



**Regional Analysis from  
The 2004/2006 Oregon Visitor Studies**

**September 2007**

# Background



- Longwoods International was commissioned by the State of Oregon to conduct research into the size and structure of the overnight visitor market for Oregon in total and for each of the state's 7 travel regions.
- This report provides:
  - *estimates of overnight visitor volume to Oregon State and to the Willamette Valley Region in particular*
  - *strategic intelligence on the Willamette Valley Region's:*
    - *key sources of travel business*
    - *visitor profile and trip characteristics*
    - *visitor imagery of Oregon*

# Methodology



- For each of the 2004 and 2006 travel years, a representative sample of Oregon visitors was identified through **Travel USA®**, Longwoods' annual syndicated survey of the U.S. travel market.
- **Travel USA®** contacts 200,000 U.S. households annually.
  - *The households are members of a major consumer mail panel which is balanced statistically to be representative of the U.S. in terms of key demographic characteristics.*
- Respondents were asked which of Oregon's 7 regions was their main destination and which they spent time in. For the 2 travel years combined:
  - *a total of 435 respondents **spent time** in the **Willamette Valley Region** and 246 indicated that it was their **main destination***
  - *403 respondents traveled to the region on a **pleasure trip**, 176 of whom were **marketable visitors**.*

# Analytical Note



- The results reported in this study are based on 2 time frames:
  - *Market size and structure estimates are reported for the most current year (2006), based on the robust annual **Travel USA®** sample*
  - *To maximize statistically reliability, other analytics (trip characteristics, visitor profiles and imagery) are based on the combined sample of Marketable visitors from the 2004 and 2006 studies.*

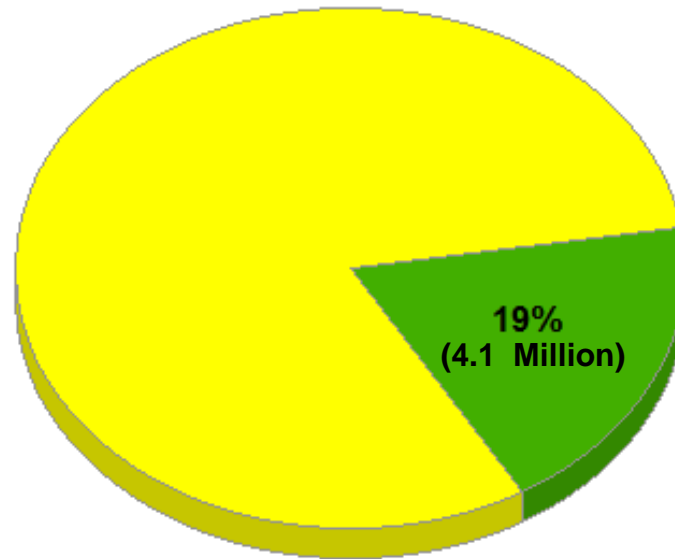
# **MAIN FINDINGS**

The Willamette Valley Region  
Travel Market Size and Structure  
— 2006

# Visitors to Oregon and the Willamette Valley Region in 2006



**Total Visitors to Oregon = 21.2 Million**

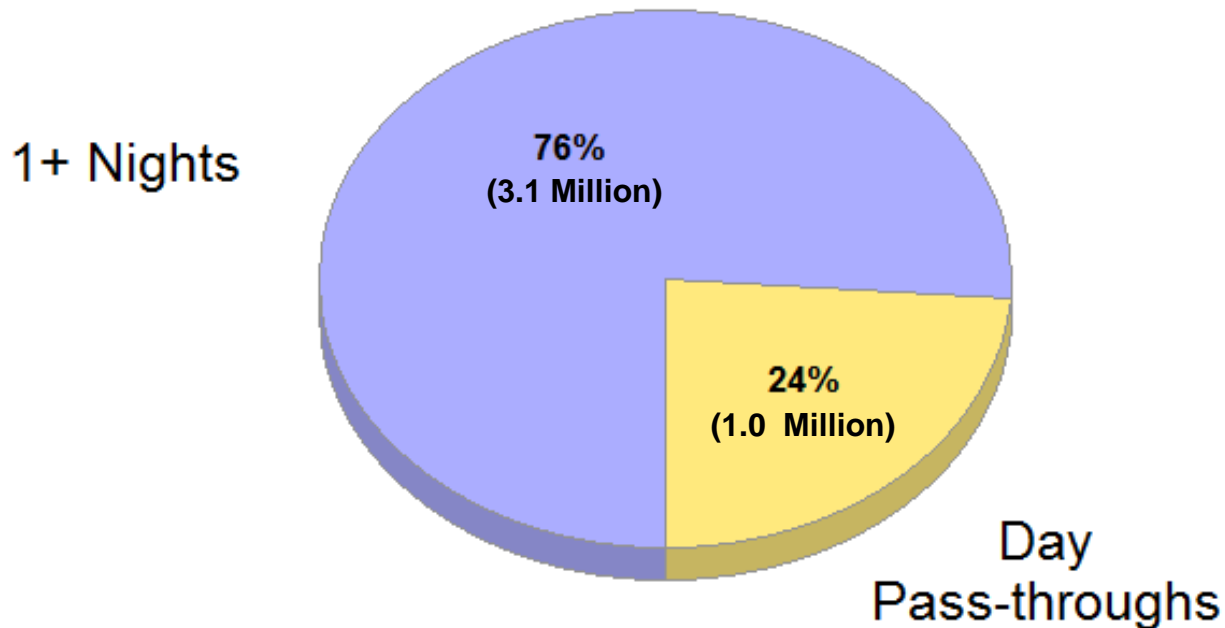


Spent Time in  
the Willamette  
Valley Region

# Length of Stay in the Willamette Valley Region



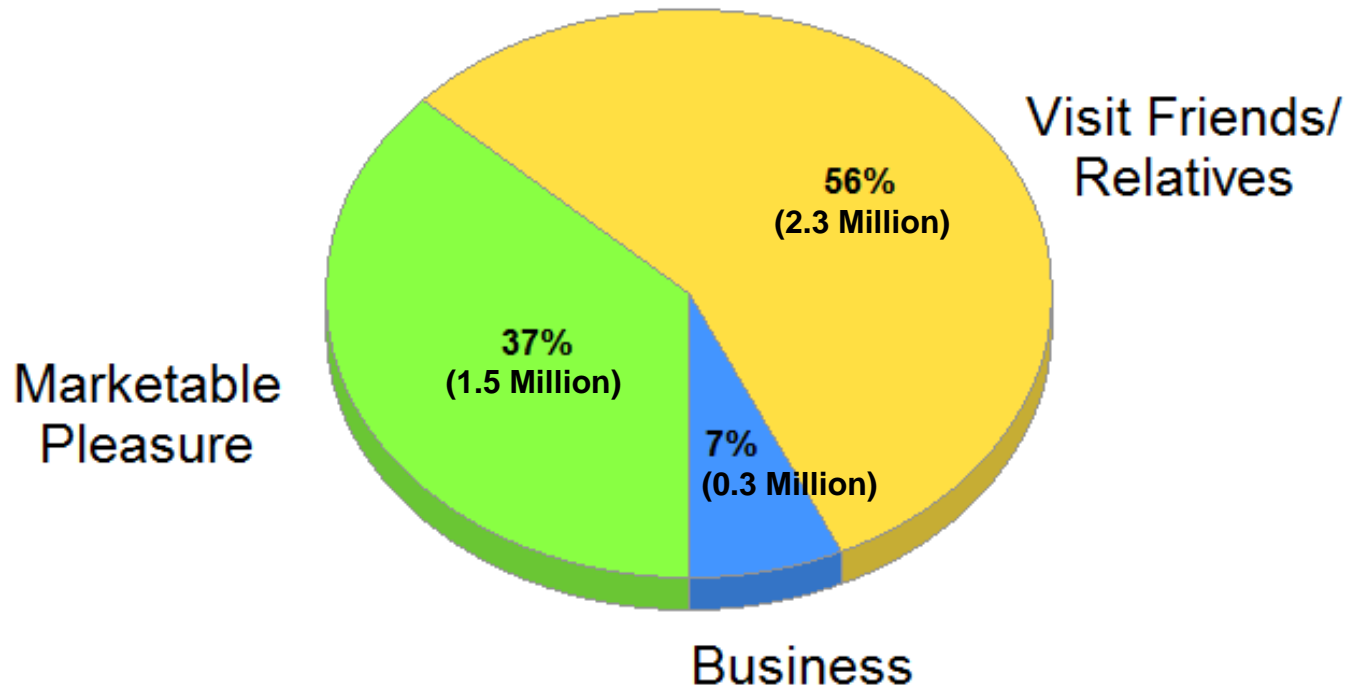
**Spent Time in the Willamette Valley Region = 4.1 Million**



# Purpose of Trips to the Willamette Valley Region

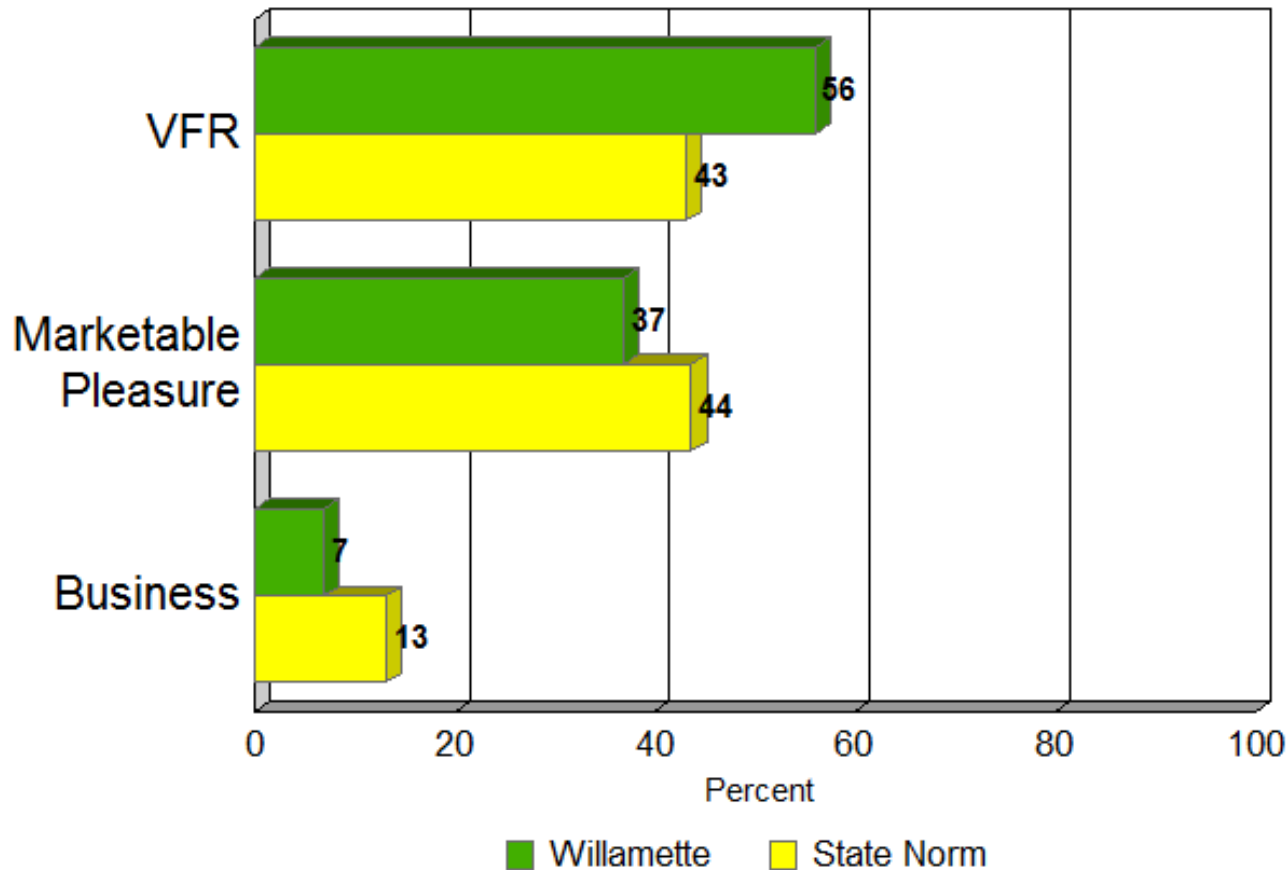


**Spent Time in the Willamette Valley Region = 4.1 Million**

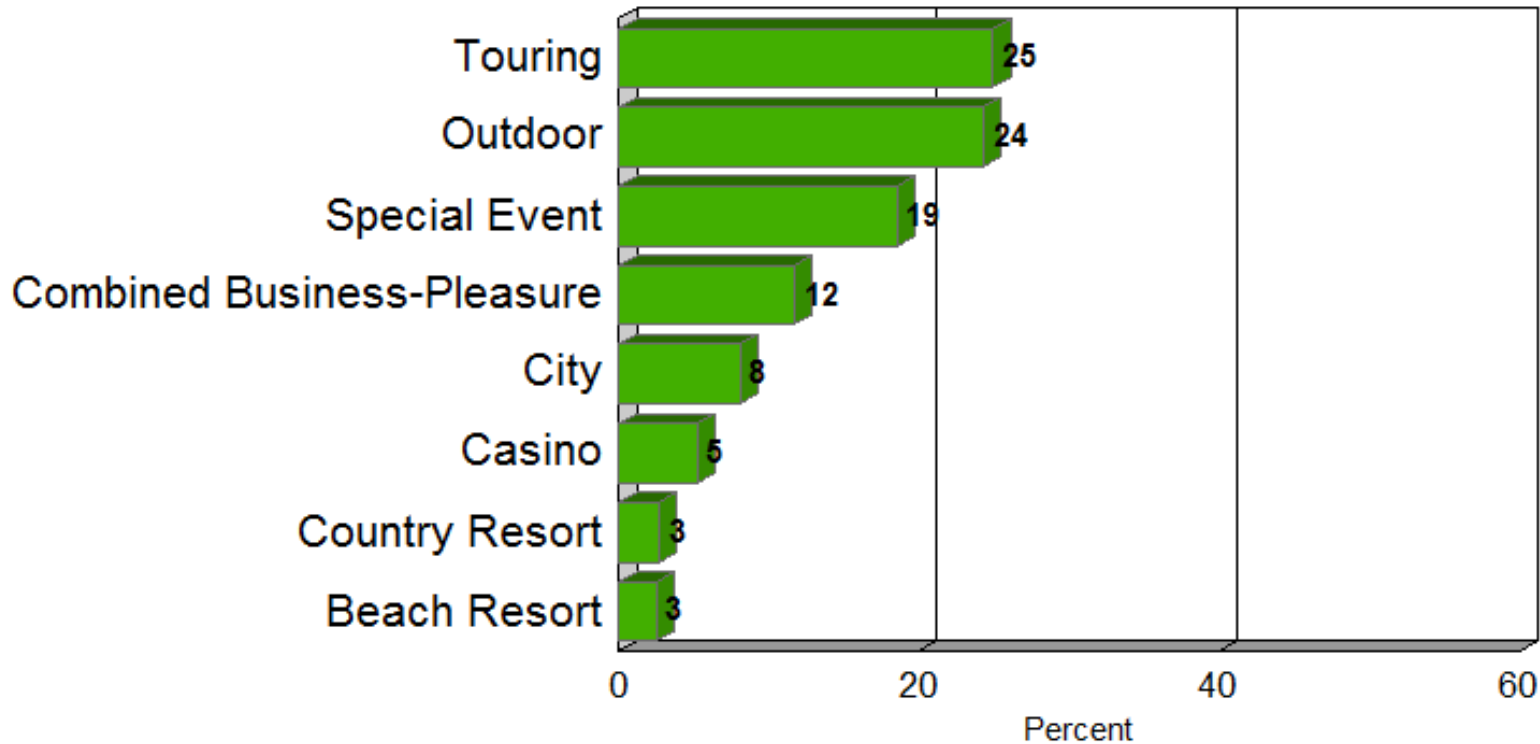


# Trips By Segment

— Willamette Valley Region vs. Oregon State



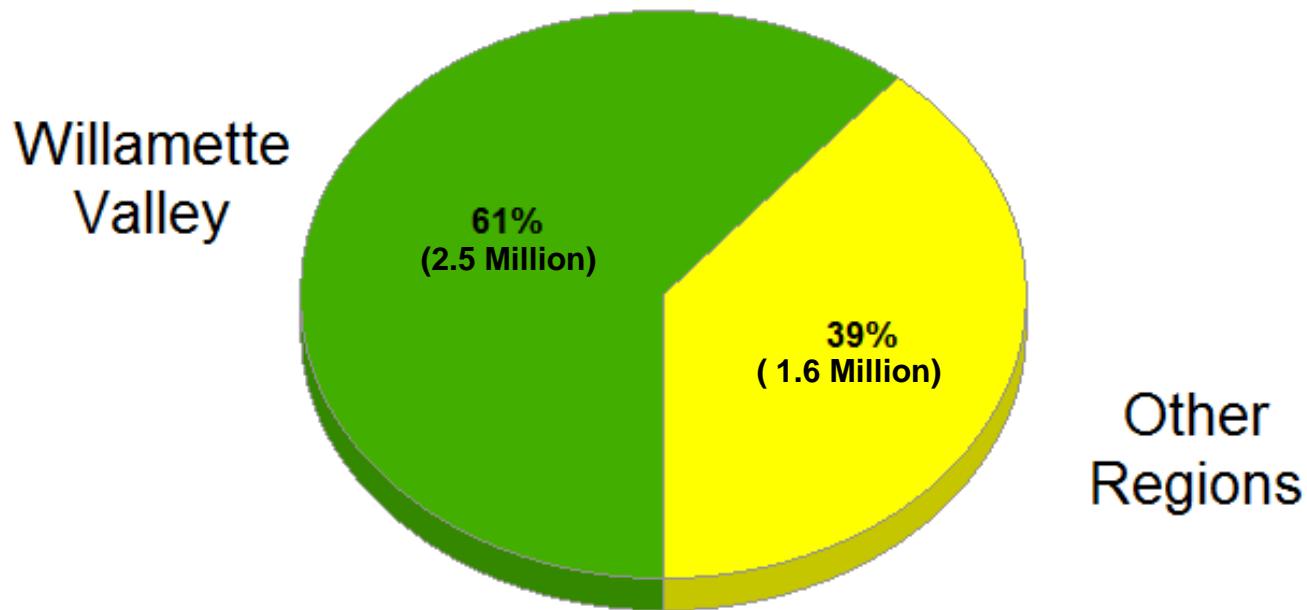
# The Willamette Valley Region's Marketable Trip Segments



# Main Destination of Travelers to the Willamette Valley Region



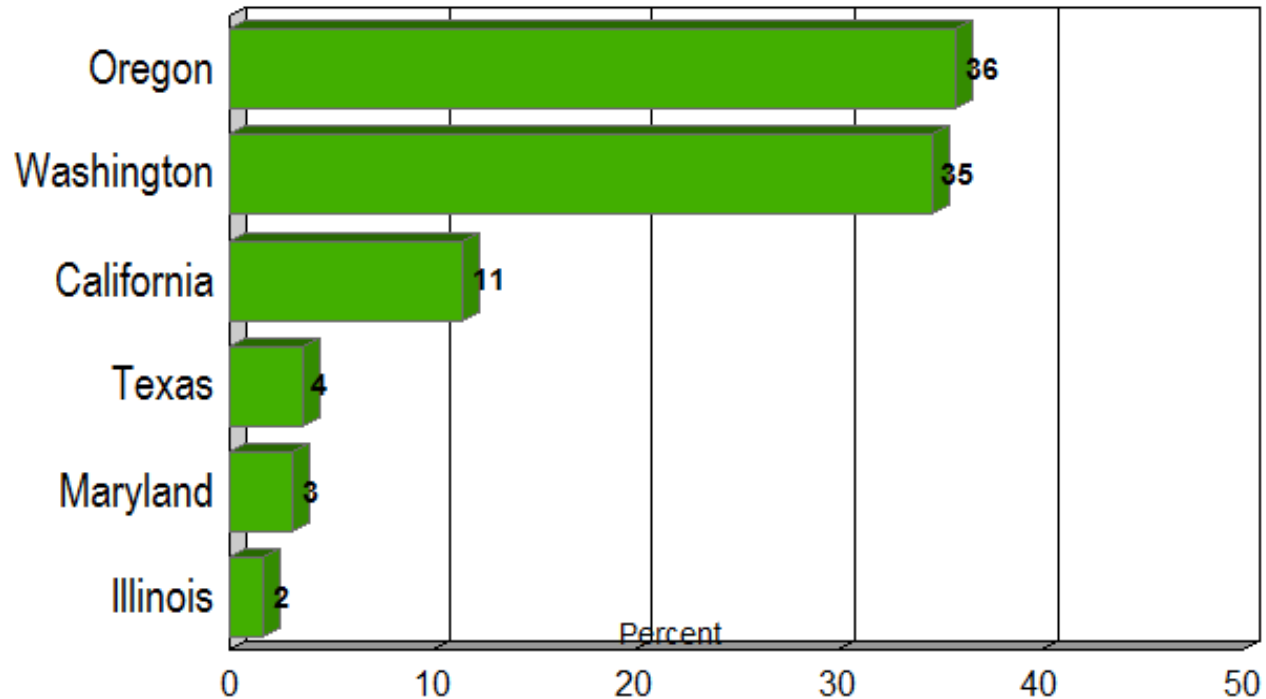
**Spent Time in the Willamette Valley Region = 4.1 Million**



# The Willamette Valley Region's State Sources of Business in 2006



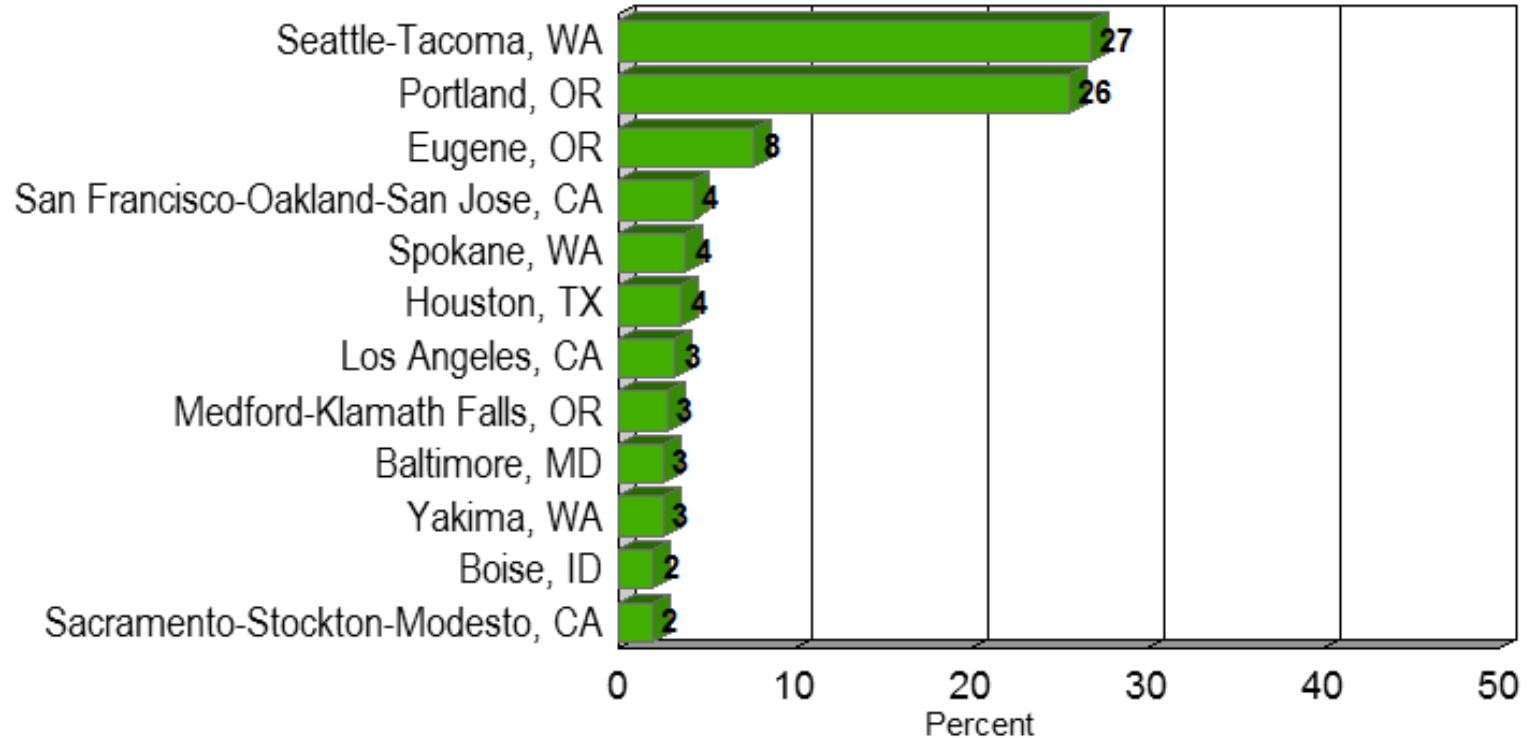
Base: Overnight Marketable Trips



# Urban Sources of Business - 2004/2006



Base: Overnight Marketable Trips



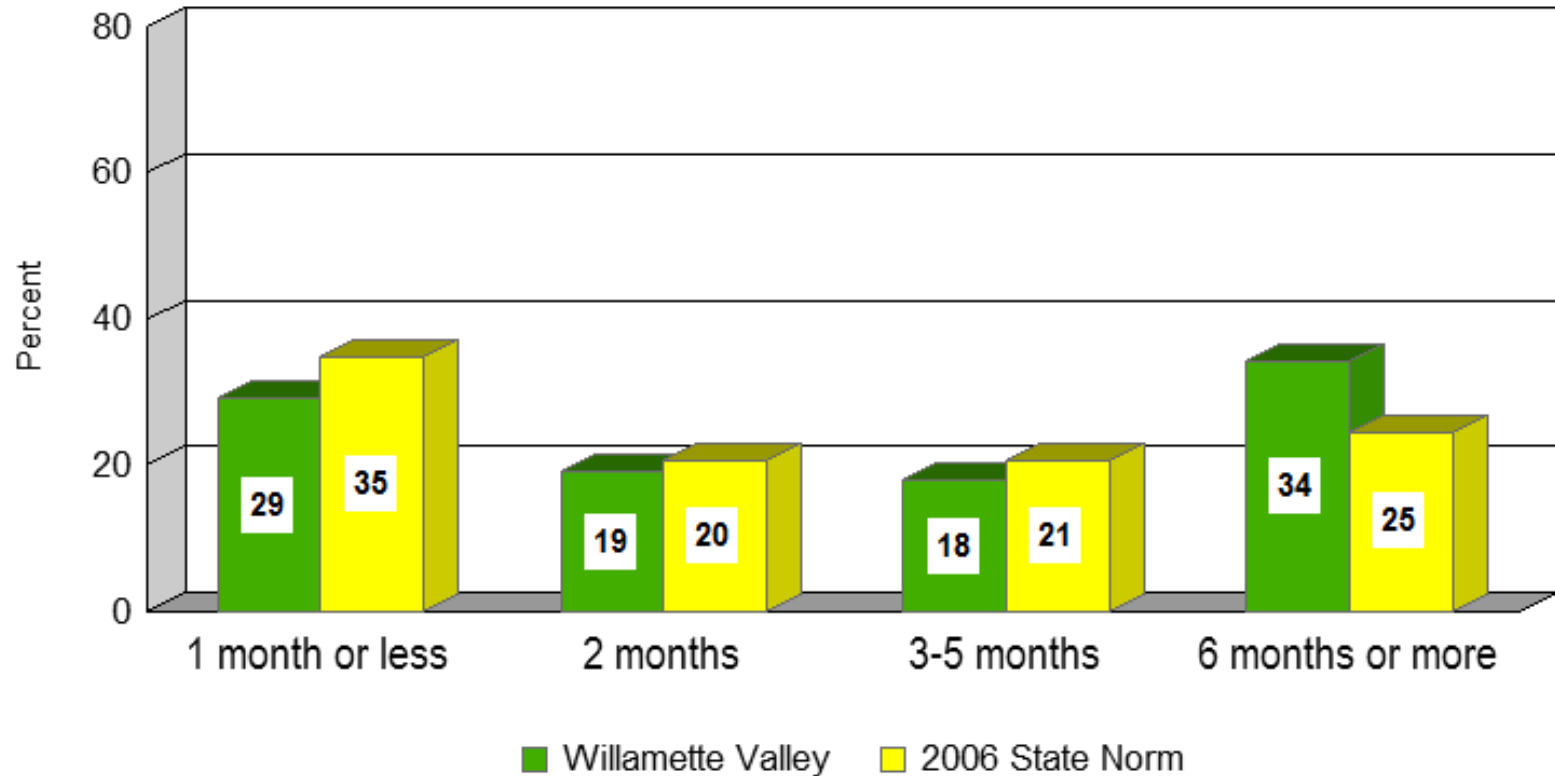
The Willamette Valley Region  
Marketable Trip Characteristics,  
Visitor Profile and Imagery  
— **2004/2006**

# Marketable Trip Characteristics — 2004/2006

# Planning Cycle - 2004/2006



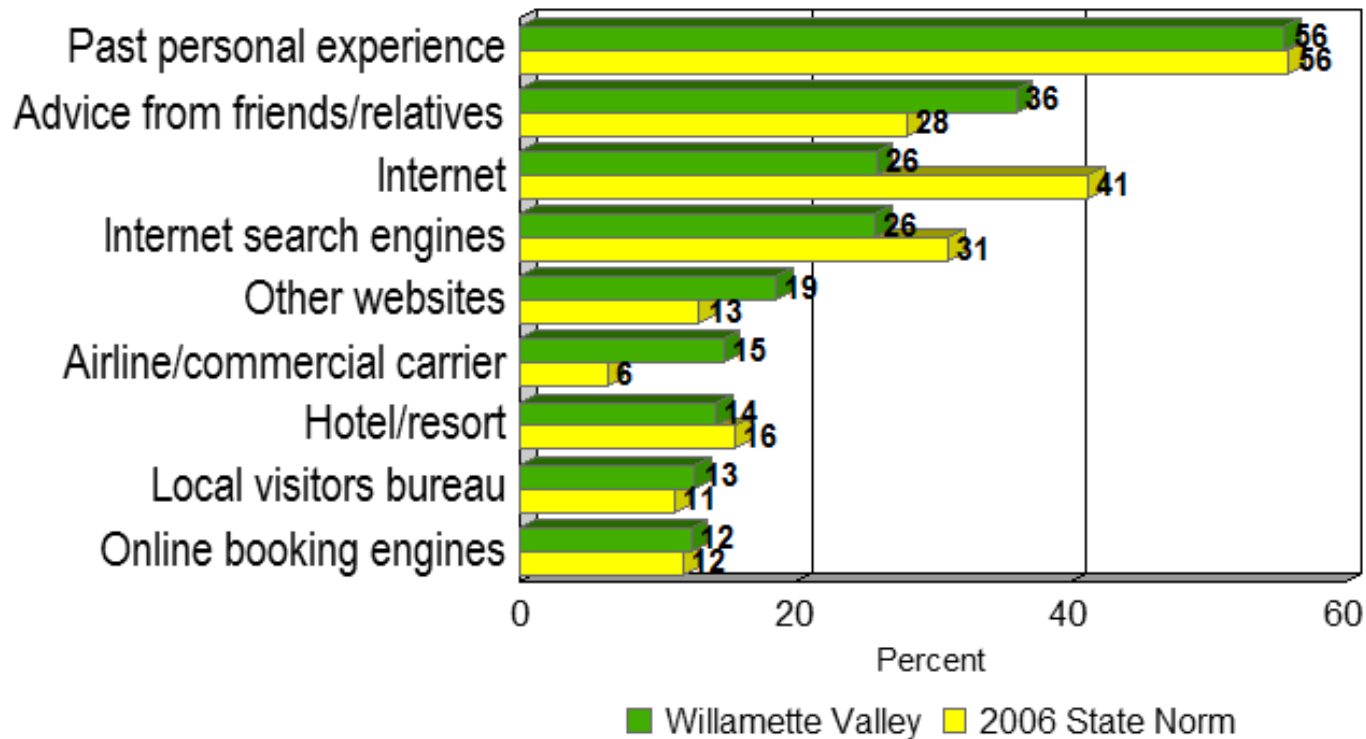
Base: Overnight Marketable Trips Planned in Advance



# Information Sources Used for Planning - 2004/2006



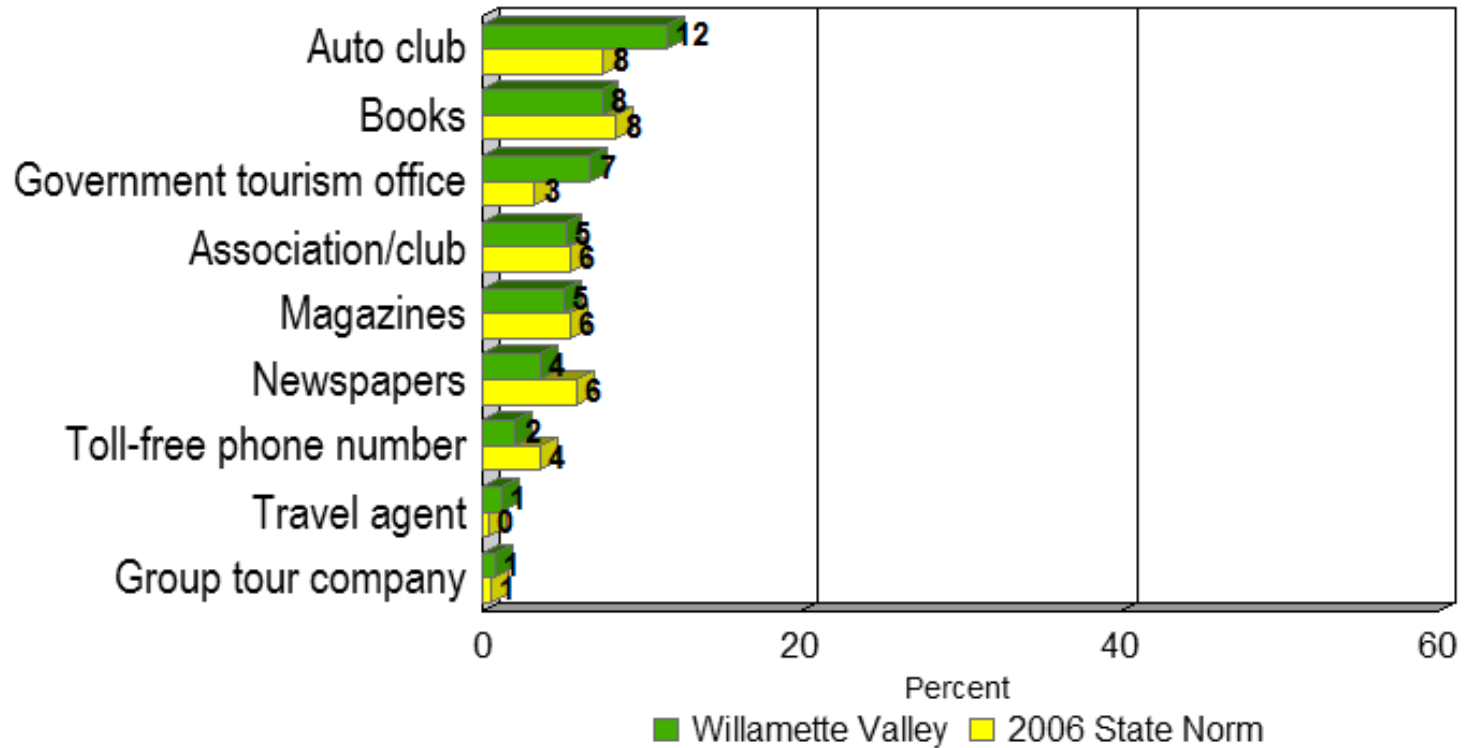
Base: Overnight Marketable Trips



# Information Sources Used for Planning - 2004/2006 (Cont'd)



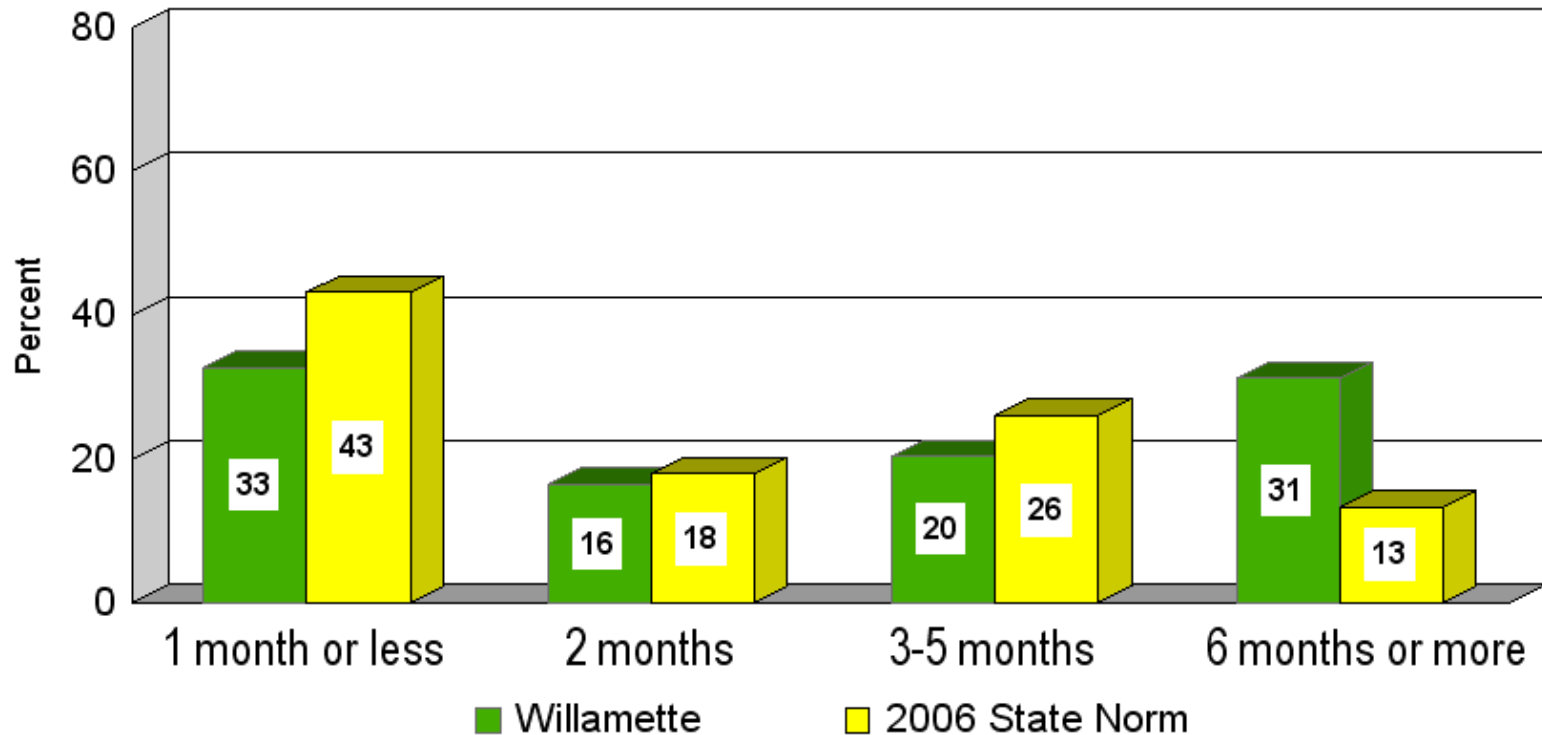
Base: Overnight Marketable Trips



# Booking Cycle - 2004/2006



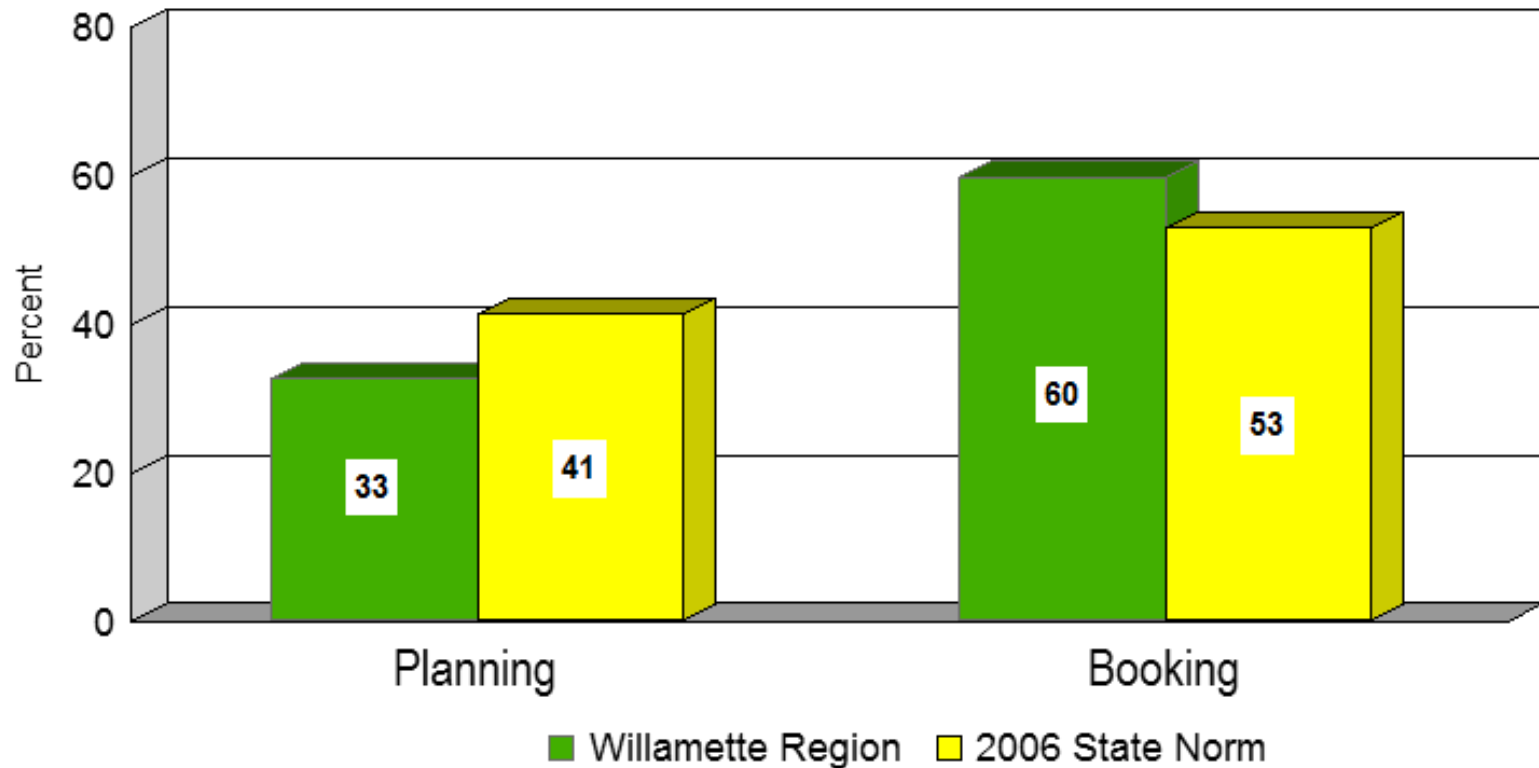
Base: Overnight Marketable Trips Booked in Advance



# Use of Internet for Trip Planning and Booking — 2004/2006



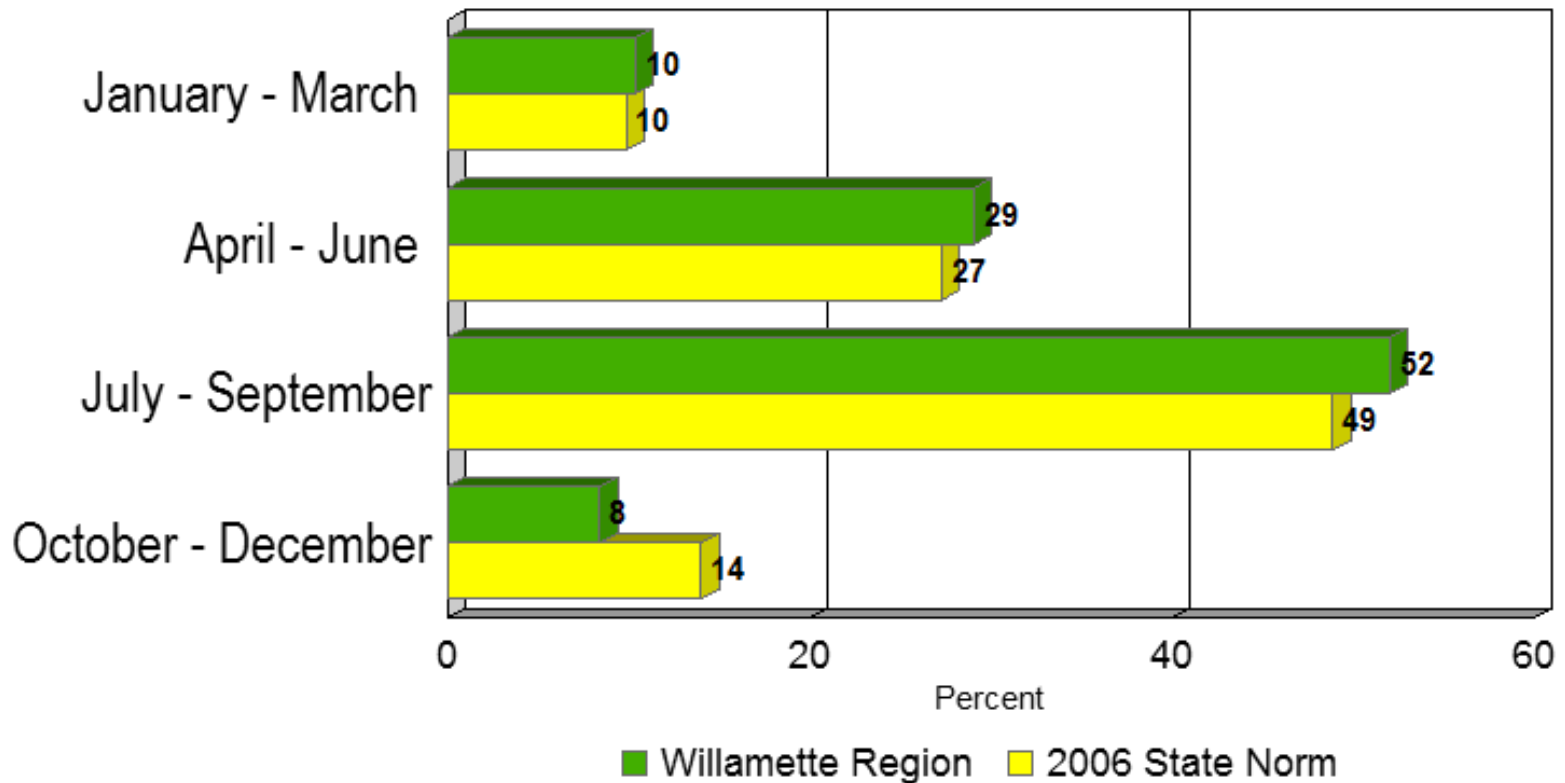
Base: Overnight Marketable Trips



# Trip Seasonality -- 2004/2006



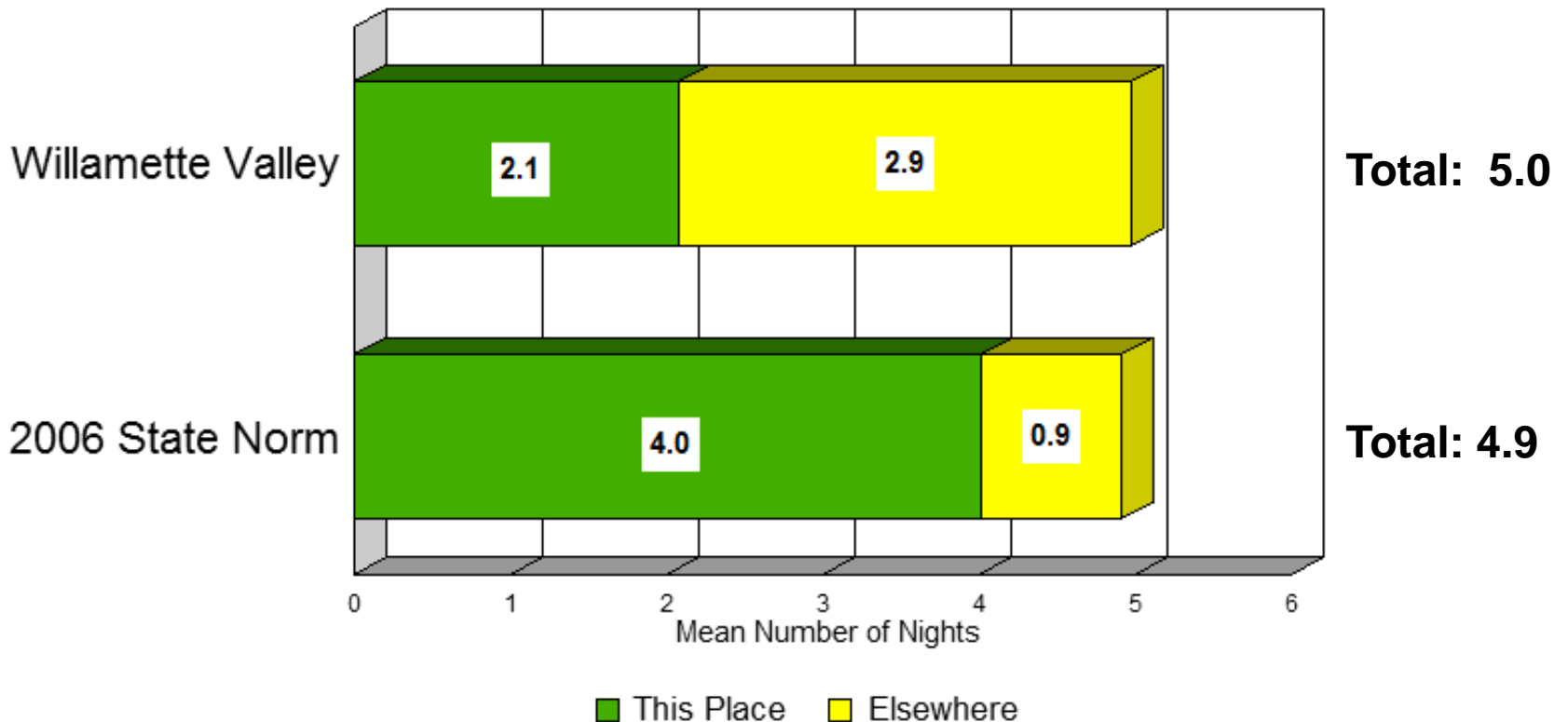
Base: Overnight Marketable Trips



# Length of Stay - 2004/2006



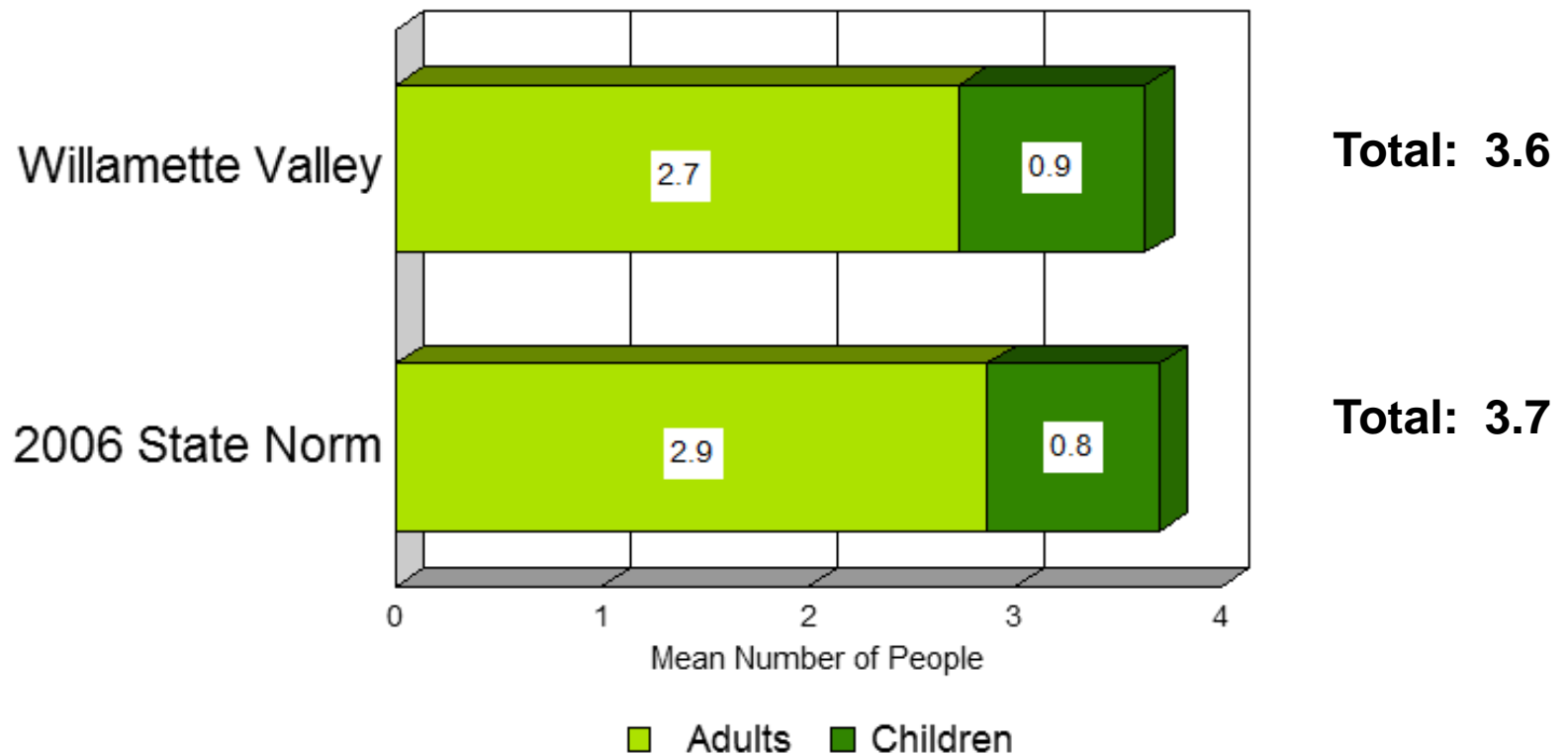
Base: Overnight Marketable Trips



# Size of Travel Party - 2004/2006



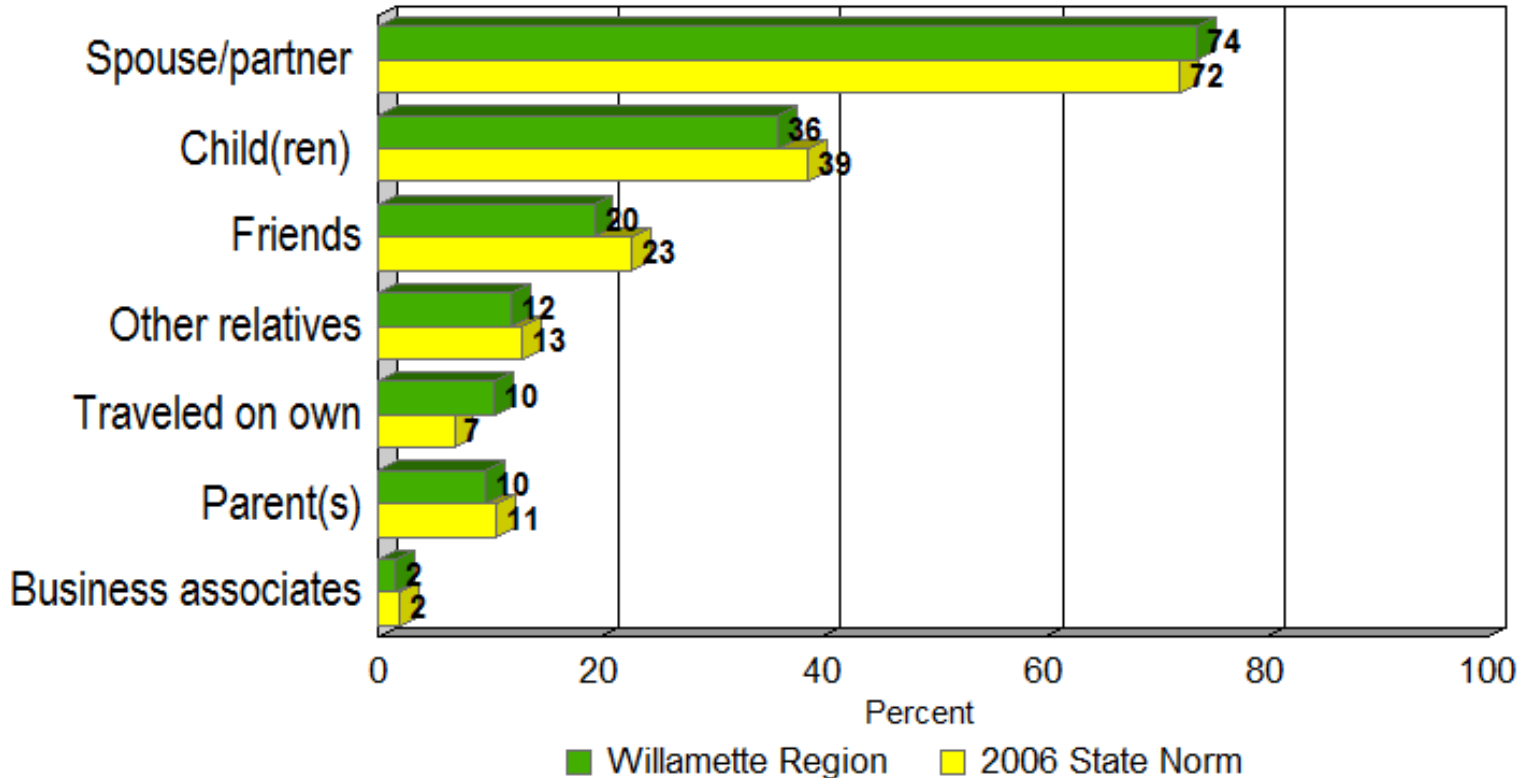
Base: Overnight Marketable Trips



# Travel Party Composition - 2004/2006



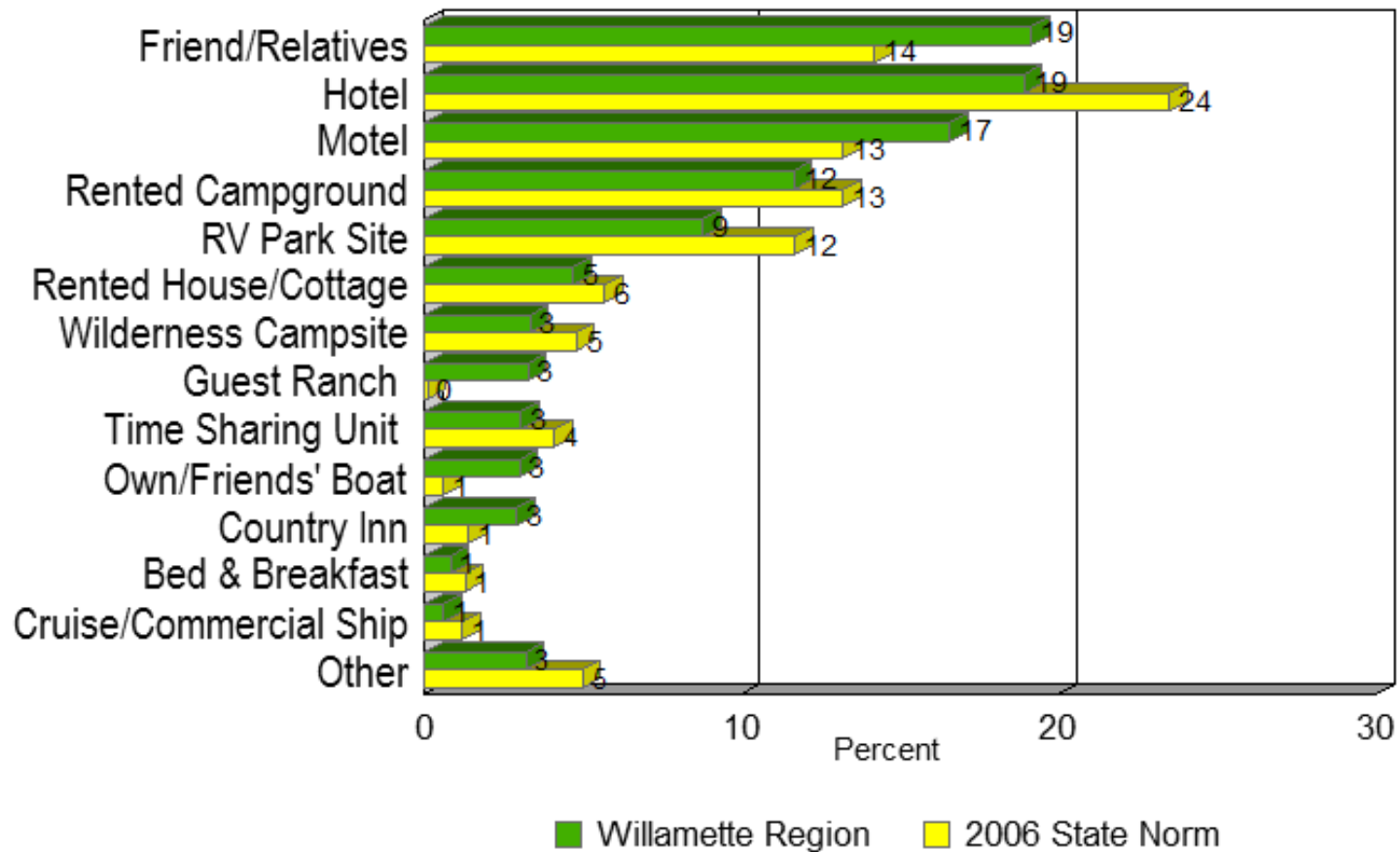
Base: Overnight Marketable Trips



# Accommodation Used\* - 2004/2006



Base: Overnight Marketable Trips



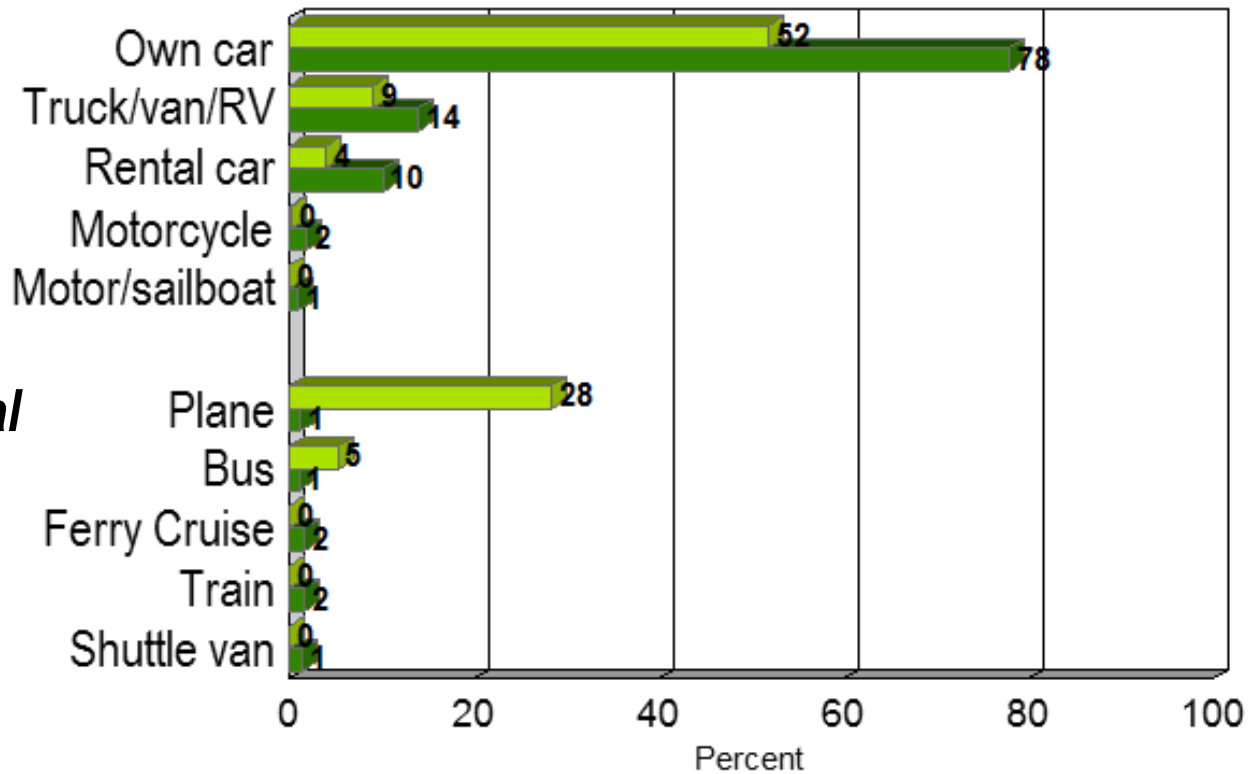
\* Percent of trip nights spent in each type of accommodation

# Transportation Used — 2004/2006



Base: Overnight Marketable Trips

## *Personal*

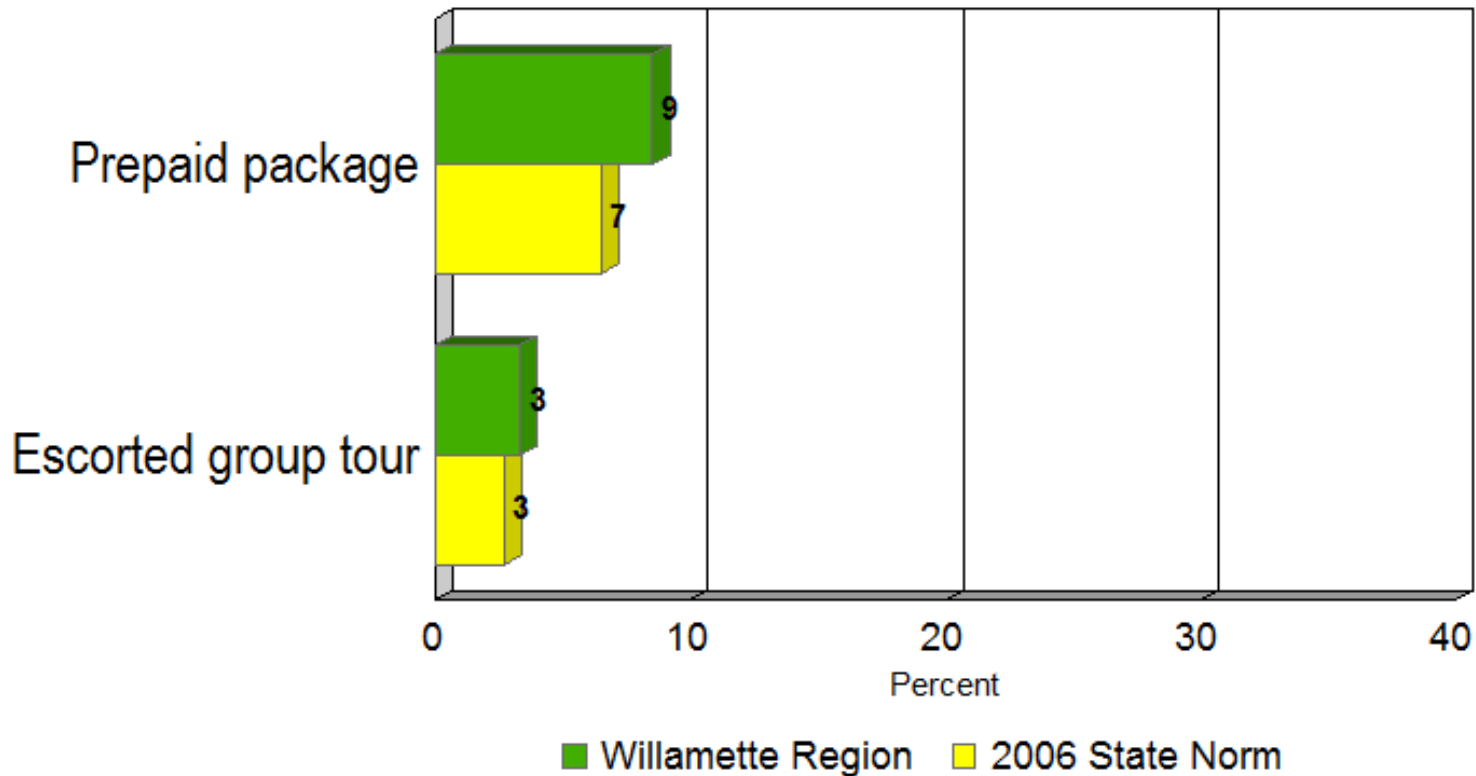


■ To Enter Region ■ Inside Region

# Use of Vacation Packages and Group Travel - 2004/2006



Base: Overnight Marketable Trips

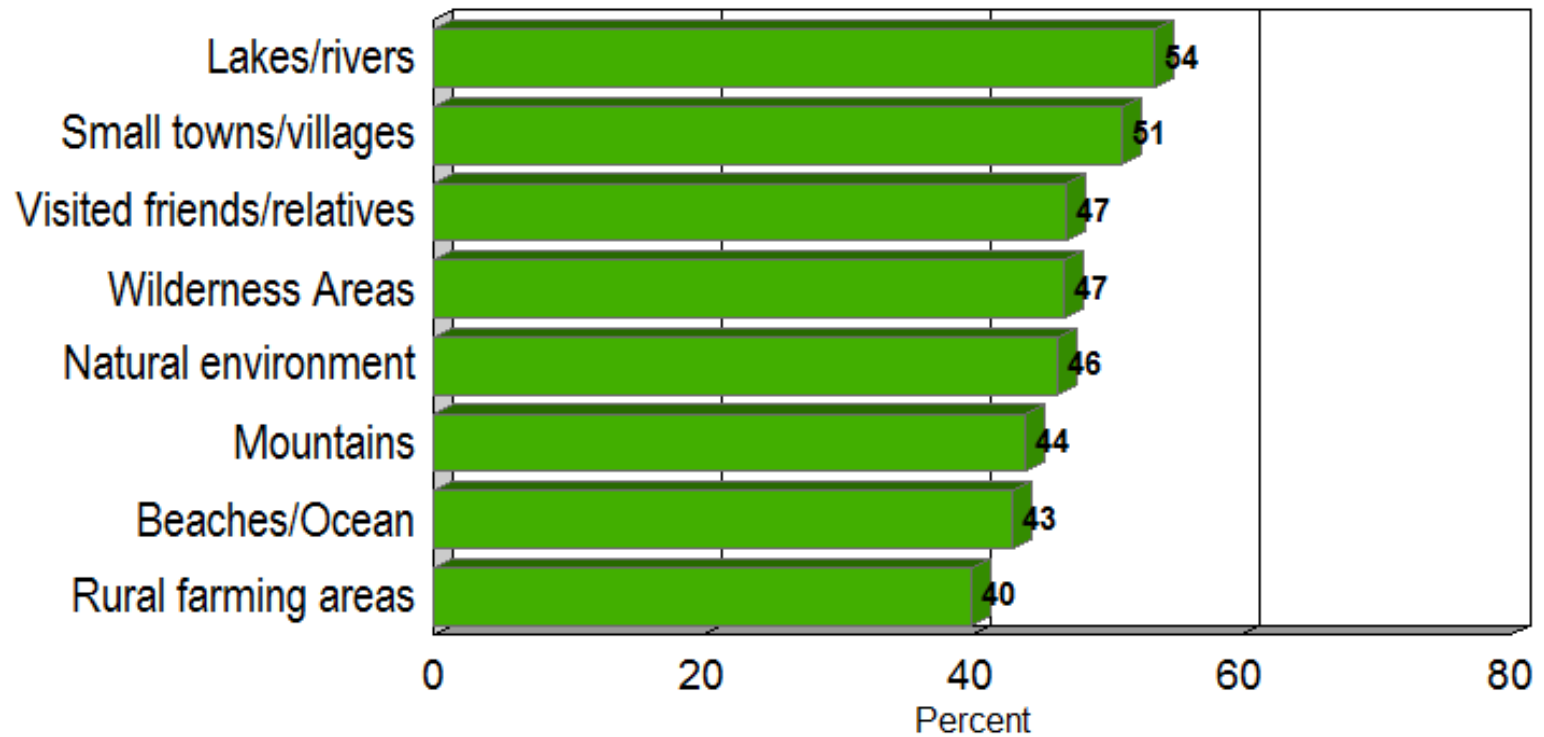


# Marketable Trip Experiences — 2004/2006

# Experiences and Sightseeing - 2004/2006



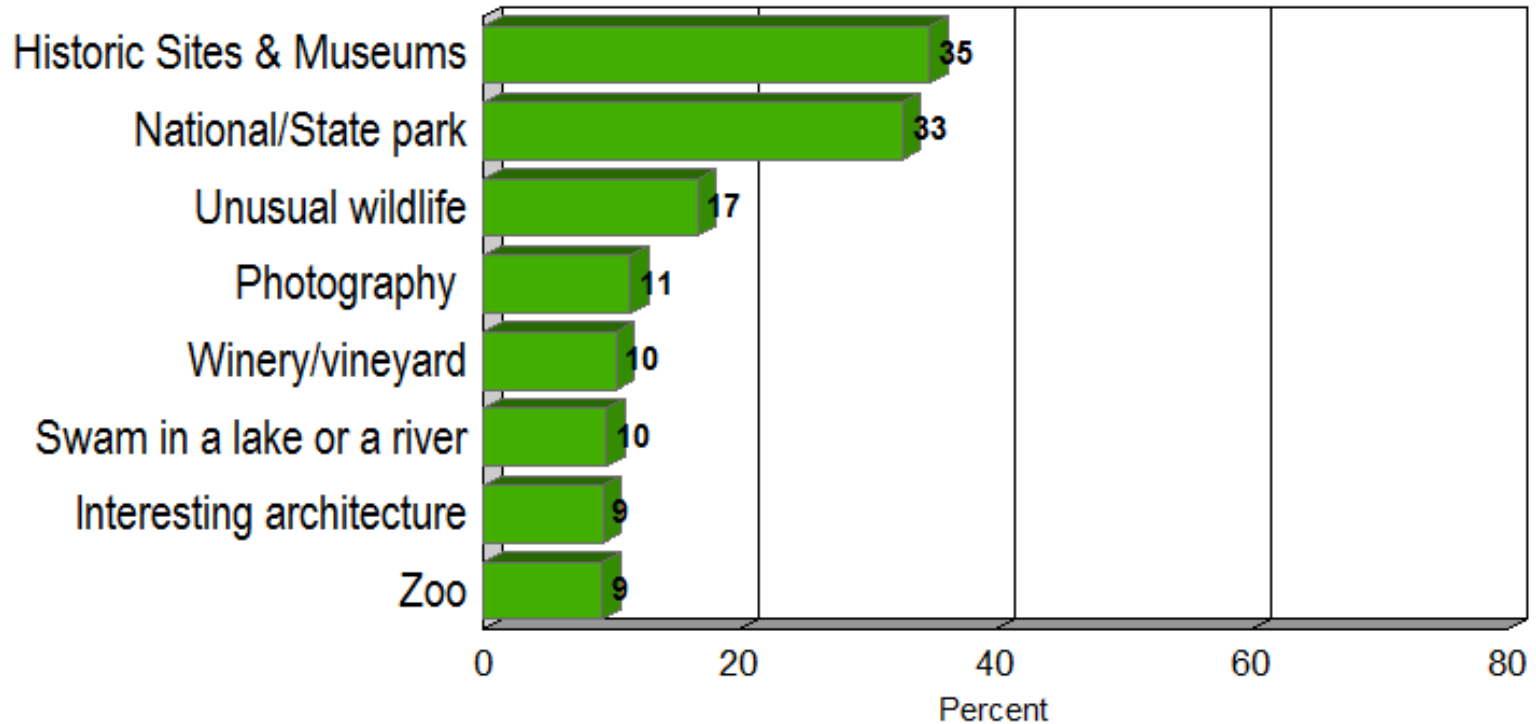
Base: Overnight Marketable Trips



# Experiences and Sightseeing - 2004/2006 (Cont'd)



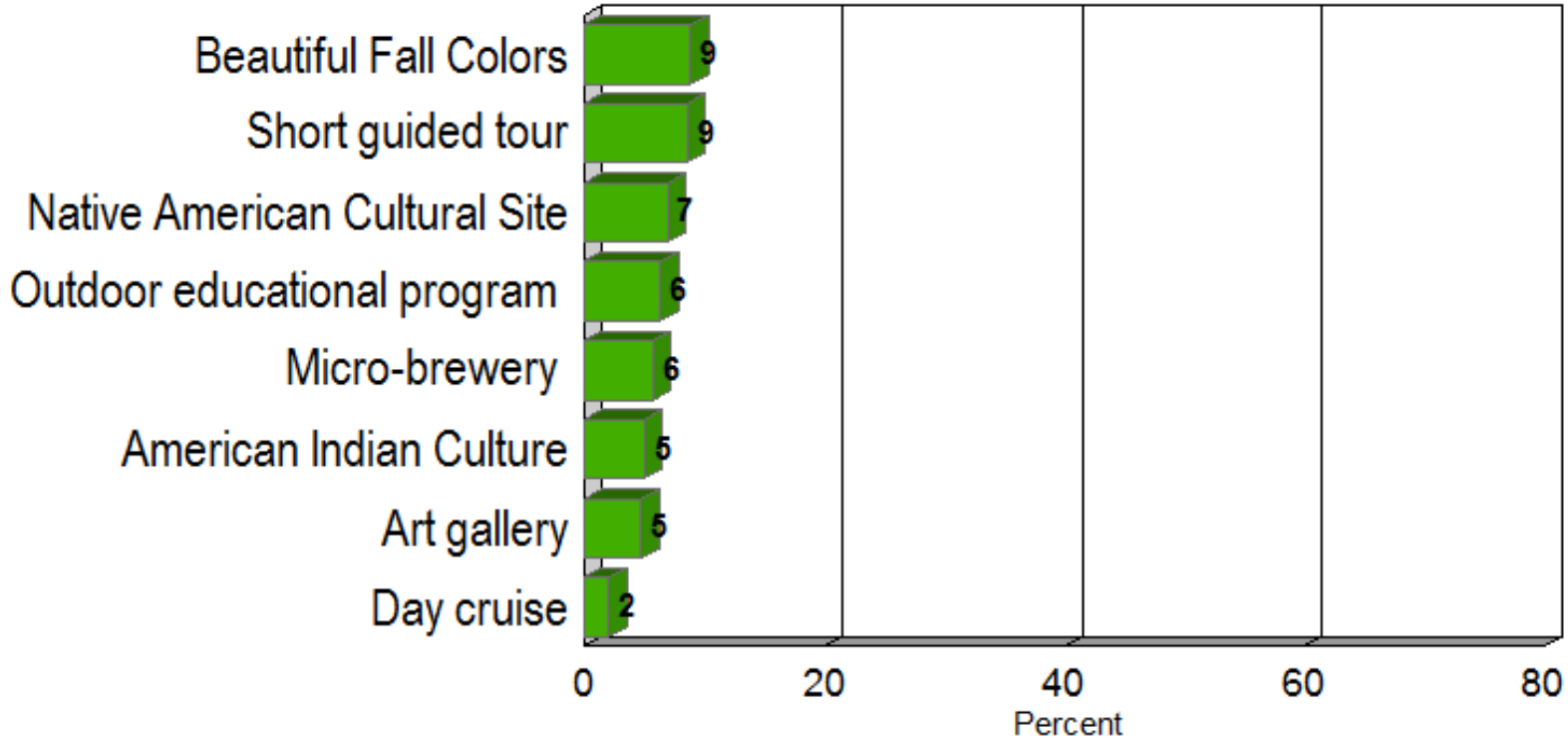
Base: Overnight Marketable Trips



# Experiences and Sightseeing - 2004/2006 (Cont'd)



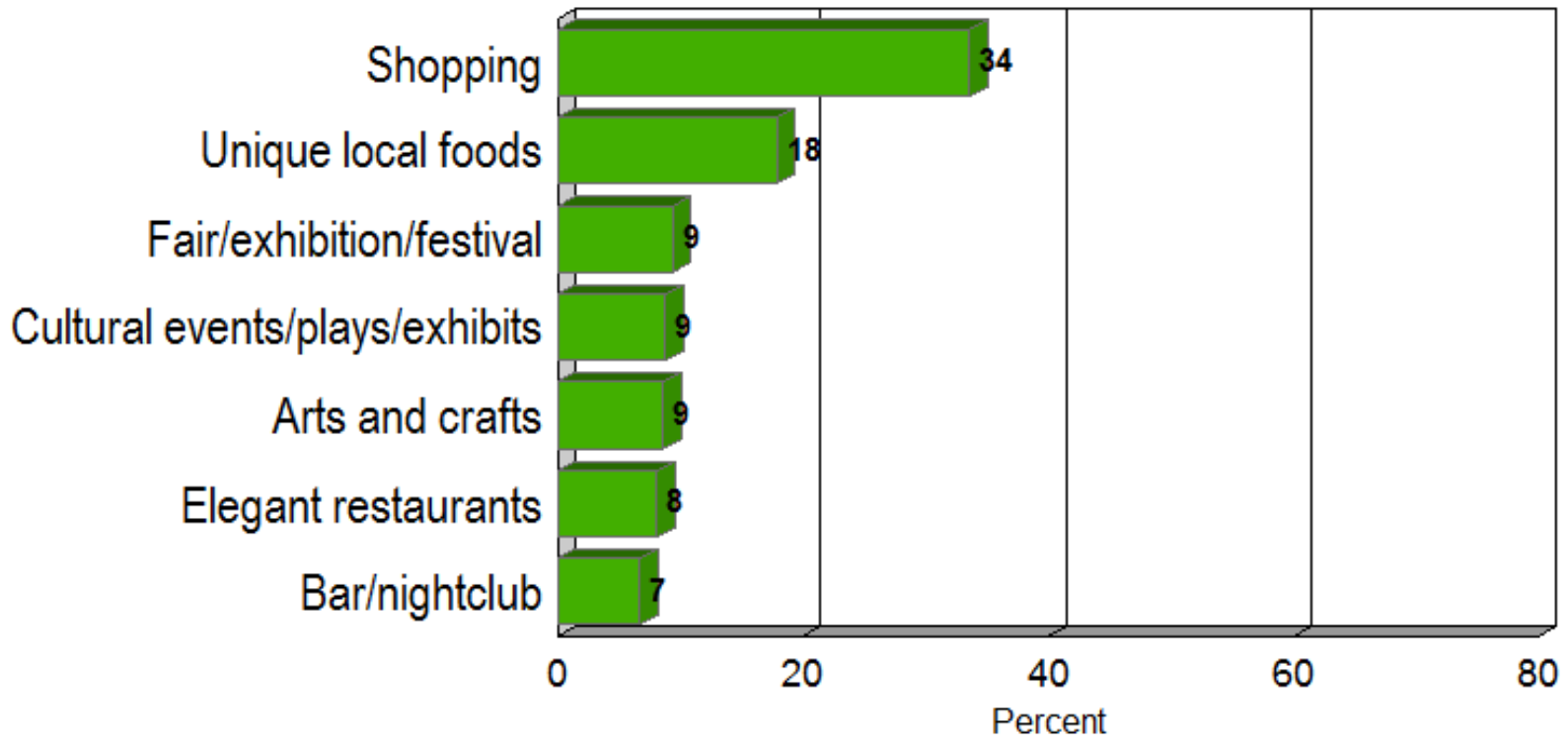
Base: Overnight Marketable Trips



# Entertainment - 2004/2006



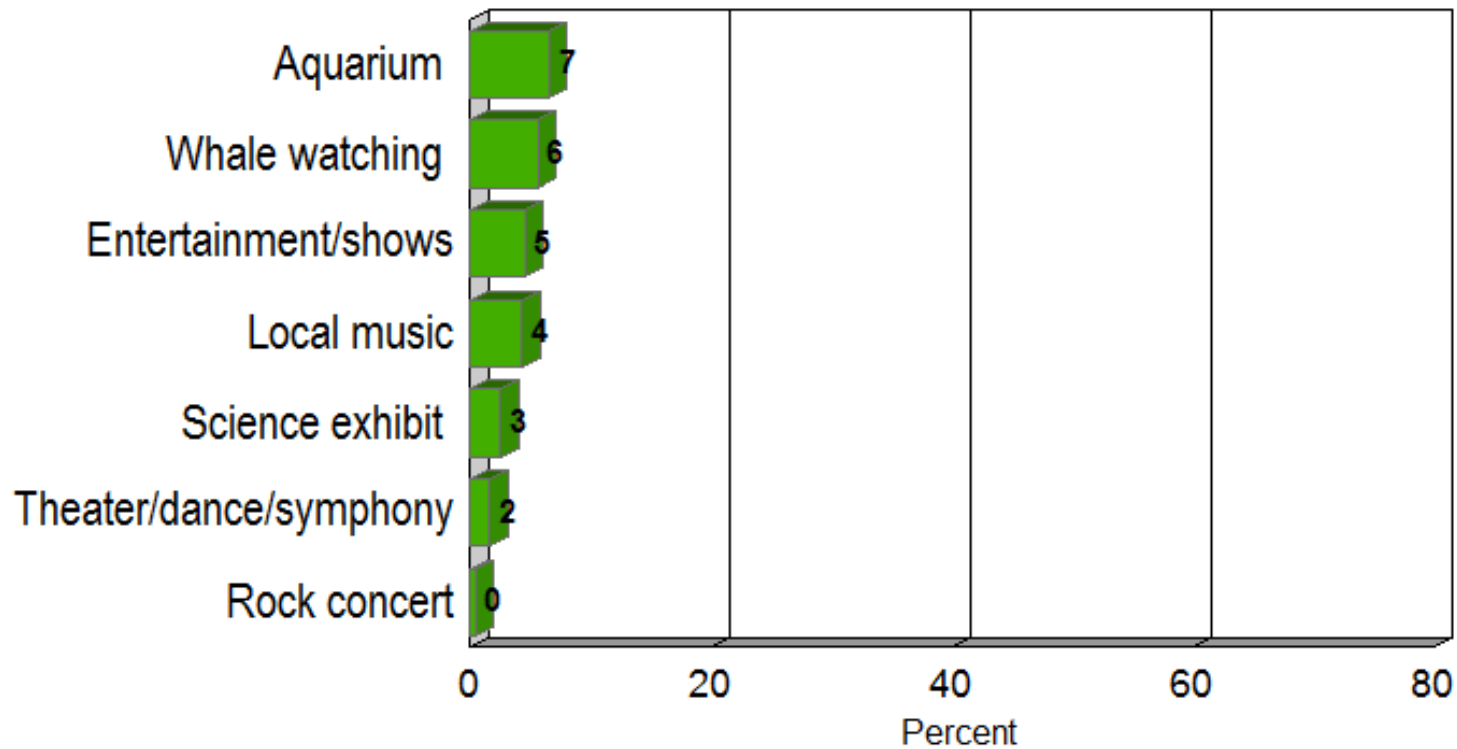
Base: Overnight Marketable Trips



# Entertainment - 2004/2006 Cont'd



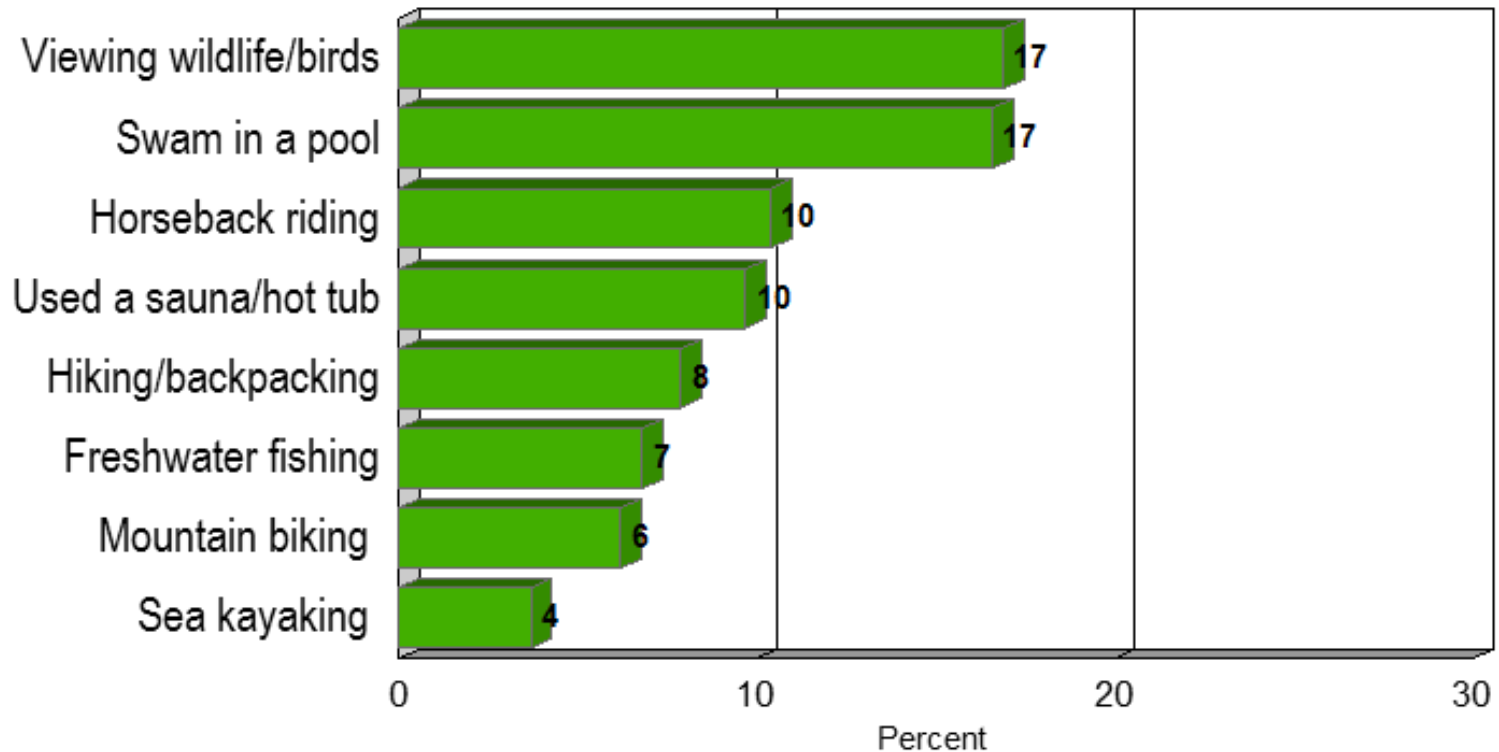
Base: Overnight Marketable Trips



# Sports & Recreation - 2004/2006



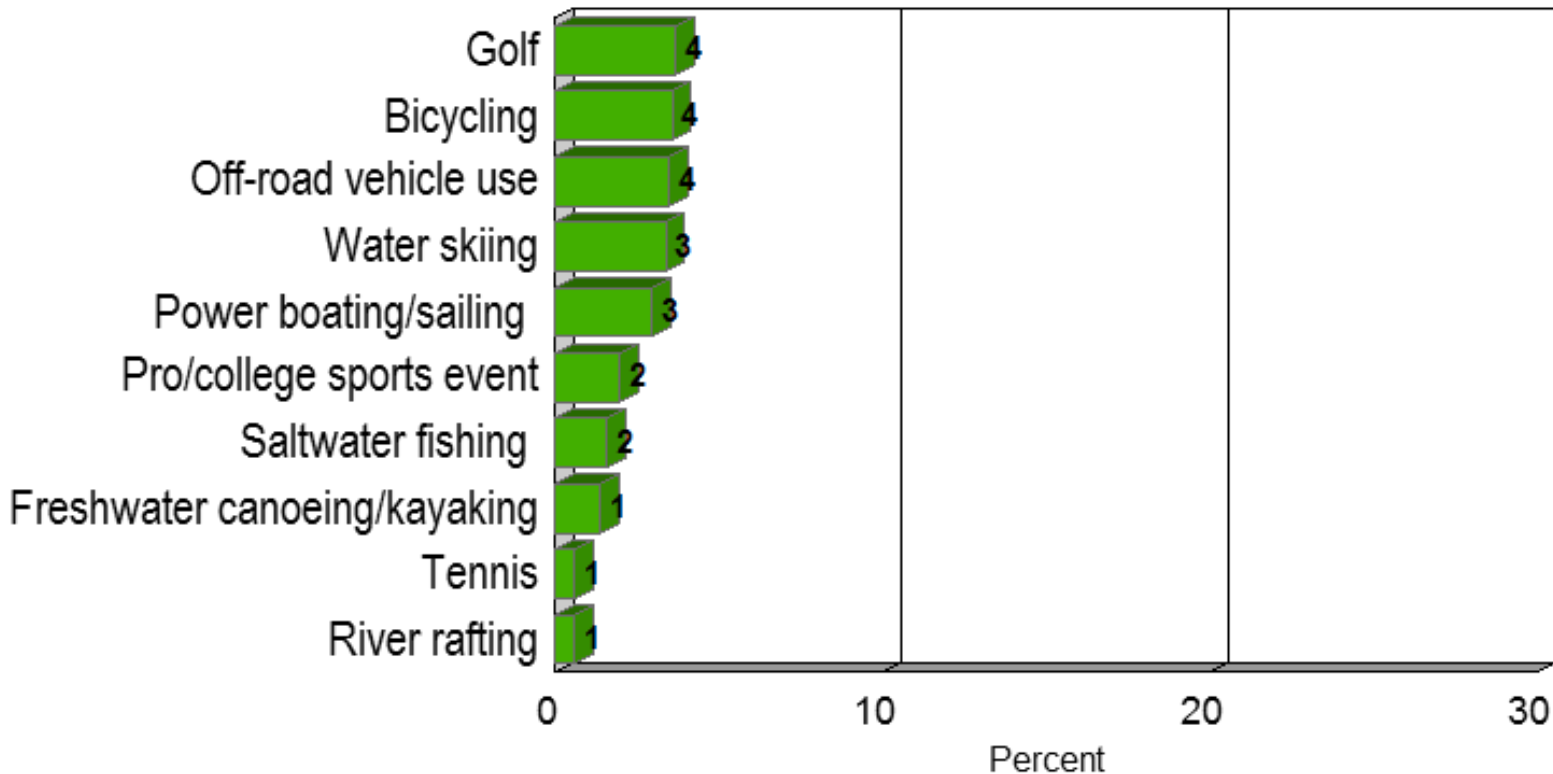
Base: Overnight Marketable Trips



# Sports & Recreation - 2004/2006 (Cont'd)



Base: Overnight Marketable Trips

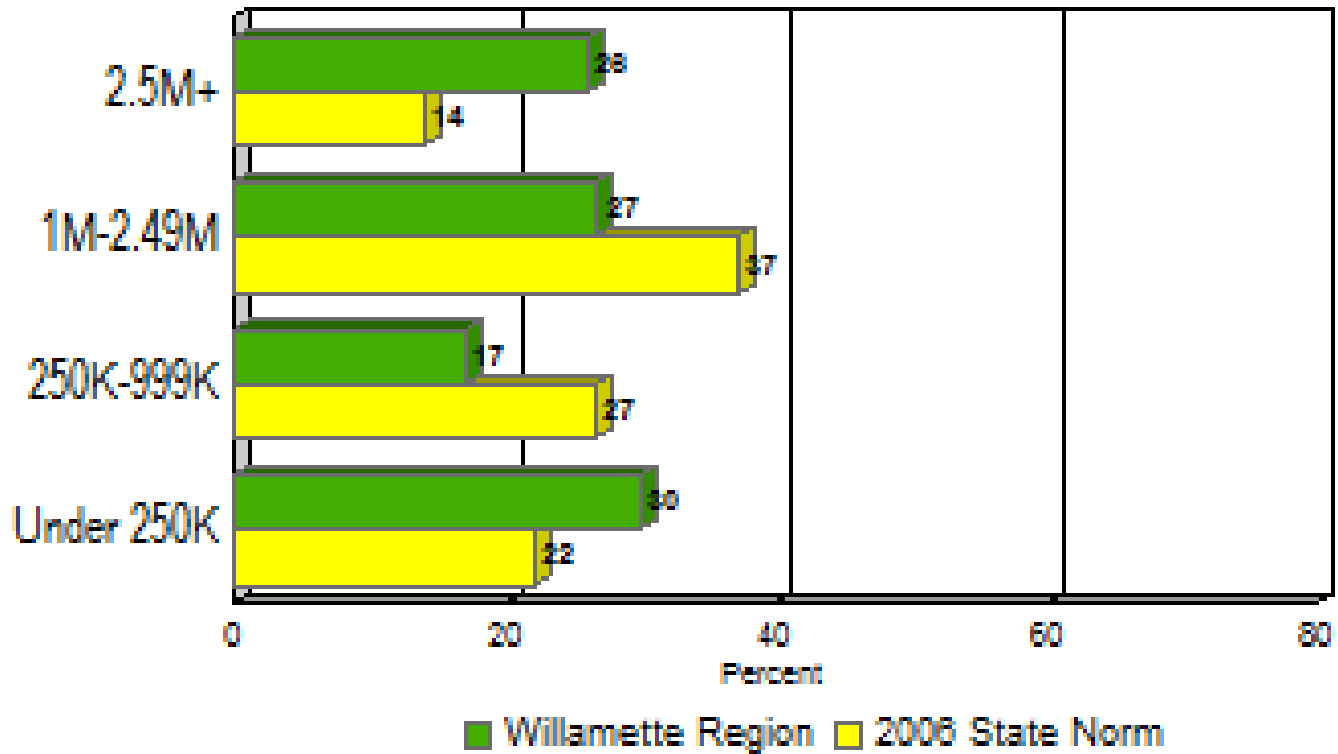


Profile of Overnight Visitors To  
The Willamette Valley Region  
— 2004/2006

# Community Size - 2004/2006



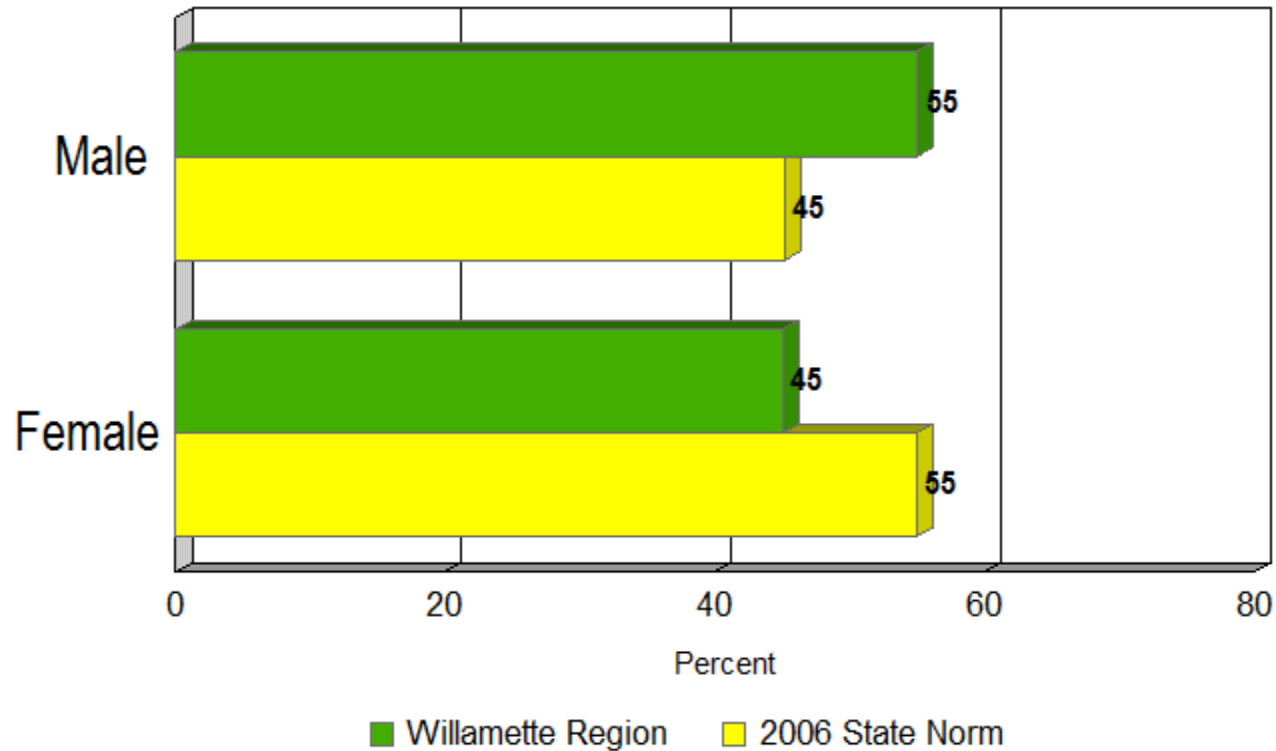
Base: Overnight Marketable Trips



# Gender - 2004/2006



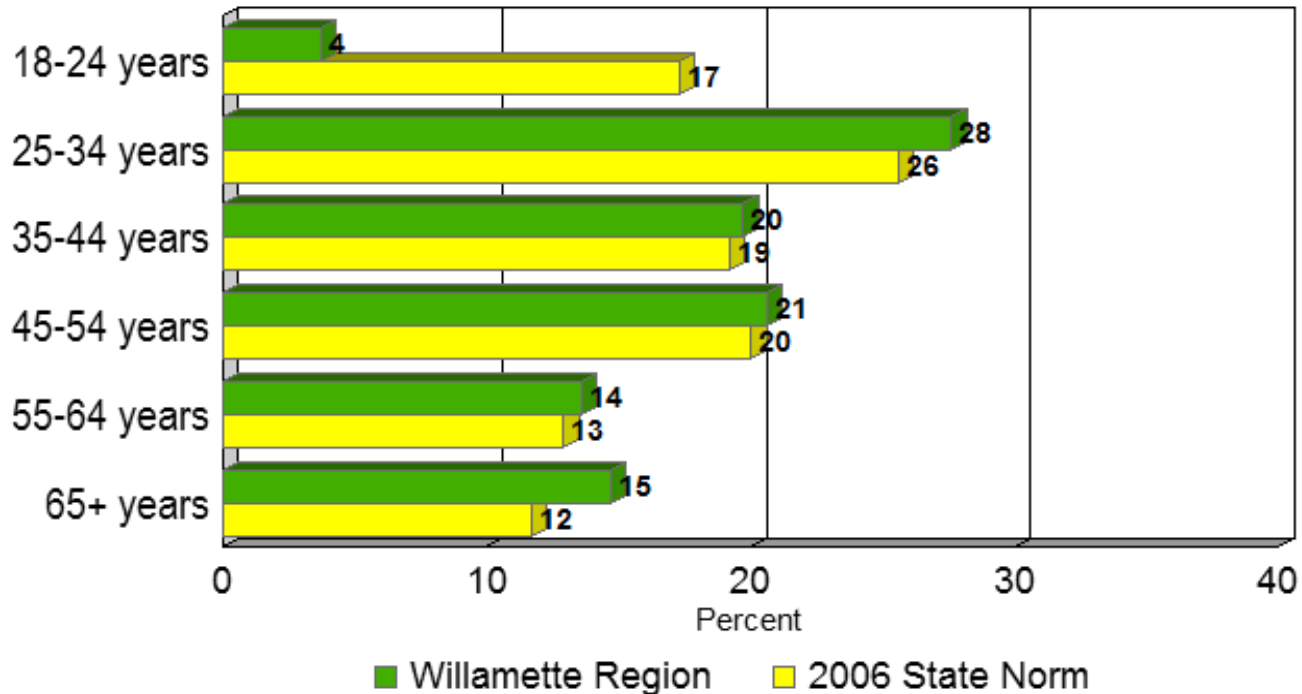
Base: Overnight Marketable Trips



# Age - 2004/2006



Base: Overnight Marketable Trips

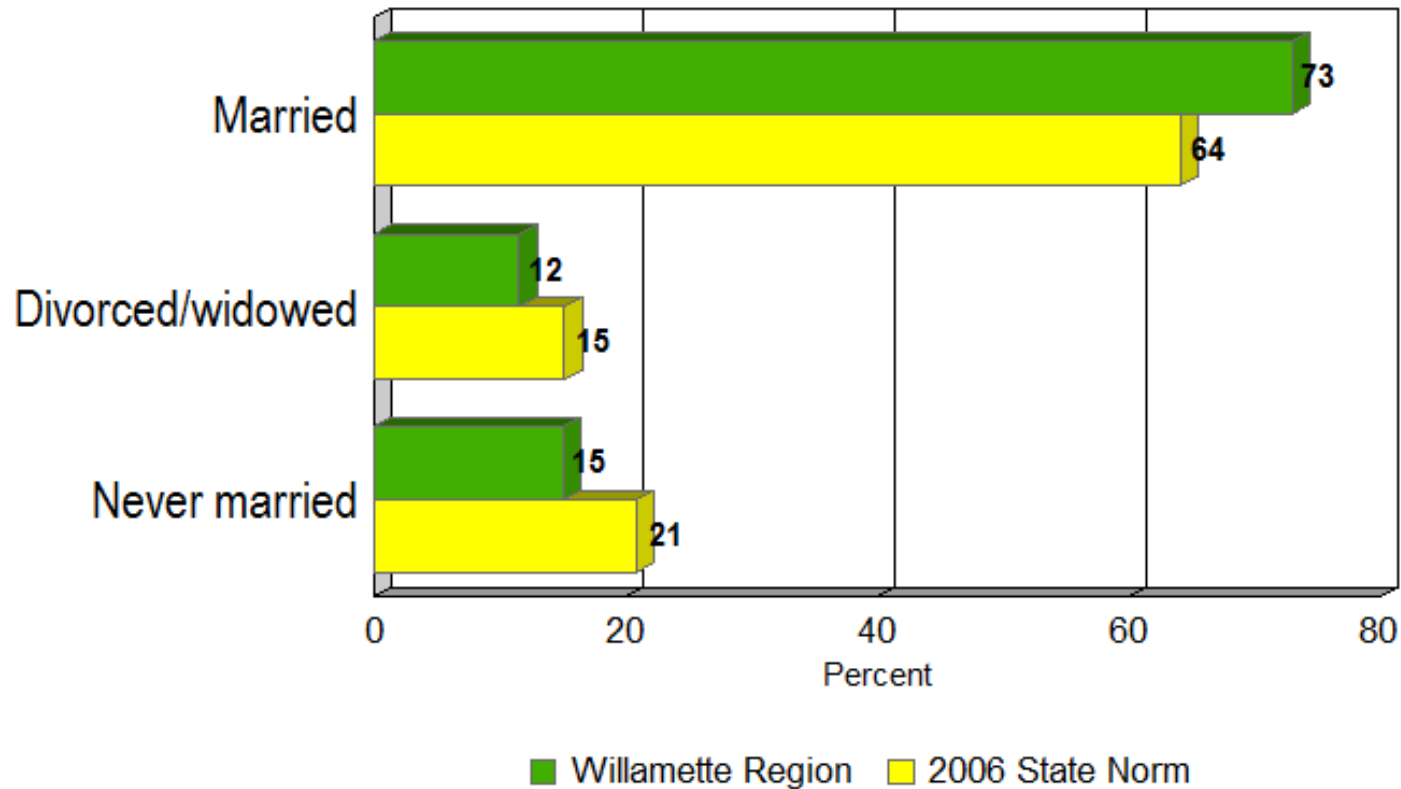


	<u>Willamette Valley Region</u>	<u>Oregon Norm</u>
Average Age	45.2	43.3

# Marital Status - 2004/2006



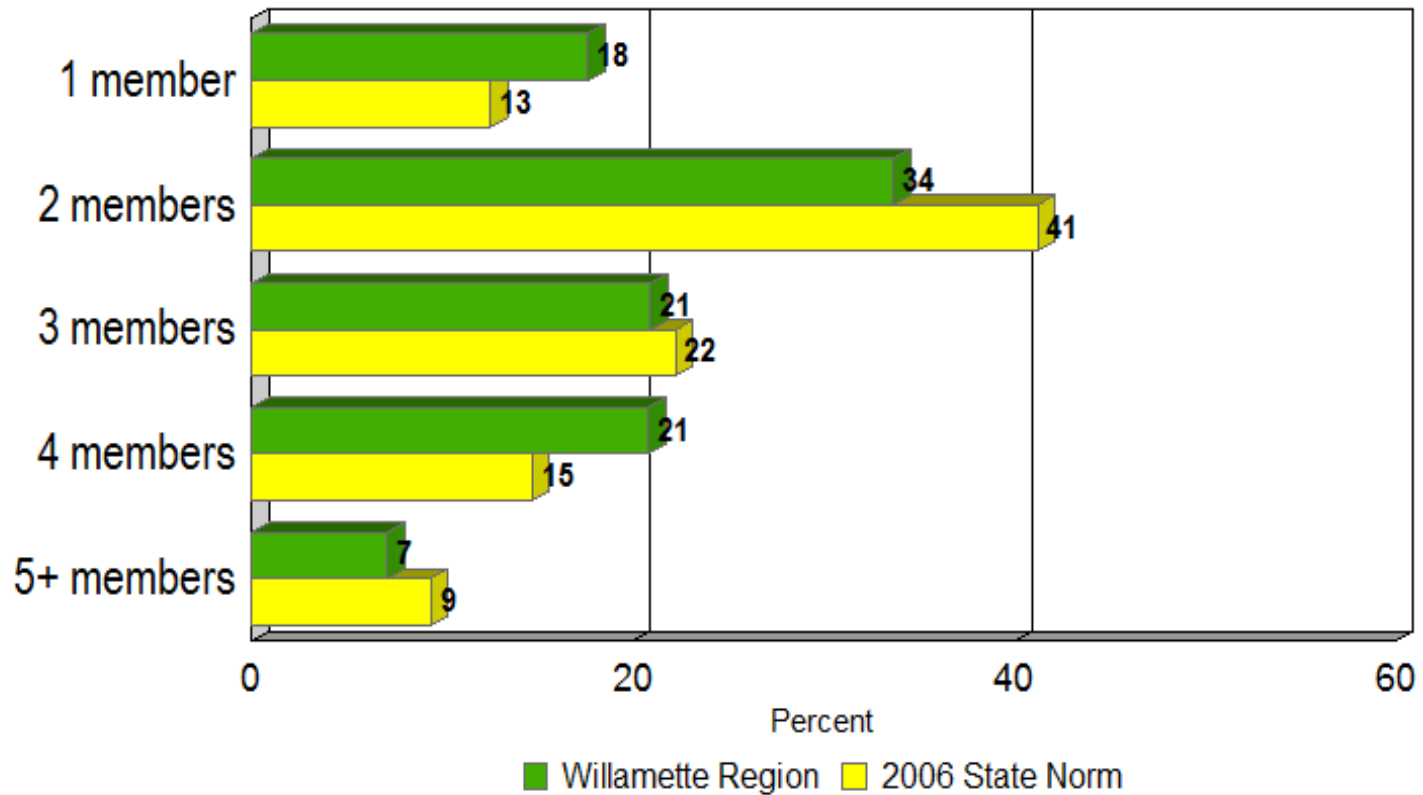
Base: Overnight Marketable Trips



# Household Size - 2004/2006



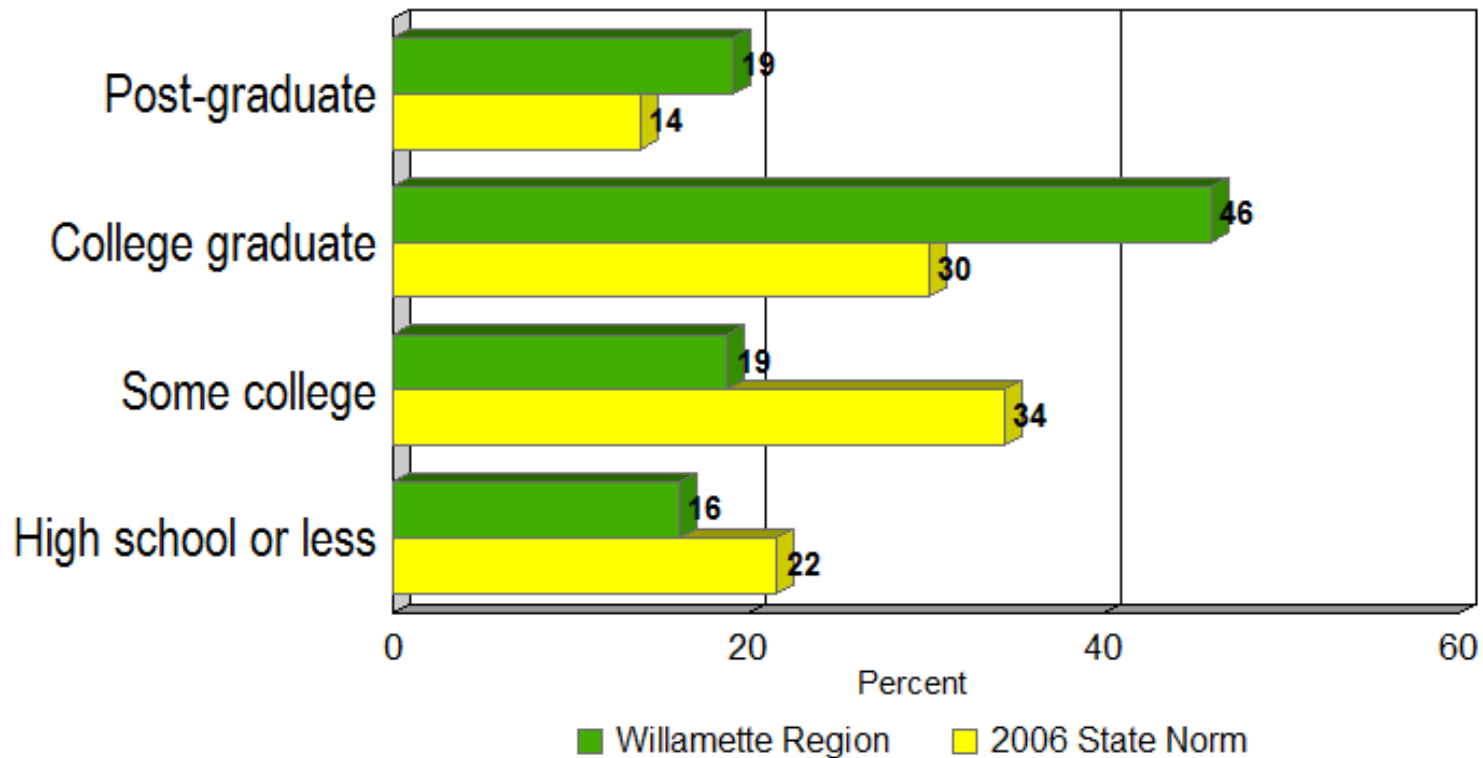
Base: Overnight Marketable Trips



# Education - 2004/2006



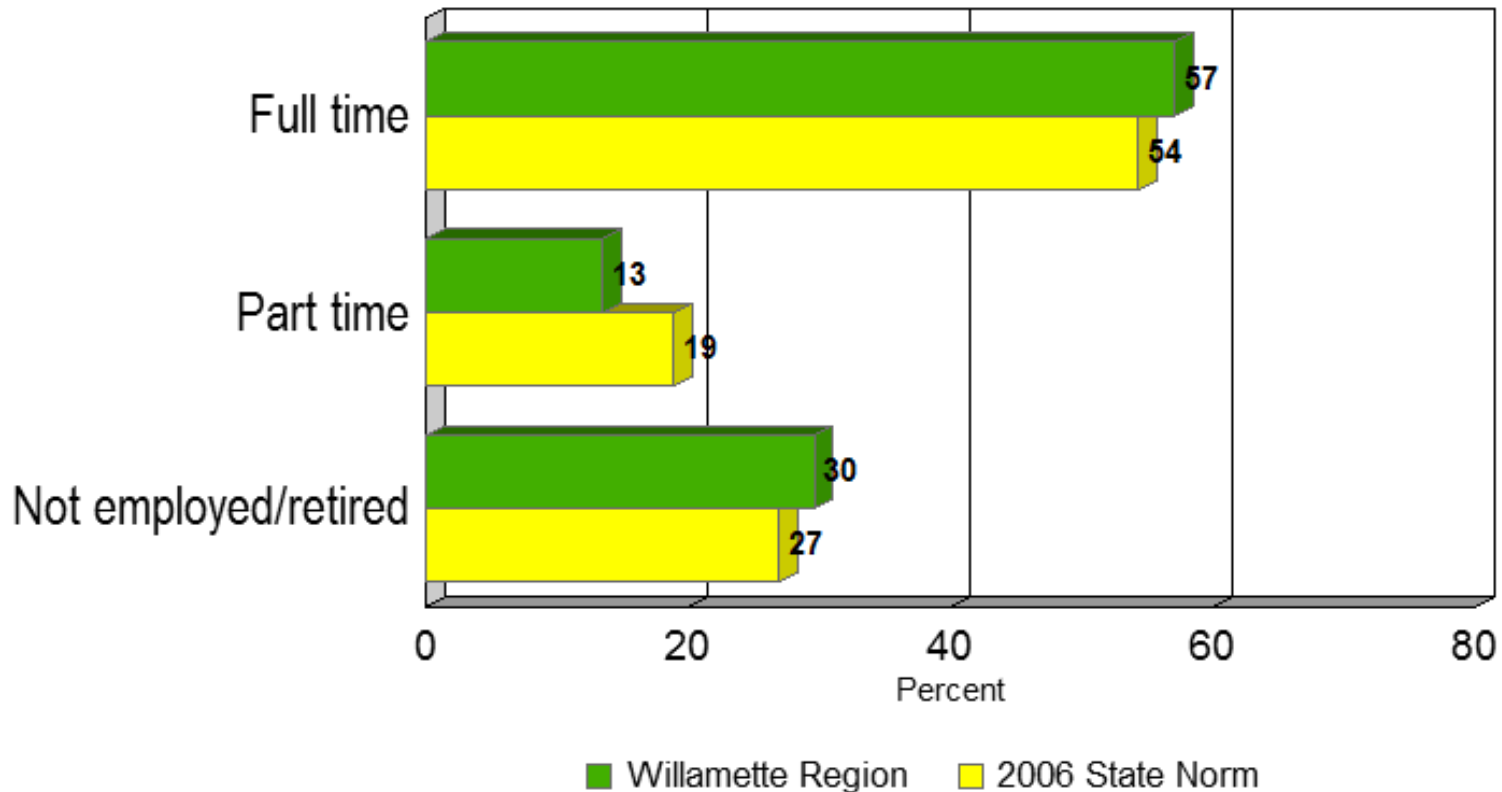
Base: Overnight Marketable Trips



# Employment - 2004/2006



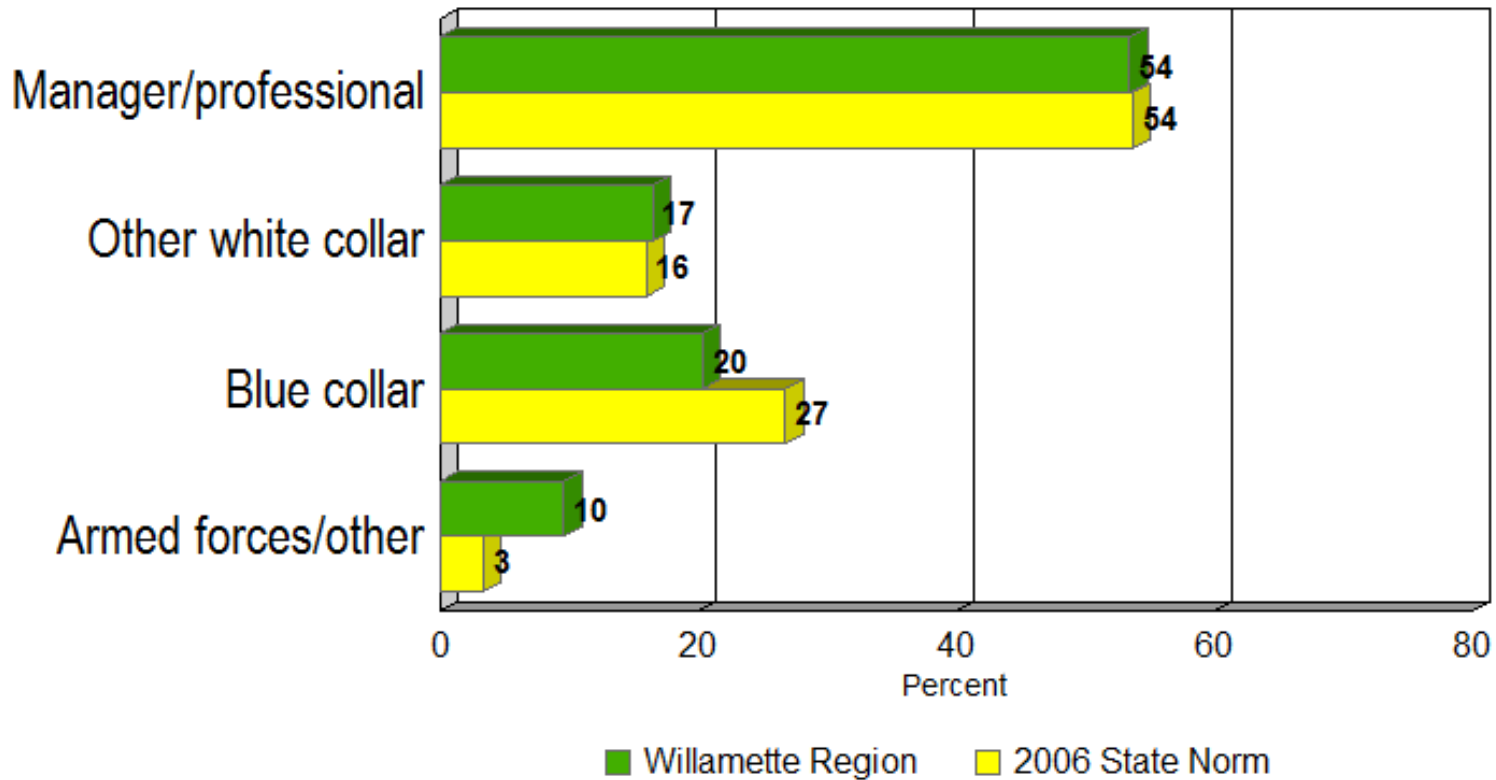
Base: Overnight Marketable Trips



# Occupation - 2004/2006



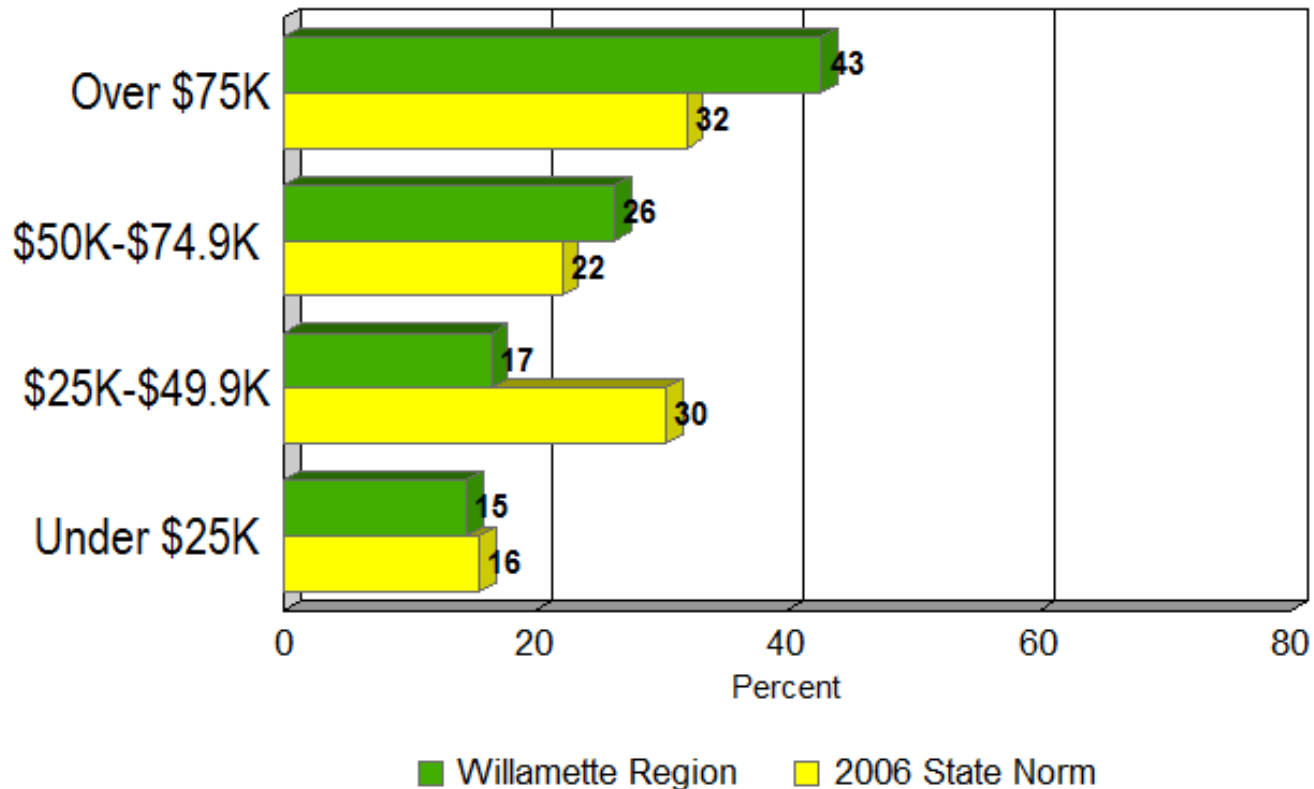
Base: Overnight Marketable Trips



# Income - 2004/2006



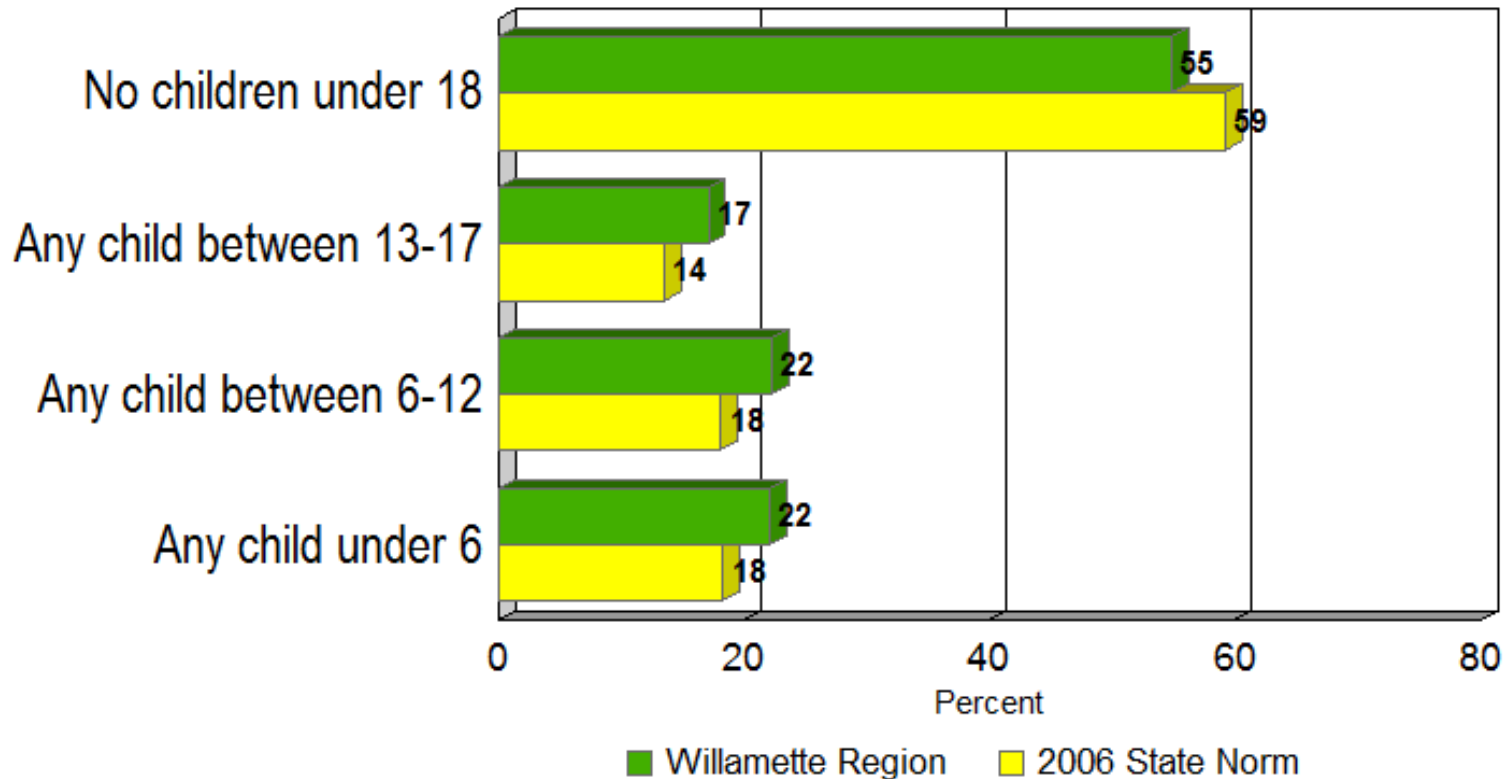
Base: Overnight Marketable Trips



# Children in Household - 2004/2006



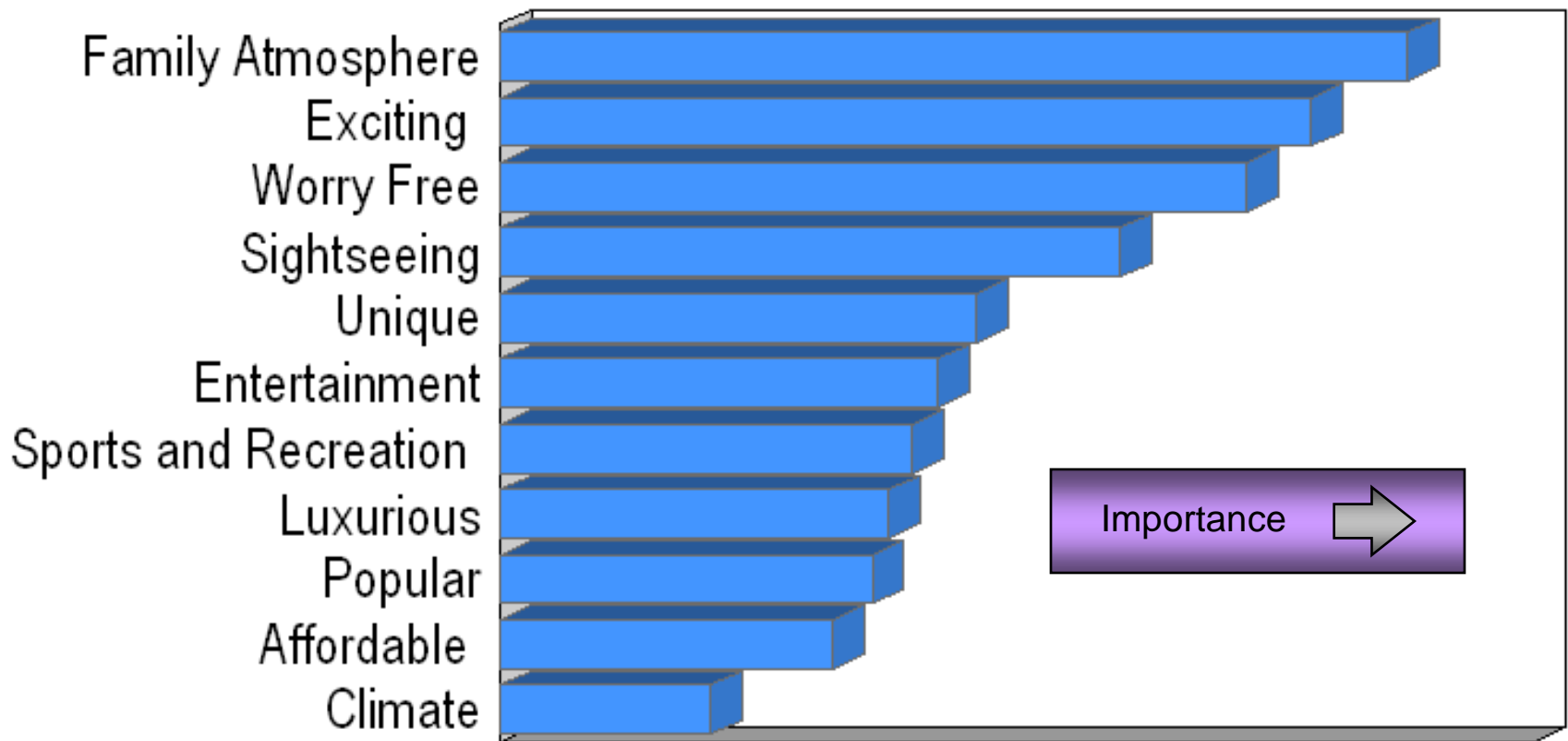
Base: Overnight Marketable Trips



# **(Oregon) Visitor Priorities and Product Delivery**

Among Travelers to the Willamette  
Valley Region  
— 2004/2006

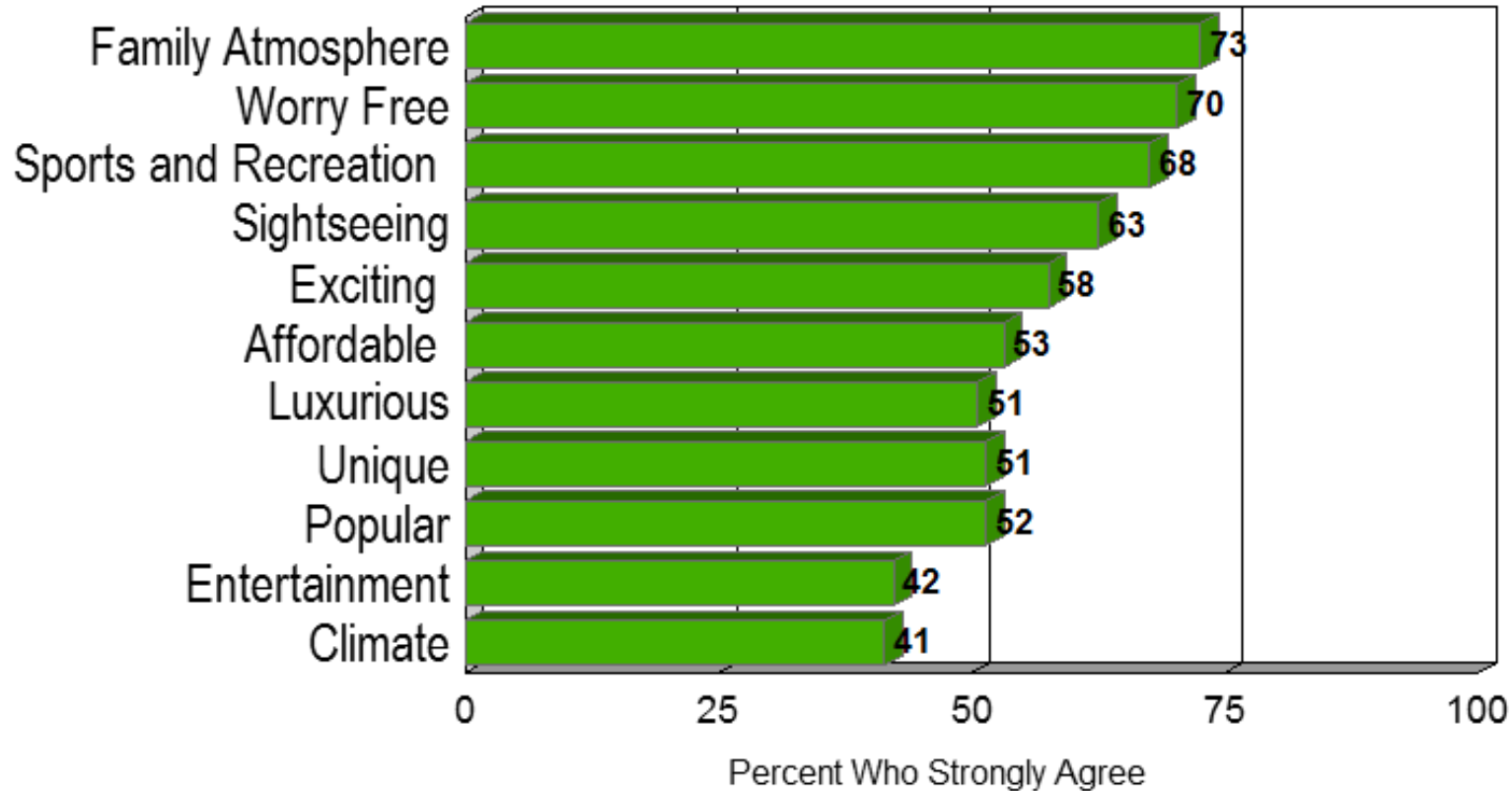
# Visitor Priorities



# Product Delivery on Visitor Priorities — 2004/2006



Base: Overnight Marketable Trips

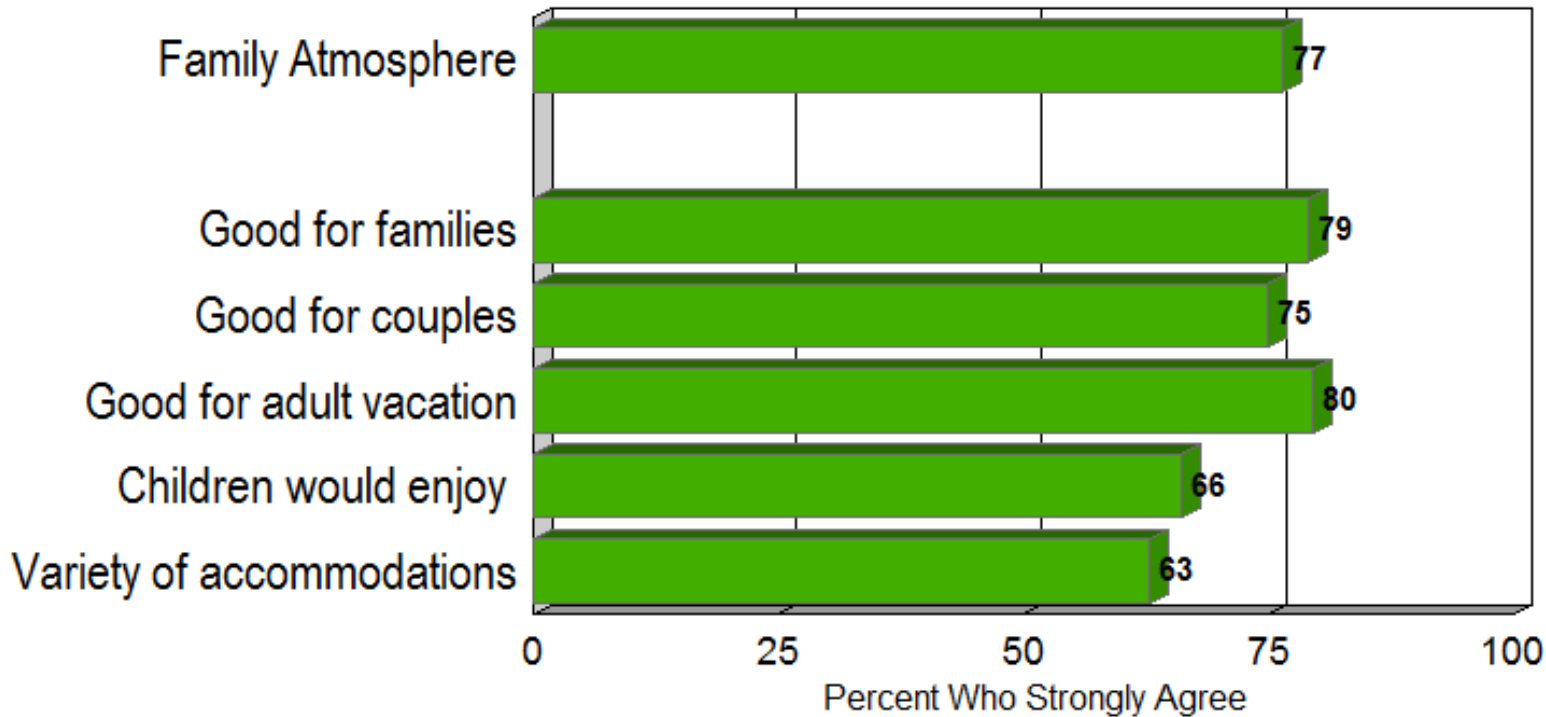


# Product Delivery

## — Family Atmosphere - 2004/2006



Base: Overnight Marketable Trips

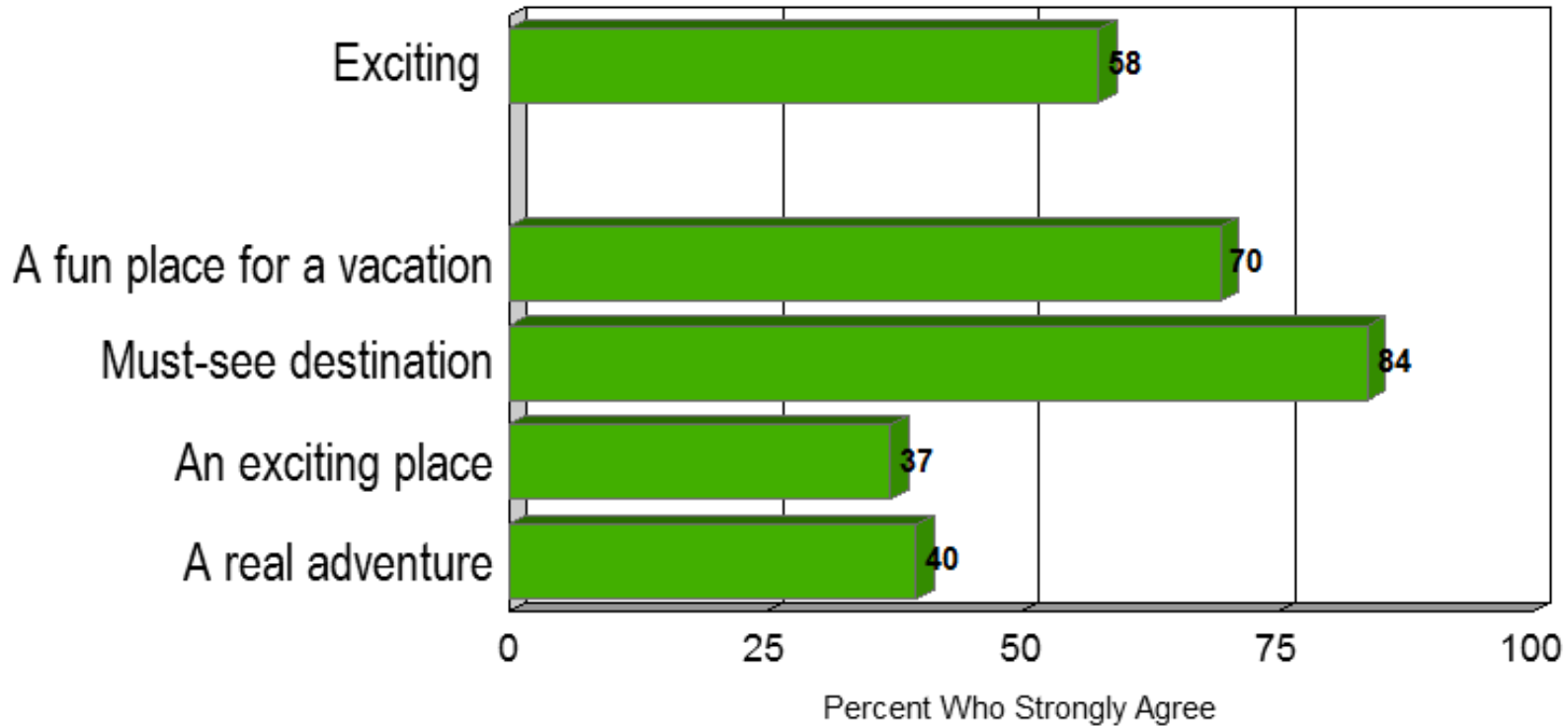


# Product Delivery

## — Exciting - 2004/2006



Base: Overnight Marketable Trips

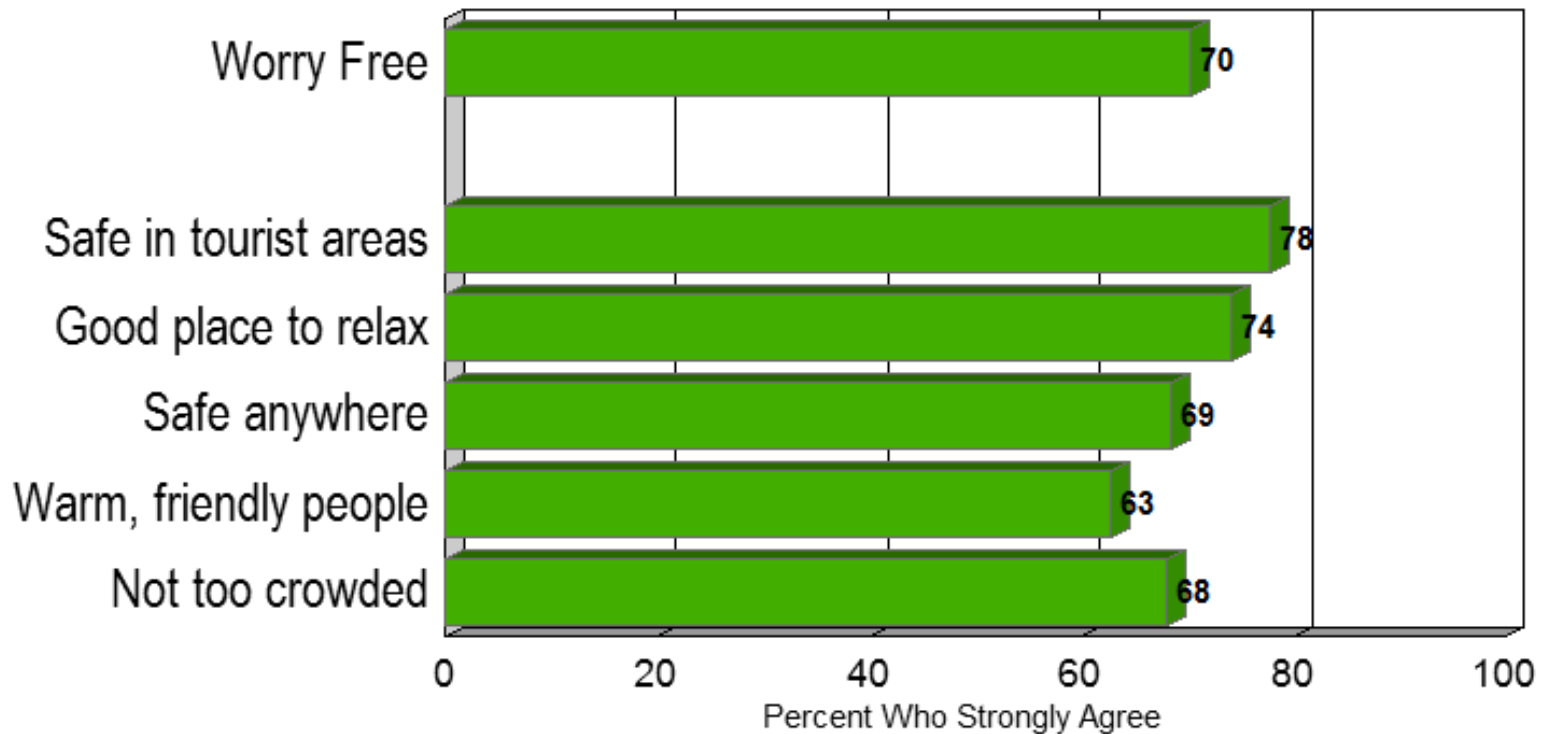


# Product Delivery

## — Worry Free - 2004/2006



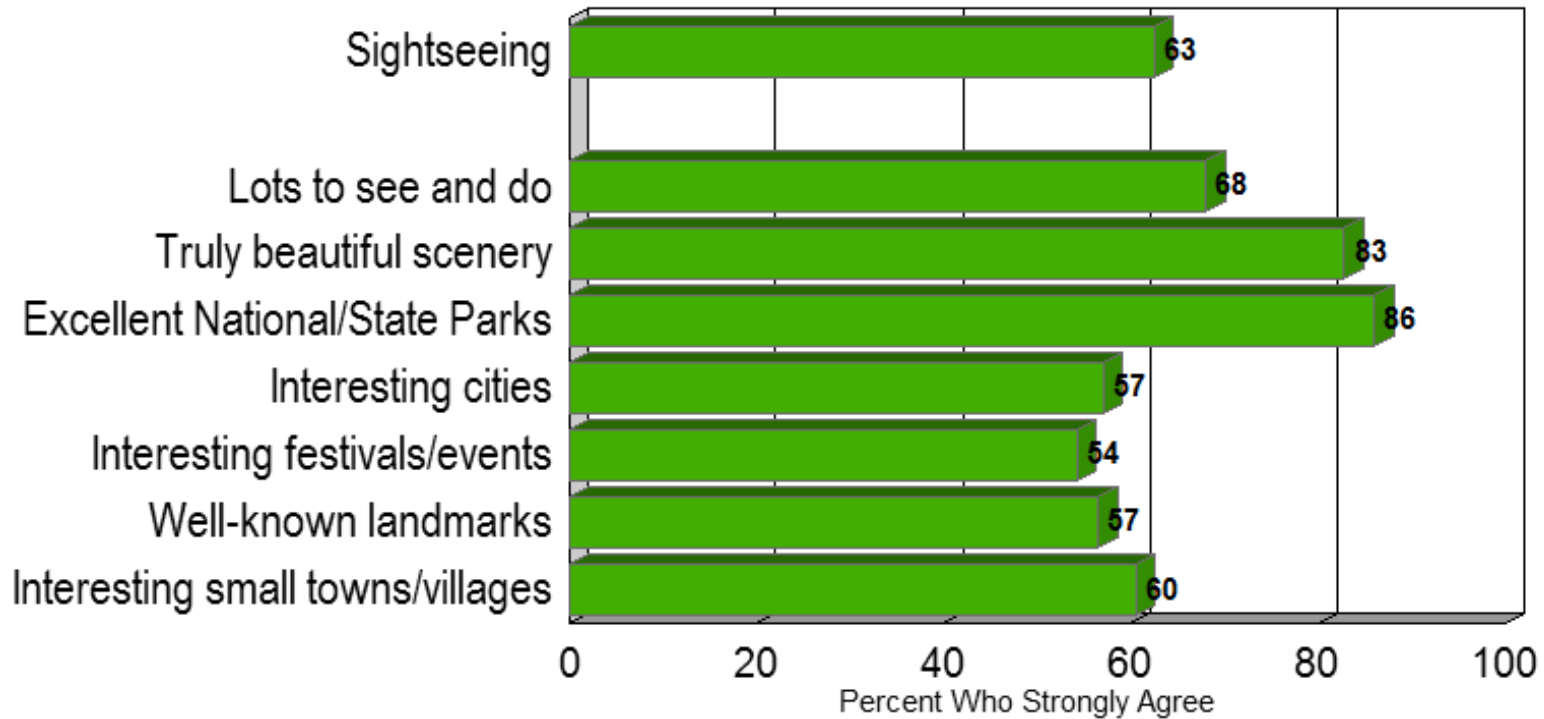
Base: Overnight Marketable Trips



# Product Delivery — Sightseeing - 2004/2006



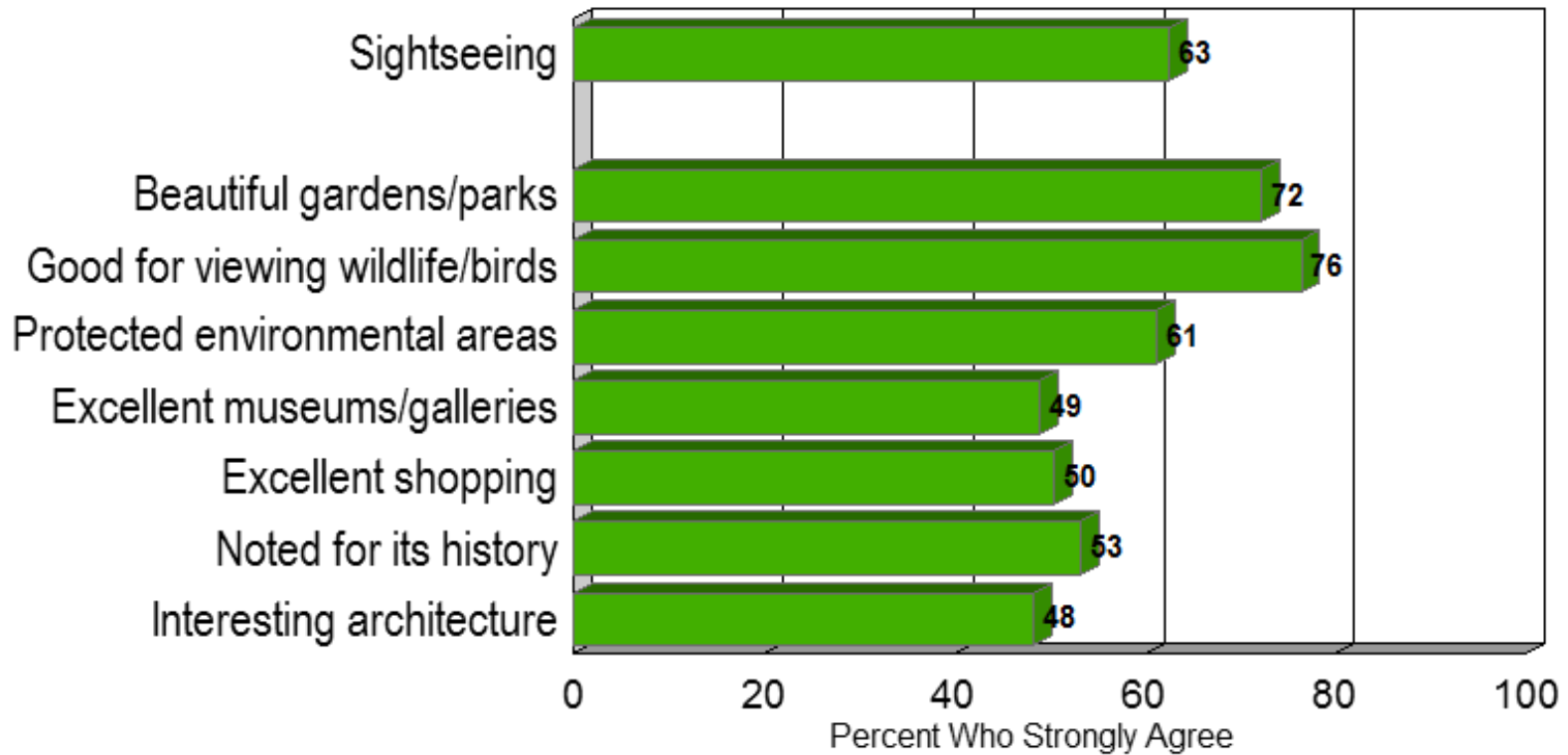
Base: Overnight Marketable Trips



# Product Delivery — Sightseeing - 2004/2006



Base: Overnight Marketable Trips

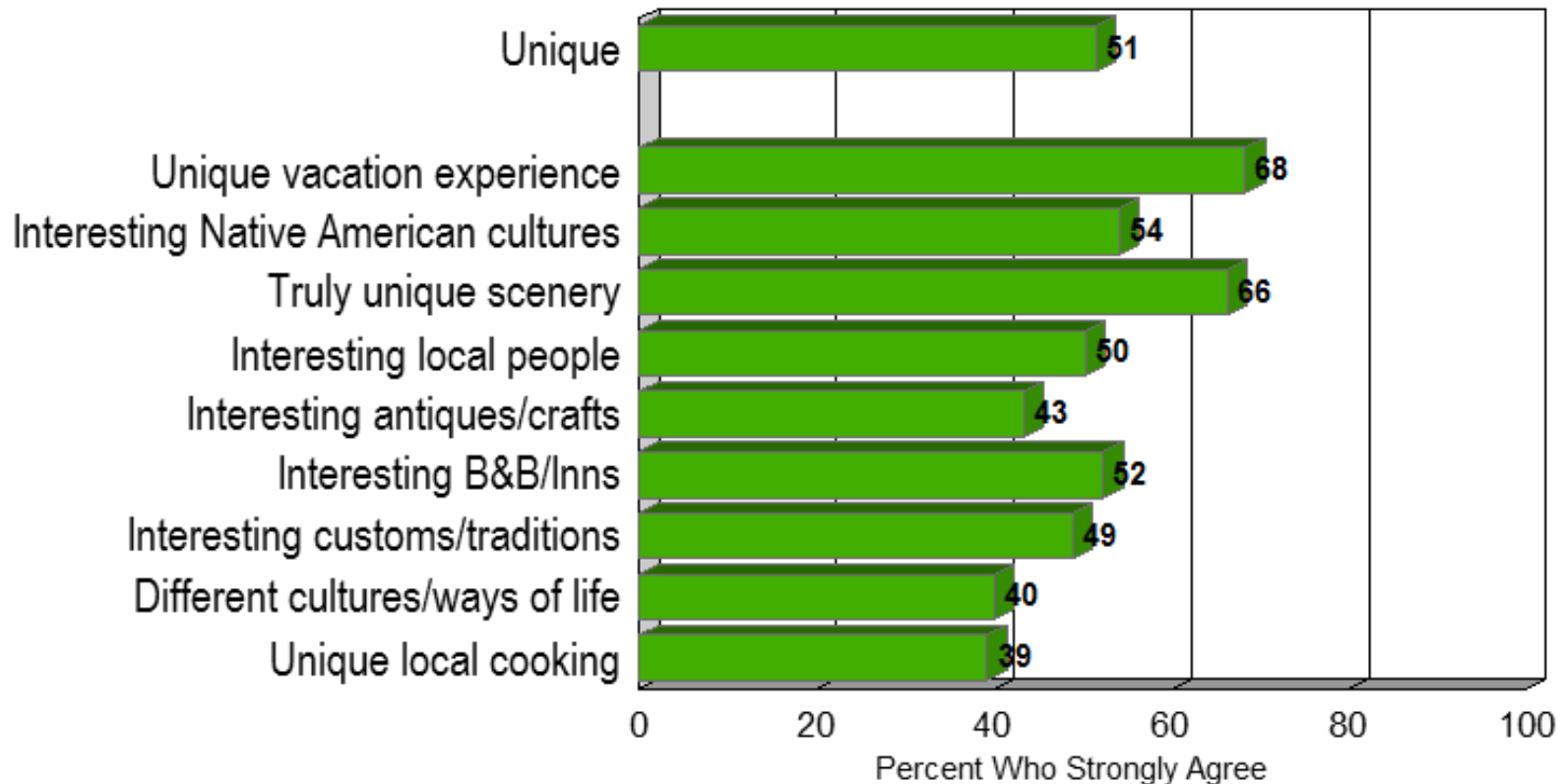


# Product Delivery

## — Unique - 2004/2006



Base: Overnight Marketable Trips

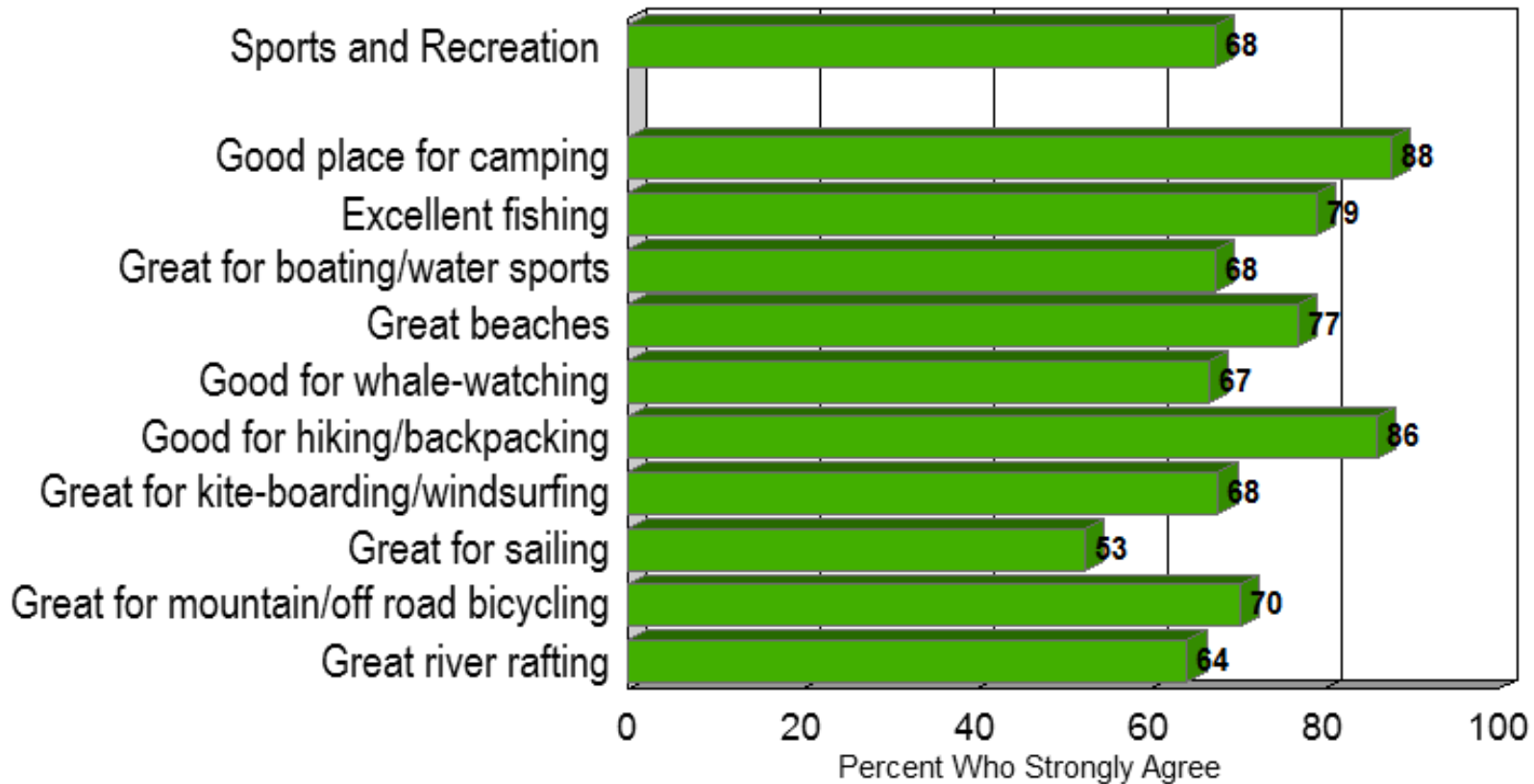


# Product Delivery

## — Sports and Recreation - 2004/2006



Base: Overnight Marketable Trips

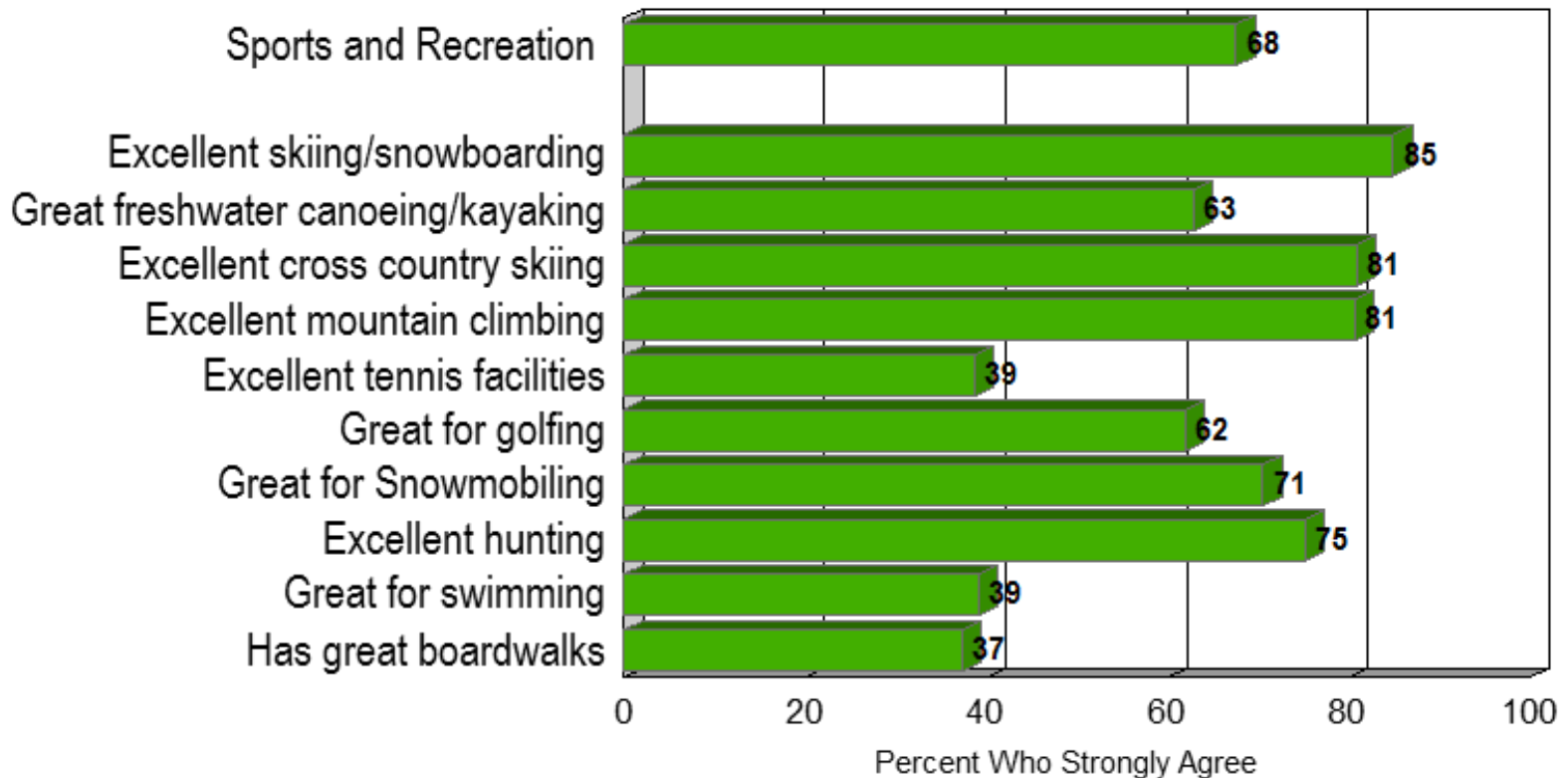


# Product Delivery

## — Sports and Recreation - 2004/2006



Base: Overnight Marketable Trips

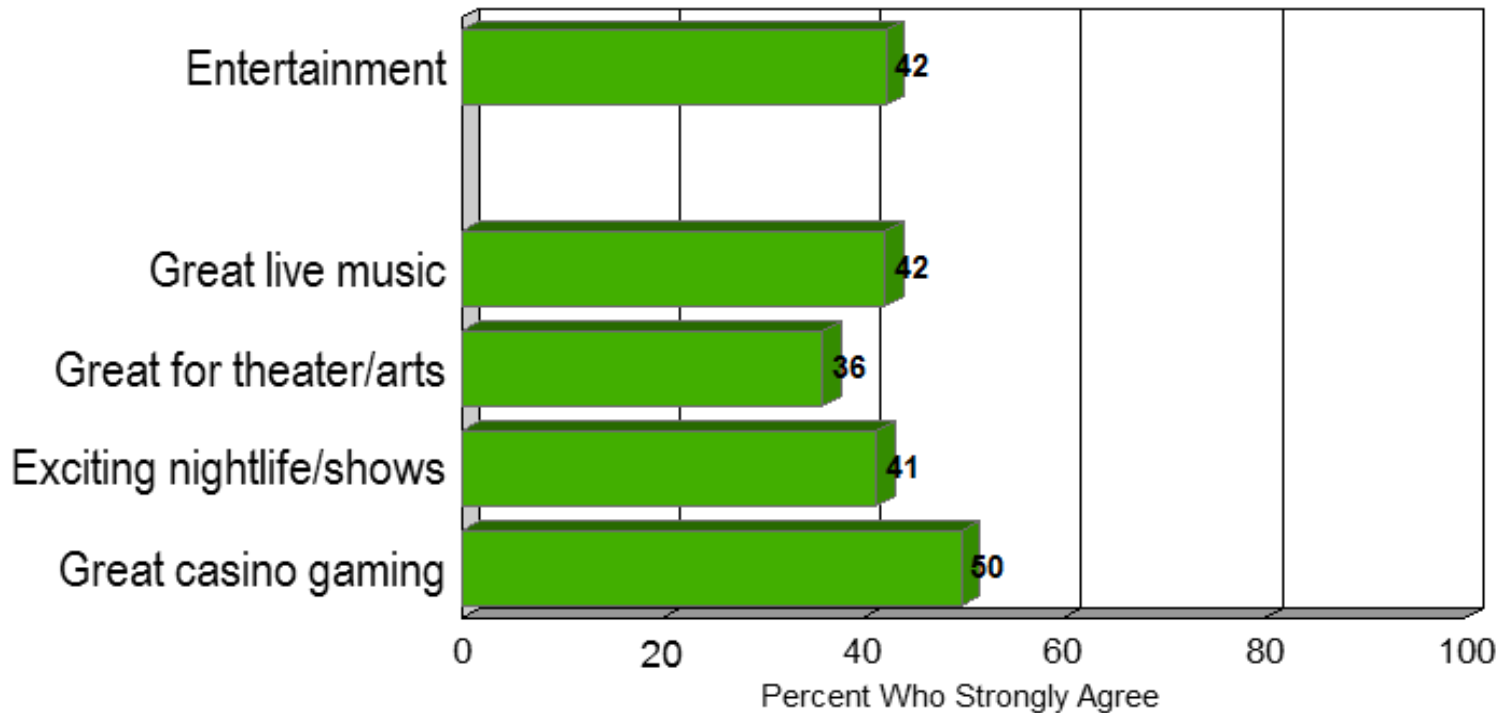


# Product Delivery

## — Entertainment - 2004/2006



Base: Overnight Marketable Trips

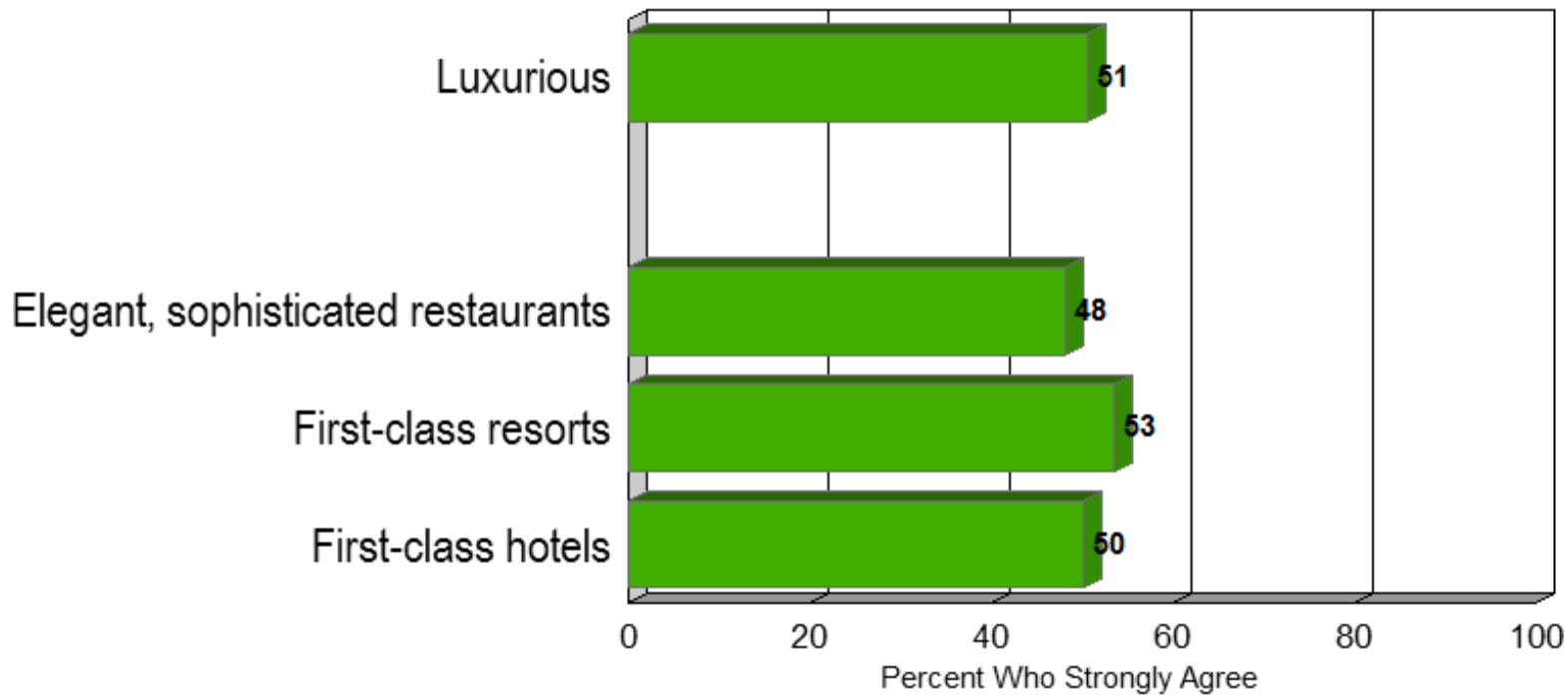


# Product Delivery

## — Luxurious - 2004/2006



Base: Overnight Marketable Trips

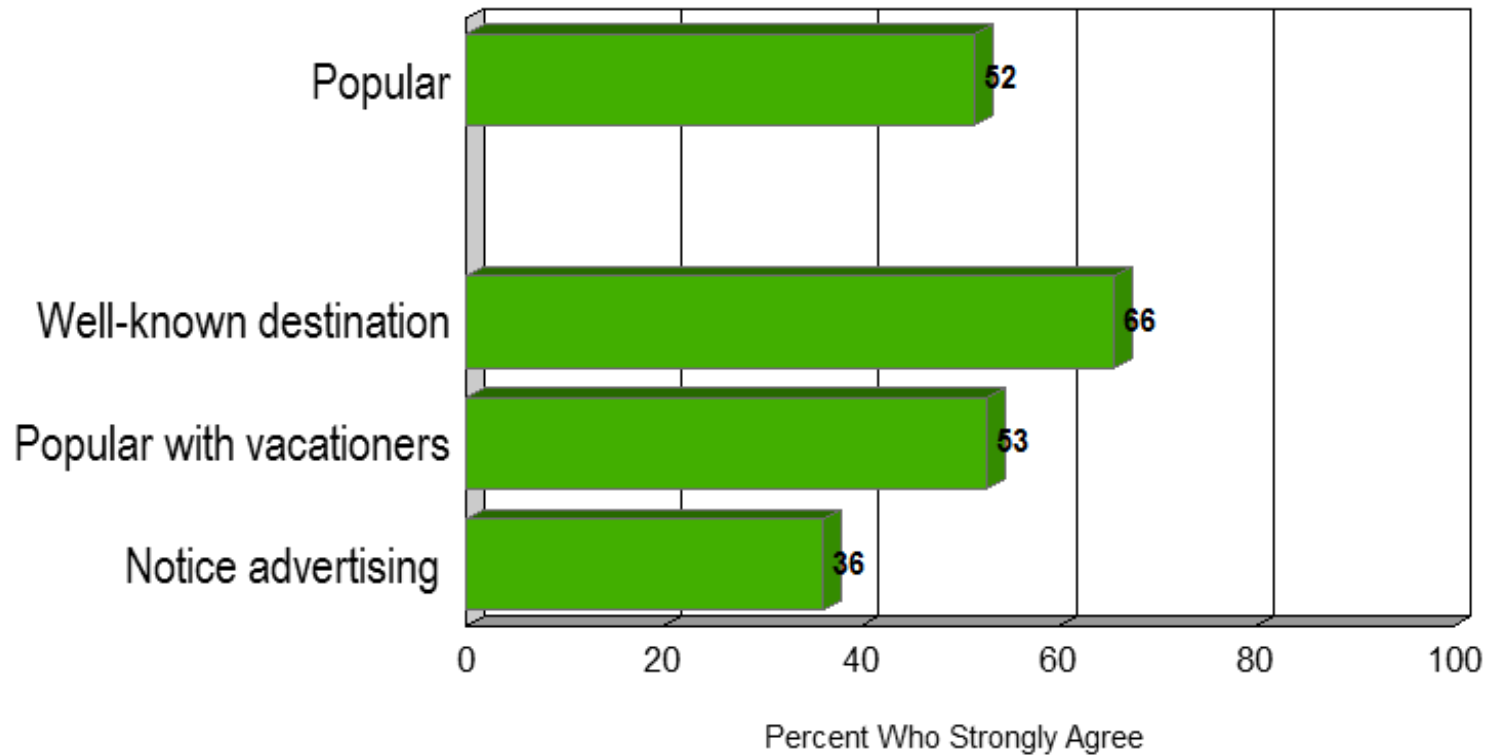


# Product Delivery

## — Popular - 2004/2006



Base: Overnight Marketable Trips

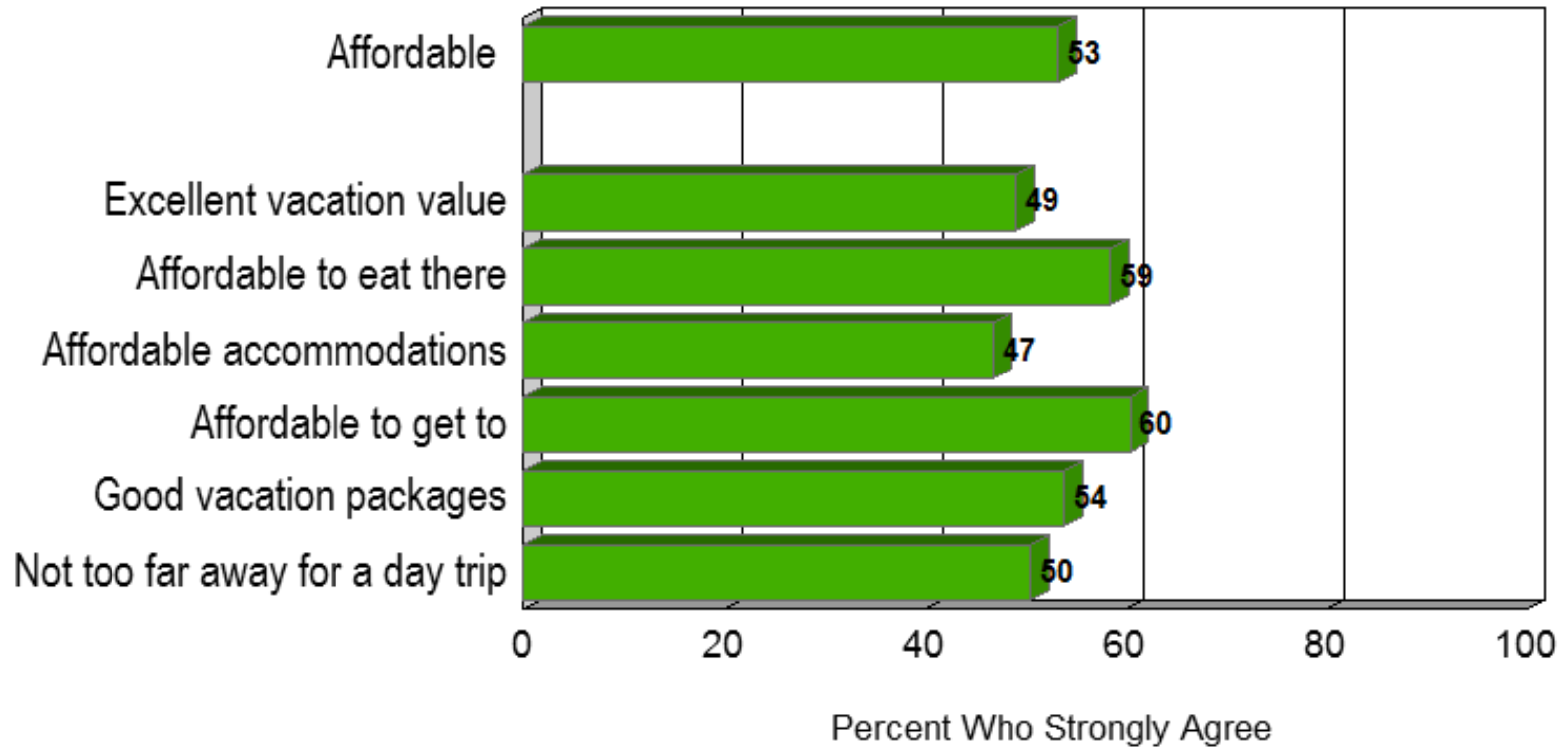


# Product Delivery

## — Affordable - 2004/2006



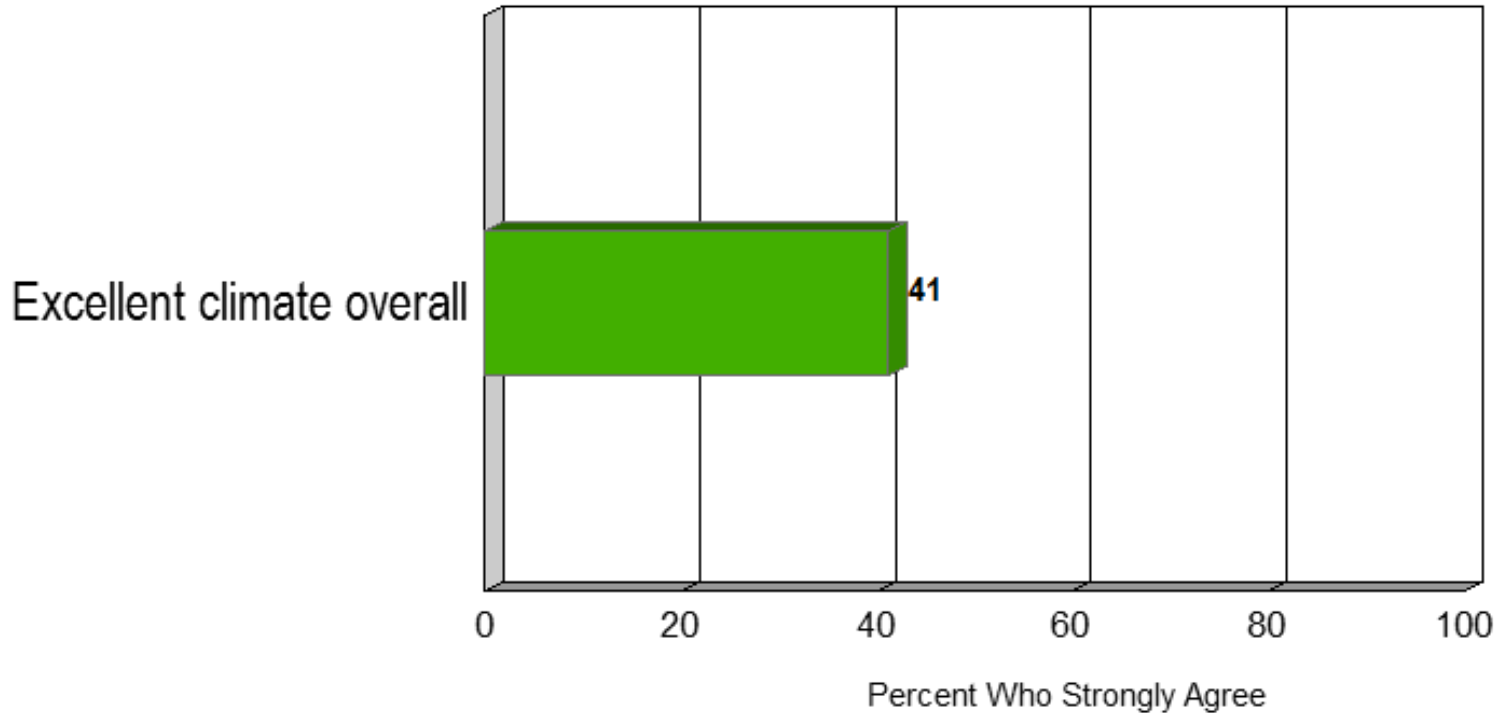
Base: Overnight Marketable Trips



# Product Delivery — Climate - 2004/2006



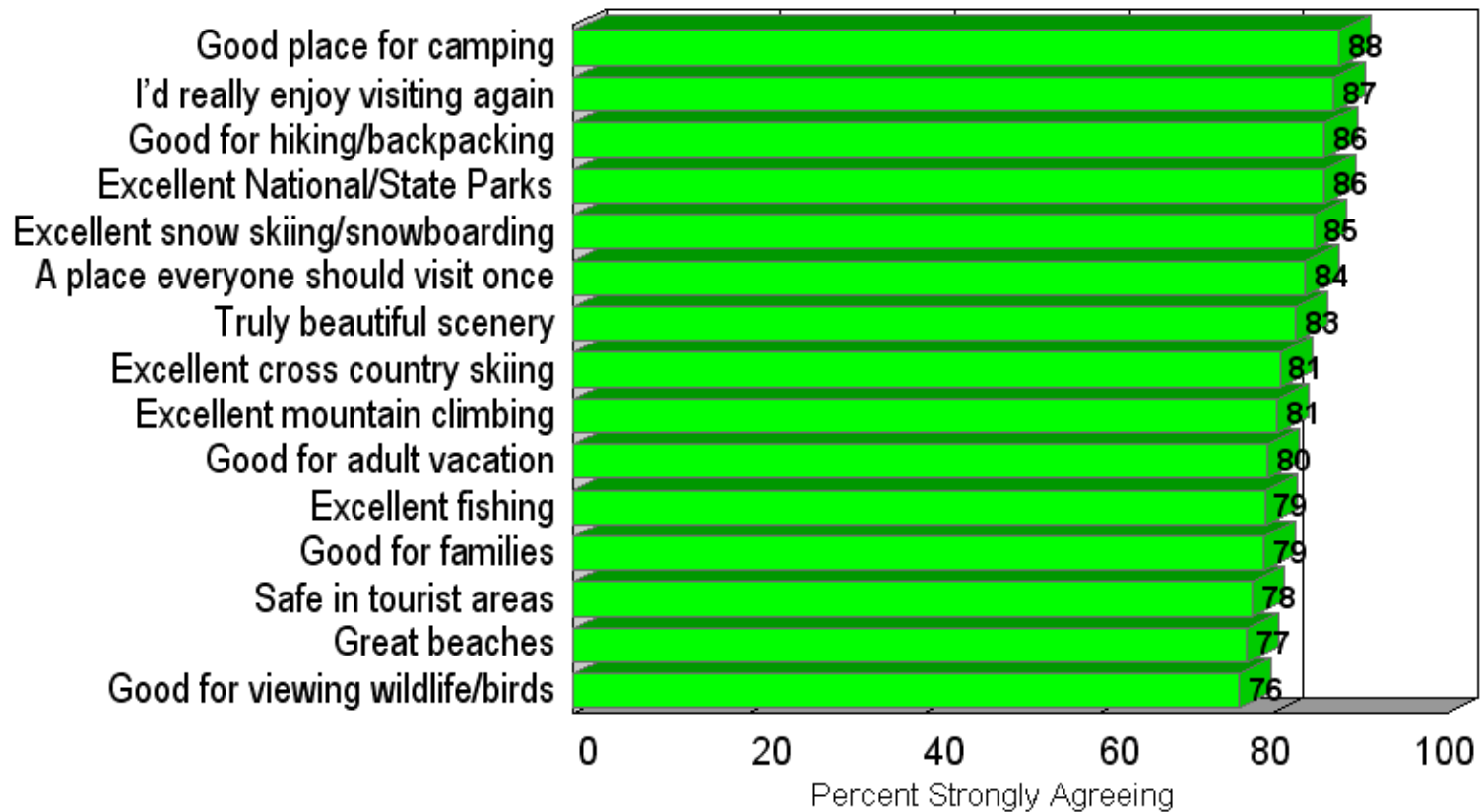
Base: Overnight Marketable Trips



# Product Strengths — 2004/2006



Base: Overnight Marketable Trips

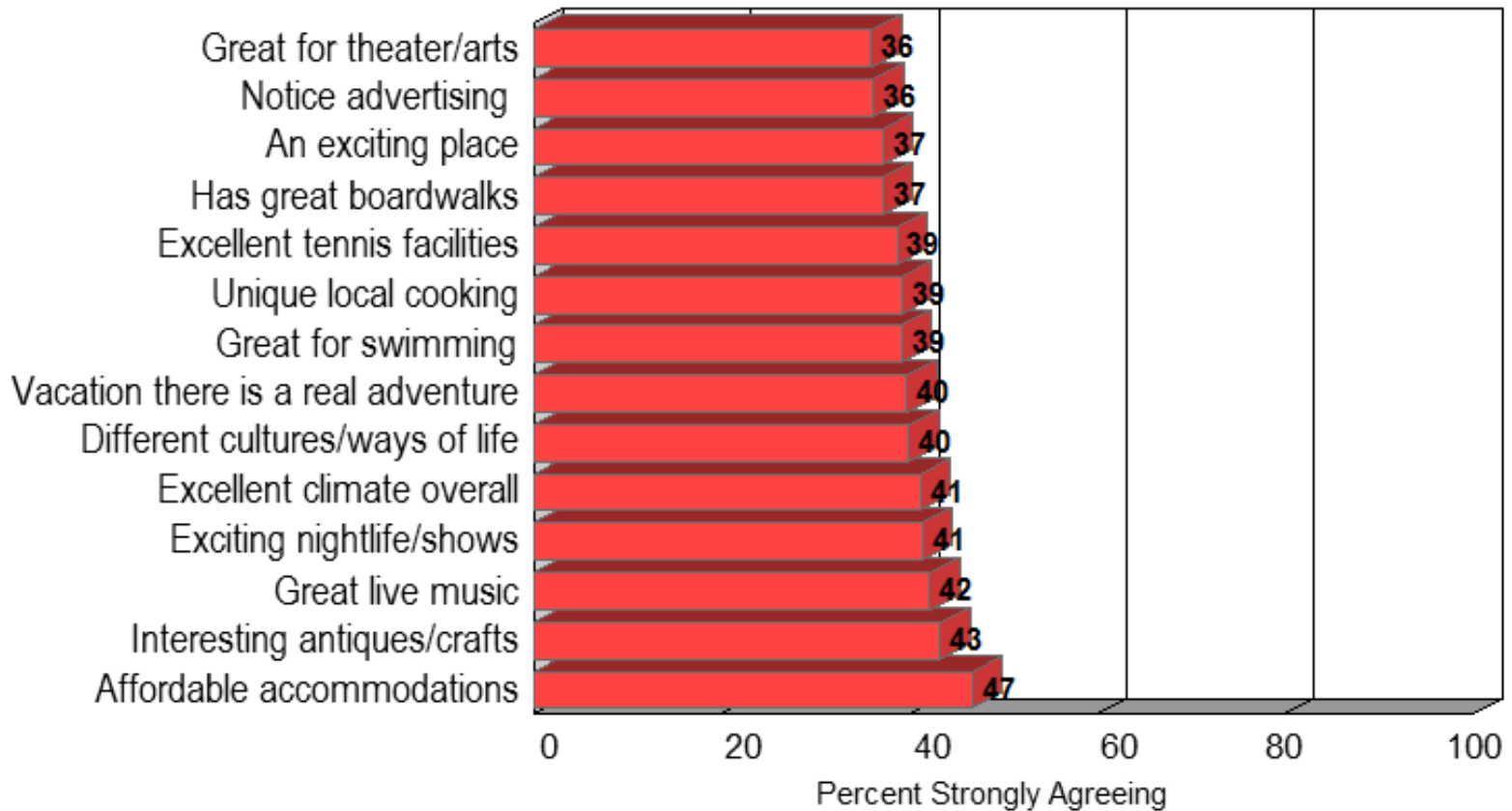


# Product Weaknesses

## — 2004/2006



Base: Overnight Marketable Trips



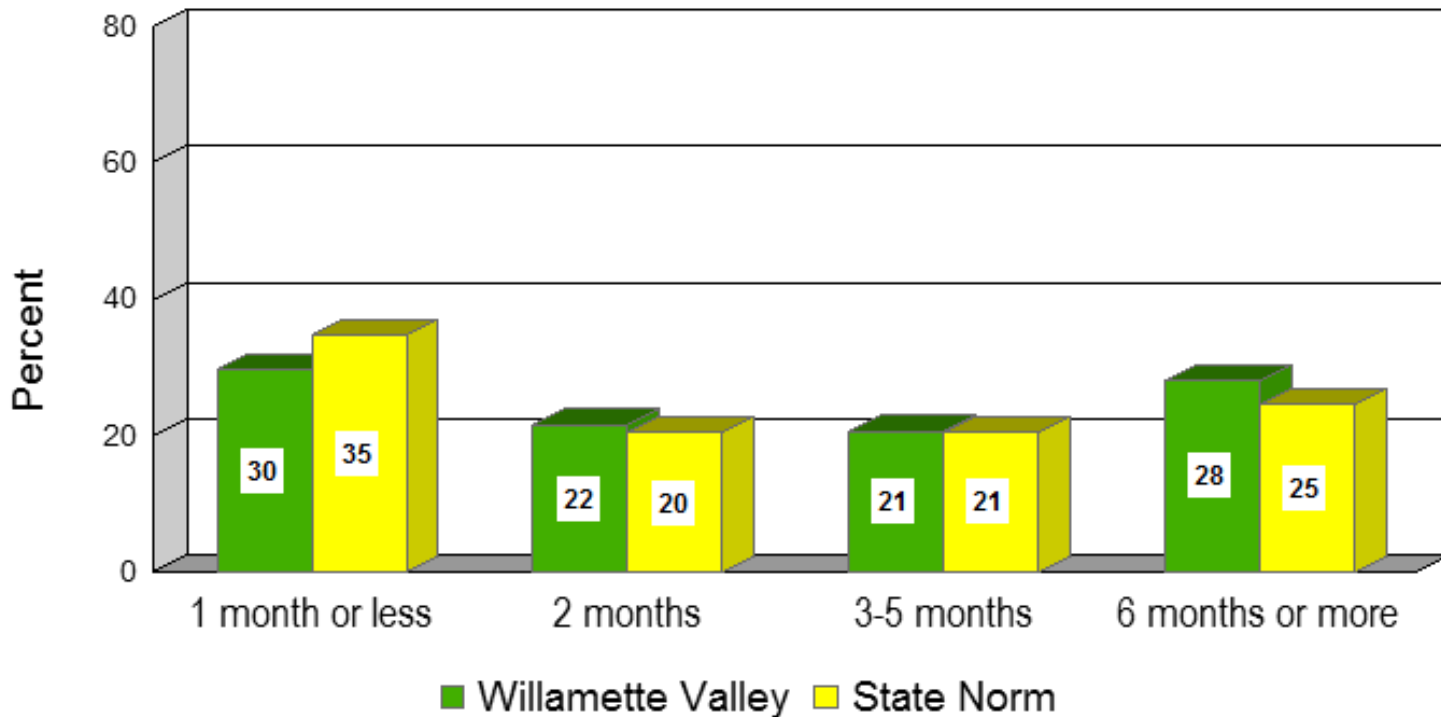
APPENDIX A  
The Willamette Valley Region  
Marketable Trip Characteristics,  
Visitor Profile and Imagery  
— 2006

# Marketable Trip Characteristics — 2006

# Planning Cycle — 2006



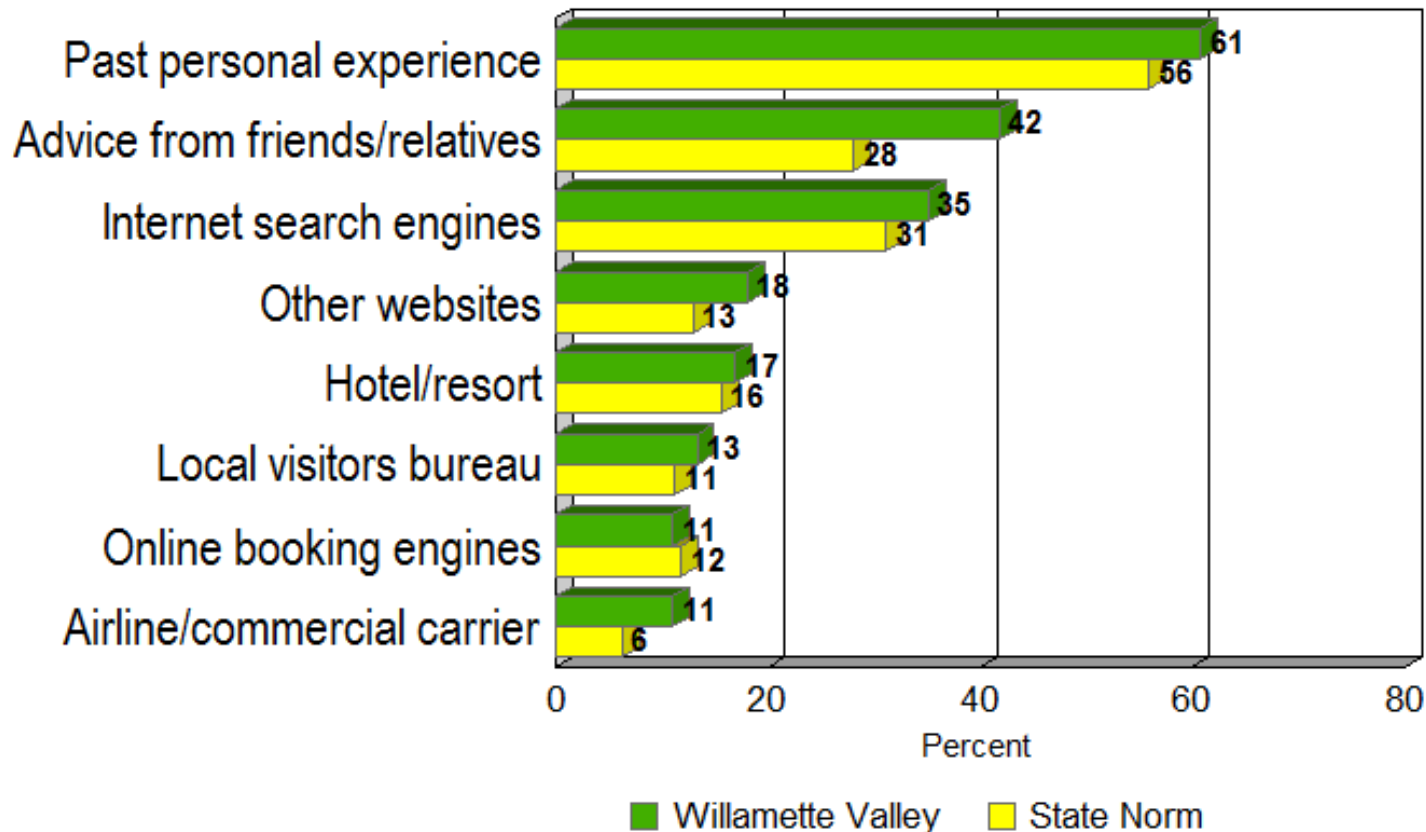
Base: Overnight Marketable Trips Planned in Advance



# Information Sources Used for Planning — 2006



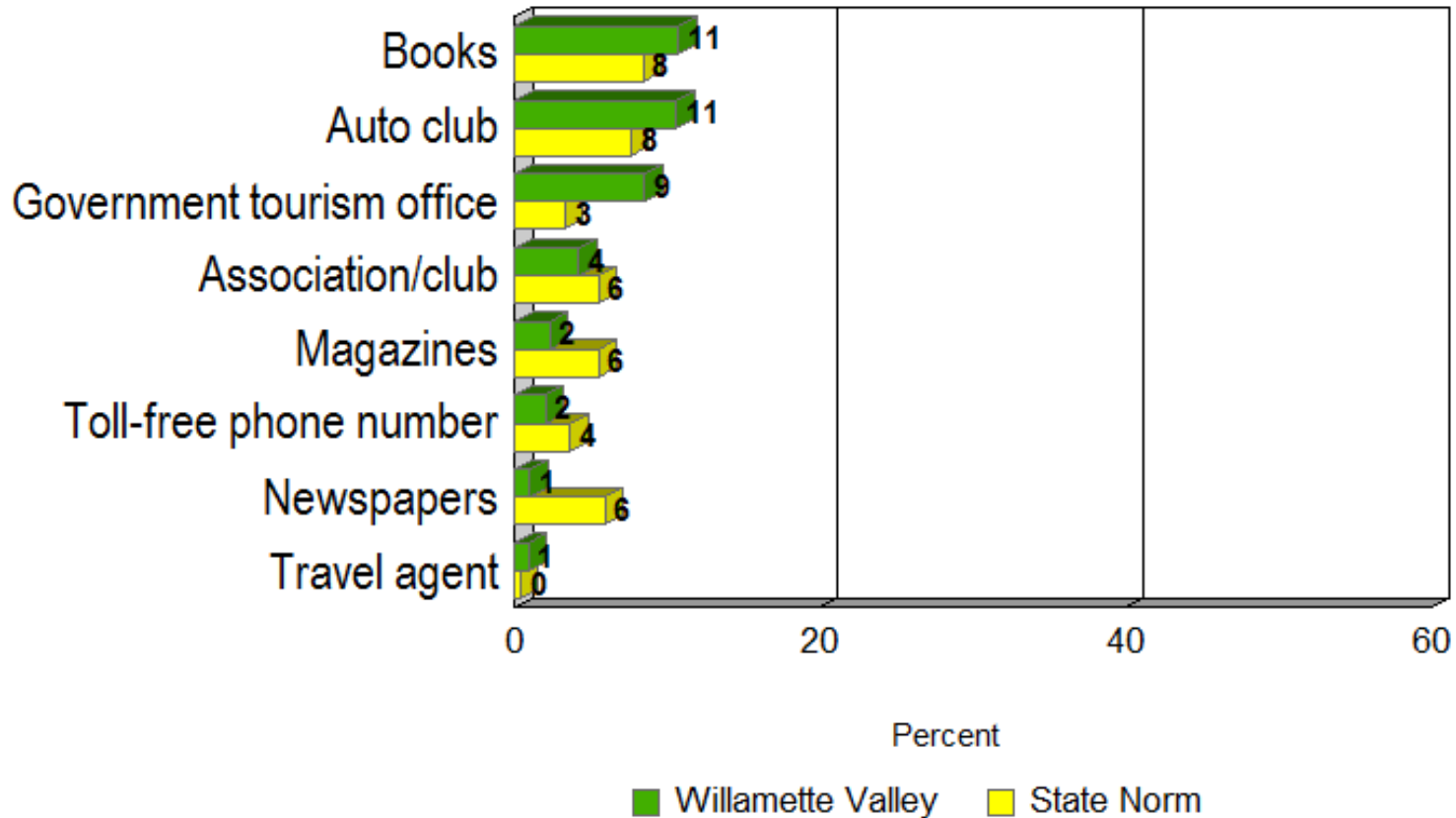
Base: Overnight Marketable Trips



# Information Sources Used for Planning — 2006 (Cont'd)



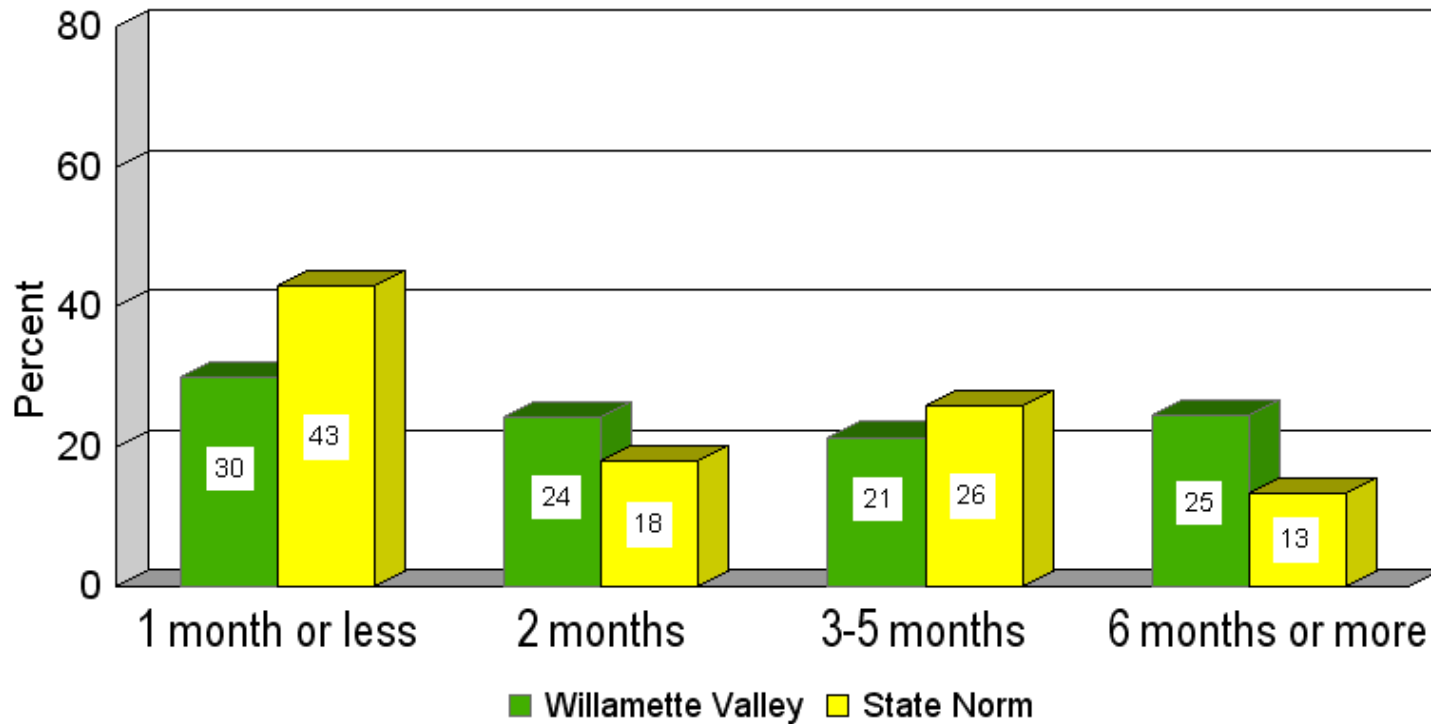
Base: Overnight Marketable Trips



# Booking Cycle — 2006



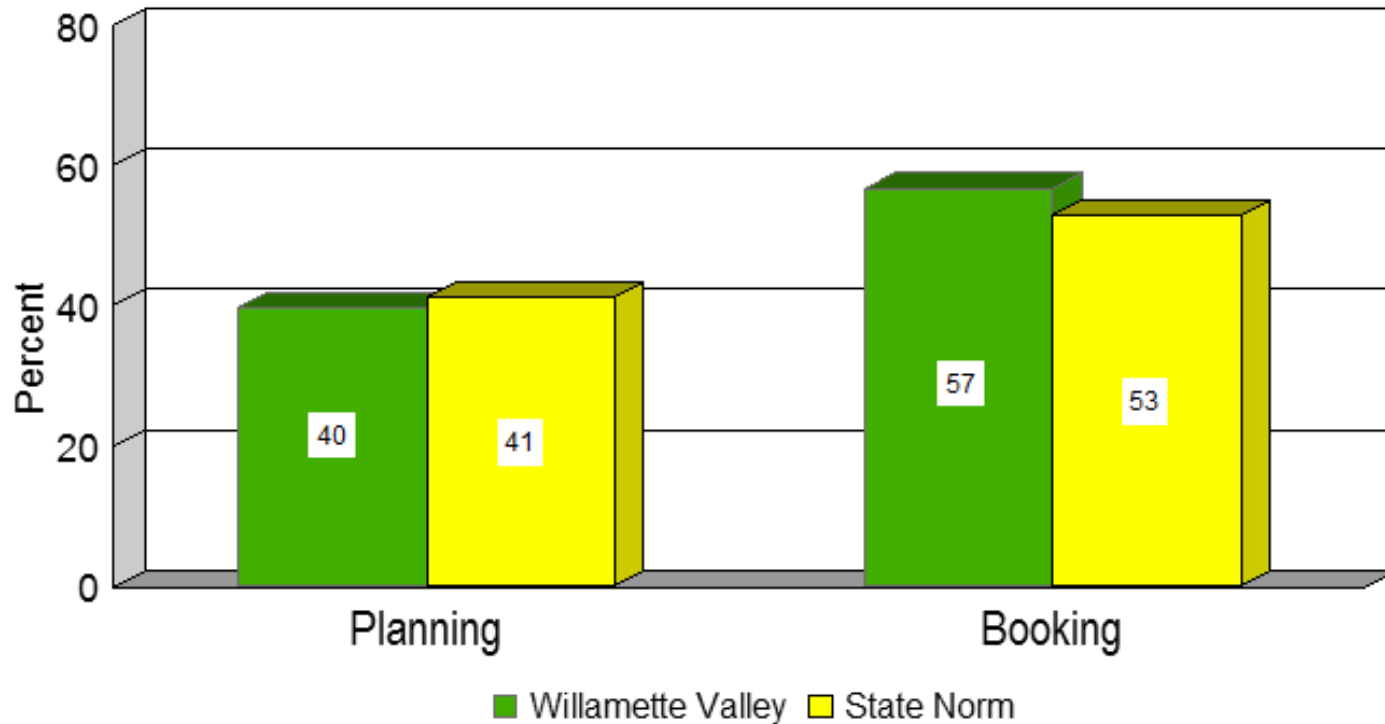
Base: Overnight Marketable Trips Booked in Advance



# Use of Internet for Trip Planning and Booking — 2006



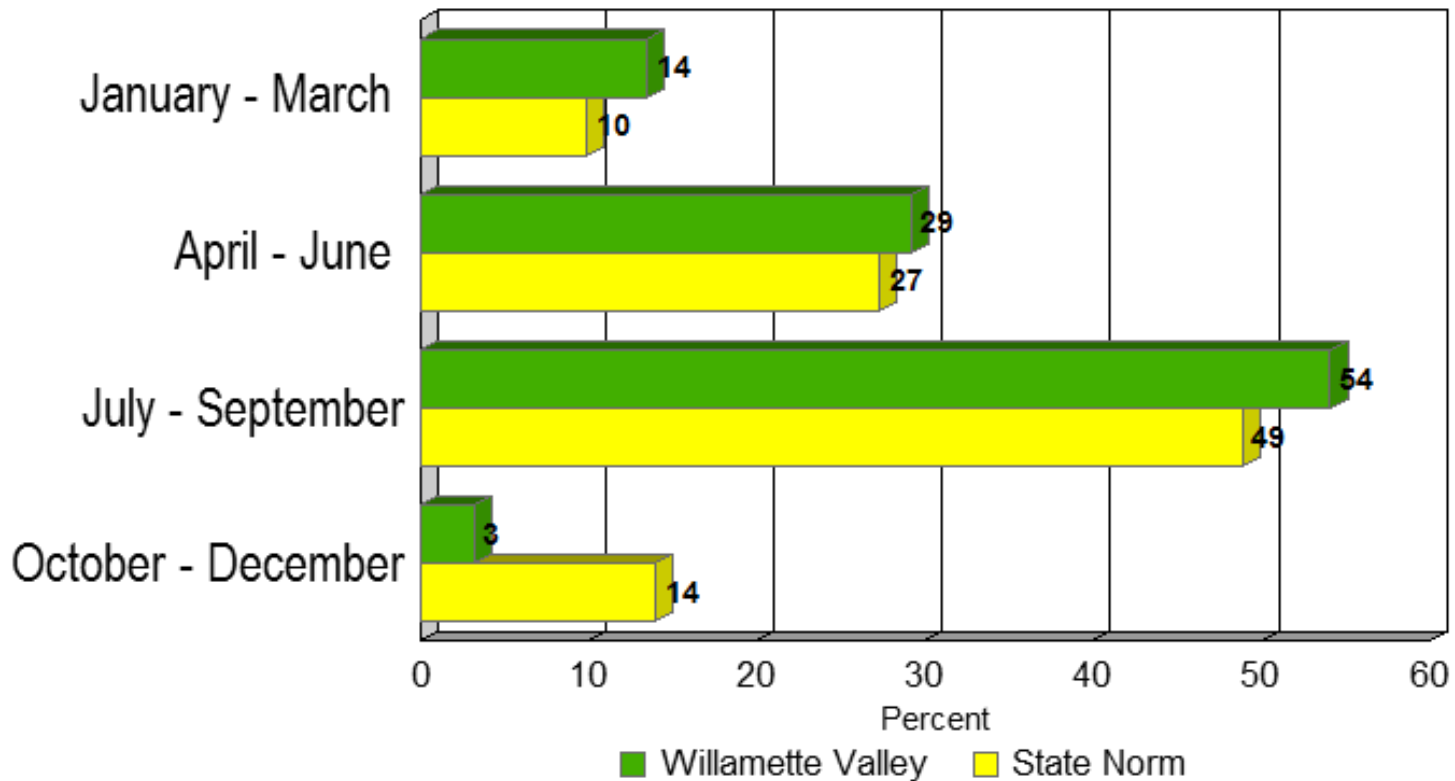
Base: Overnight Marketable Trips



# Trip Seasonality — 2006



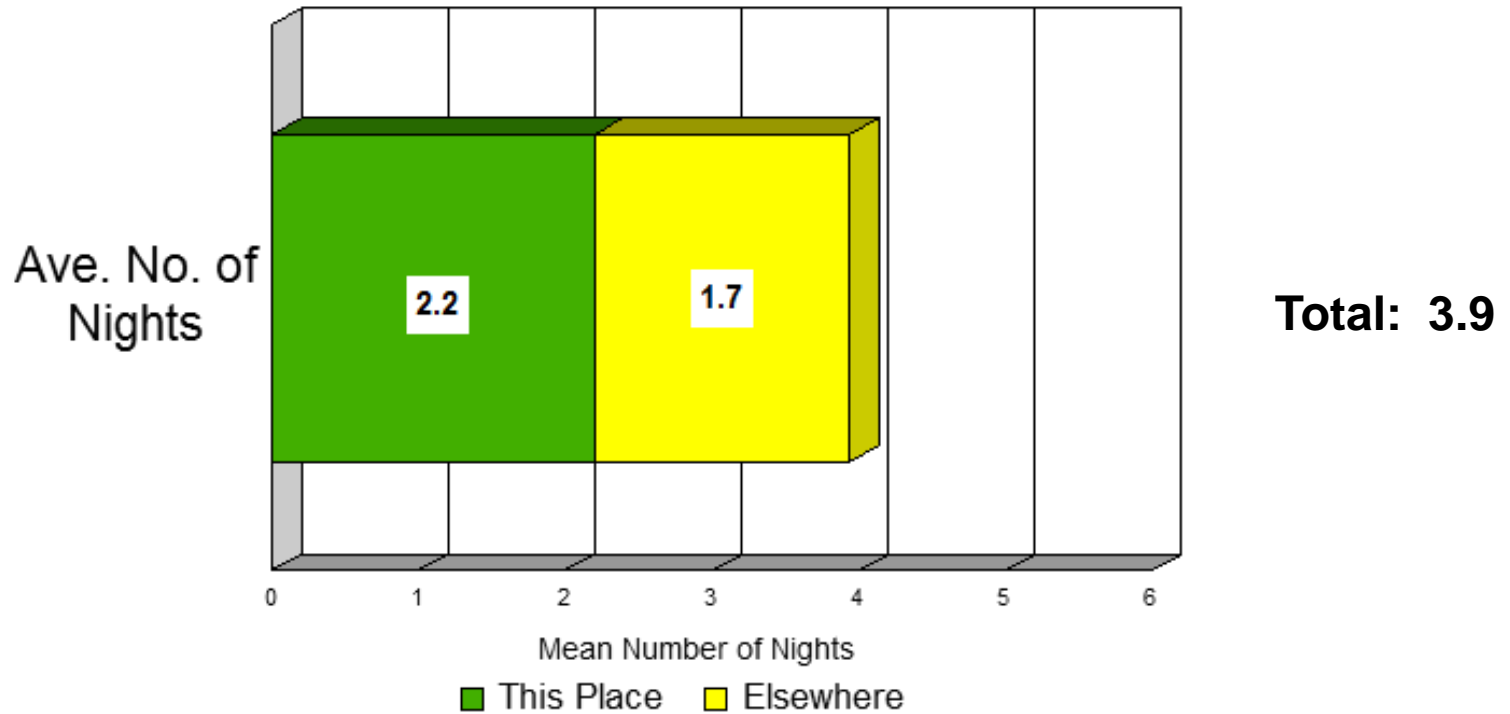
Base: Overnight Marketable Trips



# Length of Stay — 2006



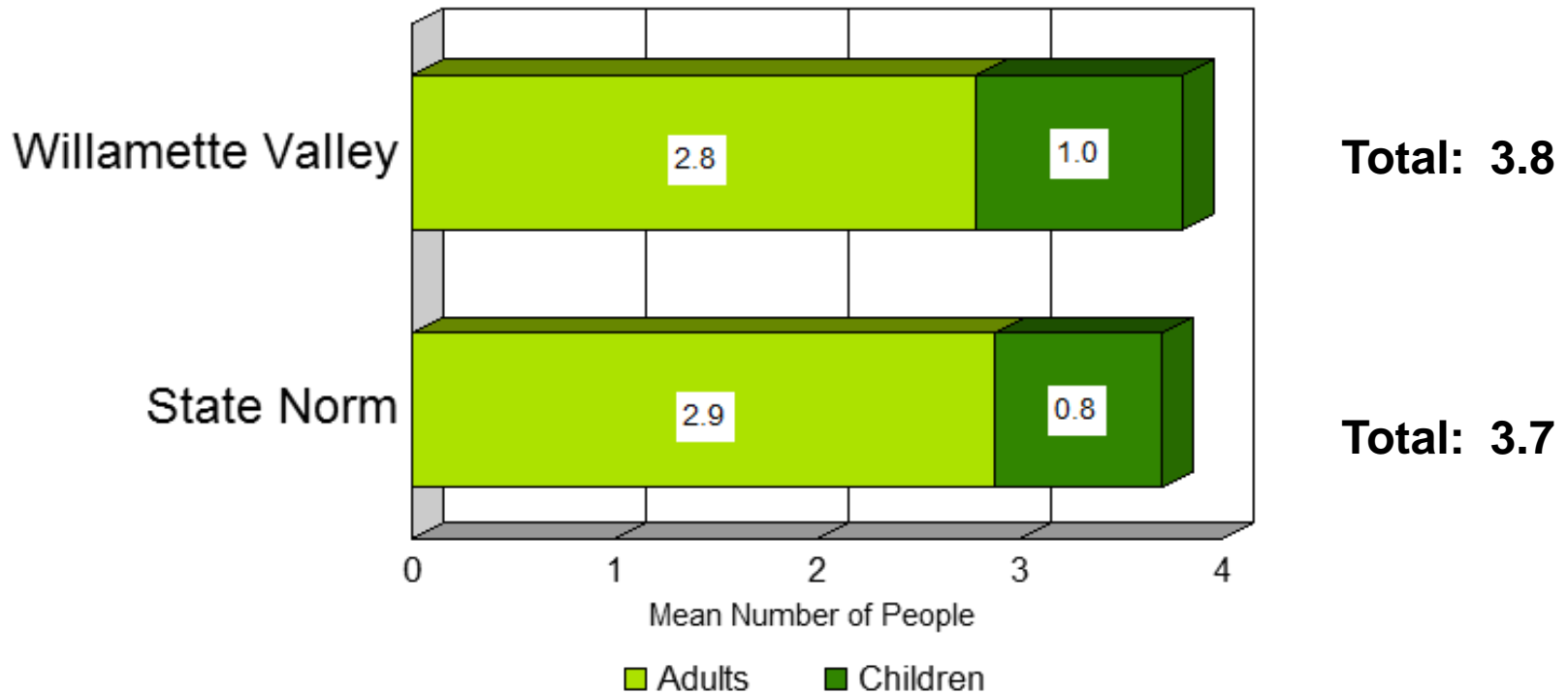
Base: Overnight Marketable Trips



# Size of Travel Party — 2006



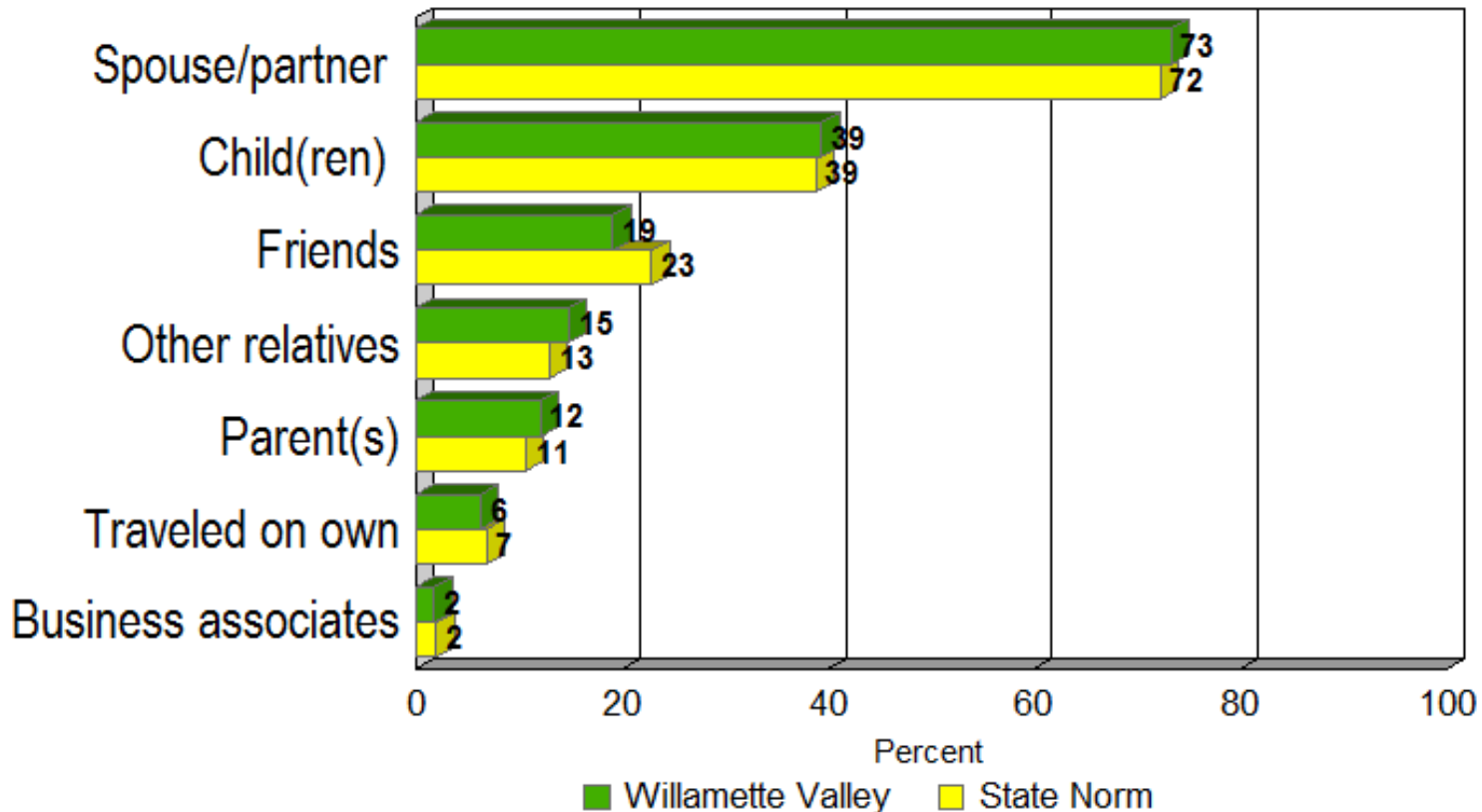
Base: Overnight Marketable Trips



# Travel Party Composition — 2006



Base: Overnight Marketable Trips

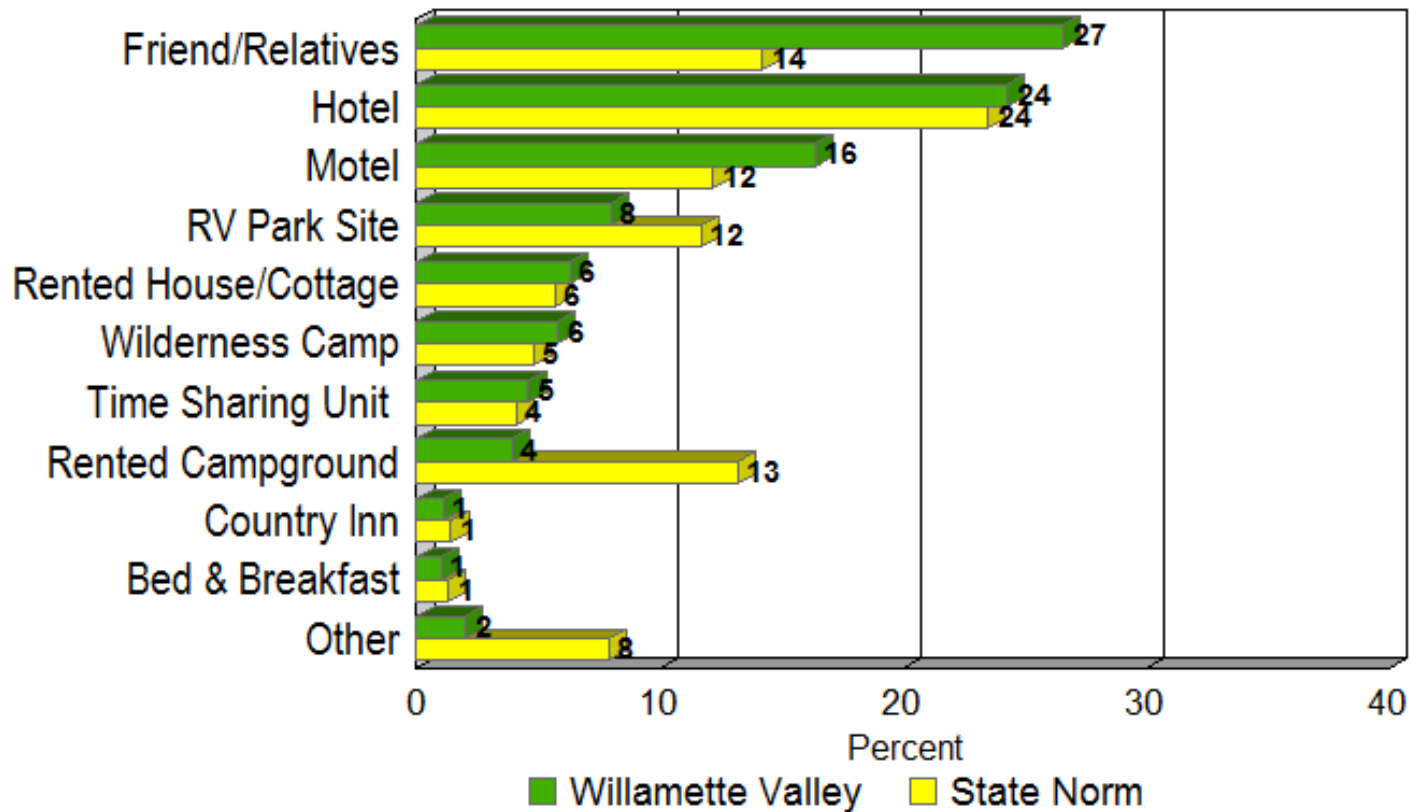


# Accommodation Used\*

## — 2006



Base: Overnight Marketable Trips



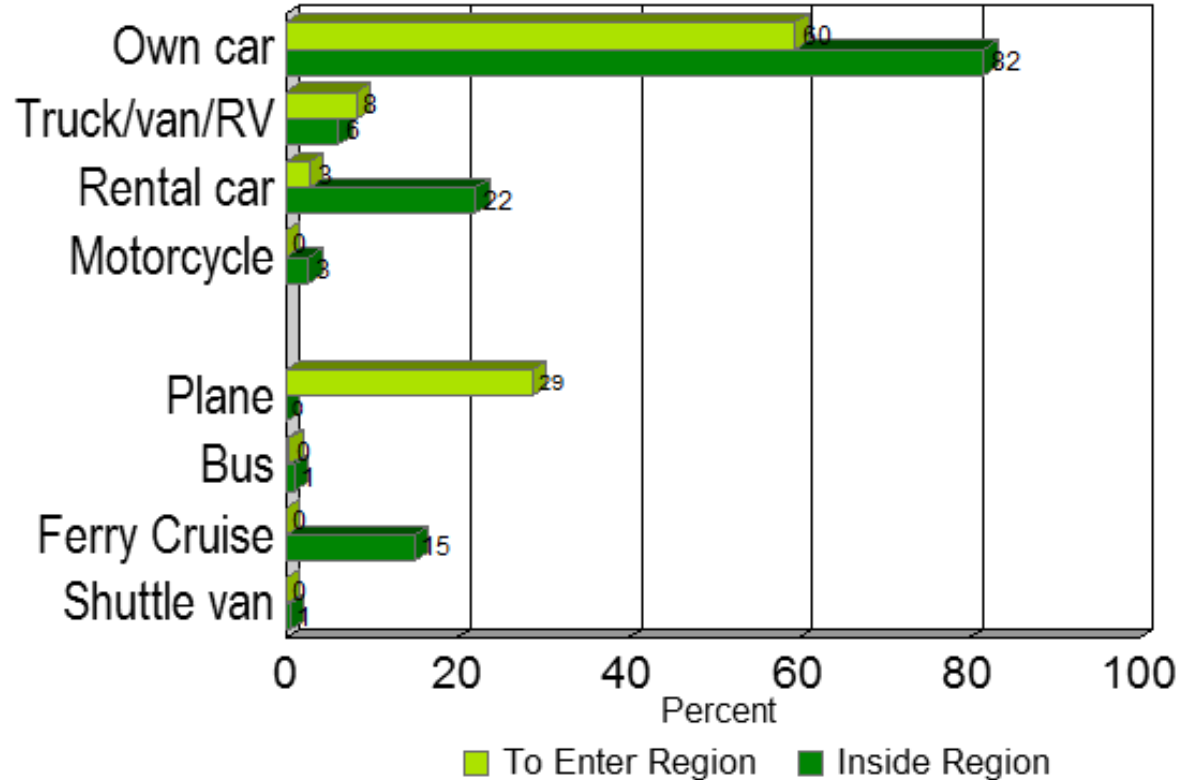
\* Percent of trip nights spent in each type of accommodation

# Transportation Used — 2006



Base: Overnight Marketable Trips

## *Personal*

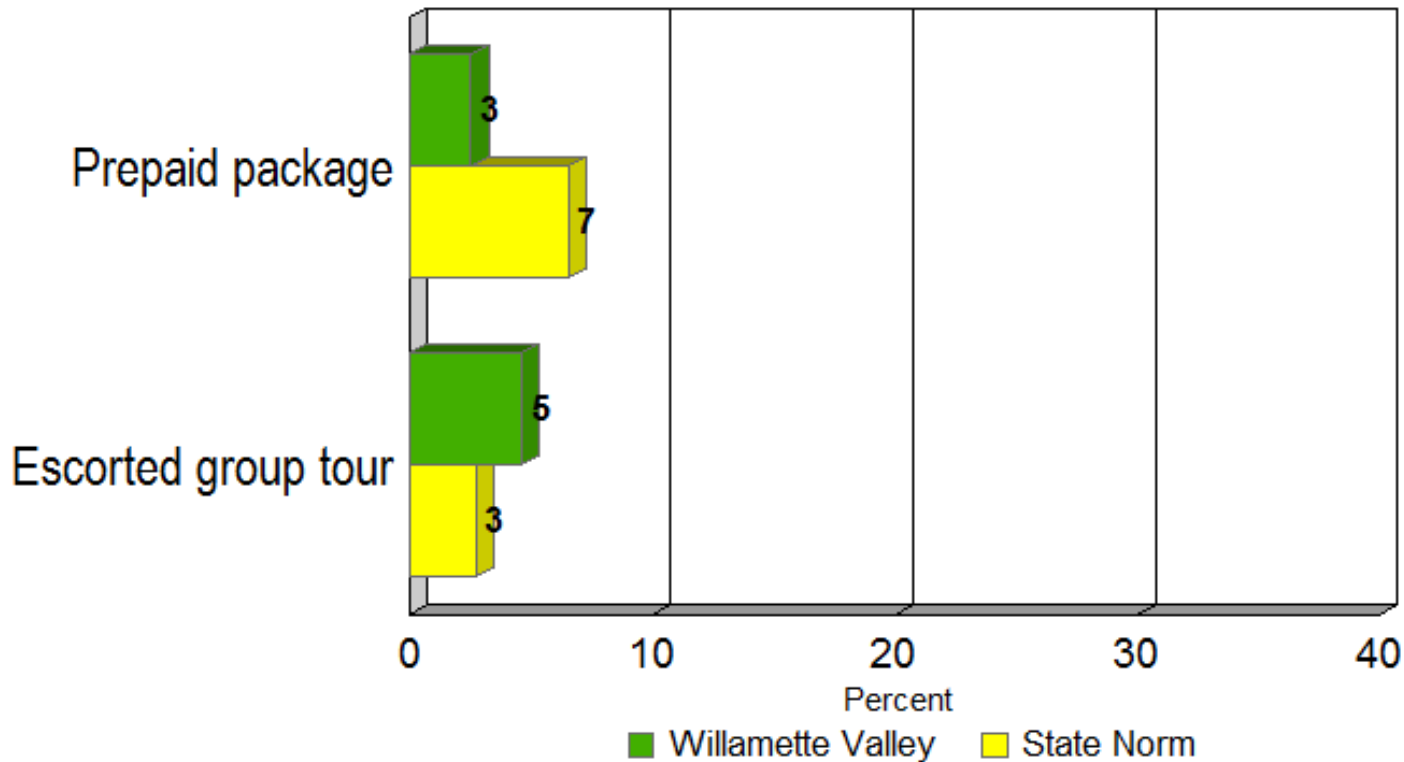


## *Commercial*

# Use of Vacation Packages and Group Travel — 2006



Base: Overnight Marketable Trips

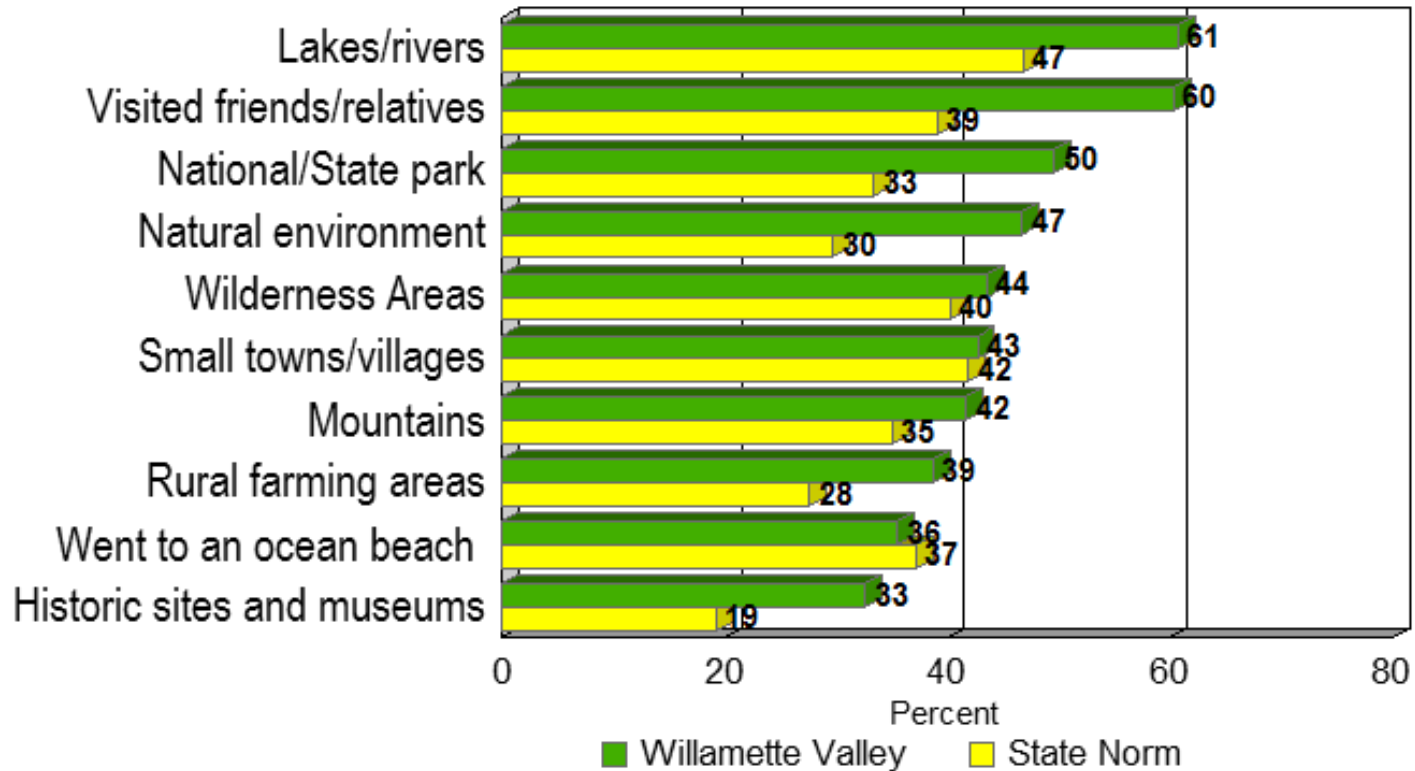


# Marketable Trip Experiences — 2006

# Experiences and Sightseeing — 2006



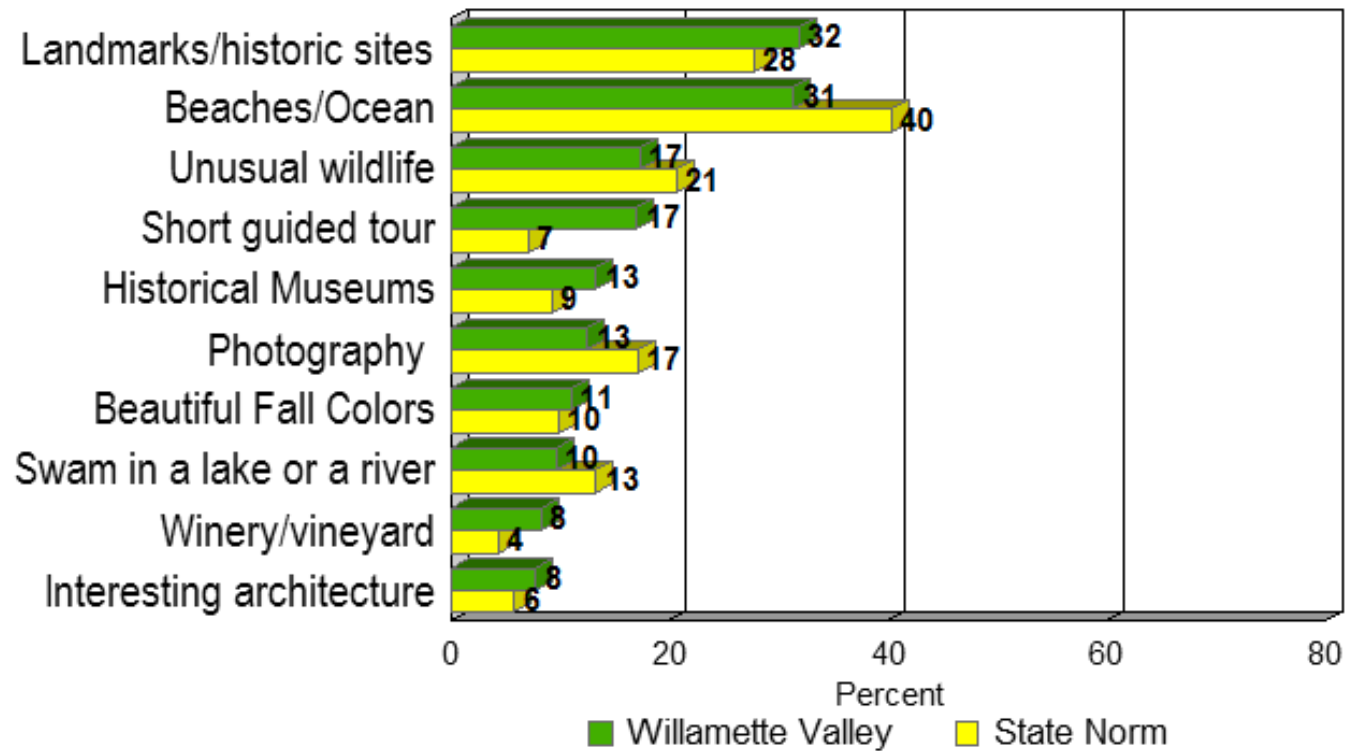
Base: Overnight Marketable Trips



# Experiences and Sightseeing — 2006 (Cont'd)



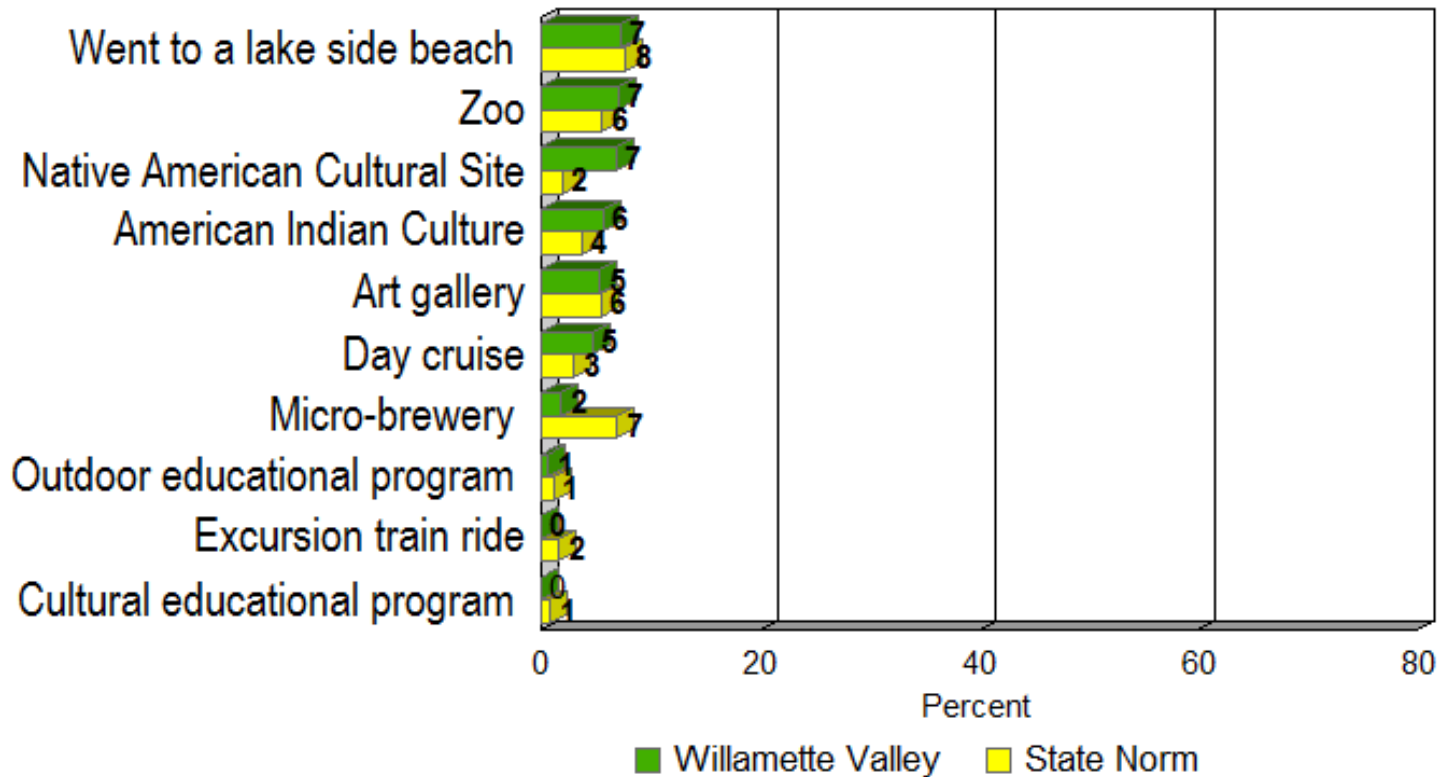
Base: Overnight Marketable Trips



# Experiences and Sightseeing — 2006(Cont'd)



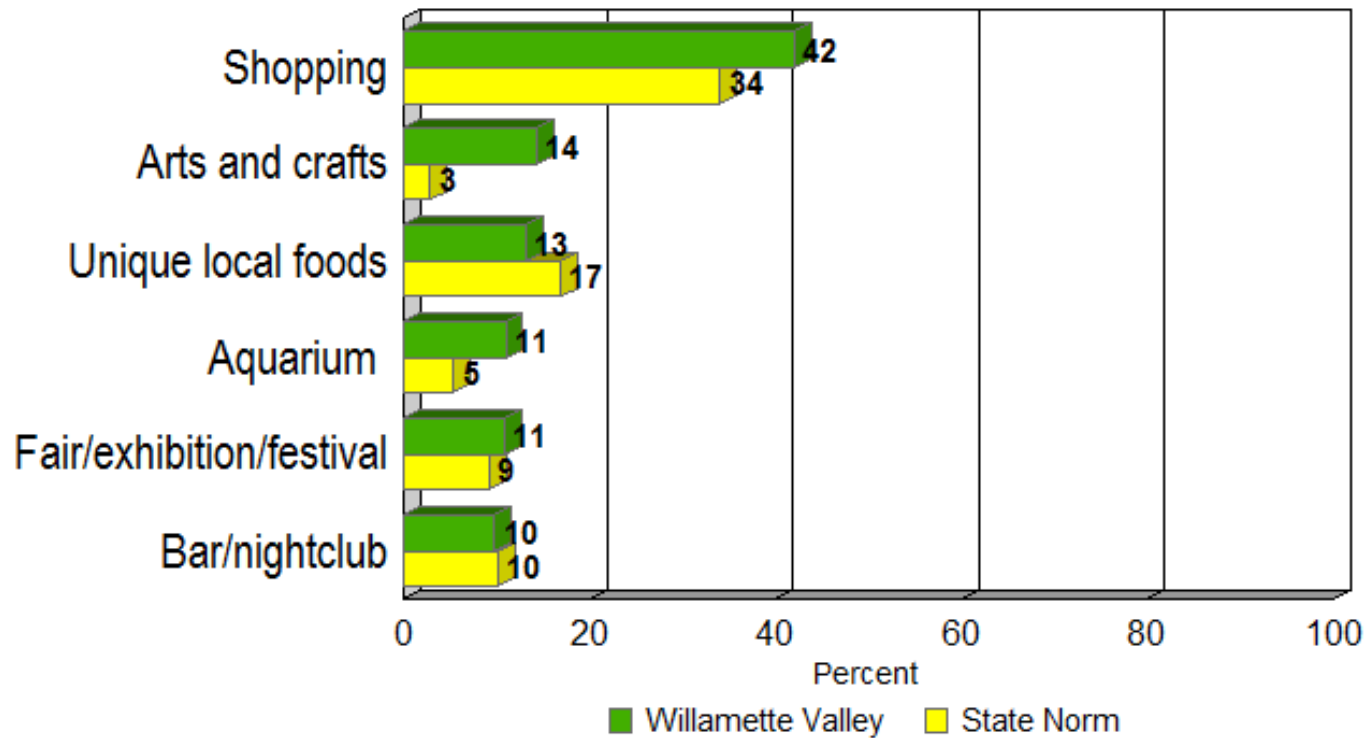
Base: Overnight Marketable Trips



# Entertainment — 2006



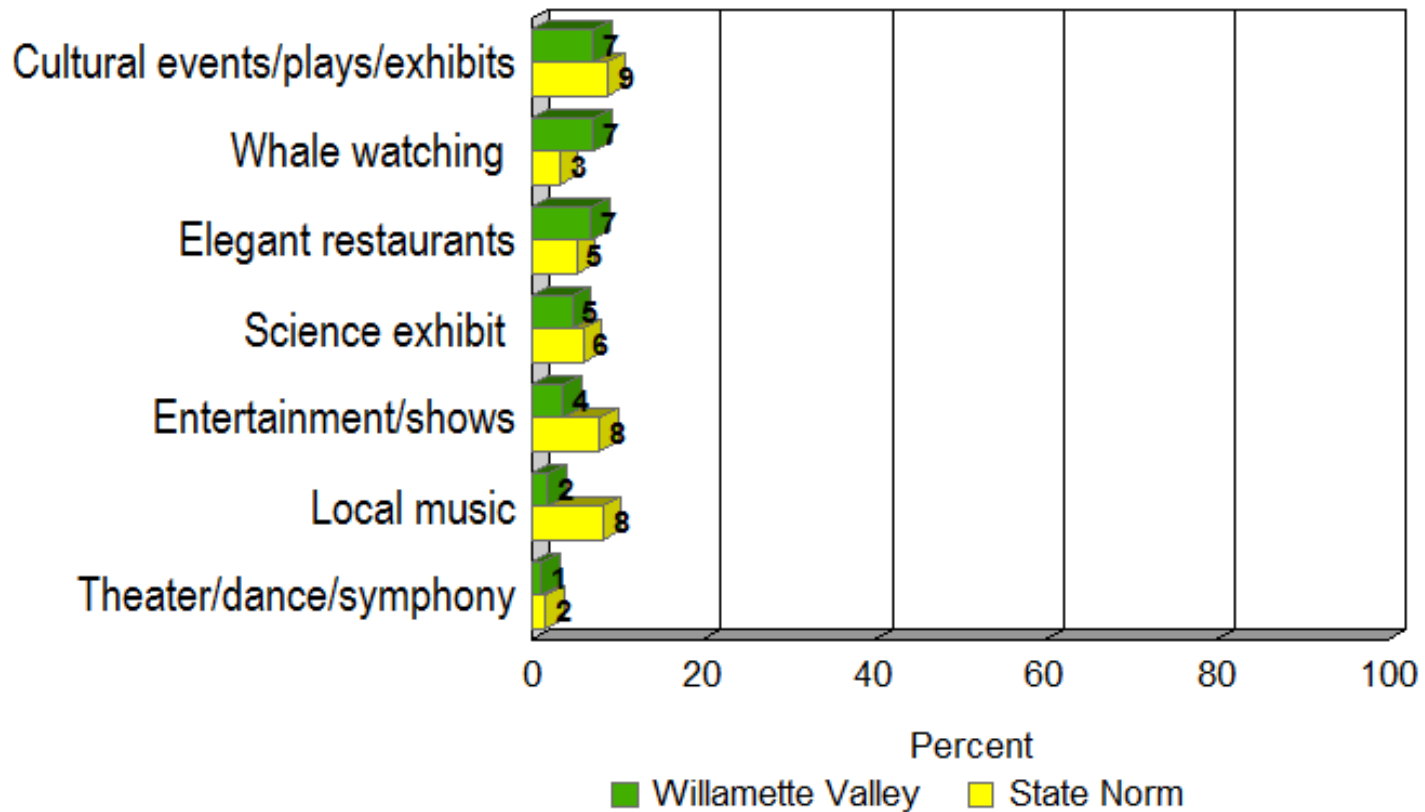
Base: Overnight Marketable Trips



# Entertainment — 2006 (Cont'd)



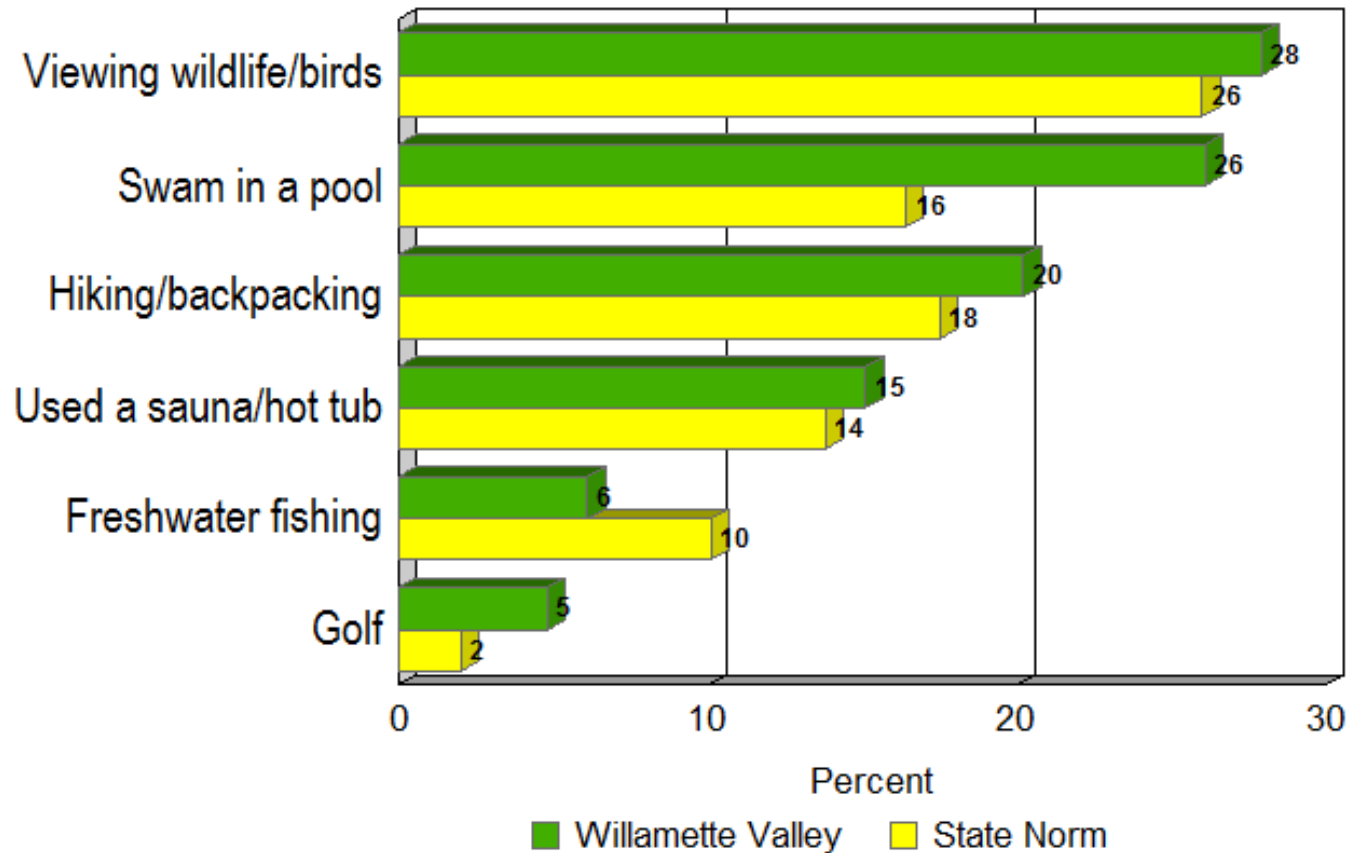
Base: Overnight Marketable Trips



# Sports & Recreation — 2006



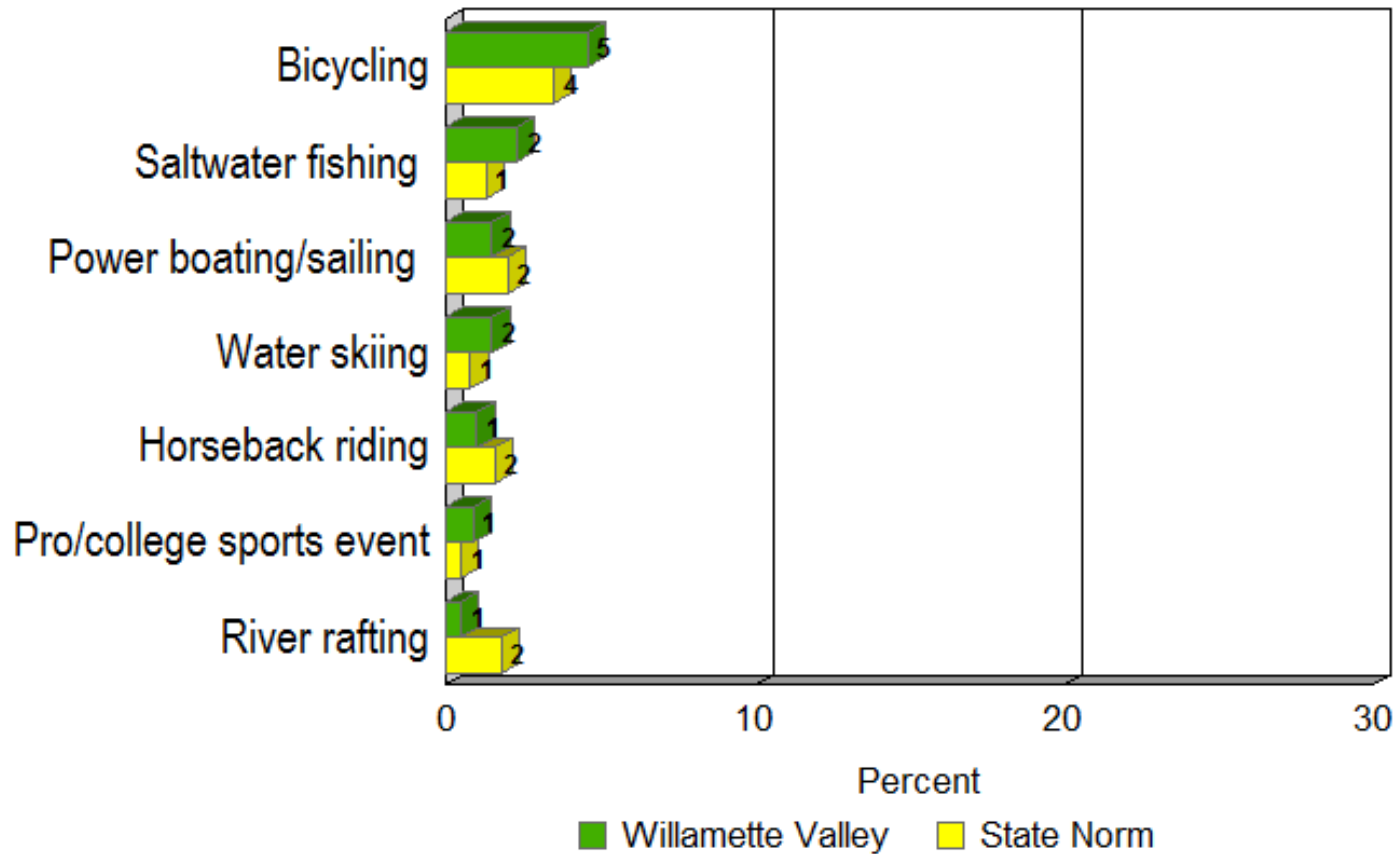
Base: Overnight Marketable Trips



# Sports & Recreation — 2006 (Cont'd)



Base: Overnight Marketable Trips

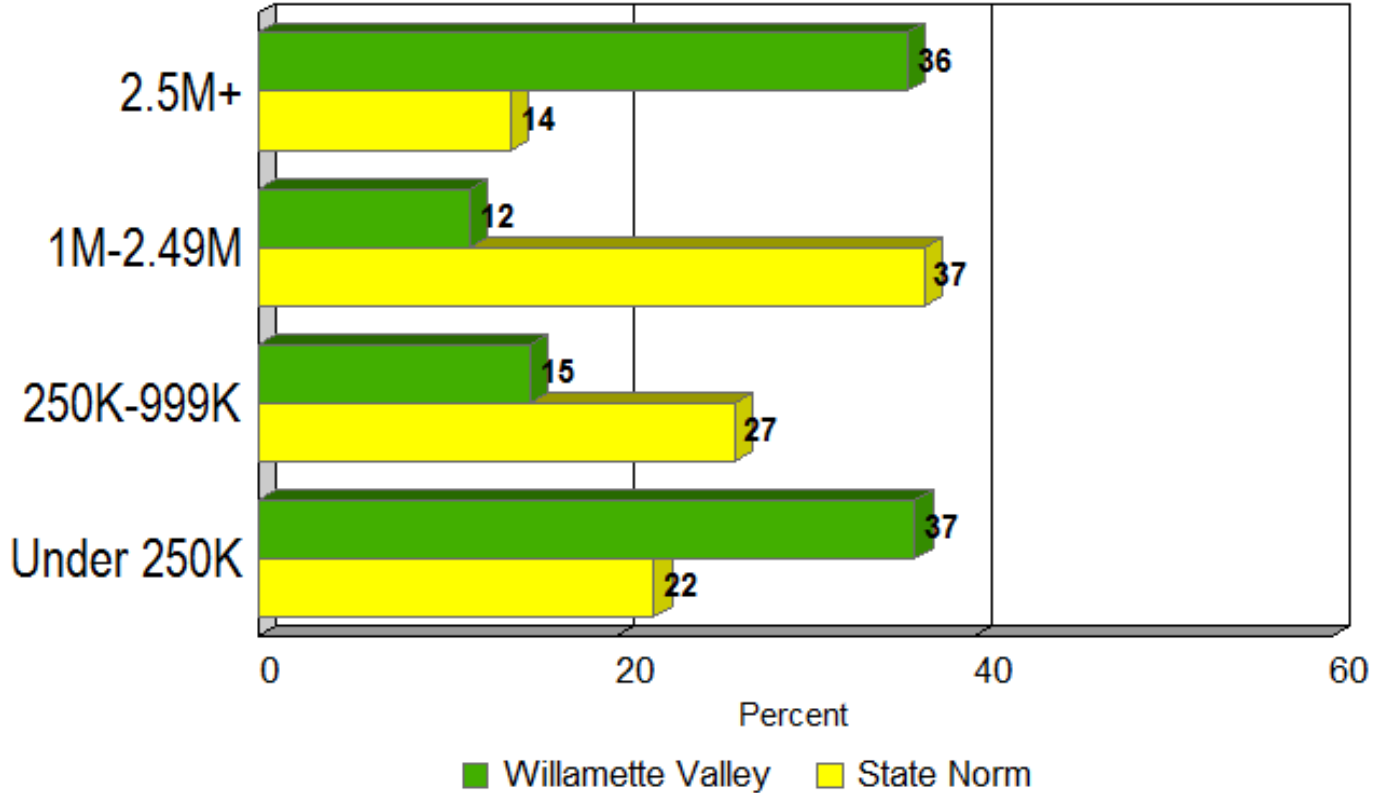


# Marketable Visitor Profile — 2006

# Community Size — 2006



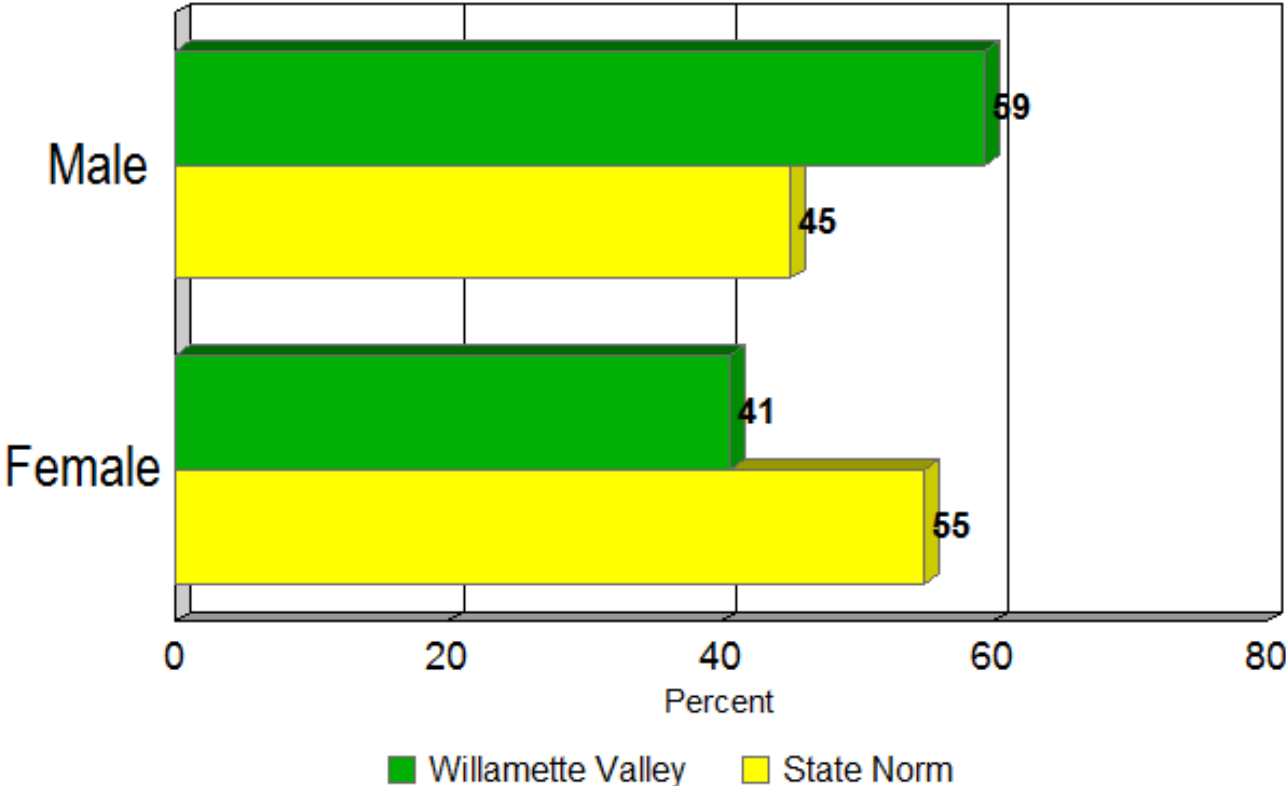
Base: Overnight Marketable Trips



# Gender — 2006



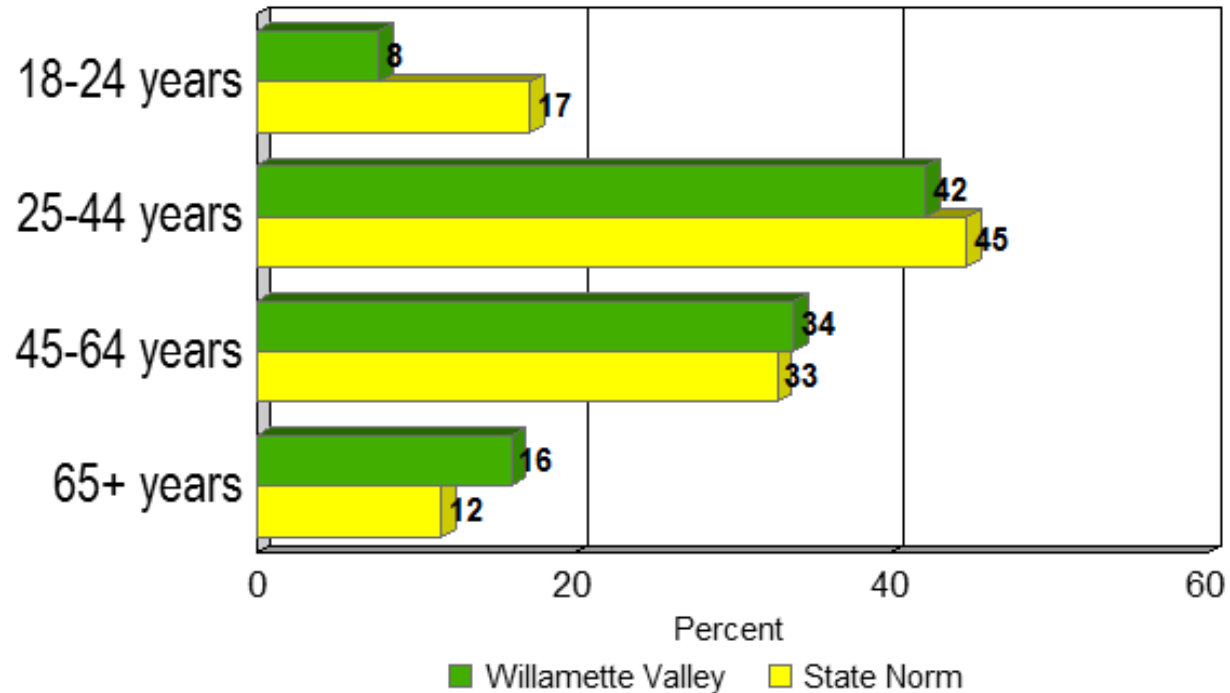
Base: Overnight Marketable Trips



# Age — 2006



Base: Overnight Marketable Trips

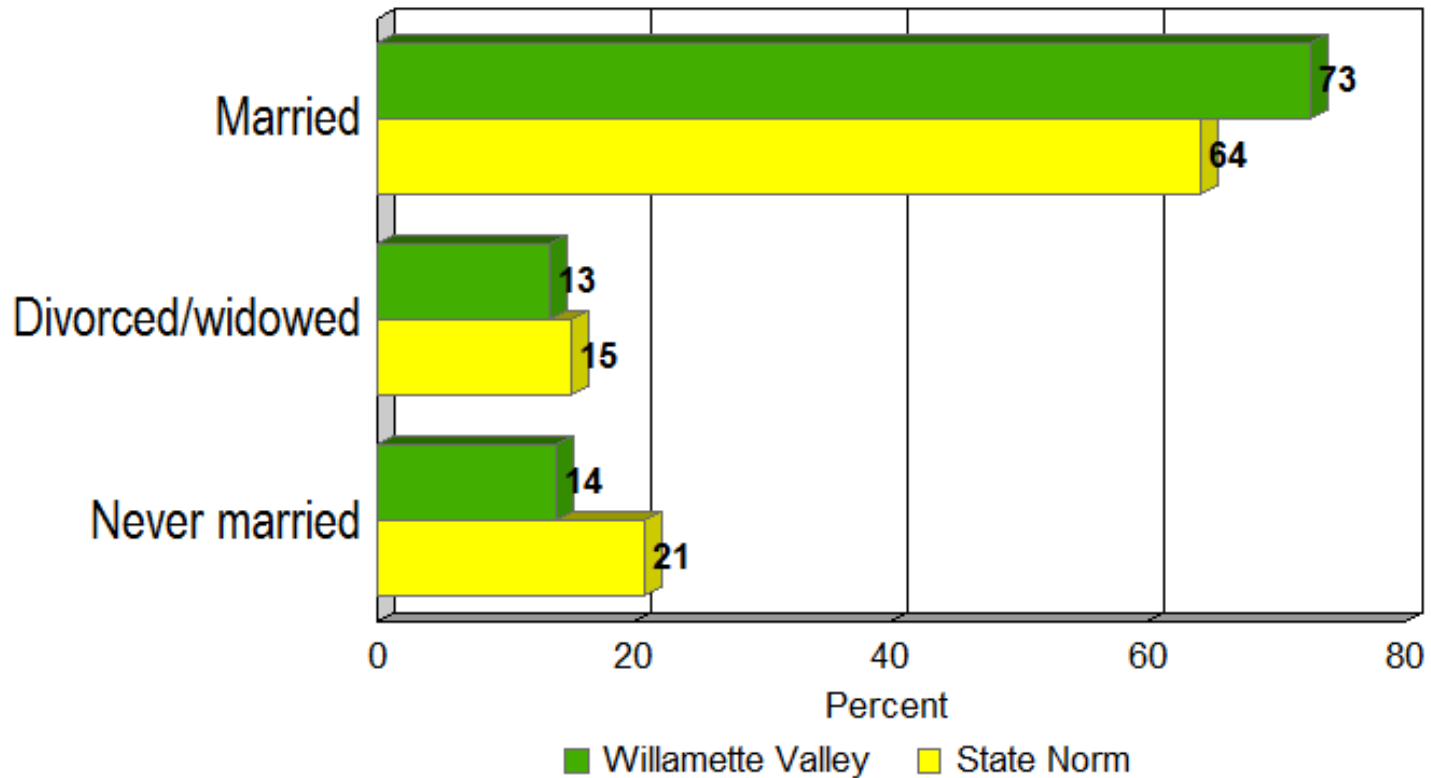


	<u>Willamette Valley Region</u>	<u>State Norm</u>
Average Age	44.7	41.9

# Marital Status — 2006



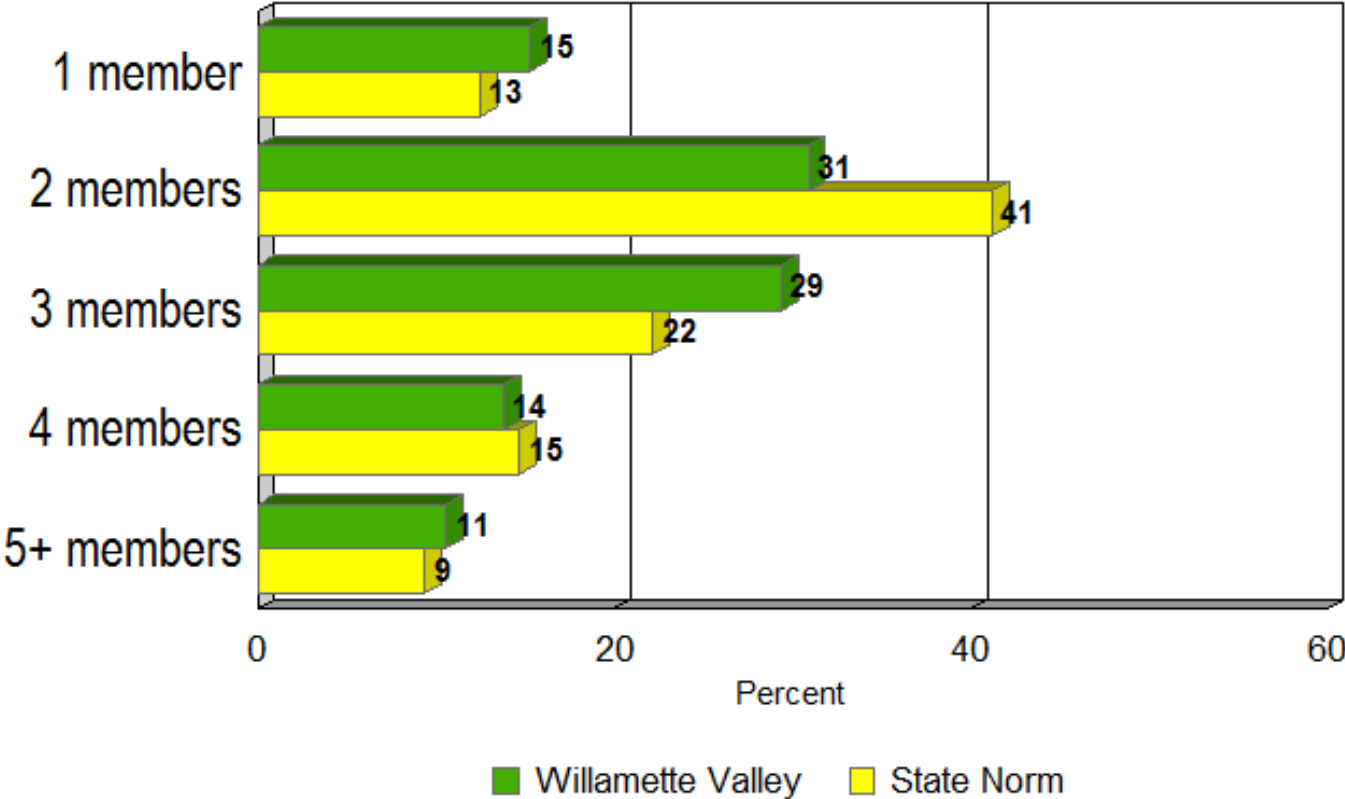
Base: Overnight Marketable Trips



# Household Size — 2006



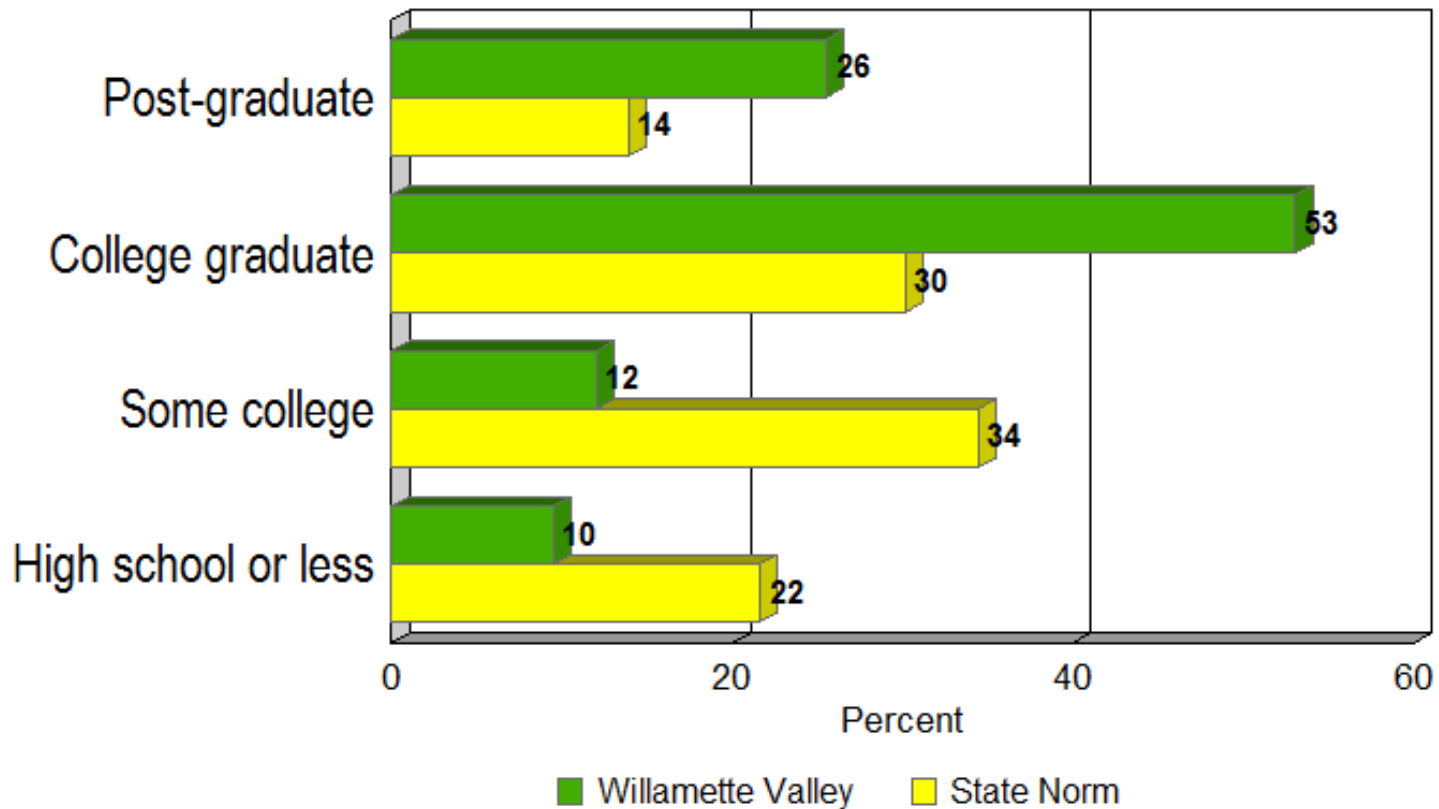
Base: Overnight Marketable Trips



# Education — 2006



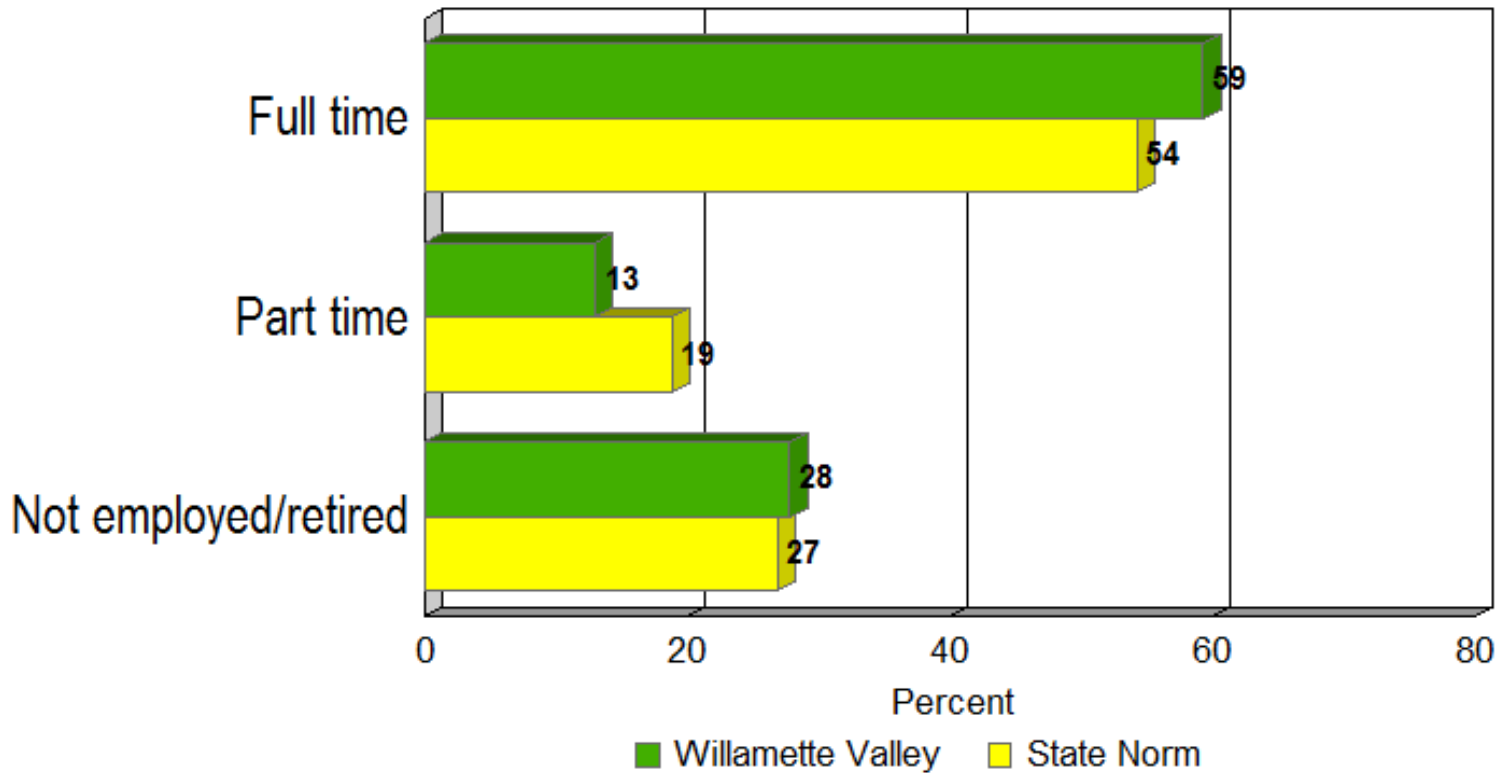
Base: Overnight Marketable Trips



# Employment — 2006



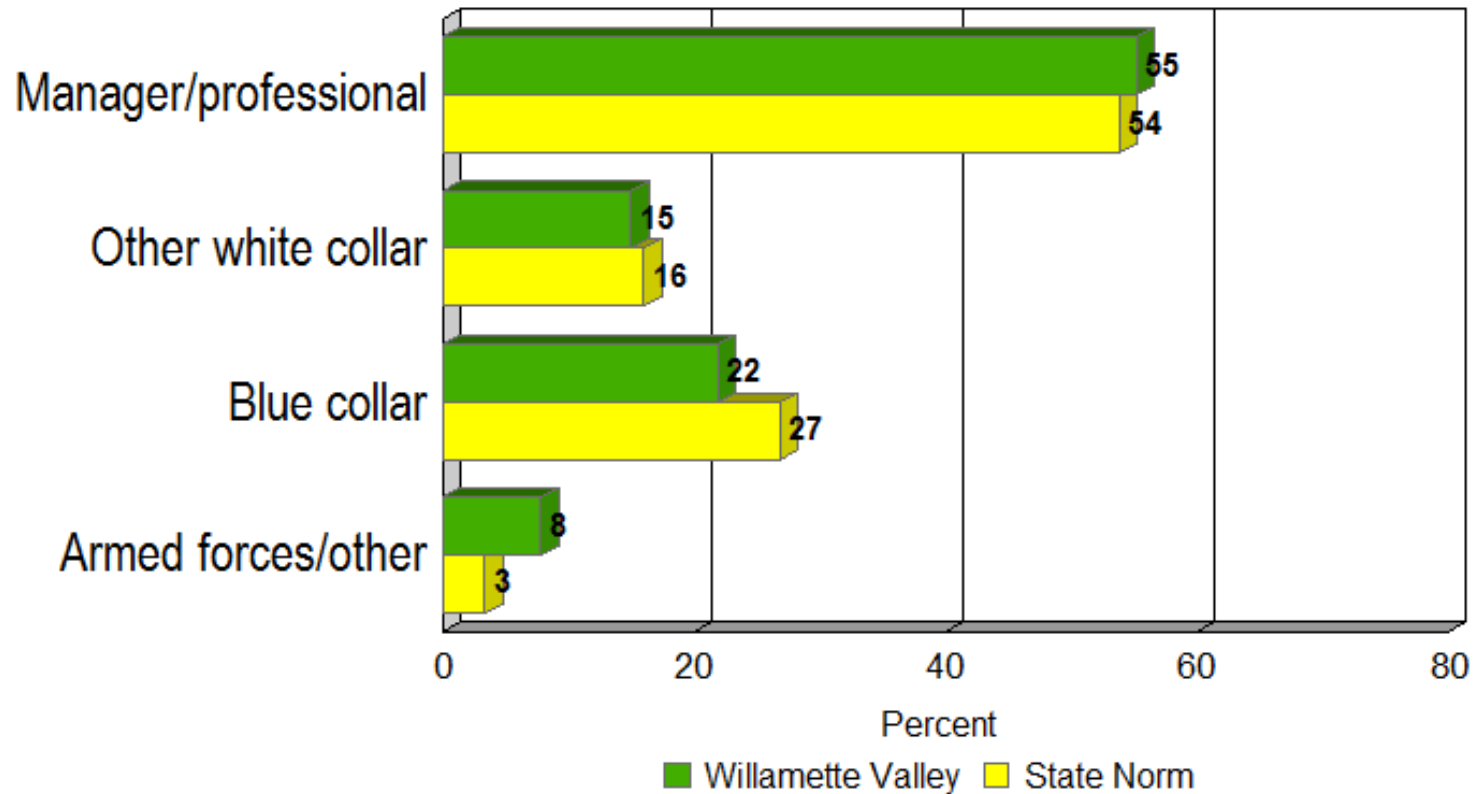
Base: Overnight Marketable Trips



# Occupation — 2006



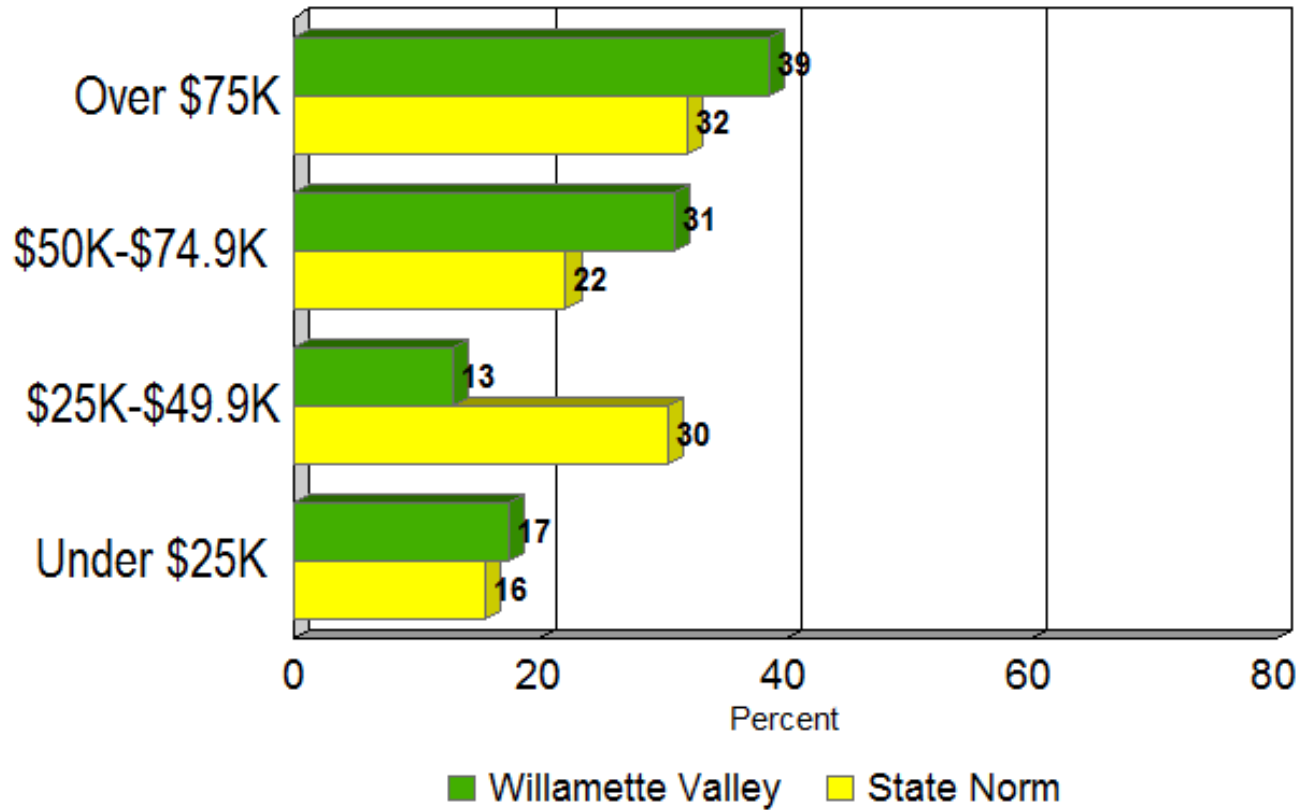
Base: Overnight Marketable Trips



# Income — 2006



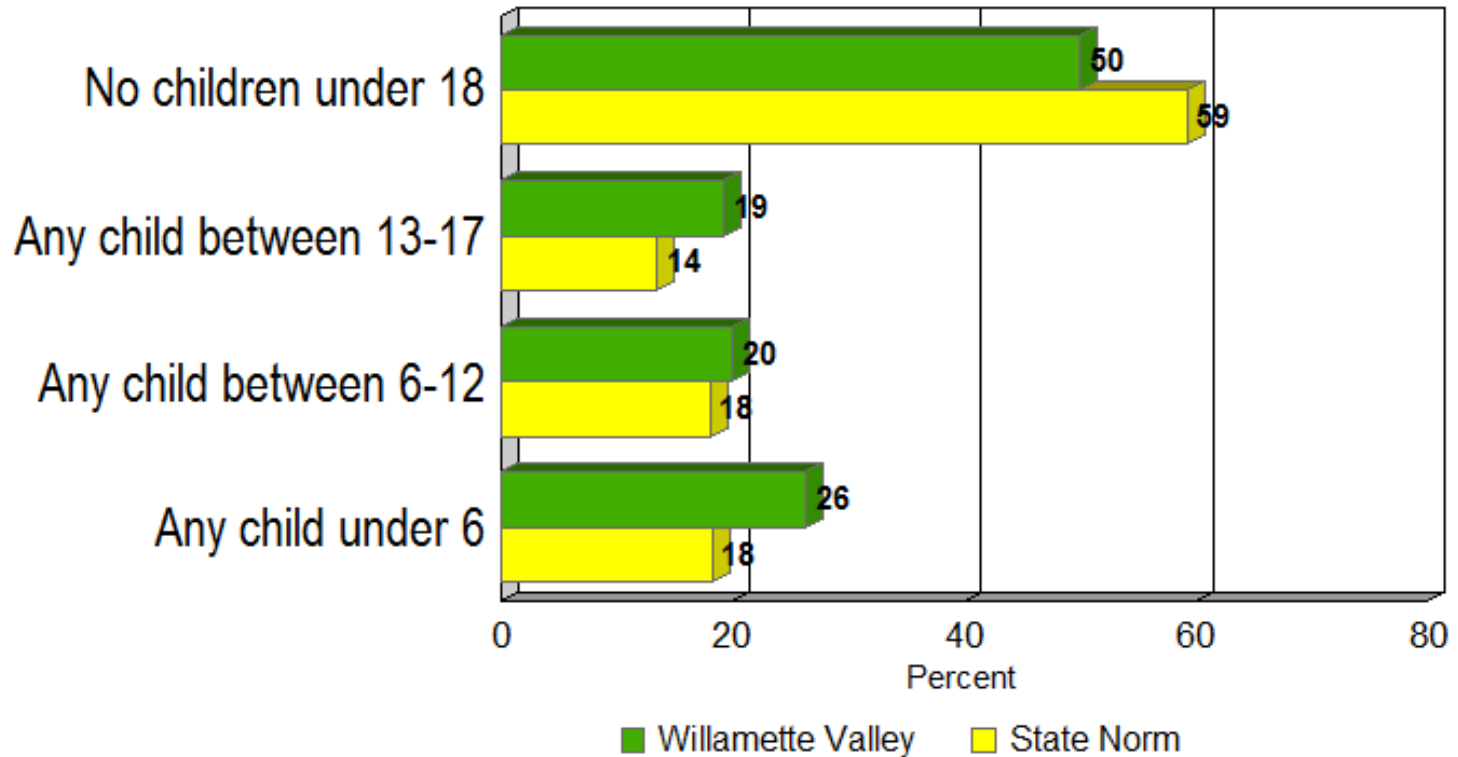
Base: Overnight Marketable Trips



# Children in Household — 2006



Base: Overnight Marketable Trips

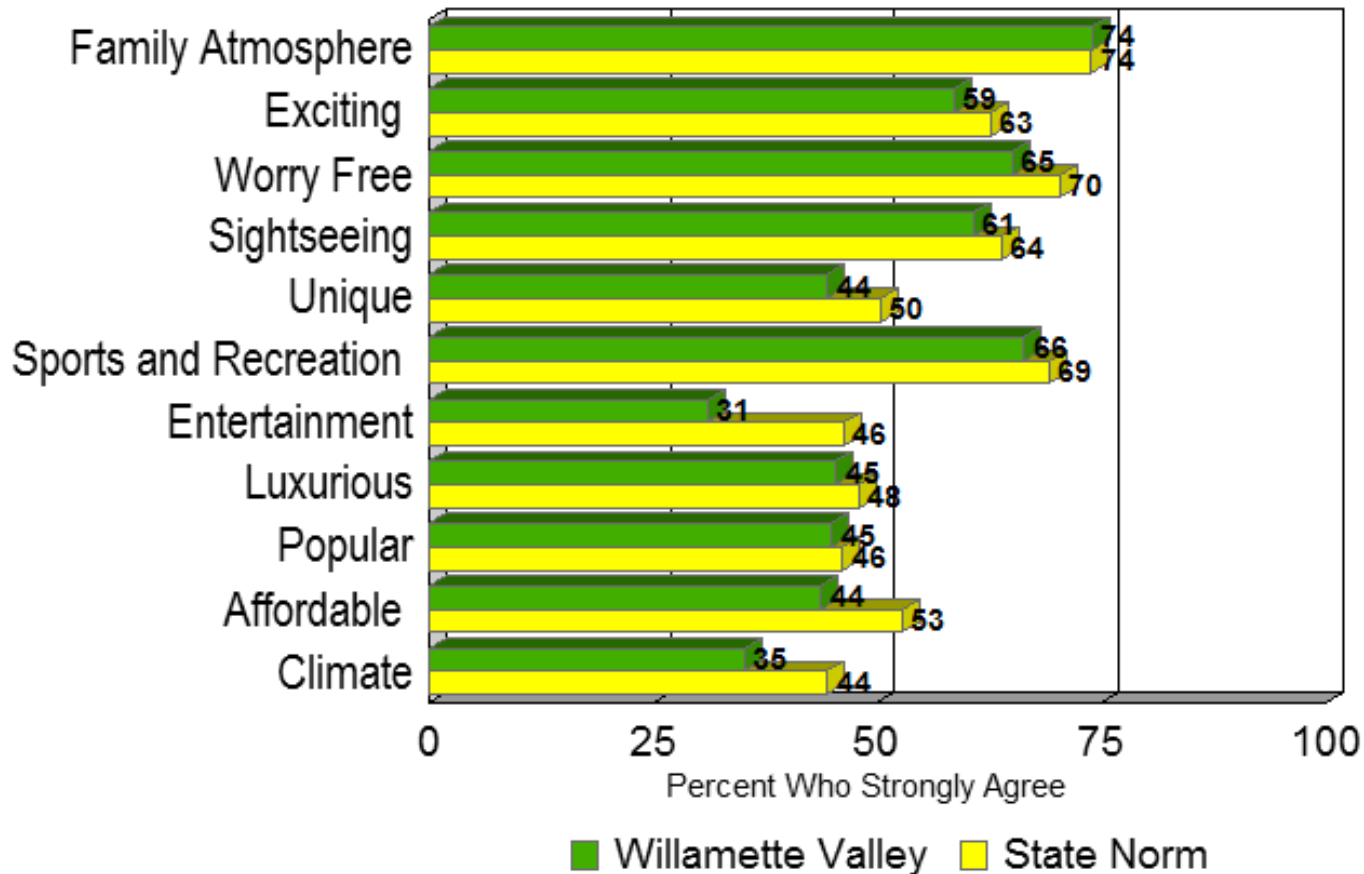


(Oregon) Visitor Priorities  
and Product Delivery  
Among Travelers to the Willamette  
Valley Region  
— 2006

# Product Delivery on Visitor Priorities — 2006



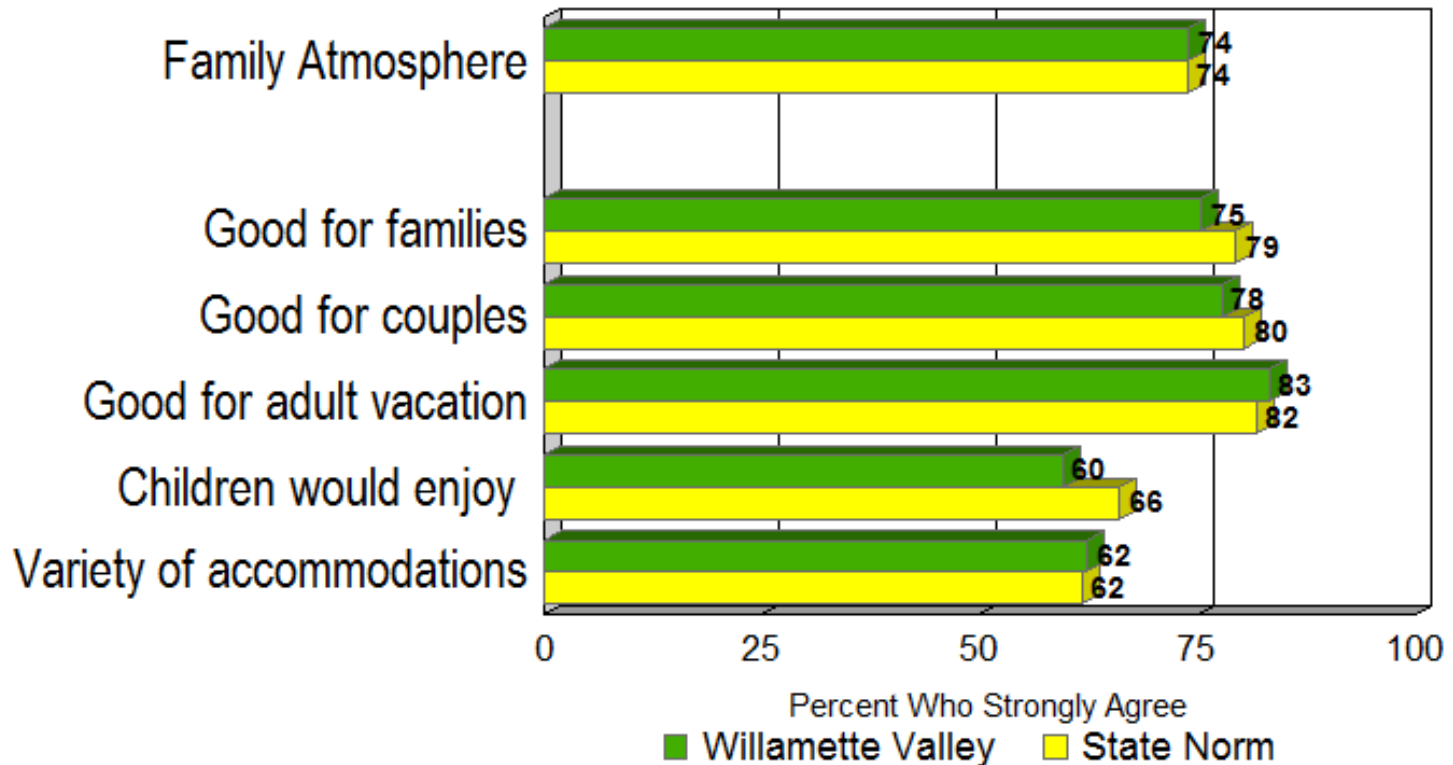
Base: Overnight Marketable Trips



# Product Delivery — Family Atmosphere



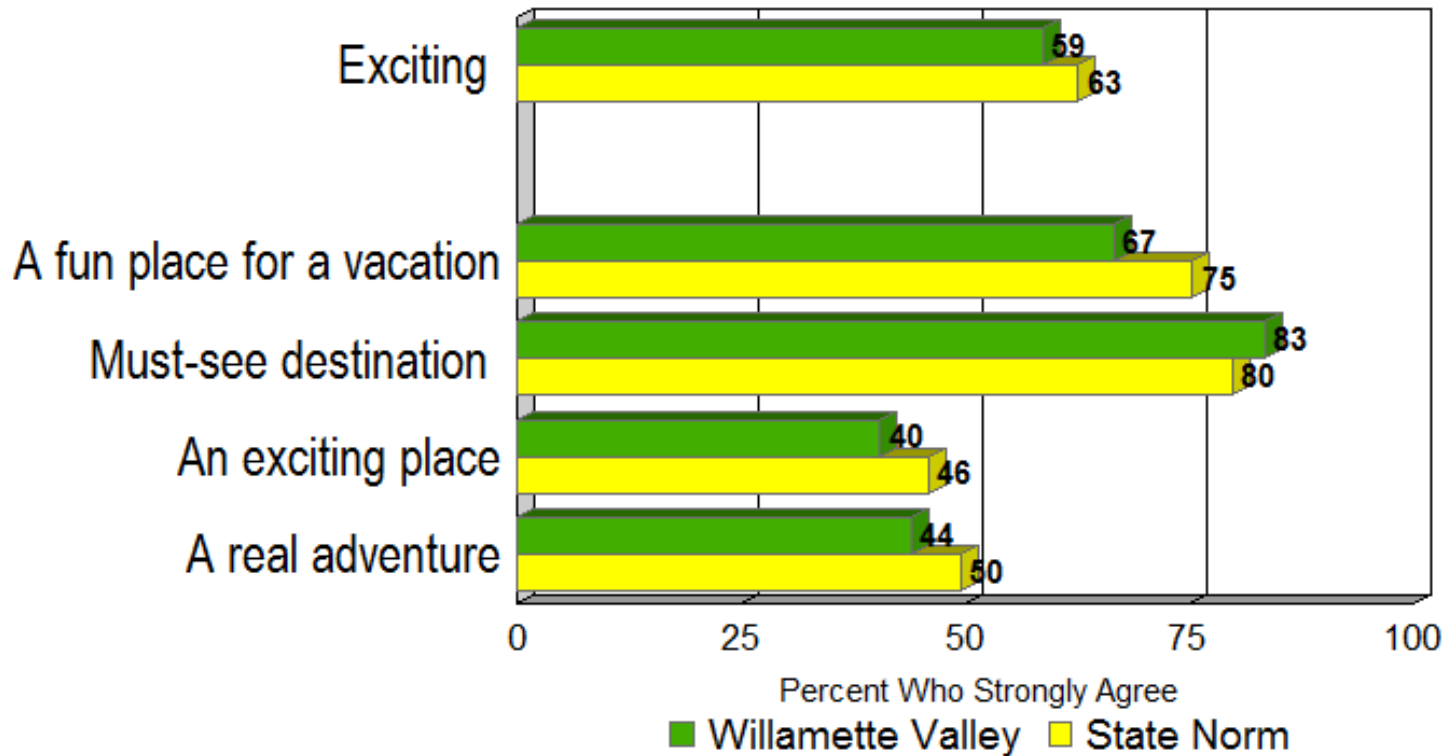
Base: Overnight Marketable Trips



# Product Delivery — Exciting



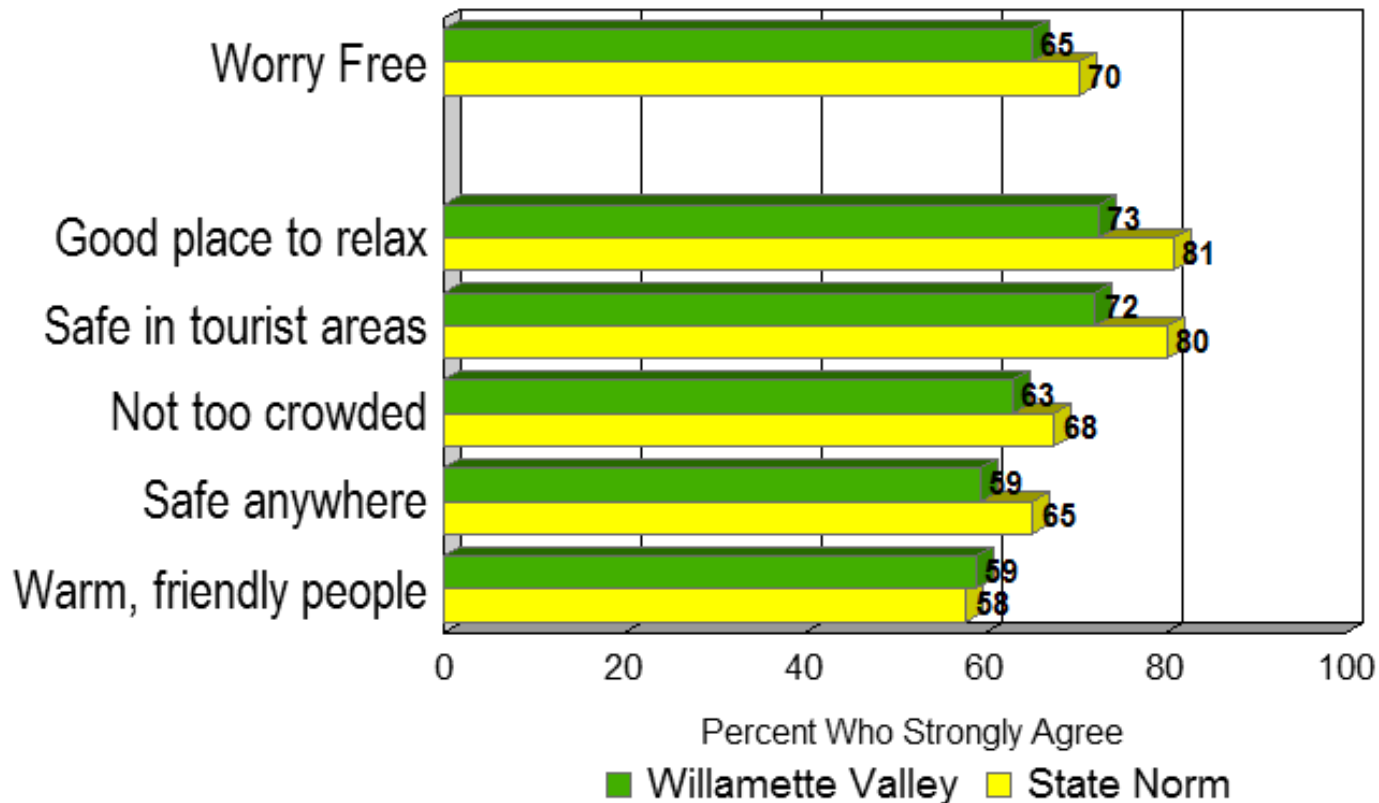
Base: Overnight Marketable Trips



# Product Delivery — Worry Free



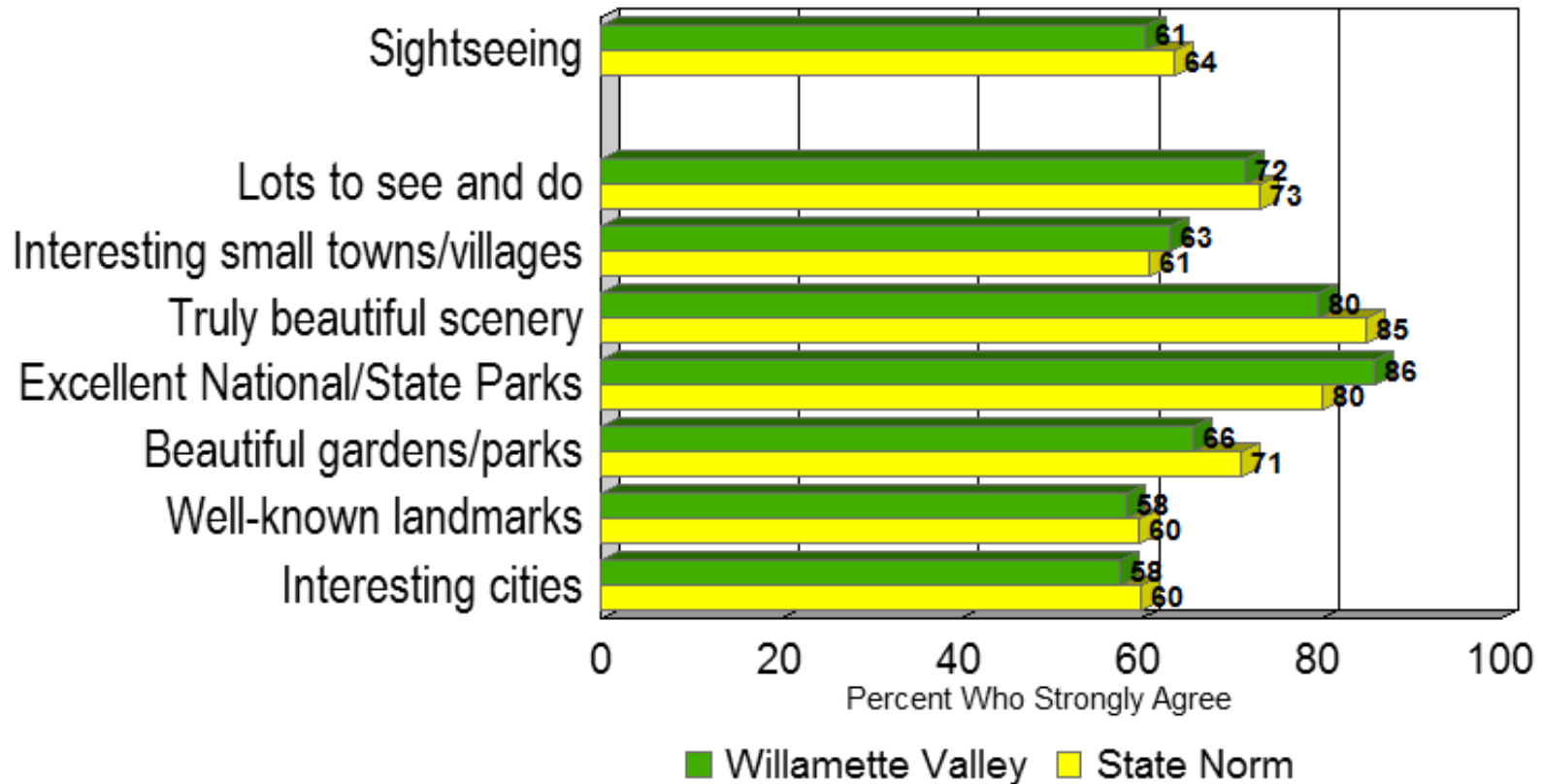
Base: Overnight Marketable Trips



# Product Delivery — Sightseeing



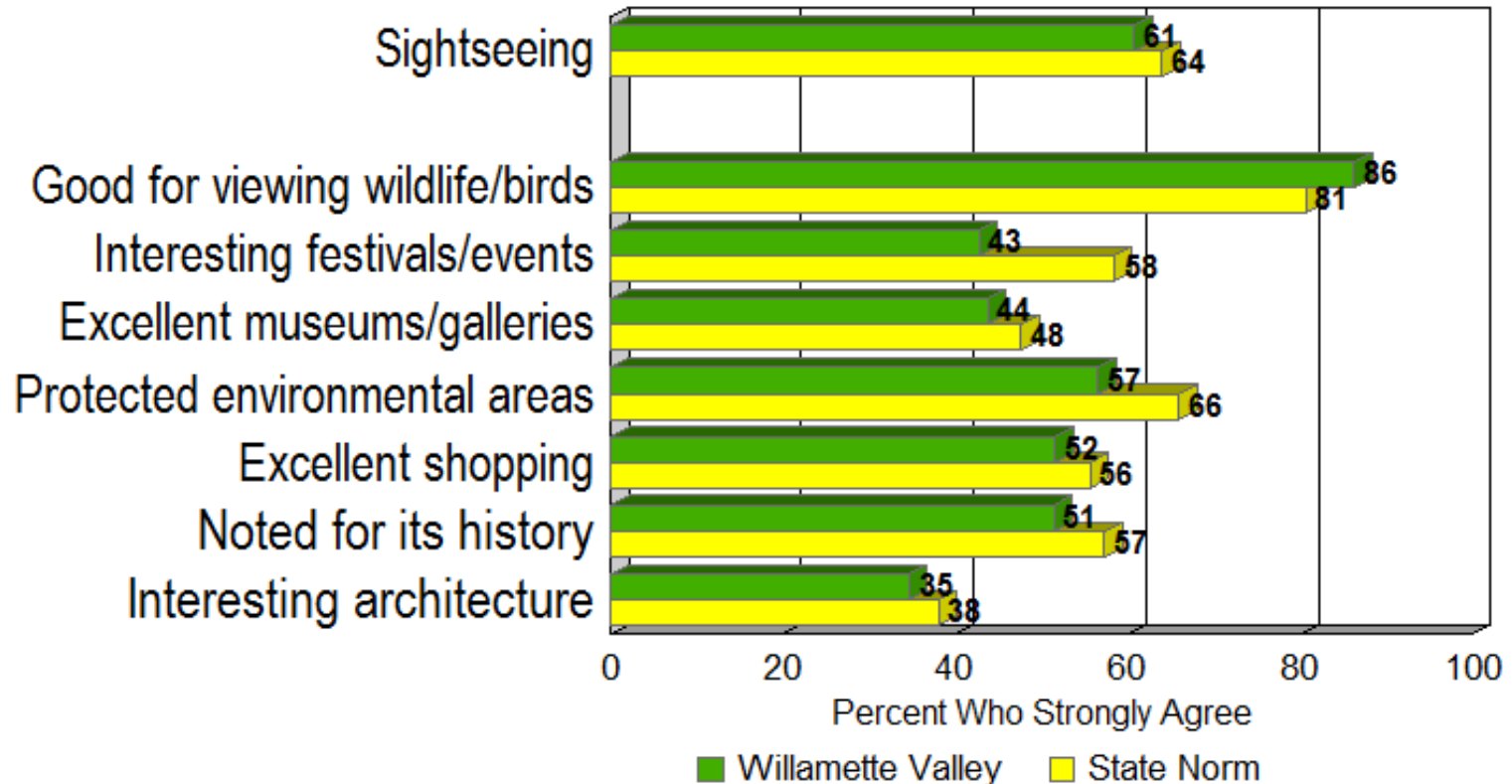
Base: Overnight Marketable Trips



# Product Delivery — Sightseeing (Cont'd)



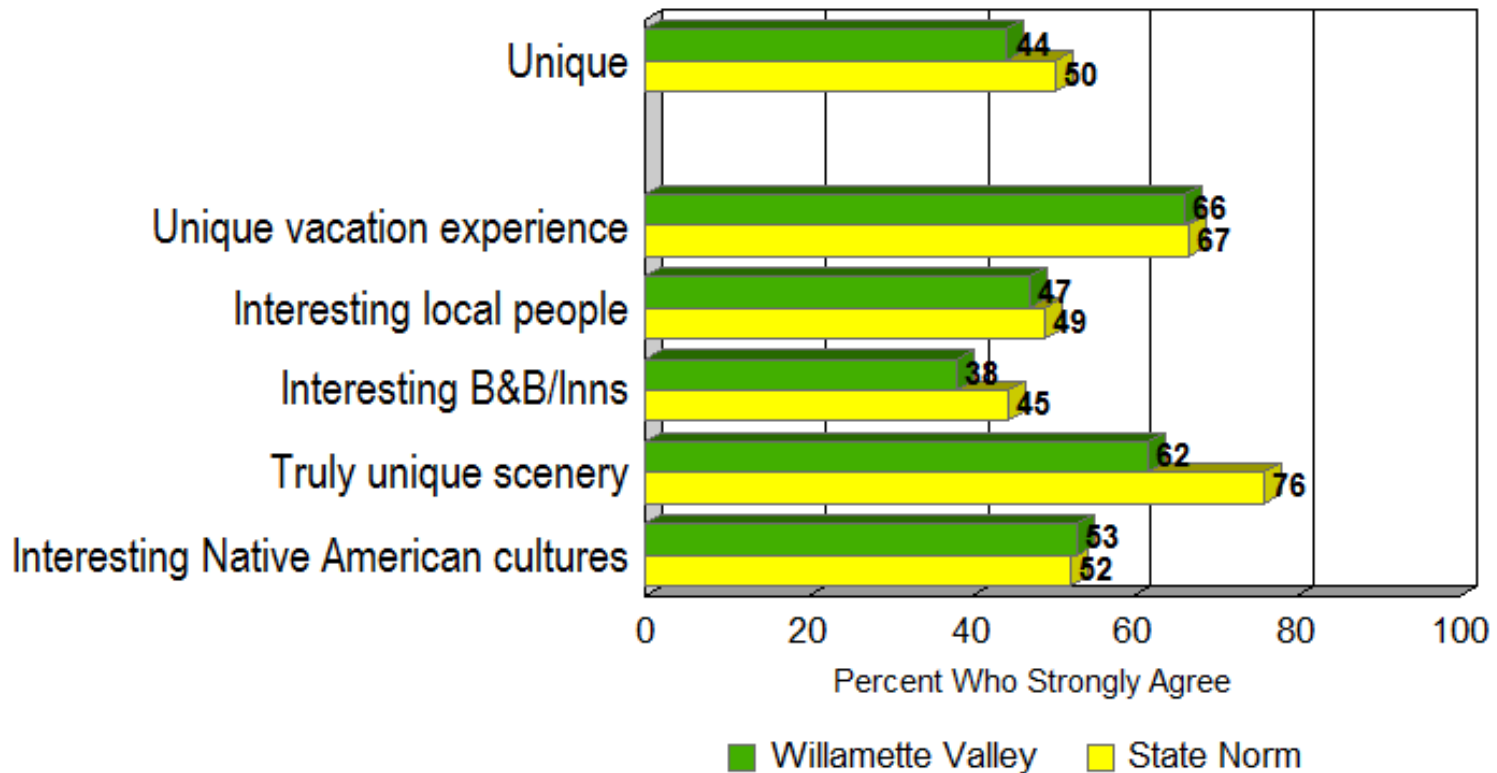
Base: Overnight Marketable Trips



# Product Delivery — Unique



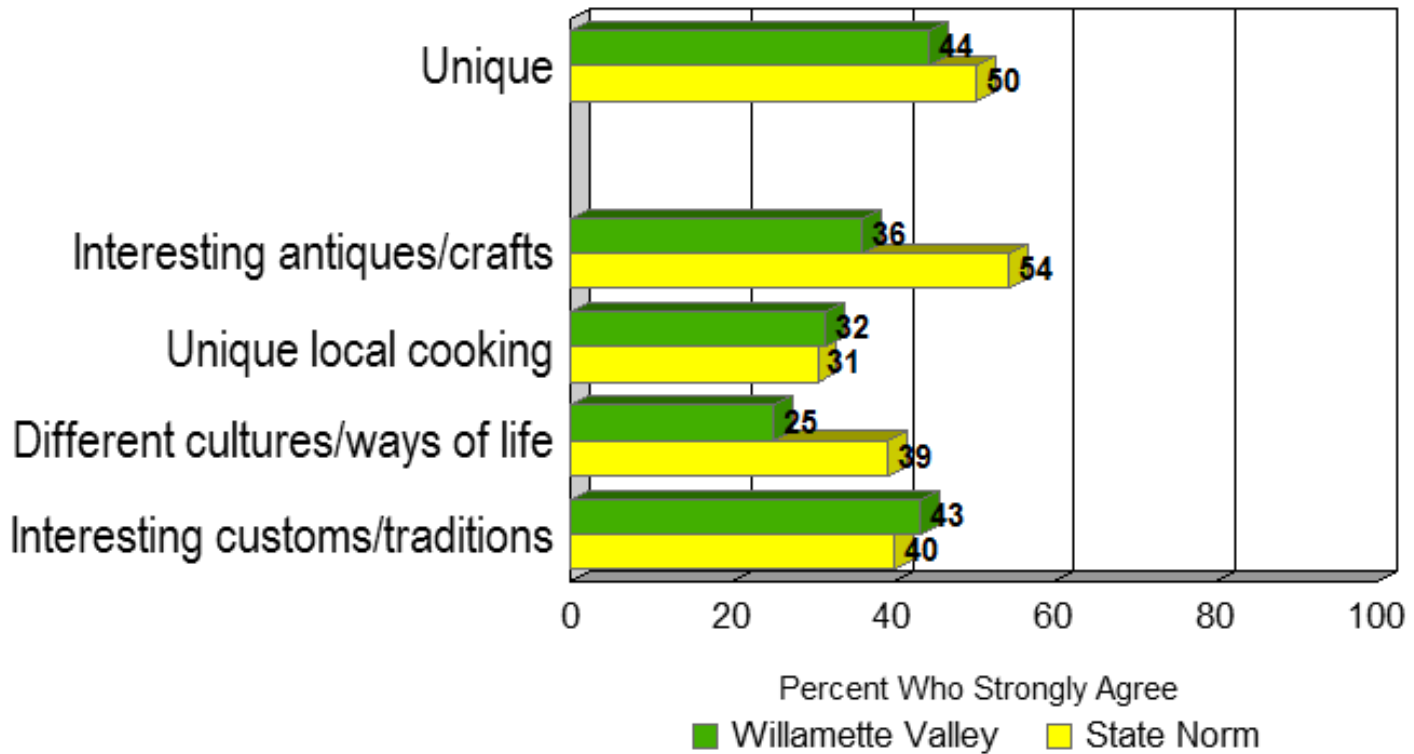
Base: Overnight Marketable Trips



# Product Delivery — Unique (Cont'd)



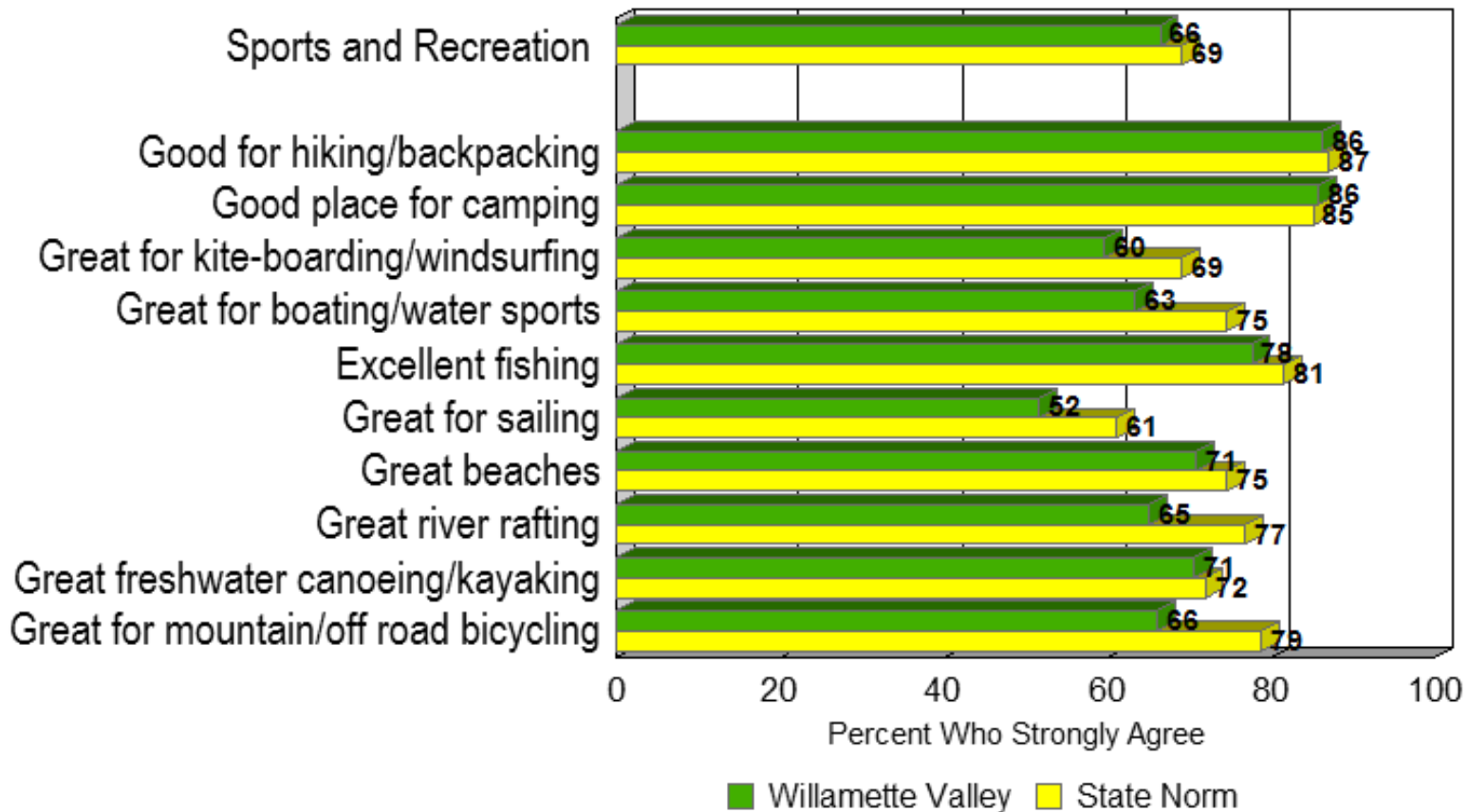
Base: Overnight Marketable Trips



# Product Delivery — Sports and Recreation



Base: Overnight Marketable Trips

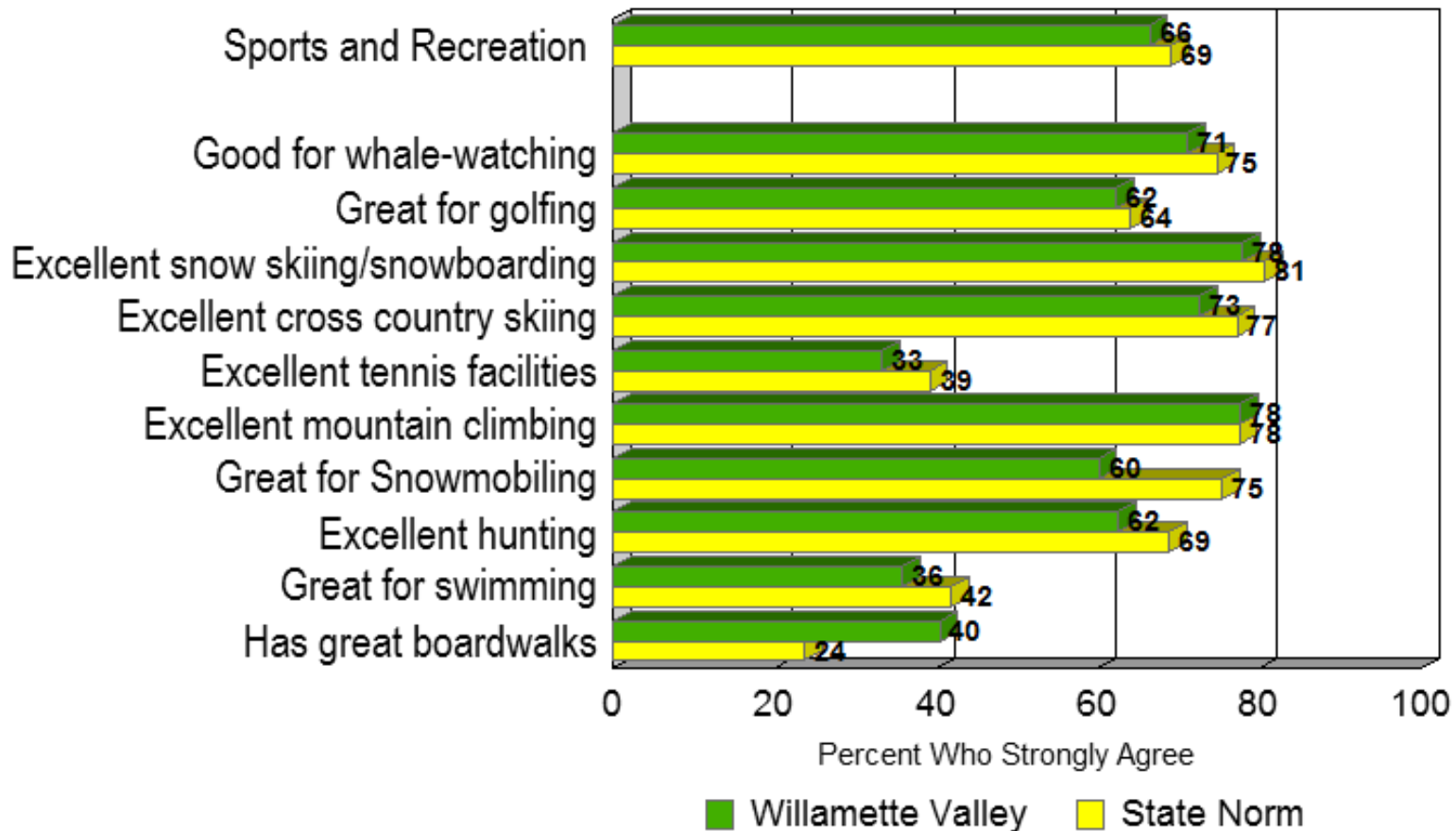


# Product Delivery

## — Sports and Recreation (Cont'd)



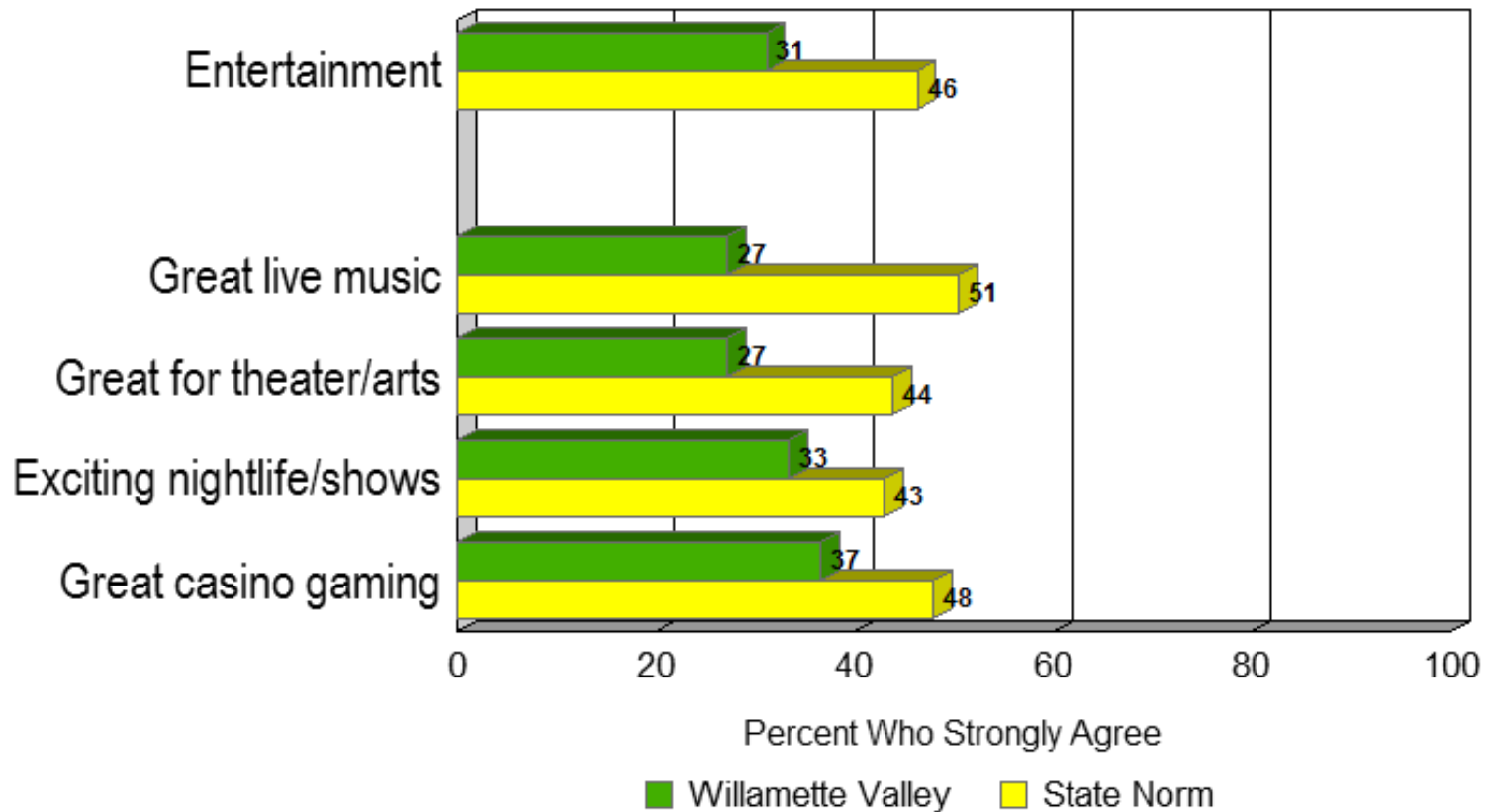
Base: Overnight Marketable Trips



# Product Delivery — Entertainment



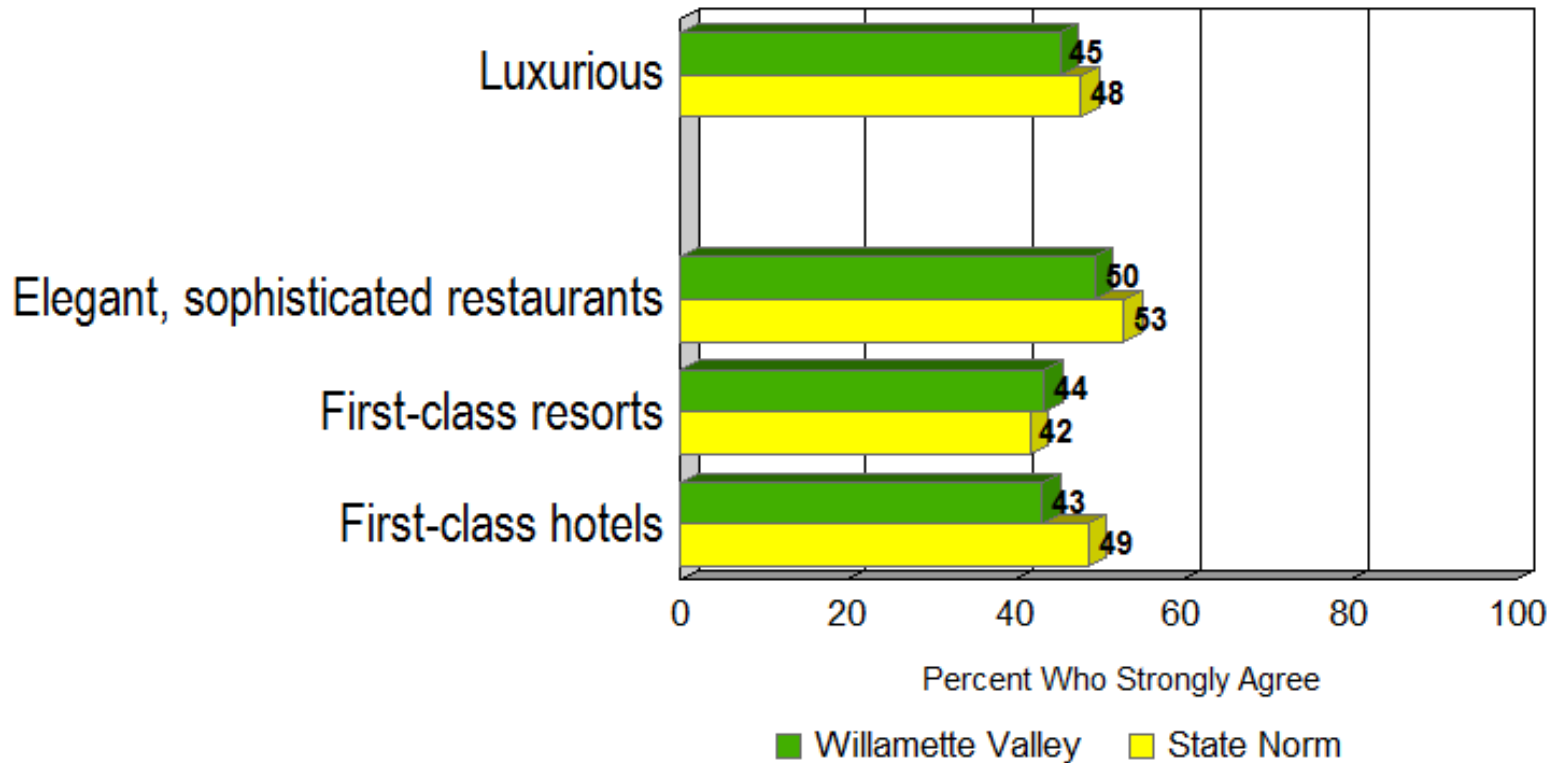
Base: Overnight Marketable Trips



# Product Delivery — Luxurious



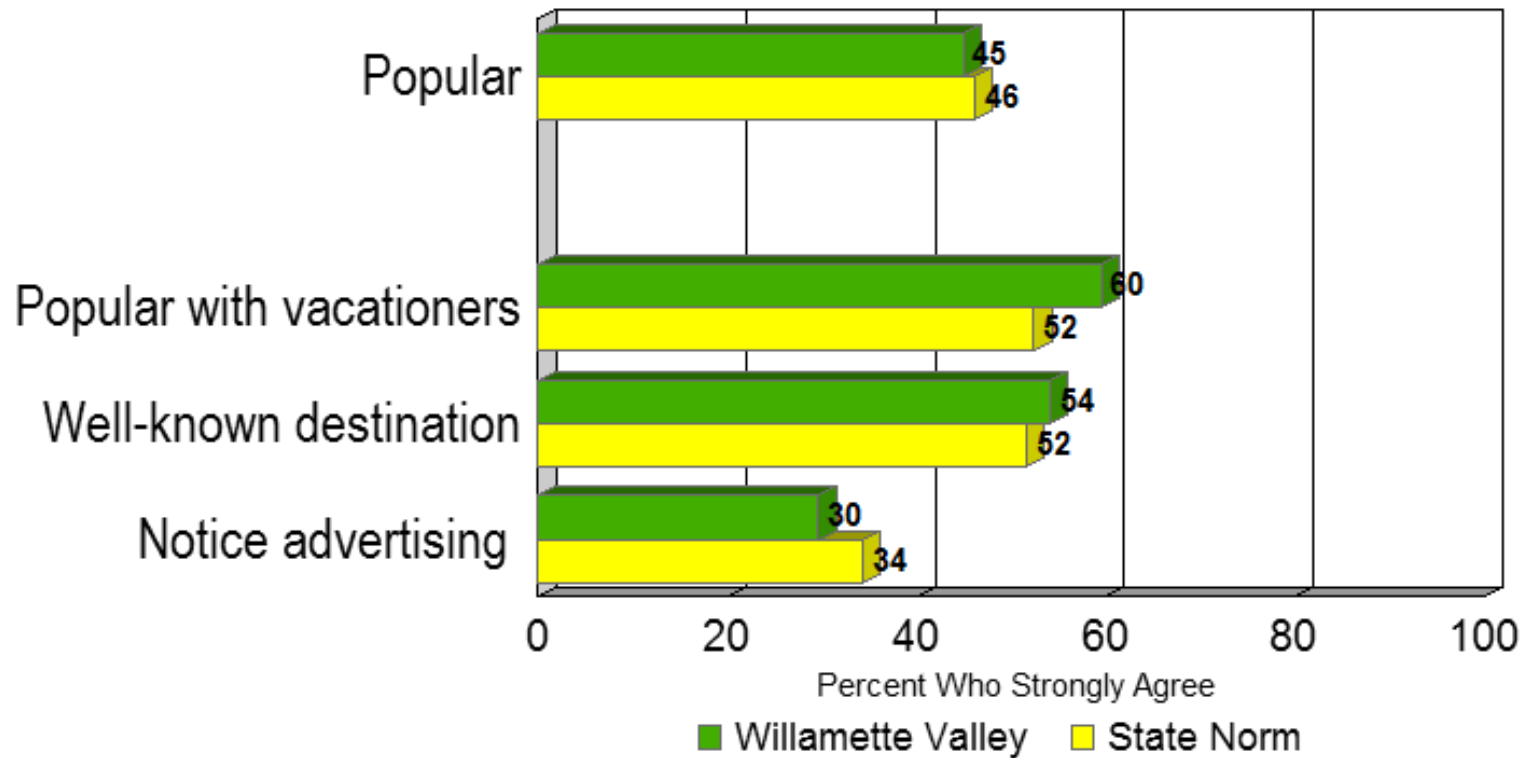
Base: Overnight Marketable Trips



# Product Delivery — Popular



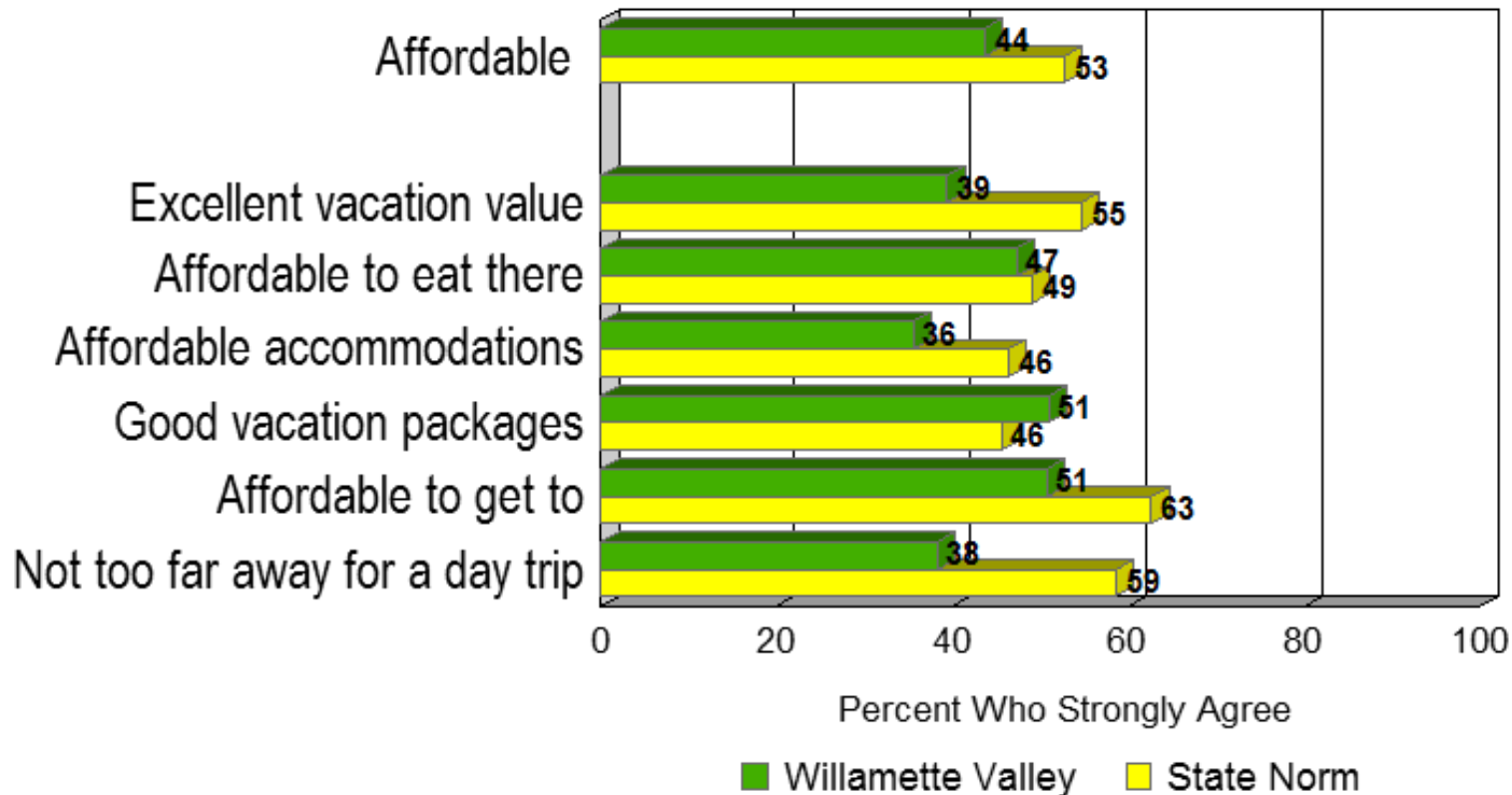
Base: Overnight Marketable Trips



# Product Delivery — Affordable



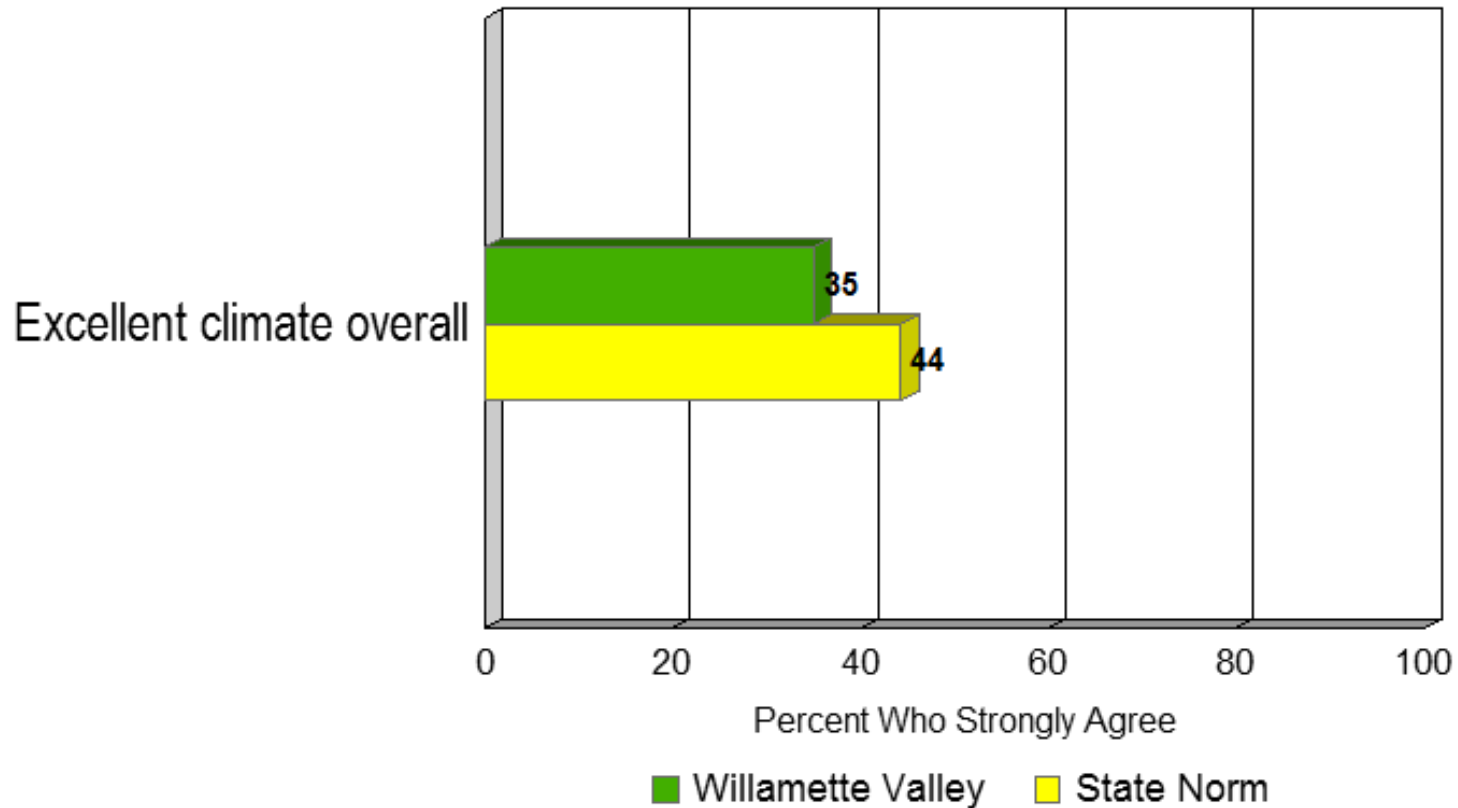
Base: Overnight Marketable Trips



# Product Delivery — Climate



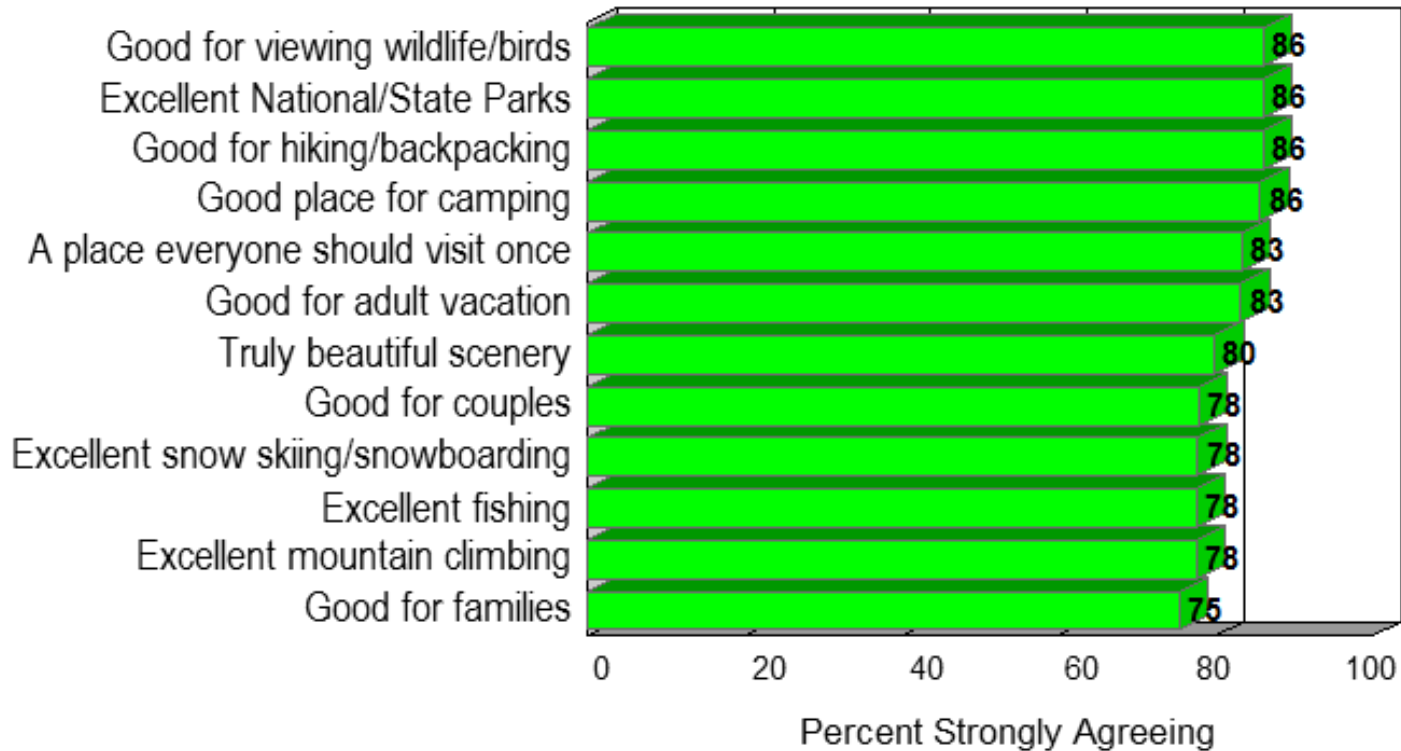
Base: Overnight Marketable Trips



# Product Strengths — 2006



Base: Overnight Marketable Trips



# Product Weaknesses — 2006



Base: Overnight Marketable Trips

