

TRAVEL



OREGON

MT. HOOD AREA VISITOR SURVEY
OVERVIEW OF RESULTS

1.7.2019

AGENDA

01 INTRODUCTION

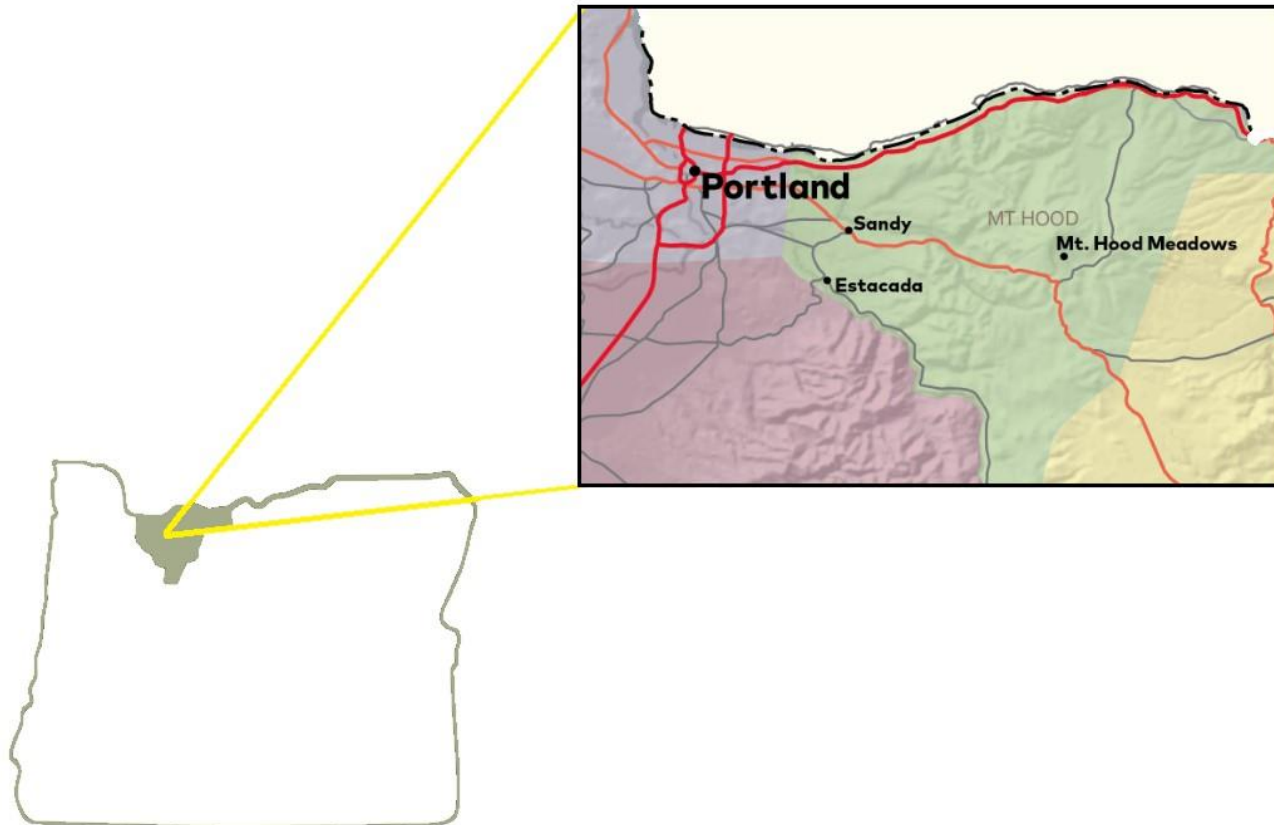
02 VISITOR OVERVIEW

03 KEY FINDINGS, RECOMMENDATIONS, & SUPPORTING EVIDENCE

04 Q & A

01 INTRODUCTION

STUDY AREA





Research Goals

This study was conducted to assist Travel Oregon, Mt. Hood Territory, and other relevant stakeholders in understanding the profile of visitors to the Mt. Hood area. Results will be used to inform future programming, tourism development, marketing, and transportation strategy in the region.

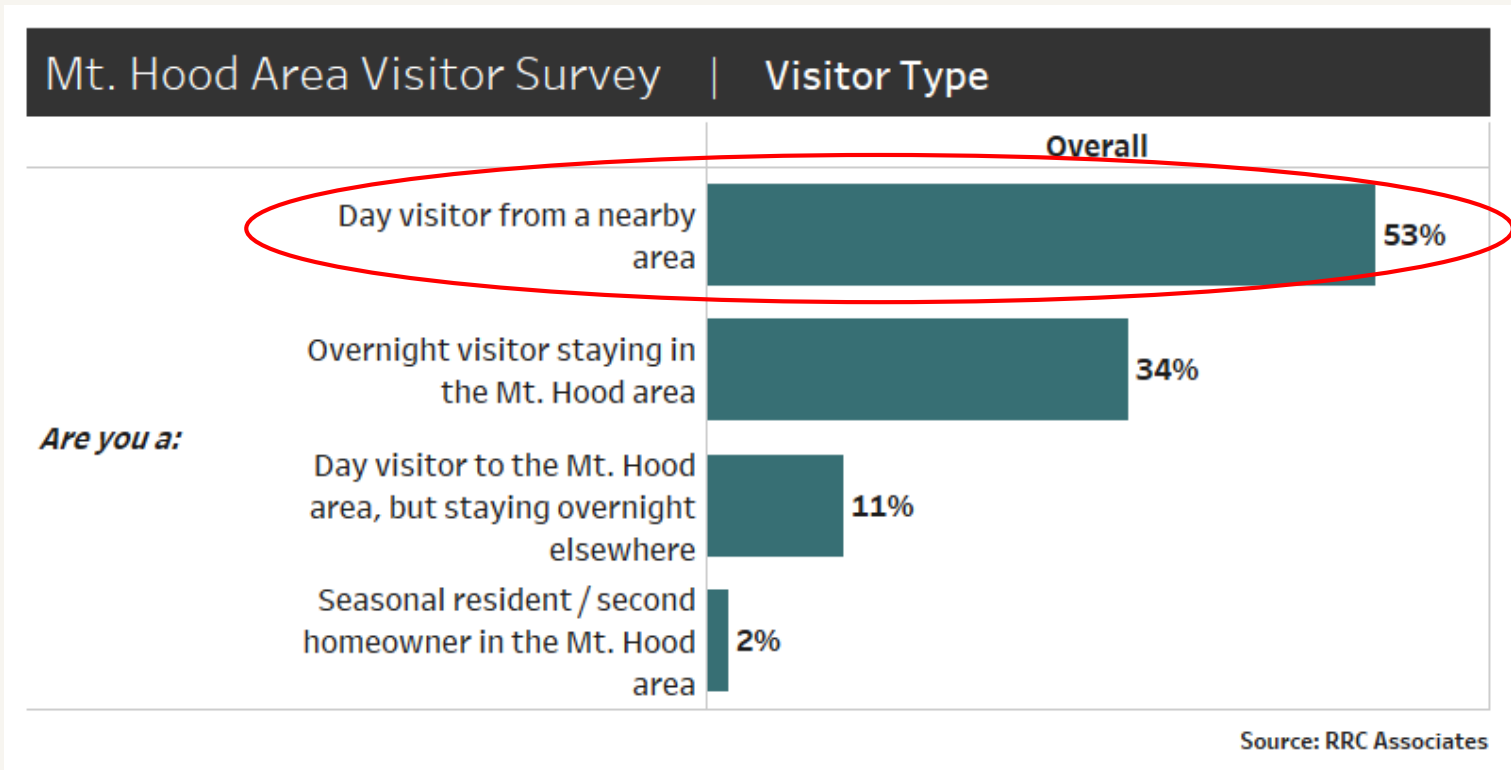
METHODOLOGY

- 995 surveys conducted between March 2 and June 26, 2018 throughout the Mt. Hood region. Margin of error approximately +/-3.1 percentage points calculated for questions at 50% response.
- Roughly 17 survey locations grouped into 4 major locations for analysis: Estacada, Sandy, Ski Resorts, and Other Highway 26 Locations
- Results grouped into 2 seasons (Late Winter and Spring) for analysis; determined by analyzing weather data (Late Winter: April 23 & earlier / Spring: April 24 & later)
- Some data treatment occurred, including recoding visitor type based on self-reported accommodations location, suppressing interview location for the locations visited question, and removing outliers from expenditure data.
- Respondents given stickers/pins as incentives. Prize drawing at the end of the project (5 \$50 Visa cash cards).

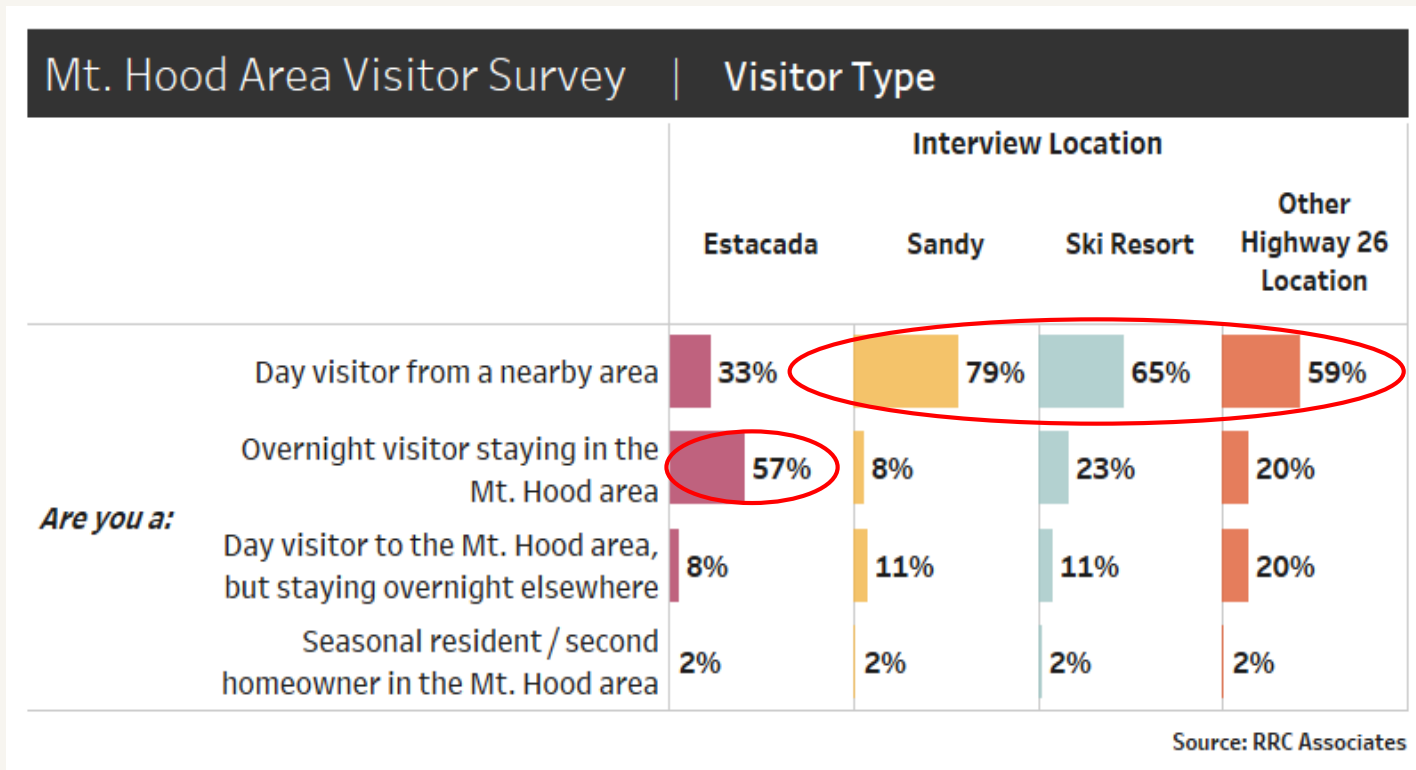
Survey Location	Grouped As:
Downtown Estacada	Estacada
Milo McIver State Park	
Upper Clackamas Whitewater Festival	
Metzler Park	Sandy
Downtown Sandy	
Sandy Ridge Trailhead	
Mt. Hood Meadows	Ski Resort
Mt. Hood Meadows Park & Ride	
Mt. Hood Skibowl	
Timberline Ski Area	
Timberline Resort Shuttle	
Camp Creek Campground	Other Highway 26 Location
Government Camp	
Mirror Lake Trailhead	
Mt. Hood Express	
Trillium Lake Trailhead	
Zigzag Mountain Trailhead	

02 VISITOR OVERVIEW

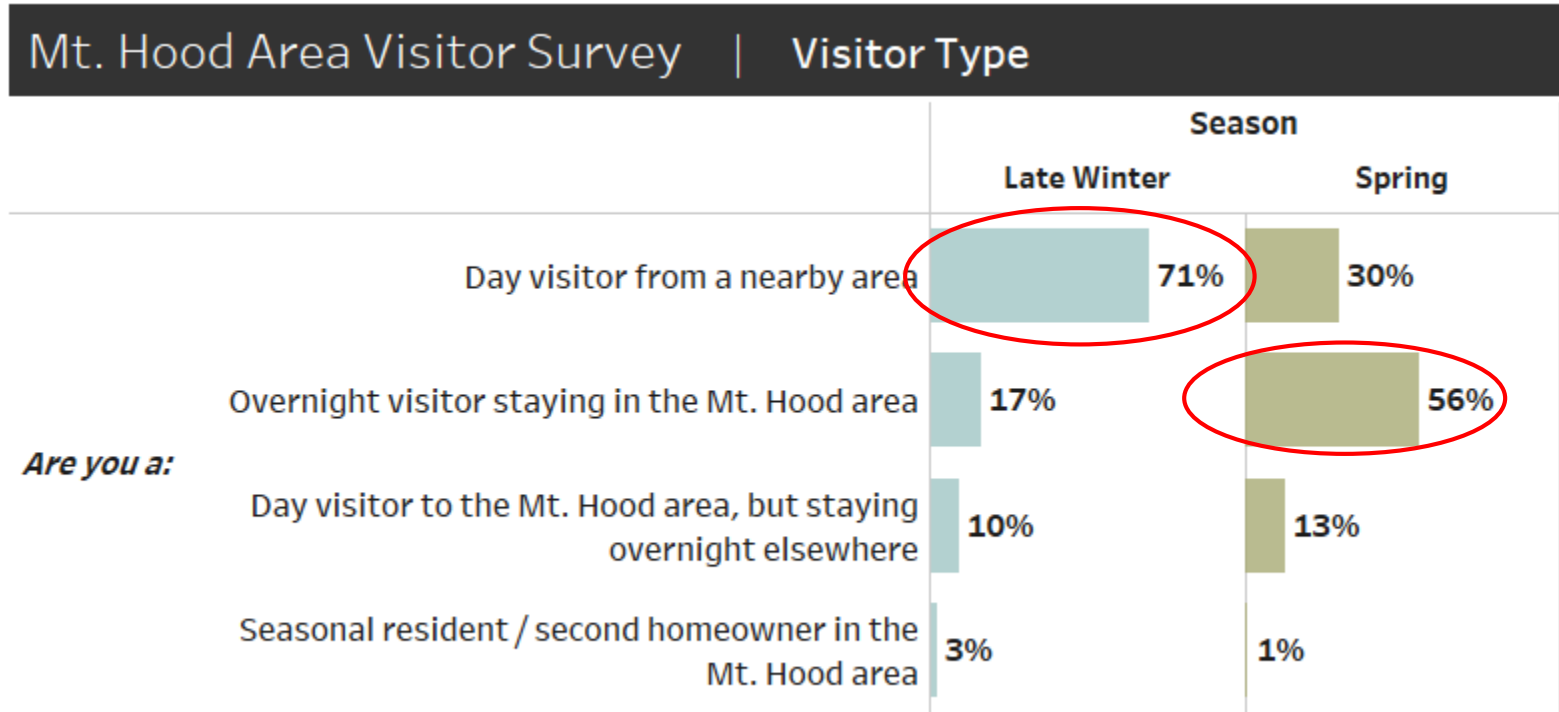
VISITOR TYPE



VISITOR TYPE BY INTERVIEW LOCATION

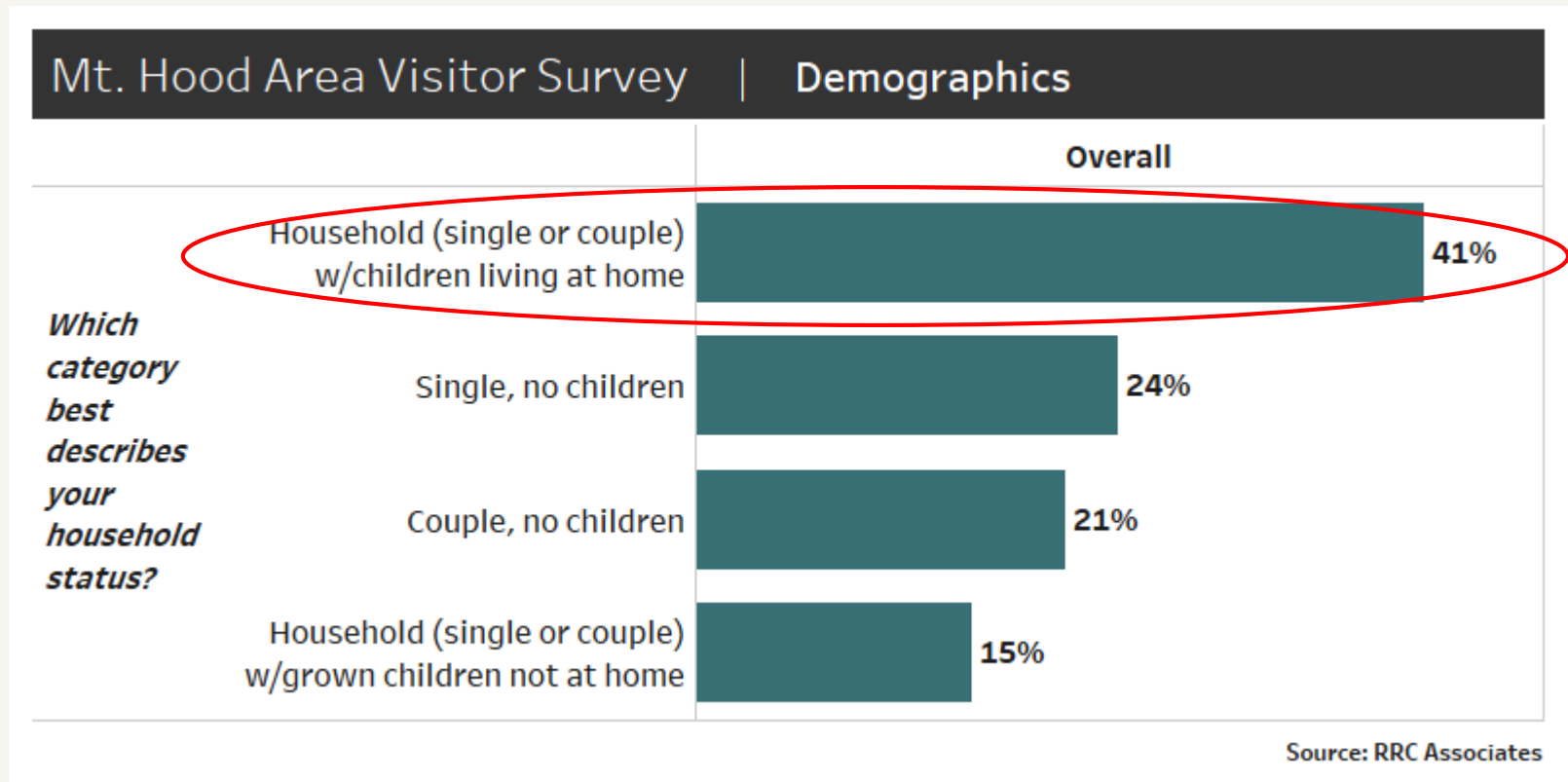


VISITOR TYPE BY SEASON

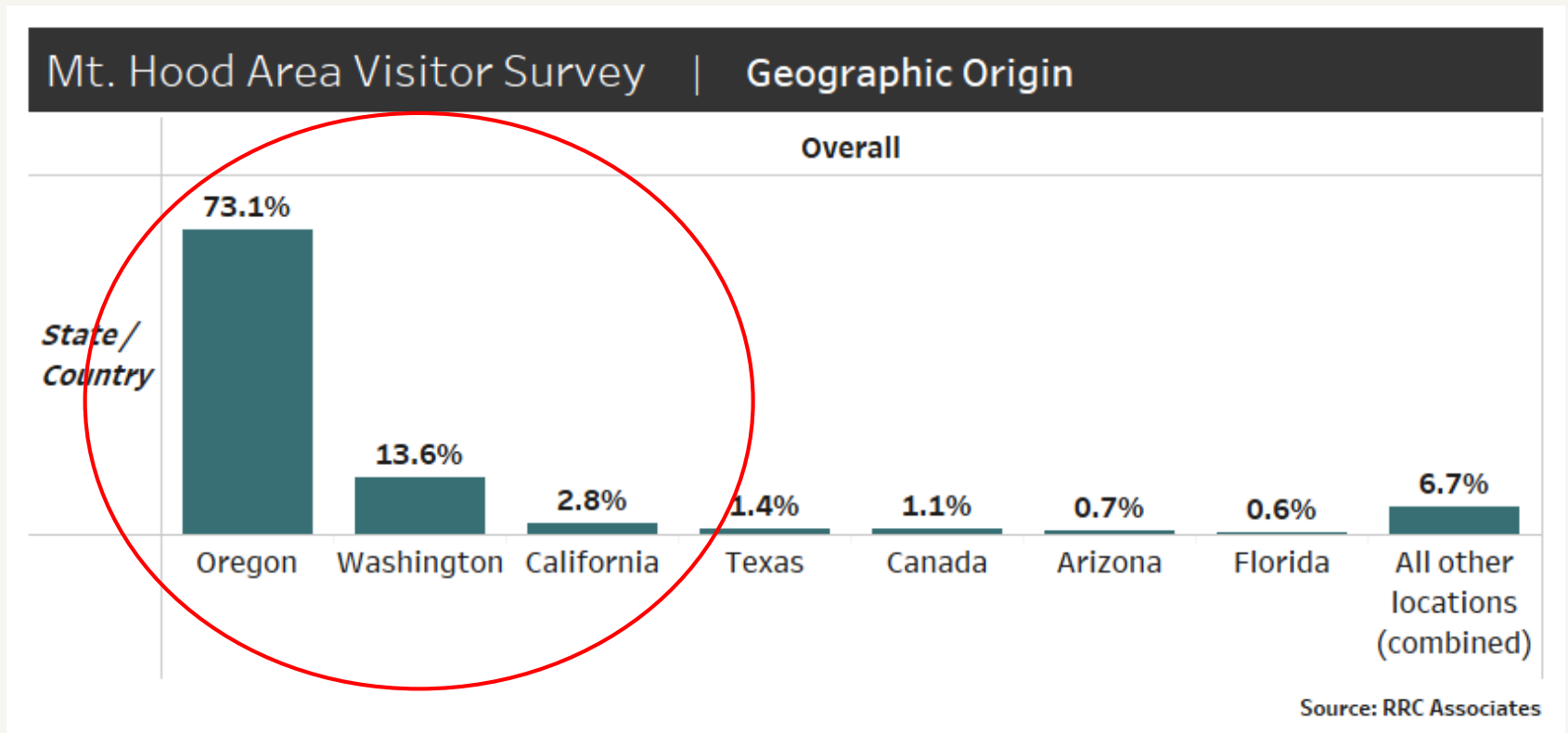


Source: RRC Associates

HOUSEHOLD COMPOSITION



GEOGRAPHIC ORIGIN (TOP STATES / COUNTRIES)



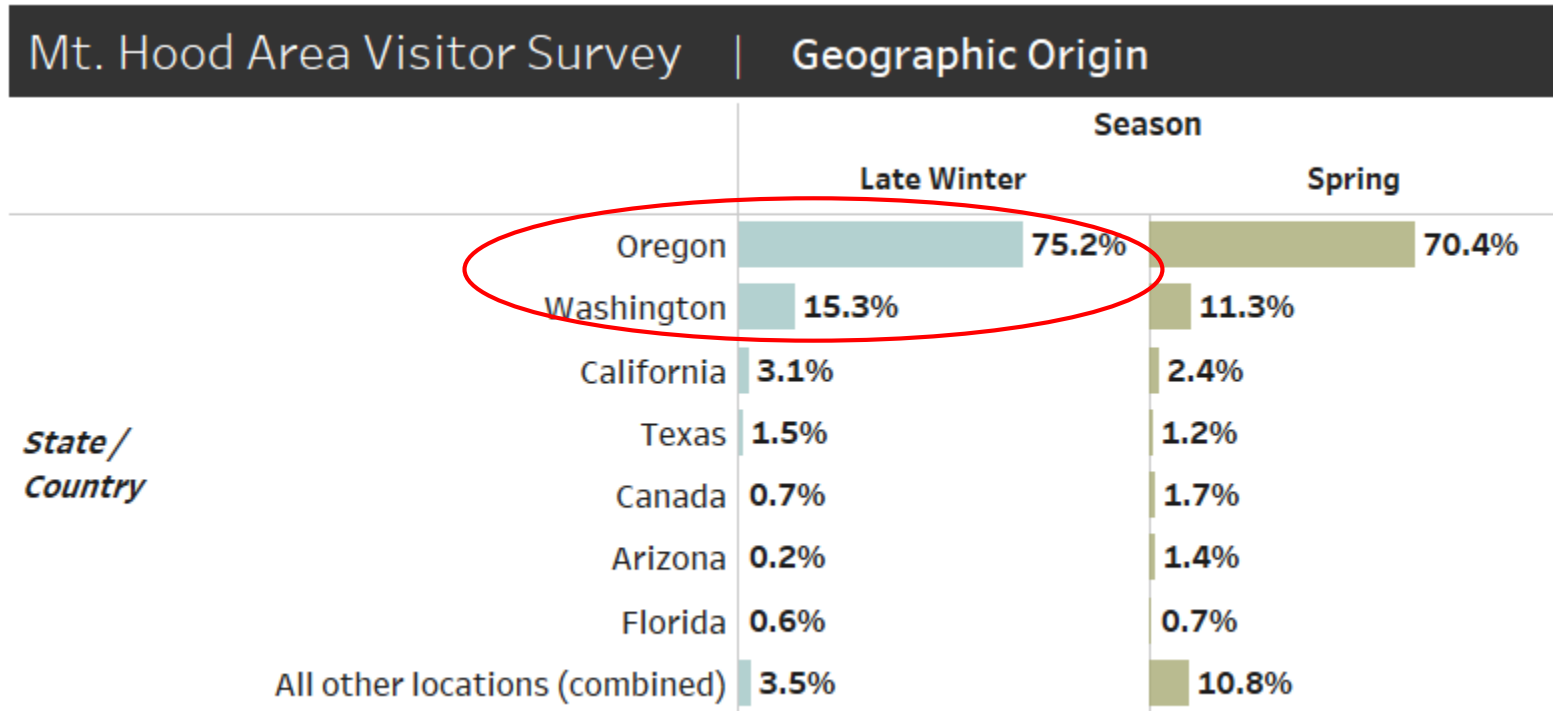
GEOGRAPHIC ORIGIN BY INTERVIEW LOCATION

Mt. Hood Area Visitor Survey | Geographic Origin

	Interview Location			
	Estacada	Sandy	Ski Resort	Other Highway 26 Location
Oregon	79.0%	73.6%	71.2%	56.3%
Washington	13.4%	11.6%	15.1%	11.7%
California	2.2%	5.8%	2.5%	2.9%
Arizona	0.3%	1.7%	0.6%	1.9%
Canada	0.8%	1.7%	0.8%	2.9%
Florida	0.5%		0.8%	1.0%
Texas	0.5%	1.7%	1.7%	2.9%
All other locations (combined)	3.2%	4.1%	7.3%	20.4%

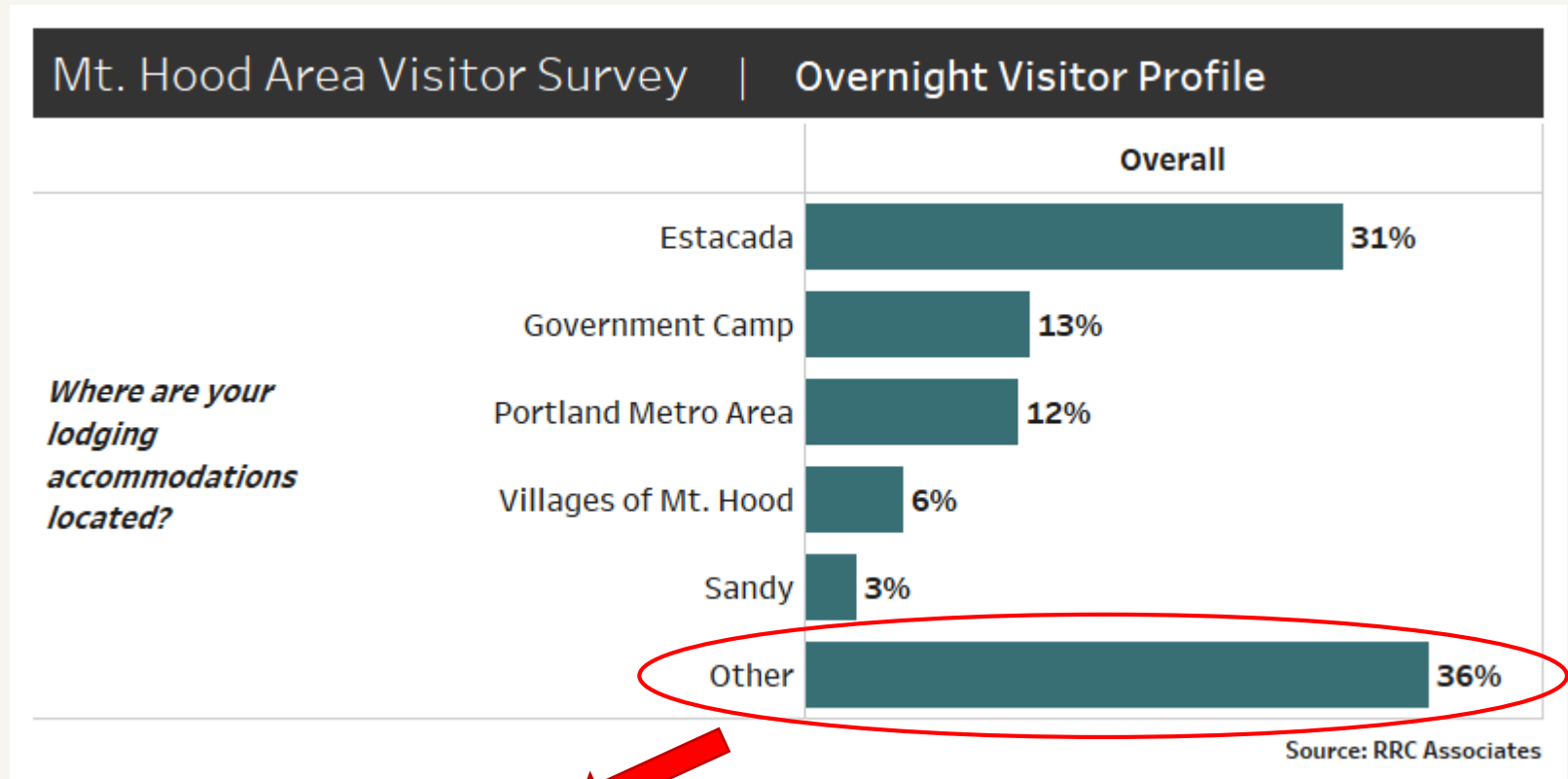
Source: RRC Associates

GEOGRAPHIC ORIGIN BY SEASON



Source: RRC Associates

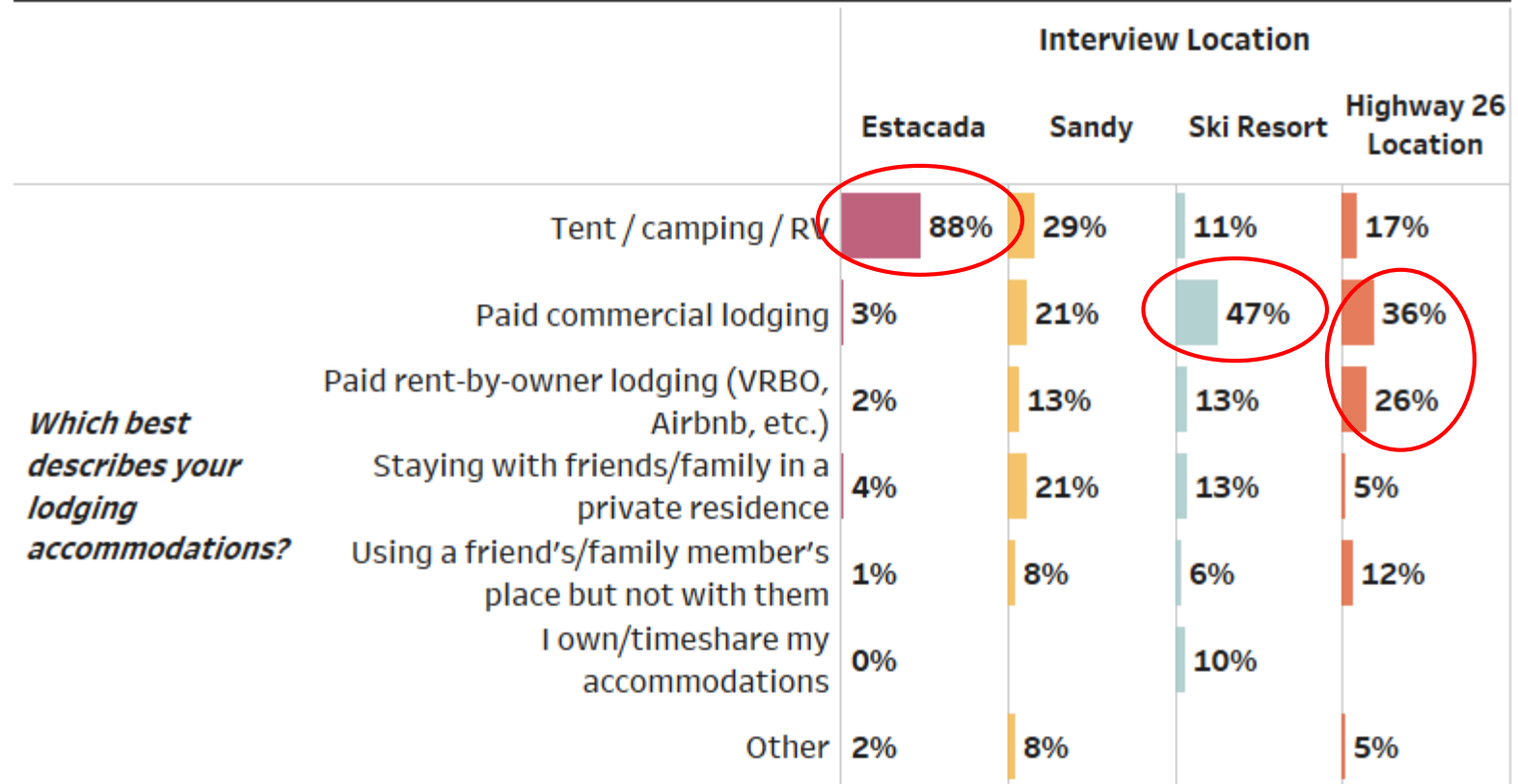
LODGING LOCATION



Hood River, Rhododendron, Welches, and campgrounds throughout Mt. Hood National Forest.

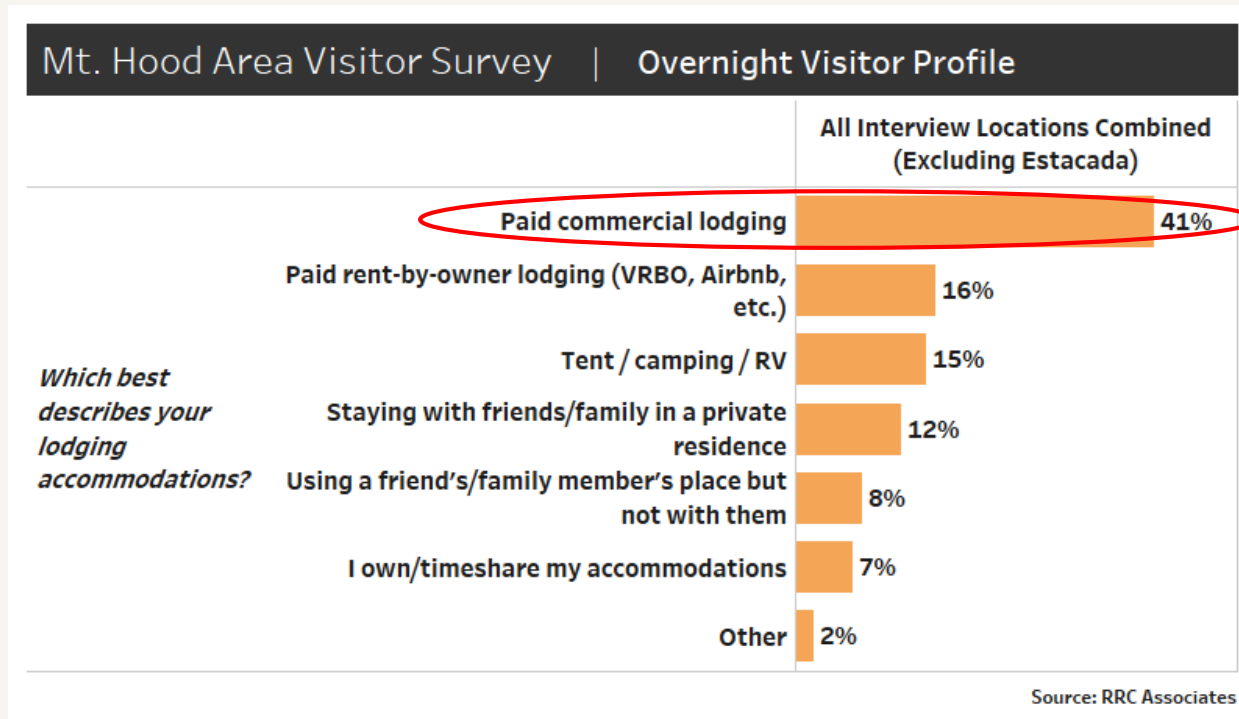
LODGING TYPE BY INTERVIEW LOCATION

Mt. Hood Area Visitor Survey | Overnight Visitor Profile



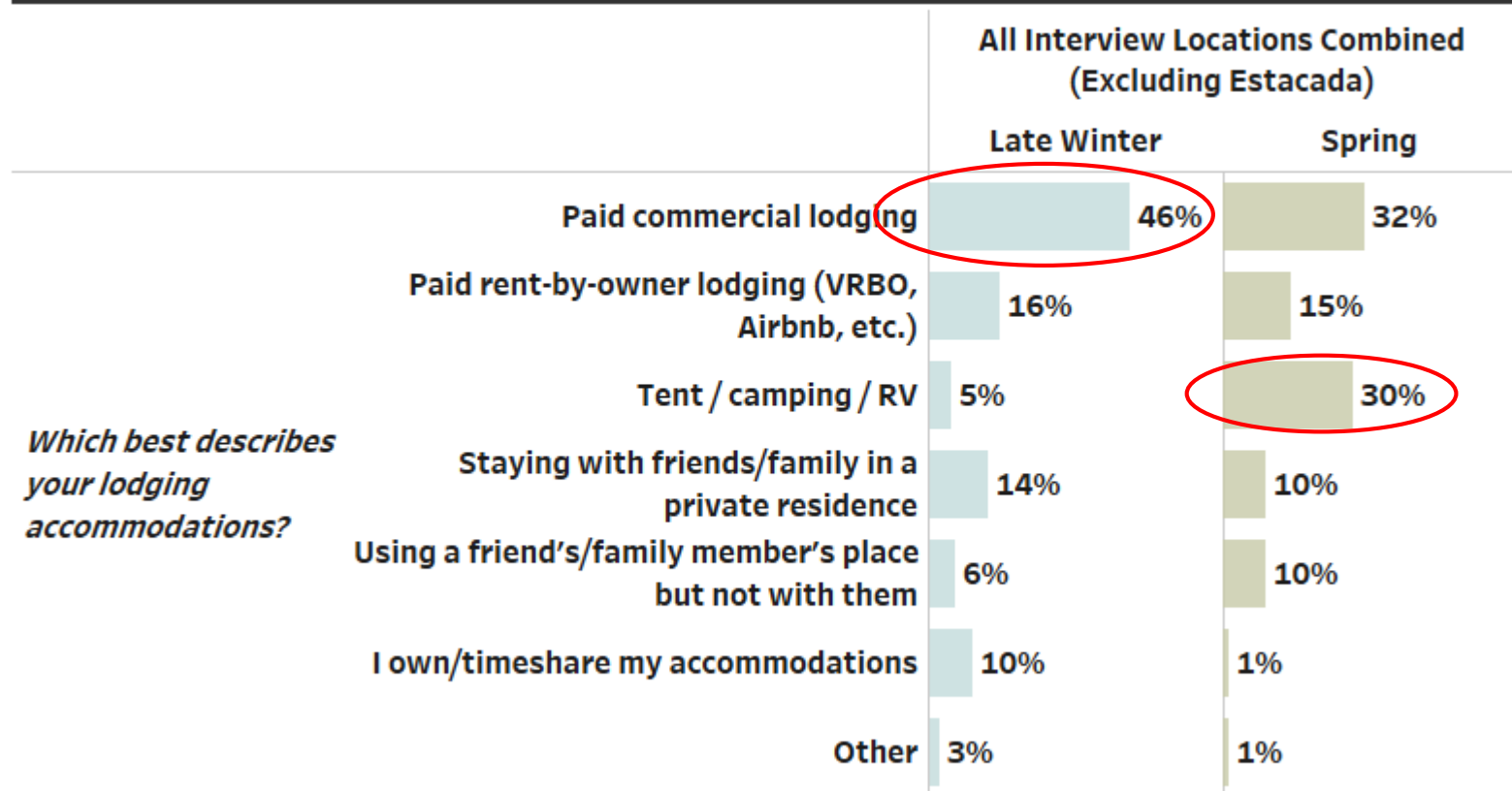
Source: RRC Associates

LODGING TYPE BY INTERVIEW LOCATION




LODGING TYPE BY SEASON

Mt. Hood Area Visitor Survey | Overnight Visitor Profile



Source: RRC Associates

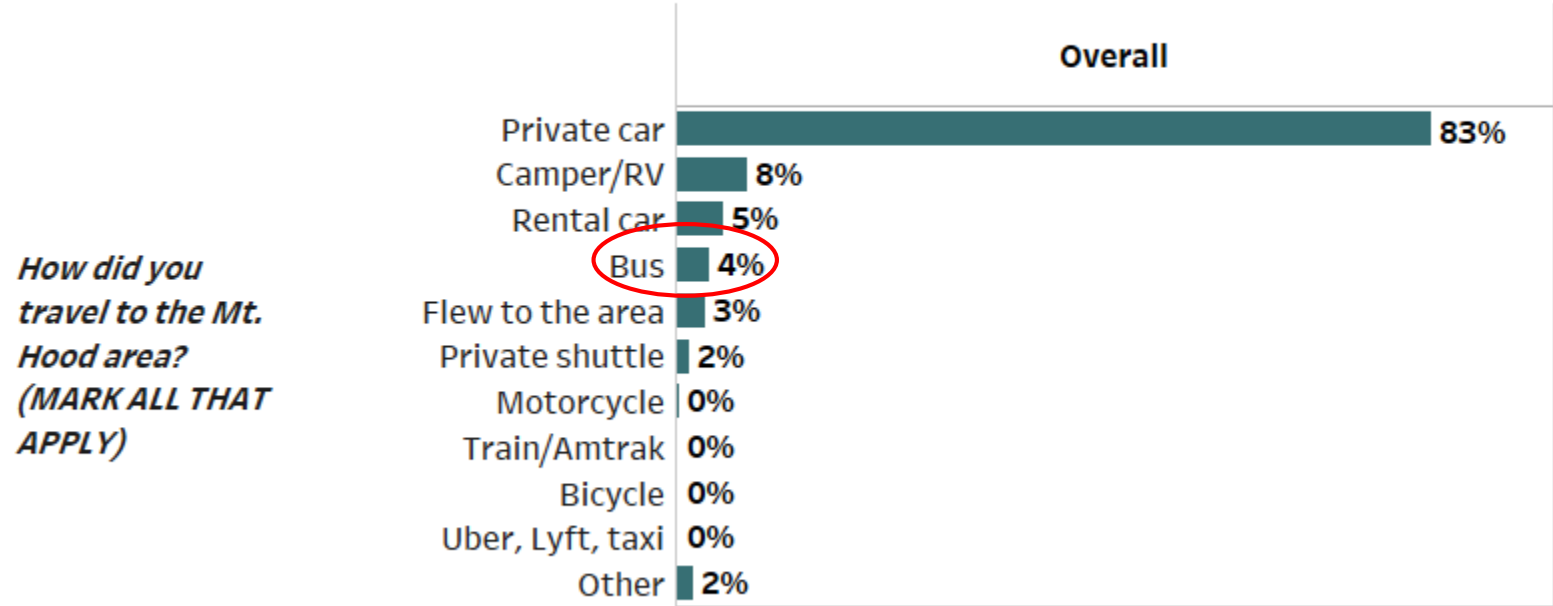
03 KEY FINDINGS, RECOMMENDATIONS, & SUPPORTING EVIDENCE

A woman with long, wavy brown hair is leaning out of the open window of a dark-colored car. She is wearing a black top and several bracelets on her left wrist. Her right hand is resting on the car's door frame. The car is driving on a paved road that curves through a mountainous landscape. The mountains are covered in green trees and patches of snow. The sky is blue with some white clouds. The overall scene conveys a sense of freedom and adventure.

PERSONAL
VEHICLES ARE,
BY FAR, THE
MOST USED
TRANSPORTATION
METHOD IN THE
REGION.

METHOD OF TRAVEL TO THE AREA

Mt. Hood Area Visitor Survey | Transportation

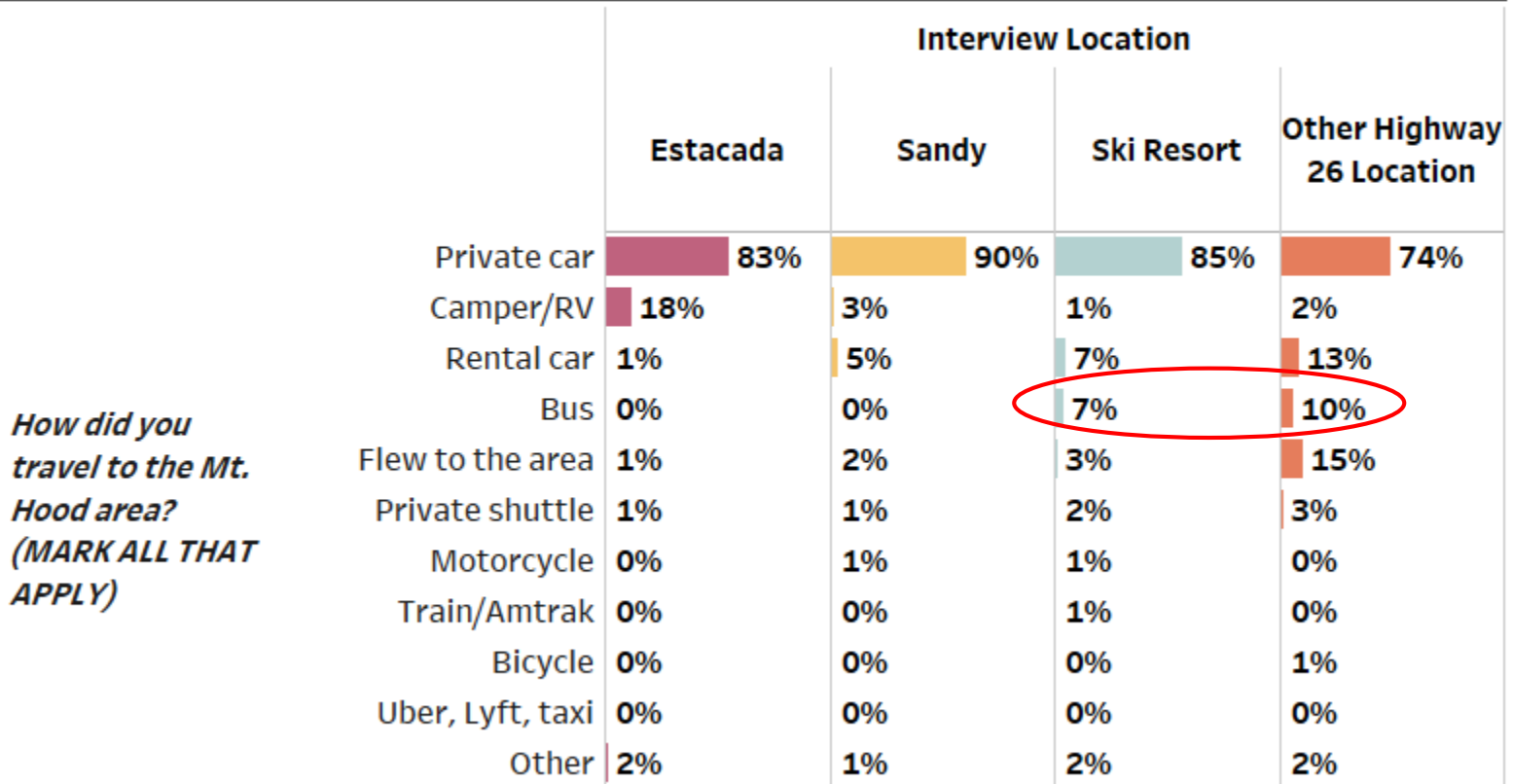


How did you travel to the Mt. Hood area? (MARK ALL THAT APPLY)

Source: RRC Associates

METHOD OF TRAVEL TO THE AREA BY INTERVIEW LOCATION

Mt. Hood Area Visitor Survey | Transportation

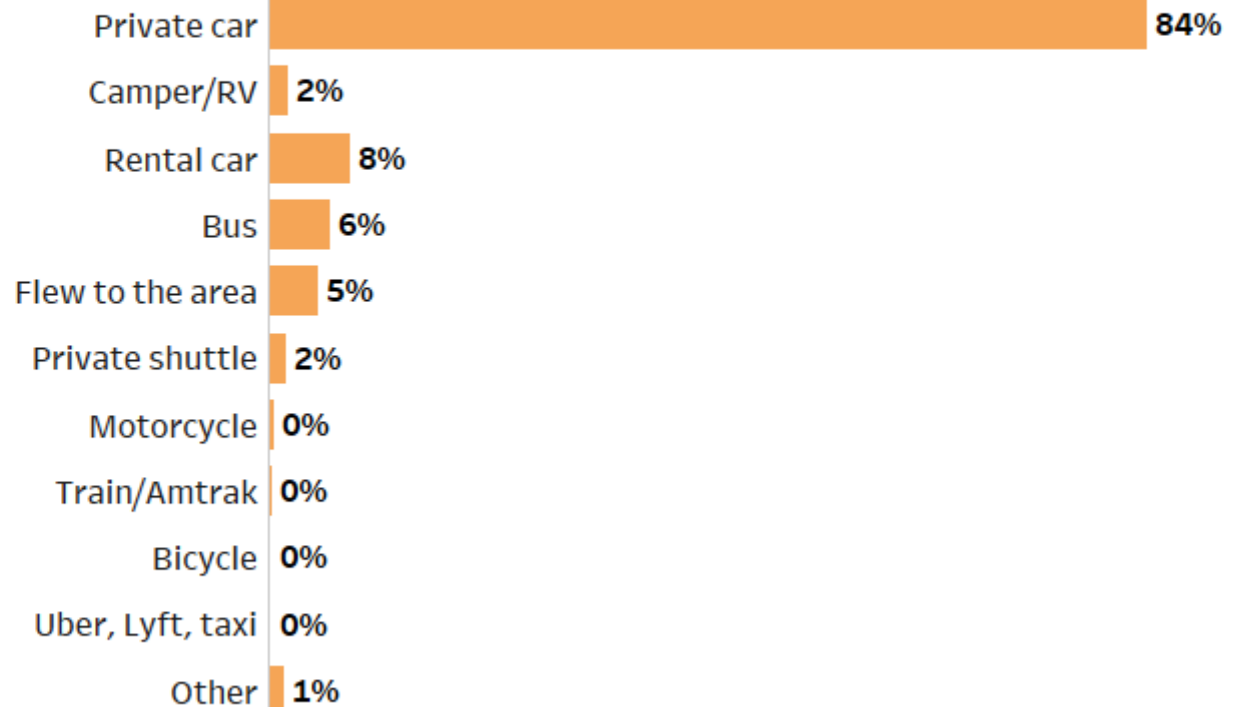


*How did you travel to the Mt. Hood area?
(MARK ALL THAT APPLY)*

METHOD OF TRAVEL TO THE AREA BY INTERVIEW LOCATION

Mt. Hood Area Visitor Survey | Transportation

All Interview Locations Combined (Excl. Estacada)

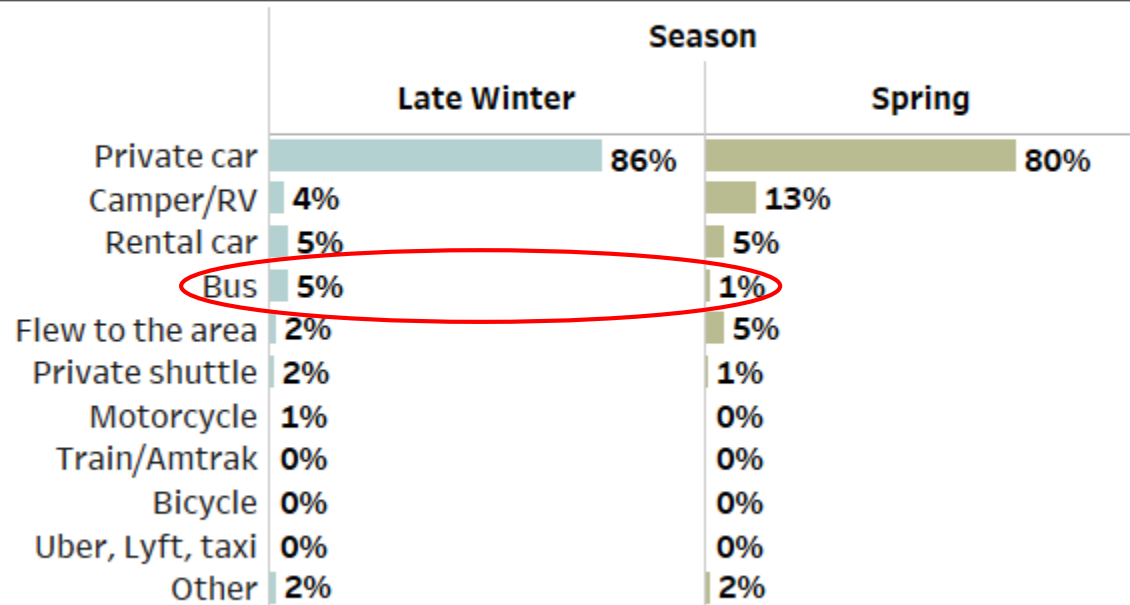


*How did you
travel to the Mt.
Hood area?
(MARK ALL THAT
APPLY)*

METHOD OF TRAVEL TO THE AREA BY SEASON

Mt. Hood Area Visitor Survey | Transportation

*How did you travel to the Mt. Hood area?
(MARK ALL THAT APPLY)*



Source: RRC Associates

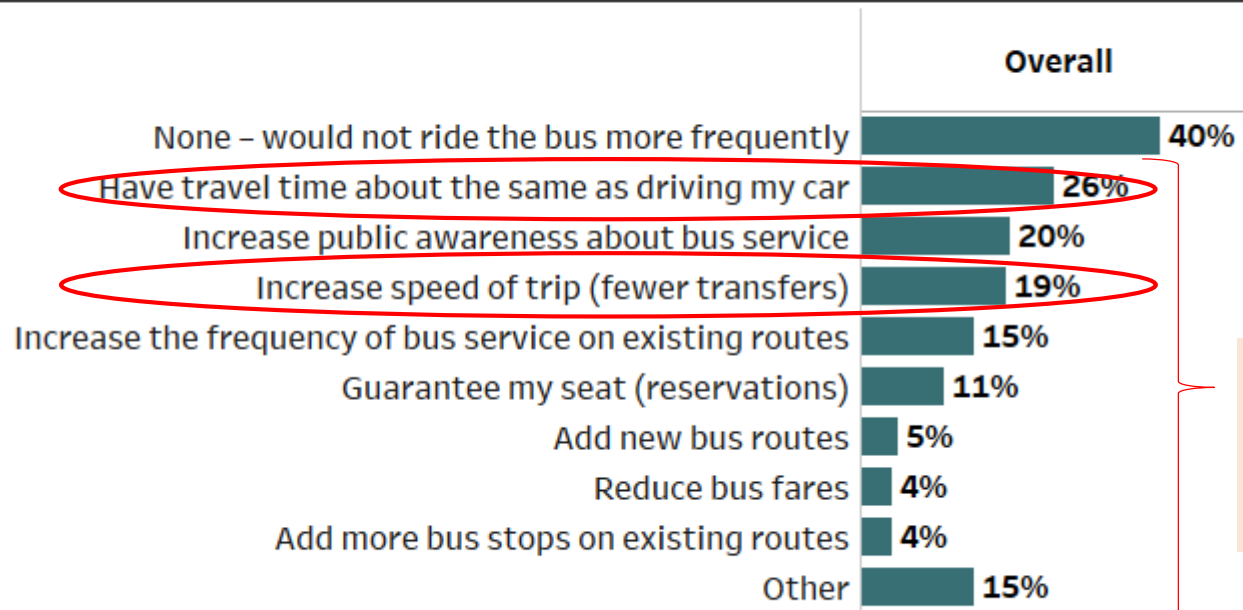
TO INCREASE
PUBLIC
TRANSPORTATION
USAGE, MAKE THE
EXPERIENCE AS
SEAMLESS AS
DRIVING A CAR.



FACTORS THAT WOULD INCREASE UTILIZATION OF PUBLIC TRANSIT

Mt. Hood Area Visitor Survey | Transportation

What, if anything, would most encourage you to take public transportation when traveling in this area in the future? (MARK ALL THAT APPLY)



Source: RRC Associates

60% of respondents cited at least 1 factor

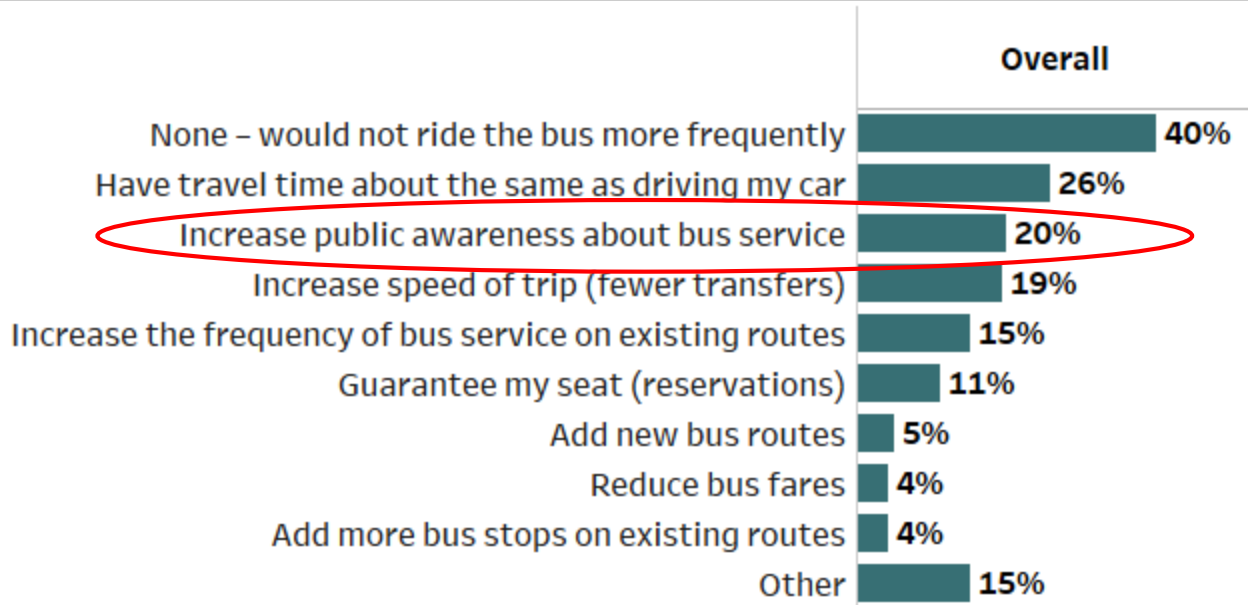
IMPROVE COMMUNICATIONS ABOUT PUBLIC
TRANSPORTATION OFFERINGS.



FACTORS THAT WOULD INCREASE UTILIZATION OF PUBLIC TRANSIT

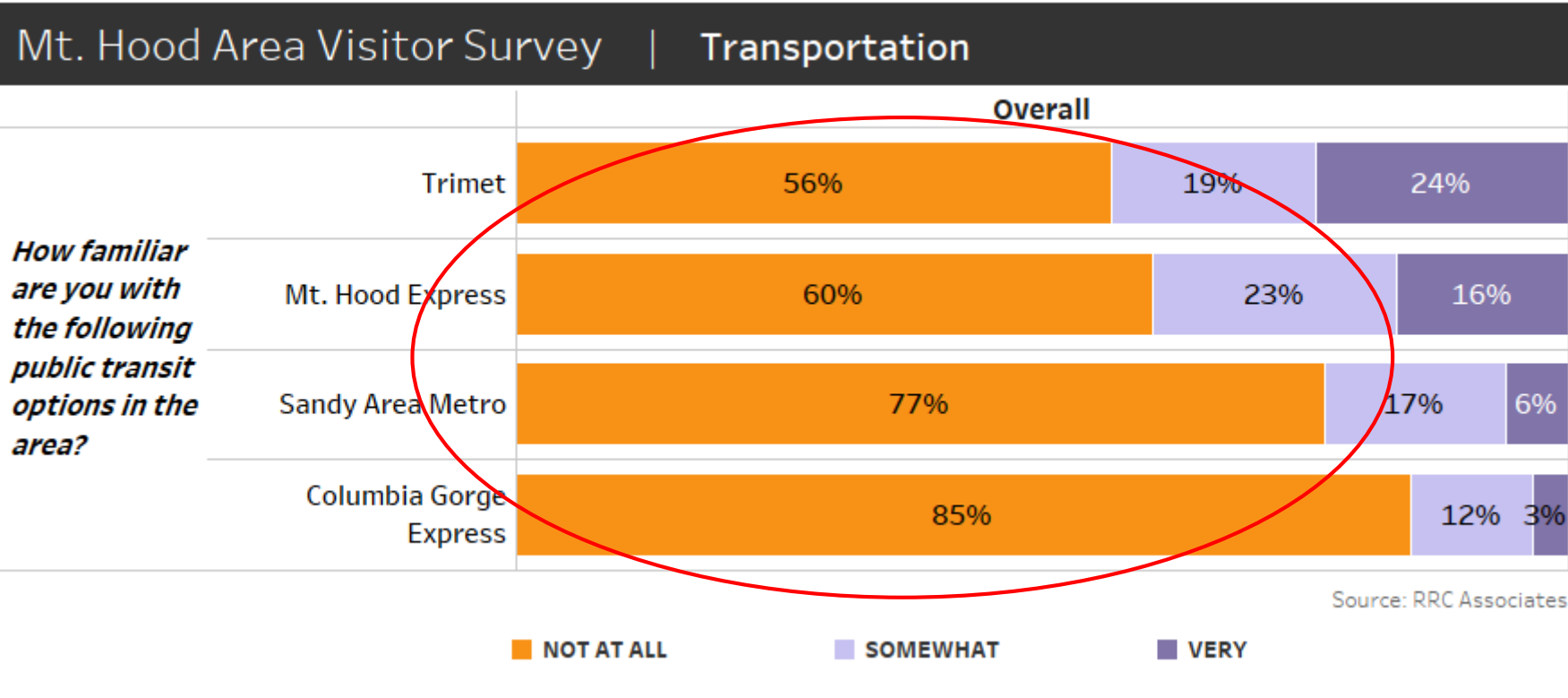
Mt. Hood Area Visitor Survey | Transportation

What, if anything, would most encourage you to take public transportation when traveling in this area in the future? (MARK ALL THAT APPLY)



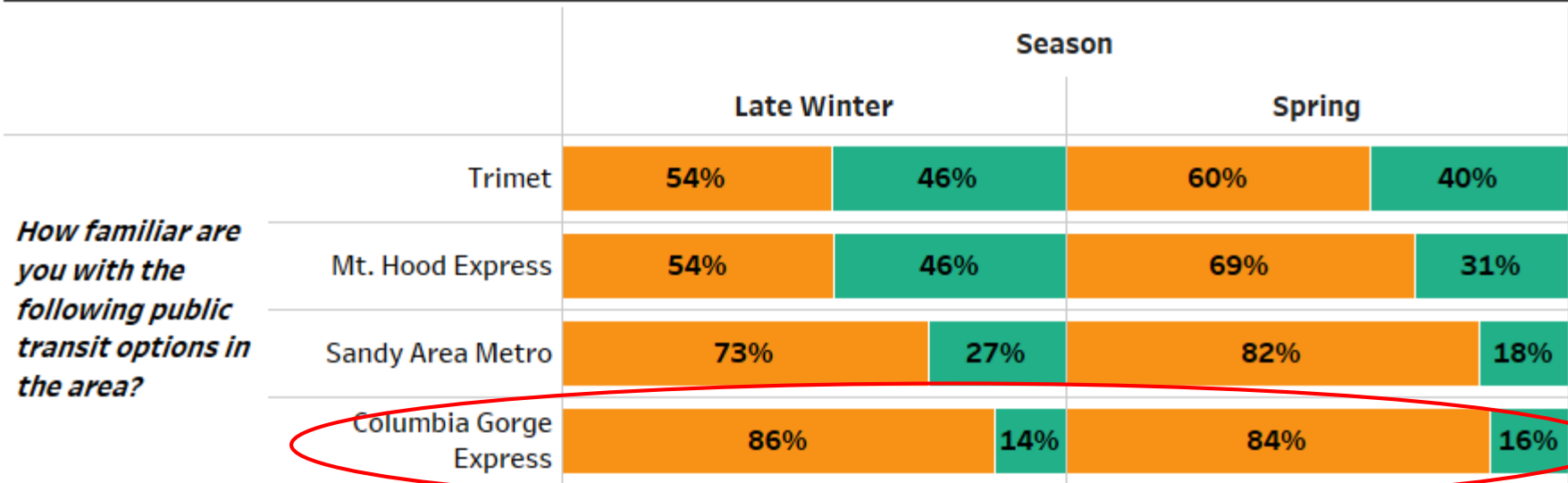
Source: RRC Associates

FAMILIARITY WITH TRANSIT OPTIONS



FAMILIARITY WITH TRANSIT OPTIONS BY SEASON

Mt. Hood Area Visitor Survey | Transportation



Source: RRC Associates

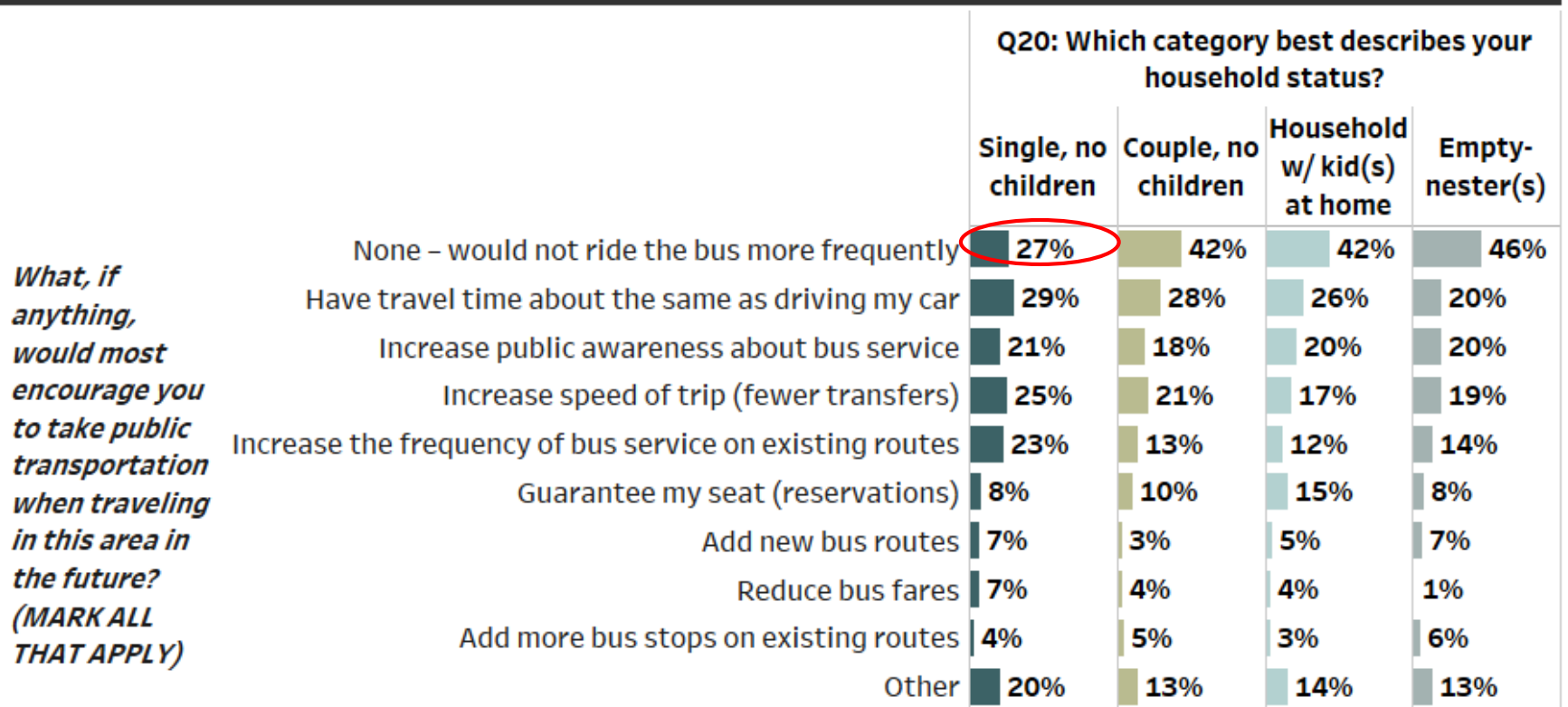
■ NOT AT ALL ■ SOMEWHAT OR VERY

FOCUS ON
PROMOTING
TRANSPORTATION
OPPORTUNITIES
TO VISITOR
SEGMENTS THAT
ARE MORE OPEN
TO TAKING
PUBLIC
TRANSPORTATION
IN THE FUTURE.



FACTORS THAT WOULD INCREASE UTILIZATION OF PUBLIC TRANSIT BY HOUSEHOLD TYPE

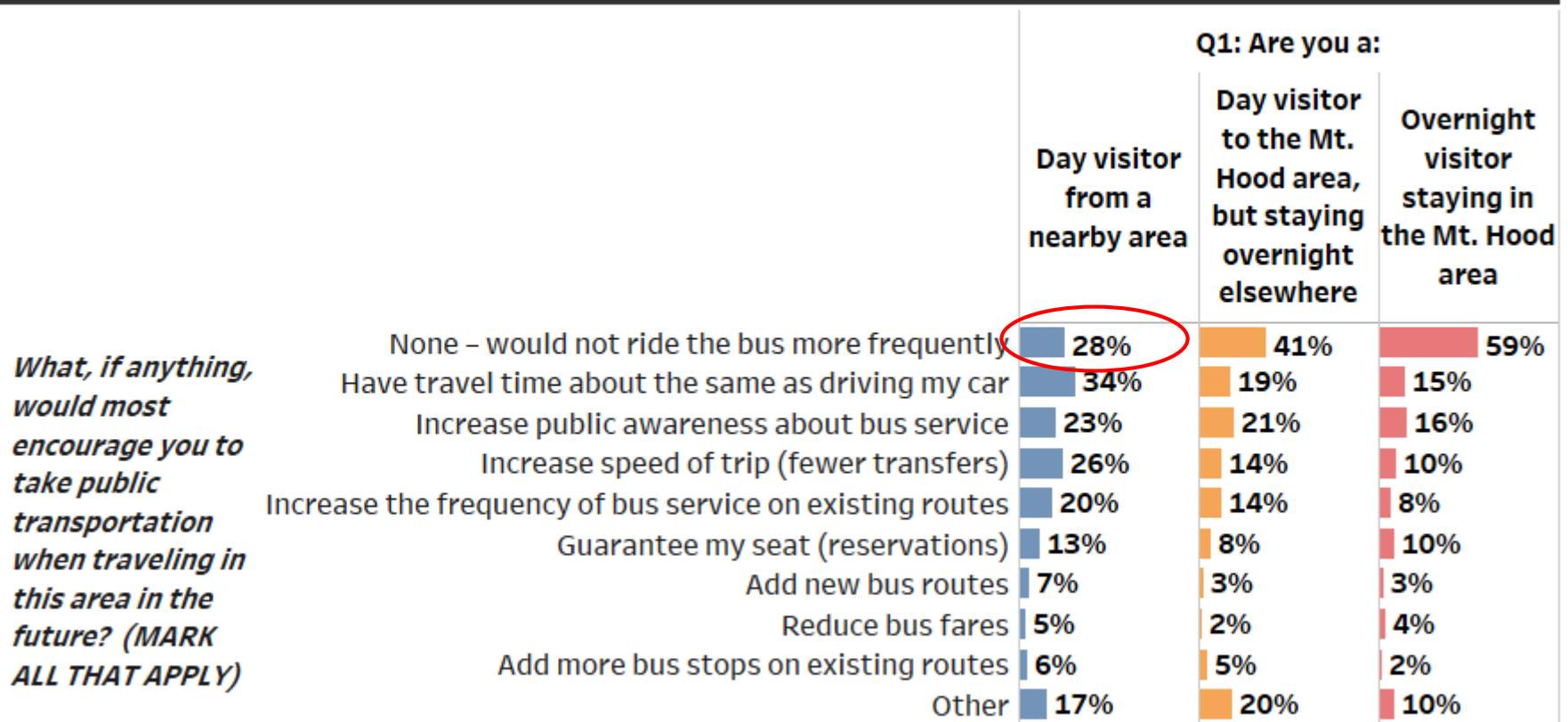
Mt. Hood Area Visitor Survey | Transportation



Source: RRC Associates

FACTORS THAT WOULD INCREASE UTILIZATION OF PUBLIC TRANSIT BY VISITOR TYPE

Mt. Hood Area Visitor Survey | Transportation



Source: RRC Associates

Note: Seasonal residents aren't included in the graph above due to a small sample size.

FACTORS THAT WOULD INCREASE UTILIZATION OF PUBLIC TRANSIT BY SEASON

Mt. Hood Area Visitor Survey | Transportation

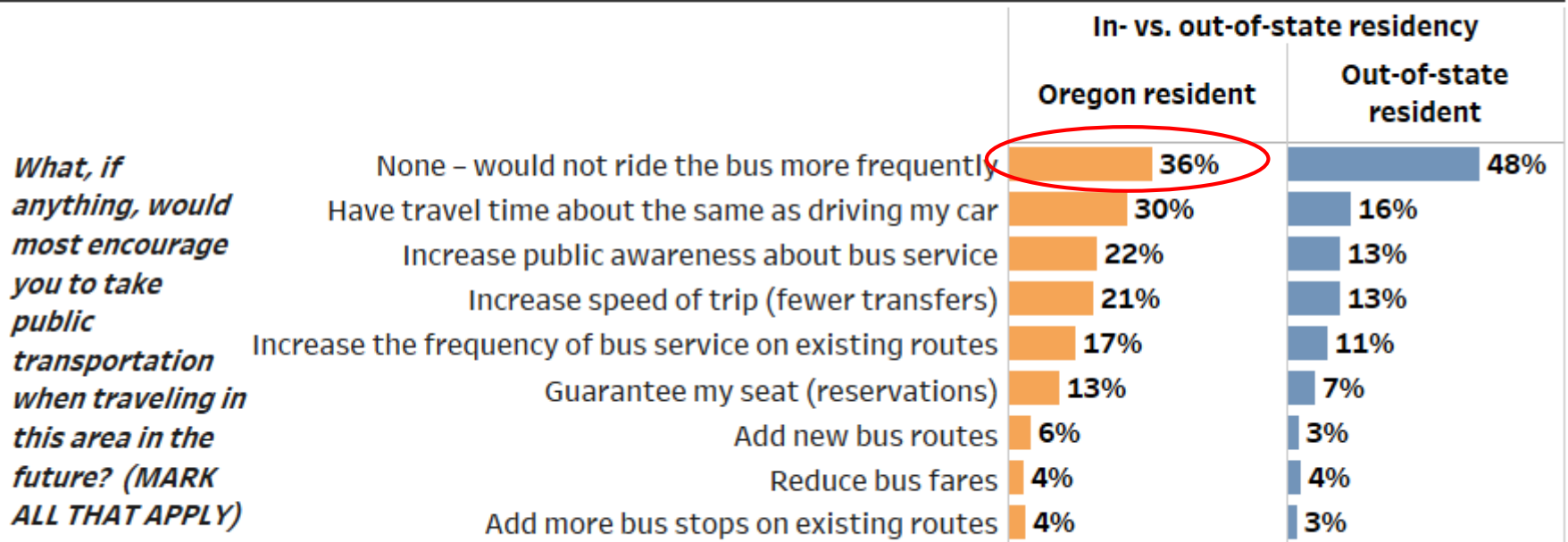
What, if anything, would most encourage you to take public transportation when traveling in this area in the future? (MARK ALL THAT APPLY)

	Season	
	Late Winter	Spring
None – would not ride the bus more frequently	28%	57%
Have travel time about the same as driving my car	32%	18%
Increase public awareness about bus service	22%	17%
Increase speed of trip (fewer transfers)	25%	12%
Increase the frequency of bus service on existing routes	21%	7%
Guarantee my seat (reservations)	14%	8%
Add new bus routes	7%	3%
Reduce bus fares	5%	4%
Add more bus stops on existing routes	5%	3%
Other	16%	14%

Source: RRC Associates

FACTORS THAT WOULD INCREASE UTILIZATION OF PUBLIC TRANSIT BY IN- VS. OUT-OF-STATE RESIDENCY

Mt. Hood Area Visitor Survey | Transportation



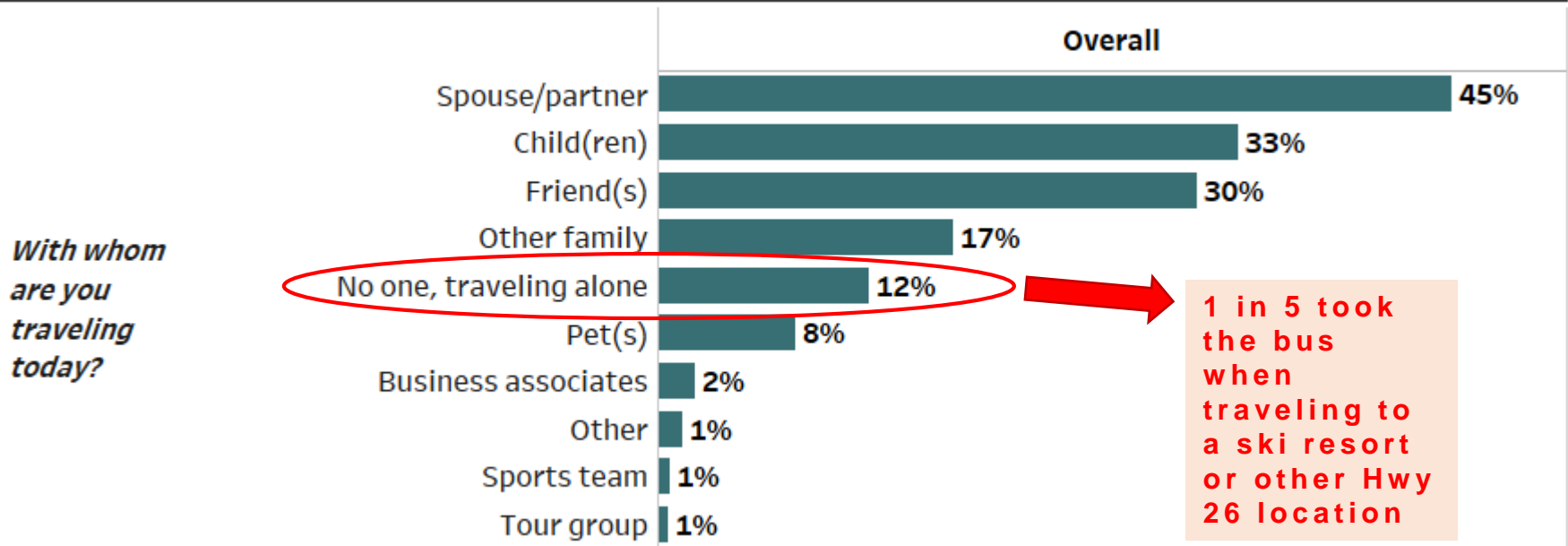
Source: RRC Associates



TO INCREASE
BUS USAGE
AMONG SOLO
TRAVELERS,
FOCUS ON
OPTIMIZING BUS
SERVICE ALONG
HWY 26.

TRAVEL PARTY COMPOSITION

Mt. Hood Area Visitor Survey | Travel Party



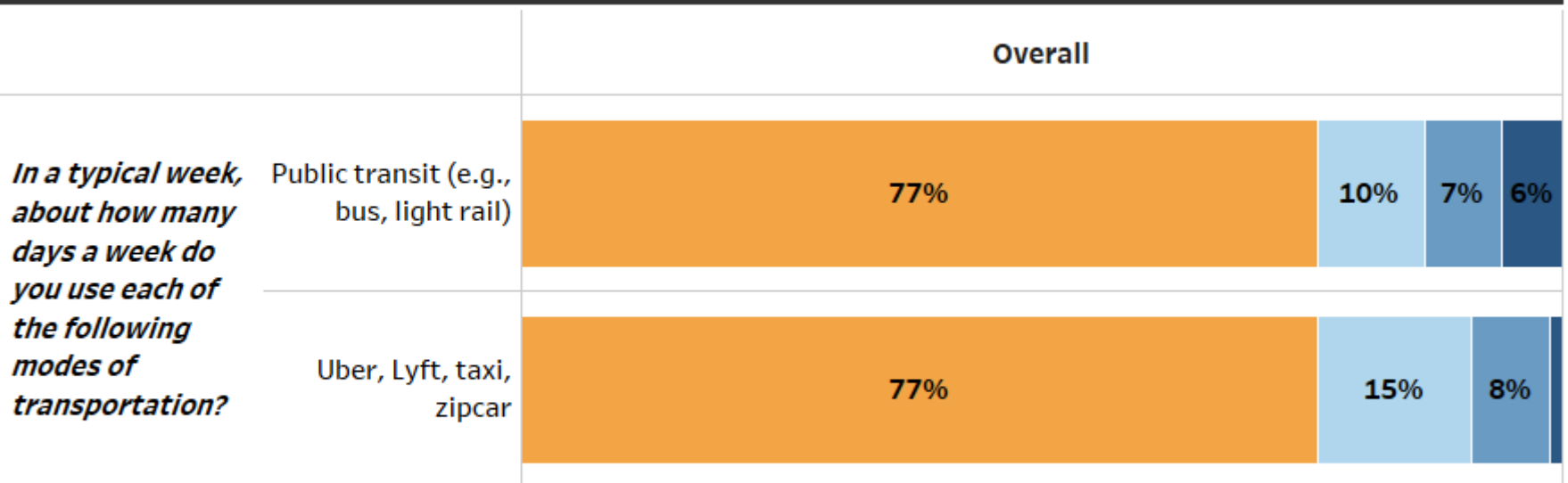
Source: RRC Associates



MARKET TO CURRENT USERS OF PUBLIC TRANSIT AND RIDESHARE.

FREQUENCY OF USAGE OF TRANSPORTATION MODES IN A TYPICAL WEEK

Mt. Hood Area Visitor Survey | Transportation



Source: RRC Associates

None

1

2-4

5-7

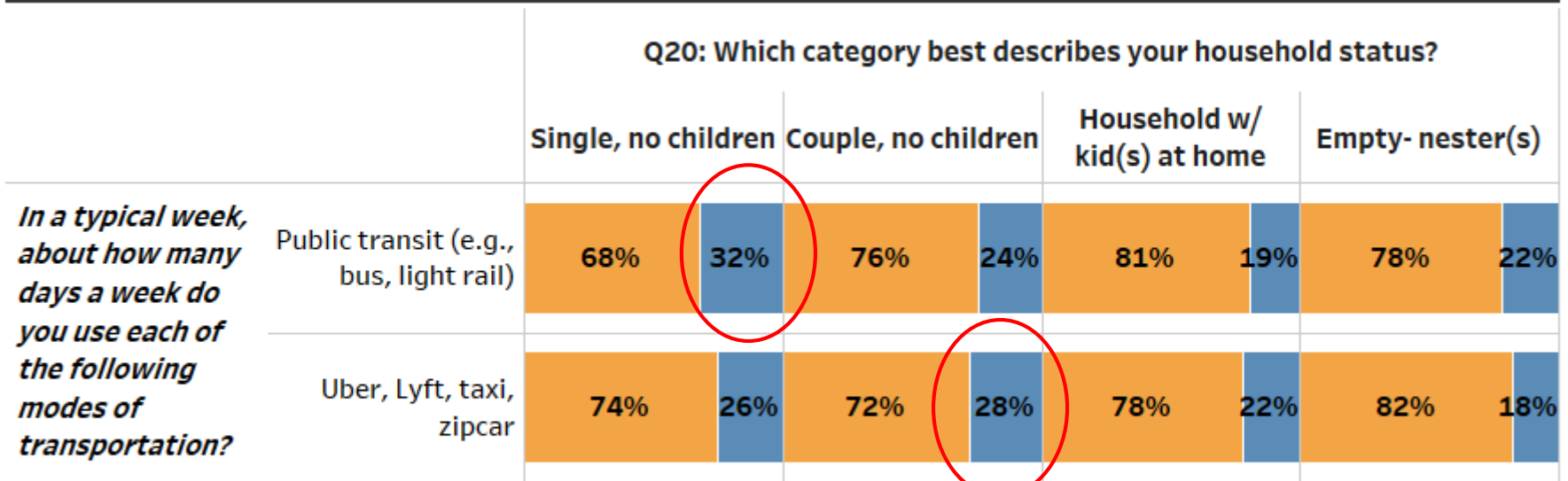


- Current users more open to taking public transit in the Mt. Hood area
- More likely to desire increased frequency of service on existing routes

FREQUENCY OF USAGE OF TRANSPORTATION MODES IN A TYPICAL WEEK BY HOUSEHOLD TYPE

Mt. Hood Area Visitor Survey | Transportation

Q20: Which category best describes your household status?



Source: RRC Associates

None

At Least Once a Week

FREQUENCY OF USAGE OF TRANSPORTATION MODES IN A TYPICAL WEEK BY HOUSEHOLD INCOME

Mt. Hood Area Visitor Survey | Transportation

Q25: Which of the following categories best describes the annual income of your household (before taxes)?

\$0 to \$49,999

\$50,000 to \$99,999

\$100,000 to \$199,999

\$200,000 or more

In a typical week, about how many days a week do you use each of the following modes of transportation?

Public transit (e.g., bus, light rail)

Uber, Lyft, taxi, zipcar

69%

31%

75%

25%

77%

23%

88%

12%

82%

18%

78%

22%

75%

25%

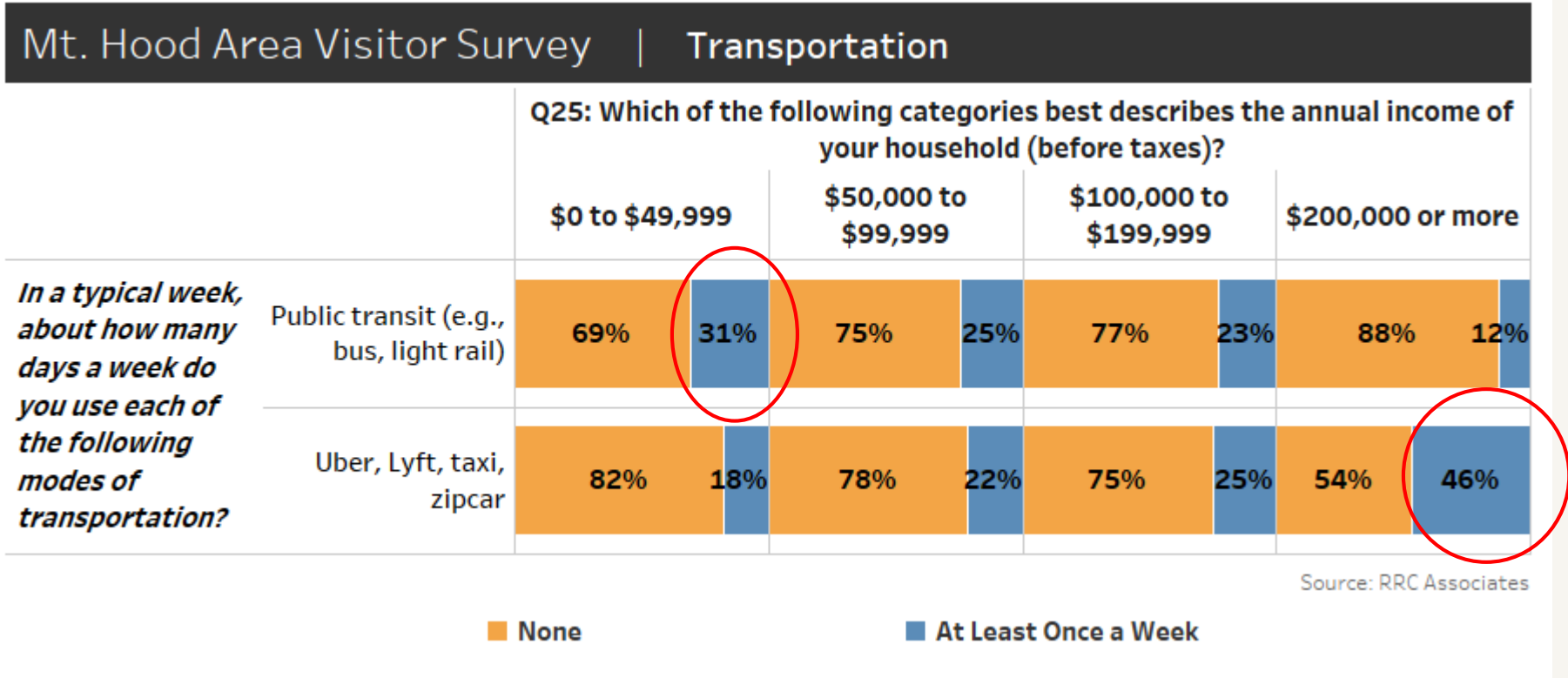
54%

46%

None

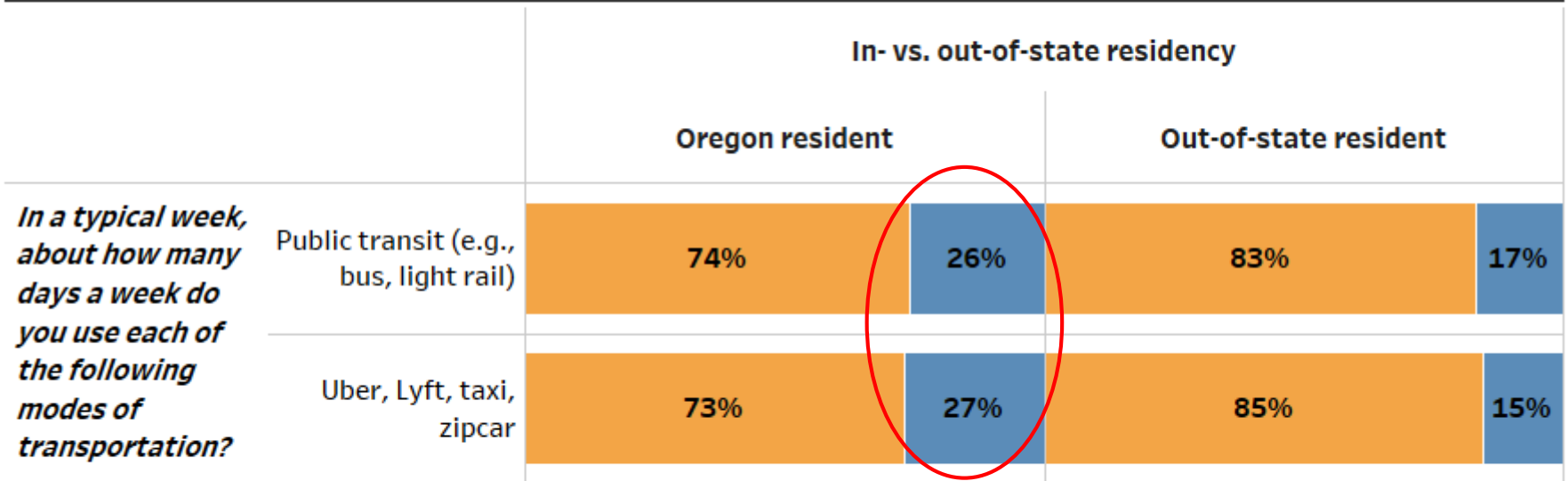
At Least Once a Week

Source: RRC Associates



FREQUENCY OF USAGE OF TRANSPORTATION MODES IN A TYPICAL WEEK BY IN- VS. OUT-OF-STATE RESIDENCY

Mt. Hood Area Visitor Survey | Transportation



Source: RRC Associates

None

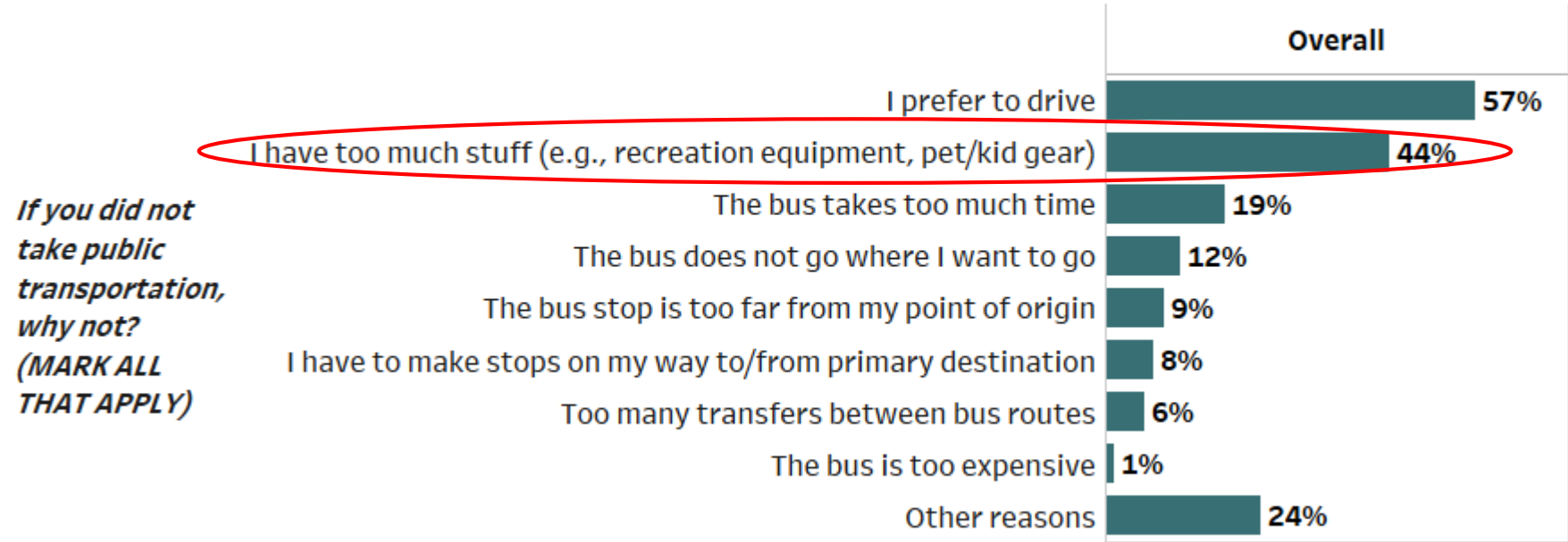
At Least Once a Week

IMPROVE GEAR STORAGE OPTIONS ON PUBLIC TRANSIT.



BARRIERS TO TAKING PUBLIC TRANSPORTATION

Mt. Hood Area Visitor Survey | Transportation



If you did not take public transportation, why not? (MARK ALL THAT APPLY)

Source: RRC Associates

TRIP PURPOSE

Mt. Hood Area Visitor Survey | Trip Purpose

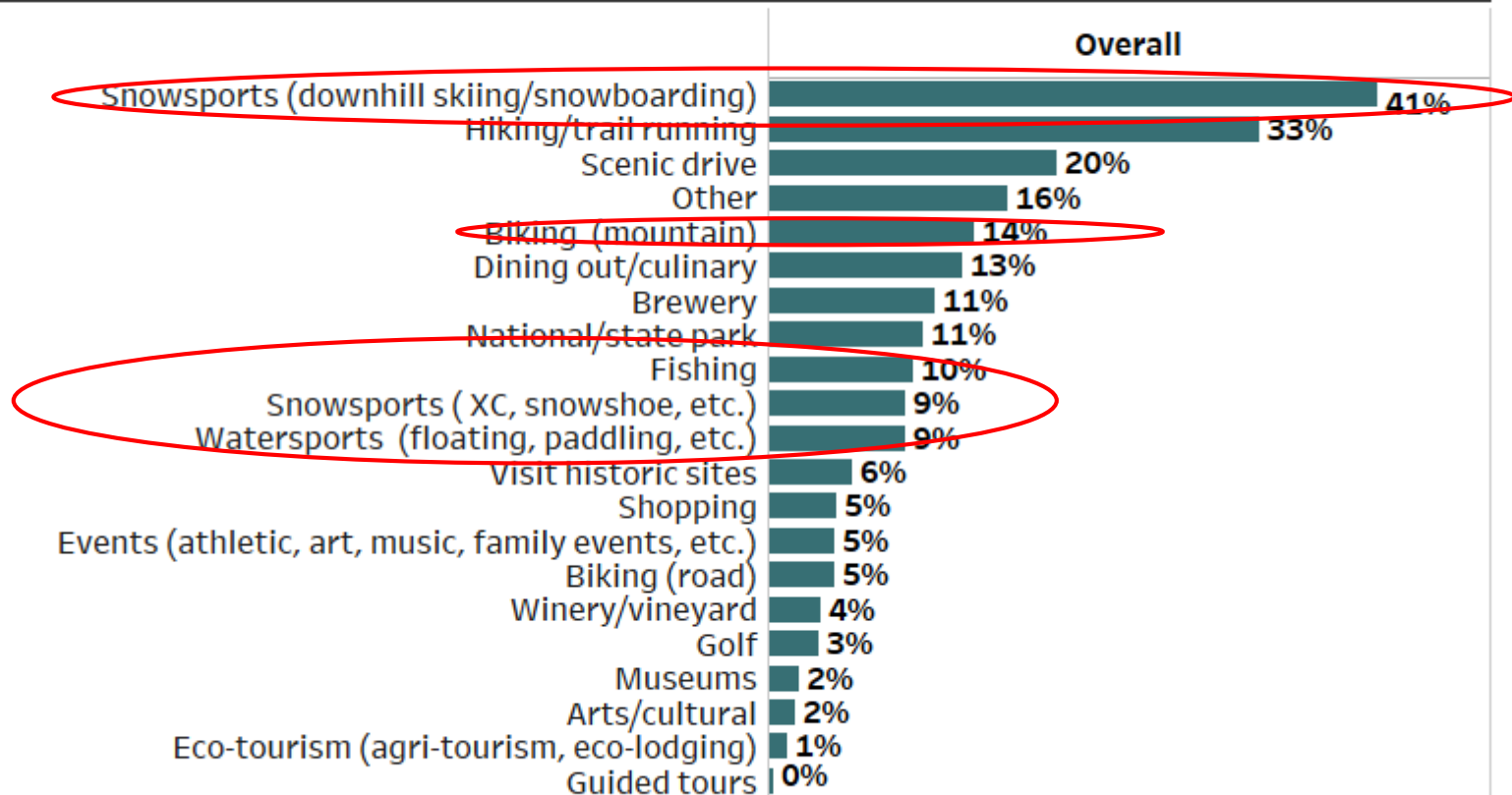


Source: RRC Associates

ACTIVITY PARTICIPATION

Mt. Hood Area Visitor Survey | Activity Participation

What kind of activities did you or will you do while on this trip to the Mt. Hood area? (MARK ALL THAT APPLY)



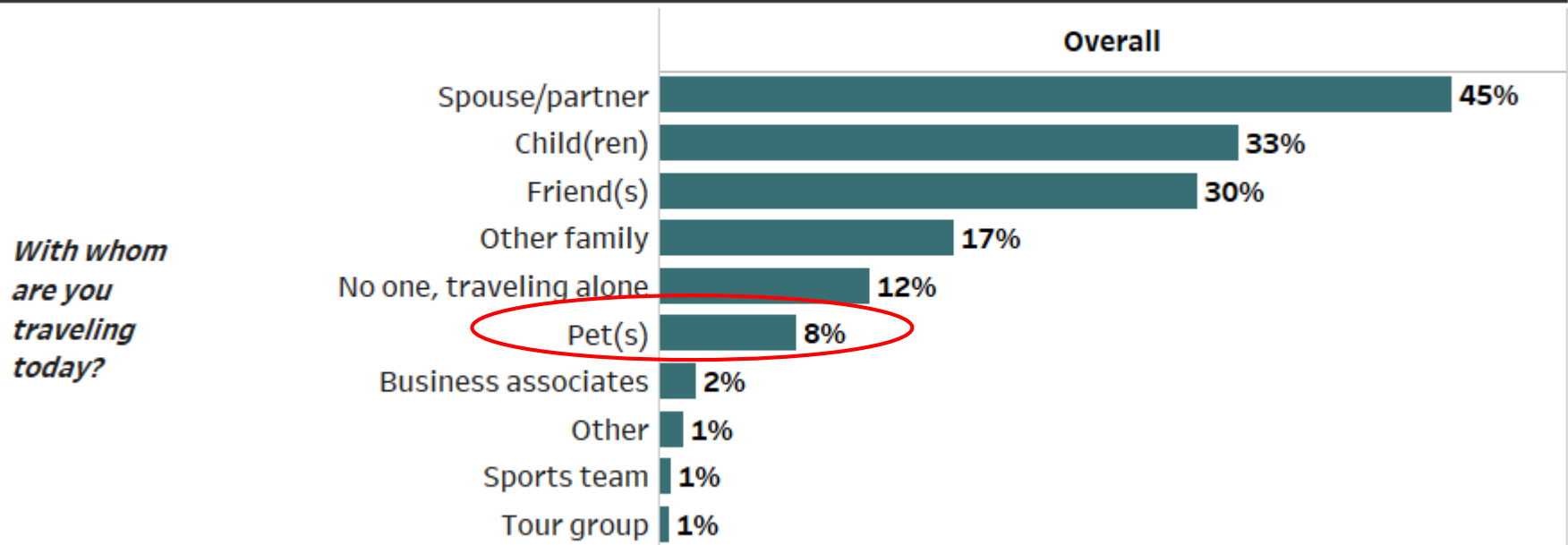
Government Oregon Transportation Needs Interviewer Mountain
Shuttle Beautiful Park Signage Public
Highway Just Need Winter Slow Like Know Friendly
Hiking Better Accidents Now Group Ends Know Like Signage
Driving Things Awesome Welches Subject Long Popular Leave Expand
Lodging Good Free Year Start Please Great Catch Congestion
Today Way Come Limit Well First Dog Transit Mount Road Pass Advertising Service
Area Larger Info Golf Pay Access Trimet Travel Comments
Sports Ski Holes State Buses Trip Help Job Lot Days Skiing Survey Stopped Nobody
River Express Much Summer Town Water Time Purchased Bad Note Pot Can Full Highly Quite Away Note Trail Less Maps Pdx Trash Getting Crowded
Traffic Disc Wish Easy Trail Less Pdx Trails
Meadows Information Remain Frequent Part Cars See Idea Stay Small New Cross Plan Areas People
Use Sandy Stops Keep Working Ride Sure Cheap Real Safe Beauty Visiting Commute Coming Facebook Portland
Many Bike/biking/bikers Ridge Forest Purchase Food Trailheads Couple
Hard Options Roads Always Maintained Weekends

ACCOMMODATE PUBLIC TRANSPORTATION
FOR PETS.



TRAVEL PARTY COMPOSITION

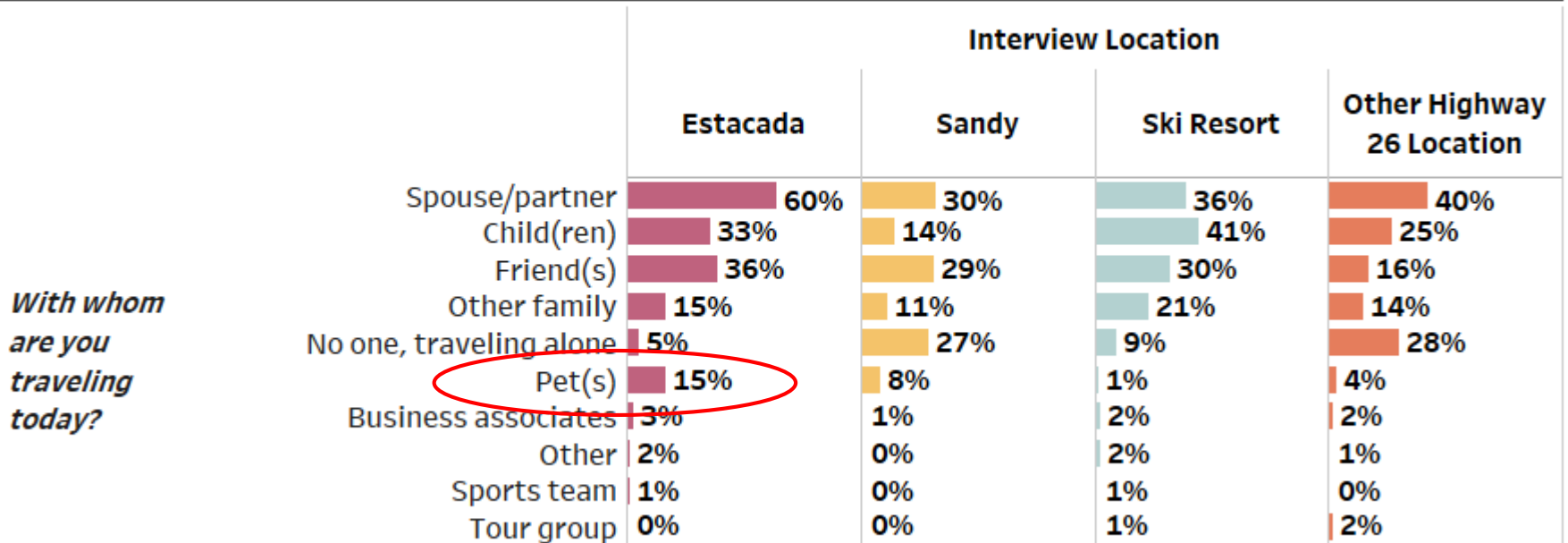
Mt. Hood Area Visitor Survey | Travel Party



Source: RRC Associates

TRAVEL PARTY COMPOSITION BY INTERVIEW LOCATION

Mt. Hood Area Visitor Survey | Travel Party



*With whom
are you
traveling
today?*

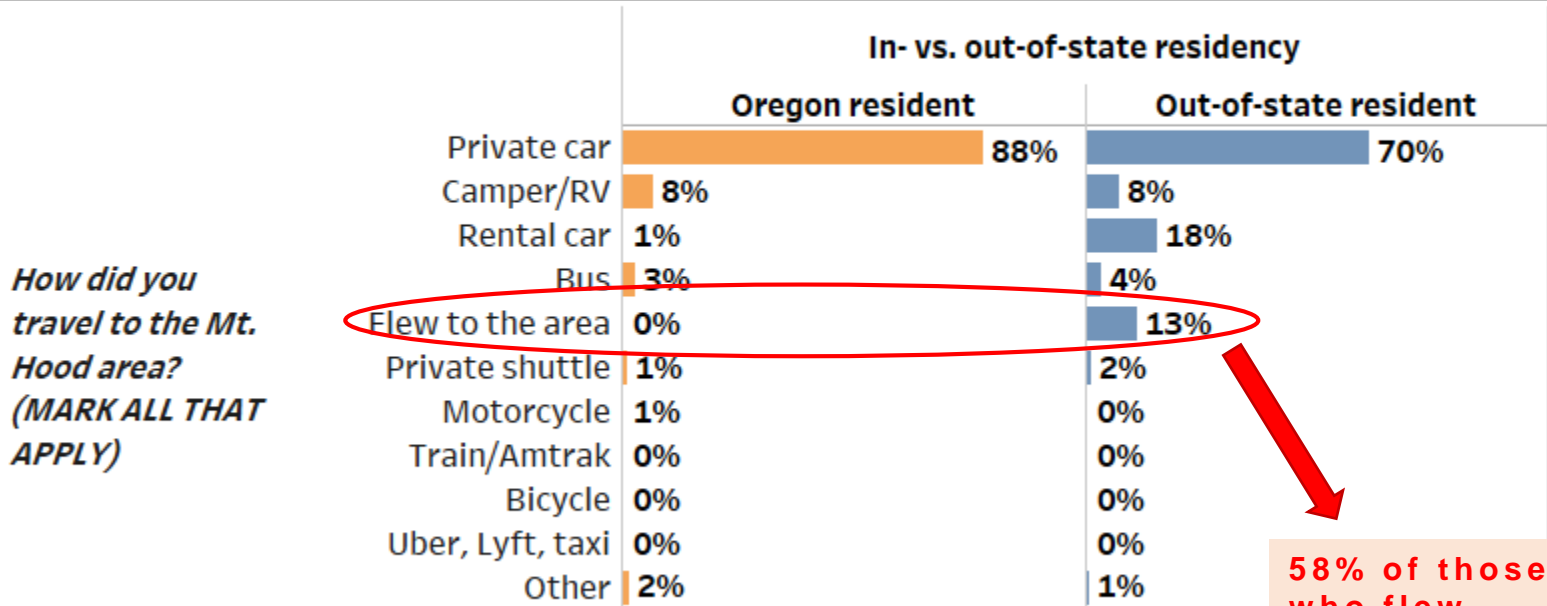
Source: RRC Associates



TRY TO CAPTURE
OUT-OF-STATE
VISITORS WHO
FLEW AND
RENTED A CAR BY
PROVIDING BUS
SERVICE
BETWEEN
PORTLAND AND
GOVERNMENT
CAMP, AND
OFFERING STOPS
NEAR SKI
RESORTS,
TRAILHEADS, AND
RESTAURANTS.

METHOD OF TRAVEL TO THE AREA BY IN- VS. OUT-OF-STATE RESIDENCY

Mt. Hood Area Visitor Survey | Transportation



58% of those who flew rented a car



- Most likely to be visiting Portland and Government Camp
- Participating in hiking/trail running, scenic drives, snowsports, and dining out

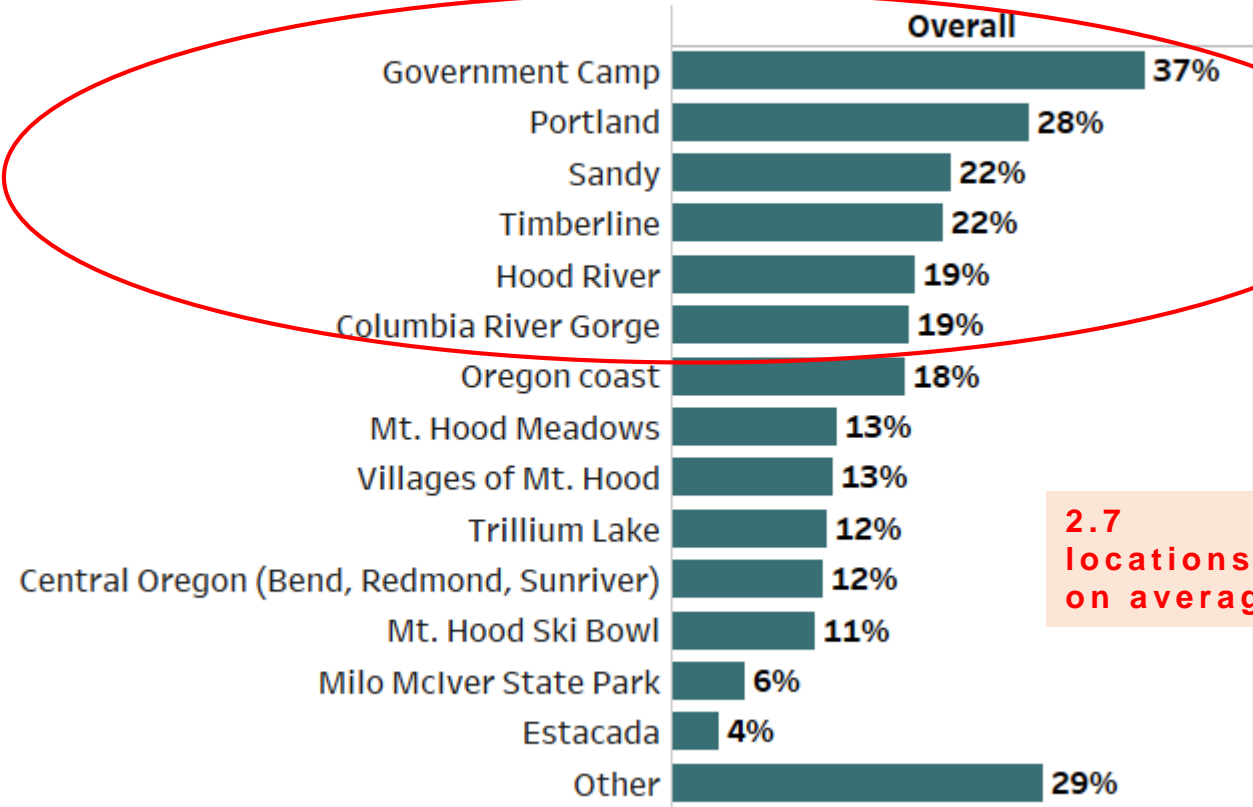
OFFER “HOP ON, HOP OFF” RIDE OPTION WITH ONE EASY, AFFORDABLE TICKET.



LOCATIONS VISITED

Mt. Hood Area Visitor Survey | Locations Visited

Which of the following, if any, have you visited or do you plan to visit during this trip to the Mt. Hood area? (MARK ALL THAT APPLY)



2.7 locations, on average

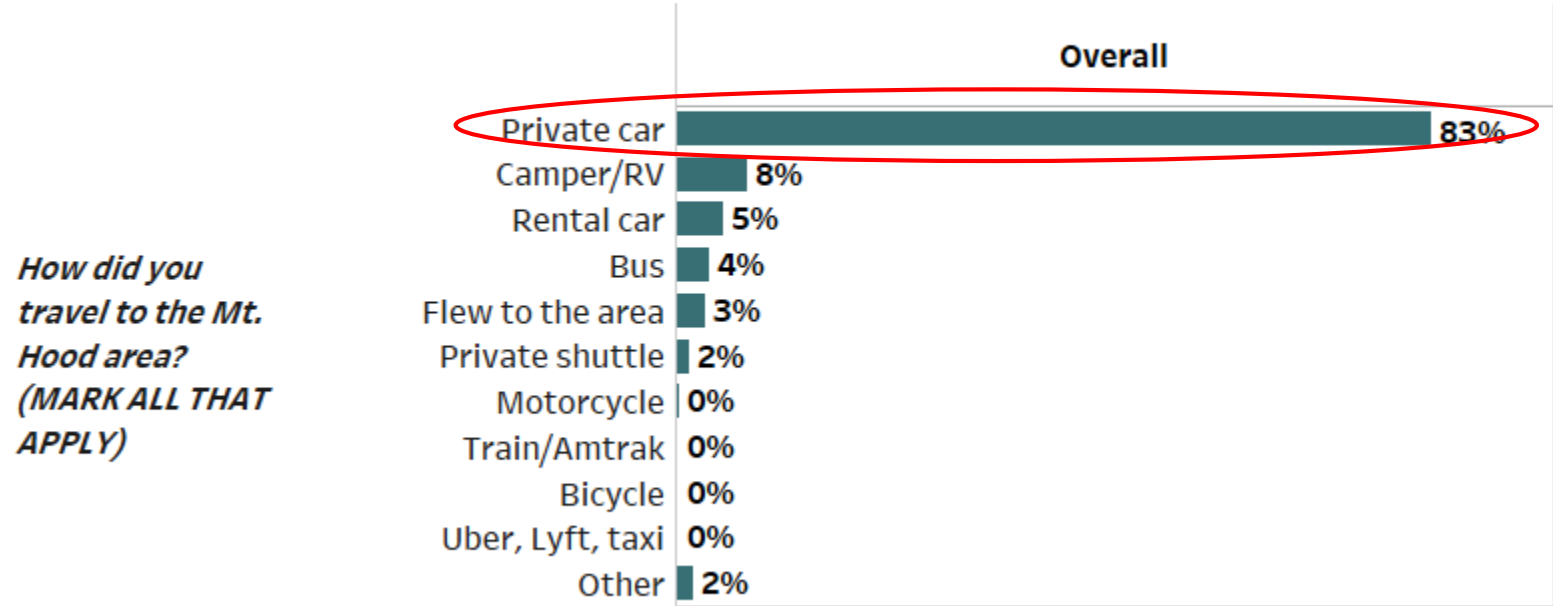
Source: RRC Associates



INCENTIVIZE CARPOOLING WITH PREMIUM PARKING AT TRAILHEADS AND SKI RESORTS.

METHOD OF TRAVEL TO THE AREA

Mt. Hood Area Visitor Survey | Transportation

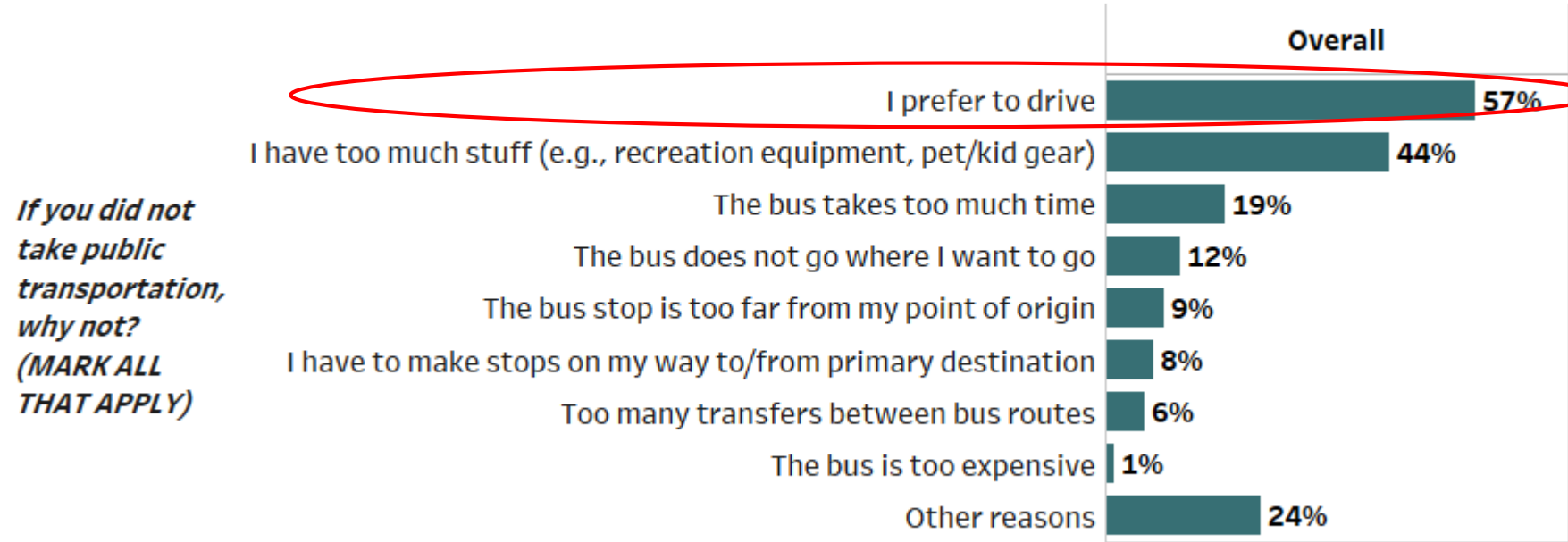


How did you travel to the Mt. Hood area? (MARK ALL THAT APPLY)

Source: RRC Associates

BARRIERS TO TAKING PUBLIC TRANSPORTATION

Mt. Hood Area Visitor Survey | Transportation

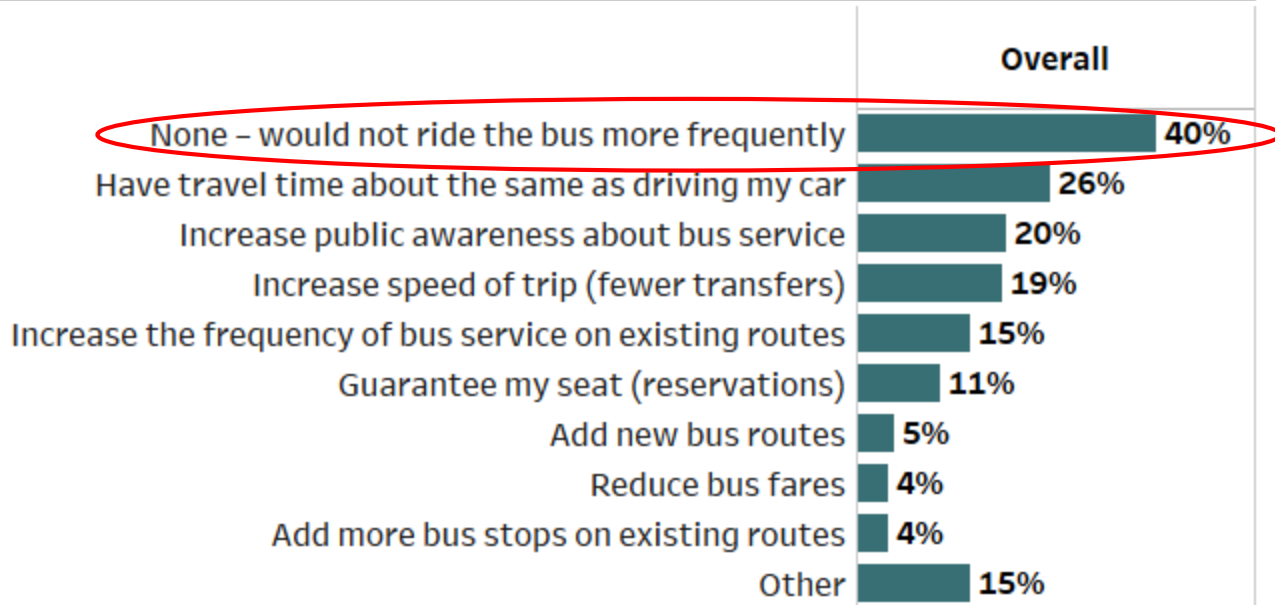


Source: RRC Associates

FACTORS THAT WOULD INCREASE UTILIZATION OF PUBLIC TRANSIT

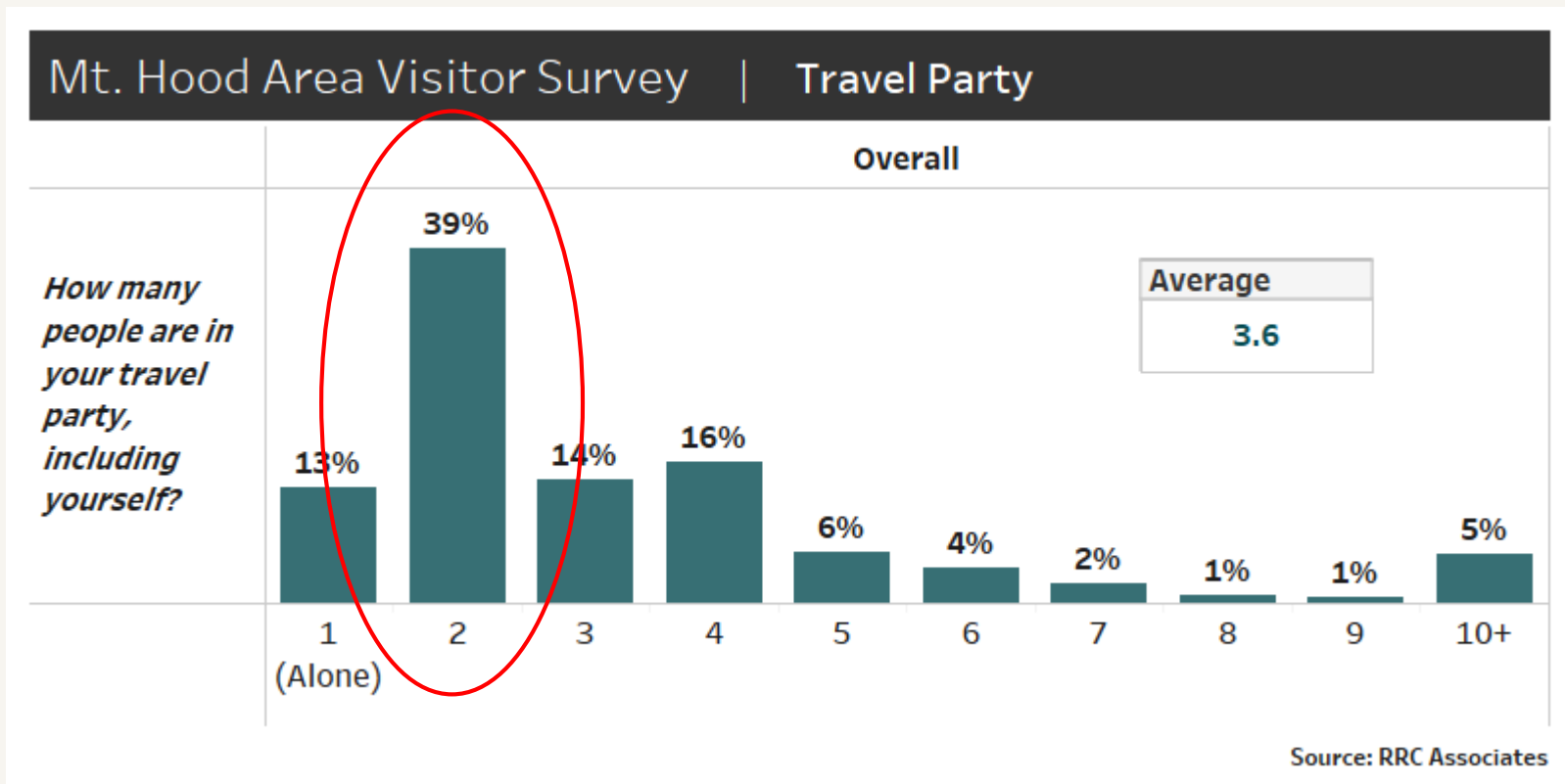
Mt. Hood Area Visitor Survey | Transportation

What, if anything, would most encourage you to take public transportation when traveling in this area in the future? (MARK ALL THAT APPLY)



Source: RRC Associates

TRAVEL PARTY SIZE





IMPROVE SIGNAGE FOR REGIONAL ATTRACTIONS.

- *“Just driving by it’s not clear that Sandy Ridge trailhead is a mbk park.”*
- *“Real time travel alerts needed”*
- *“Better signage; can't see signs in dark”*
- *“More trail hiking signage, more camping and recreational options”*
- *“Roadside signage is inadequate and misleading; other than that wonderful area”*
- *“Signage is better almost everywhere else; signs are small and hard to see”*

TO INCREASE ECONOMIC IMPACT TO THE REGION,
ATTRACT THE VISITORS THAT TEND TO SPEND
MORE WHILE IN THE AREA: SKI RESORT VISITORS,
WINTERTIME VISITORS, OVERNIGHT VISITORS,
OUT-OF-STATE RESIDENTS, AND FAMILIES.



EXPENDITURES

Mt. Hood Area Visitor Survey | Expenditures

		Average
<i>Please estimate how much money you and your immediate travel party will spend in total during your visit in the Mt. Hood area:</i>	Lodging	\$97
	Recreation / entertainment / activities (skiing, movies, concerts, events, sightseeing, other recreational activities)	\$76
	Food & drinks (restaurants, bars)	\$75
	Other items (gas, parking)	\$28
	Shopping/retail (souvenirs, gifts, wine by the bottle)	\$16
	Total spend per party for entire trip	\$285

EXPENDITURES BY INTERVIEW LOCATION

Mt. Hood Area Visitor Survey | Expenditures

		Average			
		Estacada	Sandy	Ski Resort	Other Highway 26 Location
<i>Please estimate how much money you and your immediate travel party will spend in total during your visit in the Mt. Hood area:</i>	Lodging	\$67	\$37	\$130	\$136
	Recreation / entertainment / activities	\$17	\$19	\$150	\$53
	Food & drinks	\$69	\$47	\$90	\$64
	Other items (gas, parking)	\$41	\$20	\$25	\$8
	Shopping/retail	\$19	\$20	\$17	\$3
	Total spend per party for entire trip	\$210	\$145	\$405	\$224

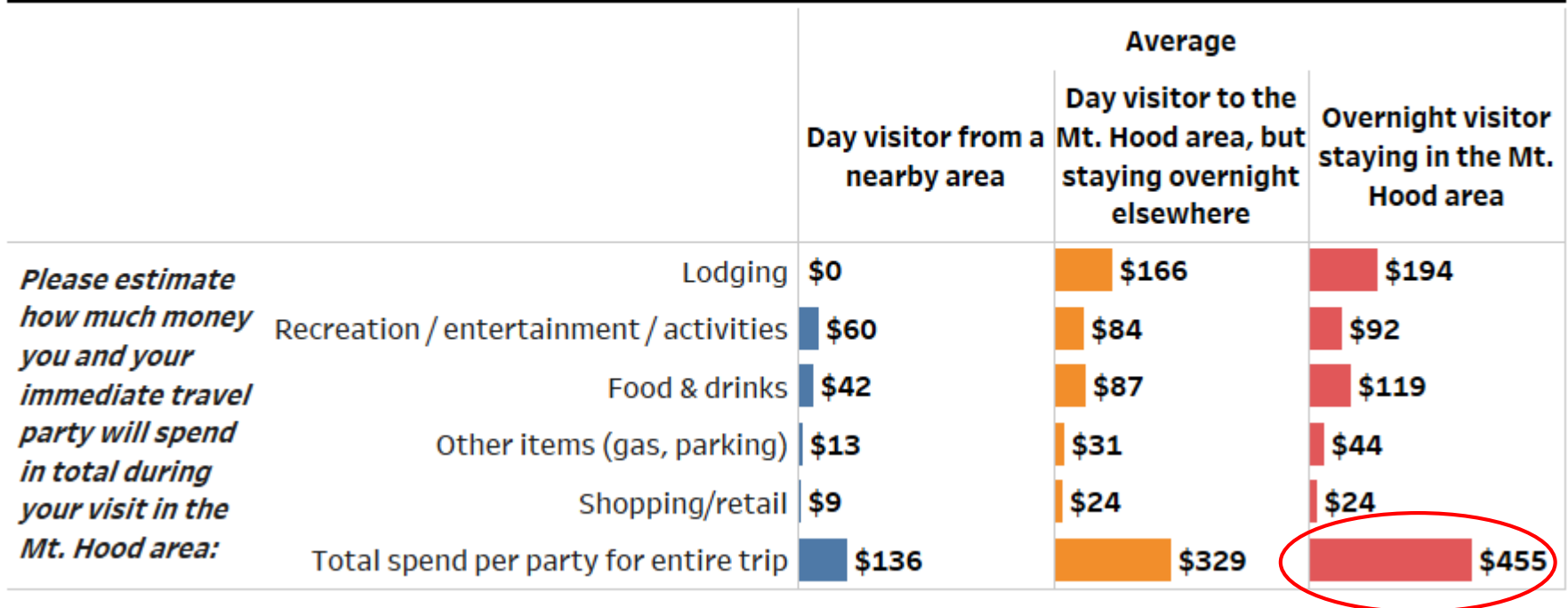
EXPENDITURES BY SEASON

Mt. Hood Area Visitor Survey | Expenditures

		Average	
		Late Winter	Spring
<i>Please estimate how much money you and your immediate travel party will spend in total during your visit in the Mt. Hood area:</i>	Lodging	\$88	\$111
	Recreation / entertainment / activities	\$96	\$46
	Food & drinks	\$70	\$82
	Other items (gas, parking)	\$26	\$31
	Shopping/retail	\$16	\$17
	Total spend per party for entire trip	\$295	\$271

EXPENDITURES BY VISITOR TYPE

Mt. Hood Area Visitor Survey | Expenditures

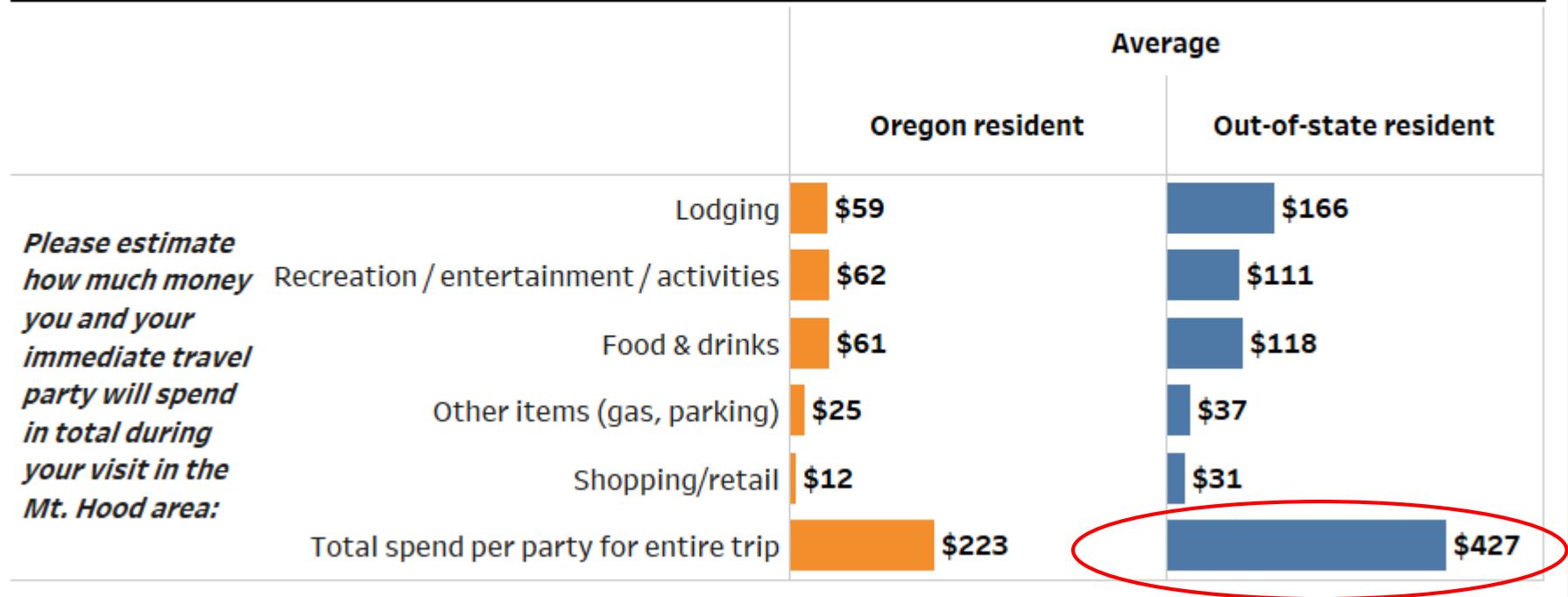


Note: Seasonal residents aren't included in the graph above due to a small sample size.

EXPENDITURES

BY IN- VS. OUT-OF-STATE RESIDENCY

Mt. Hood Area Visitor Survey | Expenditures



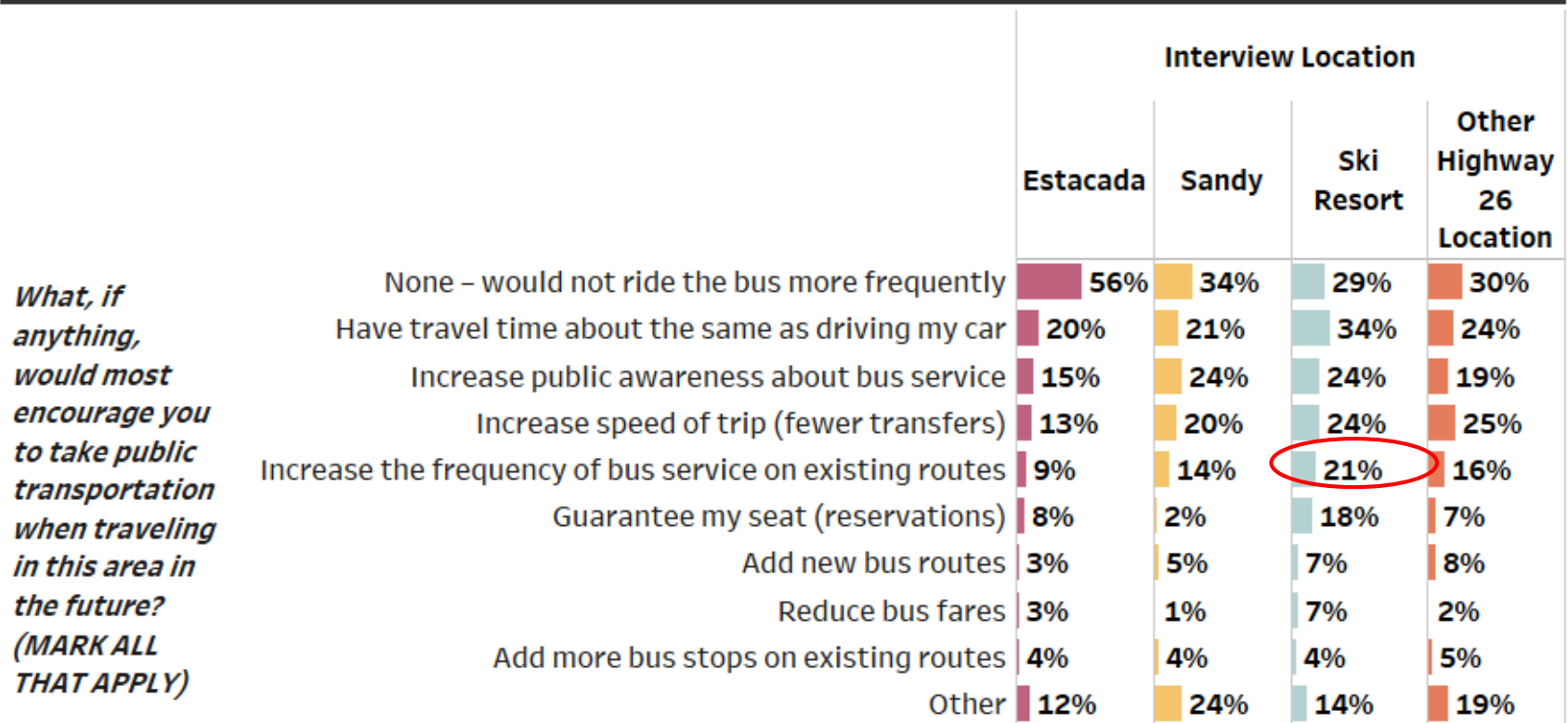
EXPENDITURES BY HOUSEHOLD TYPE

Mt. Hood Area Visitor Survey | Expenditures

		Average			
		Single, no children	Couple, no children	Household w/ kid(s) at home	Empty-nester(s)
<i>Please estimate how much money you and your immediate travel party will spend in total during your visit in the Mt. Hood area:</i>	Lodging	\$64	\$90	\$133	\$71
	Recreation / entertainment / activities	\$77	\$50	\$99	\$48
	Food & drinks	\$58	\$77	\$85	\$73
	Other items (gas, parking)	\$29	\$34	\$28	\$18
	Shopping/retail	\$16	\$16	\$18	\$12
	Total spend per party for entire trip	\$242	\$260	\$355	\$212

FACTORS THAT WOULD INCREASE UTILIZATION OF PUBLIC TRANSIT BY HOUSEHOLD TYPE

Mt. Hood Area Visitor Survey | Transportation

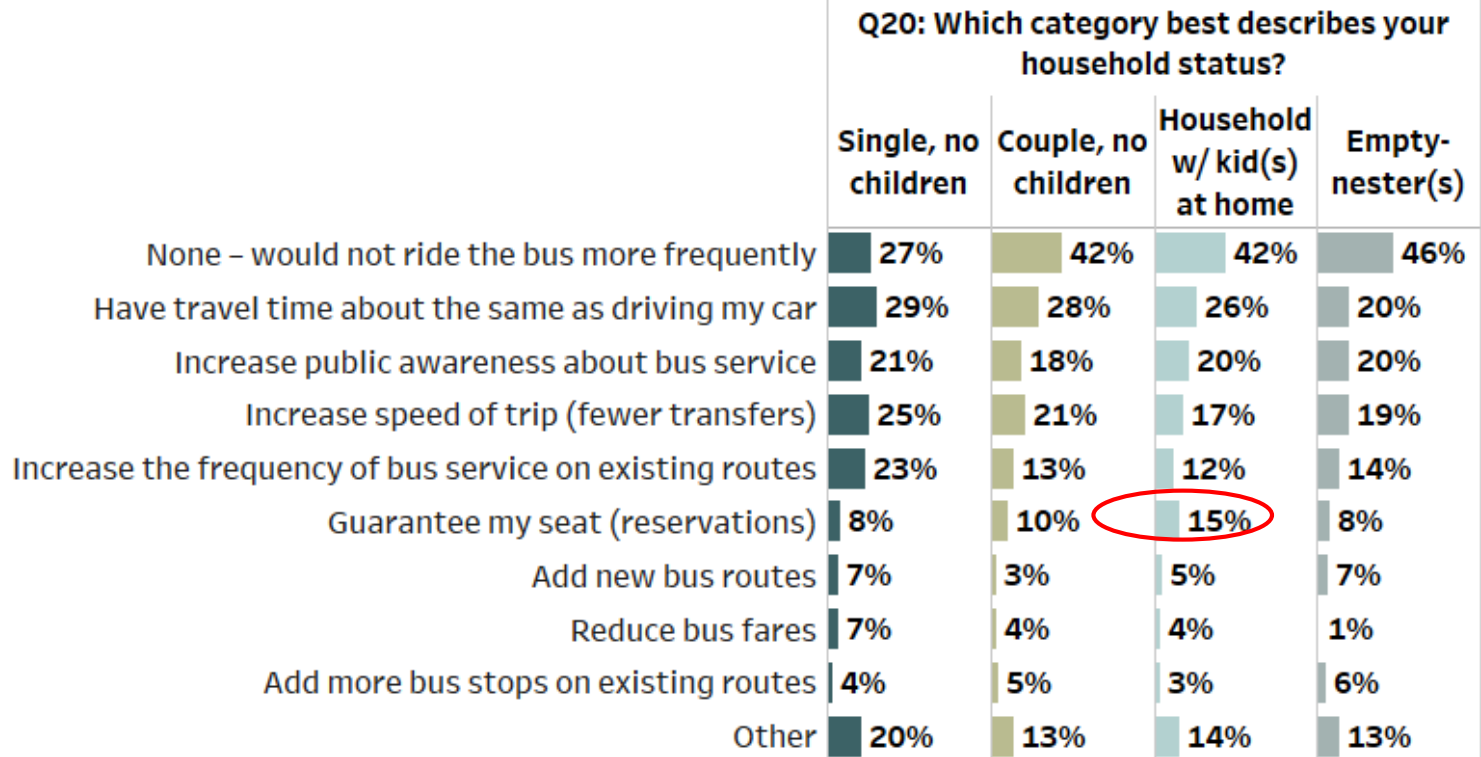


Source: RRC Associates

FACTORS THAT WOULD INCREASE UTILIZATION OF PUBLIC TRANSIT BY HOUSEHOLD TYPE

Mt. Hood Area Visitor Survey | Transportation

What, if anything, would most encourage you to take public transportation when traveling in this area in the future? (MARK ALL THAT APPLY)



Source: RRC Associates

An aerial photograph of a meandering river flowing through a grassy field. The river is dark blue/black in color and winds across the landscape. The surrounding area is covered in green grass and scattered trees and shrubs. The text "Thank you" is overlaid in white in the upper middle section of the image.

Thank you

Questions?