



Oregon 2015  
Regional Visitor Report  
The Willamette Valley Region

# Introduction



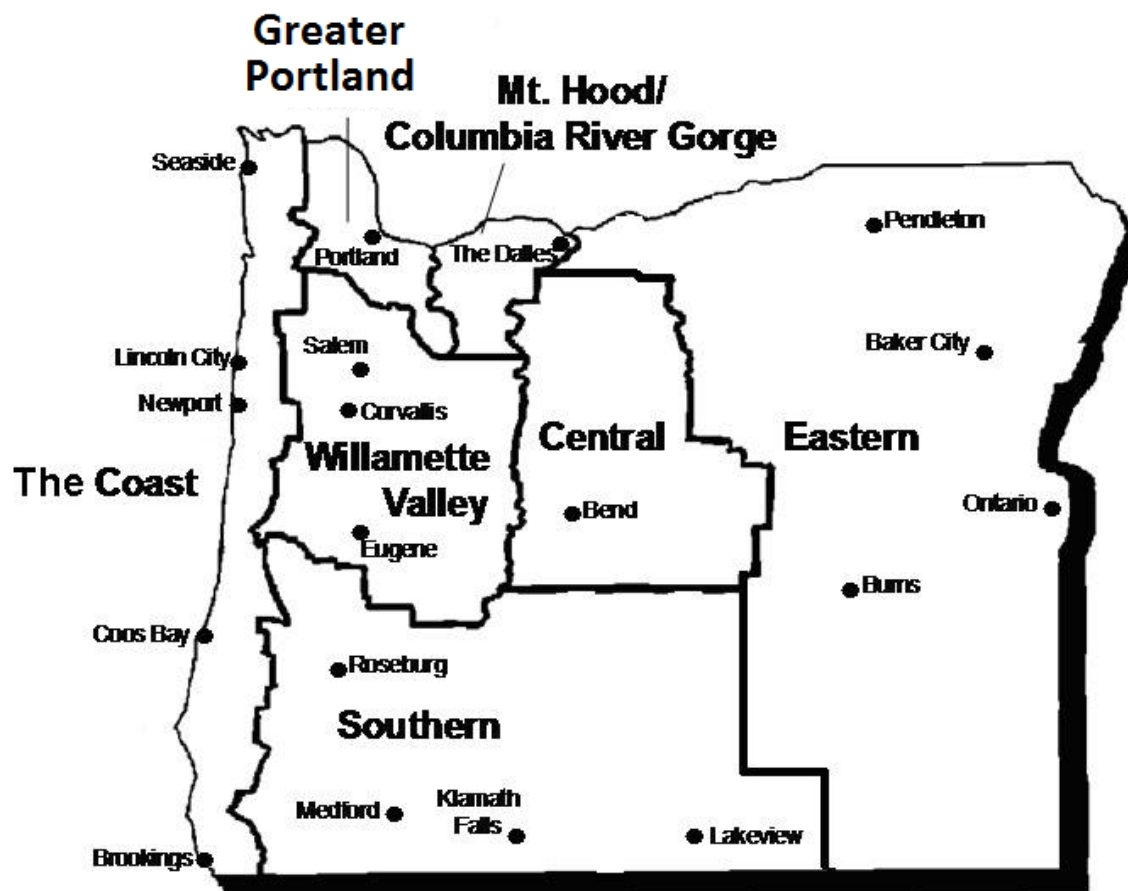
- ◉ Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.
- ◉ It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability 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 Willamette Valley Region in particular*
  - ◉ *Strategic intelligence about the Willamette Valley 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 Willamette Valley 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:
  - *1,046 included a visit to the Willamette Valley Region*
  - *Of those, 371 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 Willamette Valley Region are reported for the 2015 travel year, as are all Oregon state norms.
  - To maximize statistical reliability, other Willamette Valley Region data (trip characteristics and visitor profiles) are based on two years' combined sample from 2014 and 2015 unless otherwise indicated.



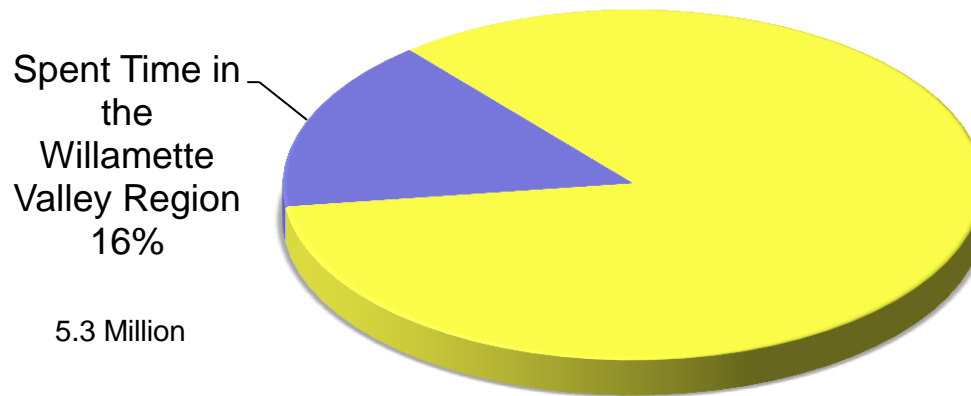
# Travel Market Size & Structure

## - 2015

# Size of the Willamette Valley Region's Overnight Travel Market



**Total Overnight Trips to Oregon\* = 33.1 Million**

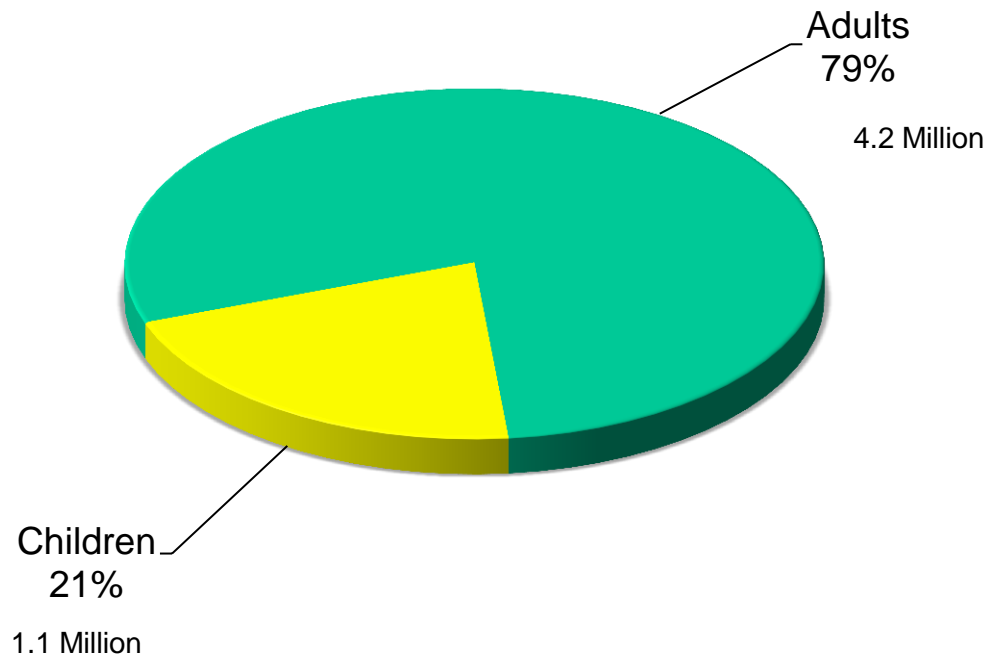


\*Includes both adults and children

# The Willamette Valley Region's Overnight Travel Market — Adults vs. Children

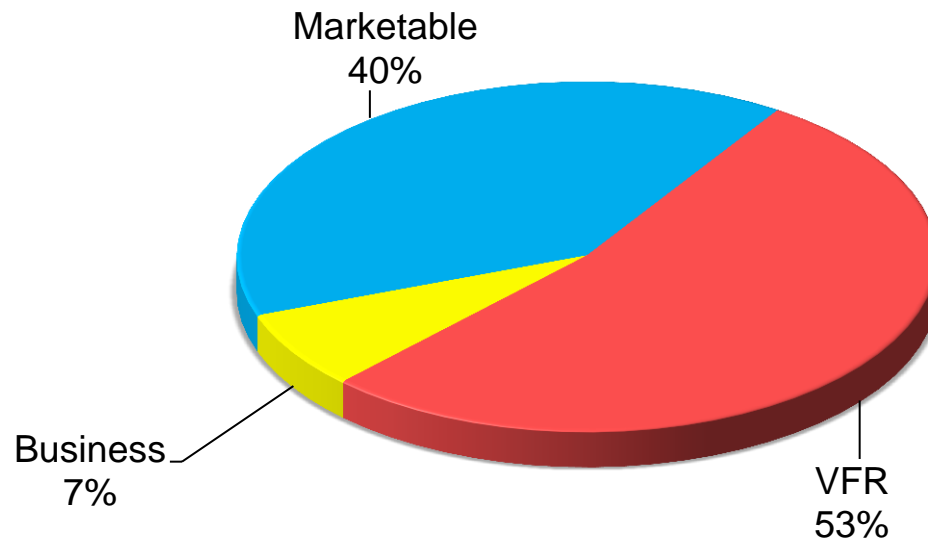


**Total Overnight Trips to the Willamette Valley Region = 5.3 Million**





# The Willamette Valley Region's Overnight Travel Market - by Trip Purpose

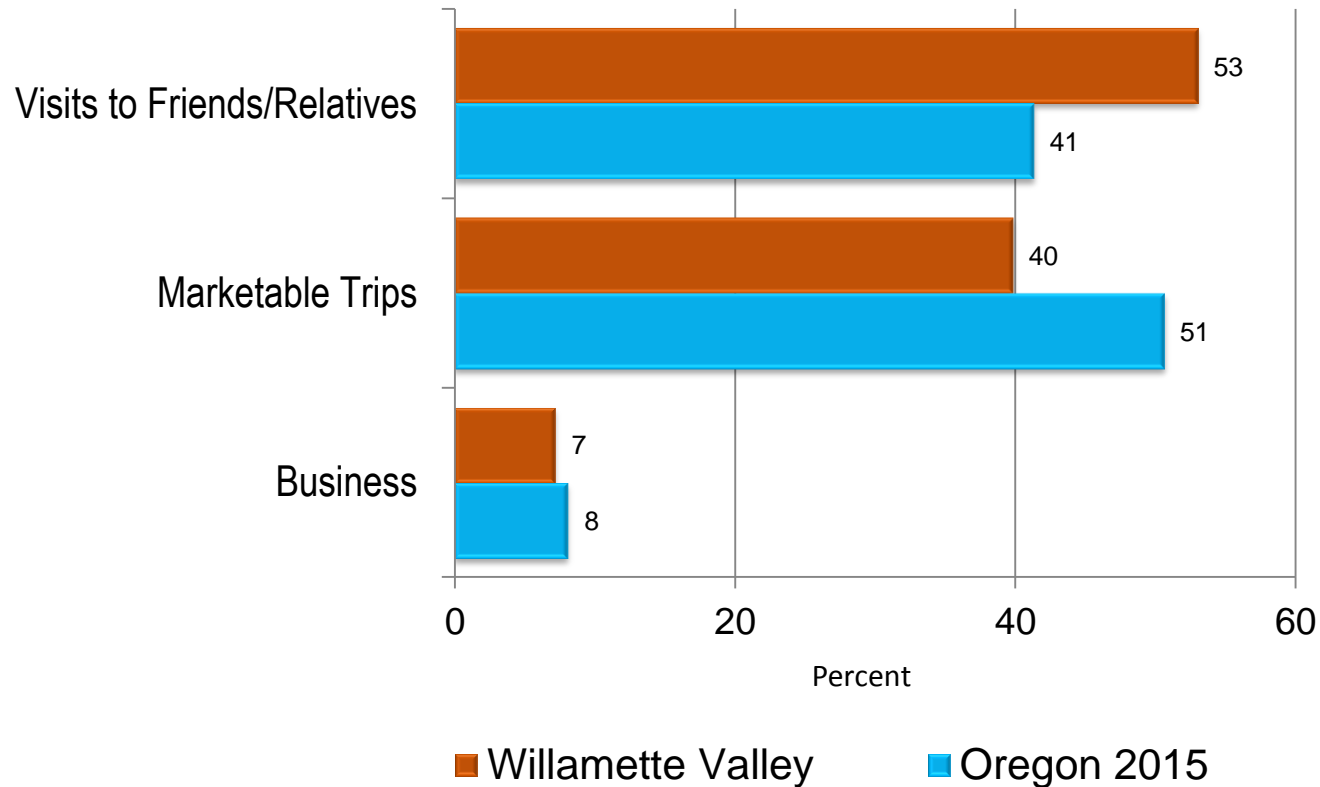


\*Marketable includes Business-Leisure

# The Willamette Valley Region vs. Oregon State – by Trip Purpose



Base: 2015 Overnight Trips

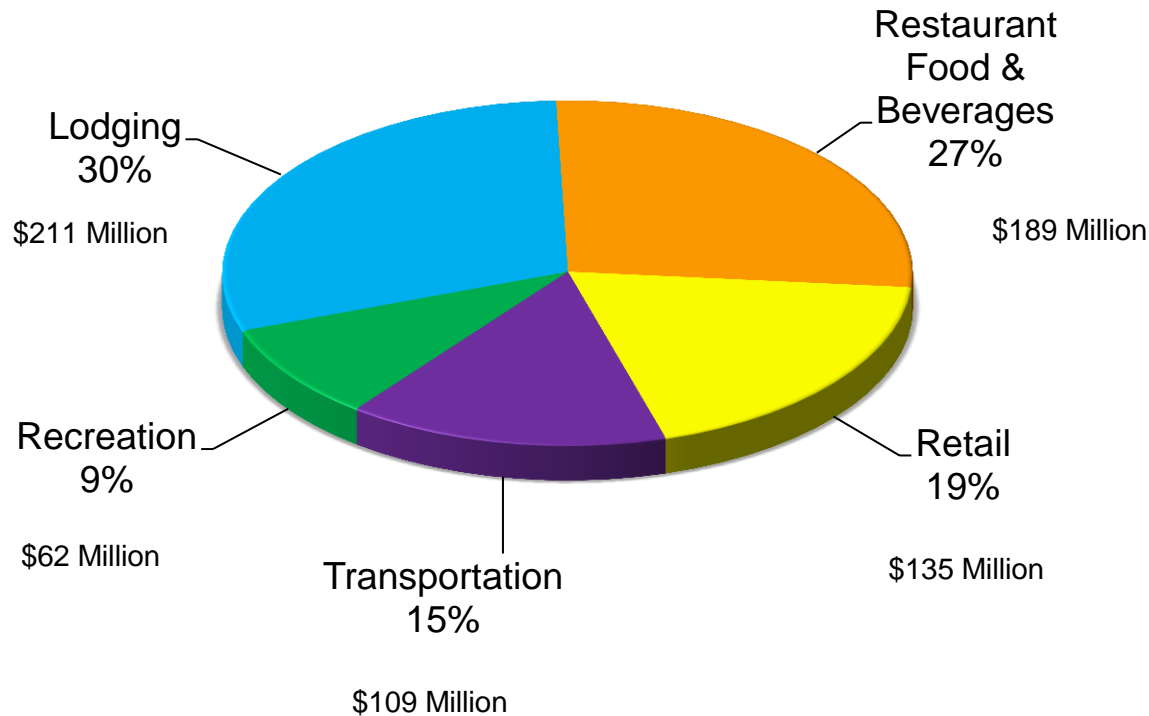


\*Marketable includes Business-Leisure

# 2015 Overnight Spending – by Sector



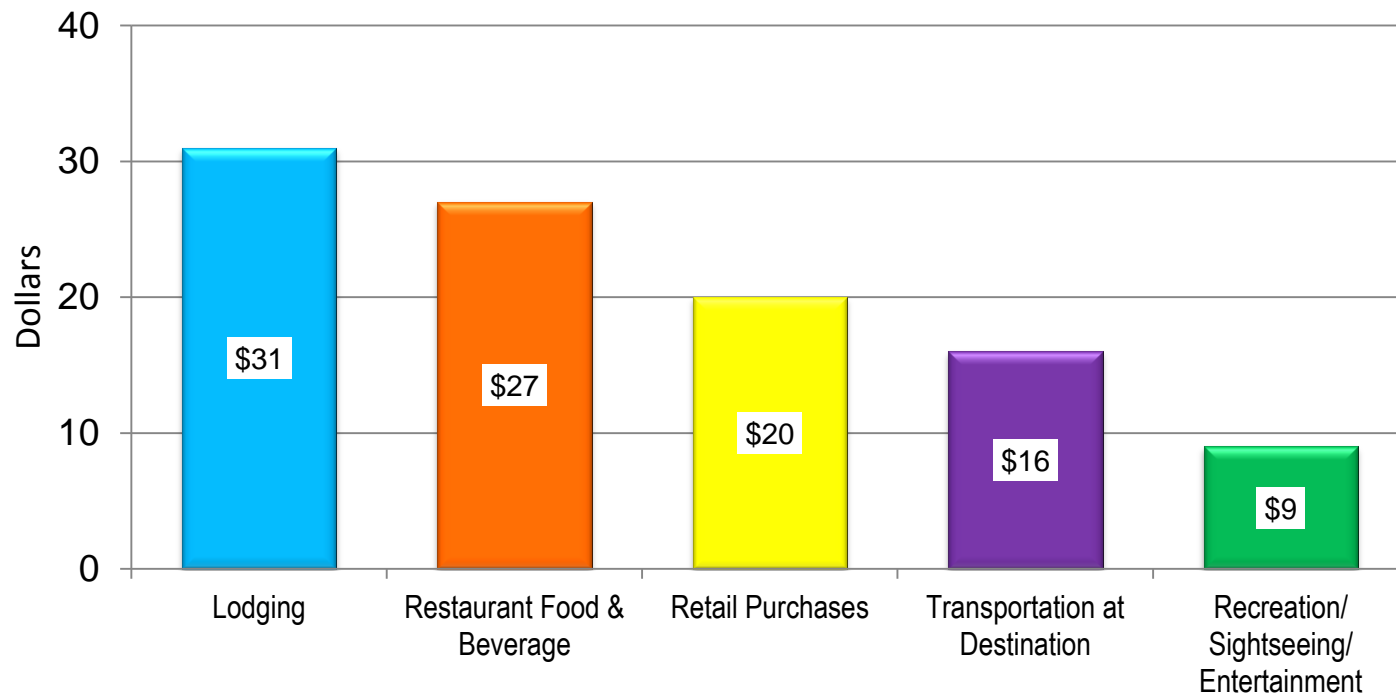
**2015 Willamette Valley Region Spending = \$706 Million**



# Average Per Person Expenditures on Overnight Trips – By Sector



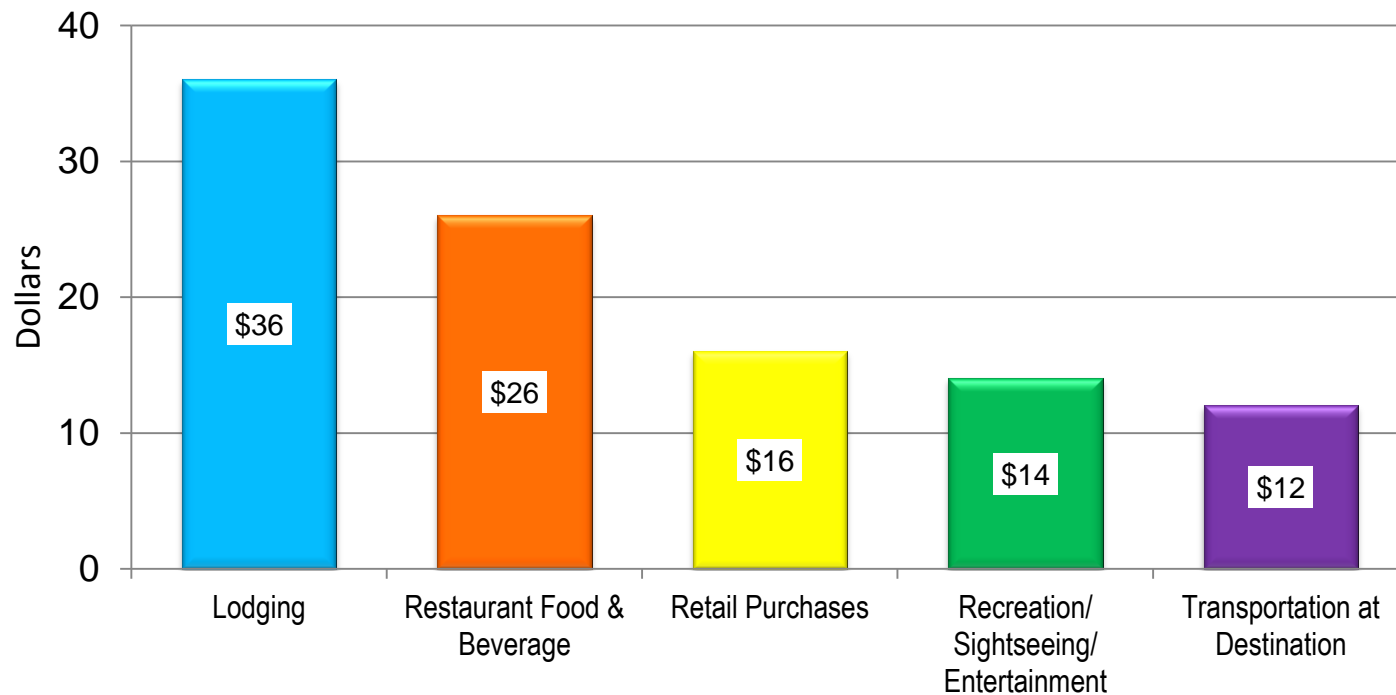
Base: Total Overnight Person-Trips



# Average Per Person Expenditures on Overnight Marketable Trips – By Sector



Base: 2015 Overnight Marketable Trips



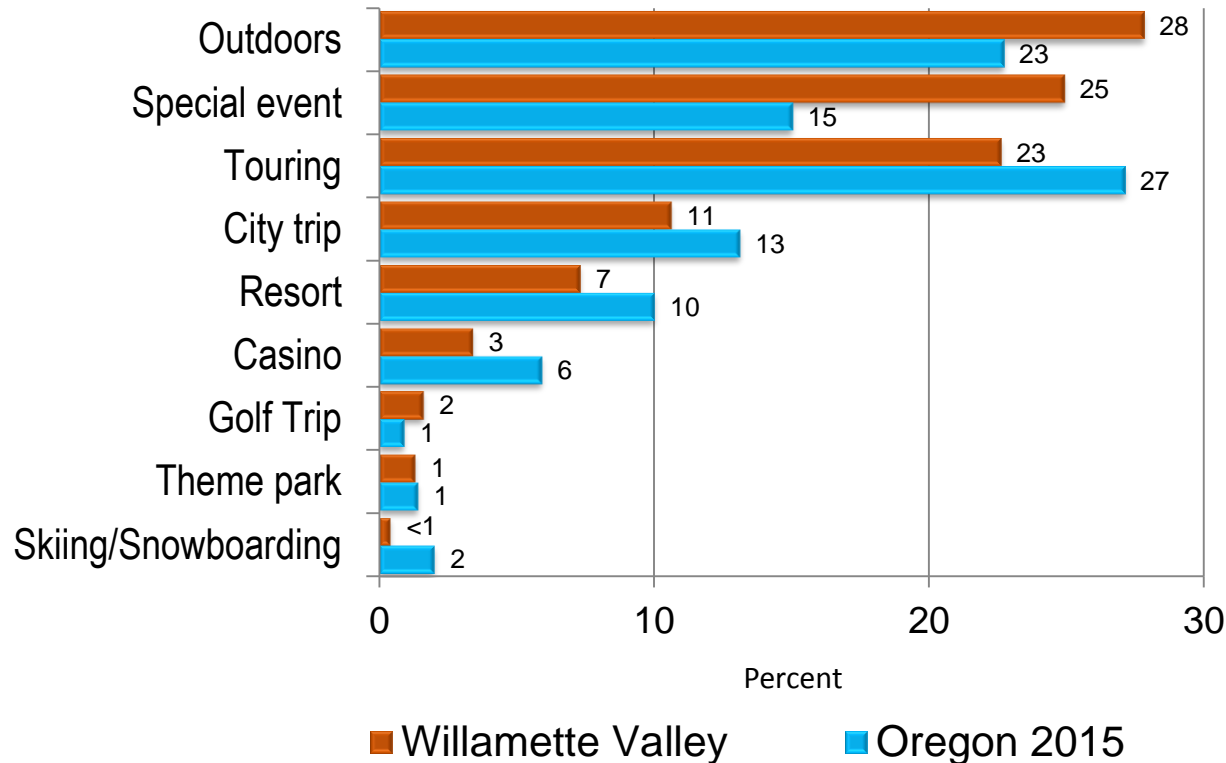


# Marketable Trip Characteristics and Visitor Profile – 2014/2015

# Main Purpose of Marketable Trip – The Willamette Valley Region vs. State Norm



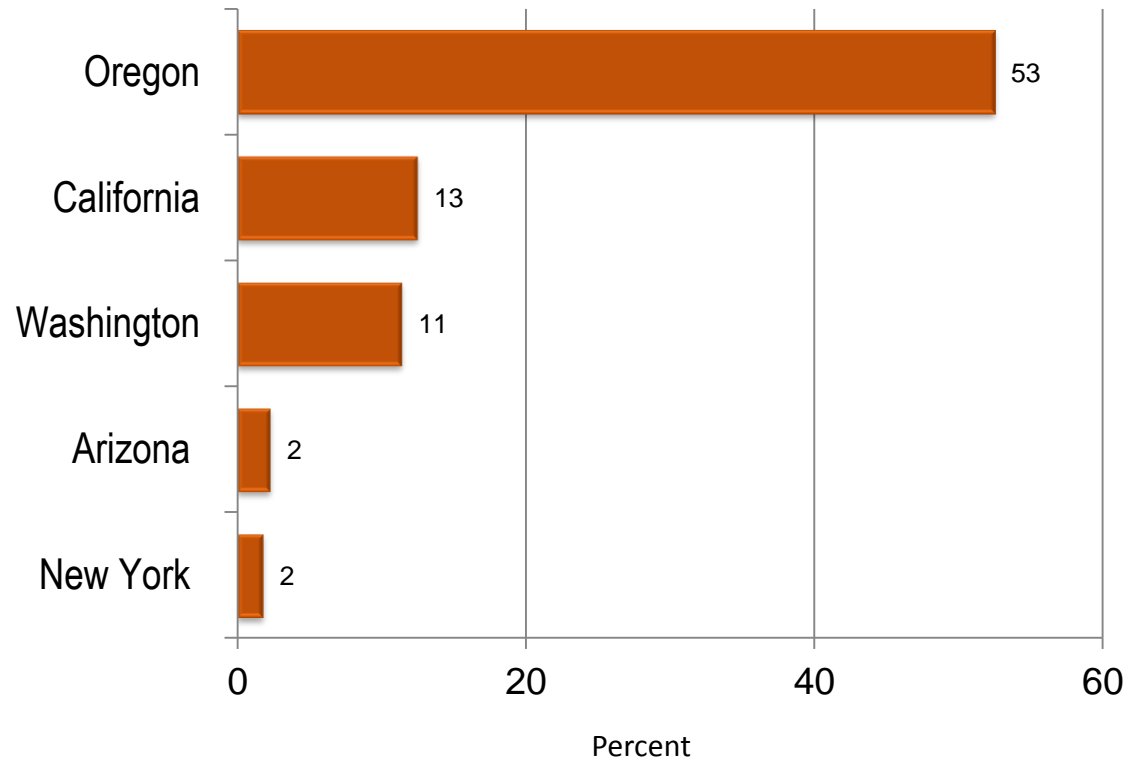
Base: Overnight Marketable Person-Trips



# State Origin Of Overnight Trip



Base: Overnight Marketable Person-Trips

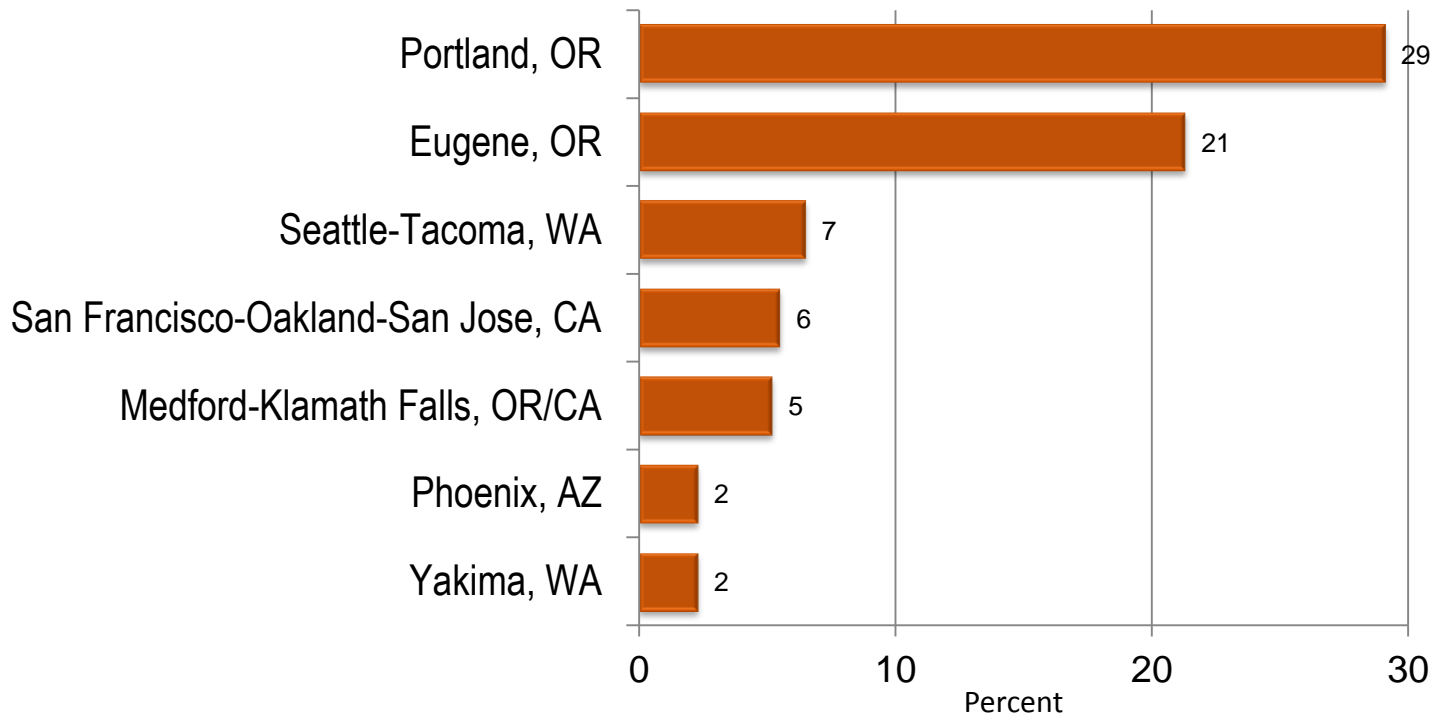




# DMA Origin Of Overnight Trip



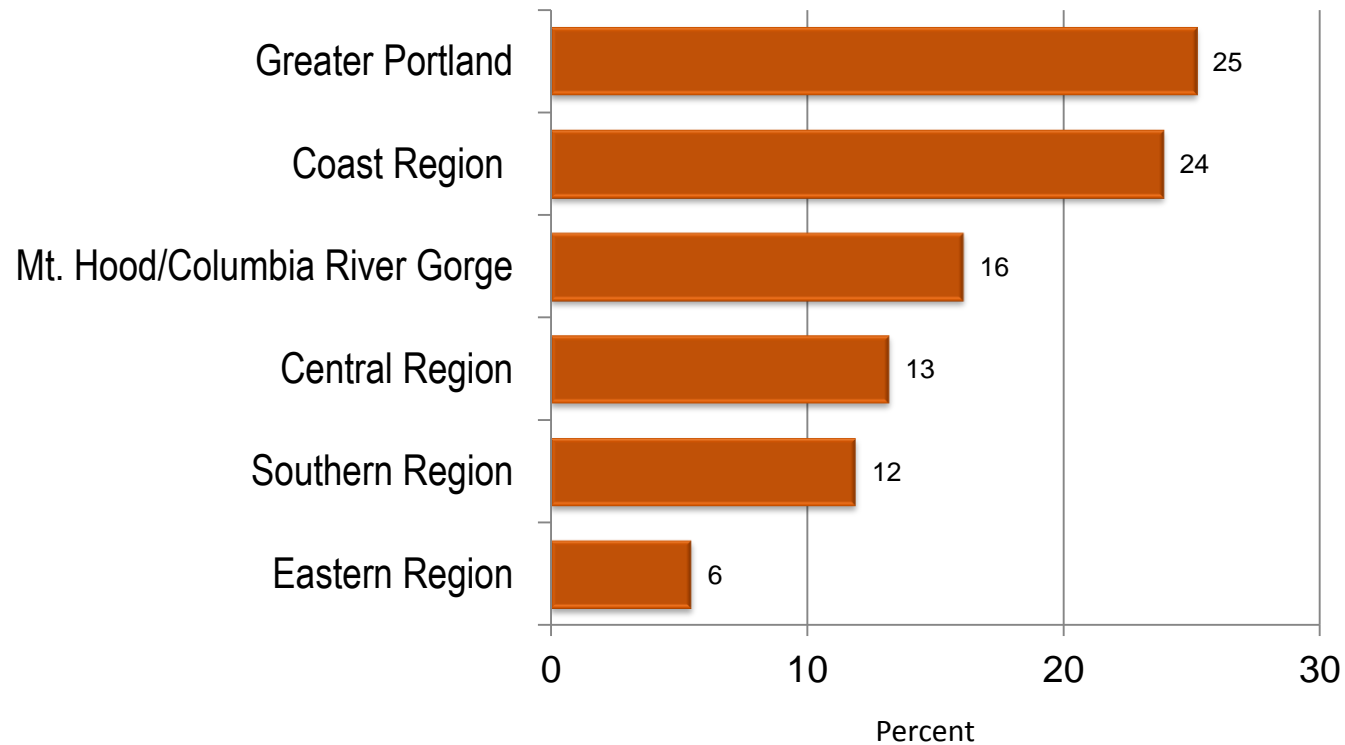
Base: Overnight Marketable Person-Trips



# Other Oregon Regions Visited on Willamette Valley Region Trip



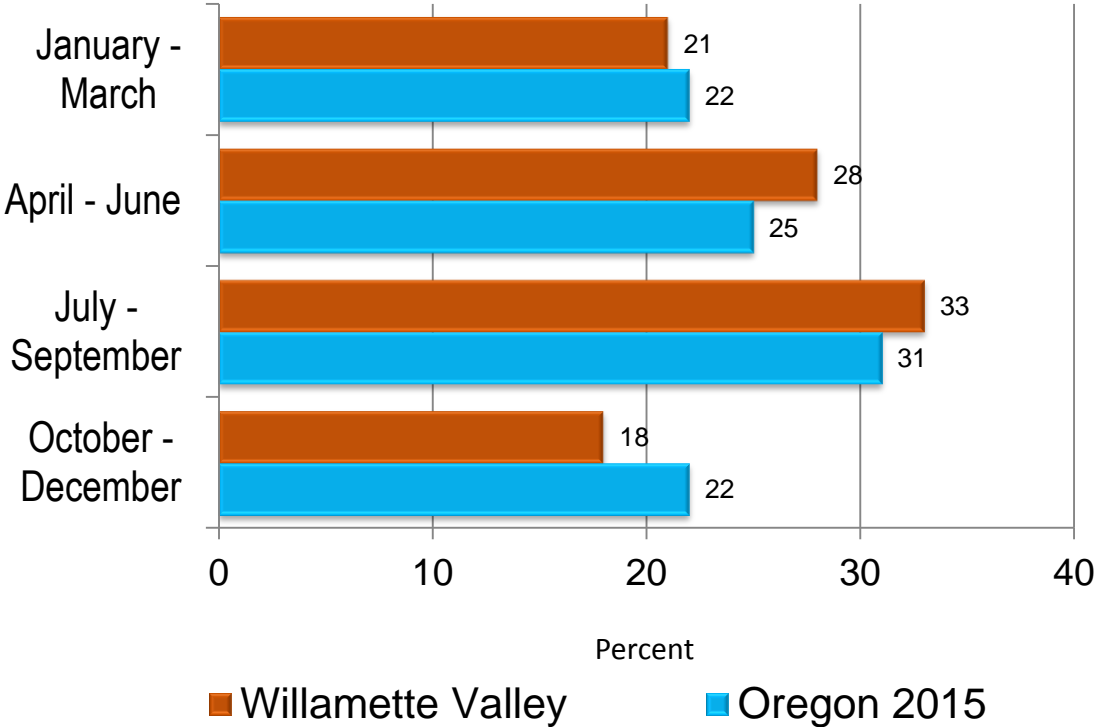
Base: Overnight Marketable Person-Trips



# Season of Trip



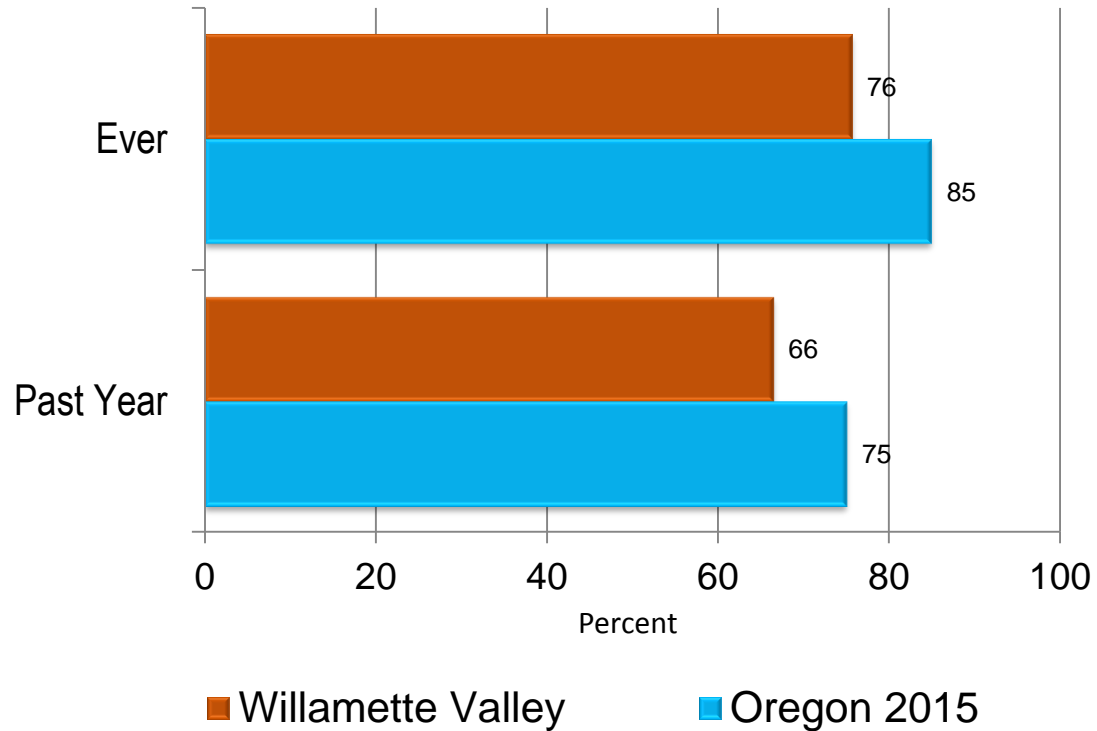
Base: Overnight Marketable Person-Trips



# Past Visitation\*



Base: Overnight Marketable Person-Trips

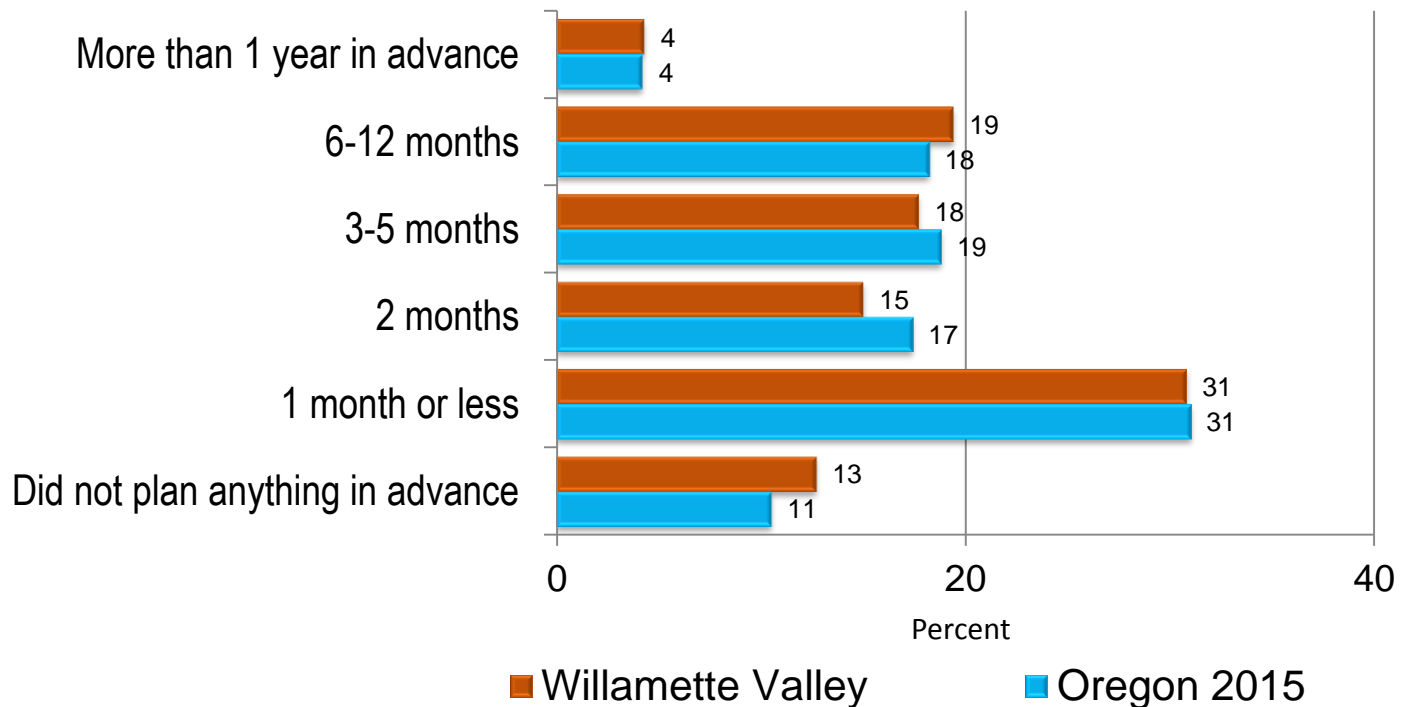


\*New in 2015, data is from 2015 only

# Length of Trip Planning\*



Base: Overnight Marketable Person-Trips

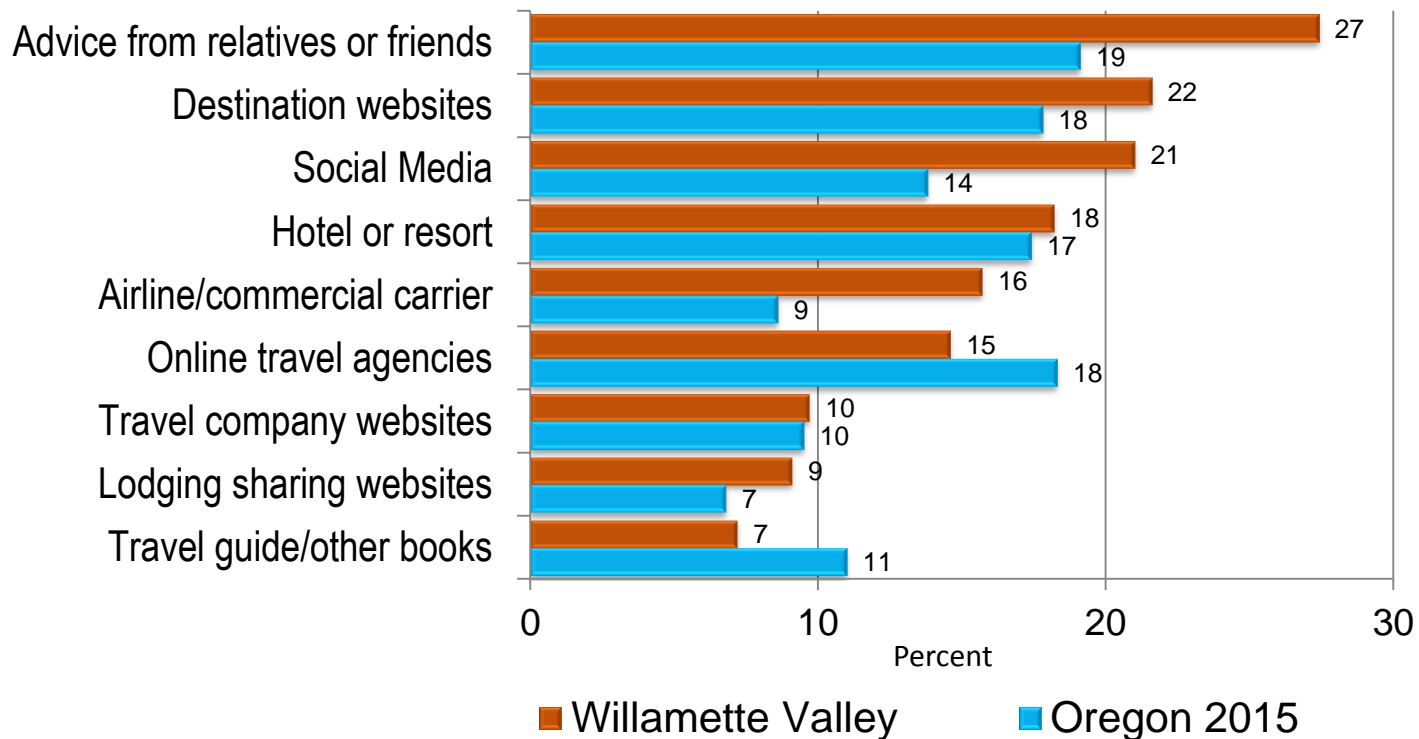


\*New in 2015, data is from 2015 only

# Trip Planning Information Sources\*



Base: Overnight Marketable Person-Trips

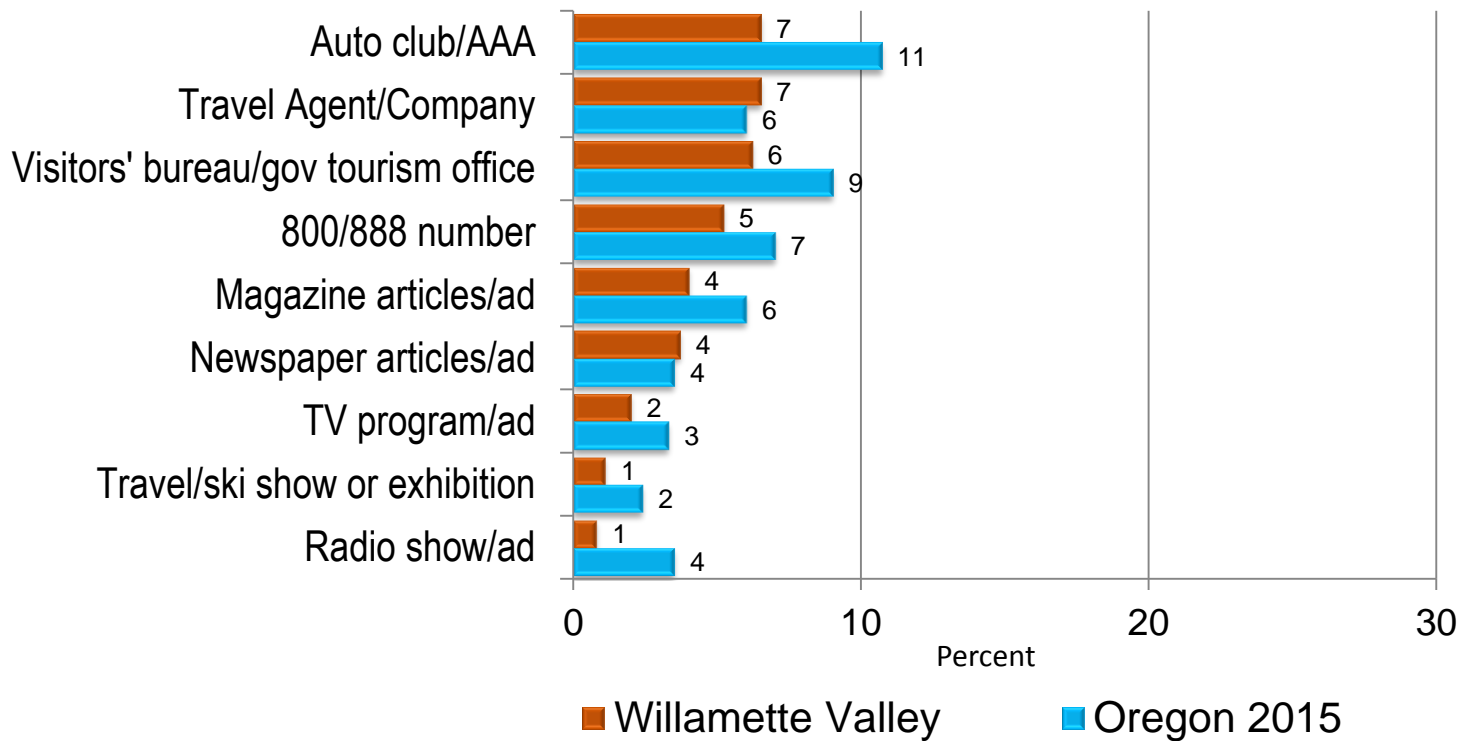


\*New in 2015, data is from 2015 only

# Trip Planning Information Sources\* (Cont'd)



Base: Overnight Marketable Person-Trips

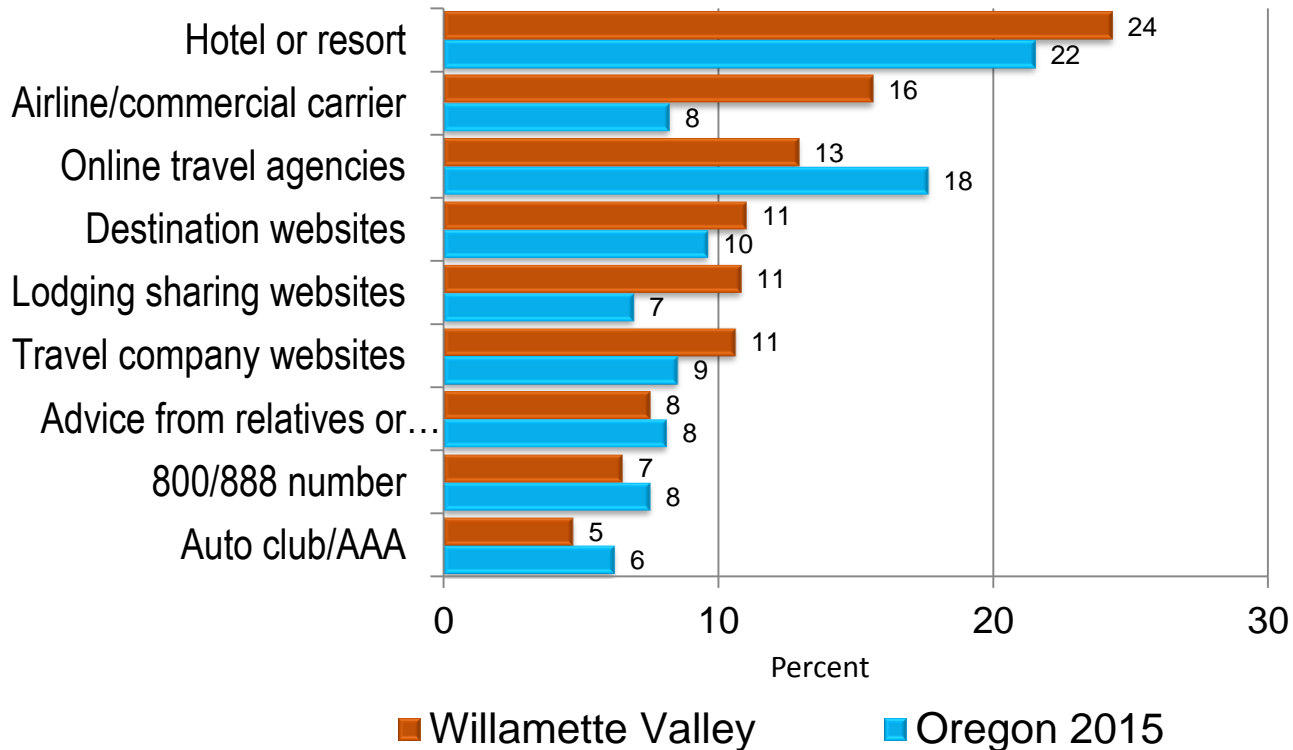


\*New in 2015, data is from 2015 only

# Method of Booking Trip\*



Base: Overnight Marketable Person-Trips



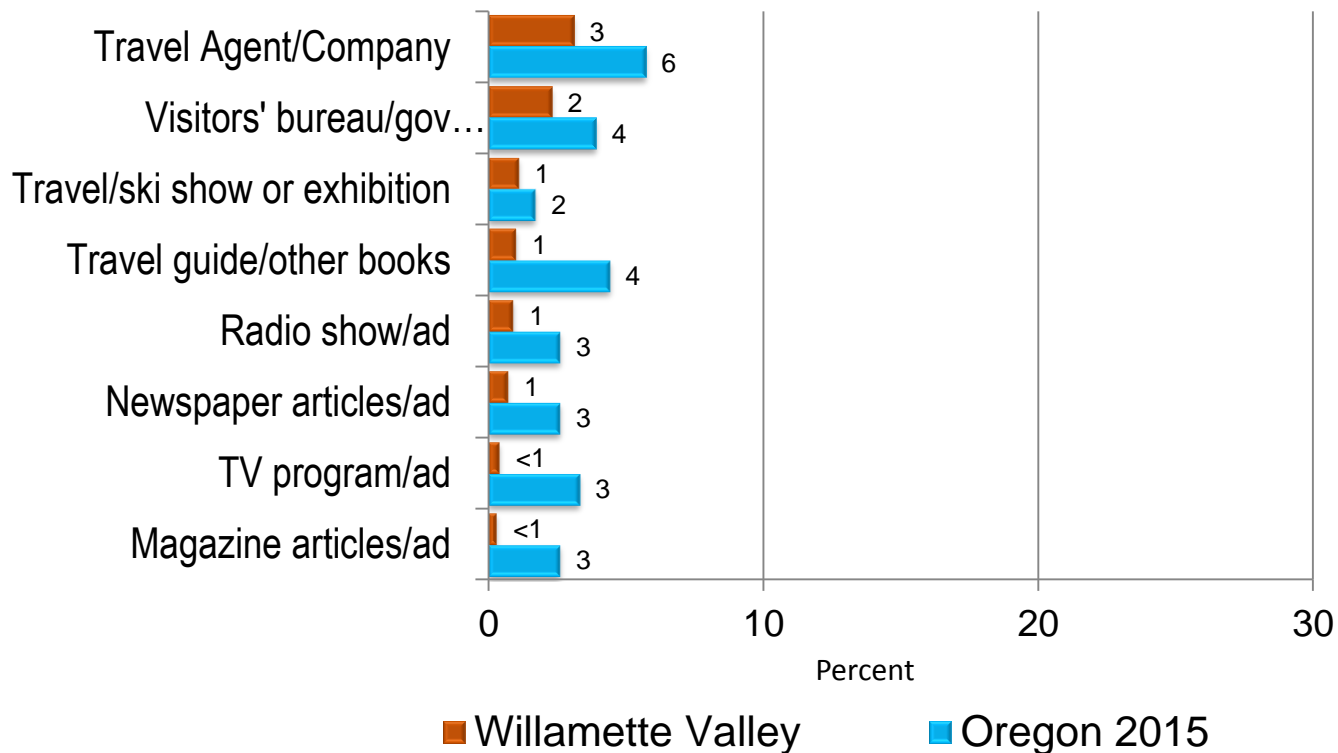
\*New in 2015, data is from 2015 only



# Method of Booking Trip\* (Cont'd)



Base: Overnight Marketable Person-Trips

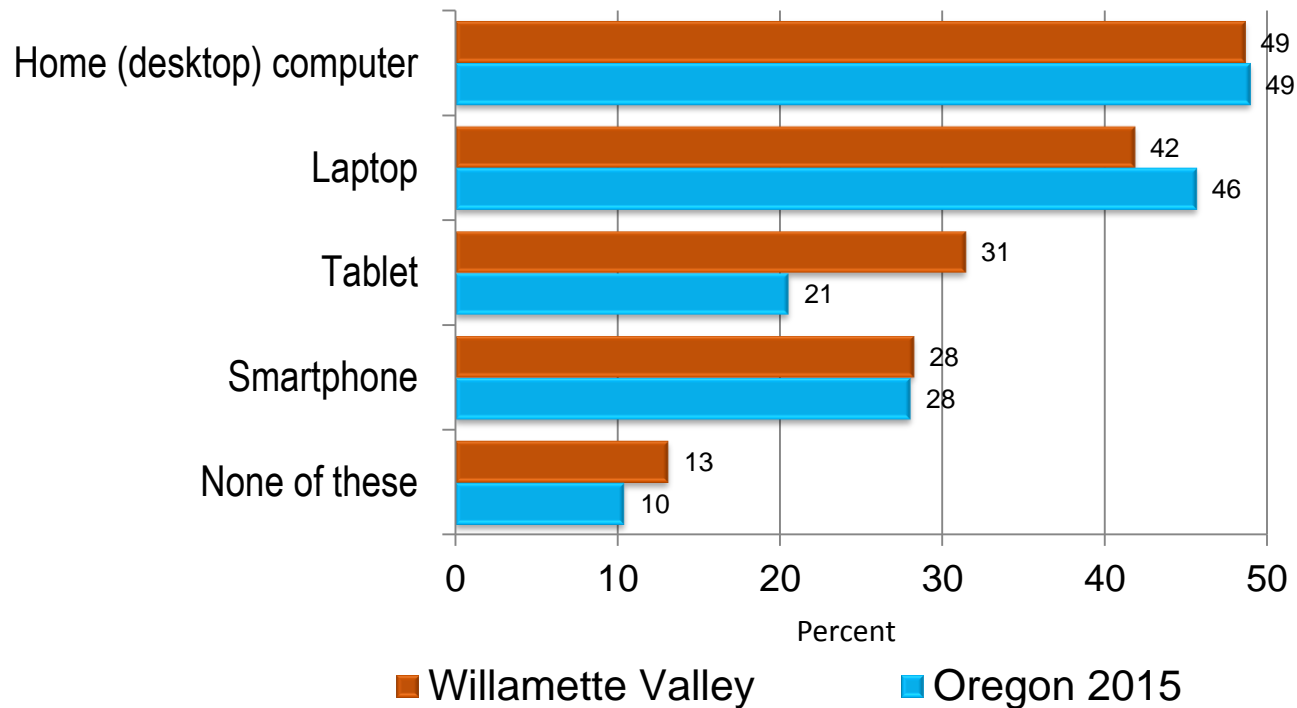


\*New in 2015, data is from 2015 only

# Devices Used for Trip Planning\*



Base: Overnight Marketable Person-Trips

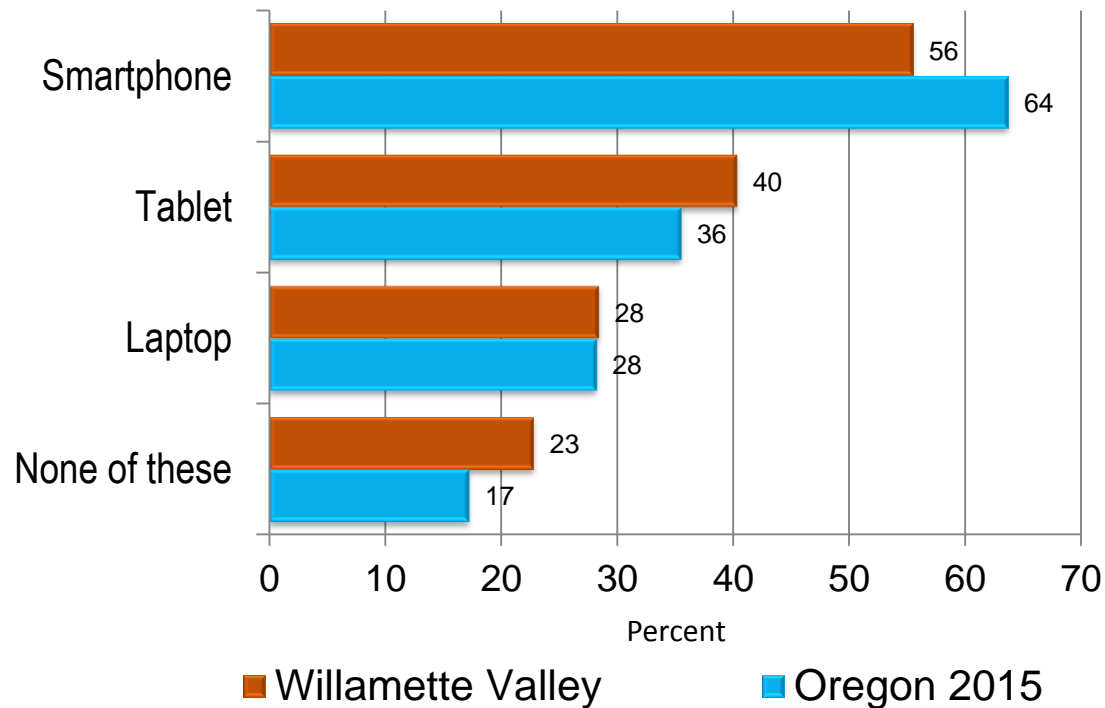


\*New in 2015, data is from 2015 only

# Devices Used During Trip\*



Base: Overnight Marketable Person-Trips



\*New in 2015, data is from 2015 only

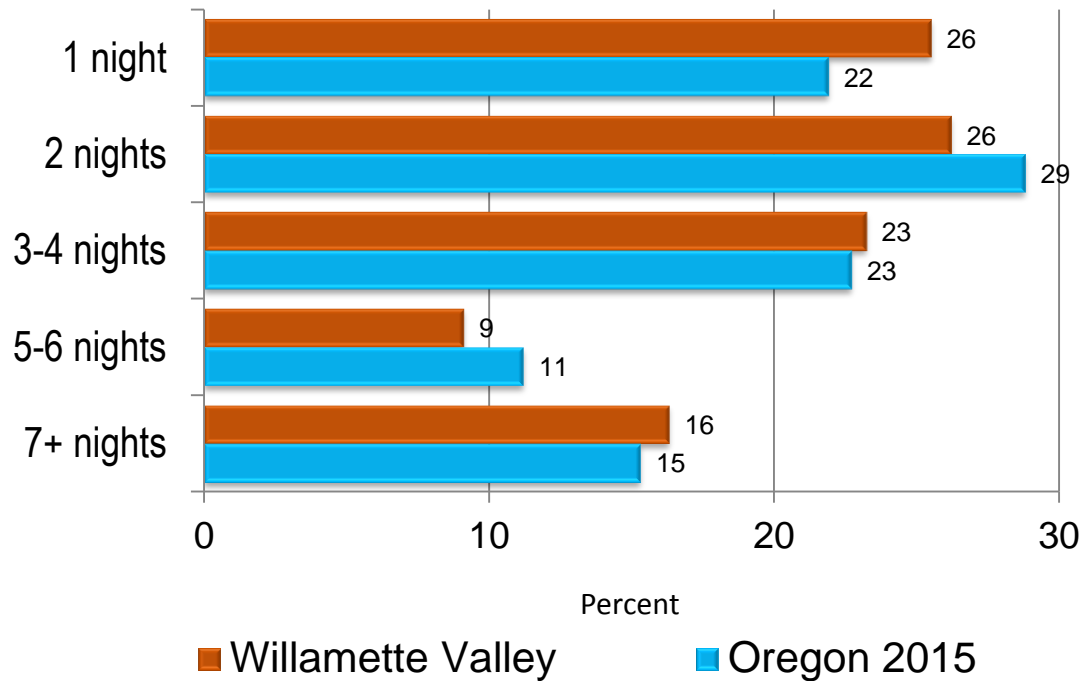
# Total Nights Away on Trip



Base: Overnight Marketable Person-Trips

**Average  
Willamette Valley Region  
= 4.0 Nights**

**Average  
Oregon  
= 4.3 Nights**

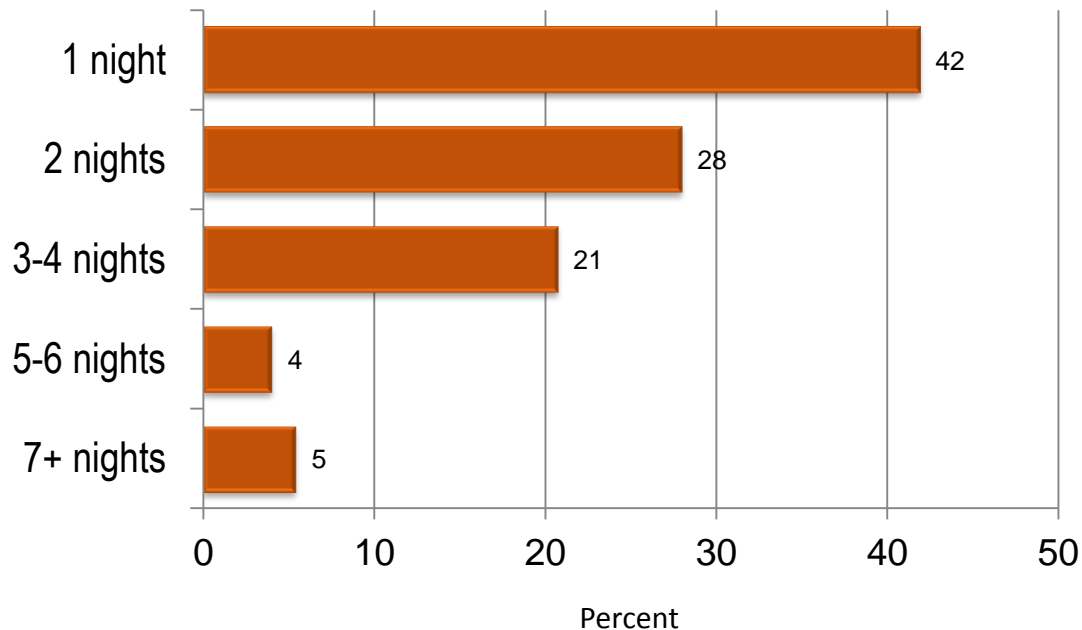


# Number of Nights Spent in the Willamette Valley Region



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

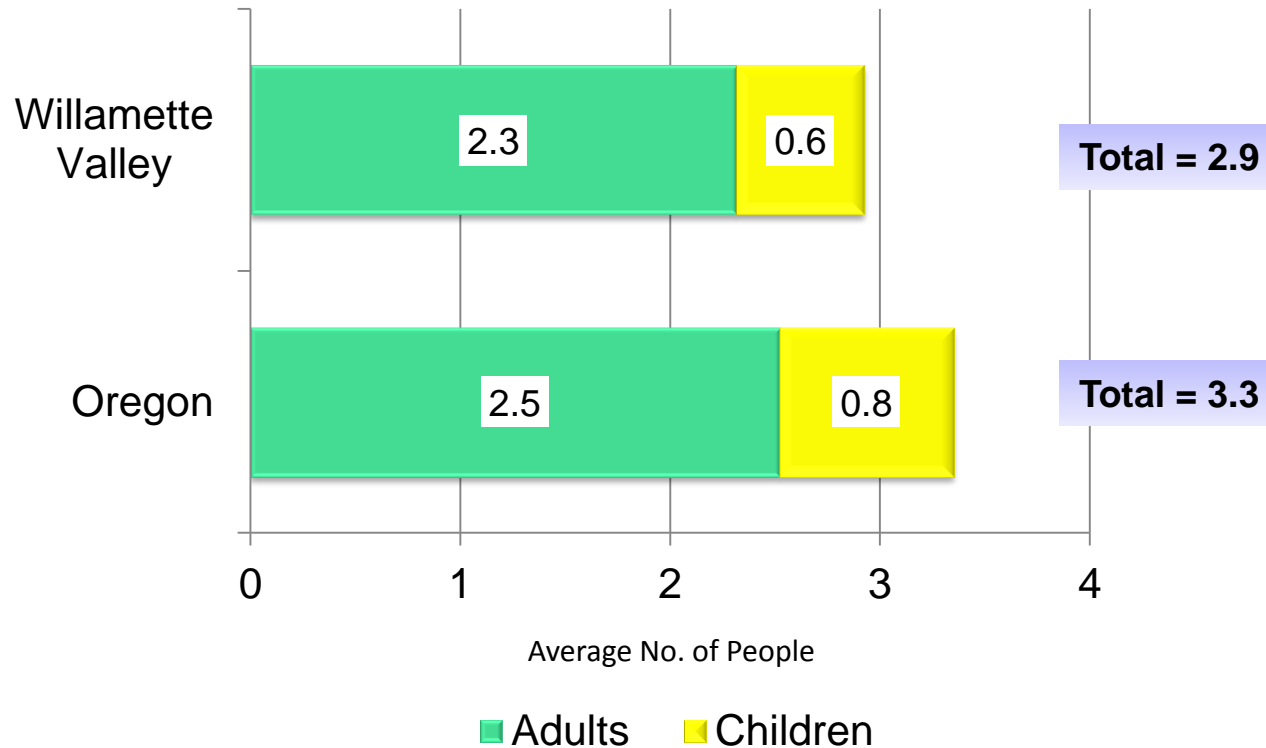
Average Nights Spent in the Willamette Valley Region = 2.4



# Size of Travel Party



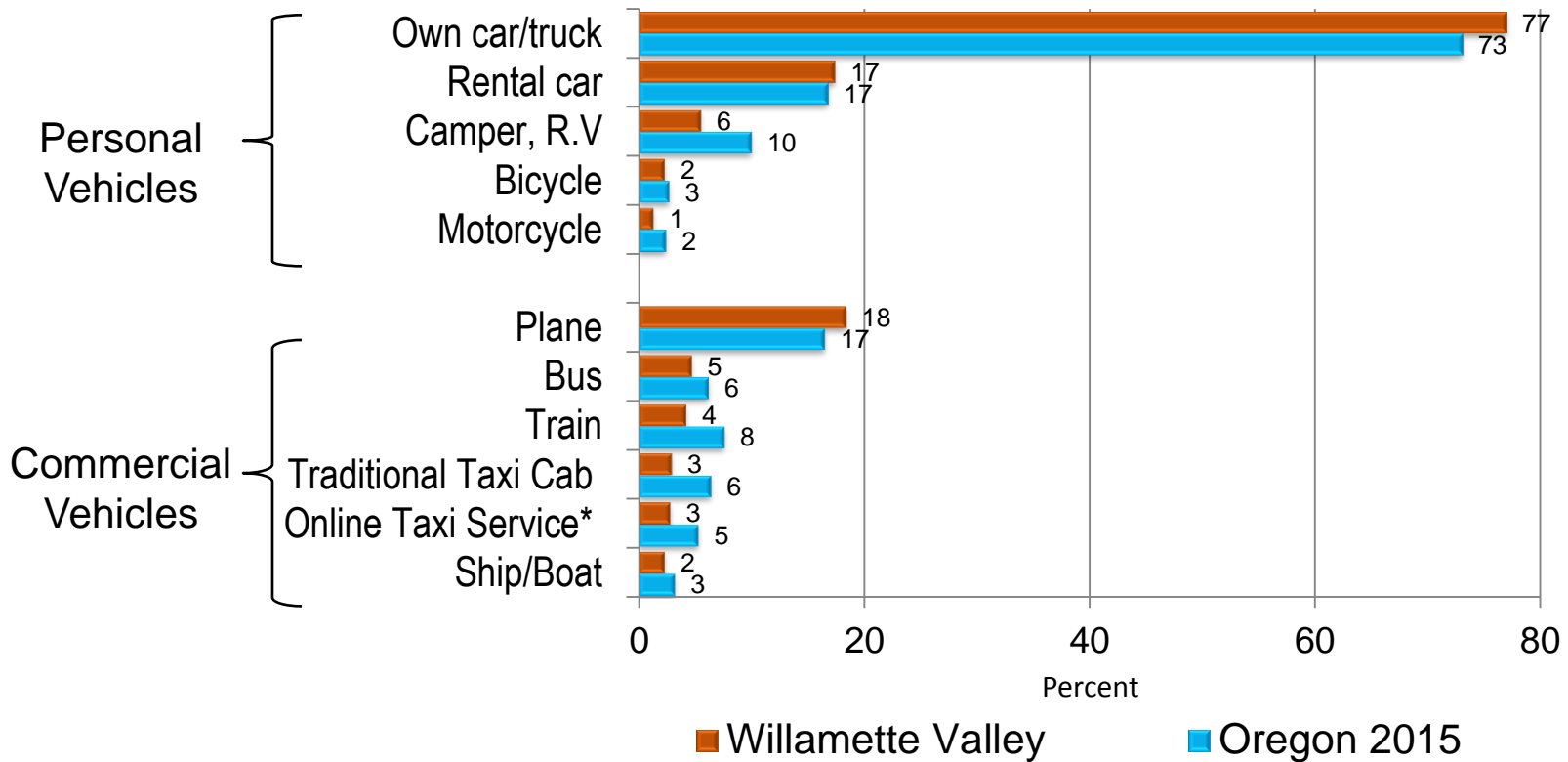
Base: Overnight Marketable Person-Trips



# Transportation



Base: Overnight Marketable Person-Trips

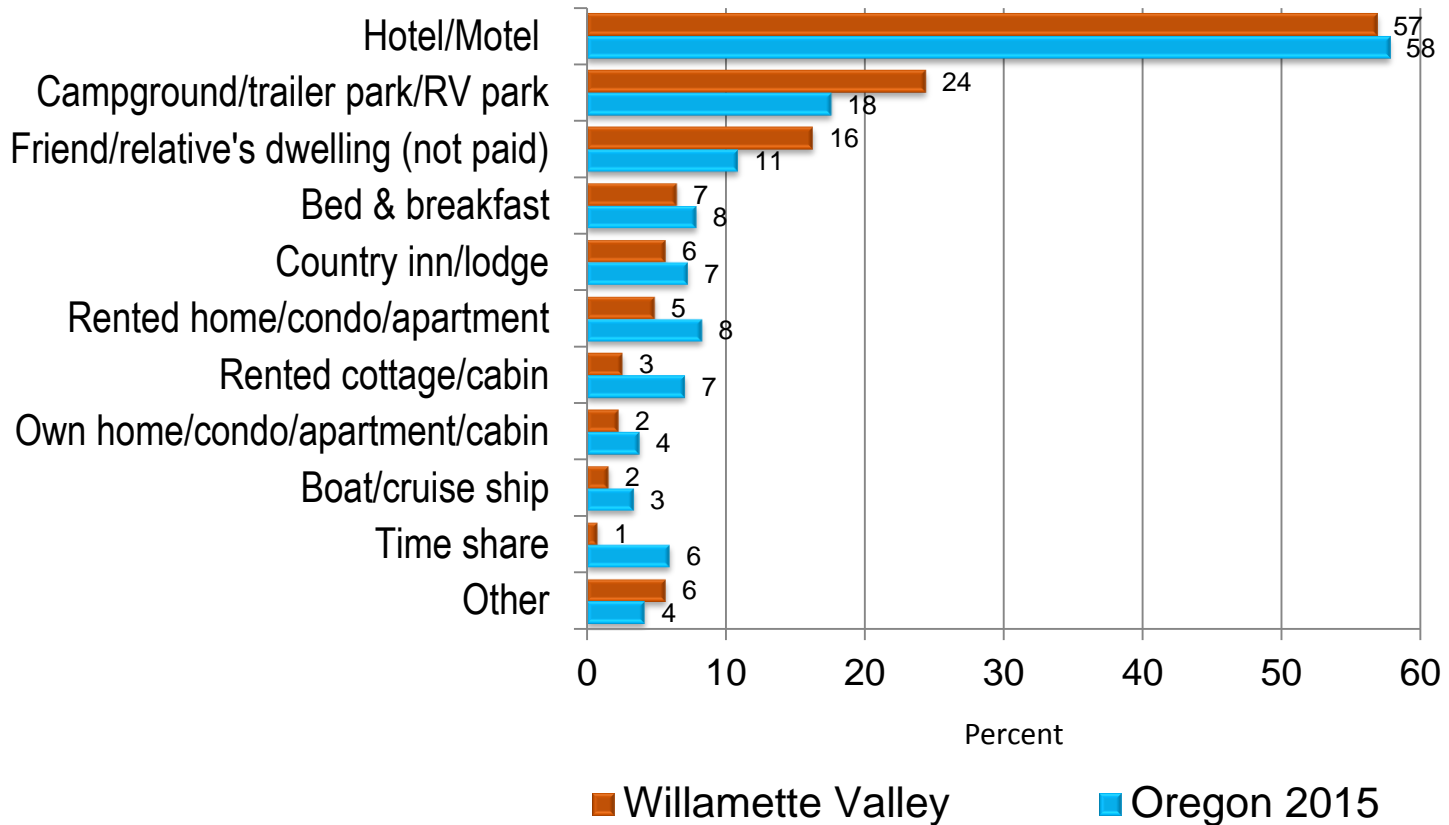


\*Category added in 2015, data is from 2015 only

# Accommodation



Base: Overnight Marketable Person-Trips

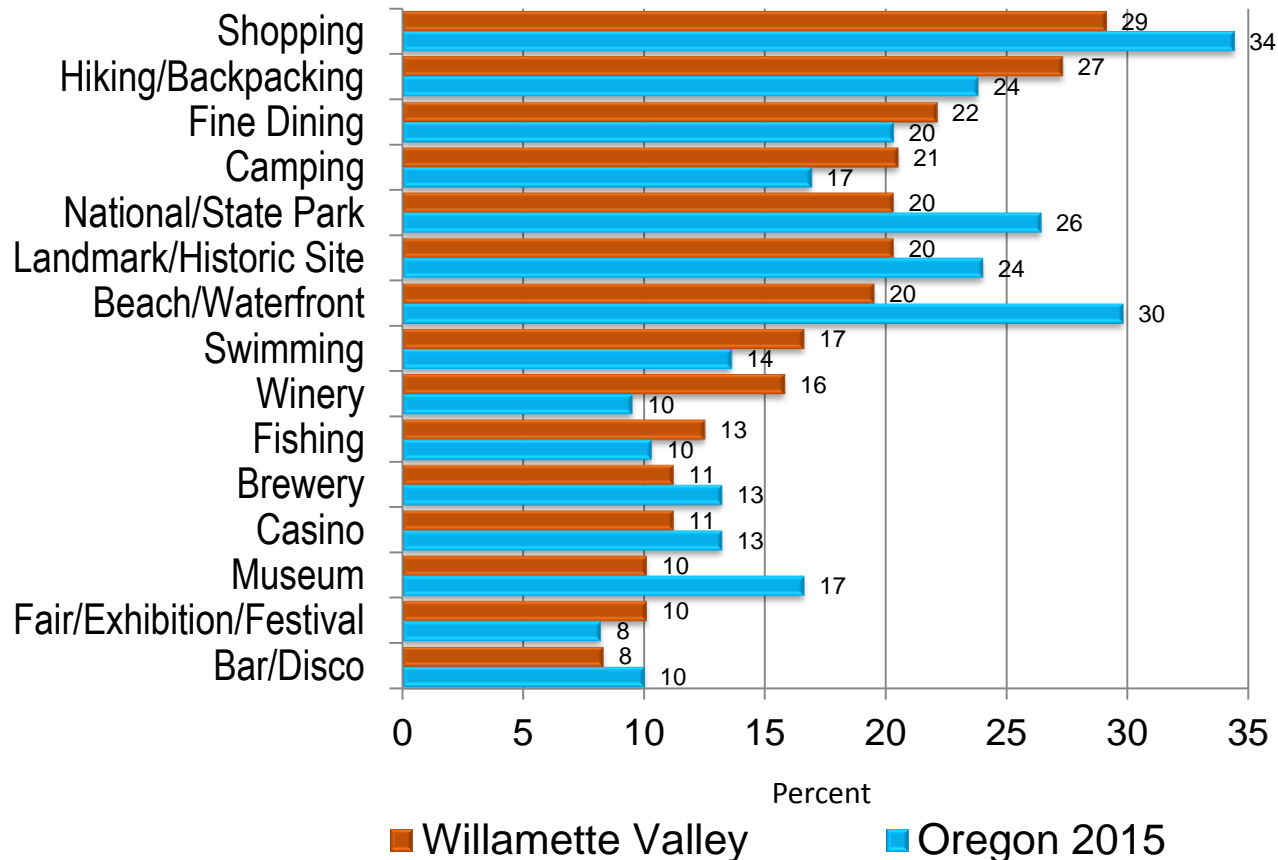




# Activities and Experiences



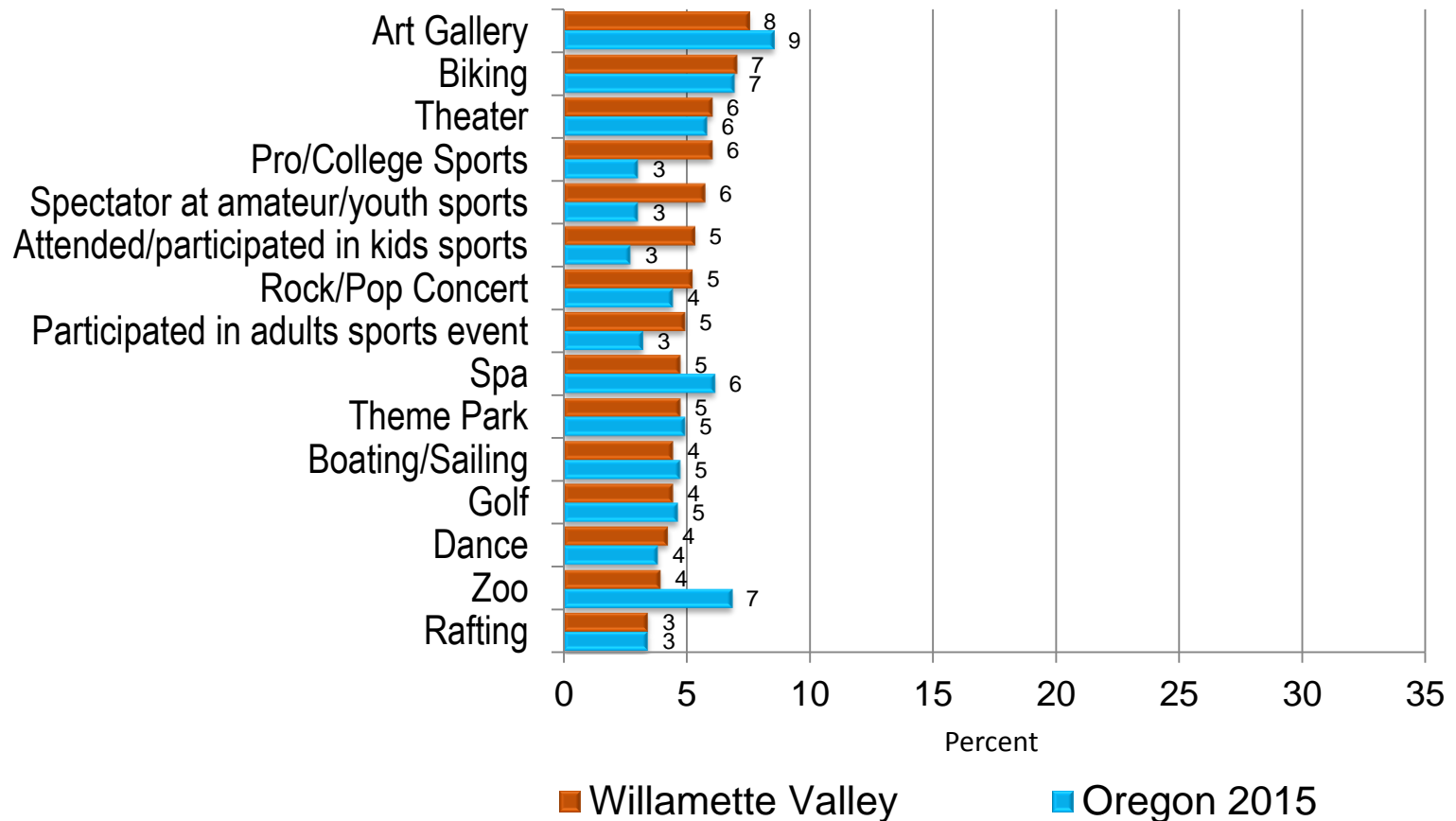
Base: Overnight Marketable Person-Trips



# Activities and Experiences (Cont'd)



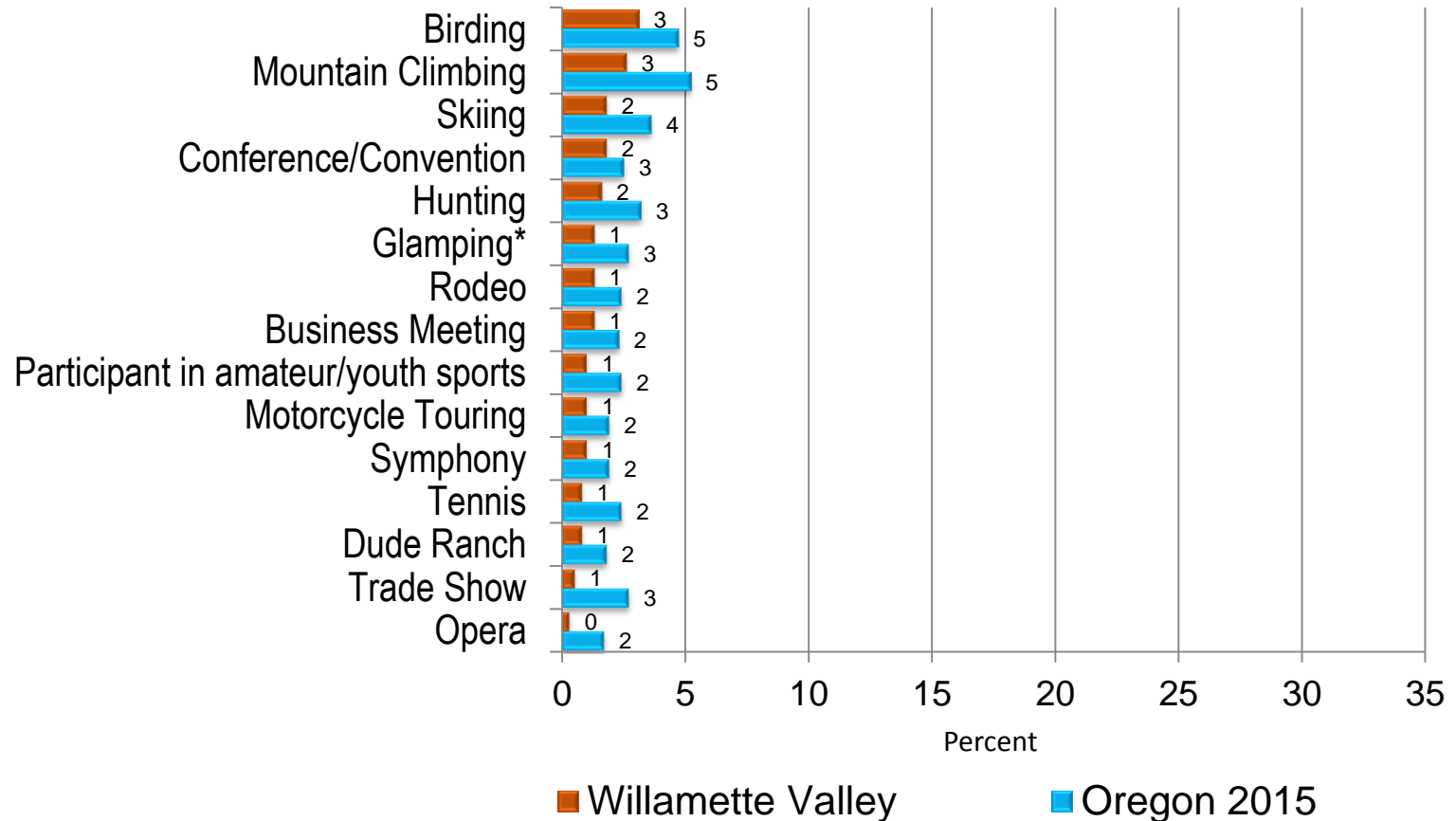
Base: Overnight Marketable Person-Trips



# Activities and Experiences (Cont'd)



Base: Overnight Marketable Person-Trips

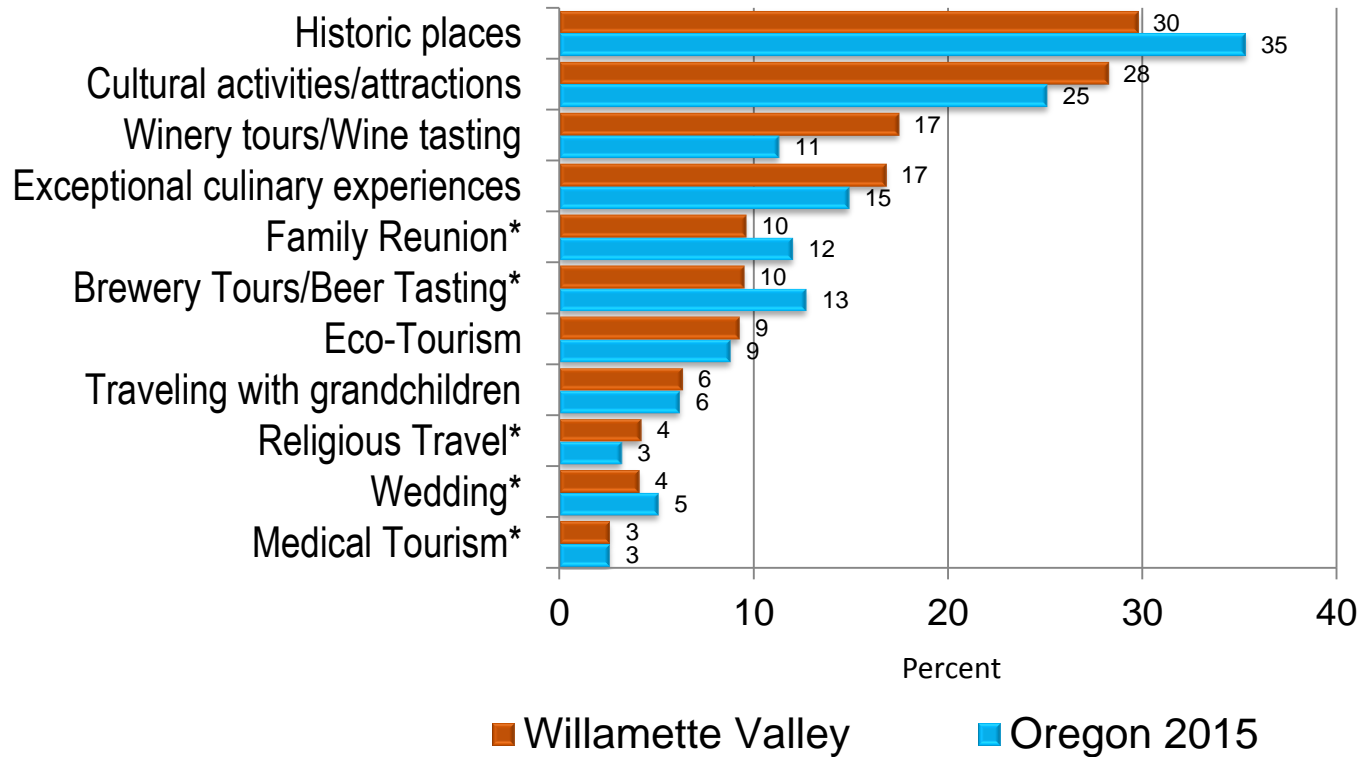


\*Category added in 2015, data is from 2015 only

# Activities of Special Interest



Base: Overnight Marketable Person-Trips

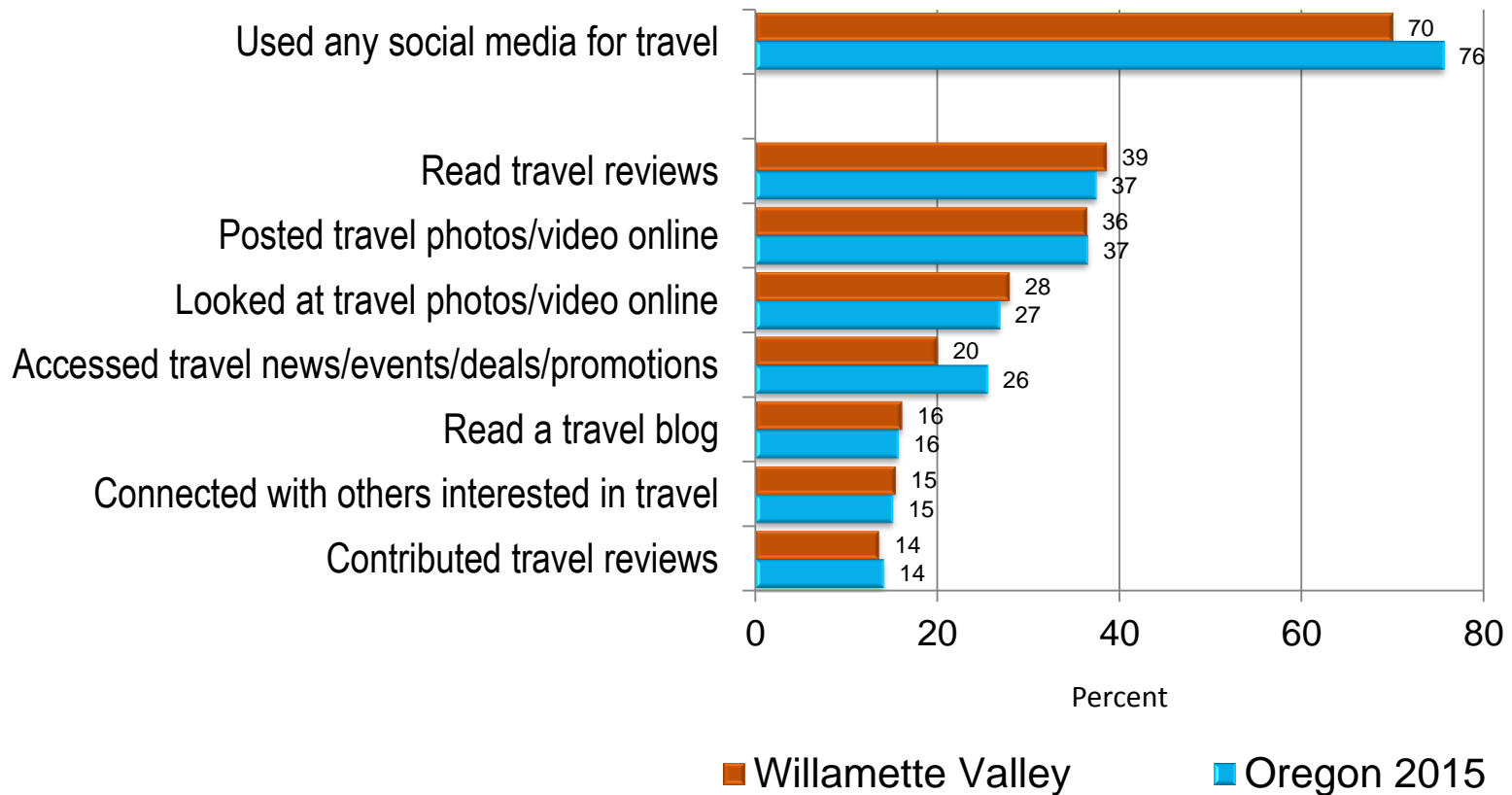


\*Category added in 2015, data is from 2015 only

# Online Social Media Use by Travelers



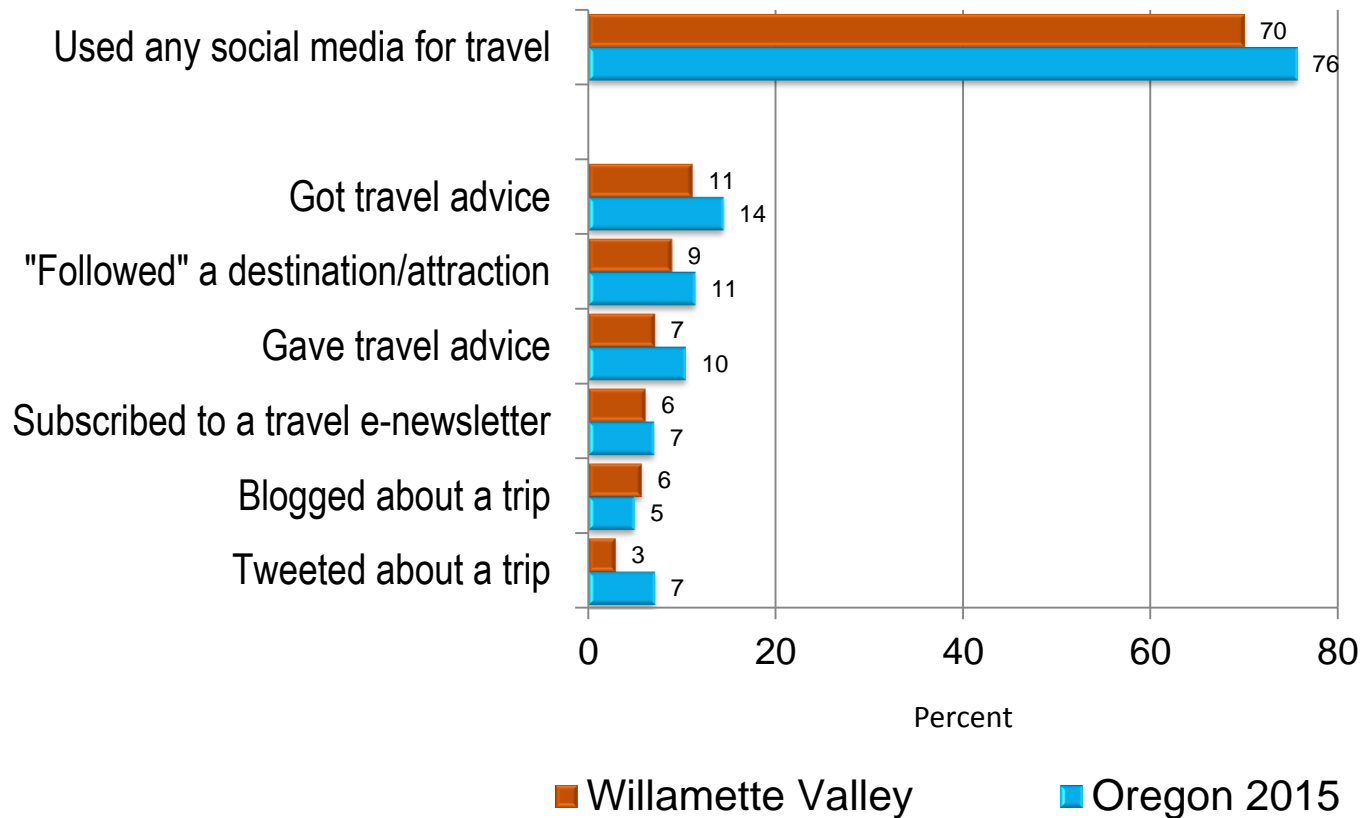
Base: Overnight Marketable Person-Trips



# Online Social Media Use by Travelers (Cont'd)



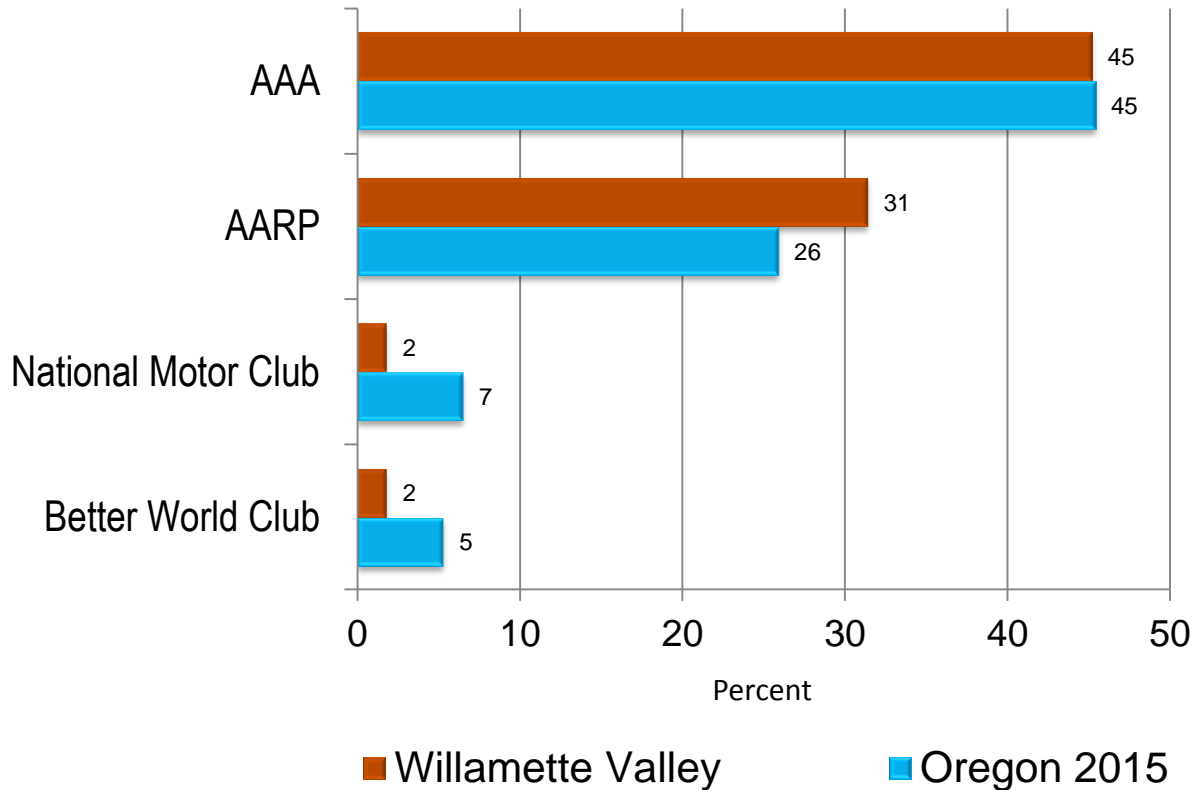
Base: Overnight Marketable Person-Trips



# Organization Membership



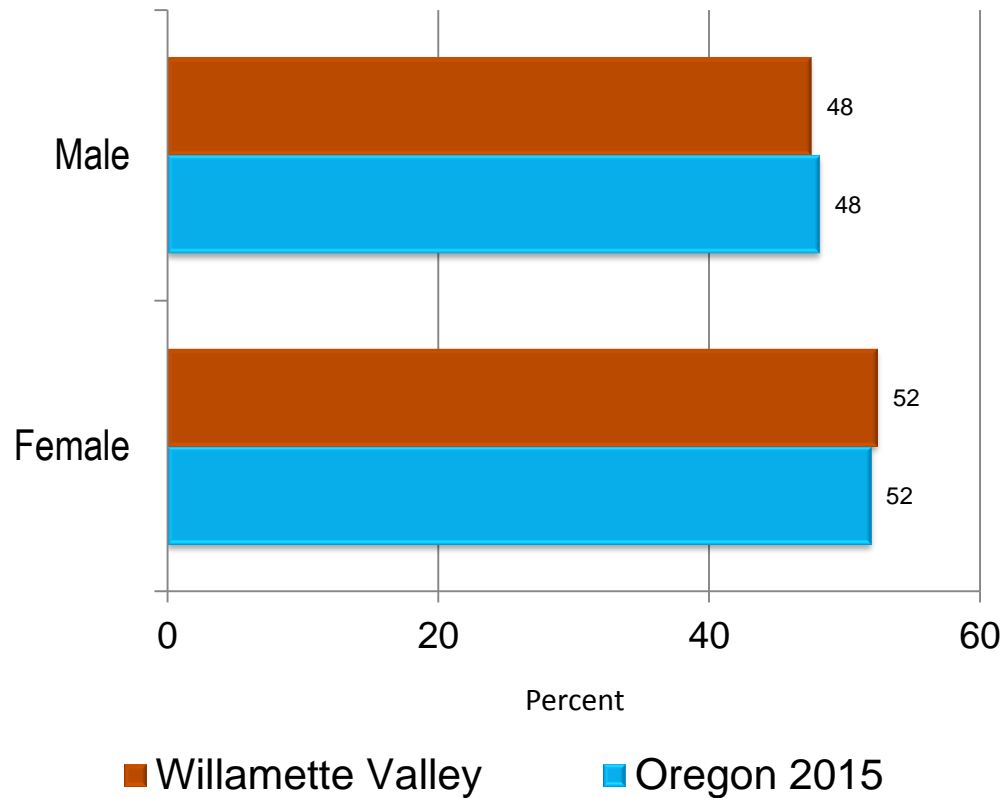
Base: Overnight Marketable Person-Trips



# Gender



Base: Overnight Marketable Person-Trips

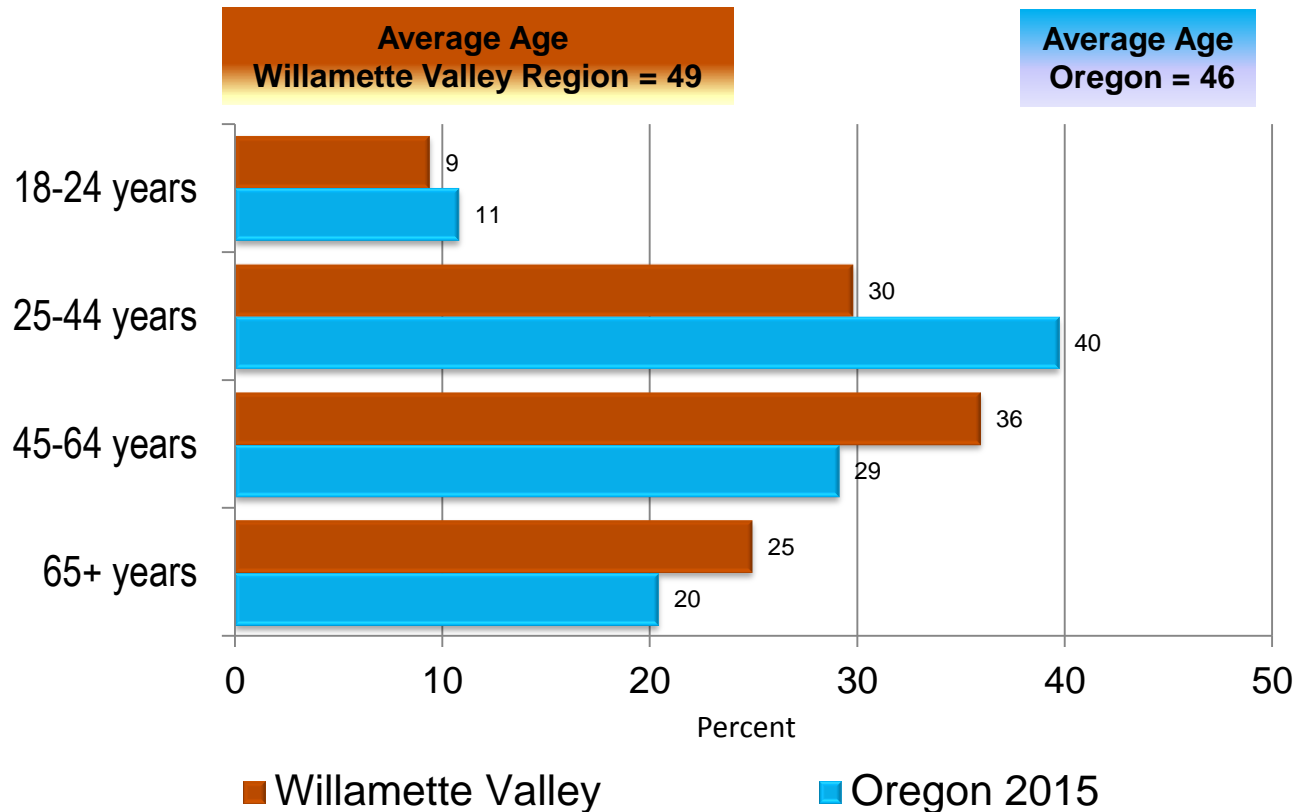




# Age



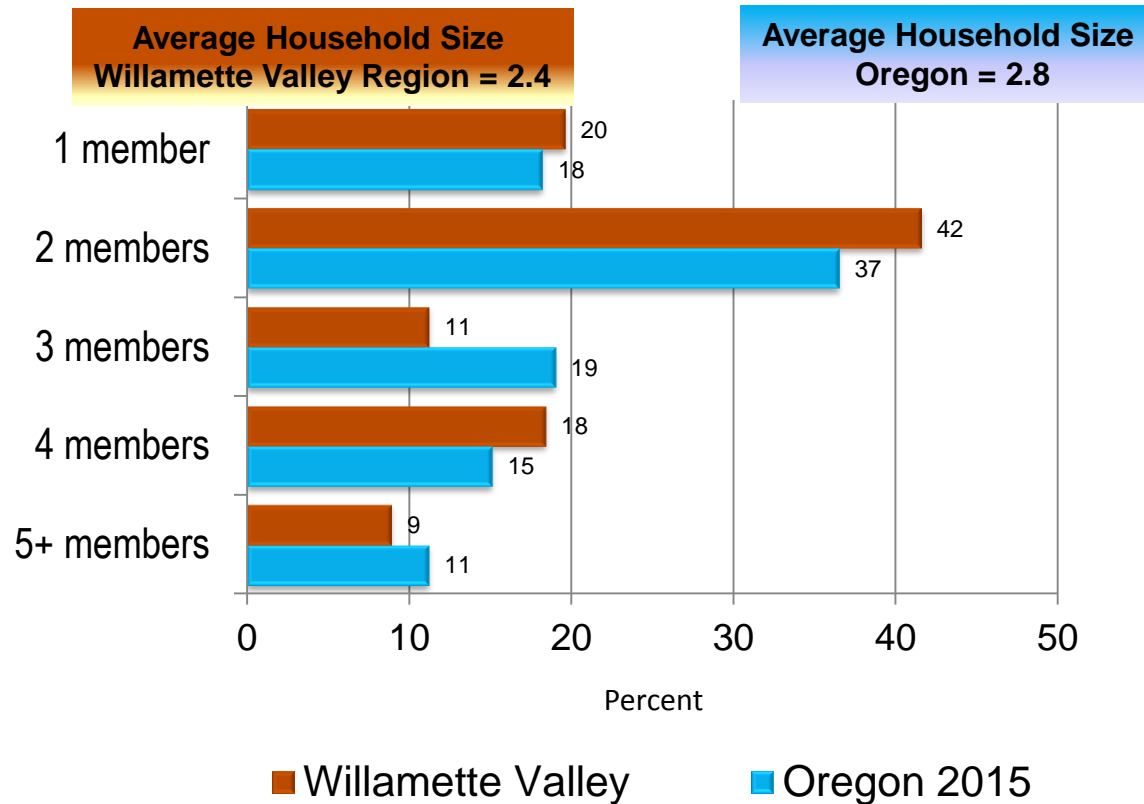
Base: Overnight Marketable Person-Trips



# Household Size



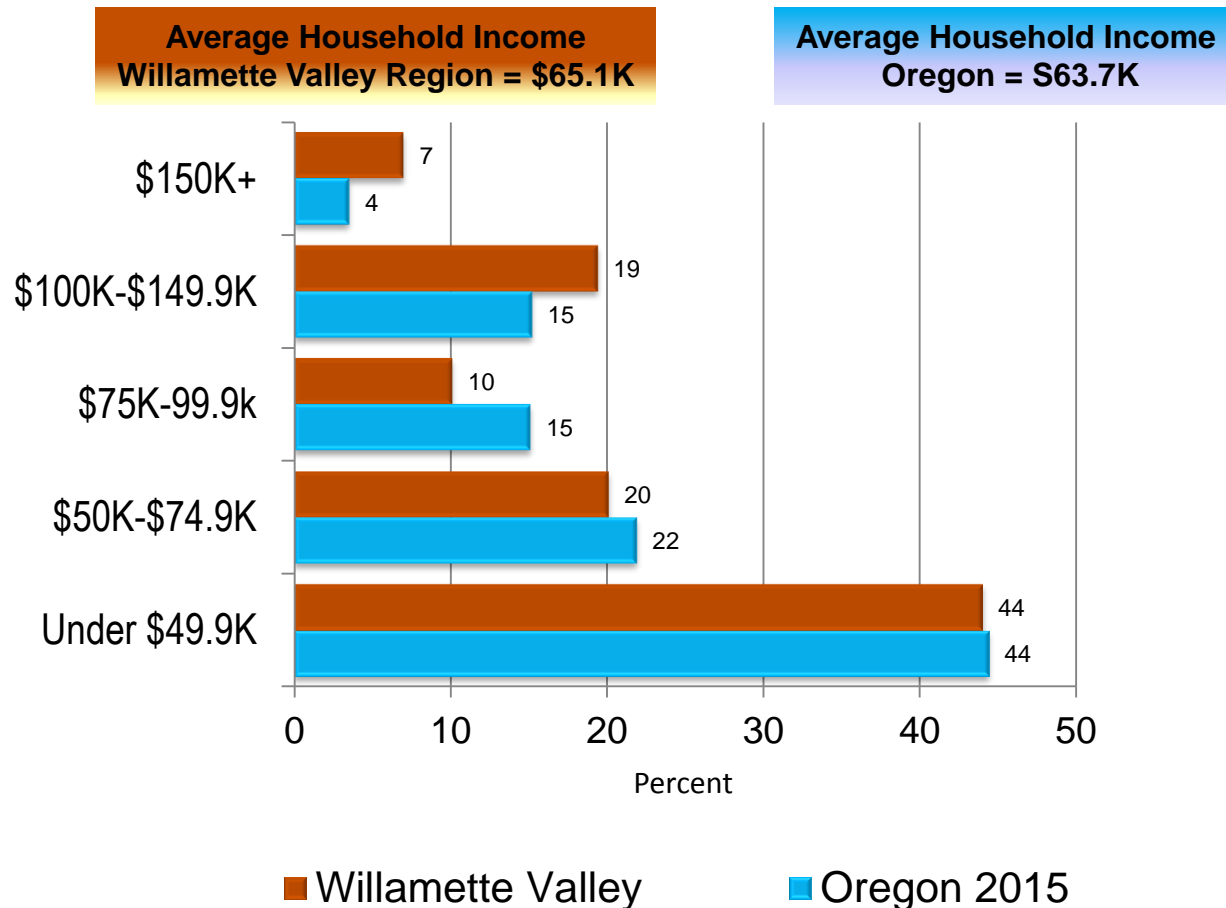
Base: Overnight Marketable Person-Trips



# Household Income



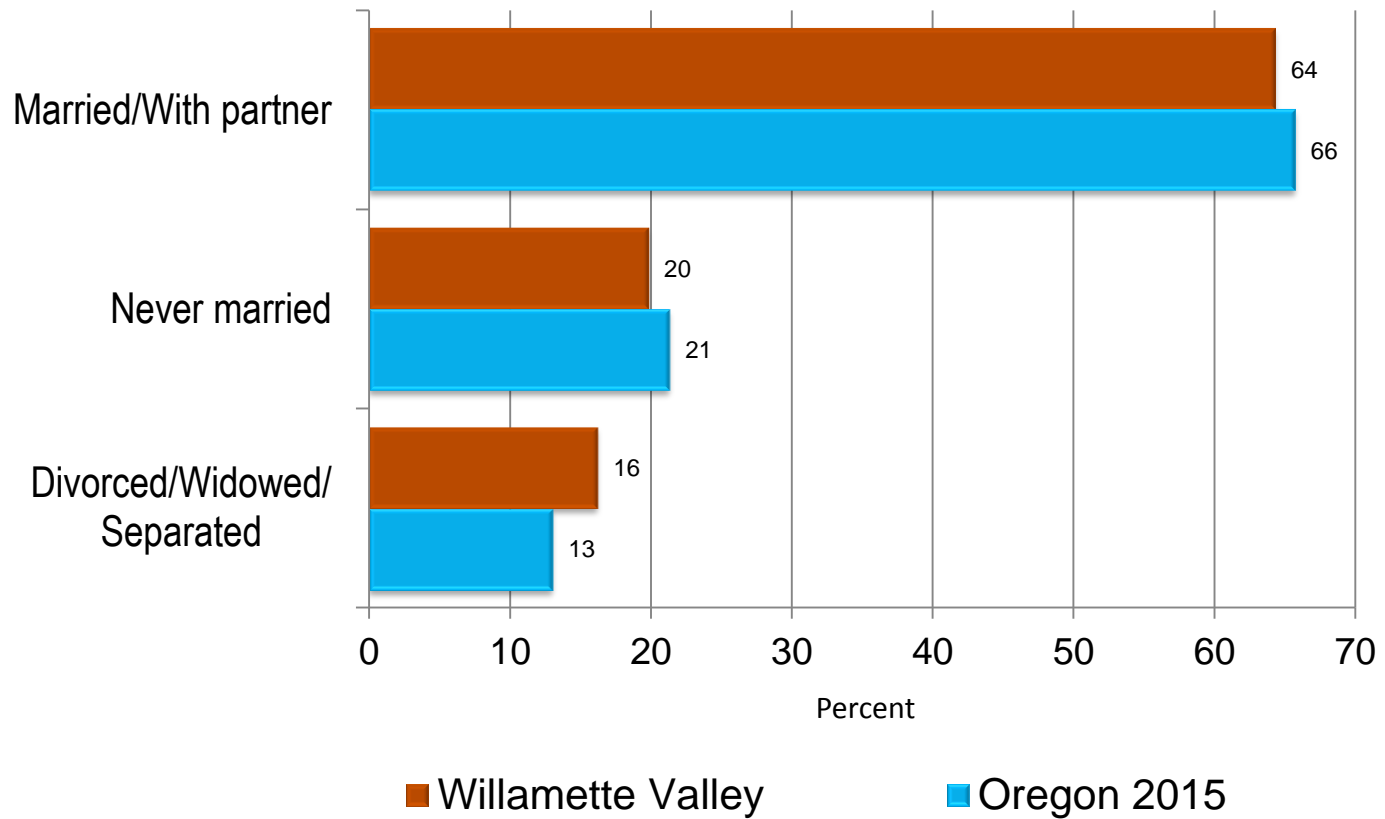
Base: Overnight Marketable Person-Trips



# Marital Status



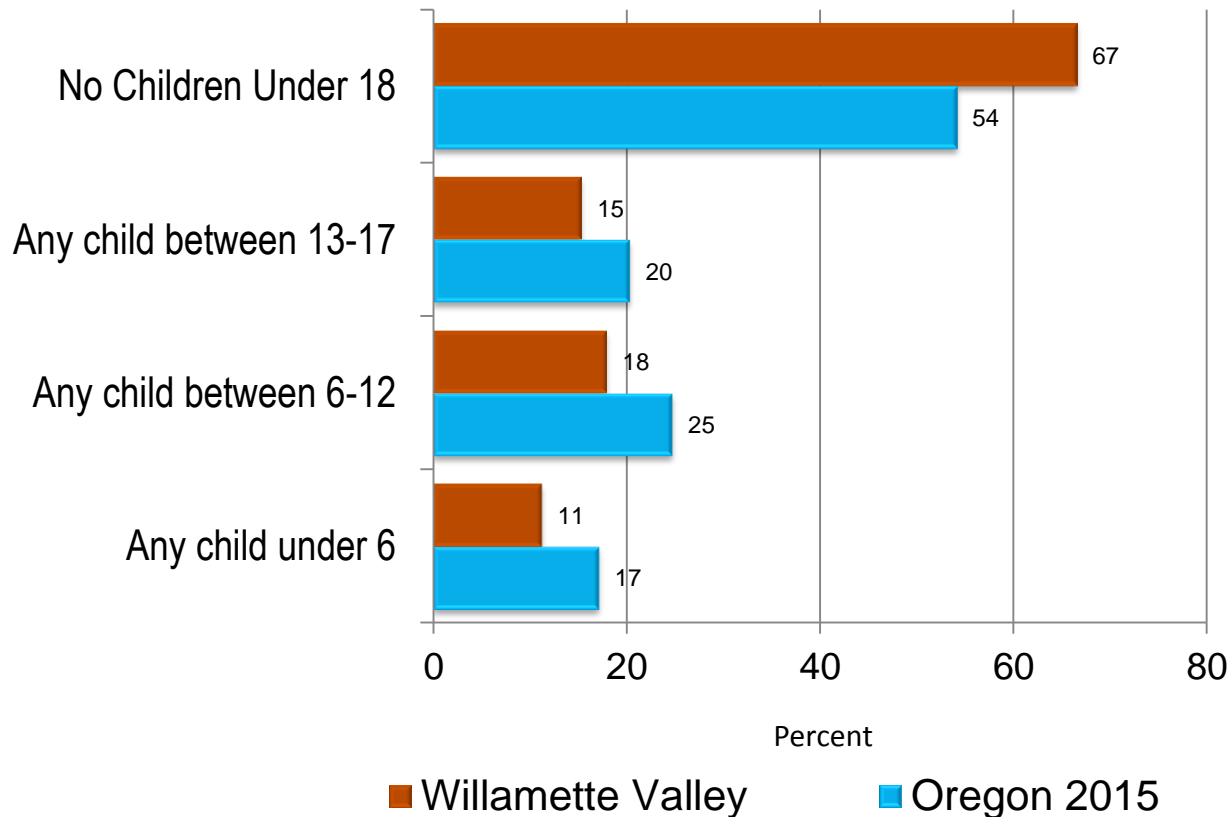
Base: Overnight Marketable Person-Trips



# Children in Household



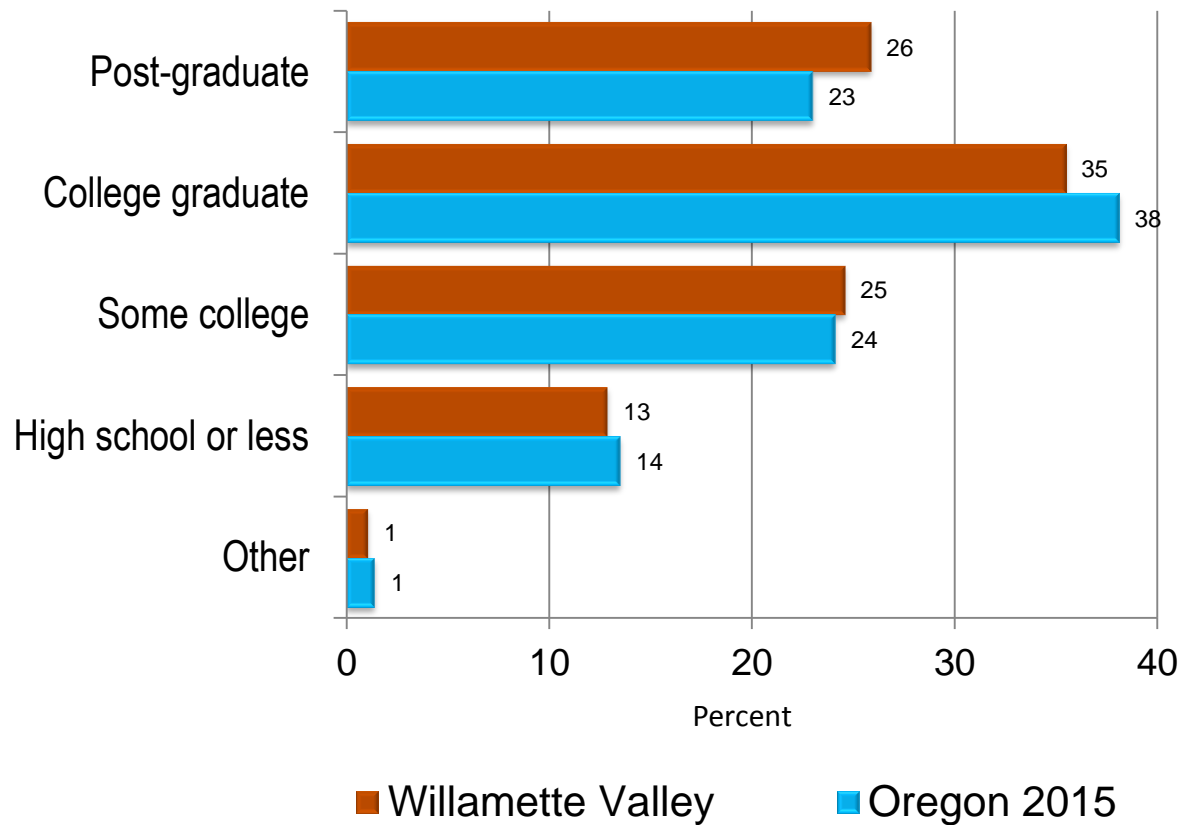
Base: Overnight Marketable Person-Trips



# Education



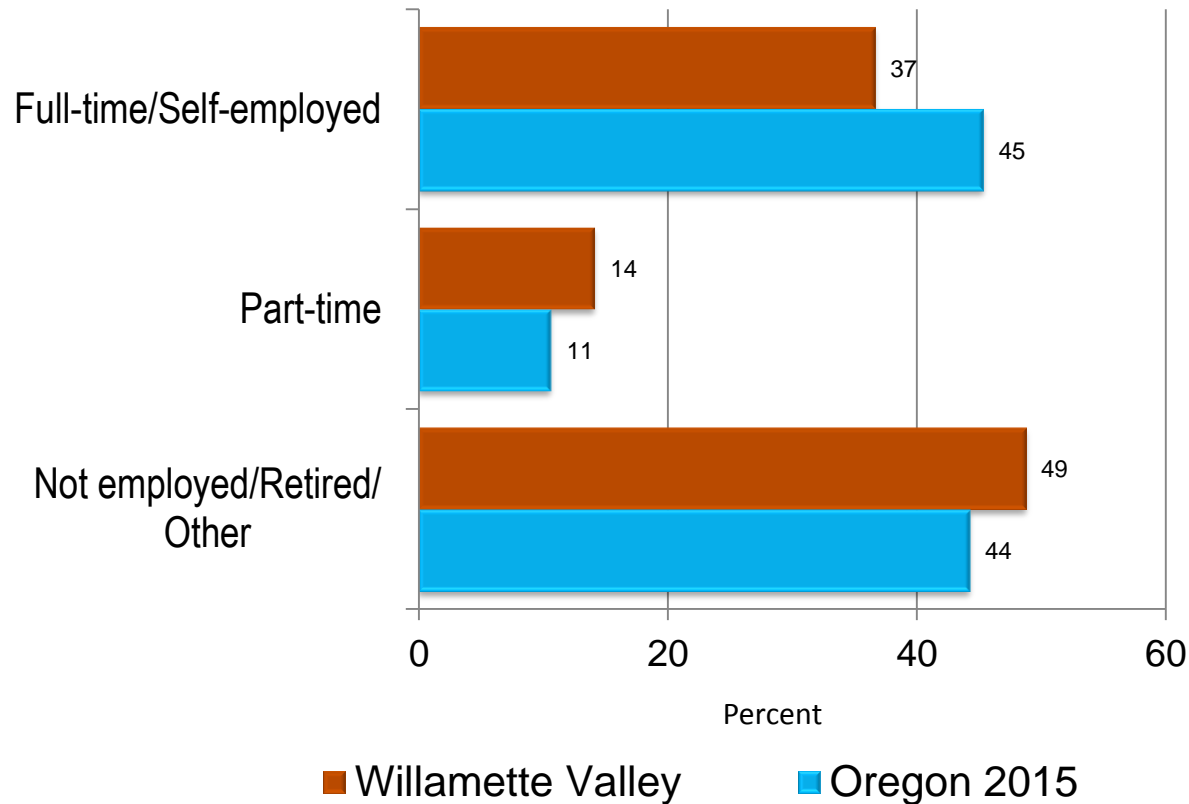
Base: Overnight Marketable Person-Trips



# Employment



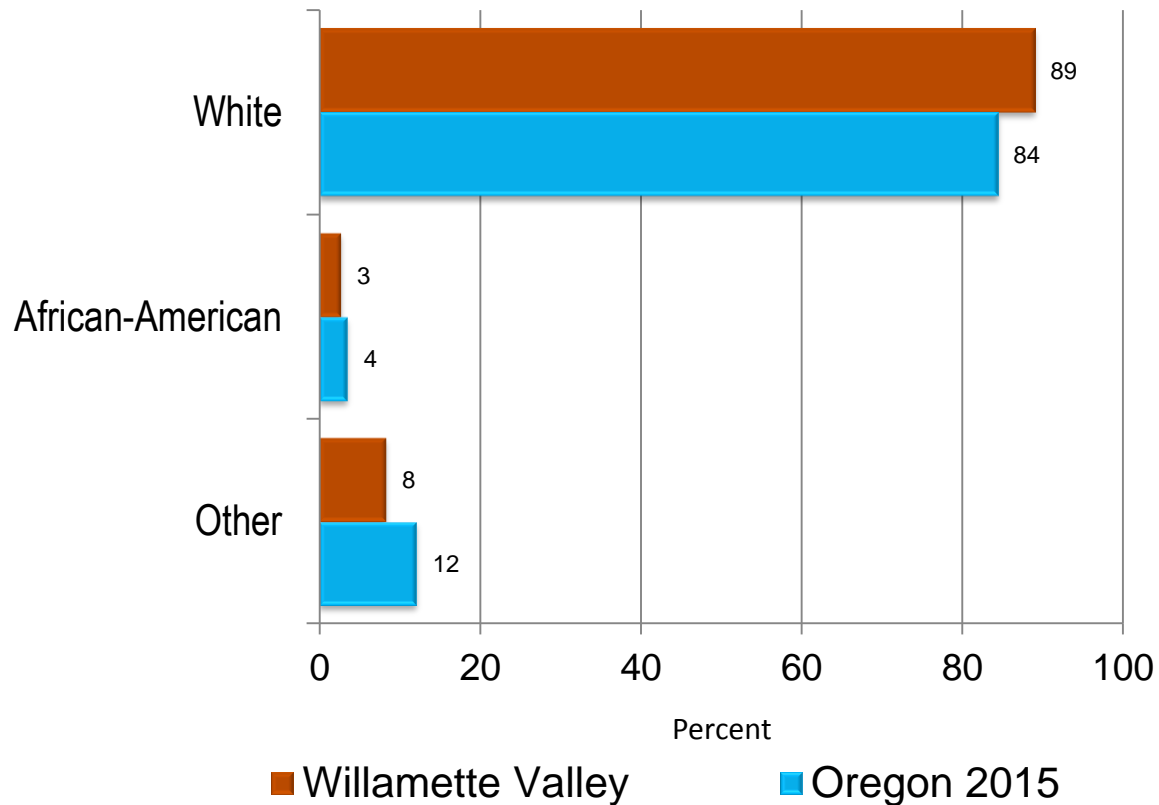
Base: Overnight Marketable Person-Trips



# Race



Base: Overnight Marketable Person-Trips

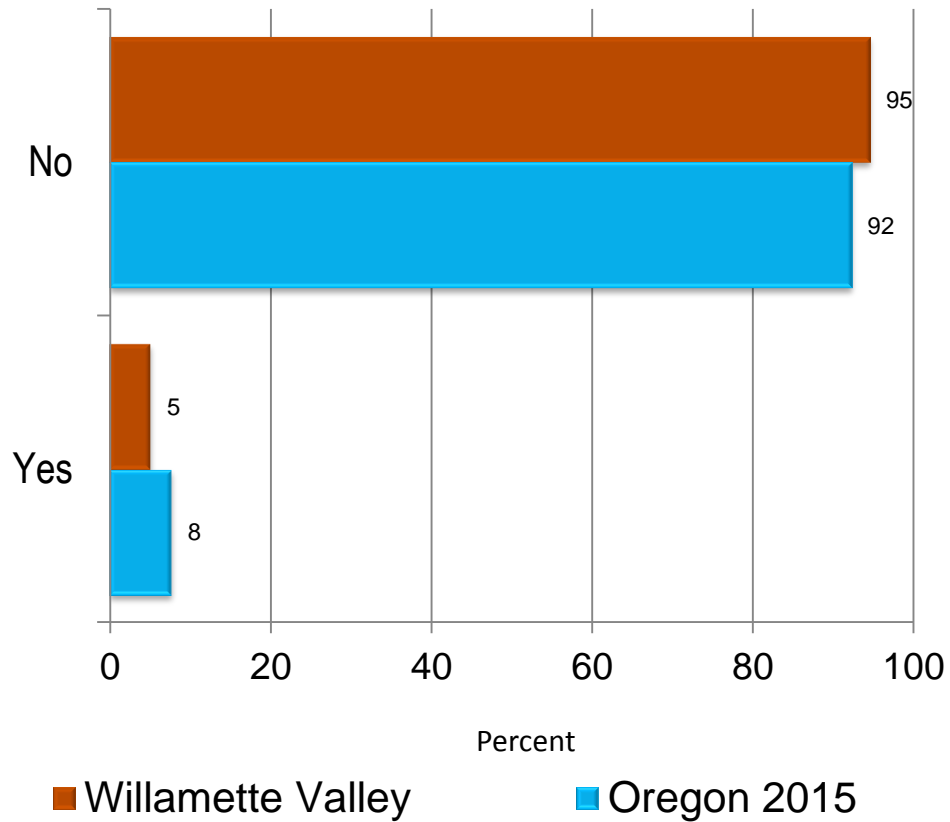




# Hispanic Background



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



## Total Trips = Leisure + Business + 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