



## ***The Coast Region***

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

**July 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 Coast Region in particular*
  - *strategic intelligence on the Coast 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 817 respondents **spent time** in the **Coast Region Oregon** and 600 indicated that it was their **main destination***
  - *768 respondents traveled to the region on a **pleasure trip**, 479 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.*

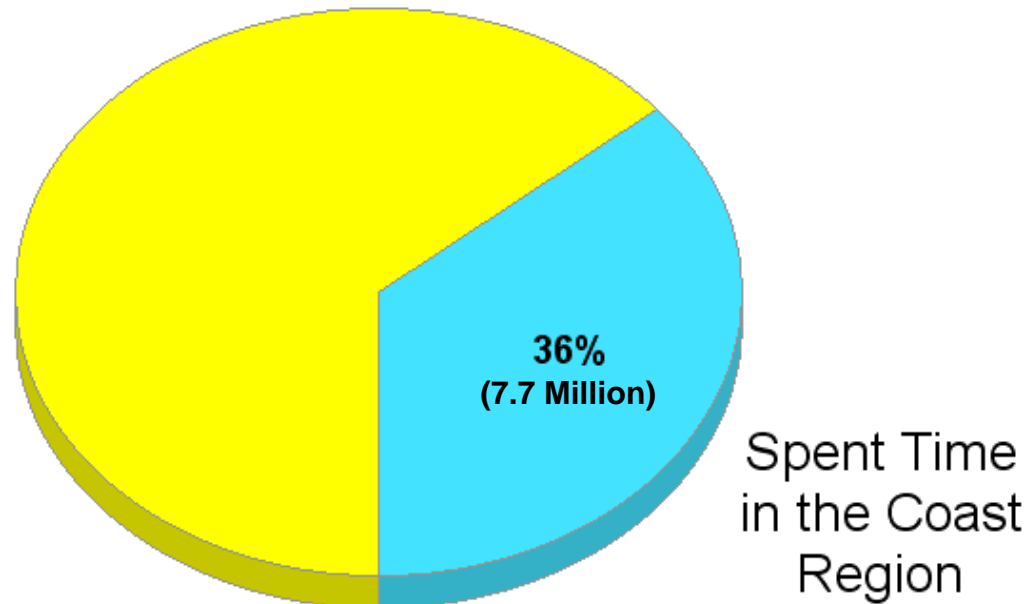
# **MAIN FINDINGS**

The Coast Region  
Travel Market Size and Structure  
— **2006**

# Visitors to Oregon and the Coast Region in 2006



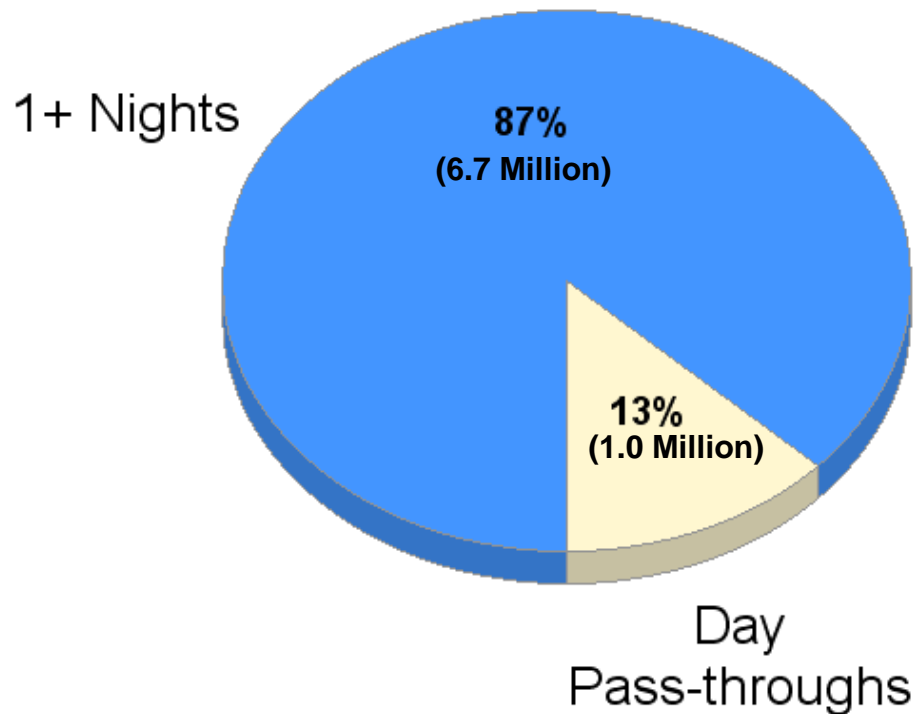
**Total Visitors to Oregon = 21.2 Million**



# Length of Stay in the Coast Region



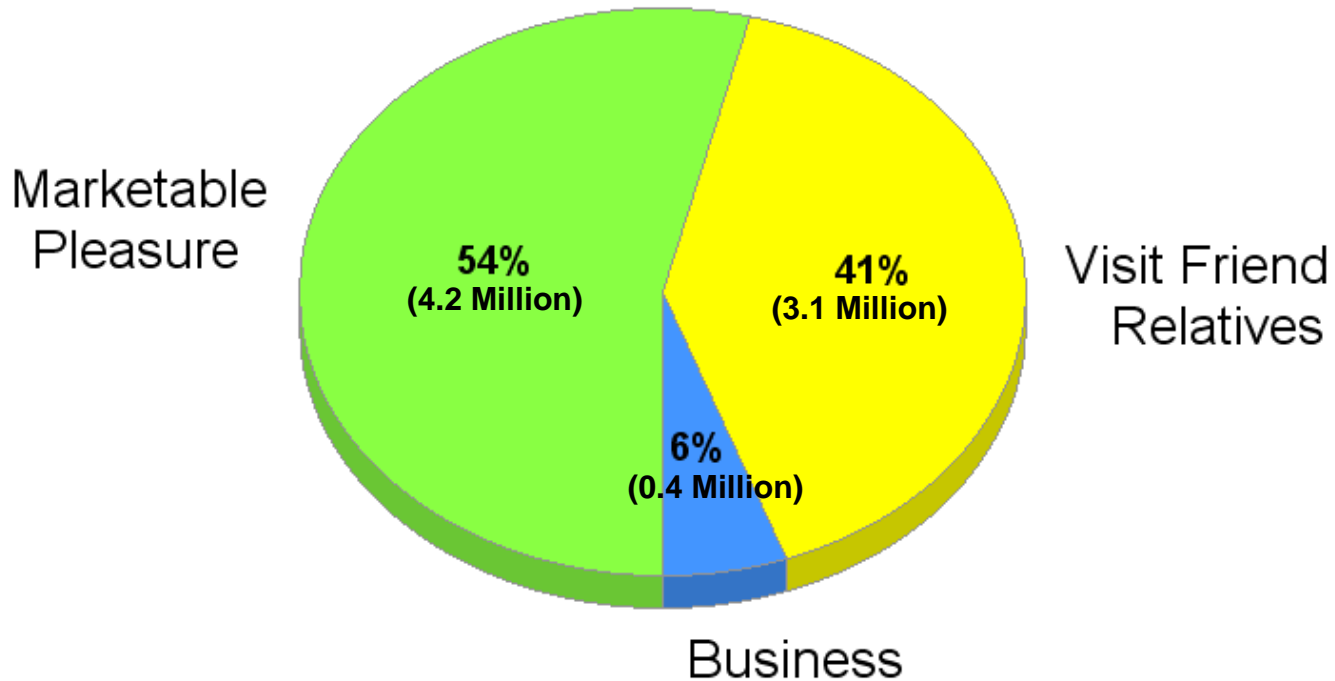
**Spent Time in the Coast Region = 7.7 Million**



# Purpose of Trips to the Coast Region

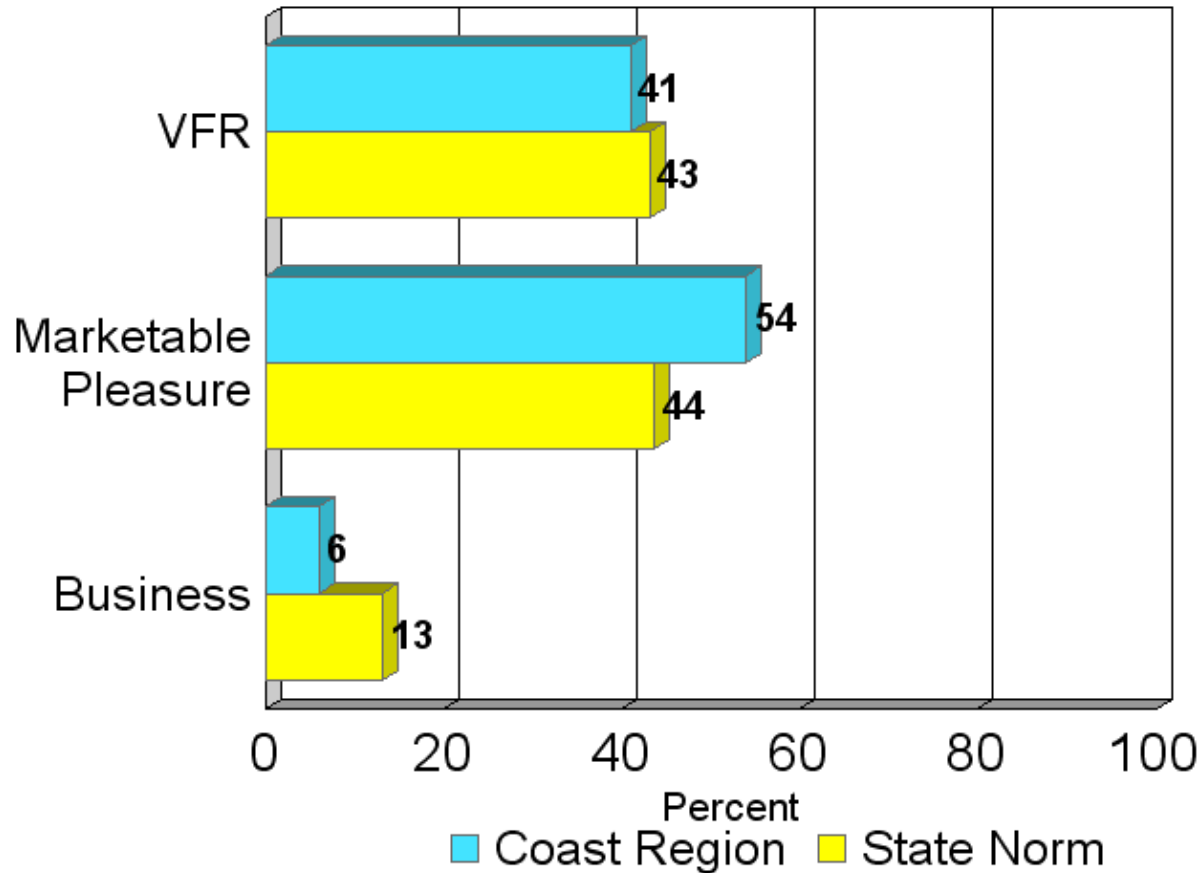


**Spent Time in the Coast Region = 7.7 Million**

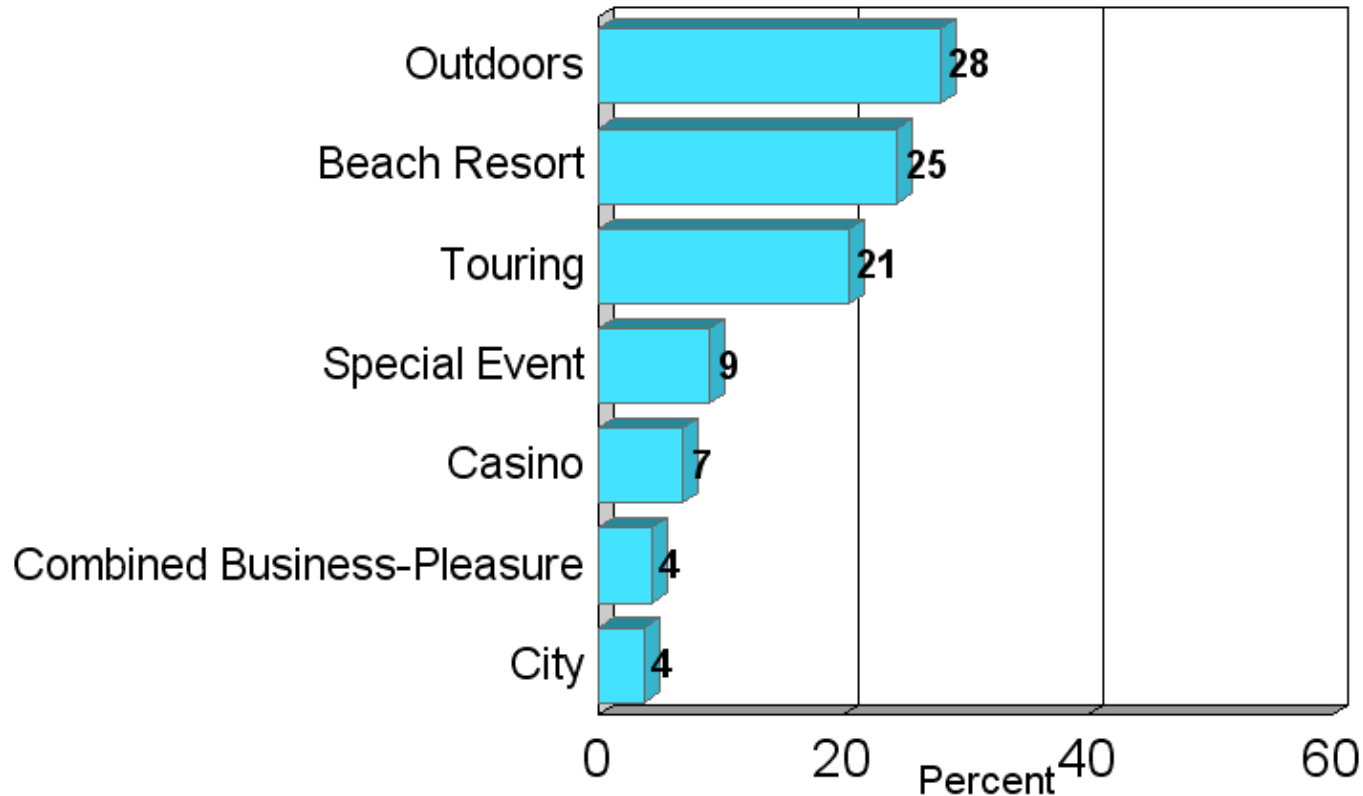


# Trips By Segment

## — Coast Region vs. Oregon State



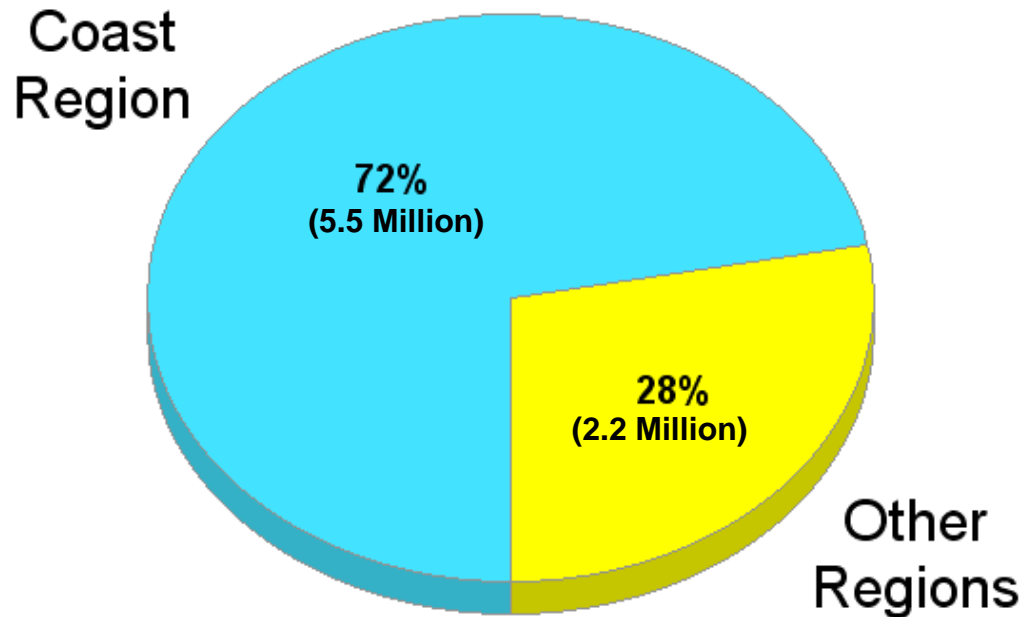
# The Coast Region's Marketable Trip Segments In 2006



# Main Destination of Travelers to the Coast Region



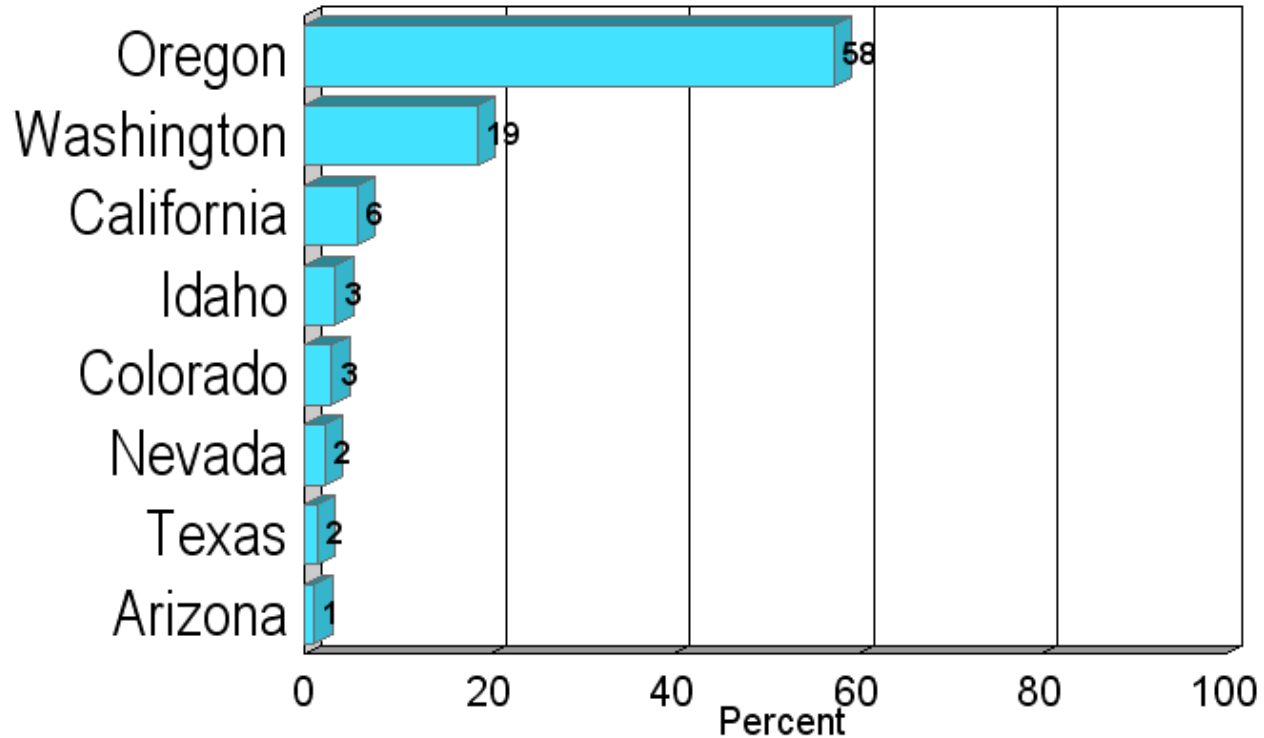
**Spent Time in the Coast Region = 7.7 Million**



# The Coast Region's State Sources of Business in 2006



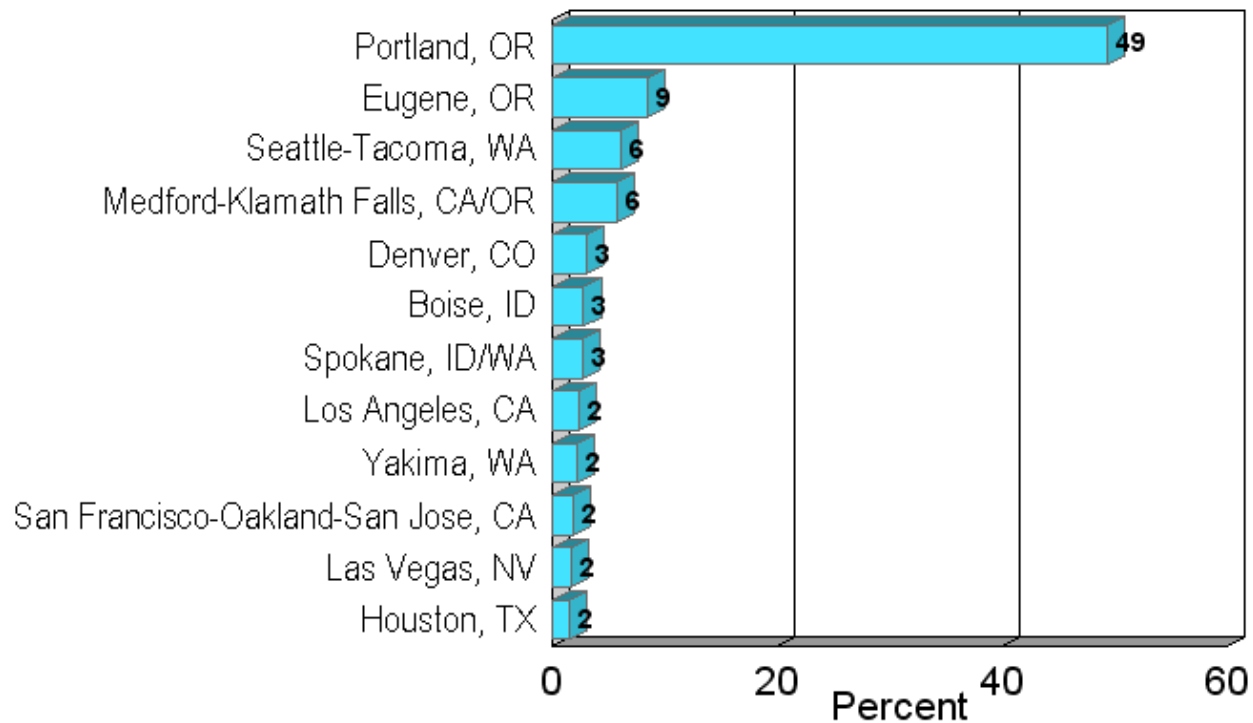
Base: Overnight Marketable Trips (visitors who spent time in the Coast Region)



# The Coast Region's Urban Sources of Business in 2006



Base: Overnight Marketable Trips (those who spent time in the Coast Region)



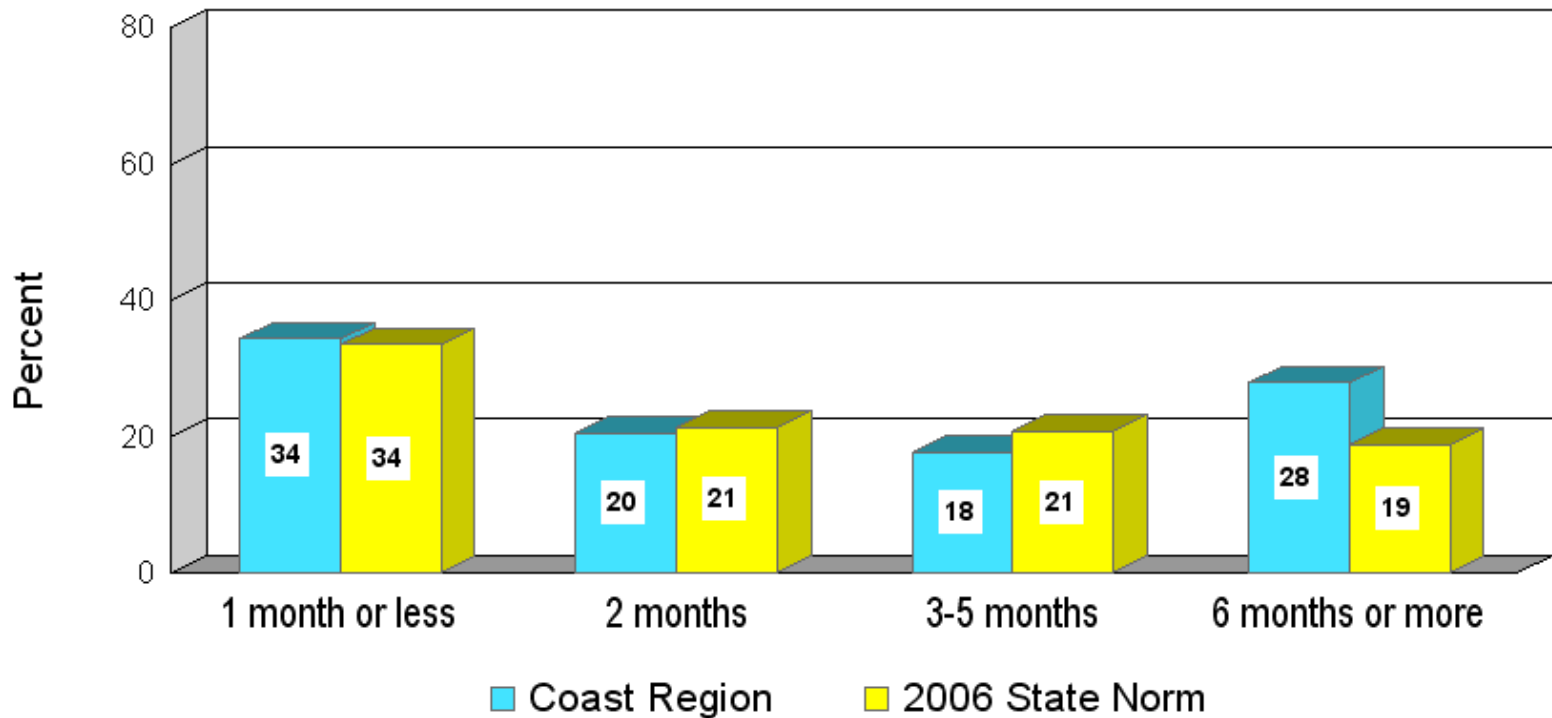
The Coast Region  
Marketable Trip Characteristics,  
Visitor Profile and Imagery  
— **2004/2006**

# Marketable Trip Characteristics — 2004/2006

# Planning Cycle — 2004/2006



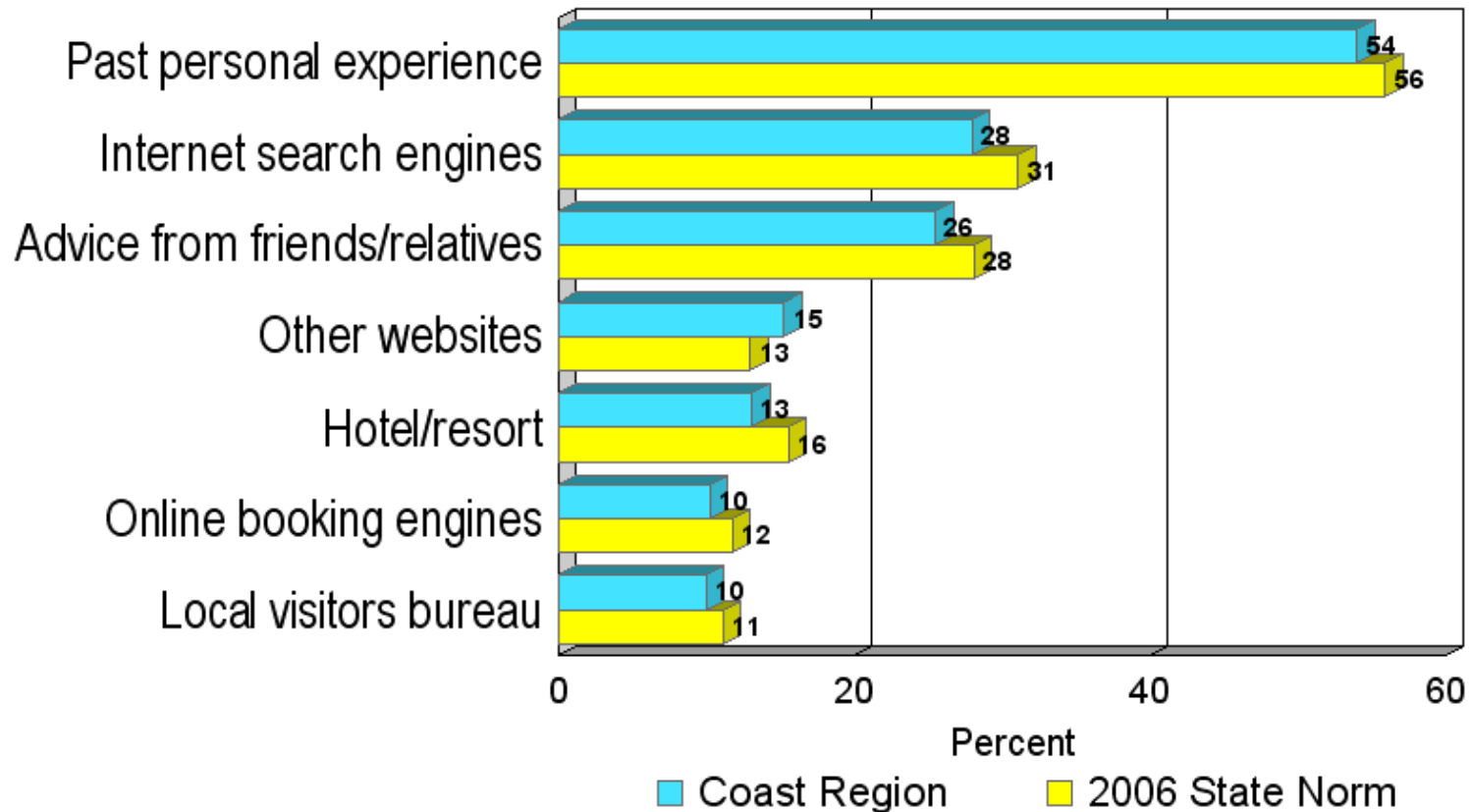
Base: Overnight Marketable Trips



# Information Sources Used for Planning — 2004/2006



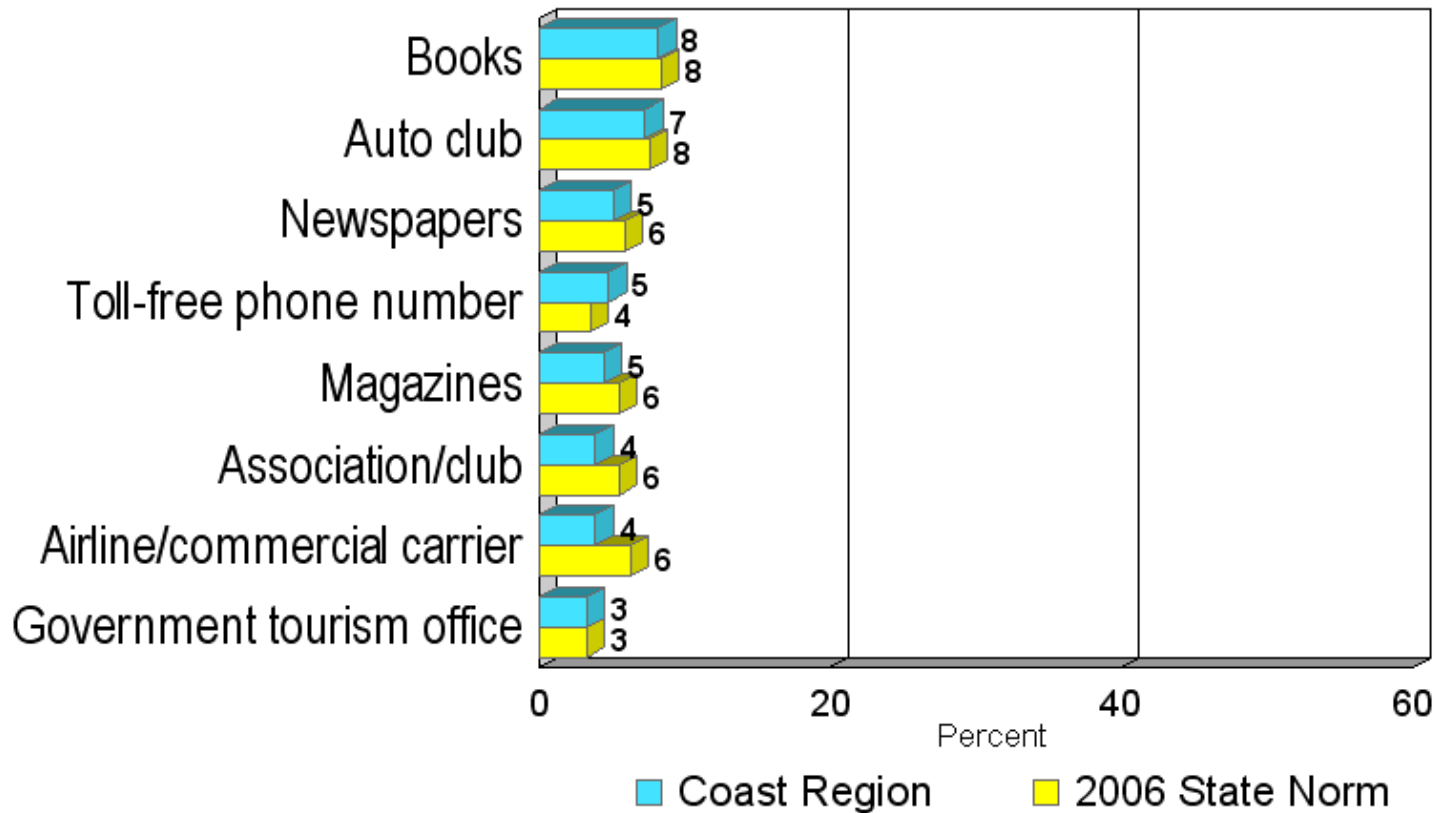
Base: Overnight Marketable Trips



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



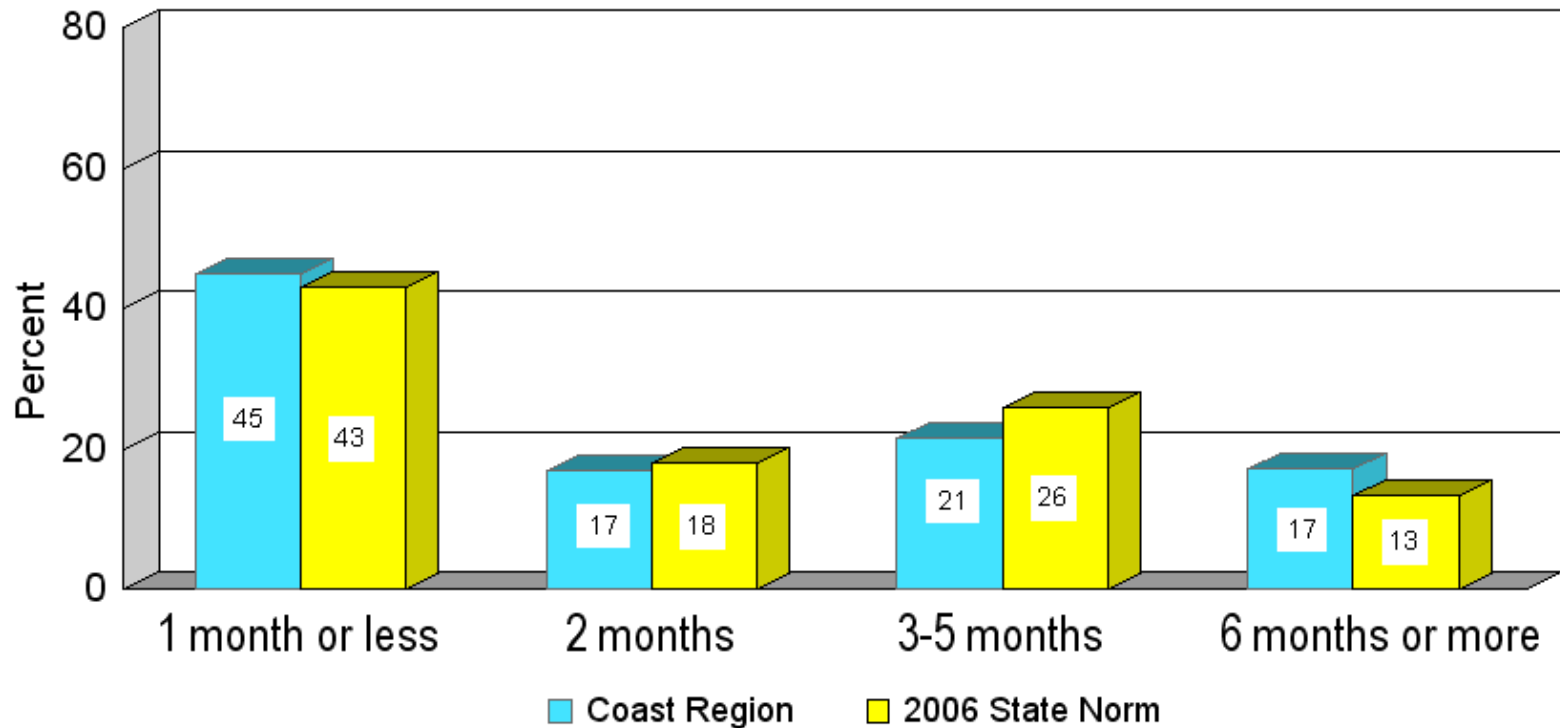
Base: Overnight Marketable Trips



# Booking Cycle — 2004/2006



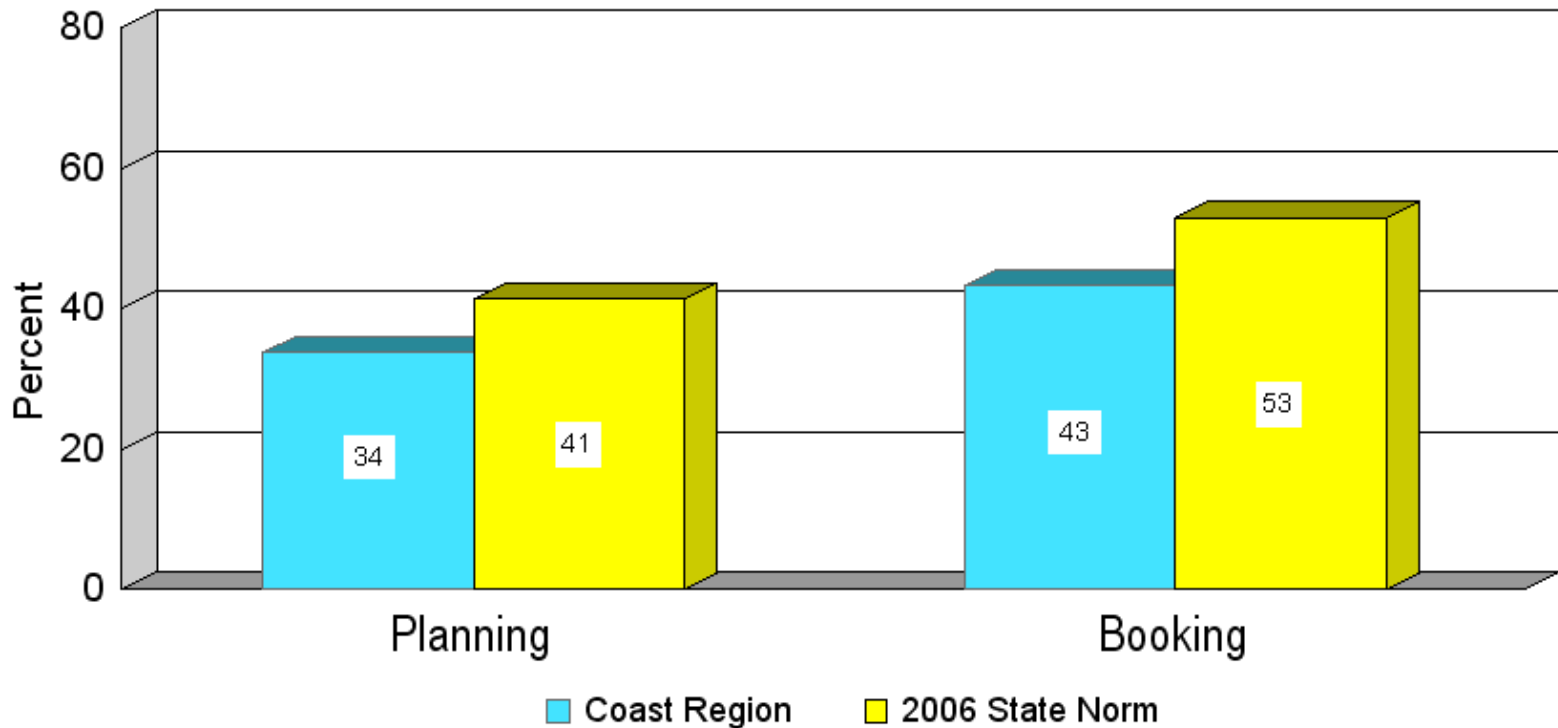
Base: Overnight Marketable Trips Booked in Advance



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



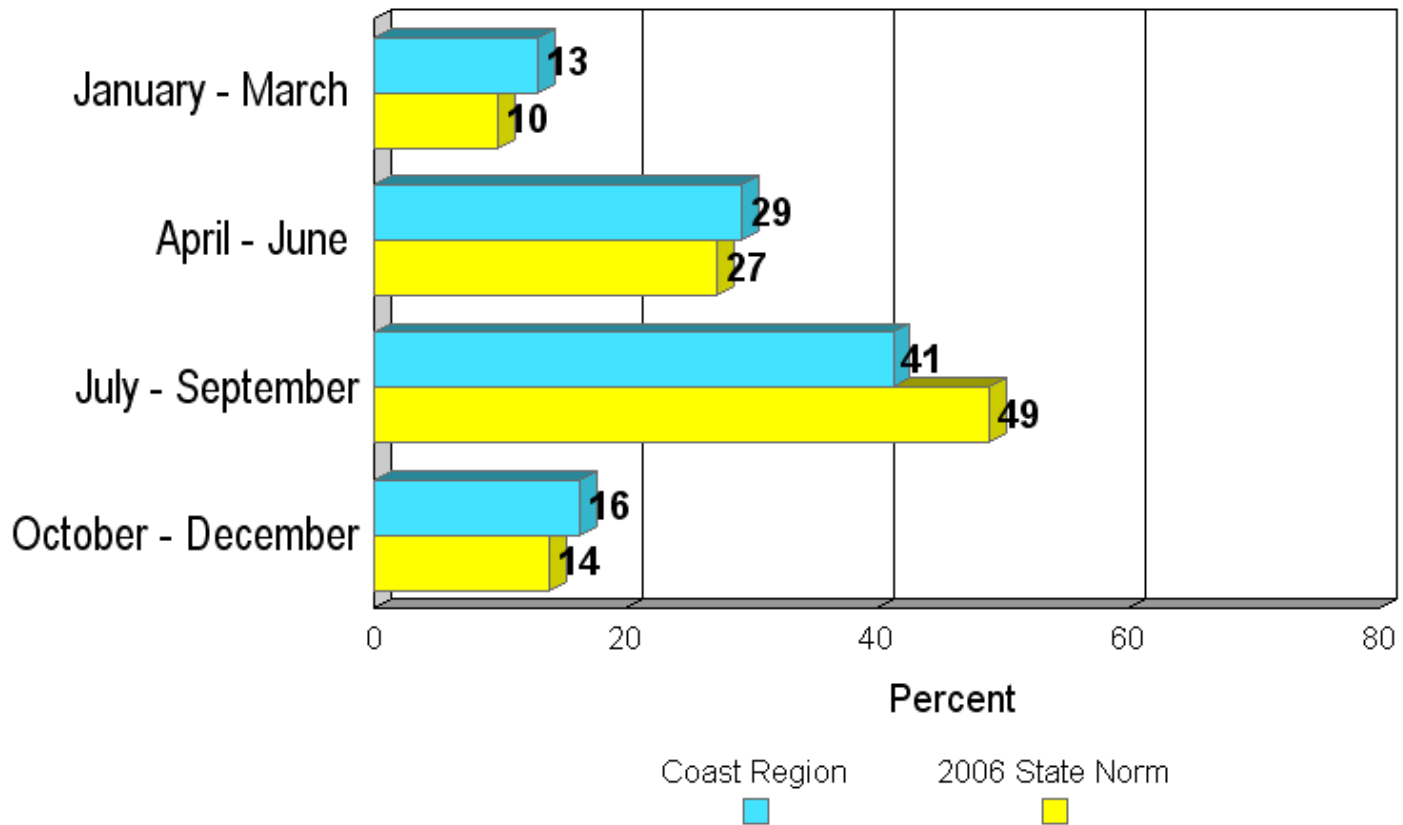
Base: Overnight Marketable Trips



# Trip Seasonality — 2004/2006



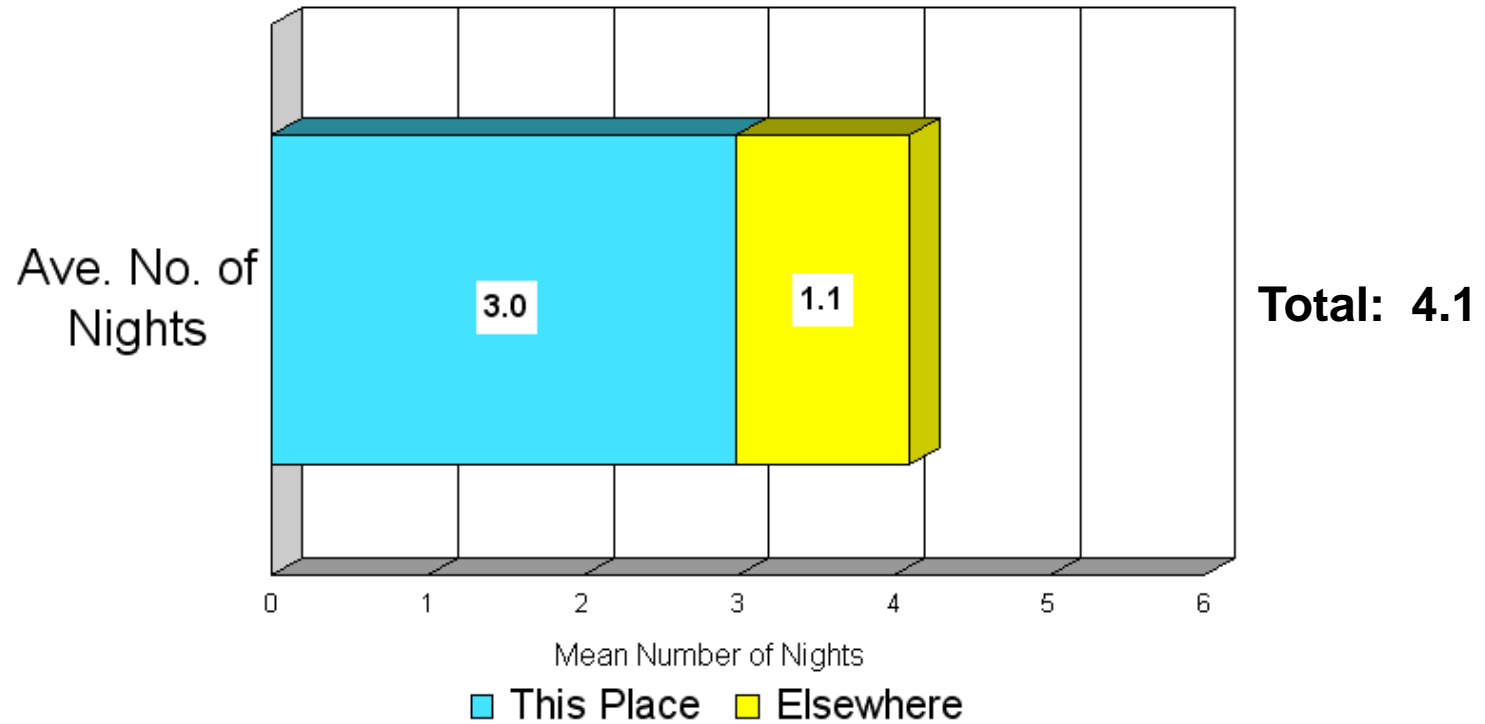
Base: Overnight Marketable Trips



# Length of Stay — 2004/2006



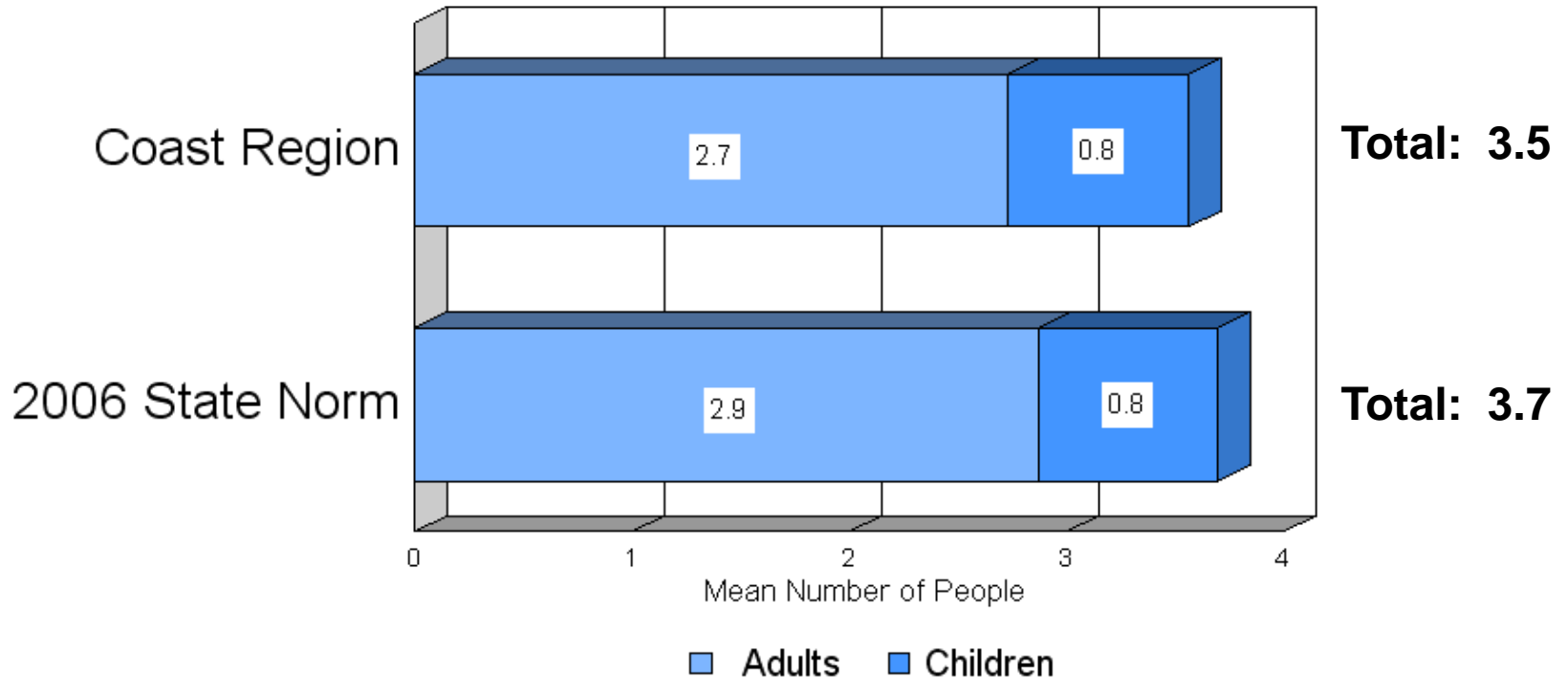
Base: Overnight Marketable Trips



# Size of Travel Party — 2004/2006



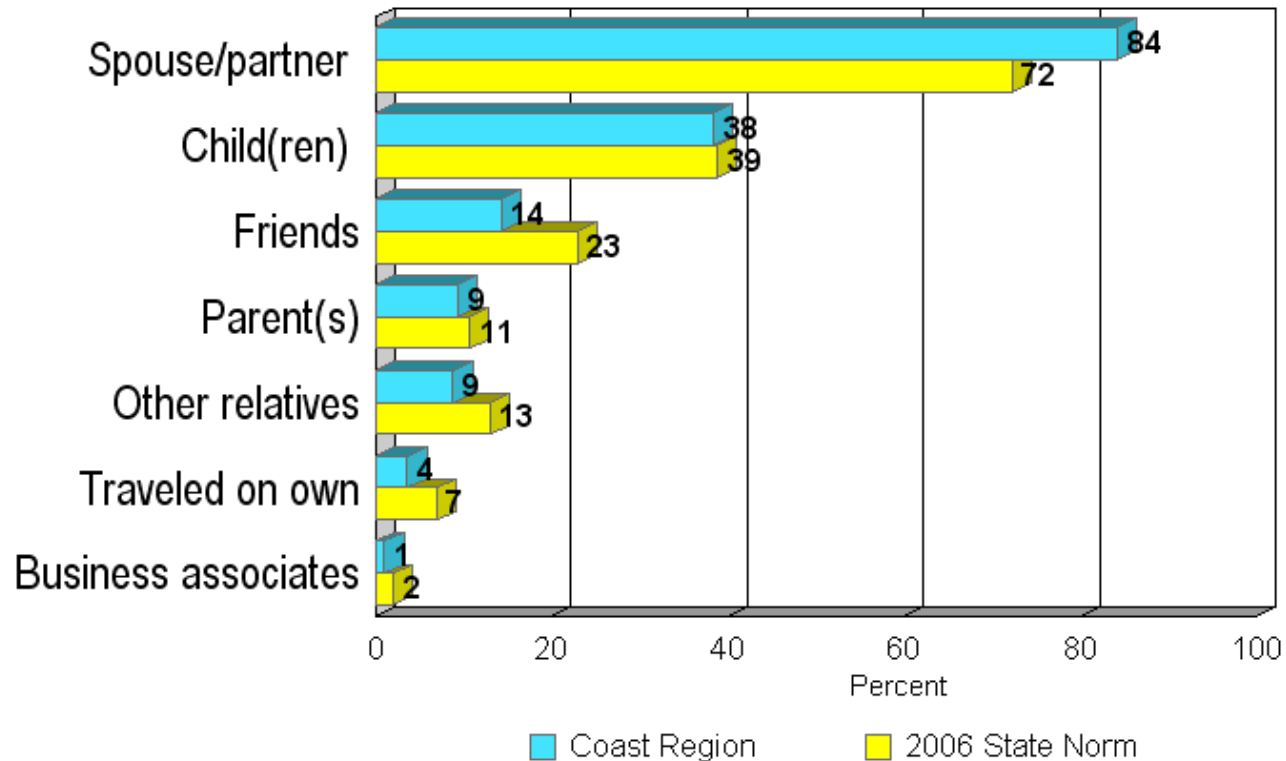
Base: Overnight Marketable Trips



# Travel Party Composition — 2004/2006



Base: Overnight Marketable Trips

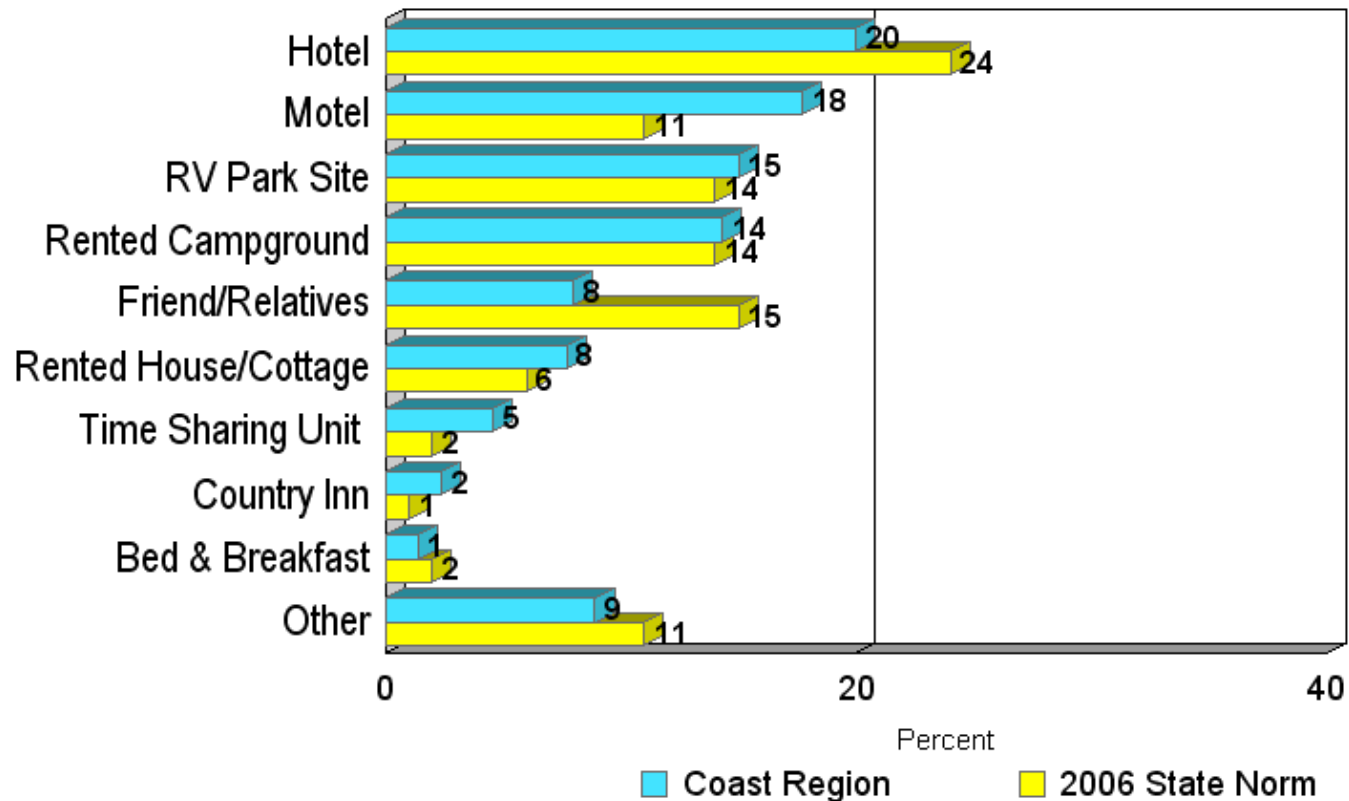


# Accommodation Used\*

## — 2004/2006



Base: Overnight Marketable Trips

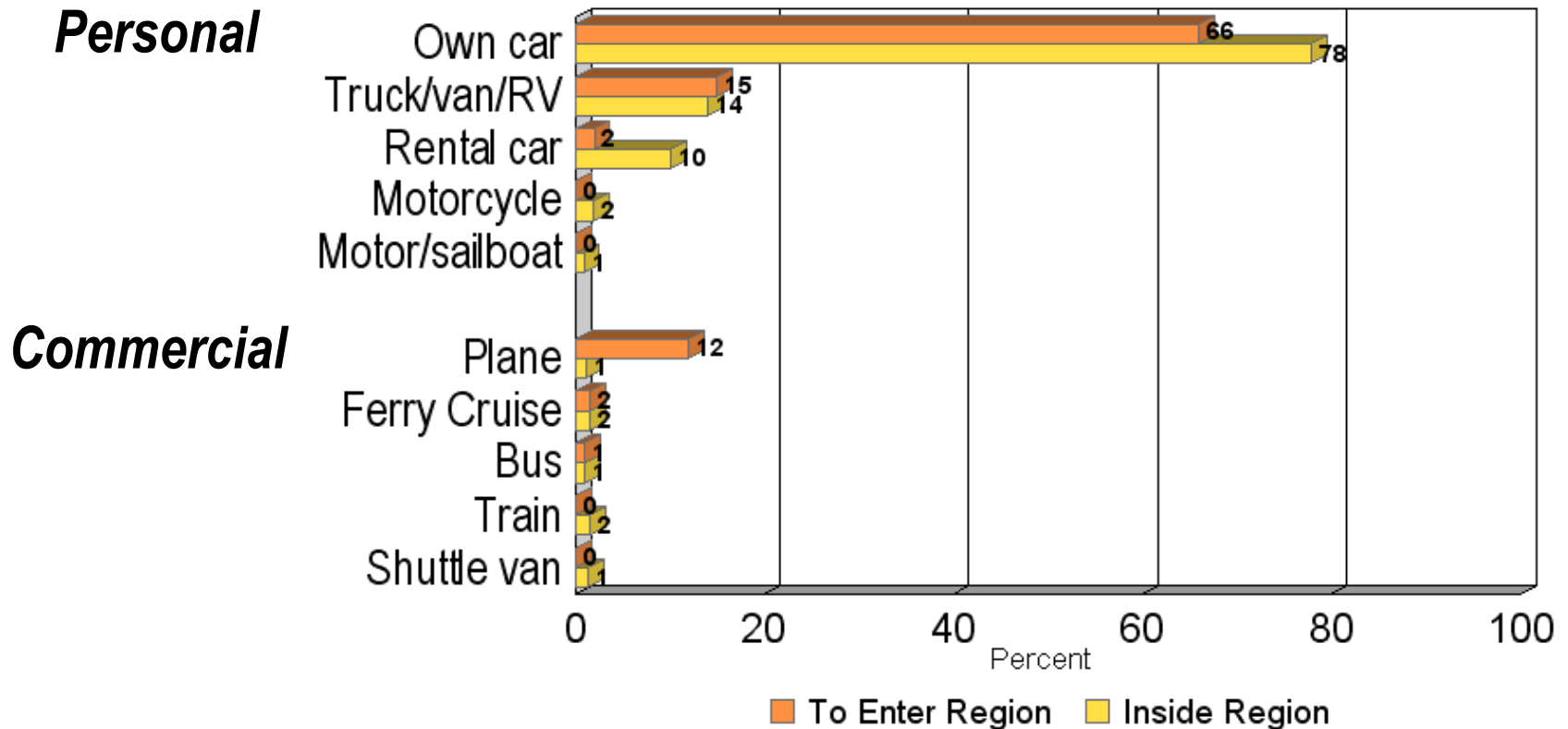


\* Percent of trip nights spent in each type of accommodation

# Transportation Used — 2004/2006



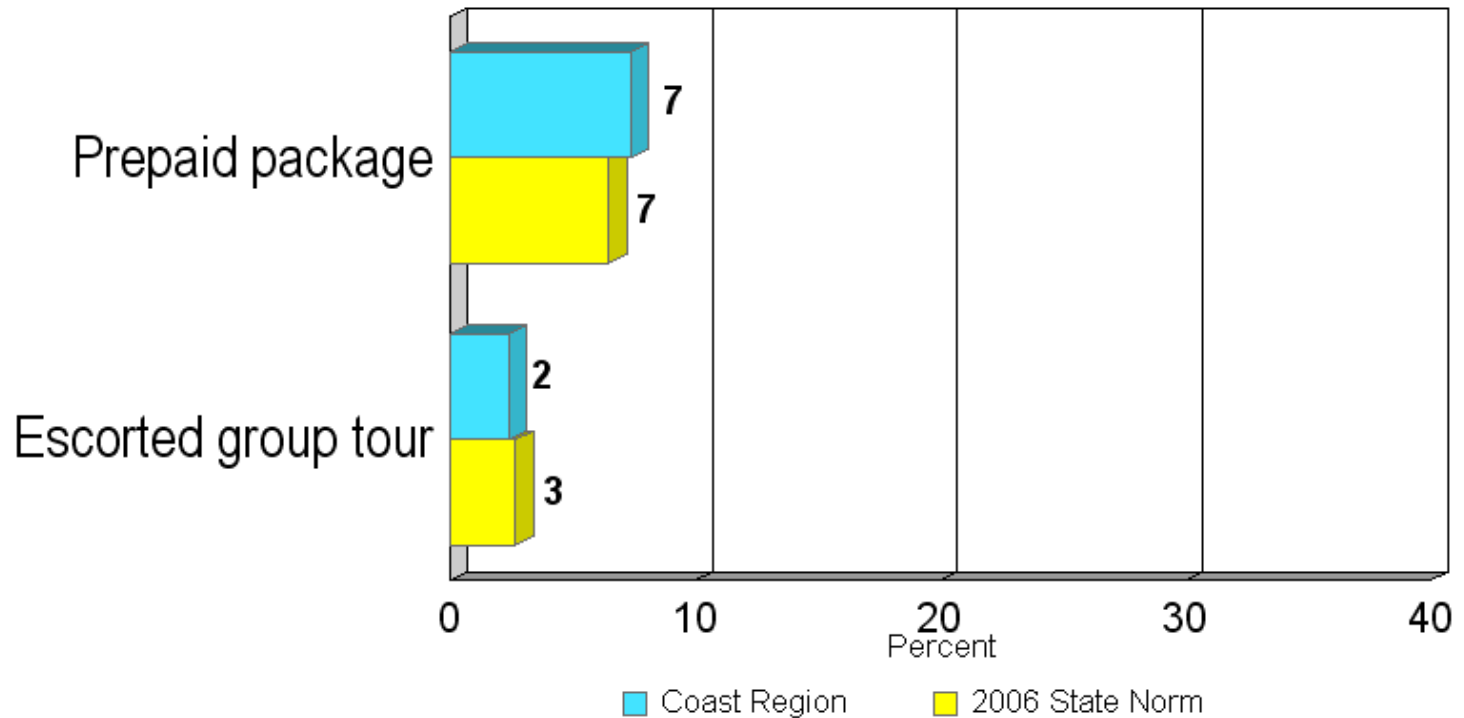
Base: Overnight Marketable Trips



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



Base: Overnight Marketable Trips

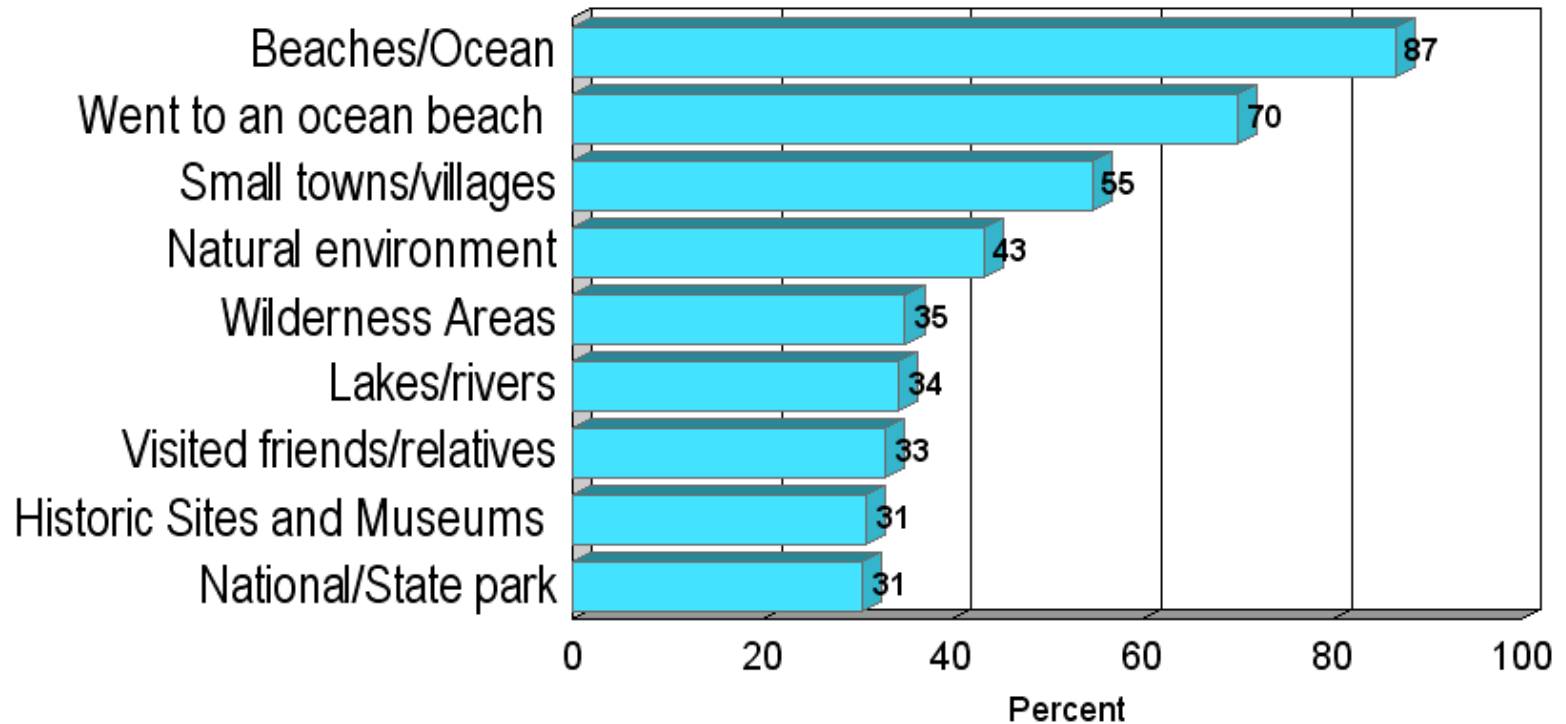


# Marketable Trip Experiences — 2004/2006

# Experiences and Sightseeing — 2004/2006



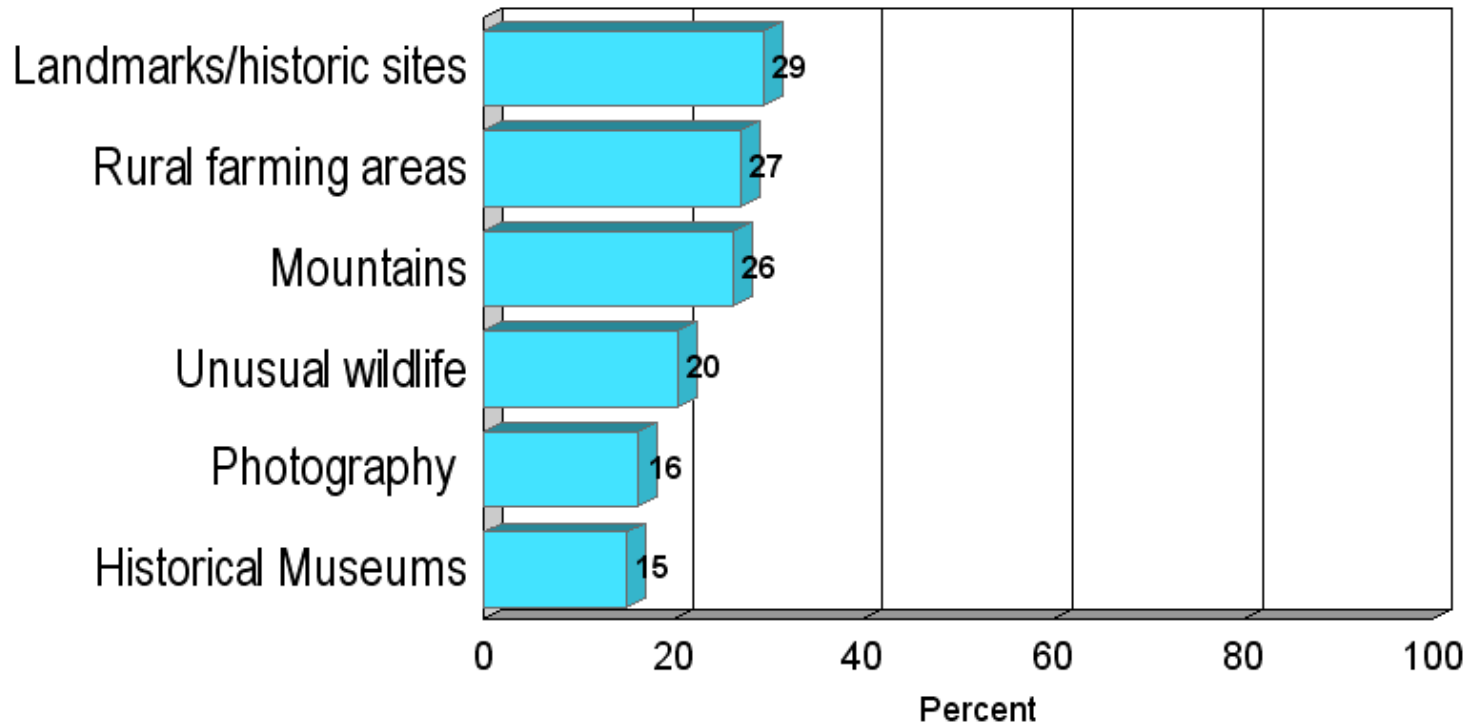
Base: Overnight Marketable Trips



# Experiences and Sightseeing — 2004/2006



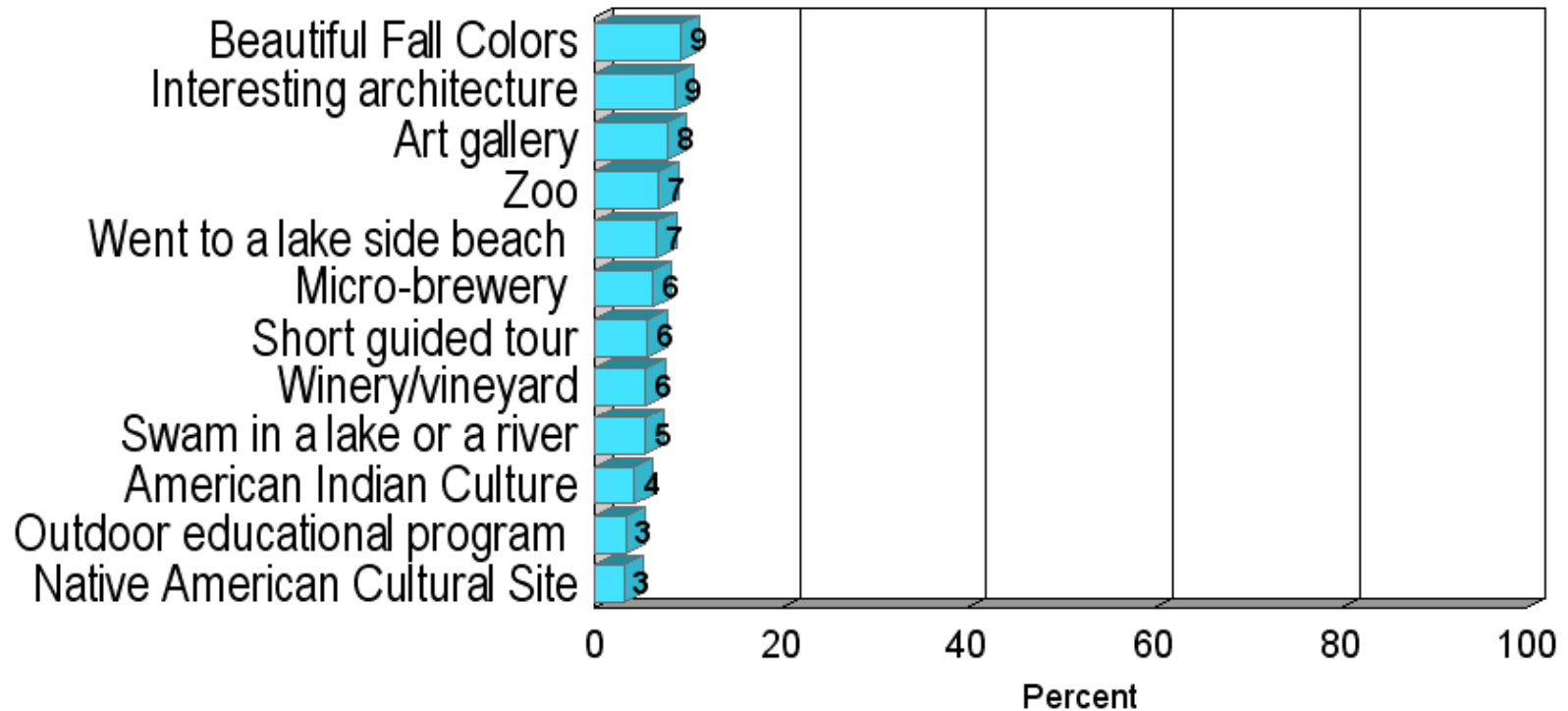
Base: Overnight Marketable Trips



# Experiences and Sightseeing — 2004/2006



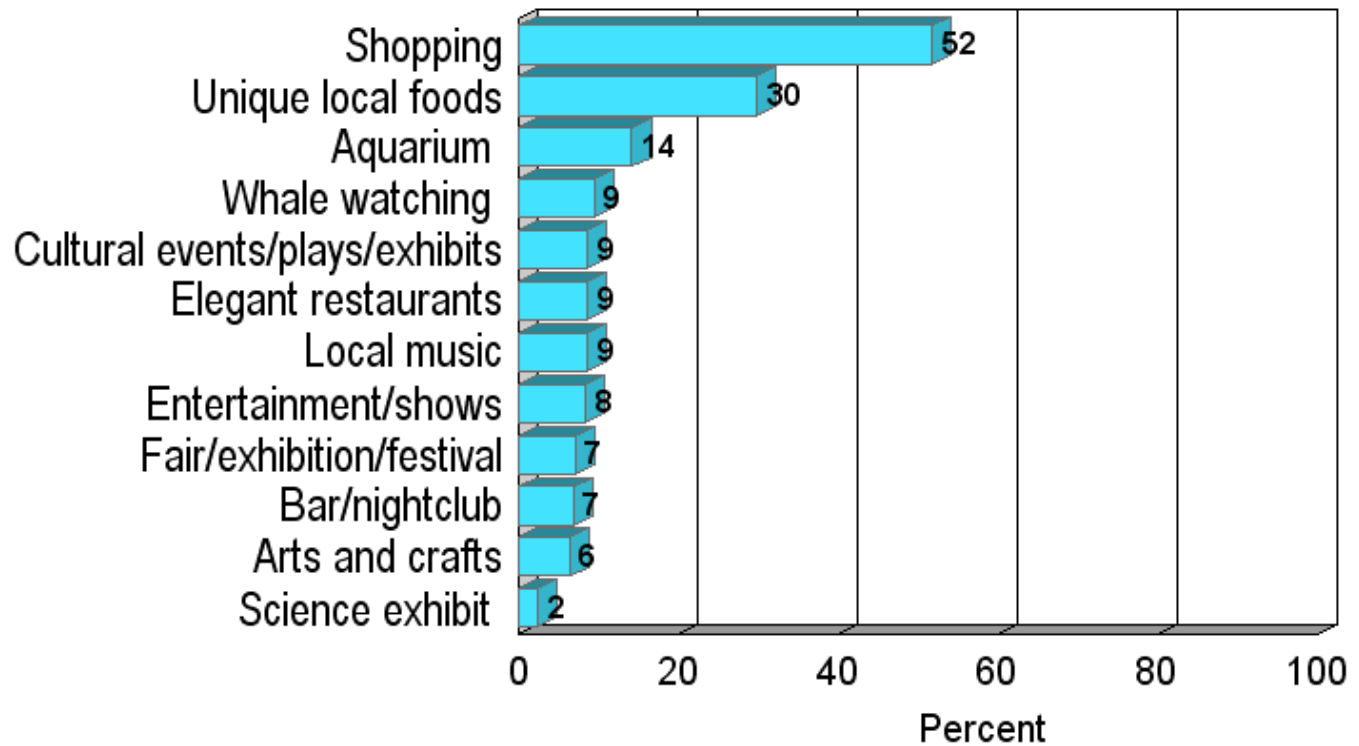
Base: Overnight Marketable Trips



# Entertainment — 2004/2006



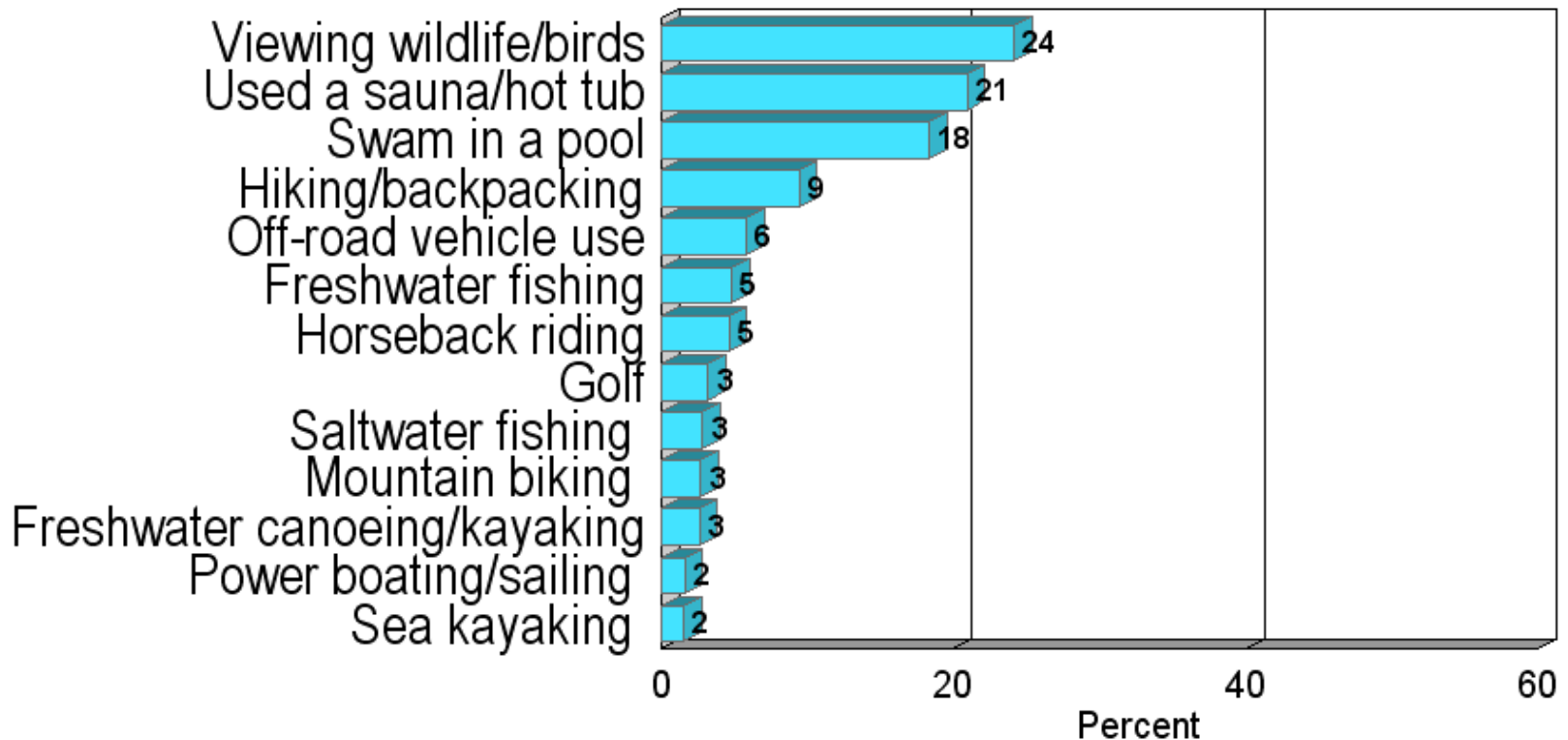
Base: Overnight Marketable Trips



# Sports & Recreation — 2004/2006



Base: Overnight Marketable Trips

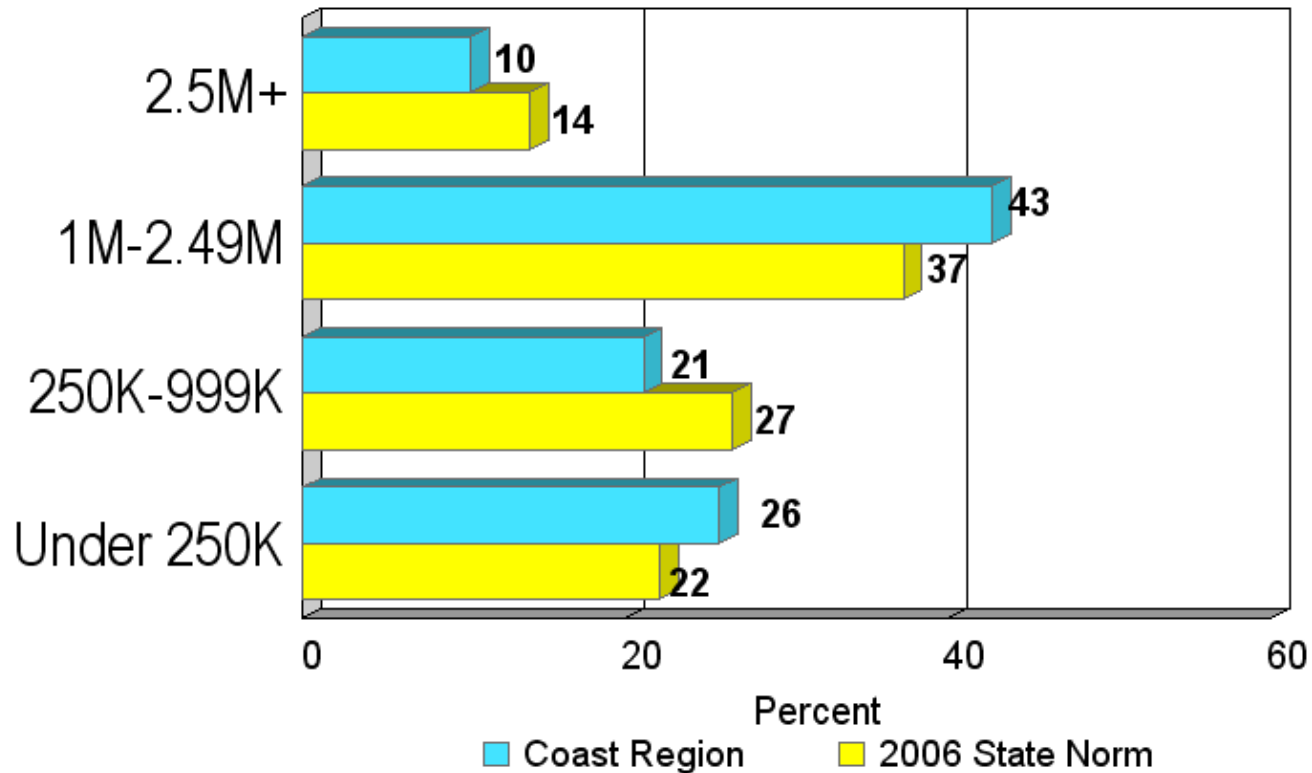


# Marketable Visitor Profile — 2004/2006

# Community Size — 2004/2006



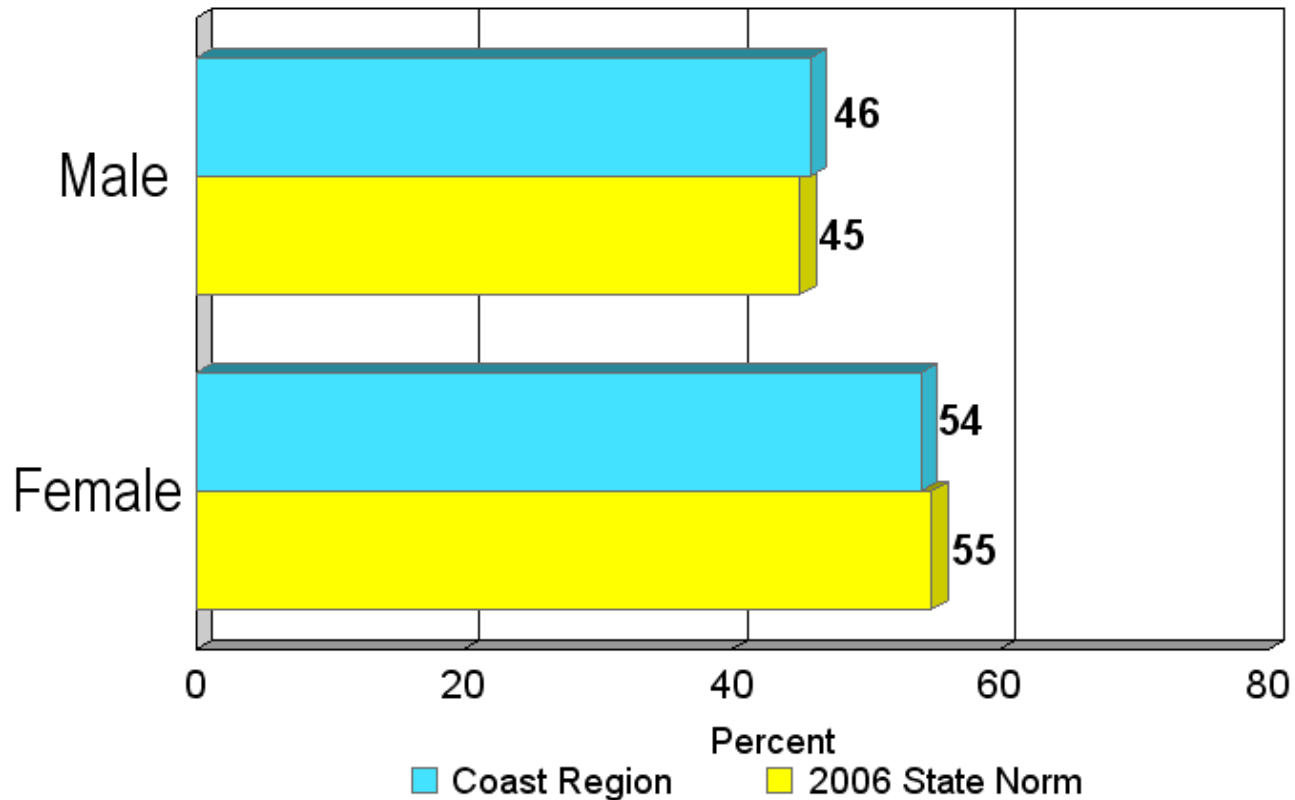
Base: Overnight Marketable Trips



# Gender — 2004/2006



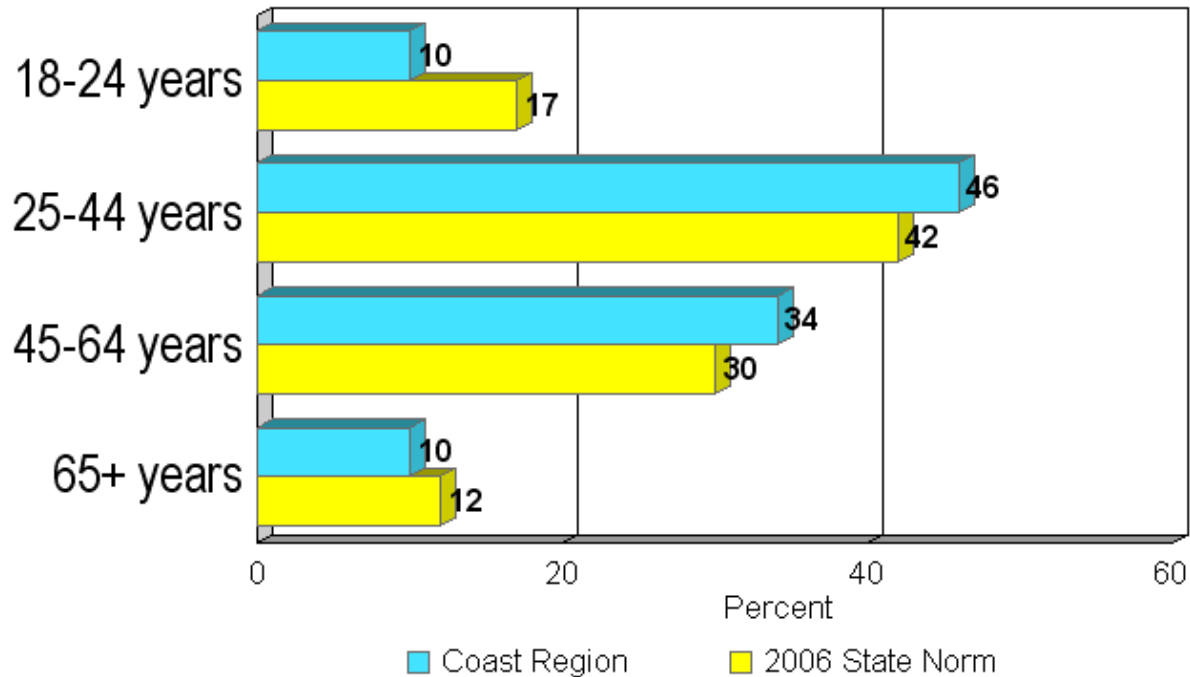
Base: Overnight Marketable Trips



# Age — 2004/2006



Base: Overnight Marketable Trips

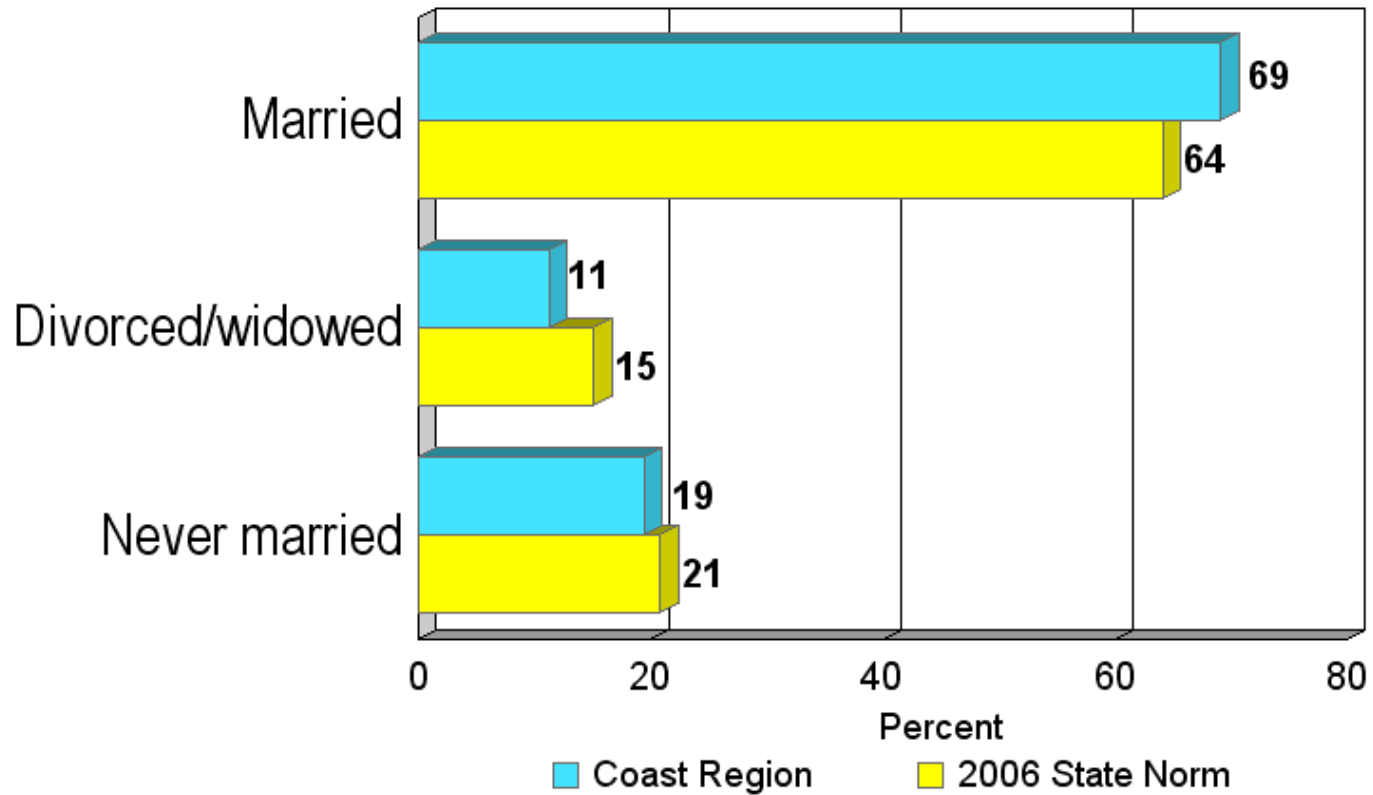


	<u>Coast Region</u>	<u>2006 State</u>
Average Age	43.6	41.9

# Marital Status — 2004/2006



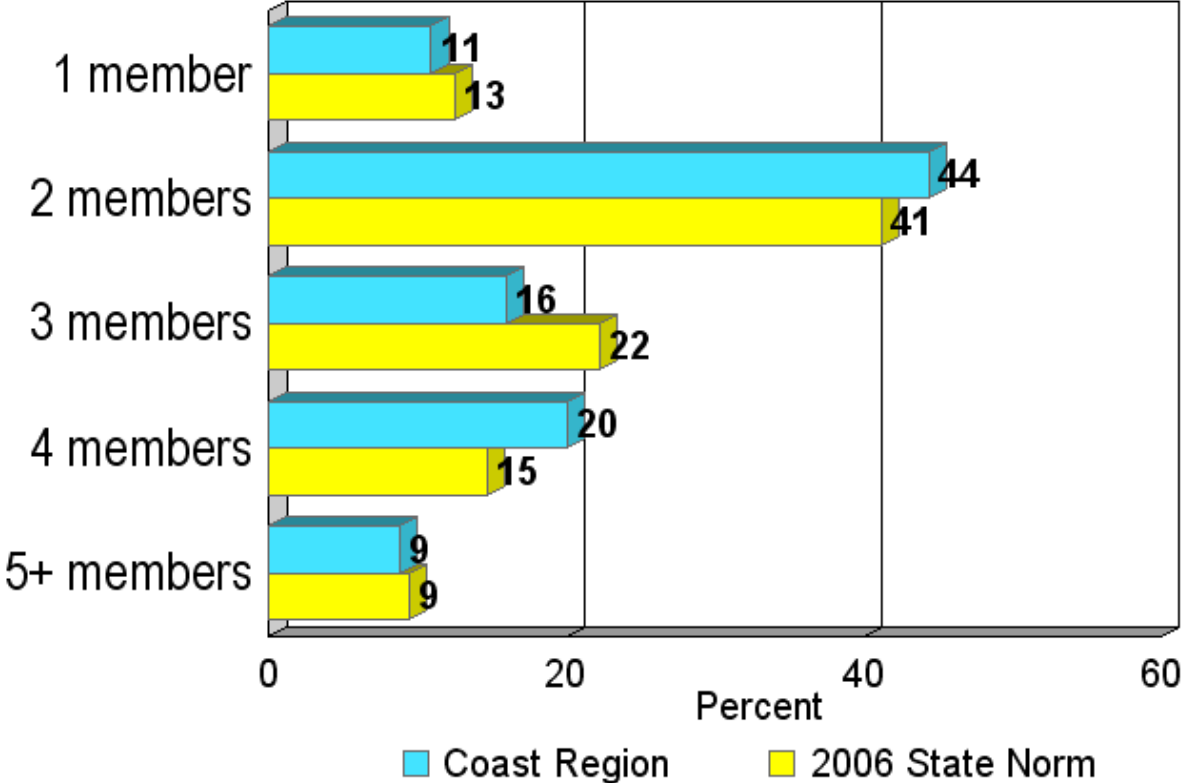
Base: Overnight Marketable Trips



# Household Size — 2004/2006



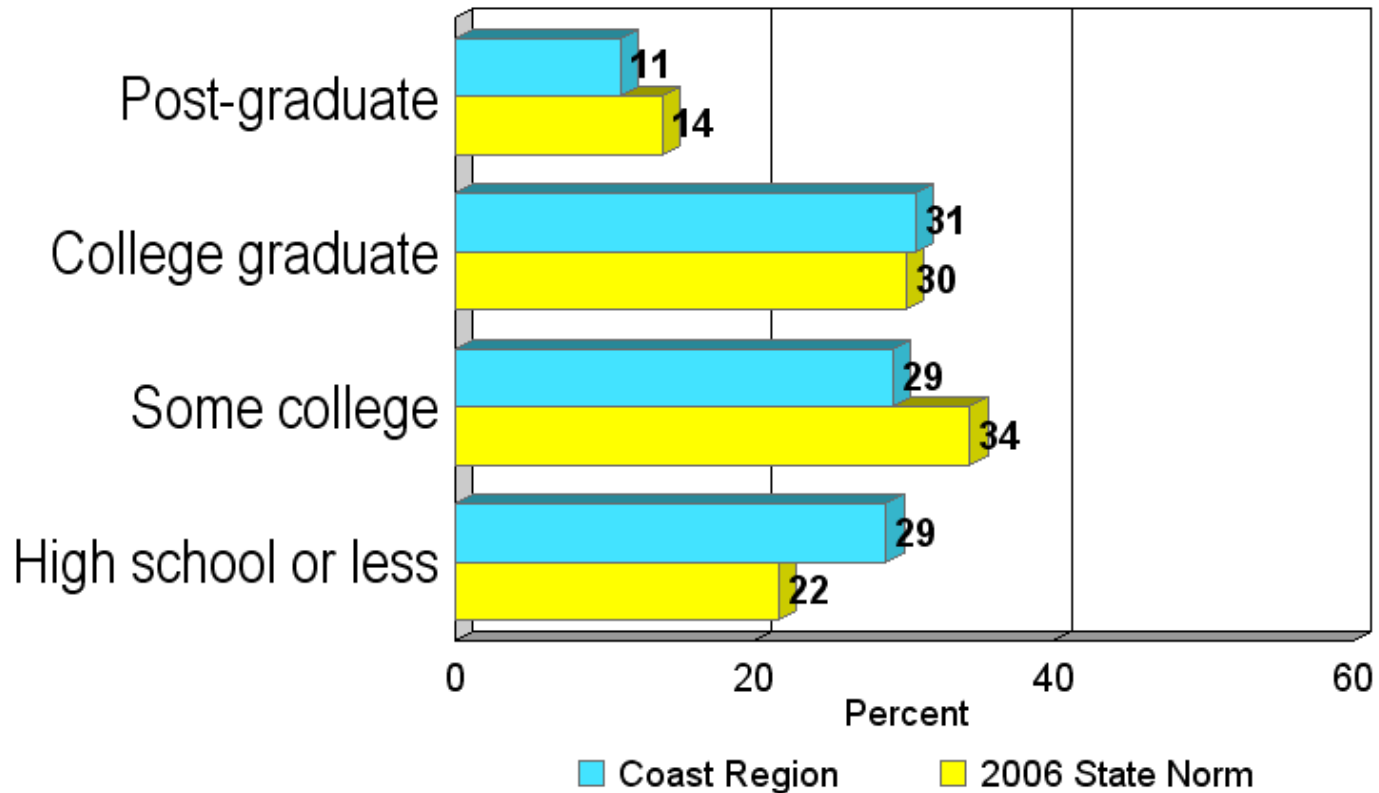
Base: Overnight Marketable Trips



# Education — 2004/2006



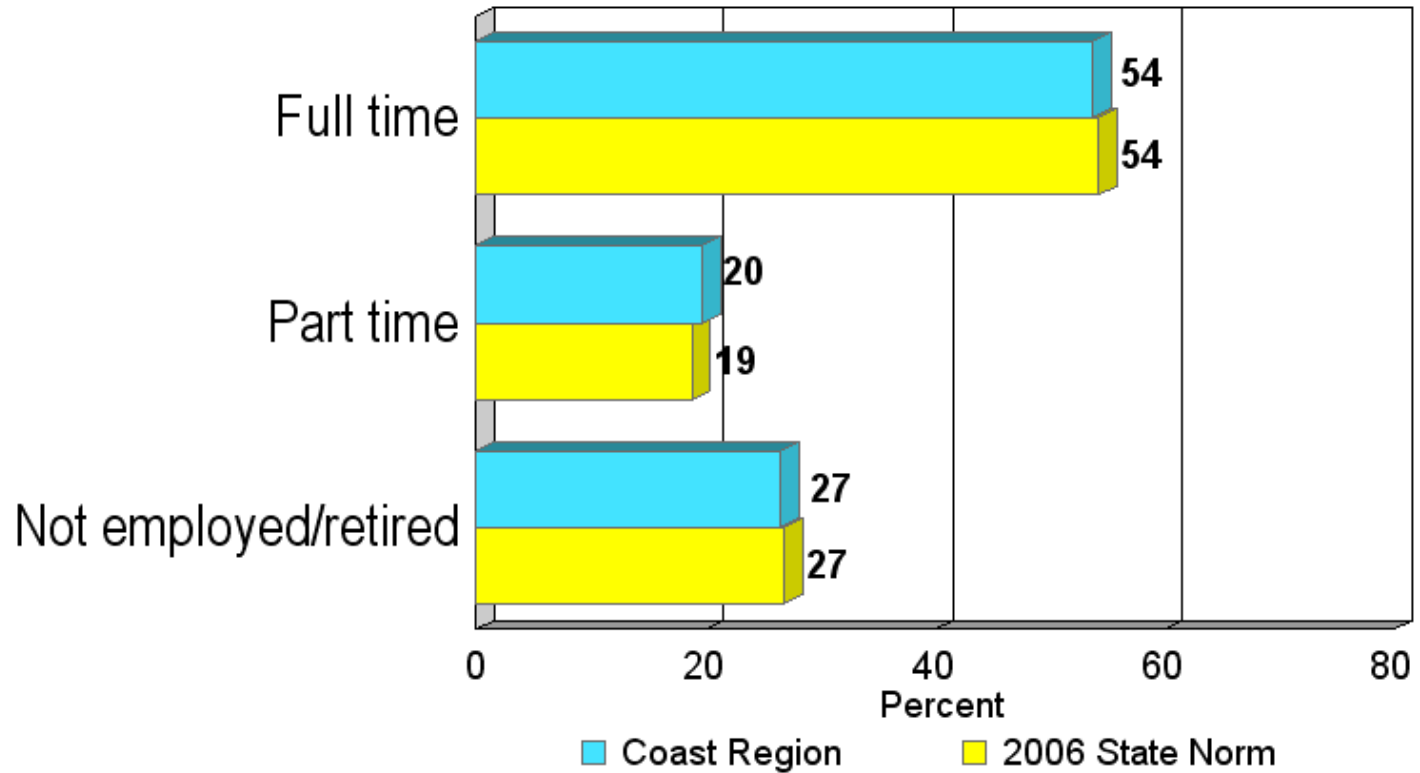
Base: Overnight Marketable Trips



# Employment — 2004/2006



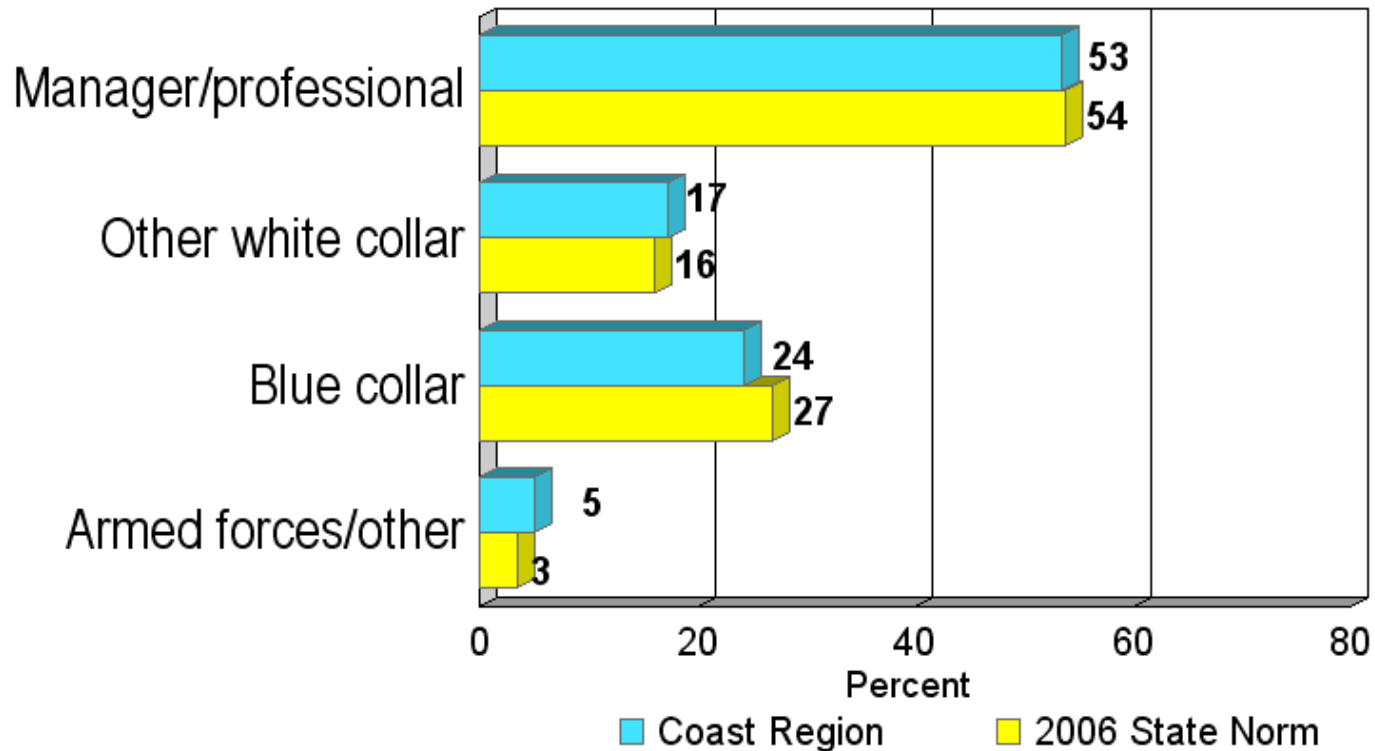
Base: Overnight Marketable Trips



# Occupation — 2004/2006



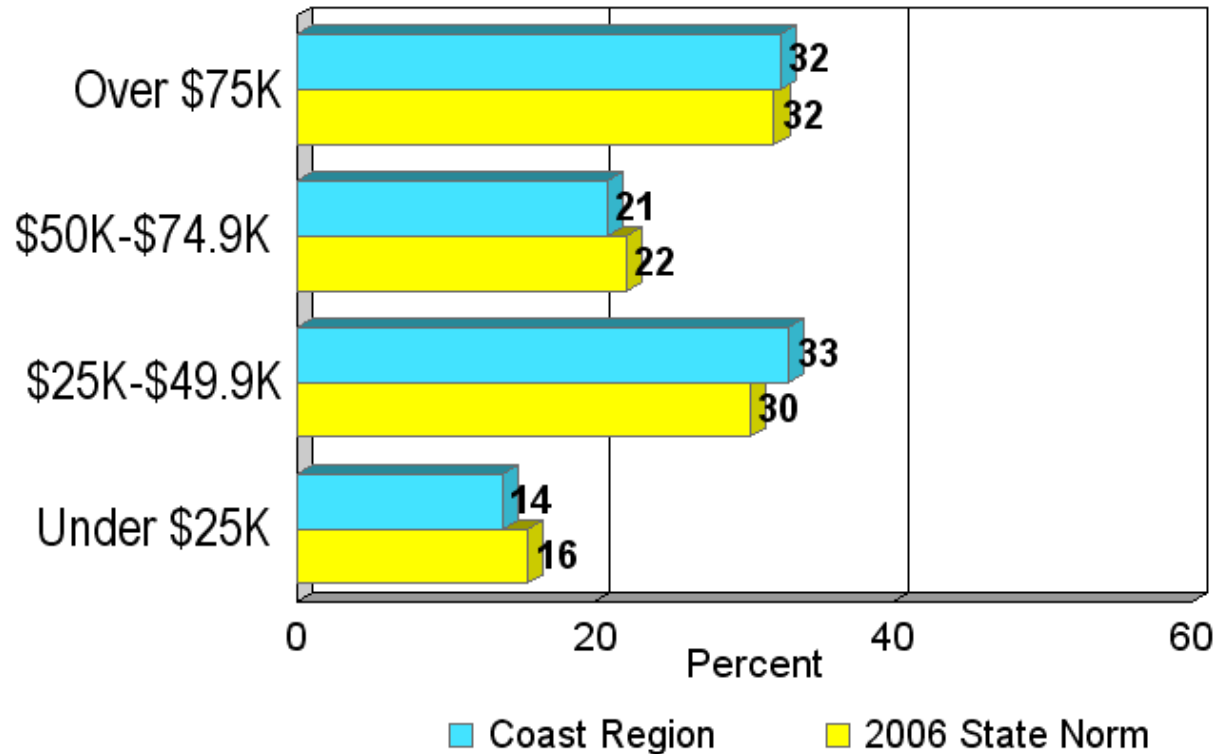
Base: Overnight Marketable Trips



# Income — 2004/2006



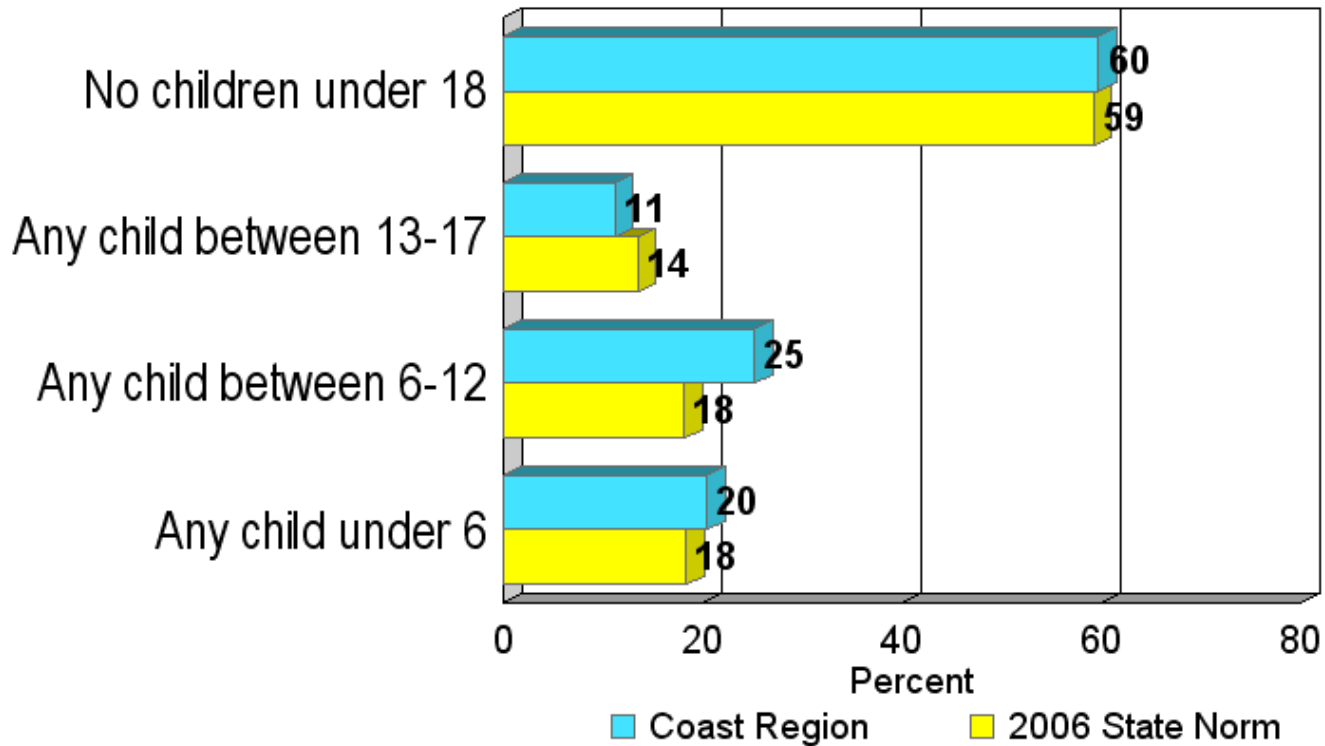
Base: Overnight Marketable Trips



# Children in Household — 2004/2006

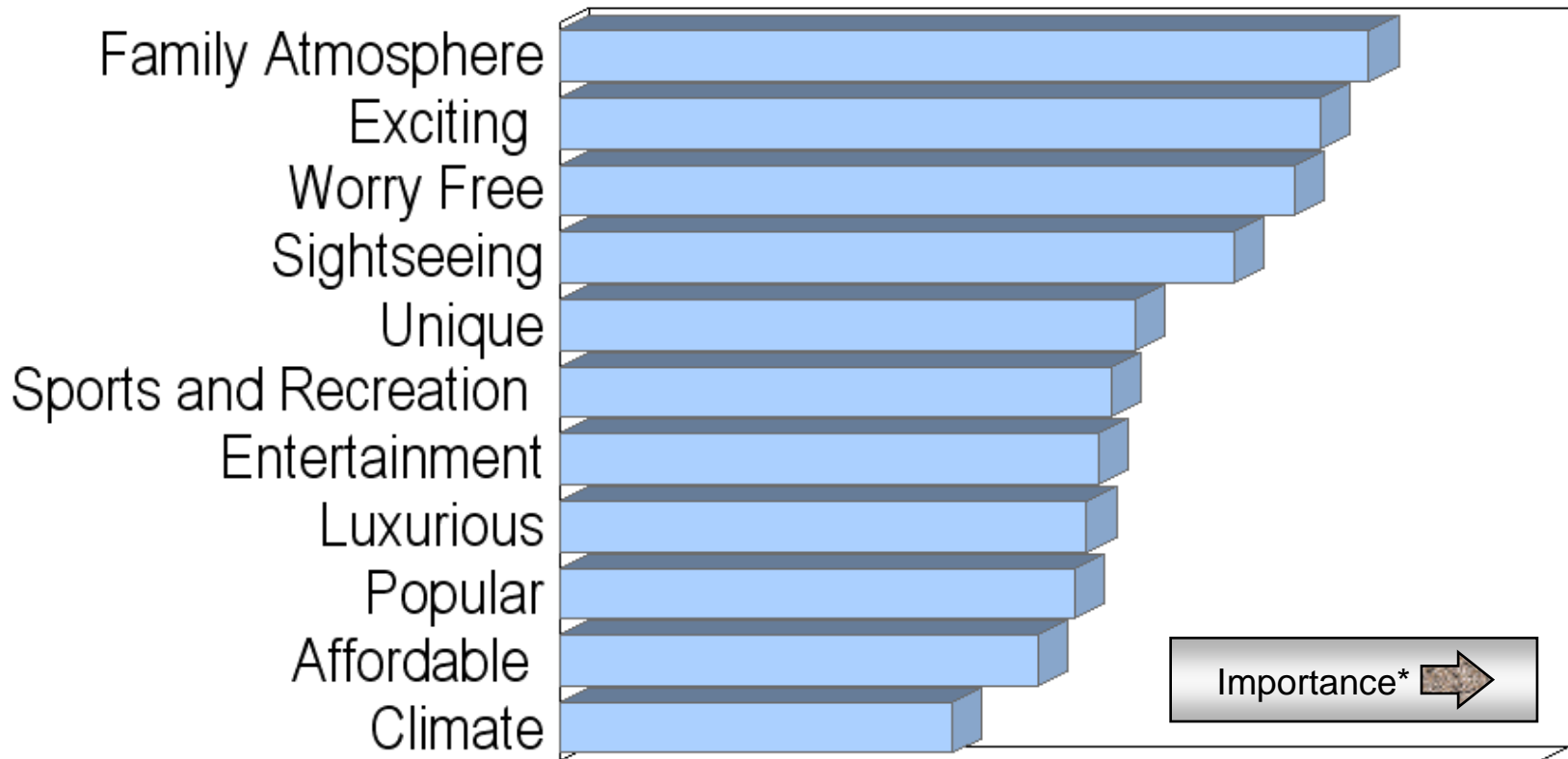


Base: Overnight Marketable Trips



(Oregon) Visitor Priorities  
and Product Delivery  
Among Travelers to the Coast Region  
— 2004/2006

# Oregon Visitor Priorities

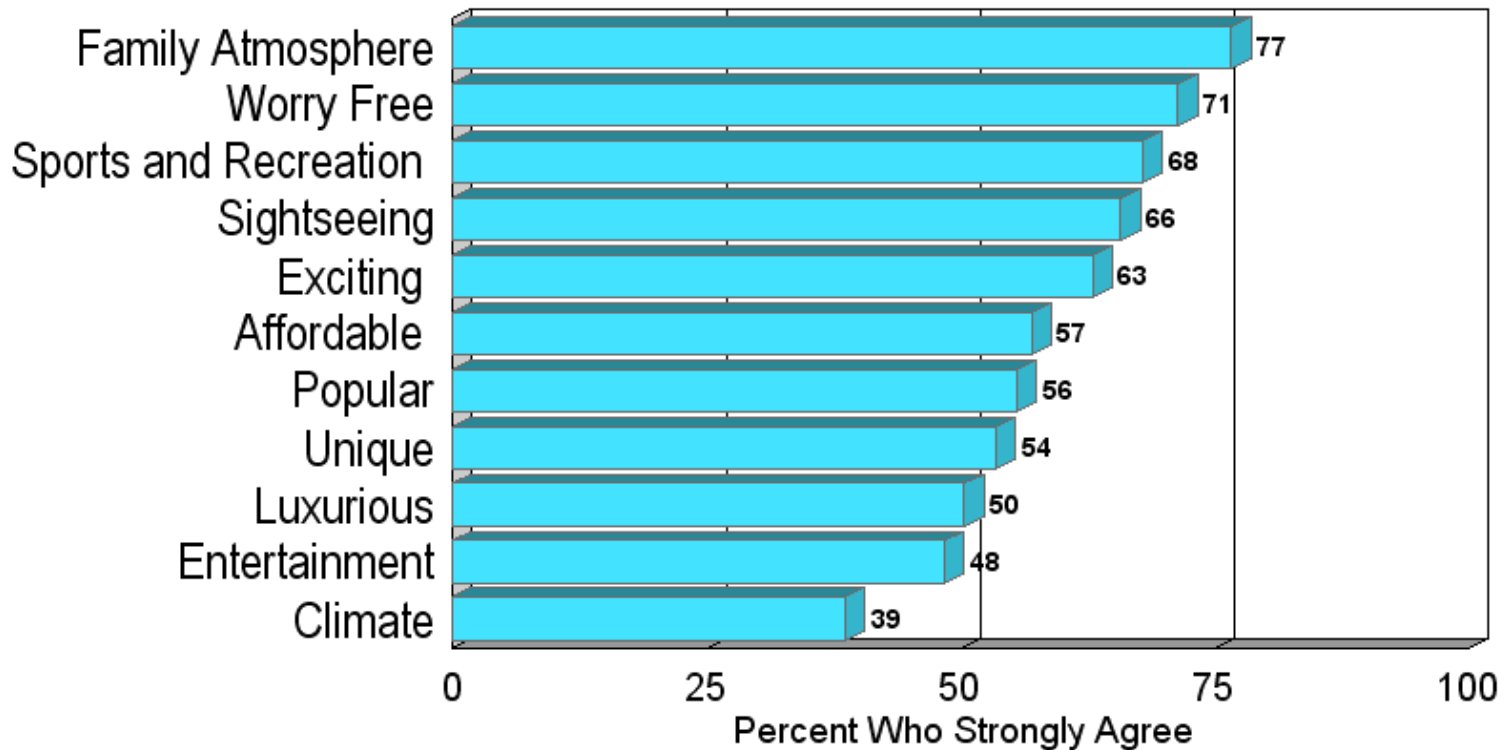


•A measure of the degree of association between each factor and whether destination is a place “I would really enjoy visiting.”

# Product Delivery On Visitor Priorities — 2004/2006



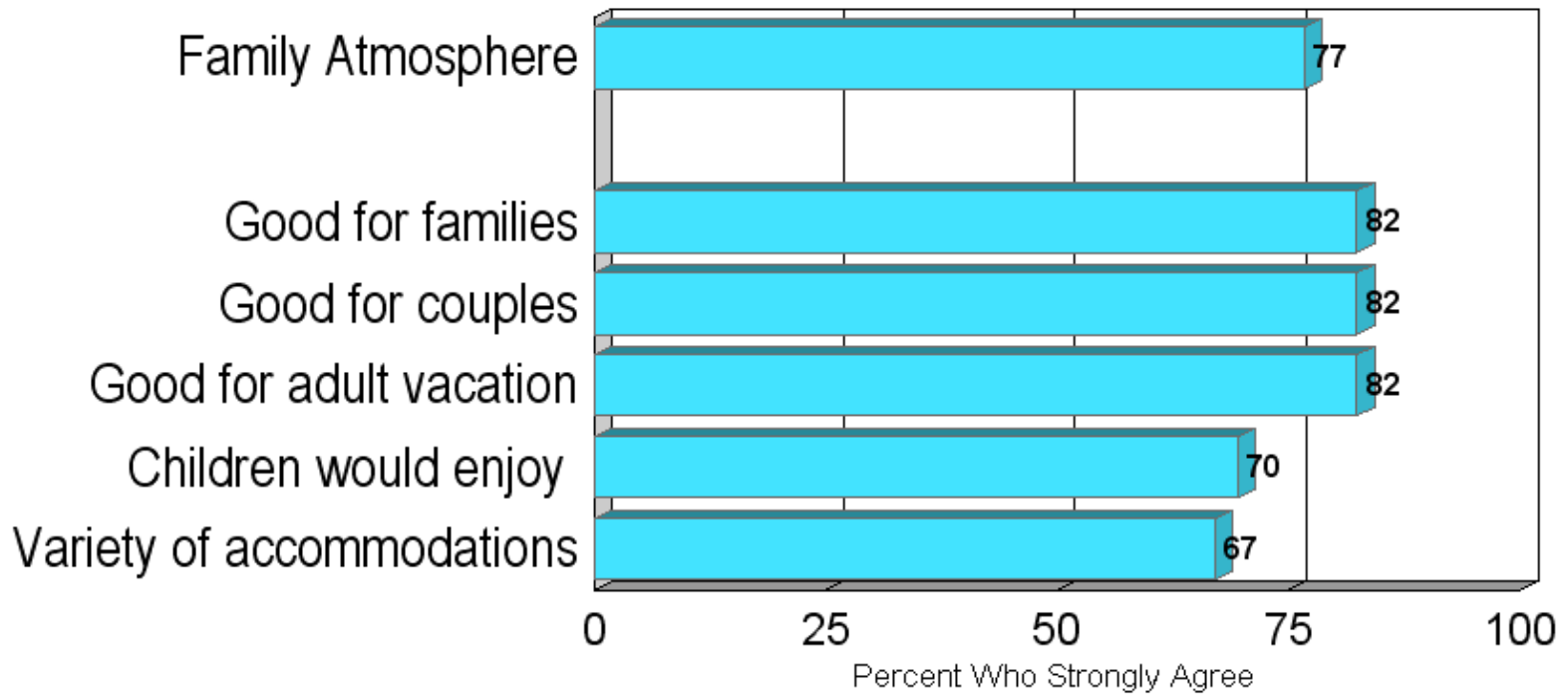
Base: Overnight Marketable Trips



# Family Atmosphere — 2004/2006



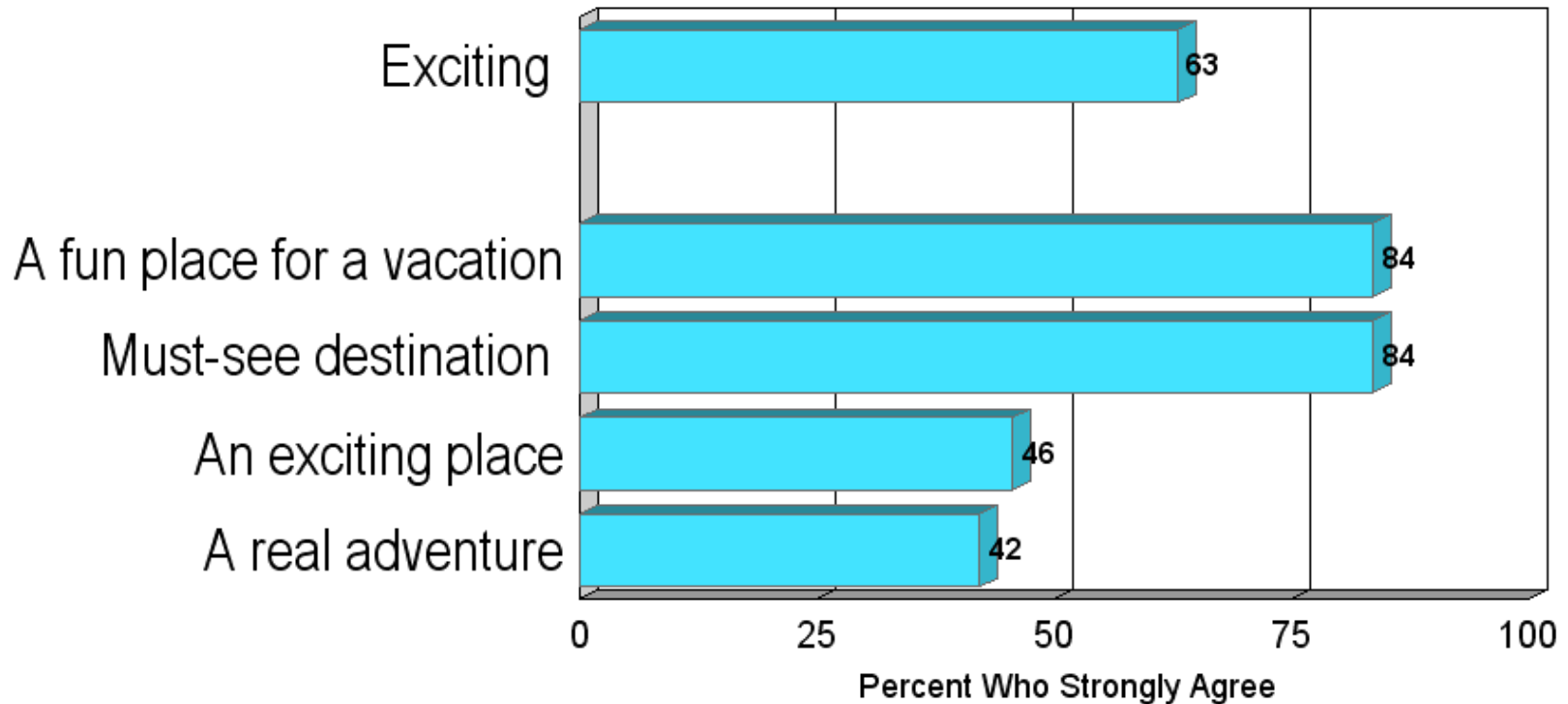
Base: Overnight Marketable Trips



# Exciting — 2004/2006



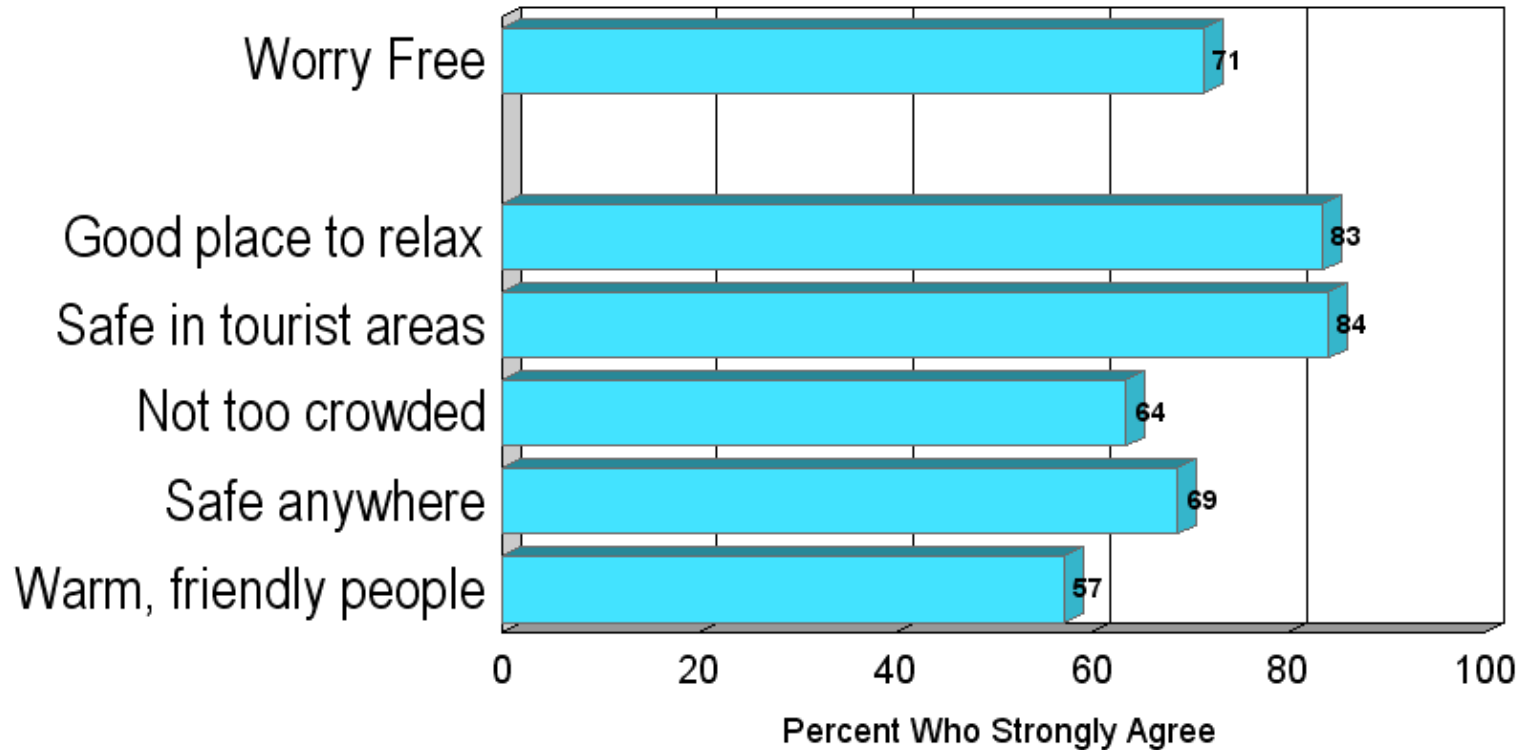
Base: Overnight Marketable Trips



# Worry Free — 2004/2006



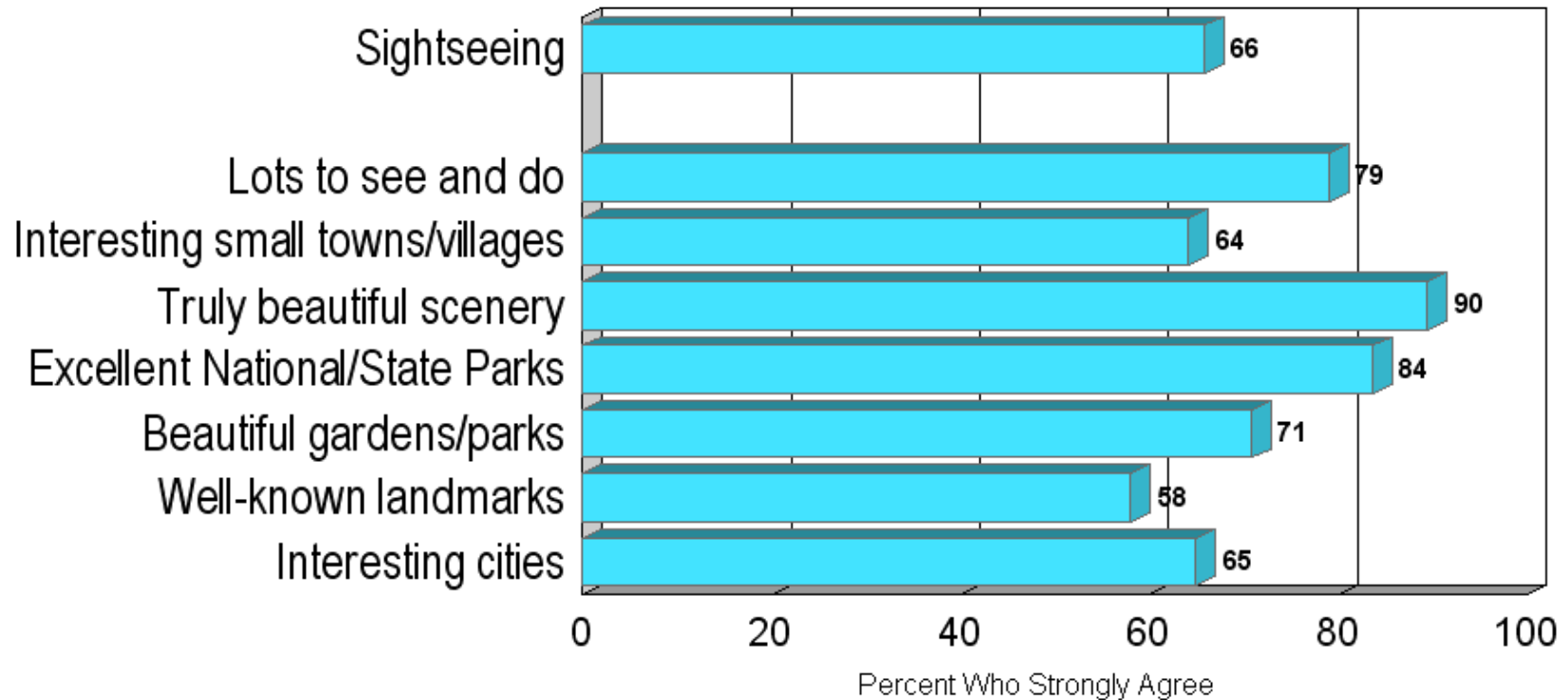
Base: Overnight Marketable Trips



# Sightseeing — 2004/2006



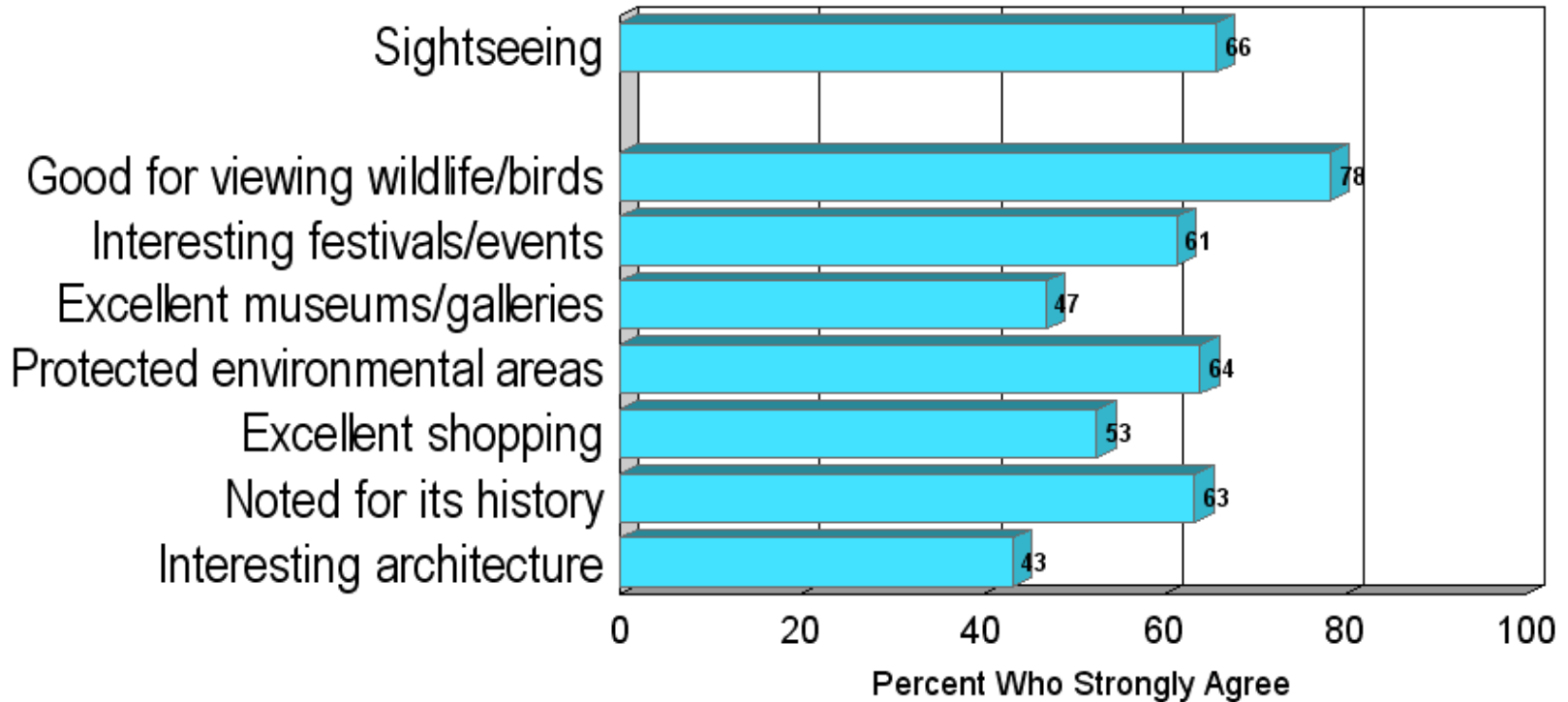
Base: Overnight Marketable Trips



# Sightseeing — 2004/2006 (Cont'd)



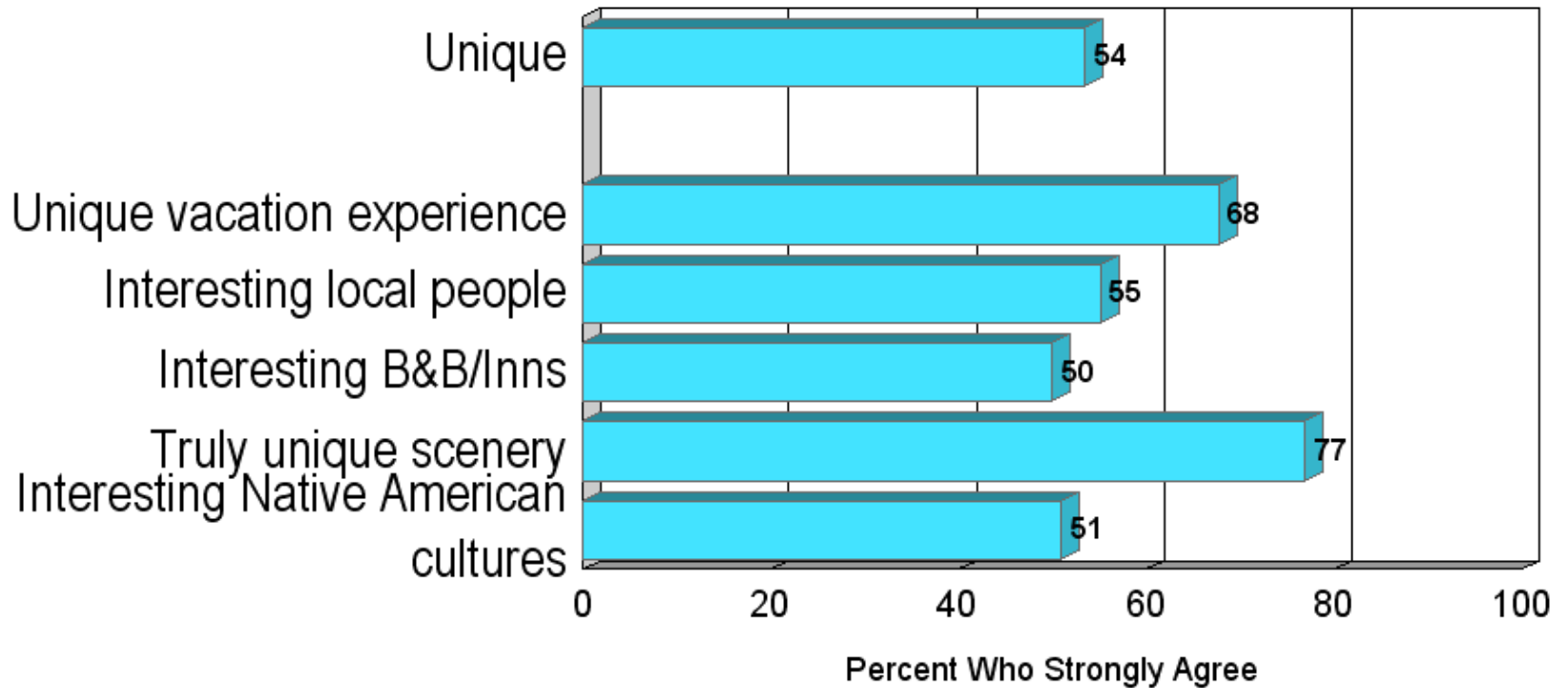
Base: Overnight Marketable Trips



# Unique — 2004/2006



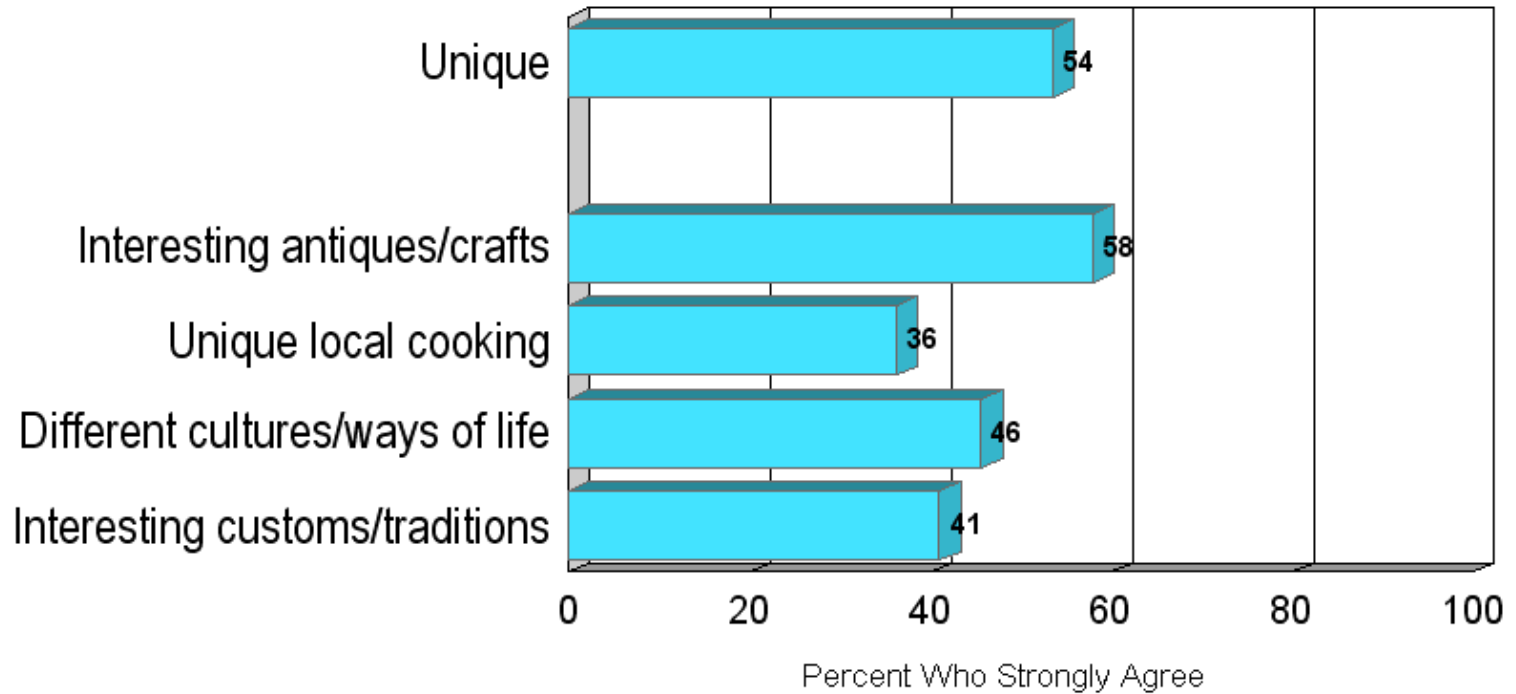
Base: Overnight Marketable Trips



# Unique — 2004/2006 (Cont'd)



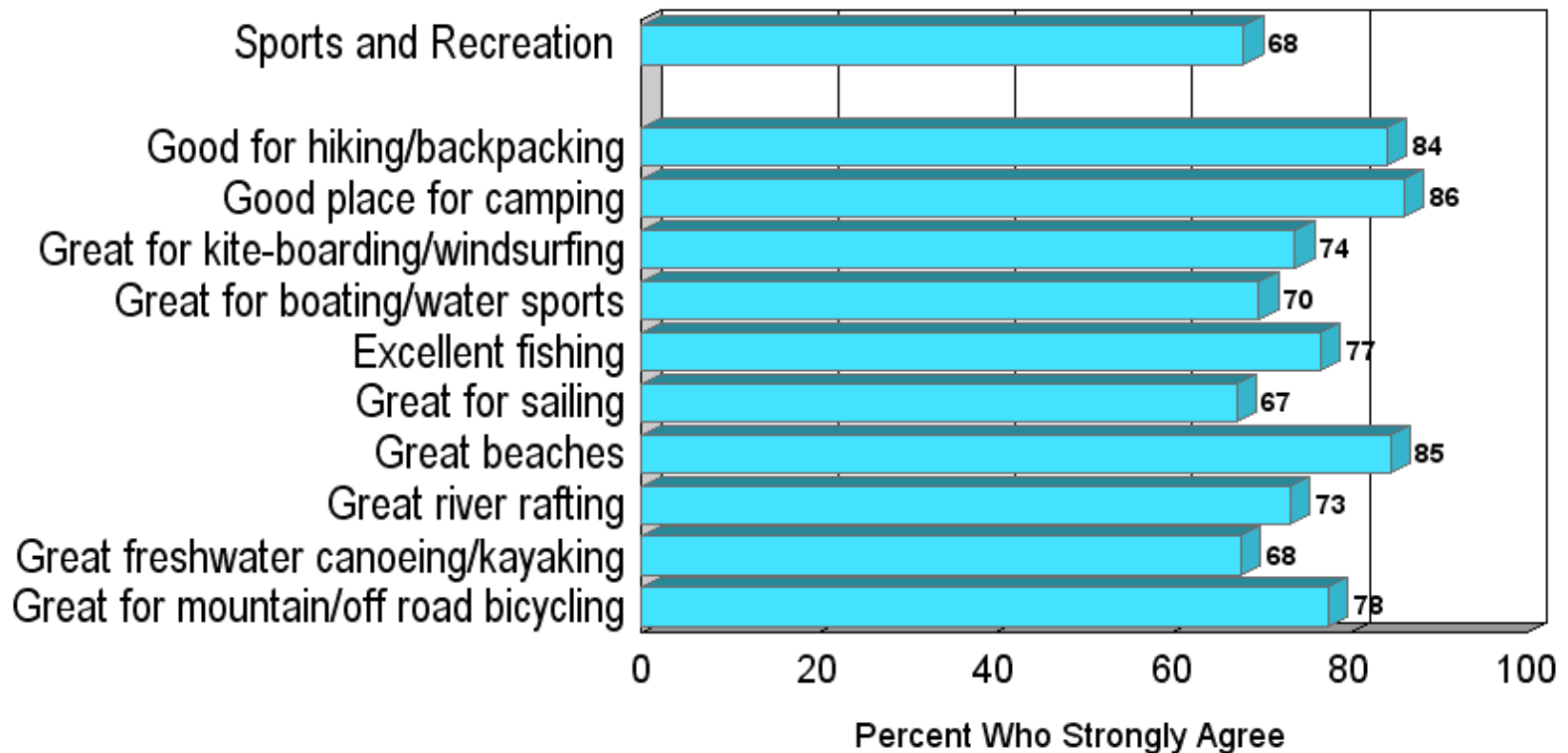
Base: Overnight Marketable Trips



# Sports and Recreation — 2004/2006



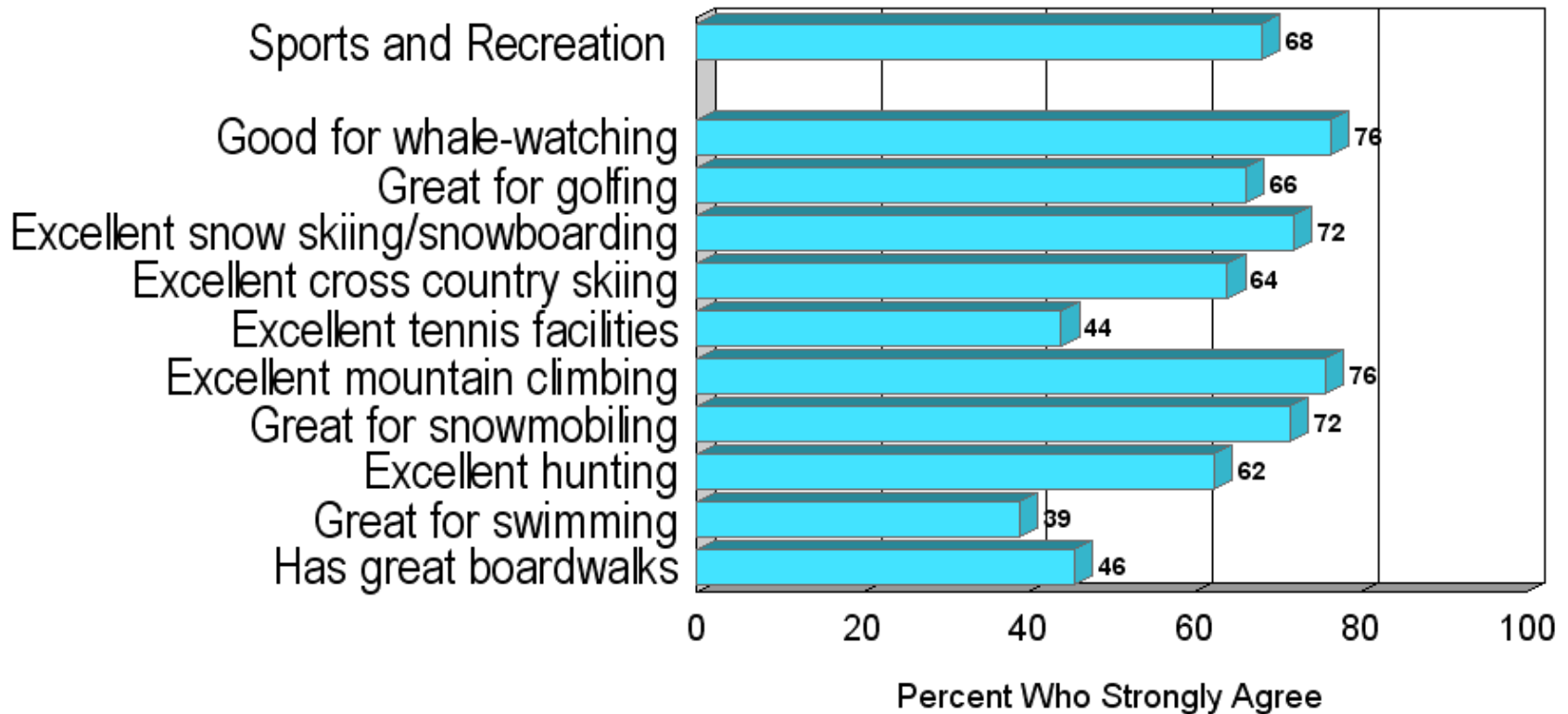
Base: Overnight Marketable Trips



# Sports and Recreation — 2004/2006 (Cont'd)



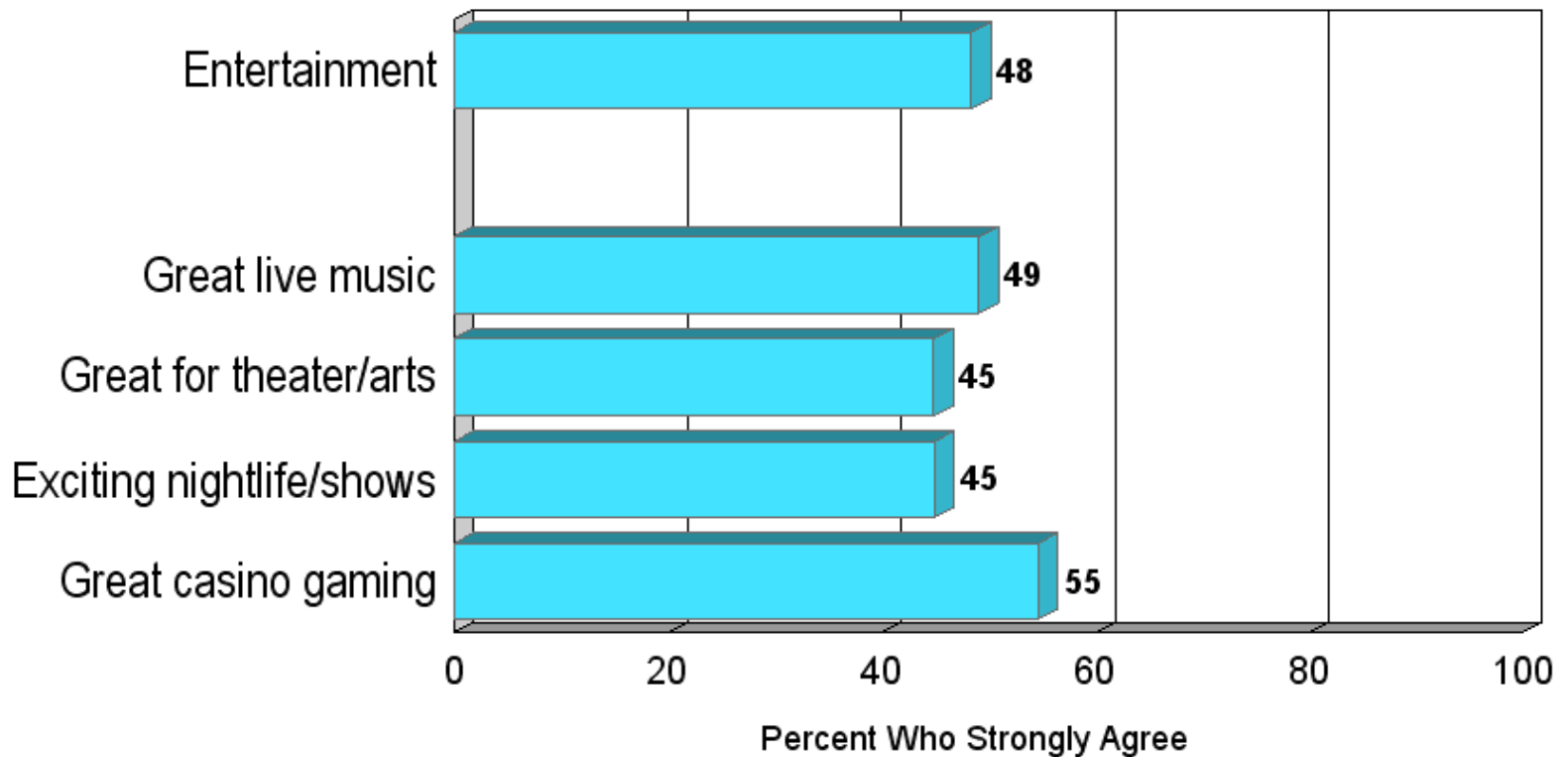
Base: Overnight Marketable Trips



# Entertainment — 2004/2006



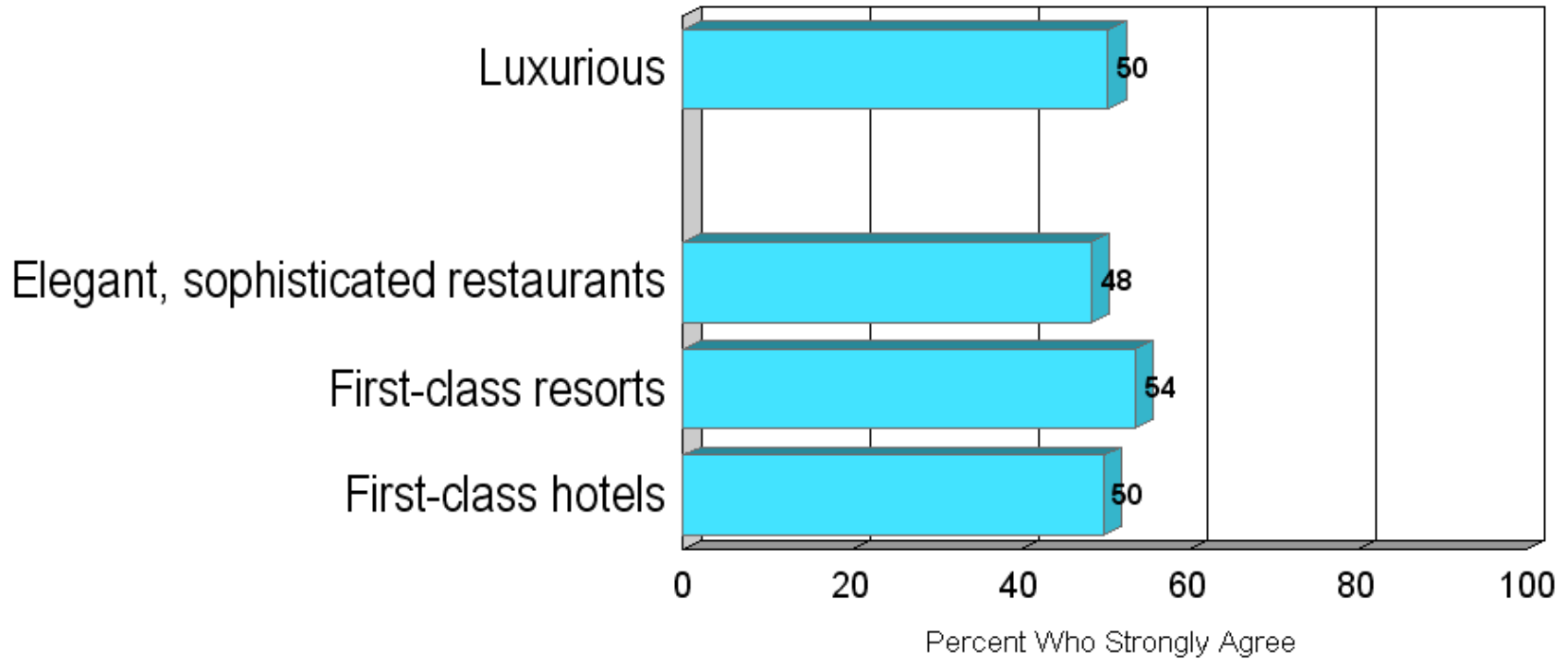
Base: Overnight Marketable Trips



# Luxurious — 2004/2006



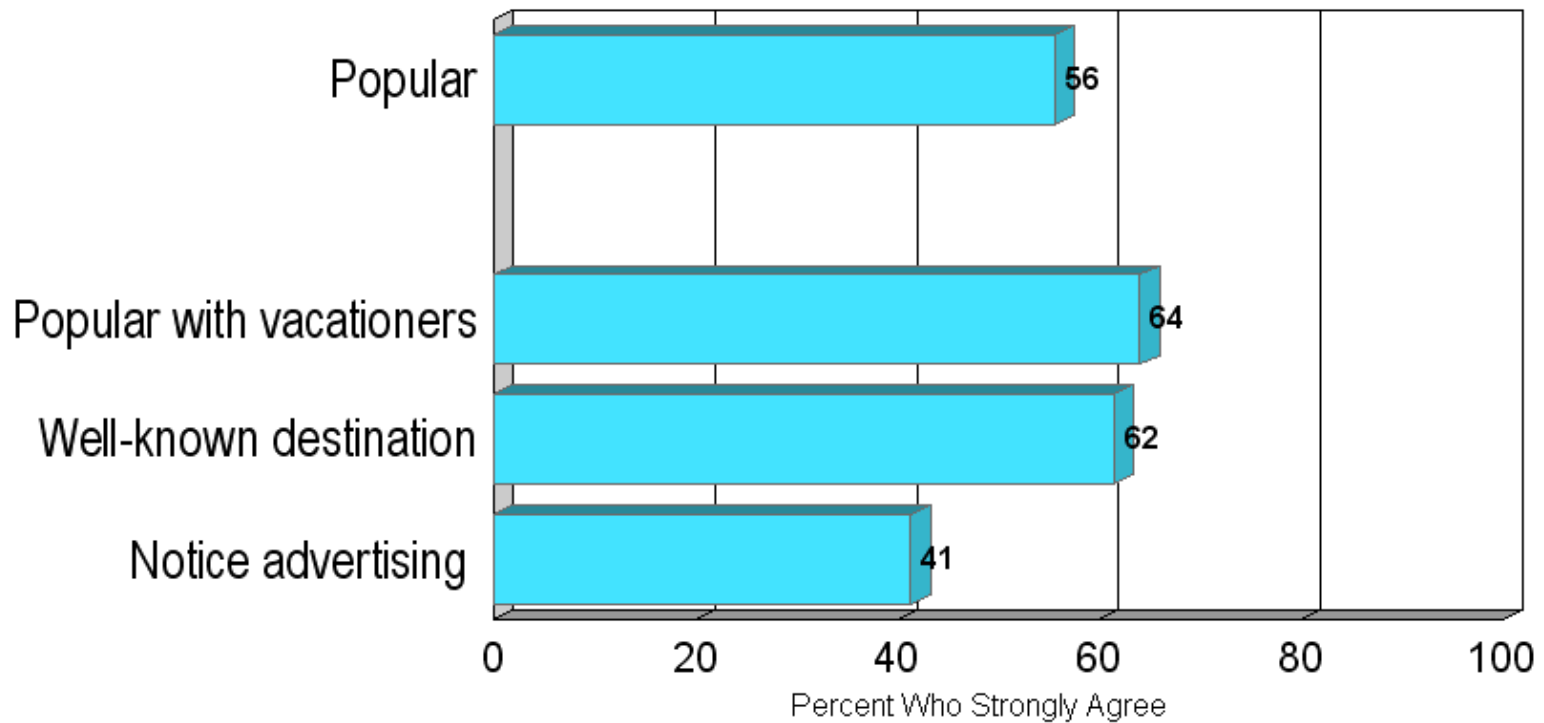
Base: Overnight Marketable Trips



# Popular — 2004/2006



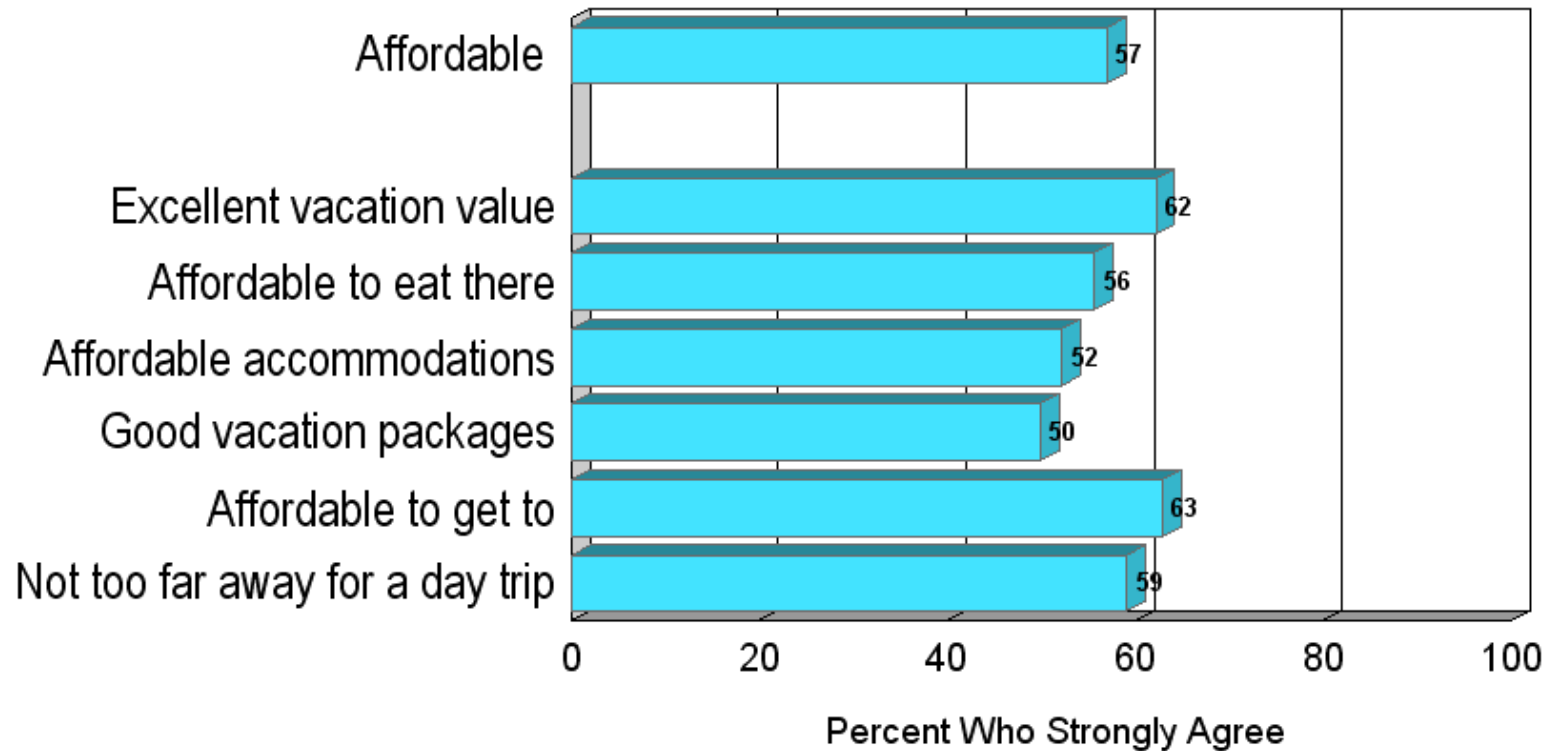
Base: Overnight Marketable Trips



# Affordable — 2004/2006



Base: Overnight Marketable Trips

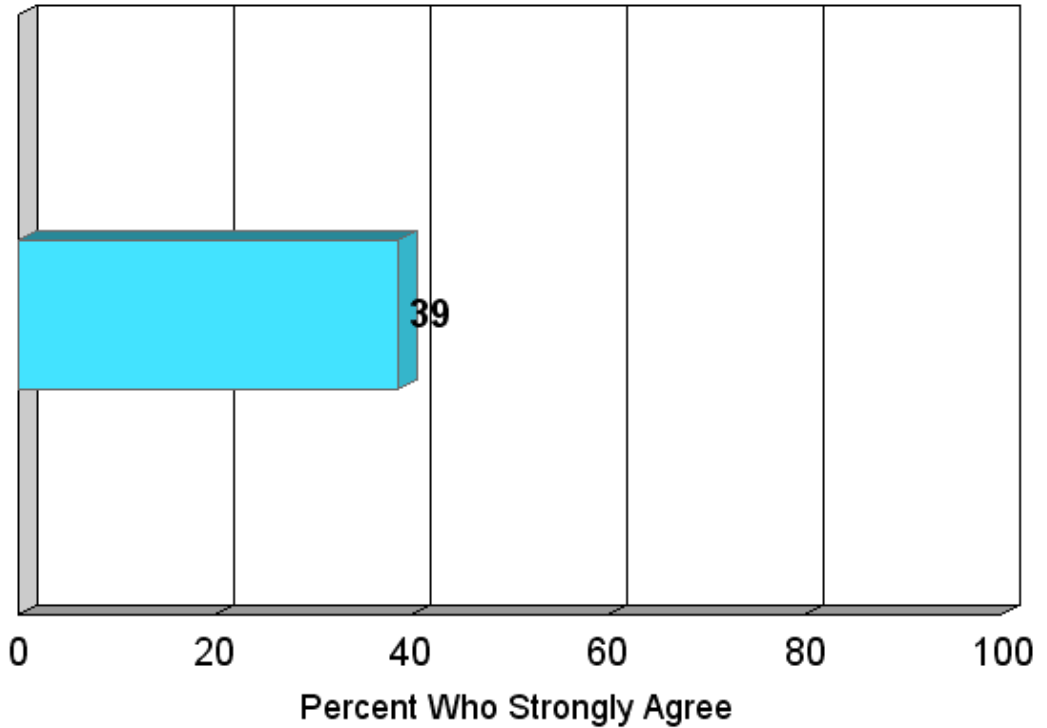


# Climate — 2004/2006



Base: Overnight Marketable Trips

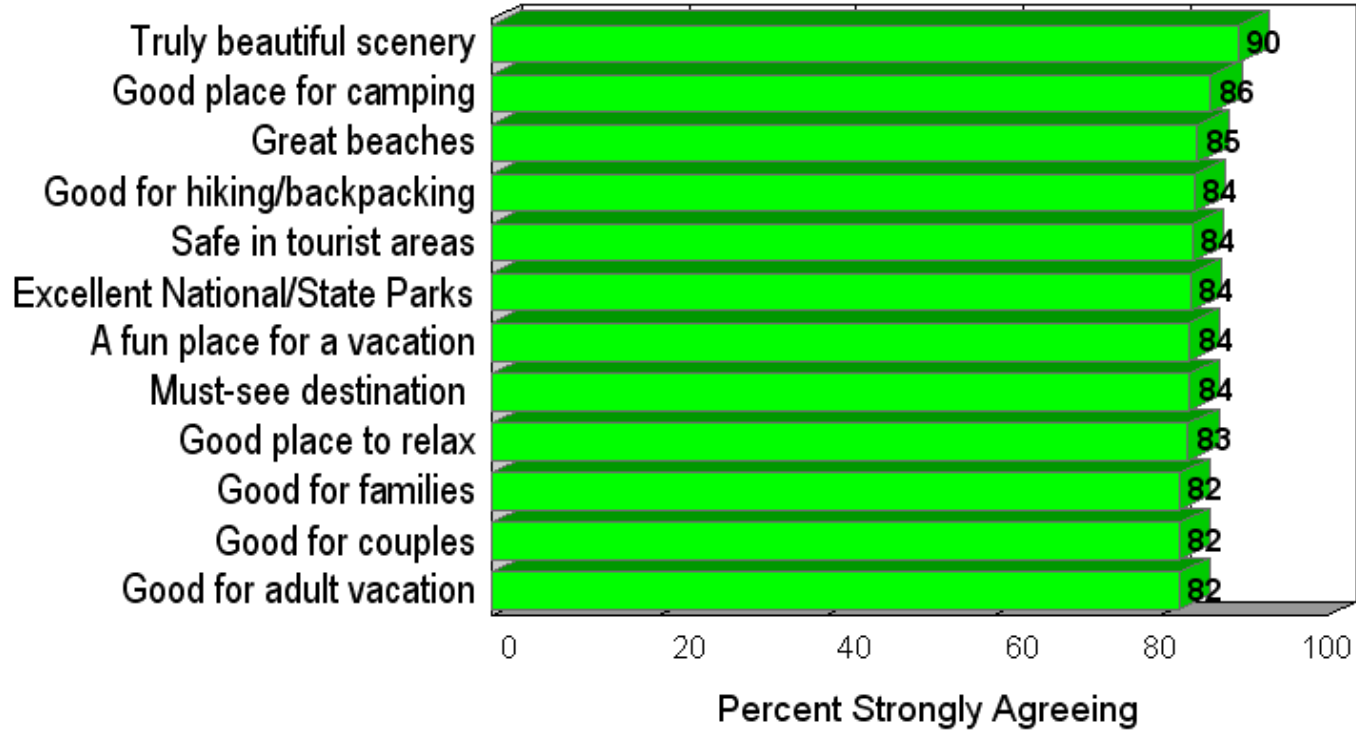
Excellent climate overall



# Product Strengths — 2004/2006



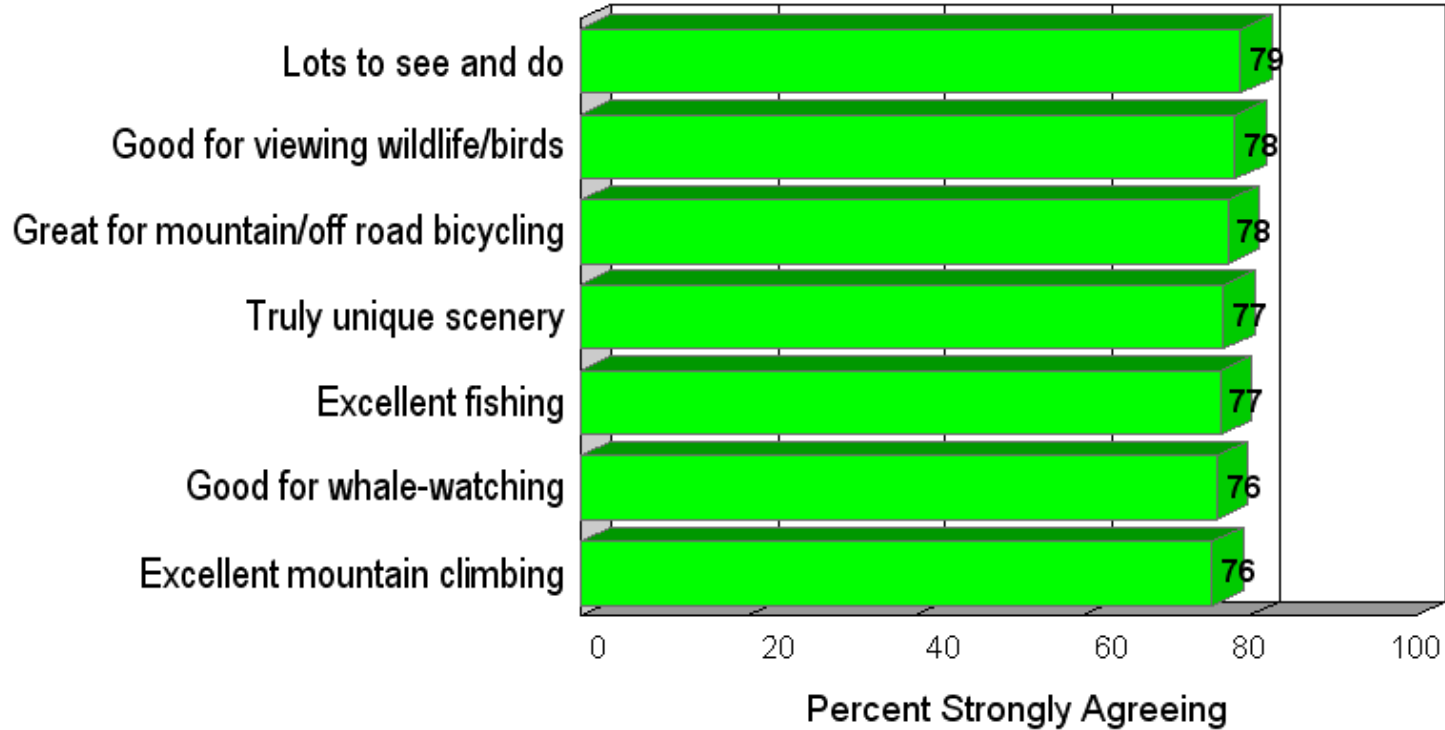
Base: Overnight Marketable Trips



# Product Strengths — 2004/2006 (Cont'd)



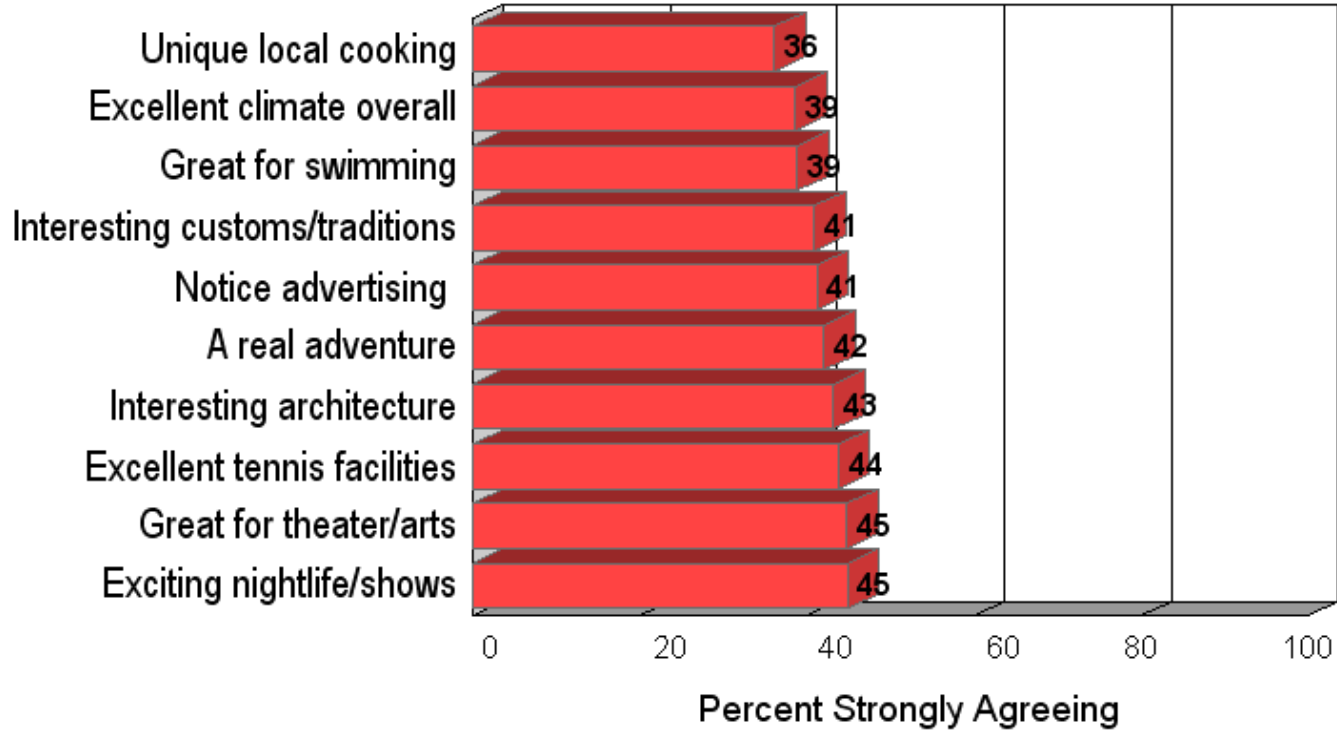
Base: Overnight Marketable Trips



# Product Weaknesses — 2004/2006



Base: Overnight Marketable Trips



# Product Weaknesses — 2004/2006 (Cont'd)



Base: Overnight Marketable Trips

