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Overnight Visitors to Oregon's Mt. Hood Territory

Clackamas County Tourism Development Council

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Introduction

This report presents the summary of results of a web survey conducted of overnight visitors to Clackamas County, Oregon. The primary purpose of this study was to create a profile of overnight visitors by assessing various trip characteristics. Specific objectives included:

- Identify who visitors are and where they come from
- Examine where visitors stay and how long
- Explore what visitors do while in Clackamas County and what they spend their money on
- Ascertain visitor level of satisfaction with the visit and likelihood of returning and why

Methodology

BNResearch created postcards that were provided to guests at the front desk of the property upon check-in. Front desk personnel briefly informed guests of the study and asked for their participation. Guests either returned the postcard to front desk personnel or mailed it (postage-paid) directly to BNResearch. Invitations to participate in the web survey were emailed and participants were able to complete the surveys at their convenience.

The survey was conducted between May 2004 and September 2005. Approximately 26,500 cards were distributed to hotels, motels, resorts, Bed and Breakfasts and vacation rentals. 1,775 visitors sent back the postcard and were emailed a link to the survey website. 817 respondents completed the survey. The completion rate was 46% for those postcards returned and 3% for all postcards distributed to properties.

Executive Summary

Travel Origin and Visitor Profile

Of all the visitors to Clackamas County, 44% of them are Oregon residents. 20% are Washington residents and 11% are from California. 4% of the visitors are from outside of the U.S.

- Of the Oregon residents, 63% are from the Northwest counties and 23% from the Southwest counties.
- Of the Oregon residents, 44% of them reside in the Portland Metro (Tri-county) area.
- 19% of all visitors are from either Multnomah, Clackamas, or Washington County.

Visitors from the Northwest counties tend to come for vacation and pleasure, be repeat visitors, travel with others and come for sightseeing/shopping and outdoor activities.

Out-of-state visitors are more likely than in-state visitors to come to Clackamas County to visit friends and relatives and be first-time visitors. Out-of-state visitors also tend to spend more nights in Clackamas County and spend more per party per day on their trip than in-state visitors. They also tend to be older and have a higher income than in-state visitors. Also, out-of-state visitors participated in more events and attractions such as visiting parks, museums and going shopping than in-state visitors (4.7 vs. 3.8 average number of events and attractions, respectively).

80% of visitors to Clackamas County were repeat visitors. Repeat visitors tend to be from Oregon, have a shorter advance trip planning time as well as take less time to plan their trip.

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When compared to repeat visitors, first-time visitors tend to spend more nights in Clackamas County (3.4 nights vs. 2.6 for repeat visitors), are primarily from out-of-state and spend more on average per party per day (\$416 vs. \$377 for repeat visitors).

Purpose of Trip

The majority (65%) of visitors were in Clackamas County for leisure purposes, 35% were here for meetings, 3% for business and 1% were with a group. The leisure segment is made up of those who visited Clackamas County for vacation/pleasure or to visit family and friends. The meeting segment consists of those visiting Clackamas County to attend a meeting, convention, conference, reunion or to attend training or seminars. The business segment consists of those visiting Clackamas County to make sales calls. While the sample size for the group segment was very small and therefore not included in the analysis, it includes those on a group, bus or motorcoach tour.

- 25% of the meeting segment and 30% of the business segment visited with friends and relatives while in Clackamas County.
- Almost one-quarter of the leisure segment resides in the Portland metro area..
- The majority of leisure, meeting and business travel segments are repeat visitors.

- Interestingly, 25% of the leisure segment, 12% of the meeting segment and no one in the business segment traveled with children.
- Business and meeting travelers tend to travel alone.

36% of the visitors to Clackamas County visited friends and relatives while in the County. Of these visitors, 19% came primarily to visit friends and relatives and 17% came to Clackamas County to visit friends and relatives as a secondary purpose. Of those who came to visit friends and relatives as a secondary purpose, 51% of them were in Clackamas County for vacation/pleasure, 23% for a meeting/convention/conference and 14% for a reunion.

Visitors who came to Clackamas County primarily to visit friends and relatives tend to be from out-of-state, older and have less income.

Travel Decision

A large portion of travelers (39%) made the decision to take their trip 1 to 3 months ahead of time. Only 2% did no advanced planning and only 9% of the visitors made the decision 7 months or more ahead of time. Visitors who stayed at a vacation rental made the decision to visit further in advance than those who stayed at a full service, limited service or a bed and breakfast.

Once the decision was made to visit Clackamas County, the majority of travelers (60%) took 1 to 6 days to plan their trip. 7% did no advance planning while 2% planned for 7 or more months. Visitors who stayed at bed and breakfasts and vacation rentals took longer to plan their trip than those at full and limited service hotels. The information still unknown is exactly when after the decision was made to visit the actual planning took place.

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The majority of visitors planned their trip by themselves or with a spouse.

- 79% of visitors were involved in planning their trip.
- 35% had their spouse included in the planning.
- Of the visitors involved in the planning, 40% planned their trip solely by themselves.

While most business and meeting travelers planned their trip themselves, they were more likely to use a business associate or corporate travel planner than other segments.

Information Sources

Visitors were asked to identify information sources they used for planning their trip. 56% of the visitors used the internet or an online search to gather information for planning their trip to Clackamas County¹. 34% of the visitors used their own experience and 30% gathered information from their friends and relatives. 11% of visitors did not get travel information at all. First time visitors were more likely to use the internet than repeat visitors in planning their trip.

¹ It should be noted that the methodology used may have skewed the internet data because the survey was done on the web.

- An average of 1.8 sources was used to find travel information.

Visitors were then asked what information source they used the MOST to plan their trip. Again, the internet came out on top with 45% of visitors using it most. 21% relied on their own experience and 13% relied on their friends and relatives. People who stayed 3 or more nights in Clackamas County were more likely to use the internet than those who stayed only one night.

- Internet users tend to have a larger party size (3.0 vs. 2.4) and a higher income than non-internet users.
- Internet users are more likely to be vacationing and to have visited parks and gone hiking than non-internet users.
- Visitors who used the internet used more sources on average (2.4 sources) than the average for all visitors (1.8 sources).

Travel Companions

Most visitors to Clackamas County traveled with someone else. Among adults who visited Clackamas County with someone else, the majority visited with another adult and almost 1 in 5 visited the county with one or more children.

- 22% of the adults traveled alone.
- 78% of the adults traveled with someone else. Of those adults, 3% traveled with children only, 16% traveled with adults and children and 59% traveled with adults only.
- 81% of the visitors traveled with no children.
- 19% traveled with one or more children. Of these visitors, 43% traveled with one child, 37% with two, 10% with three and 10% with four or more.

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The majority of visitors who come to Clackamas County with another person come with a family member (77% vs. 22% with a friend, 7% with a business associate and 3% with other).

- Those who come with children tend to have a larger party size (4.8 vs. 2.3 for those without kids).
- Also, those who come with children tend to spend more per party per day (an average of \$425 vs. \$376 for those without kids).

Visitors who travel to Clackamas County with one or more children are more likely to enjoy outdoor activities such as hiking and skiing compared to those not traveling with children.

Trip Characteristics

Most visitors (74%) travel by car from home to Clackamas County on their trip. 25% travel by air, 13% by rental car and only 1% by train or bus. As to be expected, out-of-state visitors are more likely than in-state visitors to travel by air (44% vs. 1%).

On average, visitors spent one night of their trip outside of Clackamas County. It was also found that out-of-state visitors tend to stay more nights than in-state visitors.

- On average, visitors spent 2.5 nights at their hotel, 2.7 nights in Clackamas County and 3.7 nights on their entire trip.

Visitors participated in or attended an average of 4.3 events or activities while on their trip. The most popular activities enjoyed by Clackamas County visitors are going out to restaurants and nightclubs, shopping, and relaxing and sightseeing.

Activity	% Visitors	Activity	% Visitors
RESTAURANT OR NIGHTCLUB	77%	Other Outdoor	13%
SHOPPING	67%	Golfing	9%
Basic items	54%	VISIT FRIENDS/RELATIVES	36%
Specialty items	41%	ATTENDED EVENTS	28%
RELAX/SIGHTSEE	61%	Visit a museum/historical site	18%
OUTDOOR ACTIVITIES	48%	Attend a fair/festival	8%
Visit a park	29%	Watch or part in sports	6%
Hiking	23%	Cultural event	3%
View Wildlife	15%	VISIT A WINERY OR BREW PUB	13%

Spending

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Visitors spend an average of \$170 per party per day on lodging. They spend an average of \$95 purchasing specialty items per day, \$86 for food and beverage, \$85 for transportation to and from Clackamas County and \$48 on average per party per day for recreation and entertainment.

- The visitors who spend the most per party per day on lodging in Clackamas County were adults with children, those participating in outdoor activities and those visiting in the Summer.
- On average, visitors spend \$385 per party per day. 11% of visitors spend more than \$750 per party per day.
- Those who spend the most on their trip are visitors attending events, visiting wineries or brew pubs, Summer visitors and those without children.

Trip Satisfaction

When asked about their overall satisfaction with their trip to Clackamas County, 4 in 5 visitors are very satisfied, 13% are somewhat satisfied and only 1% are not too satisfied.

- 86% of those who were 'very satisfied' with their trip are also 'very likely' to return.

When asked how likely they are to visit Clackamas County again, 81% respond they are very likely. 51% of first time visitors report being very likely to visit again.

The top 10 reasons for wanting to visit Clackamas County again are:

Reason to Visit Again	% Visitors
Visit friends/family	27%
(Enjoyed) B&B/Hotel	20%
Like the wilderness/mountains/outdoors/scenery	18%
Work/Business reasons	16%
Other activities (fishing, rafting, movies, tram ride, etc.)	12%
Shopping	10%
Mt. Hood Loop (Fruit Loop)	9%
Like area/Oregon	8%
Close to home	7%
(Good) restaurants	3%

Seasonal Markets

Overall, there are noticeable differences in travel patterns between the different seasons.

- Visitors in the Winter season tend to have the largest party size, be from the Northwest counties and have a lower median age than visitors in other seasons.
- Visitors in the Summer season tend to spend more nights in Clackamas County than visitors in other seasons.
- Summer visitors are primarily from out-of-state, tend to spend more per party per day and have a higher than average income.

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Winter visitors tend to be repeat visitors, travel with more kids and go skiing. Summer visitors tend to come for relaxing and sightseeing, visiting parks and attending events and museums.

It should be noted that during the 2004-05 Winter season when the survey was taking place Oregon's Mt. Hood Territory had unusually low snow levels which may have effected the number of visitors and may have skewed the survey data.

Lodging Markets

The majority of all visitors surveyed (57%) stayed at a full service hotel. 23% stayed at a vacation rental, 17% stayed at a limited service hotel and 3% stayed at a B&B. Residents from the Portland metro area were significantly more likely to have stayed at a vacation rental.

- Visitors who stayed at a full or limited service hotel were more likely to be visiting friends and relatives than those who stayed at a B&B or vacation rental.

- Visitors who stay at a vacation rental were more likely to be from in-state and spend more per party per day than visitors who stayed at other lodging types.
- Within each season, the majority stayed at full service hotels with the exception of Spring where slightly more stayed in limited service hotels.
- Full service hotels were the number one choice among all three travel segments.²

The lodging segments were also categorized by those properties along the I-5/I-205 corridor and those in the Mt. Hood area. It was found that one-half of the visitors to the Mt. Hood area reside in one of the thirteen Northwest counties.

- Mt. Hood visitors tend to have a larger party size than those who stay along the I-5/I-205 corridor.
- Mt. Hood visitors participated in or attended an average of 4.3 activities or events while visitors who stayed along the I-5/I-205 corridor participated in or attended an average of 3.9 activities or events.
- Visitors who stayed along the I-5/I-205 corridor were more likely to have visited friends than those who stayed in the Mt. Hood area.

² It should be noted that more full service hotels participated in distributing the survey. Therefore, results may be skewed.

Key Findings and Recommendations

There are many findings and implications that can be gathered from all of the data. Below is a list of the main findings.

- There are variations within the county in several areas:
 - ✓ By geographical location – sub-regions, i.e. Mt Hood area, I-5 / I-205 area
 - ✓ By season trip was taken
 - ✓ By trip purpose
 - ✓ By visitors' home/origin
- Visiting Friends and Relatives as a primary or secondary purpose of the trip is a significant trip generator.
 - ✓ CCTDC can reach a notable percent of visiting the family and friends segment through the county's own residents.
- Repeat visitors are at an acceptable percent of the total visitor base. Most marketers strive for a 20% new and 80% repeat mix.
- Visitor trip satisfaction is very high and tells us that Clackamas County has a good foundation of satisfied visitors as well as a good variety of things to do and see.
- CCTDC now has information on trip planning/timing to use in crafting marketing messages.
 - ✓ The internet continues to grow in significance as a planning tool.
 - ✓ Timing is everything.
- The survey of overnight visitors should be conducted on an annual or biannual basis to measure and track trends. Additional data that needs to be collected on the next survey includes:
 - ✓ What day(s) of week visitors are in Clackamas County.
 - ✓ What other destinations are considered (who is the competition).
 - ✓ When in the planning cycle the actual trip planning takes place.
 - ✓ What counties in Washington and California visitors come from.
 - ✓ Where the visitors money is actually spent.
 - ✓ Where, specifically, activities they participated in are located (i.e. End of the Oregon Trail Interpretive Center, Government Camp, etc.).