Visit Bend Visitor Survey

Summer 2022 Results

Photo: visitbend.com

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Introduction and Methodology

- Beginning in 2008, RRC has conducted visitor research in both summer and winter seasons to monitor a variety of visitor and trip characteristics. This summers' research further strengthens the long-term insights into Bend visitors, building upon the large database of information available to Visit Bend for tracking and understanding visitor profile trends year after year. The purpose of this study is to document and explore those trends, improve the visitor experience in Bend, and to support new opportunities for targeting tourism to the region

- Historically, the primary tool employed to conduct visitor research was visitor intercept surveys. Beginning in Summer 2021, the market research program transitioned to a suite of digital visitor surveys distributed across multiple online platforms. Furthermore, beginning in the Winter 2019/20 season, a supplementary survey was distributed via email to Visit Bend's newsletter subscribers. Summer 2022 continued the use of both methodologies, allowing for up to two years of direct comparison for general visitors and newsletter respondents.

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Sampling

- Online survey distributed through the **Visit Bend website** (n=330) and a targeted, **geo-fenced social media** campaign by Visit Bend through Facebook and Instagram (n=17). These two samples are combined, for a total **n=347** and is compared against previous summer data collected in 2021.
  - This report's results highlight trends from overnight visitors, day visitors, and seasonal residents of Bend over the last 3 summers of data collection (2022, 2021, and 2017).
- Online survey distributed to the Visit Bend **E-Newsletter database (n=50)** in October. A similar E-Newsletter survey was conducted in Summer 2021 and serves as a historic comparison point for this sample. This is referred to as the *newsletter sample*.
  - Despite limited responses this summer, a section in this report explores the results of unique questions on the newsletter survey, including those regarding the planning of prospective visitors and their vacation priorities. Caution should be used when generalizing results with small samples (n < 30) to the broader population.

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Key Observations and Takeaways

Visitor Type and Origin:

- Overnight visitors remained the largest visitor group (87%), though this summer saw an increased share of Day Visitors (9%, up from 4%) compared to previous summers.
- Perhaps driven by more day visitors, this summer saw larger shares of in-state visitors (35%, up from 24%) and less air travel (16%, down from 23%).
- Visitors were slightly younger and less wealthy this summer compared to 2021, and most traveled with their family (either spouse/partner or broader family/children).
- The share of first-time visitors hit a 3-year high of 52%.

Overnight Guests:

- Rented accommodations (hotel/motel or VRBO) hit a 3-year high of a combined 70%, with most rentals based in Bend (78%). Relatedly, a smaller share were staying with friends/family.
- Nights stayed in the area decreased from 4.2 in 2021 to 3.5 in 2022, on average.

Key Observations and Takeaways

Trip Characteristics/Planning:

- Visitors' purpose in Bend continued to be based around recreation and social reasons, with even more respondents citing outdoor recreation as their main purpose this summer (63%, up from 52%).
- Increasing shares of visitors each season are checking out Downtown Bend, with 89% (up from 78%) doing so this summer. This has resulting in a corresponding increase in visitors to the Downtown Bend Visitor Center (46%, up from 23%).
- While visitors continue to be highly satisfied with their recreation experience (100% of visitors indicating a 4 or 5/5) and nearly three-quarters likely to be Promotors of Bend (72%), average satisfaction ratings for other factors decreased from previous summers.

$ Trip Expenditures:

- After spiking in 2021, average expenditures per person and as a party declined in all categories from summer 2021, with most spending categories receding to slightly above 2017 levels.
- Lodging spending per person remained somewhat higher than 2021 at $213

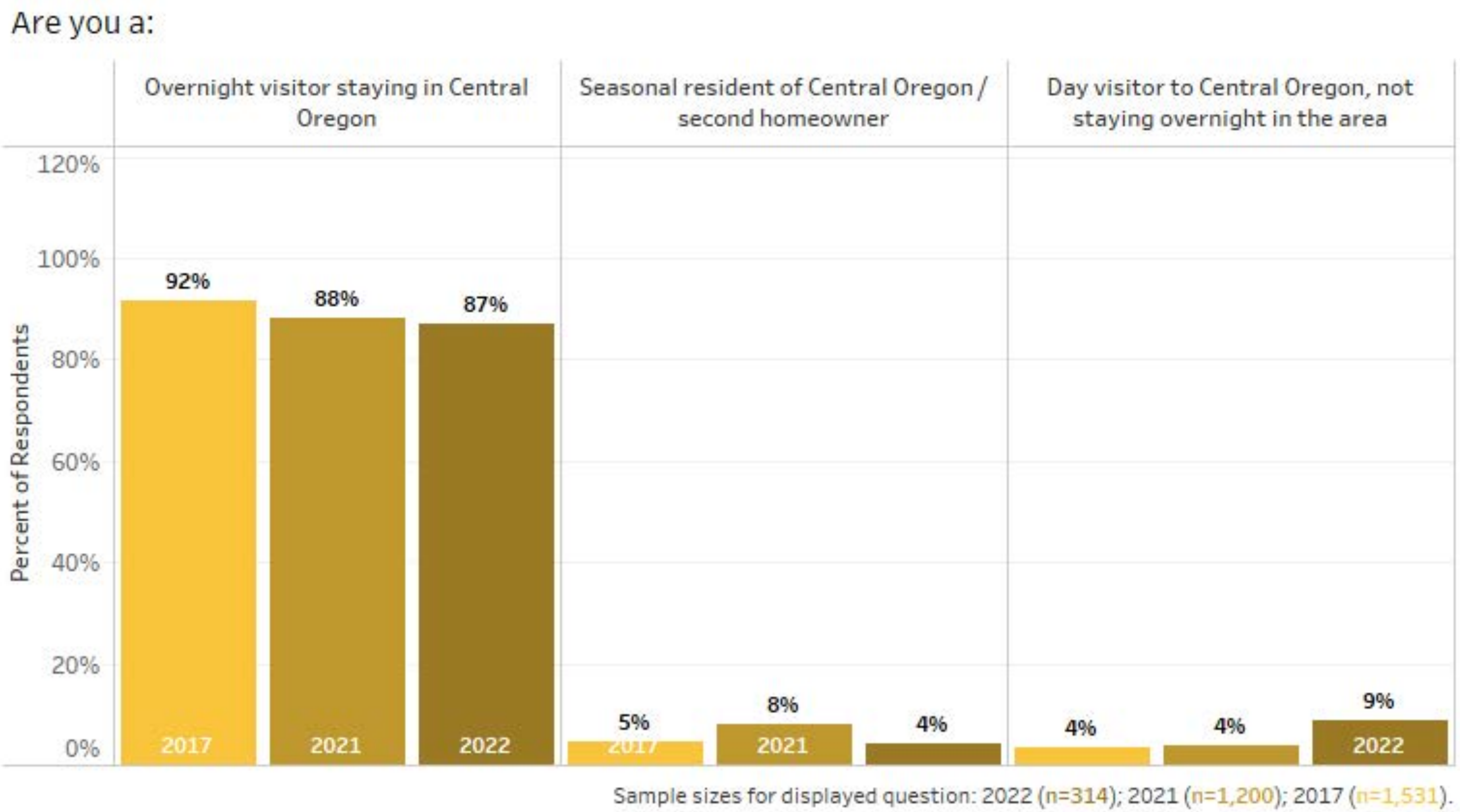
Photo: visitbend.com

Visitor Type and Origin

Photo: visitbend.com

Visitor Segments

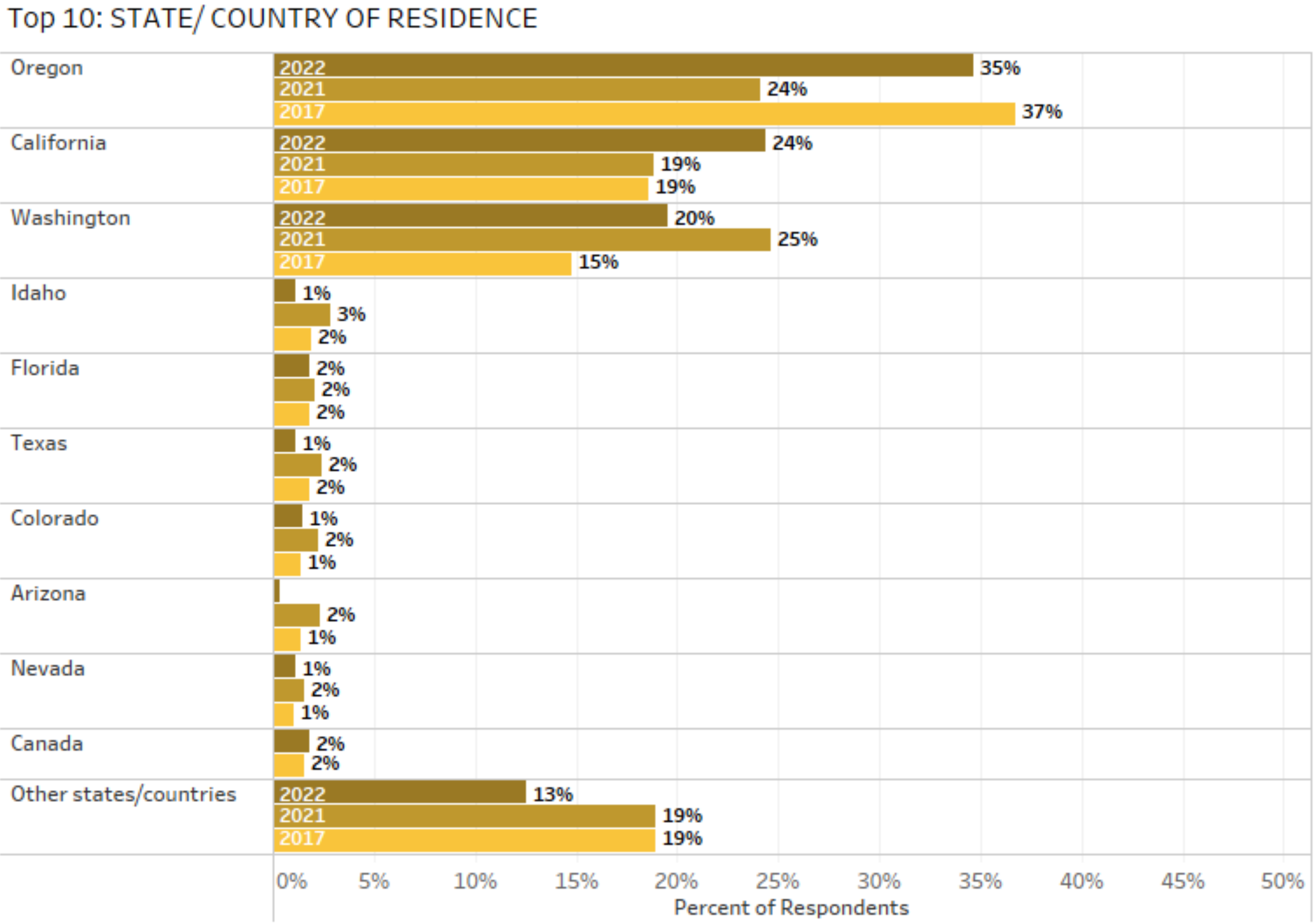
Summer: 3-year comparison



- Overnight visitors staying in Central Oregon continued to represent the largest share of respondents (**87%** in 2022).
- The share of seasonal and day visitors shifted slightly this season, with seasonal residents decreasing to **4%** (-4 ppts) and day visitors increasing to **9%** (+5 ppts).

Visitor Origin

Summer: 3-year comparison



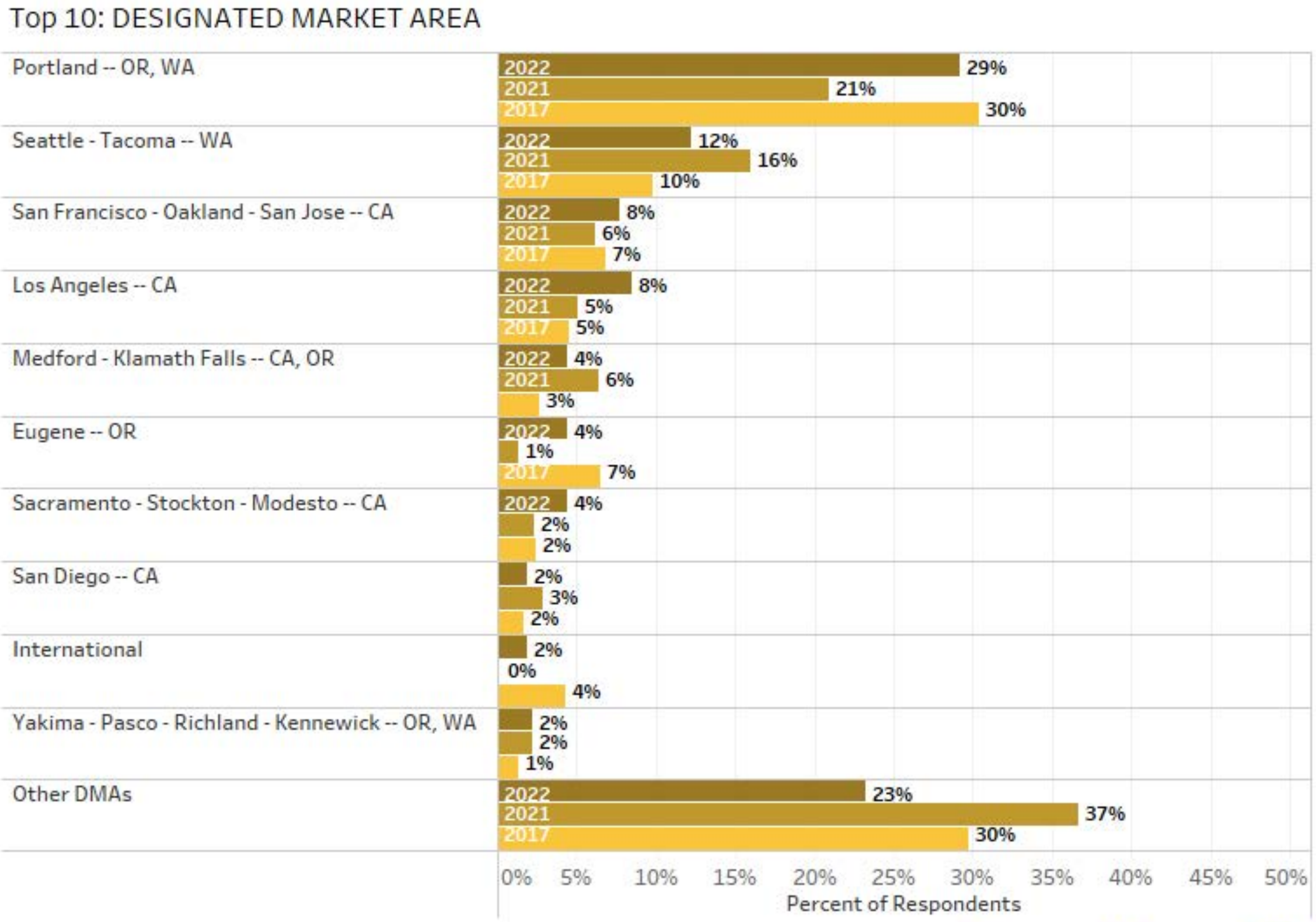
Sample sizes for displayed question: 2022 (n=271); 2021 (n=1,020); 2017 (n=1,493).
Sorted by leading 2022 share.

- Oregon (**35%**), California (**24%**), and Washington (**20%**) are once again the top three states of origin, comprising 79% of the total share of general summer respondents.

- However, within these states, the share of visitors from Oregon increased to **35%** (+11 ppts), while the share from Washington decreased to **20%** (-5 ppts).

DMA

Summer: 3-year comparison



Sample sizes for displayed question: 2022 (n=271); 2021 (n=1,020); 2017 (n=1,474).
Sorted by leading 2022 share.

- DMA distribution mirrors that of states shown in the previous slide, with areas in Oregon, Washington, and California continuing to remain the leading source of visitors. Notably, visitation became more concentrated to these areas this season, given the decrease in all "Other DMAs" to **23%** (-14 ppts).
- This season also saw increases in Oregon DMAs, including Portland (+8 ppts to **29%**) and Eugene (+3 ppts to **4%**).

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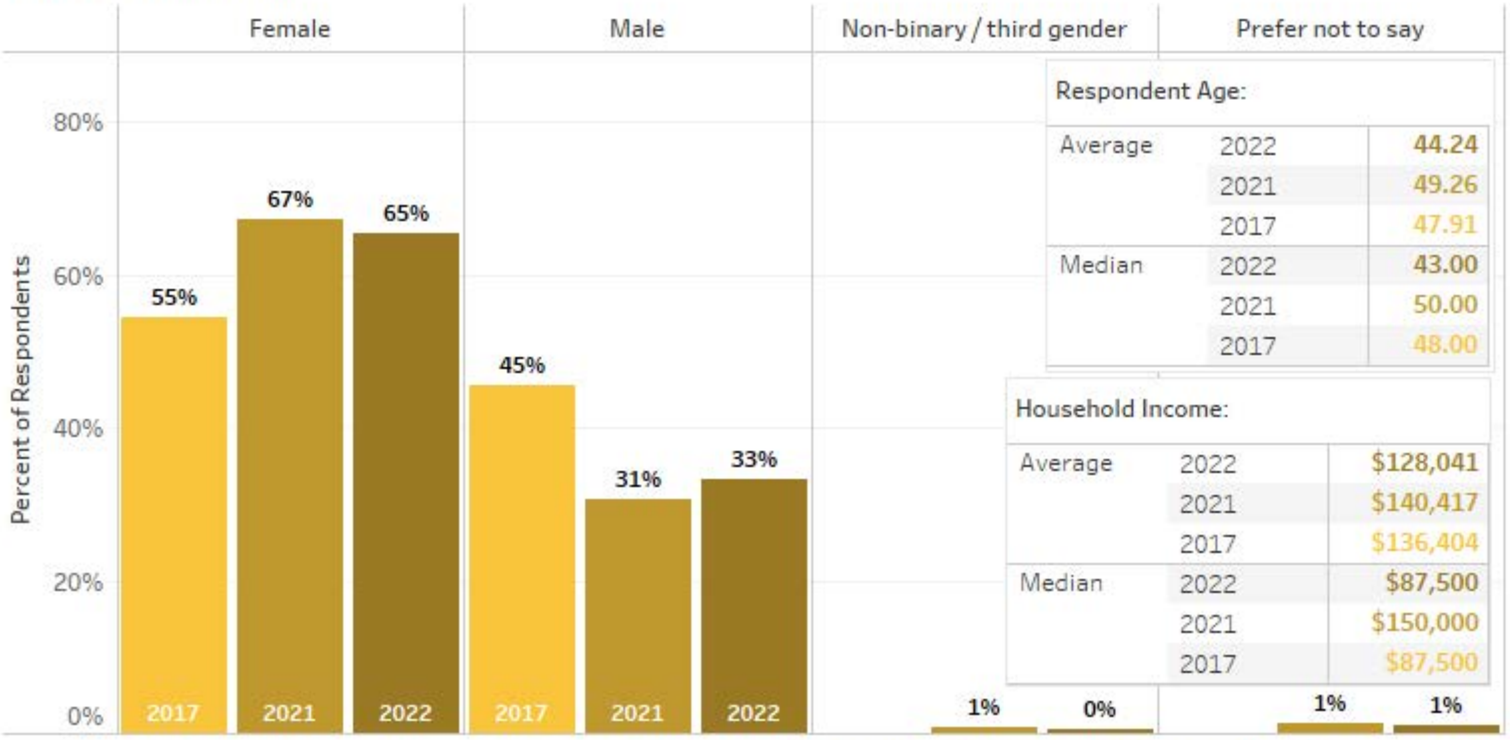
Demographics

Summer: 3-year comparison



Respondent Age:		
Average	2022	44.24
	2021	49.26
	2017	47.91
Median	2022	43.00
	2021	50.00
	2017	48.00

Household Income:		
Average	2022	$128,041
	2021	$140,417
	2017	$136,404
Median	2022	$87,500
	2021	$150,000
	2017	$87,500

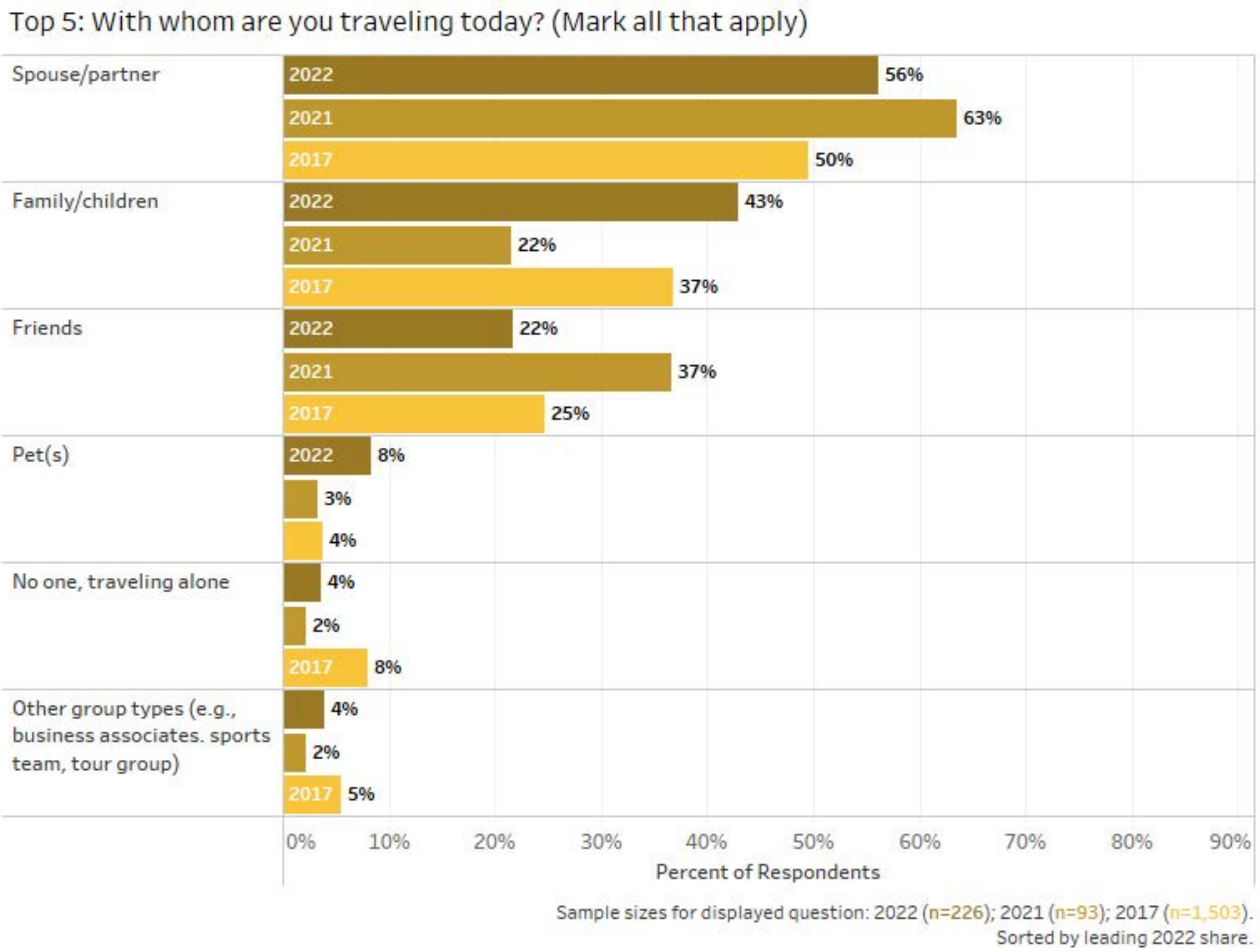
Sample sizes for displayed question: 2022 (n=214); 2021 (n=927); 2017 (n=1,439).

- Gender has remained largely consistent over the last 2 summers, with an approximate 65/35% distribution of females/males. The change from 2017 likely represents a by-product of shifting from intercept surveying to “self-selected” online surveying.

- After seeing increases in age and income in 2021, both decreased to a 3-year average low this summer: **44.2** years old (median: 43)

Travel Party

Summer: 3-year comparison



- Like previous summers, most respondents tend to be traveling with their spouse/partner (**56%**), broader family/children (**43%**), and/or friends (**22%**).
- Compared to last summer, a much larger share was traveling with their general family and children (+21 ppts) whereas a smaller share was traveling with friends (-15 ppts).

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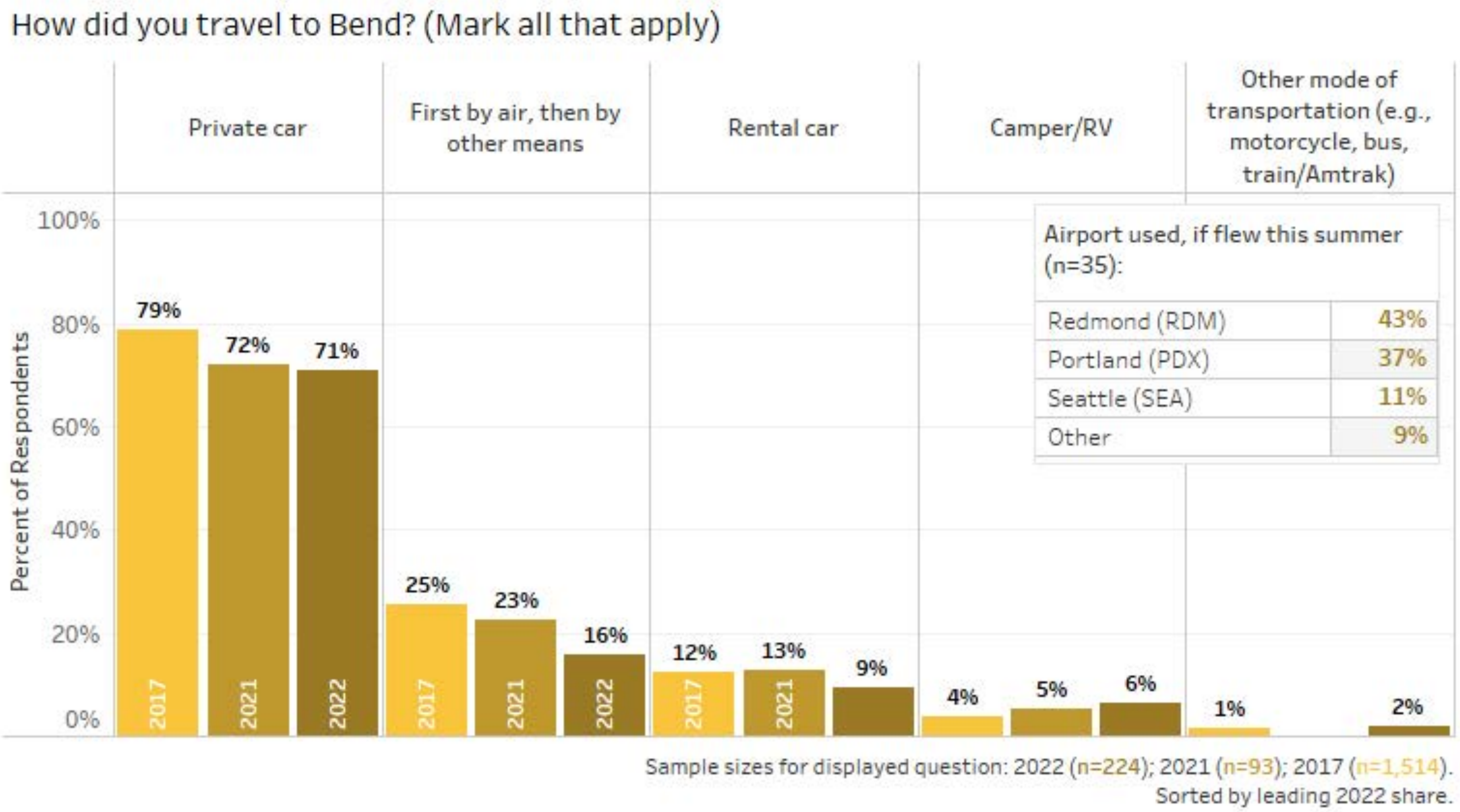
Mode of Transportation

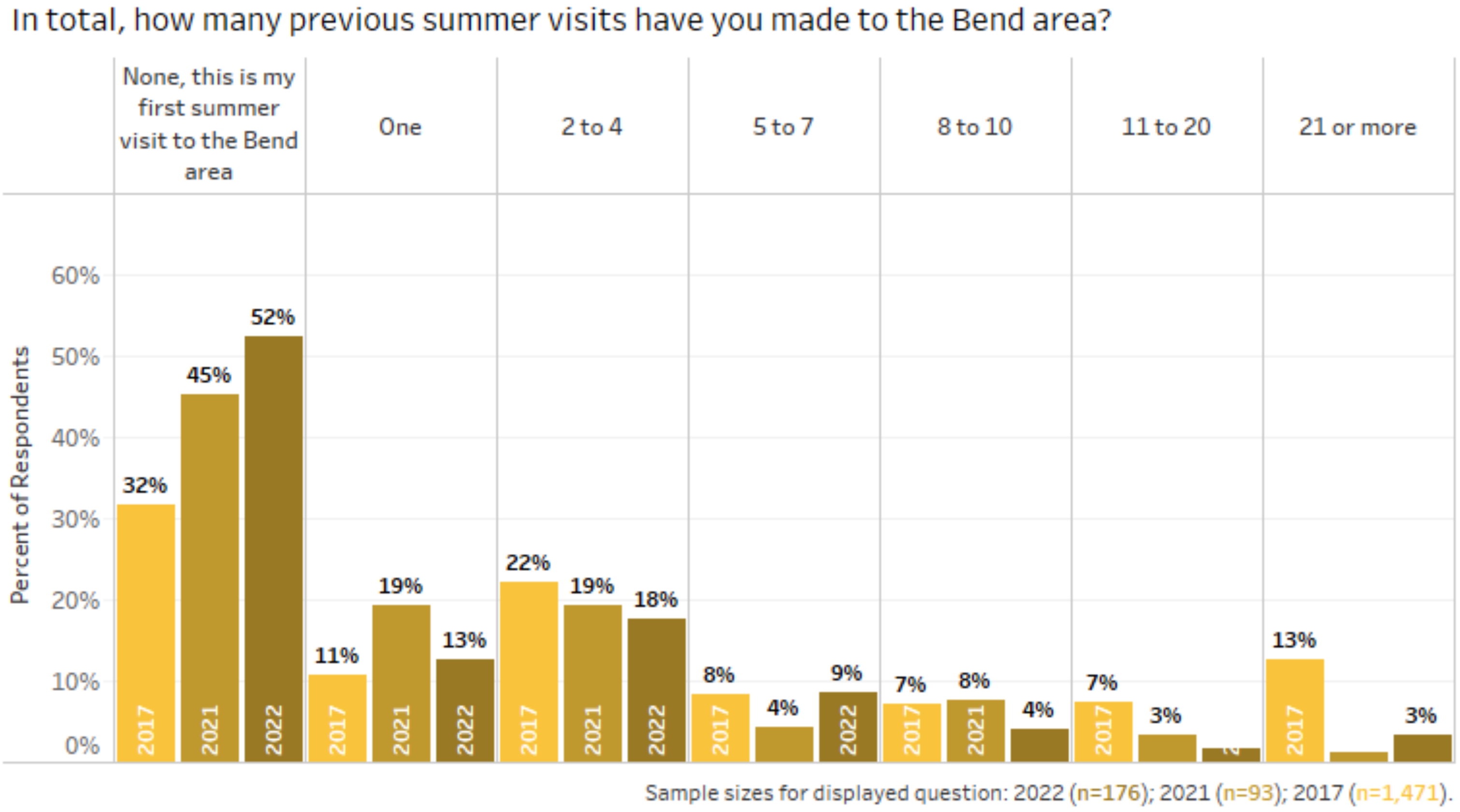
Summer: 3-year comparison



- This season saw a dip in air travel (-7 ppts to **16%**) and rental car shares (-4 ppts to **9%**), perhaps in part owing to the increase in the share of day visitors to Bend, as shown previously.
- Of those who used air travel this summer, **43%** flew through Redmond airport.
- Like last summer, nearly three-quarters (**71%**) of visitors used a private car during their travels.

Previous Summer Visits

Summer: 3-year comparison



- First-time summer visitors have increased over each season, reaching a 3-year high with over half (**52%**) of respondents in 2022.
- While Summer 2021 saw a modest spike in people who had visited once previously (to 19% from 11% in 2017), this figure decreased to **13%** in 2022.

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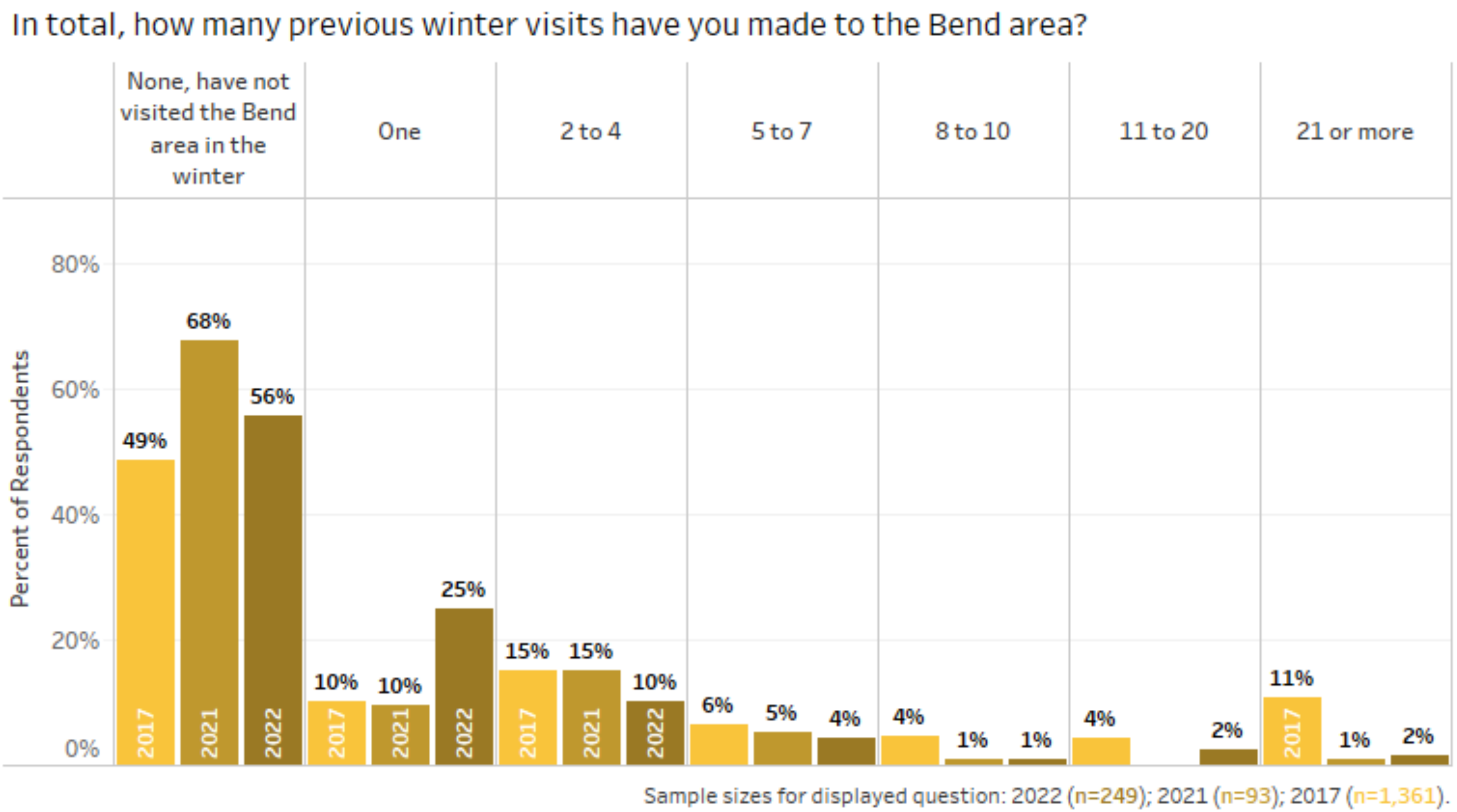
Previous Winter Visits

Summer: 3-year comparison



- The increase in first-time summer visitation may owe in part to a batch of new winter visitors. While most respondents across all seasons have not visited Bend in the winter, this share decreased to **56%** (-12 ppts from 68%) in 2022.
- Meanwhile, the share of respondents who had visited Bend in the winter once spiked from a steady 10% to **25%**.

Overnight Guests

Photo: visitbend.com

Accommodations and Trip Length

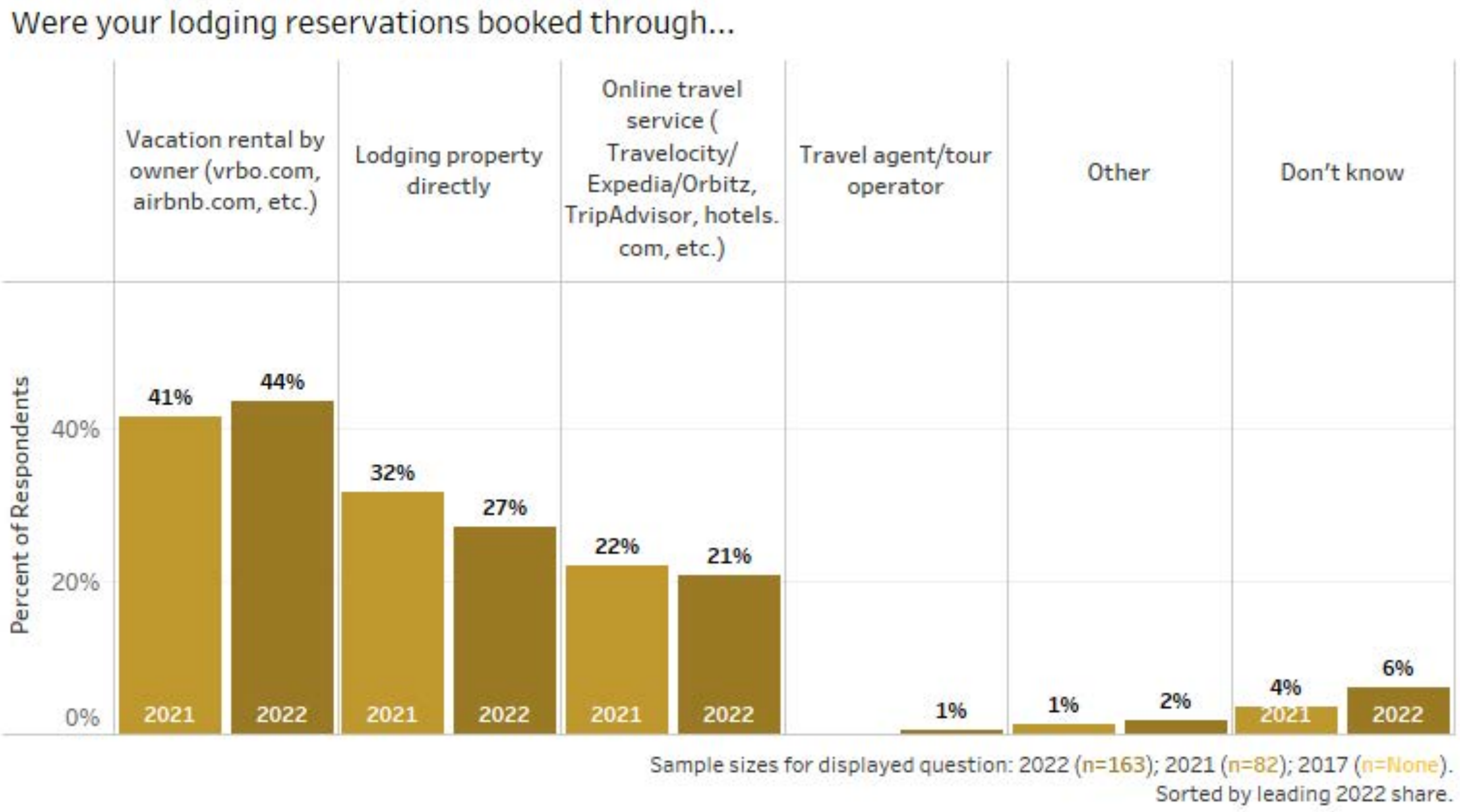
Summer: 3-year comparison

Sample sizes for displayed question: 2022 (n=247); 2021 (n=530); 2017 (n=1,420).
Sorted by leading 2022 share.

- **70%** of respondents rented their lodging this summer – a 3-year high for rental accommodations. Contributing to this figure is a rise in this summer's share of hotel/ motel rentals, which increased to **36%** (+8 ppts from a steady 28%).
- Conversely, a smaller share of respondents (**13%**, -8 ppts from 2021 and -15 ppts from 2017) were staying with friends/family.
- Median nights in the area remained steady at **3 nights**. However, average nights decreased to **3.5**, after seeing

Booking

Summer: 3-year comparison



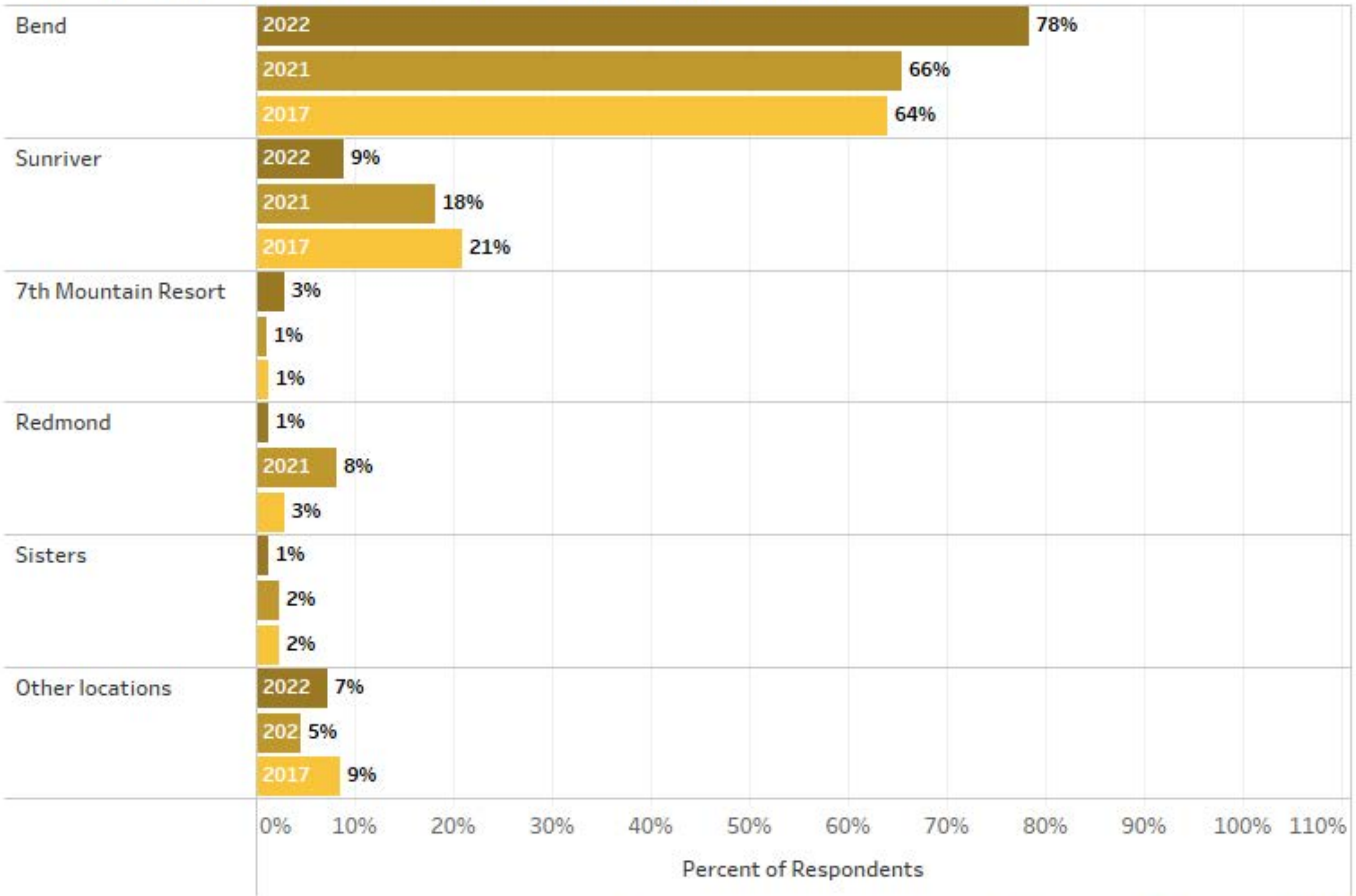
- Among respondents who rented their accommodations, booking strategies remained largely consistent year-over-year.

- Shares were allocated between vacation rental by owner websites (**44%**) for those seeking homes/condos, and either direct booking (**27%**) or travel services (**21%**) for those seeking hotels/motels.

Lodging Location

Summer: 3-year comparison

Top 5: Are/were this trip's lodging accommodations location in...



Sample sizes for displayed question: 2022 (n=245); 2021 (n=522); 2017 (n=1,427).
Sorted by leading 2022 share.

- Across all seasons, the largest share of respondents stayed in Bend or Sunriver. However, this summer saw an even larger share of visitors staying right in Bend (**78%**, up from 66%) – with a resultant decrease in the share staying in Sunriver (**9%** ... m 18%

78%

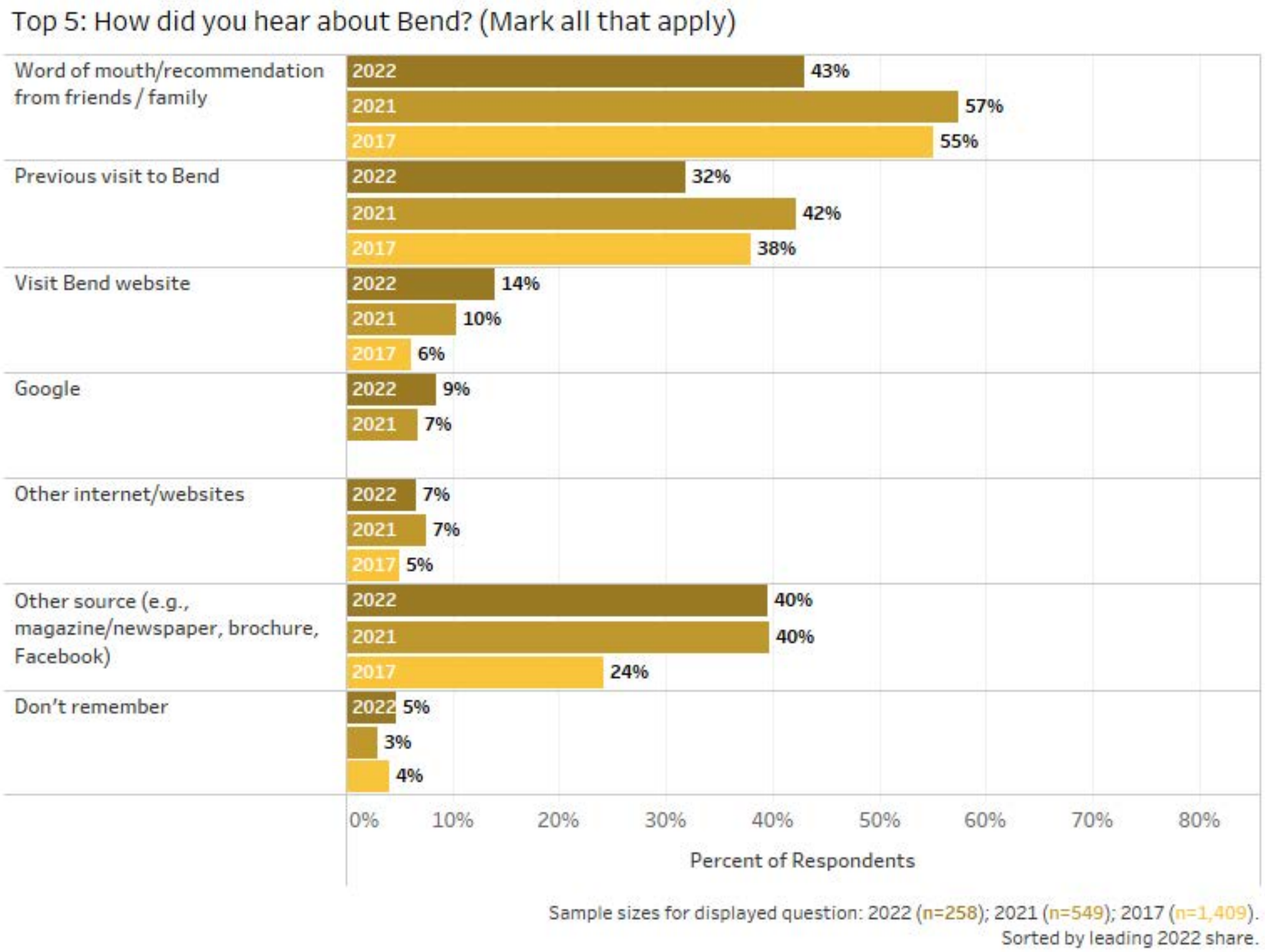
9%

Trip Characteristics / Travel Planning

Photo: visitbend.com

Hear about Bend

Summer: 3-year comparison



- This summer's respondents were driven somewhat less by word of mouth (**43%**, down from 57%) and previous visits (**32%**, down from 42%) than previous summers, each hitting 3-year lows. Nonetheless, these categories remain a strong source of guidance, with three-quarters of visitors selecting at least one of them.

- While no one "other" source constitutes a large share, it's collective share (**40%**) demonstrates the diversity in discovery among respondents and the utility of eclectic marketing.

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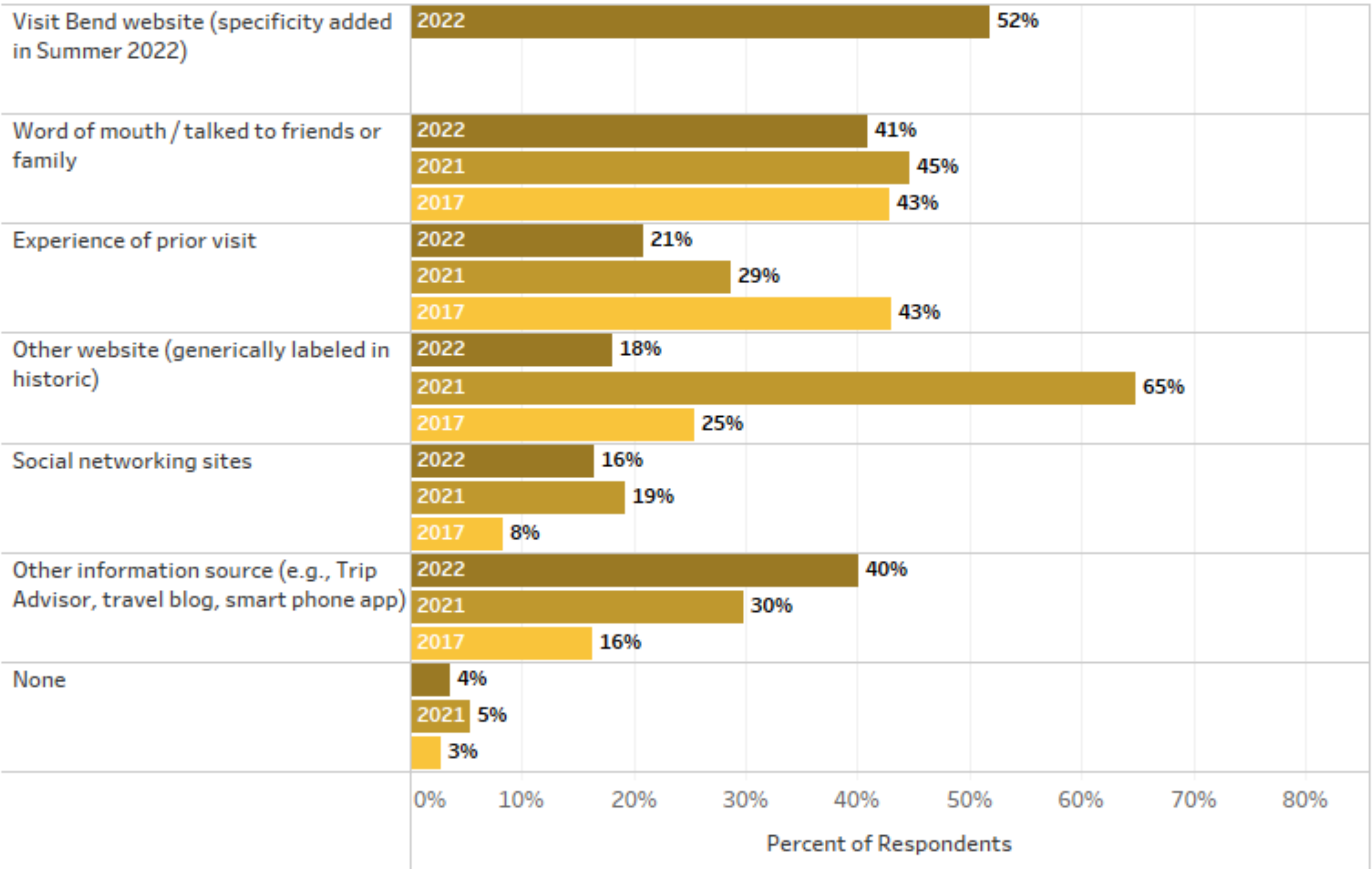
Bend Information

Summer: 3-year comparison

Top 5: Which of the following sources of information were most effective in planning your trip to Bend? (Mark all that apply)



Sample sizes for displayed question: 2022 (n=249); 2021 (n=94); 2017 (n=1,497).
Sorted by leading 2022 share.

- Visitors gathered information about Bend from a variety of sources. However, this summer's addition of the Visit Bend website to the list of information options resonated with over half of respondents (**52%**). This is likely attributable to most respondents being linked to the survey directly from the Visit Bend website.
- As a result of this addition, the share of respondents selecting "other website" decreased dramatically from 65% to **18%** - a share more comparable to 2017, when surveys were collected by intercept.

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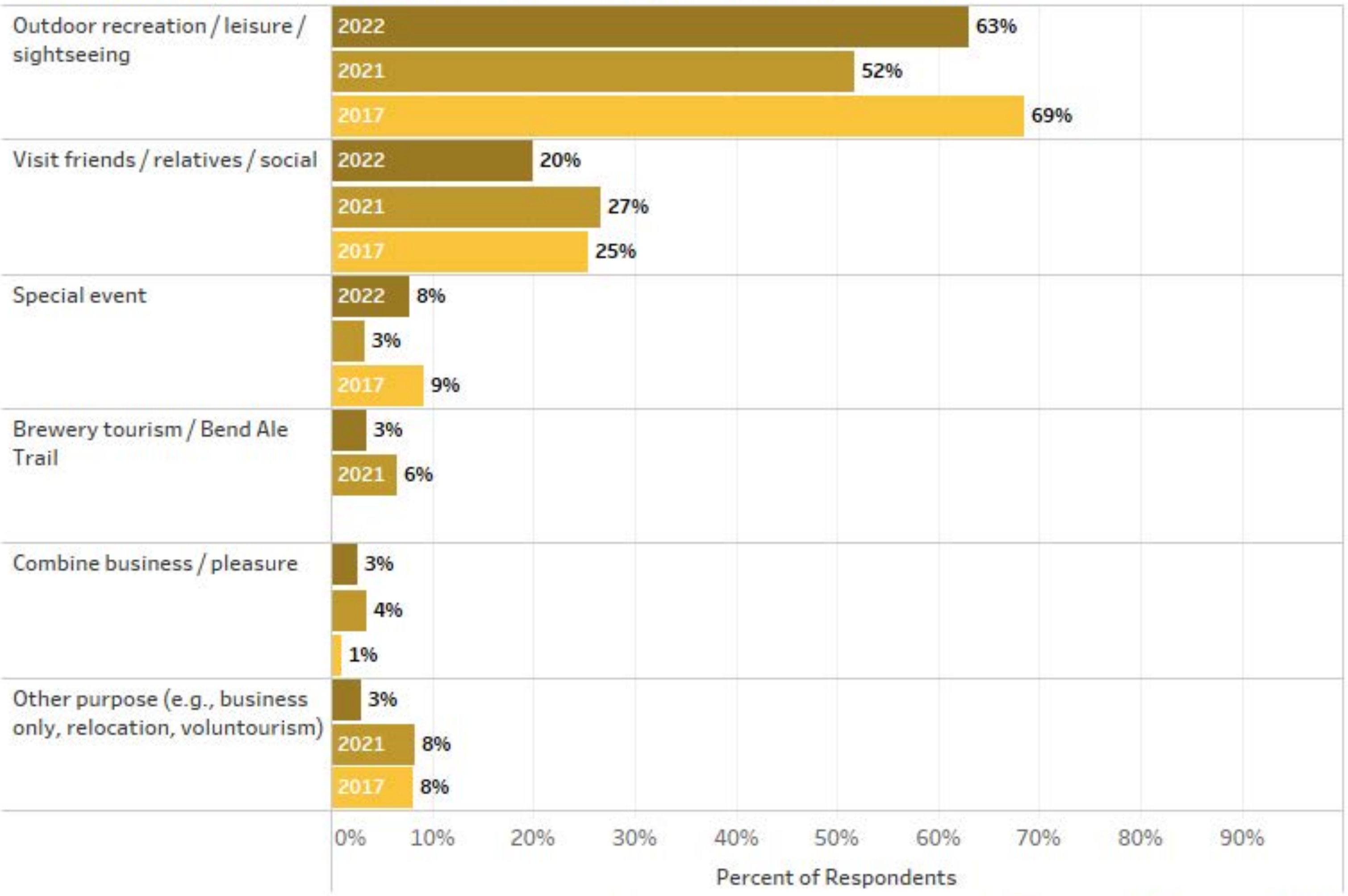
Trip Purpose

Summer: 3-year comparison

Top 5: What is/was the MAIN purpose of your visit to Bend area this trip?



Sample sizes for displayed question: 2022 (n=230); 2021 (n=570); 2017 (n=1,388).
Sorted by leading 2022 share.

- Across each season, the largest shares of respondents were visiting either for outdoor recreation/leisure or for social reasons (e.g., visiting friends/relatives). This summer, a collective **83%** were in Bend for one of these two reasons.
- A larger share of respondents were in Bend to recreate this summer (**63%**, up from 52%). Consequentially, a smaller share was in Bend to visit

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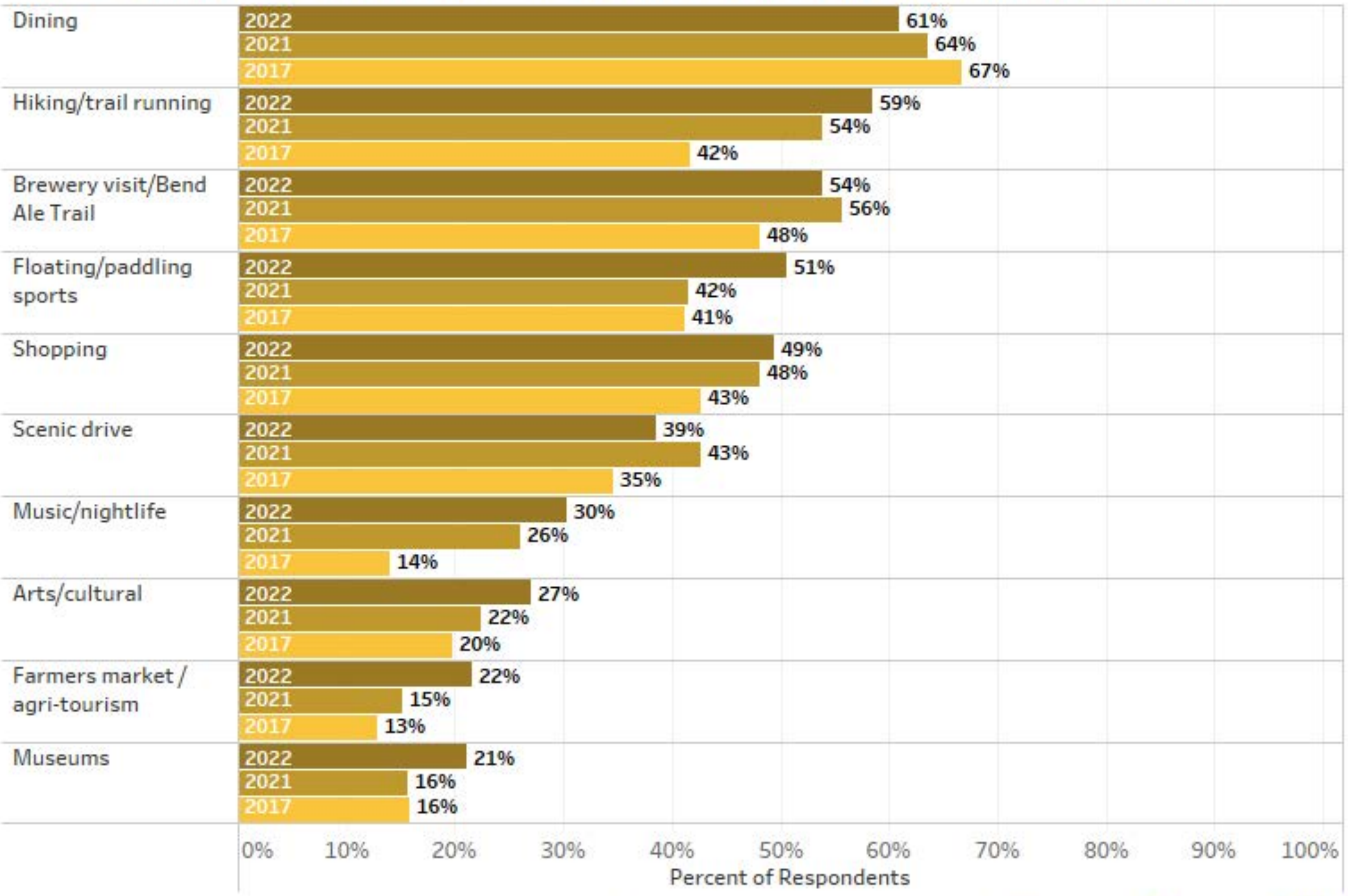
Activity Participation

Summer: 3-year comparison

Top 10: What kind of activities did you or will you do while on this trip? (Mark all that apply)



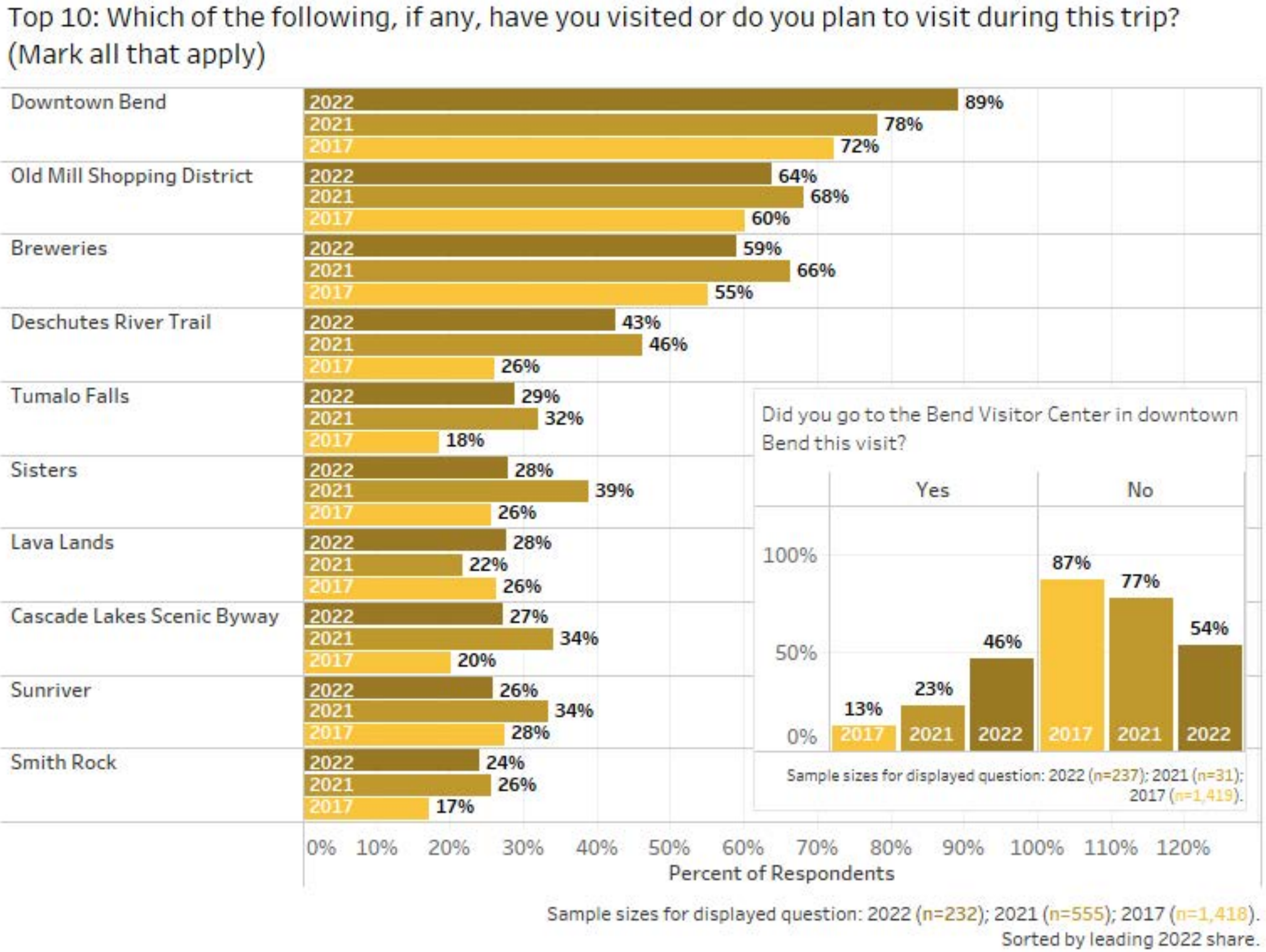
Sample sizes for displayed question: 2022 (n=241); 2021 (n=558); 2017 (n=1,493).
Sorted by leading 2022 share.

- Over the past two summers, over half of respondents participated in at least one of the following during their trip: dining, hiking, and brewery visits. Dining has remained the activity with the largest share of participation (at least 60%) in every summer.

- This summer saw an increase in float trip/paddling participation to **51%** (+9 ppts). Additionally, steady 3-years increases were documented for music/ nightlife,

Attractions Visited

Summer: 3-year comparison



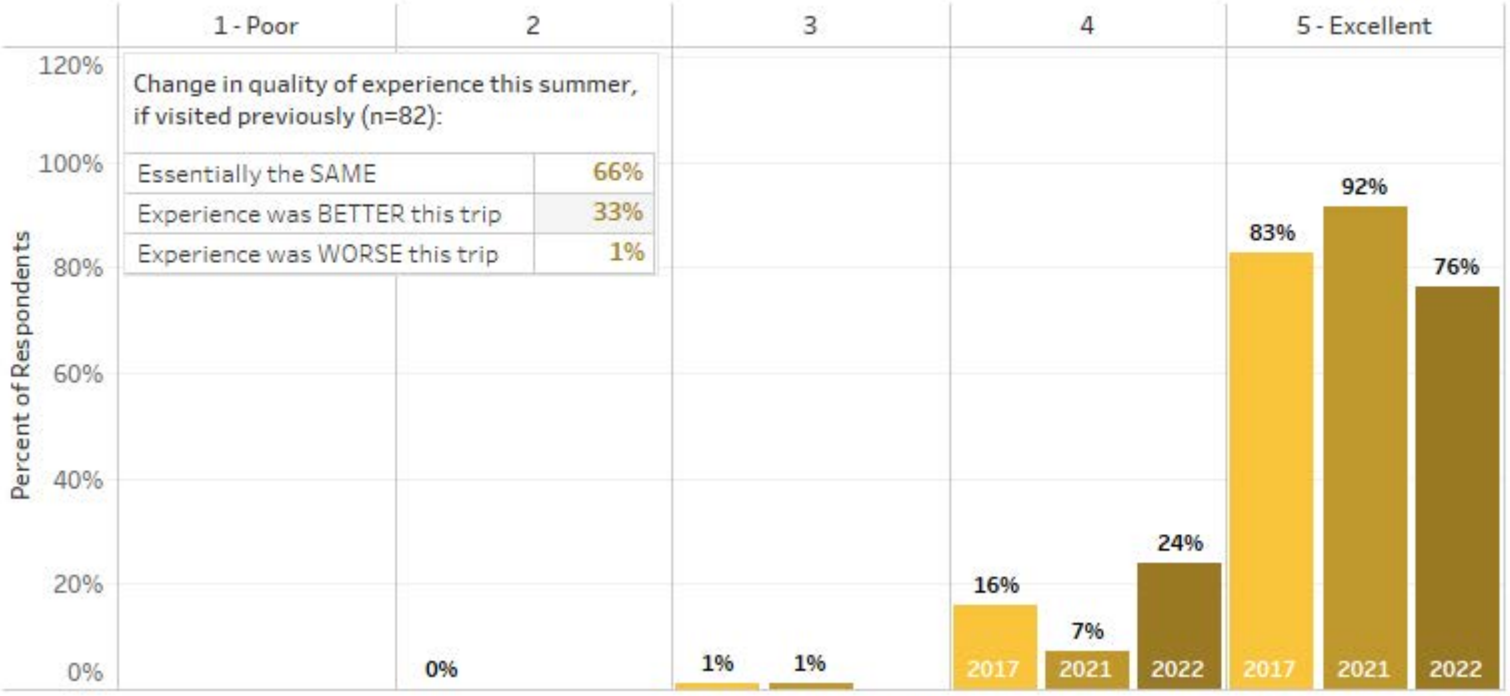
- Across each summer, over half of respondents had visited at least one of the following: Downtown Bend, Old Mill Shopping District, and Breweries.

- The share of respondents visiting Downtown Bend has increased each summer, hitting a 3-year high of **89%** (+11 pts) in 2022. This is correlated with a steadily increasing share of respondents stopping in at the Bend Visitor Center, which also hit a 3-year high of **46%** (up from 23%).

Recreation Satisfaction

Summer: 3-year comparison

On a scale of 1 to 5 where 1 is Poor and 5 is Excellent, how would you rate the overall quality of your recreation experience in and around the Bend area?



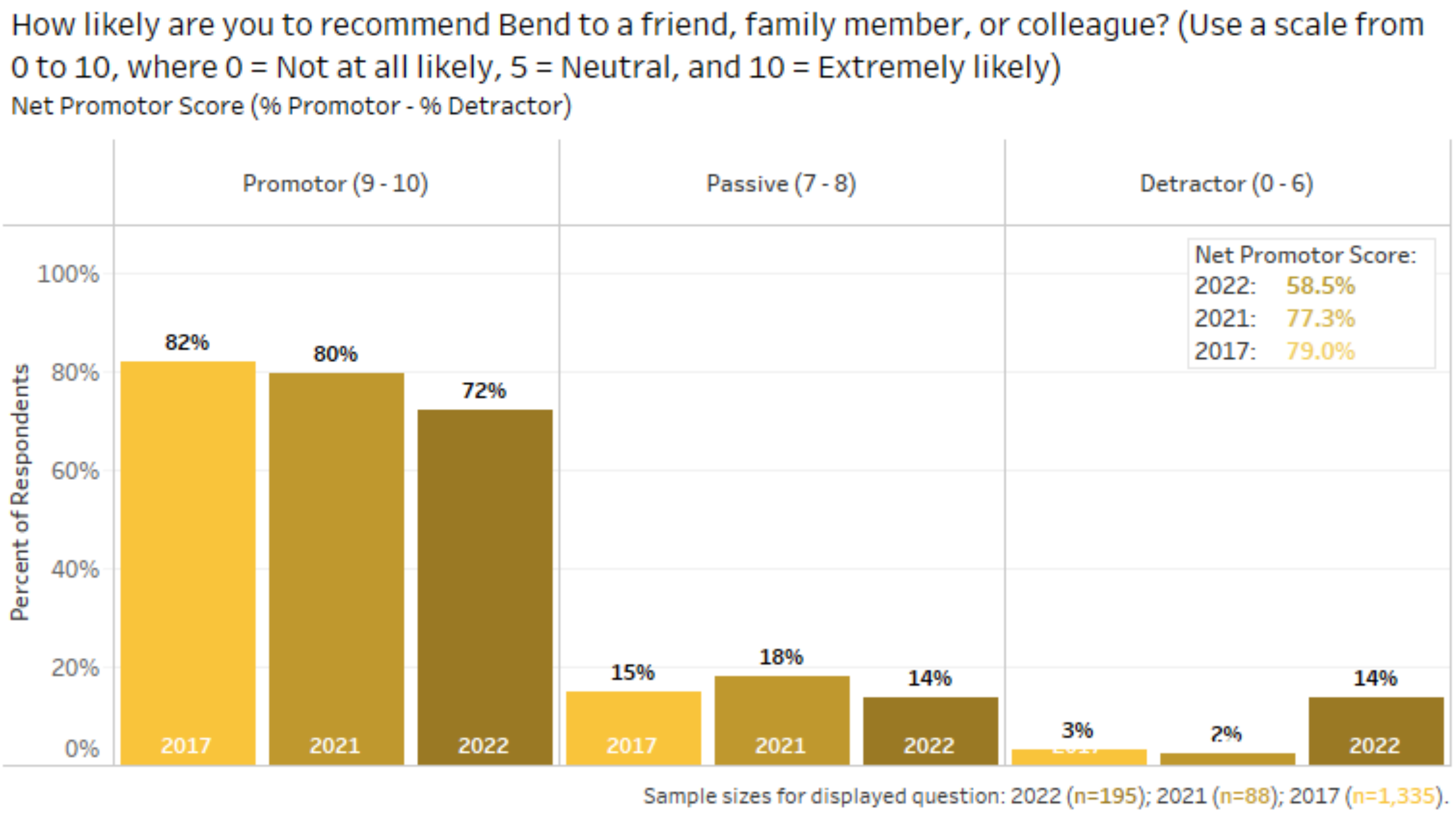
Sample sizes for displayed question: 2022 (n=172); 2021 (n=83); 2017 (n=1,272).

- On a scale of 1 (Poor) to 5 (Excellent), nearly 100% of respondents each year indicated their recreation experience was either a 4 or 5. Furthermore, over three-quarters rated their experience as "Excellent" in each year.

- However, compared to previous seasons, a smaller share reported a 5 this summer (**76%**, down from 92% in 2021 and 83% in 2017). Nonetheless, few to no repeat visitors indicated that their experience was worse than their previous

Likelihood to Recommend

Summer: 3-year comparison



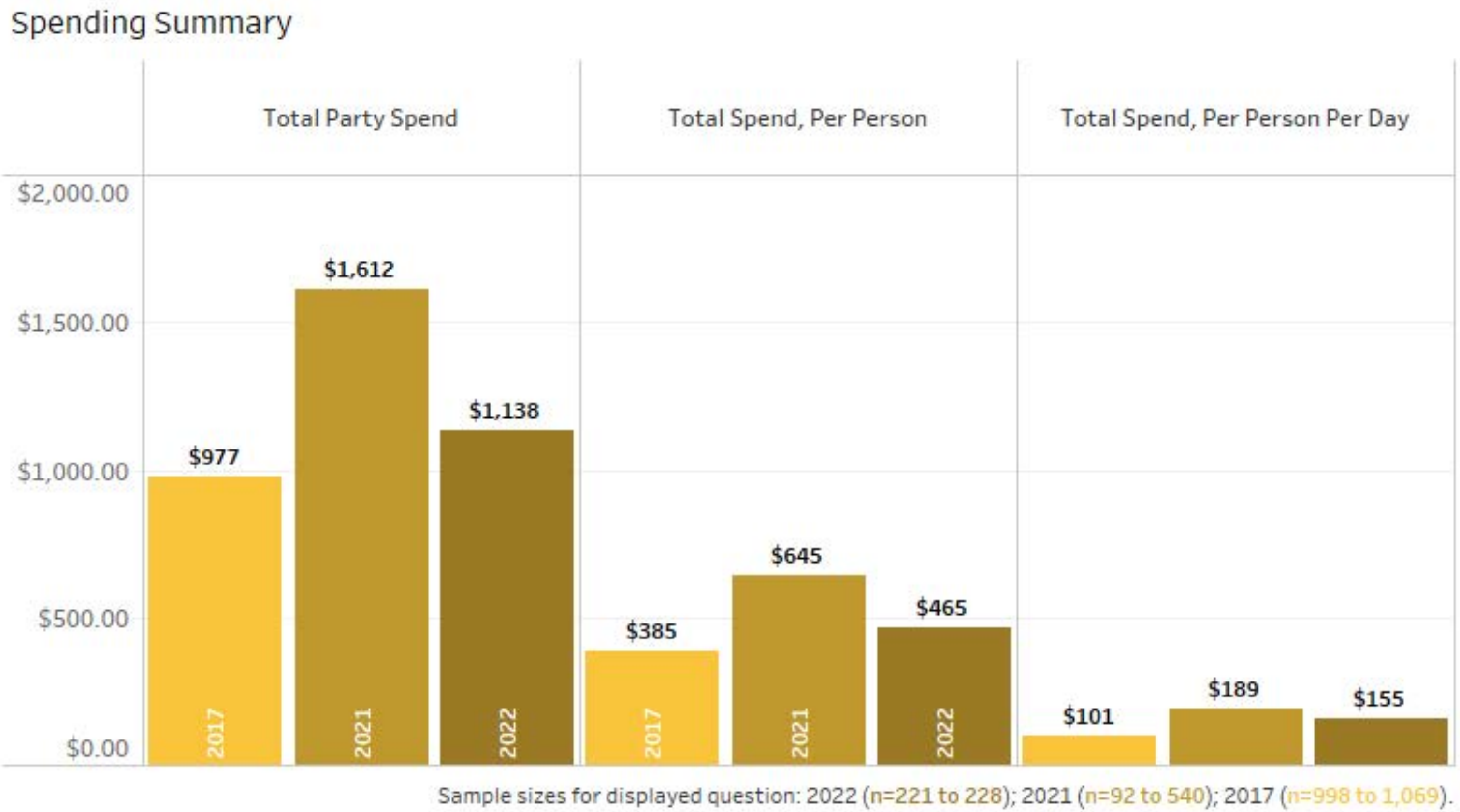
- Over 70% of respondents are classified as a Promotor in each season – meaning they provided a rating of 9 or 10 on the likelihood to recommend question.
- However, this season saw a decrease in Promotors to **72%** (-8 ppts) and a corresponding rise in Detractors to **14%** (+12 ppts) with the bulk of Detractors providing a rating of 4 or 5.
- Among comments about what one would change in Bend (when excluding local residents), repeated sentiments include **cost of living** and

Trip Expenditures

Photo: visitbend.com

Spending Summary

Summer: 3-year comparison



- 3-year patterns of spending follow similar patterns at all levels. Spending spiked in 2021, then receded in 2022 to the following:

- Total Party Spend: **$1,138** (down from $1,612 in 2021)
- Spend, Per Person: **$465** (down from $645)
- Spend, Per Person Per Day: **$155** (down from $189)

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Party Expenditures

Summer: 3-year comparison

- Average party expenditures mirror that of per person expenditures. Each category notably decreased compared to 2021 but remained moderately higher than 2017.

Expenditures, Per Person

Summer: 3-year comparison

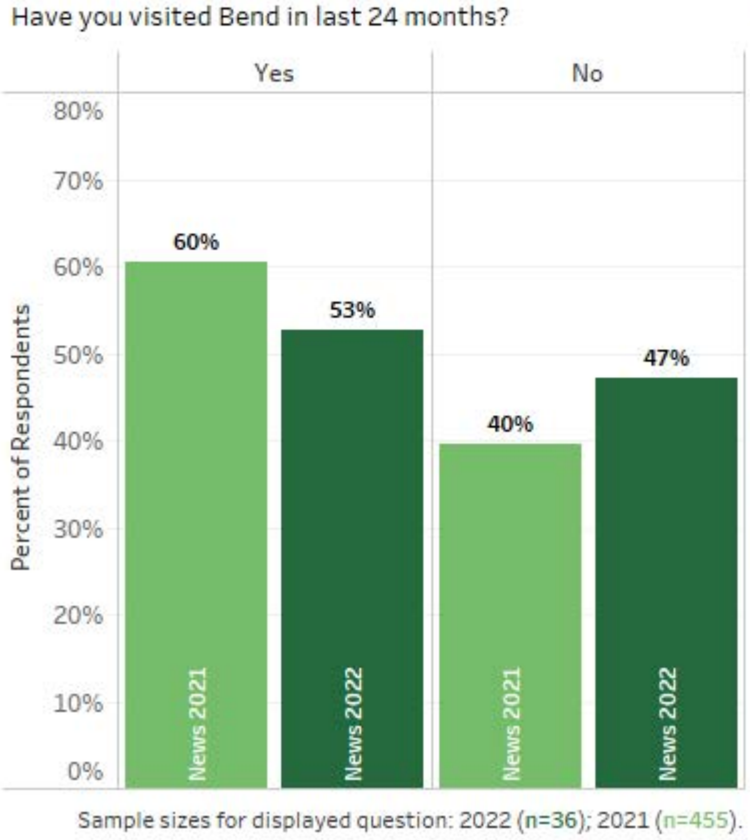
- Average expenditures per person spiked in every category in the Summer of 2021. However, all category averages decreased this summer, with all but lodging returning to values generally comparable to 2017. Food & Drink, Shopping, and Other Recreation are approximately $10-$20 higher than 2017.
- Lodging remained the highest per-person expenditure category at **$213**, $60 higher than lodging spending in 2017.
- Median party size remained constant at **2 people**. Average party size increased very slightly from 2.89 in 2021 to

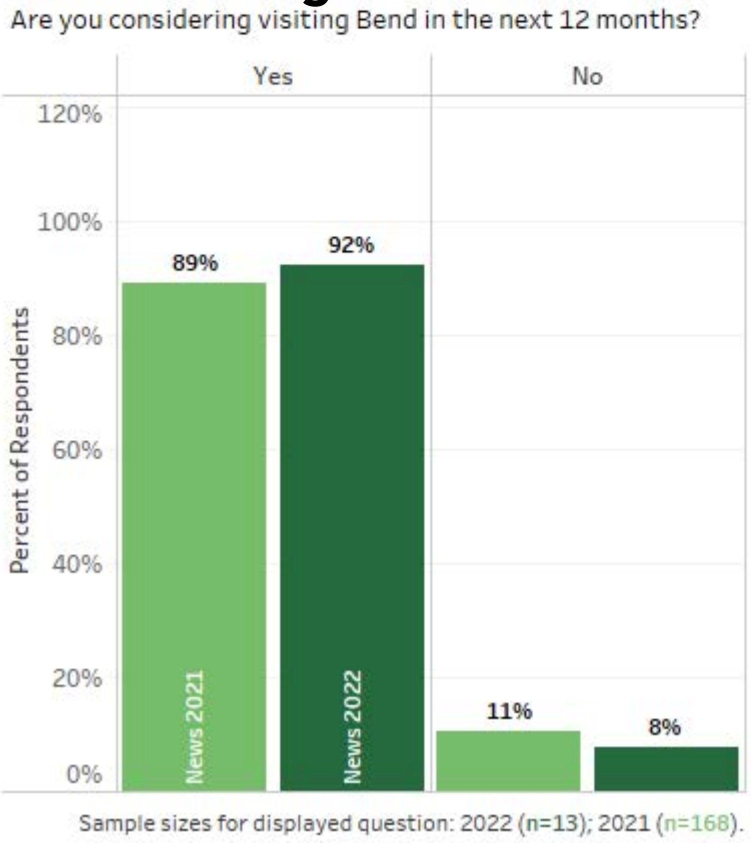
Prospective Visitors

Photo: visitbend.com

Newsletter Respondents and Prospective Visitors

The following slides highlight results from newsletter respondents who expressed interest in visiting Bend sometime in the next year. While this summers' results are presented for comparison to 2021, very small sample sizes restrict the validity of broad generalizations. ***Caution should be used when making inferences.***

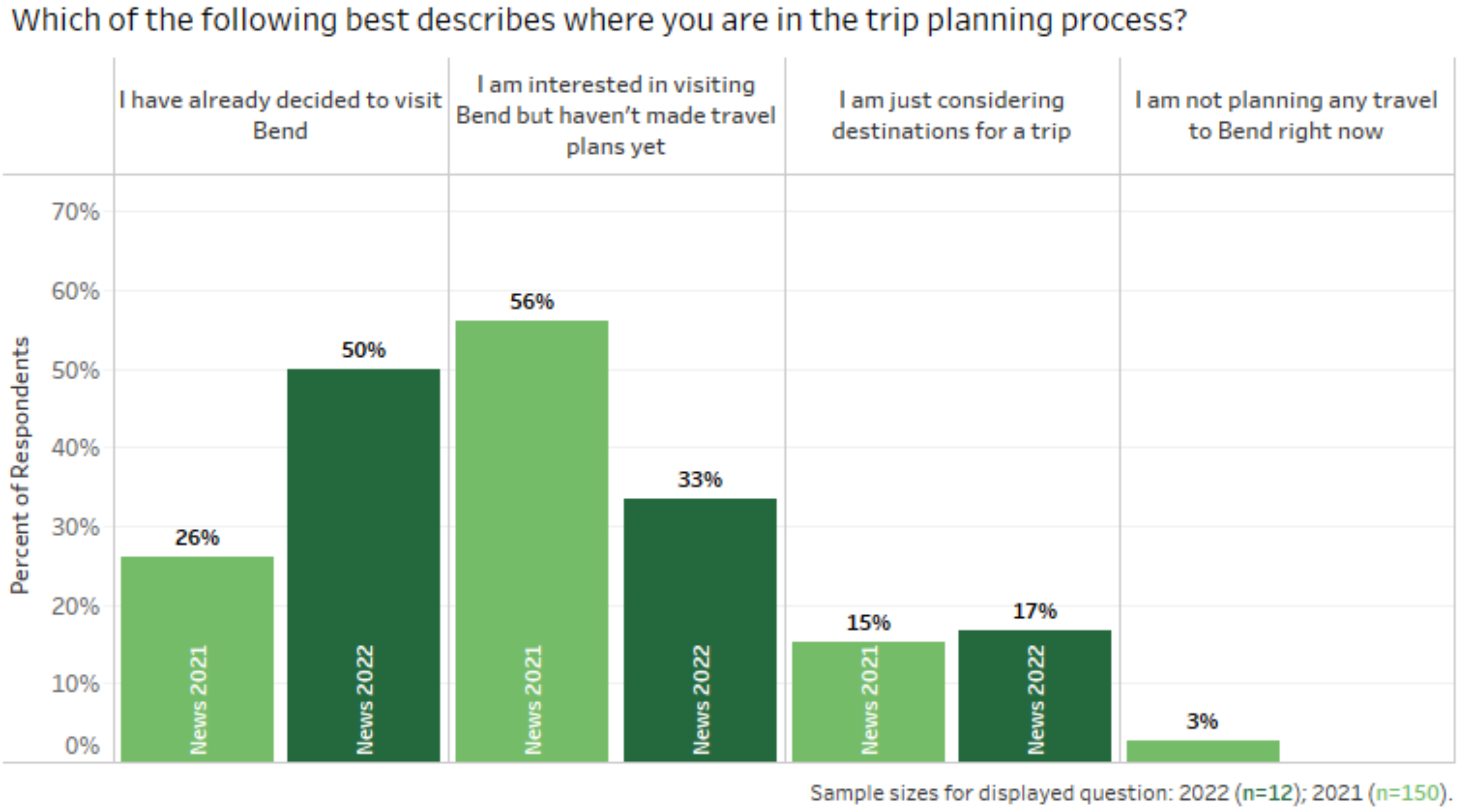




- Among newsletter respondents, over half (**53%**) have visited Bend in the last 24 months – down 7 ppts from 60% in 2021.
- Among newsletter respondents who have not visited Bend in the last 24 month, **92%** were considering a trip to Bend in the next year.

Prospective Planning

Summer Newsletter: 2-year comparison



- Of respondents considering a trip to Bend in the next year, half (**50%**) have already decided to visit and another third (**33%**) were interested but have not made definitive travel plans.
- The shares of these two groups were approximately inverted from 2021, in which over half (56%) had not yet made travel plans.

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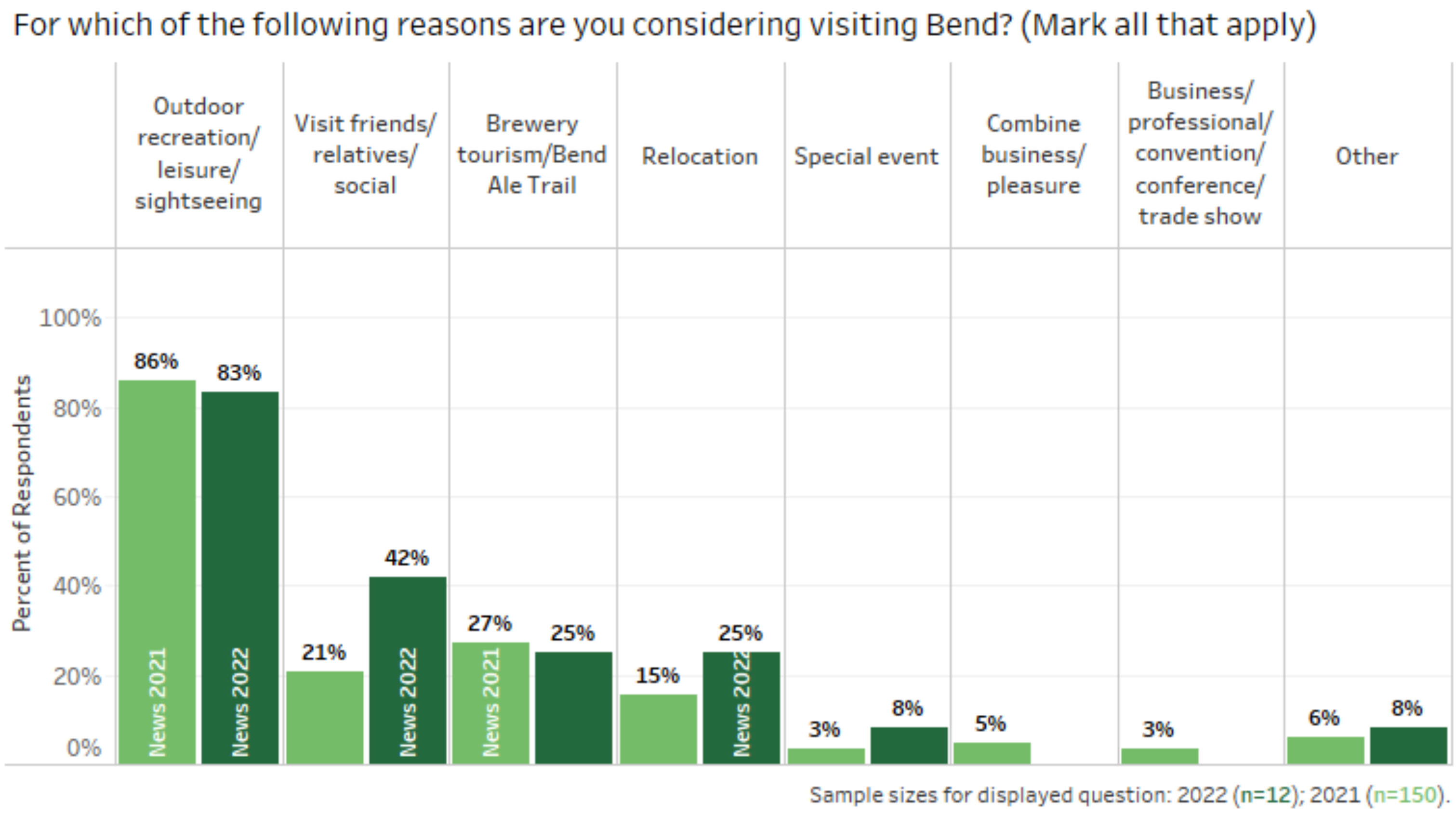
Prospective Reasons for Visiting

Summer Newsletter: 2-year comparison

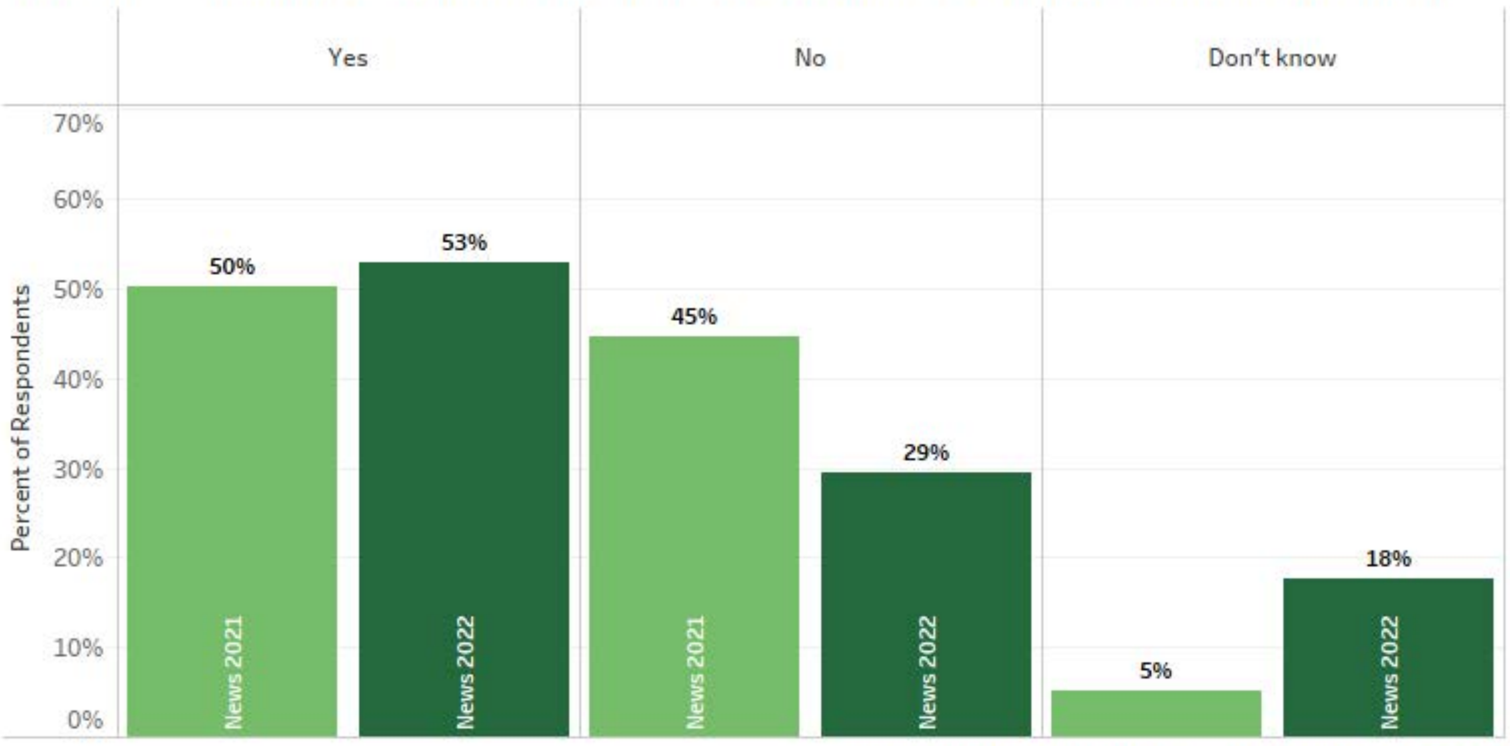


- Across both seasons, over 80% of newsletter respondents were interested in Bend for its outdoor recreation/leisure.
- Somewhat larger shares of respondents were interested in Bend for visit friends/family/ social reasons (**42%**, up from 21%) and relocation (**25%**, up from 15%) purposes this year.

Advertisement

Summer Newsletter: 2-year comparison

Have you seen or heard any advertising about Bend in the past 12 months? (Mark all that apply)



Sample sizes for displayed question: 2022 (n=17); 2021 (n=173).

- Among all newsletter respondents (including prospective visitors and those who had already visited), over half (**53%**) had seen an advertisement for Bend sometime in the past 12 months.

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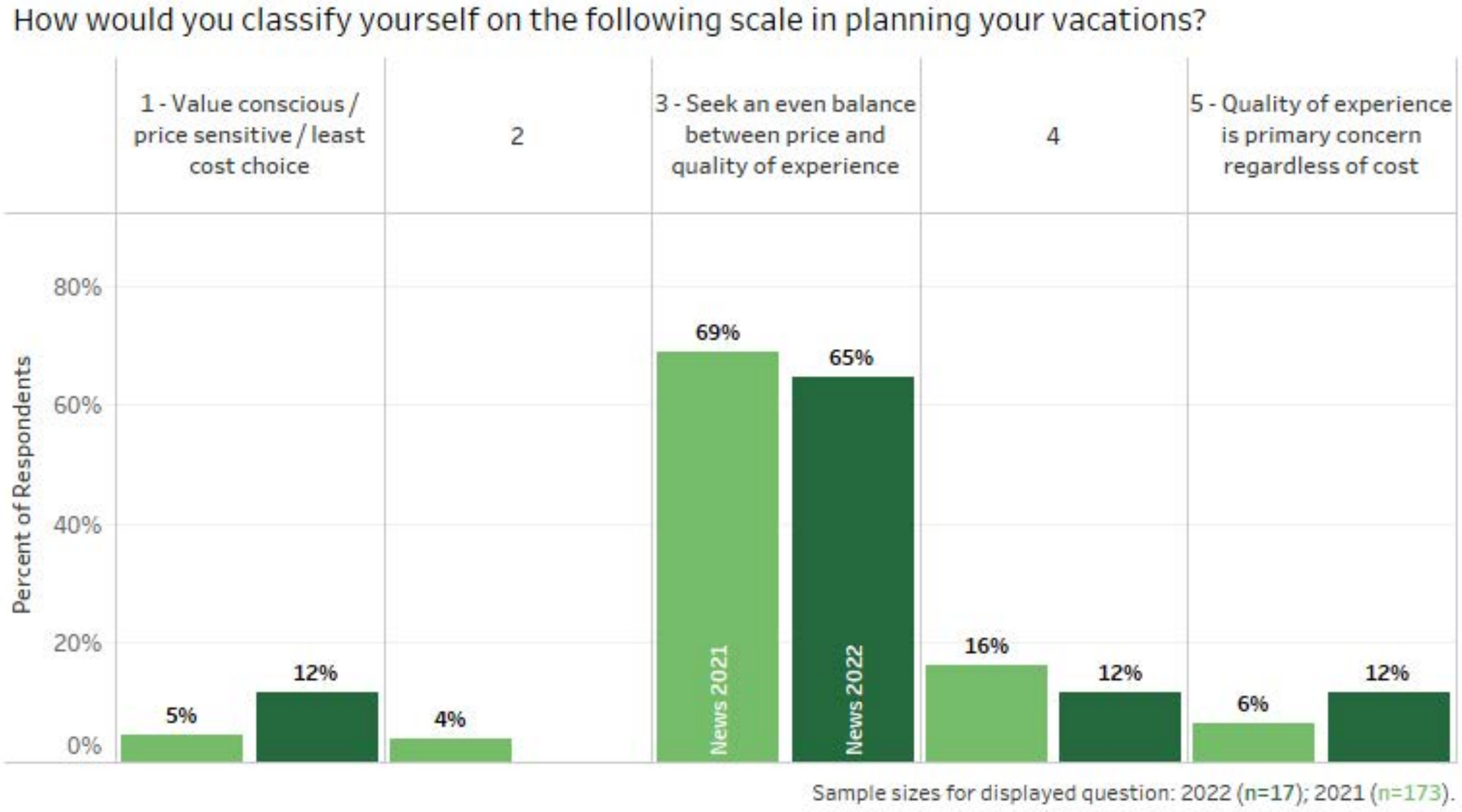
Planning Style

Summer Newsletter: 2-year comparison



- About two-thirds (65-69%) of newsletter respondents considered themselves to seek an even balance between vacation cost and quality of experience.
- Apart from this balance-seeking group, larger share of respondent in both summers prioritized quality of experience over cost (22-24% rating 4/5; 9-12% rating 1/2).

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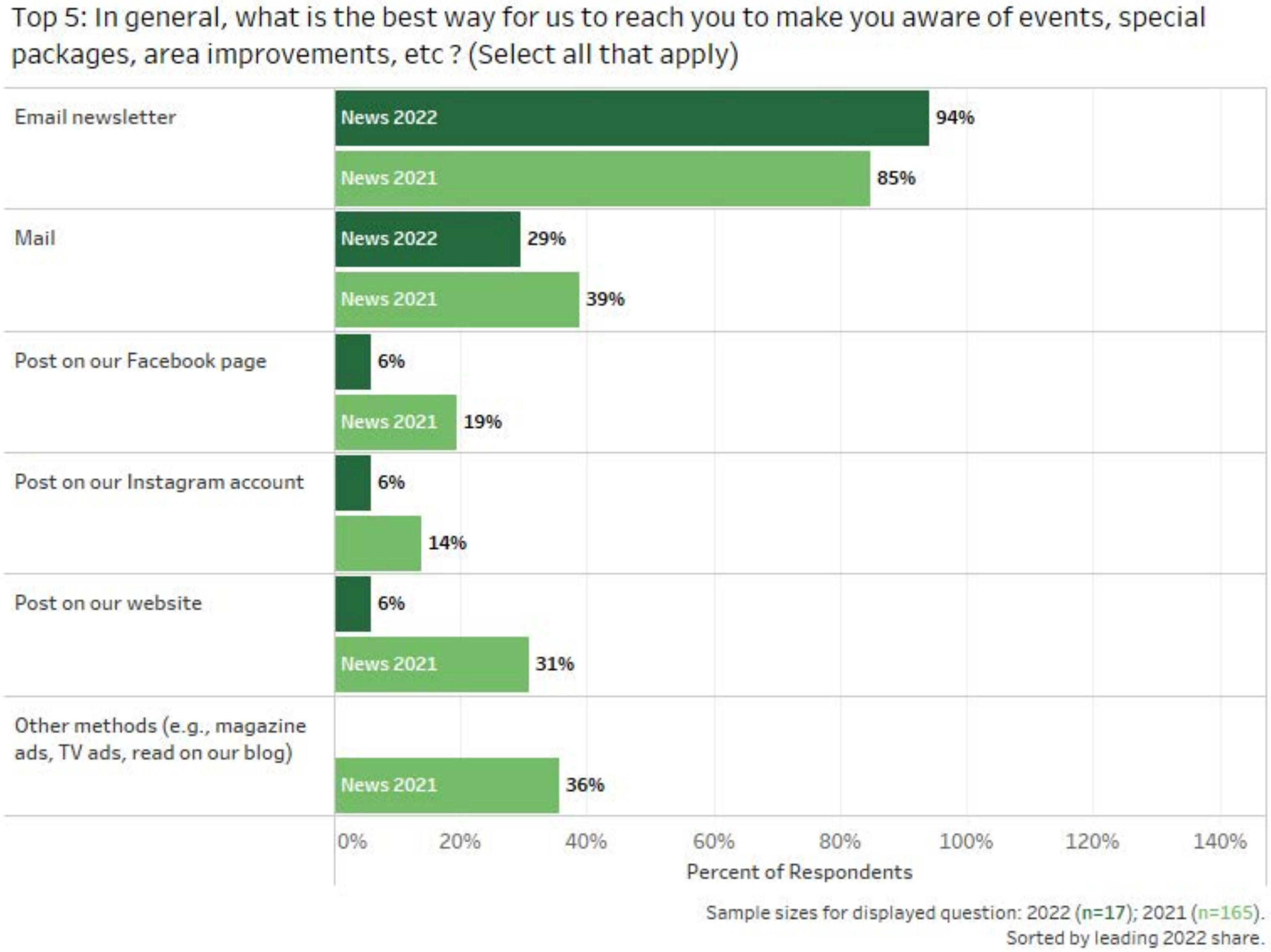
Means of Contact

Summer Newsletter: 2-year comparison



- Reasonably, the largest share of newsletter respondents indicated that the email newsletter was an appealing method of contact (85-94%).

- Other popular methods of contact included physical mail (**29%**), social media (e.g., Facebook and Instagram) (a collective **12%**), or the Visit Bend website (**6%**).

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Destination Priorities

Summer Newsletter: 2-year comparison

Top 10: Important factors in choosing a vacation destination, on average.

Sample sizes for displayed question: 2022 (n=17); 2021 (n=165).
Sorted by leading 2022 average.

- Newsletter respondents were asked to rate 18 factors in choosing a vacation destination. Scores for the Top 10 factors, on average, remained largely consistent year-over-year.
- Scenic beauty was the highest ranked in both seasons (at **4.4/5**), followed closely by atmosphere, overall value, quality of accommodations, fun and excitement.
- This year's respondents anticipated taking more trips this year than last (**6.1** vs. 3.8).

Thank You

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