

Oregon's International Visitors

Analysis of trip motivations and characteristics



May 2019



Report overview

Tourism Economics has provided Travel Oregon with data on international visitor volume and spending since 2016. This report aims to provide new details on the interests and behavior of international tourists from key markets. Tourism Economics acquired data on all overseas travelers and eleven key markets from the NTTTO (National Travel and Tourism Office). This data examines travelers that visited the Pacific NW (Washington and/or Oregon) from 2012-2017 (sample size on right). This geography and timespan was necessary to gather a large enough sample size for analysis. Additionally this same data was acquired for the US as a whole, so that the Pacific NW responses can be compared to the total US market.

This report will provide details on trip motivation, trip characteristics, trip planning, and demographics for these markets. To conclude, we develop target market indices that will help highlight quality markets to focus future campaign efforts on.

NTTO Sample size for Pacific NW, 2012-2017

Australia	323
Benelux	109
Brazil	108
China	371
France	122
Germany	524
India	267
Japan	504
Nordic Countries	223
Overseas	5,536
South Korea	132
United Kingdom	448

Source: NTTTO

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1) Trip Motivations

Origin markets vary in percentage of leisure travel to the Pacific NW

India has the highest share of business travel (54%) while the Nordic countries have the highest share of VFR (35%).

Asian countries tend to have lower rates of leisure travel, with China, Japan, South Korea, and India all having below average rates of leisure travel.

Australia leads at 58% leisure while India has the lowest share at 14%.

Pacific NW visitation from major markets by trip purpose

Percent of visits

	Leisure	Business	VFR	Other	Total
Overseas	39%	28%	26%	7%	100%
China	33%	30%	21%	17%	100%
Japan	33%	42%	20%	6%	100%
United Kingdom	46%	25%	27%	2%	100%
Germany	52%	23%	20%	5%	100%
Australia	58%	10%	27%	5%	100%
South Korea	36%	22%	33%	9%	100%
Nordic Countries	37%	23%	35%	5%	100%
Benelux	54%	26%	19%	1%	100%
France	42%	30%	22%	5%	100%
India	14%	54%	30%	1%	100%
Brazil	32%	21%	27%	20%	100%

Source: Tourism Economics; NTTO

Quantifying travel motivations can improve the understanding of the actionable market size

Leisure travelers may be easier to attract than business or VFR travelers.

While China and Japan have approximately double the total visitors of Germany and Australia, the leisure markets are much closer in size, for instance Japan has only 31% more leisure visitors than Australia.

Conversely, while France's total market is only slightly larger than India's, France produces four times the number of leisure travelers.

Oregon visitation from major markets by trip purpose, 2018

Visits, 000's

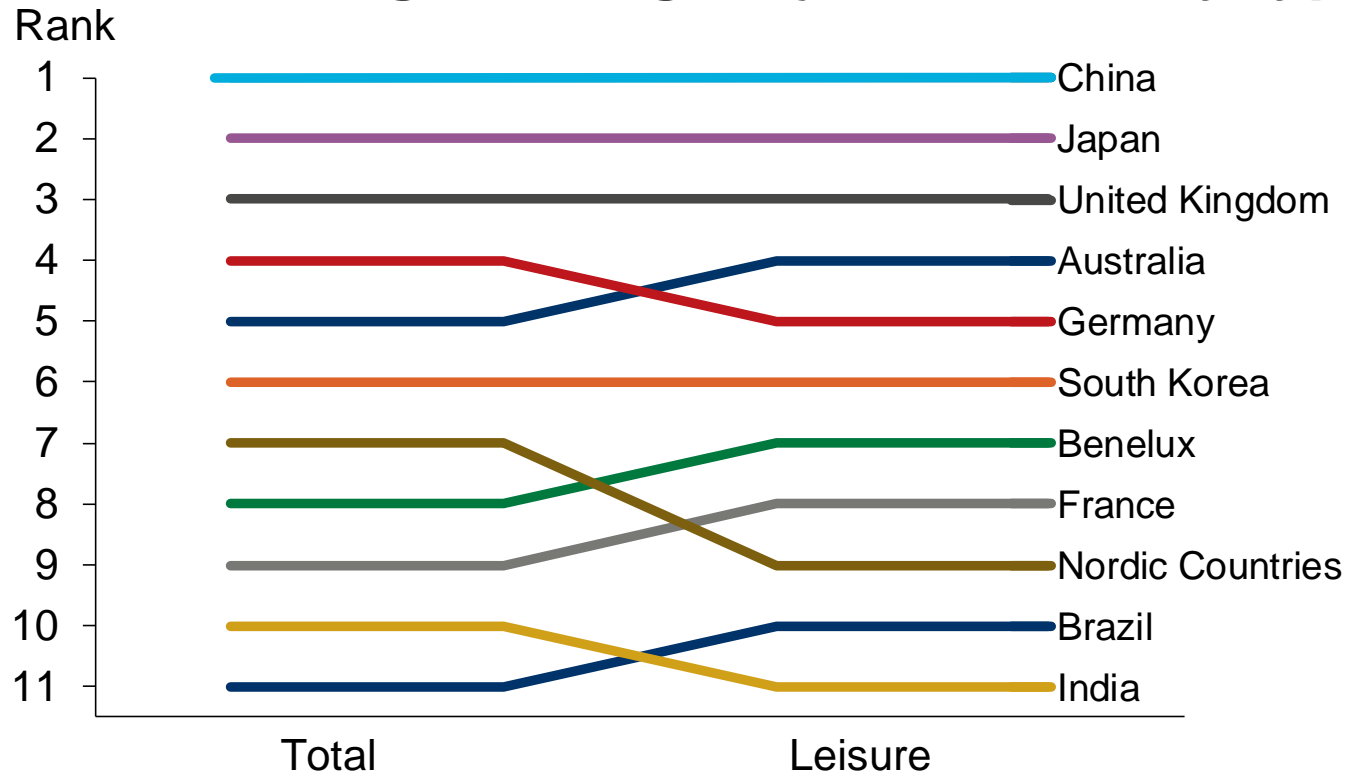
	Leisure	Business	VFR	Other	Total
Overseas	194.8	140.7	129.2	36.0	500.7
China	23.5	21.4	14.6	11.9	71.3
Japan	23.1	29.0	14.0	3.8	69.9
United Kingdom	21.2	11.2	12.5	0.9	45.8
Germany	17.3	7.6	6.6	1.8	33.3
Australia	17.6	2.9	8.2	1.5	30.2
South Korea	7.6	4.7	6.9	1.9	21.1
Nordic Countries	5.5	3.4	5.2	0.8	14.9
Benelux	7.5	3.6	2.7	0.1	13.8
France	5.6	4.0	3.0	0.7	13.3
India	1.4	5.4	3.0	0.1	10.0
Brazil	2.6	1.7	2.2	1.6	8.1

Source: Tourism Economics; NTTO

Market size ranking differ in terms of total and leisure travelers

Australia, Benelux, France, and Brazil all rise in the leisure rankings.

Visits rankings among major markets by type



Additional details on travel motivations

Purpose of trip for origin markets, Pacific NW vs. the US

	Australia	Brazil	France	Germany	India	Japan	South Korea	China	United Kingdom	Benelux	Nordic Countries	Overseas
Oregon												
Leisure	58.1%	32.1%	42.2%	52.0%	14.2%	33.0%	36.0%	32.9%	46.4%	54.1%	36.7%	38.9%
Business	9.6%	20.5%	30.3%	22.8%	54.0%	41.5%	22.2%	30.0%	24.5%	26.0%	23.1%	28.1%
VFR	27.2%	27.4%	22.4%	19.9%	30.4%	20.1%	32.6%	20.5%	27.2%	19.4%	35.0%	25.8%
Other	5.1%	20.0%	5.1%	5.3%	1.3%	5.5%	9.2%	16.7%	2.0%	0.6%	5.3%	7.2%
The US												
Leisure	72.2%	74.0%	61.0%	58.3%	14.1%	71.0%	67.4%	34.6%	66.4%	54.3%	60.1%	58.6%
Business	10.6%	10.7%	18.3%	19.4%	48.6%	18.1%	15.1%	24.5%	13.2%	23.7%	18.6%	17.9%
VFR	15.0%	9.8%	16.9%	18.3%	30.9%	8.4%	11.5%	23.9%	18.5%	18.3%	17.5%	18.4%
Other	2.2%	5.5%	3.9%	3.9%	6.5%	2.4%	6.0%	16.9%	1.9%	3.8%	3.7%	5.2%
Oregon Index (USA=100)												
Leisure	80	43	69	89	101	46	53	95	70	100	61	66
Business	91	192	166	118	111	229	147	122	186	110	124	157
VFR	181	280	133	109	98	239	283	86	147	106	200	140
Other	232	364	131	136	20	229	153	99	105	16	143	138

Source: NTTO

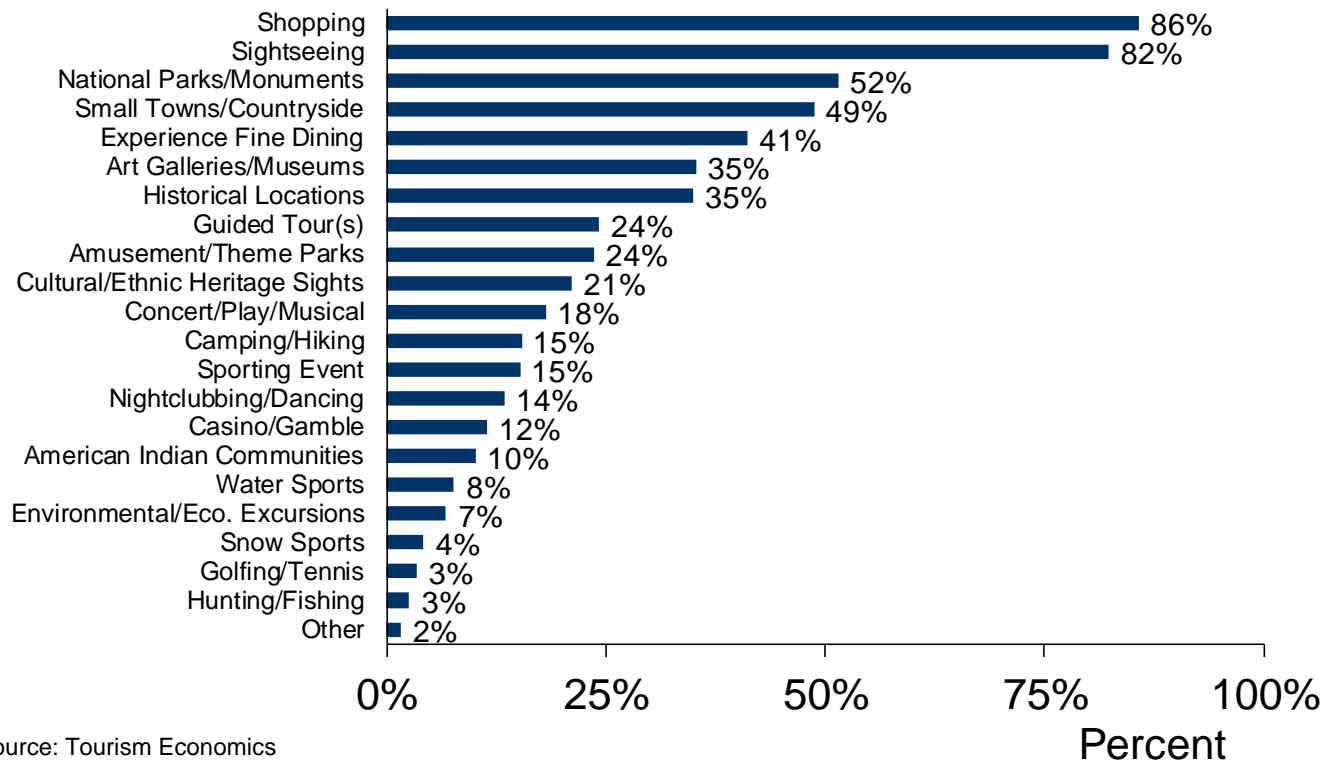
- The Pacific NW has a low percentage of leisure travel compared to the US. This is true for the majority of states in the US as a few very popular states (CA, NY, FL, HI, and NV) have higher leisure travel rates
- Compared to the USA, leisure travel from Brazil, Japan, and South Korea is particularly low
- India has high business and low leisure travel across the US, not just in the Pacific NW
- Leisure travel rates to the Pacific NW from Germany, India, China, and Benelux are similar to the US rates

2) Trip Characteristics

Activities of international visitors (1 of 4)

Shopping and sightseeing lead all activities in participation rates.

Activity participation by overseas visitors to the Pacific Northwest



Source: Tourism Economics

Activities of international visitors (2 of 4)

Full breakdown of activity participation by origin market

Activity participation by international tourists to the Pacific Northwest

Percent participation

Australians participate in many activities. Indians and Japanese tend to participate in few activities, but this may be due to high percentages of business and VFR travel.

		Australia	Brazil	France	Germany	India	Japan	South Korea	China	United Kingdom	Benelux	Nordic Countries	Overseas
History/Culture	American Indian Communities	22%	1%	7%	13%	9%	5%	8%	8%	12%	18%	8%	10%
	Art Galleries/Museums	52%	47%	40%	34%	24%	26%	26%	38%	36%	44%	34%	35%
	Guided Tour(s)	51%	18%	12%	25%	17%	14%	7%	20%	41%	26%	27%	24%
	Historical Locations	57%	34%	38%	46%	16%	21%	21%	27%	43%	50%	39%	35%
	Cultural/Ethnic Heritage Sights	37%	15%	14%	28%	5%	11%	17%	21%	26%	23%	16%	21%
Sports/Outdoors	Camping/Hiking	22%	3%	24%	30%	8%	4%	14%	11%	16%	14%	15%	15%
	Environmental/Eco. Excursions	11%	13%	3%	9%	3%	3%	2%	9%	8%	2%	4%	7%
	Golfing/Tennis	6%	5%	5%	2%	2%	4%	7%	3%	3%	-	5%	3%
	Hunting/Fishing	2%	2%	1%	2%	-	2%	7%	2%	2%	1%	2%	3%
	National Parks/Monuments	75%	48%	61%	61%	26%	30%	46%	50%	58%	67%	49%	52%
	Snow Sports	8%	3%	2%	3%	5%	1%	2%	2%	5%	1%	5%	4%
	Sporting Event	31%	18%	12%	17%	6%	16%	7%	12%	17%	11%	14%	15%
Water Sports	9%	4%	15%	13%	6%	3%	2%	10%	8%	7%	10%	8%	
Urban recreation	Amusement/Theme Parks	29%	36%	12%	16%	25%	15%	20%	35%	12%	18%	23%	24%
	Casino/Gamble	25%	7%	4%	13%	12%	9%	7%	11%	10%	25%	9%	12%
	Concert/Play/Musical	34%	32%	18%	15%	18%	17%	25%	10%	18%	22%	16%	18%
	Experience Fine Dining	44%	29%	39%	40%	30%	23%	38%	56%	47%	36%	38%	41%
	Nightclubbing/Dancing	25%	37%	16%	15%	11%	3%	5%	6%	15%	25%	19%	14%
Unknown/other	Shopping	93%	90%	83%	85%	80%	81%	79%	89%	86%	85%	87%	86%
	Sightseeing	95%	81%	78%	80%	77%	74%	79%	83%	88%	89%	75%	82%
	Small Towns/Countryside	68%	35%	45%	62%	27%	22%	32%	45%	62%	55%	56%	49%
	Other	2%	0%	1%	1%	1%	3%	1%	1%	3%	2%	1%	2%
Sums		Australia	Brazil	France	Germany	India	Japan	South Korea	China	ited Kingdc	Benelux	rdic Countr	Overseas
	History/Culture	220%	113%	111%	147%	71%	77%	78%	115%	158%	161%	123%	126%
	Sports/Outdoors	163%	94%	122%	138%	56%	63%	86%	99%	117%	102%	103%	107%
	Urban recreation	250%	231%	171%	183%	174%	147%	174%	205%	188%	210%	191%	194%
Unknown/other	165%	116%	124%	143%	105%	99%	112%	130%	153%	146%	133%	133%	

Source: Tourism Economics; NTTO

Notes: Shading based on values within activity; the activities were assigned into categories by Tourism Economics

Activities of international visitors (3 of 4)

Indexed breakdown of activity participation by origin market

Activity participation by international tourists to the Pacific Northwest, indexed

Indexed (overseas = 100)

		Australia	Brazil	France	Germany	India	Japan	South Korea	China	United Kingdom	Benelux	Nordic Countries	Overseas
History/Culture	American Indian Communities	214	6	67	126	86	53	76	82	119	174	78	100
	Art Galleries/Museums	148	132	114	97	68	73	72	108	103	123	95	100
	Guided Tour(s)	212	72	49	102	72	59	27	84	167	106	110	100
	Historical Locations	163	96	109	133	46	60	61	78	123	144	113	100
	Cultural/Ethnic Heritage Sights	175	70	65	133	23	50	80	100	121	110	73	100
Sports/Outdoors	Camping/Hiking	142	17	156	195	51	27	91	70	103	91	100	100
	Environmental/Eco. Excursions	157	184	40	129	46	41	26	131	110	24	56	100
	Golfing/Tennis	162	153	141	56	68	118	194	76	88	--	132	100
	Hunting/Fishing	73	73	35	92	--	69	254	92	81	35	69	100
	National Parks/Monuments	145	93	118	119	50	58	90	98	113	130	94	100
	Snow Sports	198	64	45	67	129	33	57	43	126	17	112	100
	Sporting Event	204	116	76	114	38	104	43	78	111	73	92	100
Urban recreation	Water Sports	118	45	192	173	74	44	25	134	108	87	131	100
	Amusement/Theme Parks	124	151	49	67	104	61	85	146	50	77	95	100
	Casino/Gamble	216	62	38	115	100	77	58	94	87	214	80	100
	Concert/Play/Musical	186	178	99	80	98	92	138	55	100	118	88	100
	Experience Fine Dining	106	70	95	96	72	56	92	135	114	86	92	100
	Nightclubbing/Dancing	186	276	115	112	83	20	39	42	110	186	137	100
Unknown/other	Shopping	109	105	96	99	93	95	92	104	101	99	102	100
	Sightseeing	116	98	95	97	93	90	96	101	106	109	91	100
	Small Towns/Countryside	140	72	93	128	55	45	66	93	128	112	115	100
	Other	138	6	63	69	88	163	63	75	188	100	88	100
Total		Australia	Brazil	France	Germany	India	Japan	South Korea	China	United Kingdom	Benelux	Nordic Countries	Overseas
	History/Culture	174	90	88	116	56	61	62	91	125	127	98	100
	Sports/Outdoors	153	88	114	129	52	59	81	93	110	96	96	100
	Urban recreation	129	119	88	94	90	76	90	106	97	108	99	100
Unknown/other	125	88	94	108	79	74	84	98	115	110	100	100	

Source: Tourism Economics; NTT

Notes: Shading based on values within activity; the activities were assigned into categories by Tourism Economics

Activities of international visitors (4 of 4)

Simplifying the analysis reveals patterns.

- Australians are particularly interested in historical and cultural activities.
- High rates of business and VFR travel results in Asian countries having low indexed scores.
- Asian countries generally prefer urban activities.
- Western countries prefer history/cultural and sports/outdoors activities.

Activity Participation by major markets in the Pacific NW

Index (overseas = 100)

	Australia	Benelux	Brazil	China	France	Germany	India	Japan	Nordic Countries	South Korea	United Kingdom	Overseas
History/Culture	174	127	90	91	88	116	56	61	98	62	125	100
Sports/Outdoors	153	96	88	93	114	129	52	59	96	81	110	100
Urban recreation	129	108	119	106	88	94	90	76	99	90	97	100
Unknown/other	125	110	88	98	94	108	79	74	100	84	115	100

Sources: Tourism Economics; NTTO

Length of stay and hotel use (1 of 2)

On average, 63% overseas visitors to the Pacific NW stay in hotels

Hotel stays and total length of stay from major markets in the Pacific NW

	Australia	France	Germany	India	Japan	South Korea	China	United Kingdom	Benelux	Nordic Countries	Overseas
Hotel Stays											
Percent using	64%	56%	65%	56%	83%	65%	56%	65%	67%	65%	63%
Mean # nights	6.0	8.3	5.2	13.5	5.1	4.6	9.0	4.6	5.9	5.1	6.2
Median # nights	4.0	4.0	4.0	7.0	3.0	4.0	6.0	4.0	3.0	4.0	4.0
Total length of Stay*											
1 Night	7%	5%	7%	9%	19%	12%	8%	8%	8%	5%	9%
2-3 Nights	29%	30%	25%	12%	28%	22%	24%	26%	32%	19%	24%
4-7 Nights	34%	36%	34%	28%	28%	30%	30%	32%	31%	34%	33%
8-14 Nights	15%	17%	20%	19%	17%	25%	17%	22%	16%	28%	19%
15-30 Nights	10%	8%	12%	18%	7%	7%	13%	10%	10%	15%	11%
31+ Nights	5%	5%	2%	15%	2%	4%	7%	2%	3%	-	5%
Mean # nights	9.4	9.5	9.8	24.6	7.1	8.3	13.1	8.1	7.7	8.4	10.6
Median # nights	5.0	5.0	5.0	8.0	4.0	6.0	6.0	5.0	5.0	7.0	5.0

Source: Tourism Economics; NTTO

*Note: Length of stay refers to stay in primary destination; coloring based on values within statistic

- Japanese visitors are most likely to stay in hotels, but have short length of stays.
- Conversely, Indians have the longest length of stays, but are among the least likely to use hotels.

Length of stay and hotel use (1 of 2)

Compared to overseas visitor to the US as a whole, overseas visitors to the Pacific NW are less likely to stay in hotels and have shorter stays.

Length of stay and accomodation type in major markets

Index (USA=100)

	Australia	Benelux	Brazil	China	France	Germany	India	Japan	Nordic Countries	South Korea	United Kingdom	Overseas
Hotels												
Percent using	74	82	71	83	71	82	83	89	83	73	82	82
Mean # nights	54	66	59	87	91	60	87	88	64	71	53	71
Median # nights	40	43	50	86	57	57	100	75	67	100	57	67
Private home												
Percent using	119	141	165	91	134	106	96	259	129	266	123	122
Mean # nights	106	90	128	79	78	103	106	116	84	84	98	95
Median # nights	80	143	120	71	88	80	87	125	90	70	100	90
Total												
1 Night	288	262	731	296	294	372	261	2643	170	931	272	433
2-3 Nights	977	274	346	407	370	333	198	99	262	90	334	216
4-7 Nights	194	92	99	110	102	118	120	50	97	64	96	94
8-14 Nights	39	50	48	52	46	53	75	174	82	140	58	61
15-30 Nights	32	63	63	69	60	61	76	203	81	101	66	67
31+ Nights	94	109	256	61	123	55	77	138	--	135	--	96
Mean # nights	65	72	175	63	74	75	90	108	75	100	74	82
Median # nights	42	63	60	60	63	50	67	100	88	120	56	63

Sources: Tourism Economics; NTTO

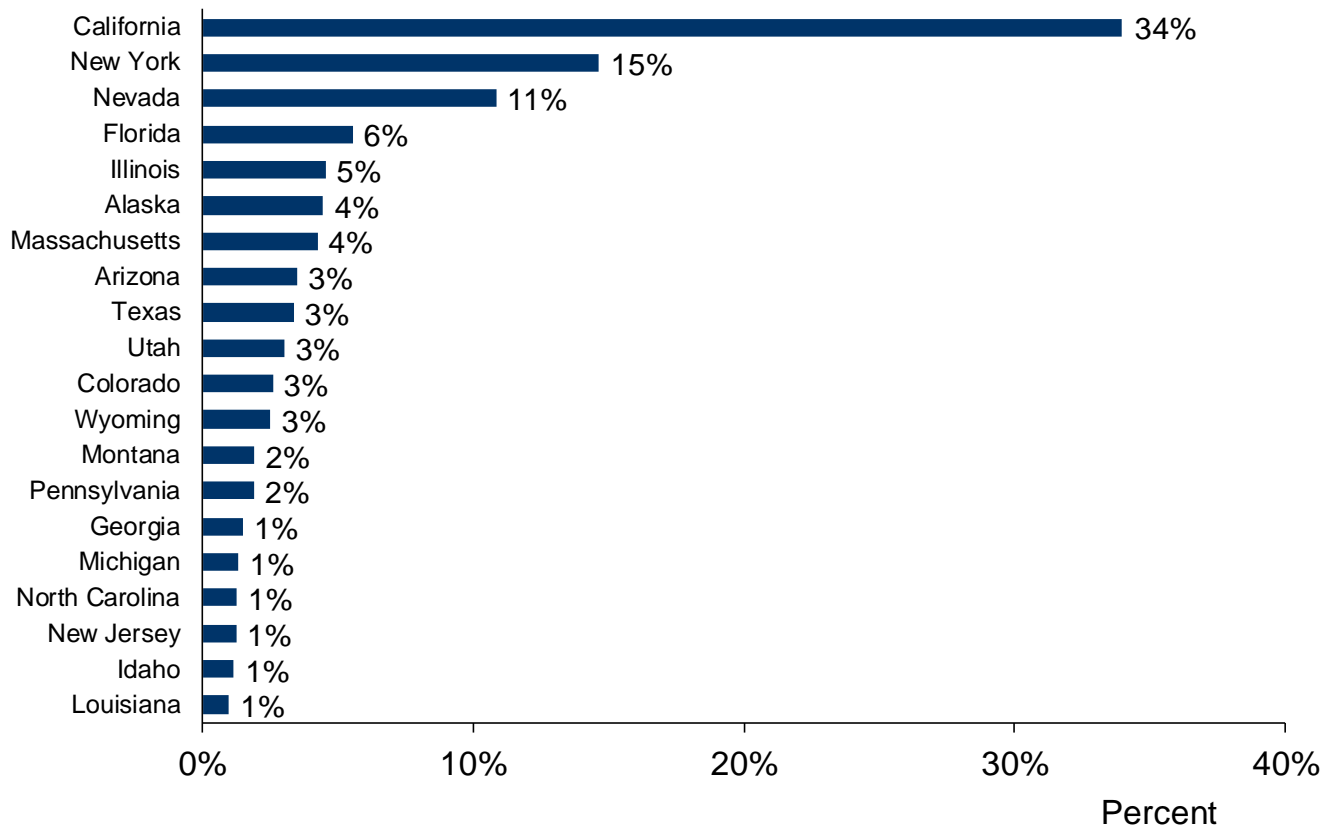
Note: Shading based on values within statistic

- One night stays in the Pacific NW are particularly common compared to the whole US.

Other destinations visited (1 of 3)

Pacific NW visitors also frequently visit California, New York, and Nevada.

Other states visited by Pacific NW overseas visitors



Other destinations visited (2 of 3)

Full breakdown of other states visited.

Other states visited by Pacific NW overseas visitors

Index (Overseas = 100)

	Australia	Benelux	Brazil	China	France	Germany	India	Japan	Nordic Countries	South Korea	United Kingdom	Overseas
California	57.1%	29.8%	22.6%	35.4%	34.3%	37.2%	27.7%	24.9%	36.5%	34.0%	29.6%	34.0%
New York	21.1%	14.6%	20.4%	11.5%	16.2%	9.8%	12.7%	19.1%	11.7%	17.4%	11.0%	14.6%
Nevada	22.7%	17.7%	7.3%	13.4%	7.0%	14.2%	3.3%	3.7%	13.4%	13.2%	8.8%	10.9%
Florida	5.7%	1.5%	18.6%	4.5%	4.4%	3.9%	3.1%	7.3%	4.0%	1.7%	3.6%	5.5%
Dist. of Columbia	7.1%	7.6%	13.0%	3.9%	1.0%	4.3%	6.1%	7.3%	1.8%	4.8%	4.1%	5.2%
Illinois	6.2%	1.2%	2.4%	2.5%	3.4%	3.3%	6.8%	6.9%	2.6%	2.0%	6.3%	4.5%
Alaska	13.8%	0.9%	4.6%	4.3%	2.4%	2.3%	3.3%	0.9%	-	1.0%	10.6%	4.5%
Massachusetts	4.8%	3.2%	4.7%	4.4%	10.9%	3.0%	2.4%	4.2%	1.8%	6.6%	5.2%	4.2%
Arizona	5.5%	5.6%	8.2%	2.4%	1.1%	2.6%	3.2%	1.5%	2.2%	5.5%	5.0%	3.5%
Texas	7.2%	4.7%	2.8%	3.4%	1.9%	2.1%	8.7%	2.5%	1.9%	0.6%	2.0%	3.4%
Utah	1.7%	4.4%	0.7%	5.7%	5.1%	4.7%	1.7%	0.4%	1.4%	0.7%	3.0%	3.0%
Colorado	3.7%	2.7%	-	3.2%	1.9%	5.2%	1.7%	1.2%	2.4%	0.5%	2.7%	2.6%
Wyoming	2.8%	6.3%	0.5%	4.3%	7.8%	3.7%	1.4%	-	2.5%	-	3.7%	2.5%
Montana	3.8%	0.5%	-	2.9%	5.1%	5.1%	-	-	3.0%	-	2.9%	1.9%

Source: NTTO

- 34% of Pacific NW visitors also visit California.
- The list of states largely reflects the most popular states in the US.
- The list is geographically diverse with California, New York, and Florida representing three of the top four states.

Other destinations visited (3 of 3)

Indexed breakdown of other states visited.

Other states visited by Pacific NW overseas visitors

Index (Overseas = 100)

	Australia	Benelux	Brazil	China	France	Germany	India	Japan	Nordic Countries	South Korea	United Kingdom	Overseas
California	168	88	66	104	101	110	82	73	108	100	87	100
New York	144	100	139	78	111	67	87	131	80	119	75	100
Nevada	209	163	67	124	65	131	30	34	124	122	81	100
Florida	104	27	336	82	80	70	56	131	73	31	64	100
Dist. of Columbia	138	147	250	75	18	82	118	141	36	92	79	100
Illinois	137	26	52	54	74	73	150	152	56	44	140	100
Alaska	310	20	103	96	53	51	74	19	0	23	237	100
Massachusetts	113	75	110	103	257	70	57	100	43	156	124	100
Arizona	156	160	236	68	32	75	91	43	62	157	142	100
Texas	213	141	83	101	56	62	260	75	57	17	59	100
Utah	57	146	23	190	170	154	56	12	45	23	99	100
Colorado	143	105	0	126	75	201	64	47	91	19	103	100
Wyoming	113	250	21	173	311	146	57	0	98	0	149	100
Montana	198	28	0	153	267	265	0	0	154	0	153	100

Source: NTTO

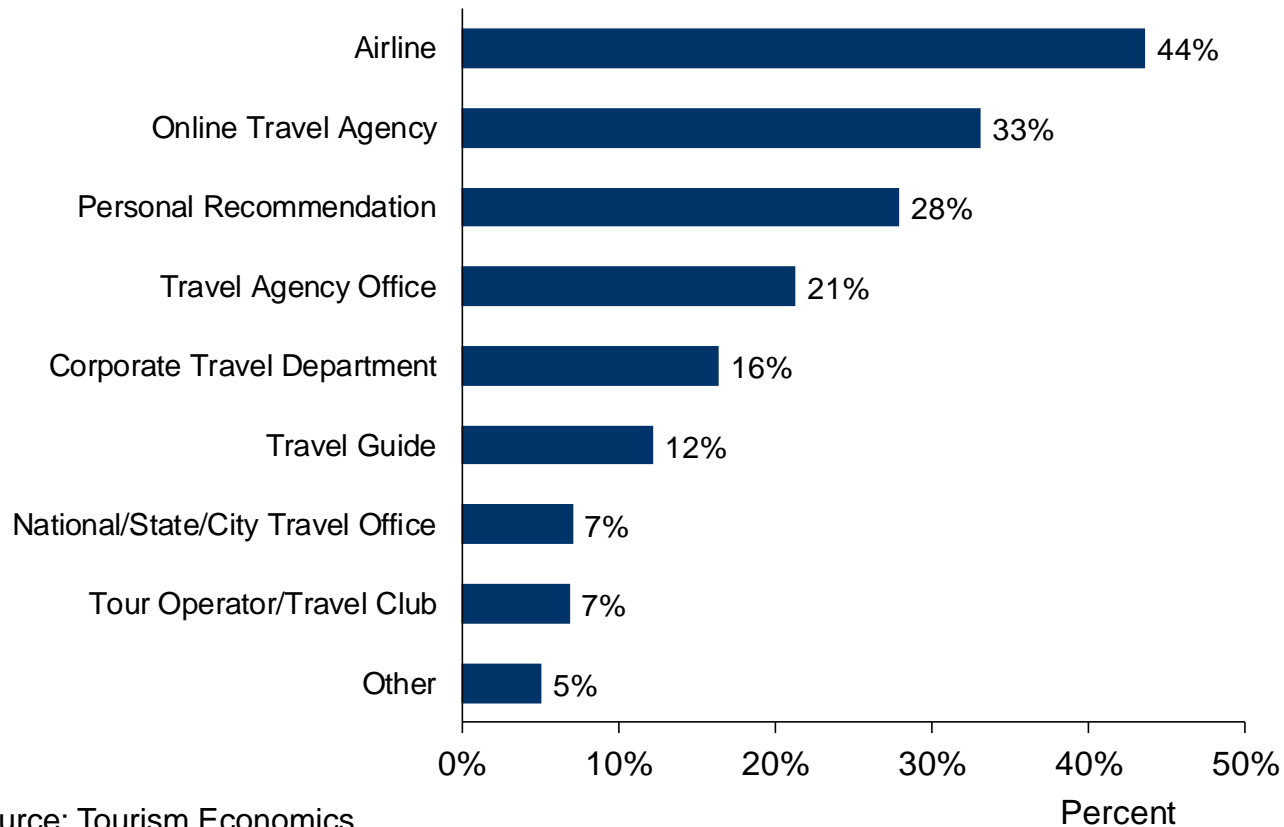
- Nevada is popular with Australians.
- Alaska is popular with Australians and the British.
- Australians visit lots of states, so their indexed numbers are generally high
- Florida is popular with Brazilians.
- Due to high volumes of business and VFR travel, Indian and Japanese travelers tend to visit fewer states, and their indexed numbers are generally low.

3) Trip Planning

Data sources used for planning (1 of 3)

Pacific NW visitors most frequently consult airlines and OTAs for trip planning information.

Data sources used for trip planning by Pacific NW visitors



Source: Tourism Economics

Data sources used for planning (2 of 3)

Full breakdown of trip planning sources.

Data sources used for trip planning by Pacific NW visitors

Percent	Australia	Brazil	France	Germany	India	Japan	South Korea	China	United Kingdom	Benelux	Nordic Countries	Overseas
Airline	44%	48%	53%	45%	38%	48%	32%	36%	50%	50%	47%	44%
Corporate Travel Department	6%	22%	11%	20%	44%	13%	9%	18%	16%	17%	14%	16%
National/State/City Travel Office	5%	23%	11%	10%	5%	3%	1%	5%	6%	7%	4%	7%
Online Travel Agency	36%	22%	23%	36%	22%	25%	37%	33%	38%	42%	46%	33%
Personal Recommendation	35%	40%	25%	25%	24%	14%	34%	28%	25%	20%	25%	28%
Tour Operator/Travel Club	8%	9%	1%	5%	9%	5%	6%	11%	9%	8%	4%	7%
Travel Agency Office	44%	17%	18%	24%	24%	24%	16%	10%	16%	18%	13%	21%
Travel Guide	13%	10%	19%	23%	4%	14%	7%	13%	14%	7%	6%	12%
Other	7%	9%	3%	5%	4%	5%	10%	7%	4%	5%	3%	5%

Source:NTTO

- The most commonly consulted data sources include airlines, OTAs, and word-of-mouth (personal recommendation).
- DMOs are a popular information source for Brazilians.
- Travel agencies are popular with Australians.

Data sources used for planning (3 of 3)

Full breakdown of trip planning sources, indexed to Pacific NW overseas visitors.

Data sources used for trip planning by Pacific NW visitors, indexed

Index (overseas =100)

	Australia	Brazil	France	Germany	India	Japan	South Korea	China	United Kingdom	Benelux	Nordic Countries	Overseas
Airline	102	109	121	103	86	111	73	83	114	116	108	100
Corporate Travel Department	38	137	70	124	268	78	52	112	95	101	84	100
National/State/City Travel Office	76	318	155	135	69	44	17	72	85	94	55	100
Online Travel Agency	109	66	68	108	67	77	112	99	115	126	137	100
Personal Recommendation	126	143	89	88	85	51	123	101	90	72	90	100
Tour Operator/Travel Club	109	130	14	77	129	68	93	159	133	119	59	100
Travel Agency Office	205	80	83	115	113	113	73	46	73	83	59	100
Travel Guide	102	80	152	187	32	111	57	108	112	61	51	100
Other	137	173	53	98	84	94	204	129	71	96	51	100

Source:NTTO

Trip planning timeline

Full breakdown of trip planning timeline – how many days before departure was the decision to travel made.

Number of days before departure trip planning decision was made by visitors to the Pacific NW

- Australians make the trip decision the farthest from the travel date.
- Indians make the trip decision the closest to the travel date.
- These results are likely impacted by the percent of business travel from the different origin markets.

	Percent												
	Australia	Brazil	France	Germany	India	Japan	South Korea	China	United Kingdom	Benelux	Nordic Countries	Overseas	
0-14 days	5%	9%	8%	11%	22%	13%	11%	13%	12%	14%	10%	12%	
15-60 days	19%	30%	40%	30%	52%	41%	45%	49%	27%	36%	26%	39%	
61-120 days	25%	35%	22%	24%	21%	29%	16%	27%	25%	21%	32%	24%	
121-180 days	21%	12%	11%	14%	5%	13%	24%	9%	14%	14%	15%	13%	
181 or more days	30%	15%	19%	22%	1%	4%	5%	2%	22%	16%	17%	12%	
Mean No. of Days	166	117	112	119	50	79	89	66	126	105	122	97	
Median No. of Days	150	90	90	90	30	60	60	60	90	80	90	60	

Source:NTTO

	Index (Overseas =100)												
	Australia	Brazil	France	Germany	India	Japan	South Korea	China	United Kingdom	Benelux	Nordic Countries	Overseas	
0-14 days	39	73	64	90	175	106	92	105	98	110	80	100	
15-60 days	48	76	103	77	133	106	116	127	69	92	68	100	
61-120 days	105	144	93	99	88	121	65	113	105	88	133	100	
121-180 days	163	90	82	105	37	96	180	66	105	105	114	100	
181 or more days	253	128	163	182	8	34	38	16	186	132	145	100	
Mean No. of Days	170	120	115	122	51	81	91	68	130	108	125	100	
Median No. of Days	250	150	150	150	50	100	100	100	150	133	150	100	

Source:NTTO

4) Demographic Data

Demographic data (1 of 2)

- The Nordic Countries, Germany and Japan have the wealthiest visitors.
- China, South Korea, and Benelux have the least wealthy visitors.
- The average age does not vary greatly, all 11 markets average between 35 and 45 years of age.
- Most origin markets have 79% or greater repeat US visitors, only South Korea, India, and Benelux have repeat visitor rates lower than 79%.
- 58% of all visitors are male, high rates of business travel likely drive the higher percentage of males from India and Japan.

Visitors from developed countries tend to be richer and older.

Demographic data on visitors to the Pacific NW

	Mean Annual Income	Percent \$100k HHs	Average age	Repeat US visitor	Percent male
Overseas	\$91,000	34%	41	79%	58%
China	\$74,000	25%	35	79%	54%
Japan	\$112,000	44%	45	81%	72%
United Kingdom	\$102,000	37%	44	89%	52%
Germany	\$114,000	49%	43	83%	58%
Australia	\$103,000	38%	43	88%	45%
South Korea	\$70,000	25%	35	66%	50%
Nordic Countries	\$117,000	60%	40	90%	57%
Benelux	\$65,000	23%	42	84%	52%
France	\$84,000	42%	39	83%	54%
India	\$76,000	24%	42	63%	80%
Brazil	\$81,000	31%	39	63%	58%

Source: Tourism Economics; NTTU

Note: Shading based on values within statistic

Demographic data (2 of 2)

- Overseas visitors to the Pacific NW are generally wealthier than visitors to the US
- Overseas visitors to the US are more likely to be repeat visitors, though only slightly
- Visitors from France and Japan are particularly wealthy compared to all visitors to the US from those markets
- The male/female distribution is fairly similar to the US total, though Japan has a high male percentage

Demographic data on visitors to the Pacific NW compared to the US

Index (US=100)

	Mean Annual Income	Percent \$100k HHs	Average age	Repeat US visitor	Percent male
Australia	96	92	104	123	100
Benelux	72	64	105	111	98
Brazil	126	145	95	77	112
China	97	106	98	121	94
France	111	177	96	111	116
Germany	122	129	105	105	105
India	121	135	105	95	99
Japan	121	165	107	105	129
Nordic Countries	110	136	100	112	112
South Korea	106	152	95	123	93
United Kingdom	103	118	101	104	105
Overseas	114	130	101	104	110

Sources: Tourism Economics; NTTO

5) Target Market Indices

Markets to target (1 of 2)

Key details on select markets can help reveal the best markets to focus campaign efforts on.

We first compiled data from other sections of this report including visitor volume and spending, per trip spending, leisure and hotel user share, and forecasted growth rate to provide insights into the best markets to target.

Individually, the indicators provide some insight into which markets represent high quality markets worth targeting.

Next, we combine these numbers to create two indices: one that includes all six indicators, and one that excludes the market size indicators (visitor volume and spending) and includes the other four indicators. These are called the market target indices.

Key features of major markets

	2018 visitors (000's)	2018 spending, millions	Per trip spending, 2018	Leisure %	Hotel users %	Forecasted 10-yr growth %
China	71	\$261	\$3,659	33%	56%	119%
Japan	70	\$90	\$1,291	33%	83%	18%
United Kingdom	46	\$68	\$1,493	46%	65%	45%
Germany	33	\$46	\$1,382	52%	65%	29%
Australia	30	\$42	\$1,387	58%	64%	44%
South Korea	21	\$35	\$1,674	36%	65%	72%
Nordic Countries	15	\$25	\$1,656	37%	65%	46%
Benelux	14	\$16	\$1,170	54%	67%	50%
France	13	\$14	\$1,088	42%	56%	37%
India	10	\$17	\$1,662	14%	56%	101%
Brazil	8	\$11	\$1,348	32%	56%	65%

Sources: Tourism Economics; NTTO

Markets to target (2 of 2)

- Due to the size of their markets, Japan and the UK score well in the including size index.
- Australia and South Korea both score well in the excluding size index.
- Some mature markets such as France, Germany, and the Nordic Countries appear the least appropriate markets to target.

China stands out with strong scores across most indicators and the top scores in both indices.

Market target index scores for key markets

Index (average = 100)

	2018 visitors (000's)	2018 spending, millions	Per trip spending	Leisure %	Hotel users %	Forecasted 10-yr growth %	Index score including size*	Index score excluding size*
China	237	459	226	83	88	209	217	152
Japan	232	159	80	83	130	31	119	81
United Kingdom	152	120	92	117	103	80	111	98
Germany	111	81	85	131	102	51	93	92
Australia	100	74	86	146	101	77	97	102
South Korea	70	62	103	90	102	128	92	106
Nordic Countries	49	43	102	92	102	81	78	94
Benelux	46	28	72	136	106	88	79	101
France	44	25	67	106	88	65	66	82
India	33	29	103	36	88	177	78	101
Brazil	27	19	83	81	88	114	69	92

Sources: Tourism Economics; NTTO

* the average of the six indicators

** the average of the four indicators, excluding visitor volume and size

Key takeaways

Key takeaways

- 1 Asian countries tend to have lower rates of leisure travel than European Countries.
- 2 Asian countries generally prefer urban activities while Western countries prefer history/cultural and sports/outdoors activities.
- 3 Visitors from developed countries tend to be richer and older.
- 4 In our market target index analysis, China stands out as the top market to target.

About Tourism Economics

Tourism Economics is an Oxford Economics company with a singular objective: combine an understanding of tourism dynamics with rigorous economics in order to answer the most important questions facing destinations, developers, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, tourism forecasting models, tourism policy analysis, and economic impact studies.

With over four decades of experience of our principal consultants, it is our passion to work as partners with our clients to achieve a destination's full potential.

Oxford Economics is one of the world's leading providers of economic analysis, forecasts and consulting advice. Founded in 1981 as a joint venture with Oxford University's business college, Oxford Economics enjoys a reputation for high quality, quantitative analysis and evidence-based advice. For this, it draws on its own staff of more than 120 professional economists; a dedicated data analysis team; global modeling tools, and a range of partner institutions in Europe, the US and in the United Nations Project Link. Oxford Economics has offices in London, Oxford, Dubai, Philadelphia, and Belfast.

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