



# Table of Contents

Page 5    Research Methodology

Page 11    Executive Summary

Page 25    Top Insights

Page 37    Appendix

Page 38    Central Oregon Cities & Travel

Page 48    Activities Overview

Page 56    Activities Subtopics Search Detail



# Why Study the Way We Search?





# Tapping into the World's Largest Focus Group

“ As millions of us look for answers to questions, or things to buy, or places to meet friends, our searches produce a map of our collective hopes, fears, and desires. ”

~ *Hidden Brain Podcast*

# Research Methodology

# Research Methodology

WEEK 1



NON-BRAND US  
KEYWORD RESEARCH

WEEK 2



KEYWORD ORGANIZATION  
INTO CATEGORIES, TOPICS  
& SUBTOPICS

WEEK 3-4



ANALYZE KEYWORD DATA  
(DATA MODELING)

WEEK 5-6



IDENTIFY WHAT'S  
IMPORTANT TO THE  
SEARCHER & THE  
OPPORTUNITY



# Terminology

**Keyword** - a word or phrase that searchers type into Google. Examples: *warm springs golf course, sisters campgrounds, biking bend or*

**Emerging Keyword** - A keyword that started to register search volume of at least ten monthly searches in the last 12 months, that did not have any search volume in the previous 12 months.

**Topic & Subtopic** - A topic will have more than one subtopic. Topics and subtopics have multiple keywords assigned to each. For example the topic of Food/Drink/Weed has multiple subtopics of Restaurants, Dispensary, Food, Beer. Each subtopic has multiple keywords, including: *dispensary bend or, restaurants in bend, wineries in central oregon, redmond breakfast, etc.* Keywords can live in more than one topic and subtopic. The keyword sunriver golf resort would live in the subtopic of "Sunriver", "Golf", and "Resort".

**Monthly Search Volume** - the average number of monthly searches for a keyword, subtopic, or topic (which has multiple keywords in each) in the United States.

**YoY Growth** - Growth percentages are added throughout the presentation on various bar charts or noted in the insights. These percentage numbers are for a group of keywords in a subtopic or topic, which takes the average of the group of keywords from the last 12 months (September 2019 – August 2020) compared to the previous 12 months (September 2018 – August 2019). This view can show how part of a year with a global pandemic compares to a year without a global pandemic and how the pandemic is changing searcher behavior.

**4 Year Seasonality** - For every keyword, we looked at four years of search data by month to understand when searches are more prominent or less prominent for a keyword or topic. Searcher seasonality is limited to average monthly search volume with at least 70 monthly searches.

**Non-Brand** - We mentioned that this is a non-brand landscape, meaning we did not include individual business names or attractions like Mt. Bachelor, Chow, The Oxford, etc., however, some keywords may have a brand intent like "*sunriver resorts*".

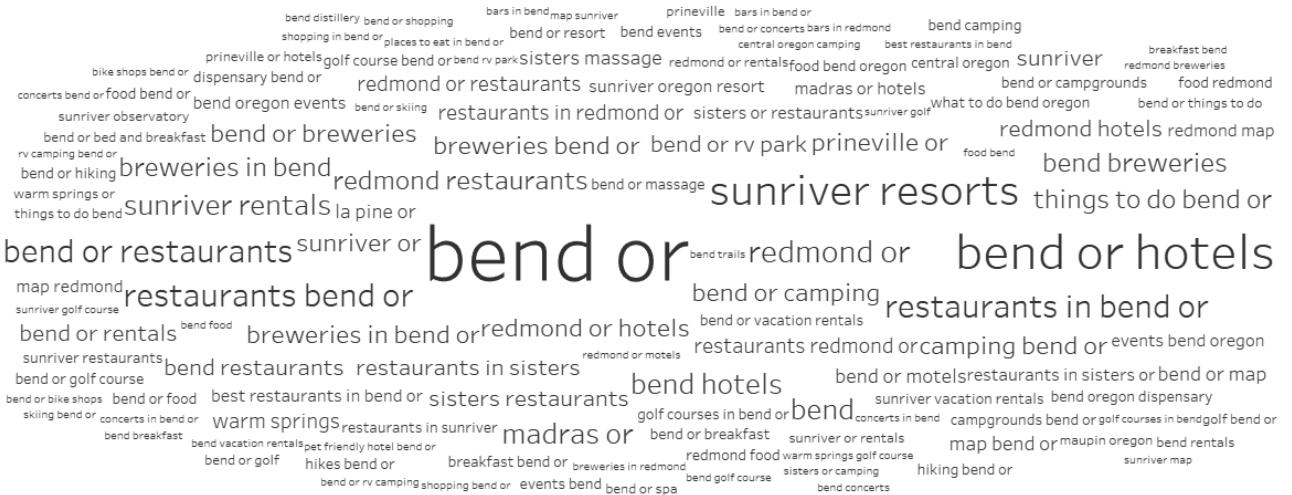


# Non-brand US Keyword Research

We researched the language of the searcher around traveling and activities to Central Oregon and cities within including Bend, Redmond, Sunriver, Sisters, Madras, Prineville, Warm Springs, Central Oregon, La Pine, and Maupin.

We then worked with a cartesian tool to gather over 20,000 keywords for activities and travel language. All non-brand keywords around Central Oregon activities and travel language (not specific businesses or specific locations)

We ran these 20,000+ keywords through Google Keyword planner to give us 1,500+ keywords with search volume.





# Categorization

Category Topic Subtopics	Central Oregon Cities				CO Vacation Travel			
	Cities/Areas		Accommodations	Tours, Guides, & Maps	Travel Language			
	Bend		Hotel	Trail/Map	Rental			
Redmond		Camping	Things to Do	Vacation				
Sunriver		Resort	Activities/Attractions	Package				
Sisters		Vacation Rental	Tour	Fly/Drive To				
Madras		RV	Guide	Travel				
Prineville		Motel						
Warm Springs		Cabin						
Central Oregon		B&B						
La Pine		Accommodation						
Maupin								

Central Oregon Activities												
Food/Drink/Weed	Hikes & Bikes	Golf & Disc Golf	Events	Relaxation	Shops & Casino	Adventure	Winter Sports	Boats & Floats	Hunting / Fishing	Art & Science	Aerial	
Restaurant/Pub	Hiking & Waterfalls	Golf	Event	Facial/Massage	Shopping	Rafting	Skiing	Floating	Fishing	Observatory	Hot Air Balloon	
Beer	Biking/Cycling	Disc Golf	Concert	Spa	Casino	Horseback Riding	Ice Skating	Kayak/Canoeing	Fly Fishing	Museum	Helicopter	
Food	Mountain Biking		Festival	Hot Spring		Caves	Snowshoeing	SUP	Hunting	Rockhounding		
Breakfast				Scenic Drive		Skatepark	Cross Country Skiing	Boating		Art Gallery		
Dispensary						ATV/Off Road	Sledding					
Wine						Rock Climbing	Dog Sledding					
Lunch						Ziplining						
Dinner						Skydiving	Snowboarding					
Distillery												
Drinks												



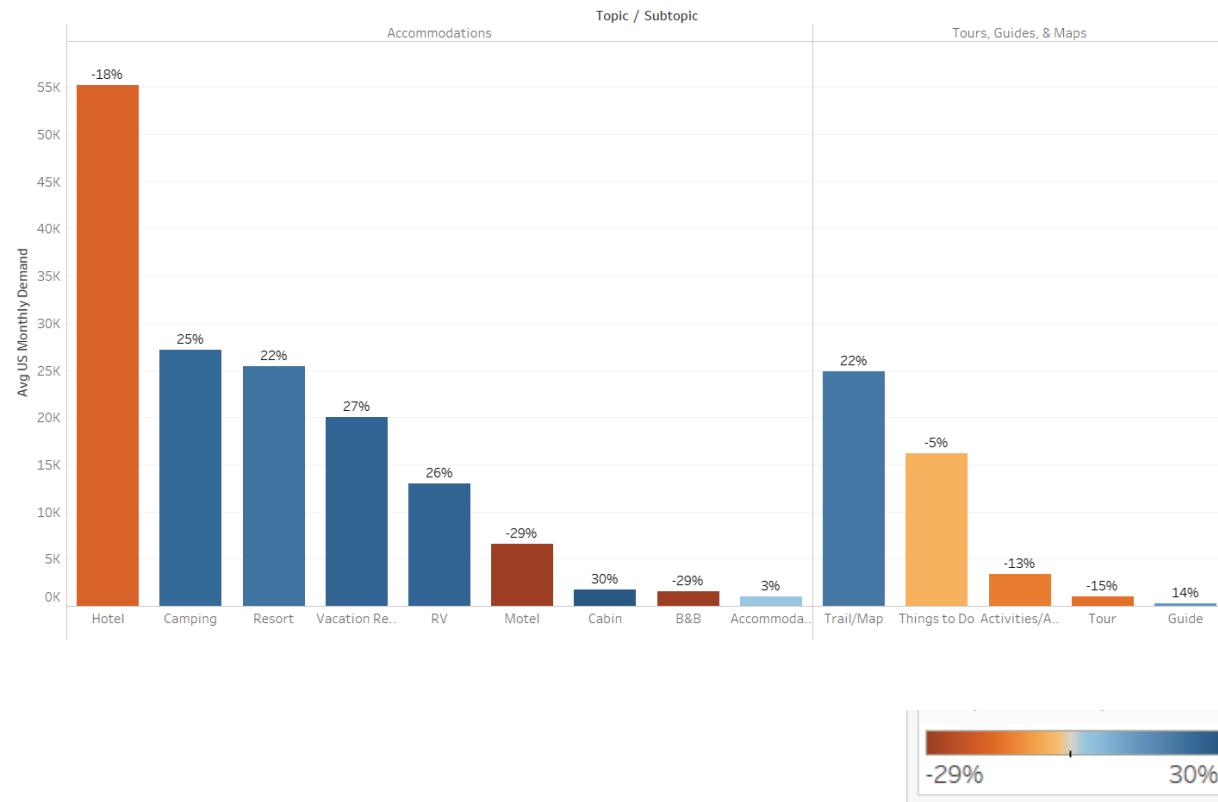


# Search Keyword Data Modeling

We modeled the data using Tableau to visualize and understand searcher interest, YoY search trends, and search seasonality.

Percentages shown throughout the presentation represent YoY growth (the last 12 months compared to the previous 12 months).

Average US monthly searches represent search interest.



Searcher Intent Modeling

# Executive Summary



# Executive Summary

The pandemic has had a profound impact on every aspect of our lives, and the travel landscape is no different. The data underlines that refuge destinations are drawing heightened search activity with a focus on locations, accommodations and activities that offer a greater sense of wellness. Through our research, we can see that for Central Oregon:

- Travel-intent search is at an all time high
- Seasonality of search has changed
- Travel-intent for vacations, and packages first peaks in January
- City-level search leads travel-intent
- Food & Drink dominates activity-intent search
- Activity matrix has expanded
- Accommodation-intent is changing
- Guide-intent search is up

# Travel-Intent Search is at an Historic High

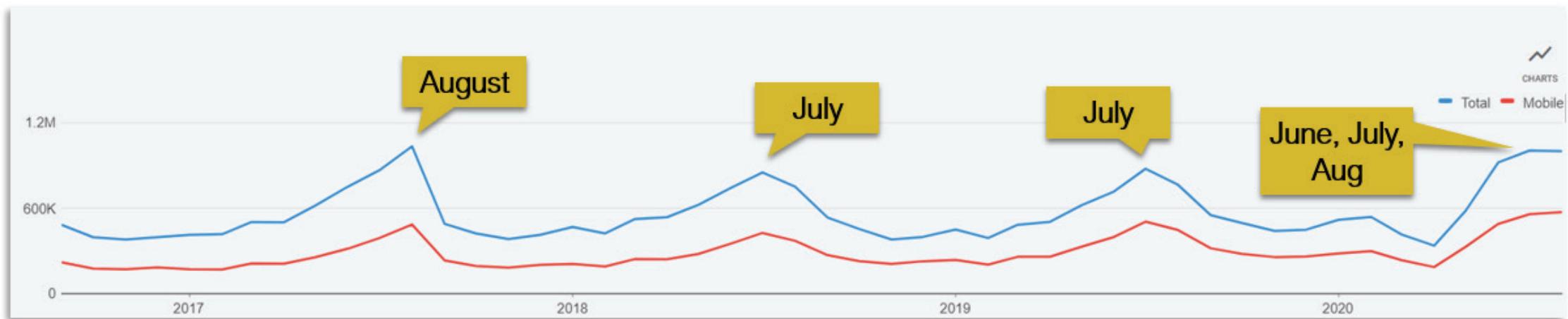
**Observation:** Average monthly travel-intent search in 2020 for Central Oregon of 716,000 is 9% higher than last year and exceeds each of the prior four years.

**Insight:** Travel-intent search is at an all time high. More people are looking for what Central Oregon and its constituent cities have to offer.

**Recommendation:** During the “passive-marketing” phase when direct outreach is not permitted, we recommend building a digital ecosystem that recognizes and optimizes for travel-intent search behavior.

This recommendation specifically applies to creating travel-intent focused:

- visitcentraloregon.com website architecture, website and blog content, social media content, influencer-partnered and published content
- VCO evolved brand positioning to align with searcher intent. The tourism market has changed, there is a significant opportunity to evolve the positioning Visit Central Oregon holds in the market to align with market preference.
- Implement region, city, accommodation, and activity packages to align with searcher intent.
- Ongoing SEO/content creation & optimization



# The Seasonal Model Has Changed

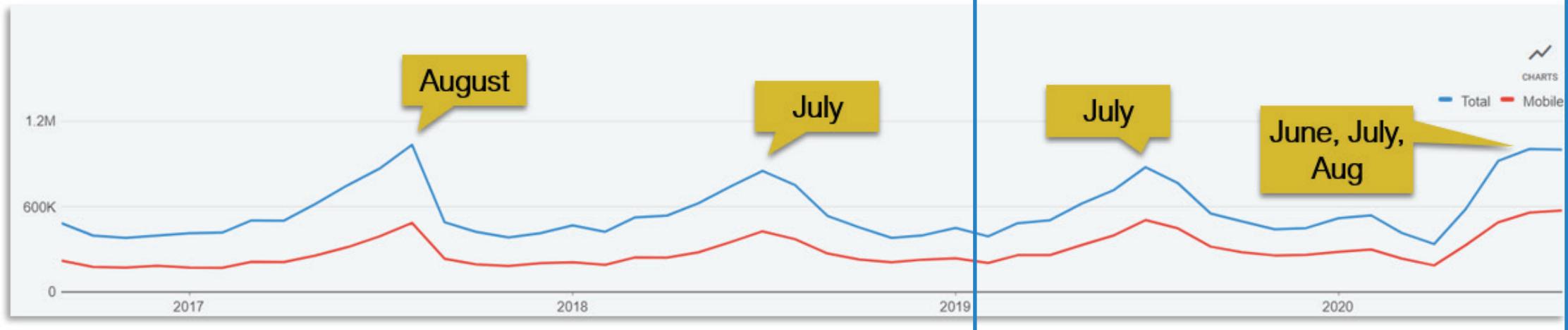
**Observation:** Travel-intent search typically peaks in the summer months. 2020 saw elevated levels of search, with a peak building in the spring and summer months. Unlike prior years, travel-intent search behavior did not ease off at the end of summer.

**Insight:** Societal, work and school dislocation has changed the traditional travel-intent search behavior. Central Oregon, like many second-tier population centers is experiencing out of cycle occupancy and in-migration.

**Recommendation:** While we expect there to be a return to normal distribution, we believe that there will be elevated levels of travel-intent based search while we are “out of normal”.

This presents a significant opportunity to present travel-intent based campaigns, packages and content to amplify location/accommodation/activities that are experiencing elevated levels of travel-intent based search.

The data identifies market segments that we are all familiar with such as food, drink, golf, biking and hiking. As we move into winter there are very real opportunities to double down with messaging and content focused on winter activities such as ice skating, snow shoeing, snowmobiling, cross country skiing, as well as partnership opportunities with HooDoo and Mt Bachelor.



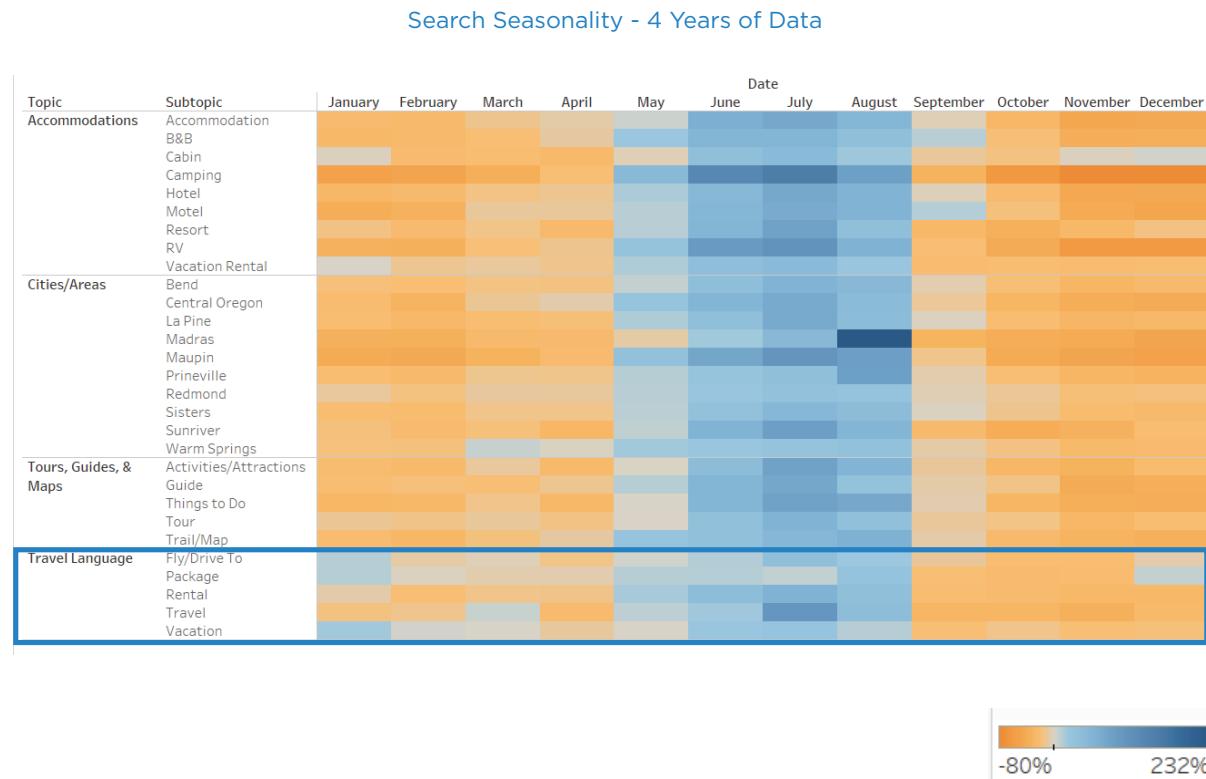
# Seasonal Model Underscores the Importance of Q1

**Observation:** While we expect travel-intent search to remain strong while we are all living our newly displaced lives. That said, a seasonal analysis of search-intent reveals that January shows strong growth in travel-intent search for vacations, vacation rental, vacation packages, and drive-to vacation options.

**Insight:** Top of funnel research is being conducted in the new year. With the exception of packages, this trend trails off towards the end of Q1 returning in the spring and staying strong through the end of summer.

**Recommendation:** We recommend that our clients push owned and influencer content 60 to 90 days before there is a measured increase in search activity. We recommend that you align paid marketing with seasonal search behavior.

As noted previously we recommend developing content and campaign messaging that aligns with the destinations, accommodation types and activities that your market is actively searching for, which special attention paid on emerging search trends.





# City-Level Search Leads Travel-Intent

**Observation:** As expected, city names dominate travel-intent search. Trend analysis shows that YoY travel-intent search behavior for Bend, La Pine, Prineville, Redmond, Sisters, Warm Springs is flat.

YoY travel-intent search is showing significant growth for Sunriver (28%), and Maupin (25%).

**Insight:** Urban-based tourism is down while the digital-nomad economy has increased travel-intent based search for non-urban markets. Markets like Central Oregon with low population density, infection rates and a plethora of dispersed, outdoor activities are trending.

**Recommendation:** We recommend creating an evergreen positioning, messaging, content, and at the right time, event strategy around each of the city brands in Central Oregon.

At the regional level we recommend:

- building out city-based content on [visitcentraloregon.com](http://visitcentraloregon.com)
- creating optimizing pages for search with a focus on travel-intent and trending activity data
- developing a social media content calendar that dovetails content with travel- and activity-intent search behavior.

At the city/resort/hotel/operator level, we recommend:

- dovetailing content from Visit Central Oregon with a unique local/operator inflection. For example, "A Walking Guide to Redmond", or "La Pine Lakes & Waterfalls".
- building campaigns and packages that leverage city-brand and activity data



# Food & Drink Dominates Activity-Intent Search

**Observation:** Food and drink dominates activity-intent search with eight times more search than golf; the next most popular activity.

**Insight:** Dining, beer, wine, spirits, coffee and marijuana based search is by far and away the single most searched activity. It is worth noting that our data excludes branded search. As such we are not tracking search for 10 Barrel or 900 Wall. Instead, we are tracking keywords such as best place to eat in Redmond, or wine tasting in Sunriver.

**Recommendation:** We recommend creating an evergreen positioning, messaging, content, and at the right time, event strategy around food and drink.

We recommend authoring campaigns and content that positions Central Oregon as a destination for dining, beer, wine, spirits and marijuana. Campaigns should elevate brands (restaurants, bars, farms, etc), individuals (chefs, baristas, vintners, mixologists), explore tasting tours, create dining guides, create and promote experiences all of which lend to the belief that Central Oregon offers its visitors an unparalleled bounty.



# Own the Activities That Drive Travel-Intent

**Observation:** For decades Central Oregon has presented itself as a family playground. Now, more than ever, we have the opportunity to wrap everything that Central Oregon has to offer up with accommodation, dining, and outfitting opportunities.

**Insight:** low-density, dispersed activities have experienced significantly elevated levels of YoY activity-intent search:

- golf +32%
- hiking +21%
- lakes and waterfalls +21%
- floating +34%
- fishing +16%
- rafting +12%
- biking +37%
- mountain biking +20%
- skiing +23%
- horseback riding +27%

As we change season, we expect to see elevated travel-intent search around:

- skiing/snowboarding
- snowmobiling
- snowshoeing
- ice skating
- cross-country skiing
- sledding
- dog sledding

**Recommendation:** We recommend creating an evergreen positioning, messaging, and content around low-density, dispersed activities. Content that highlights safe-golf protocols, hiking guides, city walking tours, Redmond by Bike, etc.

Through the winter, we recommend building campaigns (where permissible) highlighting every person and resort-level winter activities.



# Accommodation-Intent Search is Changing

**Observation:** Traditional accommodation types are showing significant decline. It is important to note that trends in search intent vary by market, but search for hotel accommodations have declined by 18% YoY. YoY search has grown for:

- vacation rental +27%
- RV +26%
- resort +22%
- camping +25%

**Insight:** It is important to note that while hotel is declining YoY it still leads accommodation-intent search in markets like Bend, Redmond, Madras, Prineville, Warm Springs and La Pine.

**Recommendation:** Where appropriate, we recommend leveraging resort accommodations and for non-resort properties, we recommend underscoring resort-style accommodation experiences. We recommend doing this by leaning on top search activity categories food/drink, golf, hiking, biking, skiing, ice skating, etc. In each instance, we recommend developing content that connects activities with accommodation type emphasizing ease of access.



# Trail & Map Search is Up

**Observation:** Best and Top 10 lists dominate local search where intent to convert is high. In a similar vein, travel-intent search for Trail Guides and Maps is up 22% YoY.

**Insight:** Broadly speaking visitors understand what Central Oregon has to offer, they are actively searching to understand how to access it. Anyone who drove past Sparks Lake on their way into the Cascades knows that many out of town visitors ventured into the mountains, but stopped at the first place they found.

**Recommendation:** Give the market what they're looking for:

- city guides
- walking guides & lists
- hiking guides & lists
- biking guides & lists
- mountain biking guides & lists

Combine travel-intent desire to know where to go with insightful, live like a local, guides inflected with the flavor of each market or presented from the perspective of a lodging provider, or resort.

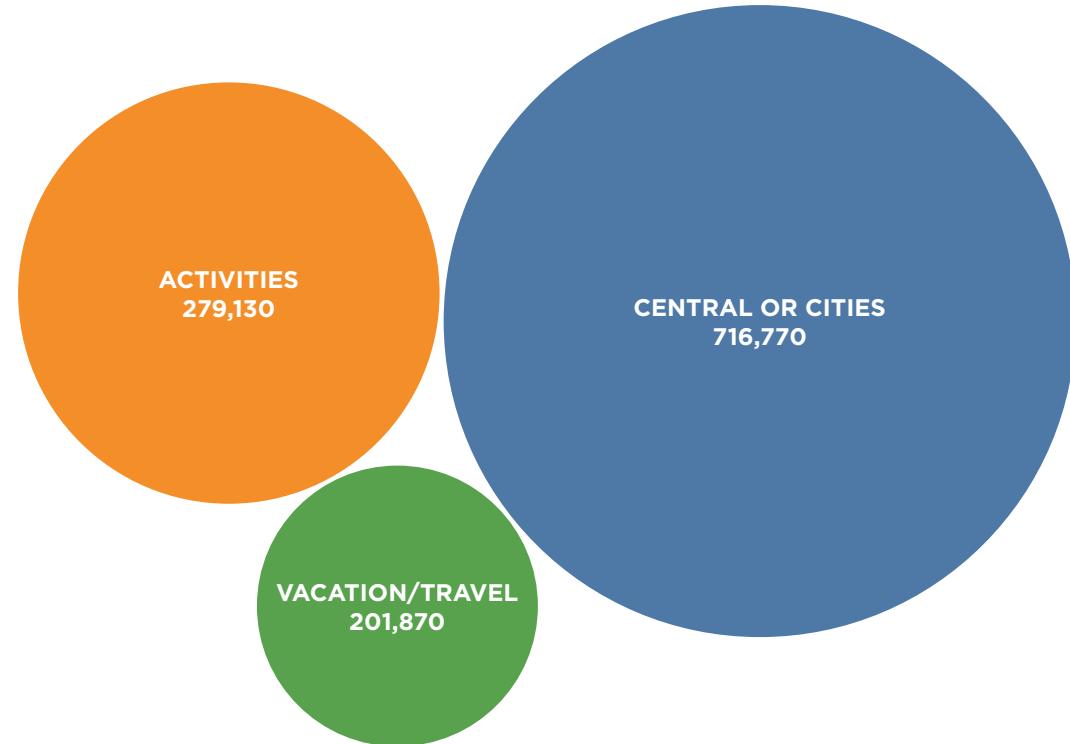
# Category Overview

In this searcher intent modeling report, there are three categories: Central OR Cities, Activities, and Vacation/Travel.

Multiple topics may live in each category, and multiple subtopics live in each topic, and keywords can be in multiple places. This allows us to pivot the data and look at it from multiple angles.

Example: *bend or skiing* can live in Central OR Cities and Activities.

All the keywords live in the Central OR Cities landscape as every keyword is associated with a central OR city or the area of Central Oregon.



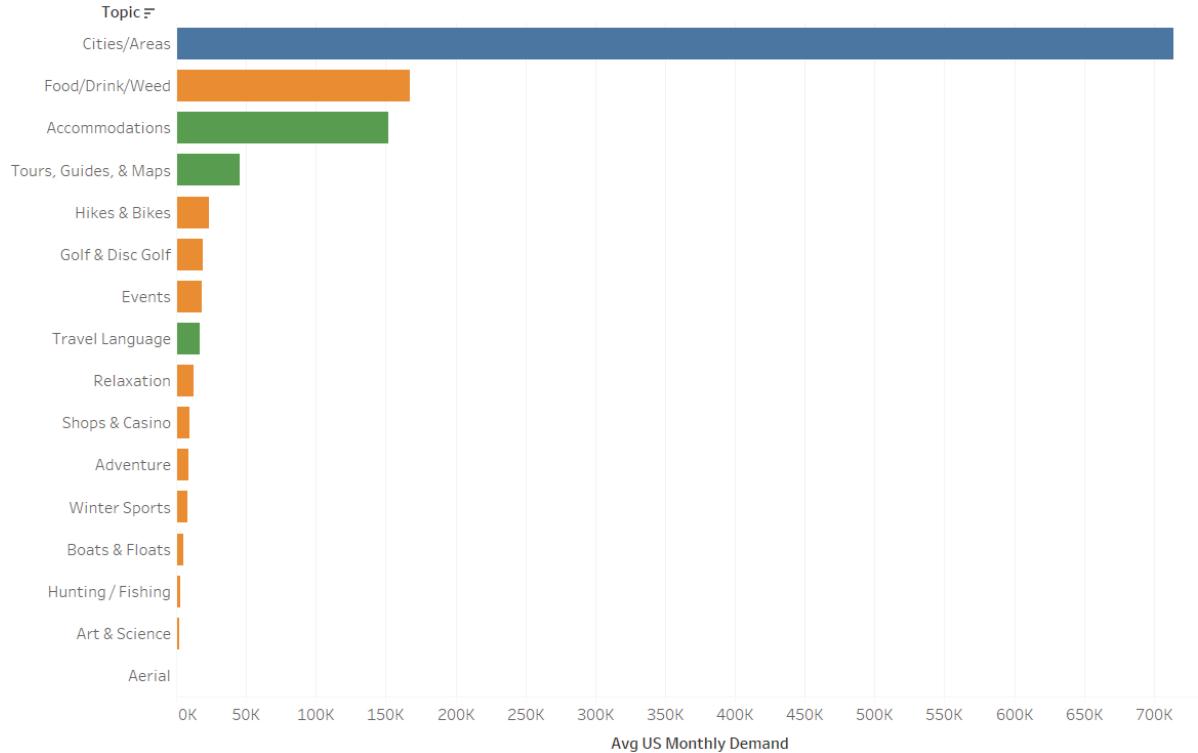


# Topic Overview

Cities/Areas dominate the landscape because this topic contains all of the keywords in the landscape, as every keyword in this keyword landscape is associated with a Central OR city or the area of Central OR.

General food/drink has 10% more search volume than accommodations (167K and 151K respectively).

Note we did not include specific restaurant names, hotel names, and specific attraction names (like Mt. Bachelor) in the landscape, this is a general non-brand landscape paired with Central OR cities.



Category
Activities
Central OR Cities
Vacation/Travel

# Subtopic Overview

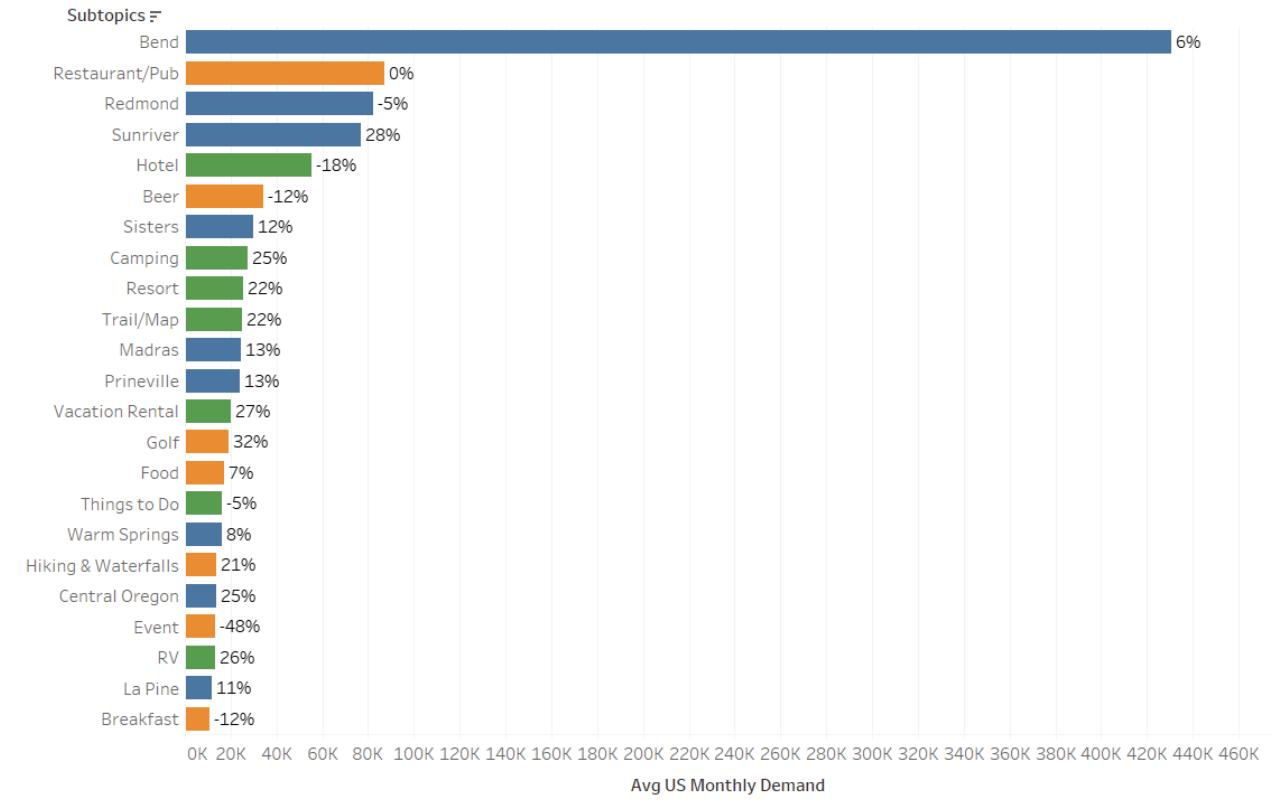
The following subtopics are in order in search interest (average monthly searches) and are colored by Category (City, Vacation/Travel, and Activities).

The percentages shown represent YoY search growth.

Subtopics shown have at least 10,000 monthly searches.

Top Growing Subtopics with significant search volume (in order of search interest) are:

- Sunriver +28%
- Camping +25%
- Resort +22%
- Trail/Map +22%
- Vacation Rental +27%
- Golf +32%
- Hiking & Waterfalls +21%
- Central Oregon +25%
- RV +26%
- Biking +37%



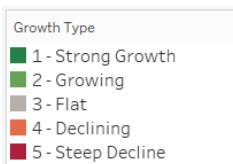
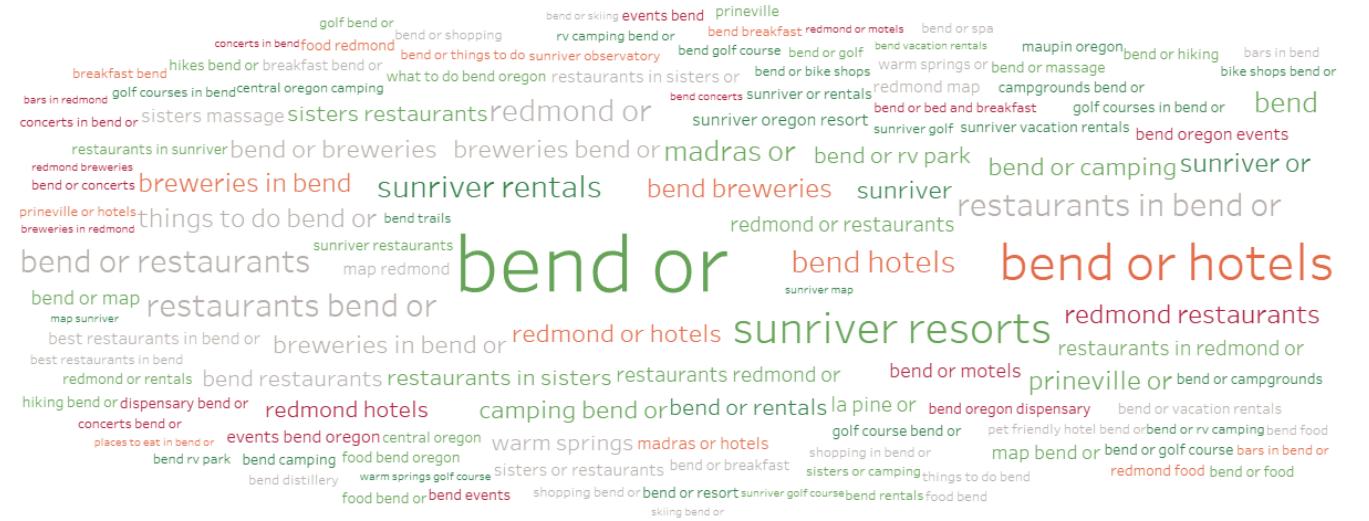
Category
Activities
Central OR Cities
Vacation/Travel



# Keyword Landscape

Keywords are sized by US monthly search volume and colored by growth. Keywords shown have at least 1,500 monthly searches.

We looked at over 20,000 keyword combinations equally across cities in Central Oregon and came back with 1,600 keywords with at least 10 monthly searches.

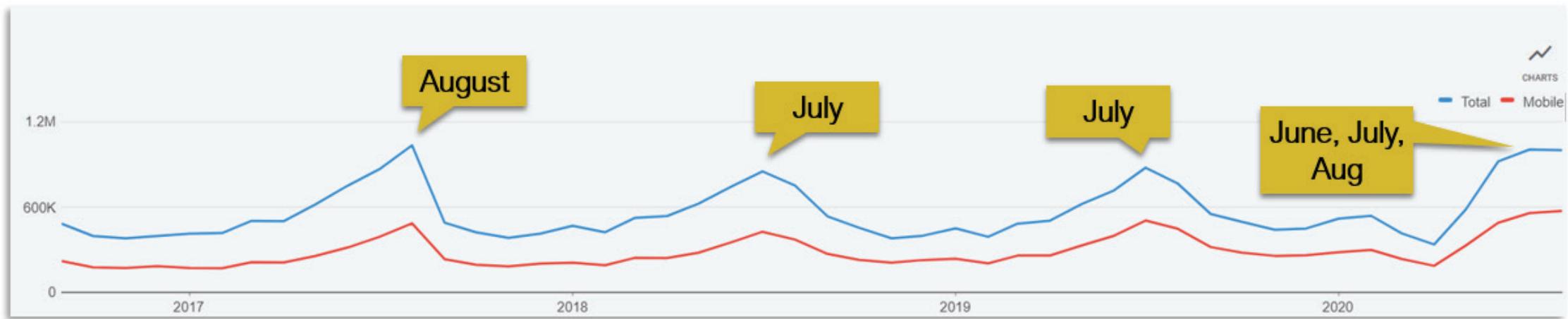


Searcher Intent Modeling

# Top Insights

# This Keyword Landscape Consistently Peaks in Summer Months

**Insight:** When looking at the aggregate 4-year data, we see that about 50% of searches are coming from a mobile phone. Historically searches had a strong peak in July or August, while this year, we are seeing higher search seasonality in June, July, and August showing a stronger interest in Central Oregon.



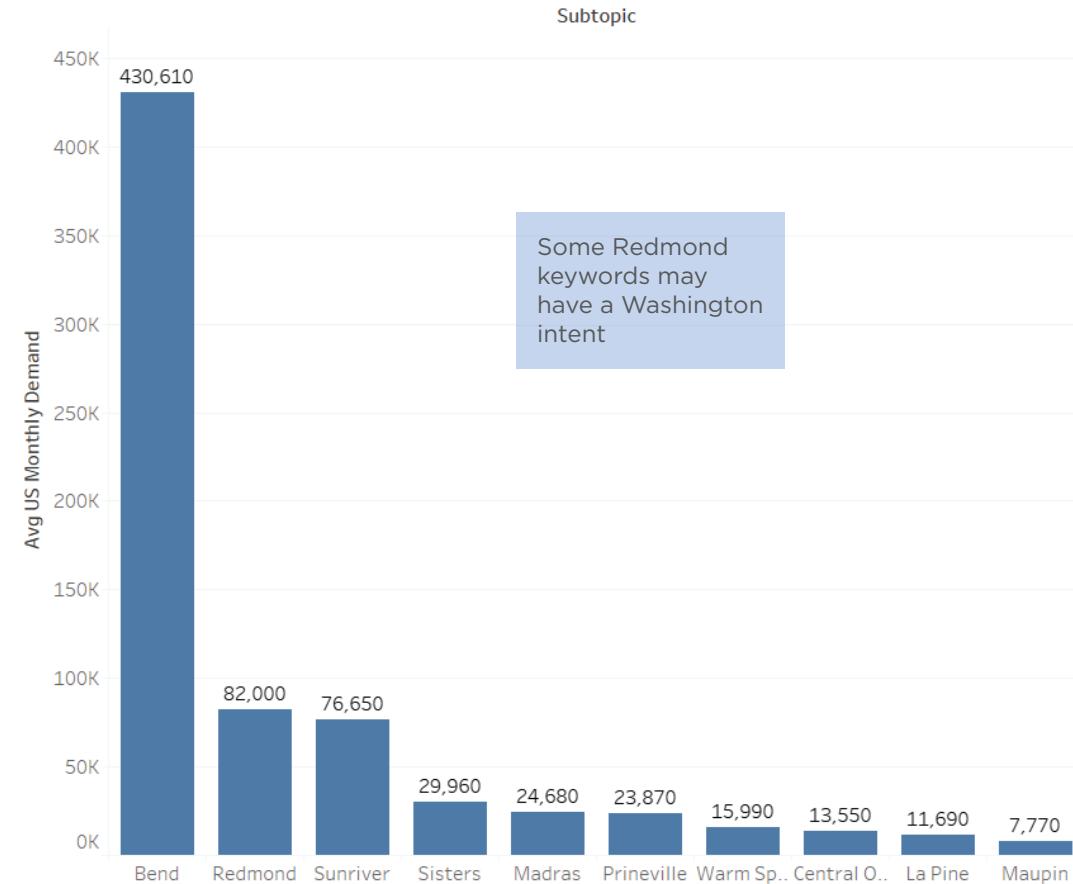


# Bend Dominates the Landscape

Bend searches account for more than 60% of this non-brand search landscape in Central Oregon.

Redmond may be slightly overinflated as some Redmond keywords have a mixed intent between Redmond, OR and Redmond, WA.

Bend has more than 5X search volume than Sunriver in this landscape.

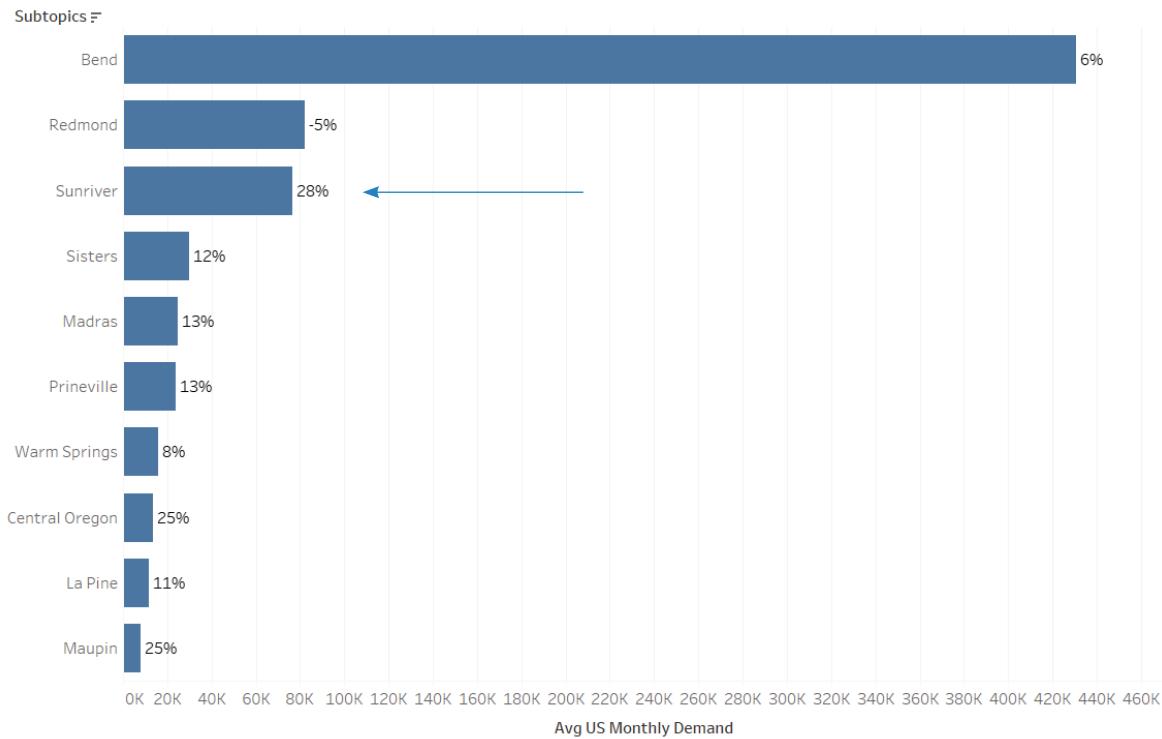


# Sunriver is the Highest Growing Area

Most areas are flat in this landscape except Sunriver has a 28% YoY growth in search interest.

Other growing areas include:

- Sisters +12% YoY
- Madras +13% YoY
- Prineville +13% YoY
- Central Oregon +25% YoY
- Maupin +25% YoY



# Food/Drink is the Top Searched Topic Behind General City Searches

Food, Drink and Weed searches had over 166K monthly searches in this landscape.

Top cities for food/drink/weed searches are:

- Bend: 198K monthly searches
- Redmond: 64K monthly searches
- Sisters: 31K monthly searches
- Sunriver: 13K monthly searches



# Golf is the Top Activity When Food/Drink is Excluded and is Growing 32%

Non-brand golf terms have over 18K monthly searches.

Bend has almost 3.5X more golf search interest than Sunriver.

Golf is growing substantially YoY:

- Bend (11K monthly searches) +27% YoY
- Sunriver (3K monthly searches) +50% YoY
- Redmond (1.4K monthly searches) +17% YoY
- Warm Springs (1.2K monthly searches) +39% YoY
- Central Oregon (1K monthly searches) +54% YoY
- Golf searches in La Pine & Prineville are flat.



# Golf, Biking, Wine and Skiing are the Top Activities with Higher Search Interest Growing YoY

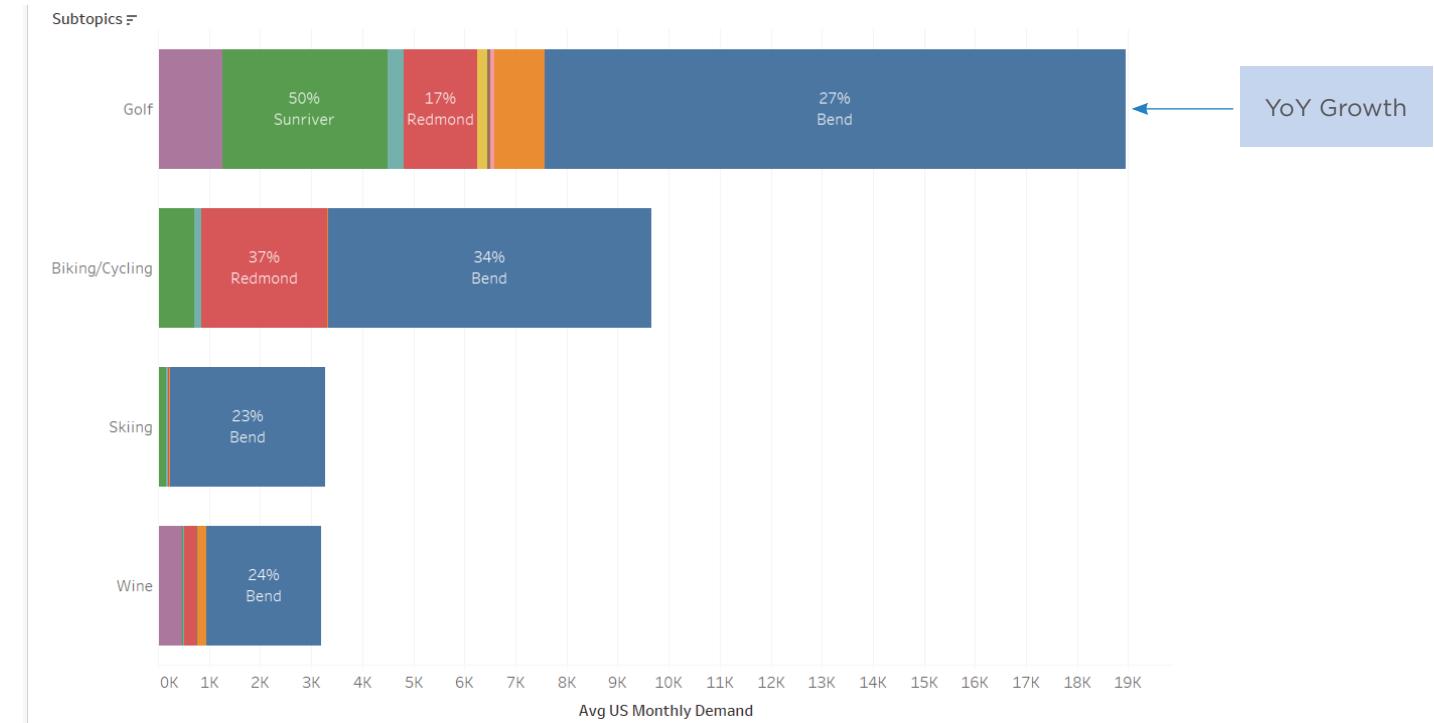
The percentages in the bar chart represents YoY growth (average of the last 12 months compared to average of the previous 12 months).

Bend dominates the landscape for these activities.

Golf and Biking have strong seasonality May-August.

Wine has seen a stronger interest in the pandemic and has stronger seasonality April-August.

Skiing peaks December and January. Note that the skiing searches in this landscape are paired with city names, not specific mountains (Mt. Bachelor).



Cities
Bend
Central Oregon
La Pine
Madras
Prineville
Redmond
Sisters
Sunriver
Warm Springs

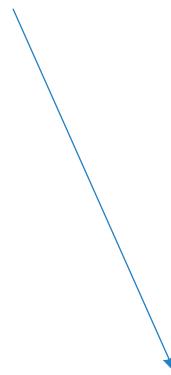
# Hotel is the Preferred Accommodation Overall, but is Declining YoY

Preferred accommodation types vary by city, but when looking at the entire Central Oregon landscape, hotel is the preferred accommodation (mostly dominated by Bend).

Overall, hotel is declining 18% YoY.

Bend is the top city associated with hotel, followed by Redmond, which is seeing a 24% decline in hotel searches.

The next top searched accommodation type is camping, which is up 25% YoY.



# Camping, Resort, Vacation Rentals, & RV are Trending Up Significantly YoY



## Camping

- 27K Monthly Searches
- +25% YoY
- Top Cities Associated:  
Bend (18K) & Sisters (2.2K)



## Resort

- 25K Monthly Searches
- +22% YoY
- Top Cities Associated:  
Sunriver 20K &  
Bend 3.5K searches



## Vacation Rental

- 20K Monthly Searches
- +27% YoY
- Top Cities Associated:  
Sunriver (9K) & Bend (6K)



## RV

- 13K Monthly Searches
- +26% YoY
- Top Cities Associated:  
Bend (8.8K) &  
Sunriver (1.3K)



# Preferred Accommodation Type Changes by City

## Bend

**Preferred Accommodation:** Hotel (36K)

**Top Growing Accommodations:** Resort +38% & Cabin +39% YoY

## Sisters

**Preferred Accommodation:** Camping (2.2K)

**Top Growing Accommodations:** Camping +18%, Vacation Rental +25%, RV +19%

## Warm Springs

**Preferred Accommodation:** Hotel (500)

**Top Growing Accommodations:** Camping +13% & Vacation Rental +25%

## Redmond

**Preferred Accommodation:** Hotel (9.8K)

**Top Growing Accommodations:** Vacation Rental +7% & Resort +21%

## Madras

**Preferred Accommodation:** Hotel (3K)

**Top Growing Accommodations:** Camping +20% & RV +21%

## La Pine

**Preferred Accommodation:** Hotel (1K)

**Top Growing Accommodations:** Vacation Rental +17%, Camping +79%, & RV +17%

## Sunriver

**Preferred Accommodation:** Resort (21K)

**Top Growing Accommodations:** Resort +20%, Vacation Rental +39% Camping +60% RV +33%

## Prineville

**Preferred Accommodation:** Hotel (1.7K)

**Top Growing Accommodations:** Camping +37% & Vacation Rental +9%

## Maupin

**Preferred Accommodation:** Camping (670)

**Top Growing Accommodations:** Camping +77%, RV +46%, and Vacation Rental +30%

## Central Oregon

**Preferred Accommodation:** Camping (2K)

**Top Growing Accommodations:** Camping +68%, Resort +32% RV +31% Hotel +28% and Vacation Rental +23%



# Top 5 Cities Activity & Vacation Travel Search Interest & Growth

## Bend

### Top Activities Search Interest

Restaurant (41K)  
Beer/Brewery (30K)  
Golf (11K)

### Top Activities YoY Growth\*

ATV/Off Road +54%  
Biking +49%  
Casino +45%

### Vacation/Travel Interest

Hotel (36K)  
Camping (18K)  
Things to Do (12K)



## Redmond

### Top Activities Search Interest

Restaurant (19K)  
Food (5K)  
Beer (3K)  
Biking (2K)

### Top Activities YoY Growth\*

Biking +47%  
Hiking/Waterfalls +28%  
Skatepark +40%

### Top Vacation/Travel Interest

Hotel (10K)  
Trail/Map (6K)  
Vacation Rental (1.5K)



## Sunriver

### Top Activities Search Interest

Restaurant (6K)  
Golf (3K)  
Observatory (770)

### Top Activities YoY Growth\*

Biking +67%  
Floating +65%  
Horseback Riding +65%  
Golf +50%

### Vacation/Travel Interest

Resort (20K)  
Vacation Rental (9K)  
Trail/Map (3K)



## Sisters

### Top Activities Search Interest

Restaurant (14K)  
Facial/Massage (3.6K)  
Hiking/Waterfalls (1K)

### Top Activities YoY Growth\*

Hiking/Waterfalls +31%  
Golf +24%

### Vacation/Travel Interest

Camping (2.2K)  
Vacation Rental (1K)  
RV (1K)



## Madras

### Top Activities Search Interest

Restaurant (2K)  
Food (500)  
Dispensary (200)

### Top Activities YoY Growth\*

Food+70%  
Dispensary +48%

### Vacation/Travel Interest

Hotel (3K)  
Trail/Map (1K)  
Camping (1K)



\*With more than 250 monthly searches



# Next 5 Cities Activity & Vacation Travel Search Interest & Growth

## Prineville

### Top Activities Search Interest

Restaurant (2K)  
Golf (200)  
Event (100)

### Top Activities YoY Growth\*

Skatepark +516%  
Food +71%  
Shopping +23%

### Vacation/Travel Interest

Hotel (1.7K)  
Vacation Rental (1K)  
Camping (800)



## Warm Springs

### Top Activities Search Interest

Golf (1.2K)  
Restaurant (500)  
Casino (500)  
Spa (500)

### Top Activities YoY Growth\*

Casino +42%  
Golf +39%  
Wine +28%

### Top Vacation/Travel Interest

Hotel (500)  
Camping (200)  
Resort (170)



## Central Oregon

### Top Activities Search Interest

Hiking/Waterfalls (1.2K)  
Golf (1K)  
Hot Spring (200)  
Rockhounding (200)

### Top Activities YoY Growth\*

Disc Golf +80%  
Golf +54%  
Rockhounding +54%

### Vacation/Travel Interest

Camping (2K)  
Trail/Map (1.7K)  
Vacation Rental (500)



## La Pine

### Top Activities Search Interest

Restaurant (1.1K)  
Dispensary (100)  
Golf (80)

### Top Activities YoY Growth\*

Hiking/Waterfalls +38%  
Dispensary +24%

### Vacation/Travel Interest

Hotel (1K)  
Motel (450)  
Trail/Map (300)



## Maupin

### Top Activities Search Interest

Rafting (1K)  
Restaurant (300)  
Fly Fishing (50)

### Top Activities YoY Growth\*

Fly Fishing +49%  
Restaurant +29%  
Rafting +20%

### Vacation/Travel Interest

Camping (700)  
Hotel (500)  
Tour (200)  
Trail/Map (160)



Searcher Intent Modeling

# Appendix

Searcher Intent Modeling

# Central Oregon Cities & Travel



# Categories Overview

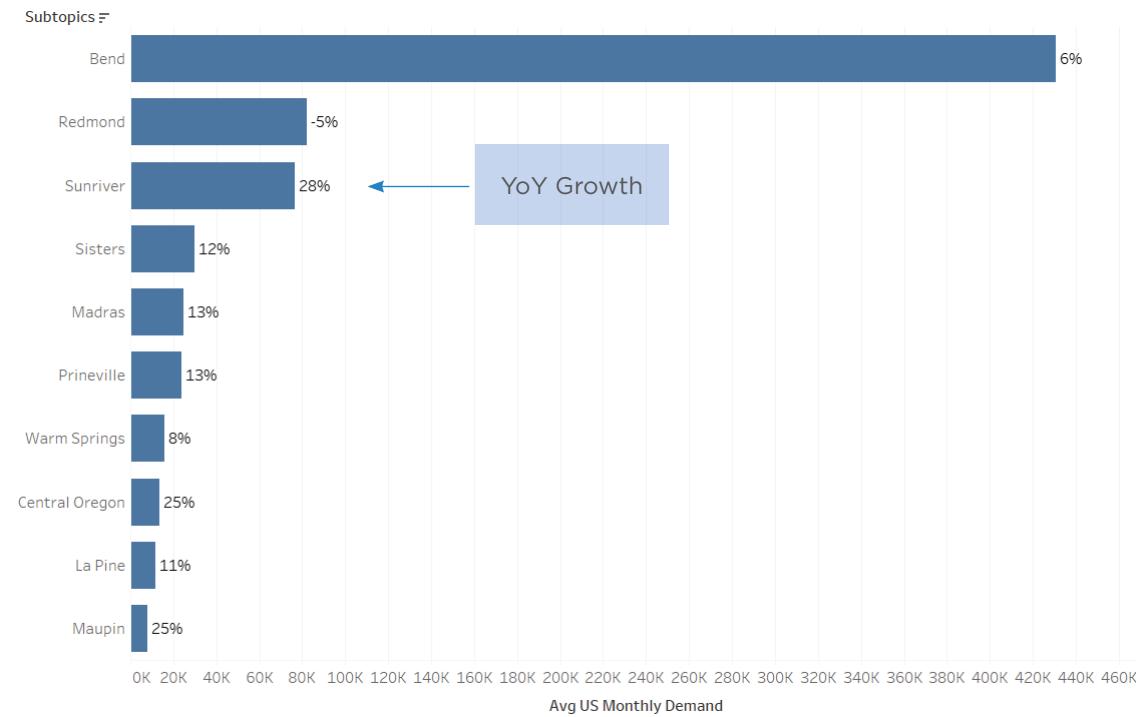
Central Oregon Cities		CO Vacation Travel		
Cities/Areas	Accommodations	Tours, Guides, & Maps	Travel Language	
Bend	Hotel	Trail/Map	Rental	
Redmond	Camping	Things to Do	Vacation	
Sunriver	Resort	Activities/Attractions	Package	
Sisters	Vacation Rental	Tour	Fly/Drive To	
Madras	RV	Guide	Travel	
Prineville	Motel			
Warm Springs	Cabin			
Central Oregon	B&B			
La Pine	Accommodation			
Maupin				

# City Interest Comparison

Bend queries has 5X more search volume (in this landscape) than the next highest city for US monthly search interest.

Sunriver, Central Oregon and Maupin have the highest YoY Growth.

Redmond may be overinflated has some Redmond keywords may have a Redmond, WA intent, which is hard to always know if the keyword is not qualified by 'OR'.

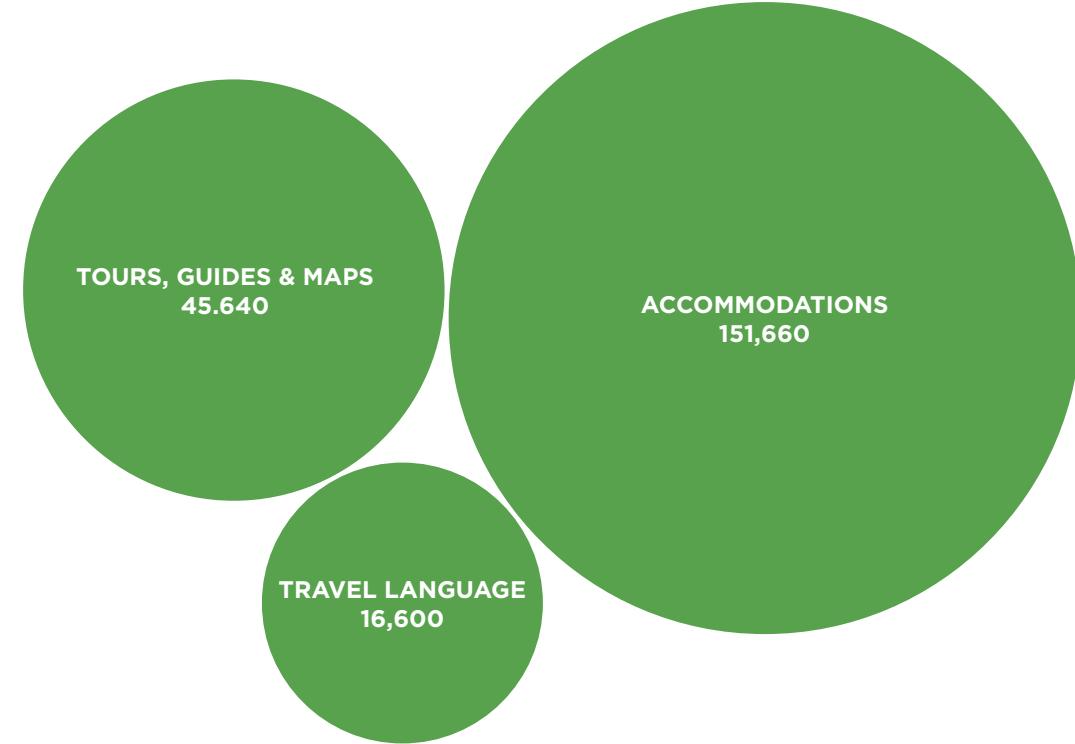




# Central Oregon Vacation Travel

This section is looking at Accommodations, Tours/Guides/Maps, and travel language such as Vacation Package, Travel To, Fly To, Activity Rentals, etc.

Accommodations was the top area of interest with over 150K.



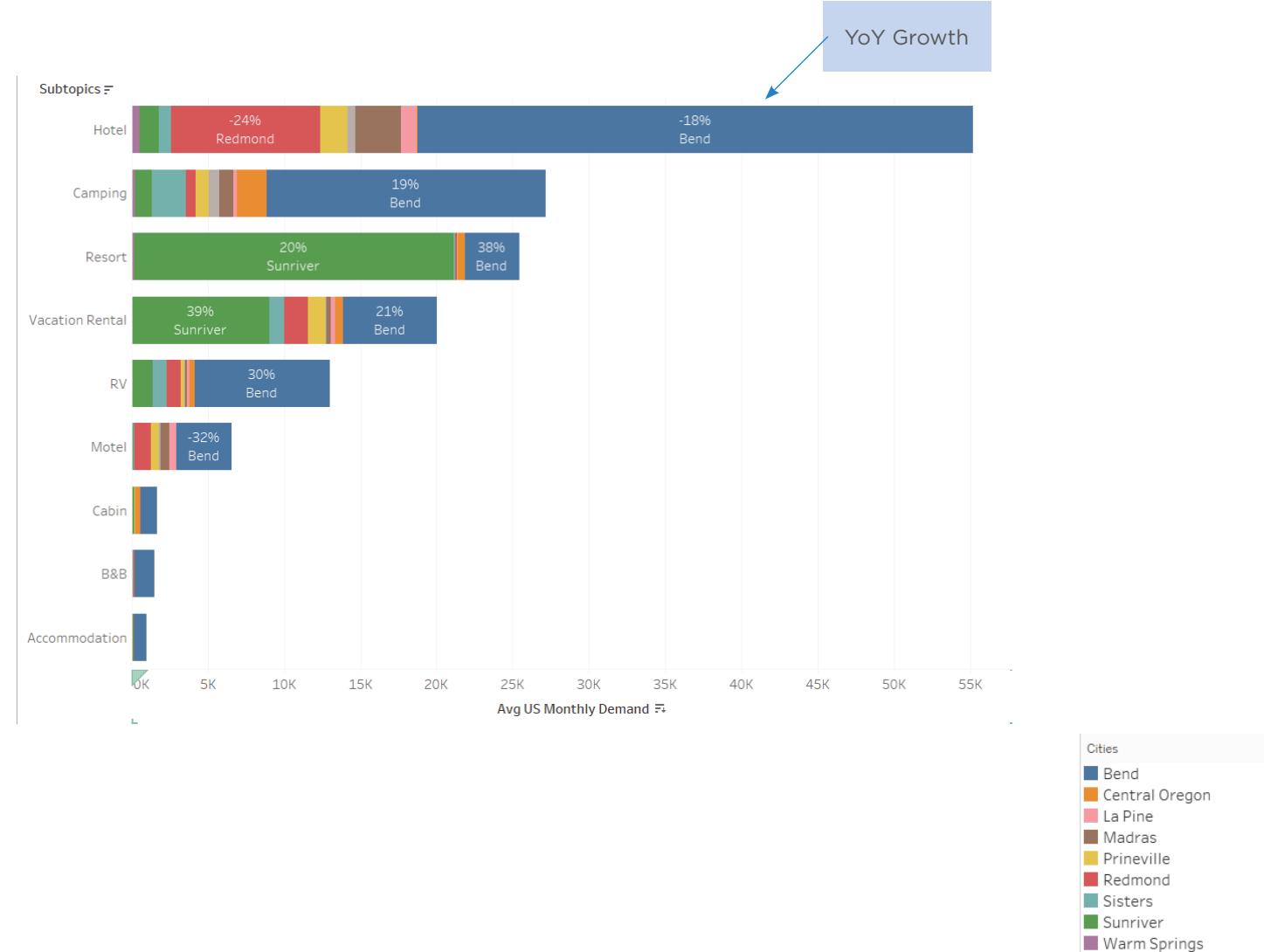


# Accommodations

Hotel is the top accommodation type for the entire Central Oregon landscape followed by camping, resort, then vacation rental.

Bend is the top location accommodations are being sought for.

The landscape changes for Sunriver, where resort and vacation rental are the top accommodation types.





# Hotels are Down YoY, but Camping Resorts, & Vacation Rentals are Up

While hotels have the highest search interest overall, they are trending down 18% YoY when looking at the entire landscape.

Camping, Resort, Vacation Rentals and RV are up significantly (25%, 22%, 27%, and 26% respectively).

Surprisingly, motels are down 29% YoY, when motels are made for pandemic travel (could be a consumer education opportunity).

Bed and Breakfasts have minimal search volume compared to other accommodation types and are down 29% YoY.



Keywords displayed have a minimum of 1,000 monthly searches



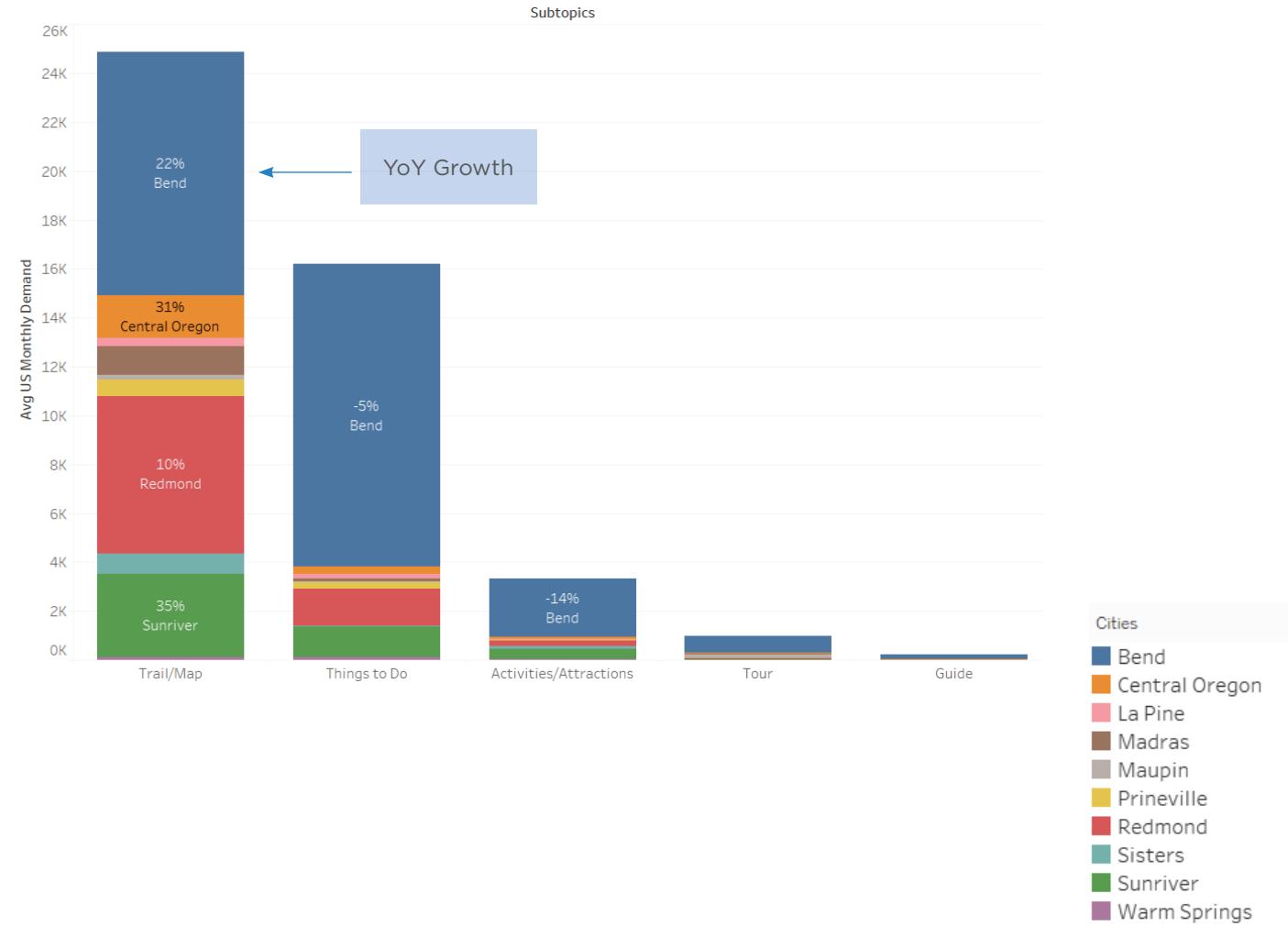
# Trails & Maps are Up 22% YoY

Trails and Maps have 1.5X more search volume than Things to do (24,880 vs 16,210 respectively) and trails/maps are up 22% YoY as searchers are looking to physically distance.

Bend, Redmond and Sunriver are the top areas for trails/maps.

Things to do is flat YoY.

Tours and Guides have minimal search volume and are mostly associated with Bend.





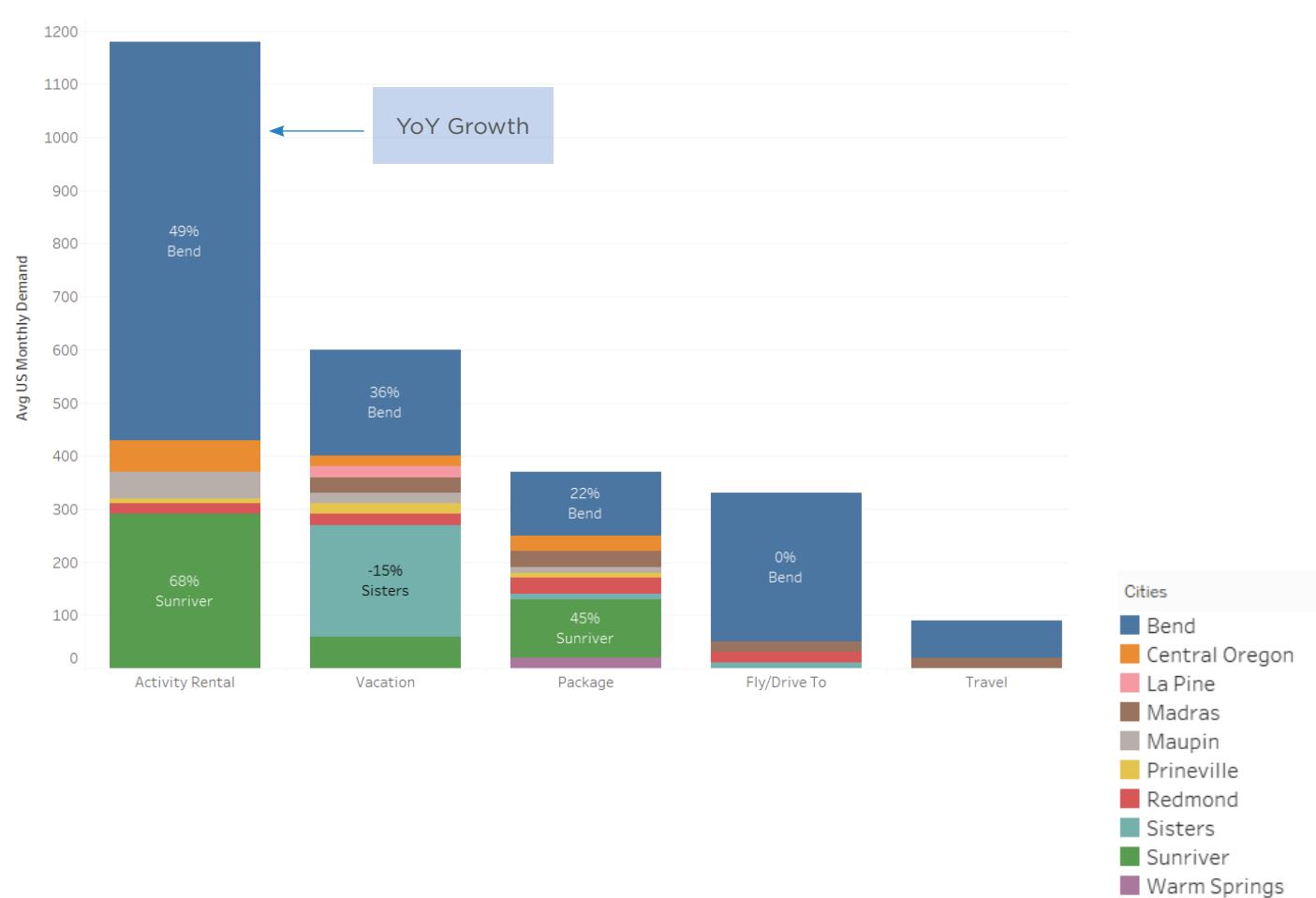
# Vacation Language Interest & Trends

Rental is the top area of interest, which is activity rentals, mostly around boats/floats in Bend and Sunriver.

Sisters has more 'vacation' language.

Sunriver and Bend have similar search interest for packages and package keywords are up 75% YoY.

While 'travel' keywords have lower search interest, it has increased 143% YoY, specifically travel to Bend.





# Packages are Trending Up

While the package landscape is low for search interest, this area is trending up.

Golf and Vacation are the top qualifiers for packages mostly concentrated around Bend and Sunriver.

We are seeing emerging keywords in this landscape for Madras, Warm Springs, Maupin and Redmond as people have started looking for vacation packages in the last 12 months that they didn't look for before.

bend vacation packages  
sisters vacation packages  
sunriver vacation packages  
redmond vacation packages  
bend oregon ski packages  
bend oregon vacation packages madras vacation packages  
bend packages central oregon vacation packages  
madras oregon vacation packages  
**sunriver golf package**  
sunriver ski packages  
bend or golf packages warm springs vacation packages  
bend ski packages  
sunriver oregon vacation packages  
central oregon golf package  
warm springs vacation package redmond packages redmond oregon vacation packages  
sunriver oregon golf packages prineville vacation packages sunriver vacation package  
bend oregon skiing package bend vacation package  
maupin vacation packages sunriver spa packages  
madras vacation package

- █ 1 - Strong Growth
- █ 2 - Growing
- █ Emerging Keyword
- █ Low Search Volume

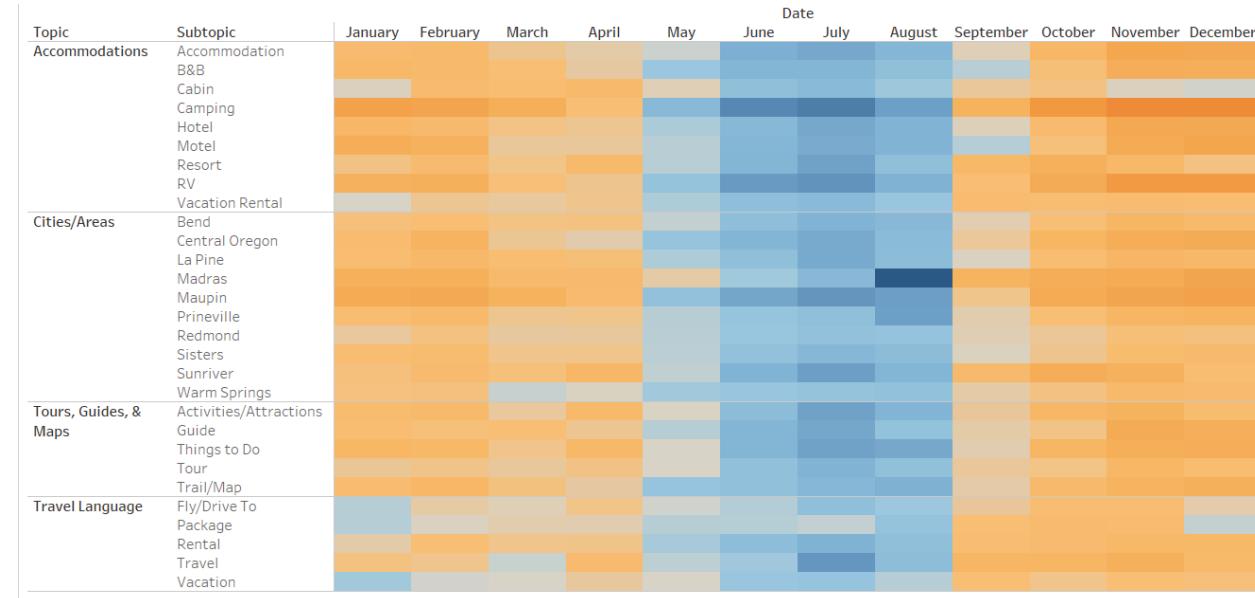


# Search Seasonality (4 Years Data)

The darker blue the box is, correlates with higher search seasonality.

When looking at 4 years of search data, searches typically peak in June-August for cities and travel language.

Vacation, Package and Fly/Drive To language has had a small surge in search interest in January, meaning, searchers may start planning their summer vacation 4-7 months prior to arrival.



Searcher Intent Modeling

# Activities Overview



# Activities Categorization

Central Oregon Activities												
Food/Drink/Weed	Hikes & Bikes	Golf & Disc Golf	Events	Relaxation	Shops & Casino	Adventure	Winter Sports	Boats & Floats	Hunting / Fishing	Art & Science	Aerial	
Restaurant/Pub	Hiking & Waterfalls	Golf	Event	Facial/Massage	Shopping	Rafting	Skiing	Floating	Fishing	Observatory	Hot Air Balloon	
Beer	Biking/Cycling	Disc Golf	Concert	Spa	Casino	Horseback Riding	Ice Skating	Kayak/Canoeing	Fly Fishing	Museum	Helicopter	
Food	Mountain Biking		Festival	Hot Spring		Caves	Snowshoeing	SUP	Hunting	Rockhounding		
Breakfast				Scenic Drive		Skatepark	Cross Country Skiing	Boating			Art Gallery	
Dispensary						ATV/Off Road	Sledding					
Wine						Rock Climbing	Dog Sledding					
Lunch						Ziplining	Snowboarding					
Dinner						Skydiving						
Distillery												
Drinks												

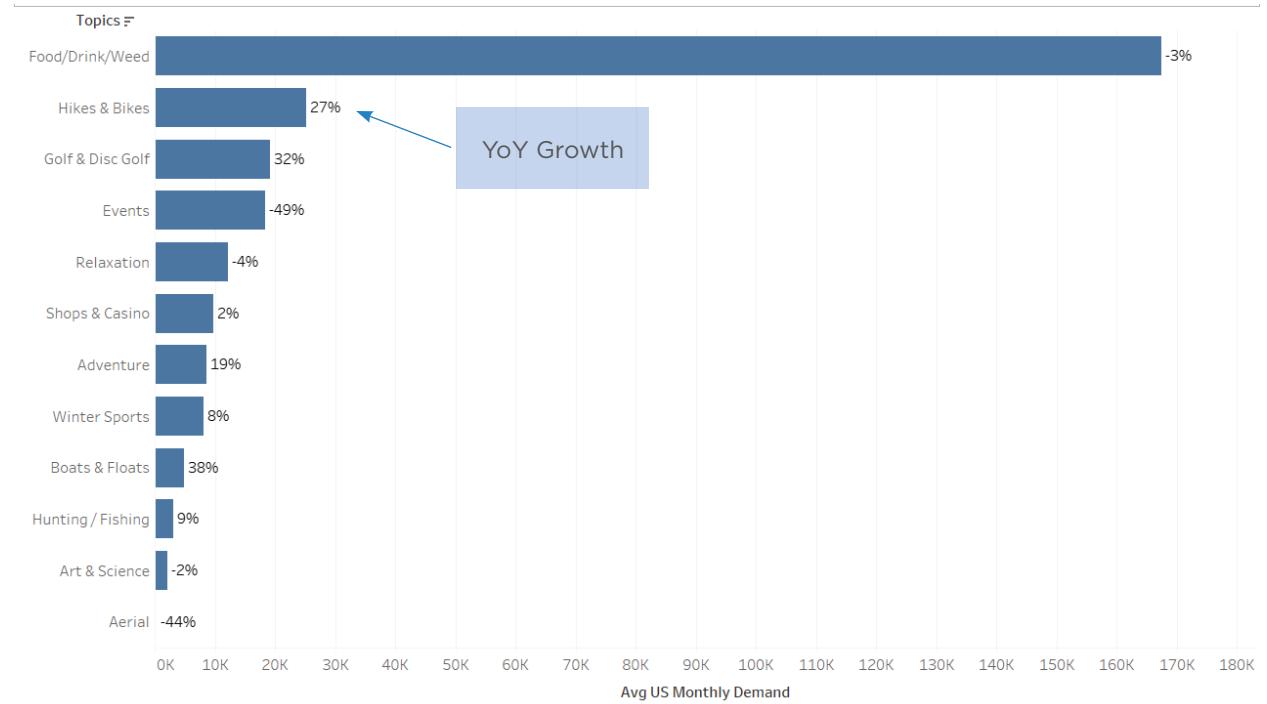
# Activities Overview

Food and Drink dominate the landscape and is relatively flat YoY.

Hikes/Bikes and Golf are the top activities behind food/drink, both of which are up significantly in YoY search growth.

Events are down 49% YoY (as expected).

Bend is the top city associated with these activities.

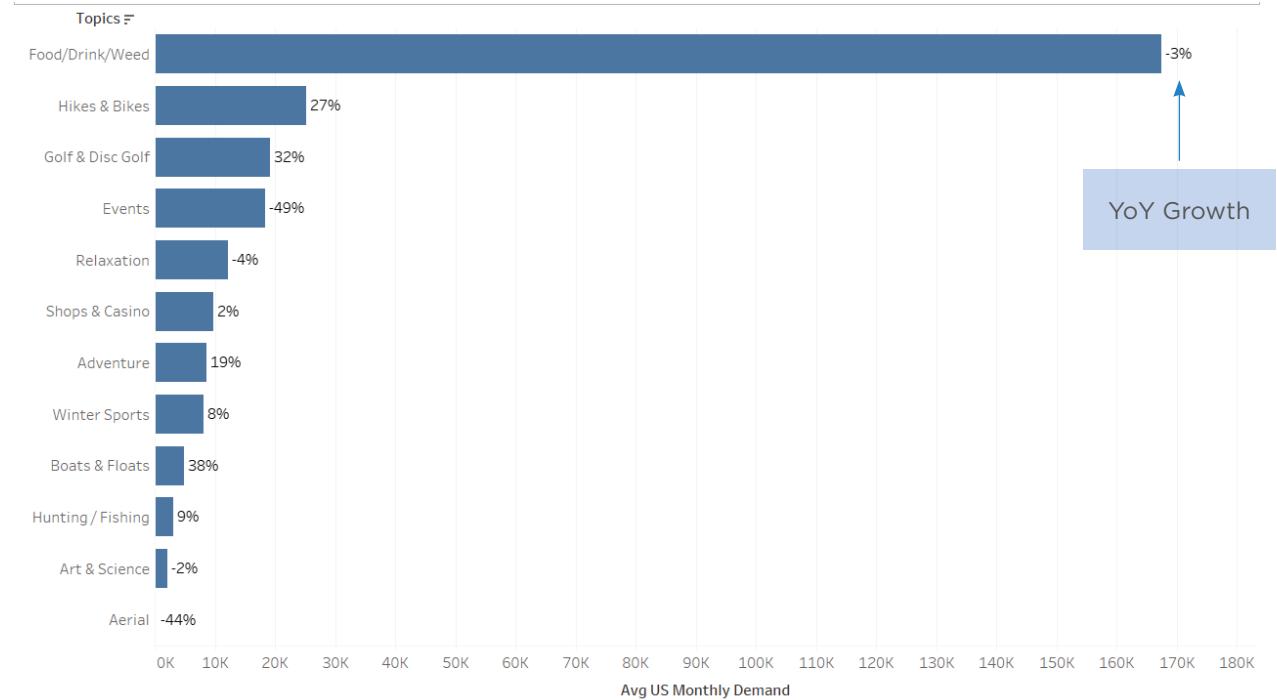


# Top Activities When Food/Drink is Excluded

Golf rises to the top when food/drink is excluded.

Top growing activities YoY are:

- Golf +32%
- Hiking/Waterfalls +21%
- Biking +37%
- Skiing +23%
- Floating +34%
- Mountain Biking +20%
- Horseback Riding +27%
- Kayak/Canoeing +32%
- Casino +40%





# Top Activity Keywords

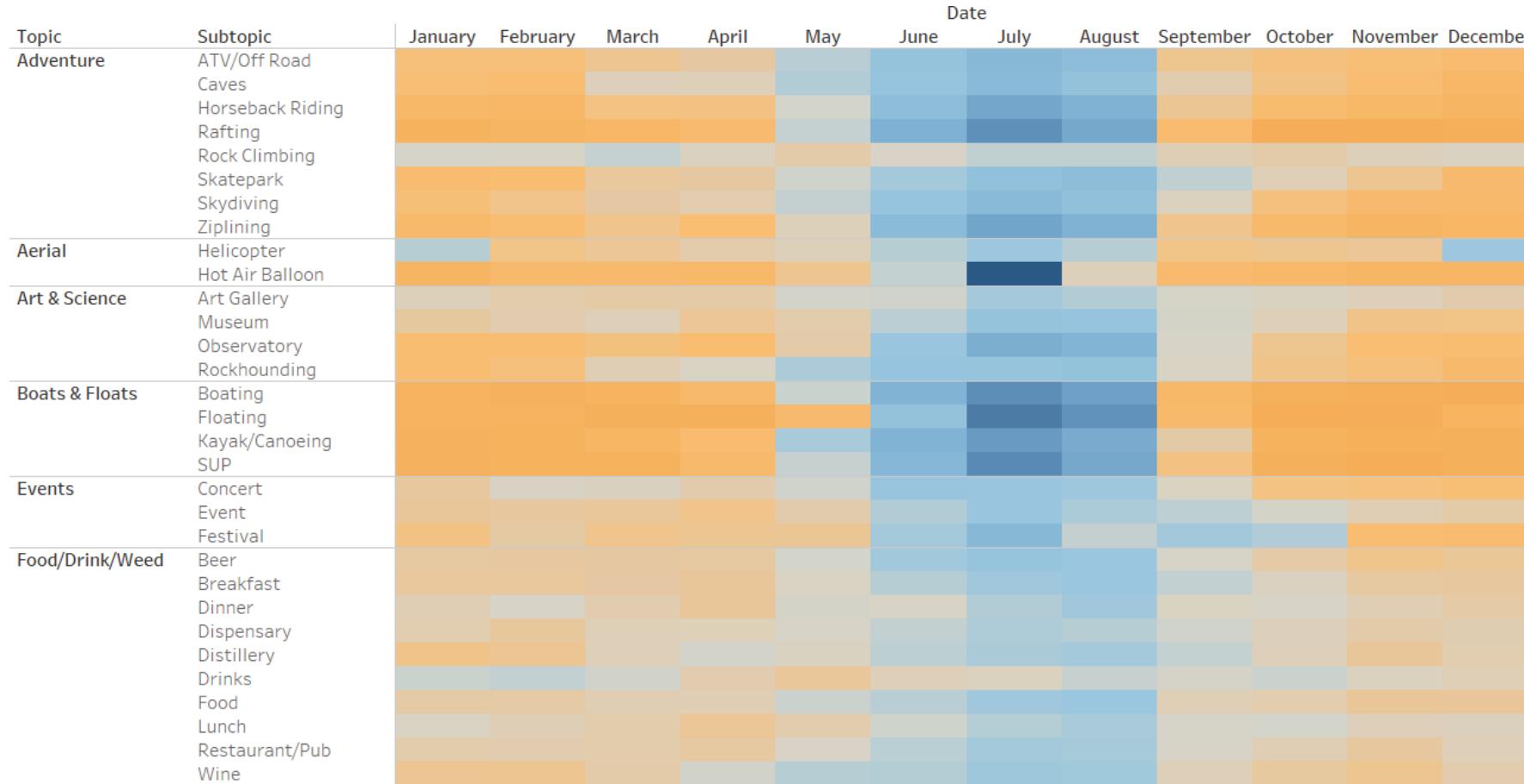
food bend**bend or massage**bend or shopping  
shopping in bend or **food redmond**sisters massage **hiking** bend or **bend or bike shops** bend golf course  
**restaurants in redmond** or **bend restaurants** food bend oregon bend or food **bend or concerts**  
**golf courses in bend** or **hikes bend** or **golf courses in bend**  
**redmond food** breweries bend or **restaurants redmond** or **restaurants in sunriver** bend or breweries  
**bend events** breweries in bend or **sisters restaurants** **events bend** **redmond restaurants**  
**breweries in bend** **restaurants in bend** or **bend** or **restaurants**  
bars in bend **sunriver restaurants**  
**bend or golf** **dispensary** bend or **bend breweries** **restaurants bend** or **sisters or restaurants**  
bend or breakfast **golf course** bend or  
**bend breakfast** **restaurants in sisters** food bend or best restaurants in bend or **events bend oregon** bend distillery  
**bars in bend** or **redmond** or **restaurants** restaurants in sisters or breakfast bend or best restaurants in bend  
bend or spa **bend oregon dispensary** **bend oregon events** **sunriver golf** **concerts in bend** or **bike shops** bend or  
**breakfast bend** **bend or golf course** bend or hiking bend food shopping bend or **concerts bend** or  
golf bend or

Keywords displayed have a minimum of 1,000 monthly searches,  
are sized by US search volume and colored by YoY growth

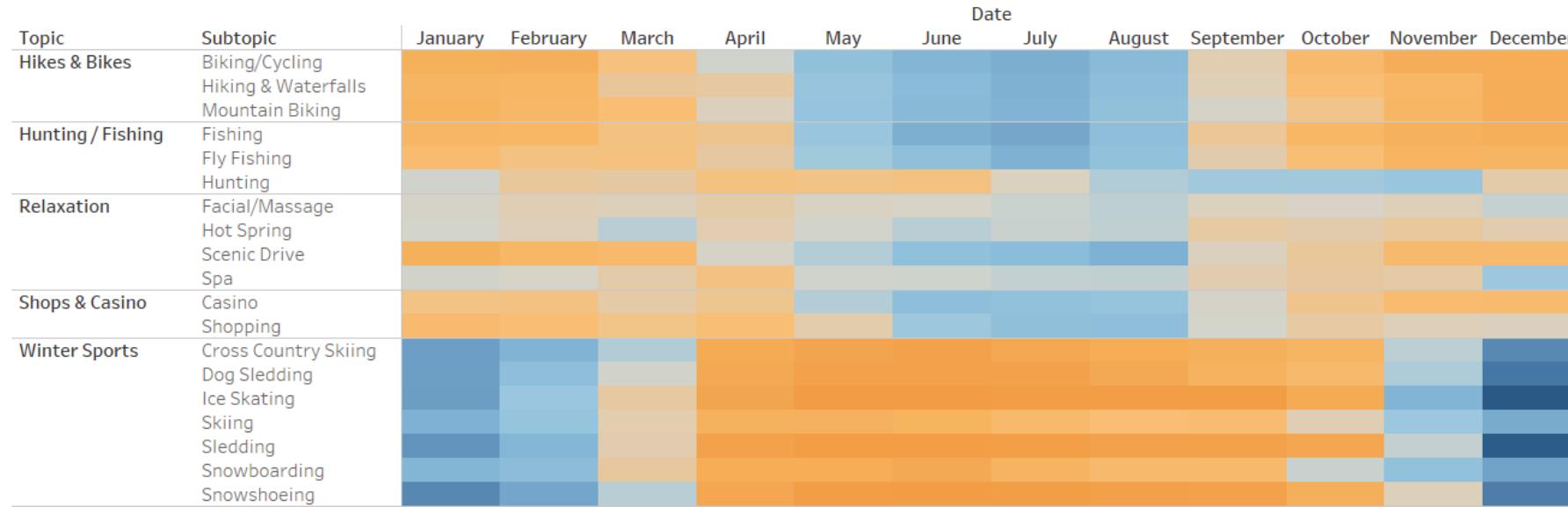
Growth Type
1 - Strong Growth
2 - Growing
3 - Flat
4 - Declining
5 - Steep Decline



# Activity Seasonality



# Activity Seasonality - cont'd





# Activity Subtopics: Bend Dominates

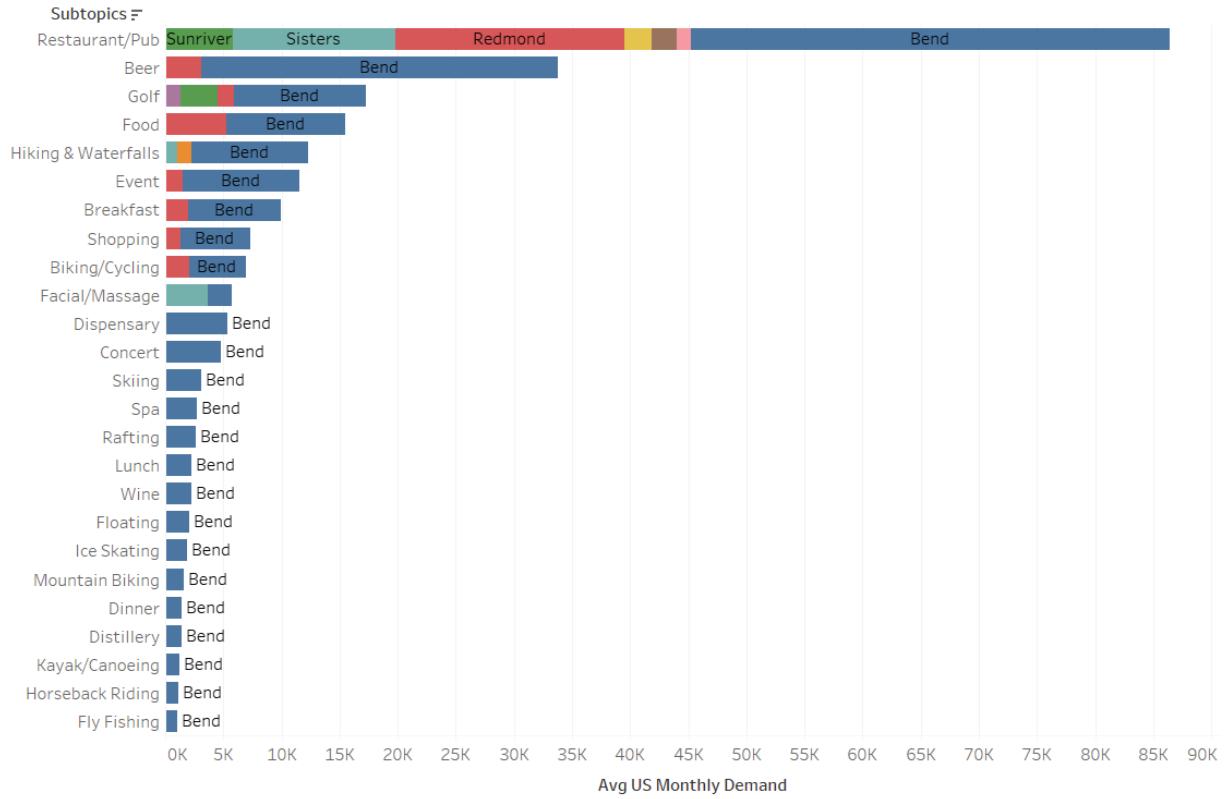
Subtopics shown have at least 1,000 monthly searches.

Bend dominates the activity landscape.

General restaurants/pubs have the highest search interest, followed by beer, then golf.

Top Activity YoY Growth Stats:

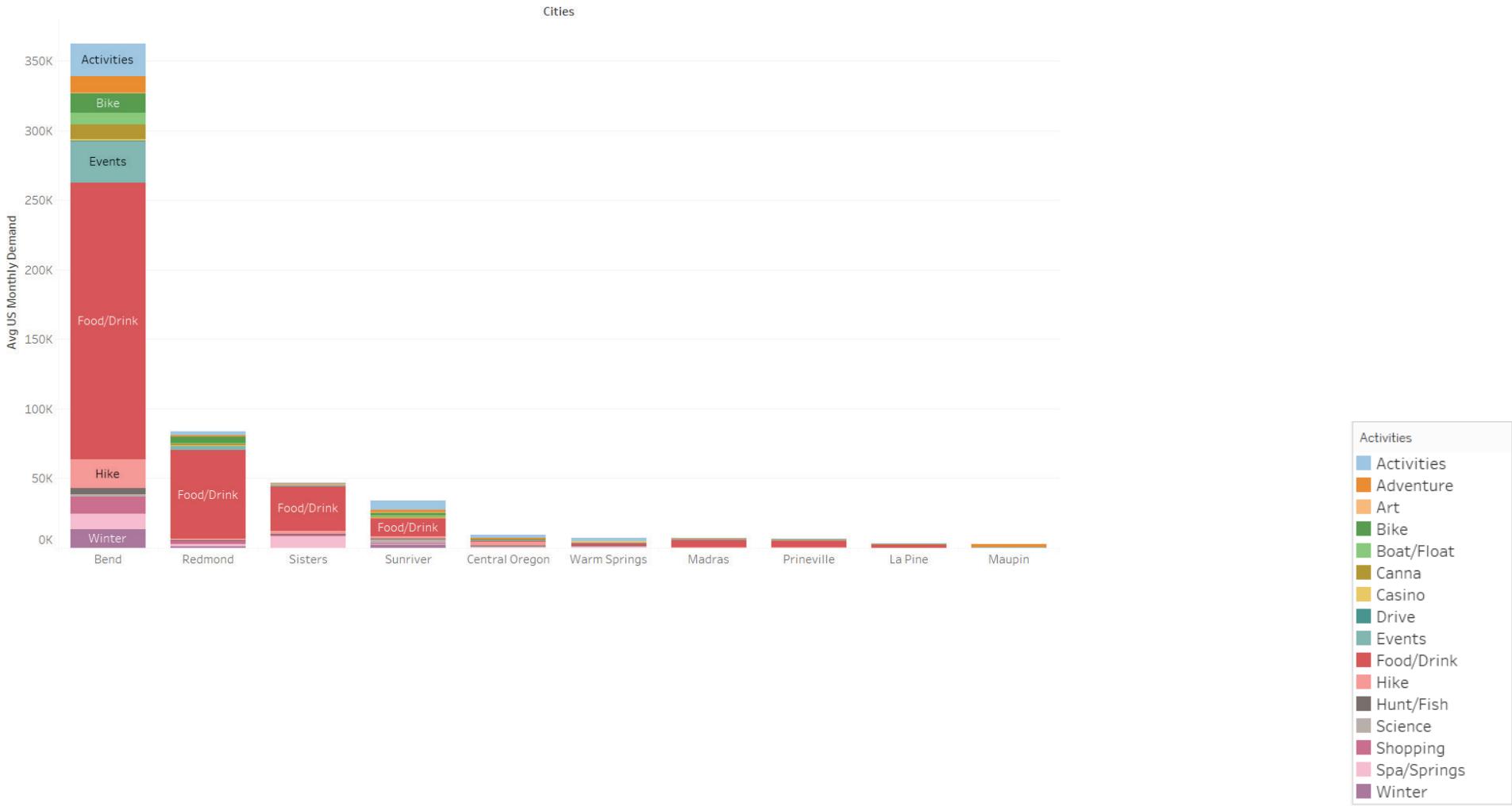
- Restaurant/Pub +0%
- Beer -12%
- Golf +32%
- Hikes/Waterfalls +21%
- Events -48%
- Breakfast -12%
- Shopping -2%
- Biking +37%



Searcher Intent Modeling

# Activities Subtopics Search Detail

# Activities by City





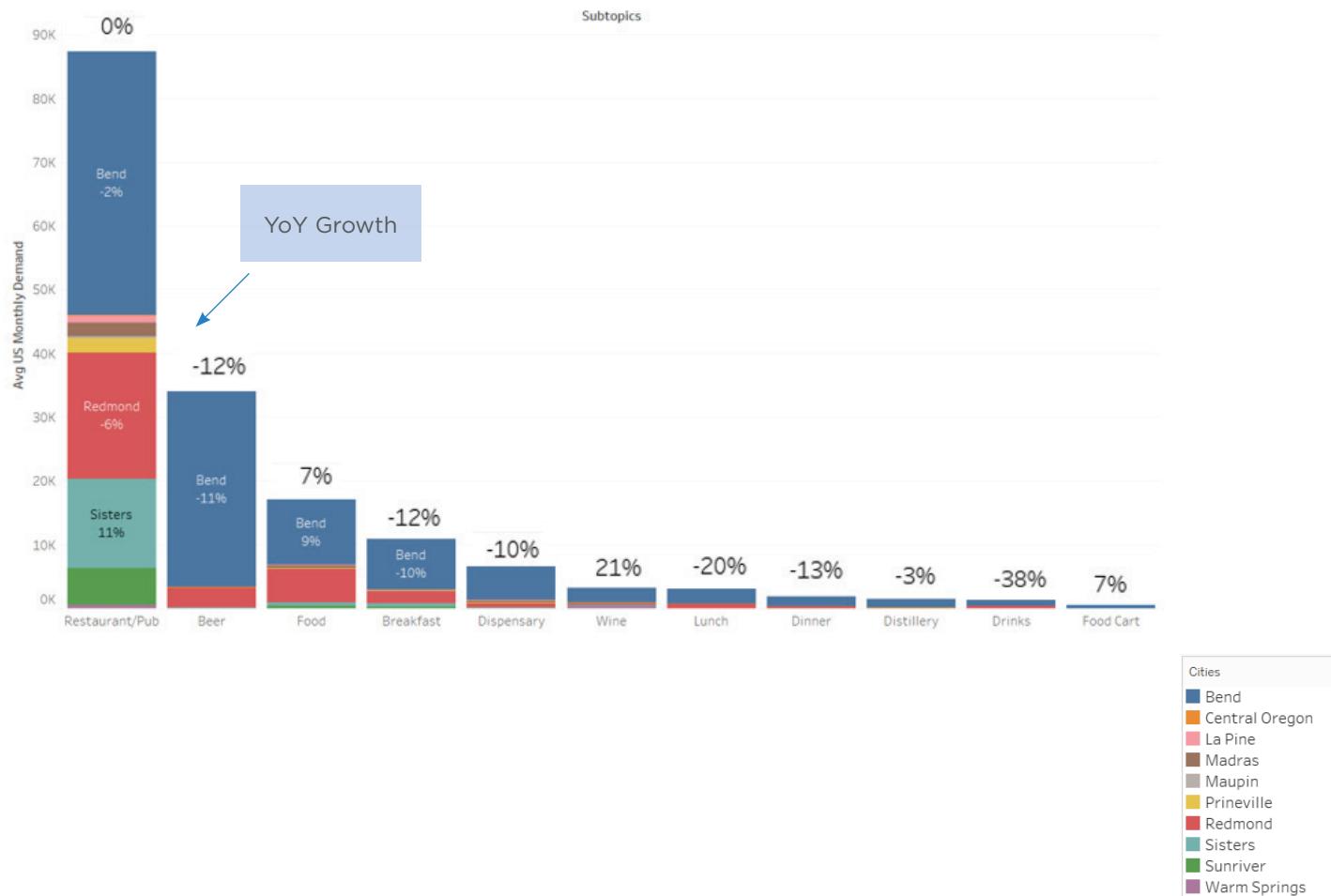
# Food, Drink, & Weed

Restaurant/Pub is the top area of interest in the entire landscape.

Redmond may have an Oregon or Washington intent as there are mixed results for Redmond keywords.

Most of the food/drink/weed landscape is flat or declining YoY, except for wine which is growing 21% YoY.

Searchers want to eat when they visit Central Oregon, and Bend has the highest search interest around food, weed and drinks.





# Food/Drink - Keyword Growth



Growth Type
1 - Strong Growth
2 - Growing
3 - Flat
4 - Declining
5 - Steep Decline



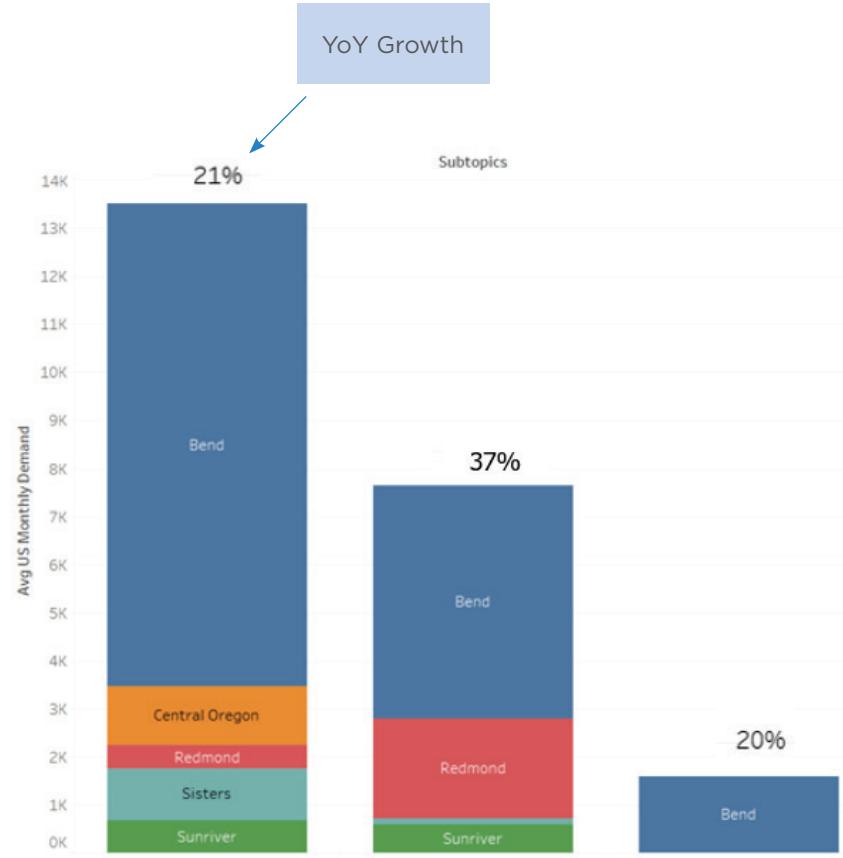
# Hikes & Bikes

Bend is the top city for hikes and bikes.

Hiking and Waterfalls has almost twice as much search volume as general biking/cycling, but biking/cycling saw a higher YoY growth.

Waterfalls makes up 20% of the hiking/waterfalls landscape and both are growing at the same rate.

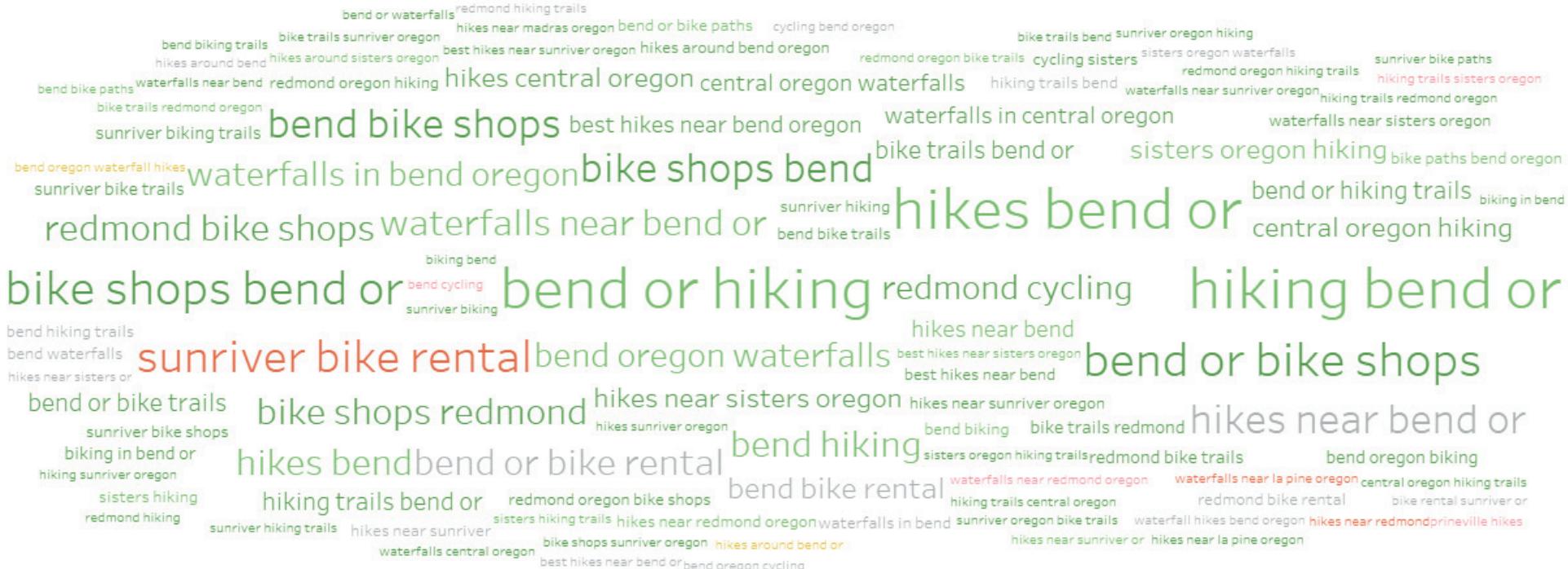
Bend is the only city in Central Oregon associated with mountain biking in this landscape.



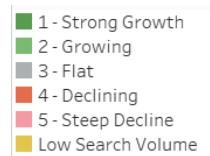
Cities
Bend
Central Oregon
La Pine
Madras
Maupin
Prineville
Redmond
Sisters
Sunriver
Warm Springs



# Hikes & Bikes - Keyword Growth



Keywords shown are sized by average search volume, colored by YoY growth. Keywords displayed have at least 20 monthly searches and up to 1,600 monthly searches

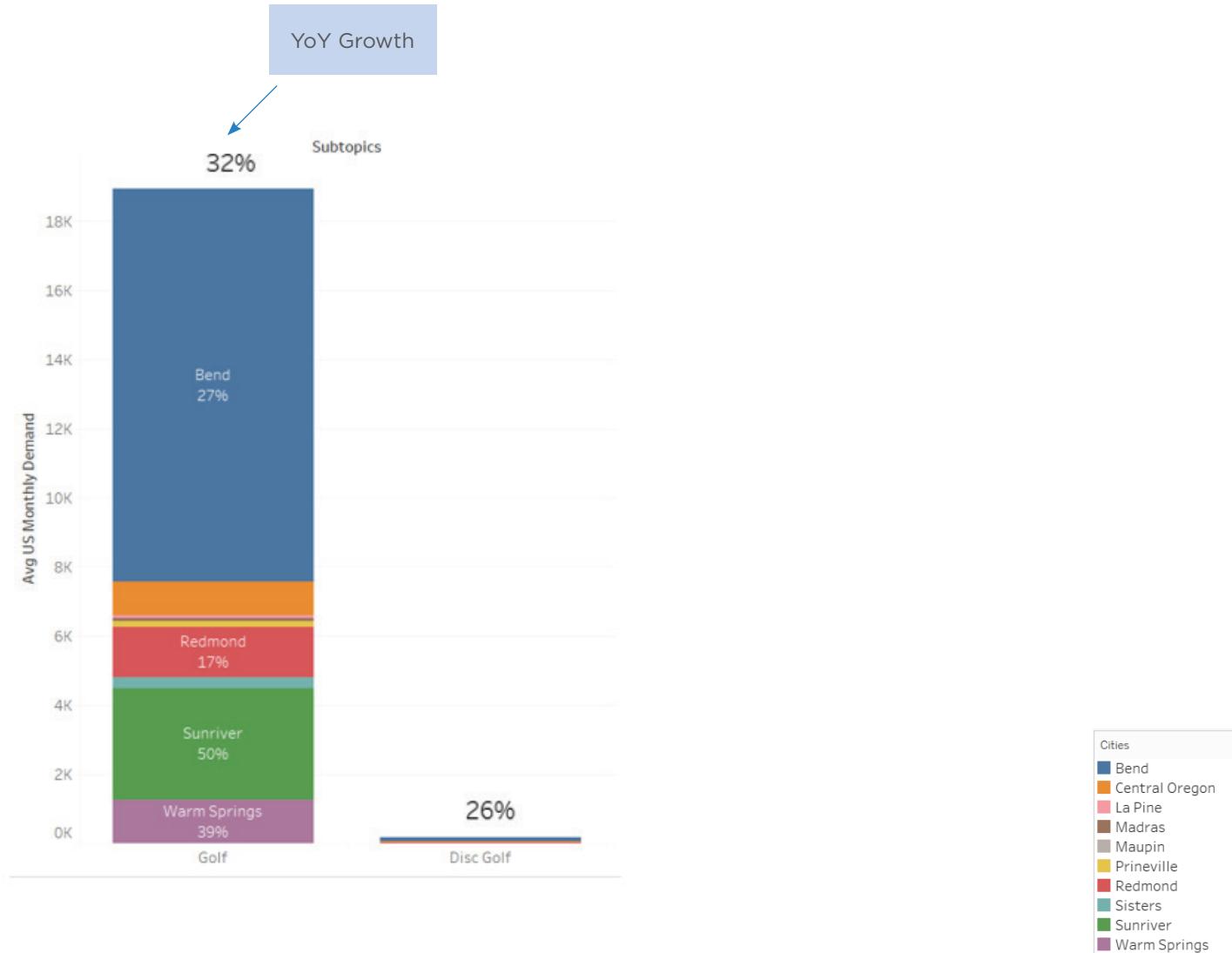




# Golf & Disc Golf

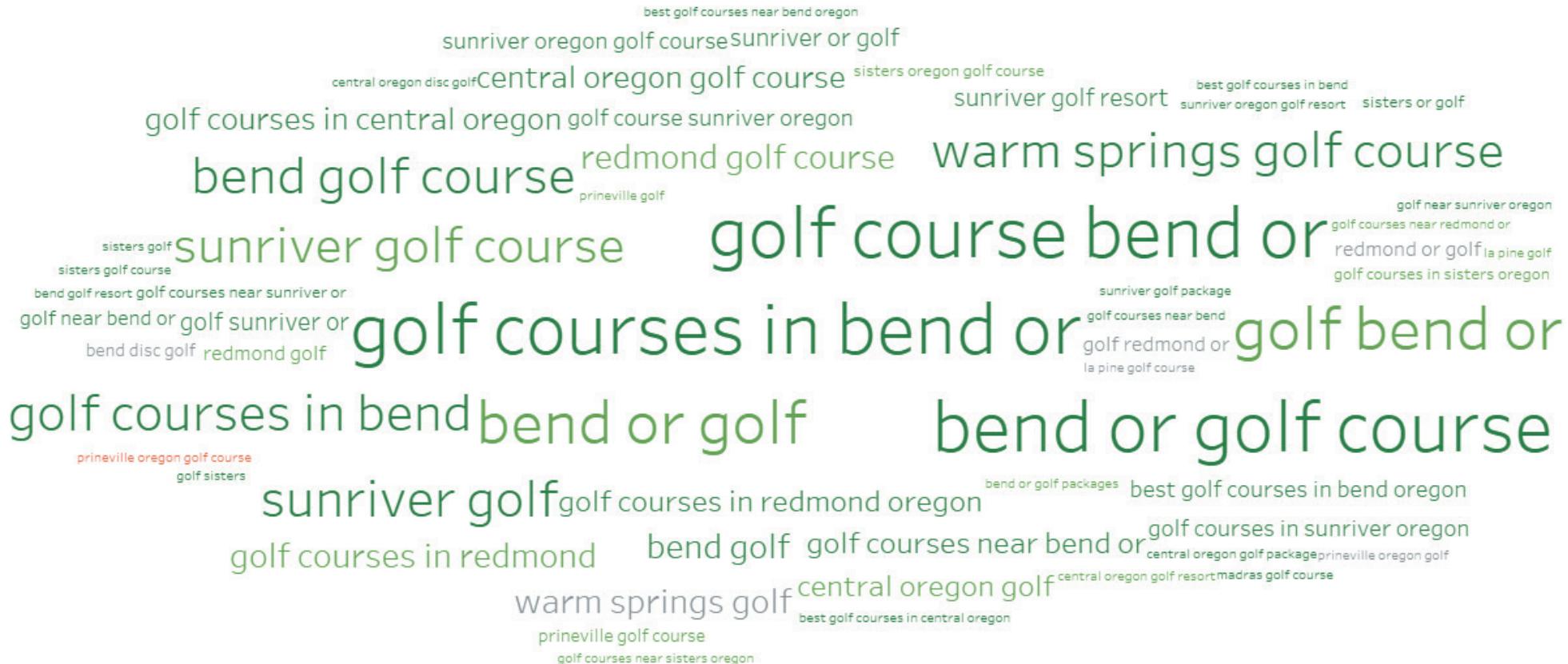
Overall golf in Central Oregon is growing 32% YoY and has over 112X more search volume than Disc Golf.

While Bend has the most interest around golf, Sunriver golf is growing at a faster rate of 50% YoY.





# Golf - Keyword Growth



Growth Type
1 - Strong Growth
2 - Growing
3 - Flat
4 - Declining

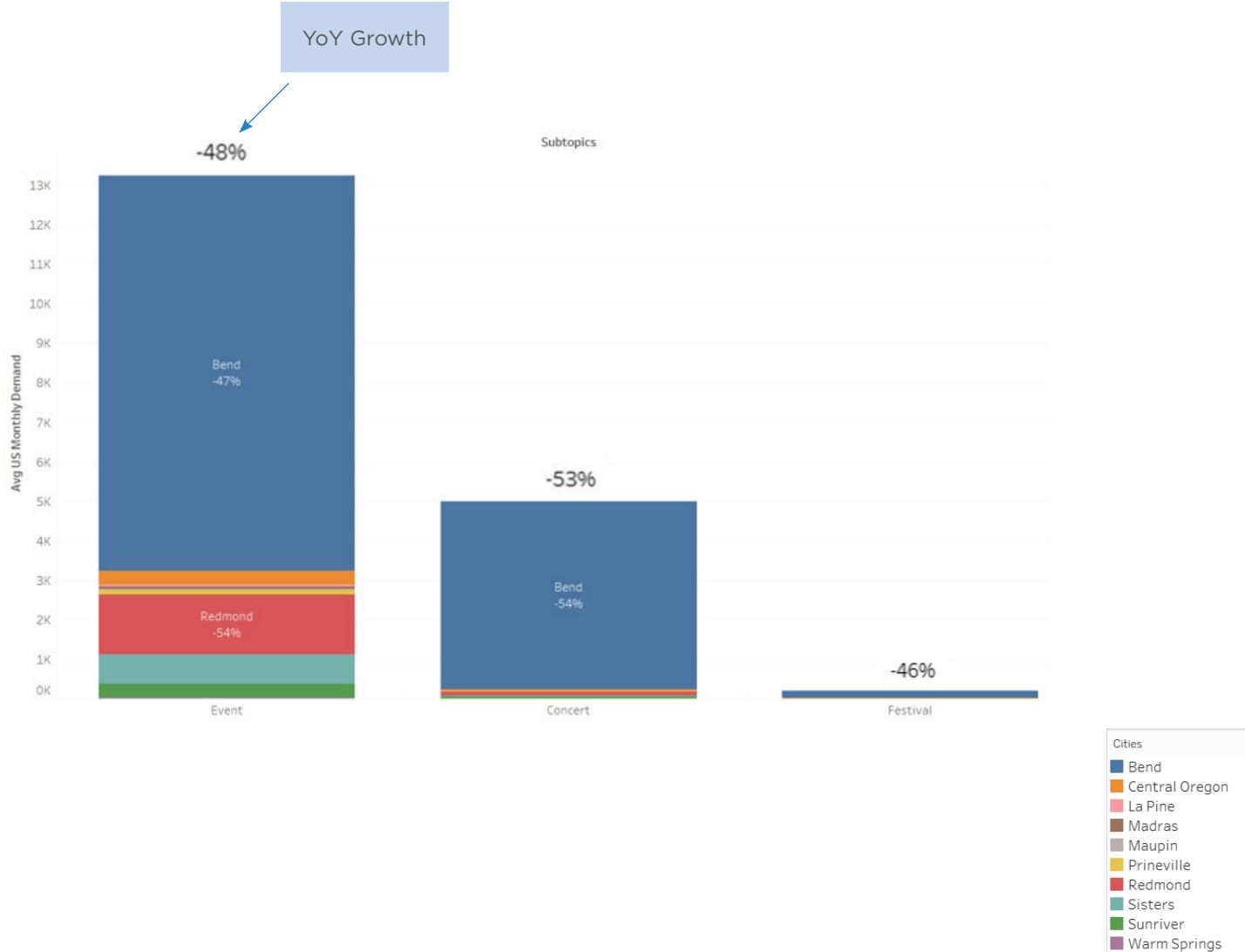


# Events

Bend is the top area associated with general events.

Events is the preferred language compared to concerts and festivals (when searchers are not searching specific events/concerts).

Events, Concerts and Festivals have a strong decline in YoY search trends due to Covid-19.





# Events - Keyword Growth



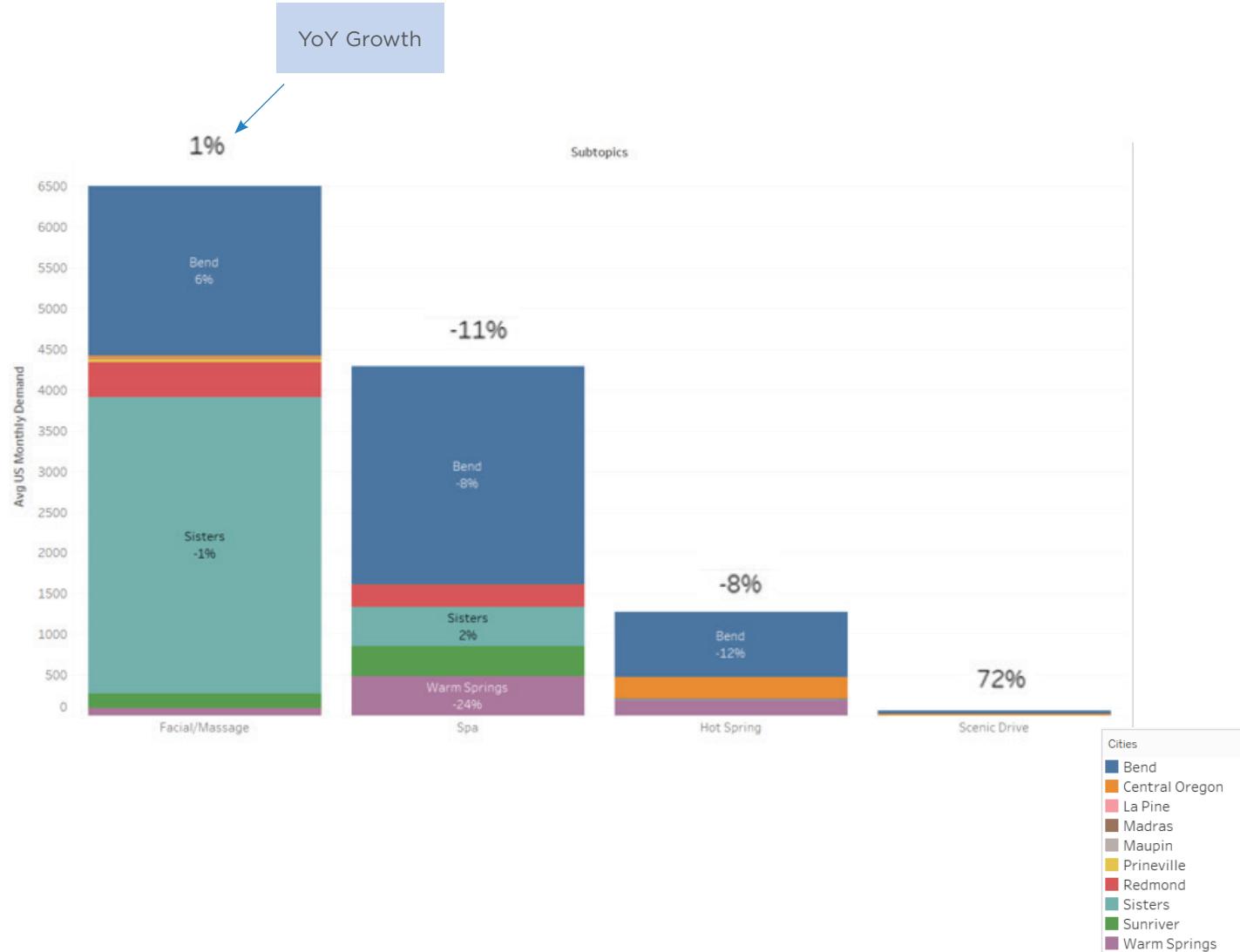


# Relaxation

Facial/massage is the top performing subtopic within 'relaxation' and Sisters leads the pack for facial/massage.

Facial/massage is flat YoY and spa is declining 11% YoY, most likely due to the shutdown in Spring.

Scenic drives have low search volume but are trending up significantly YoY.





# Relaxation - Keyword Growth



Keywords shown are sized by average search volume, colored by YoY growth. Keywords displayed have at least 20 monthly searches and up to 2,900 monthly searches

Growth Type
1 - Strong Growth
2 - Growing
3 - Flat
4 - Declining
5 - Steep Decline
Low Search Volume

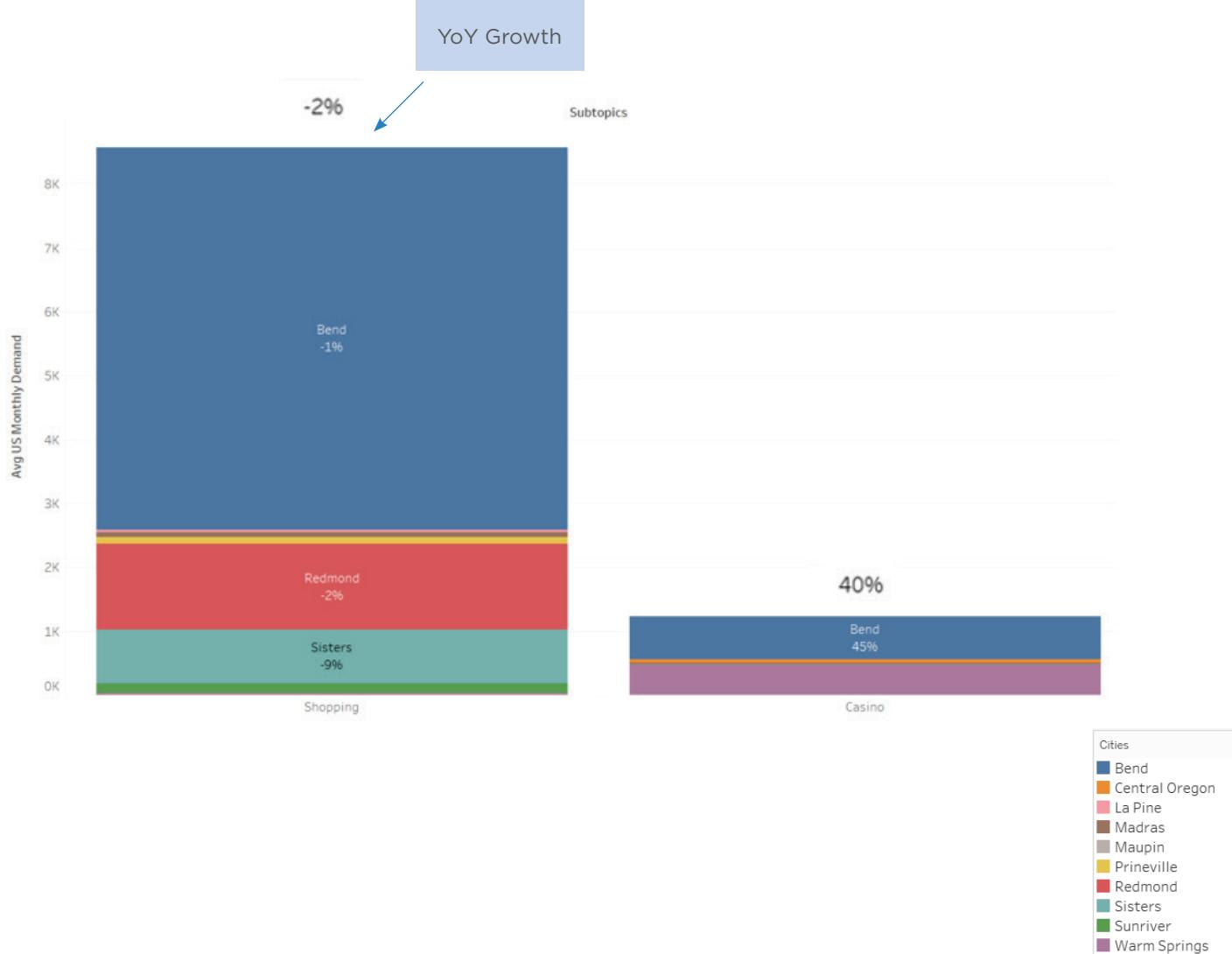


# Shops & Casino

Shopping has 8X more search volume than Casino.

Shopping is mostly associated with Bend, followed by Redmond, then Sisters.

Casino has seen a 40% growth YoY and is associated with Bend and Warm Springs.





# Shops/Casino – Keyword Growth



Growth Type
1 - Strong Growth
2 - Growing
3 - Flat
4 - Declining
5 - Steep Decline
Low Search Volume

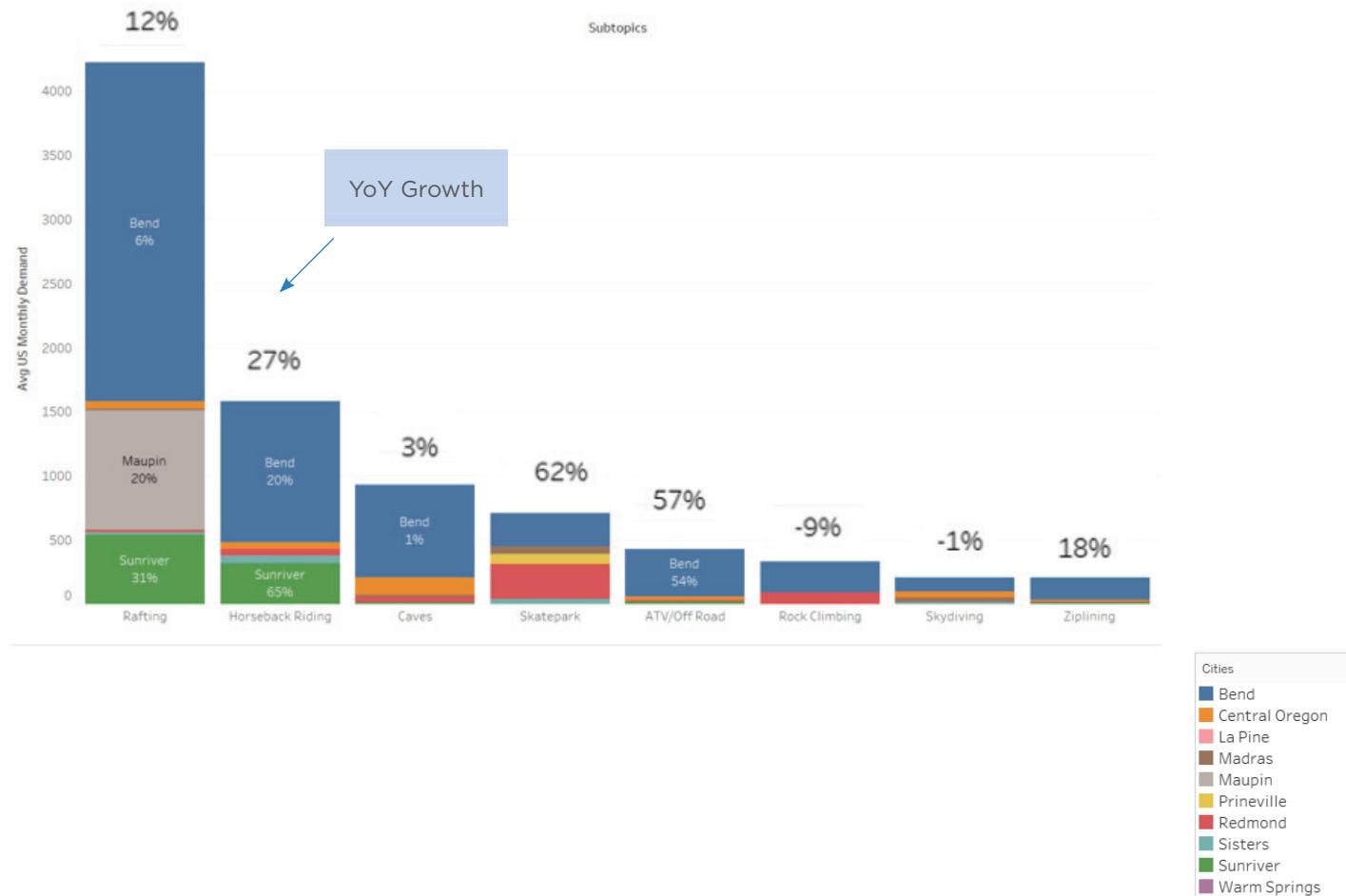


# Adventure

Rafting is the top subtopic within the adventure landscape. It could have been organized into boats/floats but wanted to compare it to other adventure activities.

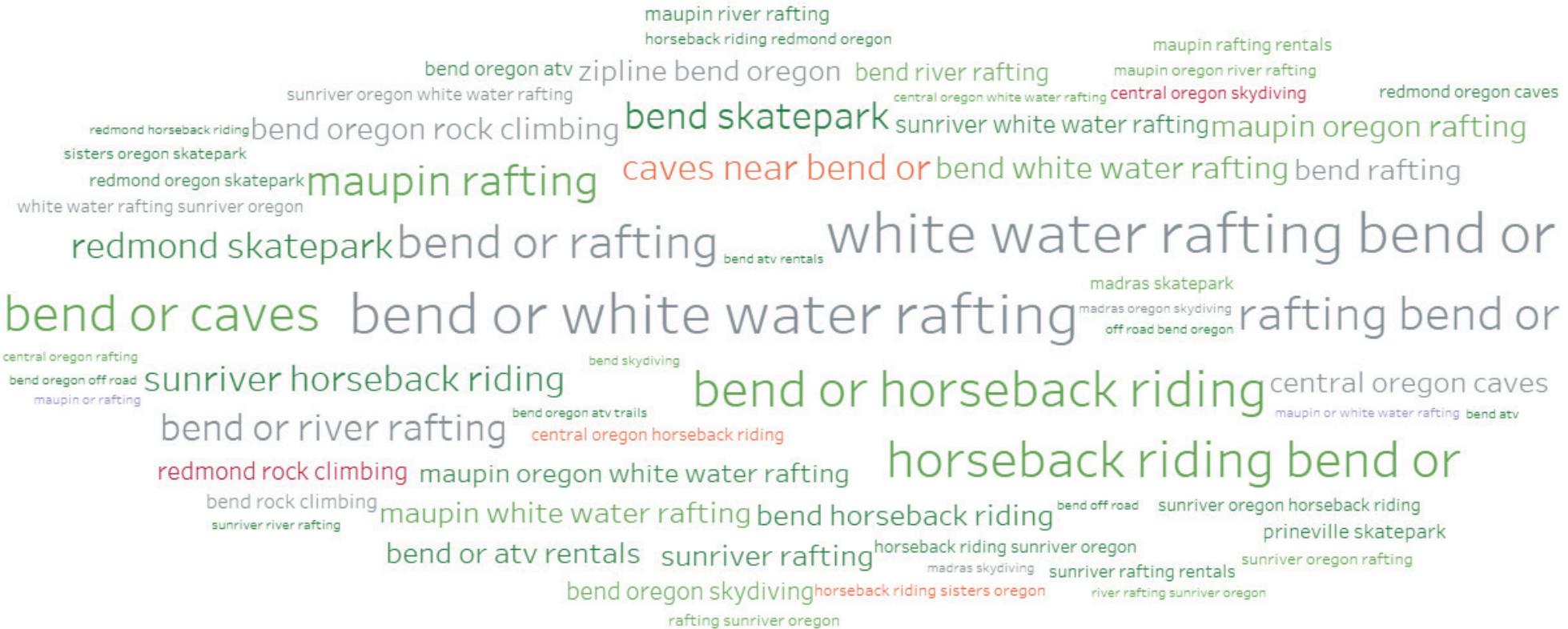
Rafting has almost 2X more search volume than floating the river

Horseback riding was the next searched area with the top searches in Bend and Sunriver followed by Caves.





# Adventure - Keyword Growth



Keywords shown are sized by average search volume, colored by YoY growth. Keywords displayed have at least 20 monthly searches and up to 600 monthly searches



# Winter Sports

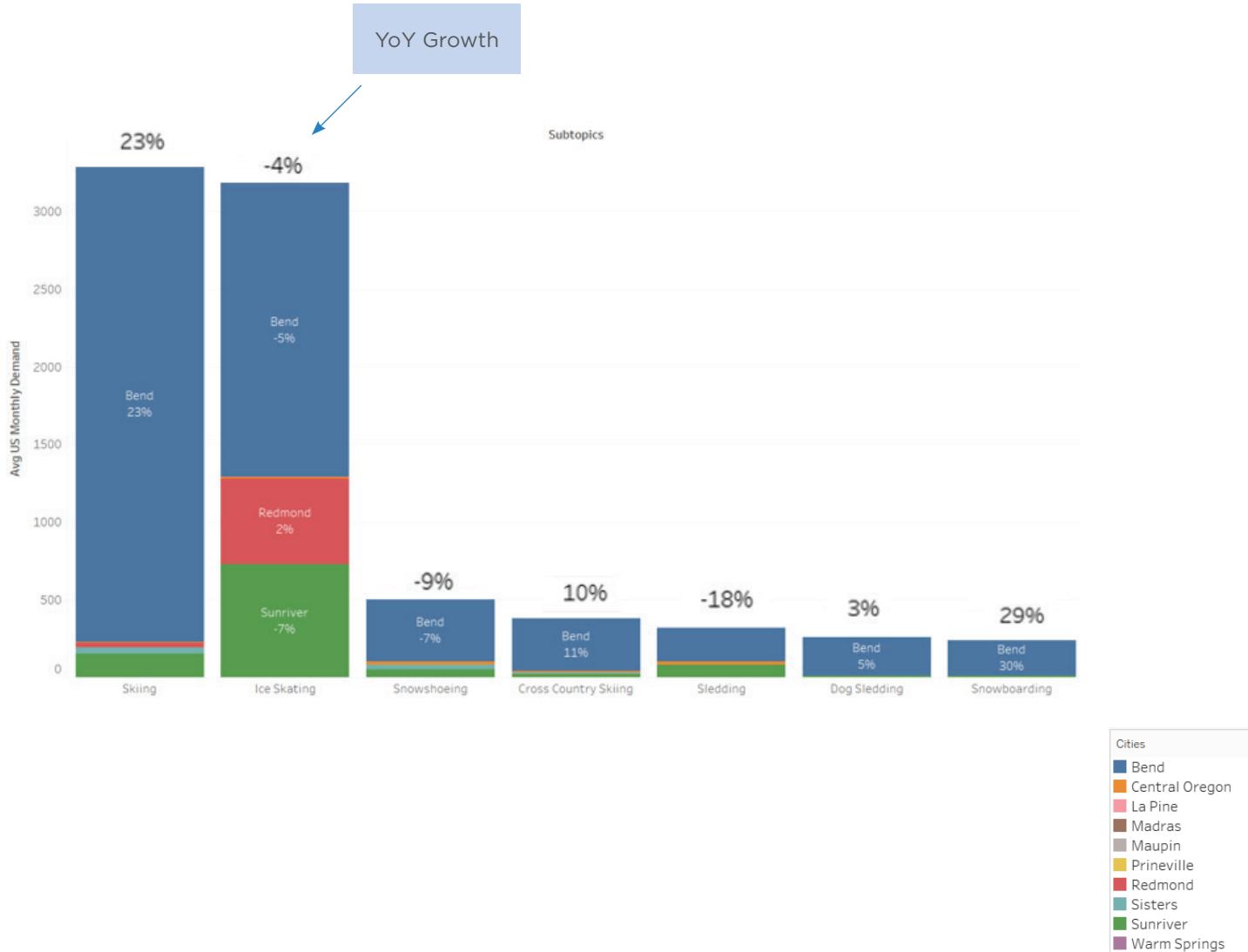
This landscape looks at winter sports associated with Central Oregon cities. This landscape does not include 'mt. bachelor' searches.

We don't have winter sports in a Covid-19 era data yet, so this shows growth/decline on non-Covid years.

Bend is the top city associated with winter sports followed by Sunriver.

Skiing and Ice Skating are the top activities.

We expect to see a surge in outdoor winter sports this winter as more people are looking to social distance.





# Winter Sports - Keyword Growth



Keywords shown are sized by average search volume, colored by YoY growth. Keywords displayed have at least 20 monthly searches and up to 900 monthly searches





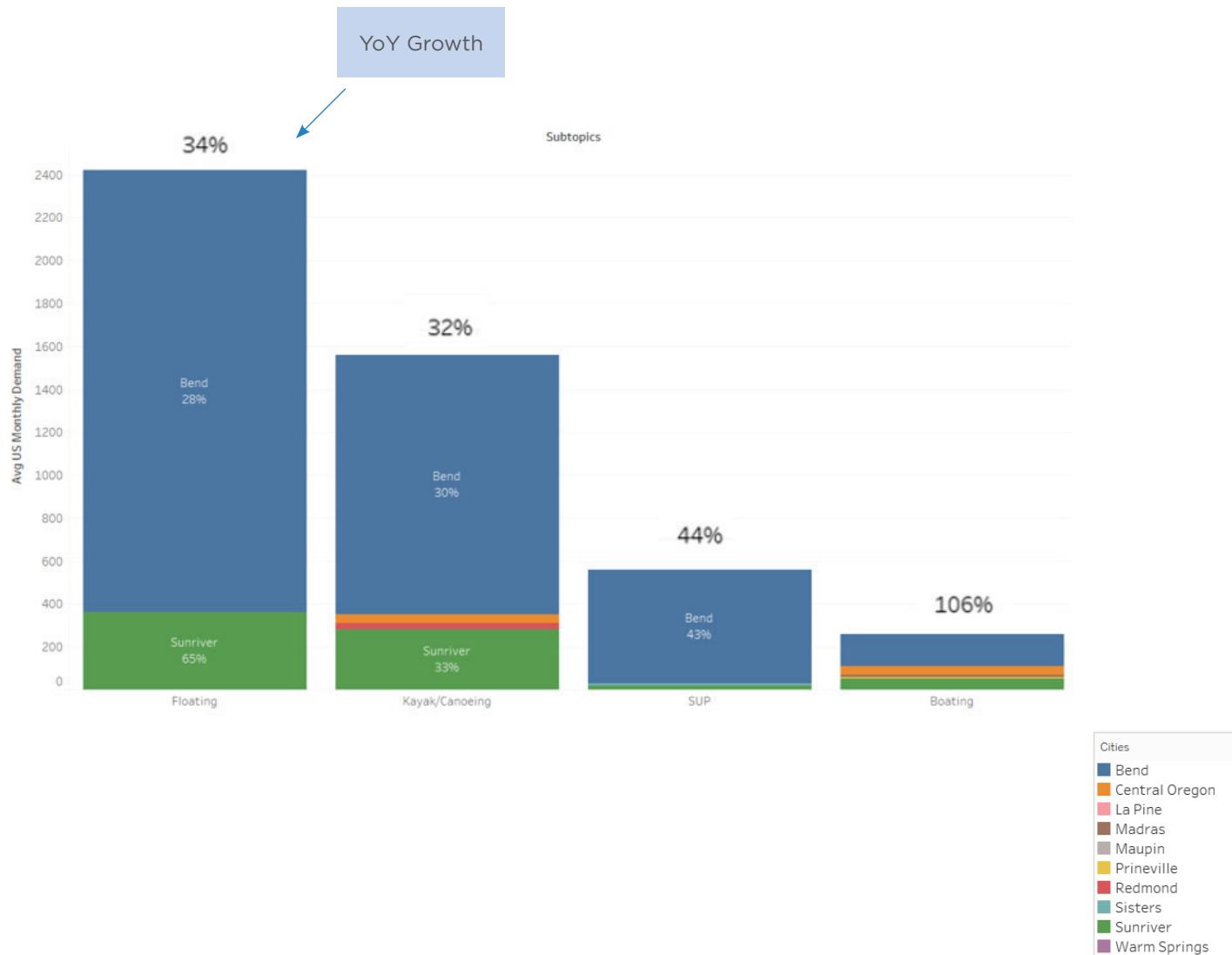
# Boats & Floats

Rafting was shown in ‘adventure activities’ and has almost twice the search volume as floating.

All areas in boats and floats have steep growth YoY and are mostly associated with Bend, followed by Sunriver.

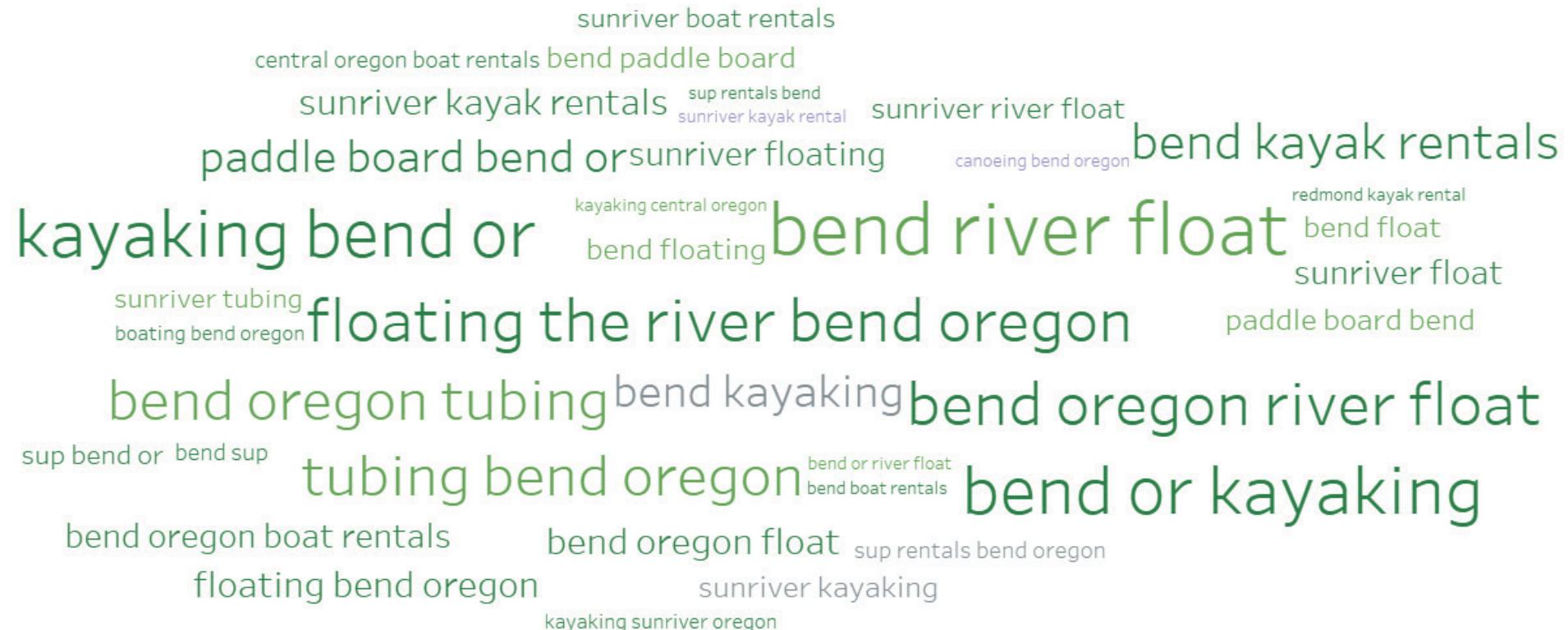
The reduction in float rental services did not reduce the search demand in floating.

Kayaks and Canoes have 2X more search volume than SUPs in this local non-brand landscape.





# Boats & Floats - Keyword Growth



Keywords shown are sized by average search volume,  
colored by YoY growth. Keywords displayed have at least  
20 monthly searches and up to 500 monthly searches

Growth Type
1 - Strong Growth
2 - Growing
3 - Flat
Low Search Volume

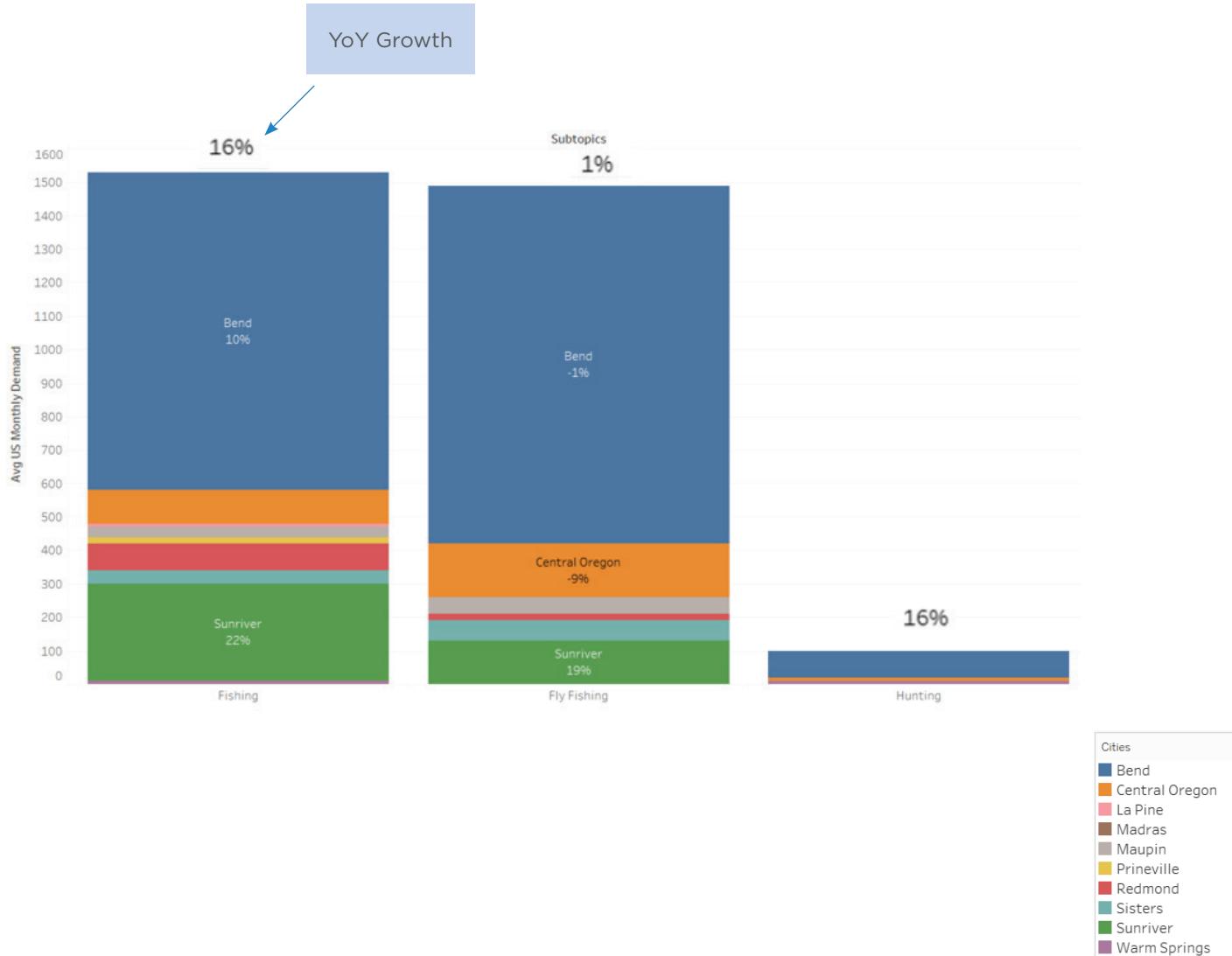


# Hunting/Fishing

Fishing and Fly Fishing dominate this landscape over hunting.

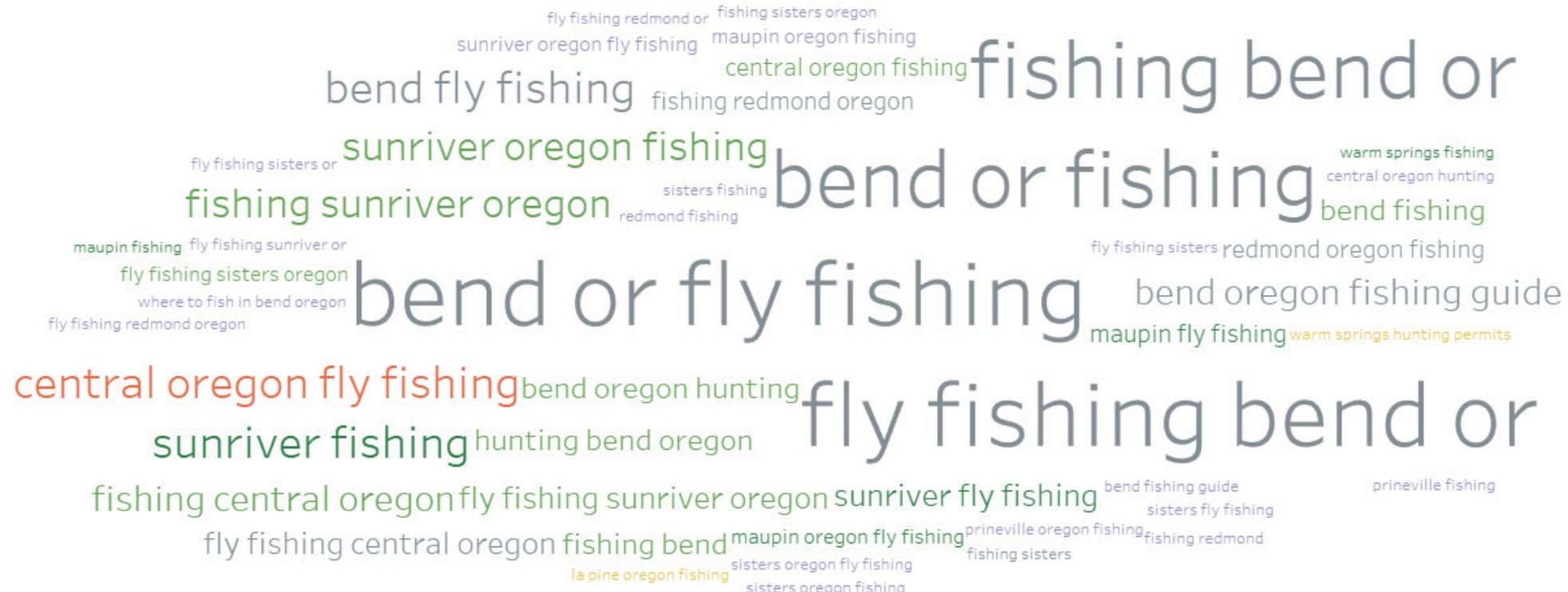
General fishing and fly fishing have similar search interest, yet we are seeing higher YoY growth in fishing.

This data was pulled through August of 2020, and fly fishing has higher seasonality in fall months, so we expect to see a higher growth rate in fly fishing as that is an activity that can be done well in social distancing.





# Hunting/Fishing - Keyword Growth



Keywords shown are sized by average search volume, colored by YoY growth. Keywords displayed have at least 10 monthly searches and up to 500 monthly searches

Growth Type
1 - Strong Growth
2 - Growing
3 - Flat
4 - Declining
Emerging Keyword
Low Search Volume

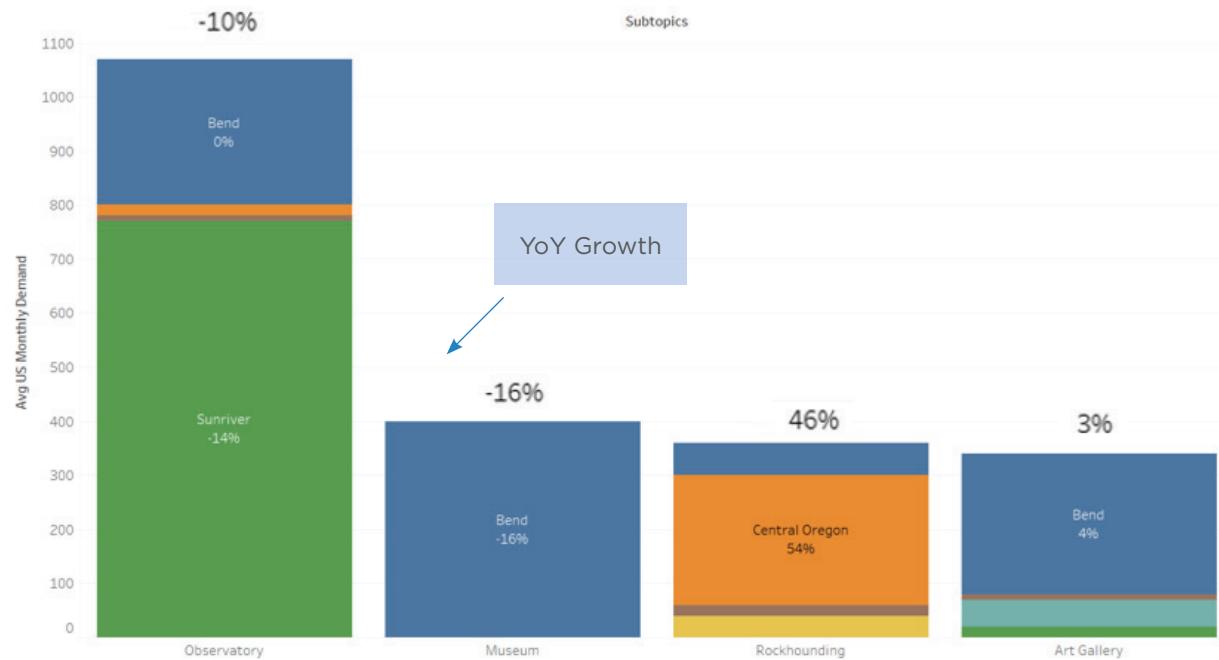


# Art/Science

Arts and Science as a whole has much lower search volume than other activities in this landscape.

Rockhounding is the top activity with YoY growth (+46%) and is mostly associated with Central Oregon.

Observatory is mostly associated with Sunriver and is declining YoY.



Cities
Bend
Central Oregon
La Pine
Madras
Maupin
Prineville
Redmond
Sisters
Sunriver
Warm Springs



# Art/Science - Keyword Growth



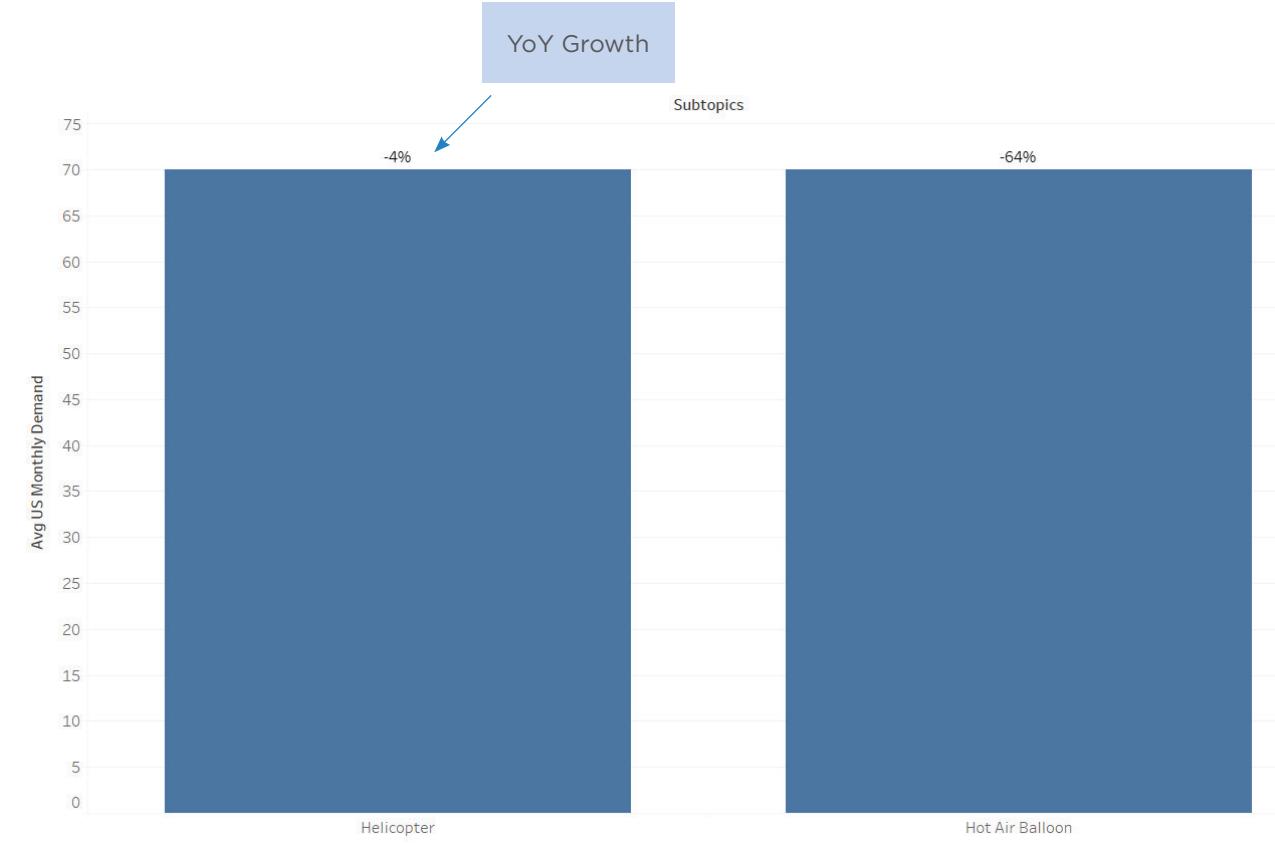
Growth Type
1 - Strong Growth
2 - Growing
3 - Flat
4 - Declining
Emerging Keyword
Low Search Volume



# Aerial

Aerial tours are only associated with Bend in this landscape.

Helicopter tours are flat while hot air balloon rides/tours have a steep decline, most likely due to the cancellation of balloons over bend.





## Aerial - Keyword Growth

helicopter rides bend oregon

helicopter tours bend oregon

bend oregon hot air balloon

bend helicopter tours

bend oregon helicopter tours    bend hot air balloon

Keywords shown are sized by average search volume,  
colored by YoY growth. Keywords displayed have at least  
10 monthly searches and up to 50 monthly searches

Growth Type  
■ 5 - Steep Decline  
■ Low Search Volume