



VISIT CENTRAL OREGON

ADVENTURE CALLS

# DESTINATION BRAND RESEARCH SURVEY OF OWNED AUDIENCES

REPORT OF FINDINGS

December 2020

Destination  Analysts

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# RESEARCH OVERVIEW & OBJECTIVES

This report presents the findings of a Visitor and Destination Brand Perception Survey conducted on behalf of Visit Central Oregon by Destination Analysts.

The primary objectives of this study—to collect data on those who traveled to Central Oregon—is supported by learning about the destination's visitors, including:

- Visitor point of origin
- Activities and attractions in-market
- Length of stay
- Spending in the destination
- Inspiration/motivations for visiting Central Oregon
- Satisfaction with the visitor experience
- Perceptions of Central Oregon
- Demographics

# RESEARCH METHODOLOGY

Destination Analysts worked closely with Visit Central Oregon on developing and designing the questionnaire for this study, otherwise referred to as the Central Oregon Survey of Owned Audiences. Visit Central Oregon then distributed the survey via email to the DMO's lists of e-newsletter subscribers and visitor guide requestors, as well as to its social media audiences via Facebook and Instagram and website audience via its official tourism website, [VisitCentralOregon.com](http://VisitCentralOregon.com).

The following Visit Central Oregon partners and key tourism businesses also distributed the survey to their consumer lists:

- Deschutes Historical Museum
- High Desert Museum
- Prineville Chamber of Commerce
- Redmond Chamber of Commerce
- Riverhouse Hotel
- Visit Bend
- Wanderlust Tours

# RESEARCH METHODOLOGY

Given this approach of surveying Visit Central Oregon's owned audiences and the consumer databases of key partners, it should be noted that survey respondents are not the typical or average visitor to the destination (e.g., the average visitor who could potentially be surveyed in-market via an in-person intercept survey approach). Rather, recent visitors surveyed for this study are those who are engaged with Visit Central Oregon and its key partners.

In order to complete the full survey, respondents must have met the following screening requirements:

- Adults age 18+
- Must currently live outside of Central Oregon

Recent visitors were identified as those who visited Central Oregon between 2018 – 2020.

Non-visitors, comprised of lapsed visitors who traveled to Central Oregon more than two years ago and those who have never visited Central Oregon, answered the brand-related questions within the survey.

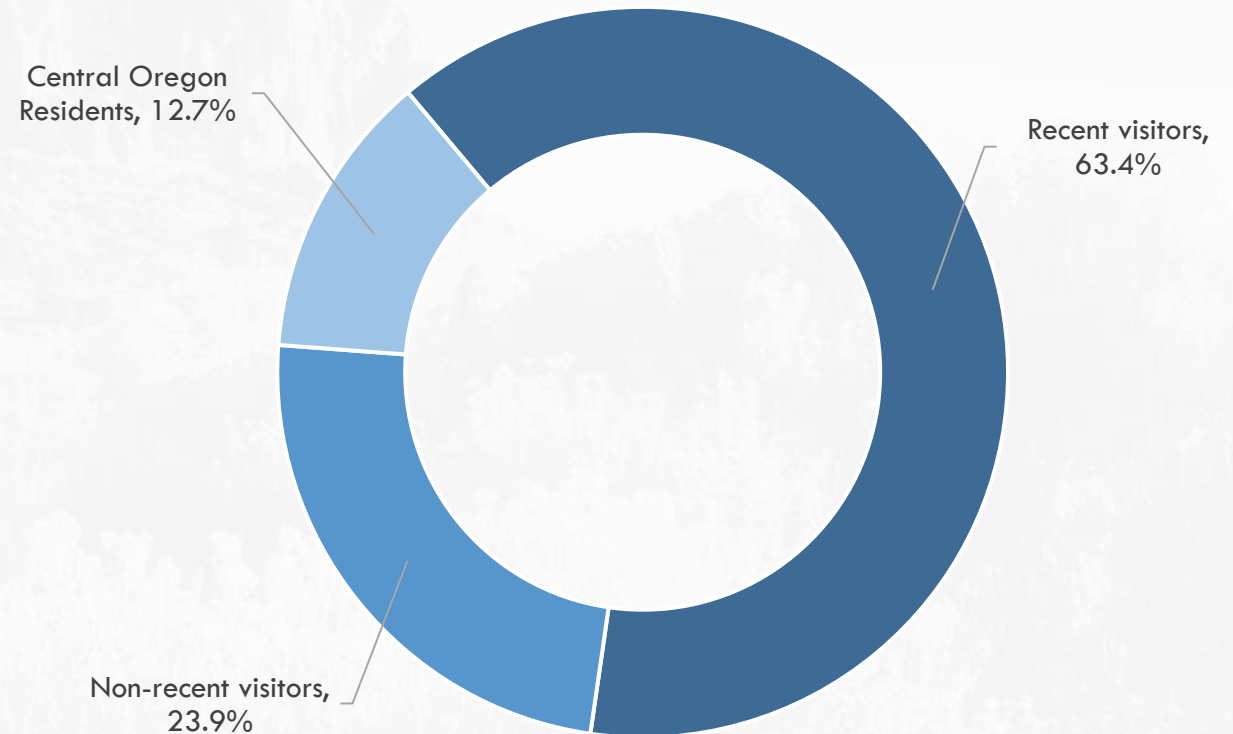
# DATA COLLECTION

In total, 3,550 completed surveys were collected between August 28 and November 18, 2020.

Of the 3,550 completed surveys, 2,250 surveys, or 63.4 percent, were from recent visitors who took a trip to Central Oregon within the past two years. 850 surveys, or 23.9 percent, were from non-recent visitors who live outside Central Oregon and did not visit the destination within the past two years. The remaining 450 surveys, or 12.7 percent, were from Central Oregon residents who completed the demographic questions, as well as a few brand-related questions within the survey.

The breakout of all completed surveys collected by respondent type is presented in the chart at right.

**Breakout of All Completed Surveys Collected by Respondent Type:**



# DATA COLLECTION

The following is a breakout of completed surveys collected by each source and/or Visit Central Oregon partner.

Source	Completed Surveys
Visit Central Oregon e-Newsletter Subscribers	2,702
Visit Central Oregon Visitor Guide Requestors	61
Visit Central Oregon Social Media Audiences	91
Visit Central Oregon Website Users	76
Deschutes Historical Museum	17
High Desert Museum	110
Prineville Chamber of Commerce	51
Redmond Chamber of Commerce	7
Riverhouse Hotel	129
Visit Bend	299
Wanderlust Tours	7
TOTAL	3,550

# ABOUT THIS REPORT: KEY TERMS

*The following terms are used in the summaries, analysis, charts and/or data tables within this report.*

- **Recent Visitors or Visitors** – survey respondents who visited Central Oregon within the past two years.
- **Non-Recent Visitors** – survey respondents who did not visit Central Oregon within the past two years.
- **Potential Visitors** – survey respondents who do not live within Central Oregon.
- **Residents or Central Oregon Residents** – survey respondents who live within Central Oregon.
- **Millennials** – survey respondents who are 39 years old or younger.
- **Gen Xers** – survey respondents who are 40 to 54 years old.
- **Baby Boomers** – survey respondents who are 55 years old or older.
- **Spring Visitors** – recent visitors who traveled to Central Oregon in the months of March, April and May.
- **Summer Visitors** – recent visitors who traveled to Central Oregon in the months of June, July and August.
- **Fall Visitors** – recent visitors who traveled to Central Oregon in the months of September, October and November.
- **Winter Visitors** – recent visitors who traveled to Central Oregon in the months of December, January and February.





# **SUMMARY OF KEY TAKEAWAYS**

# SUMMARY OF KEY TAKEAWAYS

- **Activities in-market and the motivators for visiting Central Oregon are reflective of the destination's brand perceptions.** Recent visitors to Central Oregon commonly went on scenic drives, hiked and visited state parks during their trip. Similarly, scenic beauty, enjoying outdoor activities and spending time in nature were amongst the most important factors in the decision to visit Central Oregon. Meanwhile, for both recent visitors and non-recent visitors alike, scenic beauty and the variety of outdoor activities were top-of-mind aspects that differentiate Central Oregon from other destinations in the Pacific Northwest. Furthermore, scenic beauty and outdoor recreation activities were amongst Central Oregon's highest rated attributes. Regardless of visitation, it's clear that Central Oregon has a strong destination brand amongst owned audiences surveyed.
- **While Central Oregon is clearly associated with scenic beauty and outdoor recreation, the destination overperforms for urban experiences such as craft breweries and shopping.** Although craft breweries and shopping are relatively less important in evaluating leisure travel destinations in the Pacific Northwest, owned audiences surveyed gave Central Oregon significantly higher ratings for these attributes compared to their relative level of importance. In the Focus Groups in Key Markets conducted by Destination Analysts in February 2020, leisure travelers in the focus groups (who were not owned audiences) shared that unique urban experiences, as well as accessible outdoors, were motivational for inspiring a trip to Central Oregon. Given that owned audiences rate Central Oregon highly for such urban experiences and the fact that focus group participants consider urban experiences motivational, it may be worthwhile to consider marketing Central Oregon's breweries, dining scene and shopping to leisure travelers who otherwise are not currently engaged with Central Oregon.
- **There is a perceived lack of affordability in Central Oregon.** While Central Oregon performed on par or overperformed for nearly all destination attributes tested, the one attribute of underperformance was affordability. The vast majority of owned audiences surveyed reported that affordability was important to selecting Pacific Northwest travel destinations (82.7%), however a smaller proportion rated Central Oregon to be good or very good for this attributes (56.3%). Additionally, over one-in-ten recent and non-recent visitors reported that being too expensive keeps them from visiting Central Oregon. For owned audiences, as well as travelers who are not engaged with Visit Central Oregon and its partners, messaging around value may be beneficial in tackling the perceived lack of affordability in Central Oregon.

# SUMMARY OF KEY TAKEAWAYS

- **There's an opportunity to educate travelers, especially non-recent visitors, about Central Oregon's offerings as a leisure destination.** While the top deterrents to visiting Central Oregon are ones that cannot necessarily be controlled by destination marketing—being too far, lack of vacation time and personal financial reasons—nearly one-in-five non-recent visitors said that they don't know enough about Central Oregon and that this reason keeps them from visiting, which is also reflective of findings that emerged from the Focus Groups in Key Markets. Despite the fact that these non-recent visitors surveyed are amongst Visit Central Oregon and its partners' owned audiences (consumer databases), this lack of knowledge about the destination highlights an opportunity to educate travelers about Central Oregon's assets, which could potentially boost levels of familiarity with and excitement about the destination, and ultimately generate incremental visitation.
- **Amongst the owned audiences surveyed, Visit Central Oregon's tourism website, eNewsletter and visitors guide are the most widely accessed official resources. However, it should be noted that the official Visit Central Oregon resources used in the past year vary by generation.** Aligning with findings from Destination Analysts' *The State of the American Traveler Study™*, as well as custom research studies conducted on behalf of many other destinations, Millennials and Gen Xers were likelier to report that they engaged with Visit Central Oregon's social media marketing on Facebook, Instagram and Twitter, compared to Baby Boomers. Meanwhile, Baby Boomers were more likely to say that they used the official Central Oregon Visitors Guide in the past twelve months.





**PROFILE SUMMARIES OF  
KEY TRAVELER SEGMENTS**

# RECENT VISITORS

Respondents who visited Central Oregon within the past two years.

2,250 COMPLETED SURVEYS.

The summary at right describes the key characteristics of Recent Visitors.

## KEY CHARACTERISTICS

- On average, recent visitors are 59.3 years in age with an annual household income of \$116,248. The majority are married/partnered (78.4%), while 13.0 percent have children under age 18.
- Nearly half of recent visitors who reside in the U.S. live within the state of Oregon (47.7%).
- As a place to visit for leisure, Central Oregon is highly rated for scenic beauty, as well as the chance to “get away from it all,” outdoor recreation, warm weather, off-the-beaten-path ambiance, restaurants, craft breweries and family-friendly activities.
- They averaged 3.7 trips to Central Oregon in the past two years.
- Their typical Central Oregon trip lasted 5.1 days and 4.4 nights, with half who stayed overnight in commercial lodging within the region.
- While dining and scenic drives are the most common trip activities, half reported that they hiked.
- Similarly, the top motivating draws for the region are: scenic beauty, outdoor activities, spending time in nature and overall ambiance.
- Central Oregon delivers a highly satisfactory visitor experience. Nearly all recent visitors were satisfied and, in turn, reported a high likelihood to recommend Central Oregon as a leisure travel destination.

# RECENT VISITORS *Who they are*



### Gender

Female: 56.5%

Male: 41.7%

Non-binary: 0.2%



### Marital Status

Married/partnered: 78.4%

Single: 16.8%

Children under 18: 13.0%



### Average Age: 59.3

Baby Boomers: 68.4%

Gen X: 23.4%

Millennials: 8.2%



### Ethnicity

Caucasian: 82.4%

Asian, Pacific Islander: 2.6%

Latino/Hispanic: 2.0%

**Combined Household Income: \$116,248**



# RECENT VISITORS *Who they are*

## Top MSAs

Portland, OR-WA	35.2%
Salem, OR	7.3%
Seattle-Everett, WA	6.8%
Eugene-Springfield, OR	6.1%
San Francisco-Oakland, CA	3.1%

## Top U.S. States

Oregon	47.7%
Washington	17.1%
California	14.7%
Idaho	2.5%
Arizona	2.0%

## Top Countries

United States	95.6%
Canada	2.4%
Germany	0.5%
United Kingdom	0.5%

## Important Factors for Planning a Leisure Trip to the Pacific Northwest



**96.5%**  
Scenic  
Beauty



**88.6%**  
Chance to "get  
away from it all"



**82.0%**  
Affordability



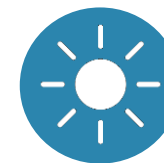
**81.2%**  
Restaurants  
& Food



**81.2%**  
Outdoor  
Recreation



**75.8%**  
Off the  
Beaten Path



**66.2%**  
Warm, Sunny  
Weather



**64.7%**  
Historic  
Attractions

**3.7**

**Average Trips to Central Oregon  
in the Past Two Years**

**54.2%**

**Familiarity with Attractions &  
Things to Do in Central Oregon**  
(Top 2 Box Score—Mostly Familiar  
or Extremely Familiar)

**76.6%**

**Excitement about Attractions &  
Things to Do in Central Oregon**  
(Top 2 Box Score—Mostly Exciting  
or Extremely Exciting)



**8.9**

**Likelihood to Recommend Central  
Oregon as a Place to Visit for Leisure**  
(Average score on an 11-point scale)

## Top Attributes of Central Oregon

(Top 2 Box Score—Good or Very Good)

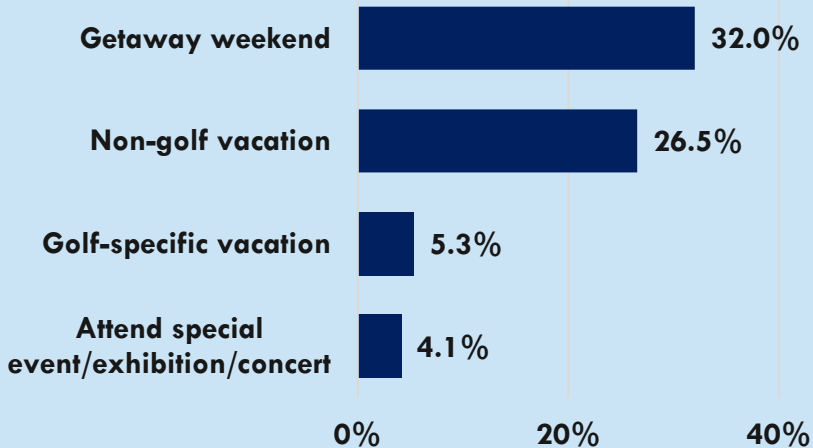
<b>Scenic beauty</b>	98.8%
<b>Chance to “get away from it all”</b>	93.1%
<b>Outdoor recreation activities</b>	92.3%
<b>Warm, sunny weather</b>	88.6%
<b>Off the beaten path ambiance</b>	86.7%
<b>Restaurants and food</b>	86.6%

## Top Deterrents to Visiting Central Oregon

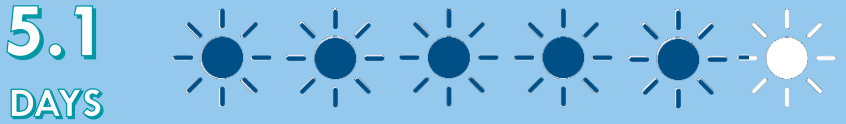
<b>Too far from home</b>	24.4%
<b>Lack of personal vacation time</b>	23.1%
<b>Personal financial reasons</b>	14.6%
<b>I prefer visiting new destinations</b>	12.3%
<b>Too expensive</b>	12.2%



### Primary Reason for Most Recent Trip



### Days Spent in Central Oregon



### Nights Spent in Central Oregon



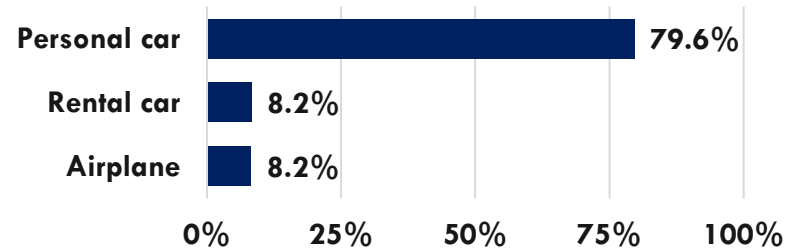
### Place of Overnight Stay

Hotel, resort, motel, inn or hostel in Central Oregon	50.0%
Private home rental inside Central Oregon (Airbnb, etc.)	19.1%
Other (campground, RV park, etc.)	18.2%
Private residence in Central Oregon	16.2%

### Area of Overnight Stay

Bend	52.0%
Sunriver	21.0%
Redmond	12.0%
Sisters	10.8%

## Method of Arrival

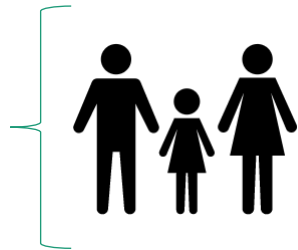


## Travel Party

1.3 ADULT MALES

1.3 ADULT FEMALES

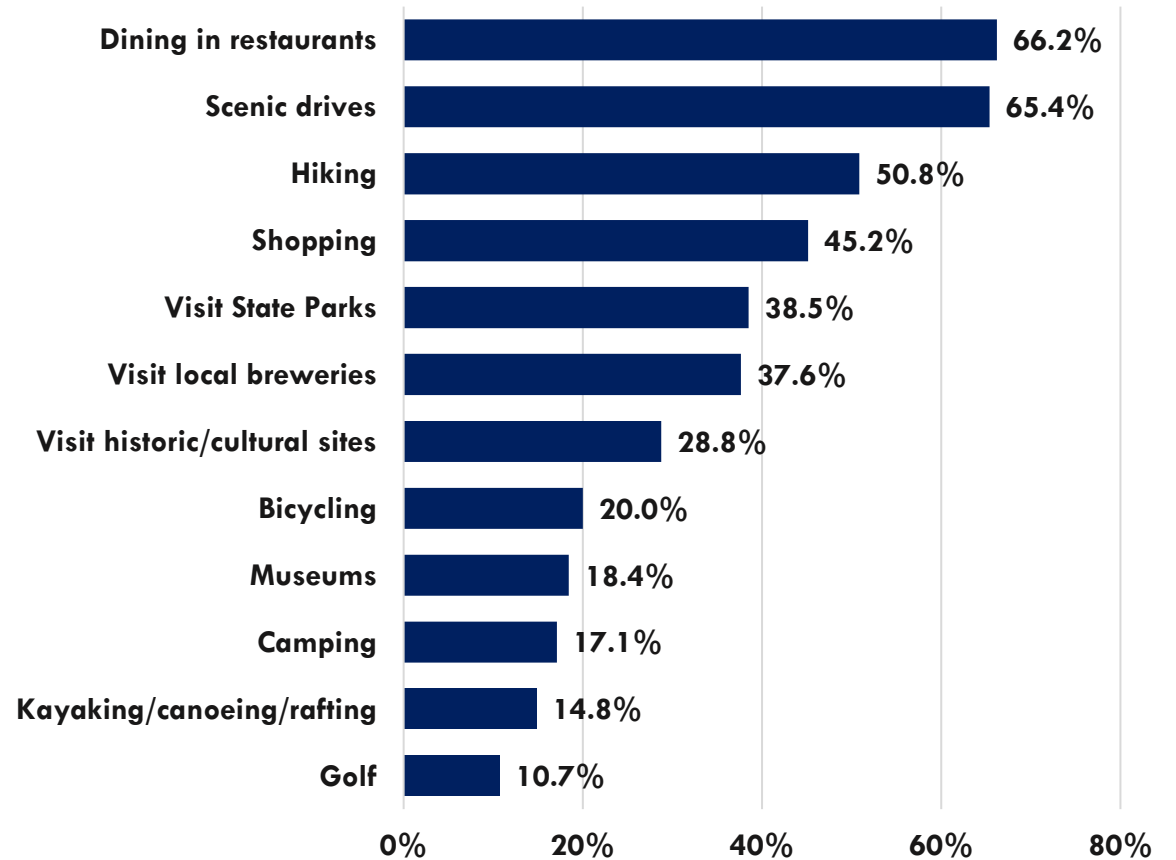
0.5 CHILDREN



Average Spending  
Per Person, Per Day

**\$429.48**

## Top Central Oregon Activities



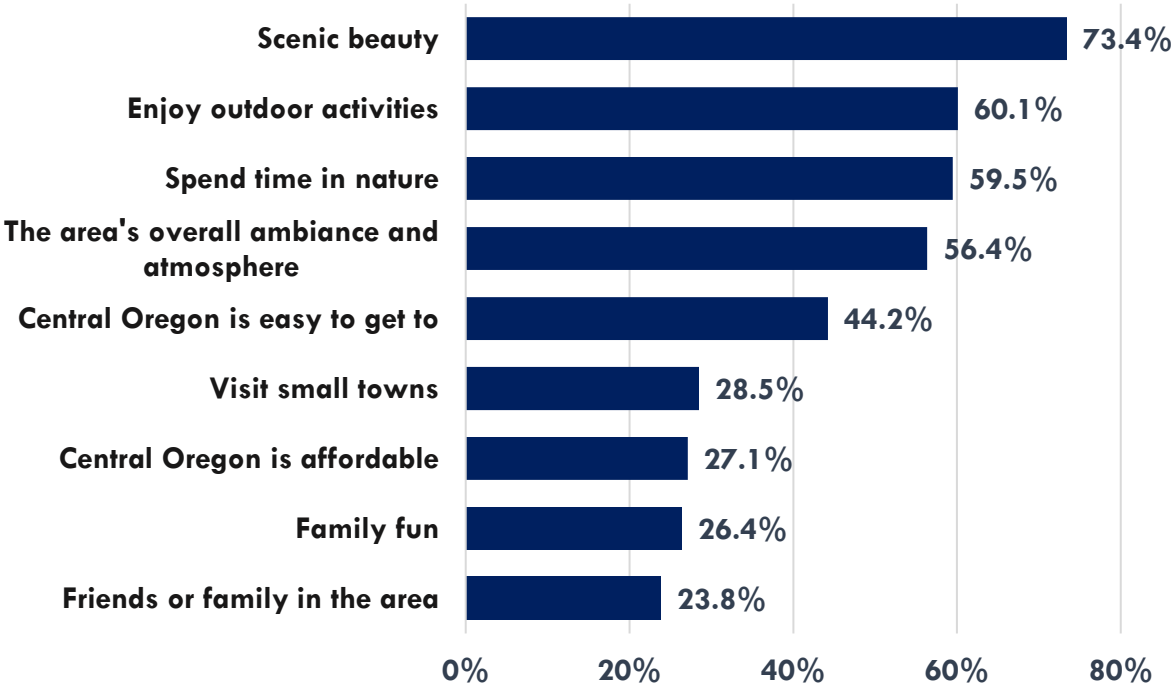
## Top Central Oregon Areas Visited

<b>Bend</b>	76.5%
<b>Sisters</b>	47.6%
<b>Redmond</b>	33.5%
<b>Sunriver</b>	31.3%

## Top Central Oregon Attractions Visited

<b>Deschutes River</b>	43.4%
<b>Crater Lake National Park</b>	21.6%
<b>Cascade Lake Scenic Byway</b>	19.5%
<b>Smith Rock State Park</b>	19.1%
<b>Mt. Bachelor</b>	17.5%

## Important Factors in Deciding to Visit Central Oregon



96.6%

**Satisfaction with Visitor Experience in Central Oregon**  
(Top 2 Box Score—Satisfied or Very Satisfied)

# MILLENNIALS (RECENT VISITORS)

Recent visitors who are 39 years old or younger.

185 COMPLETED SURVEYS.

The summary at right describes the key characteristics of Recent Millennial Visitors.

## KEY CHARACTERISTICS

- The average Millennial visitor is 33.7 years in age with an annual household income of \$106,484. Most are married/partnered (70.3%) and a third (32.4%) have children under age 18.
- As a place to visit for leisure, they rate Central Oregon “good” or “very good” for scenic beauty and they’re more likely than the average visitor to say Central Oregon is good for outdoor recreation and craft breweries.
- Of the generations, they took the most trips to Central Oregon in the past two years (4.2), but spent less time in-market, with an average of 4.0 days and 3.3 nights.
- Millennial visitors were more likely than their older counterparts to go hiking during their Central Oregon trip and they were also likelier to say that enjoying outdoor activities was important to their decision to visit the region.
- While they are similarly satisfied with their visitor experience and similarly likely to recommend Central Oregon as a destination to others, Millennial visitors expressed higher levels of excitement about Central Oregon’s attractions and activities compared to the typical visitor and compared to the other generations.
- Amongst the official Visit Central Oregon resources accessed in the past year, Millennial visitors most commonly used VisitCentralOregon.com, however were much more likely than older generations to engage with Visit Central Oregon on social media, notably Instagram.

# MILLENNIALS (RECENT VISITORS) *Who they are*



## Gender

Female: 70.3%

Male: 27.0%

Non-binary: 0.5%



## Marital Status

Married/partnered: 70.3%

Single: 24.9%

Children under 18: 32.4%



**Average Age: 33.7**



## Ethnicity

Caucasian: 74.1%

Asian, Pacific Islander: 7.0%

Latino/Hispanic: 5.9%

**Combined Household Income: \$106,484**



# MILLENNIALS (RECENT VISITORS) *Who they are*

## Top MSAs

Portland, OR-WA	40.7%
Eugene-Springfield, OR	6.0%
Salem, OR	6.0%
Seattle-Everett, WA	5.3%

## Top U.S. States

Oregon	57.1%
Washington	13.0%
California	8.5%
Texas	2.8%
Idaho	2.3%

## Top Countries

United States	95.7%
Canada	3.2%
Germany	0.5%
Netherlands	0.5%

## Important Factors for Planning a Leisure Trip to the Pacific Northwest



**98.4%**  
Scenic  
Beauty



**92.4%**  
Chance to "get  
away from it all"



**89.7%**  
Outdoor  
Recreation



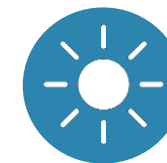
**89.2%**  
Affordability



**86.5%**  
Restaurants  
and Food



**77.3%**  
Off the  
Beaten Path



**64.3%**  
Warm, Sunny  
Weather



**61.1%**  
Craft  
Breweries

**4.2**

**Average Trips to Central Oregon  
in the Past Two Years**

**45.9%**

**Familiarity with Attractions &  
Things to Do in Central Oregon**  
(Top 2 Box Score—Mostly Familiar  
or Extremely Familiar)

**81.1%**

**Excitement about Attractions &  
Things to Do in Central Oregon**  
(Top 2 Box Score—Mostly Exciting  
or Extremely Exciting)



## Top Attributes of Central Oregon

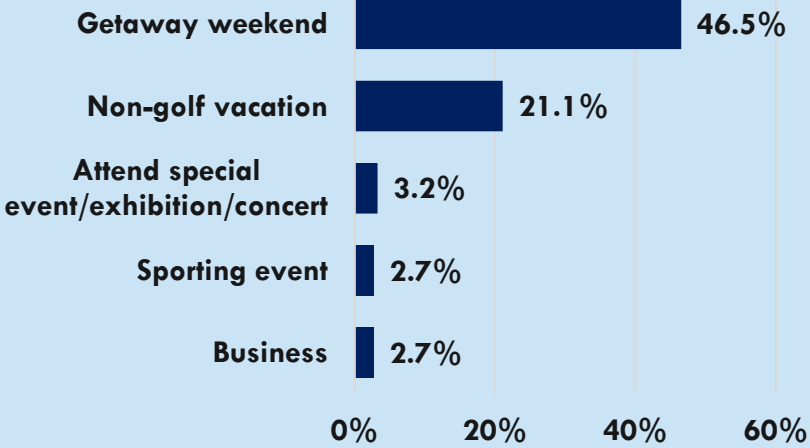
(Top 2 Box Score—Good or Very Good)

<b>Scenic beauty</b>	98.9%
<b>Outdoor recreation activities</b>	96.8%
<b>Chance to “get away from it all”</b>	94.6%
<b>Warm, sunny weather</b>	91.4%
<b>Off the beaten path ambiance</b>	88.6%
<b>Restaurants and food</b>	88.1%
<b>Craft breweries/distilleries</b>	87.6%

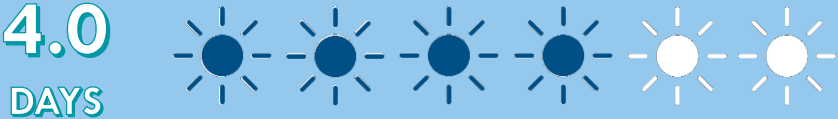
## Top Deterrents to Visiting Central Oregon

<b>Lack of personal vacation time</b>	36.2%
<b>Too far from home</b>	30.8%
<b>Personal financial reasons</b>	21.1%
<b>Too expensive</b>	19.5%
<b>I prefer visiting new destinations</b>	15.1%

### Primary Reason for Most Recent Trip



### Days Spent in Central Oregon



### Nights Spent in Central Oregon



### Place of Overnight Stay

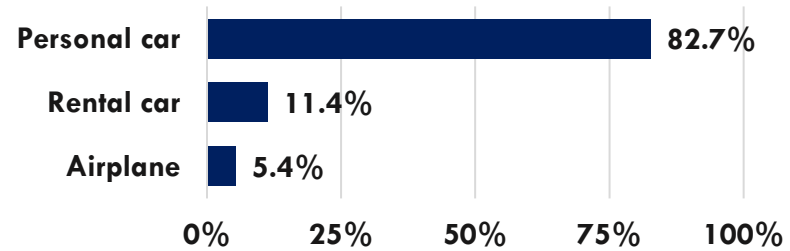
Hotel, resort, motel, inn or hostel in Central Oregon	40.8%
Private home rental inside Central Oregon (Airbnb, etc.)	22.9%
Other (campground, RV park, etc.)	22.3%
Private residence in Central Oregon	19.6%

### Area of Overnight Stay

Bend	56.6%
Sunriver	14.5%
Redmond	13.8%



## Method of Arrival

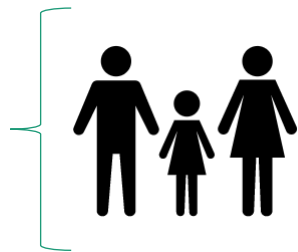


## Travel Party

1.3 ADULT MALES

1.4 ADULT FEMALES

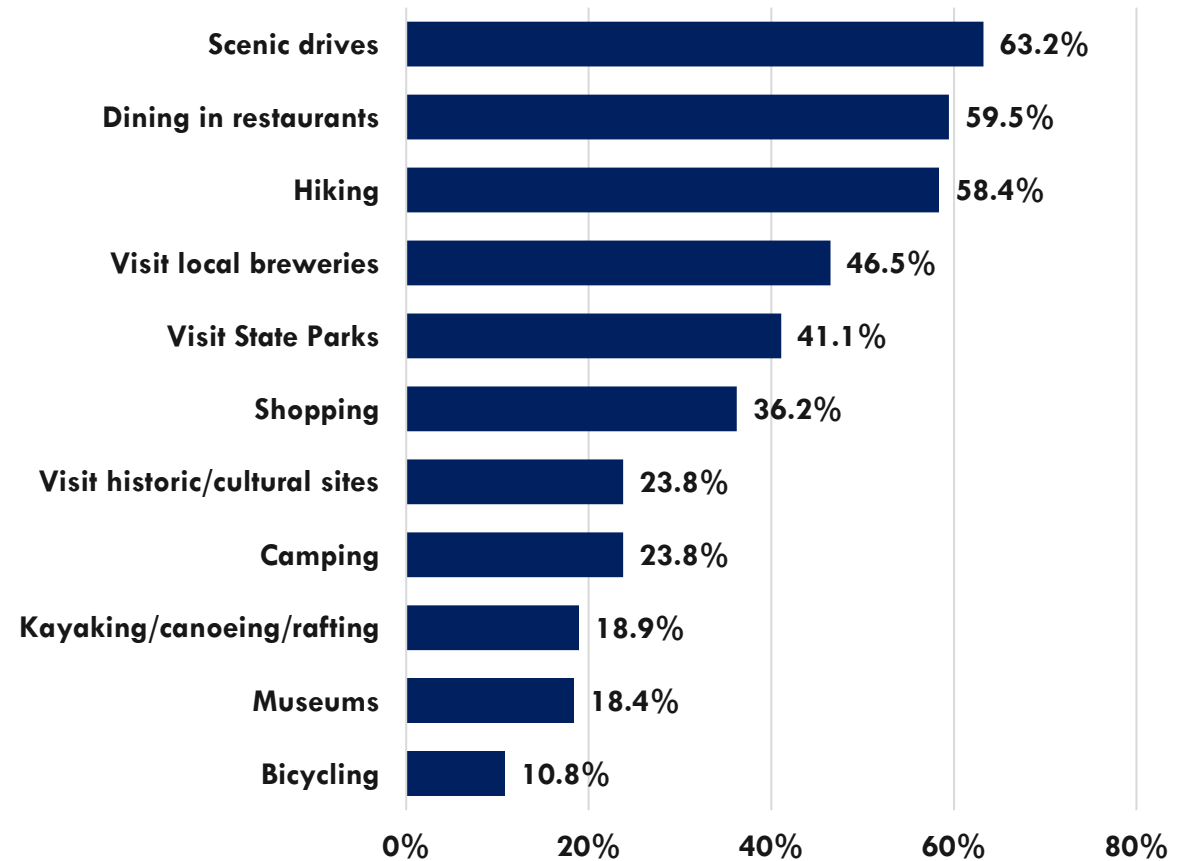
0.8 CHILDREN



Average Spending  
Per Person, Per Day

**\$358.20**

## Top Central Oregon Activities



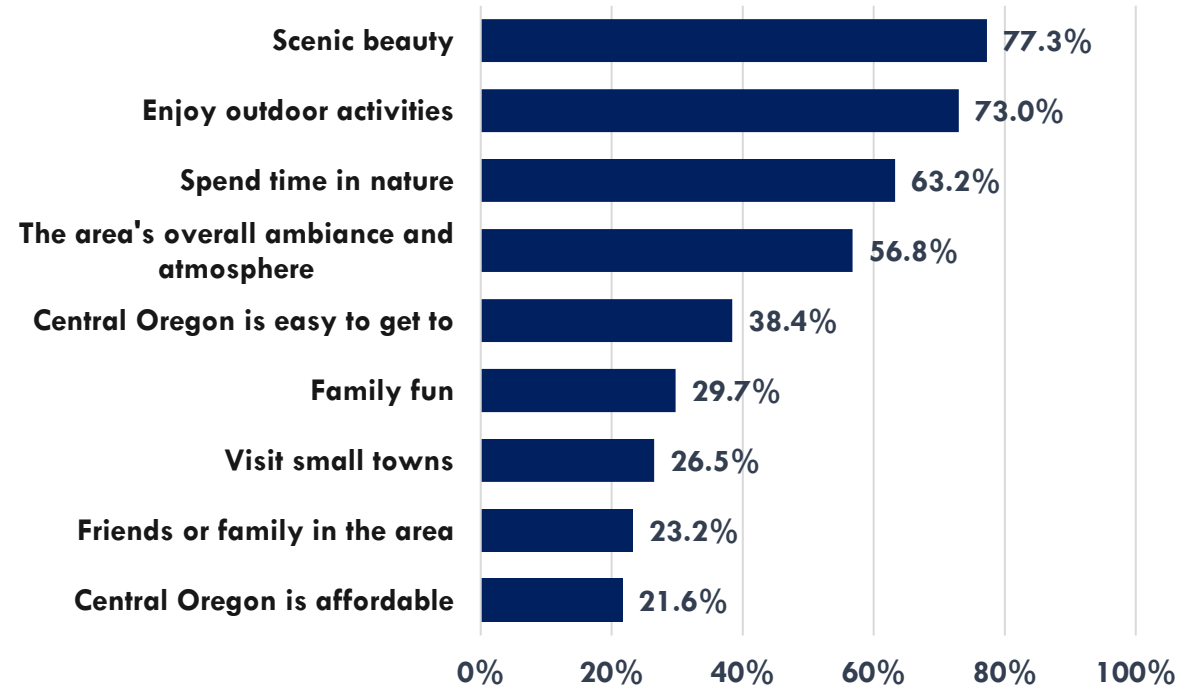
## Top Central Oregon Areas Visited

<b>Bend</b>	74.6%
<b>Sisters</b>	42.7%
<b>Redmond</b>	33.5%
<b>Sunriver</b>	27.6%

## Top Central Oregon Attractions Visited

<b>Deschutes River</b>	35.7%
<b>Smith Rock State Park</b>	18.9%
<b>Cascade Lake Scenic Byway</b>	18.4%
<b>Newberry National Volcanic Monument</b>	15.1%

## Important Factors in Deciding to Visit Central Oregon



**96.2%**

**Satisfaction with Visitor Experience in Central Oregon**  
(Top 2 Box Score—Satisfied or Very Satisfied)

# GEN X (RECENT VISITORS)

Recent visitors who are 40 to 54 years old.

526 COMPLETED SURVEYS.

The summary at right describes the key characteristics of Recent Gen X Visitors.

## KEY CHARACTERISTICS

- The typical Gen X visitor is 48.0 years old with an annual household income of \$133,295. Similar to the average recent visitor, the majority are married/partnered (78.1%). They're the likeliest generation to have children under 18 (36.5%).
- Similar to the typical recent visitor, nearly all Gen Xers rated Central Oregon highly for scenic beauty, however they're more likely than the typical visitor and other generations to say that Central Oregon is "good" or "very good" for family-friendly activities.
- Gen X visitors were more likely than other generations to bike and kayak during their Central Oregon trip, and they were also likelier to say that family fun was important to their decision to visit the region.
- Similar to the typical recent visitor, Gen X visitors are highly satisfied with their Central Oregon trip and highly likely to recommend the destination to others.
- Compared to the average recent visitor surveyed, they're less likely to have engaged with Visit Central Oregon's official visitors guide and more likely to have accessed Visit Central Oregon on Instagram in the past year.

# GEN X (RECENT VISITORS) *Who they are*



## Gender

Female: 63.1%

Male: 34.6%

Non-binary: 0.4%



## Marital Status

Married/partnered: 78.1%

Single: 17.9%

Children under 18: 36.5%



**Average Age: 48.0**



## Ethnicity

Caucasian: 79.7%

Latino/Hispanic: 3.8%

Asian, Pacific Islander: 3.4%

**Combined Household Income: \$133,295**



# GEN X (RECENT VISITORS) *Who they are*

## Top MSAs

Portland, OR-WA	49.4%
Salem, OR	7.1%
Seattle-Everett, WA	5.5%
Eugene-Springfield, OR	4.6%

## Top U.S. States

Oregon	55.7%
Washington	17.2%
California	11.8%
Idaho	4.0%

## Top Countries

United States	95.2%
Canada	2.3%
United Kingdom	1.0%

## Important Factors for Planning a Leisure Trip to the Pacific Northwest



**97.0%**  
Scenic  
Beauty



**91.3%**  
Chance to “get  
away from it all”



**87.5%**  
Outdoor  
Recreation



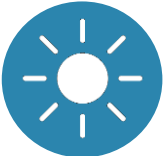
**85.0%**  
Restaurants  
& Food



**81.7%**  
Affordability



**75.7%**  
Off the  
Beaten Path



**64.1%**  
Warm, Sunny  
Weather



**56.3%**  
Historic  
Attractions

**4.0** Average Trips to Central Oregon in the Past Two Years

**52.7%**

**Familiarity with Attractions & Things to Do in Central Oregon**  
(Top 2 Box Score—Mostly Familiar or Extremely Familiar)

**76.2%**

**Excitement about Attractions & Things to Do in Central Oregon**  
(Top 2 Box Score—Mostly Exciting or Extremely Exciting)



**9.0**

**Likelihood to Recommend Central Oregon as a Place to Visit for Leisure**  
(Average score on an 11-point scale)

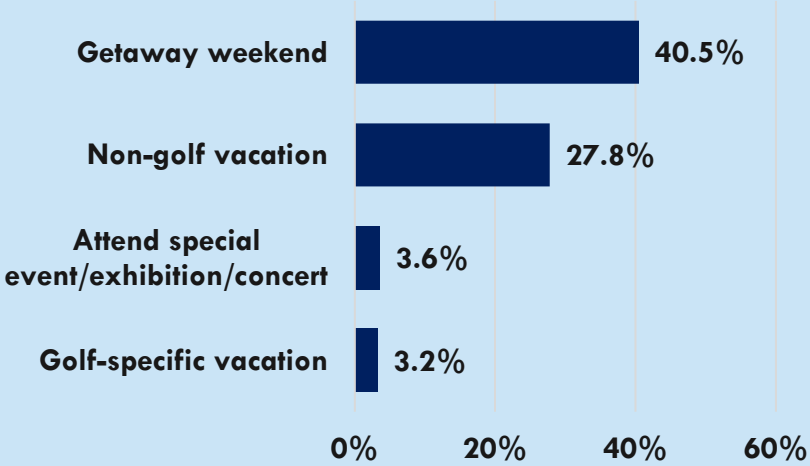
## Top Attributes of Central Oregon (Top 2 Box Score—Good or Very Good)

Scenic beauty	98.5%
Outdoor recreation activities	96.2%
Chance to “get away from it all”	94.9%
Warm, sunny weather	89.7%
Restaurants and food	88.0%
Off the beaten path ambiance	85.4%
Craft breweries/distilleries	82.5%

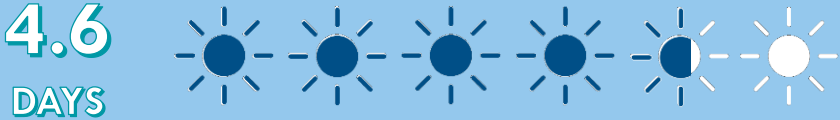
## Top Deterrents to Visiting Central Oregon

Lack of personal vacation time	32.3%
Too far from home	24.9%
Too expensive	18.8%
Personal financial reasons	17.3%
I prefer visiting new destinations	12.7%

### Primary Reason for Most Recent Trip



### Days Spent in Central Oregon



### Nights Spent in Central Oregon



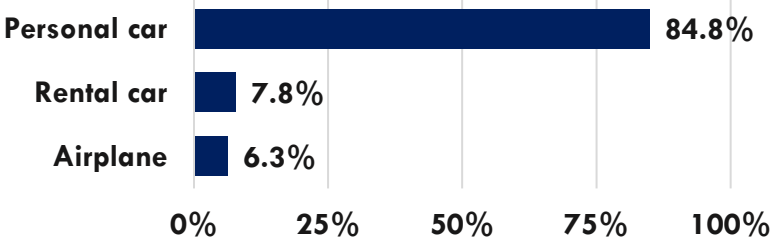
### Place of Overnight Stay

Hotel, resort, motel, inn or hostel in Central Oregon	45.0%
Private home rental inside Central Oregon (Airbnb, etc.)	26.8%
Other (campground, RV park, etc.)	17.0%
Private residence in Central Oregon	14.0%

### Area of Overnight Stay

Bend	54.6%
Sunriver	23.7%
Sisters	9.2%
Redmond	8.9%

## Method of Arrival

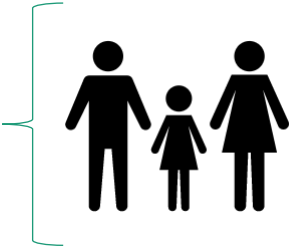


## Travel Party

1.3 ADULT MALES

1.3 ADULT FEMALES

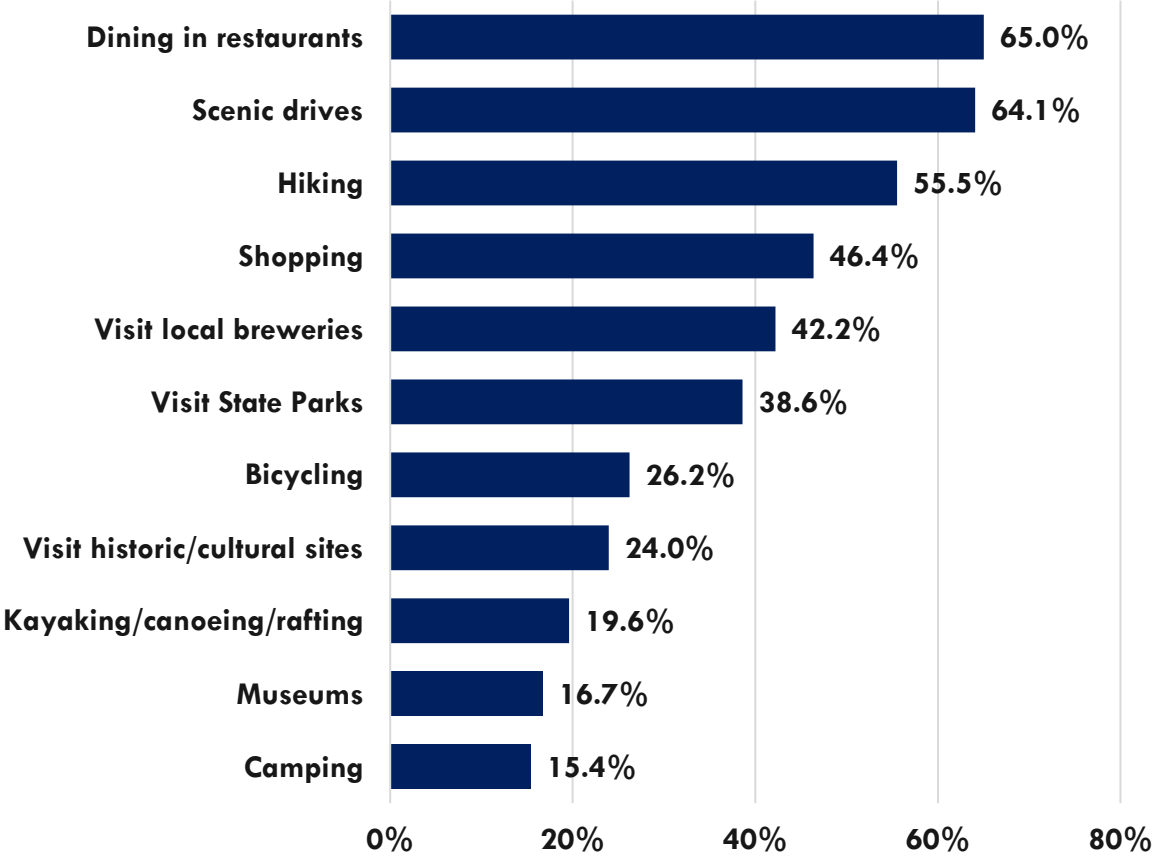
0.8 CHILDREN



Average Spending  
Per Person, Per Day

**\$421.27**

## Top Central Oregon Activities





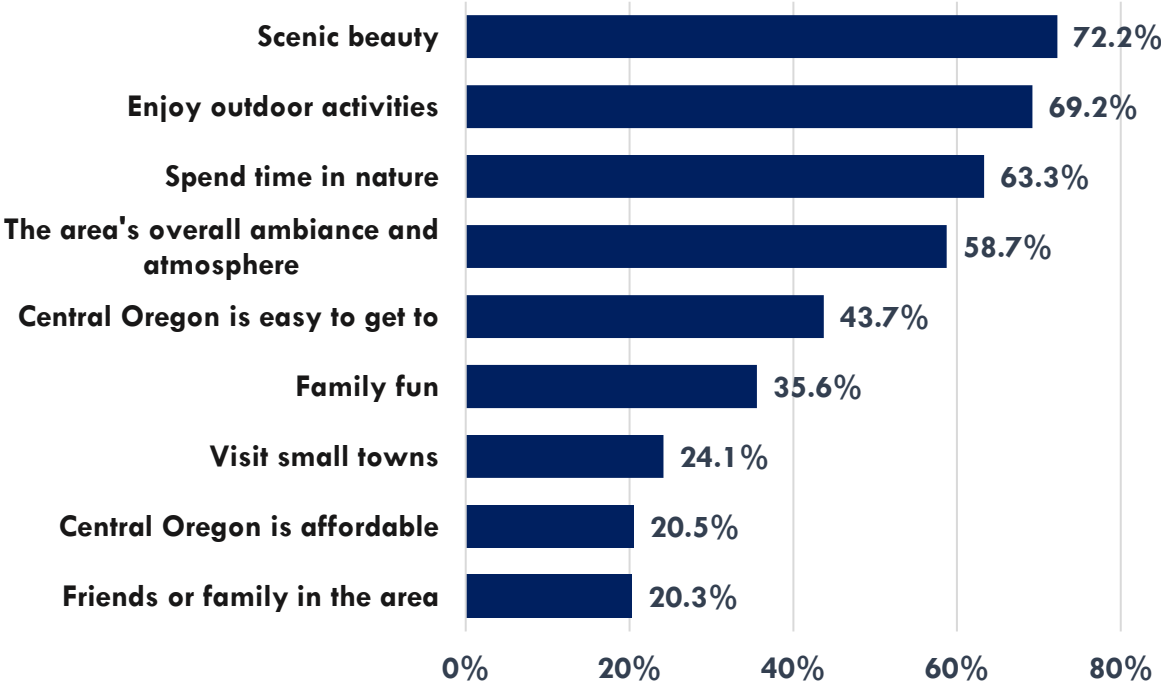
## Top Central Oregon Areas Visited

<b>Bend</b>	79.7%
<b>Sisters</b>	42.8%
<b>Sunriver</b>	31.6%
<b>Redmond</b>	27.2%

## Top Central Oregon Attractions Visited

<b>Deschutes River</b>	44.9%
<b>Mt. Bachelor</b>	19.8%
<b>Crater Lake National Park</b>	19.6%
<b>Cascade Lake Scenic Byway</b>	19.2%
<b>Smith Rock State Park</b>	17.9%

## Important Factors in Deciding to Visit Central Oregon



96.8%

**Satisfaction with Visitor Experience in Central Oregon**  
(Top 2 Box Score—Satisfied or Very Satisfied)

# BABY BOOMERS (RECENT VISITORS)

Recent visitors who are 55 years old or older.

1,539 COMPLETED SURVEYS.

The summary at right describes the key characteristics of Recent Baby Boomer Visitors.

## KEY CHARACTERISTICS

- The average Baby Boomer visitor surveyed in this research is 66.2 years in age with an annual household incomes of \$111,011. The majority are married/partnered (79.5%).
- They're more likely than the typical recent visitor to rate Central Oregon highly for arts & culture and affordability, yet less likely to say the destination is good for craft breweries and winter recreation.
- Though only 6.7 percent, they are the likeliest of the generations to have visited for a golf-specific vacation and 12.2 percent golfed during their trip.
- Amongst the generations, Baby Boomers spent the most time in Central Oregon, at 5.4 days and 4.7 nights.
- A larger proportion of Baby Boomers visited historic and cultural sites.
- They were more likely to say that small towns and affordability were important to their decision to visit, and less likely to say that the outdoors and spending time in nature were important.
- Similar to their younger counterparts, they are highly satisfied with their Central Oregon visitor experience and highly likely to recommend the region as a leisure travel destination.
- Amongst the generations, they were the likeliest to have accessed VisitCentralOregon.com and the official Central Oregon visitors guide in the past year.

# BABY BOOMERS (RECENT VISITORS) *Who they are*



### Gender

Female: 52.6%

Male: 45.9%

Non-binary: 0.1%



### Marital Status

Married/partnered: 79.5%

Single: 15.5%

Children under 18: 2.6%



**Average Age: 66.2**



### Ethnicity

Caucasian: 84.3%

Asian, Pacific Islander: 1.8%

Latino/Hispanic: 1.0%

**Combined Household Income: \$111,011**



# BABY BOOMERS (RECENT VISITORS) *Who they are*

## Top MSAs

Portland, OR-WA	29.3%
Salem, OR	7.5%
Seattle-Everett, WA	7.4%
Eugene-Springfield, OR	6.7%

## Top U.S. States

Oregon	43.8%
Washington	17.6%
California	16.5%
Arizona	2.4%
Idaho	2.0%
Florida	2.0%

## Top Countries

United States	95.7%
Canada	2.3%
Germany	0.6%
United Kingdom	0.5%

## Important Factors for Planning a Leisure Trip to the Pacific Northwest



**96.1%**  
Scenic  
Beauty



**87.3%**  
Chance to "get  
away from it all"



**81.2%**  
Affordability



**79.3%**  
Restaurants  
& Food



**78.0%**  
Outdoor  
Recreation



**75.7%**  
Off the  
Beaten Path



**68.2%**  
Historic  
Attractions



**67.1%**  
Warm, Sunny  
Weather

**3.6**

**Average Trips to Central Oregon  
in the Past Two Years**

**55.8%**

**Familiarity with Attractions &  
Things to Do in Central Oregon**  
(Top 2 Box Score—Mostly Familiar  
or Extremely Familiar)

**76.2%**

**Excitement about Attractions &  
Things to Do in Central Oregon**  
(Top 2 Box Score—Mostly Exciting  
or Extremely Exciting)

**8.9**

**Likelihood to Recommend Central  
Oregon as a Place to Visit for Leisure**  
(Average score on an 11-point scale)

## Top Attributes of Central Oregon

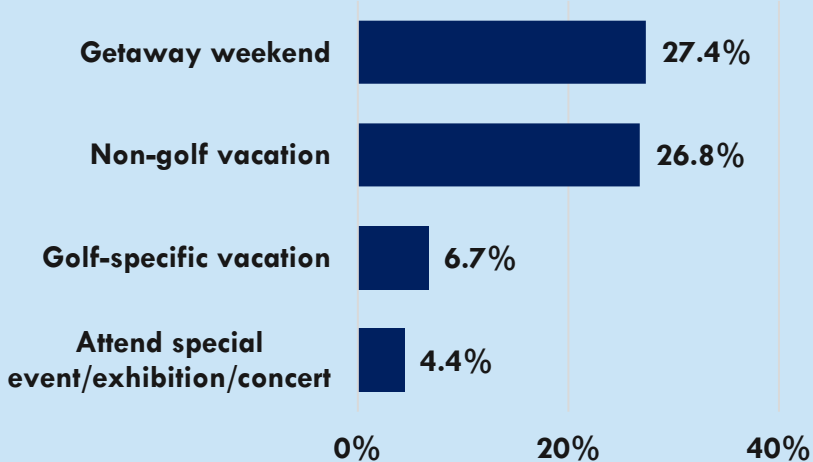
(Top 2 Box Score—Good or Very Good)

<b>Scenic beauty</b>	98.8%
<b>Chance to “get away from it all”</b>	92.3%
<b>Outdoor recreation activities</b>	90.4%
<b>Warm, sunny weather</b>	87.8%
<b>Off the beaten path ambiance</b>	86.9%
<b>Restaurants and food</b>	85.9%

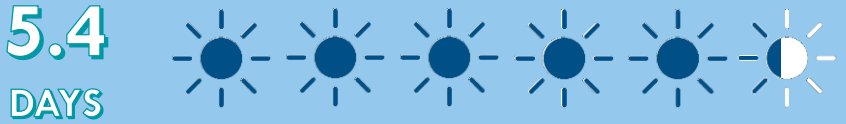
## Top Deterrents to Visiting Central Oregon

<b>Too far from home</b>	23.5%
<b>Lack of personal vacation time</b>	18.3%
<b>Personal financial reasons</b>	12.9%
<b>I prefer visiting new destinations</b>	11.8%

### Primary Reason for Most Recent Trip



### Days Spent in Central Oregon



### Nights Spent in Central Oregon



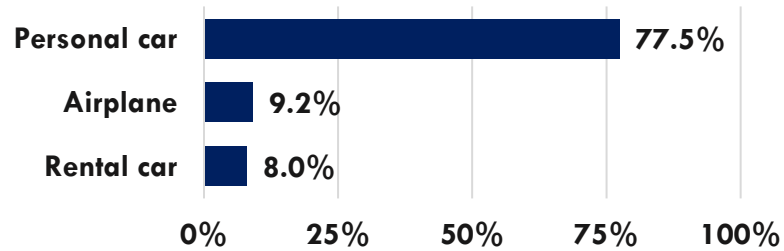
### Place of Overnight Stay

Hotel, resort, motel, inn or hostel in Central Oregon	52.7%
Other (campground, RV park, etc.)	18.1%
Private residence in Central Oregon	16.5%
Private home rental inside Central Oregon (Airbnb, etc.)	16.1%

### Area of Overnight Stay

Bend	50.6%
Sunriver	20.9%
Other	13.1%
Redmond	12.8%
Sisters	11.8%

## Method of Arrival

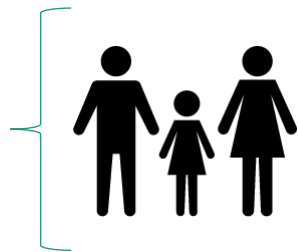


## Travel Party

1.4 ADULT MALES

1.3 ADULT FEMALES

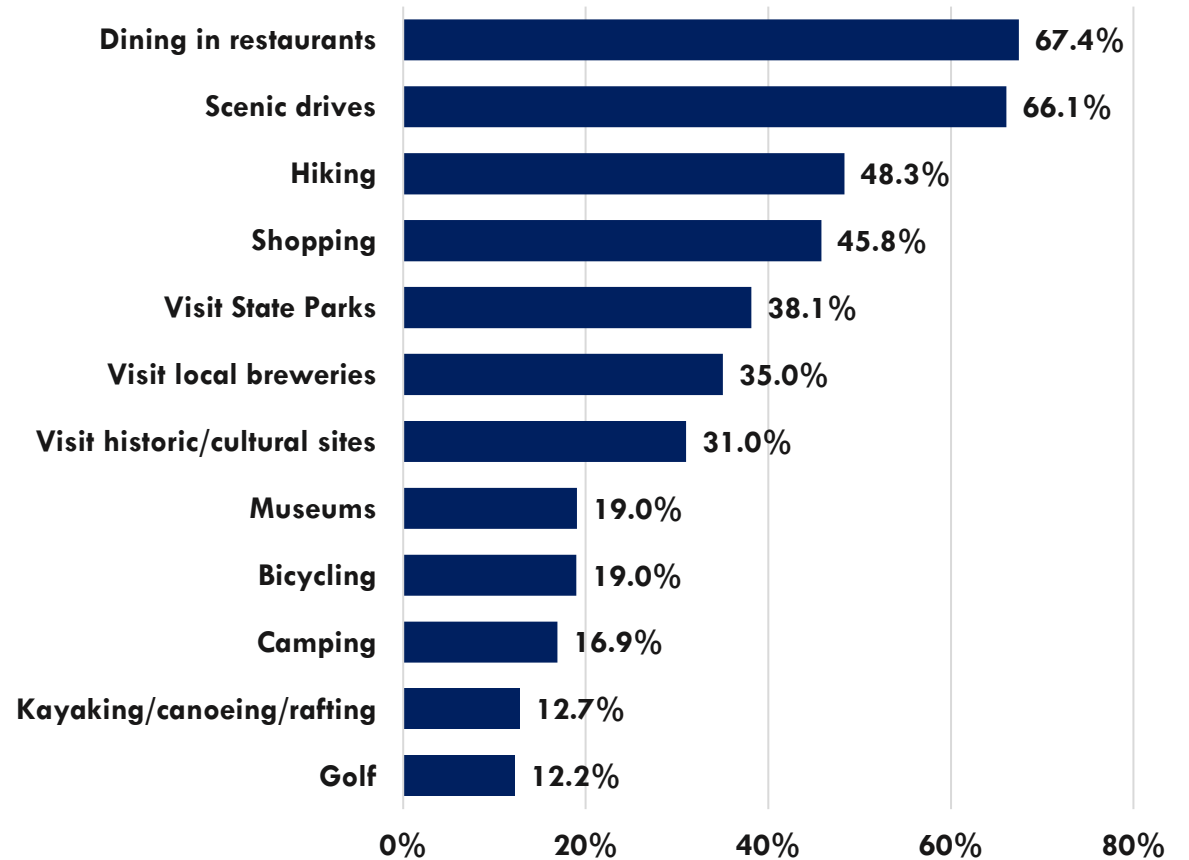
0.3 CHILDREN



Average Spending  
Per Person, Per Day

**\$442.25**

## Top Central Oregon Activities



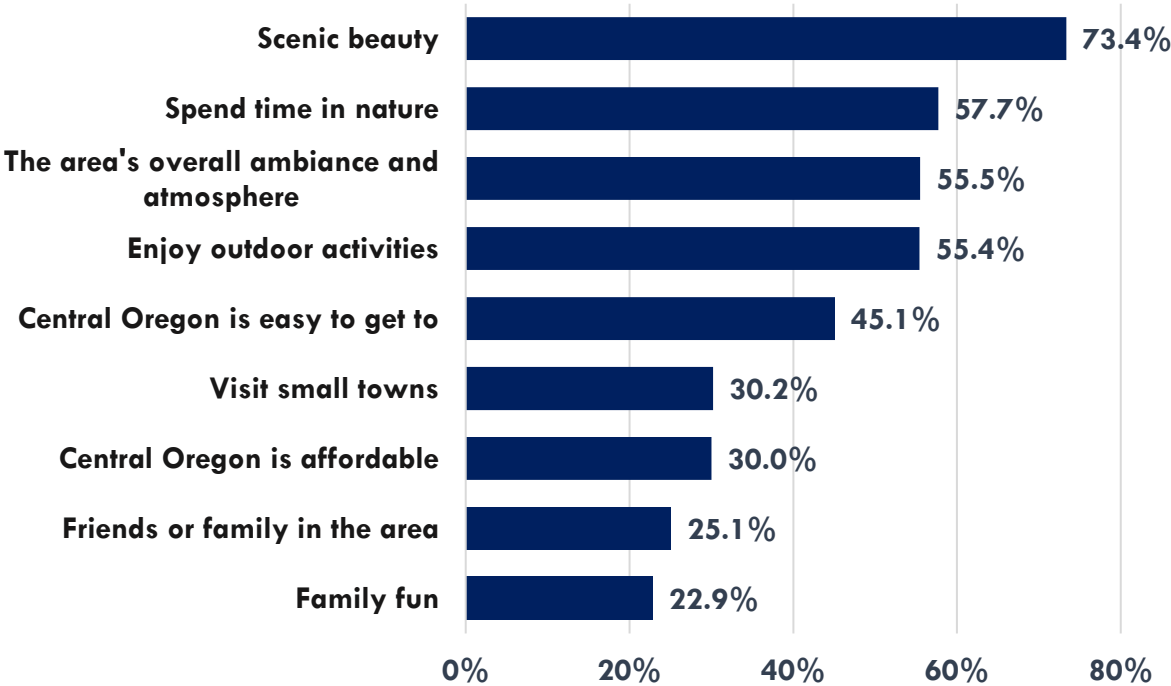
## Top Central Oregon Areas Visited

<b>Bend</b>	75.7%
<b>Sisters</b>	49.8%
<b>Redmond</b>	35.6%
<b>Sunriver</b>	31.6%

## Top Central Oregon Attractions Visited

<b>Deschutes River</b>	43.8%
<b>Crater Lake National Park</b>	23.1%
<b>Cascade Lake Scenic Byway</b>	19.8%
<b>Smith Rock State Park</b>	19.6%
<b>Mt. Bachelor</b>	17.2%

## Important Factors in Deciding to Visit Central Oregon



96.6%

**Satisfaction with Visitor Experience in Central Oregon**  
(Top 2 Box Score—Satisfied or Very Satisfied)



# NON-RECENT VISITORS

Respondents who did not visit Central Oregon within the past two years.

850 COMPLETED SURVEYS.

The summary at right describes the key characteristics of Non-Recent Visitors.

## KEY CHARACTERISTICS

- Non-recent visitors average 60.6 years in age and are less affluent than recent visitors (\$92,467). Non-recent visitors from the U.S. most commonly live in California (20.7%).
- Although they are relatively unfamiliar with Central Oregon, they rate Central Oregon highly as a place to visit, especially scenic beauty (94.4%). Nearly three-quarters or more also rate Central Oregon “good” or “very good” for a chance to “get away from it all,” outdoor recreation activities, off-the-beaten-path ambiance, restaurants and warm weather.
- Approximately 60 percent are likely to recommend Central Oregon as a place to visit for leisure and consider the region’s attractions exciting.
- Although the top deterrents are being too far from home, personal financial reasons and lack of personal vacation time, 18.7 percent reported that they simply “don’t know enough” about Central Oregon.

# NON-RECENT VISITORS *Who they are*



### Gender

Female: 55.4%

Male: 43.1%

Non-binary: 0.1%



### Marital Status

Married/partnered: 69.4%

Single: 24.8%

Children under 18: 9.9%



### Average Age: 60.6

Baby Boomers: 73.8%

Gen X: 20.0%

Millennials: 6.2%



### Ethnicity

Caucasian: 82.1%

Asian, Pacific Islander: 4.0%

Latino/Hispanic: 2.8%

**Combined Household Income: \$92,467**



# NON-RECENT VISITORS *Who they are*

## Top MSAs

Portland, OR-WA	11.9%
Seattle-Everett, WA	6.3%
San Francisco-Oakland, CA	4.2%
Los Angeles-Long Beach, CA	4.2%

## Top U.S. States

California	20.7%
Oregon	18.1%
Washington	13.7%
Texas	4.6%
Arizona	3.6%
Florida	3.0%

## Top Countries

United States	87.6%
Canada	6.6%
Germany	1.2%
United Kingdom	1.2%

## Important Factors for Planning a Leisure Trip to the Pacific Northwest



**96.8%**  
Scenic  
Beauty



**87.5%**  
Chance to "get  
away from it all"



**85.2%**  
Affordability



**81.9%**  
Restaurants  
& Food



**77.1%**  
Off the  
Beaten Path



**74.2%**  
Historic  
Attractions



**71.1%**  
Outdoor  
Recreation



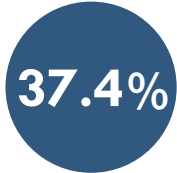
**66.1%**  
Iconic  
Attractions



**Have Visited  
Central Oregon in the Past**



**Familiarity with Attractions &  
Things to Do in Central Oregon**  
(Top 2 Box Score—Mostly Familiar  
or Extremely Familiar)



**Have Not Visited  
Central Oregon in the Past**



**Excitement about Attractions &  
Things to Do in Central Oregon**  
(Top 2 Box Score—Mostly Exciting  
or Extremely Exciting)



## Top Attributes of Central Oregon (Top 2 Box Score—Good or Very Good)

Scenic beauty	94.4%
Chance to “get away from it all”	88.9%
Outdoor recreation activities	85.3%
Off the beaten path ambiance	83.2%
Restaurants and food	77.3%
Warm, sunny weather	72.1%

## Top Deterrents to Visiting Central Oregon

Too far from home	26.1%
Personal financial reasons	24.5%
Lack of personal vacation time	20.1%
I don't know enough about it	18.7%
No friends/family in the area	16.2%

A scenic view of a waterfall cascading into a rocky stream, surrounded by dense evergreen forest. The waterfall is the central focus, with water falling from a rocky ledge into a stream that flows over numerous large, dark rocks. The surrounding forest is lush and green, with tall evergreen trees framing the scene. The overall atmosphere is serene and natural.

# DETAILED SURVEY FINDINGS

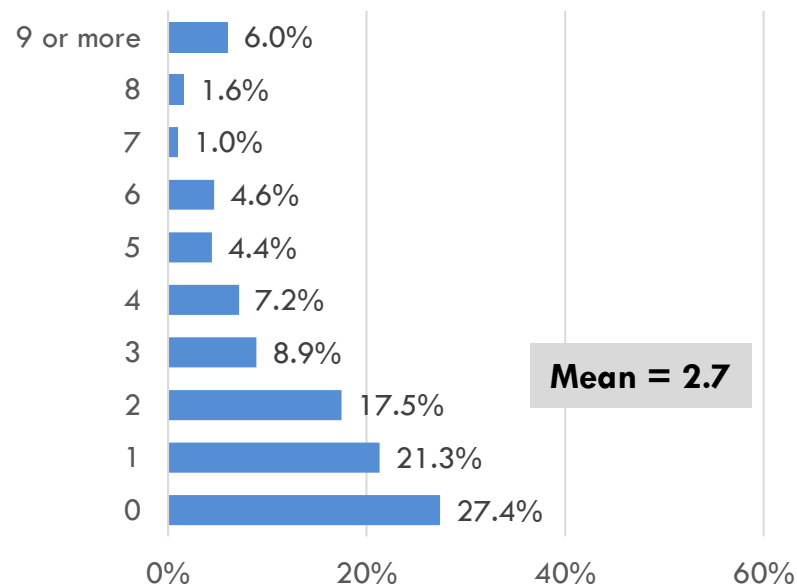


# TRAVEL TO CENTRAL OREGON

# TRIPS TO CENTRAL OREGON IN THE PAST TWO YEARS

Survey respondents who live outside Central Oregon took an average of 2.7 trips to Central Oregon within the past two years. Excluding non-recent visitors, the average for recent visitors climbs to nearly 4 trips (3.7), led by Fall and Winter visitors.

Figure 1: Trips to Central Oregon in the Past Two Years



Question: How many trips to Central Oregon have you taken in the past two years?  
 Base: All potential visitors. 3,100 completed surveys.

Detail by Season and Visitation

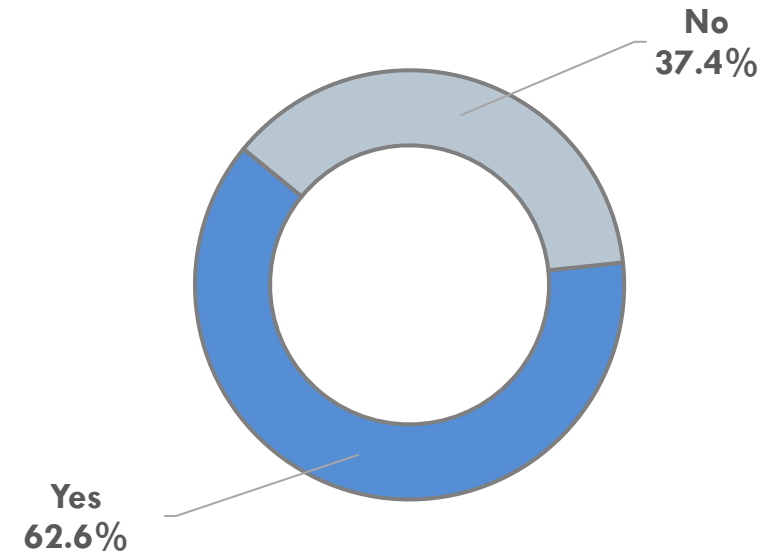
	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
9 or more	8.3%	0.0%	7.3%	7.8%	9.9%	6.8%
8	2.2%	0.0%	1.8%	2.2%	2.5%	1.7%
7	1.4%	0.0%	1.1%	1.7%	1.2%	0.0%
6	6.4%	0.0%	4.7%	5.6%	7.5%	11.1%
5	6.1%	0.0%	6.2%	6.1%	5.1%	12.0%
4	9.9%	0.0%	7.6%	9.4%	10.0%	18.8%
3	12.3%	0.0%	10.5%	12.8%	12.0%	12.0%
2	24.1%	0.0%	24.4%	24.7%	23.9%	17.9%
1	29.4%	0.0%	36.4%	29.6%	27.9%	19.7%
0	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%
Mean	3.7	0.0	3.4	3.7	4.0	4.1
Base	2,250	850	275	1,169	689	117

# PAST VISITATION TO CENTRAL OREGON

Almost two-thirds (62.6%) of potential visitors who did not travel to Central Oregon in the past two years have previously visited the destination.

Question: Have you ever visited Central Oregon? (Select one)  
Base: All potential visitors who did not visit in the past two years. 850 completed surveys.

Figure 2: Past Visitation to Central Oregon







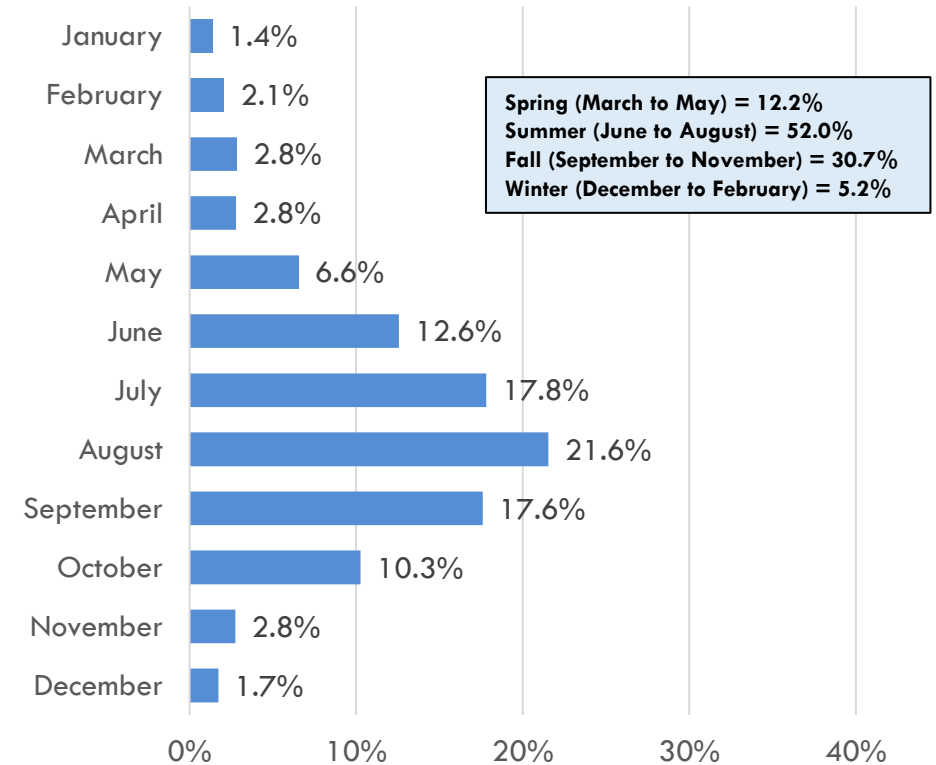
# **THE CENTRAL OREGON TRIP**

**This section presents the Central Oregon trip details for Recent Visitors who traveled to the region within the past two years.**

# MONTH OF TRIP

By season, more than half (52.0%) of recent visitors came to Central Oregon in the Summer months of June, July, and August. Fall is also important, especially September, when the region hosted more visitors than in June.

Figure 3: Month of Trip

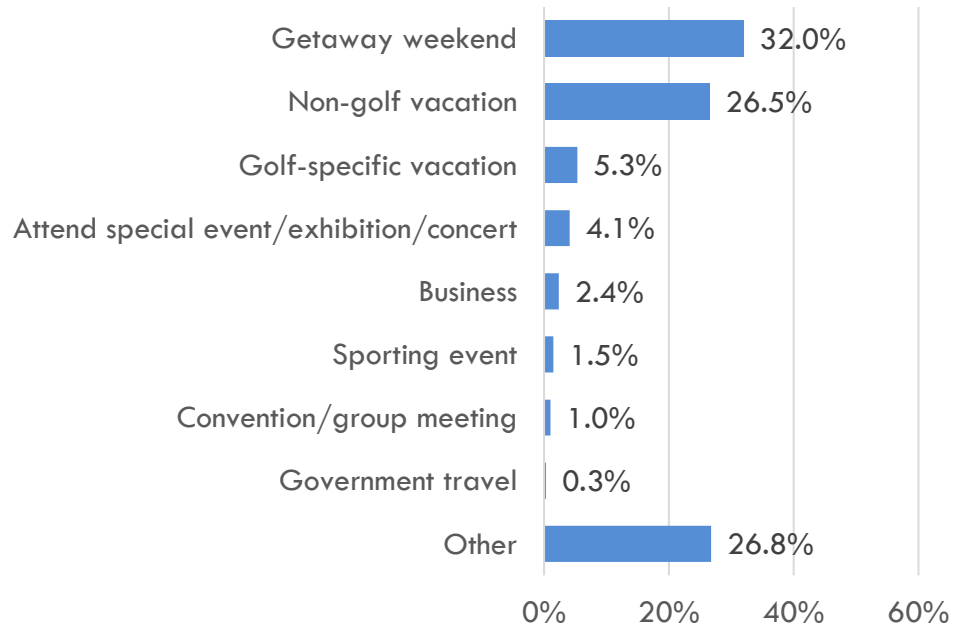


Question: In which month and year did you take this trip to Central Oregon? (Select one)  
Base: All recent visitors. 2,250 completed surveys.

# PRIMARY PURPOSE OF TRIP

The vast majority of recent visitors came for leisure purposes. More than half (58.5%) of visitors to Central Oregon came for either a weekend getaway (32.0%) or general (non-golf) vacation (26.5%). Except in Summer, when travelers are just as likely to take a vacation as they would a getaway weekend, getaway weekends exceed all other purposes for taking a trip to Central Oregon.

Figure 4: Primary Purpose of Trip



Question: Which best describes the primary reason for this trip? (Select one)  
 Base: All recent visitors. 2,250 completed surveys.

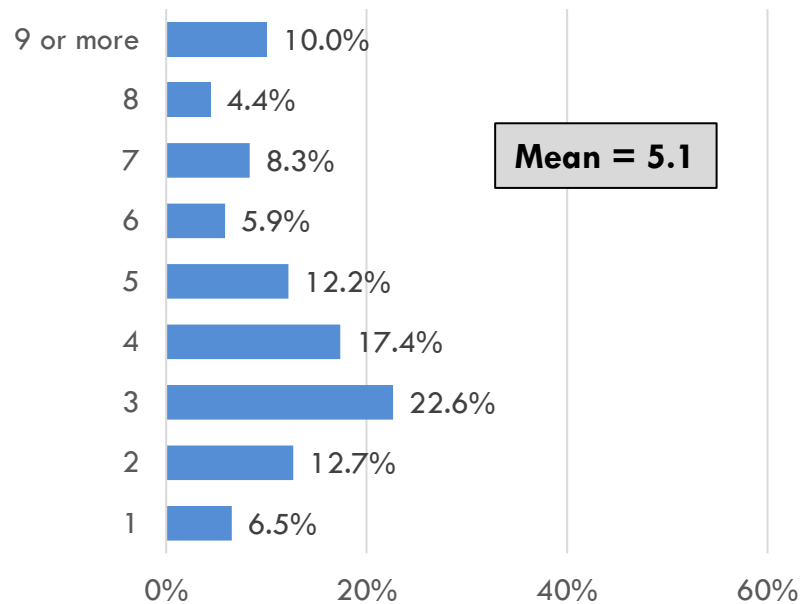
Detail by Season

	Spring	Summer	Fall	Winter
Getaway weekend	33.5%	29.3%	34.3%	41.9%
Non-golf vacation	22.5%	30.8%	21.8%	21.4%
Golf-specific vacation	4.0%	5.0%	7.3%	0.9%
Attend special event/exhibition/concert	3.6%	4.7%	3.9%	0.9%
Business	4.7%	1.6%	2.9%	0.9%
Sporting event	0.7%	1.5%	1.5%	3.4%
Convention/group meeting	0.7%	0.7%	1.7%	0.9%
Government travel	0.0%	0.3%	0.3%	0.9%
Other	30.2%	26.0%	26.4%	29.1%
Base	275	1,169	689	117

# DAYS IN CENTRAL OREGON

Recent visitors spent an average of 5.1 days in Central Oregon during their trip. Summer visitors, who are more likely than visitors in other seasons to be on a vacation rather than a getaway weekend, spent the most time in the region (5.3 days), followed closely by Fall visitors (5.0 days).

Figure 5: Days in Central Oregon



Question: How many days and nights did you spend in Central Oregon on this trip? (Days)  
 Base: All recent visitors. 2,250 completed surveys.

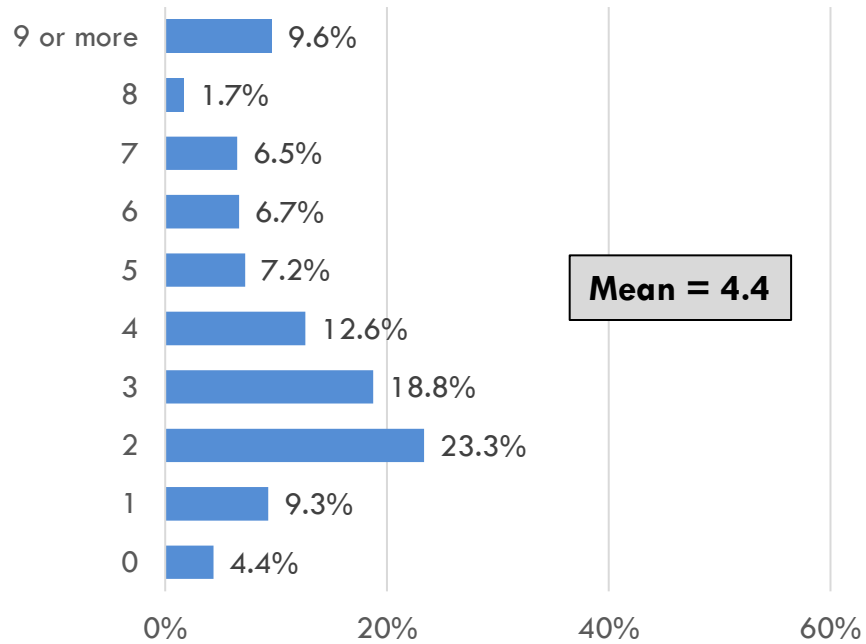
Detail by Season

	Spring	Summer	Fall	Winter
9 or more	6.5%	11.0%	10.6%	5.1%
8	1.8%	6.0%	2.8%	4.3%
7	7.6%	8.8%	7.7%	8.5%
6	4.0%	6.5%	5.7%	5.1%
5	12.0%	12.5%	11.6%	12.8%
4	15.3%	16.5%	19.3%	19.7%
3	26.9%	20.9%	23.1%	27.4%
2	16.7%	11.5%	12.9%	12.8%
1	9.1%	6.2%	6.4%	4.3%
Mean	4.3	5.3	5.0	4.7
Base	275	1,169	689	117

# NIGHTS IN CENTRAL OREGON

Recent visitors spent an average of 4.4 nights in Central Oregon. As noted for number of days, Summer (4.6 nights) and Fall (4.3 nights) visitors spent more nights in the destination compared to Spring and Winter visitors.

Figure 6: Nights in Central Oregon



Question: How many days and nights did you spend in Central Oregon on this trip? (Nights)  
 Base: All recent visitors. 2,250 completed surveys.

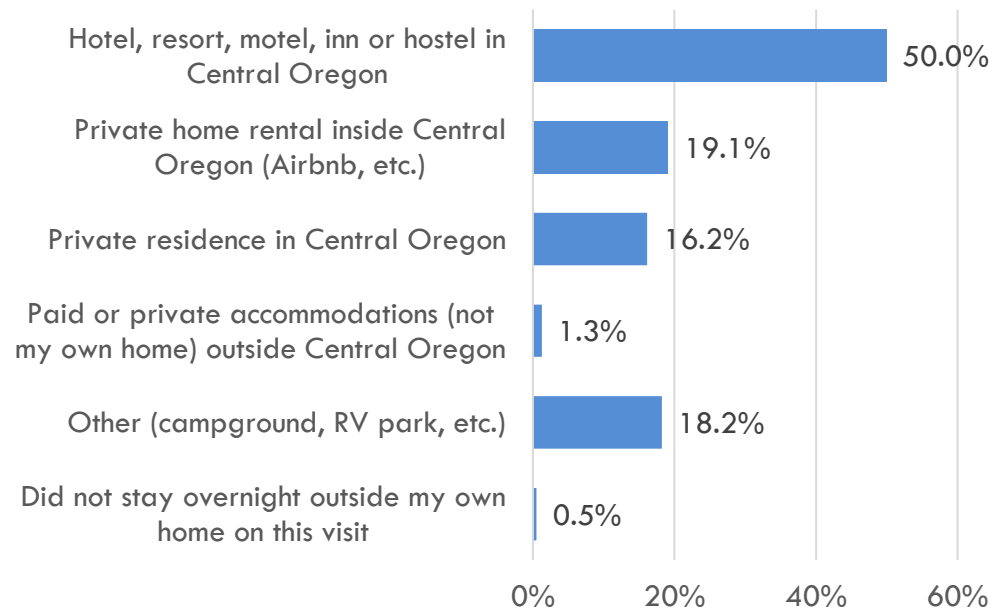
Detail by Season

	Spring	Summer	Fall	Winter
9 or more	7.3%	10.4%	9.9%	5.1%
8	1.8%	2.0%	1.5%	0.0%
7	2.9%	7.9%	5.7%	6.0%
6	5.1%	7.8%	5.1%	8.5%
5	6.2%	7.2%	7.7%	6.8%
4	9.5%	13.1%	12.9%	13.7%
3	17.8%	18.0%	20.0%	21.4%
2	30.9%	20.4%	24.4%	28.2%
1	13.8%	8.6%	9.0%	7.7%
0	4.7%	4.7%	3.9%	2.6%
Mean	3.6	4.6	4.3	4.0
Base	275	1,169	689	117

# PLACE OF STAY

**Half of all recent overnight visitors stayed in a commercial lodging.** Private home rentals (19.1%), campgrounds/RV parks/etc. (18.2%), and private residences (16.2%) primarily account for remaining half. Hotels dominate in all seasons, however, a third of Winter visitors stayed in private home rentals and nearly a quarter of Summer visitors stayed in campgrounds/RV parks.

**Figure 7: Place of Stay**



Question: Where did you stay during this trip? (Select all that apply)  
 Base: All overnight recent visitors. 2,152 completed surveys.

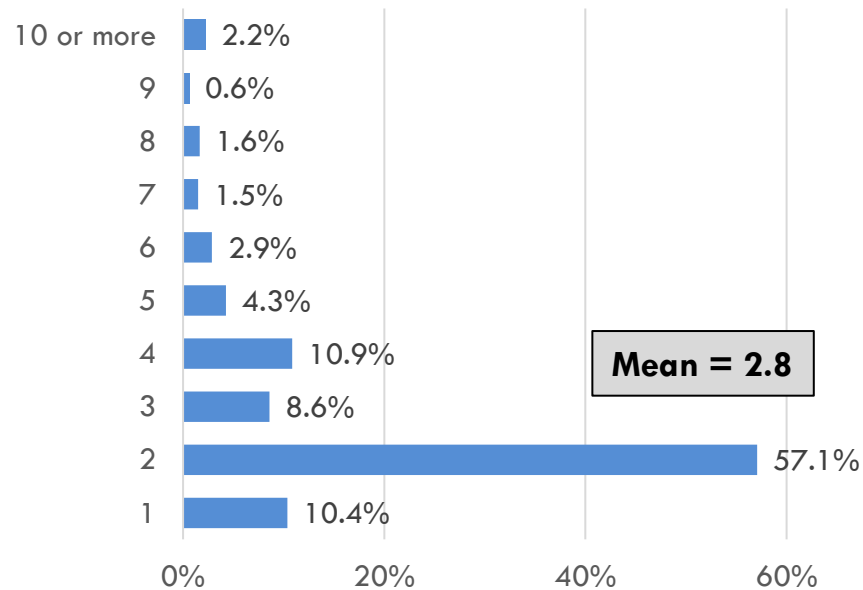
**Detail by Season**

	Spring	Summer	Fall	Winter
Hotel, resort, motel, inn or hostel in Central Oregon	58.0%	47.6%	52.1%	42.1%
Private home rental inside Central Oregon (Airbnb, etc.)	15.6%	18.9%	18.1%	34.2%
Private residence in Central Oregon	13.0%	15.2%	18.4%	20.2%
Paid or private accommodations (not my own home) outside Central Oregon	1.5%	1.4%	1.1%	0.0%
Other (campground, RV park, etc.)	14.5%	22.8%	14.5%	3.5%
Did not stay overnight outside my own home on this visit	0.4%	0.4%	0.8%	0.0%
<b>Base</b>	<b>262</b>	<b>1,114</b>	<b>662</b>	<b>114</b>

# NUMBER OF PEOPLE IN ROOM/RENTAL

**On average, 2.8 people stayed in a room or rental in Central Oregon.** Recent overnight visitors who stayed in commercial lodging or a rental in Central Oregon noted more occupants in Summer and Winter than in Spring and Fall, consistent with the larger travel party (and more children) during those seasons.

**Figure 8: Number of People in Room/Rental**



Question: Including yourself, how many people stayed in your room or rental? (Select one)  
 Base: All overnight recent visitors who stayed in a hotel or home rental in Central Oregon.  
 1,456 completed surveys.

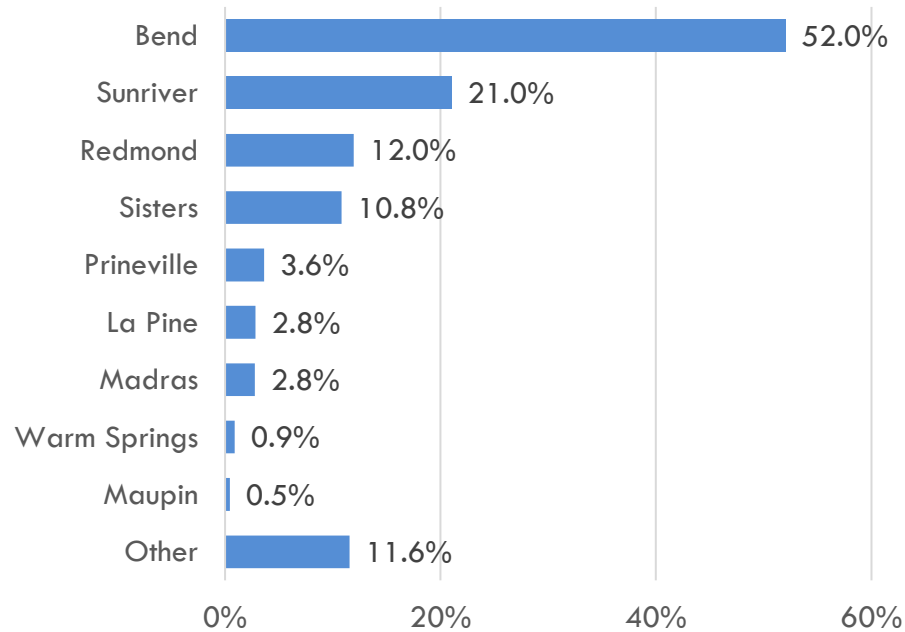
**Detail by Season**

	Spring	Summer	Fall	Winter
10 or more	2.1%	2.6%	0.9%	5.8%
9	0.0%	1.0%	0.2%	1.2%
8	1.0%	2.2%	0.4%	4.7%
7	1.6%	1.4%	0.9%	5.8%
6	2.1%	3.7%	2.0%	2.3%
5	3.1%	5.0%	3.5%	4.7%
4	6.8%	12.7%	9.5%	11.6%
3	9.9%	9.5%	5.9%	11.6%
2	57.1%	54.0%	64.2%	45.3%
1	16.2%	7.9%	12.5%	7.0%
Mean	2.6	3.0	2.5	3.6
Base	191	724	455	86

# AREA OF STAY

Half (52.0%) of Central Oregon visitors stayed overnight in Bend, while one-in-five stayed in Sunriver.

Figure 9: Area of Stay



Question: In which part of Central Oregon did you stay overnight? (Select all that apply)  
 Base: All recent visitors who stayed overnight in Central Oregon. 1,764 completed surveys.

Detail by Season

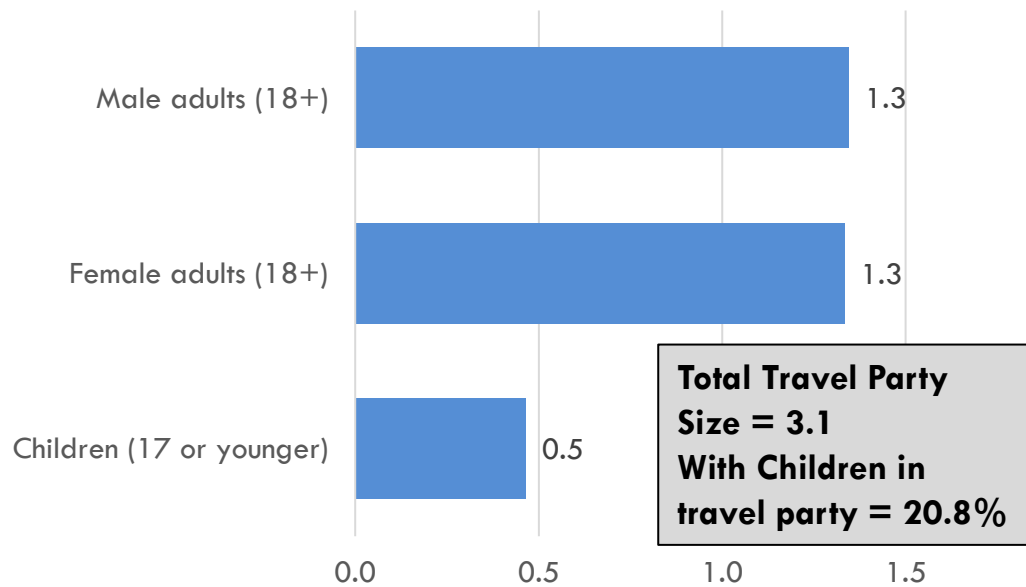
	Spring	Summer	Fall	Winter
Bend	54.3%	52.4%	50.4%	53.2%
Sunriver	14.9%	21.1%	22.2%	26.6%
Redmond	12.2%	12.6%	12.4%	3.7%
Sisters	13.6%	9.8%	11.0%	12.8%
Prineville	3.6%	3.4%	4.6%	0.0%
La Pine	2.7%	3.1%	2.5%	2.8%
Madras	2.3%	3.1%	3.0%	0.0%
Warm Springs	1.4%	0.8%	1.1%	0.0%
Maupin	0.5%	0.5%	0.5%	0.0%
Other	12.7%	12.1%	11.5%	5.5%
Base	221	871	563	109



# TRAVEL PARTY COMPOSITION

The typical travel party to Central Oregon consists of 3.1 persons, split equally between males and females (1.3) with relatively few (0.5) children. Summer and Winter visitors tend to have larger travel parties (3.4 and 3.8, respectively) and were more likely to travel with children.

Figure 10: Travel Party Composition



Question: Including yourself, how many male and female adults and children were in your travel party? Base: All recent visitors. 2,250 completed surveys.

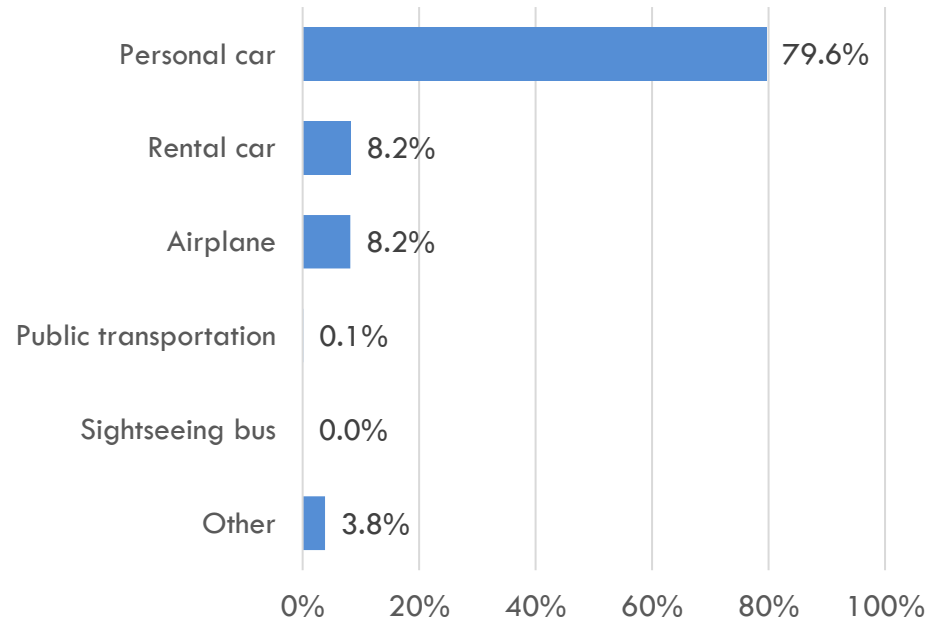
Detail by Season

	Spring	Summer	Fall	Winter
Male adults (18+)	1.4	1.3	1.3	1.6
Female adults (18+)	1.2	1.4	1.2	1.6
Children (17 or younger)	0.3	0.6	0.2	0.7
<b>Total Travel Party Size</b>	<b>2.9</b>	<b>3.4</b>	<b>2.7</b>	<b>3.8</b>
<b>Percent with Children in Their Travel Party</b>	<b>14.5%</b>	<b>26.9%</b>	<b>10.4%</b>	<b>34.2%</b>
<b>Base</b>	<b>275</b>	<b>1,169</b>	<b>689</b>	<b>117</b>

# METHOD OF ARRIVAL

The vast majority of recent visitors arrived in Central Oregon via personal car (79.6%).

Figure 11: Method of Arrival



Question: How did you arrive in Central Oregon? (Select one)  
 Base: All recent visitors. 2,250 completed surveys.

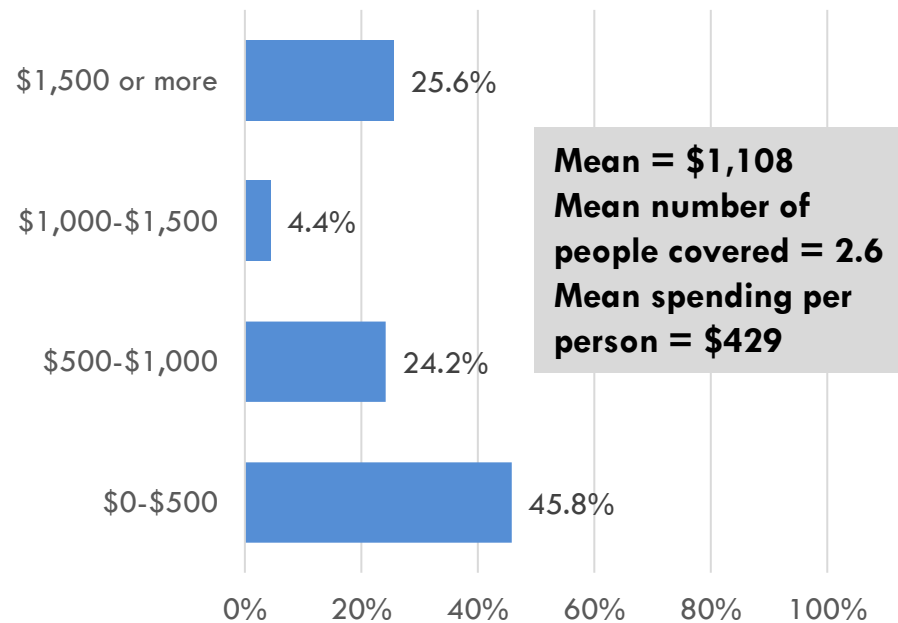
Detail by Season

	Spring	Summer	Fall	Winter
Personal car	80.4%	80.6%	77.6%	80.3%
Rental car	9.5%	8.1%	8.4%	5.1%
Airplane	7.3%	6.7%	10.4%	12.0%
Public transportation	0.0%	0.2%	0.0%	0.0%
Sightseeing bus	0.0%	0.1%	0.0%	0.0%
Other	2.9%	4.4%	3.5%	2.6%
Base	275	1,169	689	117

# SPENDING IN CENTRAL OREGON

The average travel party to Central Oregon spent \$1,108 on their trip. Summer (\$1,224) and Winter (\$1,233) visitors spent more than Spring and Fall visitors, consistent with their larger travel party sizes and longer trip length. This reported spending covered an average of 2.6 visitors. Thus, it is estimated that the typical visitor spent \$429 in Central Oregon during their trip. Summer visitors represent the highest per person spending (\$445).

Figure 12: Spending in Central Oregon



Question: IN TOTAL, approximately how much did you spend while in Central Oregon?  
 Please only include spending in Central Oregon and exclude any spending outside Central Oregon. Base: All recent visitors. 2,191 completed surveys.

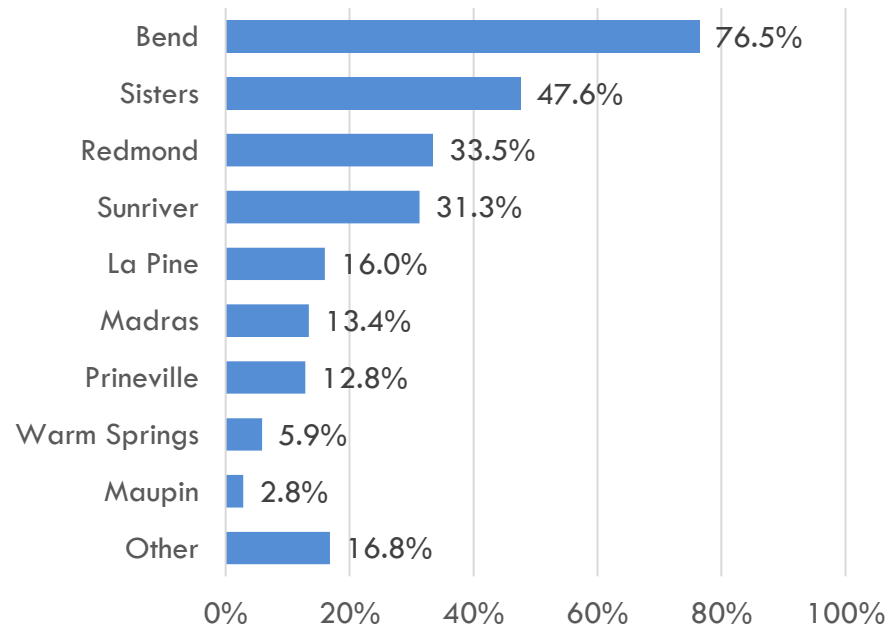
Detail by Season

	Spring	Summer	Fall	Winter
\$1,500 or more	20.4%	28.0%	22.6%	30.4%
\$1,000-\$1,500	6.7%	3.6%	4.5%	7.0%
\$500-\$1,000	20.8%	24.7%	25.4%	20.0%
\$0-\$500	52.0%	43.7%	47.5%	42.6%
Mean	\$884	\$1,224	\$979	\$1,233
Mean number of people covered by spending	2.4	2.8	2.3	3.1
Mean spending per person	\$373	\$445	\$428	\$402
Base	275	1,169	689	117

# CENTRAL OREGON AREAS VISITED

**Three-quarters (76.5%) of recent visitors went to Bend as part of their Central Oregon trip.** Half (47.6%) visited Sisters while a third went to Redmond (33.5%) and/or Sunriver (31.3%). Over one-in-ten went to La Pine (16.0%), Madras (13.4%) and/or Prineville (12.8%). With the exception of Bend, Sisters and Sunriver, visitation to each Central Oregon community declines notably in the winter season.

**Figure 13: Central Oregon Areas Visited**



Question: Which of the following Central Oregon towns/cities did you visit as a part of this trip? (Select all that apply) Base: All recent visitors. 2,250 completed surveys.

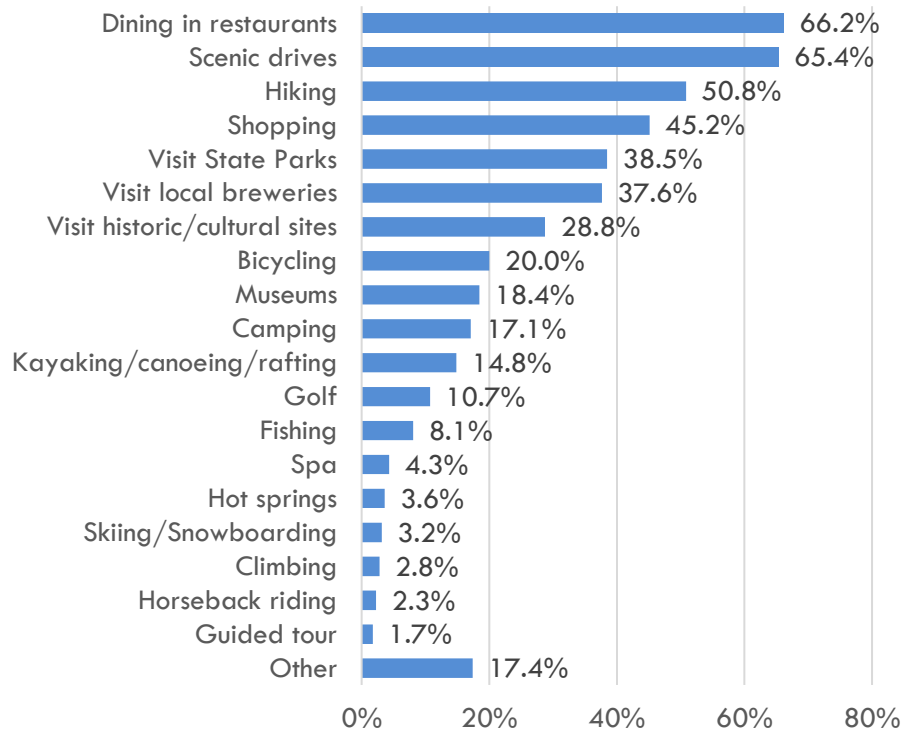
**Detail by Season**

	Spring	Summer	Fall	Winter
Bend	76.0%	75.6%	77.5%	81.2%
Sisters	42.2%	49.4%	47.0%	45.3%
Redmond	36.0%	31.7%	36.6%	27.4%
Sunriver	22.9%	32.2%	32.1%	37.6%
La Pine	12.0%	17.8%	15.7%	9.4%
Madras	12.7%	13.3%	15.1%	6.8%
Prineville	11.6%	12.4%	15.1%	6.8%
Warm Springs	6.9%	5.9%	5.8%	4.3%
Maupin	2.9%	3.2%	2.5%	1.7%
Other	18.5%	18.0%	15.2%	11.1%
Base	275	1,169	689	117

# ACTIVITIES IN CENTRAL OREGON

Visitors participated in a variety of activities while in Central Oregon, with dining (66.2%) and scenic drives (65.4%) topping the list. Half of recent visitors went hiking during their trip (50.8%). Some activities correlate with the season – breweries seem relatively more popular in Winter as do, of course, skiing and snowboarding. Visitation to the region’s state parks is highest during the Spring, Summer and Fall.

**Figure 14: Activities in Central Oregon**



Question: Which of these activities did you participate in during this trip? (Select all that apply) Base: All recent visitors. 2,250 completed surveys.

**Detail by Season**

	Spring	Summer	Fall	Winter
Dining in restaurants	68.7%	65.1%	66.8%	68.4%
Scenic drives	67.3%	67.0%	65.0%	47.0%
Hiking	39.3%	54.2%	51.4%	41.0%
Shopping	43.6%	47.4%	42.7%	41.0%
Visit State Parks	38.9%	40.5%	38.6%	17.1%
Visit local breweries	34.2%	38.2%	36.7%	45.3%
Visit historic/cultural sites	26.9%	31.2%	28.2%	12.0%
Bicycling	14.9%	24.0%	16.8%	11.1%
Museums	16.7%	20.2%	16.8%	14.5%
Camping	13.1%	22.0%	12.3%	6.0%
Kayaking/canoeing/rafting	5.8%	21.0%	9.9%	4.3%
Golf	7.3%	11.1%	12.8%	2.6%
Fishing	5.5%	9.5%	7.5%	3.4%
Spa	4.4%	3.4%	5.5%	6.0%
Hot springs	5.1%	3.8%	2.8%	2.6%
Skiing/Snowboarding	5.1%	0.2%	0.7%	42.7%
Climbing	2.2%	3.1%	2.8%	1.7%
Horseback riding	1.8%	3.1%	1.3%	0.9%
Guided tour	1.1%	2.1%	1.5%	1.7%
Other	17.8%	17.3%	17.9%	15.4%
Base	275	1,169	689	117

# ATTRACTIONS VISITED

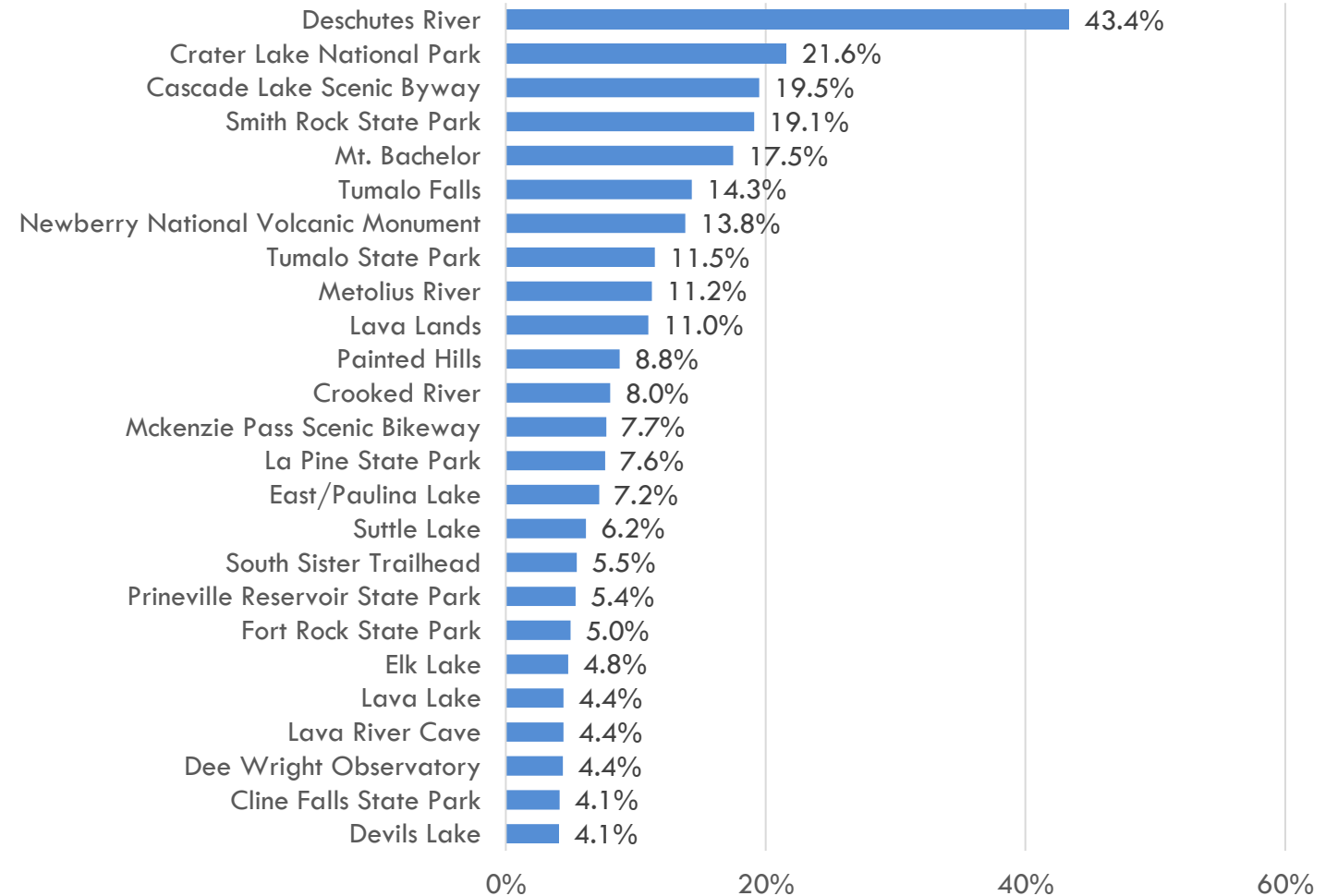
The Deschutes River was, by far, the most visited Central Oregon attraction, followed by Crater Lake National Park (21.6%). One in five visitors also went to Cascade Lake Scenic Byway (19.5%), Smith Rock State Park (19.1%) and/or Mt. Bachelor (17.5%).

Summer visitors enjoyed more variety, going to 3.3 attractions during their visit on average. In contrast, fewer winter visitors went to each attraction (averaging 1.9), with the Mt. Bachelor ski and snowboard resort hosting, by far, the largest share (53.8%).

Full list of attractions tested is presented on the following page.

Question: Which of these attractions did you visit during this trip to Central Oregon? (Select all that apply)  
 Base: All recent visitors. 2,250 completed surveys.

Figure 15: Attractions Visited



# ATTRACTIONS VISITED

## Detail by Season

	Spring	Summer	Fall	Winter
Deschutes River	39.6%	46.0%	41.7%	35.9%
Crater Lake National Park	20.4%	24.4%	19.9%	6.8%
Cascade Lake Scenic Byway	17.1%	22.7%	17.3%	6.8%
Smith Rock State Park	19.6%	18.8%	19.9%	16.2%
Mt. Bachelor	16.7%	15.9%	14.4%	53.8%
Tumalo Falls	11.3%	15.3%	14.8%	8.5%
Newberry National Volcanic Monument	9.5%	16.1%	13.6%	2.6%
Tumalo State Park	6.9%	12.4%	12.5%	6.8%
Metolius River	8.0%	12.7%	10.7%	7.7%
Lava Lands	6.2%	12.6%	11.8%	1.7%
Painted Hills	11.3%	8.4%	9.6%	1.7%
Crooked River	9.1%	8.1%	8.9%	0.0%
Mckenzie Pass Scenic Bikeway	4.7%	9.1%	7.5%	2.6%
La Pine State Park	8.7%	8.6%	6.5%	1.7%
East/Paulina Lake	4.4%	9.1%	5.8%	3.4%
Suttle Lake	2.9%	7.8%	5.4%	2.6%
South Sister Trailhead	4.0%	5.9%	5.8%	2.6%
Prineville Reservoir State Park	5.1%	6.0%	5.2%	0.9%
Base	275	1,169	689	117

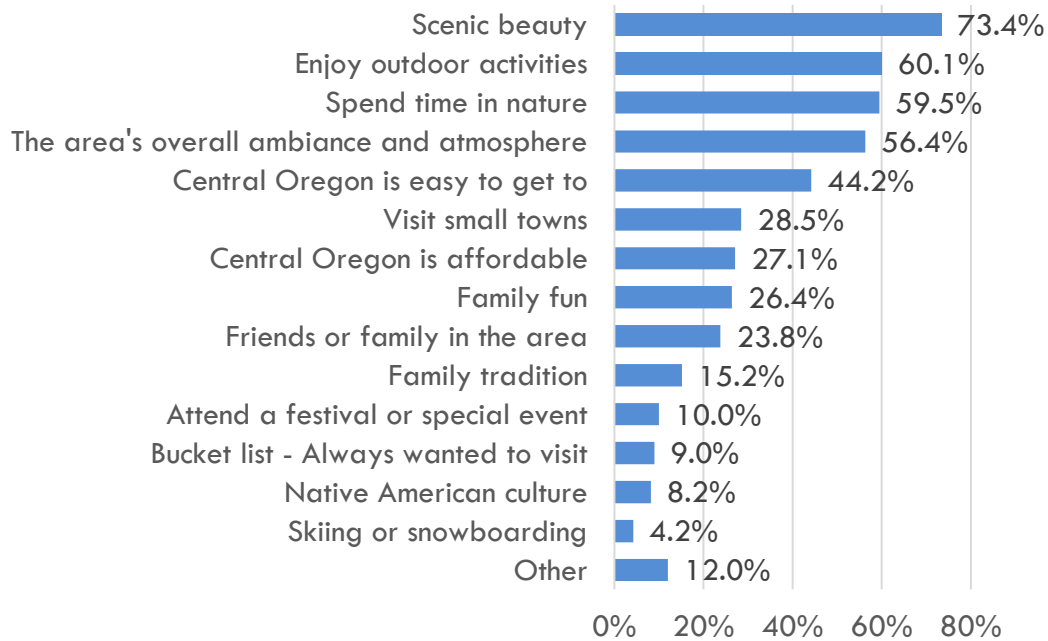
	Spring	Summer	Fall	Winter
Fort Rock State Park	6.2%	4.8%	5.5%	0.9%
Elk Lake	2.5%	6.7%	3.2%	0.9%
Lava Lake	5.1%	4.6%	4.4%	1.7%
Lava River Cave	4.0%	5.6%	3.2%	0.9%
Dee Wright Observatory	1.5%	5.1%	5.1%	0.0%
Cline Falls State Park	4.4%	3.5%	5.4%	2.6%
Devils Lake	3.6%	5.0%	3.2%	0.9%
Lake Billy Chinook	2.5%	4.4%	3.9%	0.9%
Lava Cast Forest	3.6%	3.7%	4.5%	1.7%
Fall River	3.3%	3.1%	5.2%	2.6%
Broken Top	1.8%	3.0%	3.3%	1.7%
Crane Prairie Reservoir	1.8%	2.7%	2.6%	0.9%
White River Falls State Park	4.0%	2.5%	2.0%	1.7%
Hosmer Lake	0.7%	2.6%	2.2%	0.9%
Cultus Lake	0.7%	2.9%	1.5%	0.9%
Proxy Falls	1.1%	2.0%	2.6%	0.0%
Steelhead Falls	3.3%	1.9%	1.7%	0.0%
Hoodoo Ski Area	3.3%	1.5%	0.9%	6.0%
Green Lakes	0.0%	2.1%	1.6%	0.0%
Madras Mountainview Scenic Bikeway	2.2%	1.1%	1.6%	0.9%
Summer Lake Hot Springs	1.5%	1.5%	0.7%	0.0%
Base	275	1,169	689	117

Question: Which of these attractions did you visit during this trip to Central Oregon? (Select all that apply) Base: All recent visitors. 2,250 completed surveys.

# FACTORS IMPORTANT TO VISITING CENTRAL OREGON

Central Oregon’s scenic beauty was the top driver of visitation to the region, followed by outdoor activities, spending time in nature, and the region’s overall ambiance and atmosphere. Many also cited Central Oregon’s ease of access as an important reason contributing to their decision to visit (44.2%). Additionally, about a quarter cited the small towns, affordability, family fun, and visiting friends/family as important factors. While Winter visitors agree with visitors from other seasons that the beauty and outdoor/nature characteristics are important, they were much more likely to consider skiing/snowboarding important, consistent with their trip activities and attractions visited.

**Figure 16: Factors Important to Visiting Central Oregon**



Question: Which of the following were IMPORTANT to your decision to visit Central Oregon? (Select all that apply) Base: All recent visitors. 2,250 completed surveys.

**Detail by Season**

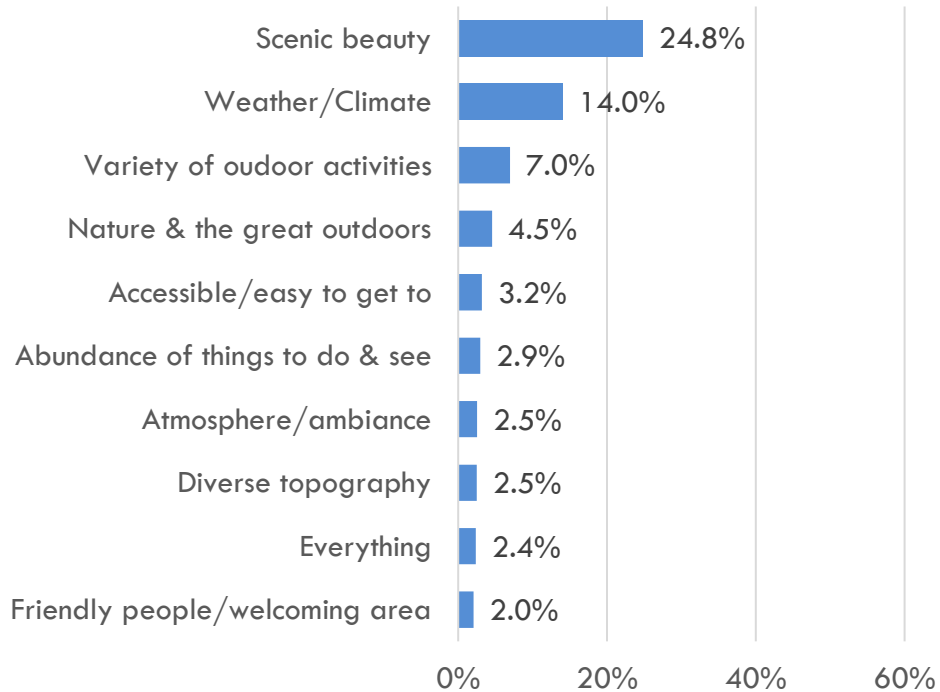
	Spring	Summer	Fall	Winter
Scenic beauty	70.2%	75.6%	72.9%	62.4%
Enjoy outdoor activities	52.0%	63.6%	58.5%	53.8%
Spend time in nature	57.5%	61.7%	58.1%	50.4%
The area's overall ambiance and atmosphere	53.5%	57.5%	55.2%	59.0%
Central Oregon is easy to get to	41.1%	46.2%	42.4%	42.7%
Visit small towns	28.7%	29.9%	28.2%	16.2%
Central Oregon is affordable	30.5%	27.3%	26.3%	22.2%
Family fun	17.8%	33.0%	18.7%	25.6%
Friends or family in the area	23.6%	23.3%	25.0%	23.1%
Family tradition	9.5%	18.2%	11.9%	17.9%
Attend a festival or special event	9.8%	9.8%	11.0%	6.8%
Bucket list - Always wanted to visit	9.8%	9.2%	8.4%	7.7%
Native American culture	12.0%	7.8%	7.8%	5.1%
Skiing or snowboarding	4.0%	1.7%	2.2%	41.9%
Other	13.5%	9.9%	14.9%	12.0%
Base	275	1,169	689	117



# MOST LIKED ASPECTS OF CENTRAL OREGON

As scenic beauty was a top driver for visitation, it was also the most liked aspect of the region. In an open-ended question, recent visitors were asked to write in what they most liked about Central Oregon. A quarter cited “scenic beauty,” followed by 14.0 percent who wrote in “weather/climate.”

Figure 17: Most Liked Aspects of Central Oregon



Question: What do you like most about Central Oregon?  
 Base: All recent visitors. 2,114 completed surveys.

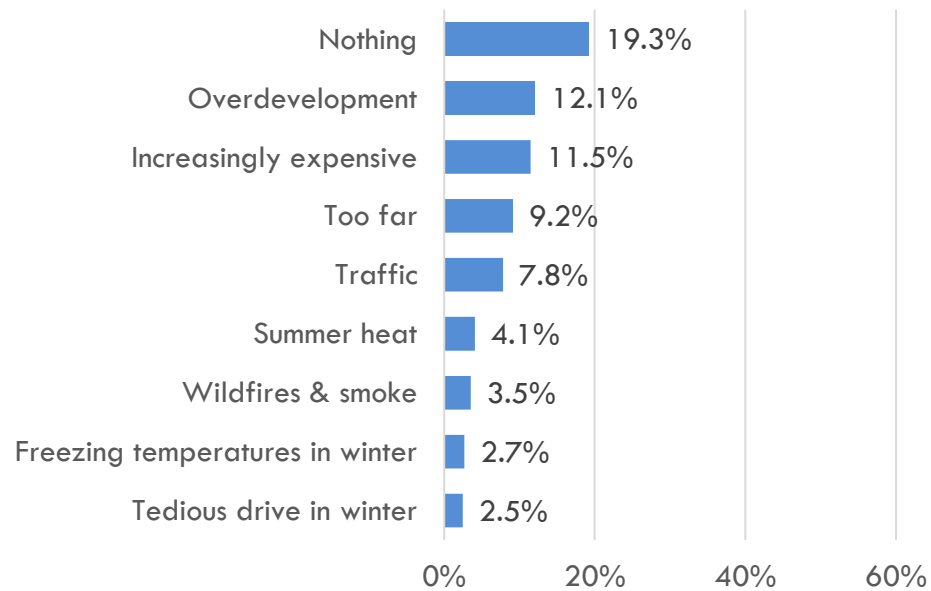
Detail by Season

	Spring	Summer	Fall	Winter
Scenic beauty	24.7%	25.1%	25.3%	18.3%
Weather/Climate	10.3%	15.0%	14.5%	11.0%
Variety of outdoor activities	6.1%	6.9%	5.9%	15.6%
Nature & the great outdoors	4.9%	4.4%	4.6%	4.6%
Accessible/easy to get to	3.0%	3.2%	2.9%	4.6%
Abundance of things to do & see	3.4%	3.0%	2.8%	1.8%
Atmosphere/ambiance	3.8%	2.4%	2.2%	2.8%
Diverse topography	1.9%	2.6%	2.9%	0.0%
Everything	3.0%	2.6%	2.0%	0.0%
Friendly people/welcoming area	2.7%	1.6%	2.3%	3.7%
Base	263	1,095	647	109

# LEAST LIKED ASPECTS OF CENTRAL OREGON

When asked what recent visitors liked least about Central Oregon, the top response was “nothing.” However, among the tangible aspects that were disliked, about one-in-ten wrote in “overdevelopment” and “increasingly expensive” as their least liked aspects of Central Oregon (12.1% and 11.5%, respectively). Similar percentages also reported “too far” (9.2%) and “traffic” (7.8%).

**Figure 18: Least Liked Aspects of Central Oregon**



Question: What do you like least about Central Oregon?  
 Base: All recent visitors. 1,890 completed surveys.

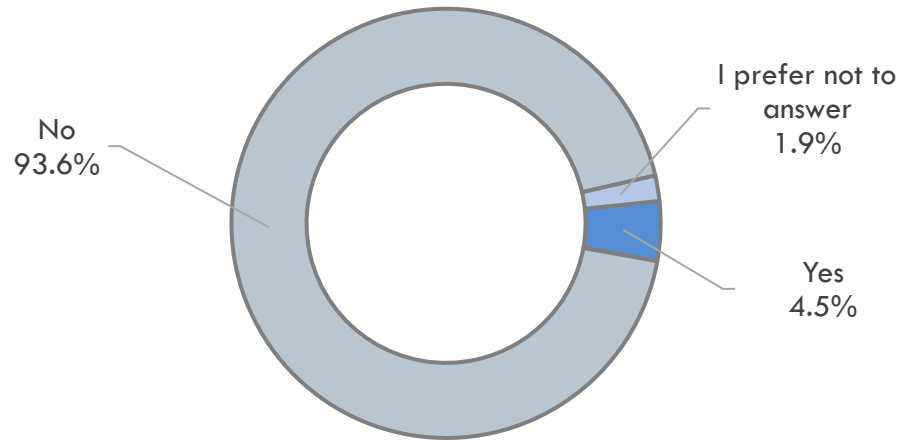
**Detail by Season**

	Spring	Summer	Fall	Winter
Nothing	21.7%	19.0%	19.2%	16.3%
Increasingly expensive	13.0%	10.0%	13.1%	13.3%
Overdevelopment	11.3%	12.0%	12.1%	14.3%
Too far	10.0%	9.1%	8.6%	11.2%
Traffic	6.5%	8.1%	7.7%	9.2%
Summer heat	5.2%	4.6%	3.1%	1.0%
Wildfires & smoke	0.4%	4.6%	3.1%	2.0%
Freezing temperatures in winter	4.3%	2.0%	3.7%	0.0%
Tedious drive in winter	3.0%	2.2%	2.6%	3.1%
Base	230	990	572	98

# ADA ACCESSIBILITY NEEDS

Under 5 percent of recent visitors acknowledged a need for ADA accessibility within their travel party.

Figure 19: ADA Accessibility Needs



Question: Did you or anyone in your travel party have ADA accessibility needs?  
 Base: All recent visitors. 2,250 completed surveys.

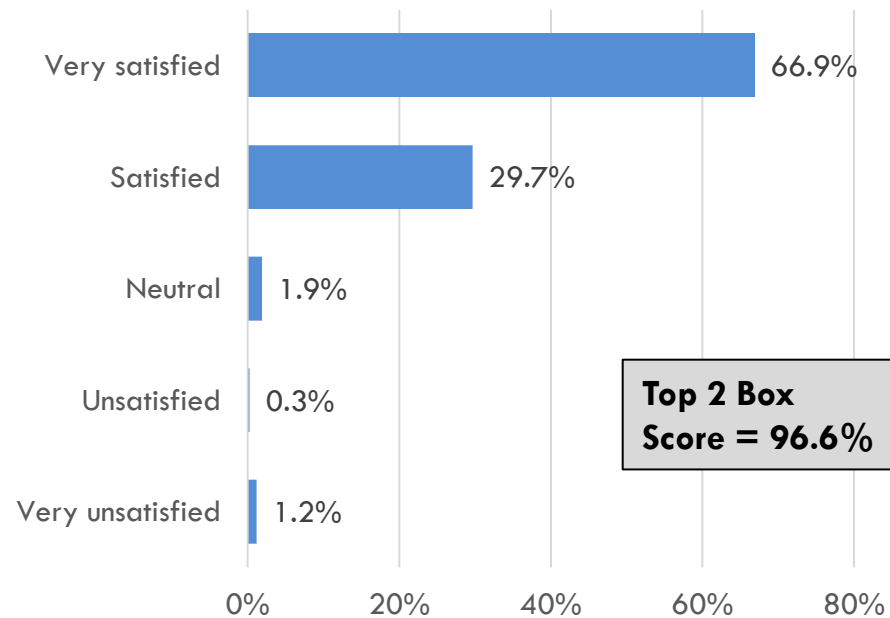
Detail by Season

	Spring	Summer	Fall	Winter
Yes	5.1%	4.6%	4.4%	2.6%
No	92.4%	93.8%	93.3%	95.7%
I prefer not to answer	2.5%	1.5%	2.3%	1.7%
Base	275	1,169	689	117

# SATISFACTION WITH VISITOR EXPERIENCE

**Central Oregon delivers a highly satisfactory visitor experience.** Visitors universally felt satisfied with their Central Oregon experience (96.6%). In total, 29.7 percent reported being “satisfied” and a much higher 66.9 percent were “very satisfied.”

**Figure 20: Satisfaction with Visitor Experience**



Question: How satisfied are you with your visitor experience in Central Oregon?  
 Base: All recent visitors. 2,250 completed surveys.

**Detail by Season**

	Spring	Summer	Fall	Winter
<b>Top 2 Box Score</b>	96.7%	96.8%	96.7%	94.0%
<b>Very satisfied</b>	60.4%	68.9%	65.7%	70.1%
<b>Satisfied</b>	36.4%	28.0%	30.9%	23.9%
<b>Neutral</b>	1.8%	1.9%	2.0%	1.7%
<b>Unsatisfied</b>	0.0%	0.3%	0.3%	0.9%
<b>Very unsatisfied</b>	1.5%	1.0%	1.0%	3.4%
<b>Base</b>	275	1,169	689	117



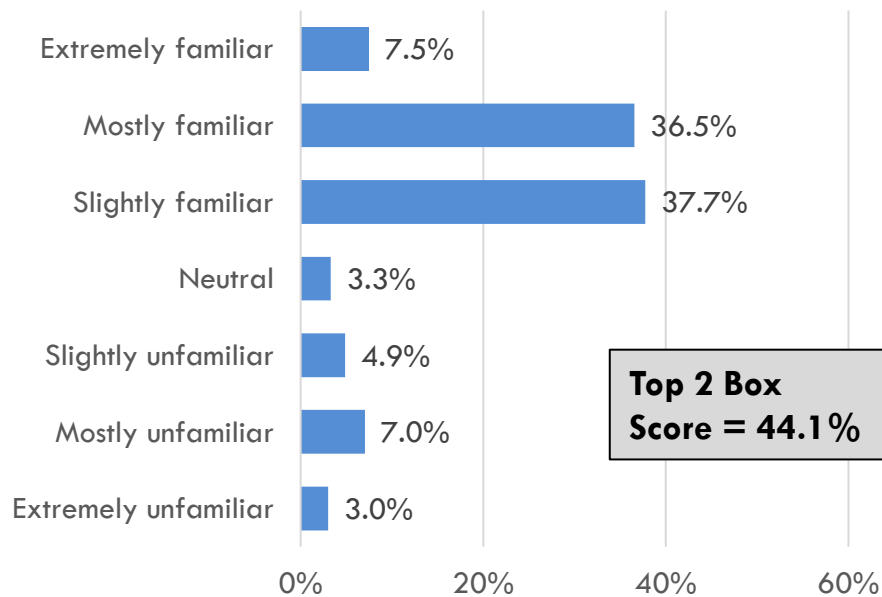
# **THE CENTRAL OREGON DESTINATION BRAND**

**This section details Recent Visitors & Non-Visitors' perceptions of the Central Oregon Destination Brand.**

# FAMILIARITY WITH CENTRAL OREGON

The majority of leisure travelers surveyed have at least some familiarity with the attractions and things to do in Central Oregon (81.7%); more than half of those (44.1%) feel they are mostly or extremely familiar with the region. As expected, recent visitors far exceed non-recent visitors on knowledge of the area (54.2% vs. 17.2%, top 2 box). Winter visitors, who often focus on skiing/snowboarding activities and attractions, reported the relatively highest level of familiarity (62.4%).

Figure 21: Familiarity with Central Oregon



Question: How familiar are you with the attractions and things to do in Central Oregon? (Select one) Base: All potential visitors. 3,100 completed surveys.

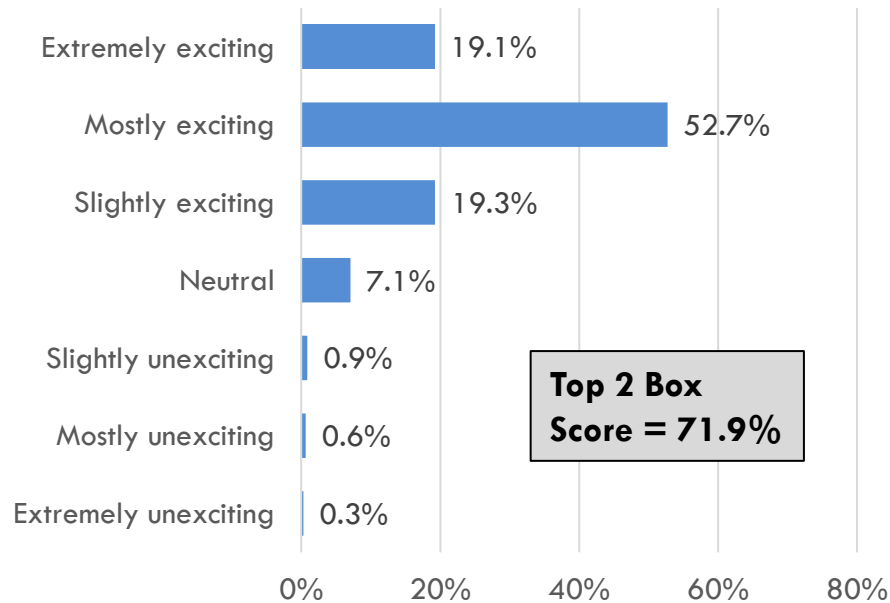
Detail by Season and Visitation

	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
<b>Top 2 Box Score</b>	54.2%	17.2%	46.5%	54.4%	55.6%	62.4%
<b>Extremely familiar</b>	9.5%	2.2%	9.1%	8.9%	9.7%	15.4%
<b>Mostly familiar</b>	44.7%	14.9%	37.5%	45.5%	45.9%	47.0%
<b>Slightly familiar</b>	35.4%	44.0%	40.4%	35.1%	34.8%	29.9%
<b>Neutral</b>	2.7%	4.9%	2.9%	2.7%	2.8%	1.7%
<b>Slightly unfamiliar</b>	3.7%	8.0%	4.7%	3.8%	3.0%	3.4%
<b>Mostly unfamiliar</b>	3.6%	16.1%	5.1%	3.8%	2.9%	2.6%
<b>Extremely unfamiliar</b>	0.4%	9.8%	0.4%	0.3%	0.9%	0.0%
<b>Base</b>	2,250	850	275	1,169	689	117

# EXCITEMENT ABOUT CENTRAL OREGON

Three quarters (76.6%) of recent visitors generally find Central Oregon mostly or extremely exciting – substantially more than non-recent visitors (59.3%). Although seasonal variations tend to be small, a larger proportion of Winter visitors view the region as exciting, likely attributable to the positive influence of snow sports.

Figure 22: Excitement about Central Oregon



Question: Given what you currently know, how exciting do you generally find the attractions and things to see and do in Central Oregon? (Select one)  
 Base: All potential visitors. 3,100 completed surveys.

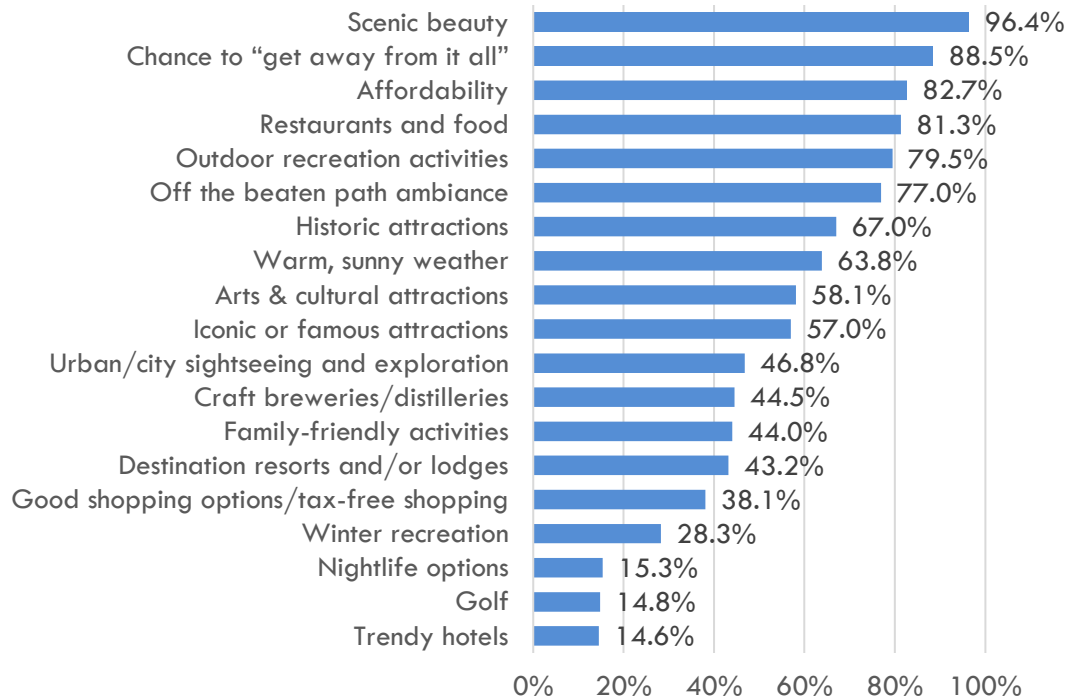
Detail by Season and Visitation

	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
<b>Top 2 Box Score</b>	76.6%	59.3%	74.5%	77.5%	75.3%	80.3%
<b>Extremely exciting</b>	21.2%	13.6%	17.8%	22.5%	20.2%	22.2%
<b>Mostly exciting</b>	55.4%	45.6%	56.7%	55.0%	55.2%	58.1%
<b>Slightly exciting</b>	17.4%	24.2%	18.5%	16.8%	18.6%	13.7%
<b>Neutral</b>	4.5%	13.9%	5.1%	3.9%	5.1%	5.1%
<b>Slightly unexciting</b>	0.8%	1.1%	1.1%	1.0%	0.4%	0.0%
<b>Mostly unexciting</b>	0.5%	1.1%	0.4%	0.5%	0.4%	0.9%
<b>Extremely unexciting</b>	0.2%	0.5%	0.4%	0.3%	0.1%	0.0%
<b>Base</b>	2,250	850	275	1,169	689	117

# ATTRIBUTES IMPORTANT TO DESTINATION SELECTION

Many attributes contribute to travelers' decision-making process in choosing leisure destinations in the Pacific Northwest. Scenic beauty tops the list. Three-quarters or more also cite at least one of these five features: "Get away from it all (88.5%)," affordability (82.7%), restaurants and food (81.3%), outdoor recreation (79.5%) and off-the-beaten-path ambiance (77.0%). Not surprisingly, a larger proportion of Winter visitors note the importance of winter recreation (59.0%). Nightlife, golf, and trendy hotels are relatively less important in selecting leisure travel destinations in the Pacific Northwest.

**Figure 23: Attributes Important to Destination Selection**  
(Top-Two Box Score--% Rating Each as "Important" or "Very important")



Question: Think carefully about how you usually approach selecting the places you visit for leisure in the Pacific Northwest region. In general, how important are each of the following to how you select the places you visit? Base: All respondents. 3,545 completed surveys.

## Detail by Season and Visitation

(Top-Two Box Score--% Rating Each as "Important" or "Very important")

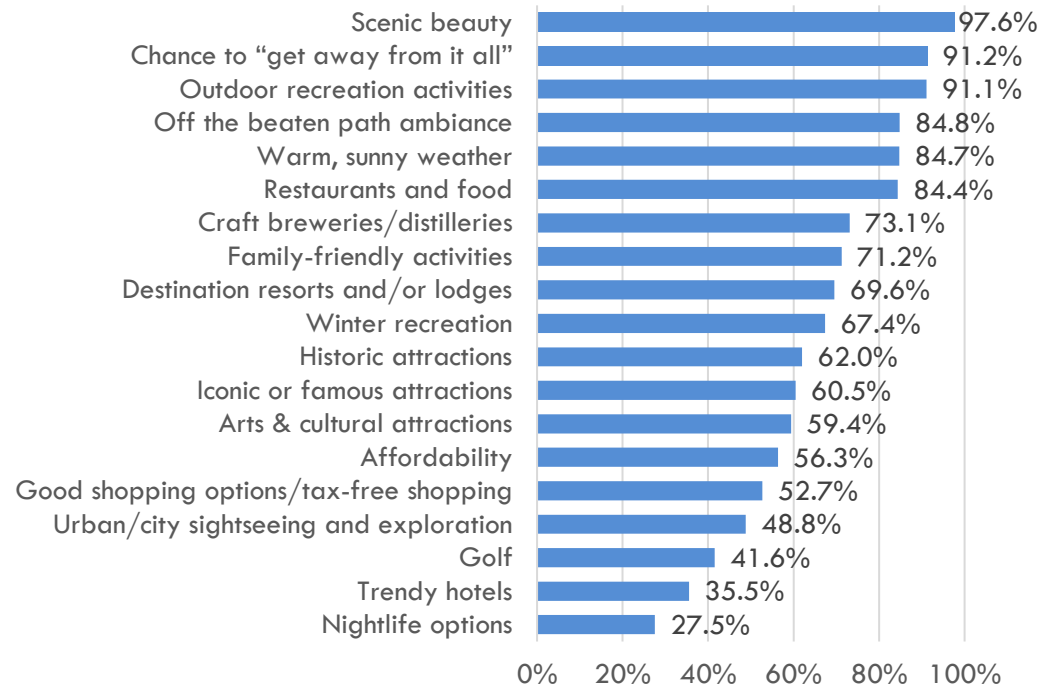
	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
Scenic beauty	96.5%	96.8%	97.1%	95.8%	97.0%	99.1%
Chance to "get away from it all"	88.6%	87.5%	88.0%	88.7%	88.0%	93.2%
Affordability	82.0%	85.2%	83.6%	81.9%	81.1%	84.6%
Restaurants and food	81.2%	81.9%	82.5%	81.1%	80.3%	85.5%
Outdoor recreation activities	81.2%	71.1%	77.8%	82.2%	80.0%	85.5%
Off the beaten path ambiance	75.8%	77.1%	74.2%	75.4%	76.5%	80.3%
Historic attractions	64.7%	74.2%	66.9%	65.0%	66.2%	47.0%
Warm, sunny weather	66.2%	56.5%	59.6%	69.7%	63.9%	59.8%
Arts & cultural attractions	55.9%	63.5%	61.5%	54.7%	57.0%	47.9%
Iconic or famous attractions	54.7%	66.1%	56.0%	54.2%	56.5%	46.2%
Urban/city sightseeing and exploration	44.7%	53.6%	44.7%	44.9%	44.0%	47.0%
Craft breweries/distilleries	47.4%	37.8%	44.7%	48.4%	45.7%	53.8%
Family-friendly activities	45.4%	39.1%	40.4%	50.1%	39.0%	47.9%
Destination resorts and/or lodges	44.9%	43.2%	45.8%	44.7%	44.8%	44.4%
Good shopping options/tax-free shopping	37.4%	39.8%	38.2%	38.2%	37.2%	29.1%
Winter recreation	29.5%	16.9%	27.3%	28.1%	27.6%	59.0%
Nightlife options	14.4%	14.5%	17.5%	12.8%	15.2%	18.8%
Golf	16.5%	10.8%	12.7%	17.5%	16.8%	13.7%
Trendy hotels	14.2%	14.4%	16.7%	13.9%	12.8%	19.7%
Base	2,250	850	275	1,169	689	117



# EVALUATION OF CENTRAL OREGON'S DESTINATION ATTRIBUTES

In addition to scenic beauty, the chance to “get away from it all,” and outdoor recreation, Central Oregon is highly rated for off the beaten path ambiance, warm weather and restaurants. Recent visitors rate each attribute of Central Oregon higher than non-recent visitors, with a larger gap for golf than other features. Meanwhile, winter visitors rate the destination’s winter recreation more highly (85.5%).

**Figure 24: Evaluation of Central Oregon’s Destination Attributes**  
(Top-Two Box Score--% Rating Each as “Good” or “Very good”)



Question: Please use the scale below where "1" equals "Very poor" and "5" equals "Very good" to evaluate each attribute of Central Oregon as a place to visit for leisure travel.  
Base: All respondents. 3,545 completed surveys.

## Detail by Season and Visitation

(Top-Two Box Score--% Rating Each as “Good” or “Very good”)

	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
Scenic beauty	98.8%	94.4%	99.3%	98.5%	98.8%	100.0%
Chance to “get away from it all”	93.1%	88.9%	92.4%	93.9%	91.7%	94.0%
Outdoor recreation activities	92.3%	85.3%	89.5%	92.6%	93.0%	91.5%
Off the beaten path ambiance	86.7%	83.2%	86.9%	86.1%	87.8%	86.3%
Warm, sunny weather	88.6%	72.1%	82.2%	90.7%	87.7%	88.0%
Restaurants and food	86.6%	77.3%	86.9%	86.4%	86.6%	87.2%
Craft breweries/distilleries	74.6%	61.4%	68.4%	76.5%	73.1%	79.5%
Family-friendly activities	72.5%	63.9%	66.2%	76.0%	68.8%	74.4%
Destination resorts and/or lodges	70.6%	64.1%	67.6%	71.1%	70.4%	74.4%
Winter recreation	67.0%	56.8%	61.5%	65.4%	68.8%	85.5%
Historic attractions	63.9%	62.4%	64.0%	64.1%	65.3%	53.8%
Iconic or famous attractions	62.2%	60.2%	60.7%	62.3%	64.0%	53.8%
Arts & cultural attractions	61.6%	55.8%	62.5%	61.6%	62.8%	53.0%
Affordability	59.3%	55.6%	58.9%	61.6%	55.7%	58.1%
Good shopping options/tax-free shopping	53.3%	46.1%	50.5%	53.5%	54.7%	50.4%
Urban/city sightseeing and exploration	49.5%	48.4%	51.6%	51.0%	46.7%	46.2%
Golf	42.0%	29.8%	36.4%	42.4%	43.3%	43.6%
Trendy hotels	35.3%	31.6%	37.5%	34.9%	34.7%	38.5%
Nightlife options	26.8%	23.5%	29.5%	26.7%	25.0%	33.3%
Base	2,250	850	275	1,169	689	117

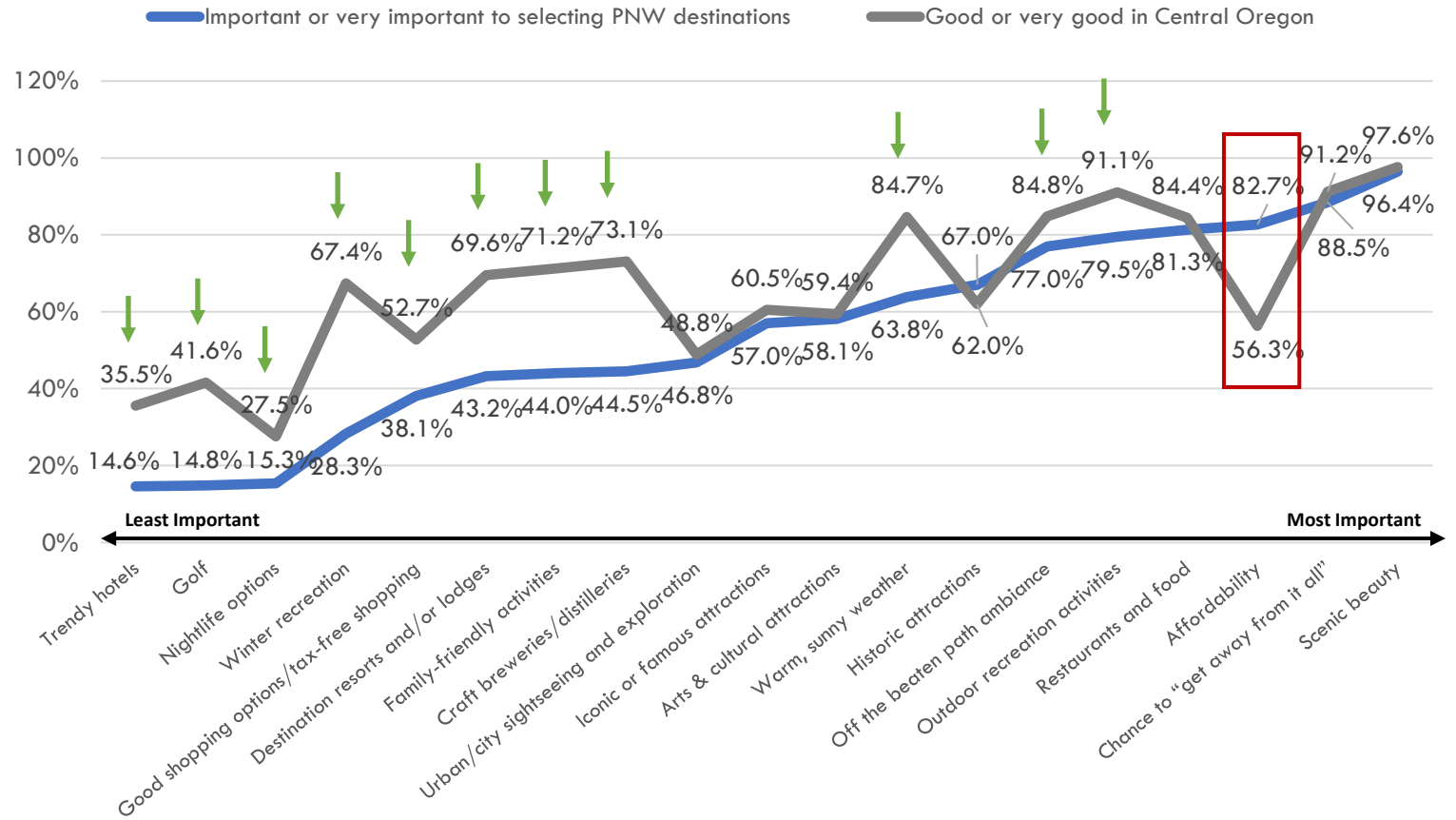
# ATTRIBUTES IMPORTANT TO DESTINATION SELECTION VS. CENTRAL OREGON'S RATINGS

Central Oregon performs well for nearly all attributes tested, particularly for outdoor recreation, off the beaten path ambiance and sunny weather, which are among the top 10 most important attributes travelers consider when evaluating leisure destinations in the Pacific Northwest to visit. However, the region underperforms on affordability in the minds of these leisure travelers.

The chart at right maps the percent of leisure travelers who rated each attribute “important” or “very important” in selecting leisure destinations (blue line) against the percent who rated each attribute as “good” or “very good” in Central Oregon (gray line). Green arrows designate Central Oregon’s overperformance and the red box underperformance. For all other attributes, Central Oregon is rated similarly to that attribute’s level of importance in selecting Pacific Northwest destinations.

Question: 1. In general, how important are each of the following to how you select the places you visit? . 2. Please use the scale below where "1" equals "Very poor" and "5" equals "Very good" to evaluate each attribute of Central Oregon as a place to visit for leisure travel. Base: All respondents. 3,545 completed surveys.

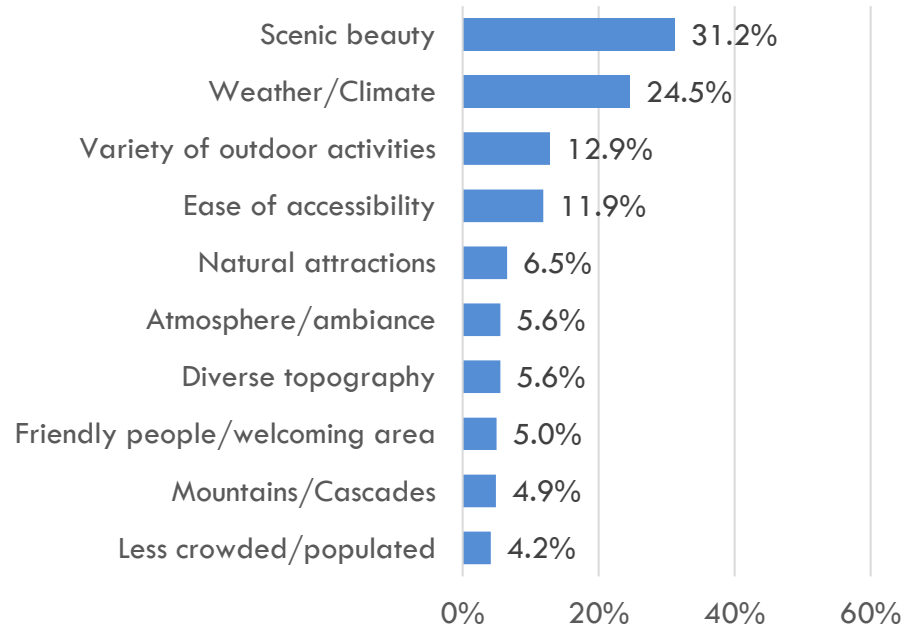
Figure 25: Attributes Important to Destination Selection vs. Central Oregon's Ratings



# CENTRAL OREGON'S DISTINGUISHING ASPECTS

When asked what sets Central Oregon apart from other destinations in the Pacific Northwest region, nearly a third wrote in “scenic beauty” (31.2%). Additionally, one-quarter wrote in “weather/climate” (24.5%), while over one-in-ten wrote said “variety of outdoor activities” (12.9%) and “ease of accessibility” (11.9%).

**Figure 26: Central Oregon’s Distinguishing Aspects**



Question: In a few words, what makes Central Oregon DIFFERENT FROM OTHER DESTINATIONS in the Pacific Northwest region of the U.S.?  
 Base: All respondents. 3,032 completed surveys.

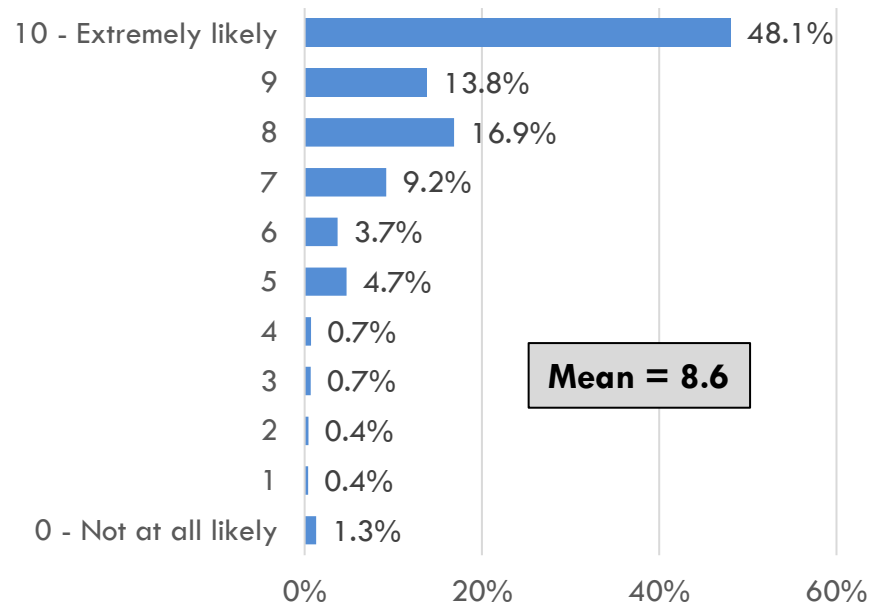
**Detail by Season and Visitation**

	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
Scenic beauty	32.5%	32.2%	39.8%	32.3%	31.1%	25.5%
Weather/Climate	25.8%	17.0%	19.5%	26.2%	26.8%	31.4%
Variety of outdoor activities	12.9%	9.1%	12.6%	12.9%	12.4%	16.7%
Ease of accessibility	12.2%	10.7%	11.4%	12.7%	12.2%	9.8%
Natural attractions	6.3%	8.0%	6.5%	6.7%	5.7%	5.9%
Atmosphere/ambiance	5.9%	5.4%	6.1%	6.4%	4.7%	7.8%
Diverse topography	5.7%	5.7%	6.5%	4.7%	7.3%	4.9%
Friendly people/welcoming area	4.8%	3.3%	6.9%	4.2%	4.7%	5.9%
Mountains/Cascades	4.9%	5.4%	4.9%	5.5%	4.1%	2.9%
Less crowded/populated	3.5%	6.3%	2.4%	3.6%	3.7%	3.9%
Base	1,993	646	246	1030	615	102

# LIKELIHOOD TO RECOMMEND CENTRAL OREGON

Survey respondents are highly likely to recommend Central Oregon as a destination to visit. Nearly half (48.1%) gave the highest possible rating (10 on a 0-10 point scale). The average likelihood of 8.6 is exceeded by recent visitors (8.9).

Figure 27: Likelihood to Recommend Central Oregon



Question: How likely are you to recommend Central Oregon as a place to visit for leisure? Please use the eleven-point scale below, where 0 means “Not at all likely” and 10 equals “Extremely likely.” Base: All respondents. 3,545 completed surveys.

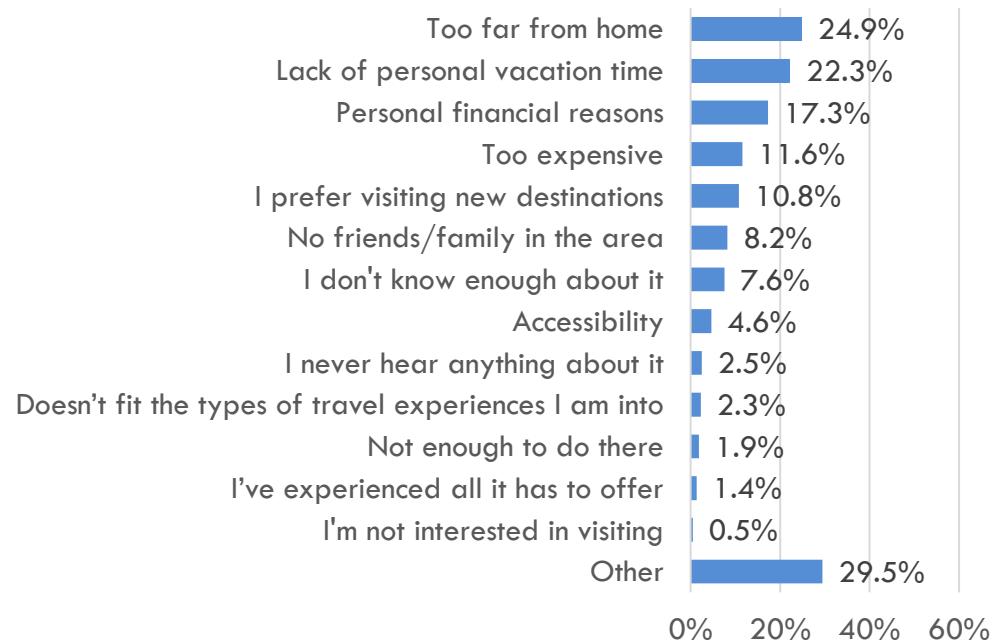
Detail by Season and Visitation

	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
10 - Extremely likely	54.8%	27.1%	48.7%	57.2%	52.7%	56.4%
9	14.4%	13.9%	13.1%	14.9%	14.8%	11.1%
8	16.5%	19.5%	20.0%	15.5%	17.0%	16.2%
7	7.6%	14.1%	9.5%	6.7%	8.9%	5.1%
6	3.0%	6.6%	4.4%	2.4%	3.3%	3.4%
5	2.0%	12.4%	2.2%	1.6%	2.3%	2.6%
4	0.4%	1.8%	0.7%	0.3%	0.4%	0.9%
3	0.4%	1.3%	0.4%	0.5%	0.1%	0.0%
2	0.2%	0.7%	0.0%	0.3%	0.1%	0.9%
1	0.3%	0.4%	0.4%	0.3%	0.0%	1.7%
0 - Not at all likely	0.5%	2.4%	0.7%	0.4%	0.3%	1.7%
Mean	8.9	7.6	8.7	9.0	8.9	8.7
Base	2,250	850	275	1,169	689	117

# DETERRENTS TO VISITING CENTRAL OREGON

The most common reasons that keep travelers from visiting Central Oregon are distance from home (24.9%) and lack of personal vacation time (22.3%), each cited by one-in-five leisure travelers. The next two deterrents are personal financial reasons (17.3%) and the perception that the area is too expensive (11.6%). Non-recent visitors are likelier to report that they don't know enough about Central Oregon (18.7% vs. 3.4% for recent visitors), highlighting an opportunity to educate these potential visitors about Central Oregon's assets.

Figure 28: Deterrents to Visiting Central Oregon



Question: In general, what keeps you from visiting Central Oregon? (Select all that apply)  
 Base: All potential visitors. 3,100 completed surveys.

Detail by Season and Visitation

	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
Too far from home	24.4%	26.1%	25.8%	24.6%	23.5%	24.8%
Lack of personal vacation time	23.1%	20.1%	21.1%	24.0%	21.6%	26.5%
Personal financial reasons	14.6%	24.5%	17.5%	14.5%	14.5%	8.5%
Too expensive	12.2%	10.1%	13.5%	11.6%	11.9%	16.2%
I prefer visiting new destinations	12.3%	6.7%	12.7%	11.4%	13.5%	13.7%
No friends/family in the area	5.2%	16.2%	4.7%	5.7%	4.4%	5.1%
I don't know enough about it	3.4%	18.7%	2.9%	3.0%	3.9%	6.0%
Accessibility	3.0%	8.9%	2.9%	2.5%	4.1%	2.6%
I never hear anything about it	1.1%	6.2%	0.7%	1.4%	0.7%	1.7%
Doesn't fit the types of travel experiences I am into	1.3%	4.9%	1.5%	1.0%	1.3%	3.4%
Not enough to do there	1.6%	2.5%	1.8%	1.5%	1.9%	1.7%
I've experienced all it has to offer	1.3%	1.5%	0.7%	1.3%	1.5%	2.6%
I'm not interested in visiting	0.3%	1.1%	0.4%	0.4%	0.0%	0.0%
Other	27.2%	35.4%	33.1%	25.8%	27.7%	23.9%
Base	2,250	850	275	1,169	689	117



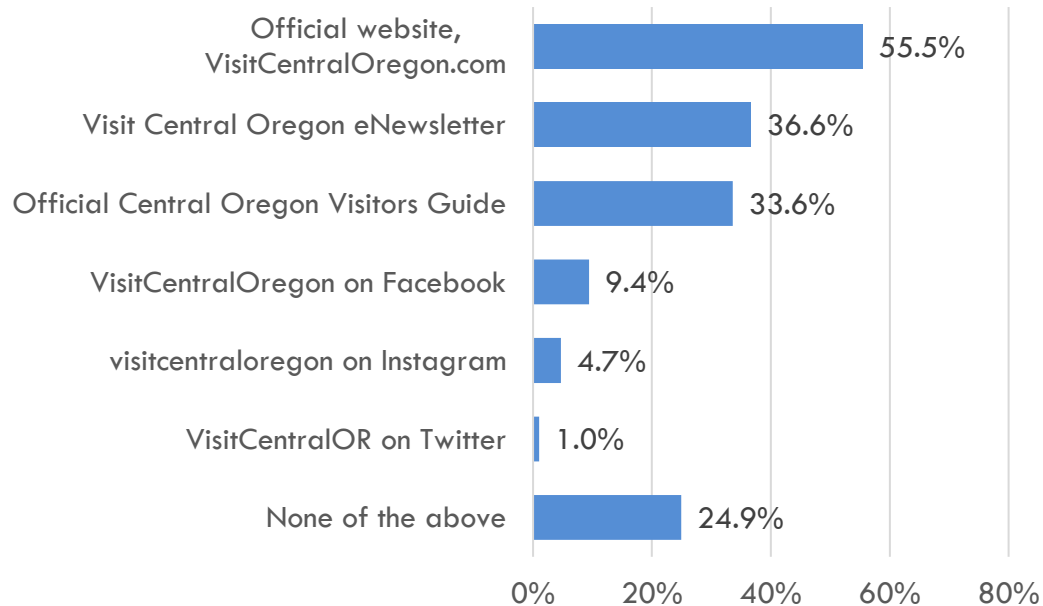
# RESPONDENT PROFILE

**This section details the profile of all survey respondents.**

# VISIT CENTRAL OREGON RESOURCES USED

Three quarters (75.1%) of travelers surveyed have used at least one Visit Central Oregon resource in the past year, primarily the website (55.5%). A third has also read the eNewsletter (36.6%) and/or Visitors' Guide (33.6%). Fewer than one in ten has accessed @VisitCentralOregon on Facebook, @visitcentraloregon on Instagram or @VisitCentralOR on Twitter.

**Figure 29: Visit Central Oregon Resources Used**



Question: Which of the following Visit Central Oregon resources, if any, have you used in the past 12 months? (Select all that apply)  
 Base: All respondents. 3,545 completed surveys.

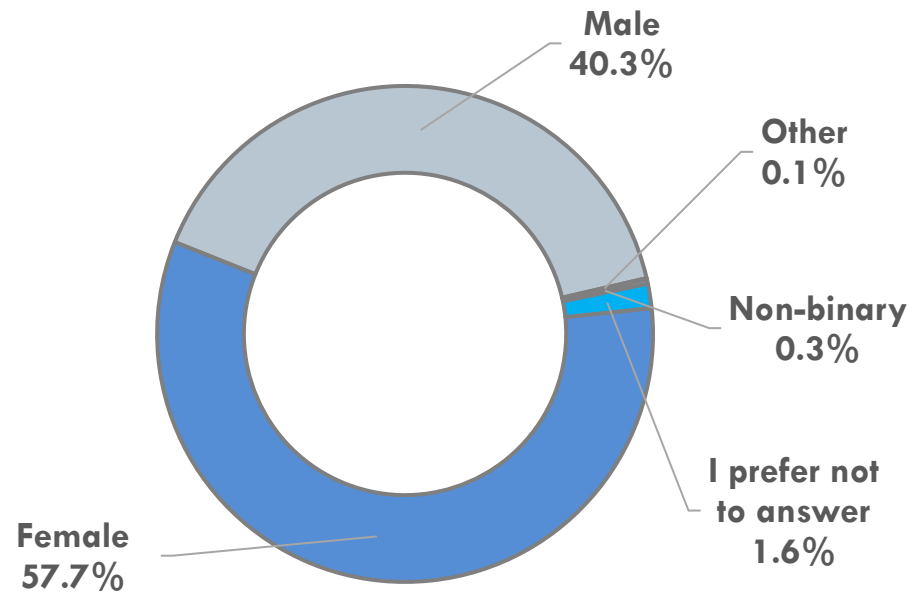
**Detail by Season and Visitation**

	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
Official website, VisitCentralOregon.com	57.6%	50.1%	56.0%	59.4%	57.0%	47.0%
Visit Central Oregon eNewsletter	35.7%	40.9%	32.4%	37.0%	35.3%	32.5%
Official Central Oregon Visitors Guide	33.8%	33.4%	32.7%	33.3%	36.4%	26.5%
@VisitCentralOregon on Facebook	8.2%	7.5%	9.8%	7.9%	8.1%	8.5%
@visitcentraloregon on Instagram	4.8%	2.2%	6.5%	4.9%	4.6%	1.7%
@VisitCentralOR on Twitter	0.8%	0.8%	0.4%	0.8%	0.9%	0.9%
None of the above	24.3%	26.1%	23.3%	23.5%	24.4%	33.3%
Base	2,250	850	275	1,169	689	117

# GENDER

The survey sample skewed somewhat female (57.7%).

Figure 30: Gender



Question: Which best describes you? (Select one)  
 Base: All respondents. 3,550 completed surveys.

Detail by Season and Visitation

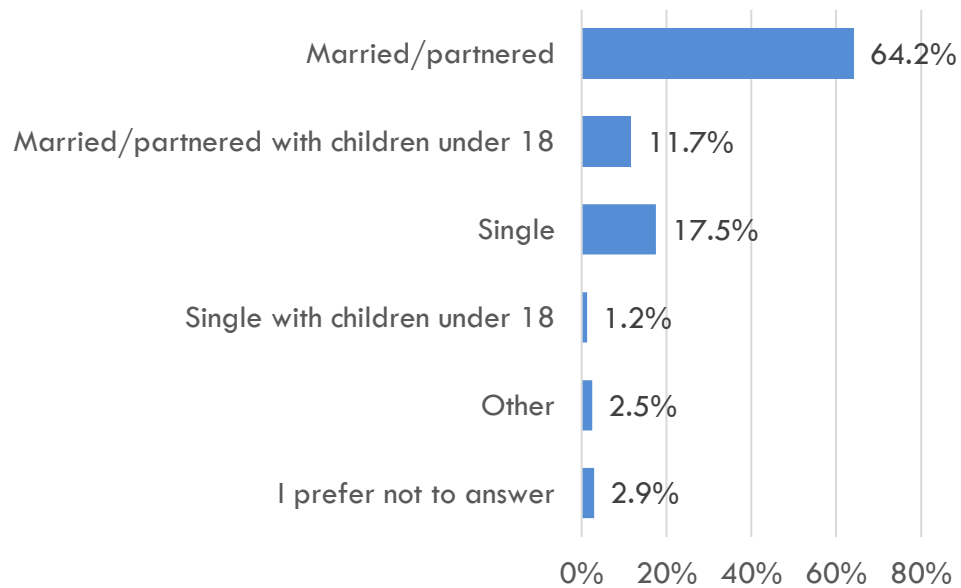
	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
Female	56.5%	55.4%	54.2%	57.8%	55.7%	53.0%
Male	41.7%	43.1%	43.6%	40.7%	42.2%	43.6%
Other	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%
Non-binary	0.2%	0.5%	0.4%	0.2%	0.1%	0.0%
I prefer not to answer	1.6%	0.9%	1.8%	1.3%	1.7%	3.4%
Base	2,250	850	275	1,169	689	117



# MARITAL STATUS

Three quarters of survey respondents are married or partnered (75.9%), while about one-in-five is single (18.7%). In total, 12.9 percent has children under 18.

Figure 31: Marital Status



Question: Which best describes your current marital status? (Select one)  
 Base: All respondents. 3,550 completed surveys.

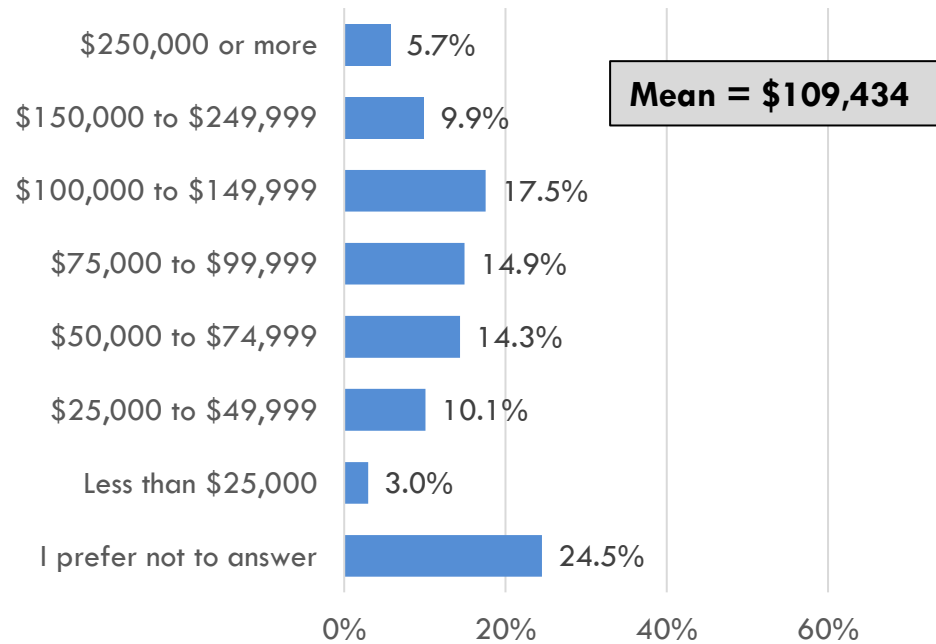
Detail by Season and Visitation

	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
<b>Married/partnered</b>	66.7%	60.4%	66.5%	64.8%	70.2%	65.0%
<b>Married/partnered with children under 18</b>	11.7%	9.1%	10.5%	14.5%	7.4%	12.8%
<b>Single</b>	15.6%	24.0%	15.3%	15.5%	16.3%	12.8%
<b>Single with children under 18</b>	1.2%	0.8%	0.7%	1.2%	1.3%	2.6%
<b>Other</b>	2.3%	2.5%	2.5%	2.2%	2.0%	3.4%
<b>I prefer not to answer</b>	2.5%	3.3%	4.4%	1.9%	2.8%	3.4%
<b>Base</b>	2,250	850	275	1,169	689	117

# COMBINED ANNUAL HOUSEHOLD INCOME

Respondents in the survey sample are affluent, with household incomes averaging \$109,434. Recent Central Oregon visitors report higher incomes (\$116,248) than non-recent visitors (\$92,467).

Figure 32: Combined Annual Household Income



Question: Which best describes the combined annual income of all members of your household? (Select one)  
 Base: All respondents. 3,550 completed surveys.

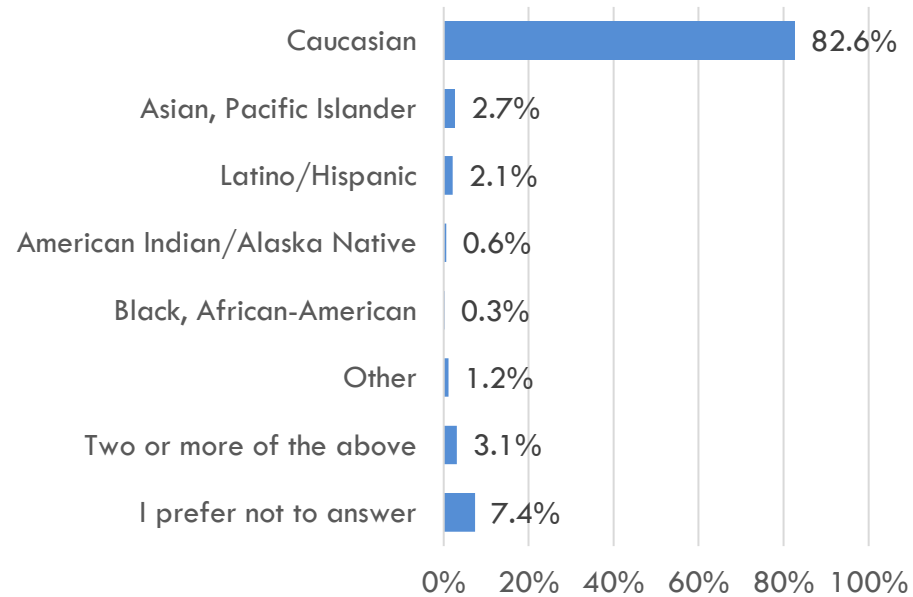
Detail by Season and Visitation

	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
\$250,000 or more	6.6%	3.6%	2.9%	6.9%	7.4%	7.7%
\$150,000 to \$249,999	11.9%	5.4%	11.6%	11.1%	12.9%	14.5%
\$100,000 to \$149,999	18.7%	14.9%	14.5%	20.8%	16.4%	20.5%
\$75,000 to \$99,999	15.7%	13.5%	18.2%	16.2%	14.1%	15.4%
\$50,000 to \$74,999	13.2%	16.1%	15.3%	12.7%	13.6%	11.1%
\$25,000 to \$49,999	8.9%	12.9%	9.1%	7.8%	10.4%	10.3%
Less than \$25,000	2.0%	5.6%	2.5%	2.1%	1.7%	1.7%
I prefer not to answer	22.9%	27.8%	25.8%	22.4%	23.4%	18.8%
Mean	\$116,248	\$92,467	\$105,453	\$117,406	\$117,495	\$121,447
Base	1,734	614	204	907	528	95

# ETHNICITY

The majority of respondents identify as **Caucasian (82.6%)**. One-in-ten identified as a non-Caucasian ethnicity, with Spring visitors having the largest proportion of non-Caucasian travelers (12.4%).

**Figure 33: Ethnicity**



Question: Which best described your ethnicity? (Select one)  
 Base: All respondents. 3,550 completed surveys.

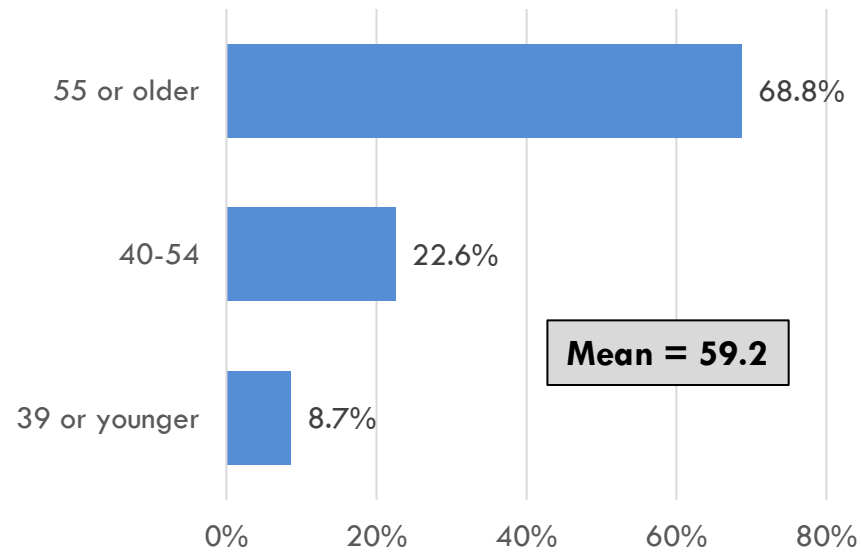
**Detail by Season and Visitation**

	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
<b>Caucasian</b>	82.4%	82.1%	79.3%	81.7%	83.7%	88.9%
<b>Asian, Pacific Islander</b>	2.6%	4.0%	3.6%	2.8%	2.2%	0.9%
<b>Latino/Hispanic</b>	2.0%	2.8%	1.8%	2.4%	1.6%	1.7%
<b>American Indian/Alaska Native</b>	0.7%	0.5%	0.4%	0.7%	1.0%	0.0%
<b>Black, African-American</b>	0.3%	0.4%	0.4%	0.4%	0.0%	0.0%
<b>Other</b>	1.2%	1.4%	1.8%	0.9%	1.5%	0.0%
<b>Two or more of the above</b>	3.6%	2.5%	4.4%	3.7%	3.6%	1.7%
<b>I prefer not to answer</b>	7.2%	6.4%	8.4%	7.4%	6.4%	6.8%
<b>Base</b>	2,250	850	275	1,169	689	117

# AGE

The average age of travelers surveyed is 59.2 years old, with over two thirds who are 55 or older (68.8%). Winter visitors skew slightly younger, with an average age of 57.2.

Figure 34: Age



Question: In which year were you born?  
Base: All respondents. 3,550 completed surveys.

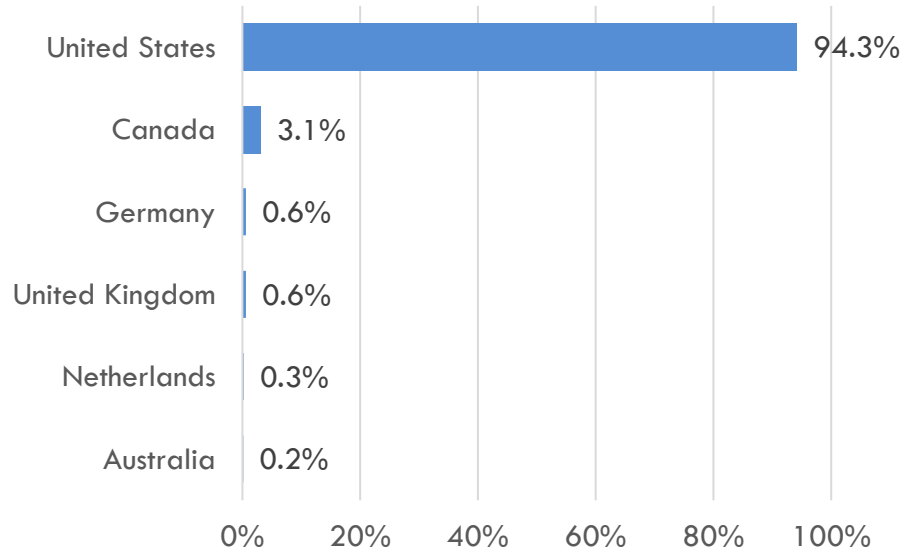
Detail by Season and Visitation

	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
55 or older	68.4%	73.8%	71.3%	65.4%	73.9%	59.0%
40-54	23.4%	20.0%	20.7%	25.6%	19.3%	31.6%
39 or younger	8.2%	6.2%	8.0%	9.0%	6.8%	9.4%
Mean	59.3	60.6	60.0	58.6	60.5	57.2
Base	2,250	850	275	1,169	689	117

# COUNTRY OF RESIDENCE

The overwhelming majority of survey travelers reside in the United States (94.3%).

Figure 35: Country of Residence



Question: In which country do you live?  
 Base: All respondents. 3,550 completed surveys.

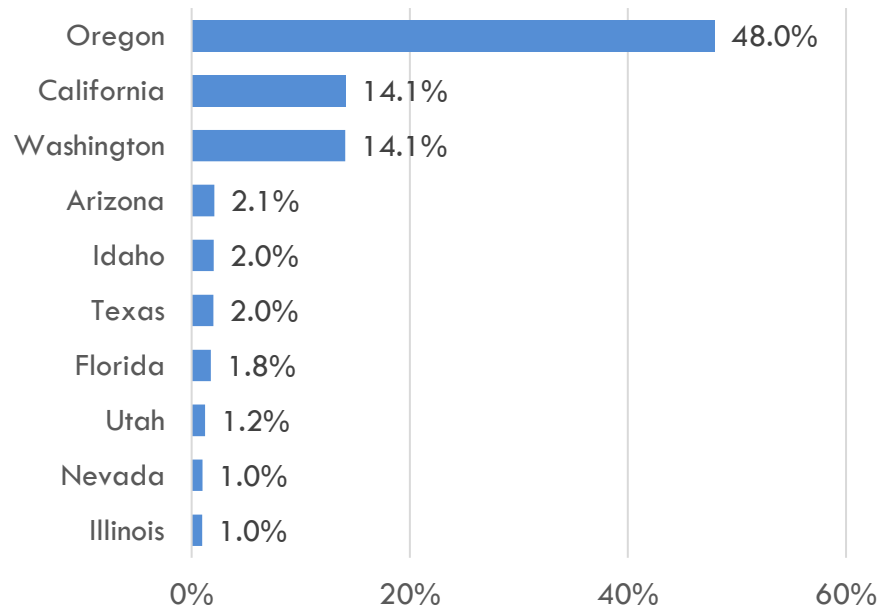
Detail by Season and Visitation

	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
United States	95.6%	87.6%	91.6%	95.2%	97.1%	100.0%
Canada	2.4%	6.6%	5.5%	2.8%	0.9%	0.0%
Germany	0.5%	1.2%	0.4%	0.5%	0.7%	0.0%
United Kingdom	0.5%	1.2%	0.7%	0.6%	0.4%	0.0%
Netherlands	0.3%	0.2%	0.4%	0.3%	0.3%	0.0%
Australia	0.0%	0.6%	0.0%	0.1%	0.0%	0.0%
Base	2,250	850	275	1,169	689	117

# STATE OF RESIDENCE

Half of U.S. respondents live in Oregon (48.0%). Out-of-state representation was highest among nearby California and Washington (14.1% each). Relatively few non-recent visitors reside in Oregon (18.1%), with more living in California (20.7%) than elsewhere.

Figure 36: State of Residence



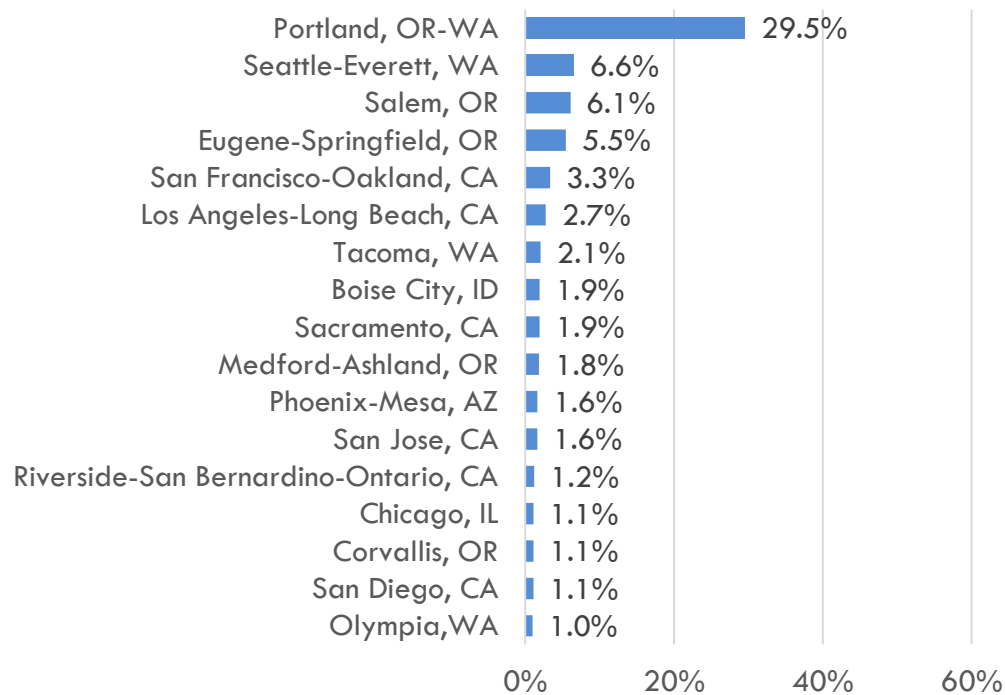
Question: In which state do you reside?  
 Base: All U.S. residents. 3,346 completed surveys.

Detail by Season and Visitation

	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
Oregon	47.7%	18.1%	45.6%	45.8%	50.7%	52.1%
California	14.7%	20.7%	17.5%	15.6%	12.4%	13.7%
Washington	17.1%	13.7%	17.5%	17.1%	16.7%	18.8%
Arizona	2.0%	3.6%	0.8%	2.3%	2.1%	0.9%
Idaho	2.5%	1.9%	4.0%	2.7%	1.9%	0.9%
Texas	1.5%	4.6%	1.6%	1.3%	1.8%	0.9%
Florida	1.7%	3.0%	1.2%	2.0%	1.6%	0.9%
Utah	1.2%	2.0%	1.2%	1.5%	0.9%	0.0%
Nevada	0.9%	1.9%	0.0%	1.1%	1.0%	0.0%
Illinois	0.7%	2.3%	0.0%	0.7%	0.7%	1.7%
Base	2,151	745	252	1,113	669	117

Nearly a third (29.5%) of U.S. survey respondents live in the Portland, OR-WA area, substantially leading all other areas listed. Seattle-Everett (6.6%), Salem (6.1%), and Eugene-Springfield (5.5%), form a second-tier of residences.

Figure 37: MSA



Question: What is your zip code?  
 Base: All U.S. residents. 2,437 completed surveys.

Detail by Season and Visitation

	Recent Visitor	Non-Recent Visitor	Spring	Summer	Fall	Winter
Portland, OR-WA	35.2%	11.9%	35.3%	33.1%	37.5%	41.2%
Seattle-Everett, WA	6.8%	6.3%	7.0%	6.3%	7.5%	6.9%
Salem, OR	7.3%	1.6%	5.5%	7.7%	7.1%	6.9%
Eugene-Springfield, OR	6.1%	3.4%	5.0%	5.0%	8.6%	5.9%
San Francisco-Oakland, CA	3.1%	4.2%	3.5%	4.0%	1.6%	1.0%
Los Angeles-Long Beach, CA	2.3%	4.2%	3.5%	1.8%	2.9%	1.0%
Tacoma, WA	2.1%	2.1%	3.5%	2.0%	1.1%	4.9%
Boise City, ID	2.1%	1.5%	4.0%	2.2%	1.5%	1.0%
Sacramento, CA	1.7%	2.8%	2.0%	1.8%	1.5%	1.0%
Medford-Ashland, OR	2.1%	1.1%	3.5%	1.9%	2.0%	1.0%
Phoenix-Mesa, AZ	1.3%	2.6%	0.5%	1.7%	1.1%	1.0%
San Jose, CA	1.6%	1.8%	0.0%	1.9%	1.3%	2.9%
Riverside-San Bernardino-Ontario, CA	0.9%	2.0%	2.0%	1.1%	0.4%	1.0%
Chicago, IL	0.7%	2.3%	0.0%	0.7%	0.7%	2.0%
Corvallis, OR	1.3%	0.7%	0.5%	1.7%	0.9%	1.0%
San Diego, CA	0.8%	2.0%	0.5%	1.0%	0.9%	0.0%
Olympia, WA	1.1%	0.7%	1.5%	1.1%	1.1%	1.0%
Base	1,792	615	201	943	546	102

# CENTRAL OREGON RESIDENCE

**Most (72.3%) Oregon residents surveyed live outside the Central Oregon region.** Of those living within 50 miles of a Central Oregon region, Bend is, by far, the most common area (15.9%).

*Note: Central Oregon residents were only asked to complete the demographic questions, as well as a few brand-related questions within the survey.*

Question: Do you live within 50 miles of any of the following cities or towns in Central Oregon? (Select one) Base: All Oregon residents. 1,606 completed surveys.

**Figure 38: Central Oregon Residence**

