Visit Bend Visitor Survey

Winter 2021/22 Results

Photo: visitbend.com

Photo: visitbend.com

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Introduction

Beginning in 2008, RRC has conducted visitor research in both summer and winter seasons approximately every two years to monitor a variety of visitor and trip characteristics. This winter's 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.

Methodology

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. Winter 21/22 continued the use of both methodologies. The analyses in this report compare this winter's visitor results to two seasons of historic general data and one season of newsletter data.

Sampling

- Online survey distributed through a targeted, **geo-fenced social media** campaign by Visit Bend through Facebook and Instagram (n=653); along with an online kiosk survey in the Visit Bend Visitor Center and posted at the **Visit Bend website** (n=89). These two samples are combined, for a total n=742 and is compared against previous winter data from 2020/21 (distributed online) and 2019/20 (distributed via intercept). This is referred to as the *general sample* throughout the report.
- Online survey distributed to the Visit Bend **E-Newsletter database** (n=144) in April. A similar E-Newsletter survey was in Winter 2019/20 and serves as a historic comparison point for this sample.
- The following results focus specifically on visitors to Bend, including overnight visitors, day visitors, and seasonal residents.

n=742
Online Visitor Surveys
(653 social media surveys; 89 website surveys)

n=144
Newsletter Survey

Half (50%) of newsletter respondents had not visited Bend within the last 24 months and were asked a separate set of questions. These respondents are considered “prospective” visitors for purposes of analysis (discussed at the end of the report).

Executive Summary

- **Trip Length:** The length of the visit to Bend was up, to an average of 4.9 nights from 3.9 nights two winters ago, with particular strength in stays of 10 or more nights. This pattern could be related to the pandemic and flexible/remote work. At the same time, the average party size decline, to 2.7 people from 3.2 people. About half of visitor parties were two-person couples, while one in six was a solo traveler.
- **Age of Visitors:** The age demographic of visitors this winter was older than in the past, with the average age of 49 Increases were seen in the 45 and older age groups, and declines were observed for the 44 and younger age groups. The surveys this winter also captured more female respondents than in the past.
- **Staying With Friends/Family:** The impact of local residents in terms of generating tourism in Bend was apparent this winter, with increased shares of visitors staying with family and friends. Overall, 35% of winter visitors were staying with family and friends, double the share from the winter of 2019/20 (17%). Commensurately, the share of visitors staying in paid lodging (hotel, motel, condo, etc.) declined.

Executive Summary

- **Rent by Owner Lodging:** For those visitors staying in paid lodging, bookings through a "rental by owner" site (such as Airbnb, vrbo, homeaway, etc.) represented over half of the overnight lodging reservations this winter in Bend. The increase in this channel is not surprising but presents challenges and issues with monitoring and tracking reservation activity.
- **Information Sources:** Websites, prior visits, and word of mouth/friends & family were the top information sources for planning the trip to Bend. Website usage was up dramatically from two winters ago. Newsletter survey respondents were more likely to utilize more traditional information sources, such as a brochure or direct mail, a newspaper/magazine article, and the email newsletter itself.
- **Increase in First Time Visitors:** This winter's visitor was much more likely to be a first-time visitor to Bend, with two-thirds of the respondent sample indicating that they had not previously been to Bend (up from 47% in 2019/20). The first-time visitor has different needs and expectations than repeat visitors.
- **Activities in Bend:** Visitors were more apt to participate in dining out, shopping, scenic drives, brewery visits, and hiking than two winters ago, and less likely to be downhill skiing/snowboarding. This shift in activities might have contributed to busy restaurants and shops, and higher sales tax for Bend.

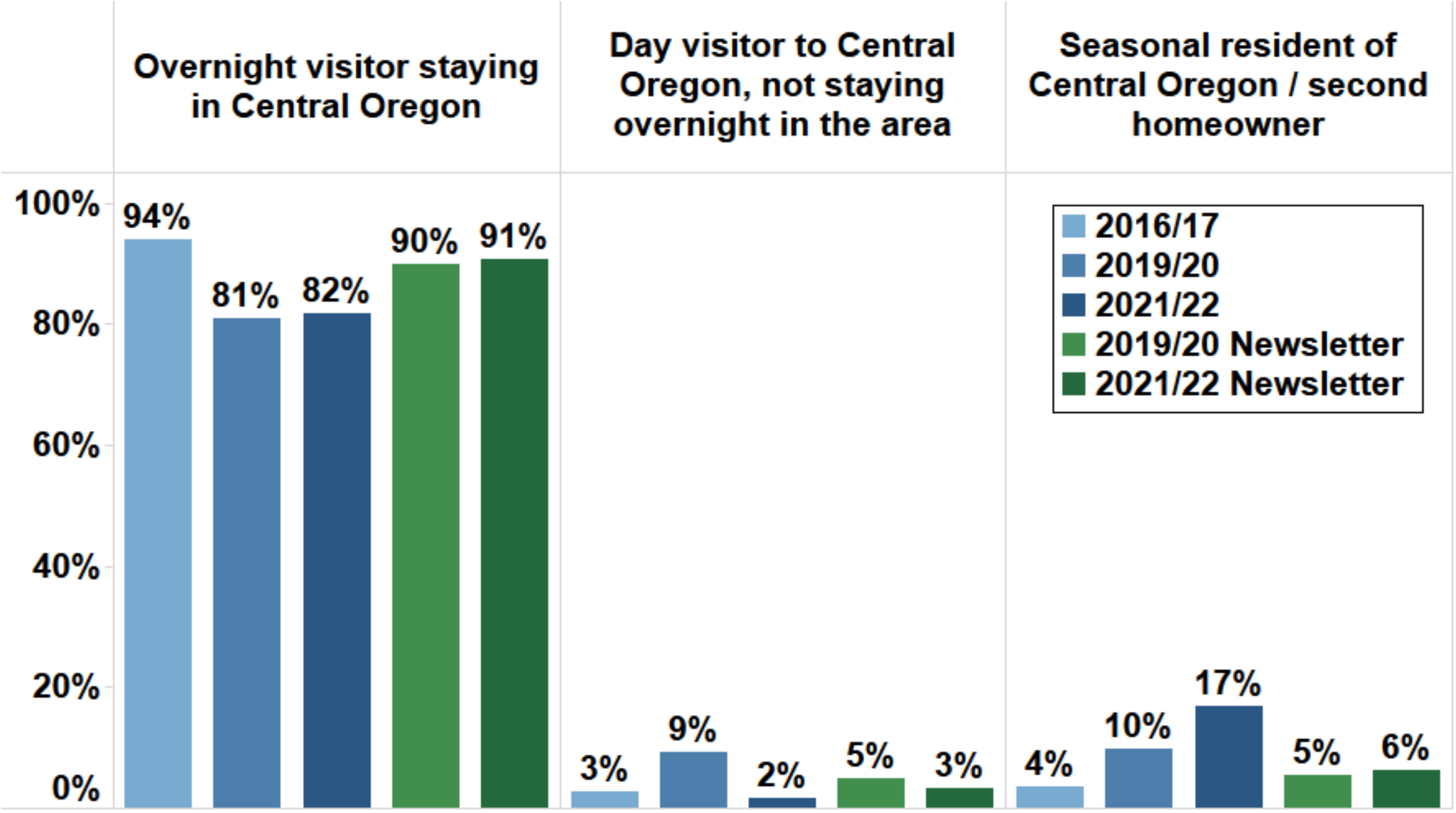
Executive Summary

- **Increased Visitor Spending:** Increased levels of visitor-reported spending for food & drink are consistent with the increased patronization of restaurants and dining out. Visitor spending is also up for lodging and recreation/entertainment/activities. These spending increases are positive for the tourism related businesses in the Central Oregon area.
- **Increased Visiting Locations in Bend Area:** Higher visitation of Downtown Bend, Old Mill, breweries, the Deschutes River Trail, and Sisters were all up compared to two winters ago. Again, the shift in visitor behavior documented in the survey can help to pinpoint where visitors are going during their trip.
- **Geographic Shifts:** Oregon (28%), California (22%), and Washington (20%) are once again the top three states of origin in Winter, comprising a combined 70% of the total share of general respondents and over half (57%) of newsletter respondents.
- **Decline in Oregon Visitors:** However, within both samples, the share of visitors from Oregon decreased compared to 2019/20 – dropping to 28% of general respondents (-11 ppts) and 25% of newsletter respondents (-7 ppts).
- **Net Promoter Score:** The net promoter score for Bend declined to 52 from 61 two winters ago. 64 percent of respondents rated their likelihood to recommend Bend a 9 or 10 out of 10.

Visitor Type / Geography / Occupancy

Visitor Segments

Winter 2016 - 2022



- Overnight visitors staying in Central Oregon continued to represent most respondents (82% in 21/22), with seasonal residents up slightly to 17% of the total. The percentage of day visitors fell to 2% after a spike in 19/20.

- Newsletter respondents stayed consistent year-over-year, with 91% being overnight visitors.

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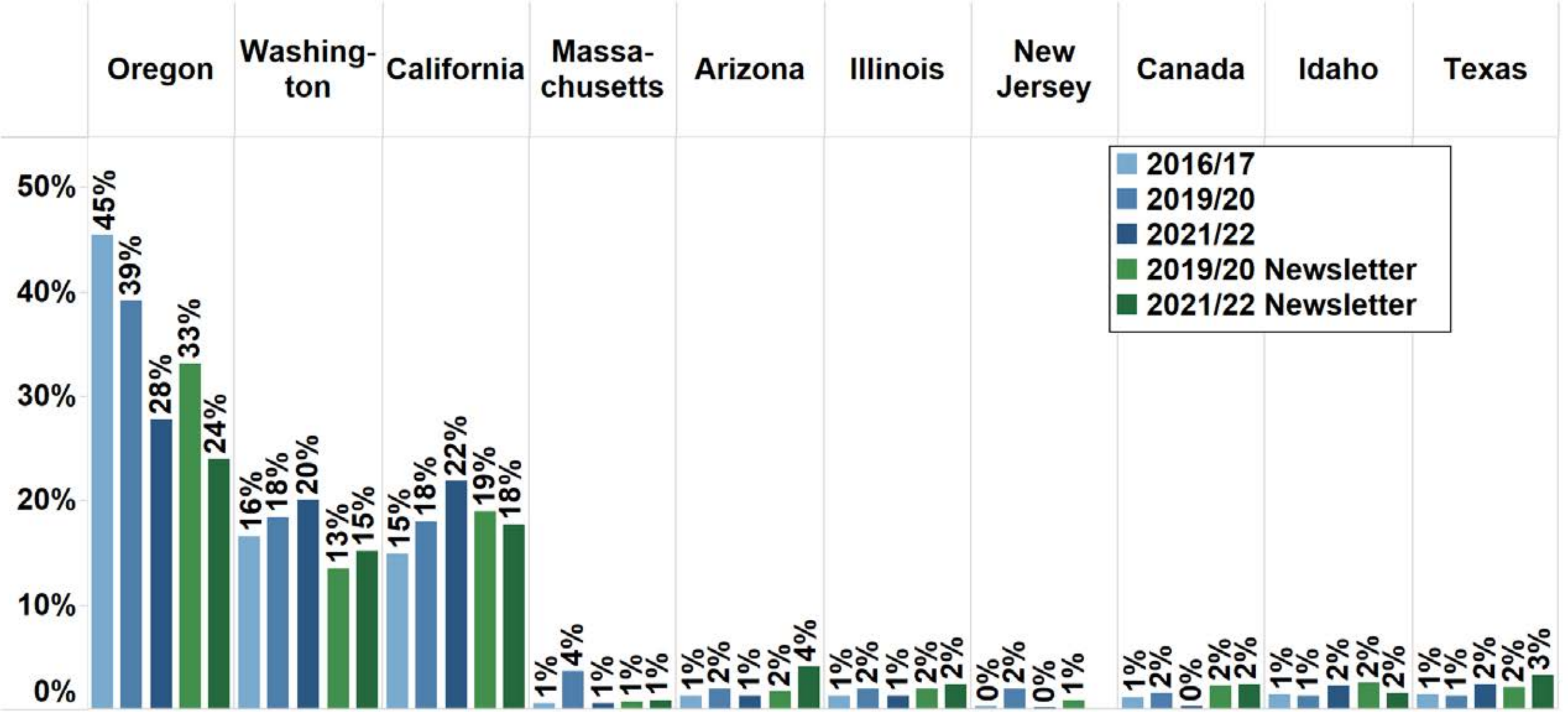
Top 10 State of Origin

Winter 2016 - 2022

- Oregon (28%), California (22%), and Washington (20%) are once again the top three states of origin in Winter, comprising a combined 70% of the total share of general respondents and over half (57%) of newsletter respondents.
- However, within both samples, the share of visitors from Oregon decreased compared to 2019/20 – dropping to 28% of general respondents (-11 ppts) and 25% of newsletter respondents (-7 ppts).
- Idaho and Texas each represented 2% of winter visitors
- A handful of other states each contribute approximately 1% of winter visits, including Massachusetts, Arizona, Illinois, and New Jersey.



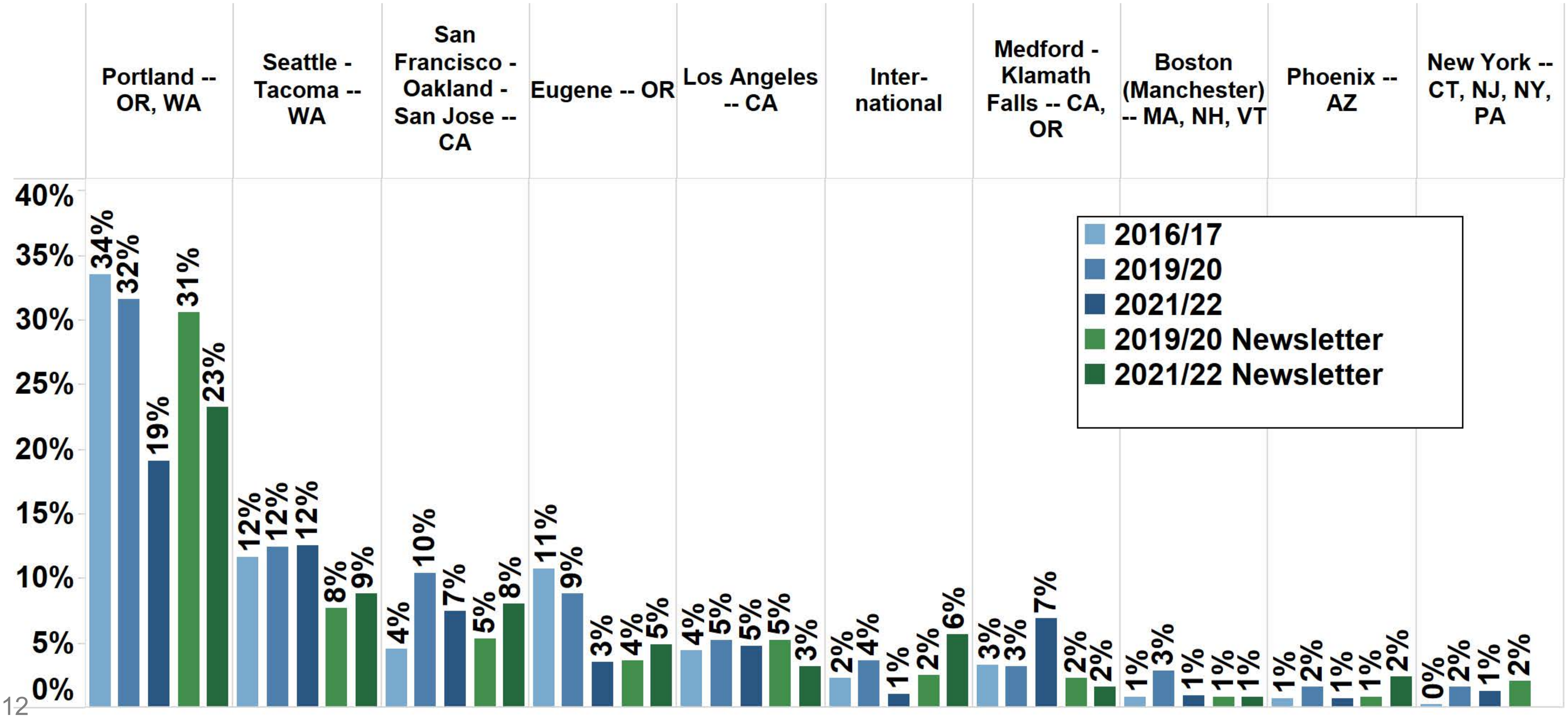
28%

20%

22%

Top 10 DMAs

Winter 2016 - 2022



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Top 10 DMAs

Winter 2016 - 2022

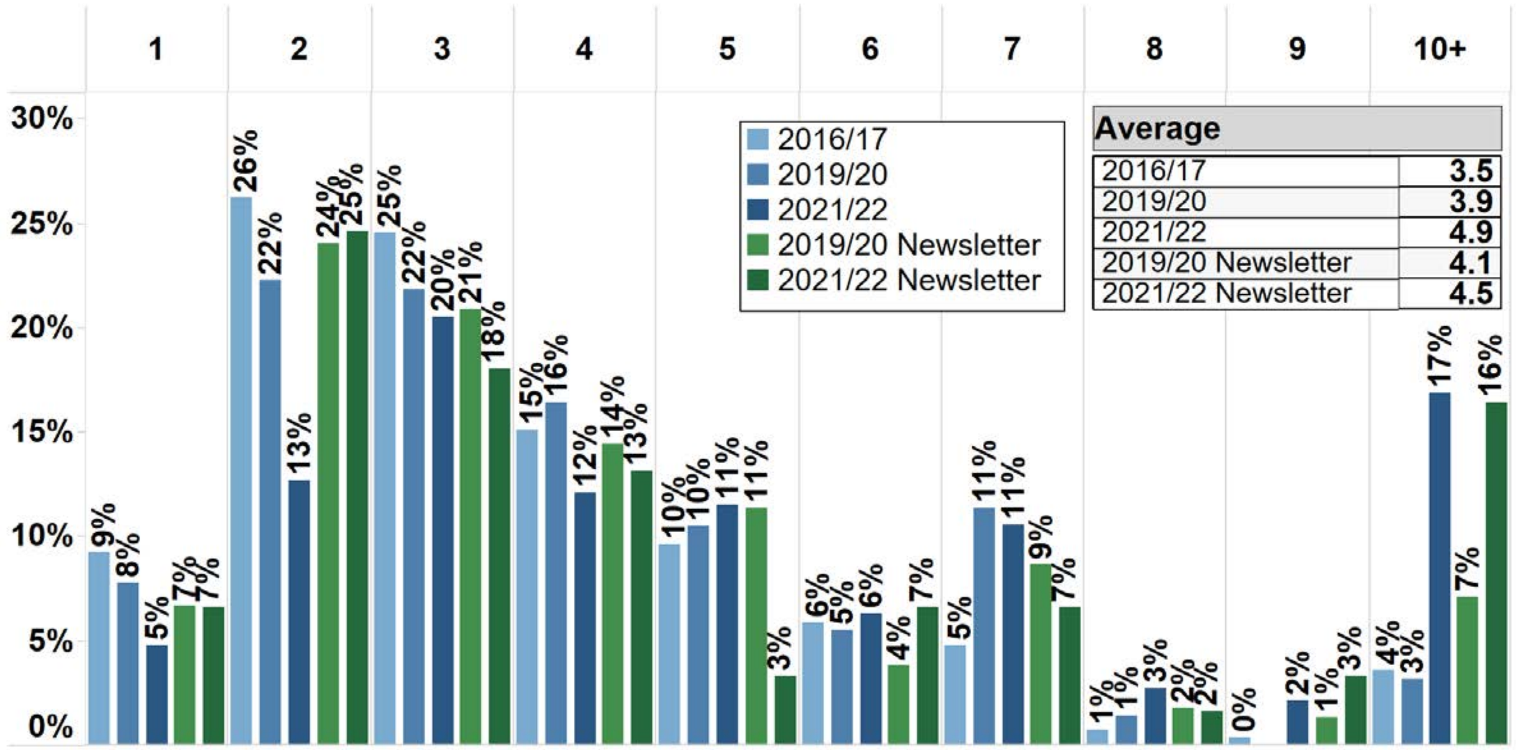
Portland: 19%
Seattle: 12%
San Francisco-Oakland: 7%
Medford-Klamath Falls: 7%

- Among the general sample, the data indicate proportionately less visitation from Portland this past winter (19% vs. 32% in 2019/20) and a steady performance from Seattle (12%).
- San Francisco-Oakland is also down, to 7% from 10% in the winter of 2019/20.
- Medford-Klamath Falls more than doubled to 7% from 3% in 2019/20. The Los Angeles DMA followed at 5% (unchanged). Eugene dropped to 3% of the response from 9% in 2019/20
- Similar trends were seen within the newsletter sample, specifically the drop in the share of visitors from the Portland DMA to 23% (from 31%).

Overnight Guests

Length of Stay in the Bend Area

Winter 2016 - 2022



2021/22 Average

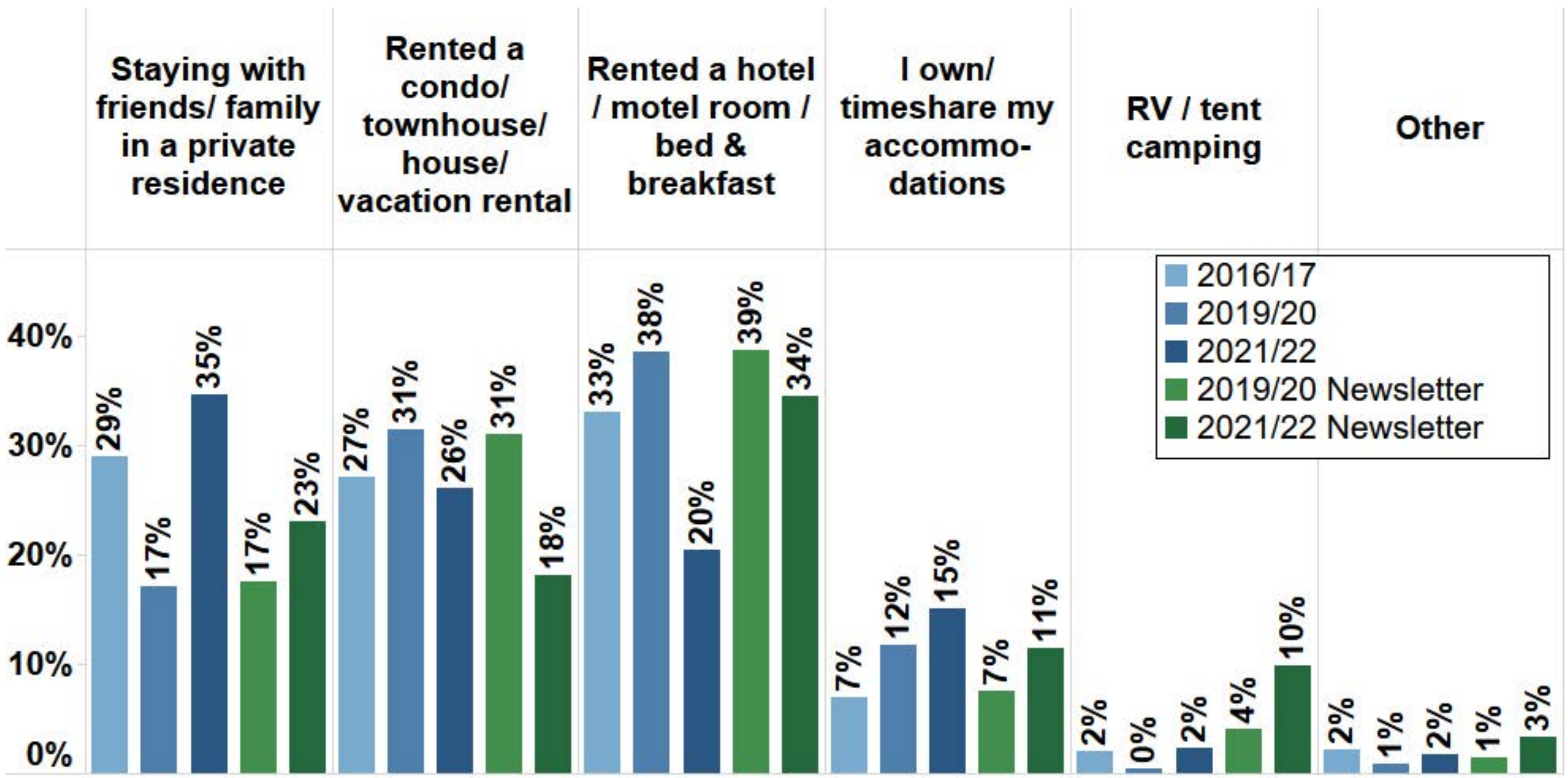
4.9 nights; 4.5 nights

- The average stay among overnight general respondents this winter was 4.9 nights, up from 3.9 nights in 2019/20 and 3.5 nights in 2016/17. The share of guests spending seven or more nights has doubled, with a combined 33% spending at least a week in 2021/22, compared to 15% in both 2019/20 and 2016/17.

- Similarly, average nights increased within the newsletter sample to 4.5 nights, owing to a spike in visitors staying 10+ nights in the area (+9 ppts to 16%).

Accommodation Type

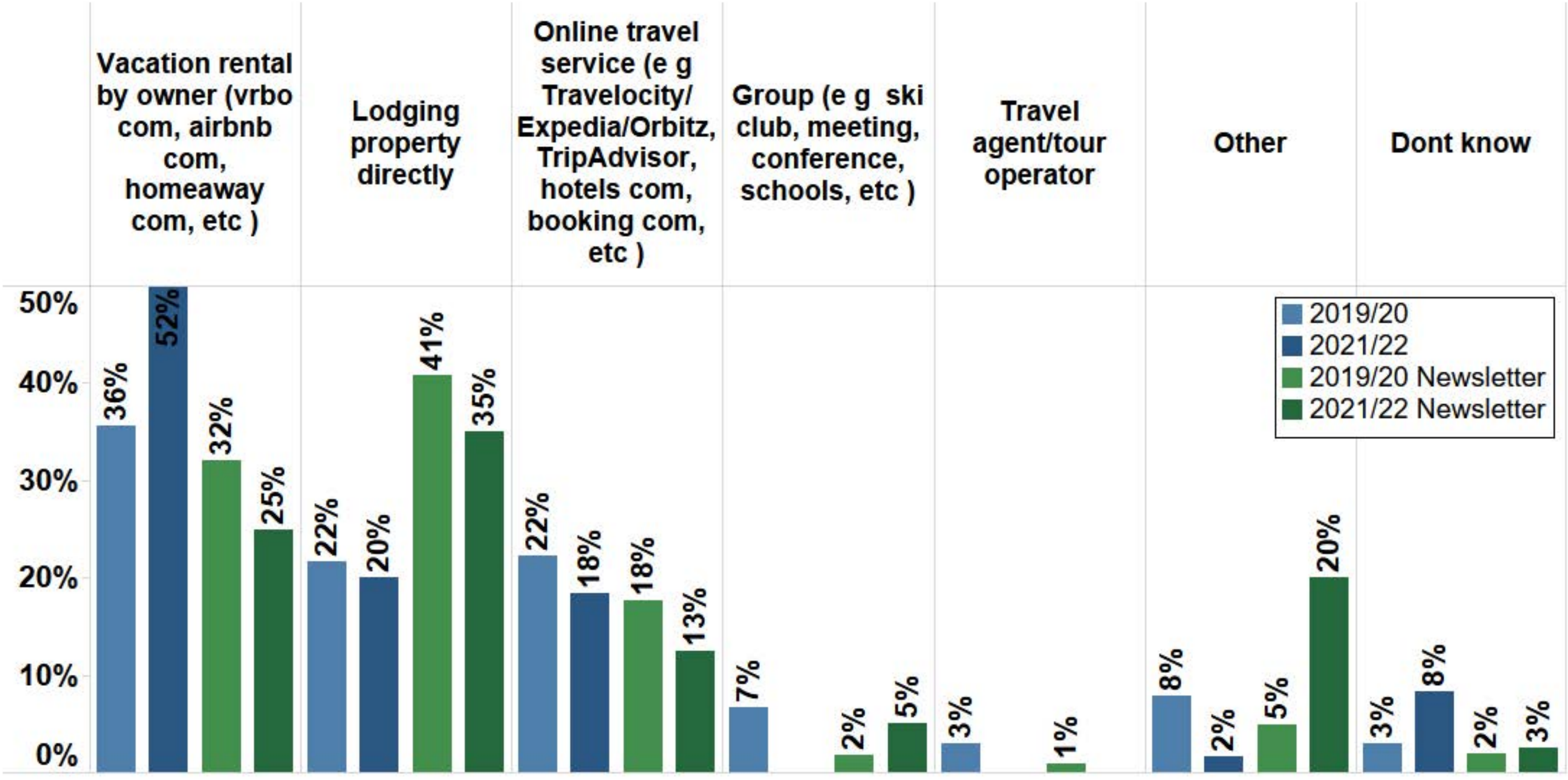
Winter 2016 - 2022



- This winter, the share of visitors staying with family and friends rose to 35% vs. 17% in 2019/20.
- Relatedly, fewer visitors reported staying in a condo/vacation rental—26%, dropping from 31% last year. Similarly, the proportion staying in hotels/motels dropped to 20% from 38% in 2019/20.
- Overall, similar trends were seen within newsletter respondents, with more using owned residences or personal connections over rented accommodations.

Lodging Reservations Booking Method

Winter 2019 - 2022



- General visitors were most likely to book through a “rental by owner” site (such as vrbo.com, Airbnb.com, homeaway.com, etc.—52%, up from 36%), with another 20% booking directly with the lodging property in 2021/22. Reservations through online travel services (such as Travelocity, Expedia, Orbitz, etc.) were also common with 18% of the response, a decrease from 22% in the 2019/20 season

- The largest shares of newsletter respondents booked either through the lodging property directly (35%) or with VRBO sites (25%). However, both methods fell this season, with a corresponding increase in “other” methods of booking lodging.

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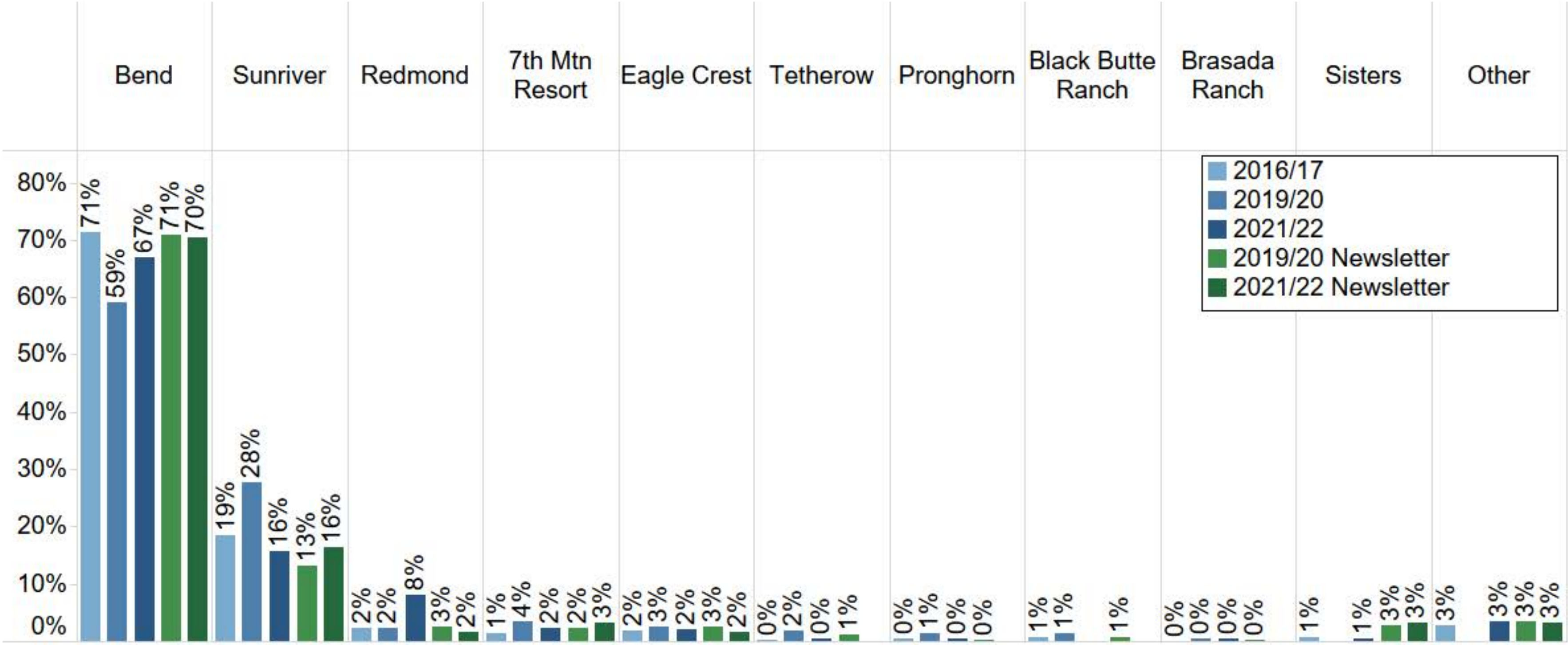
Accommodations Location

Winter 2016 - 2022



67%

16%

Bend remains the primary accommodation location among both samples during the winter season (67%; 70%), while Sunriver has decreased in the past year within the general sample (16% in 2021/22 and 28% in 2019/20). Redmond increased in the general sample to 8% from 2% in 2019/20.

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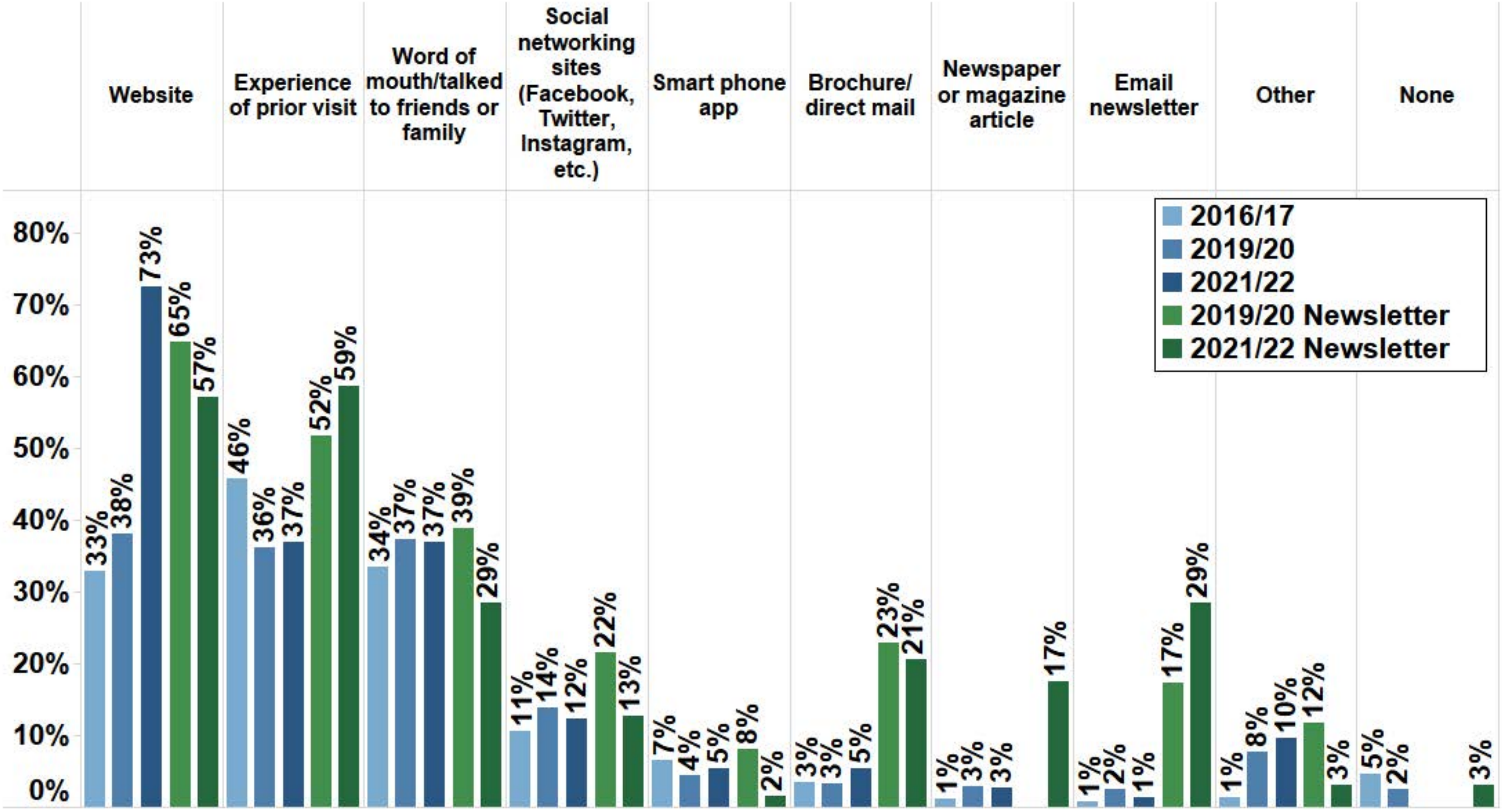
Trip Characteristics / Travel Planning

Trip Planning: Information sources

Winter 2016 - 2022

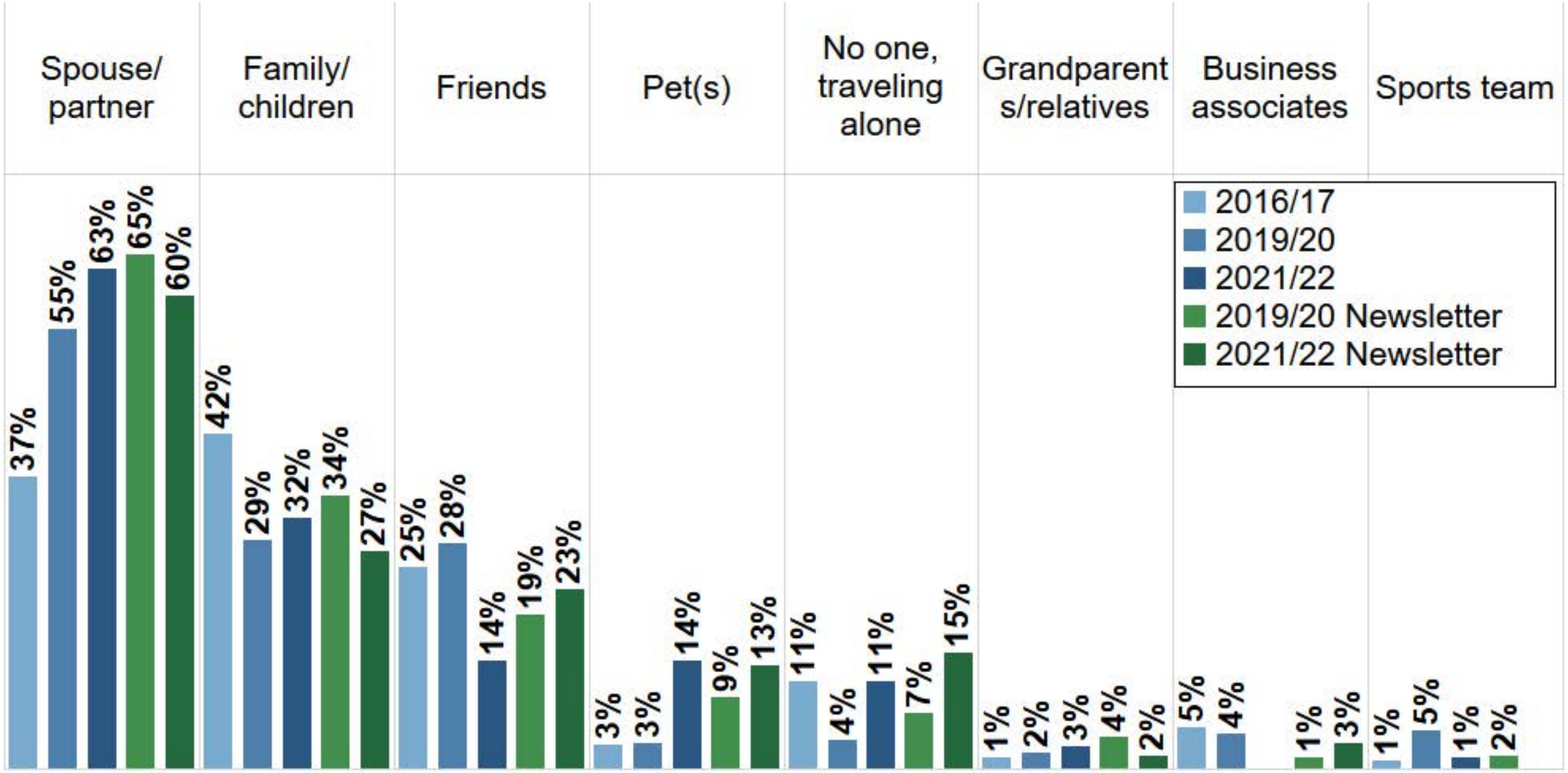


- Within the general sample, the top three sources of trip planning information in 2021/22 were the Visit Bend website (73%—up from 38% in 2019/20), experience of a prior visit (37%), and word of mouth (37%). In part, some of the increase in use of digital information sources may be attributed to the nature of the research data collection this past winter.

- Newsletter respondents were more likely to use more traditional information sources like the email newsletter (29%), a brochure or direct mail (21%), or a newspaper or magazine article (17%).

Travel Party Composition

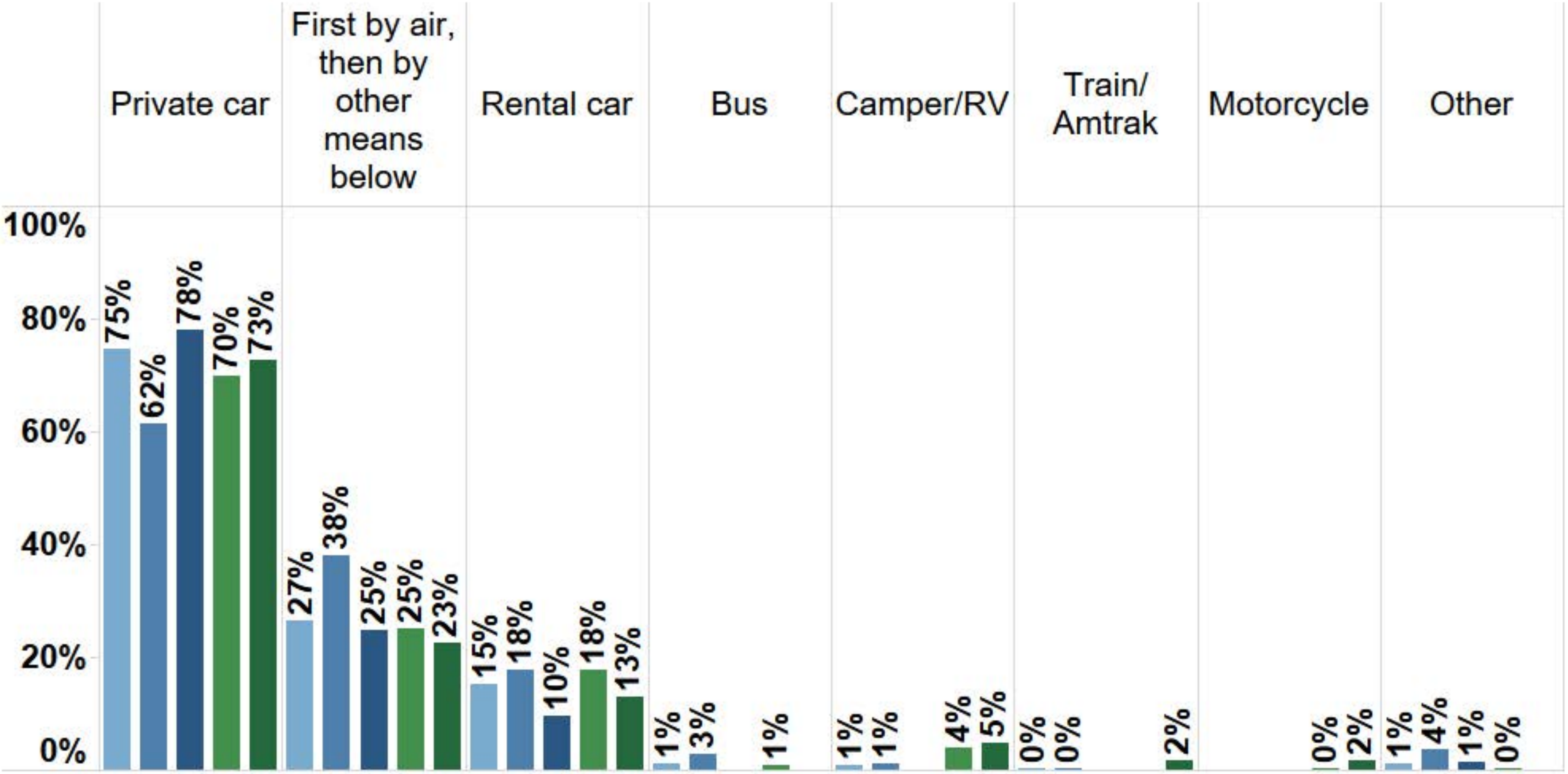
Winter 2016 - 2022



- Among both samples, those traveling as couples remained dominant in 2021/22 at 63% general respondents and 60% newsletter respondents. However, traveling with friends decreased in this winter's sample (14% vs. 28%) within the general sample.

Mode of Transportation

Winter 2016 - 2022



- For both samples in winter 2021/22, guests were again most likely to drive their private vehicle (78%; 73%), flying (25%; 23%) or to be using a rental car (10%; 13%).
- Flier shares in both samples decreased this winter, more dramatically so within the general sample (-13 ppts to 25%).

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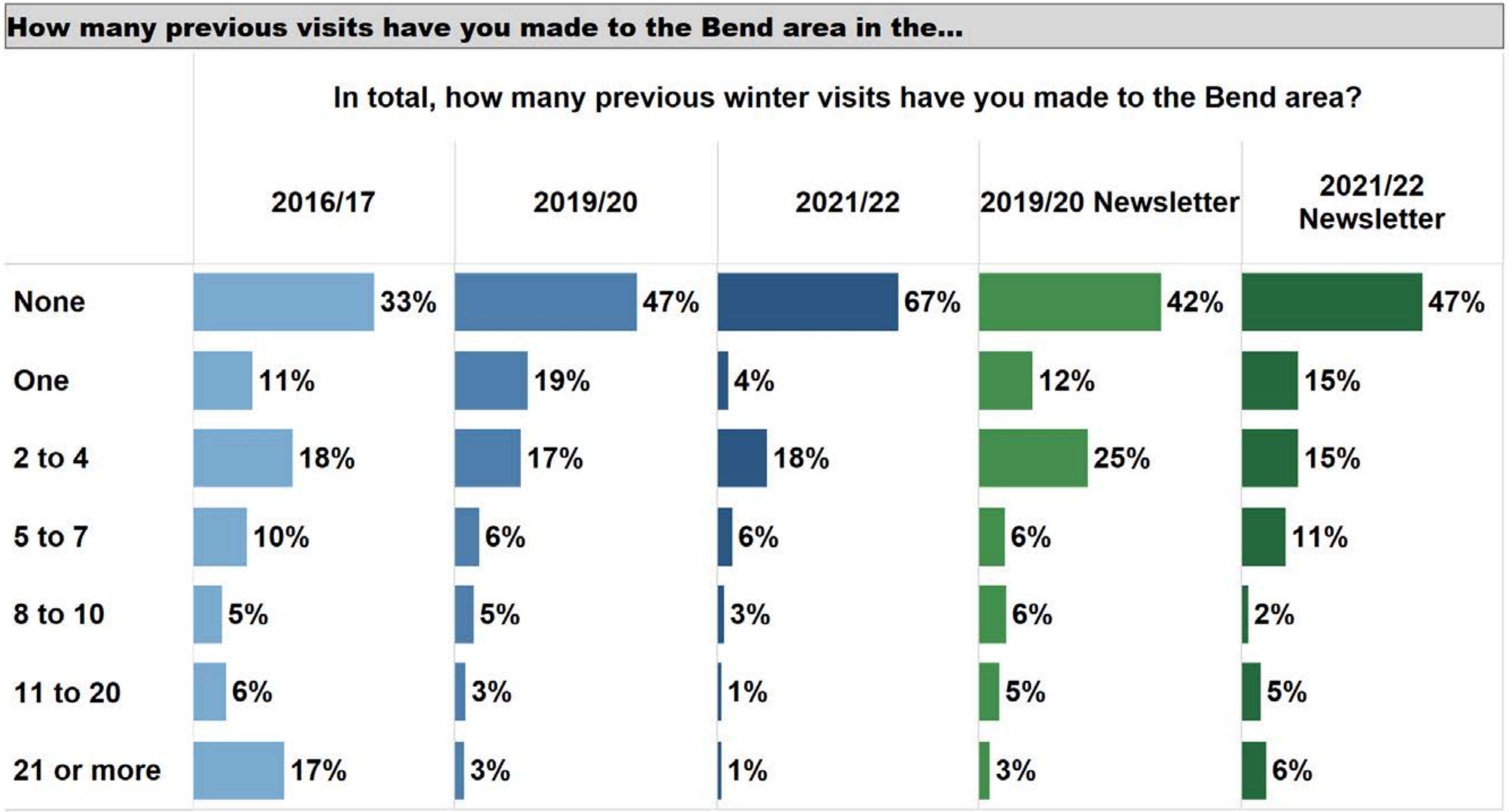
Previous Winter Visits to the Bend Area

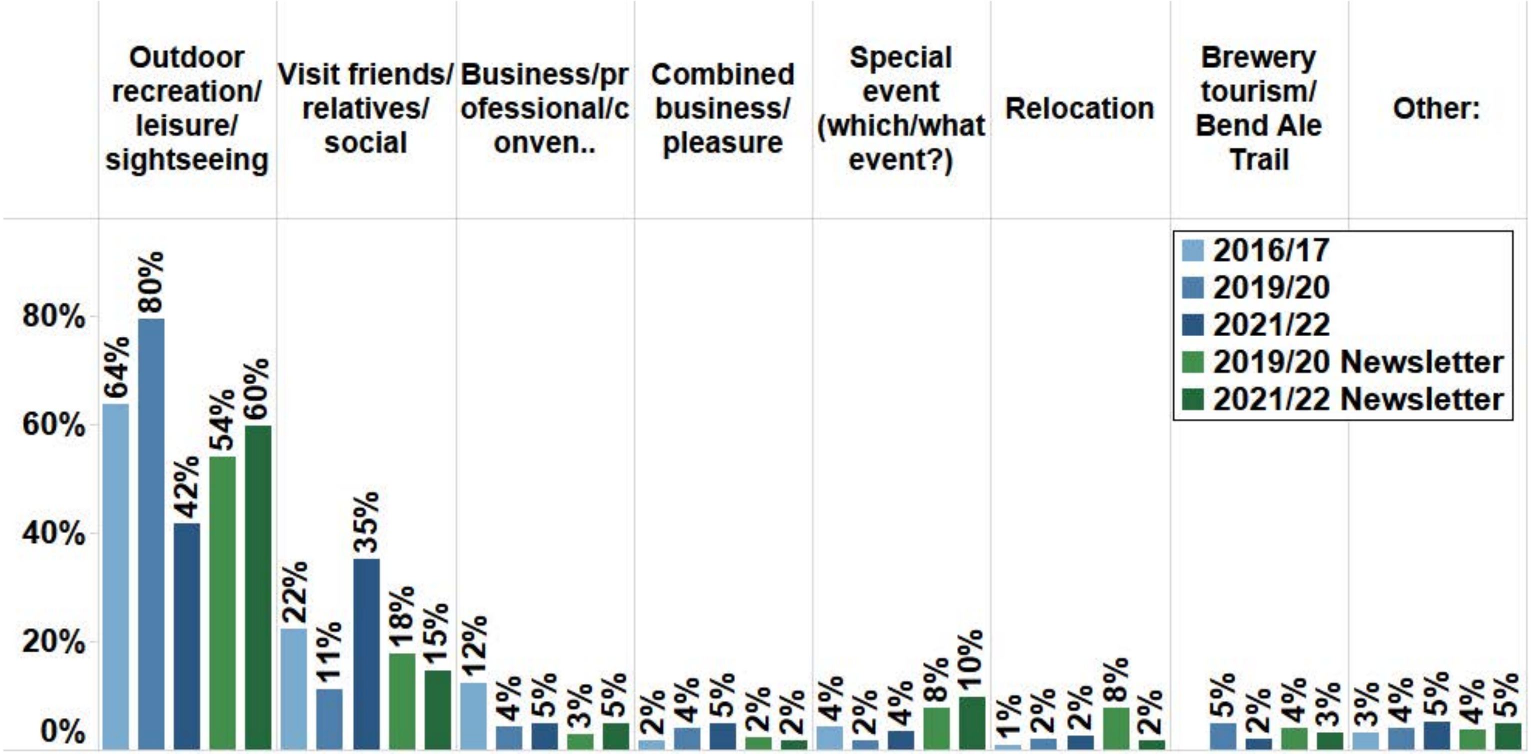
Winter 2016 - 2022

- Among both samples, this winter was much more likely to be first-time visitors to Bend at 67% (vs. 33-47% in 2016/17 and 2019/20). Similarly, first-time newsletter respondents increased from 42% to 47%.



Main Purpose of Trip

Winter 2016 - 2022



- Winter visitors are still primarily drawn by outdoor recreation, leisure, and sightseeing (42%; 60%), followed by visiting friends/family (35%; 15%). Special events, Business and combined business/pleasure all slightly increased (4%, 5%, 5%, respectively).
- Despite its continued prominence, fewer general respondents were visiting for outdoor recreation as their primary purpose (42%; -38 ppts) whereas a much larger share were visiting friends and relatives (35%; +24 ppts).

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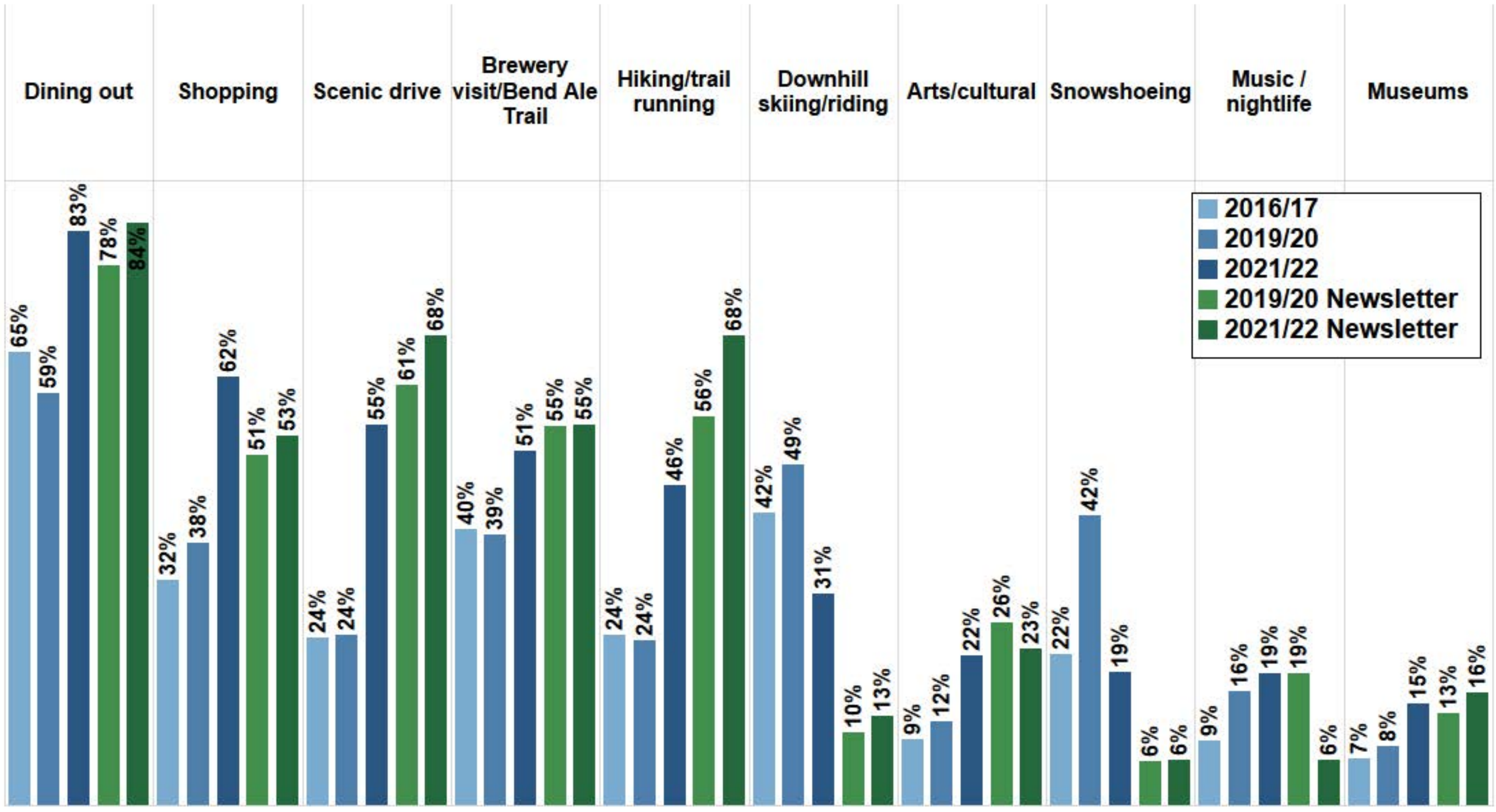
Activity Participation

Winter 2016 – 2022 (Top 10 activities shown)



- Dining is again the most common activity during the winter season (83%; 84%) in both samples. In the general sample this is followed by shopping (62%—growing from 38% in 2019/20), scenic drives (55%), and brewery visits (51%). Hiking (46%) and downhill skiing (31% - down from 49% in 2019/20) are also popular activities in the winter season.

- Newsletter respondents were more apt to hike (68%), but less apt to downhill ski/ride (23%) than their general counterparts.

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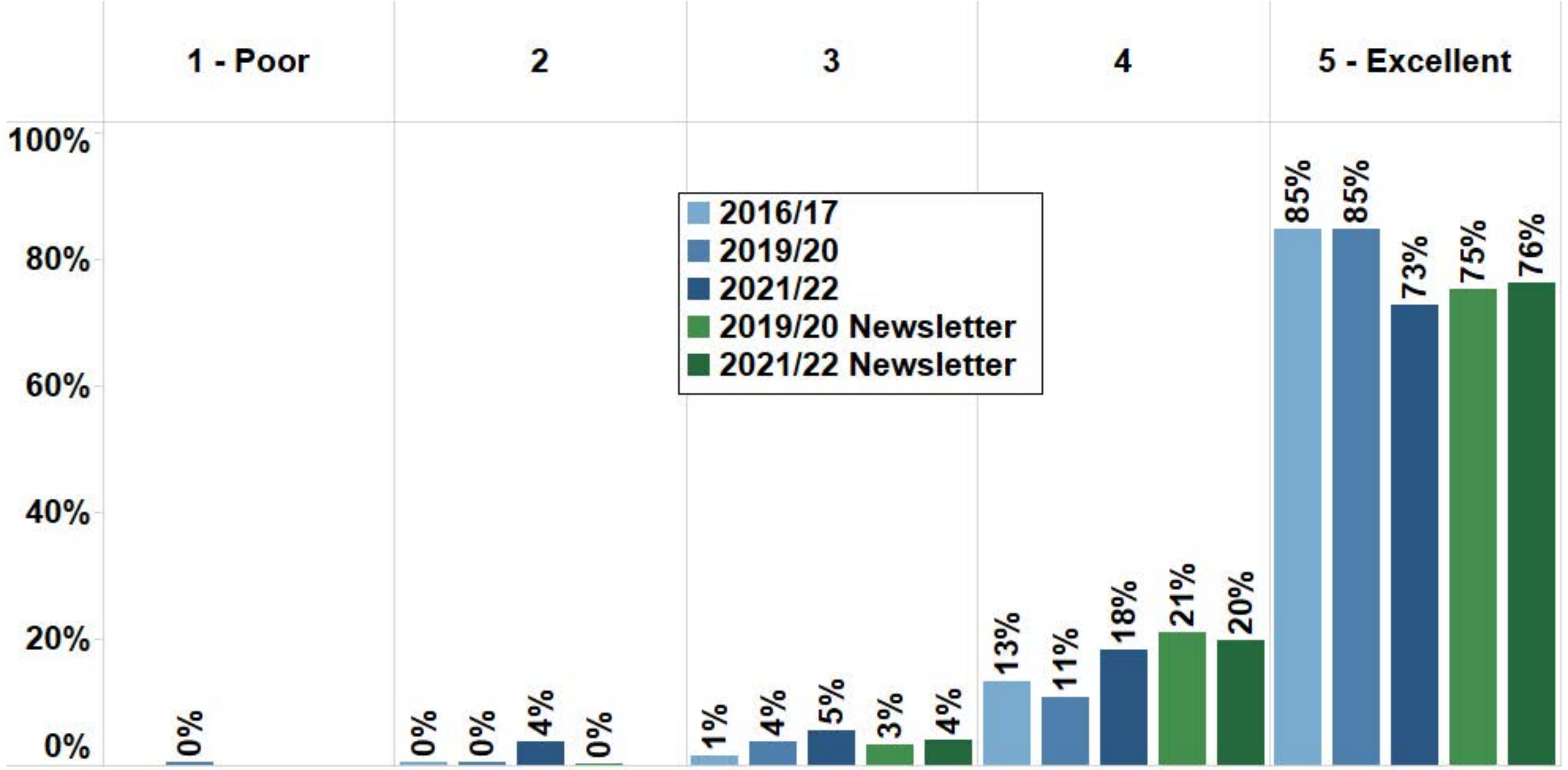
Satisfaction with Recreation Experience

Winter 2016 - 2022

- Bend visitors (within both samples) continue to be extremely satisfied with their recreation experience. Approximately 91% of general visitors in 2021/22 rated their satisfaction either a 4 or 5 on a scale of 1 to 5. 96% of newsletter respondents gave a rating of either a 4 or 5.



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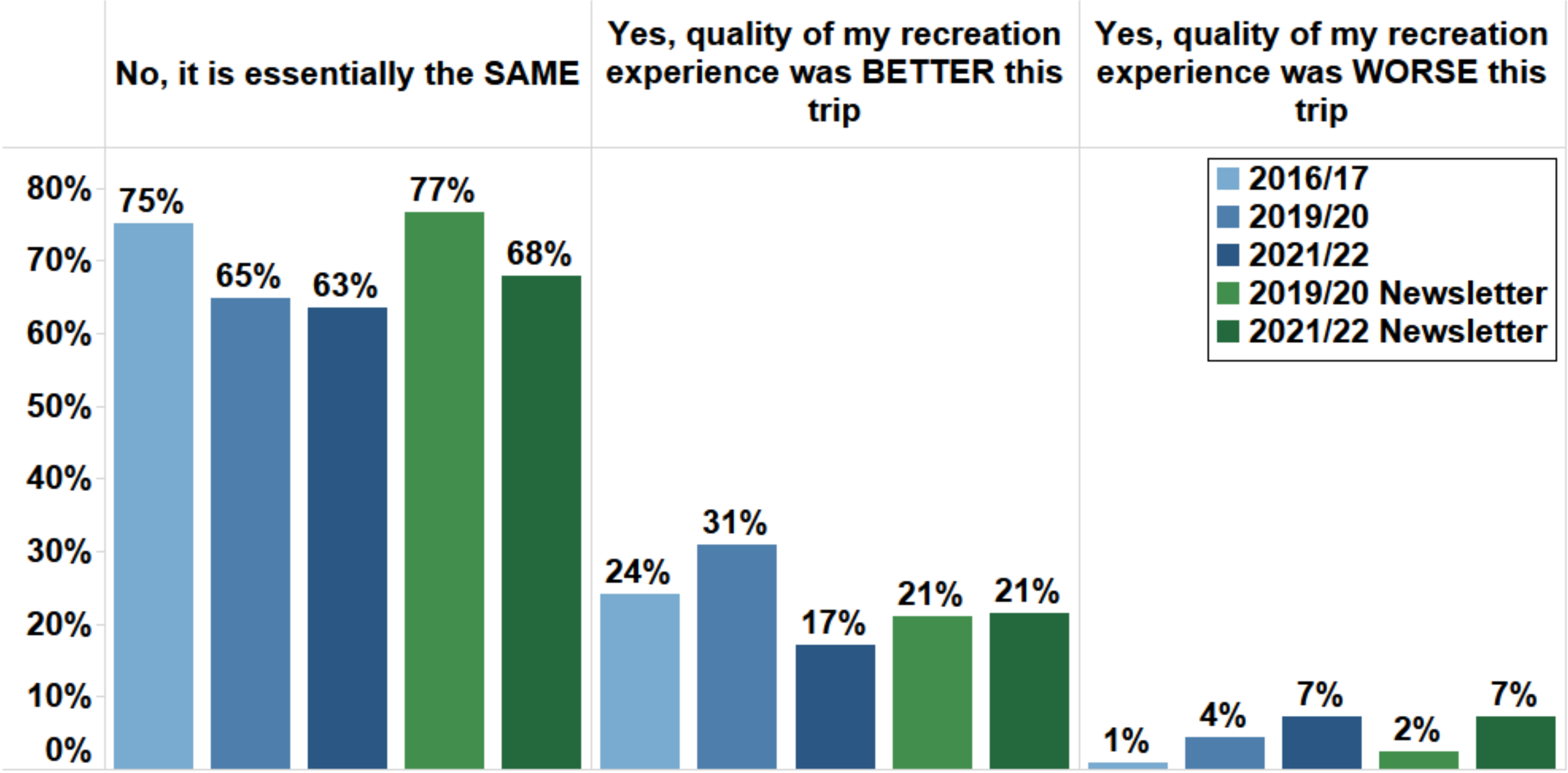
Quality of Recreation Experience

Winter 2016 – 2022

- This winter, 63%-68% of visitors said the quality of their recreation experience was essentially the same this trip as their last visit, with 17% of general visitors saying it was better, down from 31% in 2019/20. 7% of visitors stated their experience was worse, up from 4% in 2019/20.
- Similarly, slightly more newsletter respondents reported their experience was worse this season (7%, up from 2%).



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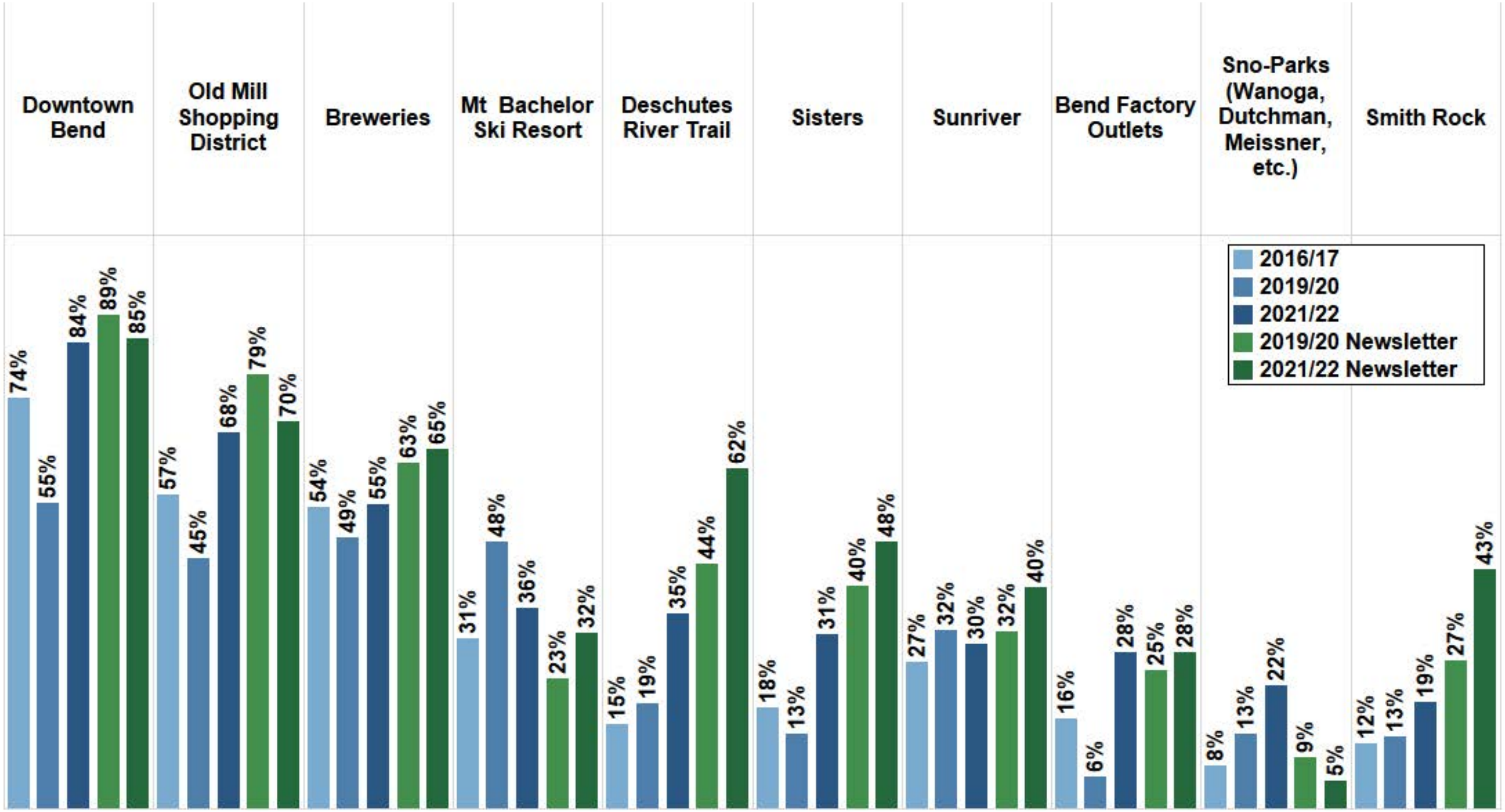
Attractions Visited

Winter 2016 – 2022 (Top 10 attractions shown)

- Visitors in both samples were most apt to visit Downtown Bend (84%; 85%), the Old Mill District (68%; 70%), and breweries (55%; 65%).
- Within the general sample, other areas such as the Deschutes River Trail, Sisters, Bend Factory Outlets, Sno-Parks, and Smith Rock all had increased visitation compared to last winter. Conversely, Mt. Bachelor and Sunriver had a slight decrease in visitation.
- Compared to general respondents, newsletter respondents frequented Breweries (65%), the Deschutes Trail (62%), Sisters (48%), and Smith Rock (43%) more often.



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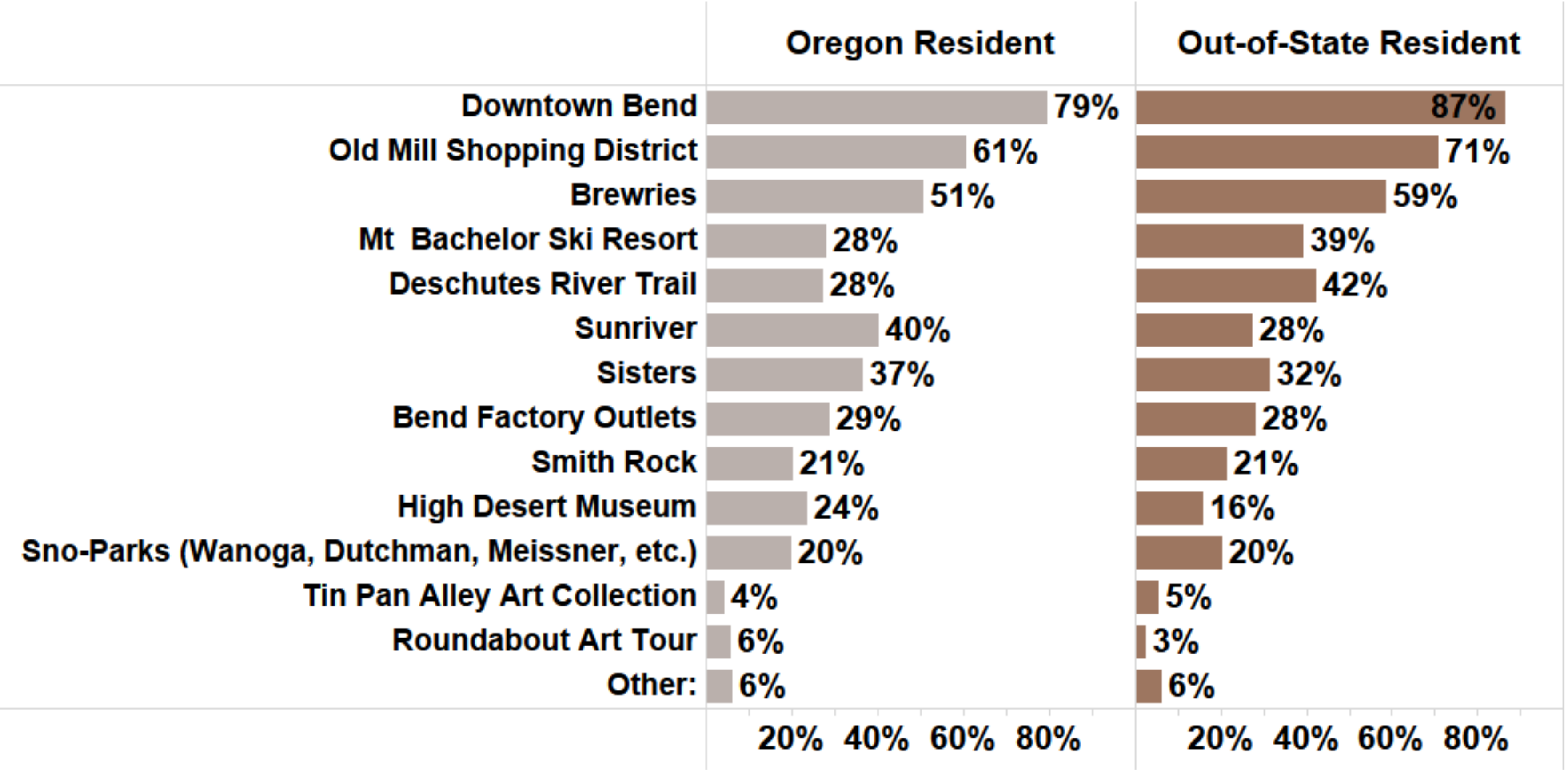
Attractions Visited

By Location of Residence

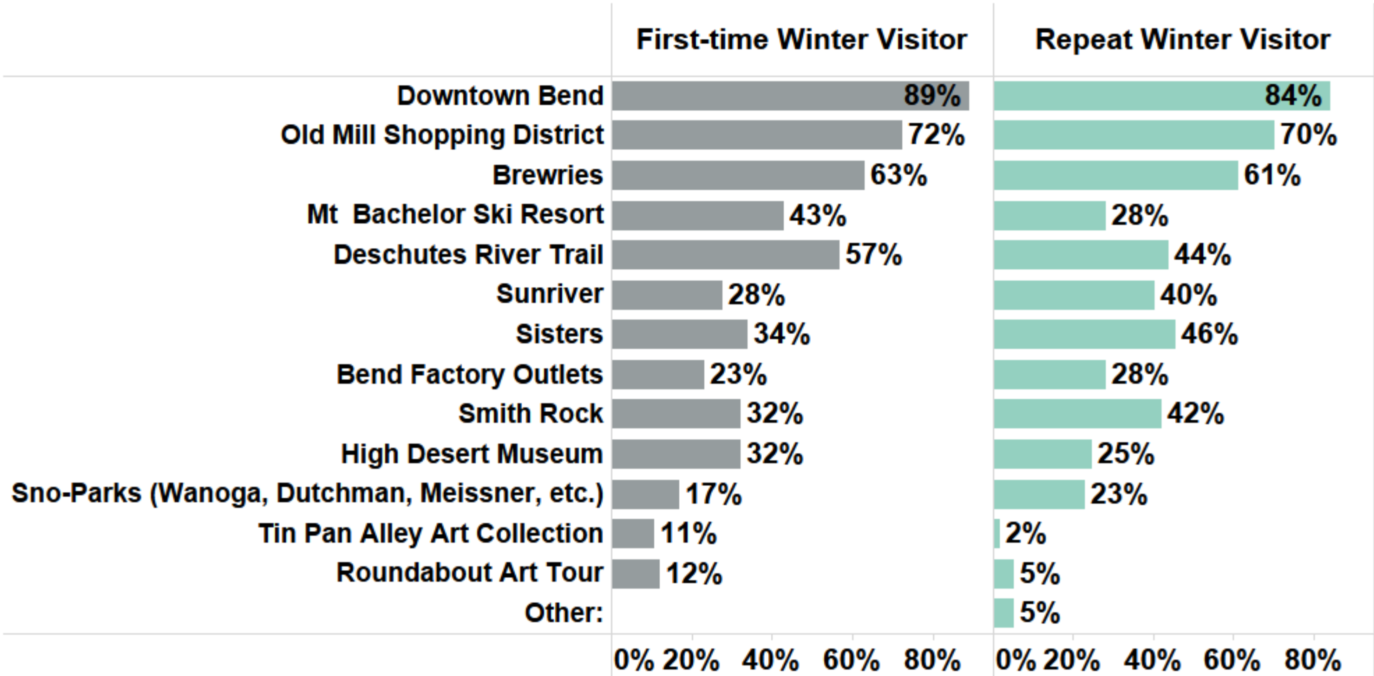
- Oregon residents are generally less likely to visit the variety of attractions than out-of-state residents do, likely due to shorter stays. However, the sorted distributions for each resident type is similar.

- More out-of-state residents visited Downtown Bend (87%) and the Old Mill Shopping District (71%) whereas more Oregon residents visited Sunriver (40%) and Sisters (37%).



Attractions Visited

By First-time vs. Repeat Visitors



#1

#2

#3

First-time and repeat respondents tended to visited very similar locations this winter, particularly Downtown Bend, Old Mill Shopping District, and Breweries. However, First-timers tended to visit Mt. Bachelor (43%) at higher rates, whereas larger shares of Repeat respondents visited Sisters (46%) and Smith Rock (42%).

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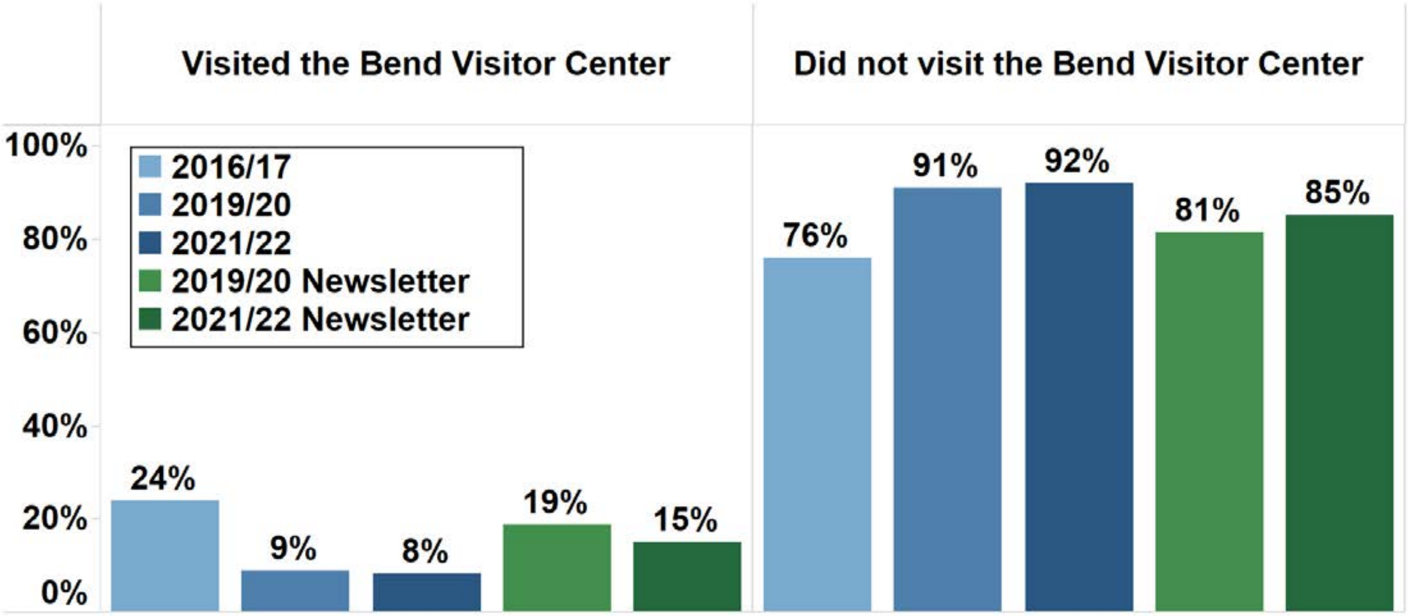
Bend Visitor Center

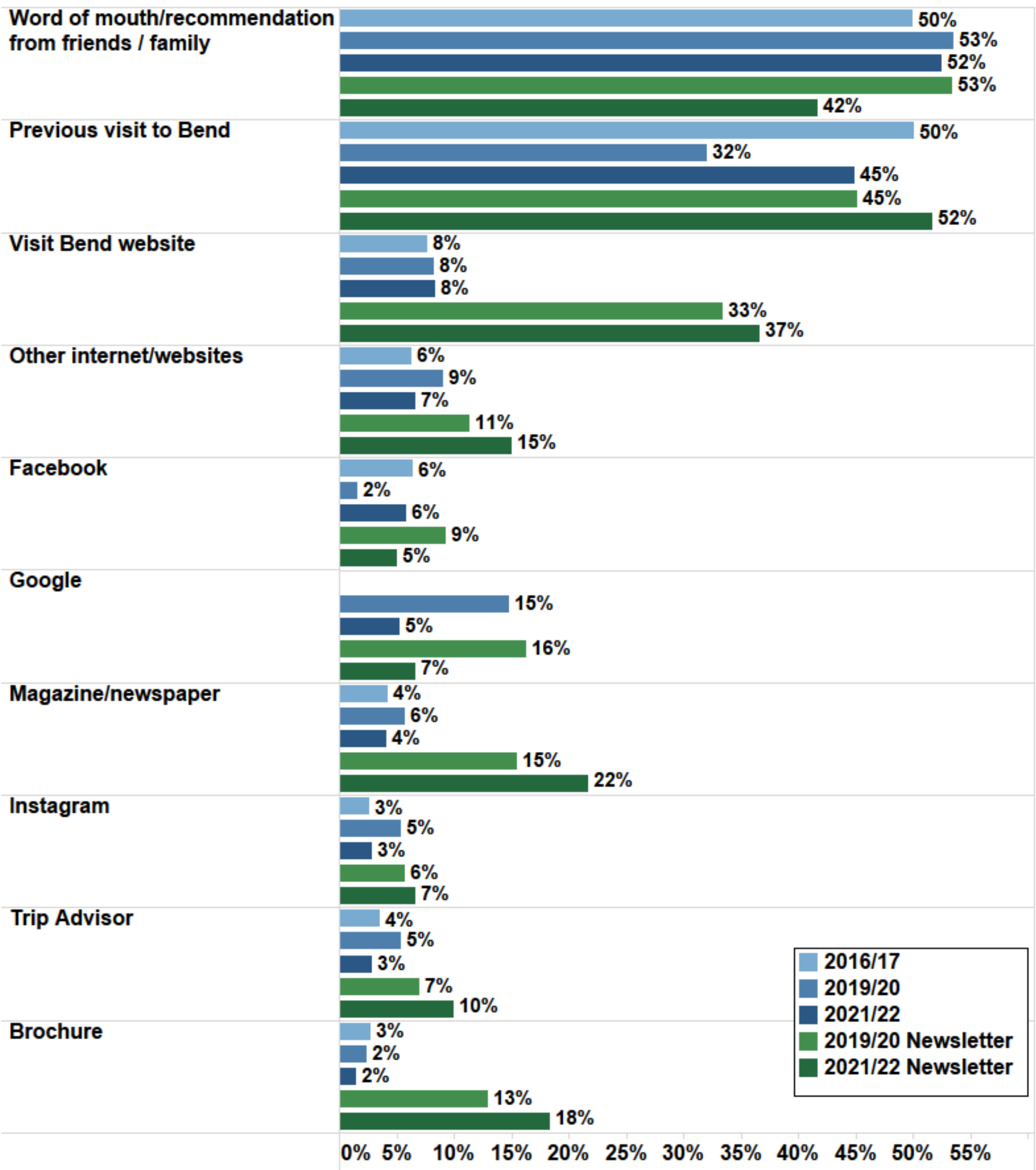
Winter 2016 - 2022



Winter visitors within both samples are rather consistent in their visitation to the Bend Visitor Center in the past few years. Since 2019/20, 8% to 9% of visitors went to the Bend Visitor Center, down from 24% in 2016/17. The Bend Ale Trail is clearly one draw to the Center but Visit Bend could continue to look for additional ways to engage visitors to enhance their experience.

How did you hear about Bend?

Winter 2016 - 2022



52%

Word of mouth

45%

Previous visit

- Word of mouth continues to be the primary method of how general visitors first hear about Bend (52%), followed by previous visits to Bend (45%) and the Visit Bend website (8%).
- Among newsletter respondents compared to 19/20, fewer were driven by word of mouth (42%) whereas more were driven by previous visits (52%).
- Clearly, generating positive PR is essential, as word of mouth recommendations are very important.

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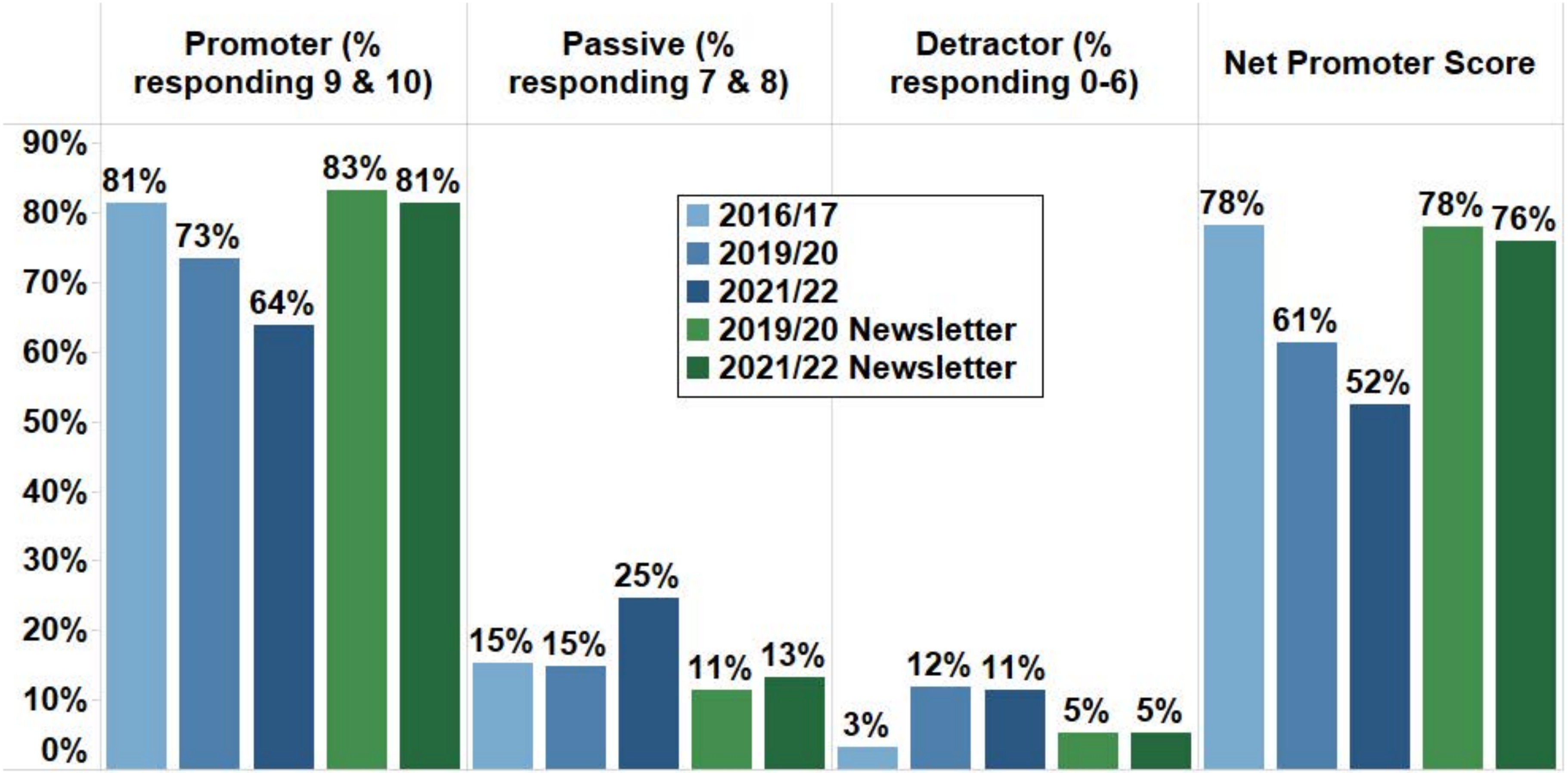
Likelihood to Recommend & Net Promoter Score (NPS)

Winter 2016 - 2022

- Likelihood to recommend declined slightly among newsletter visitors (76% NPS). However, it has decreased within the general sample to a score of 52% in 2021/22 (-9 ppts from 19/20). This is largely driven by an increase in Passives this season (25%, +10 ppt from 19/20).

- Of note, the drop in NPS from 16/17 is driven heavily by methodology, as intercept surveys tend to generate more favorable responses than online surveys, on average.



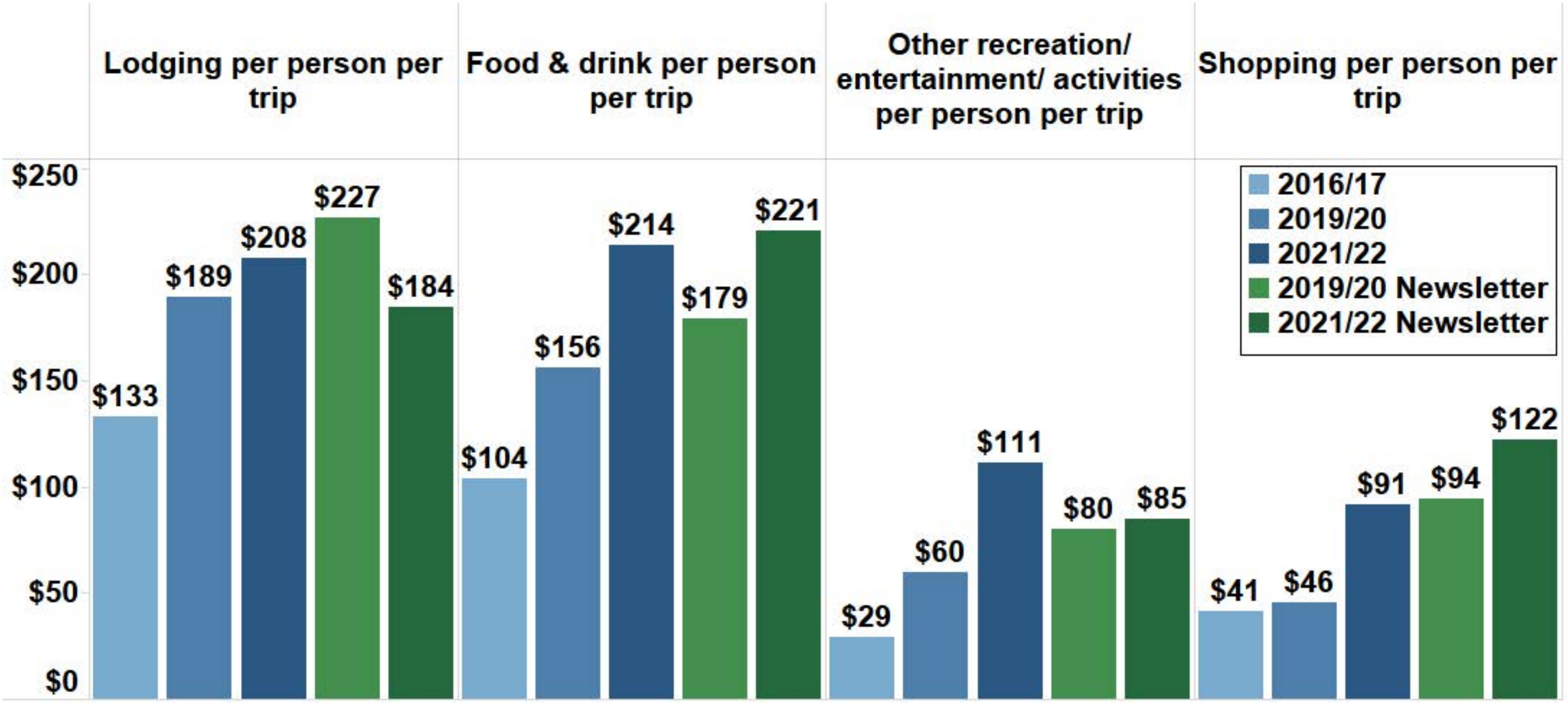
Trip Expenditures

Trip Expenditures

Winter 2016 – 2022: Average Spend per Person per Trip

- Within general respondents, trip expenditures increased across the board, compared to historical results. This was particularly true within food/drink costs (which increased from $156 to $214) and general recreational costs (which increased from $179 to $221).

- Expenditures within the newsletter sample were relatively more stable in their fluctuations. Lodging expenditures decreased approximately $40 (to $184) compared to the previous winter's sample.



*Lift tickets and snowsports expenditures also increased slightly within the website sample, from $106 to $119. This spending category was not included on the newsletter survey.

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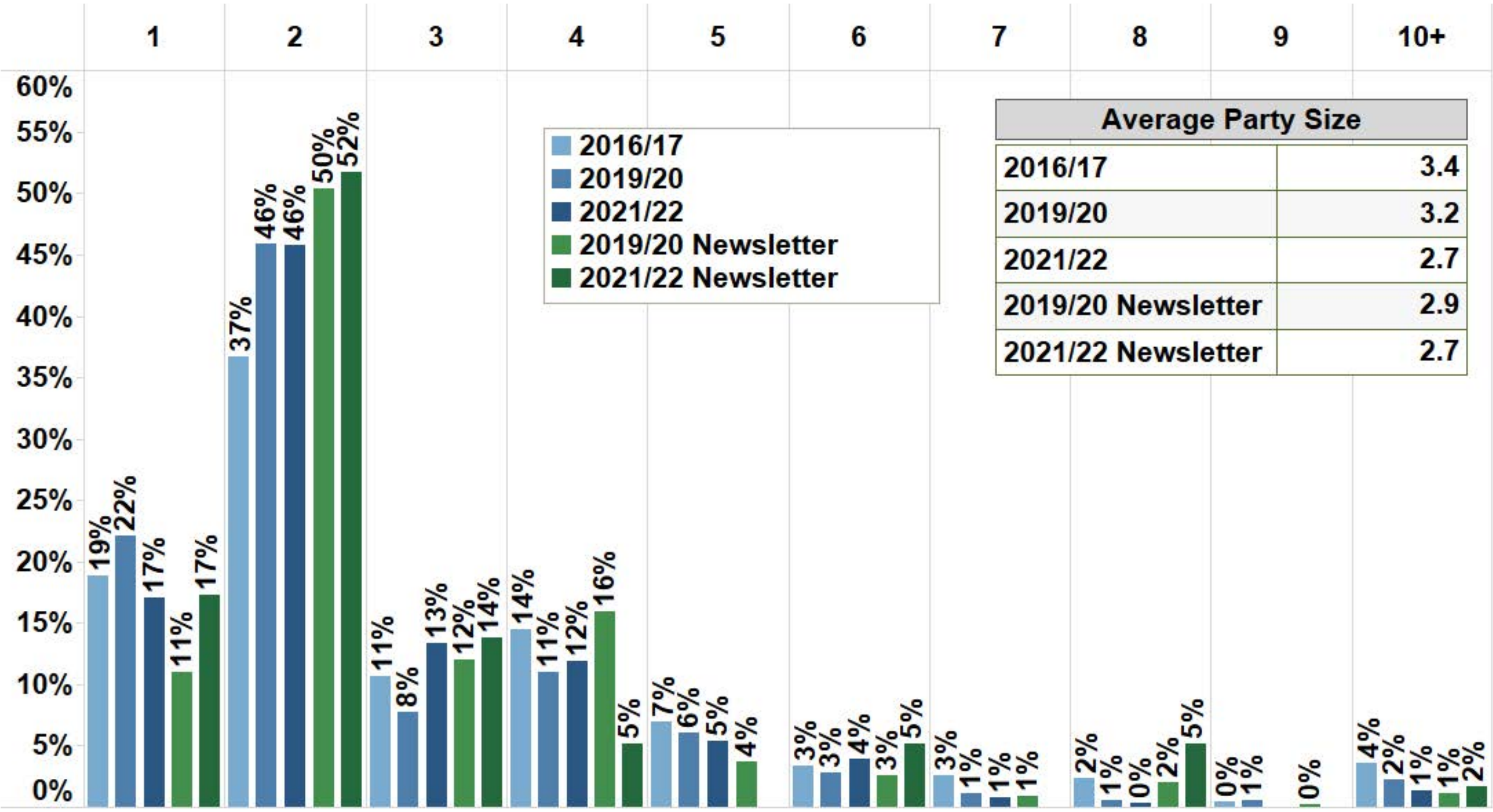
Travel Party Size

Winter 2016 - 2022



Average Party Size	
2016/17	3.4
2019/20	3.2
2021/22	2.7
2019/20 Newsletter	2.9
2021/22 Newsletter	2.7

- Travel party size decreased slightly within both samples, with 2.7 people, on average, within both samples.
- Travel party size is down from historic averages
- Parties of two are most common at 46% and 52% for newsletter respondents.

2021/22 Winter Average party size: 2.7 people

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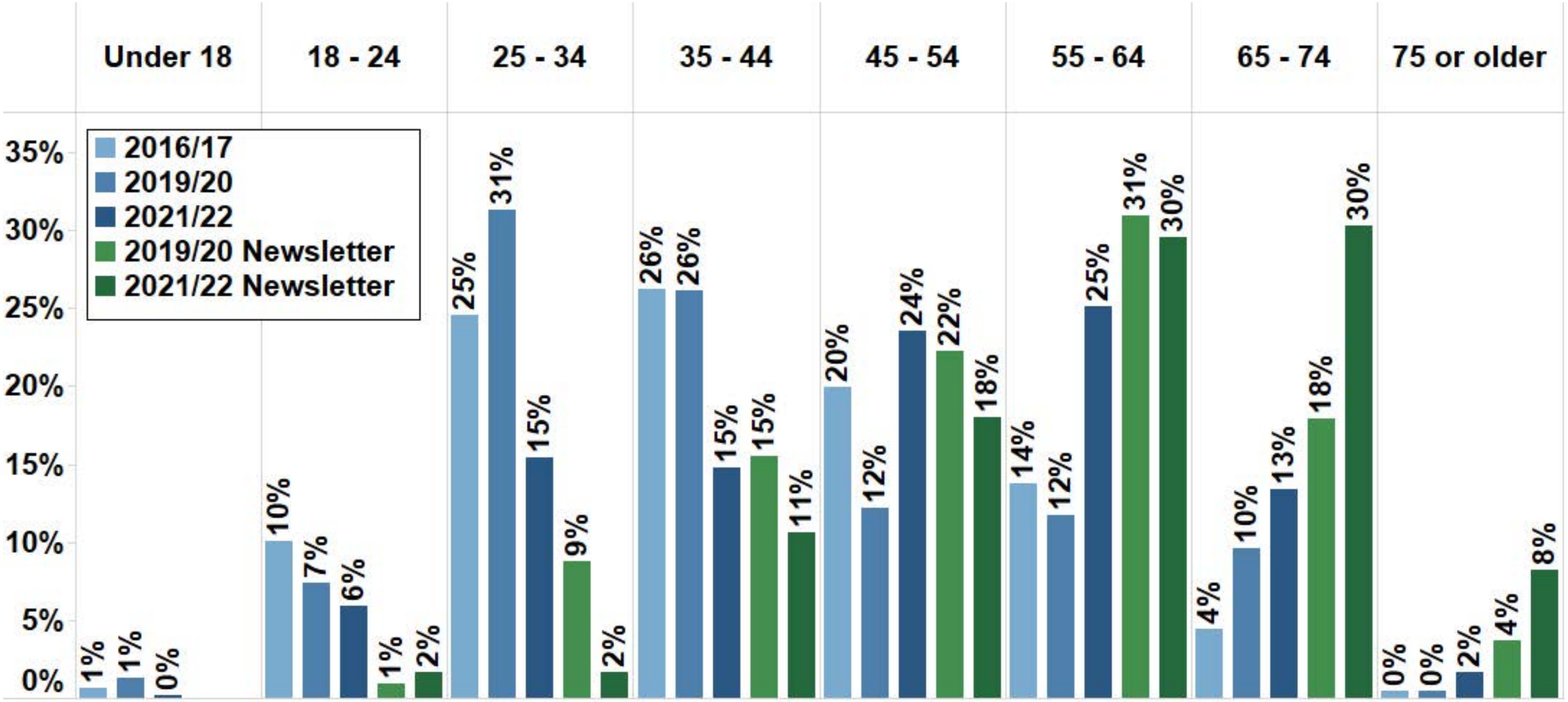
Guest Demographics

Visitor Age Profile

Winter 2016 – 2022



25-34 15%

35-44 15%

45-54 24%

55-64 25%

Winter visitors in both samples were somewhat older in 2021/22, with a combined 64% (general) and 86% (newsletter) being at least 45 years or older. This age increase is owned partially to decreases in shares of visitors aged 25-34 and 35-44 this season within both samples.

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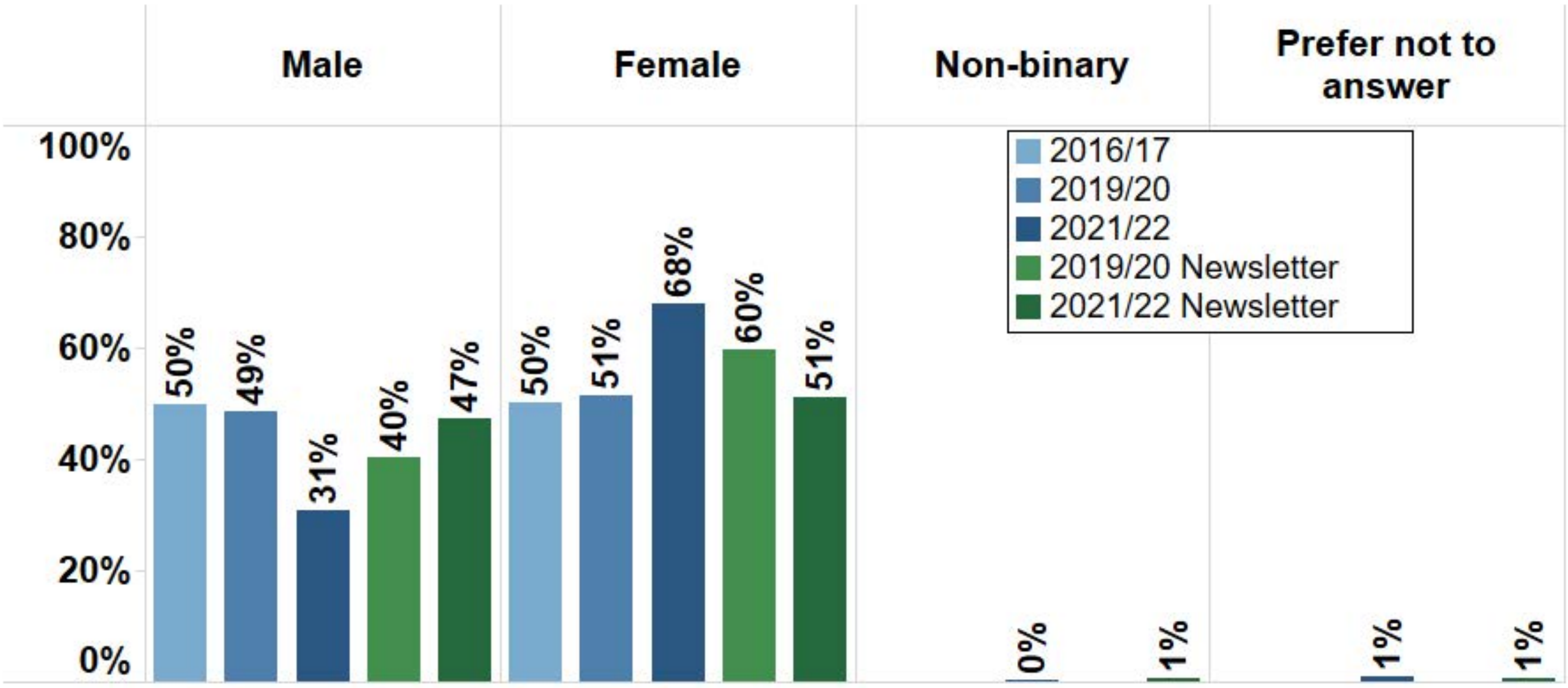
Visitor Gender Profile

Winter 2016 - 2022

- Winter visitors in both samples tend to skew more towards females than males. Since the 2016/17 season at least 50% or more visitors have been female, maxing out at 68% in the 2021/22 winter season.

- The gender share within the newsletter is somewhat more evenly distributed, particularly this winter, with 51% females.

(In general, women tend to participate more often than men in “self-selected” survey research.)



Annual Pre-tax Household Income

Winter 2016 - 2022

- Winter visitors in both samples have seen a pattern of increasing household incomes over time, especially in the $100,000 to $199,999 category, topping out at 34% in 2021/22 for general respondents and 36% for newsletter respondents.

- While newsletter respondents saw a drop in the $25-49K range (-7 ppt to 4%), there was an increased share in the $75-99K range (+10 ppt to 28%).

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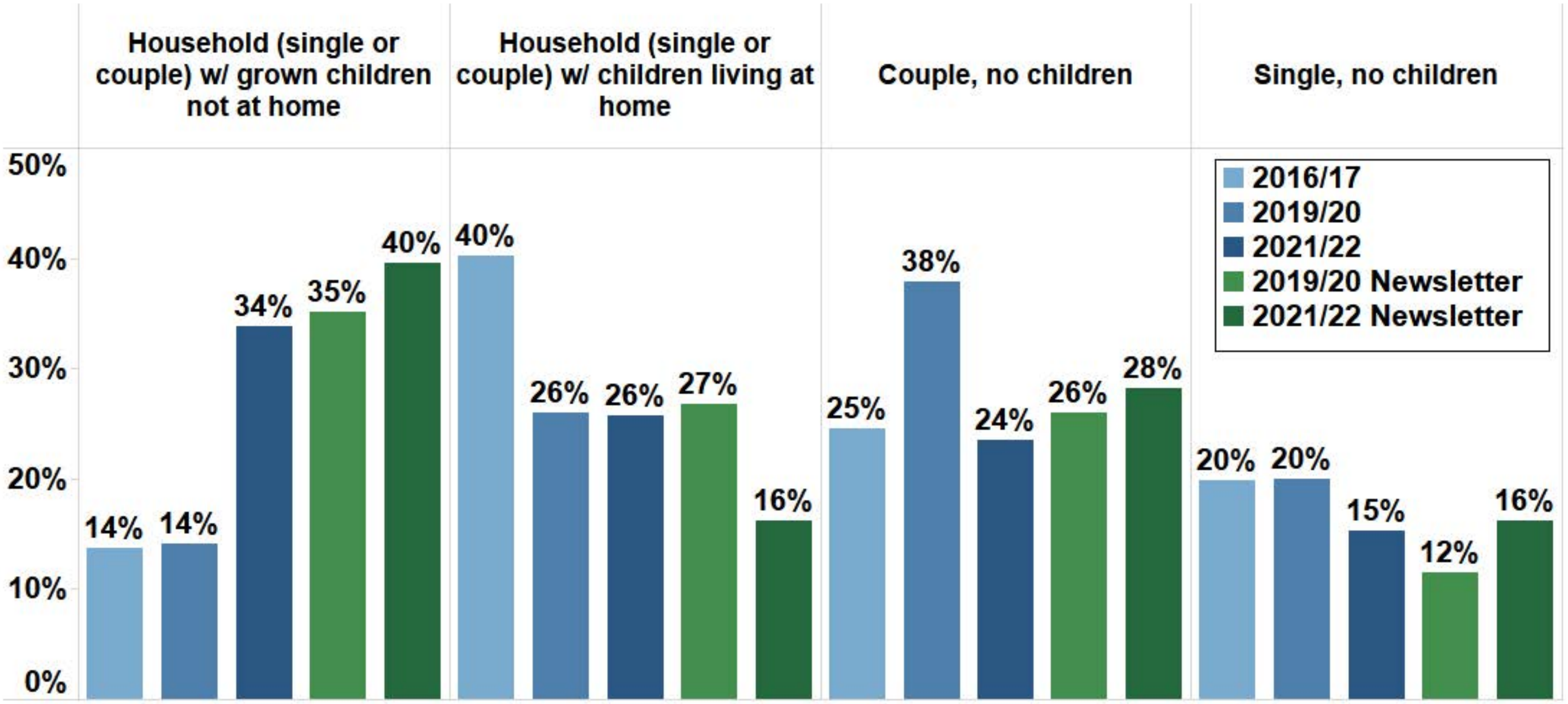
Marital Status

Winter 2016 - 2022

- Within the general sample, shares from households with grown children increased (+20 ppts to 34%), surpassing households with children at home (26%) for the first time in 3 seasons. Meanwhile, the share of couples with no children decreased to 24%).

- Newsletter respondents were somewhat more consistent YOY, but did see a modest drop in the share of households with children at home (-11 ppts to 16%).



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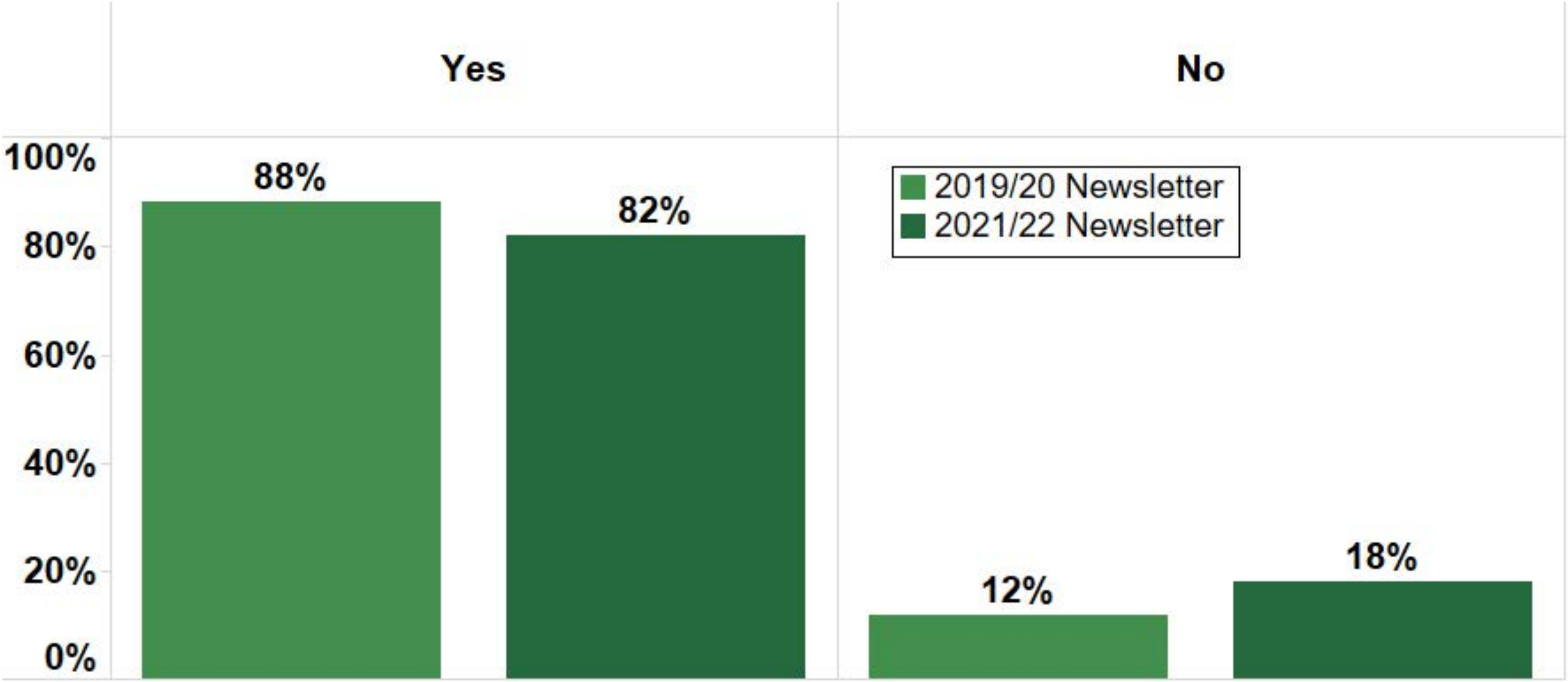
Prospective Visitors (Newsletter Database Survey)

Prospective Visitors

Considering visiting Bend in next 12 months?

- As mentioned in the introduction of the report, 50% of respondents to the newsletter survey had not visited Bend within the past 24 months (or ever) and were asked a separate set of questions. This percentage increased from 43% in the 2019/20 newsletter survey. These respondents are considered to be “prospective visitors” for purposes of analyses.

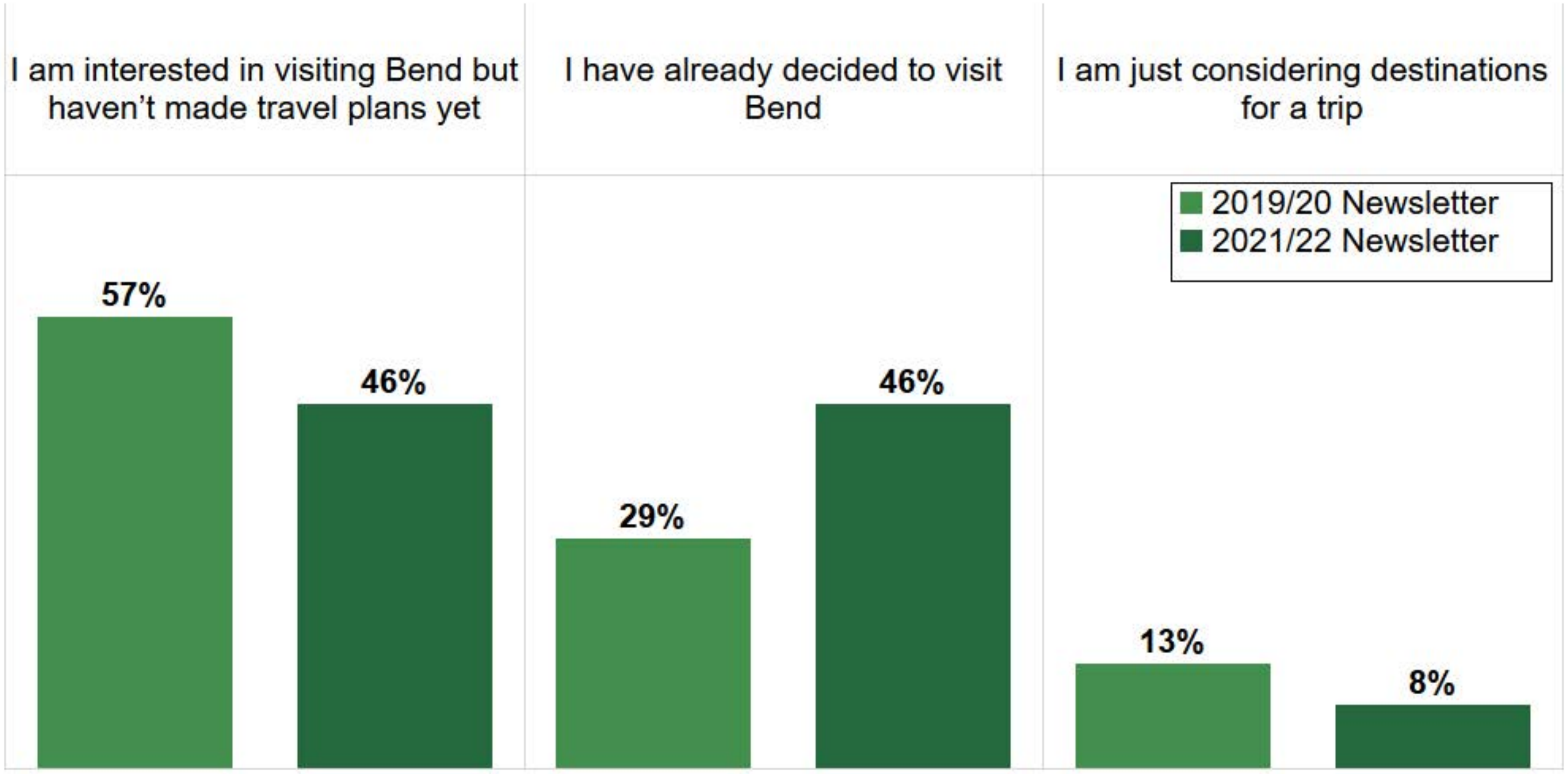
- At of the time of the survey in Winter 21/22, most prospective visitors were considering visiting Bend over the next 12 months (82%) with only 18% responding they were not considering visiting, up from 12% in the 2019/20 season.



Prospective Visitors

Which best describes where you are in the trip planning process?

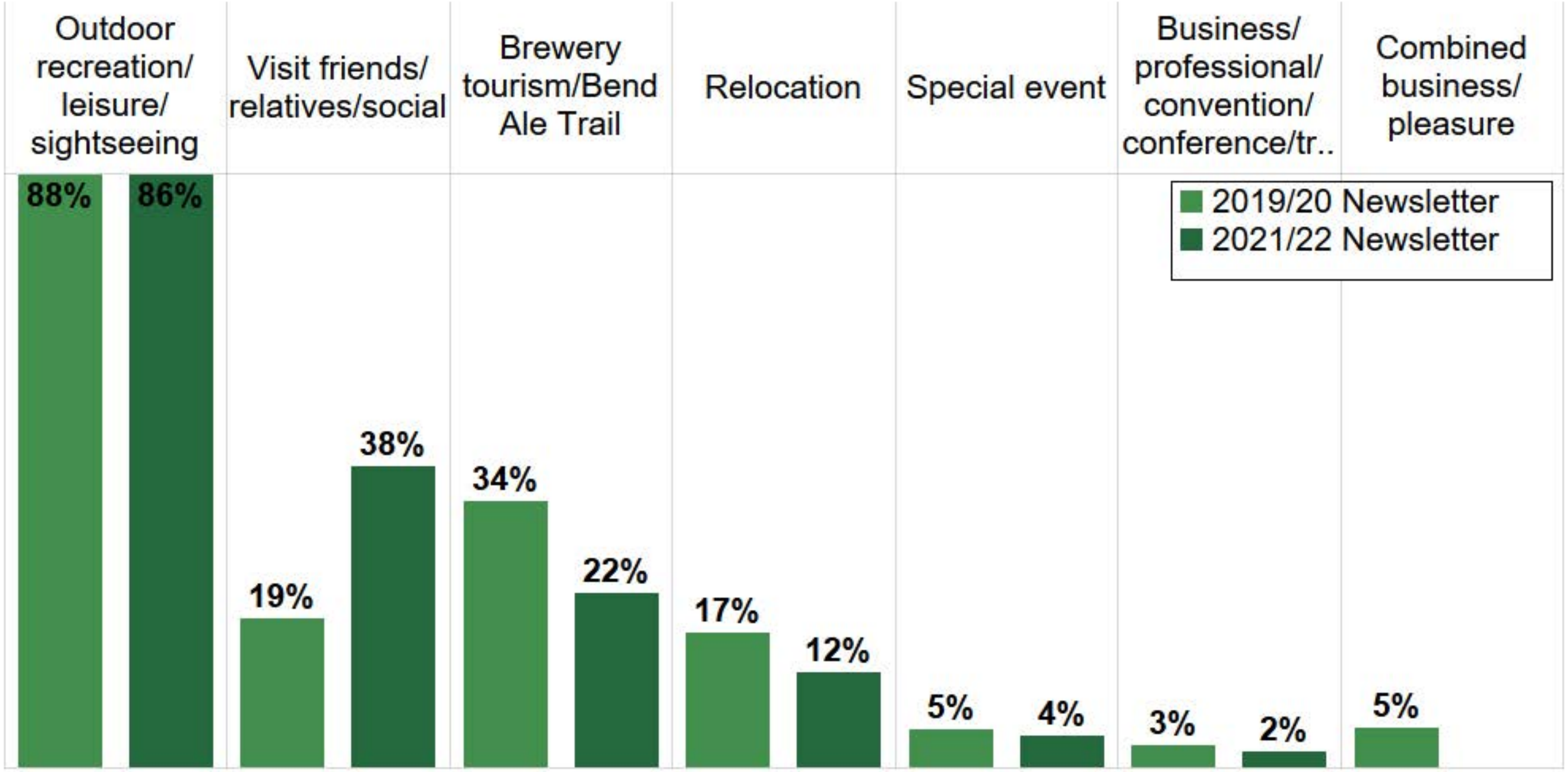
- An encouraging finding from the research about prospective visitors is that the percentage indicating that they have already decided to visit Bend jumped to 46% from 29% in 2019/20.
- The same percentage (46%) are interested in visiting but haven't made plans yet.
- Only 8% are in the phase of considering destinations for their trip.



Prospective Visitors

For which reasons are you considering visiting Bend?

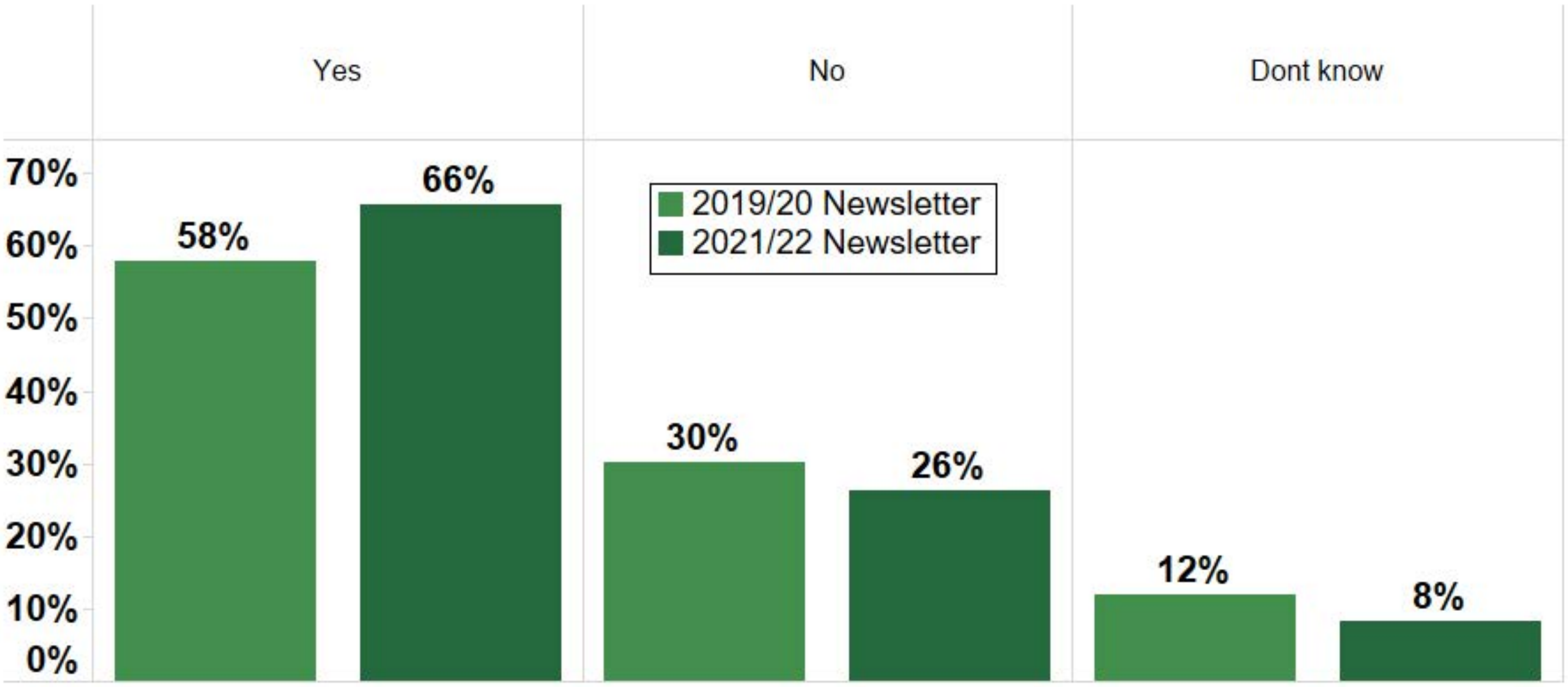
- Like previous visitors, it is not surprising that a substantial share of prospective visitors (86%) prospective visitors (86%) are considering Bend because of its outdoor recreation opportunities. Visiting friends/relatives and brewery tourism follow at 38% and 22%. An additional 12% interested in relocating to the area.



Prospective Visitors

Have you seen or heard any advertising about Bend in past 12 months?

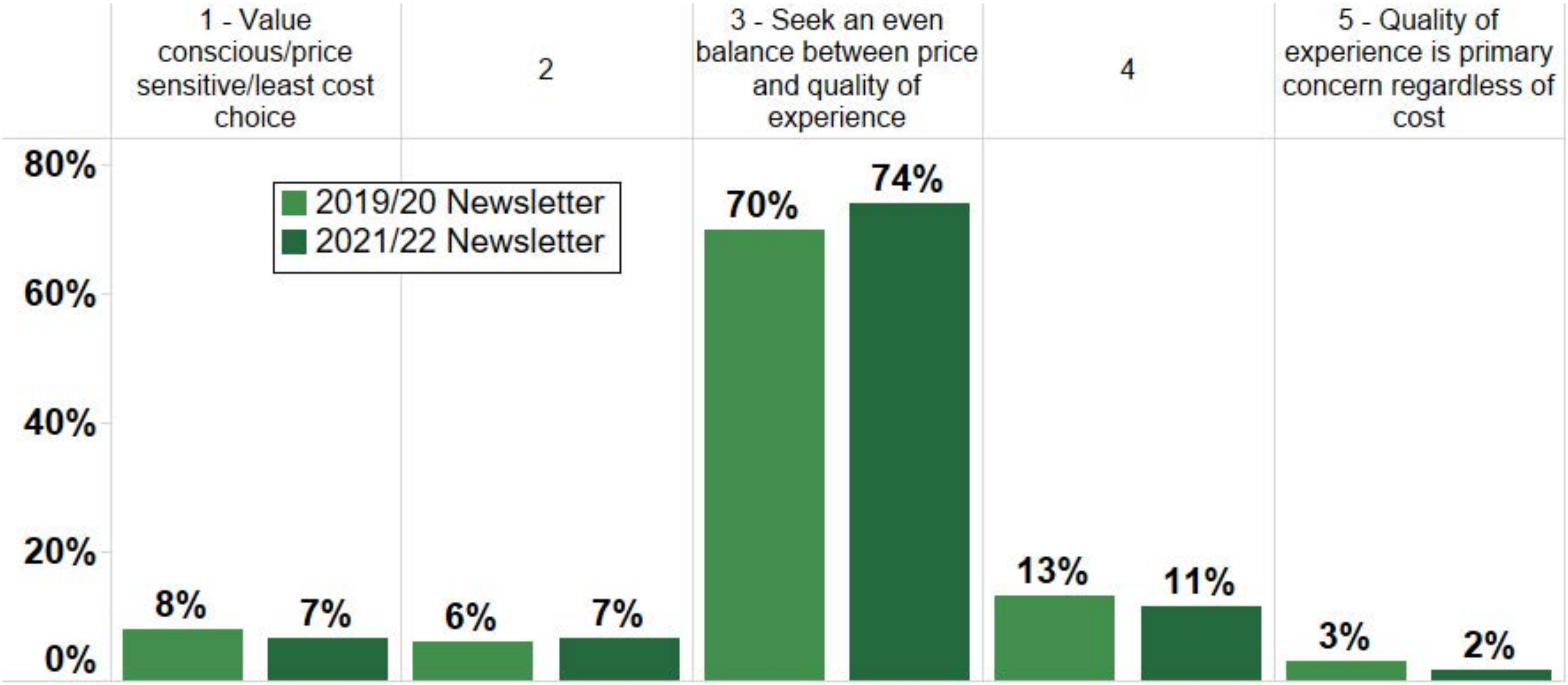
- More than half of prospective visitors have seen or heard advertising about Bend in the past 12 months while 26% have not. A small percentage (8%) are unsure if they have seen advertising.



Prospective Visitors

How would you classify yourself in planning your vacations?

- Most prospective visitors are seeking a balance between price and the quality of a vacation experience (74%). In 2021/22, a consistent percentage answered that the quality of experience is the primary concern regardless of cost at 2%, while 7% answered the value of a choice and least cost choice is most important.



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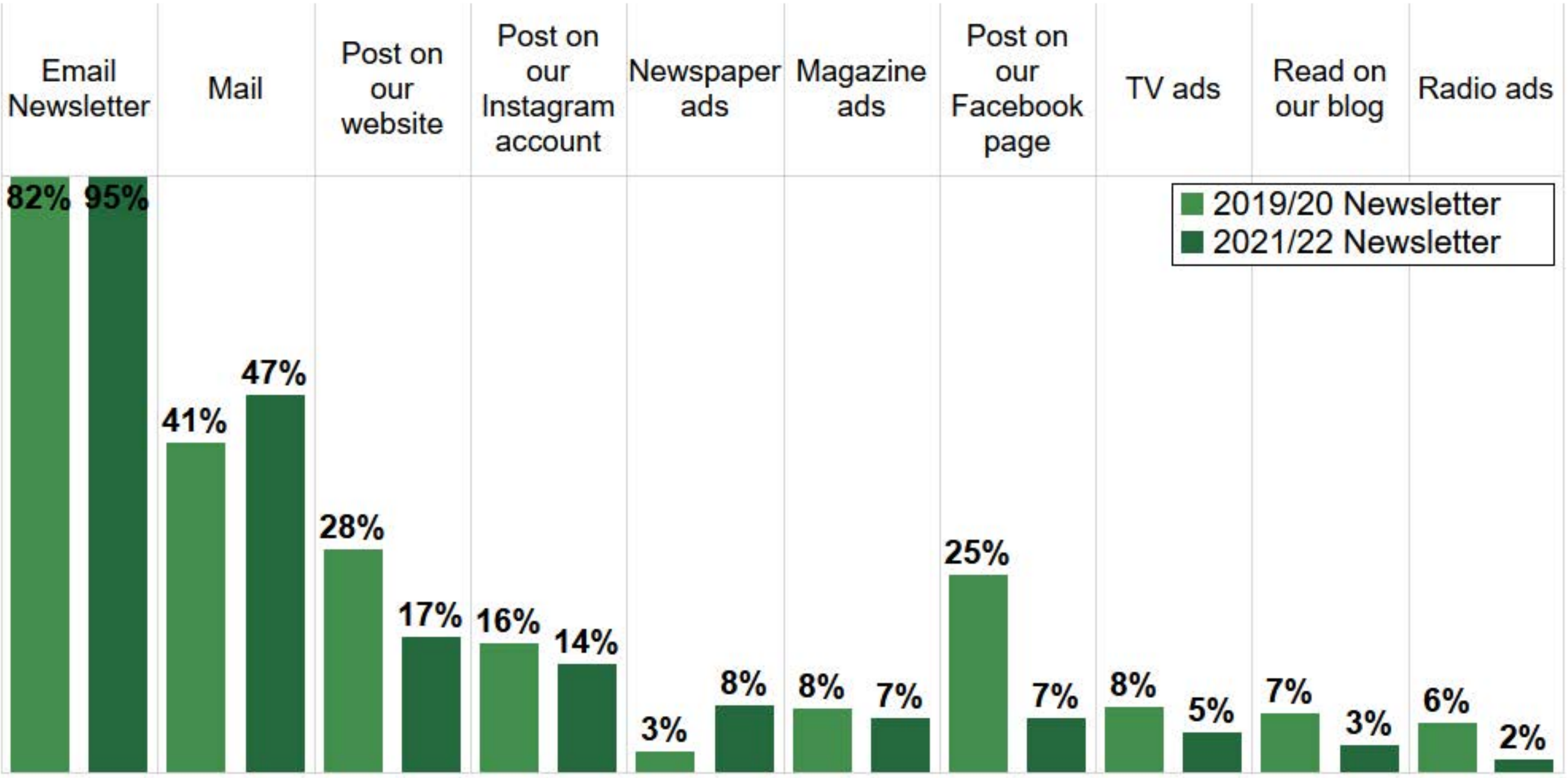
Prospective Visitors

In general, what is the best way for us to reach you to make you aware of events, special packages, area improvements, etc.?

- Among this specific sample, the email newsletter (95%) continues to be the best method to reach potential visitors, with regular mail following (47%). Posts on the website (17%) and Instagram (14%) are also popular among prospective visitors. Interestingly, Facebook posts as a potential information source decreased from 25% to 7%.



2021/22 Communication Strategies

Email Newsletter	**95%**
Mail	**47%**
Website	**17%**
Facebook	**7%**
Instagram	**14%**

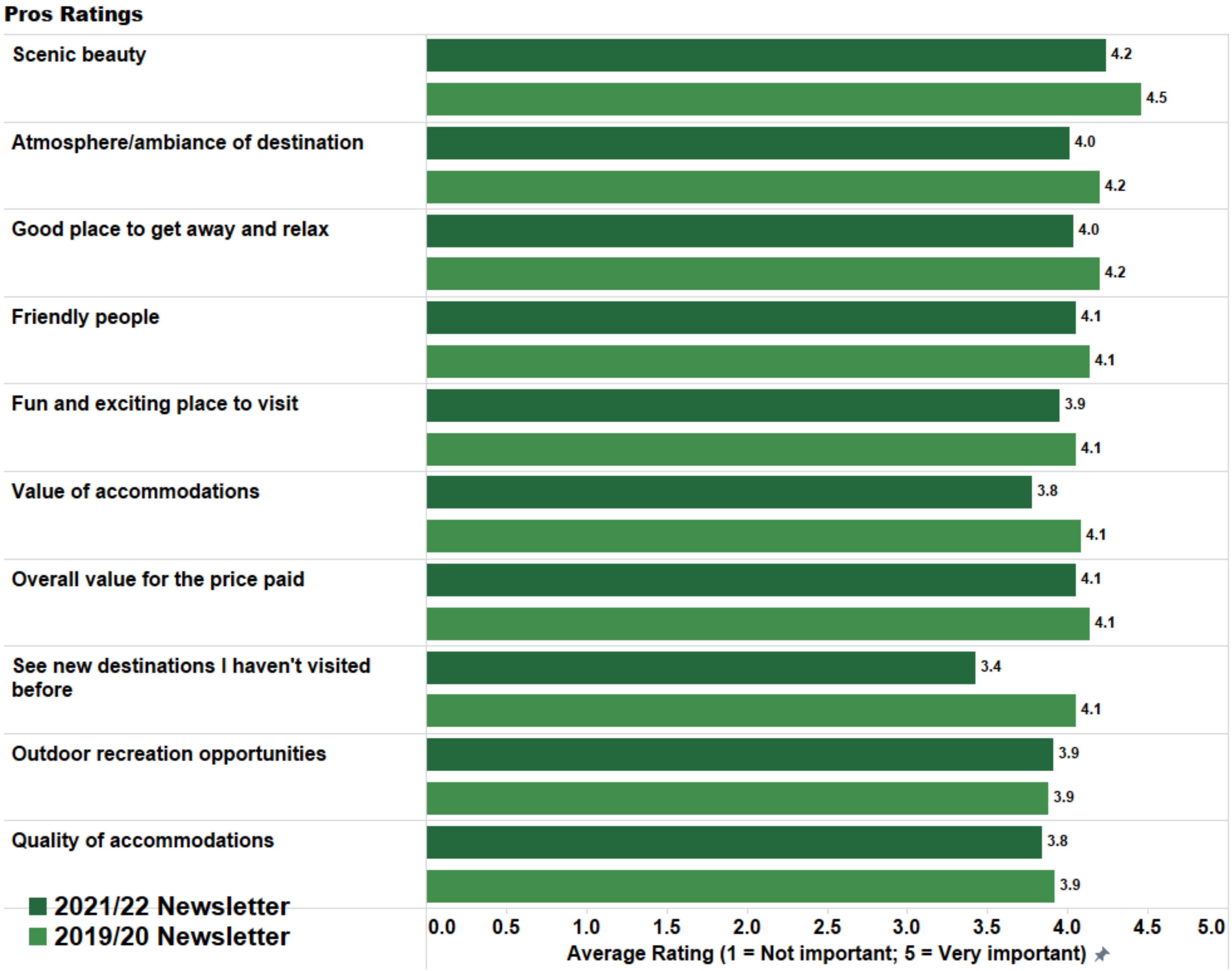
Prospective Visitors

Rate importance of factors in choosing a vacation destination

- Prospective visitors were asked how important certain aspects are in general when choosing a vacation destination. On a scale of 1 to 5 for importance, scenic beauty (4.2), friendly people (4.1), overall value (4.1), atmosphere / ambiance of destination (4.0), and a good place to get away and relax (4.2) are again the most important aspects.

- The importance of seeing a new destination dropped, perhaps related to pandemic patterns of wanting to visit familiar locations.

> **Prospective visitors planned to take an average of 4.7 overnight trips in 2021/22 vs. 4.0 trips in 2019/20.**



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General Takeaways

- **Newsletter Survey Key States**: Respondents to the newsletter survey are slightly more likely to be from states other than Oregon, Washington, and California (11% vs. 10% in the onsite surveys), although these three states continue to dominate, lead by Oregon with 24%, California with 18%, and Washington with 15%.

- Newsletter respondents are older (49.9 average age) and more likely to be empty nesters (40%).

- Most *prospective* visitors (46%) were considering visiting Bend within the next 12 months but have not made plans, while an additional 46% have already decided they will visit next winter.

Thank You

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