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TRAVEL OREGON

Oregon 2017
Regional Visitor Report
Willamette Valley Region

Longwoods **Travel**USA

Introduction

- ✓ Longwoods International began tracking American travelers in 1985, and has conducted large-scale syndicated visitor research quarterly since 1990.

- ✓ In 2007, our proprietary Longwoods **Travel USA®** program was migrated from mail to online, with the benefits of rapid turnaround, enhanced flexibility and interactivity, as well as greater respondent involvement.

- ✓ It is currently the largest ongoing study 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 2017 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 2016 and 2017 travel years, a representative sample of visitors to the Willamette Valley Region was identified through the **Travel USA®** survey:

➢ Respondents who visited Oregon were asked to identify which of the state's seven tourism regions they spent time in with the aid of a visual map.

➢ Of the survey sample of 7,919 overnight trips taken to Oregon in 2016 and 2017:

  ➢ 999 included a visit to the Willamette Valley Region

  ➢ Of those, 363 were **marketable trips***

*Caution should be used in interpreting Willamette Valley Region data due to low sample size

Map
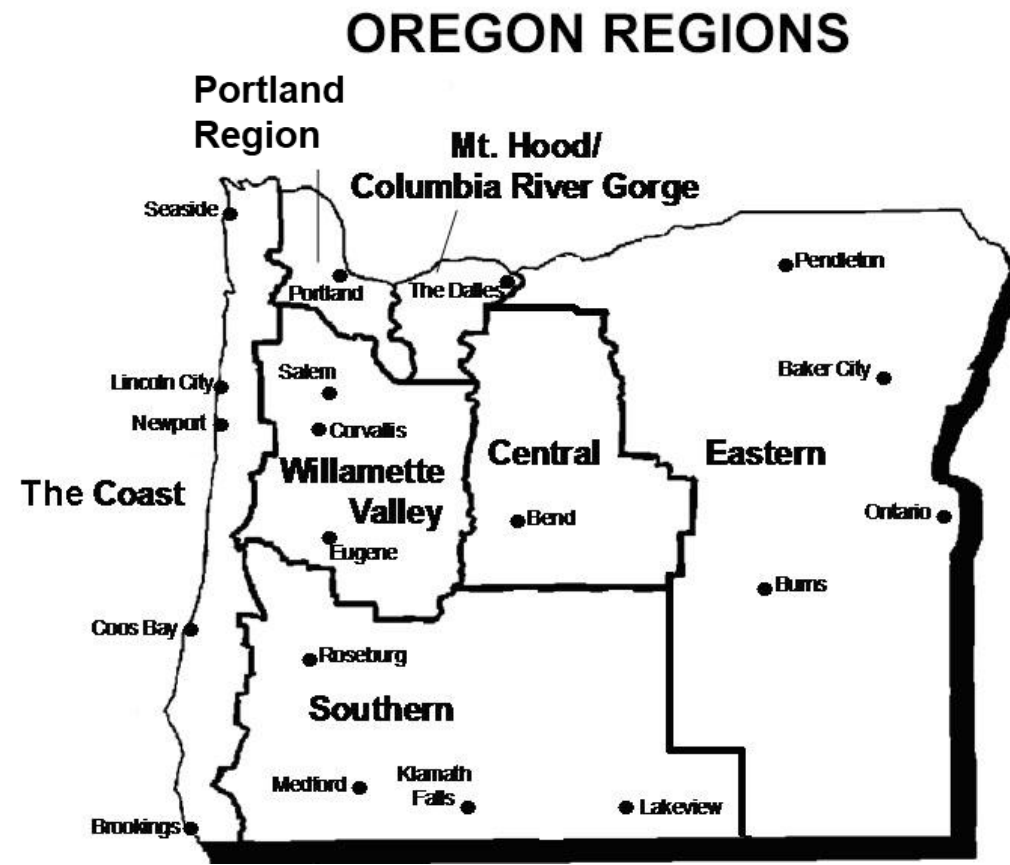
OREGON REGIONS

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 2017 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 2016 and 2017 unless otherwise indicated.

**Travel Market Size & Structure—
Willamette Valley Region 2017**

Size of the Willamette Valley Region's Overnight Travel Market

Total Overnight Trips to Oregon*= 34.1 Million

Spent Time in
Willamette Valley
Region
16%
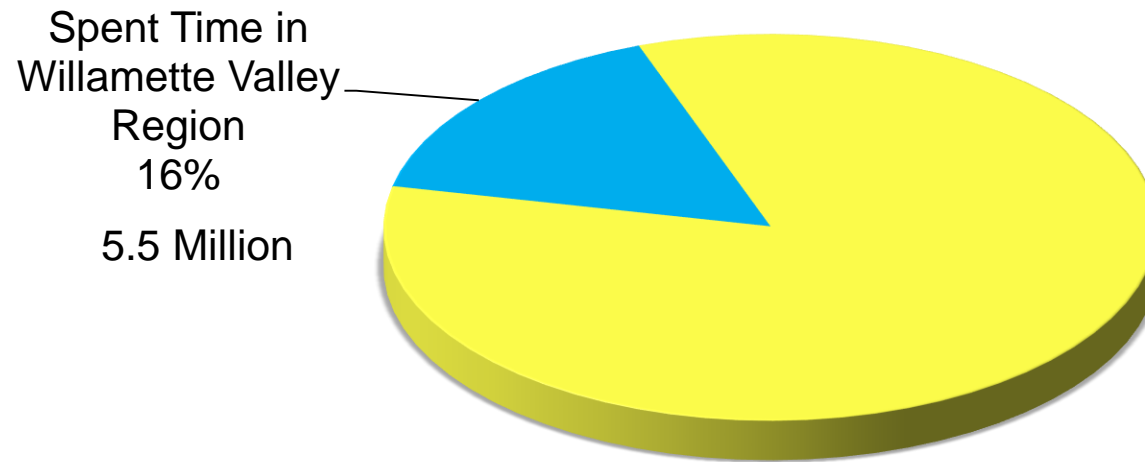
5.5 Million

*Includes both adults and children

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

Total Overnight Trips to the Willamette Valley Region = 5.5 Million

Adults
80%

4.4 Million

Children
20%
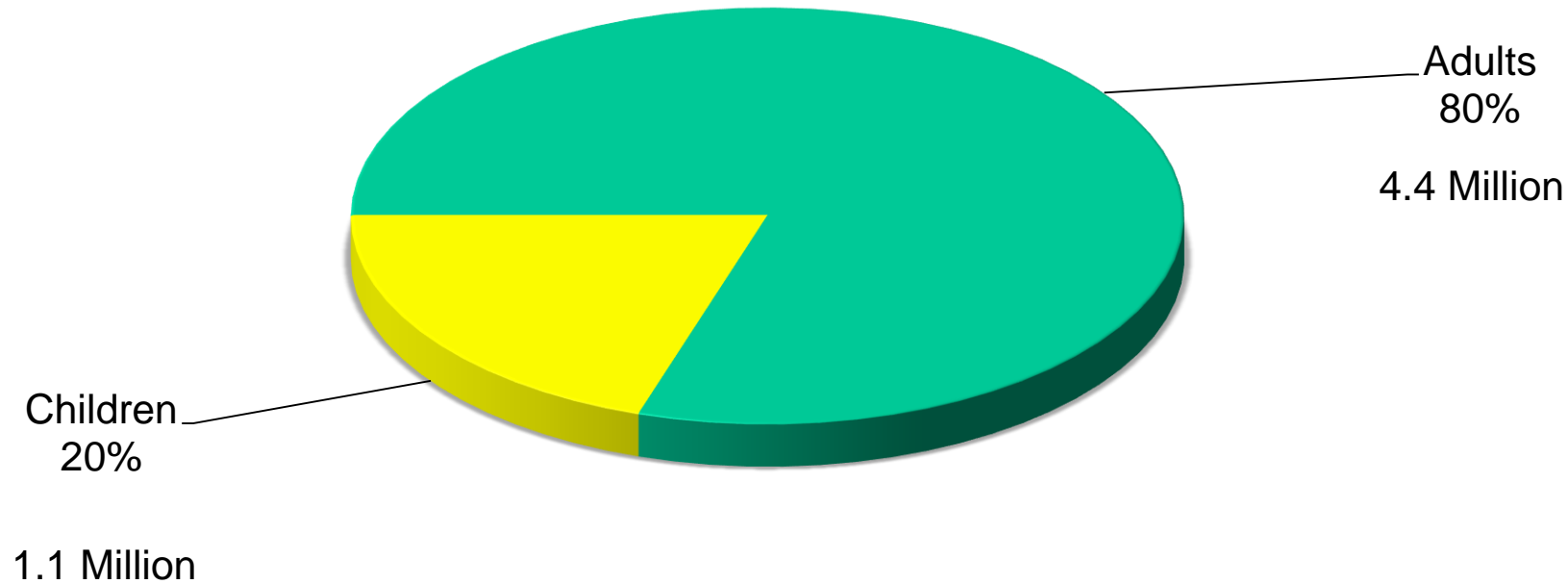
1.1 Million

The Willamette Valley Region's Overnight Travel Market — by Main Trip Purpose

Total Overnight Trips to the Willamette Valley Region = 5.5 Million

Visiting Friends/Relatives
50%

2.8 Million

Marketable*
42%

2.3 Million

Business
8%
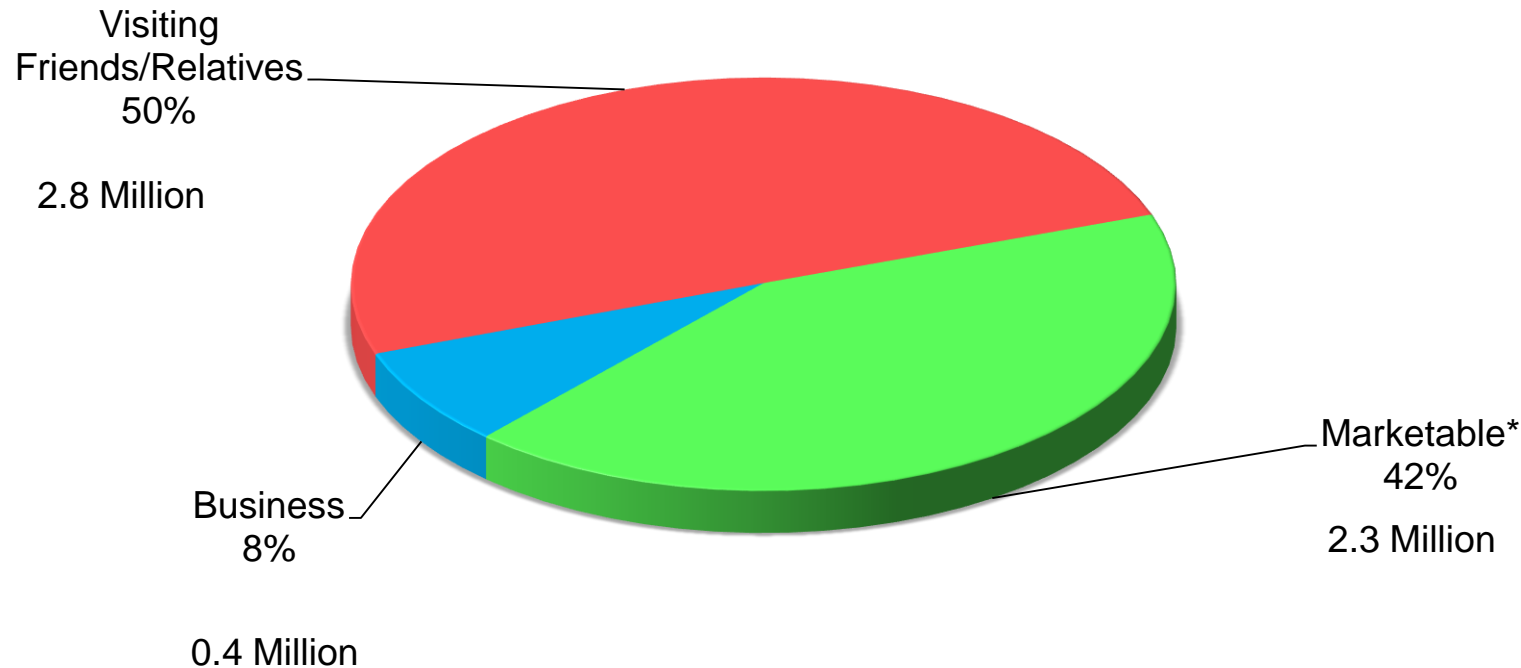
0.4 Million

*Marketable includes Business-Leisure

The Willamette Valley Region vs. Oregon State —by Trip Purpose

Base: Overnight Person-Trips

Visits to Friends and Relatives
- Willamette Valley Region: 50
- Oregon: 41

Marketable Trips
- Willamette Valley Region: 42
- Oregon: 51

Business
- Willamette Valley Region: 8
- Oregon: 8

Percent

■ Willamette Valley Region ■ Oregon
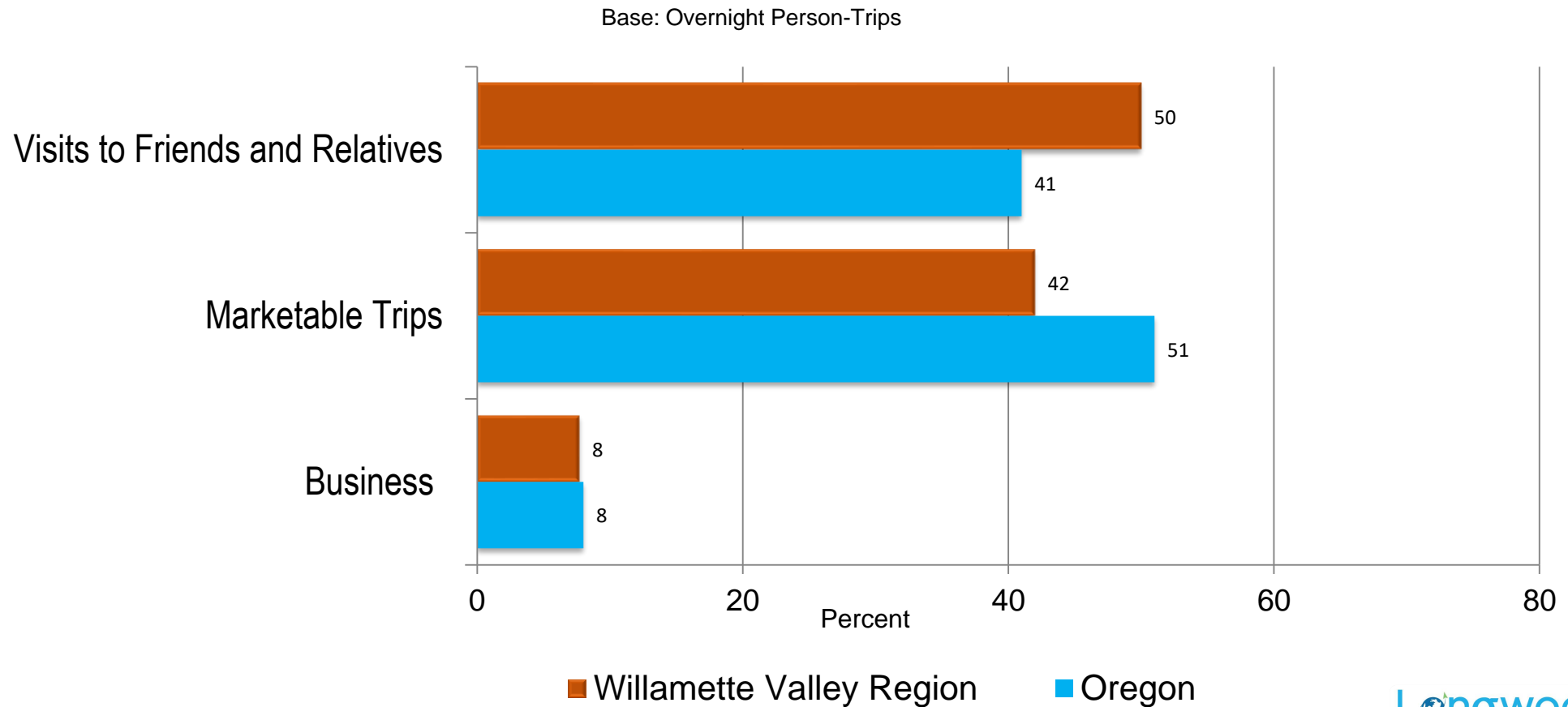
*Marketable includes Business-Leisure

2017 Overnight Expenditures — by Sector

2017 Willamette Valley Region Spending = $770 Million

Lodging
32%

$245 Million

Restaurant Food & Beverage…

$214 Million

Retail
19%

$145 Million

Transportation
13%
$102 Million

Recreation
8%

$64 Million

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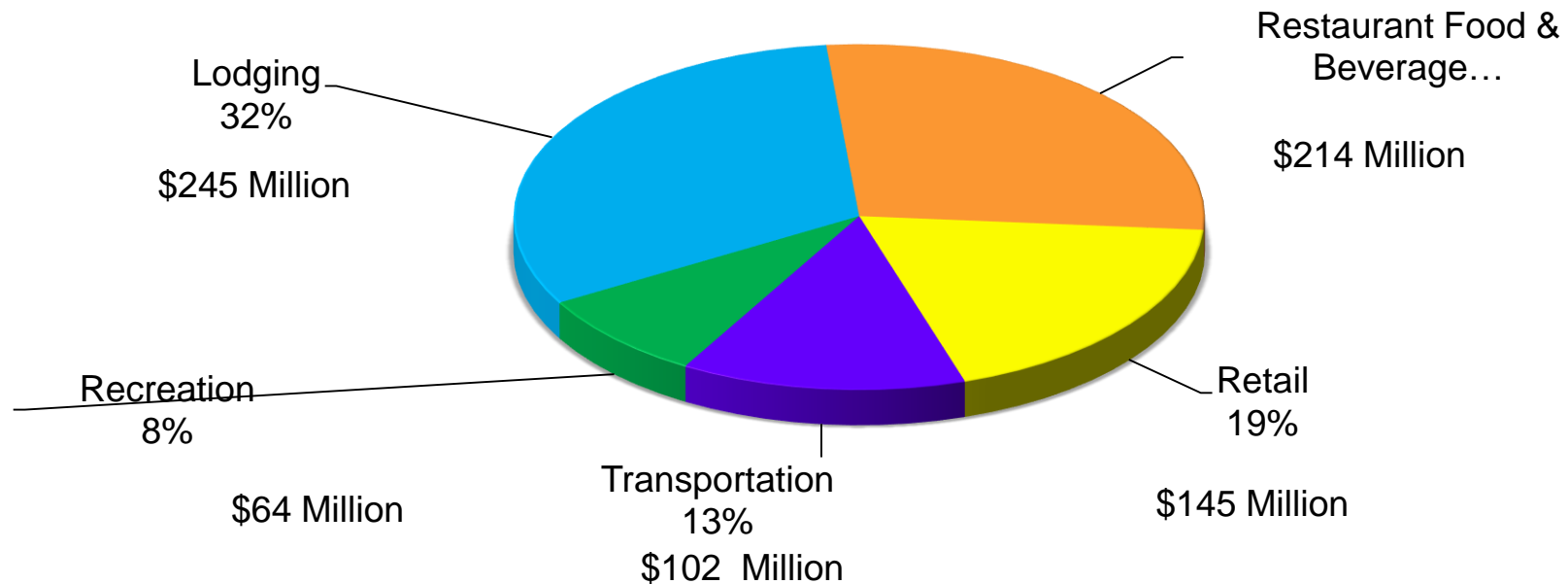
Average Per Person Expenditures on Overnight Trips — By Sector

Base: Total Overnight Person-Trips to Willamette Valley Region

Bar chart (Dollars) showing average per person expenditures by sector:
- Lodging: $35
- Restaurant Food & Beverage: $31
- Retail Purchases: $21
- Transportation at Destination: $15
- Recreation/Sightseeing/Entertainment: $9
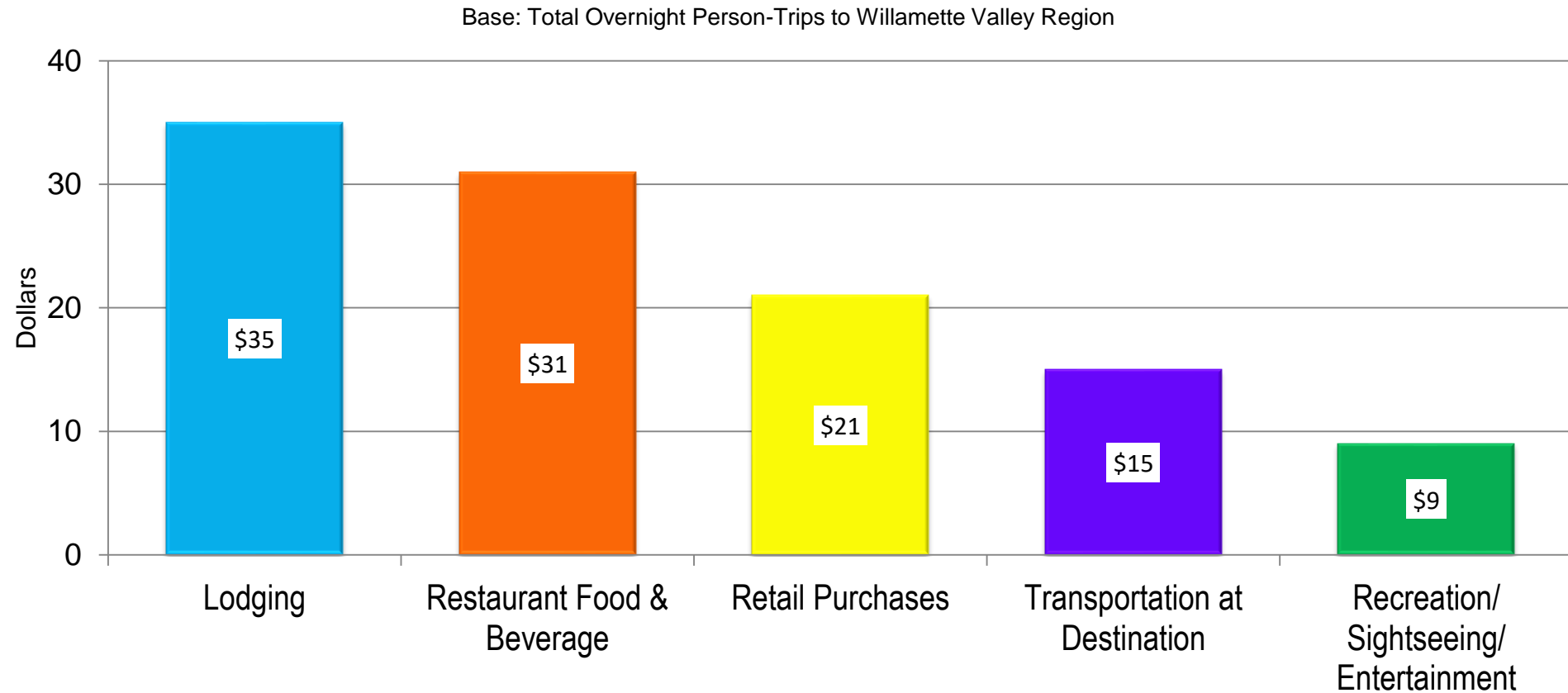
Average Per Person Expenditures on Overnight Marketable Trips — By Sector

Base: Overnight Marketable Trips to Willamette Valley Region

Sector	Dollars
Lodging	$41
Restaurant Food & Beverage	$29
Retail Purchases	$17
Recreation/Sightseeing/Entertainment	$14
Transportation at Destination	$13
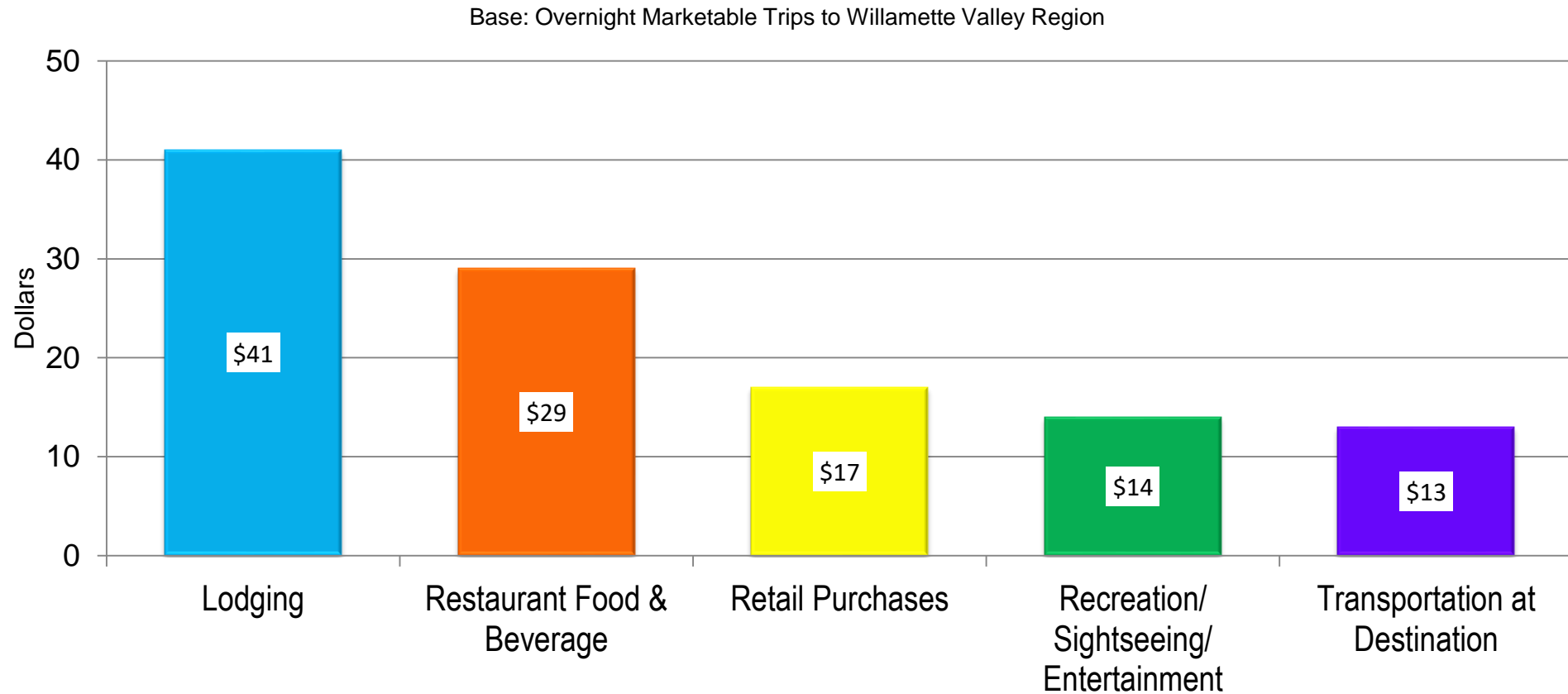
Marketable Trip Characteristics and Visitor Profile- 2016/2017

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

Base: Overnight Marketable Person-Trips

Purpose	Willamette Valley Region	Oregon
Touring	27	24
Outdoors	22	23
Special event	21	17
City trip	13	11
Resort	7	11
Casino	5	6
Theme park	2	2
Cruise	2	2
Skiing/snowboarding	1	2

Percent

■ Willamette Valley Region ■ Oregon

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State Origin Of Trip

Base: Overnight Marketable Person-Trips to Willamette Valley Region

State	Percent
Oregon	48
Califronai	19
Washington	14
Idaho	2
Florida	2

Percent

DMA Origin Of Trip

Base: Overnight Marketable Person-Trips to Willamette Valley Region

DMA	Percent
Portland, OR	28
Eugene, OR	16
Seattle-Tacoma, WA	8
San Francisco-Oakland-San Jose, CA	8
Los Angeles, CA	5
Medford-Klamath Falls, OR/CA	4
Yakima, WA	3
Sacramento-Stockton-Modesto, CA	3

Other Oregon Regions Visited on Willamette Valley Region Trip

Base: Overnight Person-Trips

Region	Percent
Portland Region	29.2
Coast Region	27.5
Mt Hood-Columbia River Gorge Region	14.7
Southern Region	10.8
Central Region	10.5
Eastern Region	3.1

Percent

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Season of Trip

Base: Overnight Marketable Person-Trips

January-March: Willamette Valley Region 20, Oregon 21
April-June: Willamette Valley Region 26, Oregon 26
July-September: Willamette Valley Region 35, Oregon 32
October-December: Willamette Valley Region 19, Oregon 21

Percent
0 — 10 — 20 — 30 — 40

■ Willamette Valley Region ■ Oregon

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Past Visitation to Oregon*

Base: Overnight Marketable Person-Trips

	Percent
Ever — Willamette Valley Region	76
Ever — Oregon	87
Past 12 Months* — Willamette Valley Region	56
Past 12 Months* — Oregon	69

* Question wording changed in 2017

■ Willamette Valley Region ■ Oregon

Length of Trip Planning

Base: Overnight Marketable Person-Trips

Planning Length	Willamette Valley Region	Oregon
More than 1 year in advance	2	4
6-12 months	16	17
3-5 months	21	19
2 months	18	15
1 month or less	29	34
Did not plan anything in advance	14	11

Percent

■ Willamette Valley Region ■ Oregon

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Trip Planning Information Sources

Base: Overnight Marketable Person-Trips

Source	Willamette Valley Region	Oregon
Hotel or resort	22	16
Destination websites	20	18
Advice from relatives or friends	20	16
Online travel agencies	20	19
Social Media	15	15
Travel guide/other books	11	10
Lodging sharing websites	11	8
Travel company websites	10	10
Airline/commercial carrier	9	6

Percent

■ Willamette Valley Region ■ Oregon

Trip Planning Information Sources (Cont'd)

Base: Overnight Marketable Person-Trips

Source	Willamette Valley Region	Oregon
Auto club/AAA	6	8
Visitors' bureau/gov tourism office	6	5
Magazine articles/ad	5	3
800/888 number	2	3
Travel Agent/Company	2	3
Newspaper articles/ad	2	2

Percent

■ Willamette Valley Region ■ Oregon

Method of Booking

Base: Overnight Marketable Person-Trips

Chart data (Willamette Valley Region / Oregon):

Method	Willamette Valley Region	Oregon
Hotel or resort	25	21
Online travel agencies	21	20
Airline/commercial carrier	10	7
Lodging sharing websites	8	7
Travel company websites	8	8
800/888 number	7	6
Destination websites	6	6
Auto club/AAA	3	4
Travel Agent/Company	2	4
Visitors' bureau/gov tourism office	1	2

Percent

■ Willamette Valley Region ■ Oregon

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Devices Used for Trip Planning

Base: Overnight Marketable Person-Trips

Willamette Valley Region / Oregon

Device	Willamette Valley Region	Oregon
Used Any Device (net)	88	89
Laptop	47	47
Desktop/Home computer	42	43
Smartphone	26	33
Tablet	17	16

Percent

25

Devices Used During Trip

Base: Overnight Marketable Person-Trips

Used Any Device (net)
- Willamette Valley Region: 83
- Oregon: 84

Smartphone
- Willamette Valley Region: 69
- Oregon: 69

Tablet
- Willamette Valley Region: 33
- Oregon: 30

Laptop
- Willamette Valley Region: 31
- Oregon: 28

Percent

■ Willamette Valley Region ■ Oregon

Total Nights Away on Trip

Base: Overnight Marketable Person-Trips

Total Nights	Willamette Valley Region	Oregon
1 night	28	24
2 nights	25	26
3-4 nights	17	24
5-6 nights	15	10
7-13 nights	8	11
14 + nights	7	5

Percent

■ Willamette Valley Region ■ Oregon

Average Willamette Valley Region
4.3 nights

Average Oregon
4.1 nights

Number of Nights Spent in the Willamette Valley Region

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

Number of Nights	Percent
1 night	43
2 nights	32
3-4 nights	16
5-6 nights	4
7 + nights	5

Percent

Average Nights Spent in Willamette Valley Region = 2.3

Size of Travel Party

Base: Overnight Marketable Person-Trips

Average Number of People

- Willamette Valley Region: Adults 2.3, Children 0.5, **Total = 2.8**
- Oregon: Adults 2.3, Children 0.6, **Total = 2.9**

■ Adults   ■ Children

Composition of Immediate Travel Party*

Base: Overnight Marketable Person-Trips

Category	Willamette Valley Region	Oregon
Spouse/partner	75	71
Child(ren)	20	29
Friend(s)	18	18
Just myself/traveled alone	12	14
Other relative(s)	6	10
Parent(s)	6	10

Percent

■ Willamette Valley Region   ■ Oregon

*Question added in 2017; reflects 2017 data only

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Transportation

Base: Overnight Marketable Person-Trips

Percent

Willamette Valley Region   Oregon

Accommodations

Base: Overnight Marketable Person-Trips

Accommodation	Willamette Valley Region	Oregon
Other hotel	27	23
Motel	27	26
Resort hotel	18	17
Campground/trailer park/RV park	13	15
Home of friends/relatives	13	9
Other	8	5
Bed & Breakfast	6	5
Rented home/condo/apartment	5	7
Rented cottage/cabin	5	4
Country Inn/Lodge	3	3
Boat/cruise ship	1	2

Percent

■ Willamette Valley Region ■ Oregon

Activities and Experiences

Base: Overnight Marketable Person-Trips

Activity	Willamette Valley Region	Oregon
Shopping	37	31
National/State Park	28	25
Landmark/Historic Site	27	24
Beach/Waterfront	22	30
Hiking/Backpacking	21	20
Fine Dining	18	20
Museum	18	15
Camping	15	15
Brewery	14	14
Swimming	14	15
Winery	14	8

Percent

■ Willamette Valley Region ■ Oregon

Activities and Experiences (Cont'd)

Base: Overnight Marketable Person-Trips

Activity	Willamette Valley Region	Oregon
Bar/Nightclub	10	12
Fair/Exhibition/Festival	9	7
Casino	8	12
Art Gallery	7	6
Biking	6	5
Boating/Sailing	6	4
Spa	5	4
Pro/College Sports	5	3
Fishing	4	7
Zoo	4	6
Educational Seminar	4	2

Percent

■ Willamette Valley Region ■ Oregon

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Activities and Experiences (Cont'd)

Base: Overnight Marketable Person-Trips

Activity	Willamette Valley Region	Oregon
Adult Amateur Sports Event	3	2
Rock/Pop Concert	3	3
Theater	3	5
Theme Park	3	3
Dance	3	4
Visited American Indian Community	2	2
Glamping	2	3
Mountain Climbing	2	3
Golf	2	4
Youth/Teenager Sports Event	2	3
Kids Sports Event	2	2

Percent

■ Willamette Valley Region ■ Oregon

Activities and Experiences (Cont'd)

Base: Overnight Marketable Person-Trips

Activity	Willamette Valley Region	Oregon
Birding	1	4
Opera	1	1
Trade Show	1	1
Rafting	1	2
Rodeo	1	1
Skiing	1	3
Waterpark	1	2
Hunting	1	1
Symphony	1	1
Motorcycle Touring	1	1

Percent

■ Willamette Valley Region ■ Oregon

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Activities of Special Interest

Base: Overnight Marketable Person-Trips

Activity	Willamette Valley Region	Oregon
Historic places	34	31
Cultural activities/attractions	24	22
Winery tours/Wine tasting	16	9
Exceptional culinary experiences	16	12
Brewery Tours/Beer Tasting	11	12
Eco-Tourism	4	7
Agritourism	3	2
Marijuana Tourism*	3	6
Wedding	2	2
Traveling with grandchildren	2	4
Religious Travel	2	3
Medical Tourism	1	1

Percent

■ Willamette Valley Region   ■ Oregon

*Added in 2017, reflects 2017 data only

Online Social Media Use by Travelers

Base: Overnight Marketable Person-Trips

Chart data (Percent):

Activity	Willamette Valley Region	Oregon
Used any social media for travel	75	74
Read travel reviews	38	33
Posted travel photos/video online	36	37
Looked at travel photos/video online	35	30
Accessed travel news/events/deals/promotions	21	19
Read a travel blog	16	16
Contributed travel reviews	16	13

Online Social Media Use by Travelers (Cont'd)

Base: Overnight Marketable Person-Trips

Activity	Willamette Valley Region	Oregon
Used any social media for travel	75	74
Connected with others interested in travel	13	13
Gave travel advice	9	7
"Followed" a destination/attraction	8	9
Got travel advice	7	11
Subscribed to a travel e-newsletter	7	6
Tweeted about a trip	5	6
Blogged about a trip	4	4

Percent

■ Willamette Valley Region   ■ Oregon

Organization Membership

Base: Overnight Marketable Person-Trips

Chart showing Organization Membership by percent.

Organization	Willamette Valley Region	Oregon
AAA	40	43
AARP	28	27
National Motor Club	1	3

Percent

■ Willamette Valley Region ■ Oregon

Gender

Base: Overnight Marketable Person-Trips

Percent

■ Willamette Valley Region   ■ Oregon

Age

Base: Overnight Marketable Person-Trips

Average Willamette Valley Region = 48.7

Average Oregon = 47.7

Percent

■ Willamette Valley Region ■ Oregon

Marital Status

Base: Overnight Marketable Person-Trips

Legend: Willamette Valley Region, Oregon

Married/with partner: 65 (Willamette Valley Region), 65 (Oregon)
Single/never married: 20 (Willamette Valley Region), 23 (Oregon)
Divorced/widowed/ separated: 15 (Willamette Valley Region), 12 (Oregon)

Percent

Household Size

Base: Overnight Marketable Person-Trips

Household size chart comparing Willamette Valley Region and Oregon:

Household Size	Willamette Valley Region	Oregon
1 member	19	22
2 members	43	42
3 members	12	14
4 members	15	13
5+ members	11	9

Percent

■ Willamette Valley Region ■ Oregon

Children in Household

Base: Overnight Marketable Person-Trips

Category	Willamette Valley Region	Oregon
No children under 18	61	65
Any child between 13-17	21	18
Any child between 6-12	16	15
Any child under 6	13	13

Percent

■ Willamette Valley Region ■ Oregon

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Education

Base: Overnight Marketable Person-Trips

Education	Willamette Valley Region	Oregon
Post-graduate	22	21
College graduate	34	41
Some college	31	22
High school or less	12	15
Other	1	1

Percent

■ Willamette Valley Region ■ Oregon

Employment

Base: Overnight Marketable Person-Trips

Full time/ self-employed
- Willamette Valley Region: 41
- Oregon: 47

Part time
- Willamette Valley Region: 11
- Oregon: 9

Not employed/retired/ other
- Willamette Valley Region: 48
- Oregon: 44

Percent

■ Willamette Valley Region ■ Oregon

Household Income

Base: Overnight Marketable Person-Trips

Average Willamette Valley Region= $64,560

Average Oregon = $66,410

Willamette Valley Region   **Oregon**

Percent

Income	Willamette Valley Region	Oregon
$150K+	4	5
$100-$149.9K	15	15
$75-$99.9K	15	17
$50-$74.9K	22	23
<$49.9K	44	40

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Race

Base: Overnight Marketable Person-Trips

Chart showing race percentages comparing Willamette Valley Region and Oregon:
- White: Willamette Valley Region 93, Oregon 88
- African-American: Willamette Valley Region <1, Oregon 2
- Other: Willamette Valley Region 7, Oregon 10

Legend: ■ Willamette Valley Region ■ Oregon

X-axis: Percent

Hispanic Background

Base: Overnight Marketable Person-Trips

No
- Willamette Valley Region: 94
- Oregon: 93

Yes
- Willamette Valley Region: 6
- Oregon: 7

Percent

■ Willamette Valley Region   ■ Oregon

Appendix:
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:** Include all trips where the main purpose was one of the following:

➢ Visiting friends/relatives

Marketable Trips:
Include all leisure trips, with the exception of visits to 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

➢ **Business Trips:**

➢ 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.

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