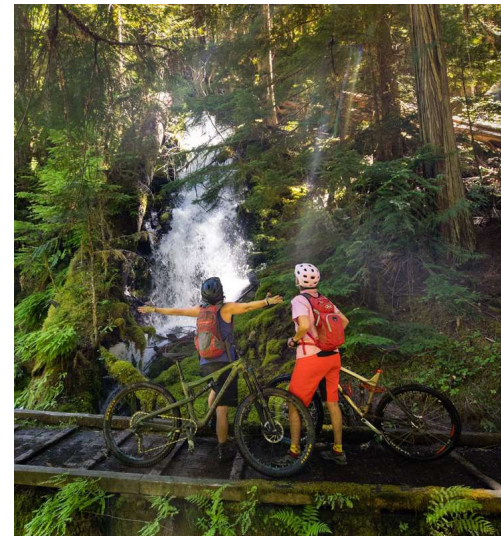


# 9 Key Learnings About Oregon Visitors and What It Means for the Future



Destination  Analysts



A photograph of two cyclists riding on a paved road that curves to the right. The road is bordered by a white wooden fence. In the background, there are tall evergreen trees and a hillside with some buildings. The scene is captured in a soft, slightly hazy light, possibly during the golden hour. The text is overlaid on the left side of the image.

**Destination Analysts is a full-  
service market research firm  
that provides destinations and  
the greater travel, tourism, and  
hospitality industries with  
deep and actionable insights  
to guide marketing, branding,  
and management strategies.**

**WHO WE ARE**



Conducted deep research into  
Oregon visitors, including  
demographics, behaviors,  
motivators, and perceptions.

**WHAT WE DID**



**Understand key  
learnings about Oregon  
visitors and how it can  
guide future destination  
marketing and  
management efforts.**

**WHAT YOU'LL TAKE AWAY**

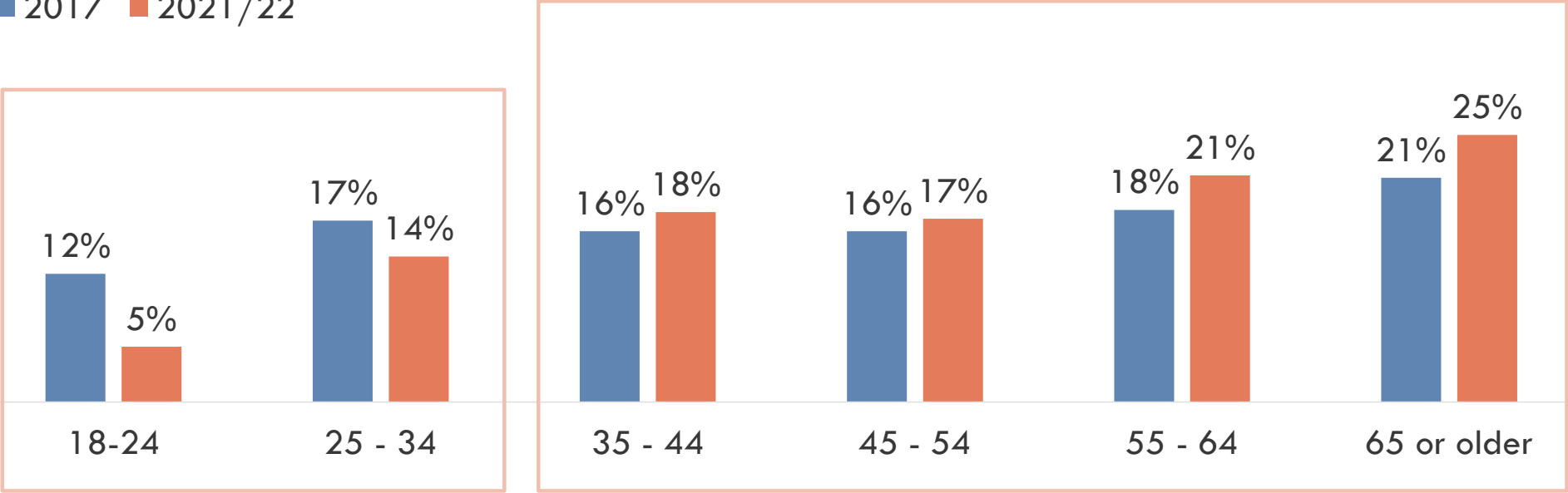
# LEARNING 1

**Visitor demographics are changing.**



# OREGON VISITOR AGE BY YEAR

■ 2017 ■ 2021/22

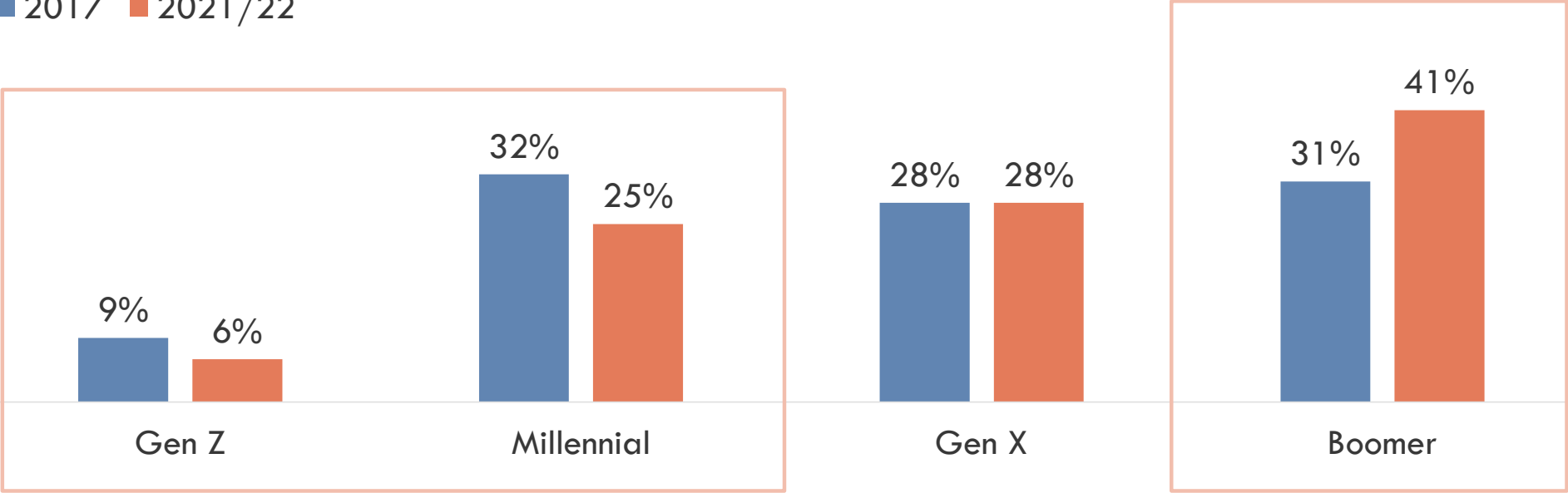


2017 – 47.7

2021/22 – 51.1

# NATIONAL TRAVELER VS OREGON VISITOR AGE

■ 2017 ■ 2021/22

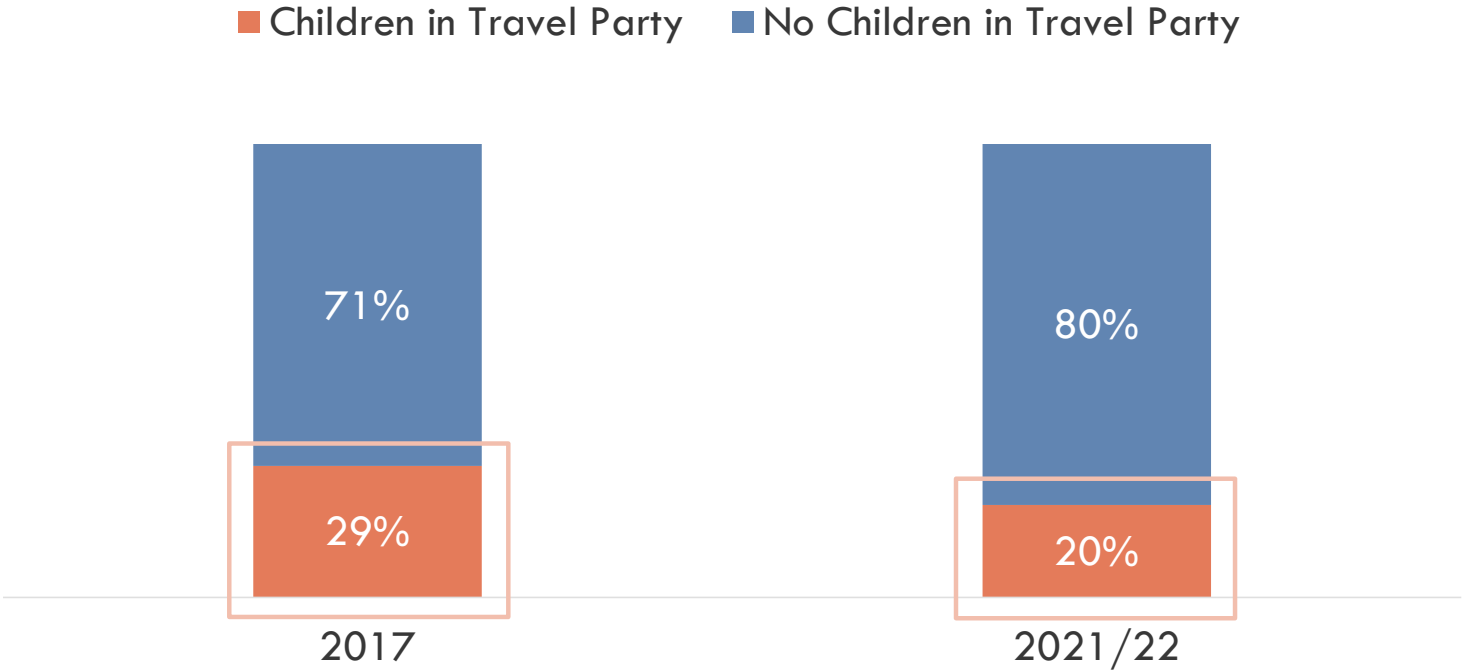


National – 47.2

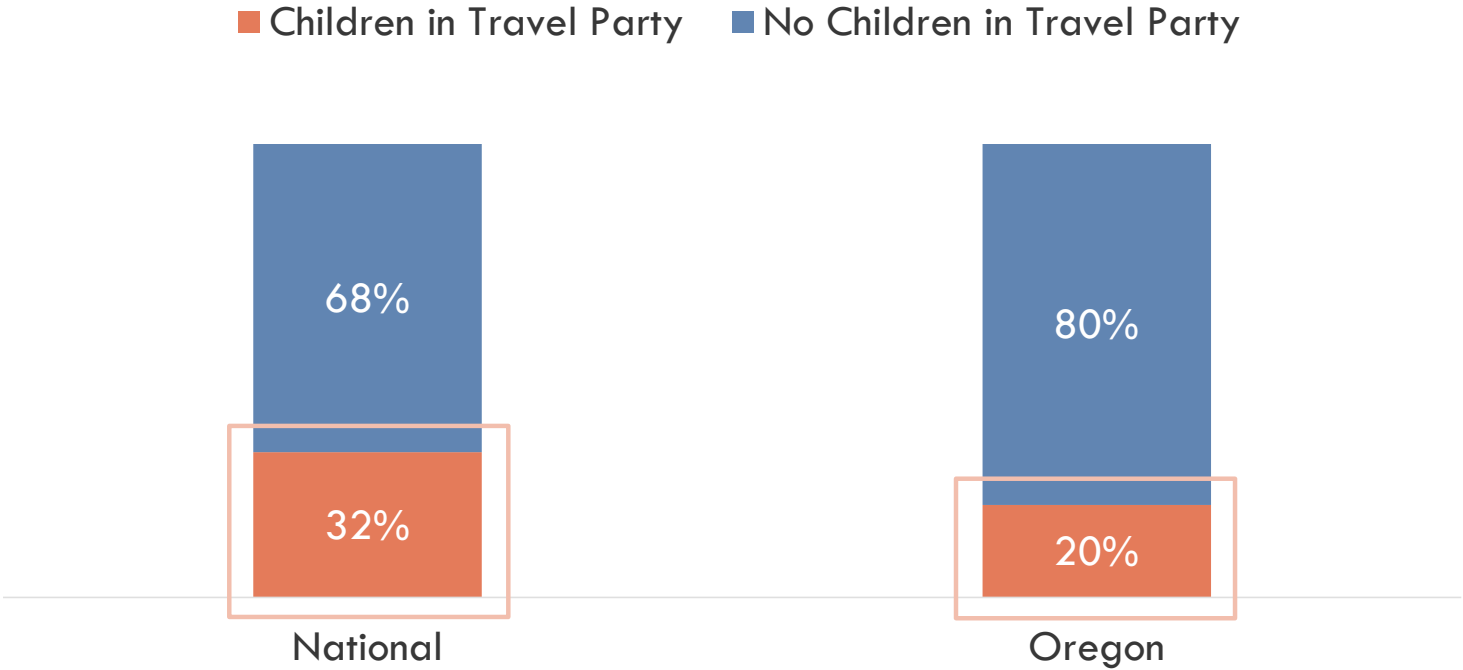
Oregon – 51.1

# OREGON VISITOR CHILDREN IN TRAVEL PARTY BY YEAR

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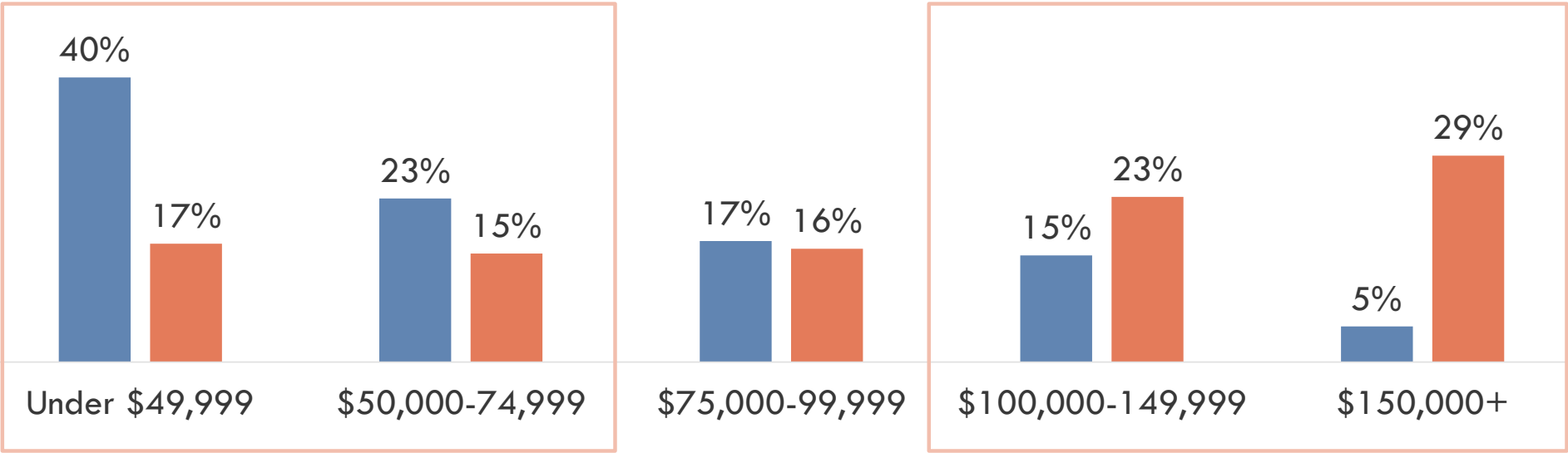


# NATIONAL TRAVELER VS OREGON VISITOR CHILDREN IN PARTY



# OREGON VISITOR HOUSEHOLD INCOME

■ 2017 ■ 2021/22

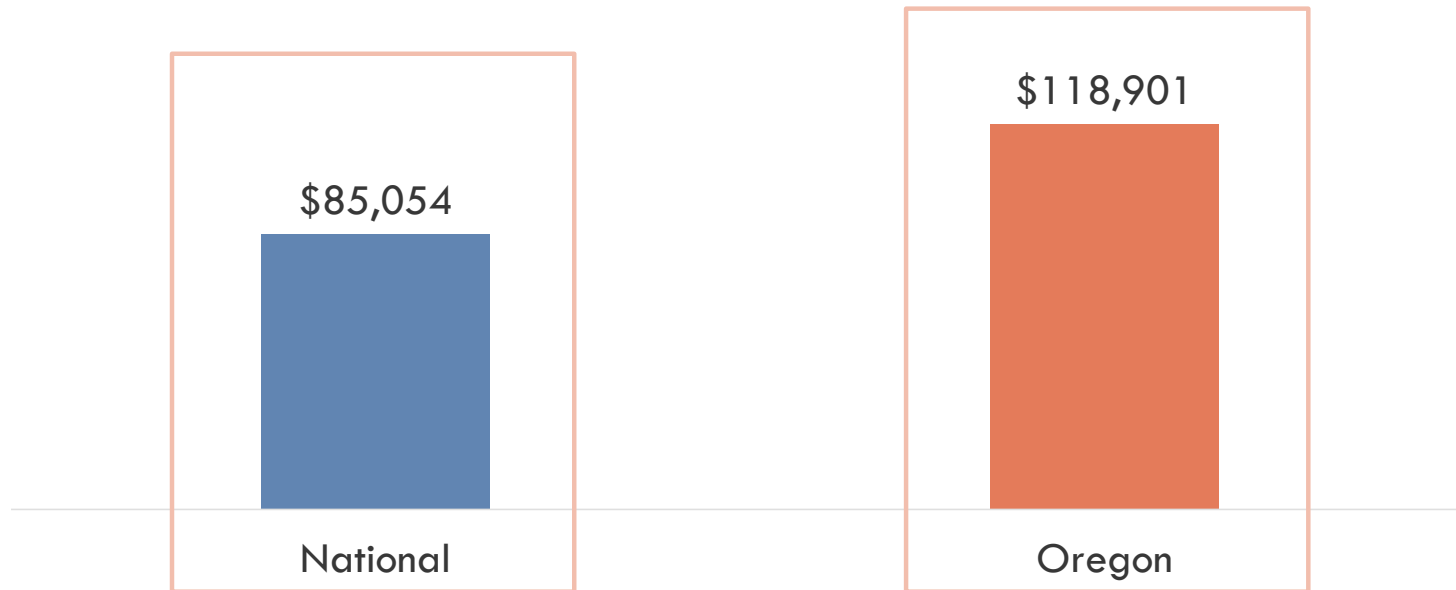


2017 – \$66,410

2021/22 – \$118,901

## NATIONAL TRAVELER VS OREGON VISITOR HOUSEHOLD INCOME

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# TAKE AWAY

**The travel marketplace is continuing to evolve post-pandemic.**

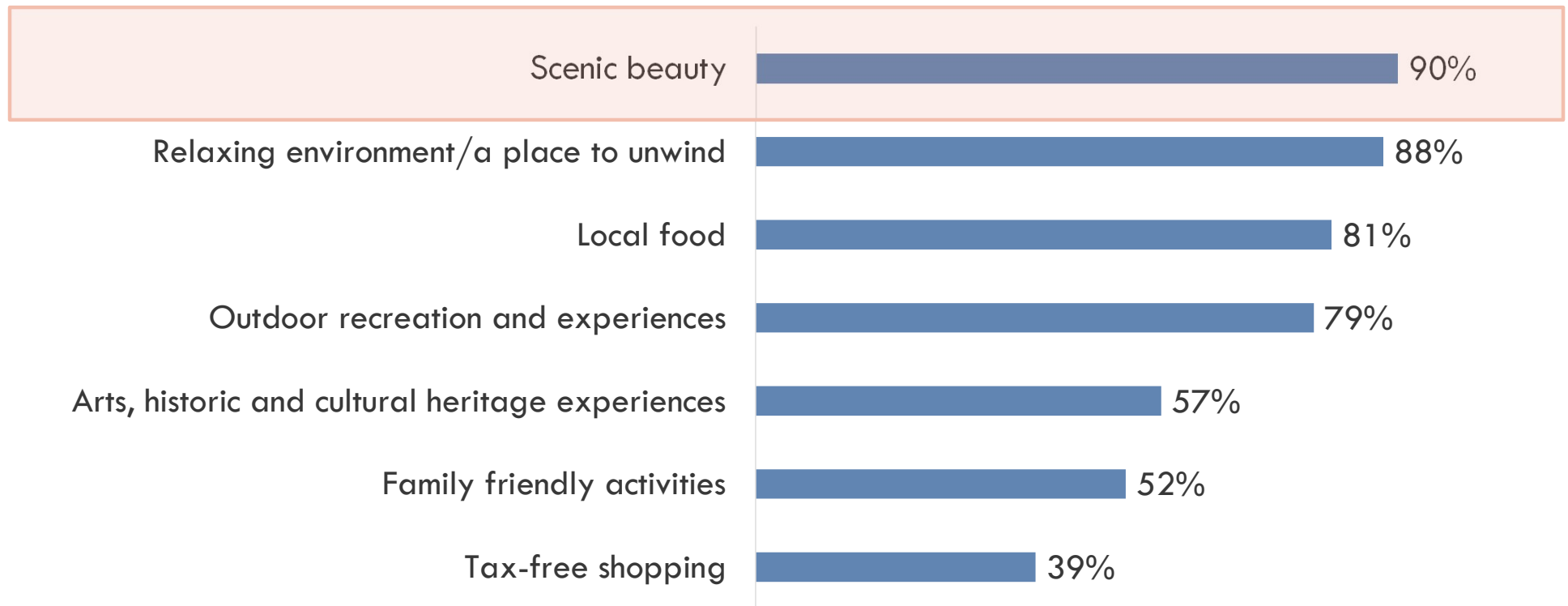
# LEARNING 2

Travel motivators may  
not be what you expect.



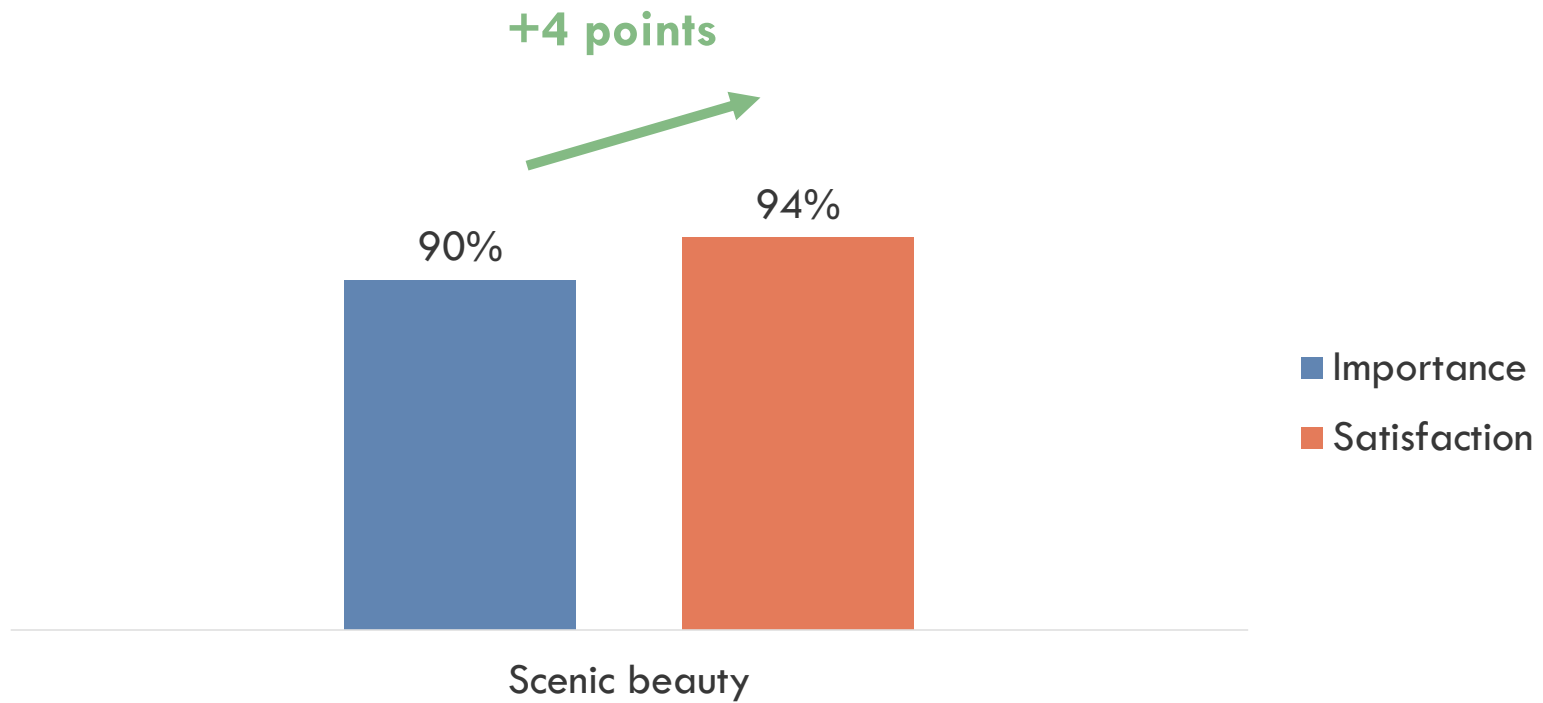
## TOP ACTIVITY SELECTION FACTORS

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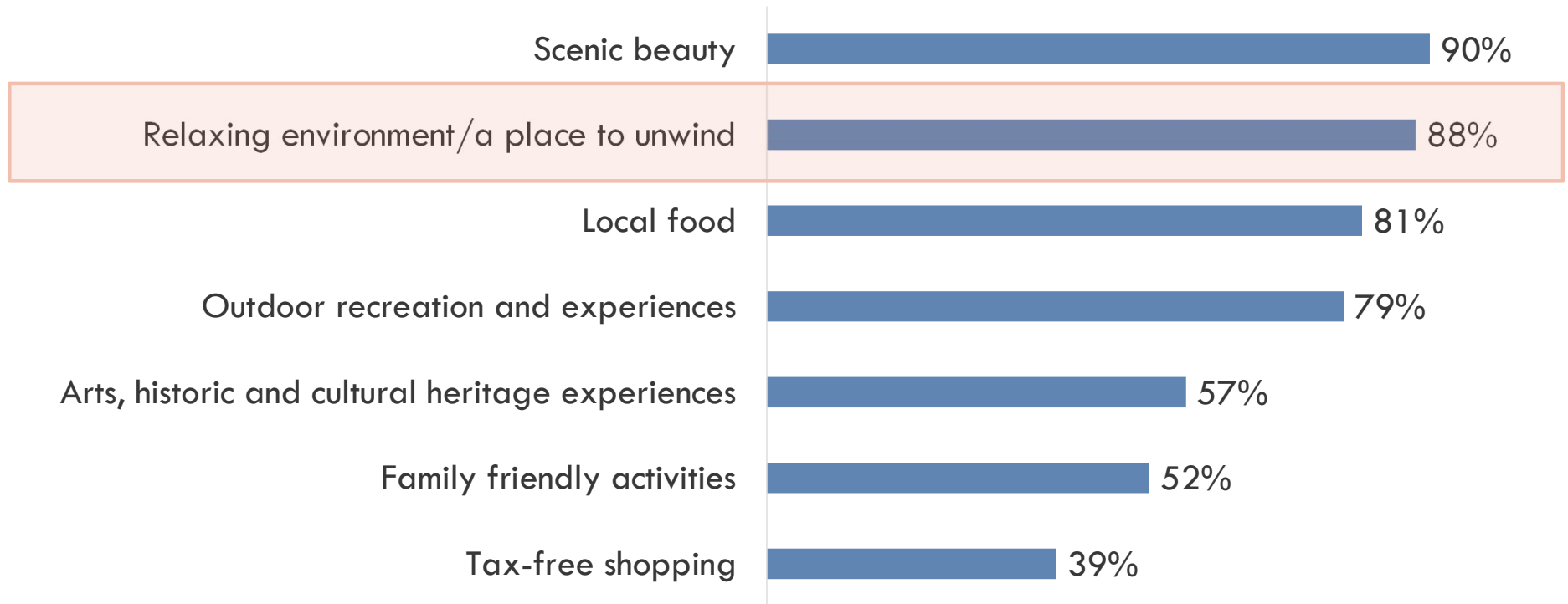
## IMPORTANCE VS SATISFACTION – SCENIC BEAUTY

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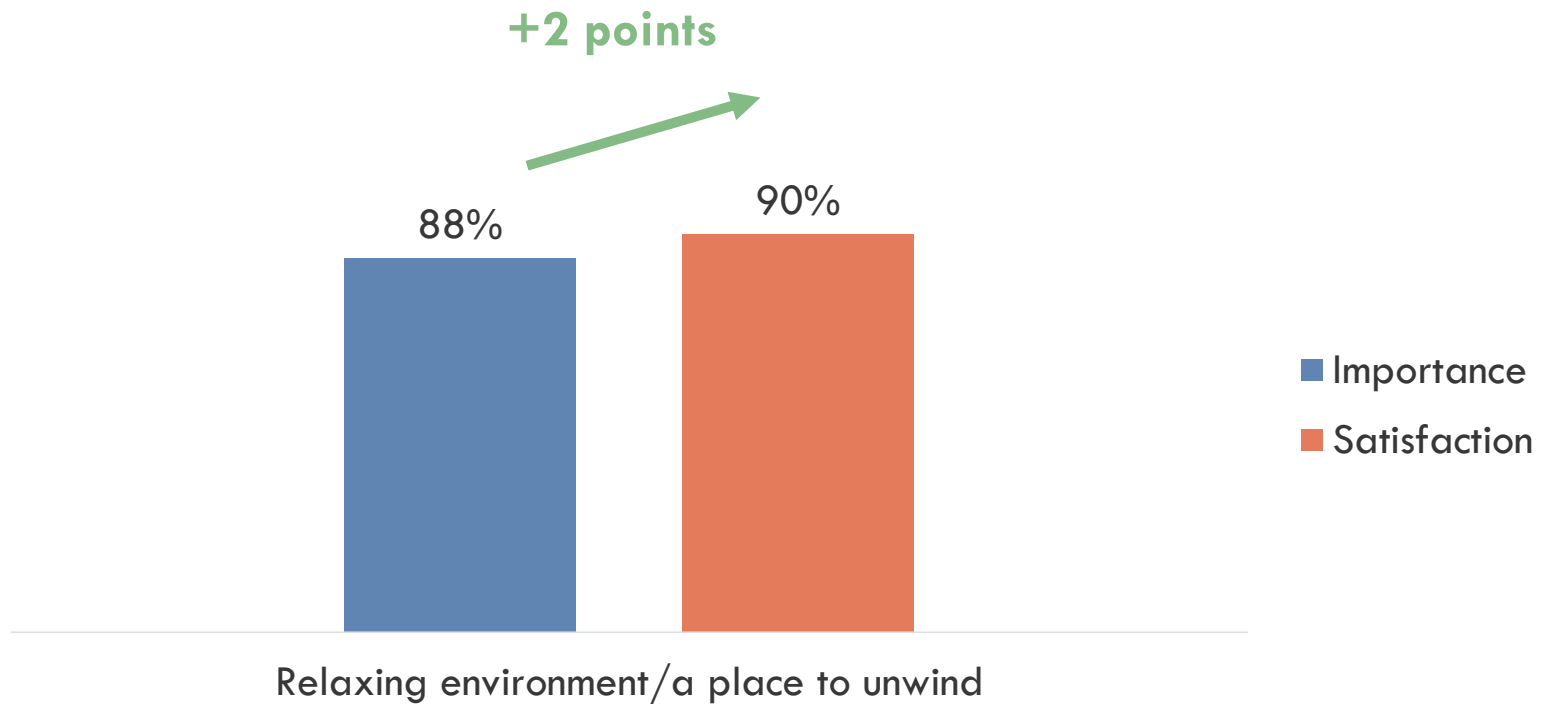
## TOP ACTIVITY SELECTION FACTORS

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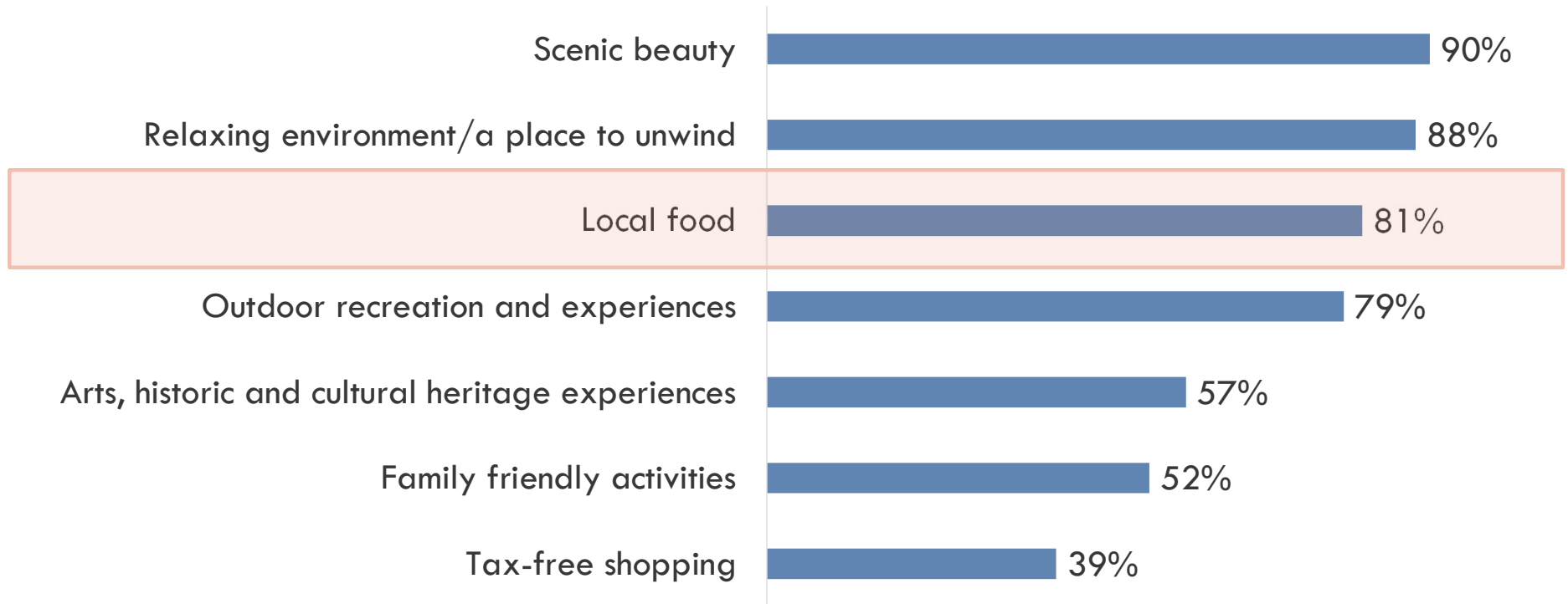
## IMPORTANCE VS SATISFACTION – RELAXING

---



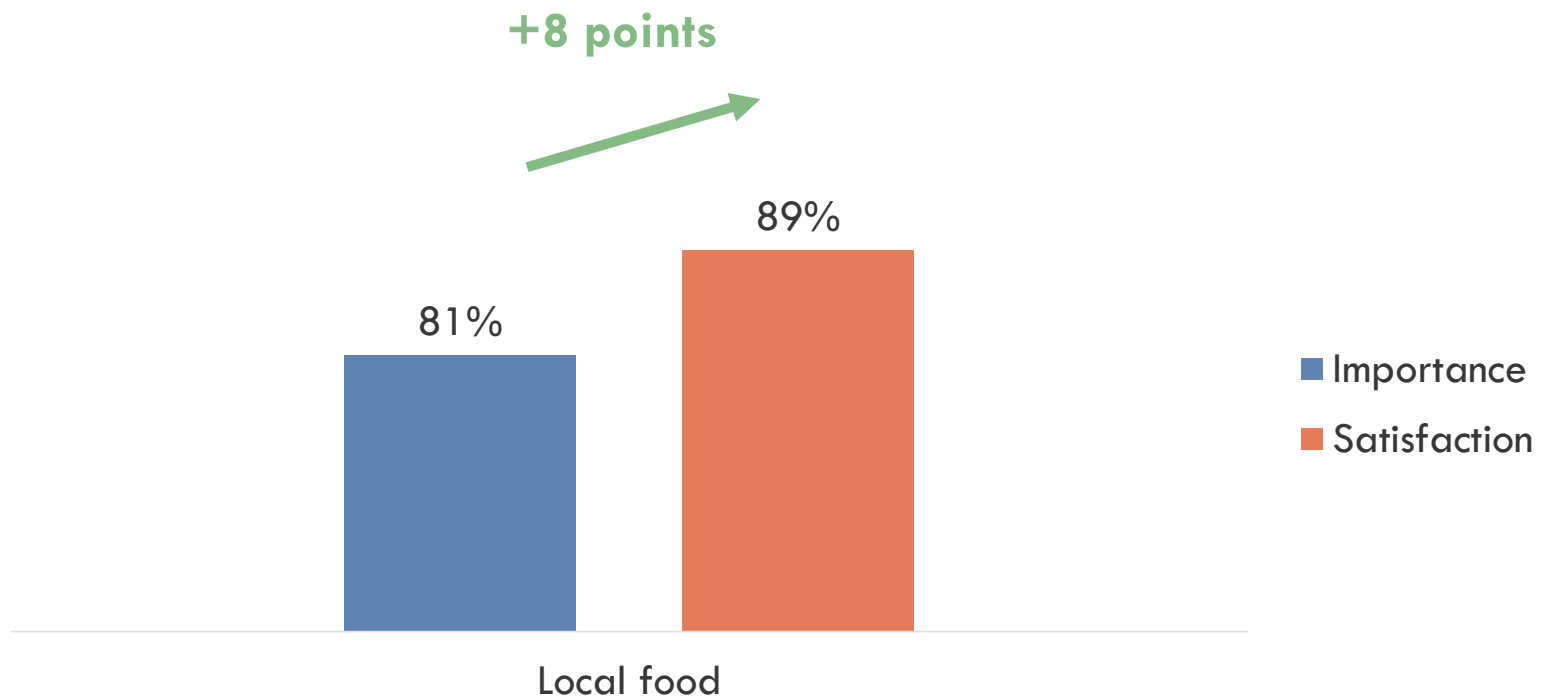
## TOP ACTIVITY SELECTION FACTORS

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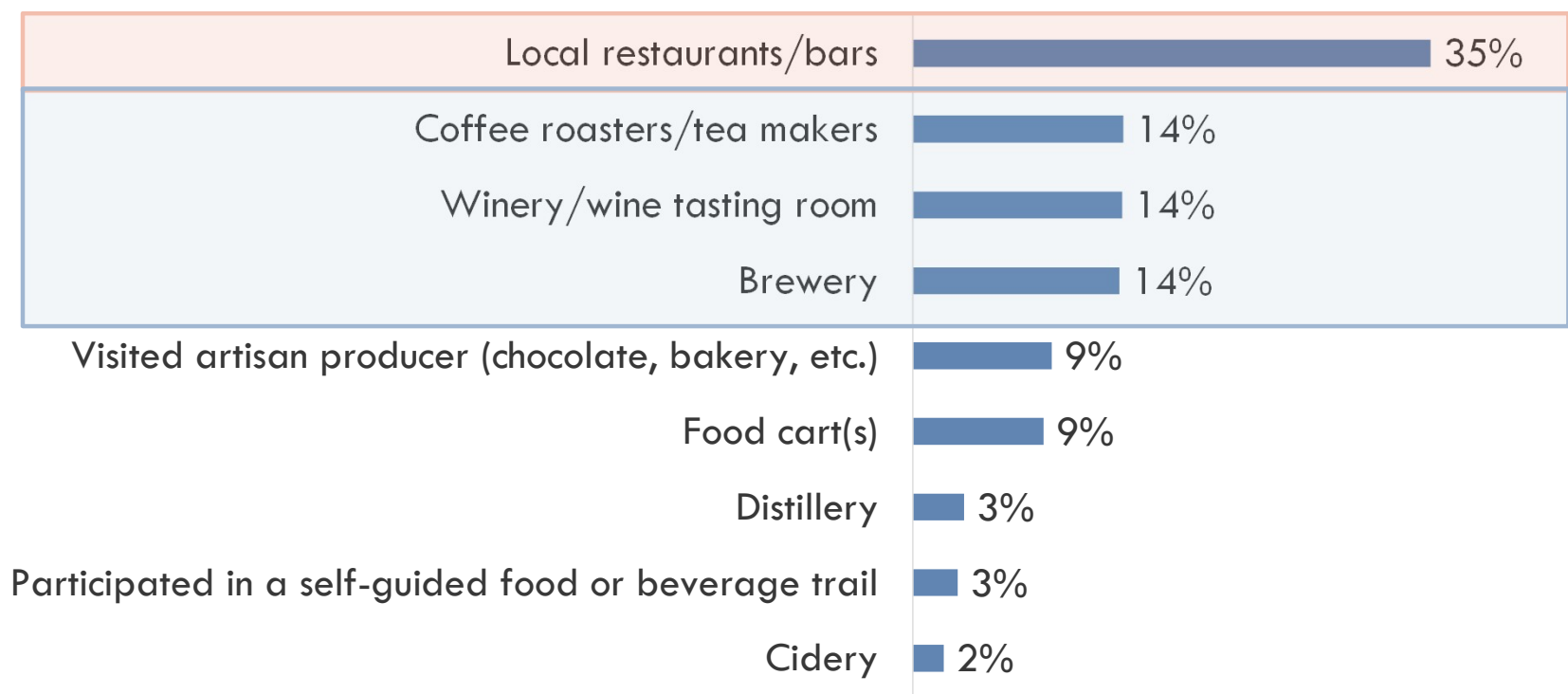


## IMPORTANCE VS SATISFACTION – LOCAL FOOD

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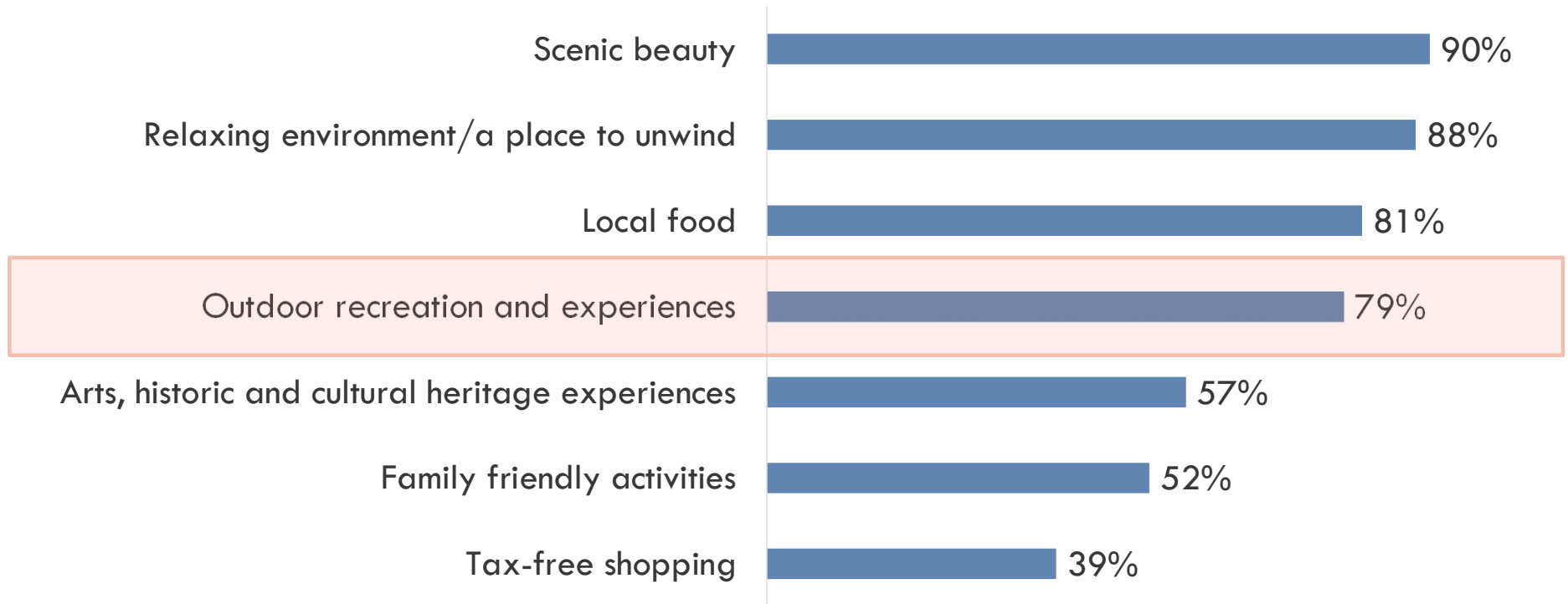


# LOCAL FOOD ACTIVITIES

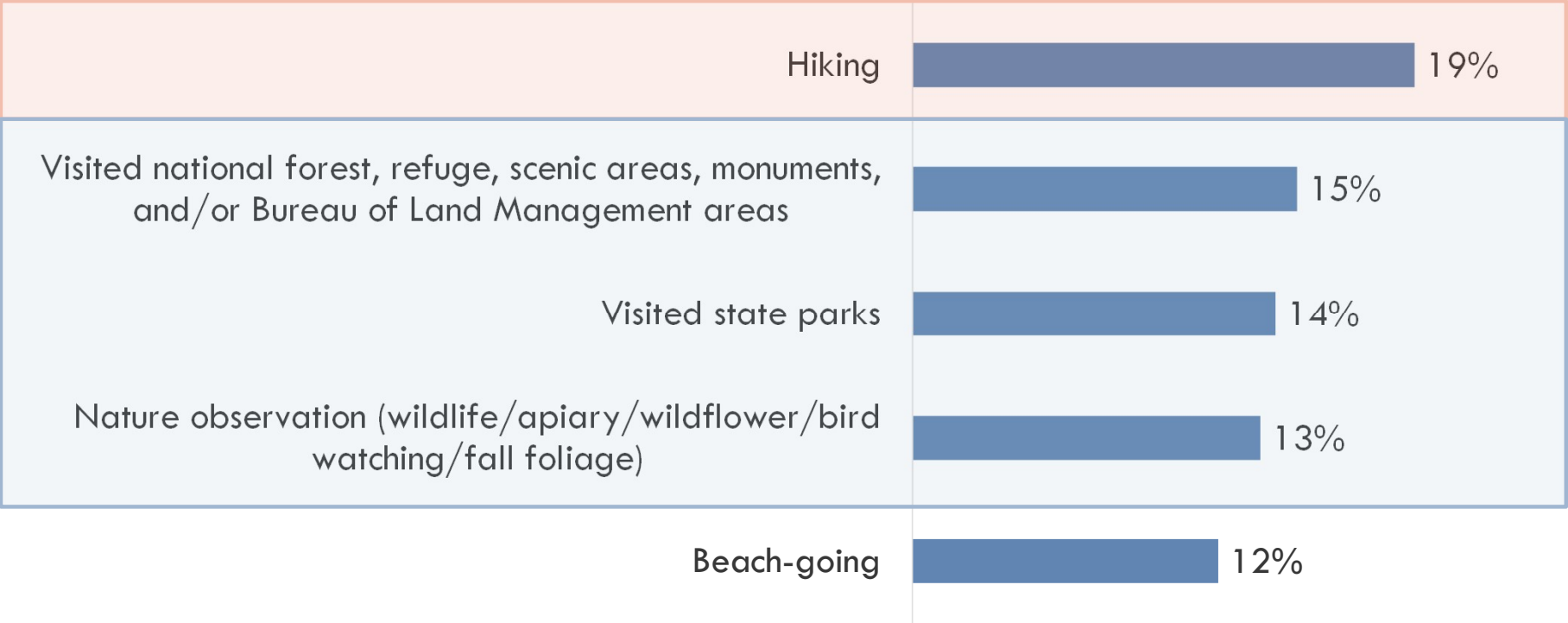


## TOP ACTIVITY SELECTION FACTORS

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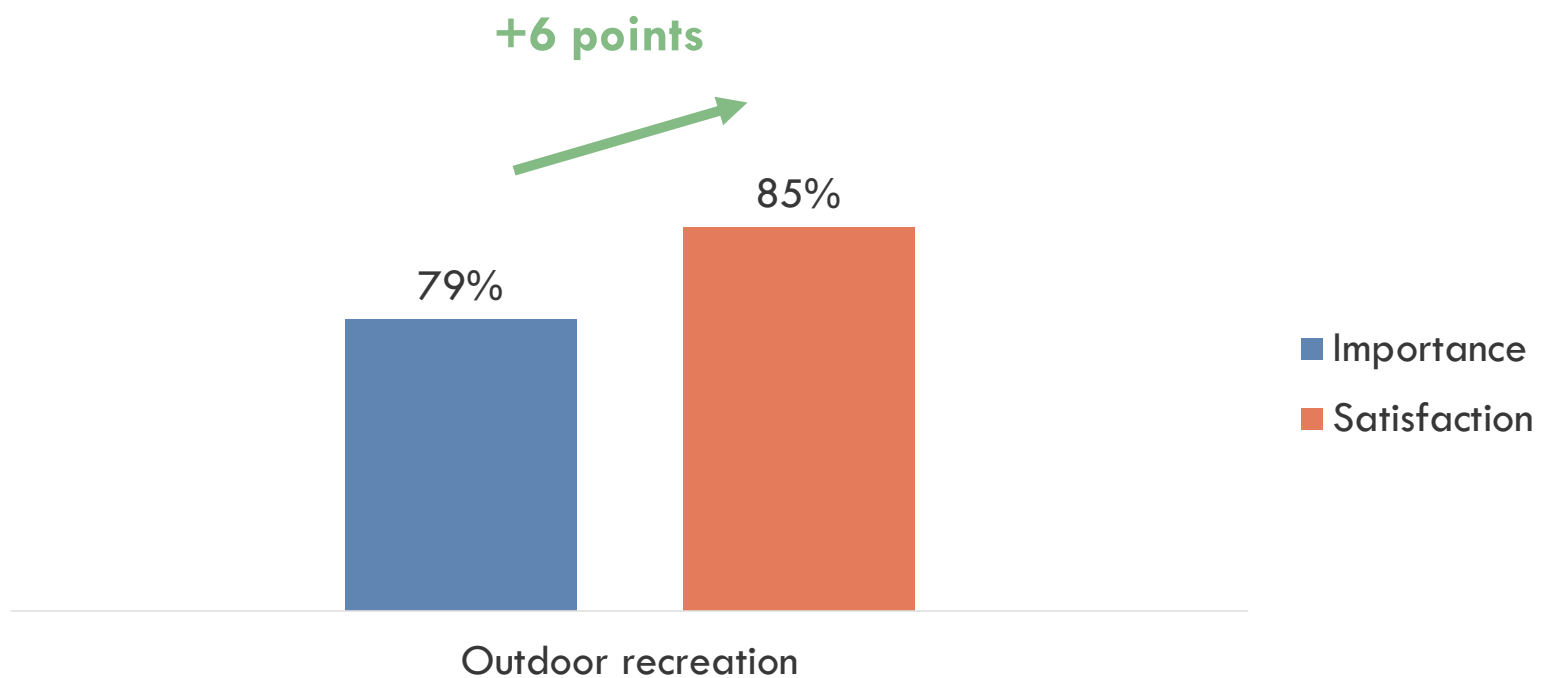


# TOP OUTDOOR RECREATION ACTIVITIES



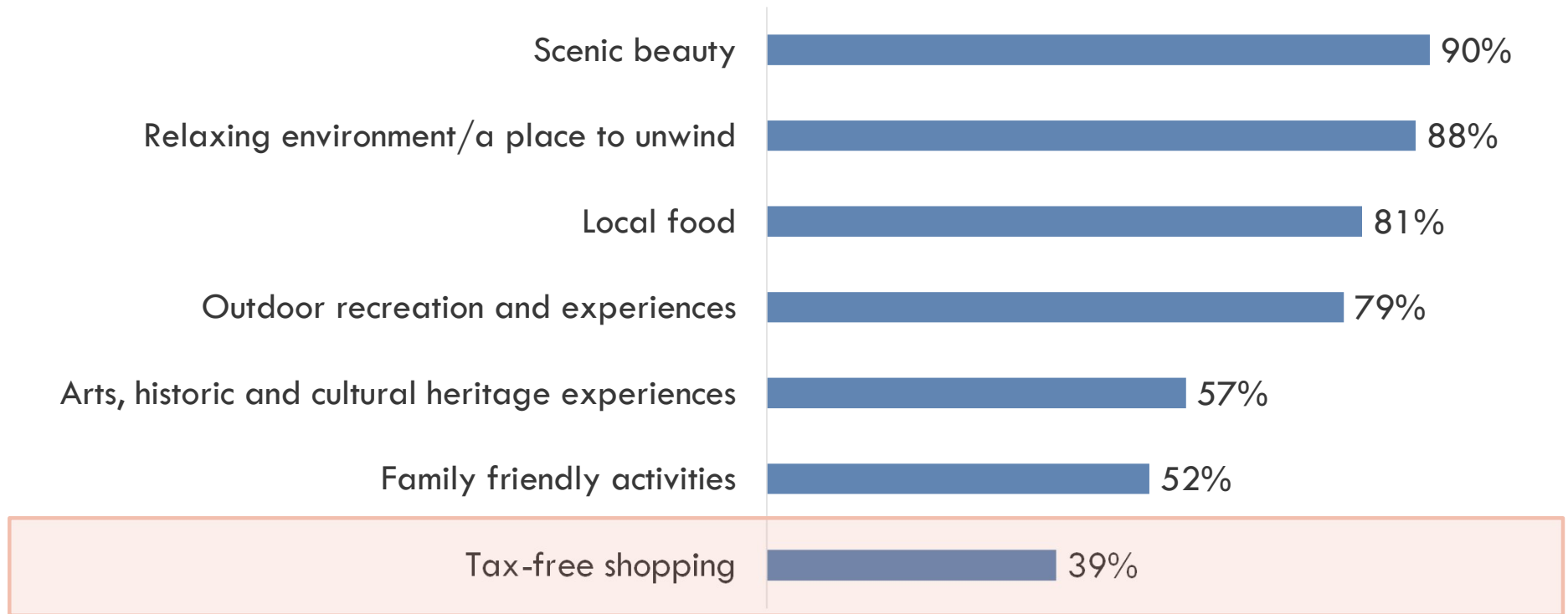
## IMPORTANCE VS SATISFACTION – OUTDOOR RECREATION

---



## TOP ACTIVITY SELECTION FACTORS

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## IMPORTANCE VS SATISFACTION – SHOPPING

---



# TAKE AWAY

**Understanding what inspires visitors to take a trip to Oregon is key for marketing messages.**

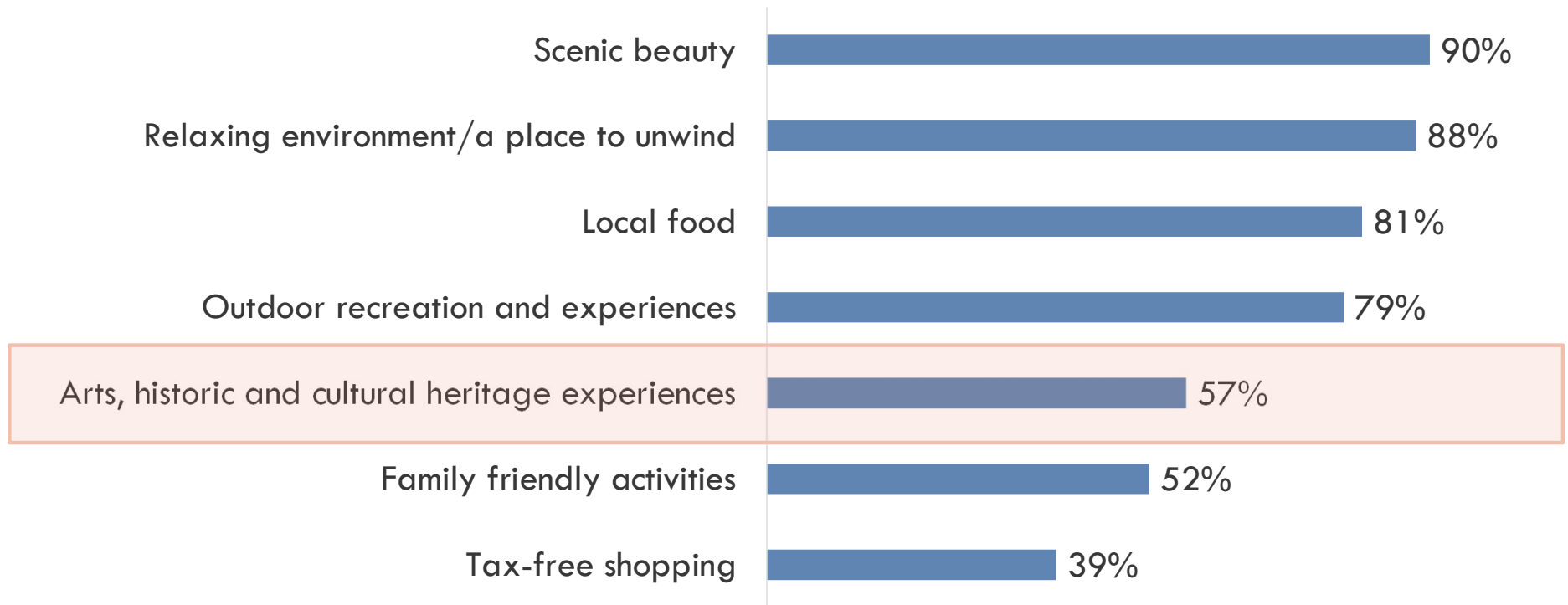
# LEARNING 3

Culture is a surprising aspect for visitors.



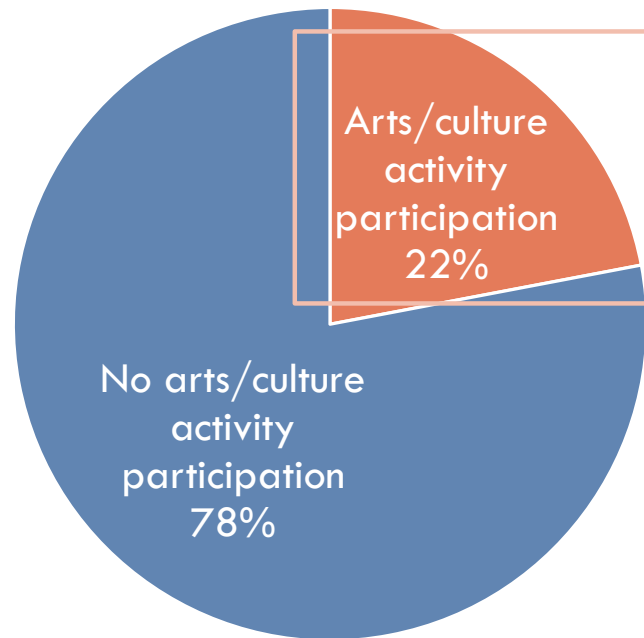
## TOP ACTIVITY SELECTION FACTORS

---

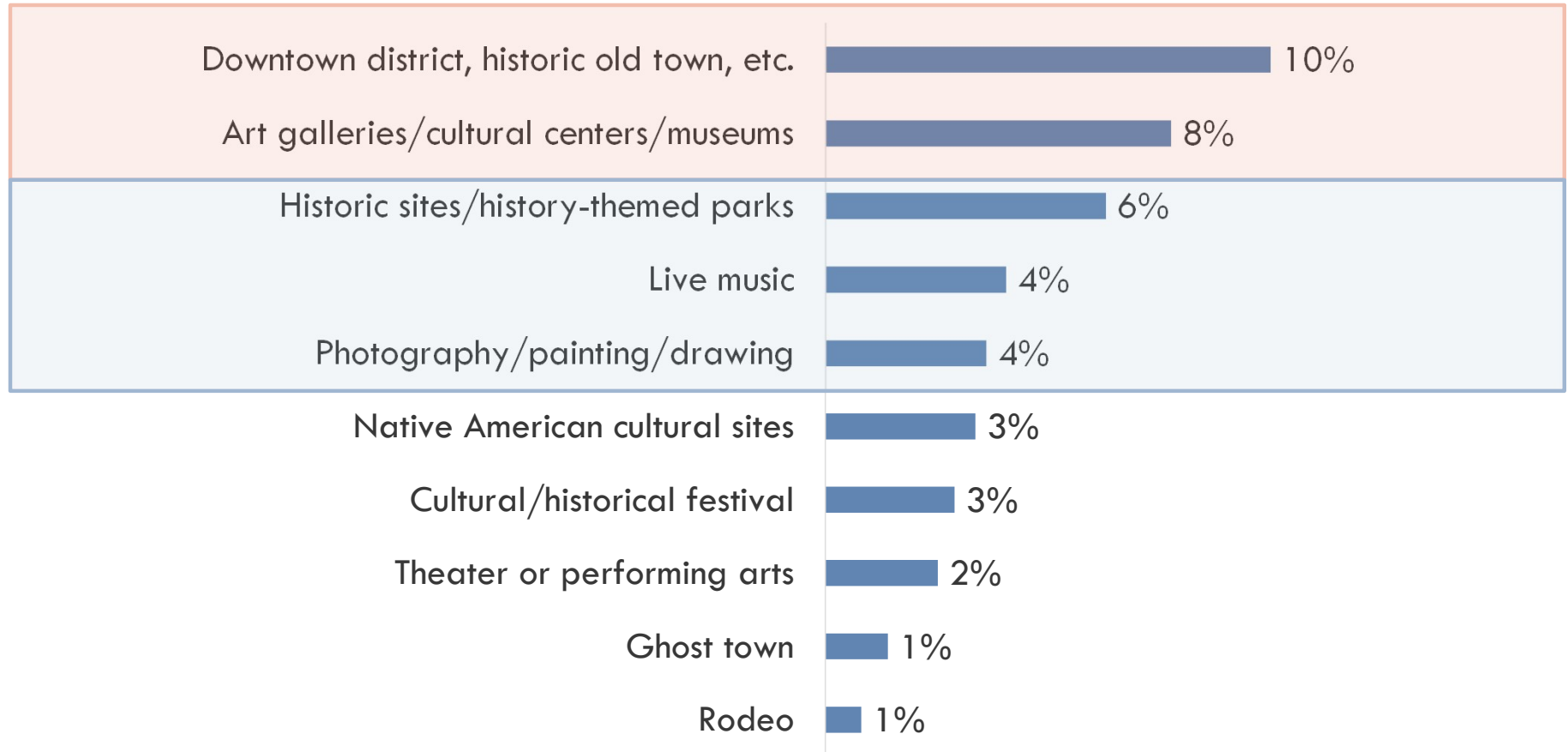


## ARTS & CULTURE ACTIVITIES

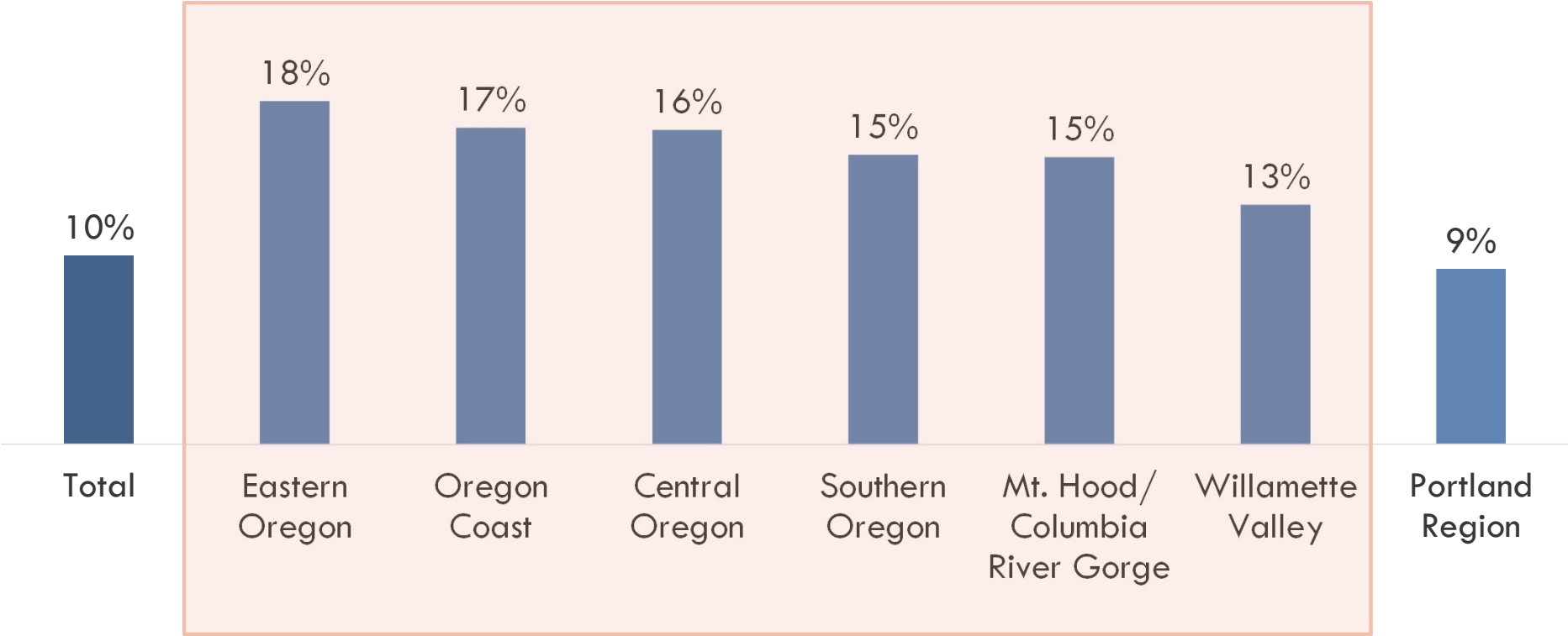
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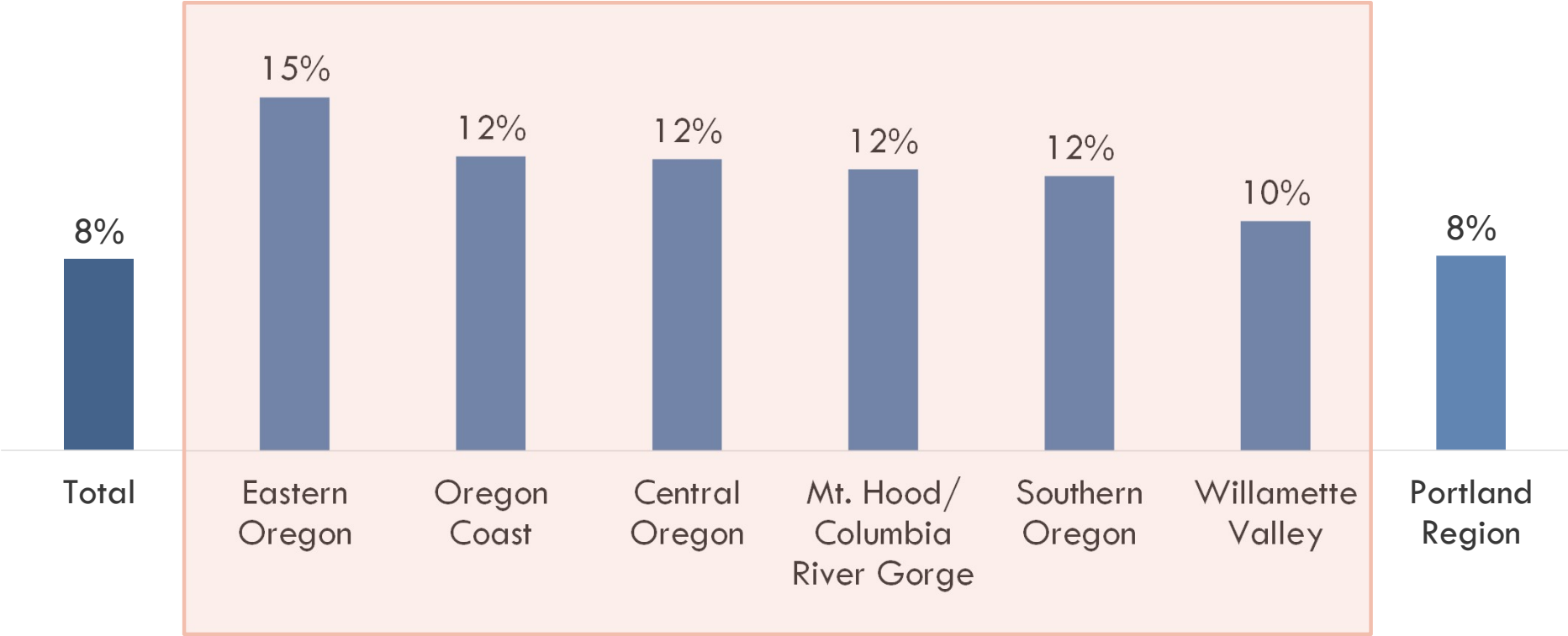
## ARTS & CULTURE ACTIVITIES



# VISITED DOWNTOWN DISTRICT, HISTORIC OLD TOWN, ETC.

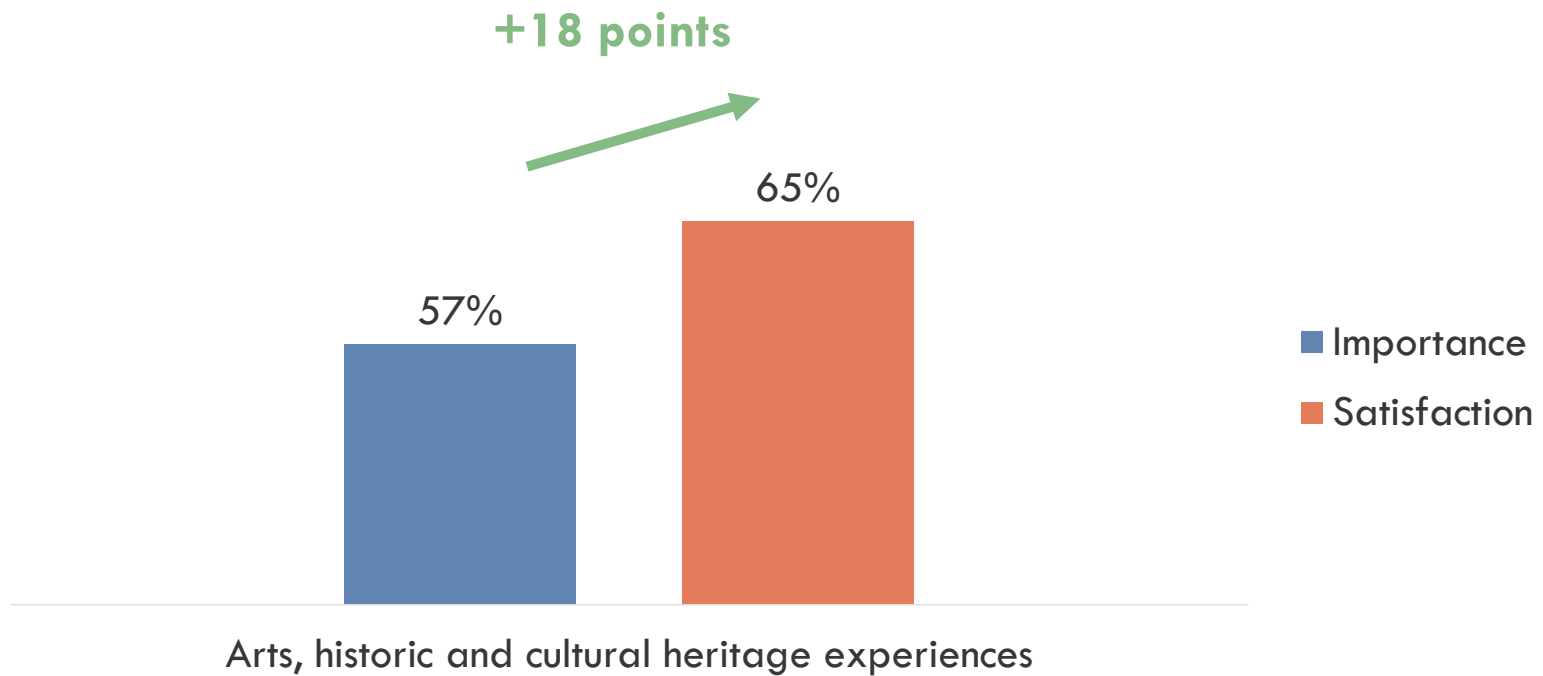


# VISITED ART GALLERIES, CULTURAL CENTERS, MUSEUMS, ETC.



## IMPORTANCE VS SATISFACTION – ARTS/HISTORY/CULTURE

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# **TAKE AWAY**

**Promote Oregon's unique history and cultural experiences.**

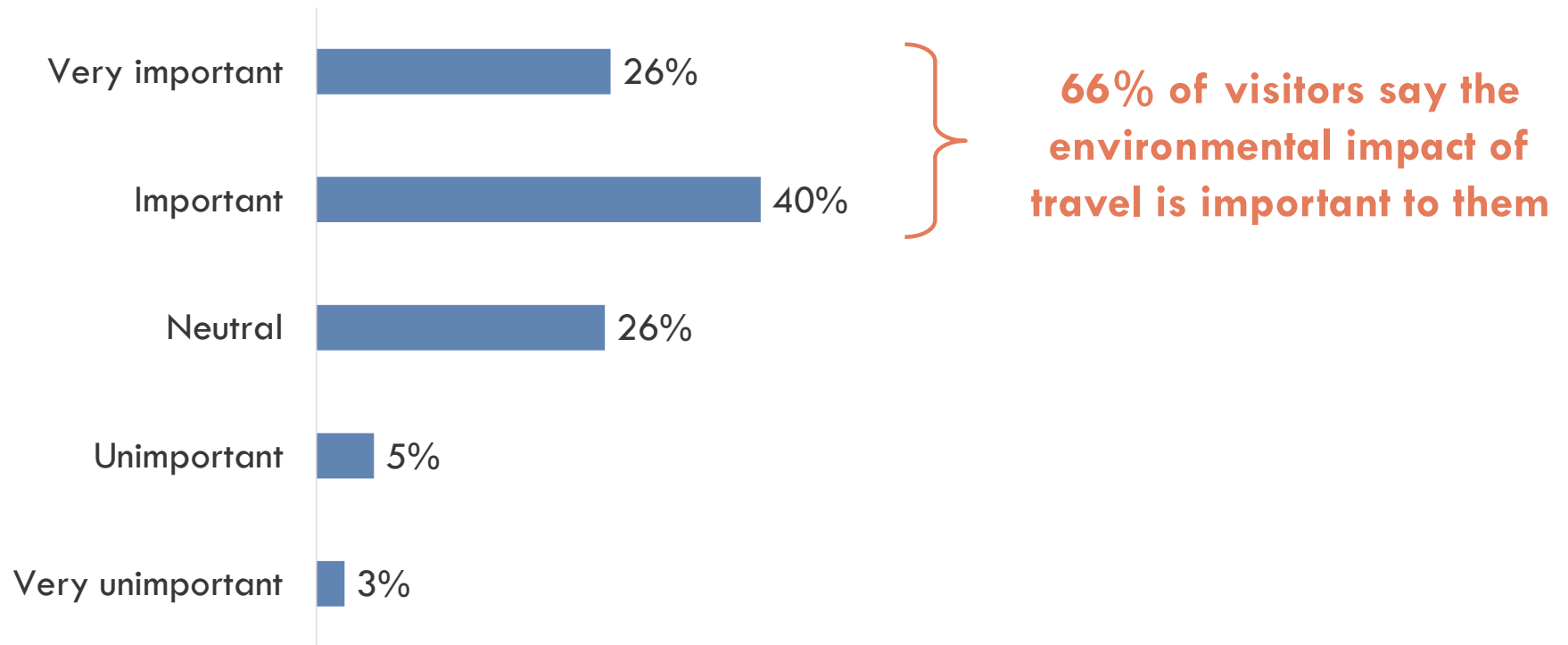
# LEARNING 4

The environment is  
important to travelers.

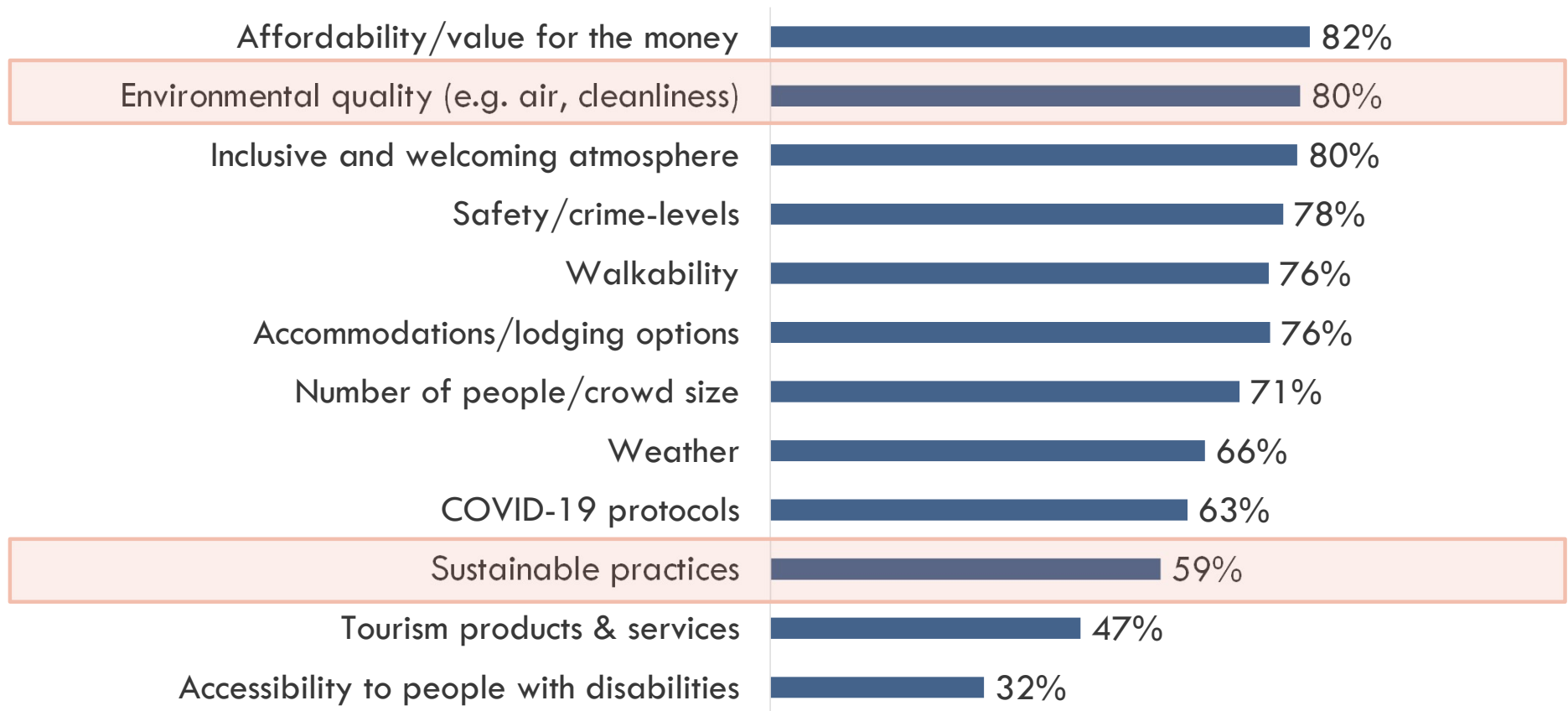


## TRAVEL ENVIRONMENTAL IMPACT IMPORTANCE

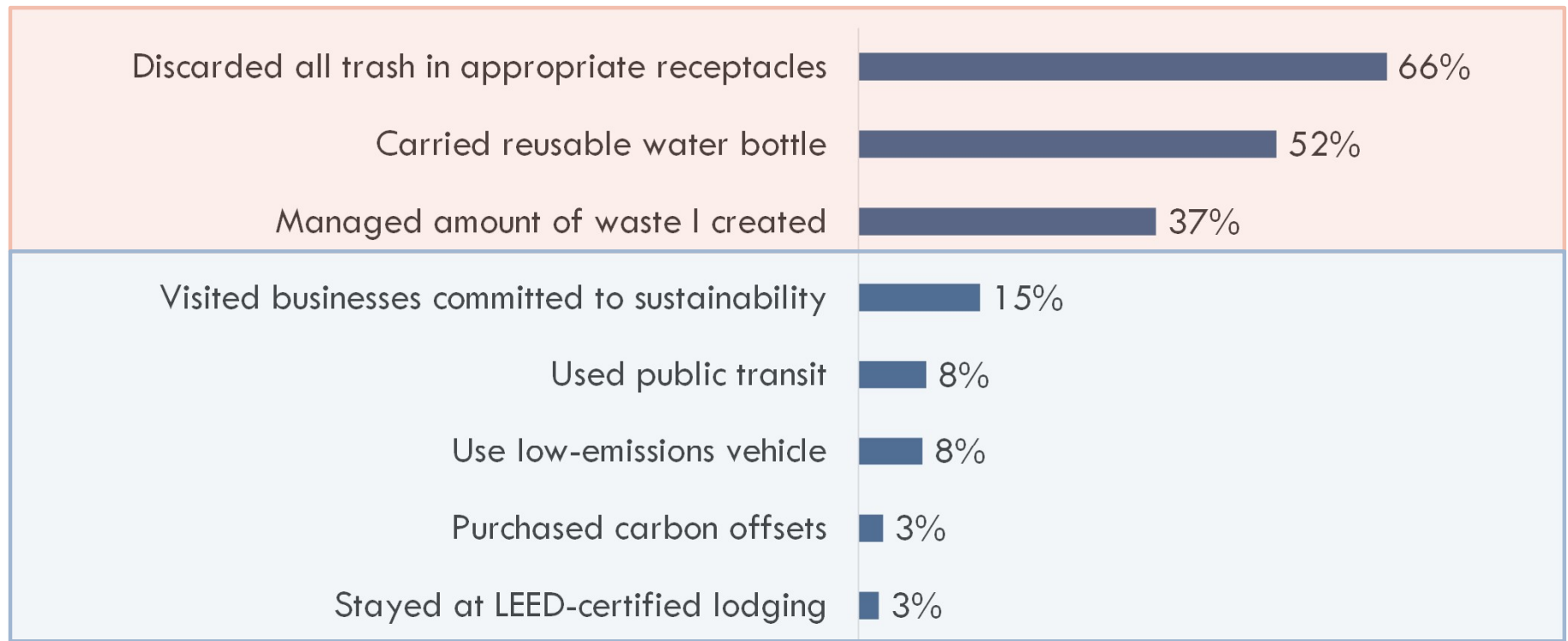
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## OREGON SELECTION FACTORS

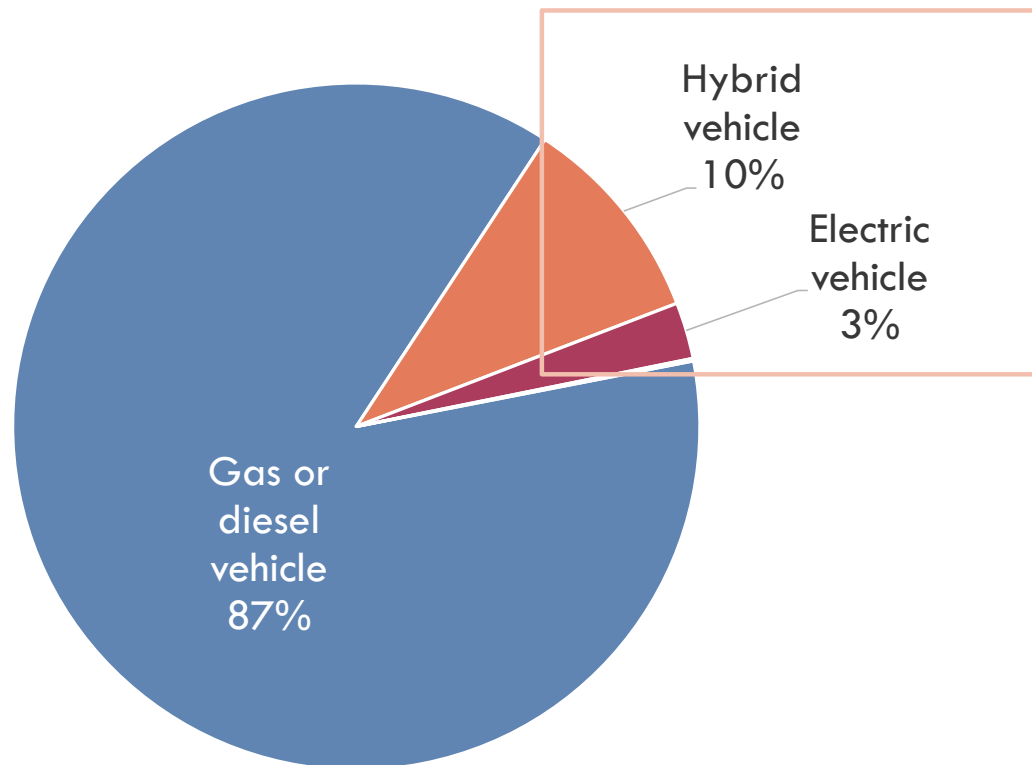


## VISITOR ACTIONS



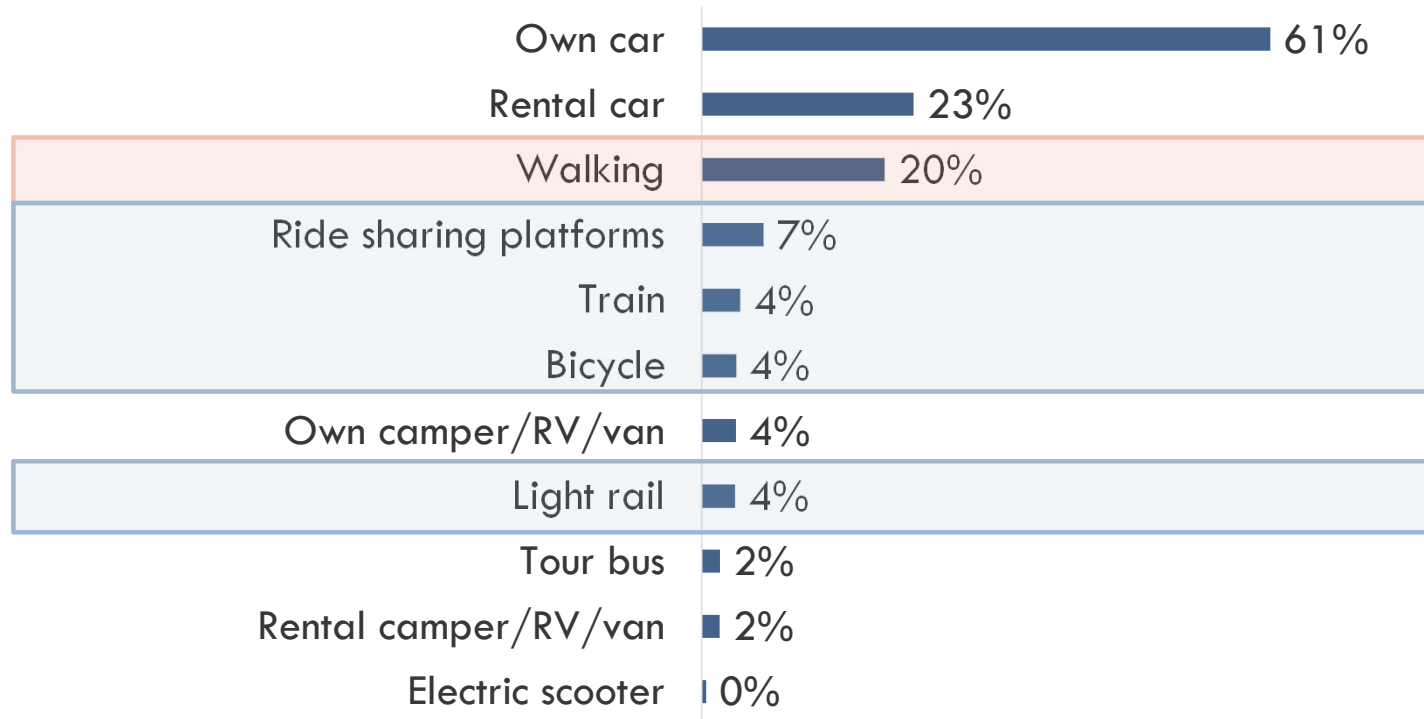
## ARRIVAL/DEPARTURE VEHICLE

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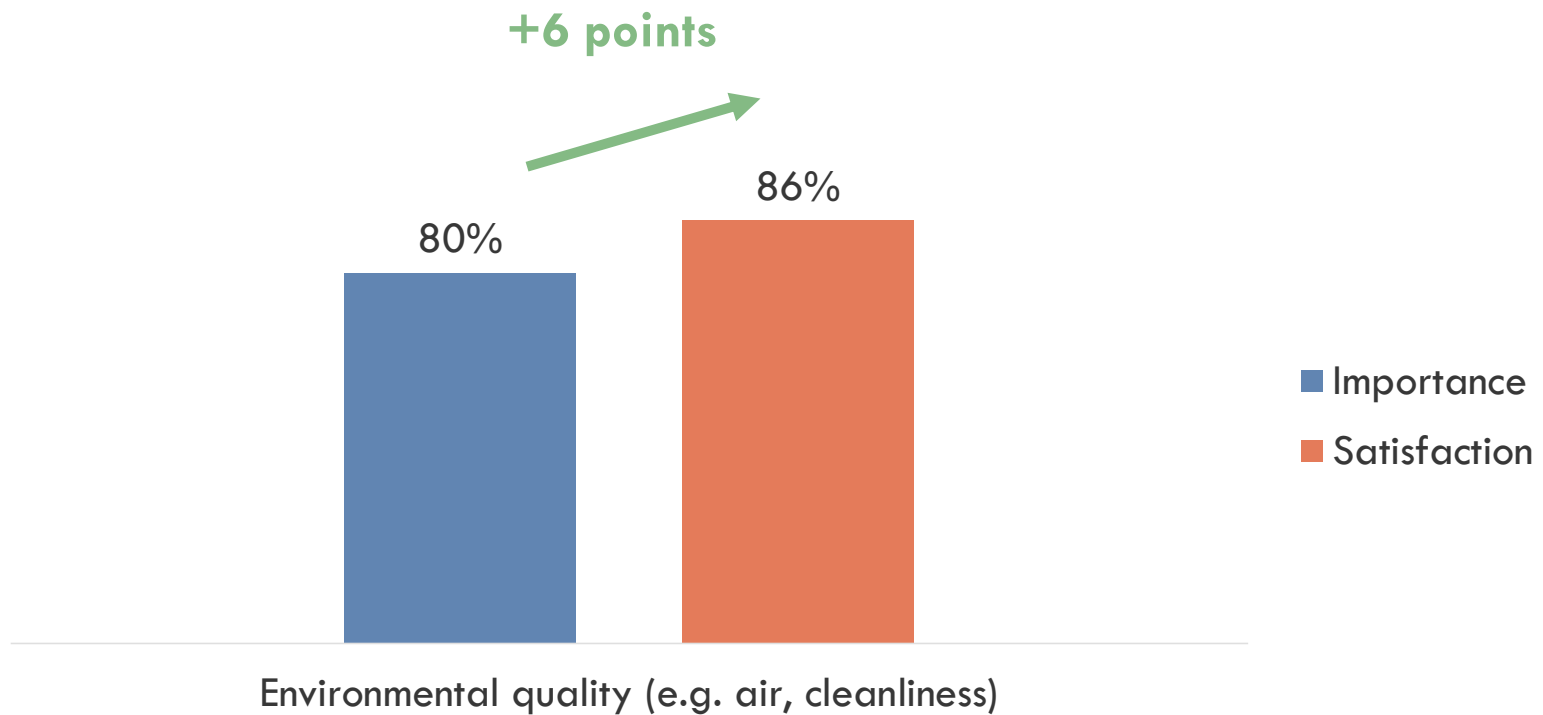
## IN-DESTINATION TRANSPORT

---



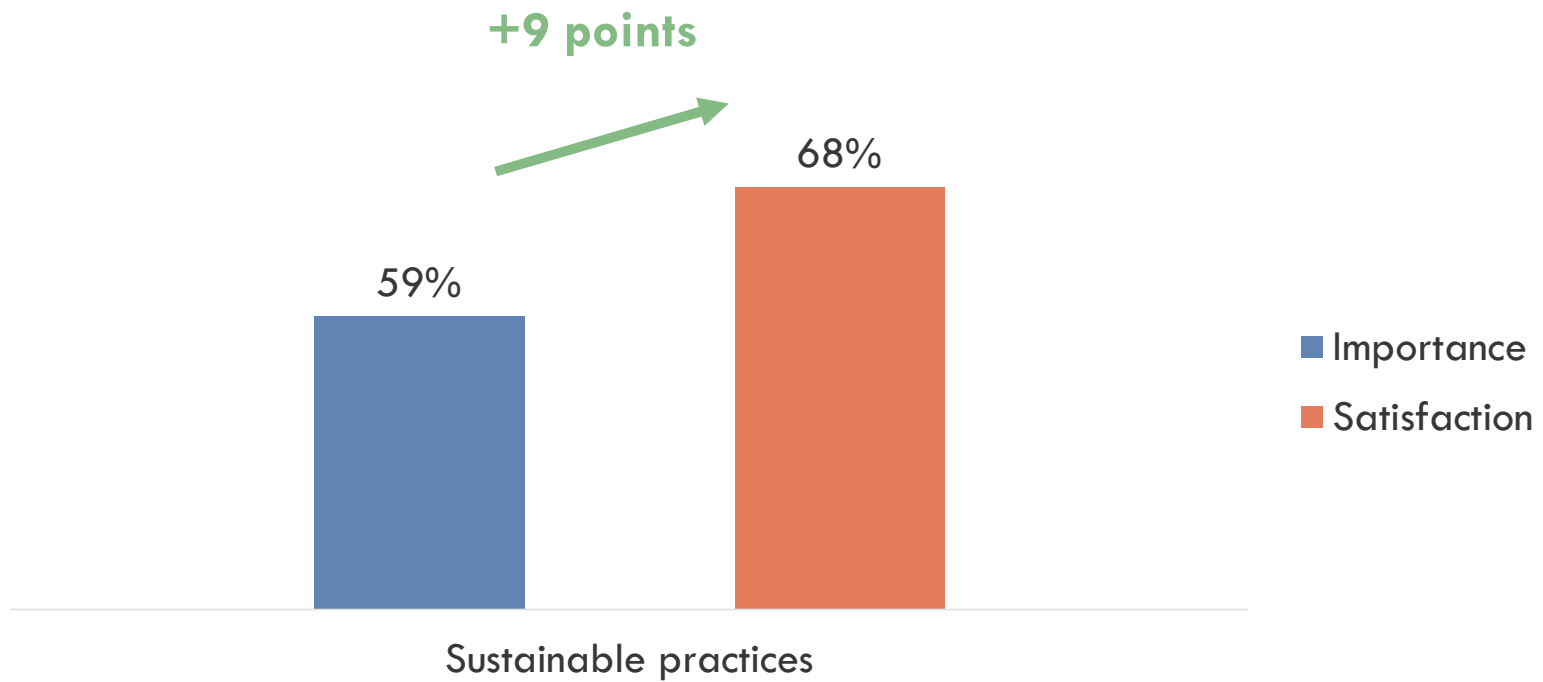
## IMPORTANCE VS SATISFACTION – ENVIRONMENT QUALITY

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## IMPORTANCE VS SATISFACTION – SUSTAINABILITY

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# **TAKE AWAY**

**Continue to support sustainability practices  
and educate visitors.**

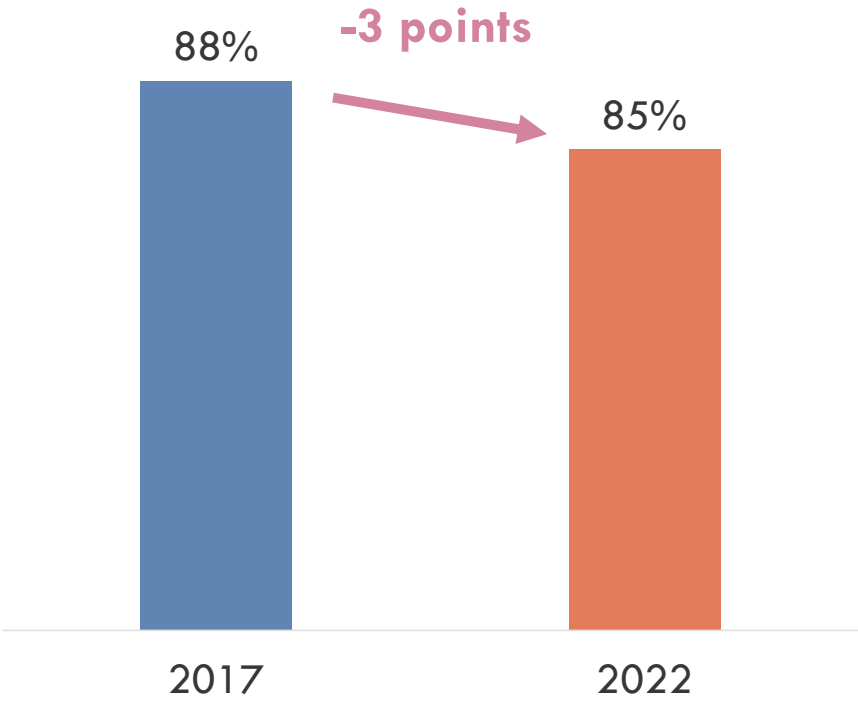
# LEARNING 5

Inclusivity is critical.

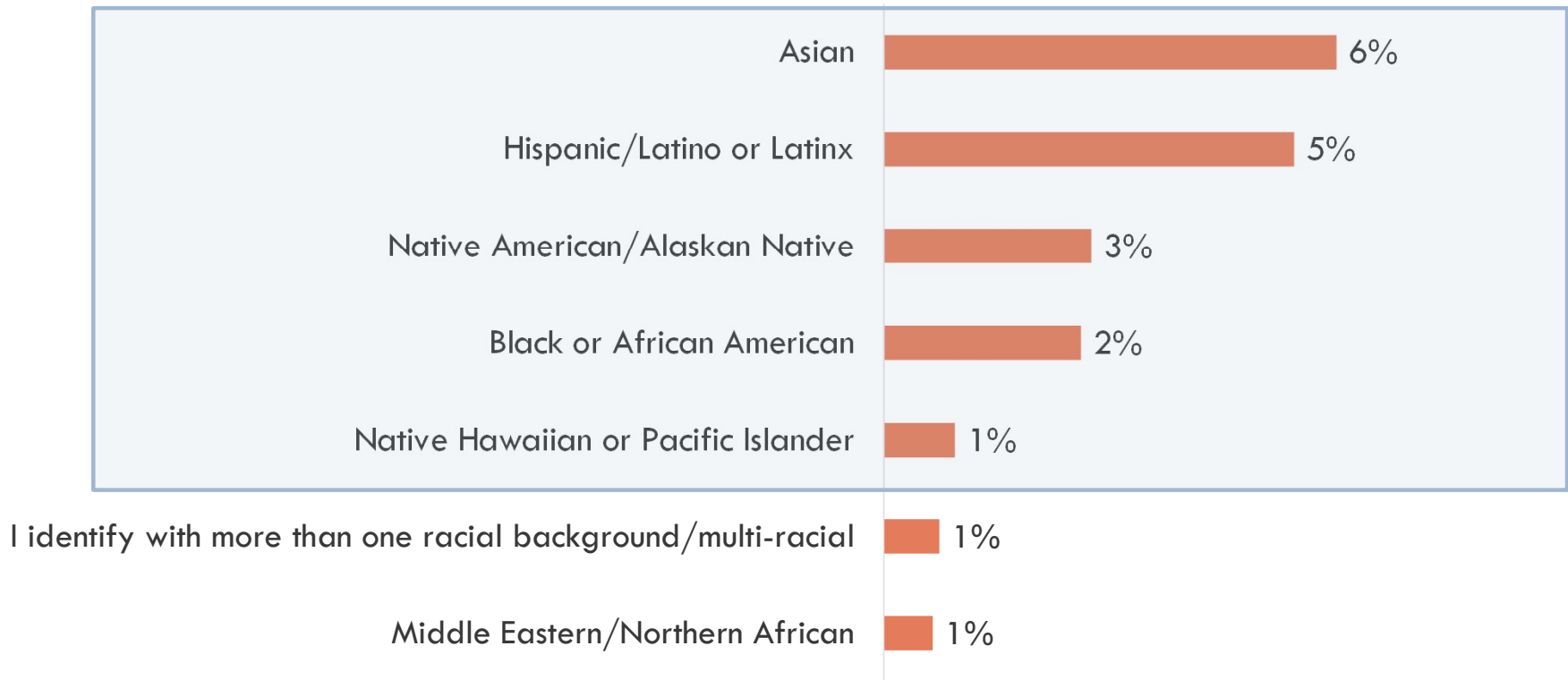


# OREGON VISITOR WHITE/CAUCASIAN

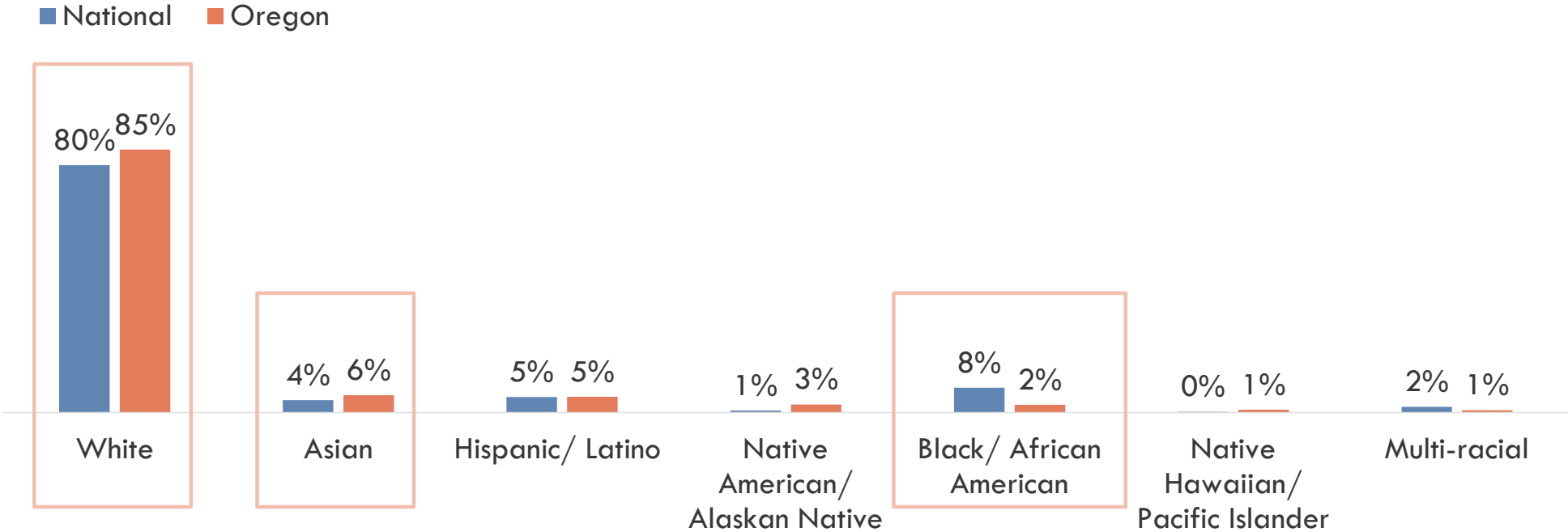
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# OREGON VISITOR RACE/ETHNICITY

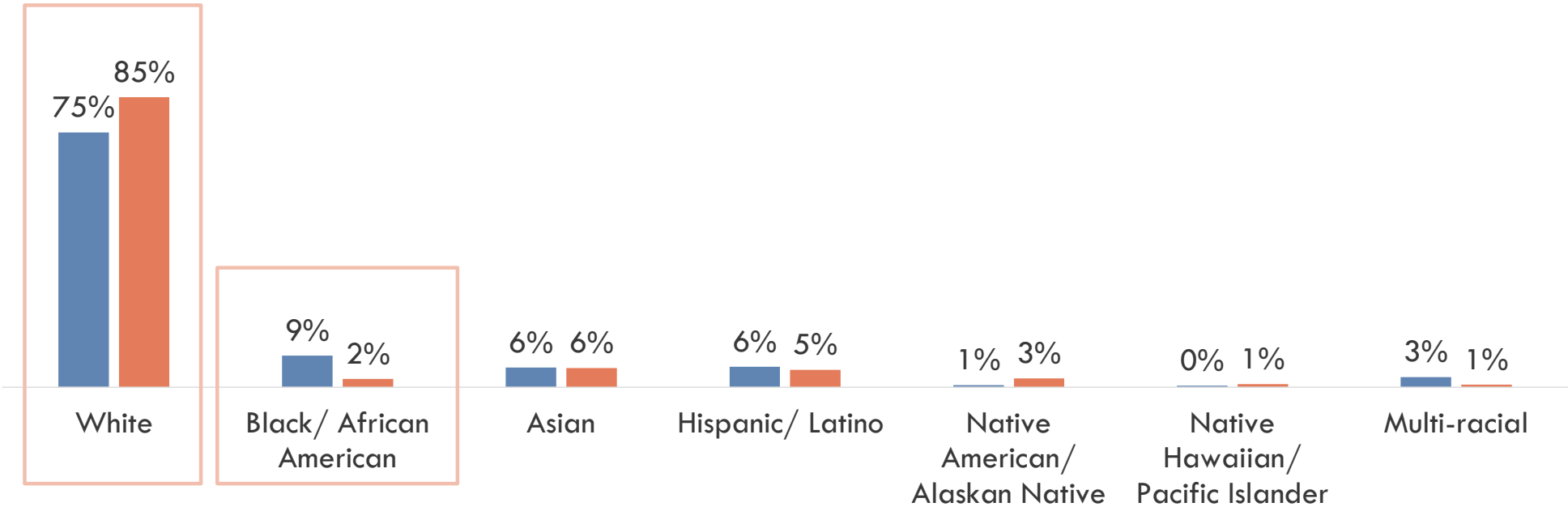


# NATIONAL TRAVELER VS OREGON VISITOR RACE/ETHNICITY



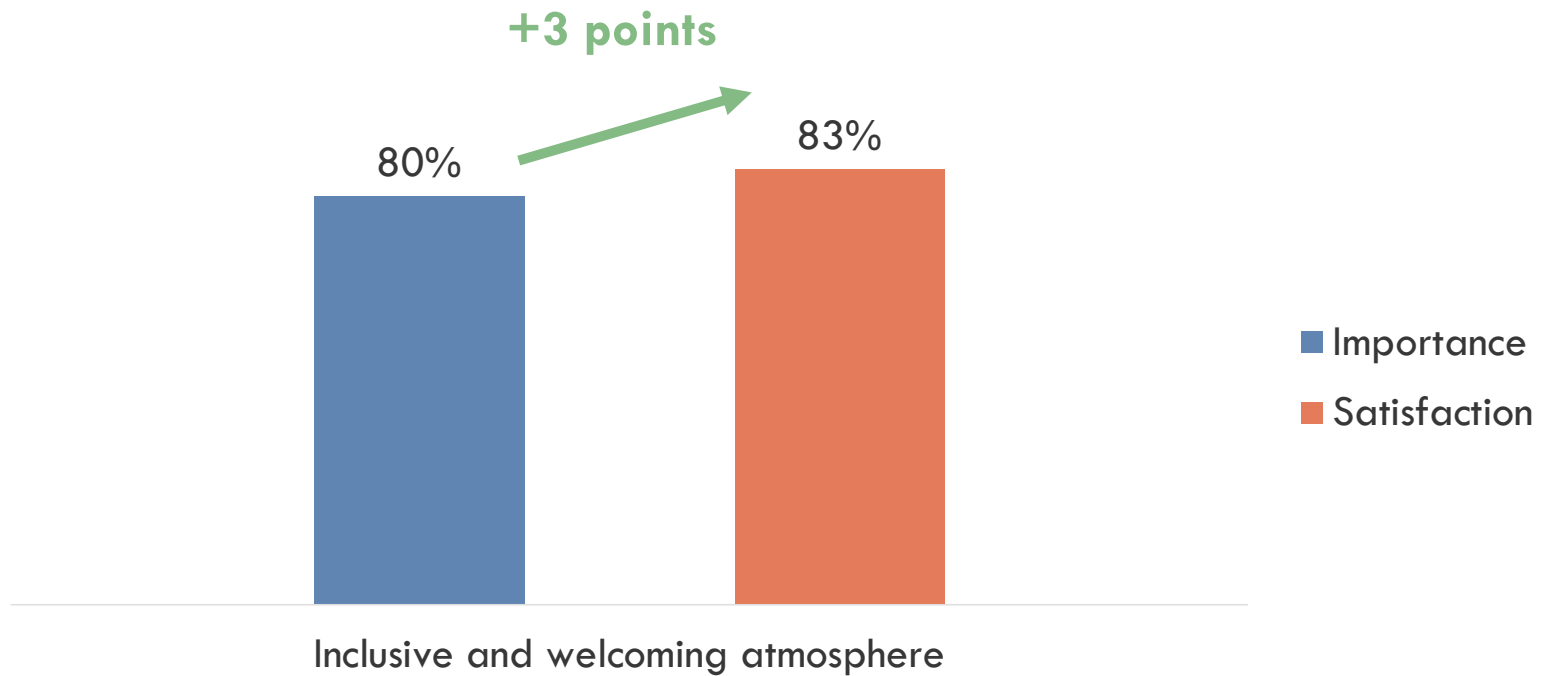
# NATIONAL TRAVELER LIKELY TO VISIT OREGON NEXT 3 YEARS

■ Interested Oregon ■ Oregon Visitor



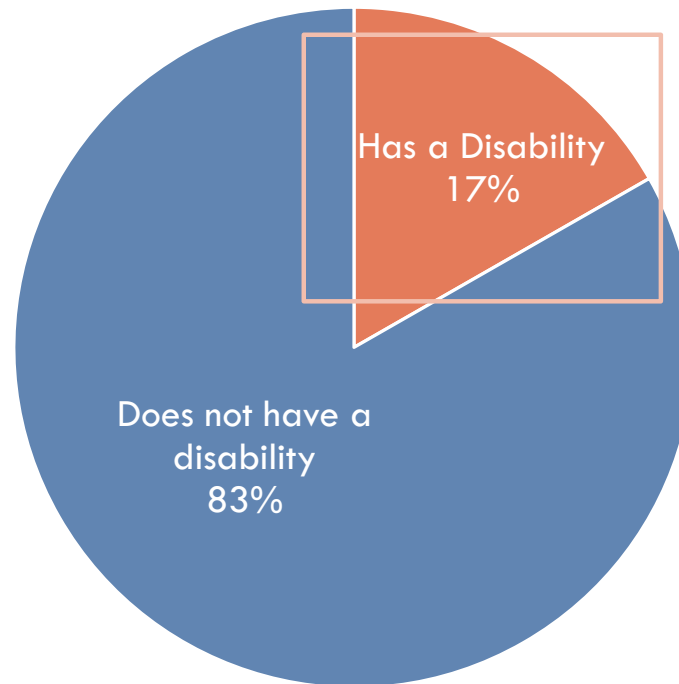
## IMPORTANCE VS SATISFACTION – INCLUSIVE

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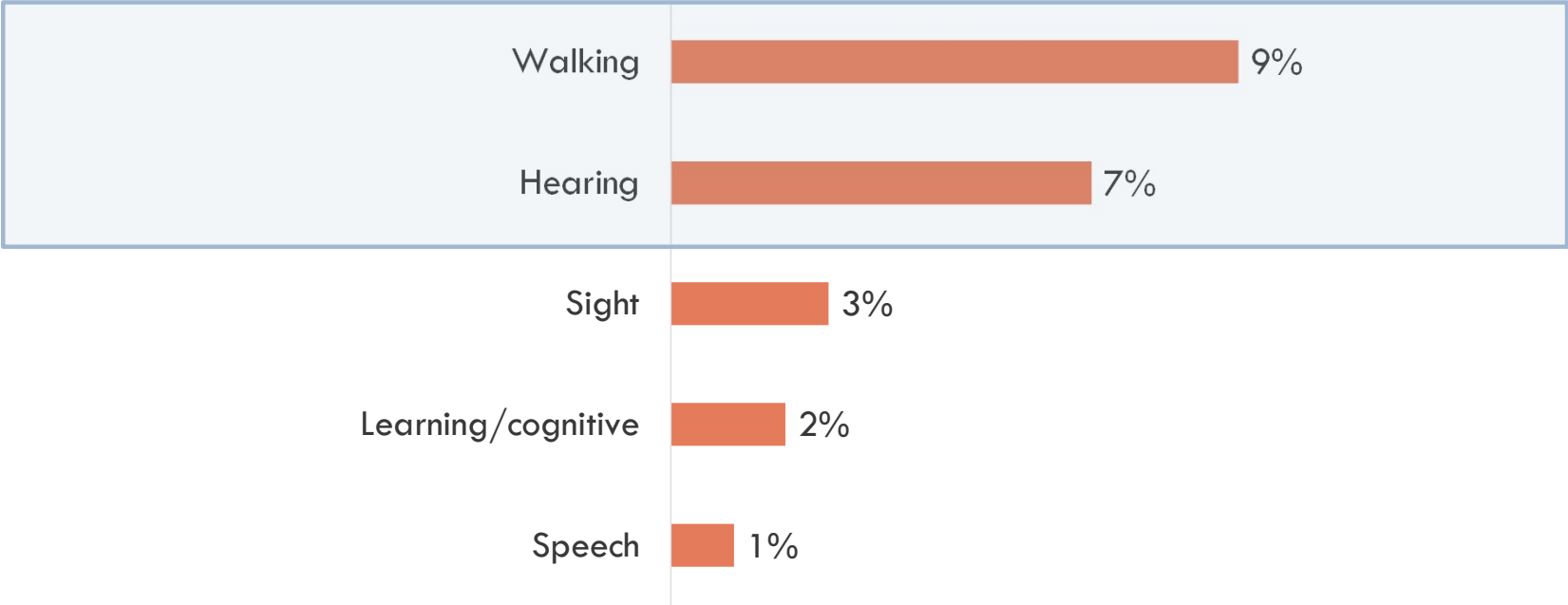
# DISABILITY

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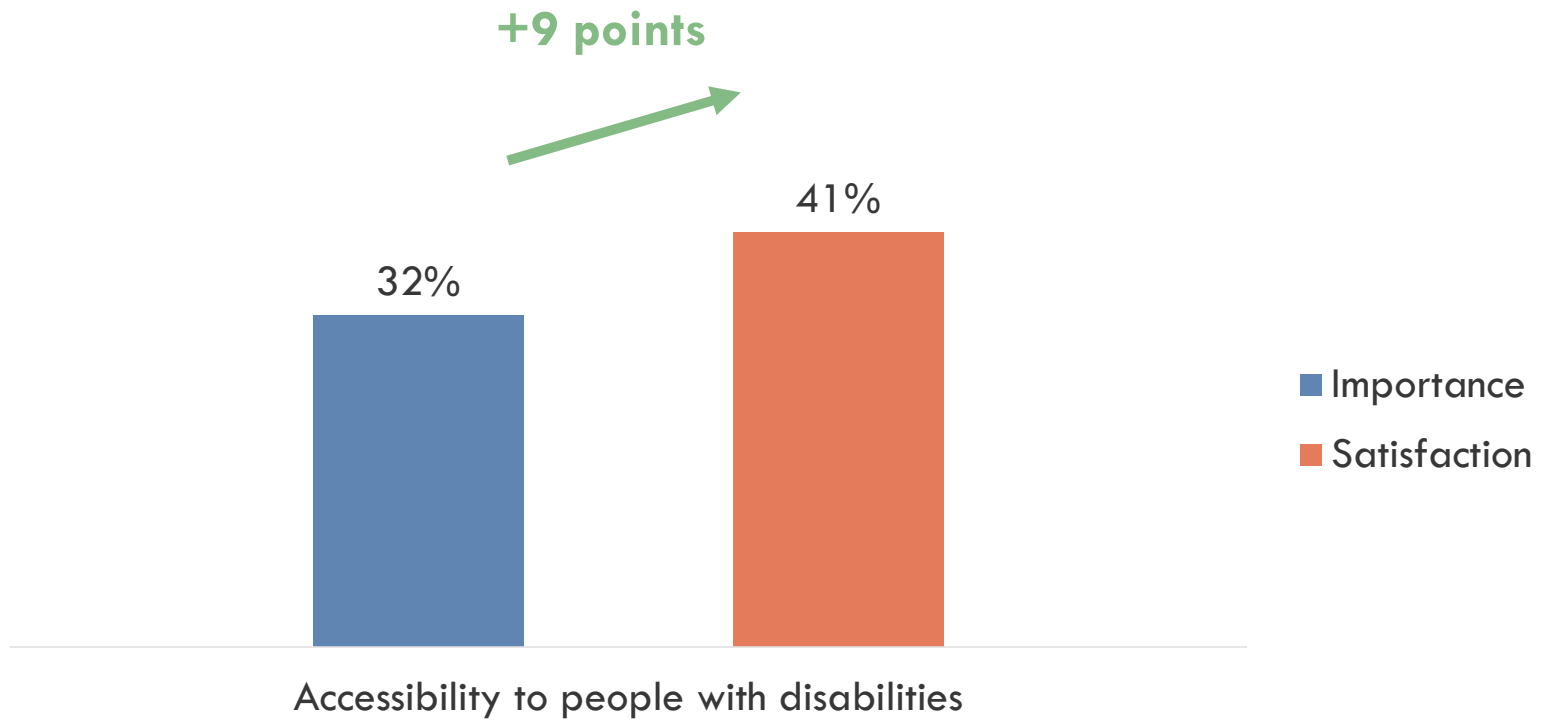
# DISABILITY TYPE

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## IMPORTANCE VS SATISFACTION – ACCESSIBILITY

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# TAKE AWAY

**Maintain focus on being inclusive and welcoming to all travelers.**

# LEARNING 6

Digital is everything.

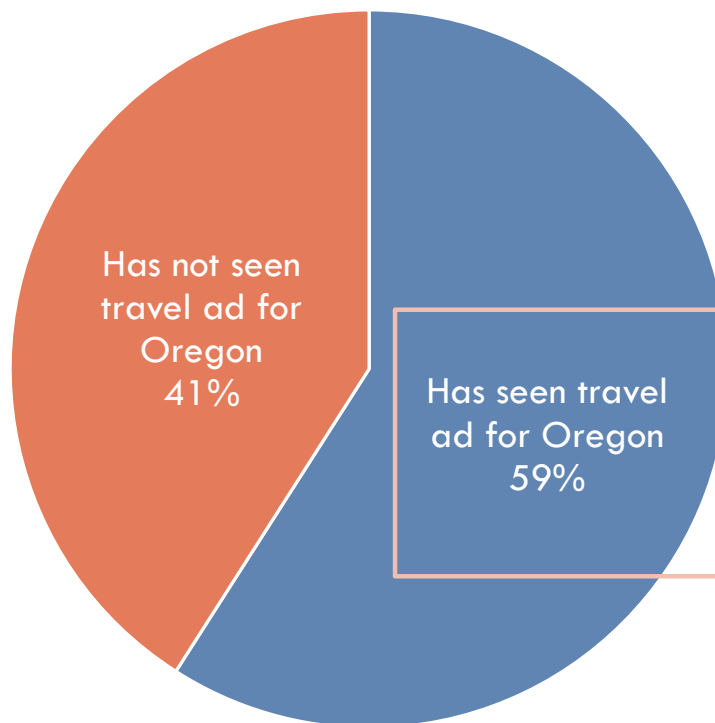


## PLANNING SOURCES



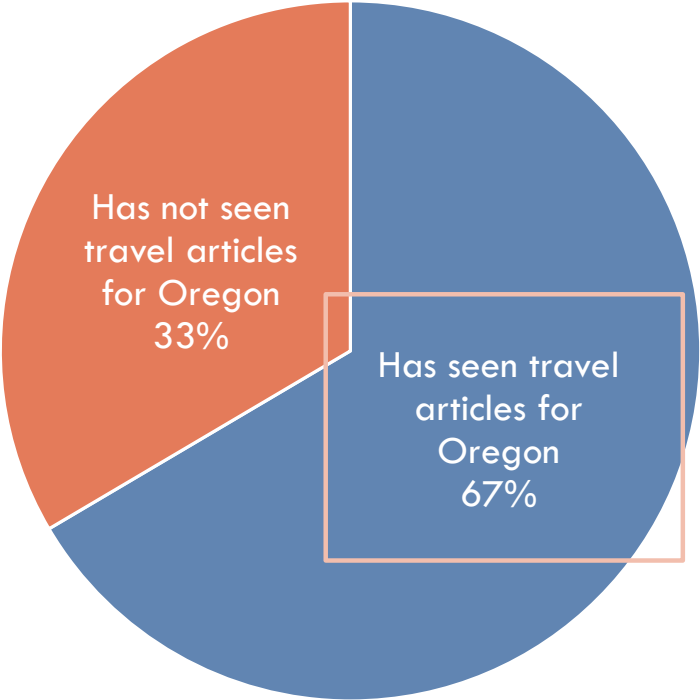
## OREGON ADS

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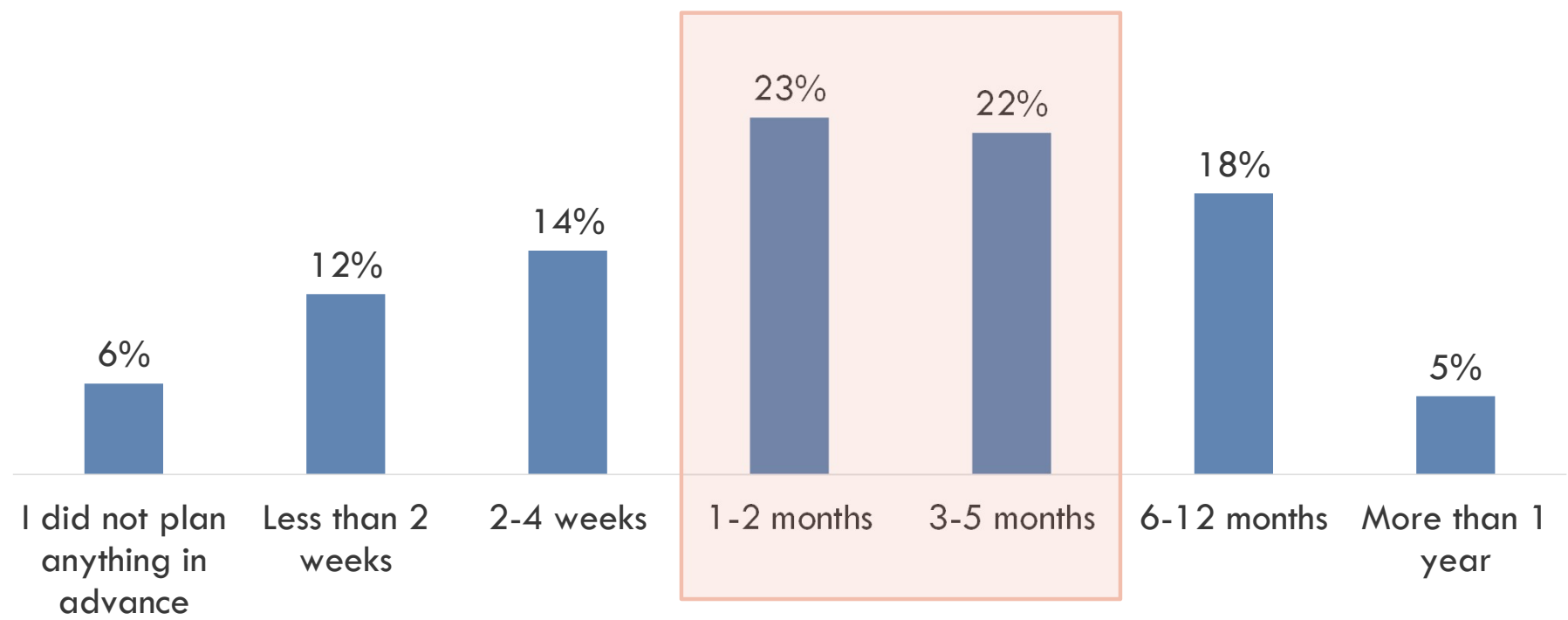


# OREGON ARTICLES

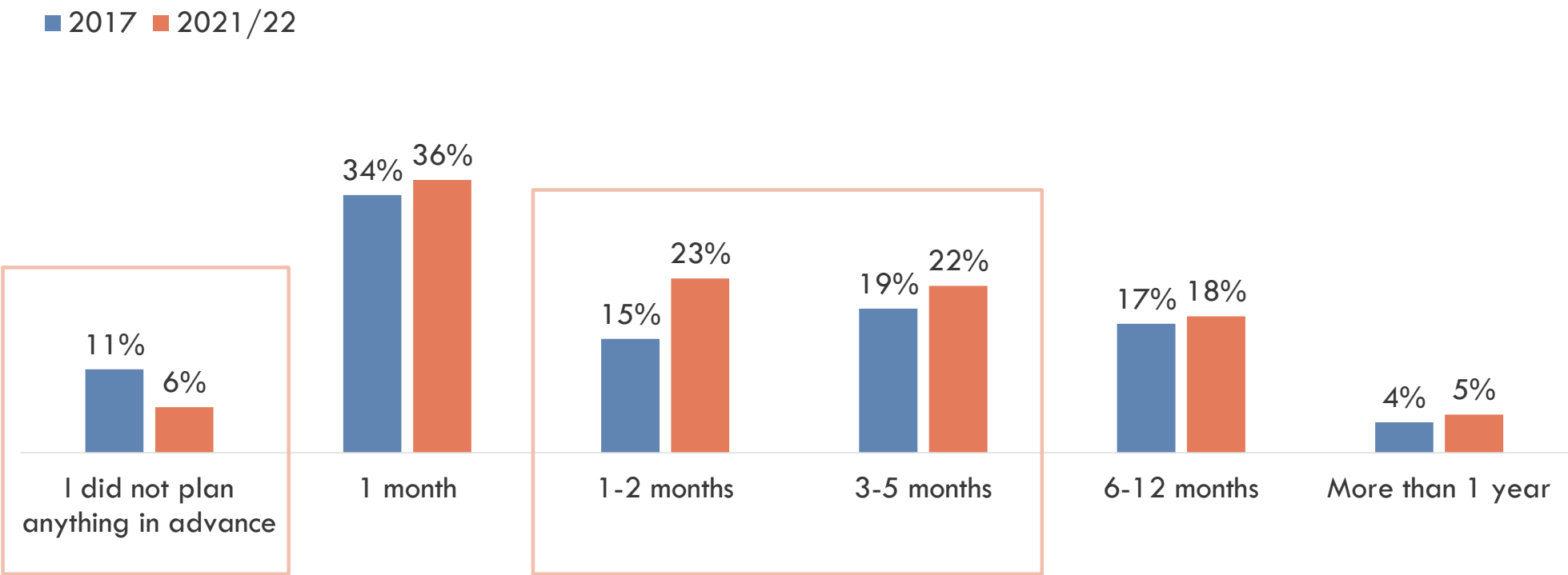
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# PLANNING WINDOW



# PLANNING WINDOW



# **TAKE AWAY**

**Plan media to reach travelers at the most opportune time and place.**

# LEARNING 7

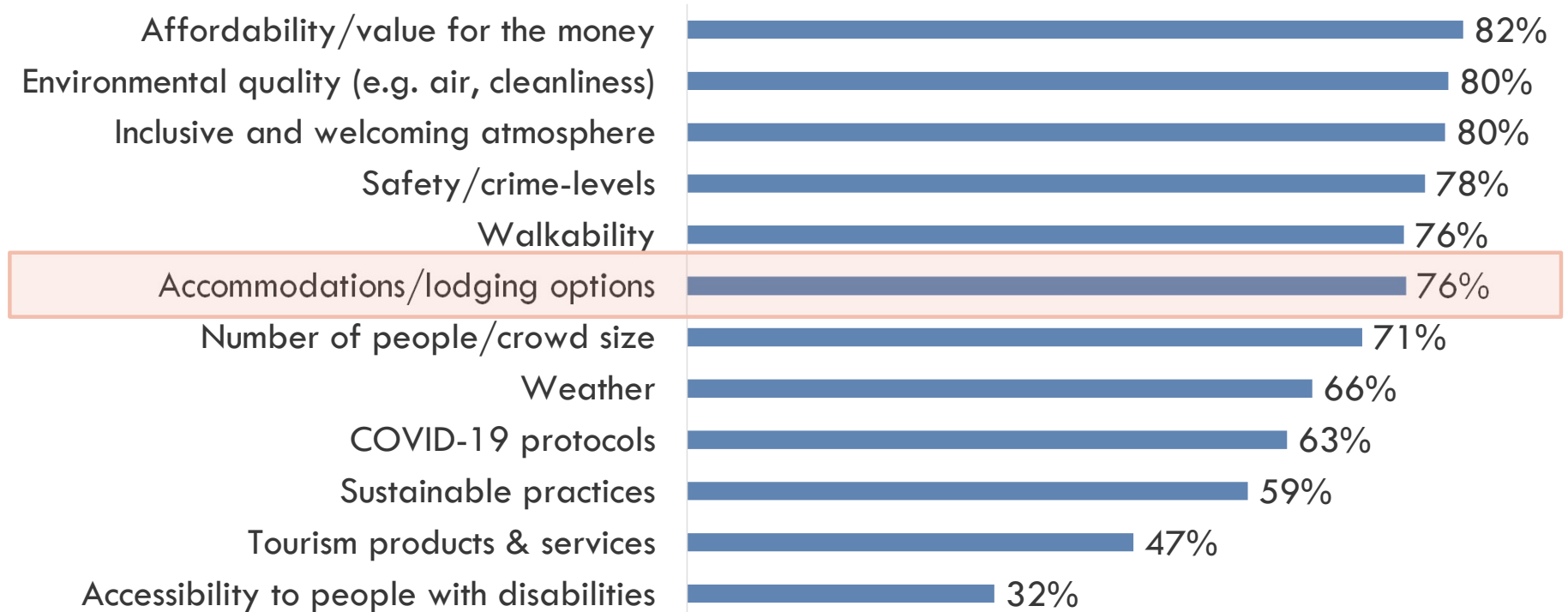
**Structural factors are important.**



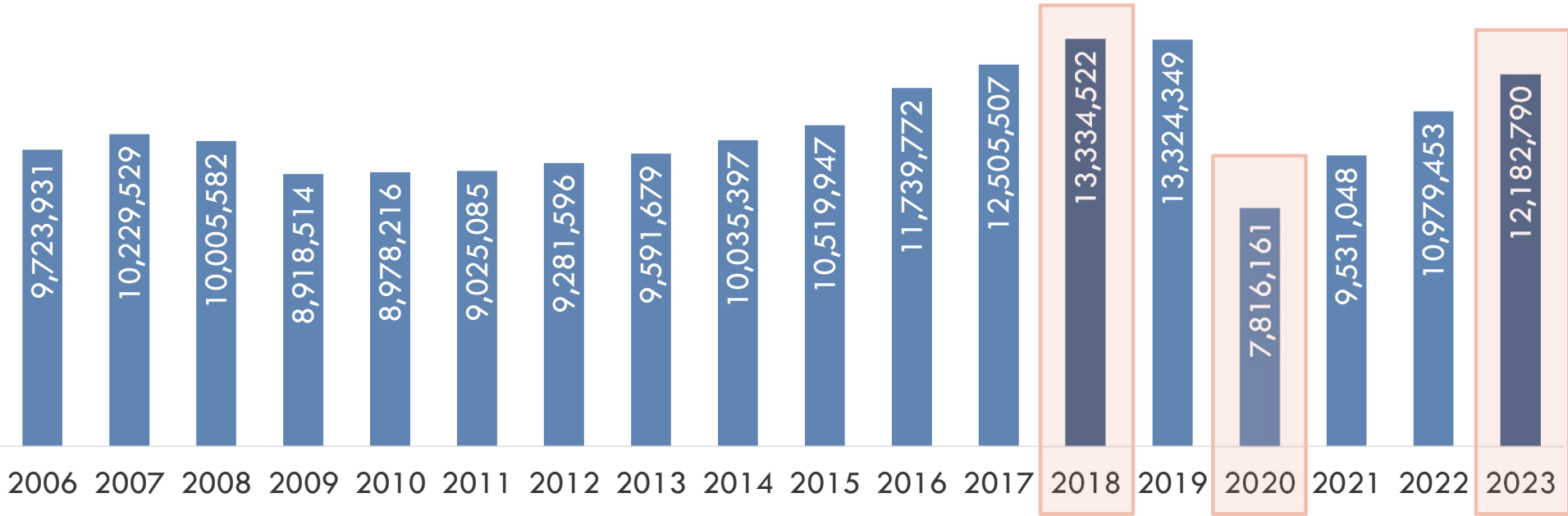
## BARRIERS



## DESTINATION SELECTION FACTORS



# NONSTOP AIR SEATS TO OREGON



## TOP 10 AIR MARKETS TO OREGON

| Nonstop Scheduled Air Seats | 2007    | 2022      | Percent Change | Volume Change |
|-----------------------------|---------|-----------|----------------|---------------|
| Seattle, WA, US             | 842,997 | 1,509,043 | 79%            | 666,046       |
| Denver, CO, US              | 608,724 | 1,039,682 | 71%            | 430,958       |
| San Francisco, CA, US       | 763,329 | 898,641   | 18%            | 135,312       |
| Los Angeles, CA, US         | 604,487 | 792,138   | 31%            | 187,651       |
| Las Vegas, NV, US           | 561,199 | 723,364   | 29%            | 162,165       |
| Phoenix, AZ, US             | 600,165 | 659,693   | 10%            | 59,528        |
| Salt Lake City, UT, US      | 473,588 | 516,899   | 9%             | 43,311        |
| San Jose, CA, US            | 437,922 | 461,237   | 5%             | 23,315        |
| Dallas/Fort Worth, TX, US   | 198,358 | 440,636   | 122%           | 242,278       |
| Oakland, CA, US             | 481,486 | 426,735   | -11%           | -54,751       |

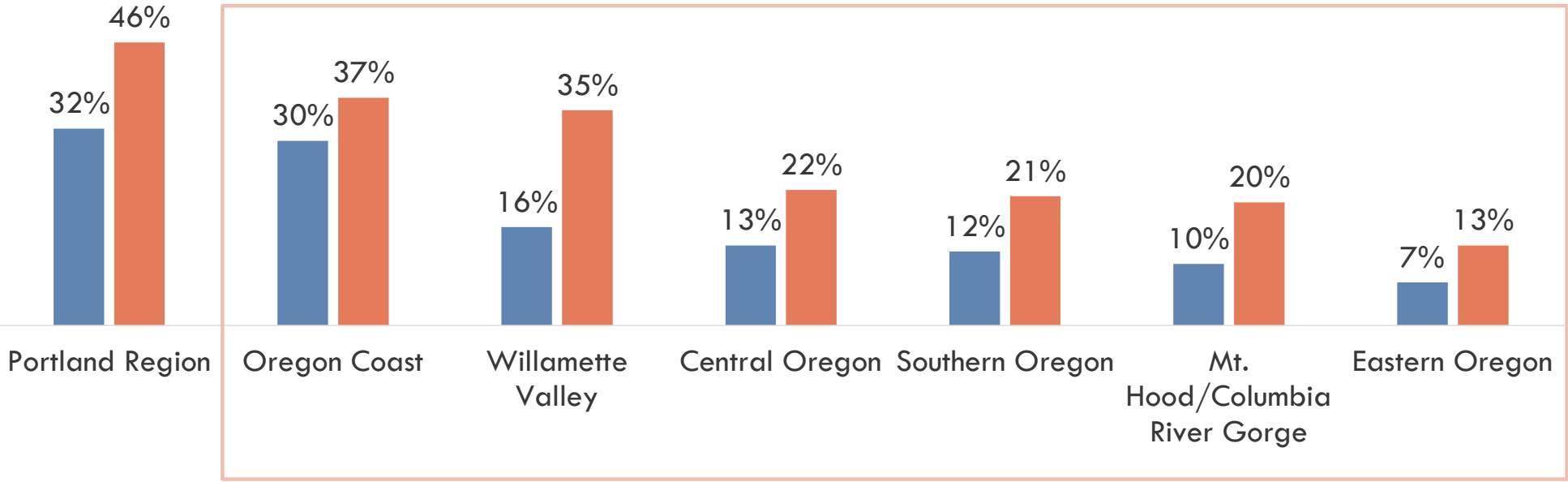
## DESTINATION AIRPORTS IN OREGON

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| Nonstop Scheduled Air Seats | 2007      | 2022      | Percent Change | Volume Change |
|-----------------------------|-----------|-----------|----------------|---------------|
| Portland, OR, US            | 9,271,832 | 9,921,035 | 7%             | 649,203       |
| Eugene, OR, US              | 383,208   | 992,738   | 159%           | 609,530       |
| Redmond/Bend, OR, US        | 210,387   | 691,523   | 229%           | 481,136       |
| Medford, OR, US             | 320,902   | 550,132   | 71%            | 229,230       |

# REGION VISITED BY YEAR

■ 2017 ■ 2021/22



# TAKE AWAY

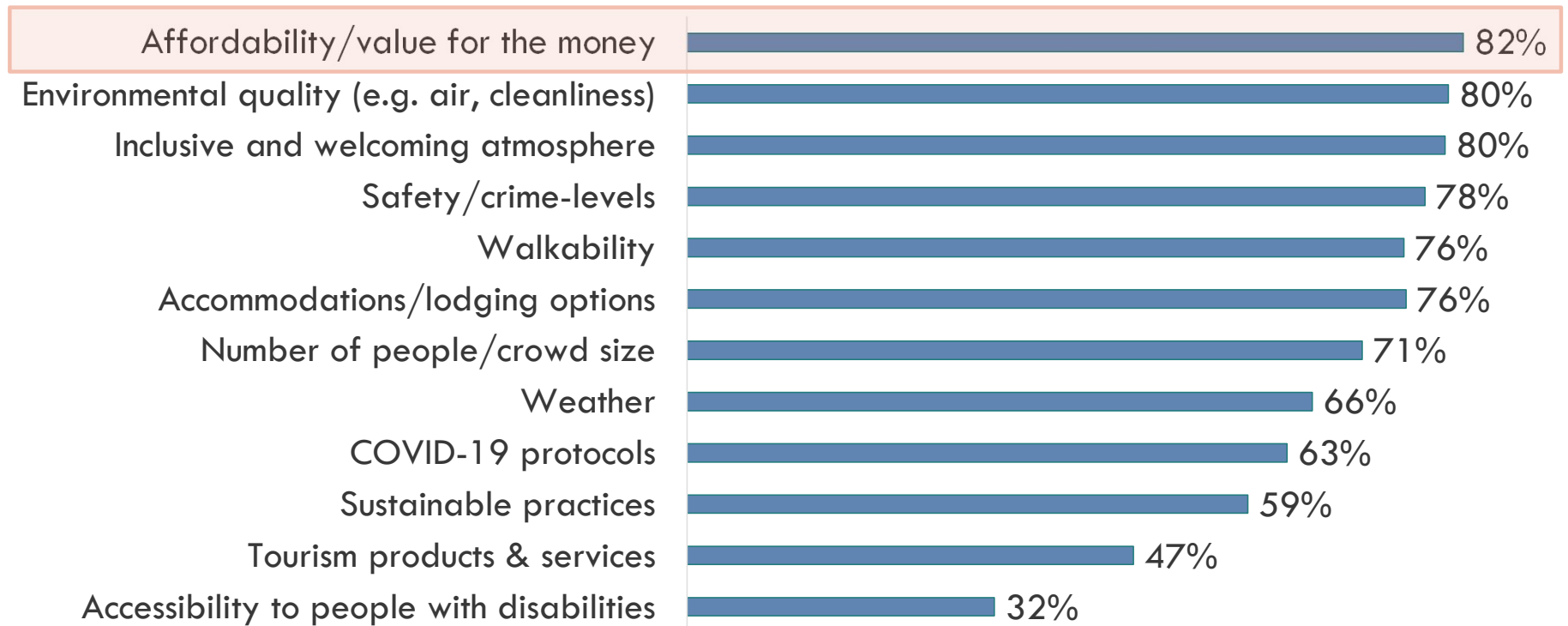
**Support development across the state to encourage an equitable visitor economy.**

# LEARNING 8

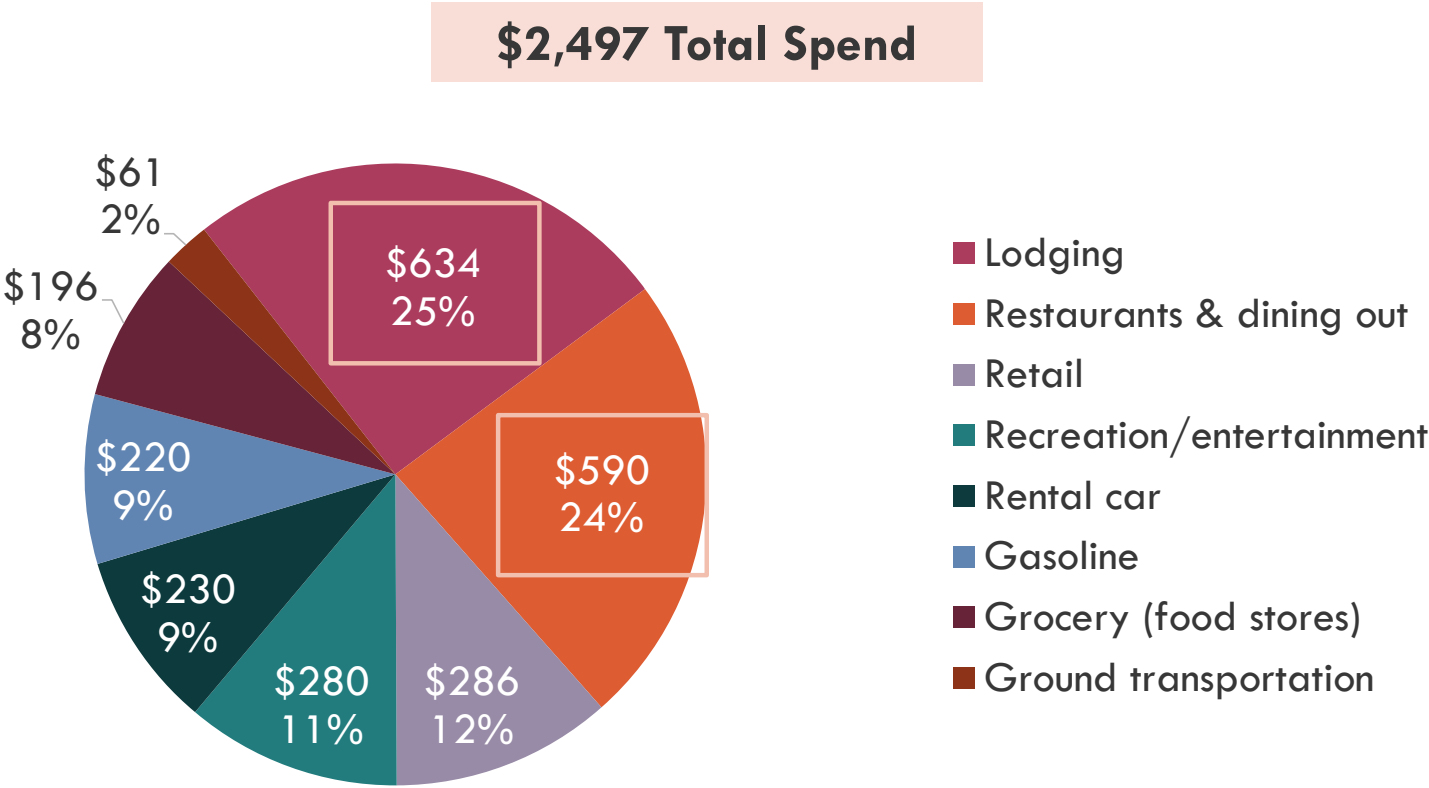
Value is key.



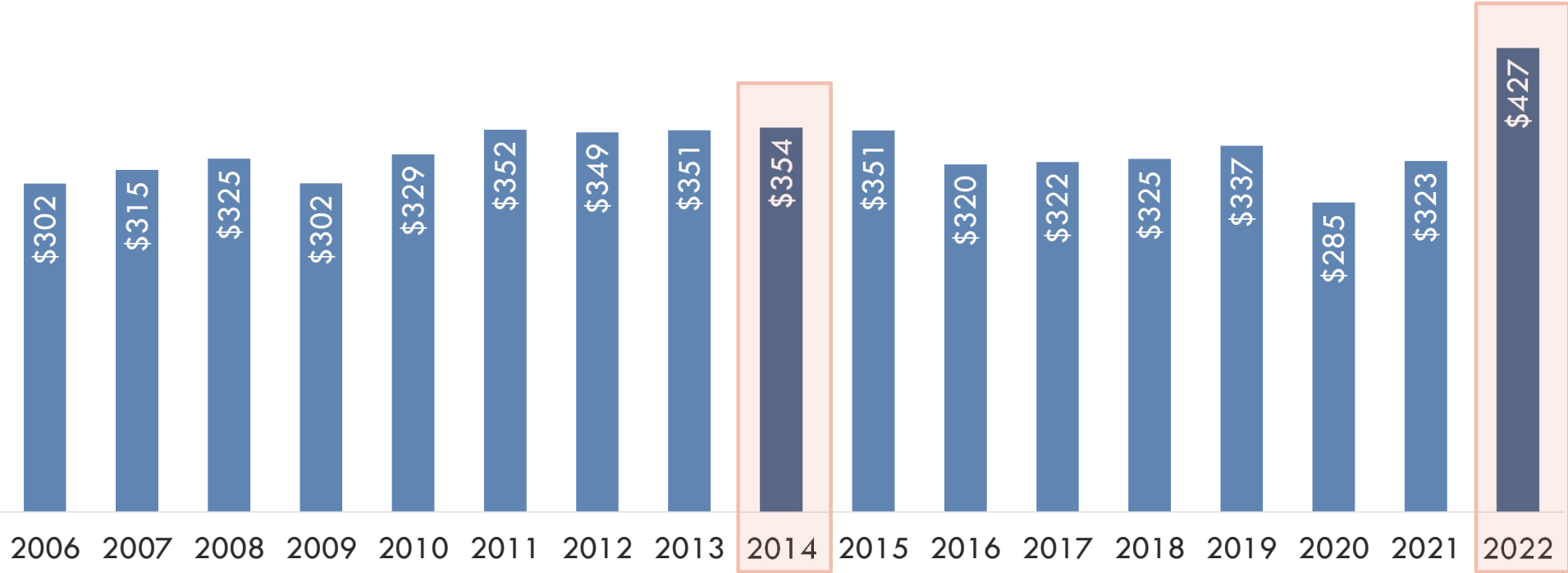
## DESTINATION SELECTION FACTORS



# PER PARTY PER TRIP SPEND

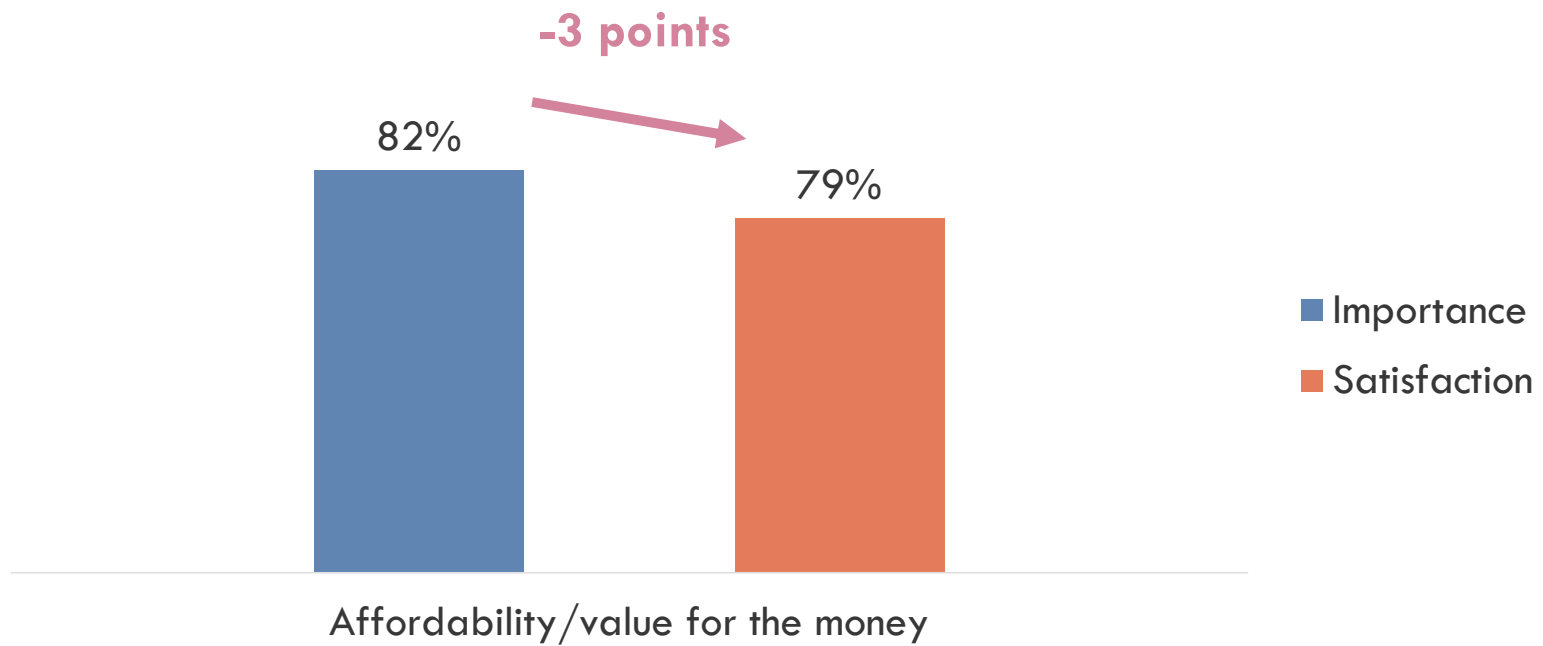


# AIRFARE TO OREGON



## IMPORTANCE VS SATISFACTION – VALUE

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## BARRIERS



$$\text{VALUE} = \frac{\text{QUALITY}}{\text{COST}}$$

# **TAKE AWAY**

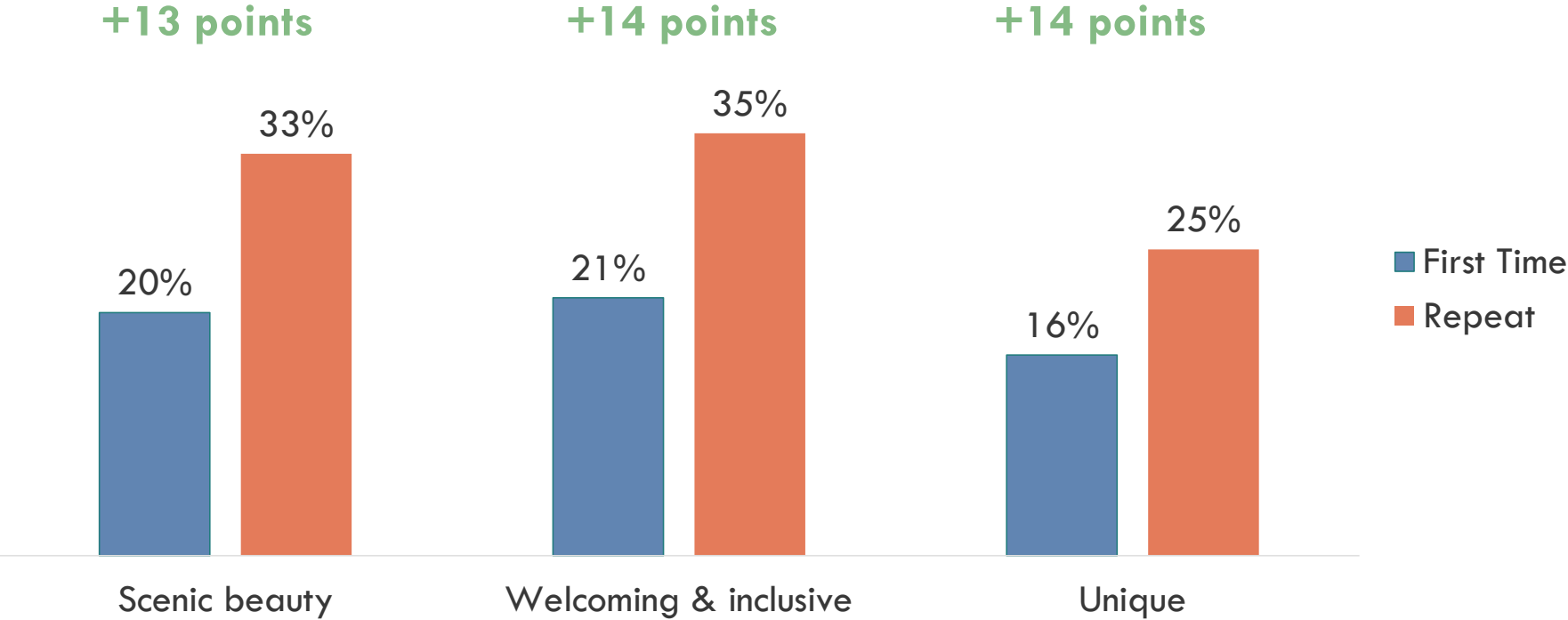
**Maintain value proposition for visitors.**

# LEARNING 9

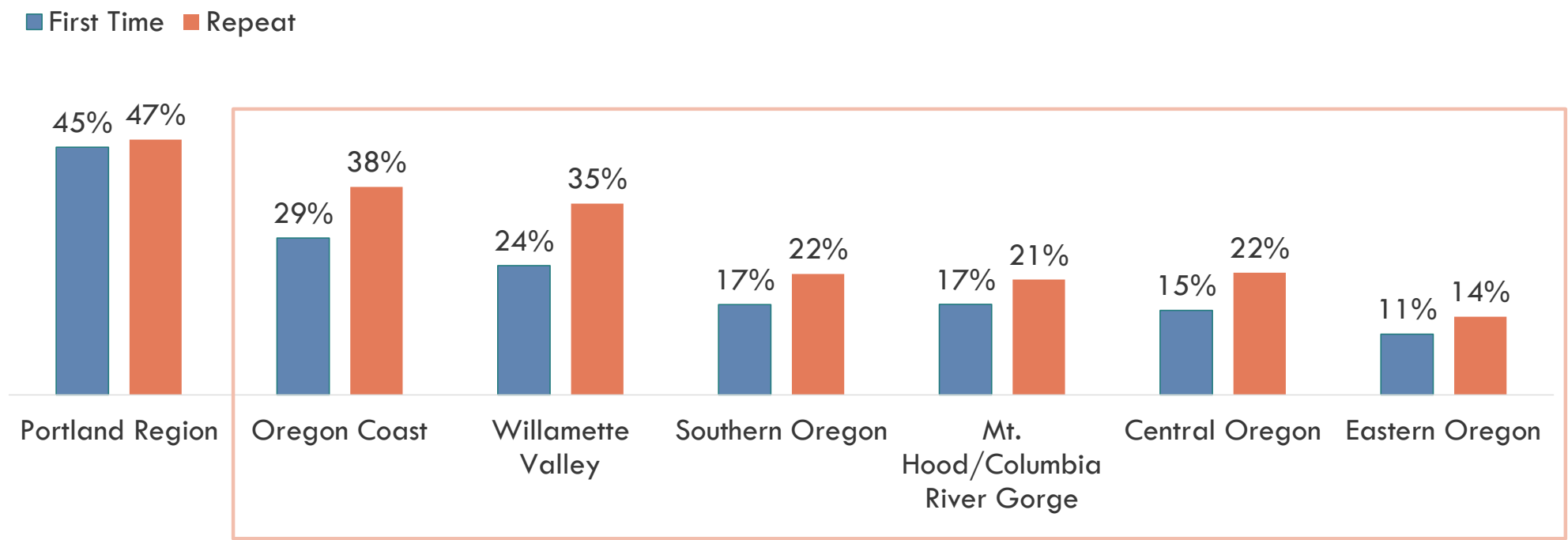
Find the optimal visitor mix.



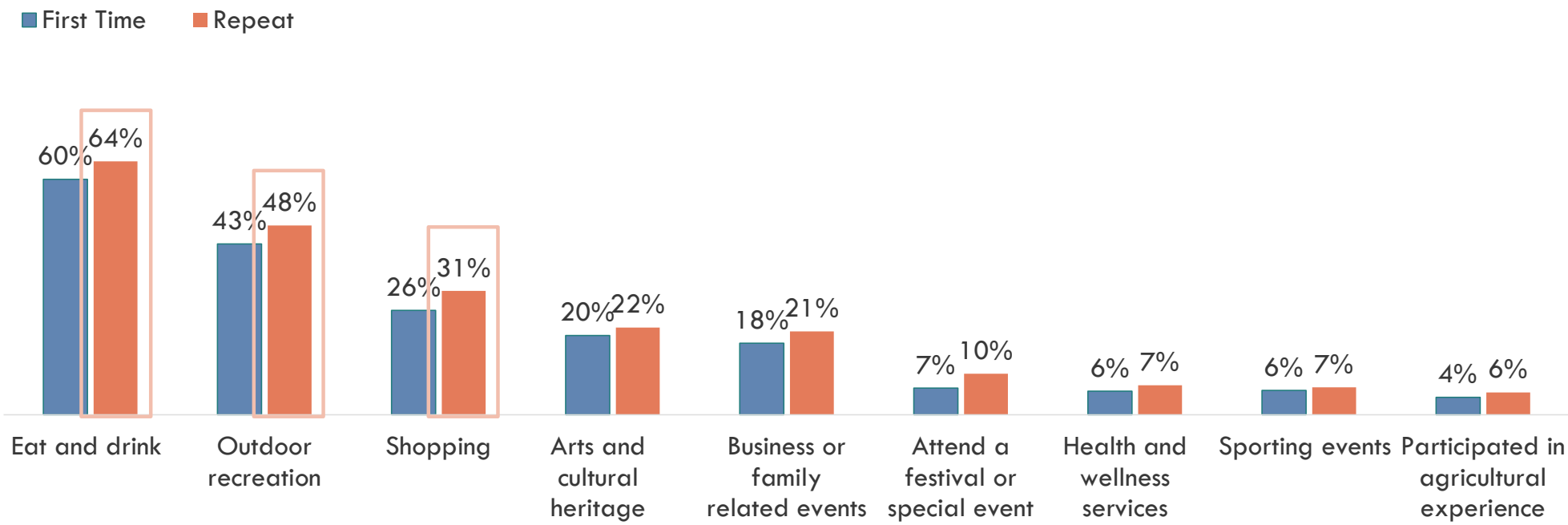
# OREGON PERCEPTIONS



# REGIONS VISITED

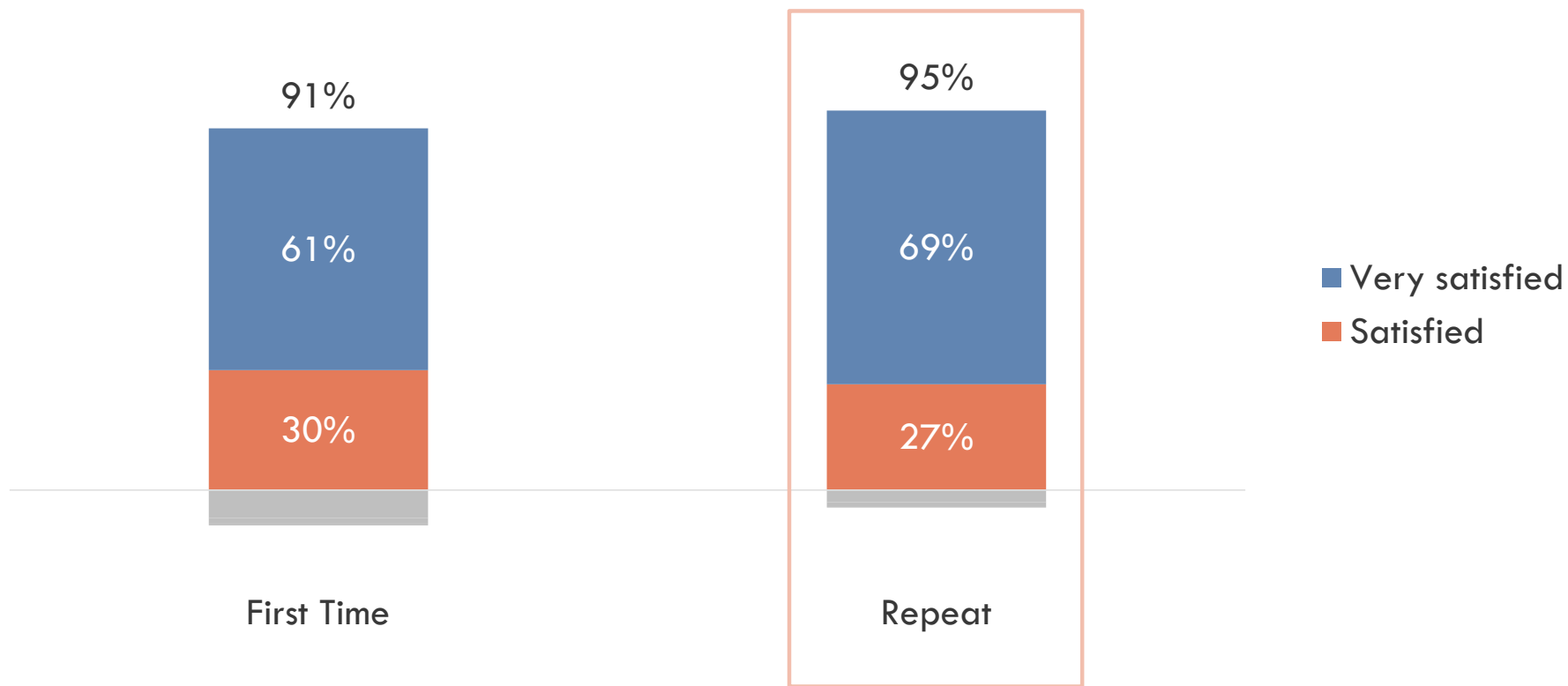


# ACTIVITIES

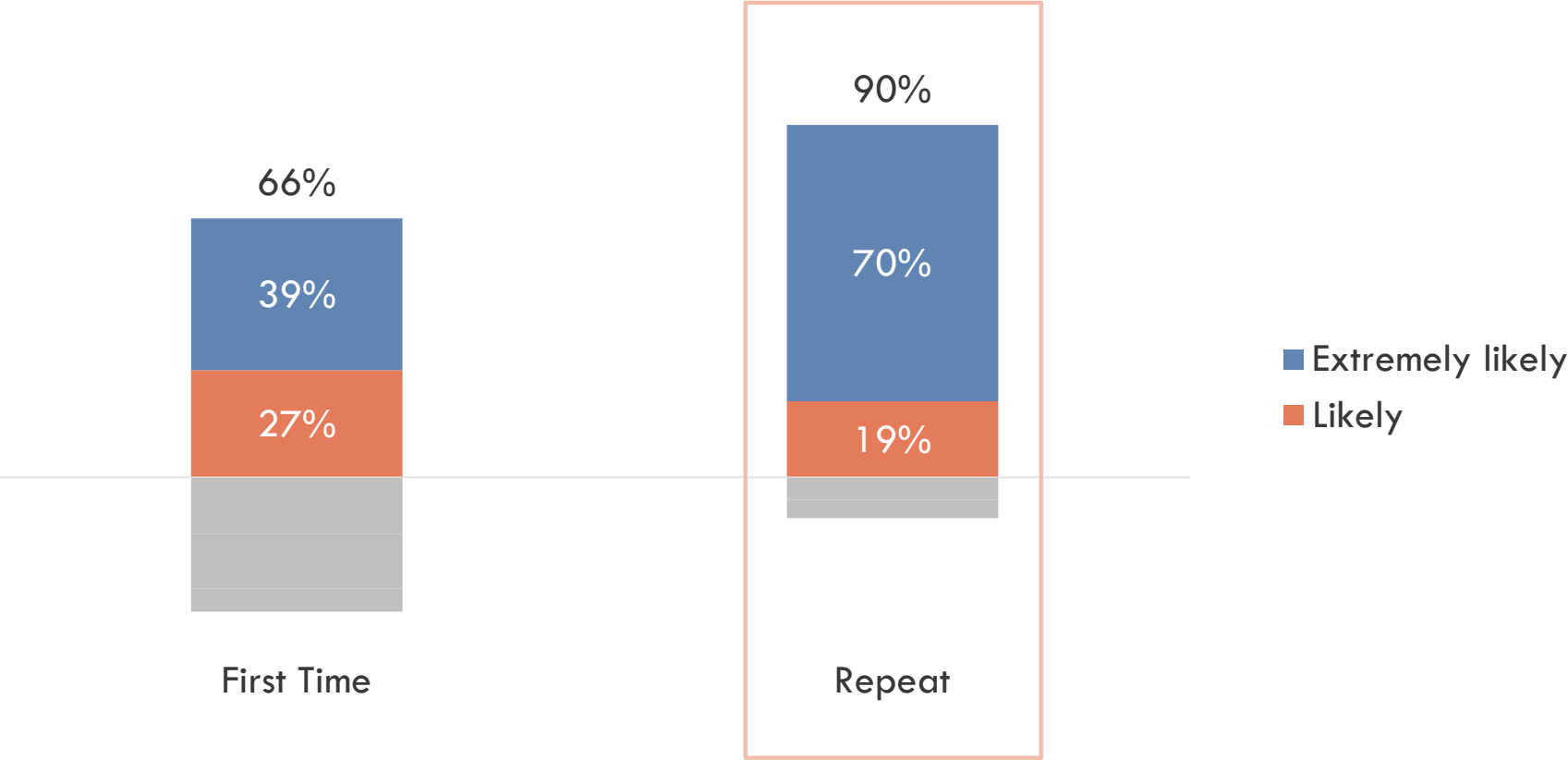


# SATISFACTION

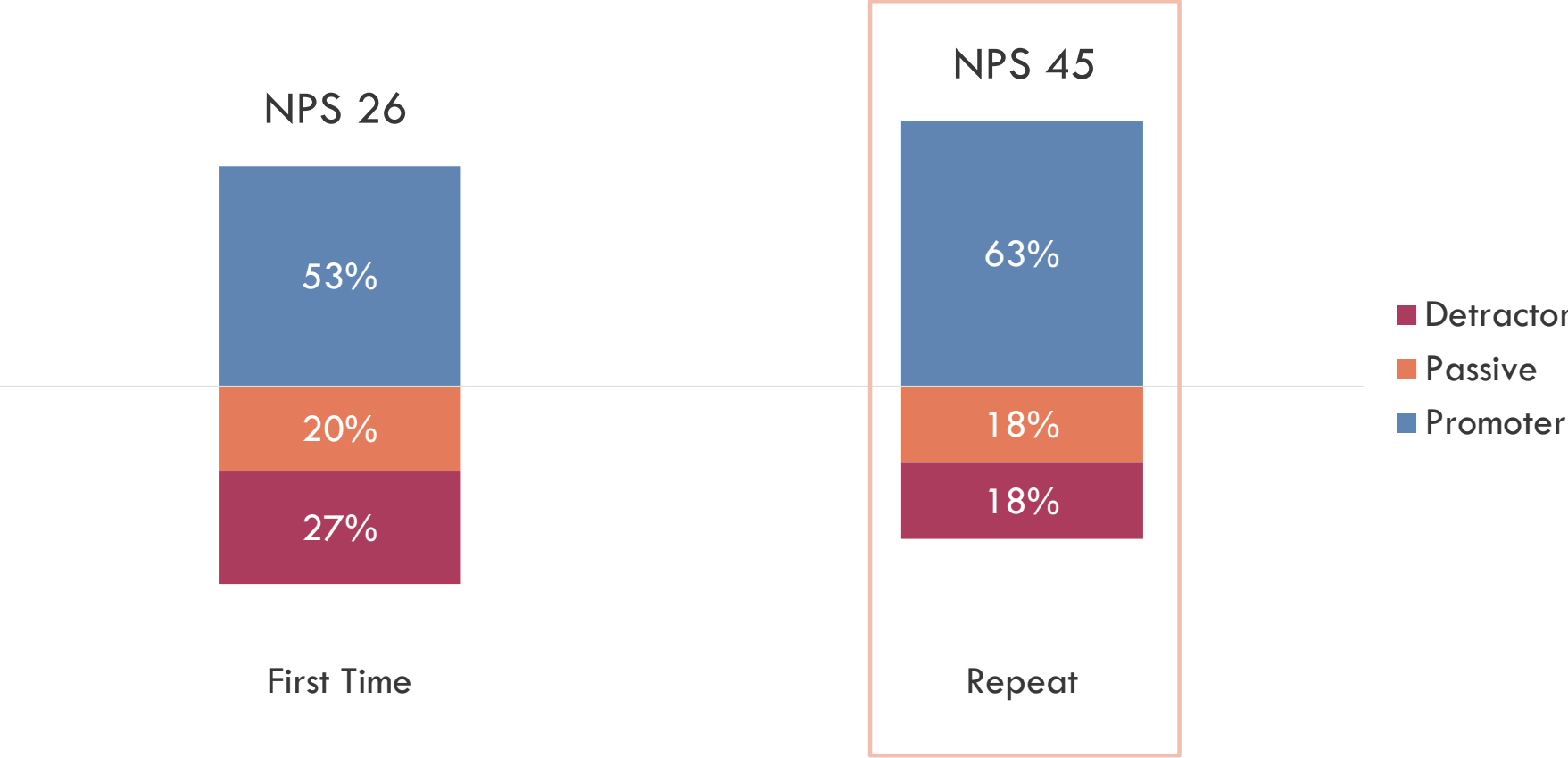
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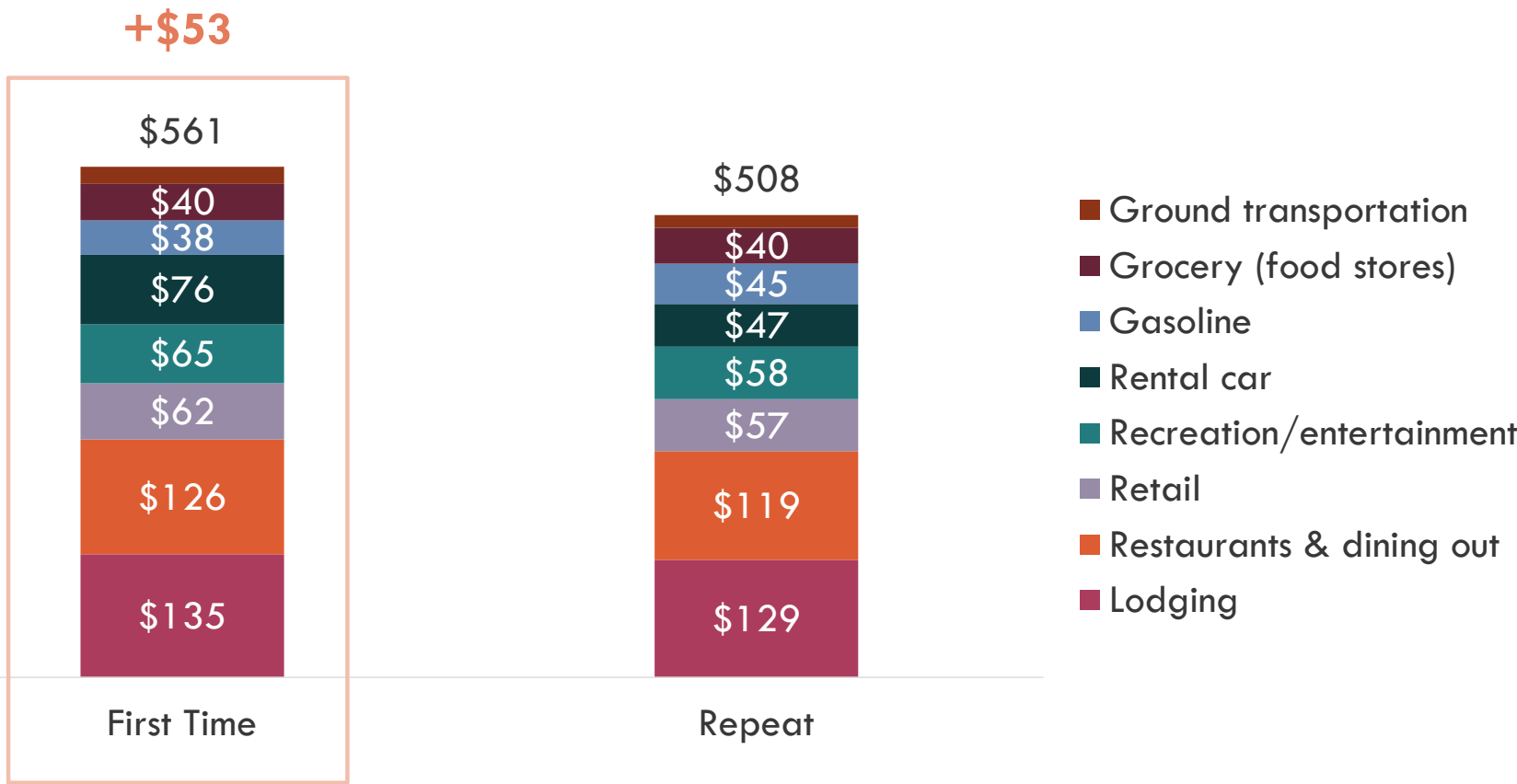
# LIKELIHOOD TO RETURN



# LIKELIHOOD TO RECOMMEND



# PER PARTY PER DAY SPEND



# TAKE AWAY

**Repeat visitors are the foundation; first time visitors are the opportunity.**

# Questions?



Destination  Analysts

