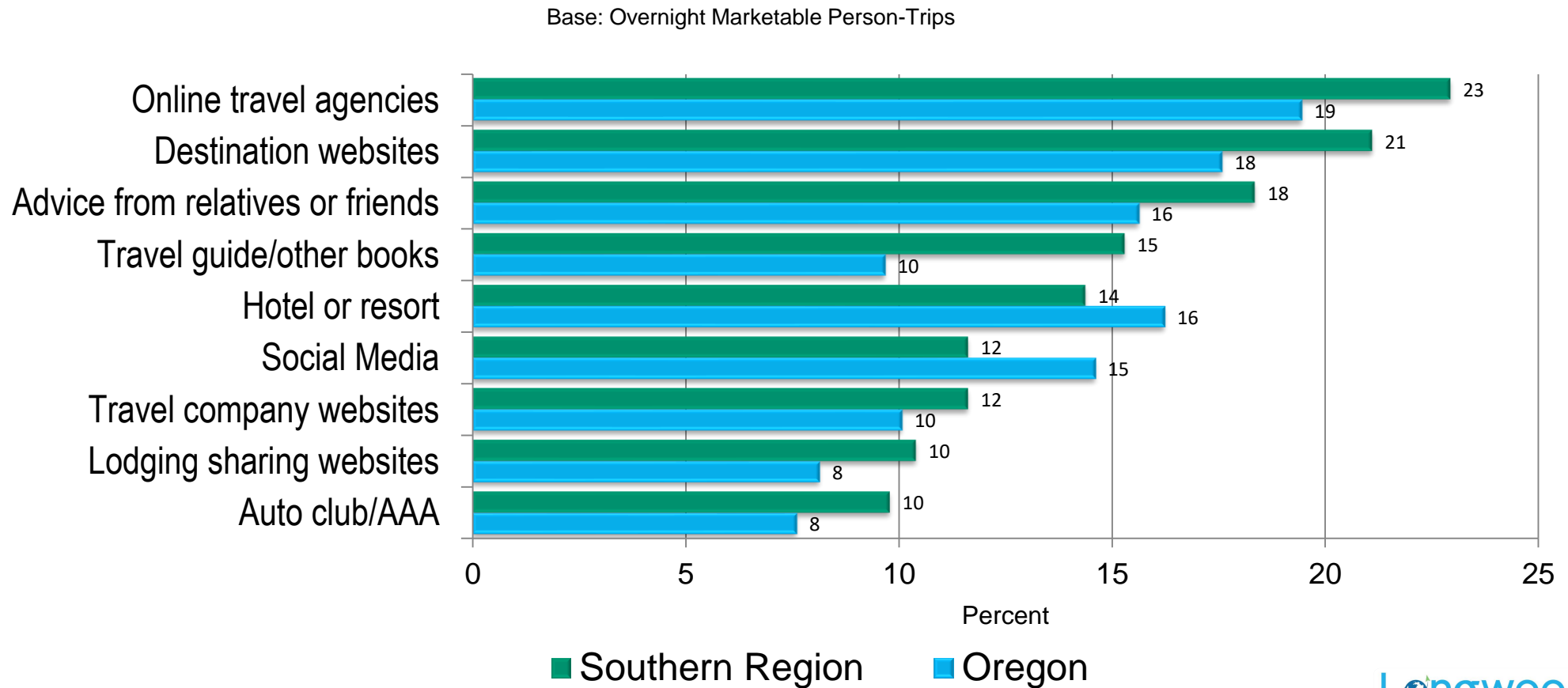
Base: Overnight Marketable Person-Trips



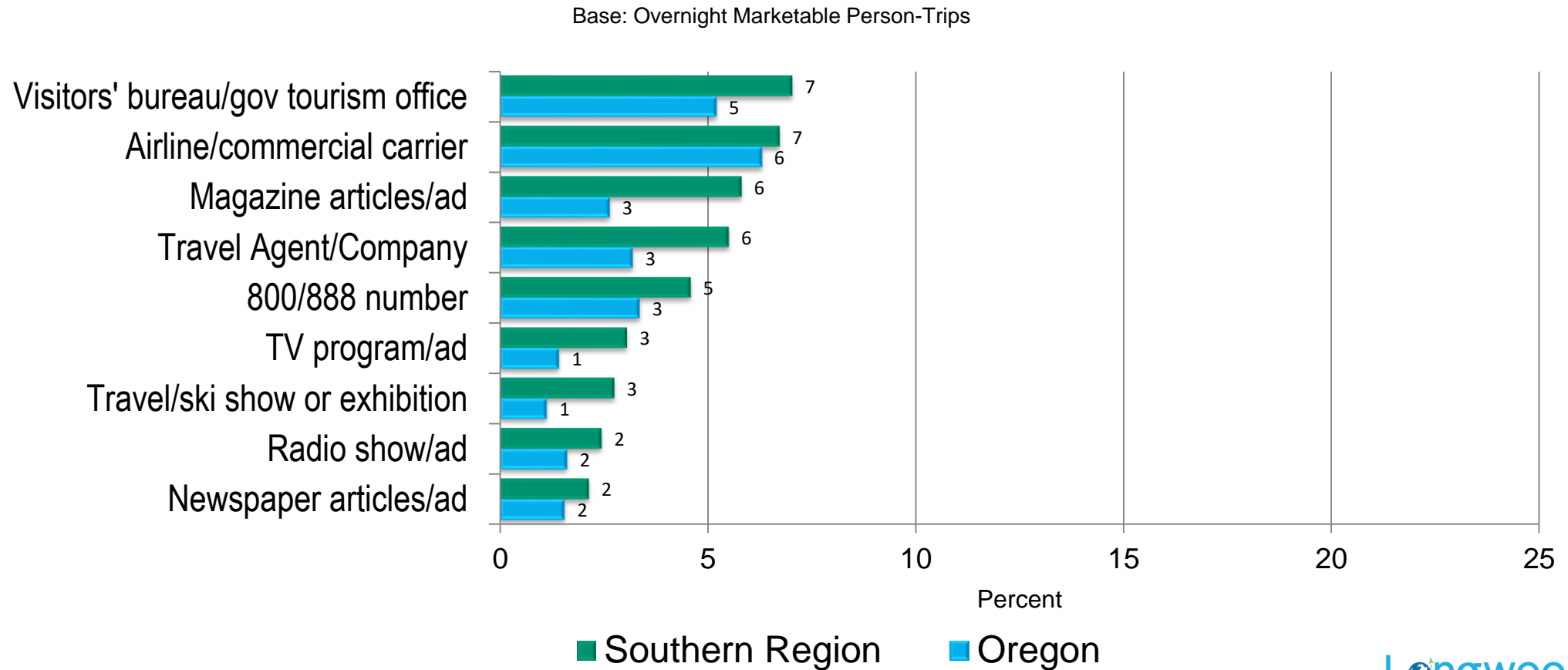
Length of Trip Planning



Trip Planning Information Sources

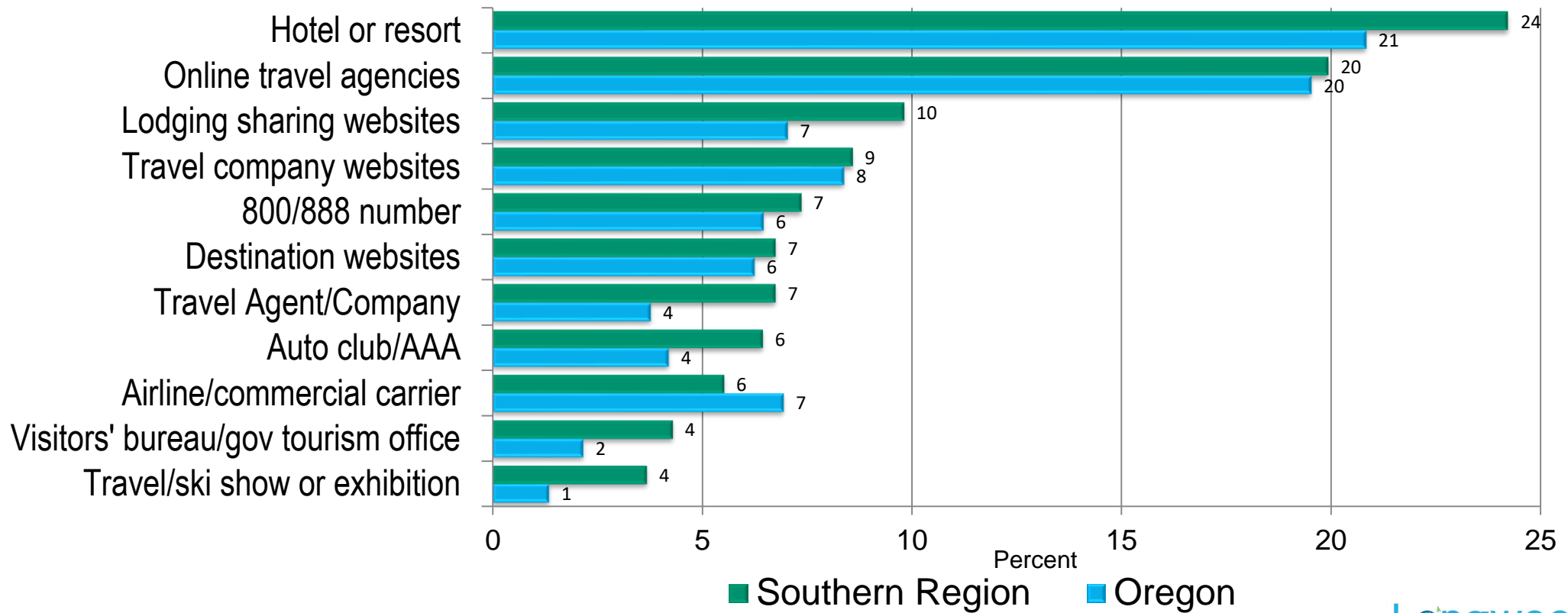


Trip Planning Information Sources (Cont'd)

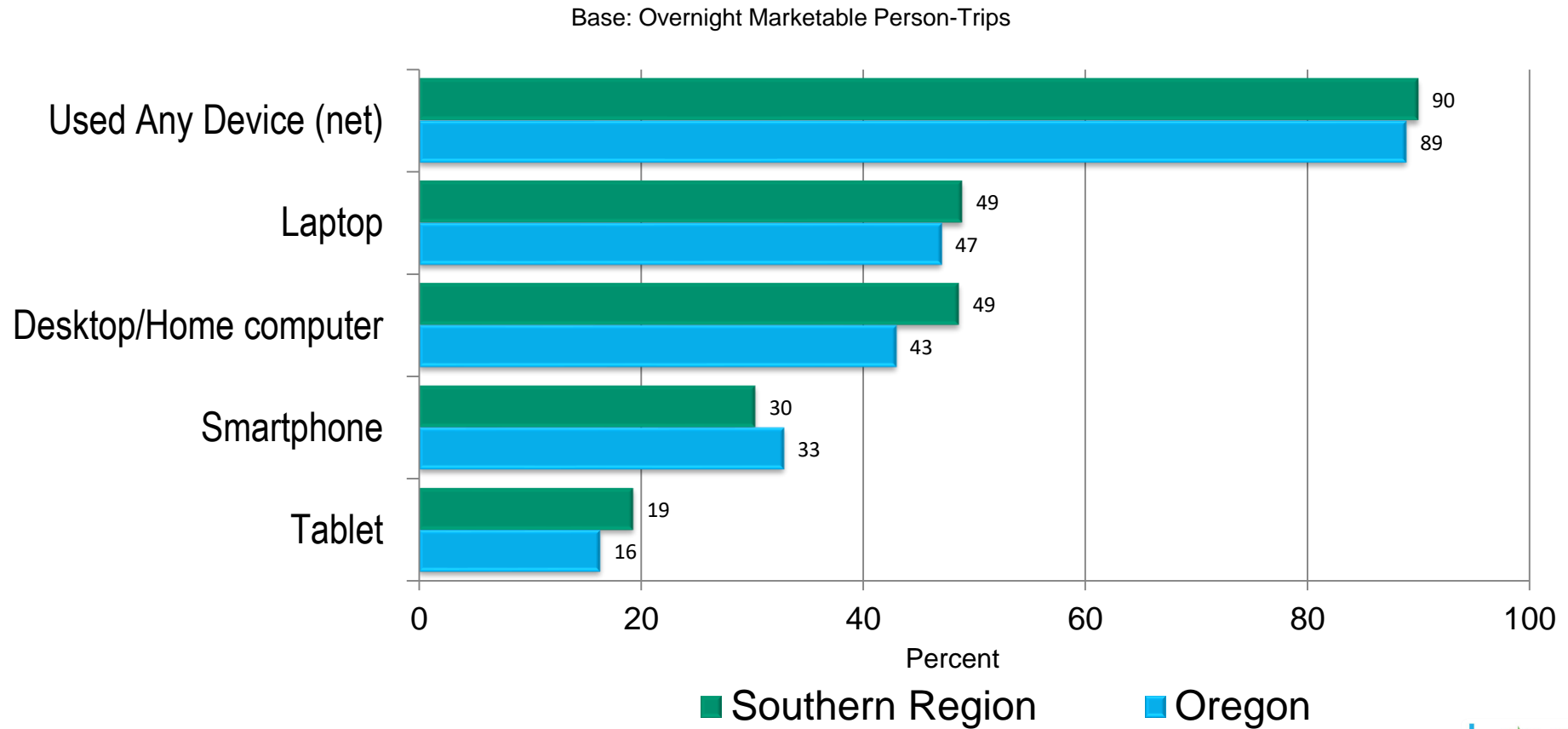


Method of Booking

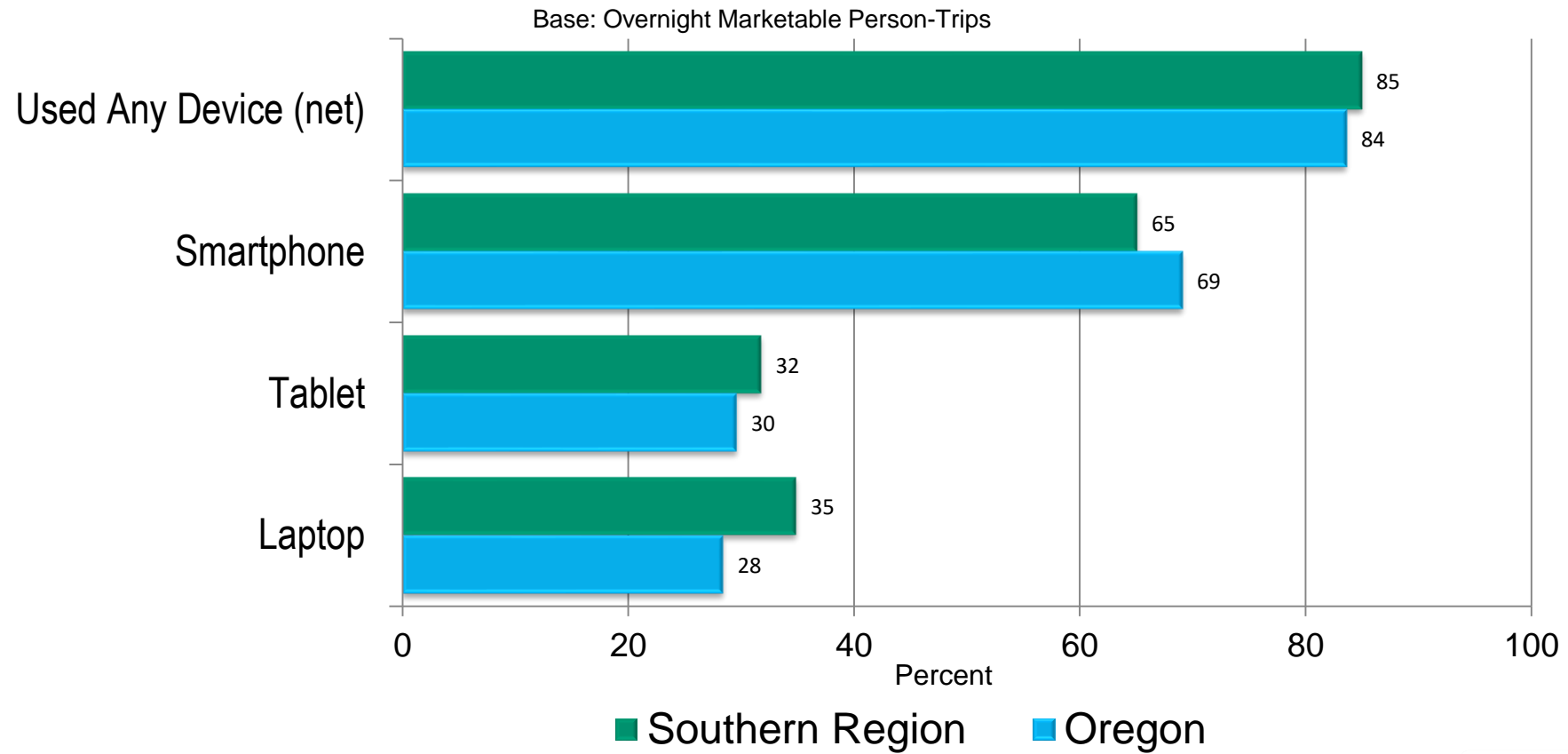
Base: Overnight Marketable Person-Trips



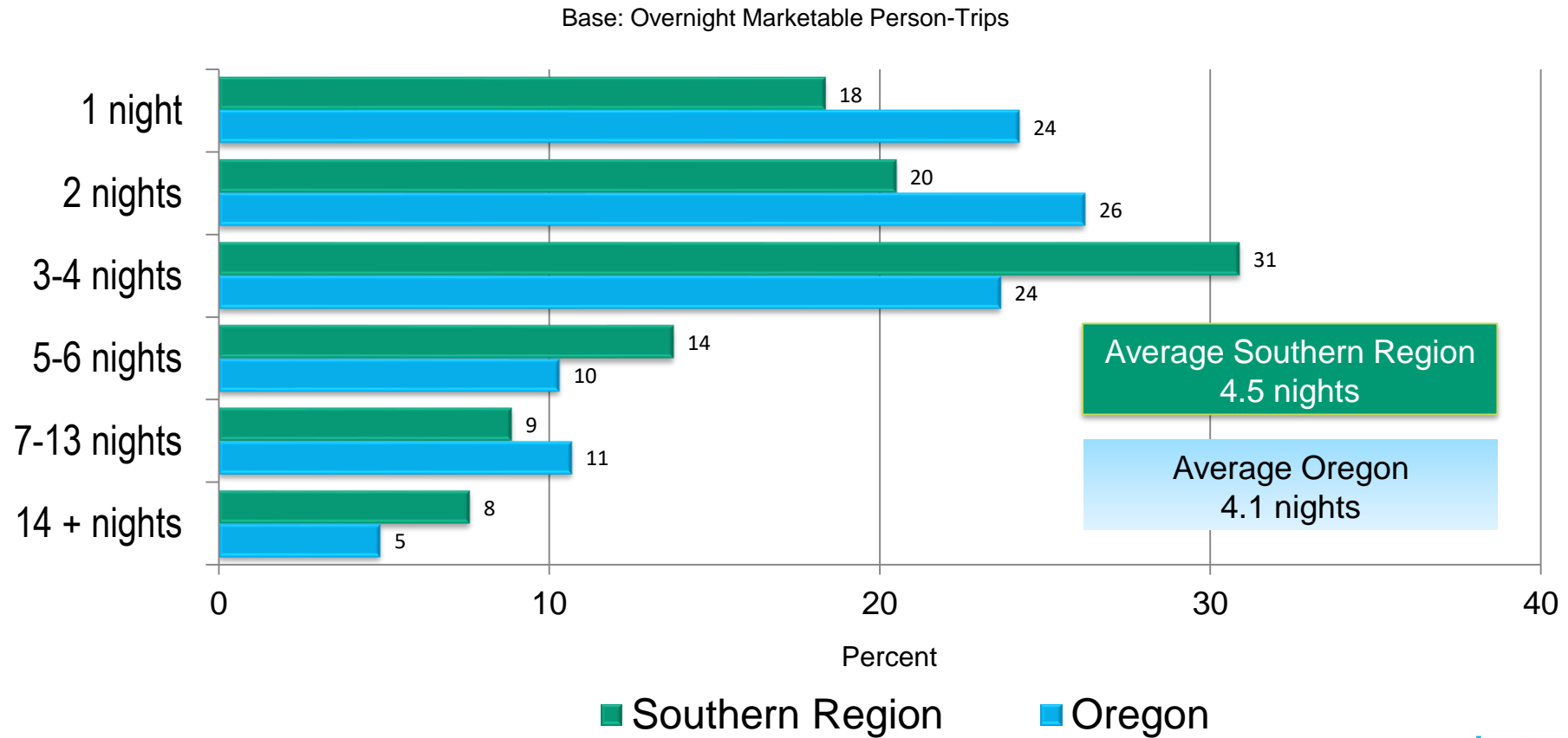
Devices Used for Trip Planning



Devices Used During Trip

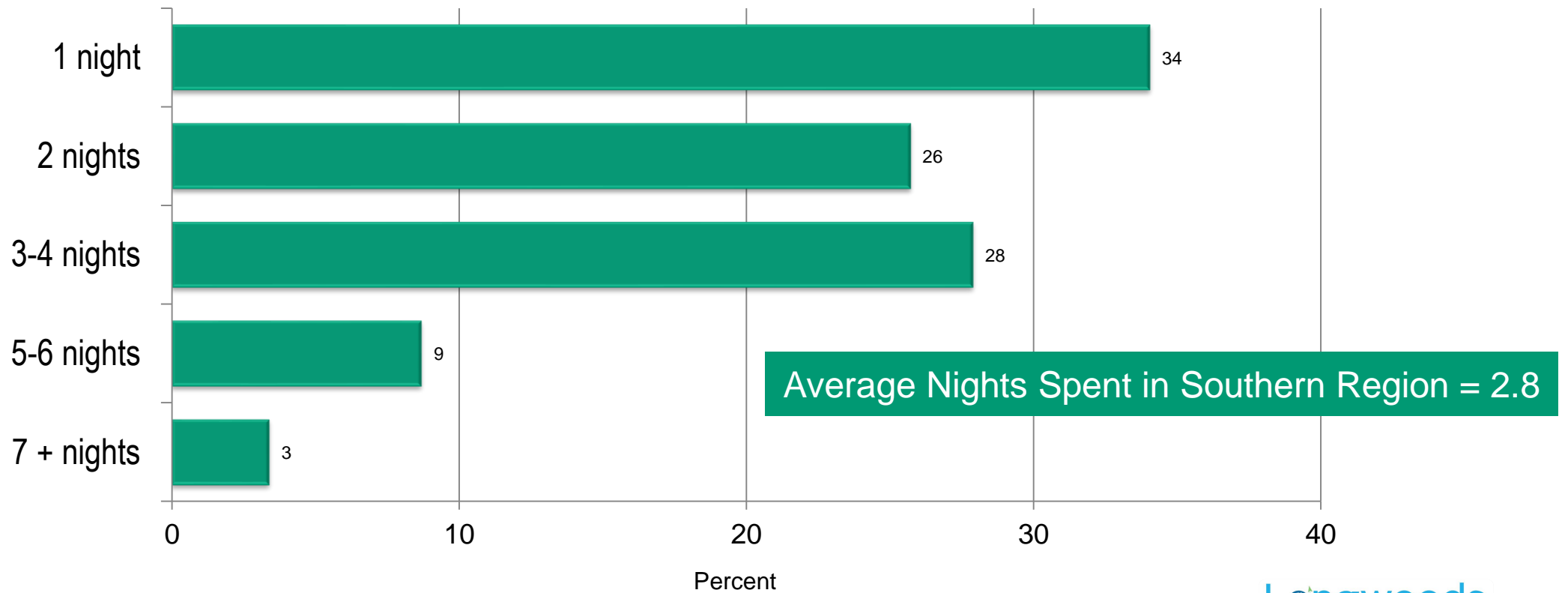


Total Nights Away on Trip

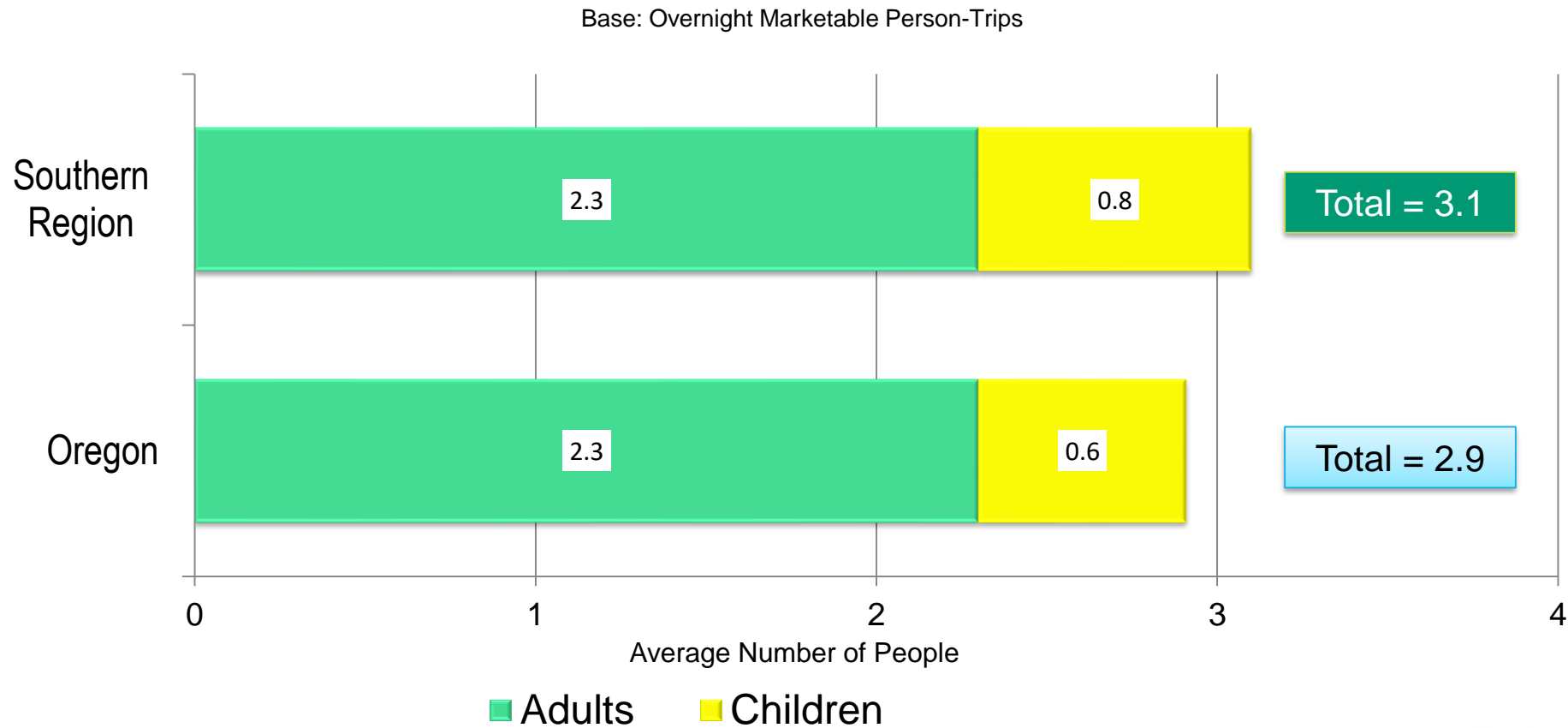


Number of Nights Spent in the Southern Region

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

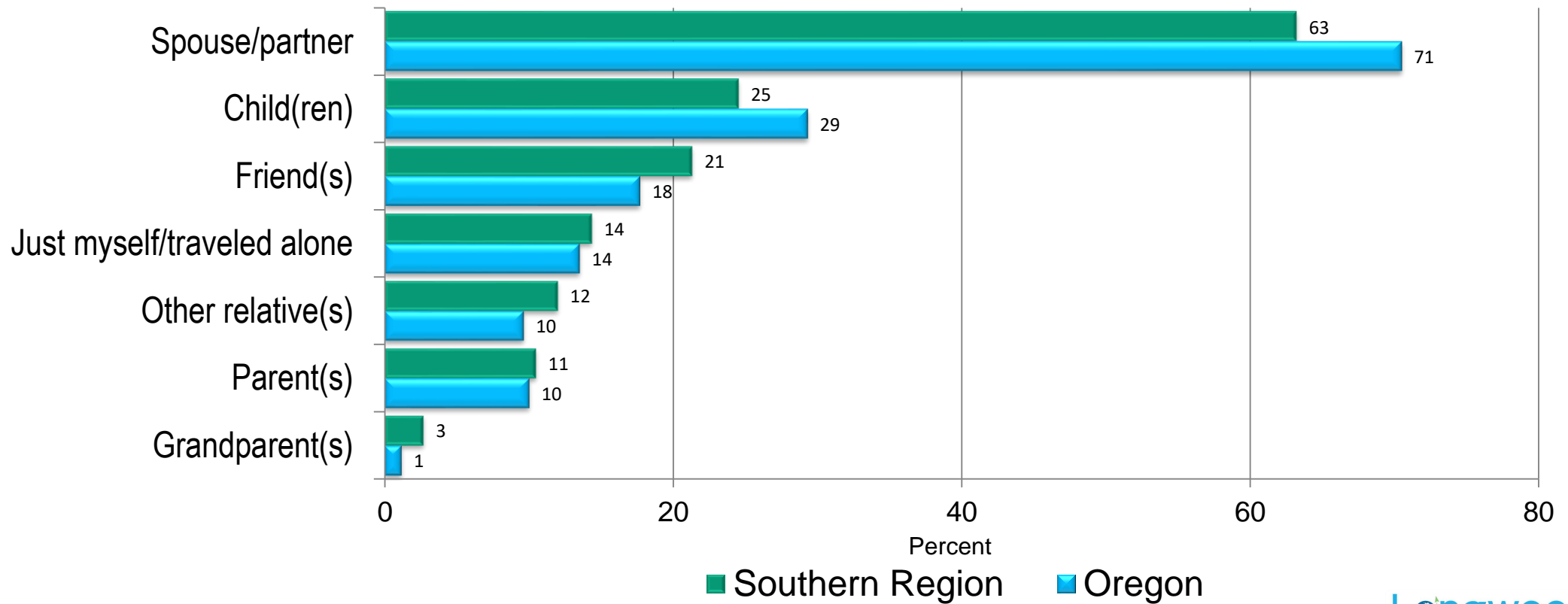


Size of Travel Party



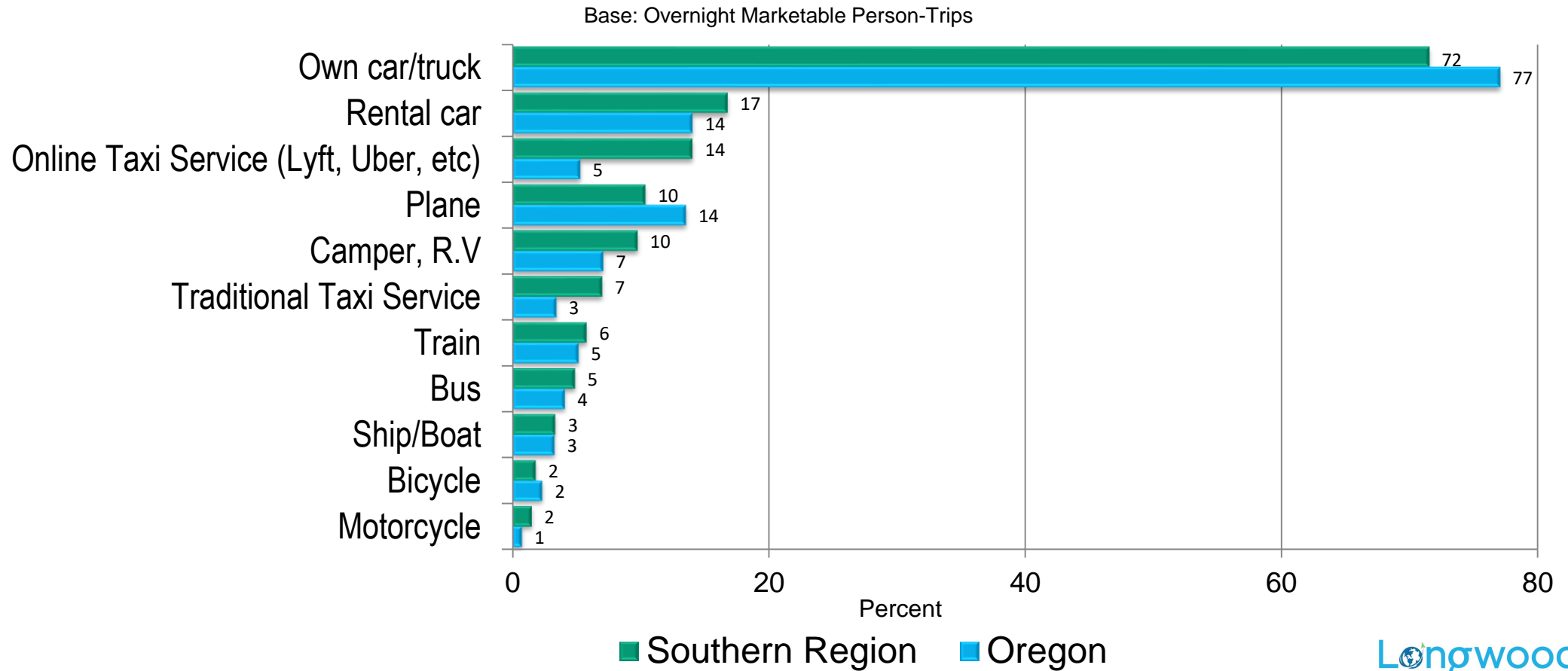
Composition of Immediate Travel Party*

Base: Overnight Marketable Person-Trips

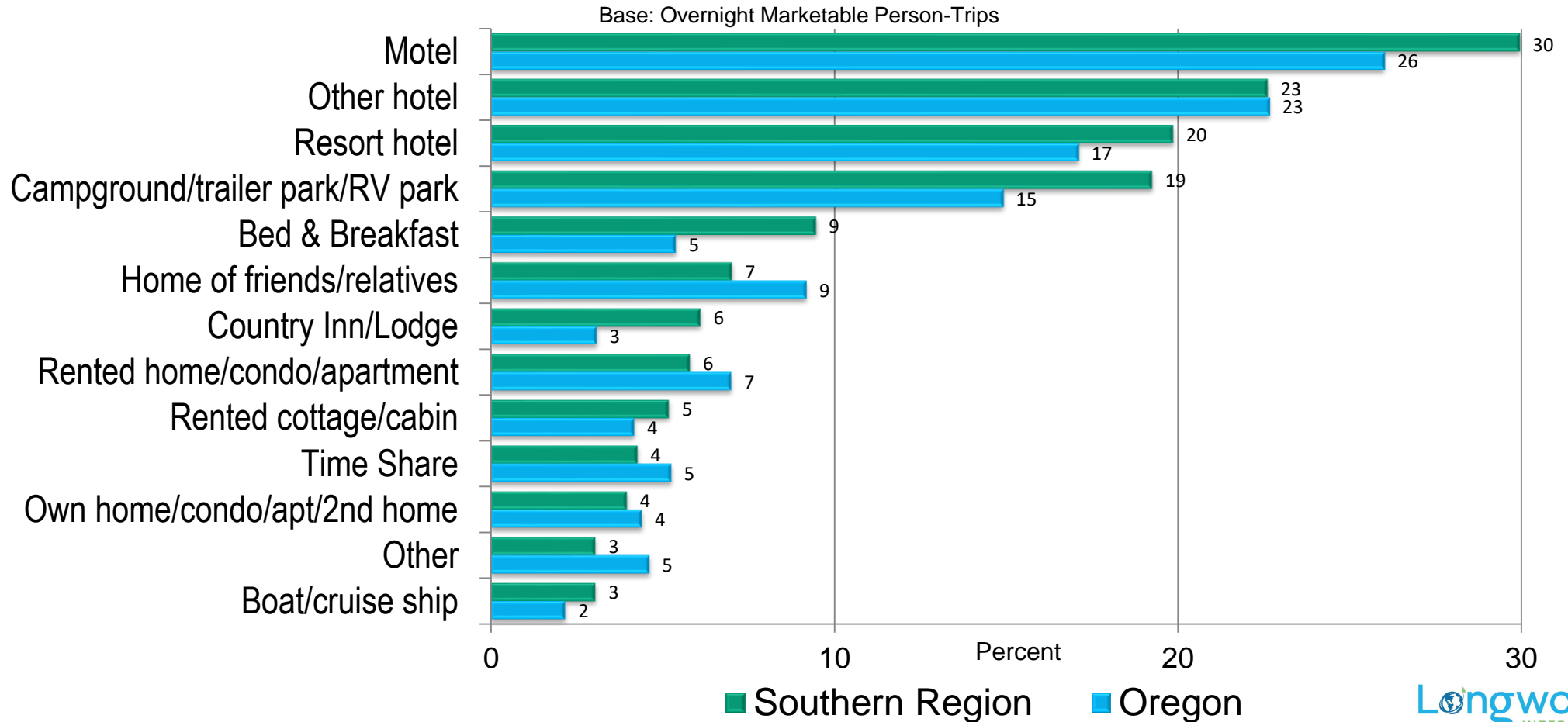


*Question added in 2017; reflects 2017 data only

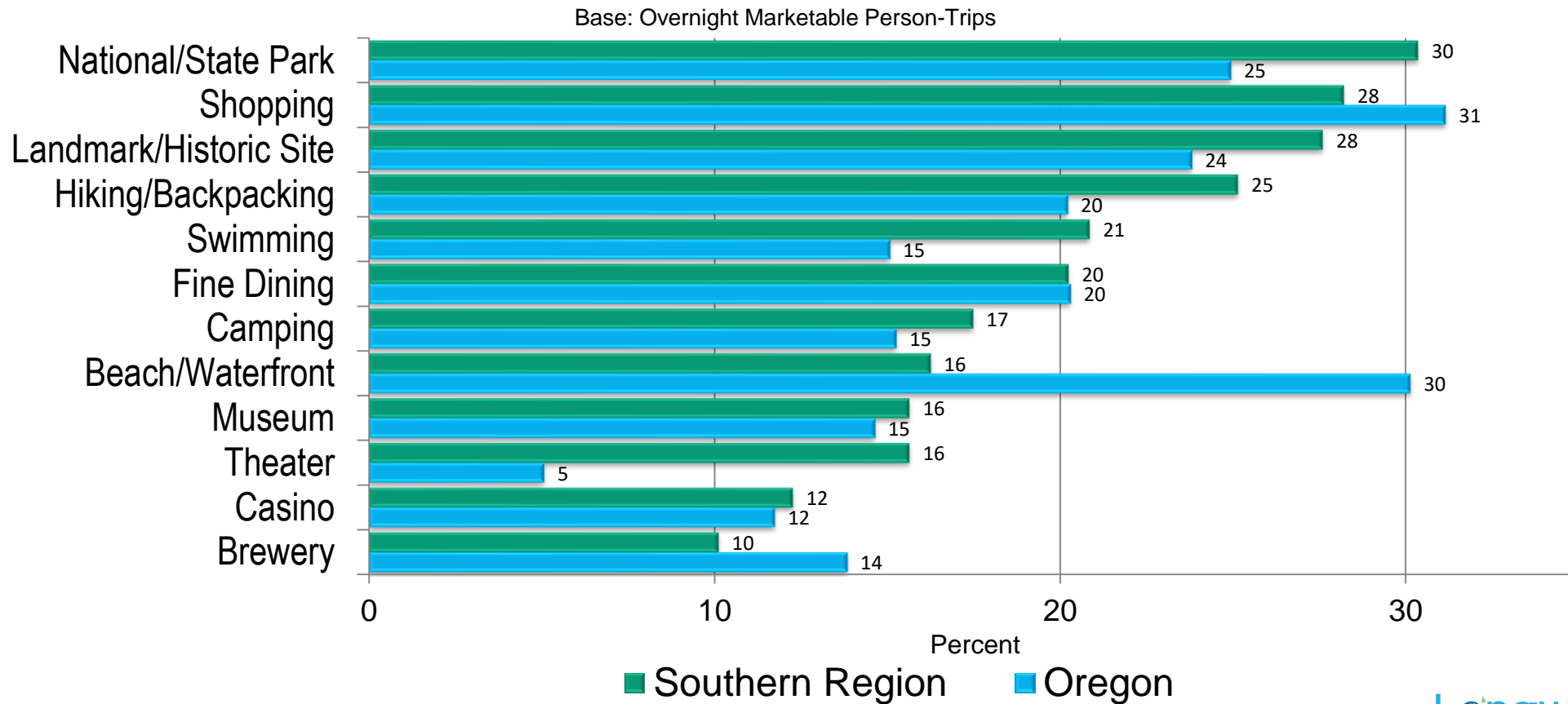
Transportation



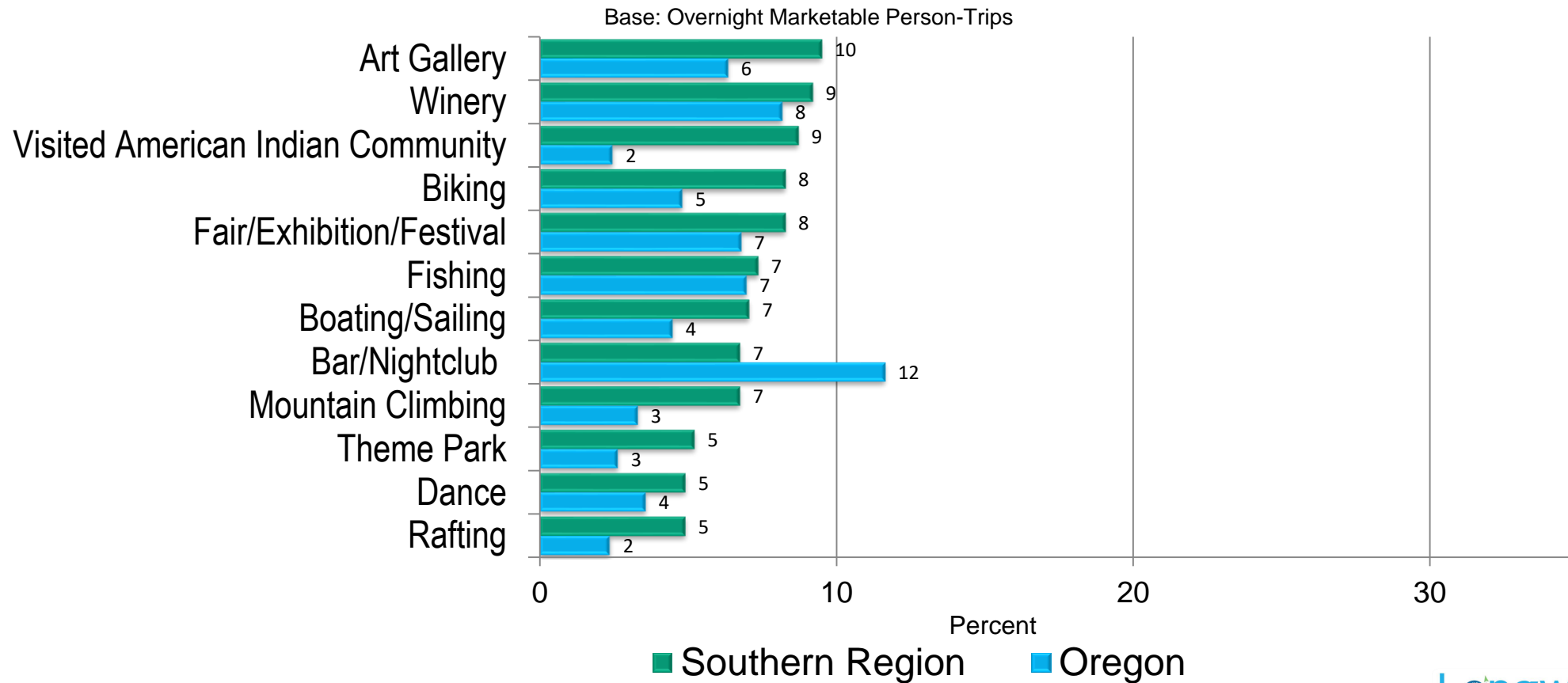
Accommodations



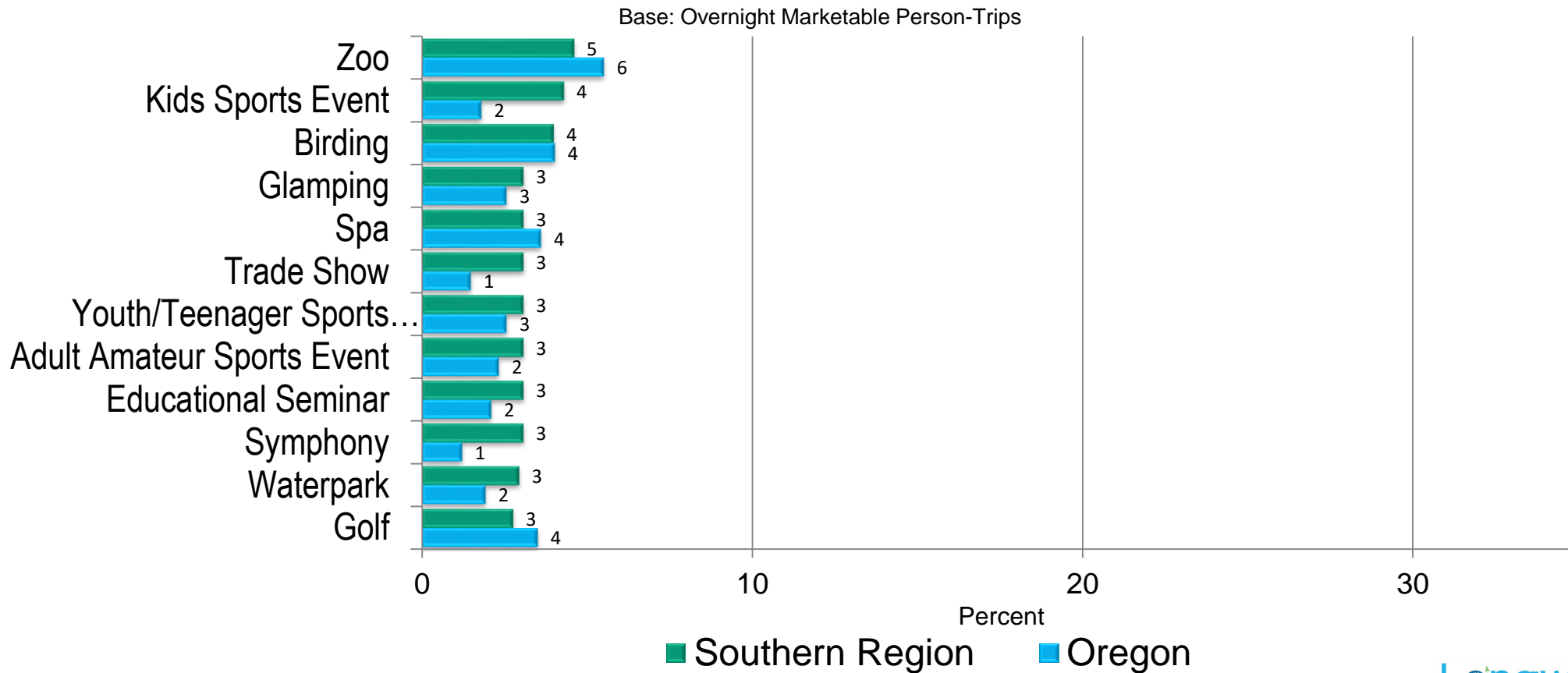
Activities and Experiences



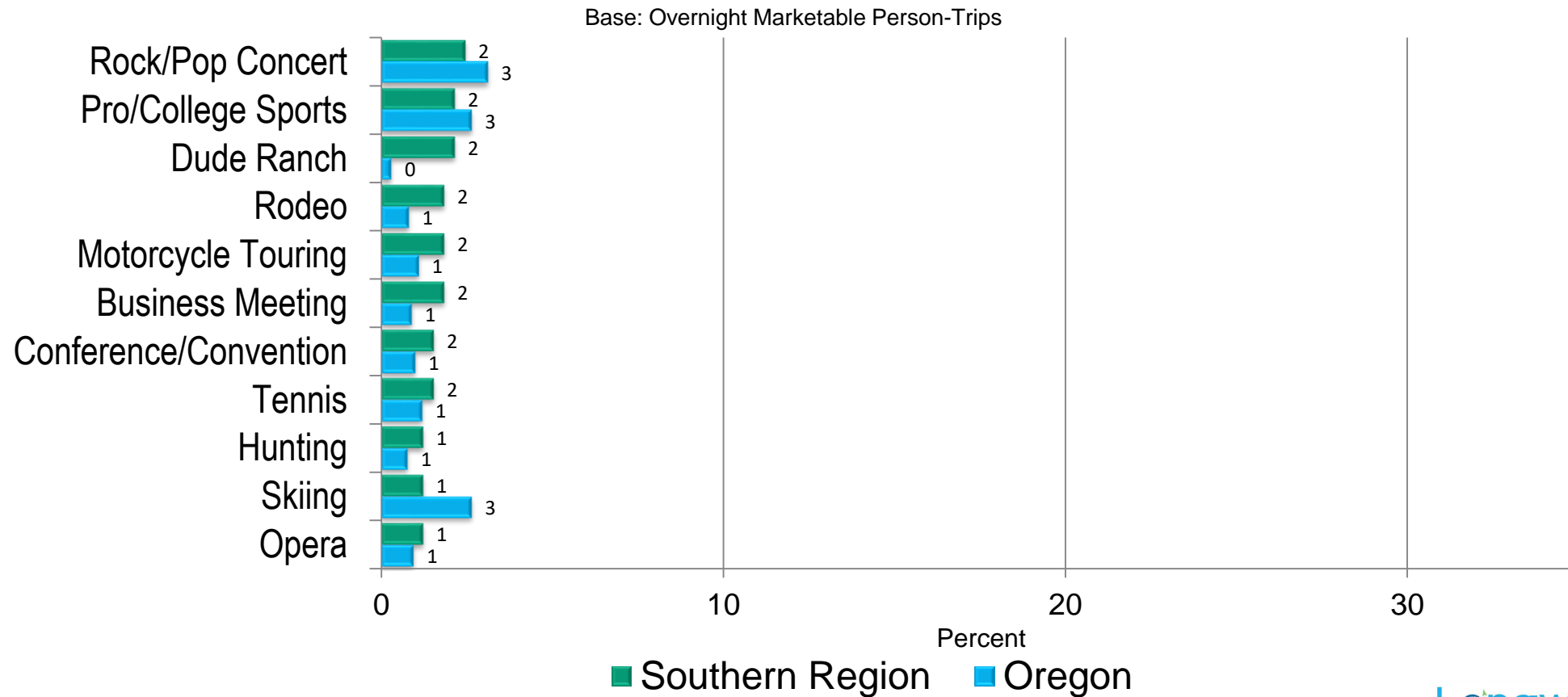
Activities and Experiences (Cont'd)



Activities and Experiences (Cont'd)

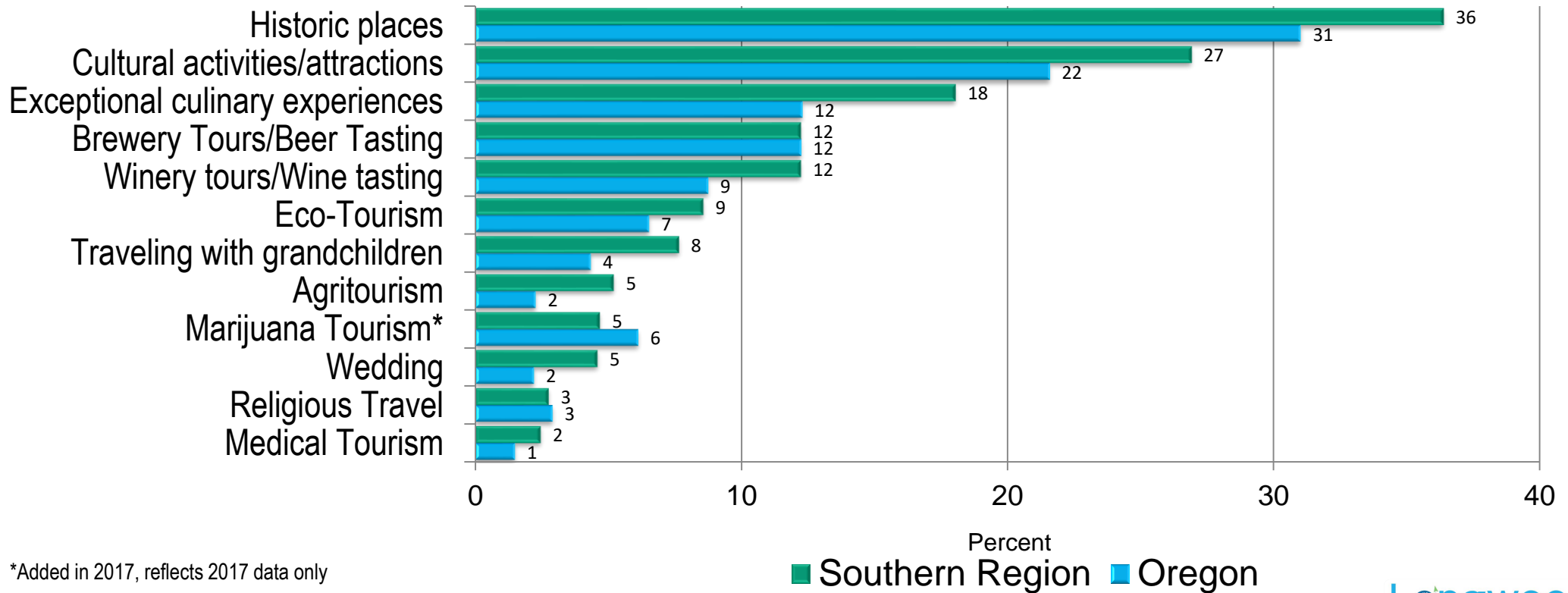


Activities and Experiences (Cont'd)



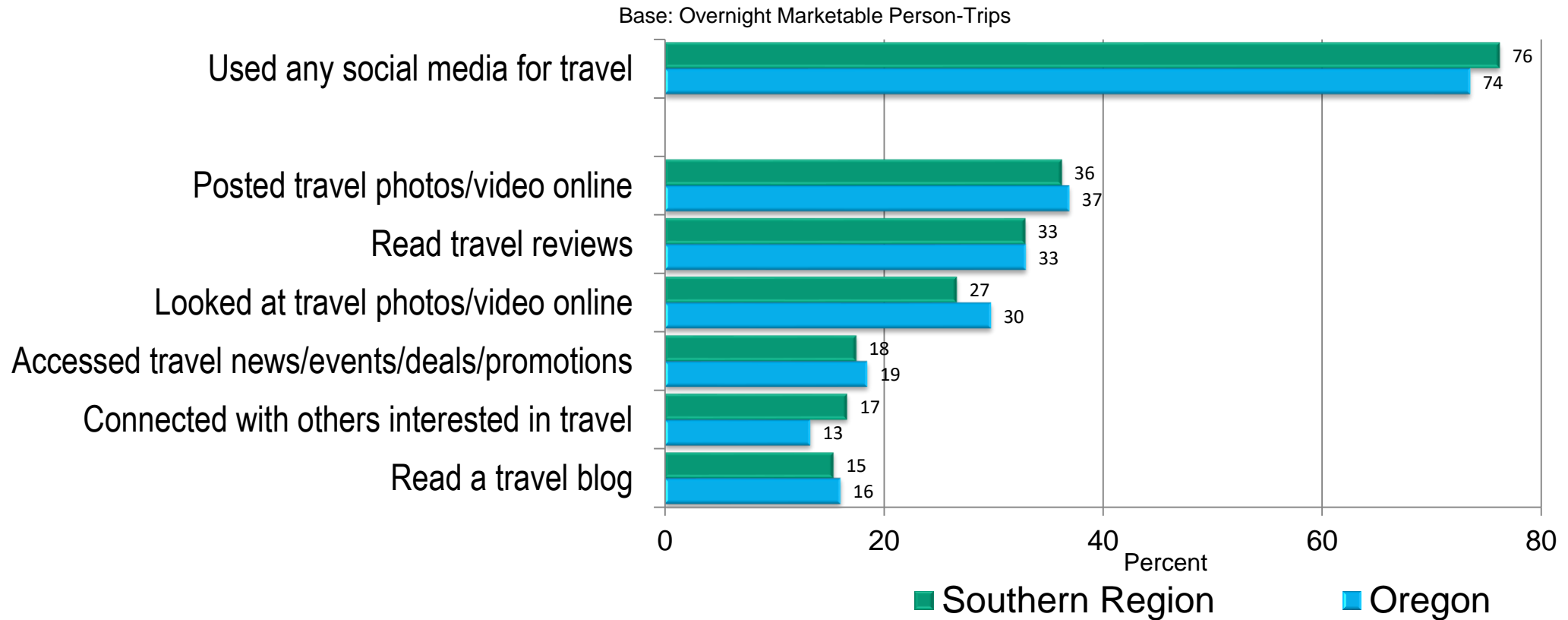
Activities of Special Interest

Base: Overnight Marketable Person-Trips

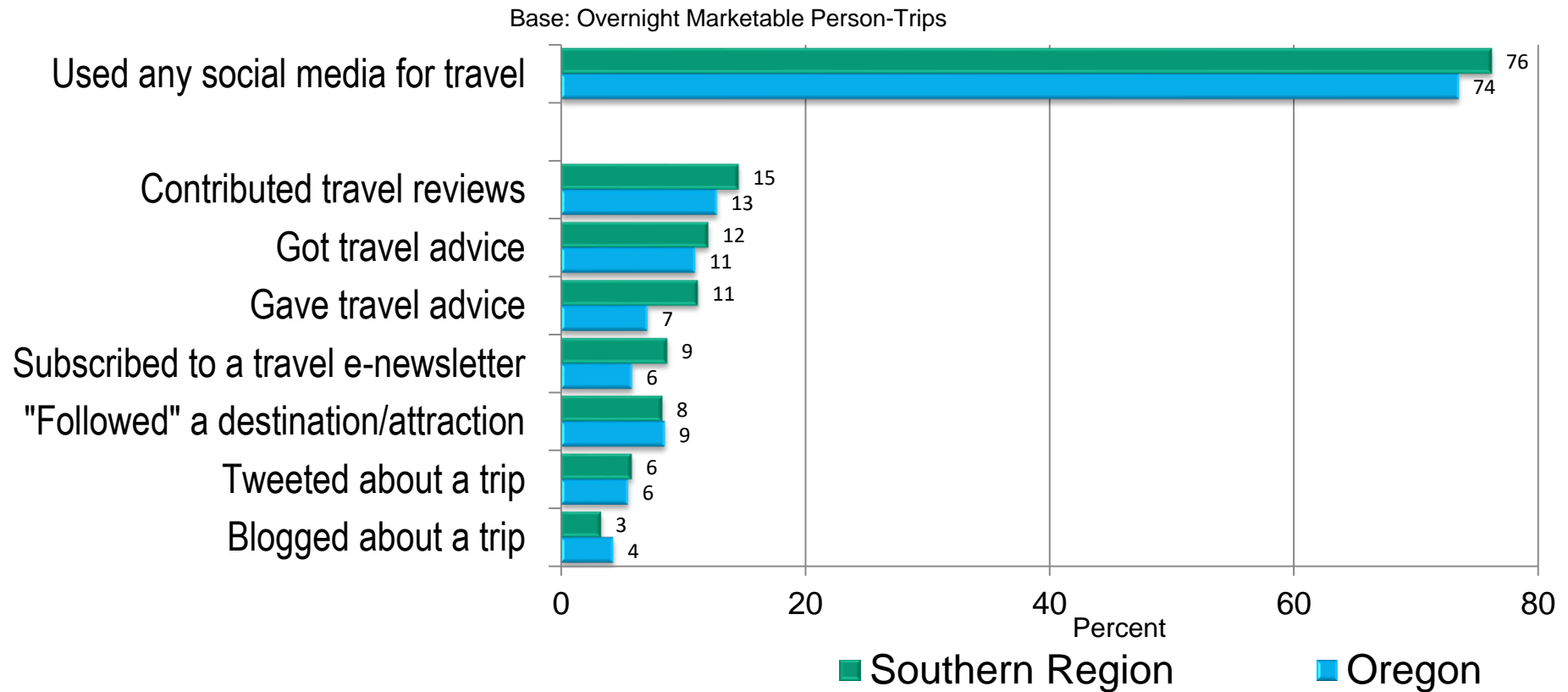


*Added in 2017, reflects 2017 data only

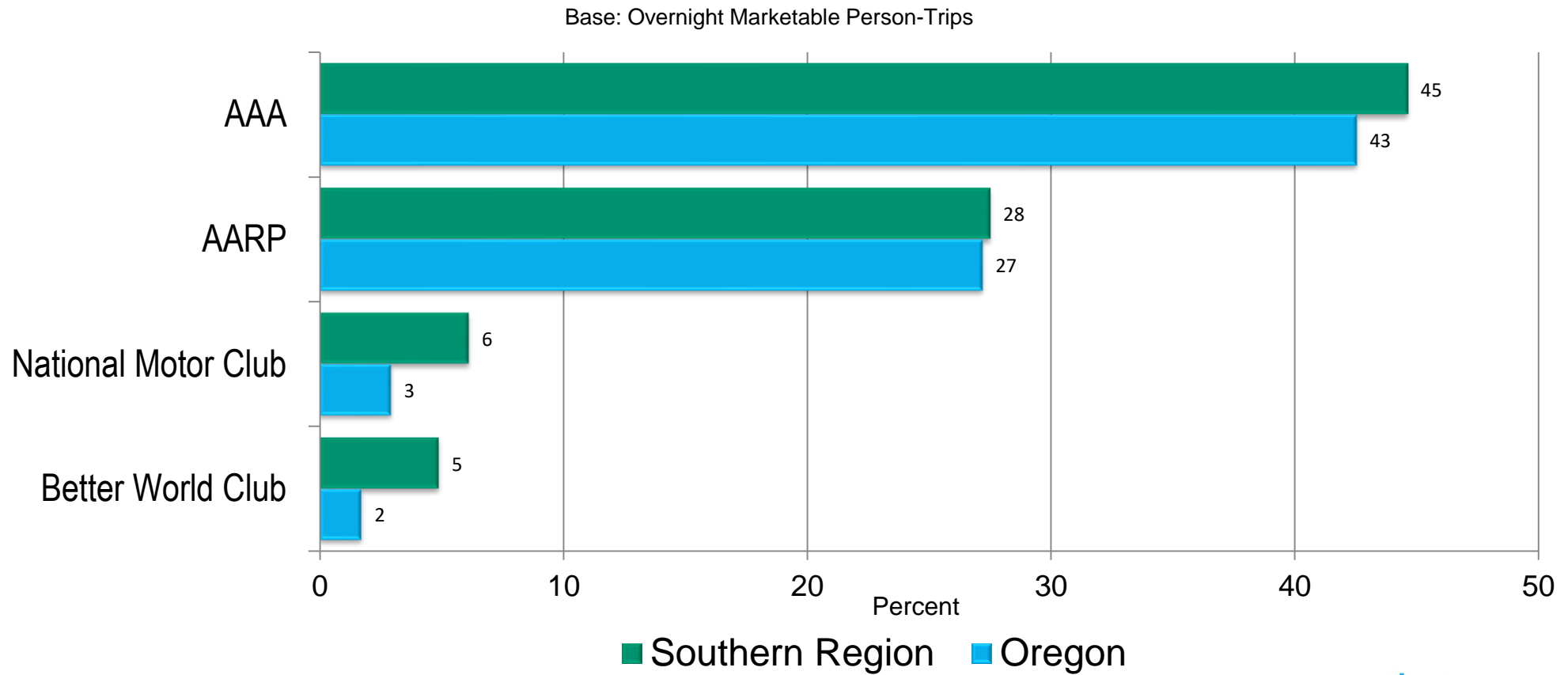
Online Social Media Use by Travelers



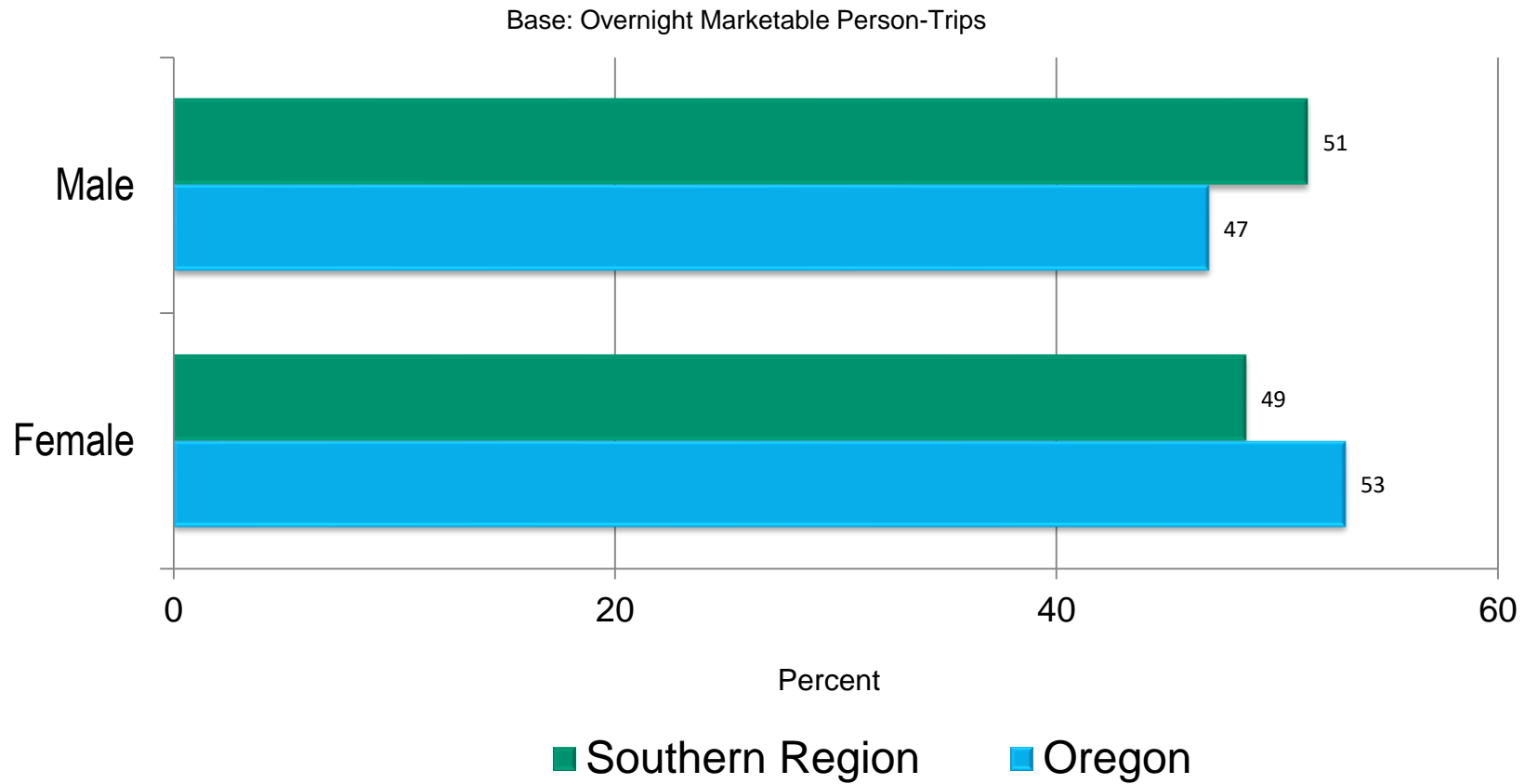
Online Social Media Use by Travelers (Cont'd)



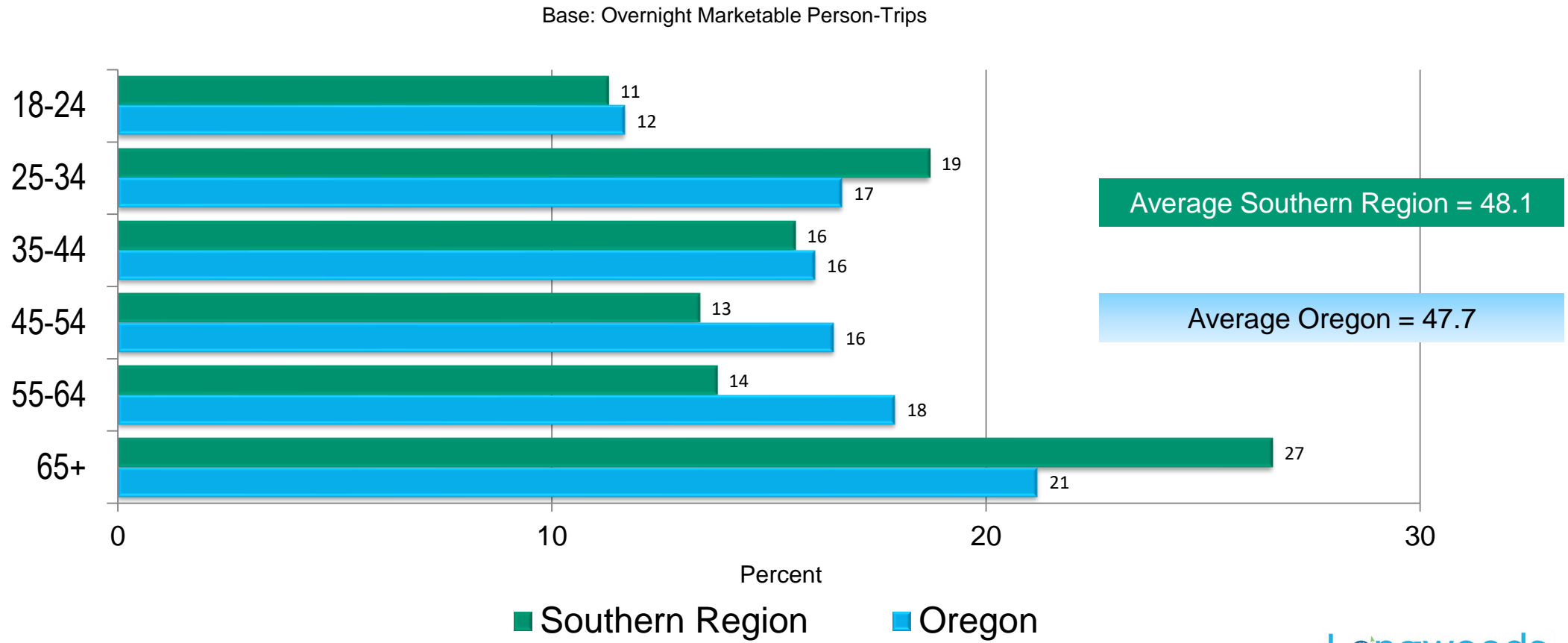
Organization Membership



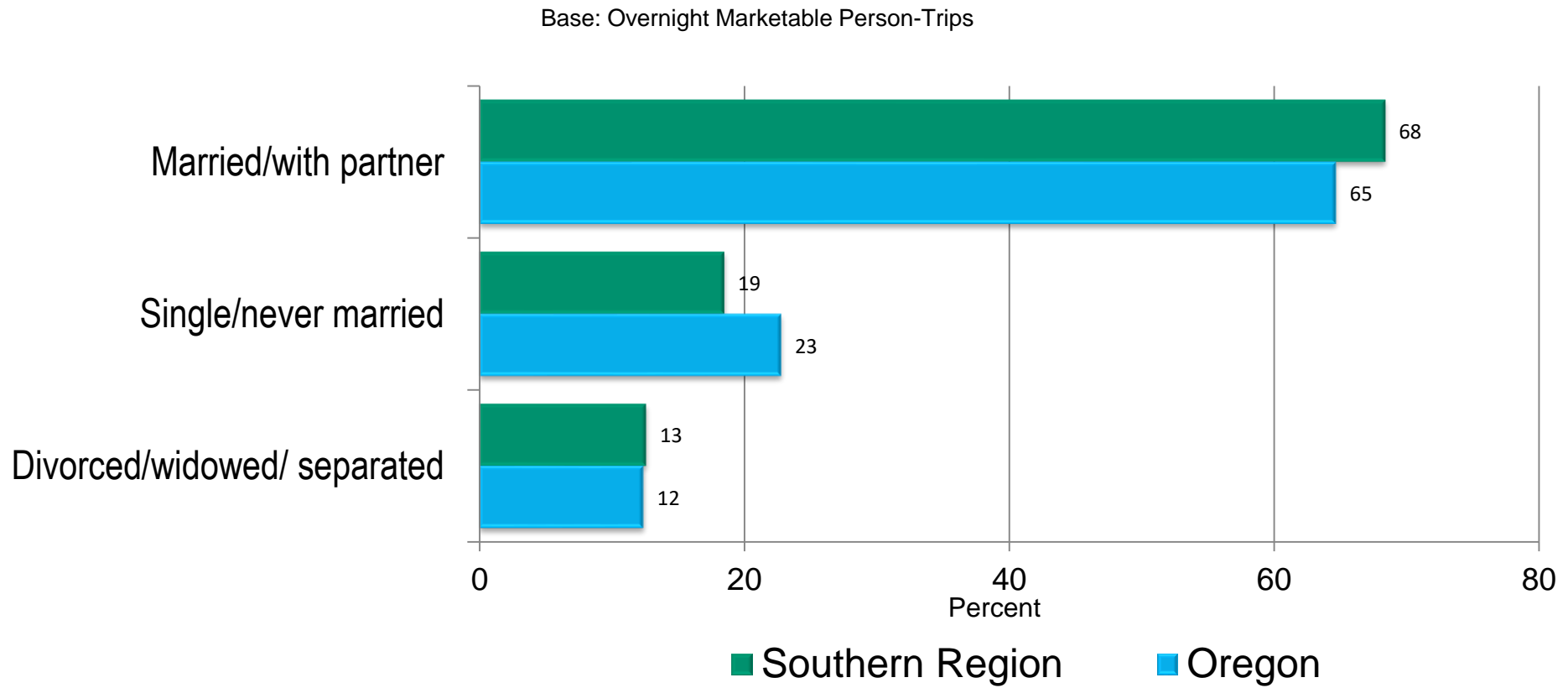
Gender



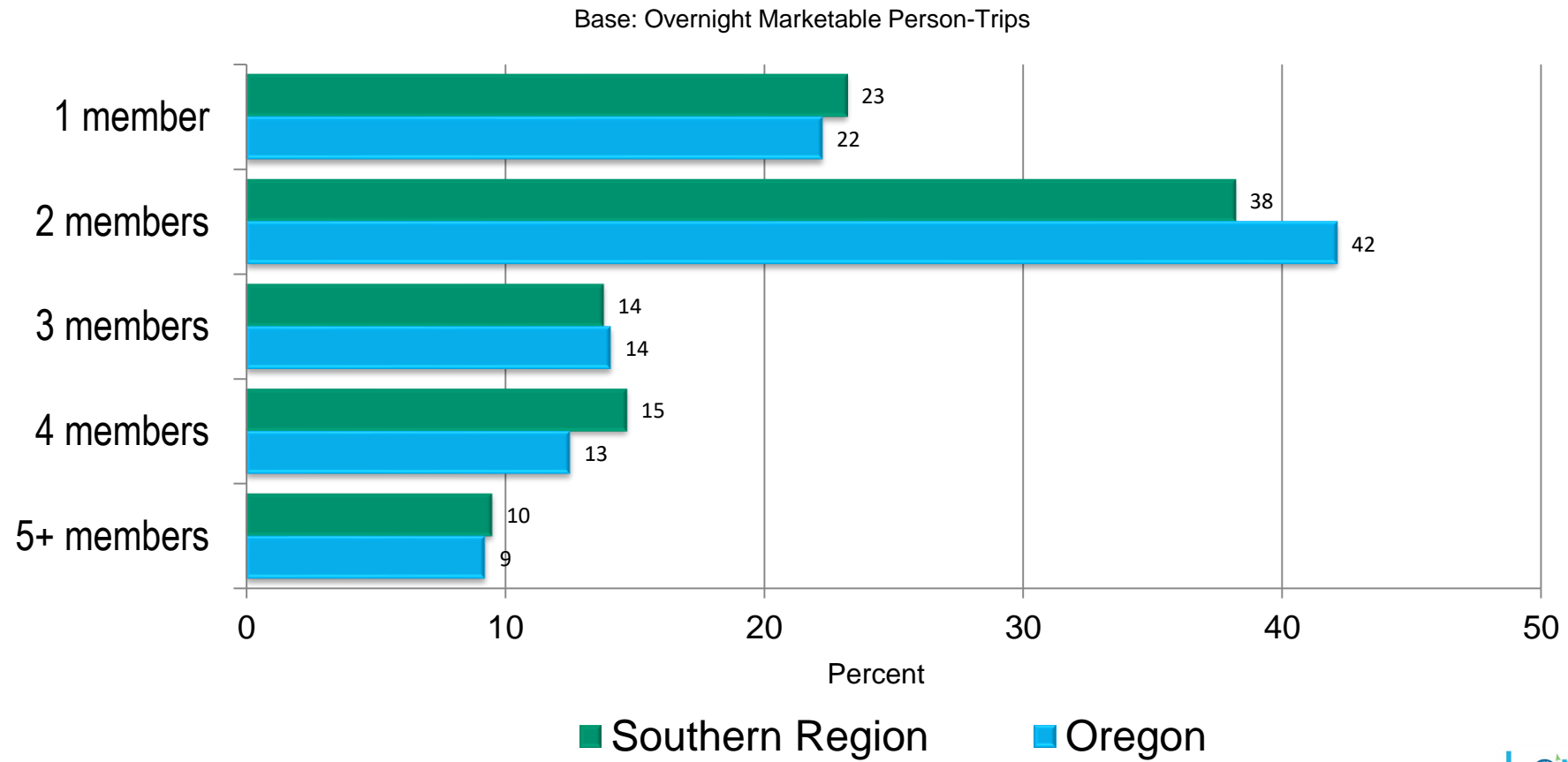
Age



Marital Status

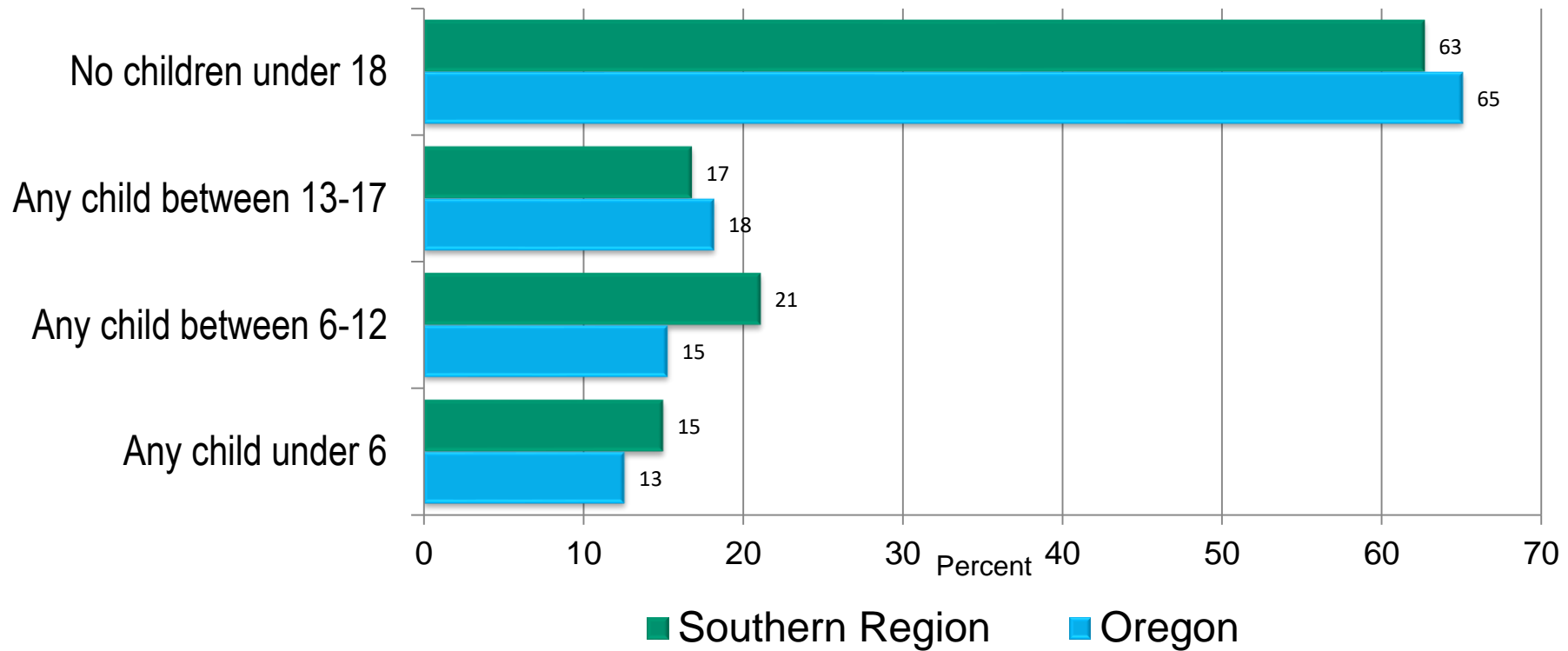


Household Size

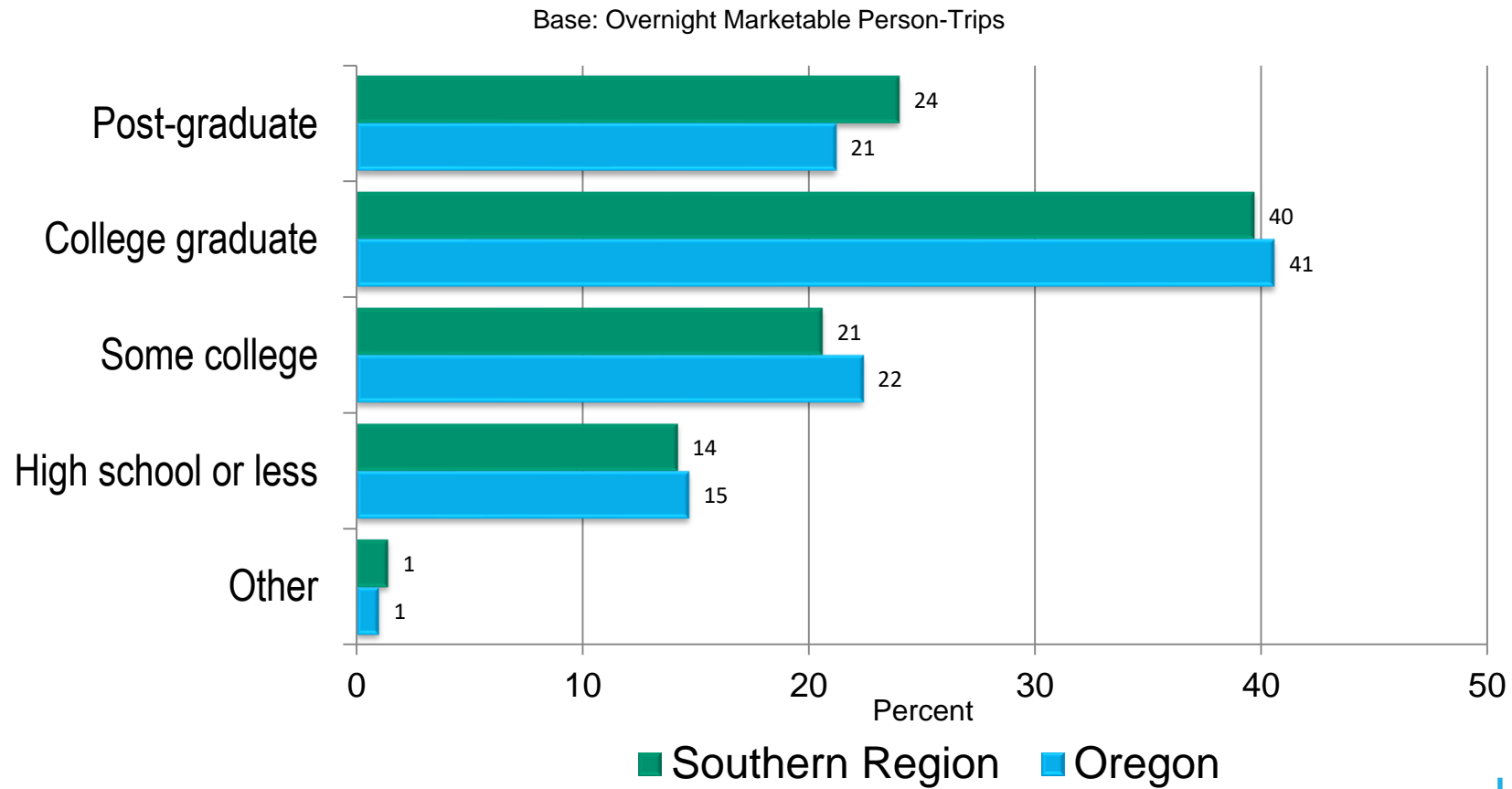


Children in Household

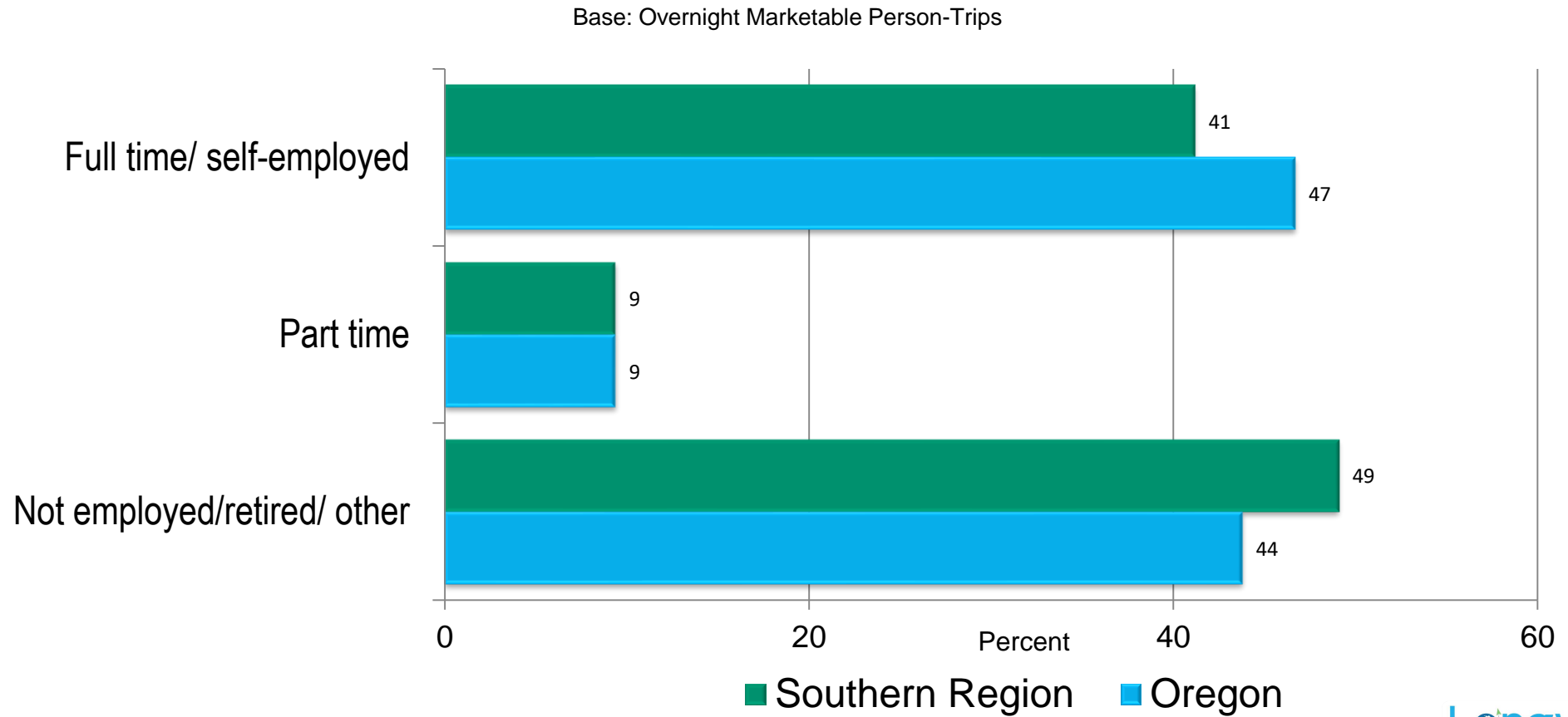
Base: Overnight Marketable Person-Trips



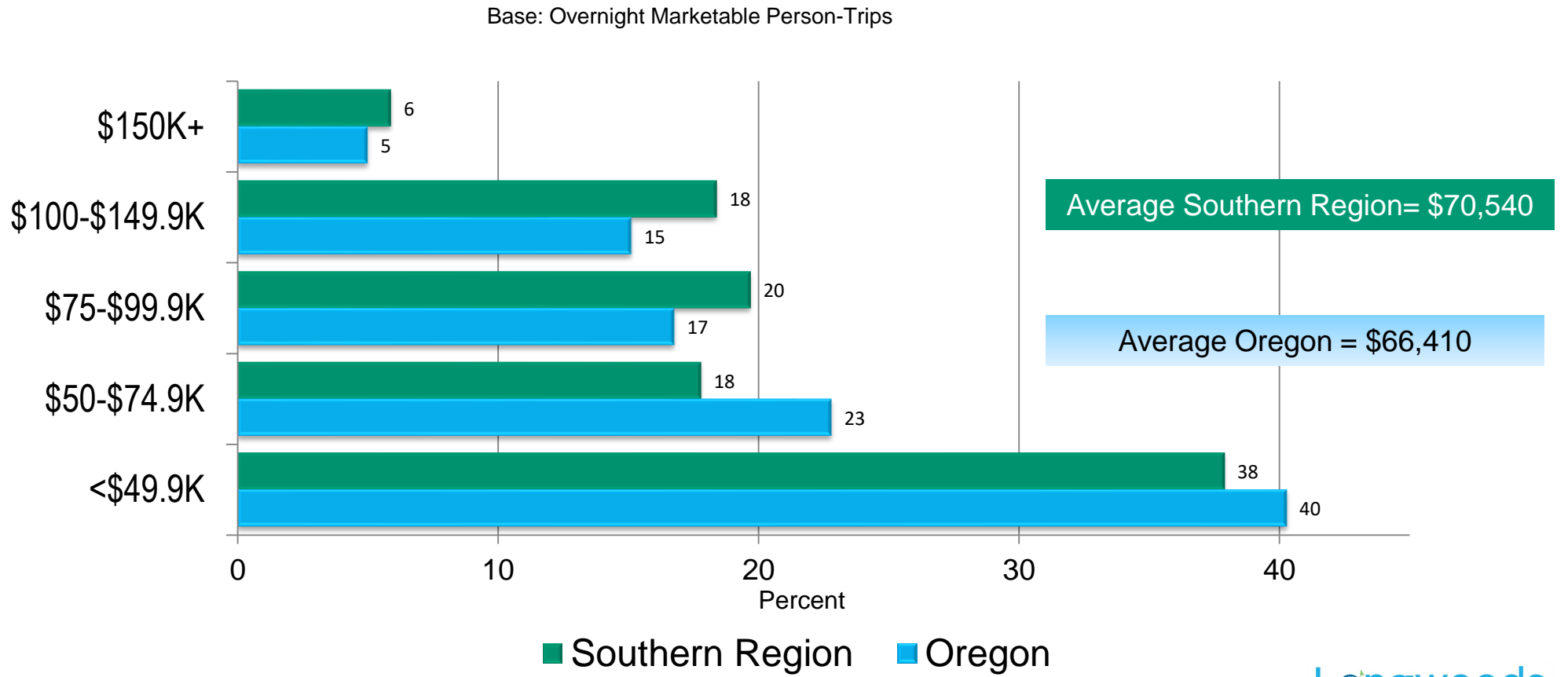
Education



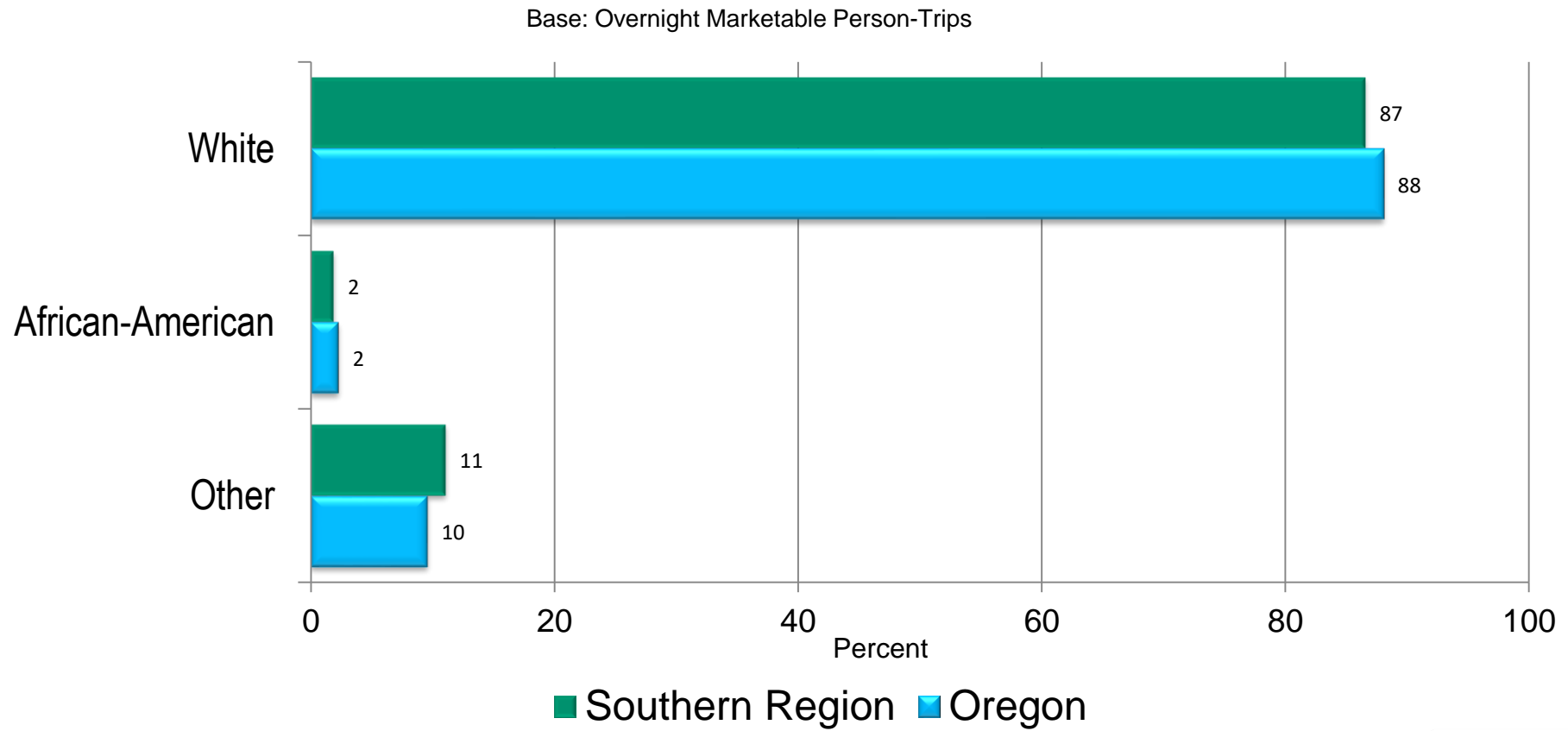
Employment



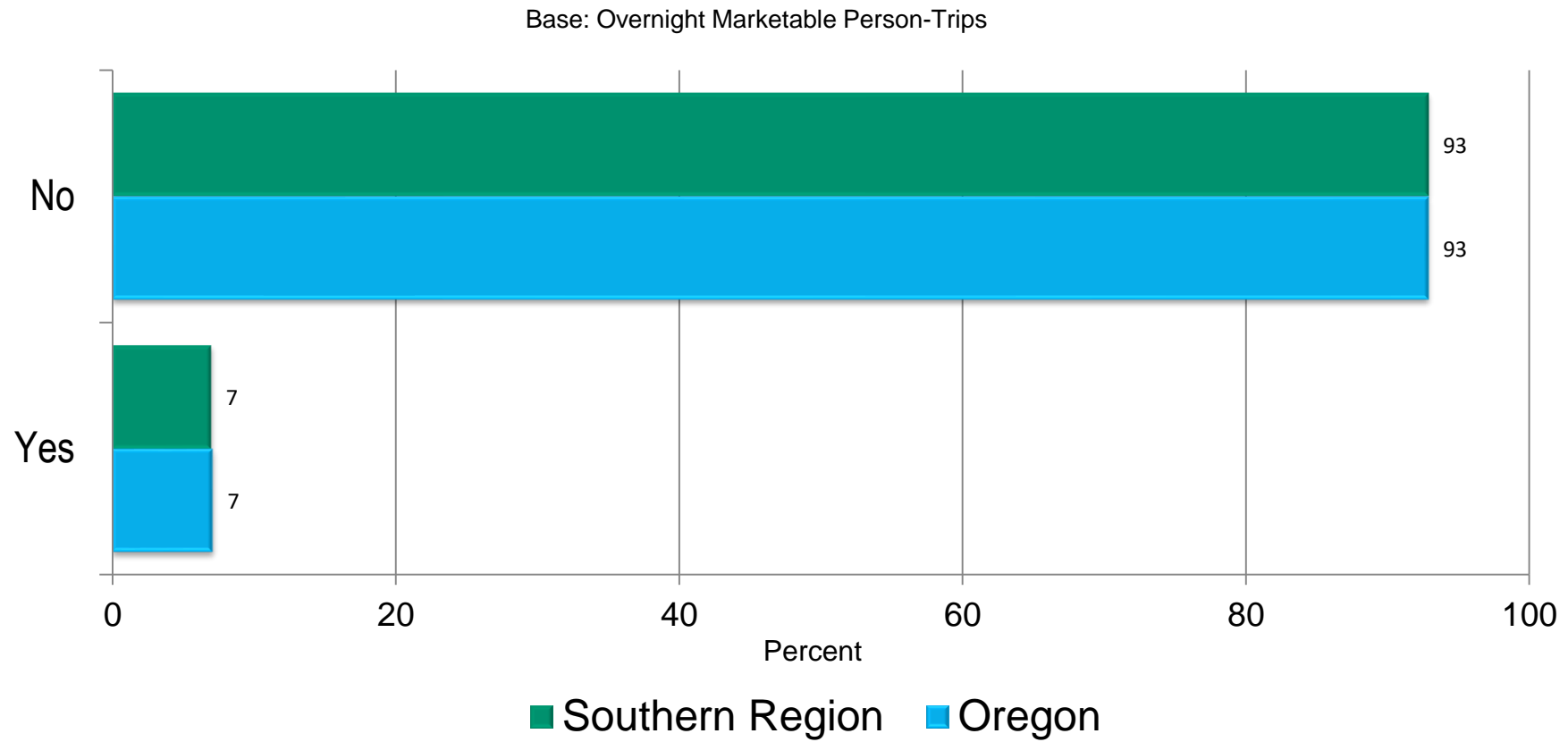
Household Income



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

- **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.

Marketable Trips:

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