



**TRAVEL**



**OREGON**

**DATA GATHERING AND  
APPLICATION**

**11.04.25**

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- How Travel Oregon profiles visitors
- Overall findings (preliminary)
- Who are the visitors engaging in Native American Tourism Experiences?

## 04 Other available data points

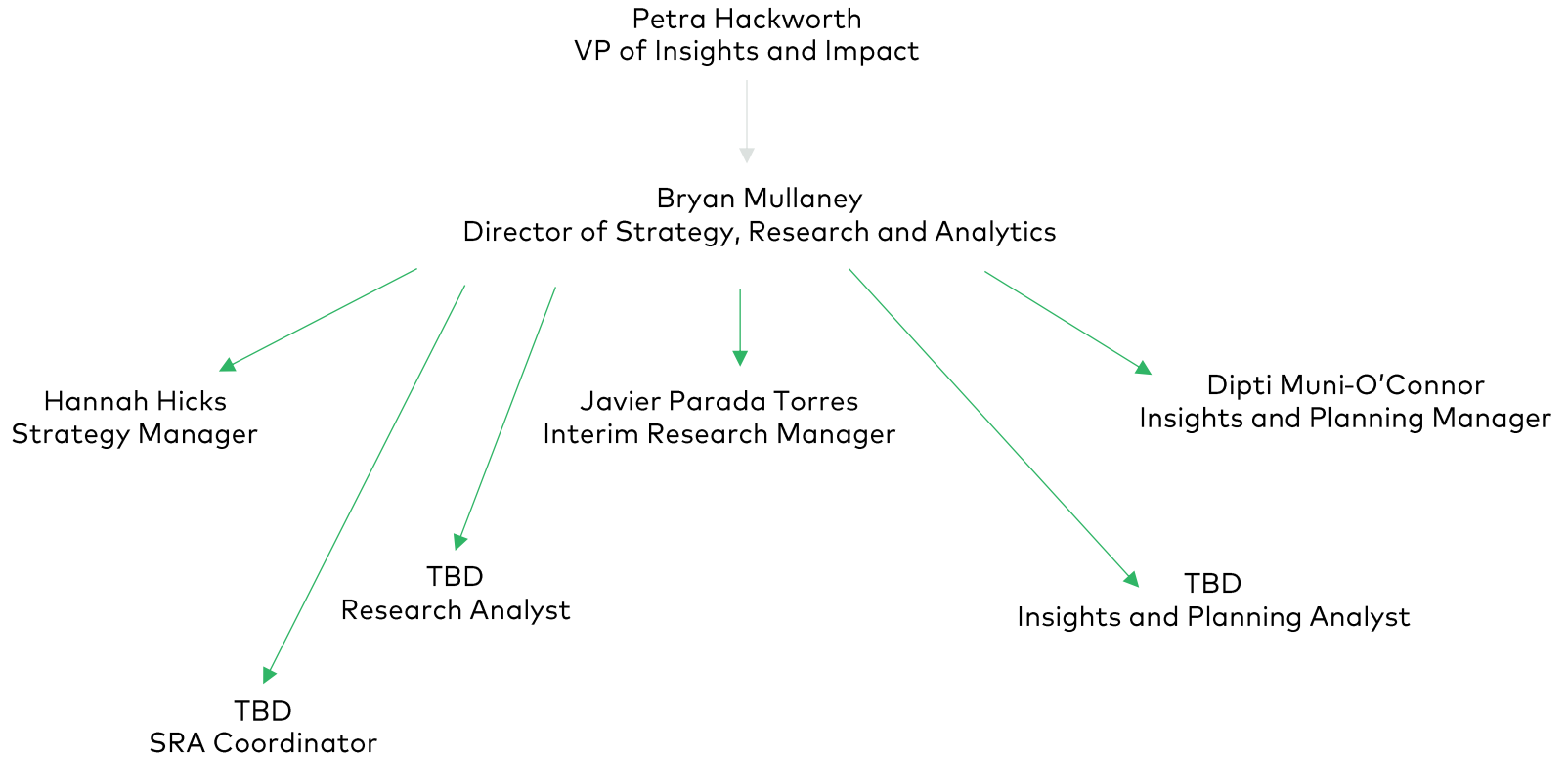
- Lodging (Hotel, Short Term Rentals)
- Visa spending data
- Economic Impact of travel

# WHAT IS THE SRA TEAM?

## STRATEGY, RESEARCH & ANALYTICS (SRA)

- Our team sits within the Insights & Impact Department
- We drive informed decision-making through research and analytics
- The team executes and manages research studies
- We also assist other departments and external partners with research needs, monitor industry trends, support media requests, and more!

# WHO IS THE SRA TEAM?



# SRA INTAKE BRIEF



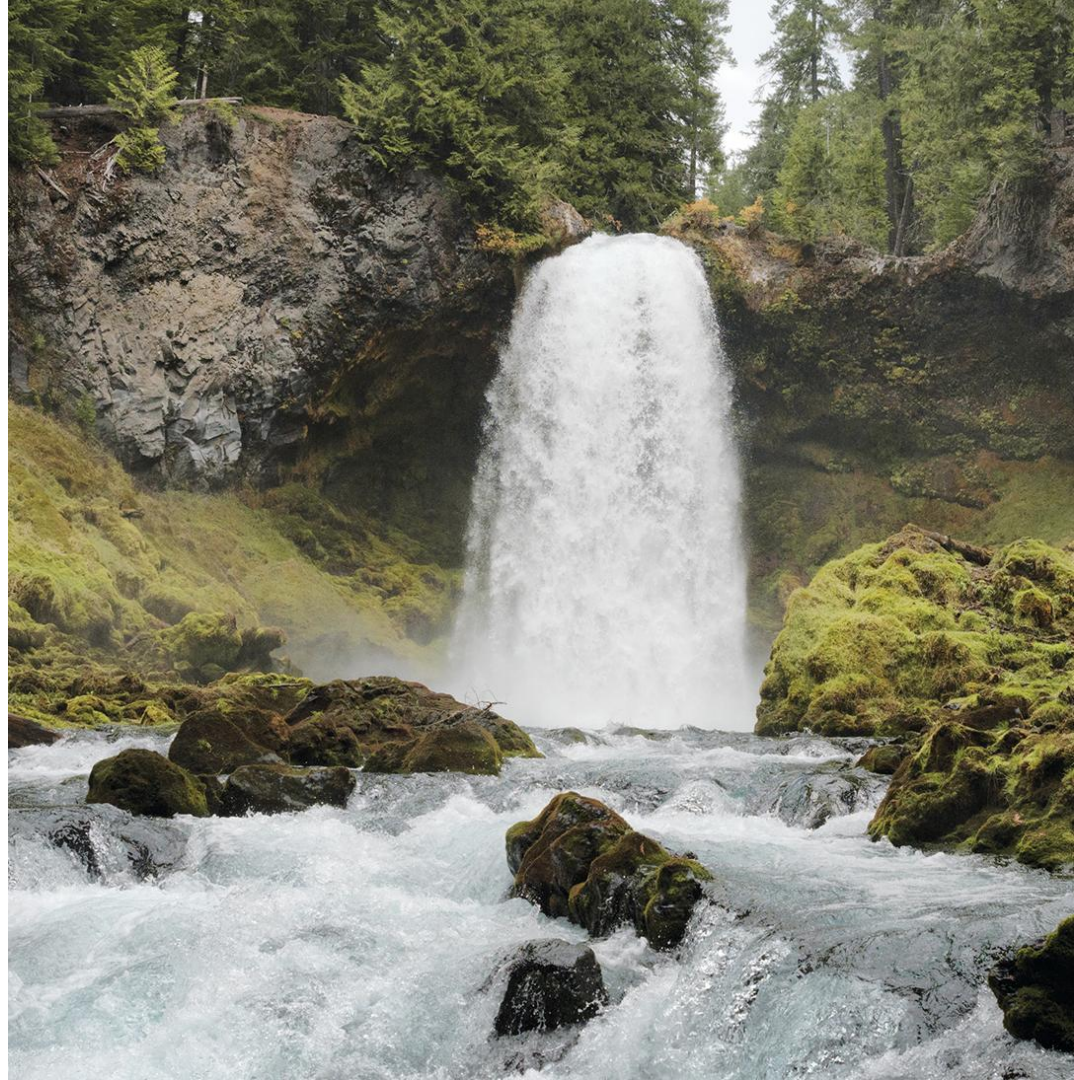
## NEED HELP FROM THE SRA TEAM?

- Some examples
  - Reviewing existing research studies/questionnaires
  - Compilation of data from existing studies
  - Talking points on existing research
  - Questions about purchasing research or data
  - Speaking requests

# OREGON VISITOR PROFILE

# HOW DO WE PROFILE VISITORS?

- Online questionnaire/survey
- Panel of in state and out of state visitors
- Panel of Canadian travelers
- Travel Oregon Welcome Centers



# HOW DO WE PROFILE VISITORS?

- Who are our visitors
- Motivations
- Perceptions
- Behaviors
- Planning



# HOW DO USE THIS DATA?

Market segmentation (e.g., which activities are more popular therefore show more potential return on ad spend when showcased)

Project evaluation and justification – Does demand truly exist for a project idea? E.g., Recreation Ready

Understanding differences between different groups of visitors (e.g., visitors who engage in Native American Tourism experiences vs the average Oregon visitor).



# OREGON VISITOR DEMOGRAPHICS



## Gender

Male: 53%

Female: 46%



## Average Age: 46

Millennials: 38%

Gen X: 24%

Boomers+: 21%

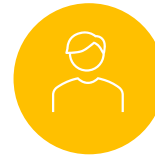
Gen Z: 15%



## Marital Status

Married/partnered: 63%

Single: 27%



## Ethnicity/Racial Background\*

White/Caucasian: 64%

Black: 12%

Asian: 12%

Hispanic/Latino: 9%

Native American: 5.5%



## Household Income

Average: \$ 98,904



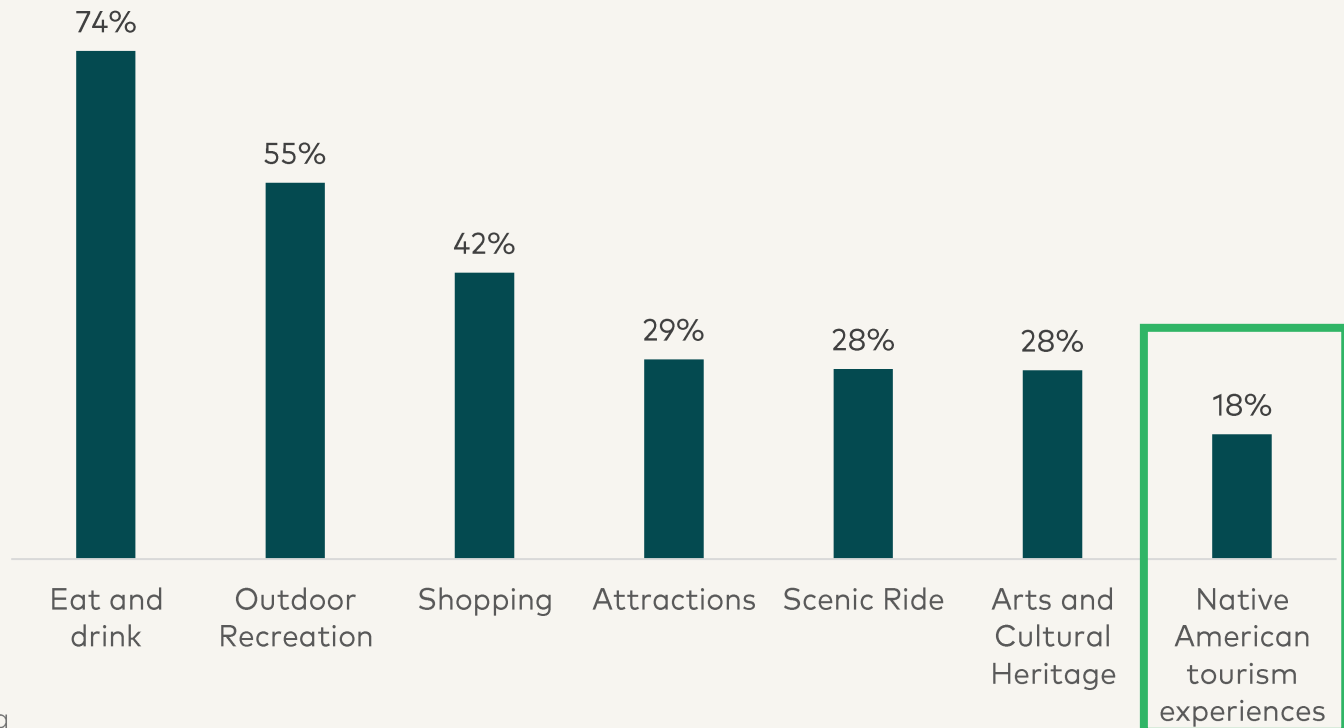
## Accessibility

Has Accessibility Needs: 13%

Note: Based on preliminary 2025 data



# VISITOR ACTIVITIES



Note: Based on preliminary 2025 data

# PRIMARY MOTIVATORS ALL VISITORS

While eat and drink is the most participated in activity, it is not the largest primary motivator for travel

**OUTDOOR RECREATION: 27%**

**EAT AND DRINK: 14%**

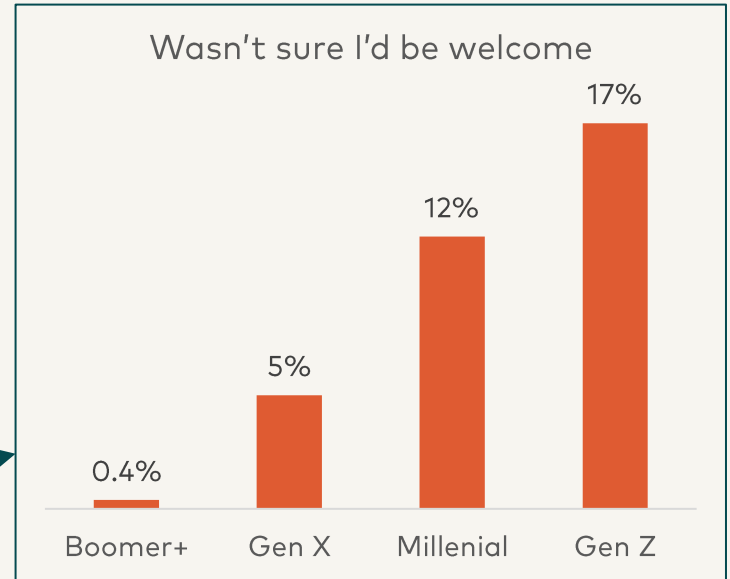
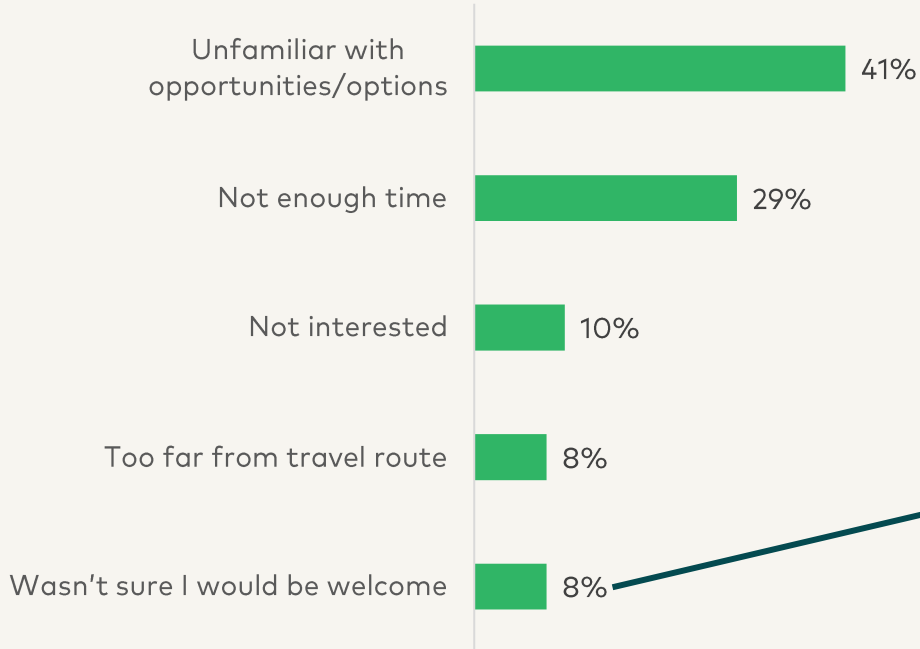
**BUSINESS OR FAMILY EVENTS: 8%**

...

**NATIVE AMERICAN TOURISM EXPERIENCES: 5%**



# REASONS FOR NOT ENGAGING IN NATIVE AMERICAN TOURISM EXPERIENCES



# MORE AVAILABLE INFORMATION

75% of Oregon travelers say they would consider Native American tourism experiences in future travels if they had more information

Older travelers are more on the fence, 28% of boomers indicated they would “maybe” consider the experiences if they had more information (64%)



**PROFILE OF VISITORS  
WHO ENGAGE IN NATIVE  
AMERICAN TOURISM  
EXPERIENCES**



# PARTICIPANTS IN NATIVE AMERICAN TOURISM EXPERIENCES



## Gender

Male: 58%

Female: 41%



## Average Age: 40

Millennials: 48%

Gen X: 21%

Boomers+: 9%

Gen Z: 22%



## Marital Status

Married/partnered: 62%

Single: 32%



## Ethnicity/Racial Background\*

White/Caucasian: 53%

Black: 16%

Asian: 8%

Hispanic/Latino: 10%

Native American: 12%



## Household Income

Average: \$ 99,798

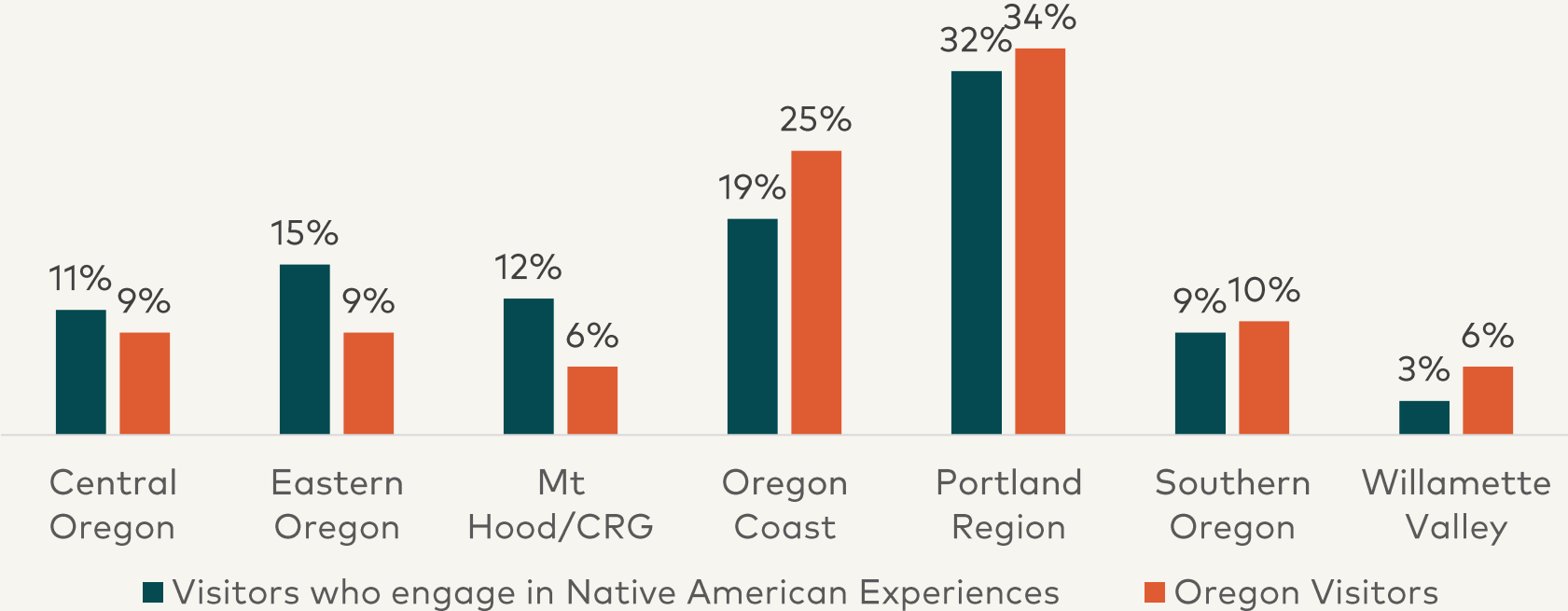


## Accessibility

Has Accessibility Needs: 12%

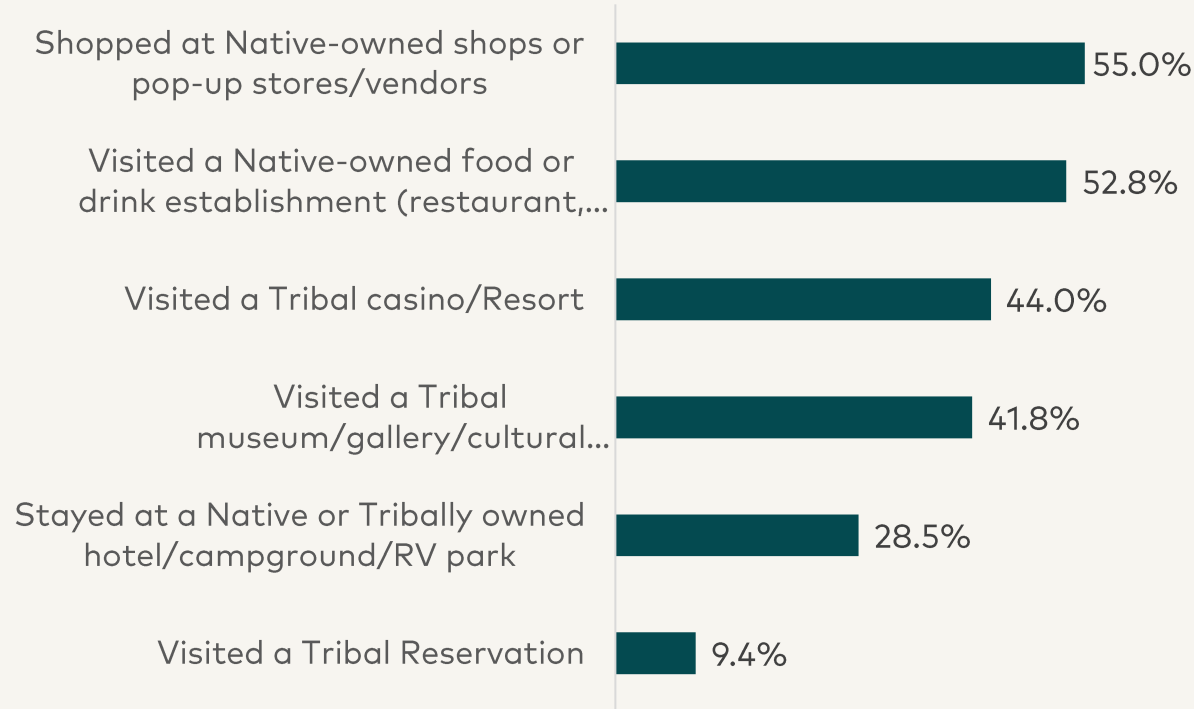
Note: Based on preliminary 2025 data

# PRIMARY REGION VISITED



Note: Based on preliminary 2025 data

# NATIVE AMERICAN TOURISM EXPERIENCES - DETAIL



Note: Based on preliminary 2025 data





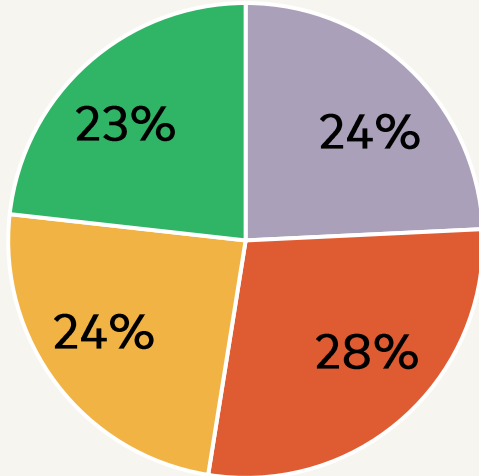
# FAMILIARITY WITH OREGON

88% of visitors who participate in Native American experiences are either familiar or very familiar with things to see and do in Oregon – for comparison, 84% of overall visitors say the same.

However, 45% of visitors who engage in Native American experiences say they are **VERY** familiar, vs 32% for overall visitors.

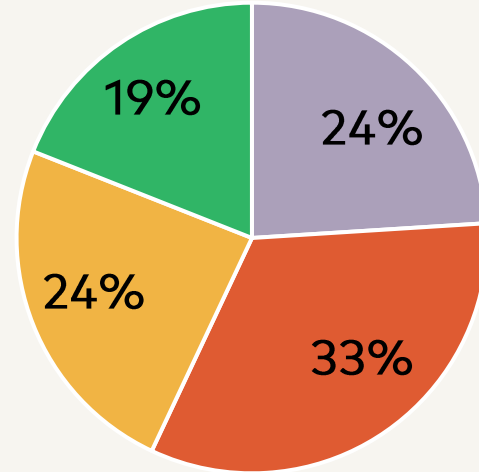
# SEASONALITY

## Visitors that engage in Native American Experiences



■ Spring ■ Summer ■ Fall ■ Winter

## Oregon Visitor



■ Spring ■ Summer ■ Fall ■ Winter



# TRAVEL DECISION DESTINATION ATTRIBUTES

Local food and drinks ↑

Relaxing environment/place to unwind

Scenic Beauty ↓

Quality of service/hospitality ↑

Accommodations/lodging options ↓

Inclusive and welcoming atmosphere

Outdoor recreation ↑

Affordability/value ↓



## TRIP DETAILS

- Average lifetime trips taken: 3.5 (4.3)
- Average nights spent in OR: 4.7 (4.1)
- Arrival mode of transport:
  - Airplane 57% (49%)
  - Own car 24% (36%)
- Self reported daily spend 27% higher than average visitor
- Travel with children 48% (37%)



# TRIP DETAILS

## ACCOMMODATIONS

### Accommodations

- Hotel 57% (58%)
- B&B 37% (21%)
- Motel 29% (20%)
- Campground (tent/RV) 25% (11%)
- Friends/Family 20% (20%)
- Glamping 19% (7%)
- Primitive camp site 15% (6%)

Note: Based on preliminary 2025 data



# TRIP DETAILS

## VISITOR SERVICES

Guided tour participation 58% (34%)

- Culture and history 57%
- Food/agriculture 45%
- Arts 41%

Nearly twice as likely to stop at a Welcome Center 81%  
(43%)

*Travel Guide to*  
**OREGON  
INDIAN  
COUNTRY**



# PLANNING

Average planning window: 4.1 months (3.5)

Use of Travel Guide to Oregon Indian Country:

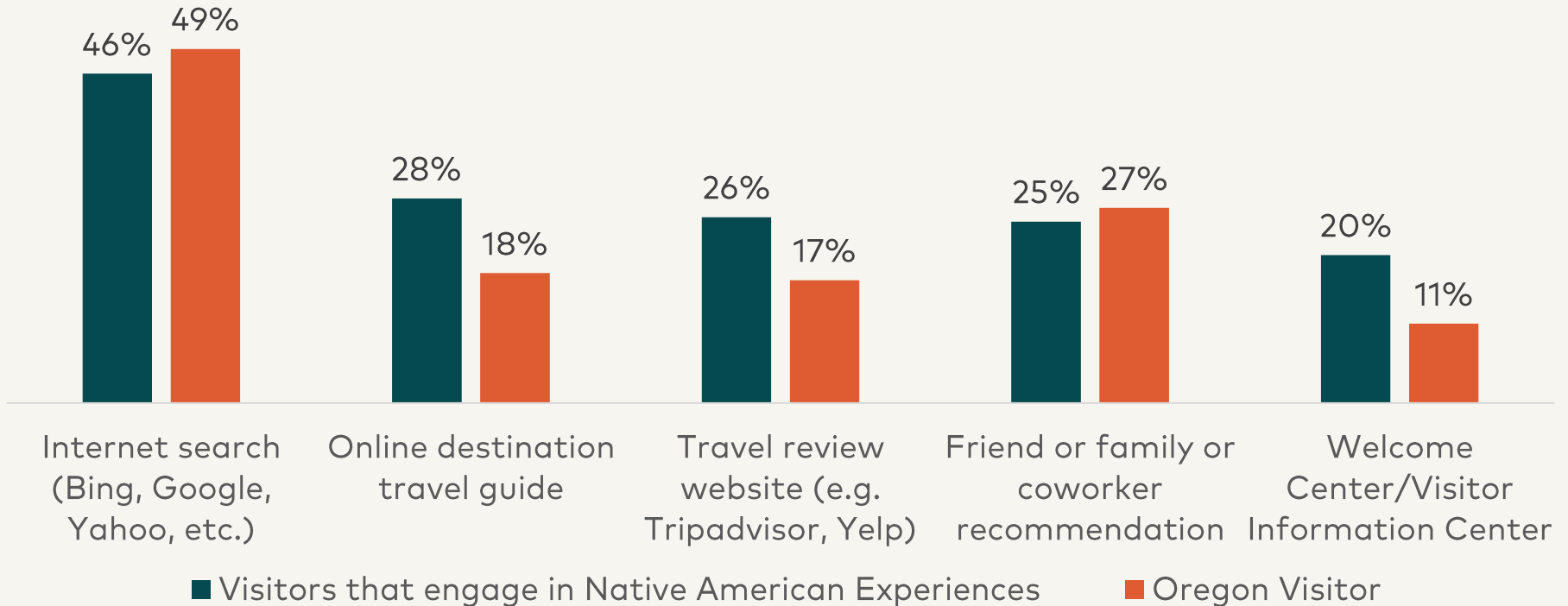
- Yes 47%
- No, but was familiar 30%
- Unfamiliar 23%

Top sources of inspiration:

- Internet search 43% (39%)
- Friend/family/coworker 32% (35%)
- Online travel guide 30% (18%)
- Social media 30% (19%)
- Welcome/Visitor Center 25% (12%)

Note: Based on preliminary 2025 data

# PLANNING TOP RESOURCES



Note: Based on preliminary 2025 data

# TO'S STRATEGIC VISION KPIS

Overall Satisfaction: 96% (97%)

Net Promoter Score (likelihood to recommend): 72 (62)

Likelihood to Return: 91% (86%)



# **OTHER TRAVEL OREGON DATA SOURCES**

# RESEARCH RESOURCES

## TRAVEL INDUSTRY PARTNER SURVEY

Bi-yearly cadence - next version to start late 2026

Study that seeks feedback from individuals linked to the tourism industry. Informs Travel Oregon's biennial strategies and RDMO strategic plans.

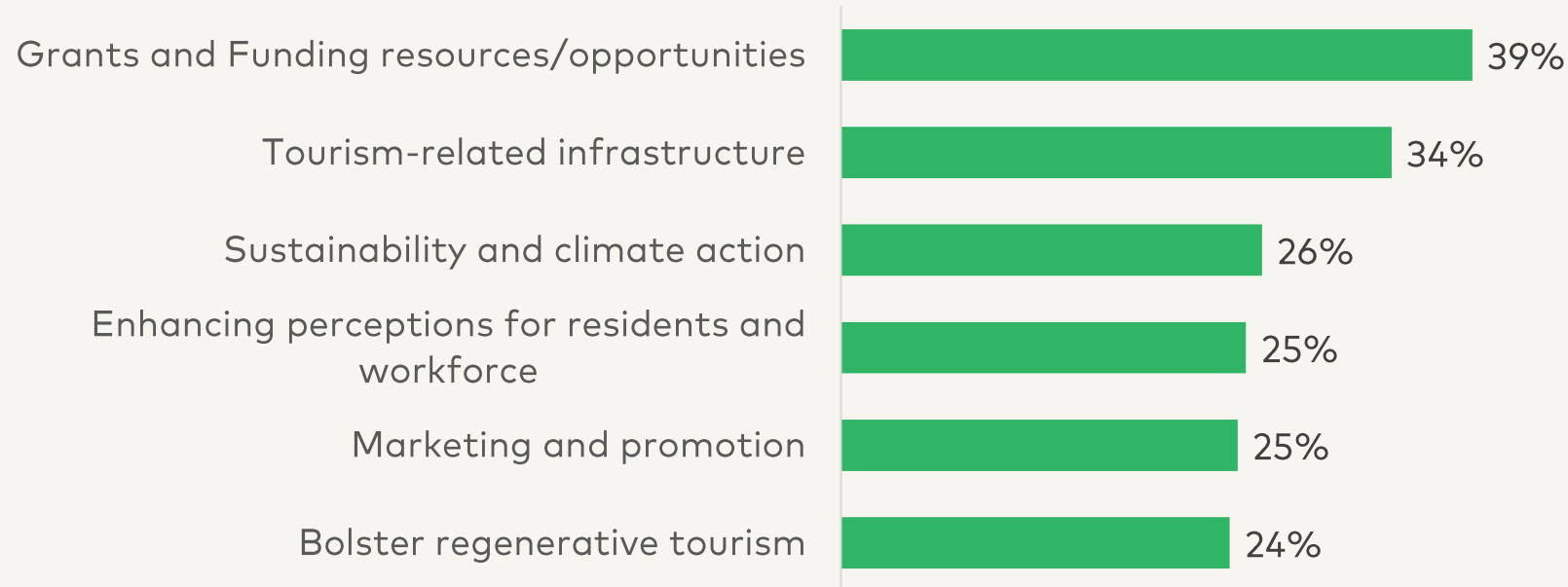
Collaborative project: Regional Cooperative Tourism Program + Research + DMOs, RDMOs, Chambers, ORLA...



# RESEARCH RESOURCES

## TRAVEL INDUSTRY PARTNER SURVEY SAMPLE

*Please identify the three areas you believe should be emphasized for longer-term tourism planning over the next 2-5 years*



# RESEARCH RESOURCES

## RESIDENT SENTIMENT

Bi-yearly cadence - next version to start early 2026

Study that seeks to understand how residents of Oregon perceive tourism impacts their lives. This allows us to understand and act upon key pain points that may drive negative sentiment towards tourism.

Custom Tribal Tourism Committee questions for OR residents? Perceptions of Tribal Tourism?



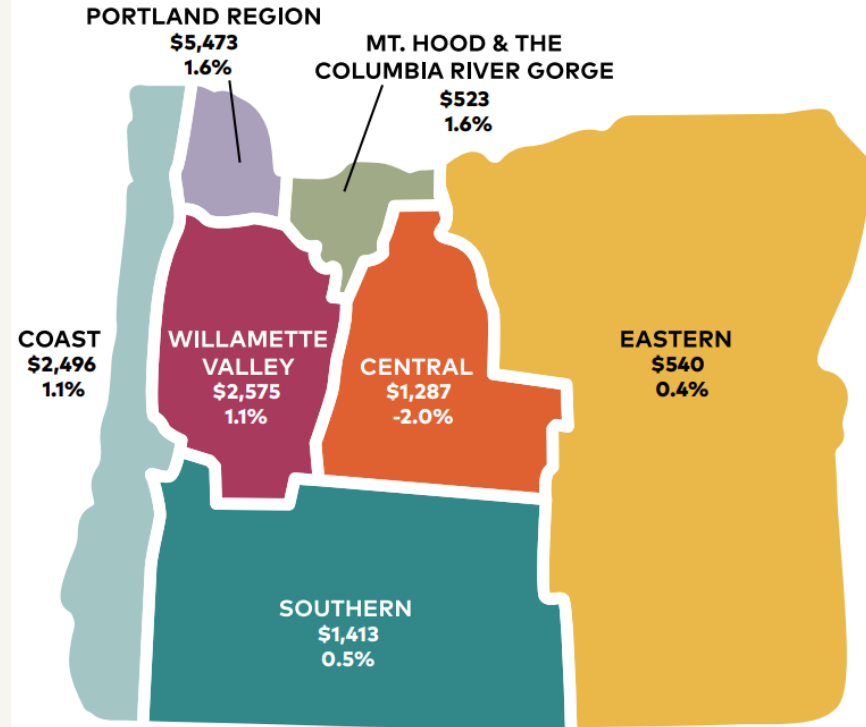
# RESEARCH RESOURCES

## ECONOMIC IMPACT OF TRAVEL

Yearly cadence – finished early Q2 of each year

Study that measures the economic impact of the tourism industry in Oregon at the state, region and county level.

### Regional spending in 2024 (in millions) and % change compared to 2023



# DATA RESOURCES

## LODGING STATISTICS

### Monthly hotel and short-term rental data








- Occupancy, ADR, RevPAR, Supply, Demand and Revenue
- Available at statewide, region and county levels
- STVR data available back to 2018
- Hotel data also available at a weekly cadence



# DATA RESOURCES

## WELCOME CENTER STATS

Travel Oregon Welcome Centers' staff tracks visitation to each of our Welcome Centers, counting visitors and entering total visitor counts into our Travel Stats dashboard available on the industry site

Ashland Welcome Center	 33,319	1.9	29.7%
PDX Welcome Center	 27,754	2.3	24.8%
Ontario Welcome Center	 16,896	2.0	15.1%
Brookings Welcome Center	 15,647	2.2	14.0%
Klamath Welcome Center	 7,697	2.1	6.9%
Seaside Welcome Center	 7,221	1.7	6.4%
Boardman Welcome Center	 3,466	3.1	3.1%

Thank you  
[javierpt@traveloregon.com](mailto:javierpt@traveloregon.com)

