Oregon 2015
Regional Visitor Report
The Willamette Valley Region
Introduction

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

It is currently the largest ongoing study ever conducted of American travelers, providing our clients with more reliable data and greater ability to home in on key market segments of interest.

This report provides:

- Estimates of 2015 overnight visitor volume and travel expenditures for Oregon as well as for the Willamette Valley Region in particular
- Strategic intelligence about the Willamette Valley Region’s overnight travel market including:
  - Key sources of business
  - Visitor profiling
  - Trip characteristics
For each of the 2014 and 2015 travel years, a representative sample of visitors to the Willamette Valley Region was identified through Travel USA®.

Respondents who visited Oregon were asked to identify with of the state’s 7 tourism regions they spent time in with the aid of a visual map.

Of the survey sample of 8,031 overnight trips taken to Oregon in 2014 and 2015:

- 1,046 included a visit to the Willamette Valley Region
- Of those, 371 were marketable trips
The results of this report are based on two time frames:

- Market size and structure estimates for the Willamette Valley Region are reported for the 2015 travel year, as are all Oregon state norms.

- To maximize statistical reliability, other Willamette Valley Region data (trip characteristics and visitor profiles) are based on two years’ combined sample from 2014 and 2015 unless otherwise indicated.
Travel Market Size & Structure
- 2015
Size of the Willamette Valley Region’s Overnight Travel Market

Total Overnight Trips to Oregon* = 33.1 Million

Spent Time in the Willamette Valley Region 16%

5.3 Million

*Includes both adults and children
The Willamette Valley Region’s Overnight Travel Market — Adults vs. Children

Total Overnight Trips to the Willamette Valley Region = 5.3 Million

- Adults: 79% (4.2 Million)
- Children: 21% (1.1 Million)
The Willamette Valley Region’s Overnight Travel Market - by Trip Purpose

- **Marketable**: 40%
- **VFR**: 53%
- **Business**: 7%

*Marketable includes Business-Leisure*
The Willamette Valley Region vs. Oregon State – by Trip Purpose

Base: 2015 Overnight Trips

Visits to Friends/Relatives
- Willamette Valley: 53%
- Oregon 2015: 41%

Marketable Trips
- Willamette Valley: 51%
- Oregon 2015: 40%

Business
- Willamette Valley: 7%
- Oregon 2015: 8%

*Marketable includes Business-Leisure
2015 Overnight Spending — by Sector

2015 Willamette Valley Region Spending = $706 Million

- Lodging: 30% ($211 Million)
- Restaurant Food & Beverages: 27% ($189 Million)
- Retail: 19% ($135 Million)
- Transportation: 15% ($109 Million)
- Recreation: 9% ($62 Million)

Average Per Person Expenditures on Overnight Trips — By Sector

Base: Total Overnight Person-Trips

<table>
<thead>
<tr>
<th>Sector</th>
<th>Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging</td>
<td>$31</td>
</tr>
<tr>
<td>Restaurant Food &amp; Beverage</td>
<td>$27</td>
</tr>
<tr>
<td>Retail Purchases</td>
<td>$20</td>
</tr>
<tr>
<td>Transportation at Destination</td>
<td>$16</td>
</tr>
<tr>
<td>Recreation/ Sightseeing/ Entertainment</td>
<td>$9</td>
</tr>
</tbody>
</table>
Average Per Person Expenditures on Overnight Marketable Trips — By Sector

Base: 2015 Overnight Marketable Trips

- **Lodging**: $36
- **Restaurant Food & Beverage**: $26
- **Retail Purchases**: $16
- **Recreation/Sightseeing/Entertainment**: $14
- **Transportation at Destination**: $12
Marketable Trip Characteristics and Visitor Profile – 2014/2015
## Main Purpose of Marketable Trip — The Willamette Valley Region vs. State Norm

**Base: Overnight Marketable Person-Trips**

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Willamette Valley</th>
<th>Oregon 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoors</td>
<td>28</td>
<td>23</td>
</tr>
<tr>
<td>Special event</td>
<td>25</td>
<td>15</td>
</tr>
<tr>
<td>Touring</td>
<td>27</td>
<td>23</td>
</tr>
<tr>
<td>City trip</td>
<td>13</td>
<td>11</td>
</tr>
<tr>
<td>Resort</td>
<td>10</td>
<td>7</td>
</tr>
<tr>
<td>Casino</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>Golf Trip</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Theme park</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Skiing/Snowboarding</td>
<td>&lt;1</td>
<td>2</td>
</tr>
</tbody>
</table>

**Percent**
State Origin Of Overnight Trip

Base: Overnight Marketable Person-Trips

- Oregon: 53%
- California: 13%
- Washington: 11%
- Arizona: 2%
- New York: 2%

Percent
DMA Origin Of Overnight Trip

Base: Overnight Marketable Person-Trips

- Portland, OR: 29
- Eugene, OR: 21
- Seattle-Tacoma, WA: 7
- San Francisco-Oakland-San Jose, CA: 6
- Medford-Klamath Falls, OR/CA: 5
- Phoenix, AZ: 2
- Yakima, WA: 2

Percent
Other Oregon Regions Visited on Willamette Valley Region Trip

Base: Overnight Marketable Person-Trips

- Greater Portland: 25%
- Coast Region: 24%
- Mt. Hood/Columbia River Gorge: 16%
- Central Region: 13%
- Southern Region: 12%
- Eastern Region: 6%
Season of Trip

Base: Overnight Marketable Person-Trips

- January - March: Willamette Valley 21, Oregon 22
- April - June: Willamette Valley 28, Oregon 25
- July - September: Willamette Valley 33, Oregon 31
- October - December: Willamette Valley 18, Oregon 22
Past Visitation*

Base: Overnight Marketable Person-Trips

- **Ever**: 76% Willamette Valley, 85% Oregon 2015
- **Past Year**: 66% Willamette Valley, 75% Oregon 2015

*New in 2015, data is from 2015 only*
Length of Trip Planning*

Base: Overnight Marketable Person-Trips

- More than 1 year in advance: 4%
- 6-12 months: 18%
- 3-5 months: 19%
- 2 months: 17%
- 1 month or less: 31%
- Did not plan anything in advance: 13%

*New in 2015, data is from 2015 only
Trip Planning Information Sources*

Base: Overnight Marketable Person-Trips

<table>
<thead>
<tr>
<th>Information Source</th>
<th>Willamette Valley</th>
<th>Oregon 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advice from relatives or friends</td>
<td>19</td>
<td>19</td>
</tr>
<tr>
<td>Destination websites</td>
<td>22</td>
<td>22</td>
</tr>
<tr>
<td>Social Media</td>
<td>21</td>
<td>21</td>
</tr>
<tr>
<td>Hotel or resort</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>Airline/commercial carrier</td>
<td>17</td>
<td>17</td>
</tr>
<tr>
<td>Online travel agencies</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Travel company websites</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>Lodging sharing websites</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Travel guide/other books</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>

*New in 2015, data is from 2015 only
**Trip Planning Information Sources**

(Cont’d)

Base: Overnight Marketable Person-Trips

<table>
<thead>
<tr>
<th>Source</th>
<th>Willamette Valley</th>
<th>Oregon 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto club/AAA</td>
<td>7</td>
<td>11</td>
</tr>
<tr>
<td>Travel Agent/Company</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>Visitors' bureau/gov tourism office</td>
<td>6</td>
<td>9</td>
</tr>
<tr>
<td>800/888 number</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>Magazine articles/ad</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>Newspaper articles/ad</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>TV program/ad</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Travel/ski show or exhibition</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Radio show/ad</td>
<td>1</td>
<td>4</td>
</tr>
</tbody>
</table>

*New in 2015, data is from 2015 only
Method of Booking Trip*

Base: Overnight Marketable Person-Trips

*New in 2015, data is from 2015 only
Method of Booking Trip* (Cont’d)

Base: Overnight Marketable Person-Trips

- **Travel Agent/Company**: 3% Willamette Valley, 6% Oregon 2015
- **Visitors' bureau/gov…**: 2% Willamette Valley, 4% Oregon 2015
- **Travel/ski show or exhibition**: 1% Willamette Valley, 2% Oregon 2015
- **Travel guide/other books**: 1% Willamette Valley, 4% Oregon 2015
- **Radio show/ad**: 1% Willamette Valley, 3% Oregon 2015
- **Newspaper articles/ad**: 1% Willamette Valley, 3% Oregon 2015
- **TV program/ad**: <1% Willamette Valley, 3% Oregon 2015
- **Magazine articles/ad**: <1% Willamette Valley, 3% Oregon 2015

*New in 2015, data is from 2015 only*
Devices Used for Trip Planning*

Base: Overnight Marketable Person-Trips

Home (desktop) computer
Laptop
Tablet
Smartphone
None of these

Percent

Willamette Valley
Oregon 2015

*New in 2015, data is from 2015 only
Devices Used During Trip*

Base: Overnight Marketable Person-Trips

*New in 2015, data is from 2015 only
Total Nights Away on Trip

Average
Willamette Valley Region = 4.0 Nights

Average
Oregon = 4.3 Nights

Base: Overnight Marketable Person-Trips

<table>
<thead>
<tr>
<th>Night Range</th>
<th>Willamette Valley</th>
<th>Oregon 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 night</td>
<td>26</td>
<td>22</td>
</tr>
<tr>
<td>2 nights</td>
<td>26</td>
<td>26</td>
</tr>
<tr>
<td>3-4 nights</td>
<td>23</td>
<td>23</td>
</tr>
<tr>
<td>5-6 nights</td>
<td>16</td>
<td>11</td>
</tr>
<tr>
<td>7+ nights</td>
<td>15</td>
<td>9</td>
</tr>
</tbody>
</table>

Percent of trips by night range.
Number of Nights Spent in the Willamette Valley Region

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

Average Nights Spent in the Willamette Valley Region = 2.4

- 1 night: 42
- 2 nights: 28
- 3-4 nights: 21
- 5-6 nights: 4
- 7+ nights: 5

Percent
Size of Travel Party

Base: Overnight Marketable Person-Trips

Willamette Valley
- Adults: 2.3
- Children: 0.6
- Total = 2.9

Oregon
- Adults: 2.5
- Children: 0.8
- Total = 3.3

Average No. of People
- Adults
- Children
Transportation

Base: Overnight Marketable Person-Trips

Personal Vehicles

- Own car/truck
- Rental car
- Camper, R.V
- Bicycle
- Motorcycle

Commercial Vehicles

- Plane
- Bus
- Train
- Traditional Taxi Cab
- Online Taxi Service*
- Ship/Boat

*Category added in 2015, data is from 2015 only

Percent

Willamette Valley
Oregon 2015

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

Base: Overnight Marketable Person-Trips

- Hotel/Motel: Willamette Valley 57, Oregon 2015 58
- Campground/trailer park/RV park: Willamette Valley 18, Oregon 2015 24
- Friend/relative's dwelling (not paid): Willamette Valley 11, Oregon 2015 16
- Bed & breakfast: Willamette Valley 7, Oregon 2015 8
- Country inn/lodge: Willamette Valley 6, Oregon 2015 7
- Rented home/condo/apartment: Willamette Valley 5, Oregon 2015 8
- Rented cottage/cabin: Willamette Valley 3, Oregon 2015 7
- Own home/condo/apartment/cabin: Willamette Valley 2, Oregon 2015 4
- Boat/cruise ship: Willamette Valley 2, Oregon 2015 3
- Time share: Willamette Valley 1, Oregon 2015 6
- Other: Willamette Valley 6, Oregon 2015 4

Percent

Willamette Valley
Oregon 2015
Activities and Experiences

Base: Overnight Marketable Person-Trips

Shopping: 29% (Willamette Valley), 34% (Oregon 2015)
Hiking/Backpacking: 21% (Willamette Valley), 24% (Oregon 2015)
Fine Dining: 22% (Willamette Valley), 24% (Oregon 2015)
Camping: 17% (Willamette Valley), 20% (Oregon 2015)
National/State Park: 20% (Willamette Valley), 26% (Oregon 2015)
Landmark/Historic Site: 20% (Willamette Valley), 20% (Oregon 2015)
Beach/Waterfront: 17% (Willamette Valley), 24% (Oregon 2015)
Swimming: 14% (Willamette Valley), 17% (Oregon 2015)
Winery: 10% (Willamette Valley), 16% (Oregon 2015)
Fishing: 10% (Willamette Valley), 13% (Oregon 2015)
Brewery: 11% (Willamette Valley), 11% (Oregon 2015)
Casino: 10% (Willamette Valley), 13% (Oregon 2015)
Museum: 10% (Willamette Valley), 13% (Oregon 2015)
Fair/Exhibition/Festival: 8% (Willamette Valley), 17% (Oregon 2015)
Bar/Disco: 10% (Willamette Valley), 13% (Oregon 2015)
Activities and Experiences (Cont’d)

Base: Overnight Marketable Person-Trips

- Art Gallery
- Biking
- Theater
- Pro/College Sports
- Spectator at amateur/youth sports
- Attended/participated in kids sports
- Rock/Pop Concert
- Participated in adults sports event
- Spa
- Theme Park
- Boating/Sailing
- Golf
- Dance
- Zoo
- Rafting

Percent

Willamette Valley  Oregon 2015
Activities and Experiences (Cont’d)

Base: Overnight Marketable Person-Trips

- Birding: 3%, 5%
- Mountain Climbing: 3%, 5%
- Skiing: 2%, 4%
- Conference/Convention: 2%, 3%
- Hunting: 2%, 3%
- Glamping*: 1%, 3%
- Rodeo: 1%, 2%
- Business Meeting: 1%, 2%
- Participant in amateur/youth sports: 1%, 2%
- Motorcycle Touring: 1%, 2%
- Symphony: 1%, 2%
- Tennis: 1%, 2%
- Dude Ranch: 1%, 2%
- Trade Show: 0%, 3%
- Opera: 2%

Percent

Willamette Valley
Oregon 2015

*Category added in 2015, data is from 2015 only
Activities of Special Interest

Base: Overnight Marketable Person-Trips

- Historic places
- Cultural activities/attractions
- Winery tours/Wine tasting
- Exceptional culinary experiences
- Family Reunion*
- Brewery Tours/Beer Tasting*
- Eco-Tourism
- Traveling with grandchildren
- Religious Travel*
- Wedding*
- Medical Tourism*

*Category added in 2015, data is from 2015 only
Online Social Media Use by Travelers

Base: Overnight Marketable Person-Trips

- Used any social media for travel: 70%
- Read travel reviews: 37%
- Posted travel photos/video online: 36%
- Looked at travel photos/video online: 28%
- Accessed travel news/events/deals/promotions: 27%
- Read a travel blog: 20%
- Connected with others interested in travel: 16%
- Contributed travel reviews: 14%

Percent: 0 - 80

Willamette Valley vs. Oregon 2015
Online Social Media Use by Travelers (Cont’d)

Base: Overnight Marketable Person-Trips

Used any social media for travel

- Willamette Valley: 70%
- Oregon 2015: 76%

Got travel advice

- Willamette Valley: 11%
- Oregon 2015: 14%

"Followed" a destination/attraction

- Willamette Valley: 9%
- Oregon 2015: 11%

Gave travel advice

- Willamette Valley: 7%
- Oregon 2015: 10%

Subscribed to a travel e-newsletter

- Willamette Valley: 6%
- Oregon 2015: 7%

Blogged about a trip

- Willamette Valley: 3%
- Oregon 2015: 5%

Tweeted about a trip

- Willamette Valley: 3%
- Oregon 2015: 7%
Gender

Base: Overnight Marketable Person-Trips

<table>
<thead>
<tr>
<th>Gender</th>
<th>Willamette Valley</th>
<th>Oregon 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>48</td>
<td>48</td>
</tr>
<tr>
<td>Female</td>
<td>52</td>
<td>52</td>
</tr>
</tbody>
</table>

Percent
Age

Base: Overnight Marketable Person-Trips

Average Age
Willamette Valley Region = 49

18-24 years
- Willamette Valley: 9%
- Oregon 2015: 11%

25-44 years
- Willamette Valley: 30%
- Oregon 2015: 40%

45-64 years
- Willamette Valley: 29%
- Oregon 2015: 36%

65+ years
- Willamette Valley: 25%
- Oregon 2015: 20%

Average Age
Oregon = 46

Percent
Household Size

Average Household Size
Willamette Valley Region = 2.4

Average Household Size
Oregon = 2.8

Base: Overnight Marketable Person-Trips

<table>
<thead>
<tr>
<th>Members</th>
<th>Willamette Valley</th>
<th>Oregon 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 member</td>
<td>18</td>
<td>11</td>
</tr>
<tr>
<td>2 members</td>
<td>19</td>
<td>11</td>
</tr>
<tr>
<td>3 members</td>
<td>15</td>
<td>11</td>
</tr>
<tr>
<td>4 members</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5+ members</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Household Income

Base: Overnight Marketable Person-Trips

Average Household Income
Willamette Valley Region = $65.1K

Average Household Income
Oregon = $63.7K

Percent

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Willamette Valley</th>
<th>Oregon 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $49.9K</td>
<td>44</td>
<td>44</td>
</tr>
<tr>
<td>$50K-$74.9K</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td>$75K-99.9K</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>$100K-$149.9K</td>
<td>19</td>
<td>15</td>
</tr>
<tr>
<td>$150K+</td>
<td>7</td>
<td>4</td>
</tr>
</tbody>
</table>

0 10 20 30 40 50

Percent
Marital Status

Base: Overnight Marketable Person-Trips

Married/With partner
- Willamette Valley: 64%
- Oregon 2015: 66%

Never married
- Willamette Valley: 20%
- Oregon 2015: 21%

Divorced/Widowed/Separated
- Willamette Valley: 16%
- Oregon 2015: 13%
Children in Household

Base: Overnight Marketable Person-Trips

No Children Under 18
- Willamette Valley: 67%
- Oregon 2015: 54%

Any child between 13-17
- Willamette Valley: 15%
- Oregon 2015: 20%

Any child between 6-12
- Willamette Valley: 18%
- Oregon 2015: 25%

Any child under 6
- Willamette Valley: 11%
- Oregon 2015: 17%

Percent

Willamette Valley  Oregon 2015
Education

Base: Overnight Marketable Person-Trips

- **Post-graduate**: Willamette Valley 26%, Oregon 23%
- **College graduate**: Willamette Valley 35%, Oregon 38%
- **Some college**: Willamette Valley 25%, Oregon 24%
- **High school or less**: Willamette Valley 14%, Oregon 13%
- **Other**: Willamette Valley 1%, Oregon 1%

Percentages are shown as a bar chart with the x-axis representing the percent range from 0 to 40, and the y-axis listing the education categories.
Employment

Base: Overnight Marketable Person-Trips

Full-time/Self-employed
- Willamette Valley: 37%
- Oregon 2015: 45%

Part-time
- Willamette Valley: 14%
- Oregon 2015: 11%

Not employed/Retired/Other
- Willamette Valley: 49%
- Oregon 2015: 44%
Race

Base: Overnight Marketable Person-Trips

<table>
<thead>
<tr>
<th>Race</th>
<th>Willamette Valley</th>
<th>Oregon 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>89</td>
<td>84</td>
</tr>
<tr>
<td>African-American</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Other</td>
<td>8</td>
<td>12</td>
</tr>
</tbody>
</table>

Percent
Hispanic Background

Base: Overnight Marketable Person-Trips

Percent

<table>
<thead>
<tr>
<th></th>
<th>Willamette Valley</th>
<th>Oregon 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>95</td>
<td>92</td>
</tr>
<tr>
<td>Yes</td>
<td>5</td>
<td>8</td>
</tr>
</tbody>
</table>
Appendix A: Key Terms Defined
Key Terms Defined

- An **Overnight Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one more nights away from home.

- A **Day Trip** is any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.

- A **Person-Trip** is one trip taken by one visitor
  - *Person-trips are the key unit of measure for this report.*
Trip-Type Segments

**Total Trips = Leisure + Business + Business-Leisure**

- **Leisure Trips:** includes all trips where the main purpose was one of the following:
  - Visiting friends/relatives
  - Touring through a region to experience its scenic beauty, history and culture
  - Outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating
  - Special event, such as a fair, festival, or sports event
  - City trip
  - Cruise
  - Casino
  - Theme park
  - Resort (ocean beach, inland or mountain resort)
  - Skiing/snowboarding
  - Golf Trip

- **Business Trips:** includes
  - Conference/convention
  - Other business trip

- **Business-Leisure:** a trip for business where, on the same trip, the visitor stayed for at least one additional day to experience the same place or nearby area simply for leisure.