



Cultural Heritage Travelers Versus Non-Cultural Heritage Travelers

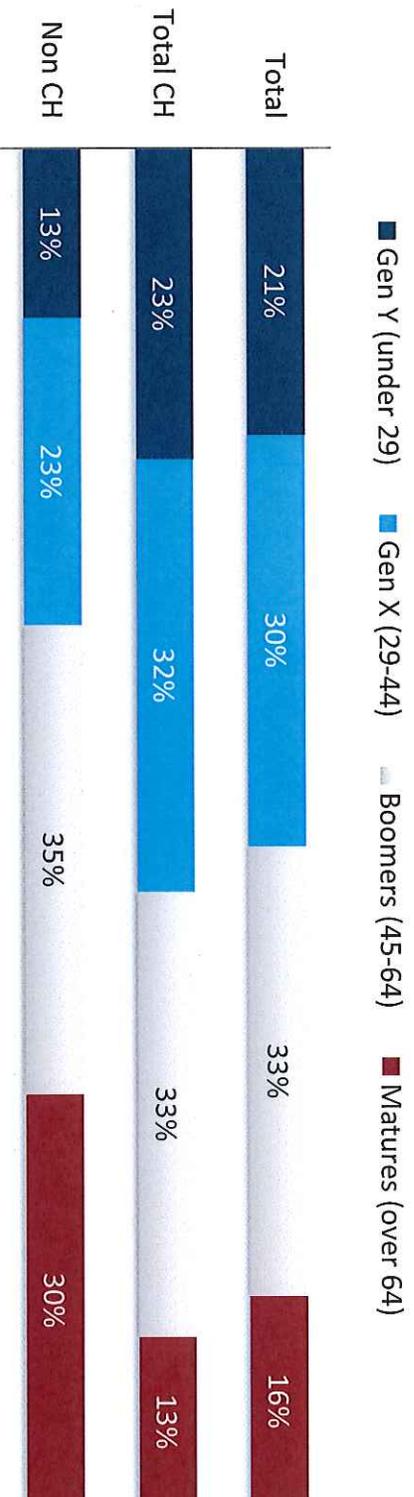
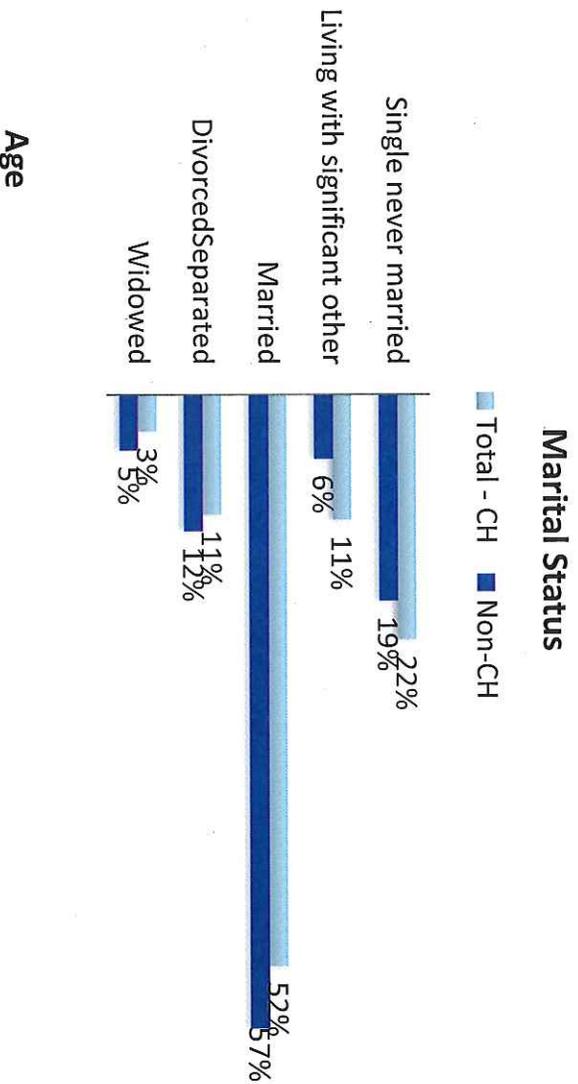




Demographics

Cultural and Heritage Traveler Demographics

	Total	Total CH	Non CH
Sample Size	2000	1662	338
Gender			
Male	49%	49%	52%
Female	51%	51%	48%
Race			
White/Caucasian	83%	82%	90%
Black/African-American	3%	3%	3%
Asian/Pacific islander	10%	11%	5%
Native American	3%	3%	3%
Something else	3%	4%	2%

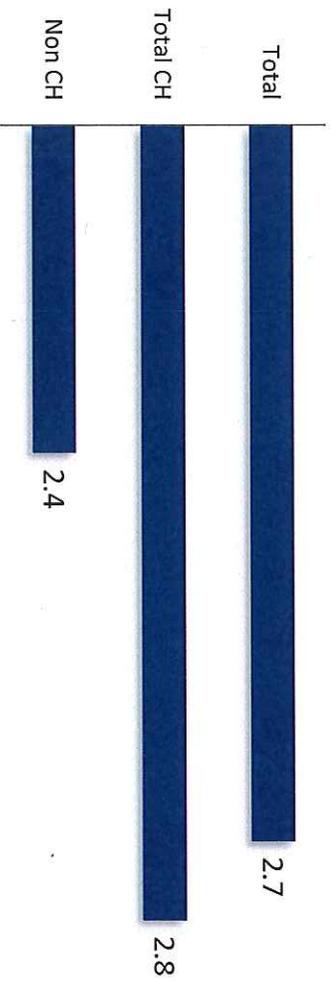


D57B. What is your gender?
 D58. What is your age?

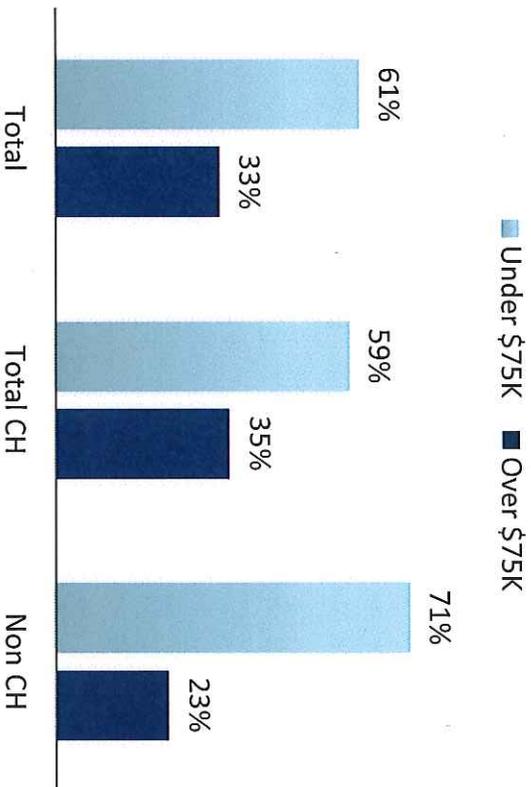


Cultural and Heritage Traveler Demographics

Household Size Mean



Household Income



Q62. Please indicate your household size, or the number of people there are in your household?
 D65. What was your TOTAL household income in 2011 before taxes?



Cultural and Heritage Traveler Demographics

Education	Total - CH	Non-CH
Less than 9th grade	0%	1%
9th to 12th grade no diploma	2%	2%
High School Graduate or GED	14%	25%
Some college no degree	31%	24%
Associates Degree	13%	15%
Bachelors Degree	27%	23%
Graduate or Professional Degree	13%	10%

Employment	Total - CH	Non-CH
Employed Fulltime	45%	30%
Employed Part-time	13%	11%
Fulltime homemaker	9%	10%
Fulltime student	5%	3%
Self-employed	6%	8%
Retired	15%	28%
Unemployed	5%	8%



D66. What is the highest level of education that you personally have completed?

D67. What is your current employment status?

D63 Do you have any children 18 years of age or younger living in your household?



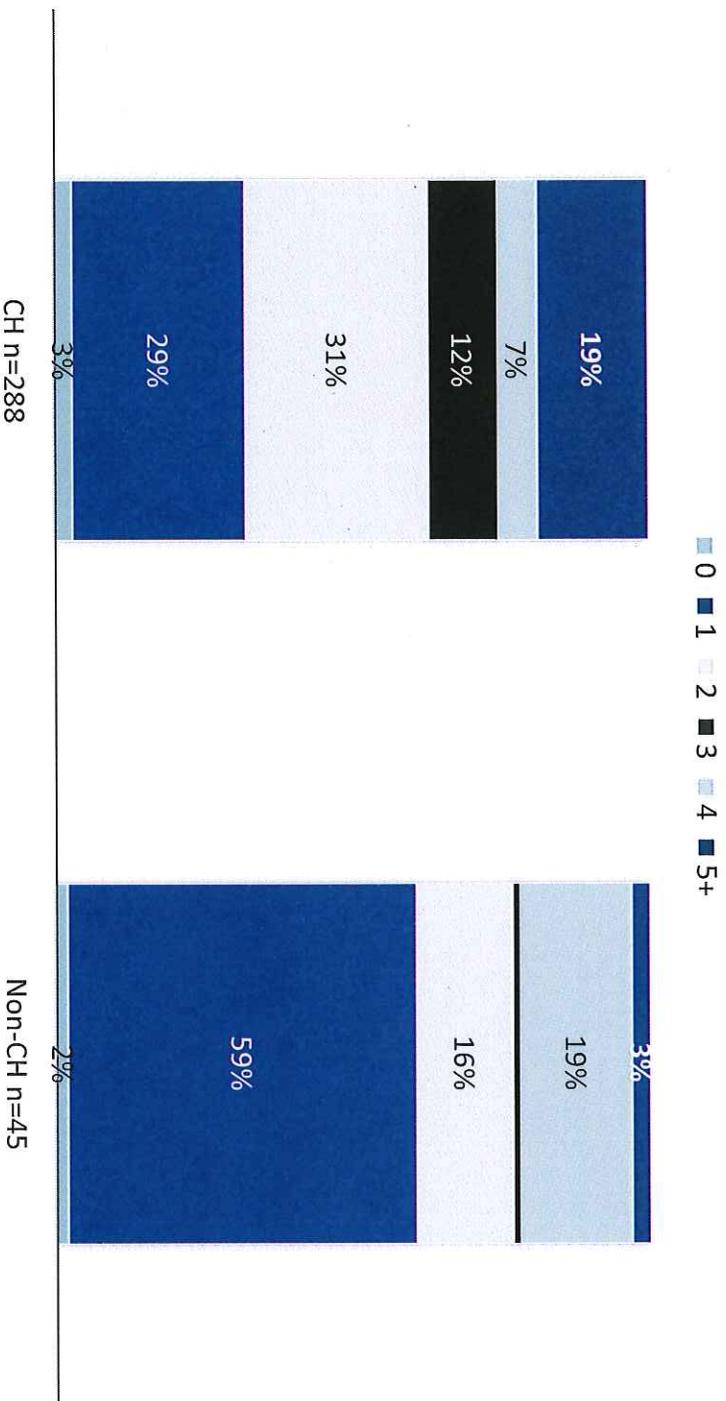


Travel To and Within Oregon



Six Out of Ten Cultural and Heritage Travelers Take One or Two Trips to Oregon Annually

Leisure Trips Taken Annually to State of Oregon



Q9b: How many trips for leisure do you take each year in the state of Oregon?

Oregon Assets Are Varied: Traditional Cultural Assets Are Deeply Embedded in the Minds of Travelers

Awareness of Oregon CH Assets	Sample Size	CH	Non CH
The Oregon Trail	1662	62%	56%
Mt Hood	58%	54%	59%
Crater Lake	46%	49%	49%
Columbia River Gorge	44%	40%	40%
Oregon Public Beaches	40%	31%	31%
Coastal Lighthouses	38%	22%	22%
Oregon Wineries	38%	30%	30%
Oregon Caves	38%	34%	34%
Portland Rose Festival	35%	30%	30%
Multnomah Falls	31%	24%	24%
Oregon Shakespeare Festival Ashland	29%	15%	15%
Portland Art Museum	29%	18%	18%
Oregon Microbreweries	25%	15%	15%
Covered Bridges	25%	28%	28%
Pendleton Roundup	24%	21%	21%
Hay Stack Rock at Cannon Beach	24%	20%	20%
Timberline Lodge	23%	15%	15%
Fort Clatsop Lewis and Clark expedition	22%	18%	18%
Windsurfing in Hood River	20%	14%	14%
John Day Fossil Beds	17%	12%	12%
Bandon Dunes Golf Courses	16%	8%	8%
Cycle Oregon	16%	9%	9%
Smith Rock Band	16%	13%	13%
Painted Hills	16%	13%	13%
None of the above	11%	17%	17%

This is true whether the traveler has visited Oregon or not. These varied assets can be used to Oregon's advantage, especially as they relate to the well-rounded and passionate segments.

Q41: Which of the following are you aware of in Oregon? Please select all that apply.



These Same Historical and Traditional Assets Are Those That Most Closely Represent Oregon in the Minds of the Traveler

Most Closely Represent Oregon	Sample Size	CH	Non CH
The Oregon Trail	1662	26%	23%
Mt. Hood		22%	24%
Crater Lake		21%	19%
Oregon's public beaches		19%	19%
Columbia River/Gorge		15%	17%
Coastal Lighthouses		12%	8%
Oregon Caves		10%	12%
Multnomah Falls		9%	8%
Portland Rose Festival		7%	9%
Oregon Wineries		8%	4%
Oregon Shakespeare Festival (Ashland)		7%	6%
Hay Stack Rock at Cannon Beach		6%	5%
Fort Clatsop (Lewis and Clark expedition)		5%	3%
Oregon Microbreweries		4%	5%
Portland Art Museum		4%	3%
Painted Hills		3%	5%
Timberline Lodge		3%	6%
Covered Bridges		3%	3%
Pendleton Roundup		2%	8%
Cycle Oregon		3%	3%
Smith Rock (Bend)		2%	3%
Bandon Dunes Golf Courses		2%	3%
John Day Fossil Beds		2%	1%
Windsurfing in Hood River		2%	1%

Historic properties, such as Timberline Lodge, are not well represented in the minds of the travelers. However, an opportunity exists to increase marketing and advertising of assets that span multiple geographic areas such as public beaches and coastal lighthouses.

Q41b. From the above list, please rank the top 5 attractions/activities that most closely represent Oregon in your mind with 1 being the most representative and 5 being the least representative?

Oregon Beaches Rock: They Are Cited by All Travelers As Being the Most Impactful Attraction/Activity When Planning a Trip to Oregon

Greatest Impact When Planning OR Trip	Sample Size	CH	Non CH
Oregon's public beaches	1662	25%	338 22%
Crater Lake	20%	24%	
The Oregon Trail	17%	16%	
Mt. Hood	15%	17%	
Coastal Lighthouses	13%	11%	
Columbia River/Gorge	12%	17%	
Multnomah Falls	11%	11%	
Oregon Caves	10%	12%	
Oregon Wineries	10%	9%	
Portland Rose Festival	7%	7%	
Oregon Shakespeare Festival (Ashland)	7%	5%	
Oregon Microbreweries	6%	4%	
Hay Stack Rock at Cannon Beach	6%	4%	
Painted Hills	5%	5%	
Portland Art Museum	5%	3%	
Fort Clatsop (Lewis and Clark expedition)	5%	2%	
Covered Bridges	4%	4%	
Bandon Dunes Golf Courses	4%	7%	
John Day Fossil Beds	4%	2%	
Timberline Lodge	4%	3%	
Pendleton Roundup	3%	5%	
Smith Rock (Bend)	3%	3%	
Cycle Oregon	3%	3%	
Windsurfing in Hood River	3%	1%	

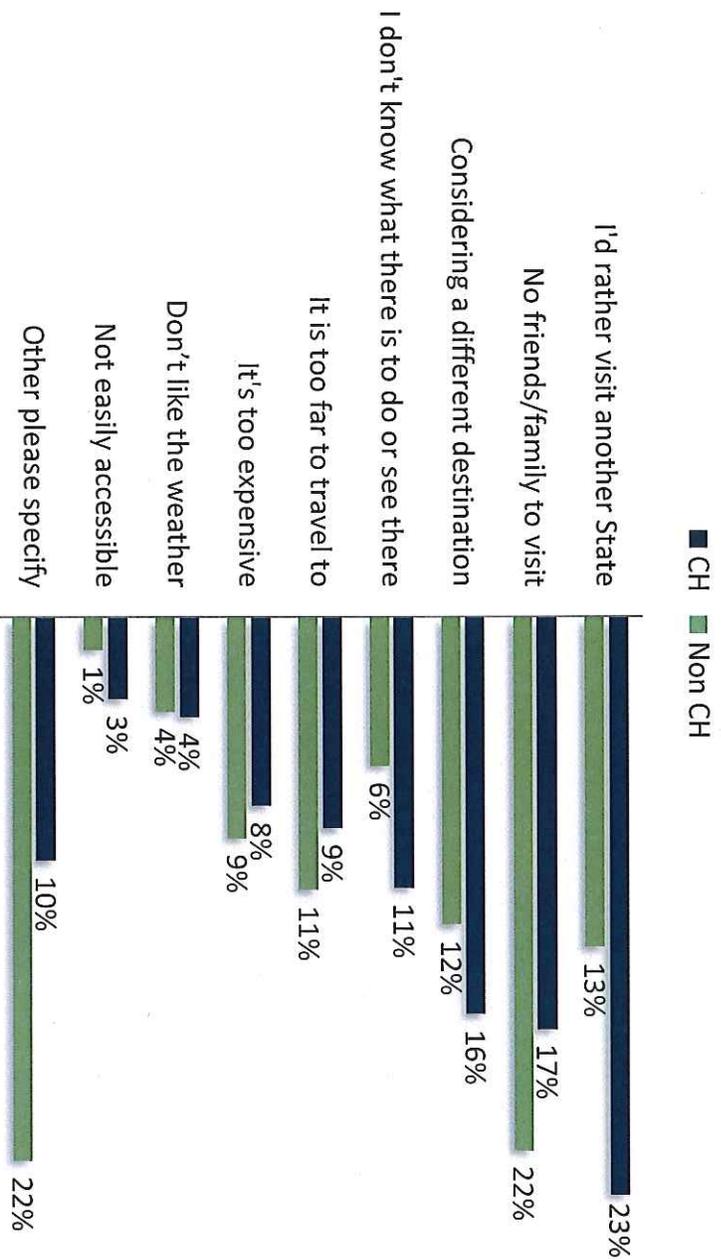
Crater Lake and the Columbia River Gorge have a slightly greater impact on planning for non CH travelers than for CH travelers.

41c. From the above list, please rank the top 5 attractions/activities that have the most impact on you when you are planning a trip to Oregon with 1 having the most impact and 5 having the least impact?



An Excellent Opportunity Exists to Educate Travelers About the Varied Activities Available in Oregon

Why Traveler May Not Consider a Trip to Oregon



Q43b: What's the primary reason you would not consider taking a trip to Oregon n=551



Regardless of Type of Traveler, the Pristine Coastlines and Natural Beauty of Oregon Prevails

Most Appealing About Oregon	CH	Non CH	
	Sample Size	701	145
Oregon Beaches/Coastline	22%	22%	
Landscape/Scenery/Natural Beauty	19%	26%	
Attractions (e.g., Light House/Mall/Historical Places/Skate-parks/Gardens/Bookstore/Lincoln City)	10%	6%	
Awesome/good ambience/atmosphere	10%	8%	
Visiting friends and family	9%	9%	
Mountains/Mount Hood/painted hills/ volcanic mountains/Haystack Rock	8%	4%	
Natural Attractions/diversity of attractions	7%	8%	
Walkable cities	6%	2%	
Shopping/Tax free shopping /No sales tax	6%	2%	
Love the Outdoors	6%	8%	
New things to see/something different/new place to explore	4%	5%	
Never been there before	3%	1%	
Friendly people/Nice Communities	3%	1%	
Outdoors/getting out into nature	3%	4%	
Trails / Exploring Oregon trails	3%	2%	
Beer/ Micro breweries	3%	1%	
Cultural Aspects/ Cultural Activities/	3%	1%	
Lived in state or have relatives there	2%	8%	
Sports/outdoor activities/snow sports/golf	2%	3%	
Miscellaneous	9%	5%	

Q43a: What is most appealing to you about taking a trip to Oregon?





Cultural and Heritage Awareness

For Both CH and Non-CH Travelers, Las Vegas, NYC, and Portland were Top Destinations. California Tops the List of States

Top 10 States Visited	CH	Non-CH
California	29%	22%
Washington	21%	21%
Nevada	19%	14%
Oregon	18%	13%
Idaho	12%	9%
Utah	11%	7%
New York	10%	7%
Florida	9%	4%
Arizona	8%	1%
Montana	8%	3%

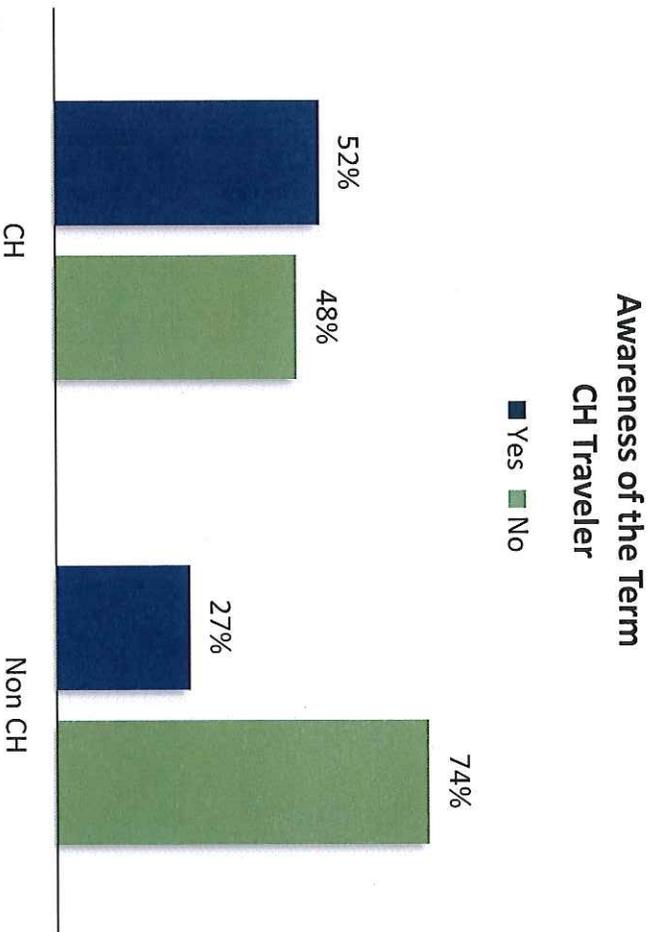
2012 Oregon CH Travelers were most likely to visit California and Washington on their most recent leisure trip. The number of CH travelers to California is somewhat higher than Non CH travelers. A similar gap exists with Nevada and Oregon.

Seattle and LA destinations attracted a greater number of CH travelers than Non-CH travelers.

Top 10 Cities Visited	CH	Non-CH
Las Vegas	12%	12%
Seattle	9%	5%
Los Angeles	8%	3%
New York City	8%	7%
Portland	7%	7%
San Francisco	6%	3%
San Diego	5%	1%
Reno	3%	2%
Salt Lake City	3%	1%
Newport	3%	1%

- Q6: The term cultural and/or heritage traveler is sometimes used to describe certain types of leisure travelers. Have you ever heard this term?
 Q9. Thinking about your most recent trip, what state(s) did you visit?
 Q10. And thinking about your most recent trip, what city or cities did you visit?

Just Over Half of Cultural and Heritage Travelers Are Aware of the Term Cultural/Heritage Traveler



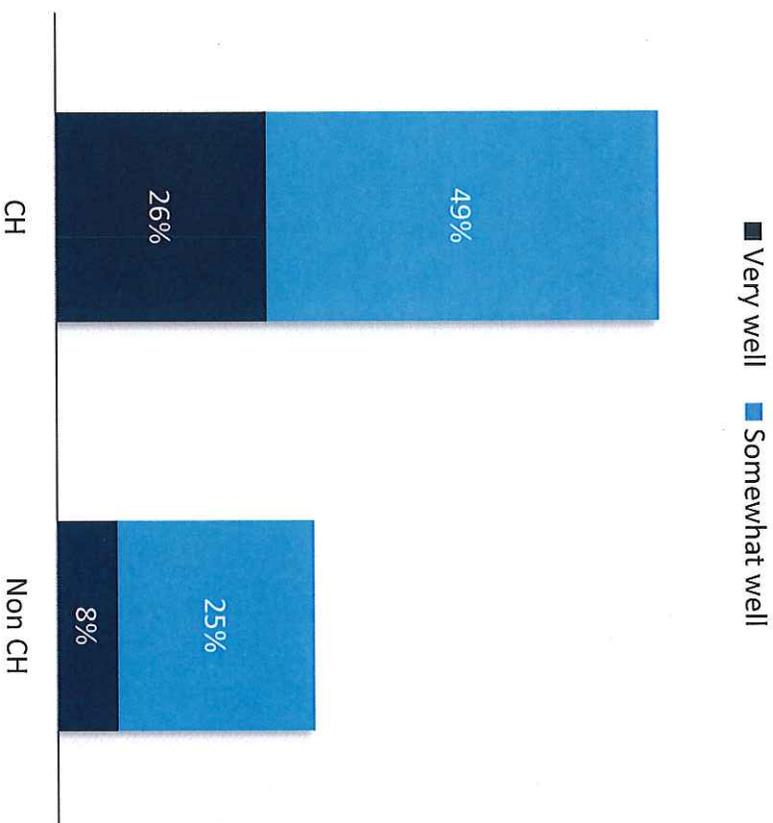
An additional 16% of CHTs in the Oregon study have heard of the term CH Traveler compared to the 2009 National CHT Study.

[Q6 – AWARENESS] The term “cultural and/or heritage traveler” is sometimes used to describe certain types of leisure travelers. Have you ever heard of this term?



Three-Fourths of Cultural and Heritage Travelers Identify with Definition of Being a Cultural and Heritage Traveler

Definition



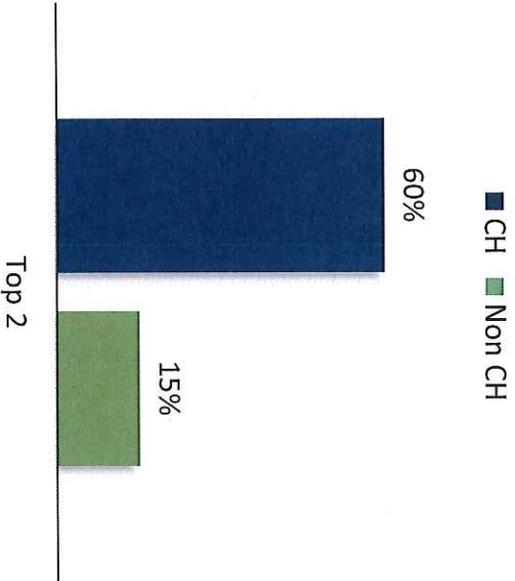
Oregon travelers identify themselves with the definition of CH traveler at rates comparable to the 2009 National findings.

[Q31 – DEFINITION] Some people may describe a cultural and/or heritage traveler in the following way: “a person who travels to experience the places, people, activities, and things that authentically represent the past and present, including cultural, historic, and natural resources.” How well does this describe you as a traveler?



Cultural and Heritage Travelers Are 4 Times More Likely to Take a Trip Defined by Cultural and Heritage Activities Than Are Non-CH Travelers

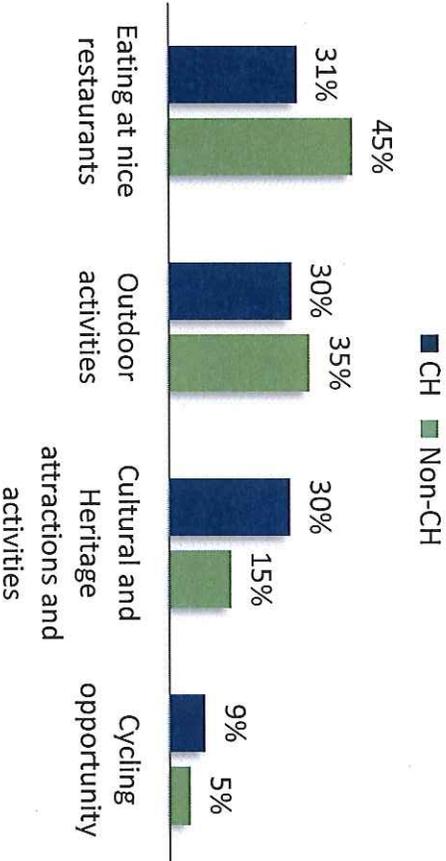
Likelihood of Taking CH Trip



Compared to 2009 National Study, a greater percentage of cultural and heritage travelers are more likely to take a CH trip than are non-CH travelers.

Eating at nice restaurants and outdoor activities are ranked higher in importance by Non-CH travelers than CH travelers.

Ranking Importance When Planning Vacation



Q39: How likely are you to take a cultural and/or heritage trip in the next 12 months N=2000
 Q40: When planning your vacation which of the following is most important to you and which is least important Please rank the following N=2000



Activities



Considerable Differences Separate Those Activities Considered to be Cultural and Heritage by CH and Non-CH Travelers

Top 25 Activities Considered CH Activities		CH	Non CH
Visited heritage buildings/historical buildings	49%	36%	
Visited Native American sites	48%	35%	
Attended cultural and/or heritage fair or festival	47%	37%	
Attended historical re-enactments	47%	34%	
Participated in an organized tour of local history or culture	46%	32%	
Visited historic sites	46%	35%	
Visited living history museums	44%	34%	
Visited natural history museums/centers	43%	30%	
Visited history museums/centers	43%	36%	
Visited art museums/galleries	42%	32%	
Took a tour focusing on local architecture	39%	29%	
Researched family history	39%	27%	
Attended an art/craft fair or festival	33%	26%	
Shopped for items made by local artisans and craftspeople	33%	24%	
Visited science museums/centers	32%	26%	
Visited children's museums	30%	25%	
Visited farms and ranches	28%	22%	
Explored small towns	27%	21%	
Attended the theatre/play/opera (live performance)	26%	16%	
Attended a professional dance performance (ballet & other forms)	26%	17%	
Visited "Hall of Fame" museum (sports, rock'n'roll, etc.)	25%	19%	
Sampled traditional artisan products (e.g. cheeses, candies, jams, etc.)	24%	19%	
Attended live classical music performance	24%	16%	
Experienced local or regional cuisine for a unique and memorable experience (Oregon fine dining)	24%	17%	
Self-guided walking tour	22%	18%	

Q20. For the following activities, please indicate which you consider to be cultural and/or heritage activities.



CH Travelers Were Substantially More Likely Than Their Non-CH Counterparts to Partake of Both Outdoor Activities and Shopping

Top 25 Activities Done on Most Recent Trip	CH	Non CH
Took a scenic drive	56%	23%
Shopped (general, not locally made crafts/memorabilia)	54%	32%
Explored small towns	44%	17%
Self-guided walking tour	42%	16%
Visited beaches/waterfronts	39%	23%
Shopped at an outlet mall	39%	12%
Shopped for items made by local artisans and craftspeople	38%	13%
Experienced local or regional cuisine for a unique and memorable experience (not fine dining)	34%	12%
Went to a fine dining restaurant for a unique and memorable experience	33%	16%
Visited state/national parks	33%	8%
Visited heritage buildings/historical buildings	32%	4%
Visited a local farmers market	31%	7%
Visited historic sites	30%	7%
Explored urban neighborhoods	29%	8%
Visited art museums/galleries	29%	4%
Participated in night life	29%	11%
Sampled traditional artisan products (e.g. cheeses, candies, jams, etc.)	28%	3%
Gambled	25%	17%
Shopped for gourmet food and wine	24%	5%
Participated in sports (golf, hiking, biking, birding, boating/sailing, hunting, fishing, snow sports, etc.)	23%	10%
Visited history museums/centers	23%	1%
Attended an art/craft fair or festival	22%	6%
Shopped at museum stores	22%	3%
Visited natural history museums/centers	18%	1%
Visited theme or amusement parks	18%	8%

Q20. For the following activities, please indicate which you have done on your most recent trip?

CH Travelers Participate in a Wide Variety of Activities at Higher Rates than Non-CH Travelers

Top 25 Activities Done in Past 3 Years	CH	Non CH
Visited state/national parks	48%	13%
Visited beaches/waterfronts	47%	23%
Took a scenic drive	47%	21%
Shopped at an outlet mall	45%	15%
Visited art museums/galleries	44%	9%
Visited historic sites	44%	7%
Explored small towns	43%	17%
Shopped (general, not locally made crafts/memorabilia)	43%	24%
Visited a local farmers market	43%	16%
Visited zoos	43%	9%
Visited heritage buildings/historical buildings	42%	7%
Attended an art/craft fair or festival	42%	11%
Visited theme or amusement parks	41%	11%
Camped	41%	15%
Shopped for items made by local artisans and craftspeople	40%	16%
Went to a fine dining restaurant for a unique and memorable experience	40%	15%
Visited aquariums	40%	12%
Visited history museums/centers	40%	2%
Attended a live music performance	39%	9%
Visited science museums/centers	39%	4%
Participated in sports (golf, hiking, biking, birding, boating/sailing, hunting, fishing, snow sports, etc.)	37%	12%
Self-guided walking tour	37%	10%
Attended sporting events (professional, minor league, college, recreational leagues)	36%	8%
Experienced local or regional cuisine for a unique and memorable experience (Oregon fine dining)	36%	7%
Sampled traditional artisan products (e.g. cheeses, candies, jams, etc.)	36%	4%

Q20. For the following activities, please indicate which you have done on a leisure trip within the past three years?



While Cultural and Heritage Travelers Vehemently Agree with These Statements, Non CH Travelers Are Much More Lukewarm

Behaviors	CH	Non CH
I prefer taking trips that are a combination of a wide variety of activities such as culture/ shopping/nature/exercise	83%	42%
I like to bring back local/regional memorabilia from the places I visit and share them with my friends and family	78%	48%
I believe tasting foods/wines of the region I'm visiting is an important part of the cultural and/or heritage travel experience	73%	38%
I seek travel experiences where the destination its buildings and surroundings have retained their historic character	70%	31%
I like to pursue a life of challenge novelty and change	66%	32%
I want my travel to always be educational so I make an effort to explore and learn about the local arts culture environment	62%	18%
I am willing to pay more for travel experiences that do not harm the environment	58%	31%
I spend more money on cultural and/or heritage activities while I am on a trip	51%	15%
I would pay more for lodging that reflects the cultural and/or heritage destination I am visiting	46%	16%
I often giveback by donating money volunteering etc to the cultural and/or heritage destinations I have visited while on vacation	43%	8%

CH Travelers also like to partake in regional food and wine activities; two of Oregon's "sweet spots"

In general, a higher percentage of 2012 Oregon CH travelers agree with these statements than 2009 National CH travelers.

[Q29 – BEHAVIORS] Please indicate how strongly you agree with each of the following as they apply to your leisure travel.

Biggest Gaps in Factors Impacting Trip Activities Between CH and Non-CH Travelers Are the Desires to Explore and Learn About Local Cultures

Motivators	CH	Non CH
Relaxing and relieving stress	91%	80%
Creating lasting memories	90%	73%
Trying a new experience	87%	54%
Enriching my relationship with my spouse/partner/children	82%	63%
Having stories to share back home	75%	48%
Explore a different culture	75%	13%
Learning more about history and local cultures	75%	27%
To stimulate your mind/be intellectually challenged	74%	36%
Pursuing outdoor recreational activities	68%	42%
Pampering yourself	67%	49%
Pursuing a hobby	55%	33%
Providing educational experiences for my children	53%	23%
Seeking out solitude and isolation	53%	42%
Challenging myself physically to feel physically energized	51%	22%

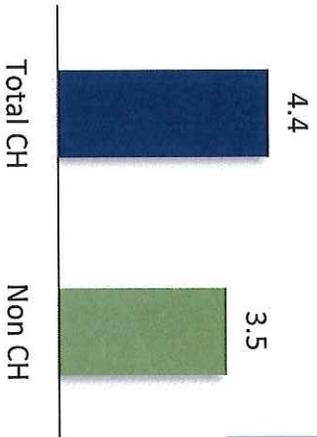
In terms of motivators, Oregon CH travelers mirror their 2009 national CH traveler counterparts

[Q30 MOTIVATOR] How important are each of the following factors when choosing the types of activities you do on a leisure trip?



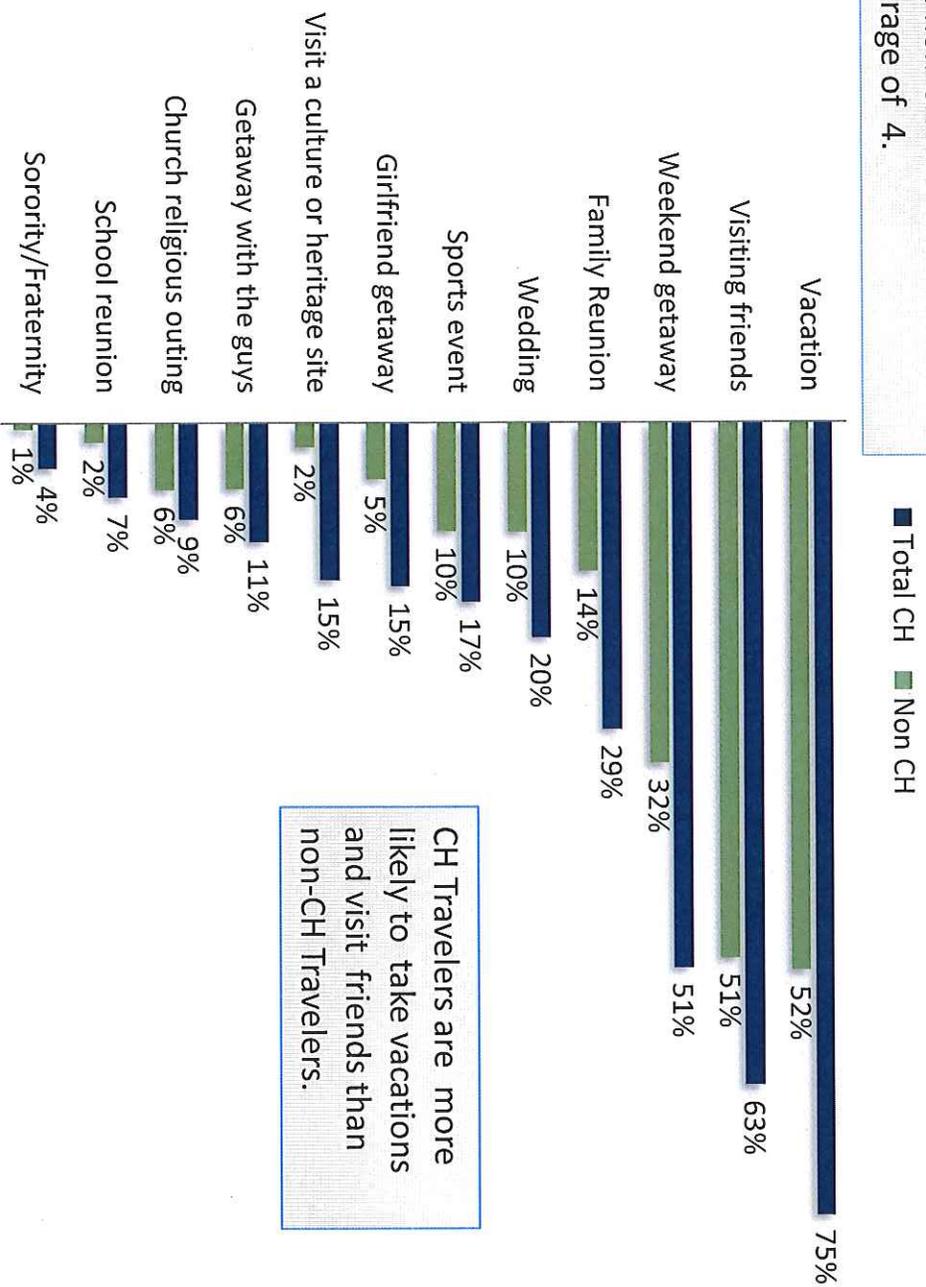
CH Travelers Take Significantly More of Every Type of Trip and Their Dwell Time is Longer

Average Number Leisure Trips



2009 National CH travelers took an average of 5 leisure trips and non-CH Travelers took an average of 4.

Types of Trip



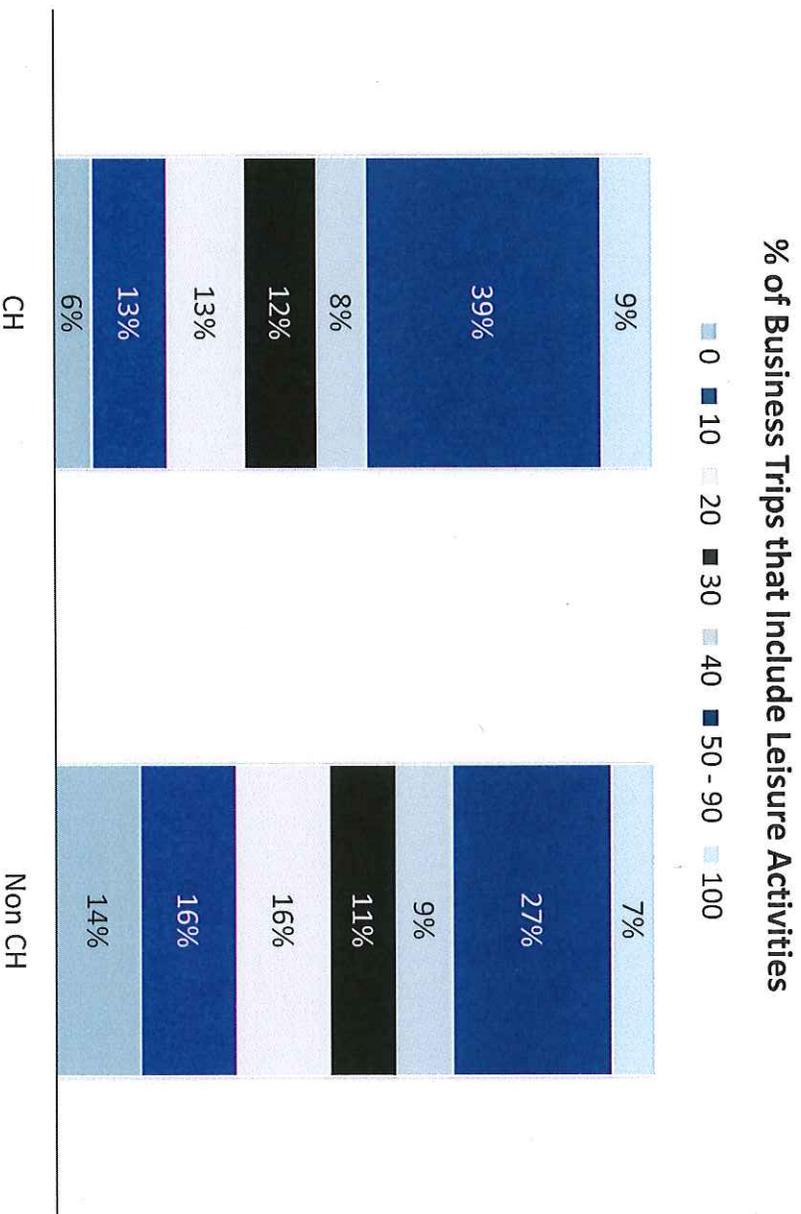
CH Travelers are more likely to take vacations and visit friends than non-CH Travelers.

Total CH Combined Trips: 2.5
 Non CH Combined Trips: 1.5

National, CH traveler .99, and Non-CH travelers .31

S1 1: Leisure pleasure vacation or personal purposes within the US
 S1 3: Combined business and leisure within the US
 S1b: And which of the following types of trips have you taken in the past 12 months Choose as many as apply

CH Travelers Are More Likely to Include Personal Leisure Activities in the Majority of Their Business Trips



S3: What percentage of your domestic business travel includes personal leisure activities?



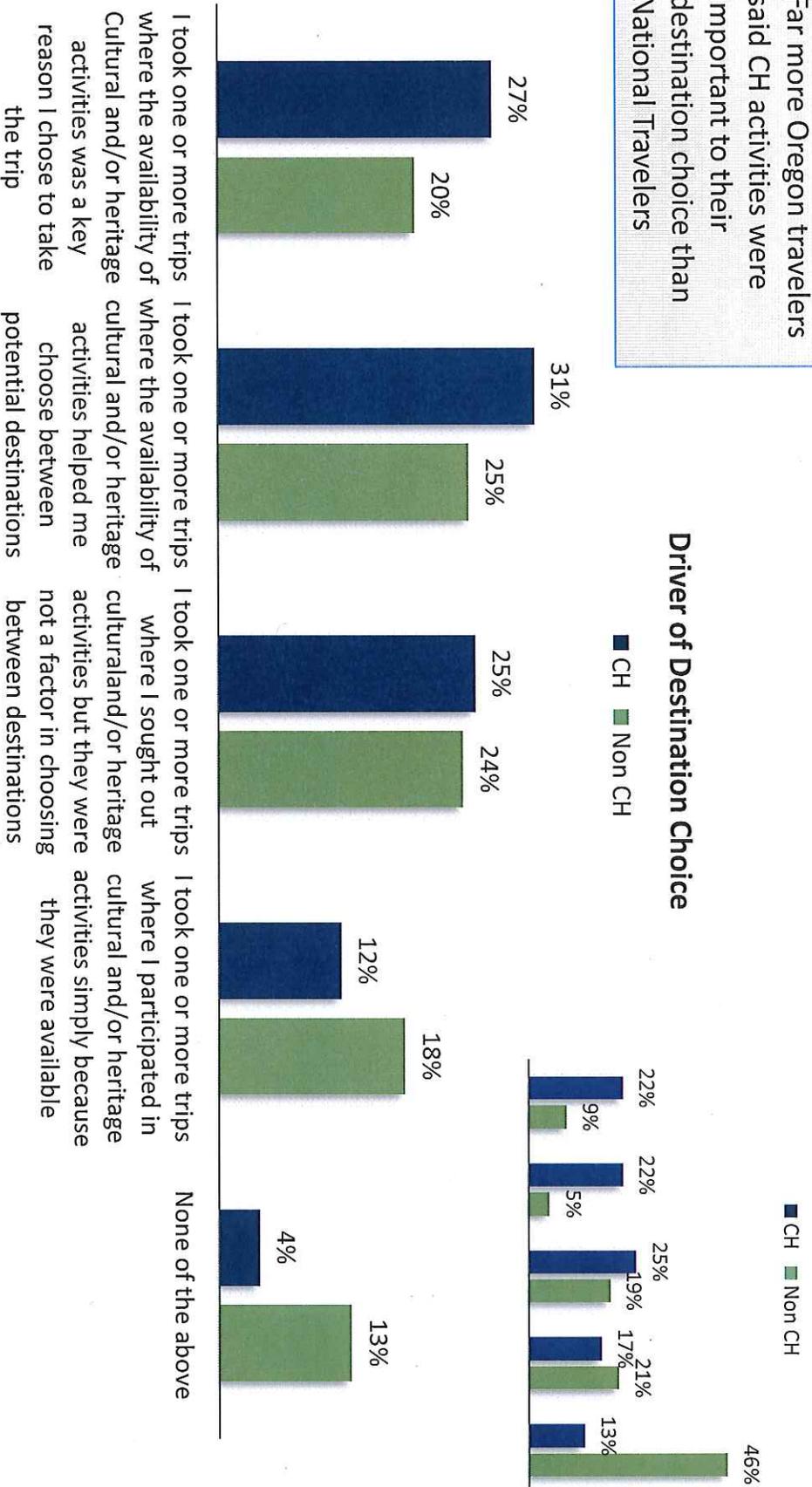
Drivers of Destination Choice



For CH Travelers, Cultural and Heritage Activities Are Greater Drivers of Destination Choice Although the Gap Is Narrower Than the National Sample, It Is Still Statistically Significant

Far more Oregon travelers said CH activities were important to their destination choice than National Travelers

Driver of Destination Choice



[Q38 – DRIVER OF DESTINATION CHOICE] Now, thinking about all the trips you have taken over the past three (3) years in which you participated in cultural and/or heritage activities, which statement best describes you?



Both CH and Non-CH Travelers Plan Their Travel with a Desired Destination in Mind

First Step in Selecting Destination	CH	Non-CH
Sample Size	1662	337
Started with a desired destination(s) in mind	64%	67%
Started considering specific events you wanted to do	24%	15%
Started with a certain type of travel experience in mind	24%	12%
Started with dates in mind, no particular destination in mind	16%	6%
Looked for packaged deals – no destination in mind	10%	4%
Don't Know/Rather not say	2%	5%
Other please specify	4%	9%

Those CH travelers who considered specific events they were interested in as a first step when selecting the destination for their most recent trip is 5% lower than the 2009 National Study. This seems realistic given the percent of CH travelers who are planning activities and attractions once they get to their destination.

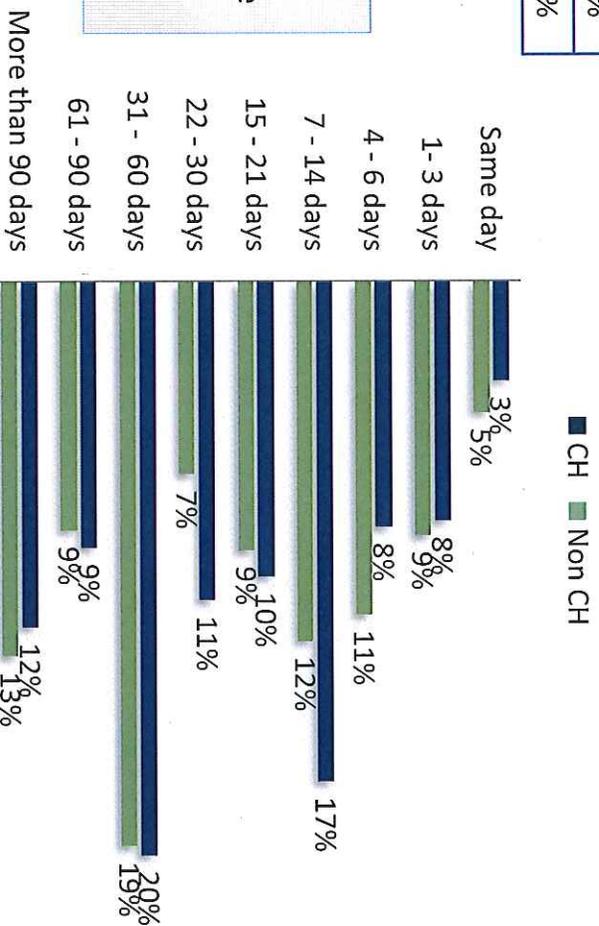
Q11: What was your first step when selecting the destination of this most recent trip? Please select all that apply

Q12: Thinking of your most recent trip how far in advance of your departure date did you start booking the trip

Oregon 2012 CH Travelers are slightly more likely to book their trip 7 to 14 days in advance than are non-CH Travelers

57% of travelers, compared to 44% in the 2009 National Study, booked their last trip within a month of taking the trip.

Booking Their Trip



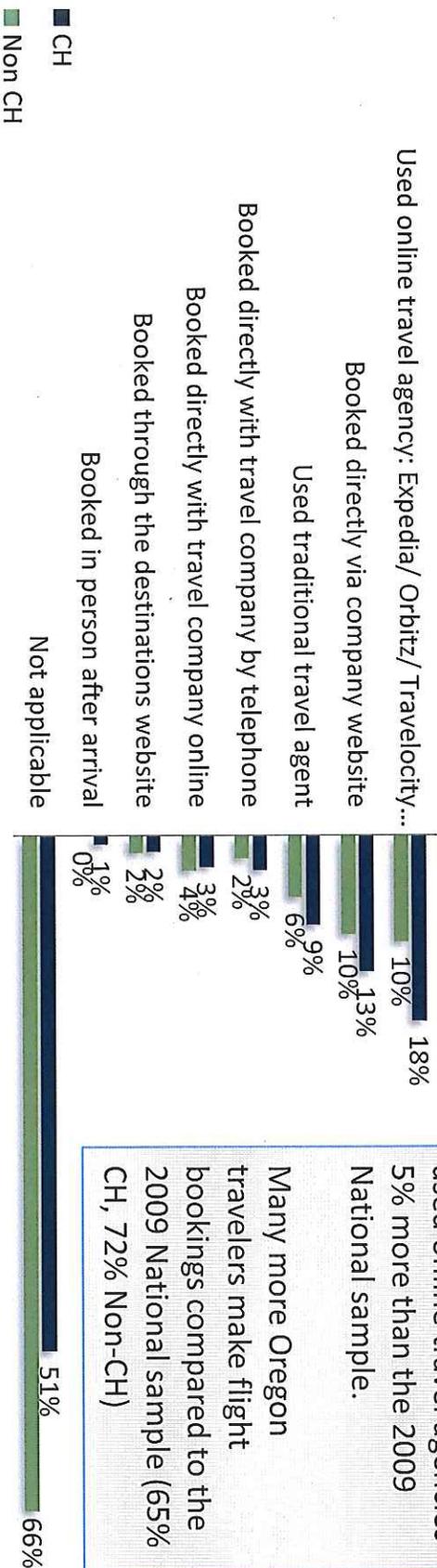


Booking Behavior

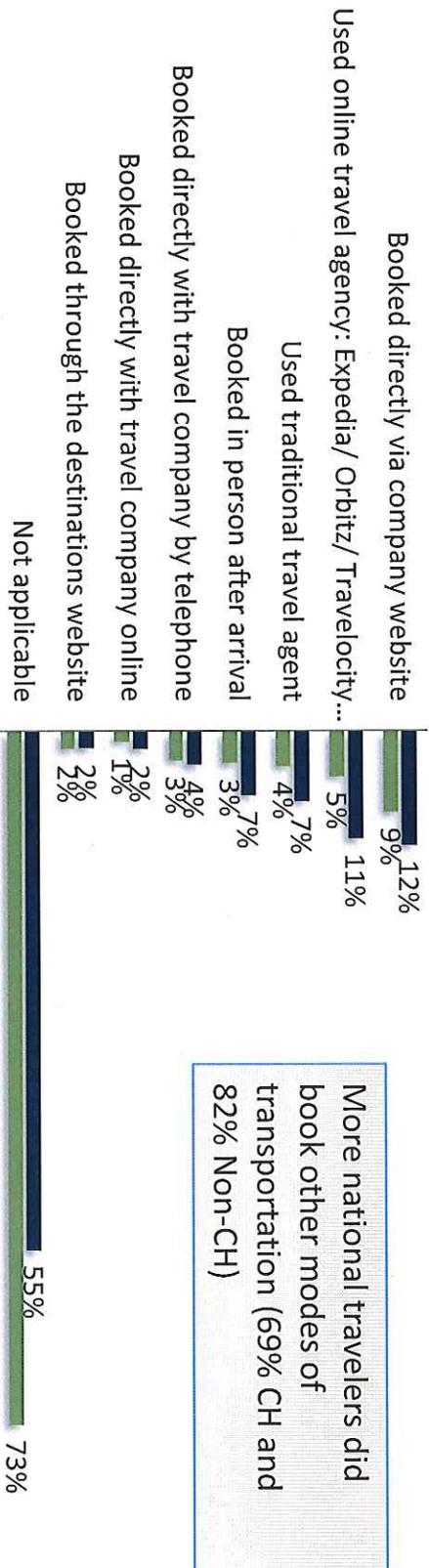


Very Small Percentages of All Travelers Take Advantage of Booking Their Trip Through the Destination Website

Flight Booking



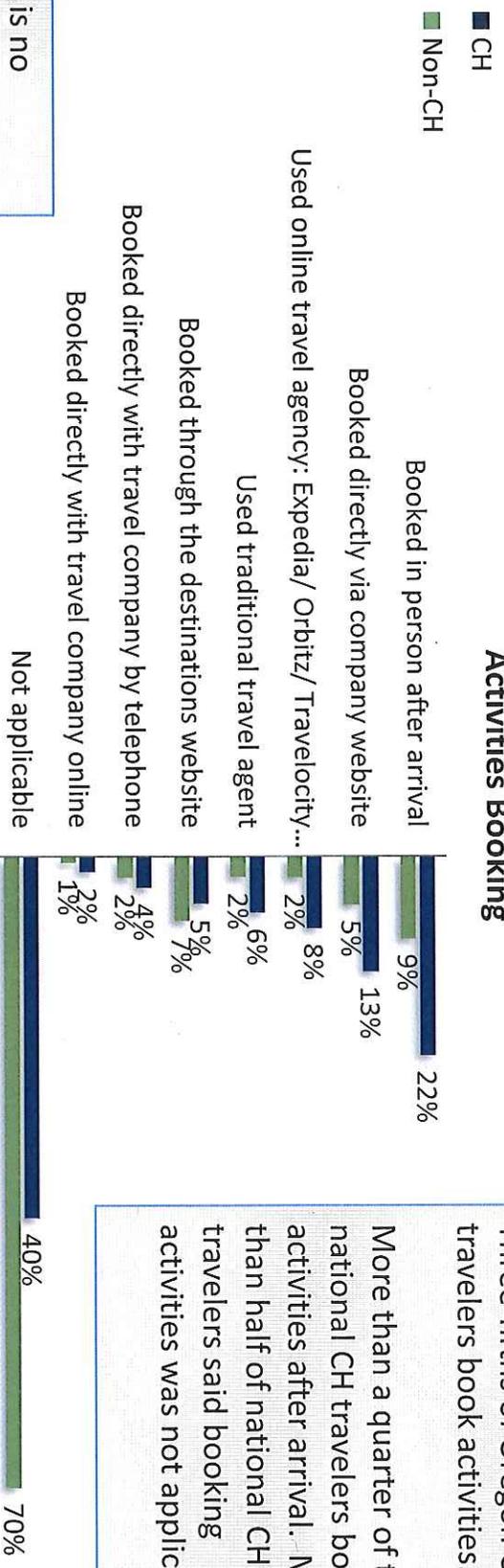
Transportation Booking



Q23 Now, for each of the following you may have used for this most recent trip, please indicate how each one was booked

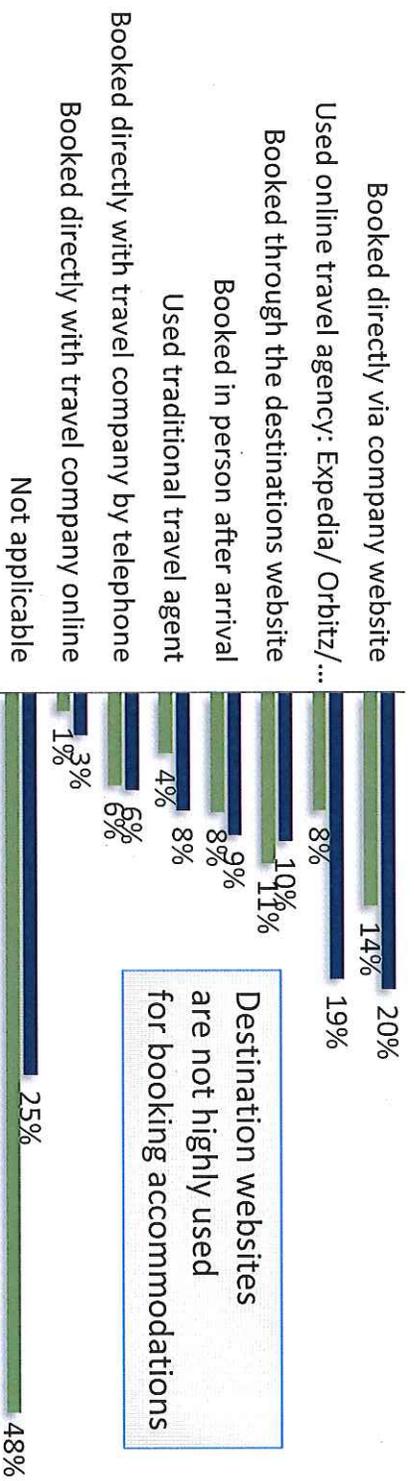
An Opportunity Exists to Promote Oregon Activities Locally Once a Traveler Arrives in Oregon

Activities Booking



Three-fifths of Oregon CH travelers book activities. More than a quarter of the national CH travelers booked activities after arrival. More than half of national CH travelers said booking activities was not applicable.

Accommodations Booking



Destination websites are not highly used for booking accommodations

There is no statistical difference in method of booking activities and accommodation in 2012 compared to the 2009 National sample. However, for over one-third of the national CH travelers, booking lodgings was not applicable.

Q23 Now, for each of the following you may have used for this most recent trip, please indicate how each one was booked.

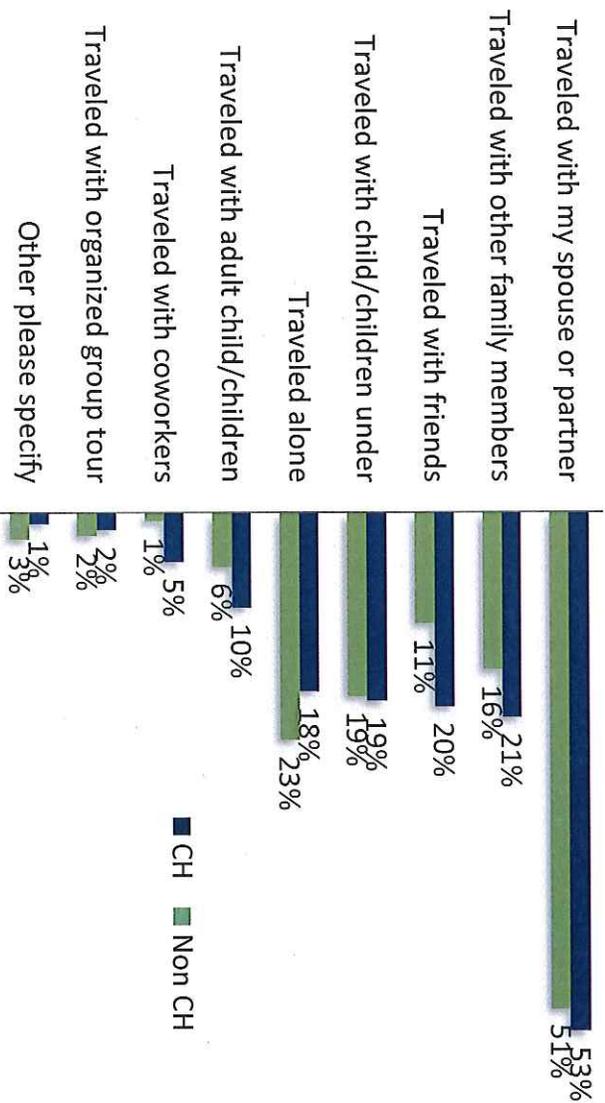


Travel Party Composition



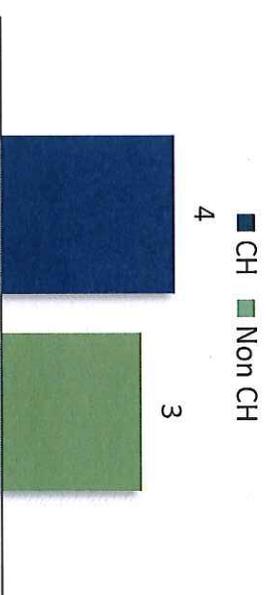
CH Travelers Tend to Have a Larger Travel Party and More Household Members in Their Party than Non-CH Travelers

With Whom They Traveled



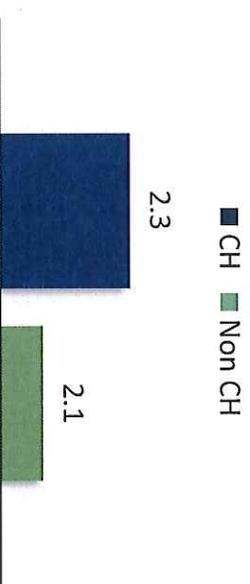
There are marginal differences between travel companions in the National Study versus the 2012 Oregon study except a somewhat smaller percentage in 2012 are traveling with other family members; economics may play a key factor here.

Average Travel Party



2009 National Study is consistent with 2012 Oregon findings in terms of travel party size and composition.

Average HH Members in Travel Party



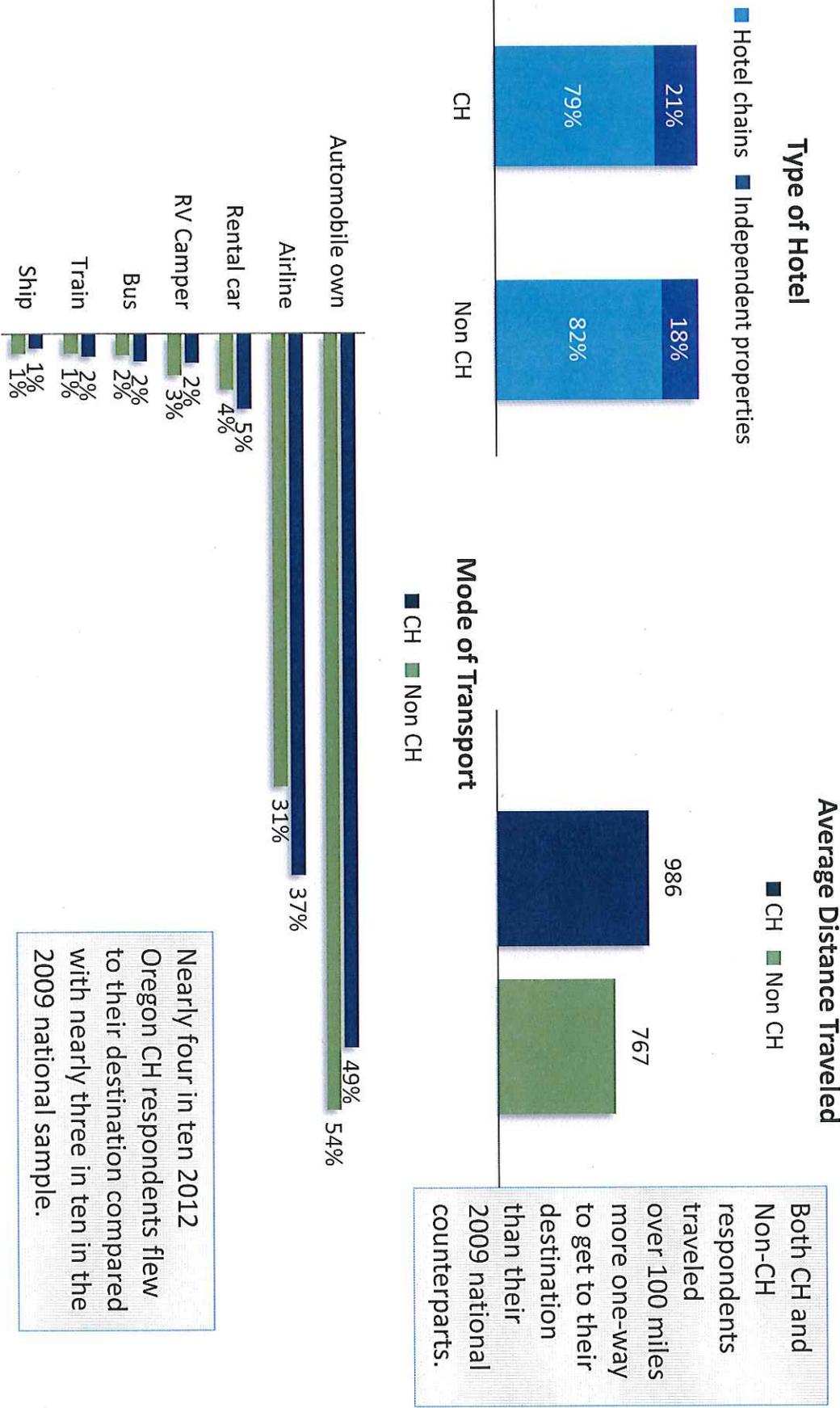
Q13A: And with whom did you travel on this most recent trip Please select all that apply
 Q13B: Including yourself, how many people were in your travel party on this most recent trip? Please include people from your household and friends/family who accompanied you but not those whom you met as part of a group tour?
 Q13C: And including yourself how many people from your household were on this most recent trip?



Trip Characteristics



CH Respondents Are More Likely to Travel Further to Get to Their Destinations and More Likely to Travel by Air



Both CH and Non-CH respondents traveled over 100 miles more one-way to get to their destination than their 2009 national counterparts.

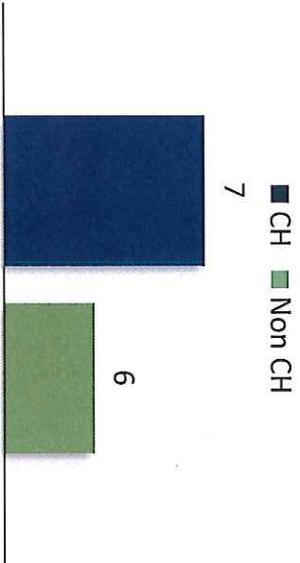
Nearly four in ten 2012 Oregon CH respondents flew to their destination compared with nearly three in ten in the 2009 national sample.

Q17A: When you travel for leisure do you prefer to stay in hotel chains or in independent properties
 Q18: On your most recent trip how far did you travel from your home one-way to get to this destination? If you're not sure provide your best estimate.

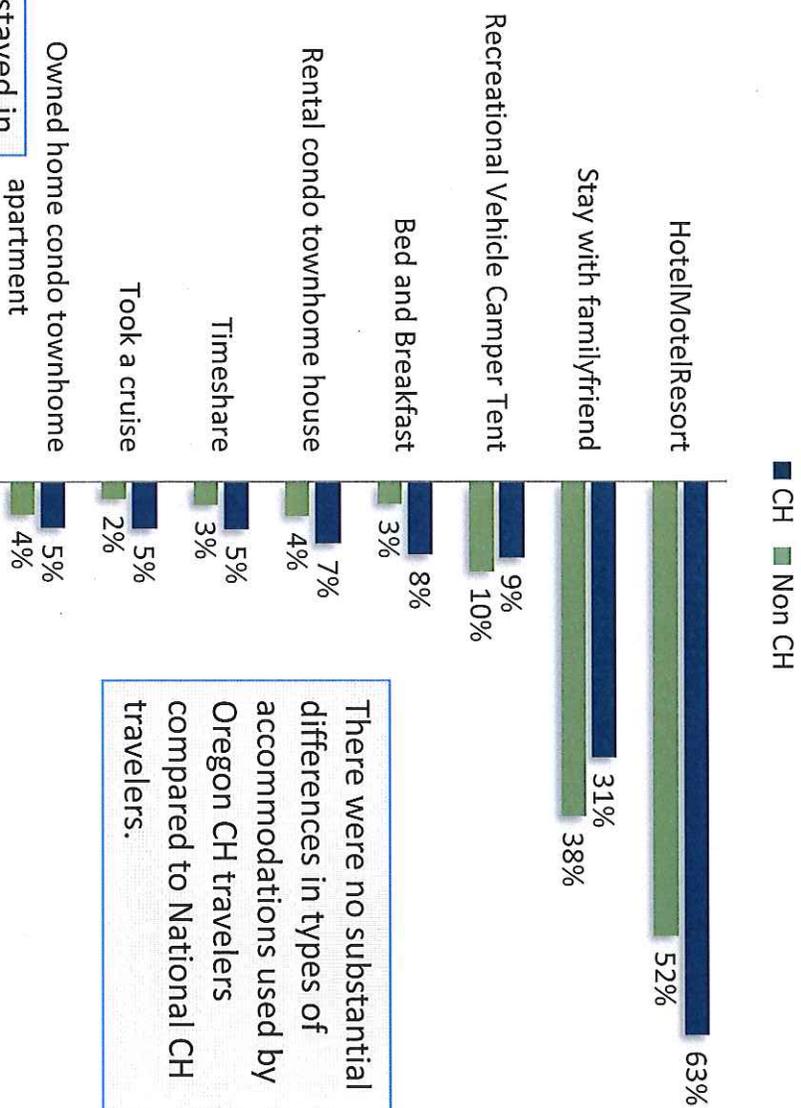
Nearly Half of CH Travelers Stayed Five or More Nights on Their Most Recent Trip

Oregon CH travelers stay on average one additional night longer than national CH travelers.

Average Number of Nights

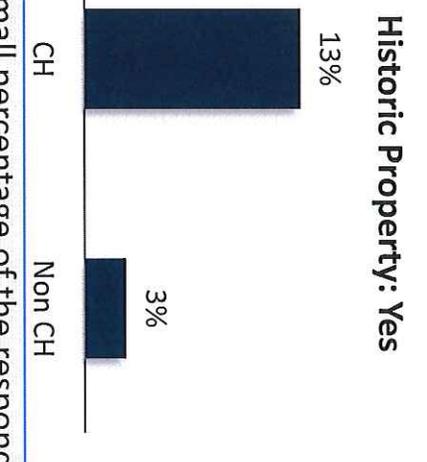


Type of Accommodation



There were no substantial differences in types of accommodations used by Oregon CH travelers compared to National CH travelers.

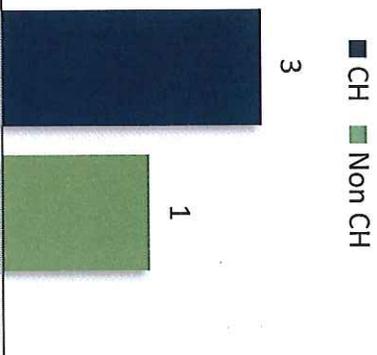
A very small percentage of the respondents stayed in a historic property on their most recent leisure trip but slightly higher than their national counterparts in the 2009 National survey.



Q14: How many overnights did you stay while on this trip? If your trip was just a day trip
 Q15: And at which of the following accommodations did you stay during this most recent trip
 Please select all that apply

Non-CH Travelers Are More Likely to Take Weekend Trips While CH Travelers Enjoy Week Long Trips

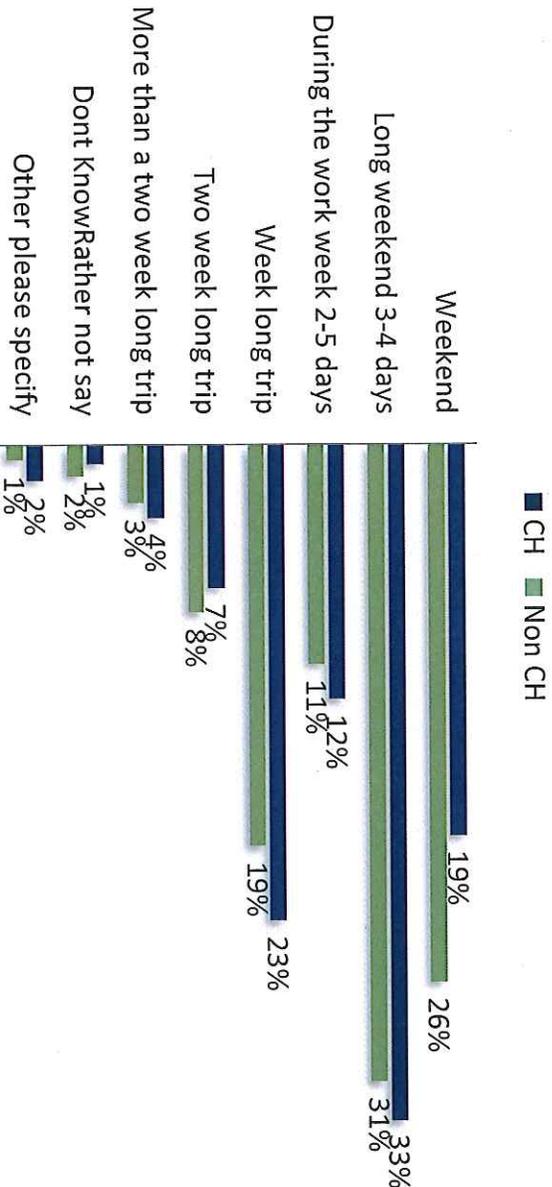
of Trips Considered to be a CH trip



National Travelers consider slightly fewer of their trips to be CH trips.

Oregon travelers take slightly longer trips than 2009 National sample counterparts.

Length of CH Trip



Q36: Thinking about the [insert Q51, Response 1 & 3 answer] leisure trips you took in the US in the past 12 months, how many of those would you describe as cultural and/or heritage trips?
 Q37: Typically how long are your cultural and/or heritage trips?





Spending



CH Travelers Spent Considerably More Overall During Their Most Recent Leisure Trip Than Non-CH Travelers

Average Spend Per Trip



Oregon CH travelers in 2012 spent an average of \$546 (adjusted for inflation) more per trip than their national counterparts; non-CH Oregon travelers spent an average of \$436 (adjusted for inflation) more.

CH Travelers outspent their counterparts on transportation, meals and shopping

Spending Breakdown



Q21: About how much would you say you personally spent on this most recent trip including transportation lodging entertainment, shopping?
 Q22_1: How much did you spend on each of the following Please include spending on activities that you paid for even if they were for other people?

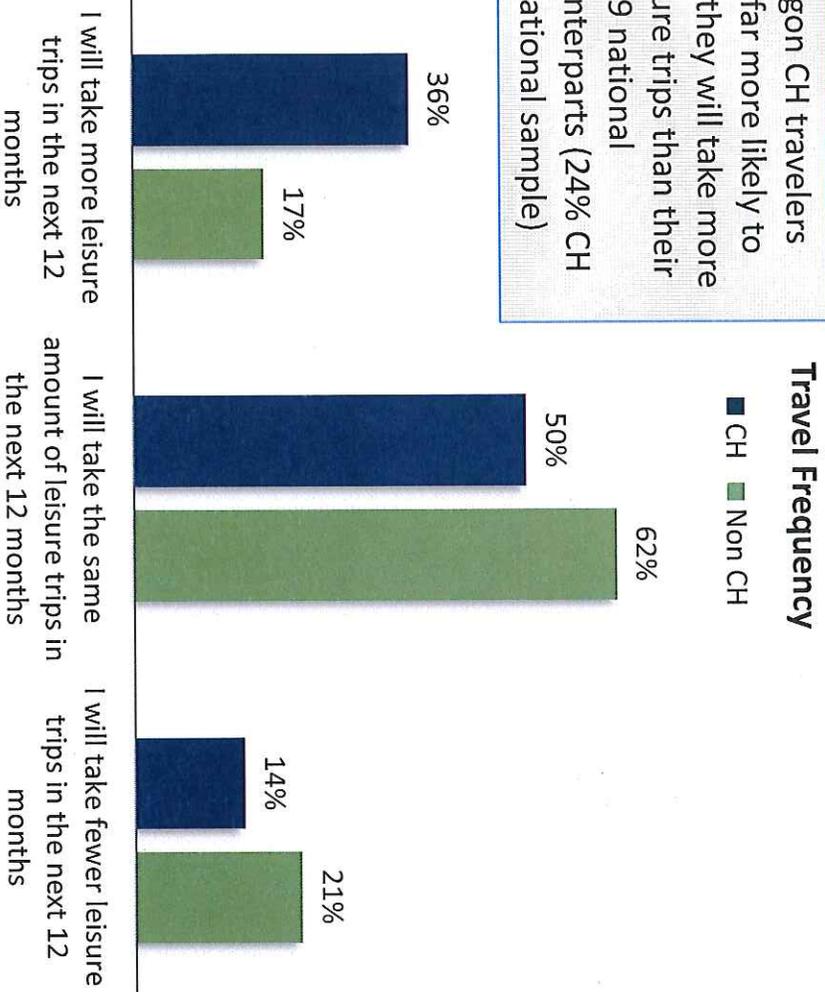


Future Travel



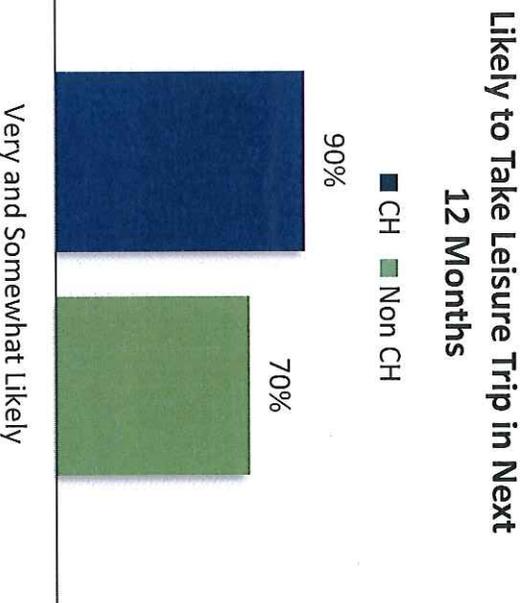
CH Travelers Are Most Likely to Take More Leisure Trips in the Next 12 Months

Oregon CH travelers are far more likely to say they will take more leisure trips than their 2009 national counterparts (24% CH in national sample)



In the 2009 National study, 81% CH travelers and 70% non-CH travelers were likely to take a leisure trip in the next 12 months.

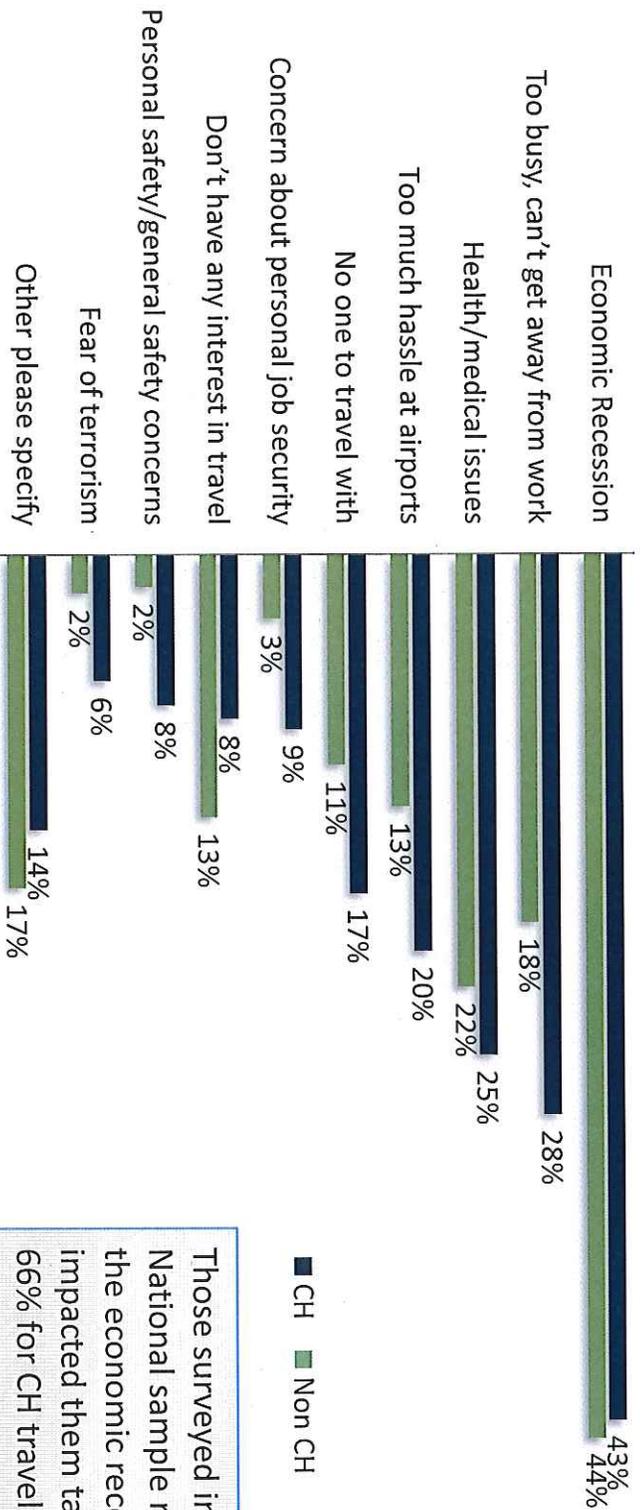
The percent of people saying they will take fewer trips is lower for both CH and Non-CH travelers perhaps due to the improving economy (National sample 26% CH travelers and 34% Non-CH travelers).



Q25: Thinking about your past travel in a typical year would you say you will take more leisure trips the same amount of trips or fewer trips in the next 12 months
 Q26: How likely are you to take a leisure trip in the next 12 months?

Pure Economics, Including Take Time Away from Work and Job Security, Are the Key Barriers to Taking a Leisure Trip in Next Year

Impact on Taking a Leisure Trip



■ CH ■ Non CH

Those surveyed in the 2009 National sample reporting it was the economic recession that impacted them taking a trip was 66% for CH travelers and 70% Non-CH travelers.

Of the National sample, one-fifth said they were too busy to travel and one-fifth said they had health or medical issues.

Q27: Which of the following if any has an impact on your taking a leisure trip in the next 12 months CH N=159, Non CH N=88





Information Sources



Word-of Mouth and the Use of Search Engine Optimization Technology Will Assist Greatly in Getting the Word Out on Oregon

Big differences exist between how travelers plan their trips and how they actually book them. There is an opportunity for marketers to correct this disconnect.

Sources of Information	CH	Non CH	
	Sample Size	1662	337
I go directly to the websites of the destination I am thinking of visiting	62%	41%	
I get recommendations from friends and family members (word-of-mouth)	59%	44%	
I conduct a general web search, such as with Google or Yahoo	56%	32%	
I do research on 3rd party travel websites such as Orbitz.com, Expedia.com or Travelocity.com	37%	21%	
I read online reviews by "official sources" of the destination I am thinking of visiting	31%	14%	
I read user generated sources (Trip Advisor, Virtual Tourist, etc.) for the destination I am thinking of visiting	26%	12%	
I read travel and travel related magazines	23%	8%	
I request that brochures and information be sent to me in the mail of the travel destinations I am thinking of visiting	21%	12%	
I read independently published reviews in magazines and newspapers of the destination I am thinking of visiting	17%	5%	
I ask my friends on Facebook	17%	5%	
I read the travel section of my newspaper	17%	7%	
I consult with a travel agent	14%	8%	
I contact convention and visitors bureaus	11%	4%	
I do a search on Facebook	6%	1%	
Other	4%	14%	

60% National CH travelers go directly to the website of destination for planning information.
 57% of 2009 of National CH travelers took recommendations from friends and family.

Q28: How do you typically gather information about leisure trips you plan to take within the United States?



Publications Read



Travel Related Magazines, Such as National Geographic, Are Much More Likely to be Read by CH Travelers

Similarly, in 2009 National study, cultural and heritage travelers were more likely to read newspapers and magazines than their counterparts.

Publications Typically Read On Line or Print	CH	Non CH
Sample Size	1661	337
Community newspaper	46%	39%
News magazines	38%	19%
Entertainment magazines	38%	21%
Travel related magazines	37%	13%
General interest, city life or regional magazines	32%	11%
Hobby related magazines	32%	19%
Food/Wine related magazines	30%	12%
National newspaper	29%	13%
Fashion/homemaking magazines	29%	16%
Sports related magazines	27%	15%
History related magazines	23%	6%
Cultural related magazines	18%	3%
Financial magazines	17%	11%
Other	8%	18%

Oregon Coast Magazine has better placement opportunities for CH than non-CH travelers.

Of those who typically read travel magazines in the 2009 National Study, Travel + Leisure topped the list.

Types of Publication	CH	Non CH
Sample Size	614	44
National Geographic	49%	12%
Travel + Leisure	46%	39%
AAA Magazines	40%	42%
National Geographical Traveler	31%	9%
Sunset	29%	25%
Vacations	26%	14%
Coastal Living	24%	12%
Oregon Coast Magazine	22%	4%
Northwest Travel Magazine	17%	5%
Condé Nast Traveler	16%	18%
Outside	14%	4%
Travel 50 & Beyond	13%	5%
Portland Monthly Magazine	10%	3%
None of the above	4%	12%
Other	3%	12%

Q32: Which of the following types of publications do you typically read either in print or online?
 Q32A: Which of the following types of travel publications do you typically read, either in print or online?



Specialty Publications Such as Smithsonian Magazine and National Geographic are Good Marketing Targets for CH Travelers

Food and Wine Publications	CH	Non CH
Sample Size	503	39
Food & Wine	47%	37%
Bon Appétit	46%	34%
Better Homes and Gardens	45%	41%
Food Network Magazine	40%	35%
Cooking Light	33%	21%
Gourmet	32%	12%
Family Circle	30%	17%
Cooks Illustrated	26%	12%
Wine Spectator	20%	14%
Sunset Pacific NW edition	18%	13%
Vegetarian Times	14%	9%
The Wine Advocate	13%	4%
Saveur	12%	5%
All About Beer	12%	3%
Northwest Palate	10%	4%
Midwest Living	10%	0%
Intermezzo Magazine	6%	2%
None of the above	5%	12%
Other	6%	6%

In the 2009 National study, the same food and wine publications topped the list.

History Publications	CH	Non CH
Sample Size	381	21
Smithsonian	53%	23%
American History	46%	19%
History Channel Magazine	44%	38%
Natural History	40%	38%
Military History	33%	18%
World War II	32%	32%
Civil War Times	25%	6%
Good Old Days	20%	27%
Reminiscence	18%	12%
Preservation Magazine	17%	7%
Realm	12%	0%
Armchair General	10%	10%
None of the above	14%	27%
Other	4%	0%

In the 2009 National study, Smithsonian Magazine and the History Channel Magazine were the most read history publications.

- Q32B: Which of the following types of food/wine publications do you typically read either in print or online
- Q32C: Which of the following types of history publications do you typically read either in print or online
- Q32D: Which of the following types of cultural publications do you typically read either in print or online



A Large Gap Exists between Cultural and Heritage and Non-Cultural and Heritage in the Number Who Read Cultural Publications

Cultural Publications	CH	Non CH
Sample Size	292	9
National Geographic	75%	51%
Rolling Stone	45%	48%
Smithsonian	44%	42%
History Channel Magazine	41%	20%
The New Yorker	41%	8%
Sunset Magazine (Pacific NW Edition)	38%	31%
Gourmet Magazine	36%	15%
Southern Living	30%	9%
Oregon Coast Magazine	27%	0%
Art in America	26%	0%
Billboard	24%	0%
None of the above	6%	6%
Other	3%	0%

The top contenders for cultural magazines read in 2009 were National Geographic, Smithsonian Magazine and Southern Living.

Q32D. Which of the following types of cultural publications do you typically read, either in print or online?



Online Sources and Social Media

The Majority of CH and Non CH Travelers Are Regular Users of Facebook, Google and Youtube

Websites	Sample Size	CH	Non CH
Facebook.com	1661	68%	56%
Google.com	1661	67%	50%
Amazon.com	1661	54%	41%
Youtube.com	1661	54%	33%
Yahoo.com	1661	47%	38%
Ebay.com	1661	36%	29%
Mapquest.com	1661	31%	27%
MSN.com	1661	28%	16%
Expedia.com	1661	26%	10%
Google+	1661	26%	6%
Travelocity.com	1661	24%	9%
Twitter.com	1661	19%	8%
ESPN.com	1661	19%	9%
TripAdvisor.com	1661	19%	7%
CNN.com	1661	19%	7%
Bing.com	1661	18%	14%
Orbitz.com	1661	17%	5%
Pinterest.com	1661	17%	7%
Priceline.com	1661	15%	8%
HOregonwire.com	1661	14%	6%
Huffingtonpost.com	1661	13%	5%
LinkedIn.com	1661	13%	6%
Kayak.com	1661	12%	6%
National Geographic.com	1661	11%	1%
Yelp.com	1661	10%	4%

Social Networking Sites	Sample Size	CH	Non CH
Facebook.com	1661	79%	70%
Youtube.com	1661	47%	23%
Twitter.com	1661	21%	10%
Google.com	1661	20%	7%
Pinterest.com	1661	15%	6%
LinkedIn.com	1661	13%	6%
Yelp.com	1661	7%	3%
Instagram.com	1661	7%	2%
Flickr	1661	5%	2%
FourSquare	1661	4%	3%
Vimeo	1661	3%	2%
Other	1661	7%	19%

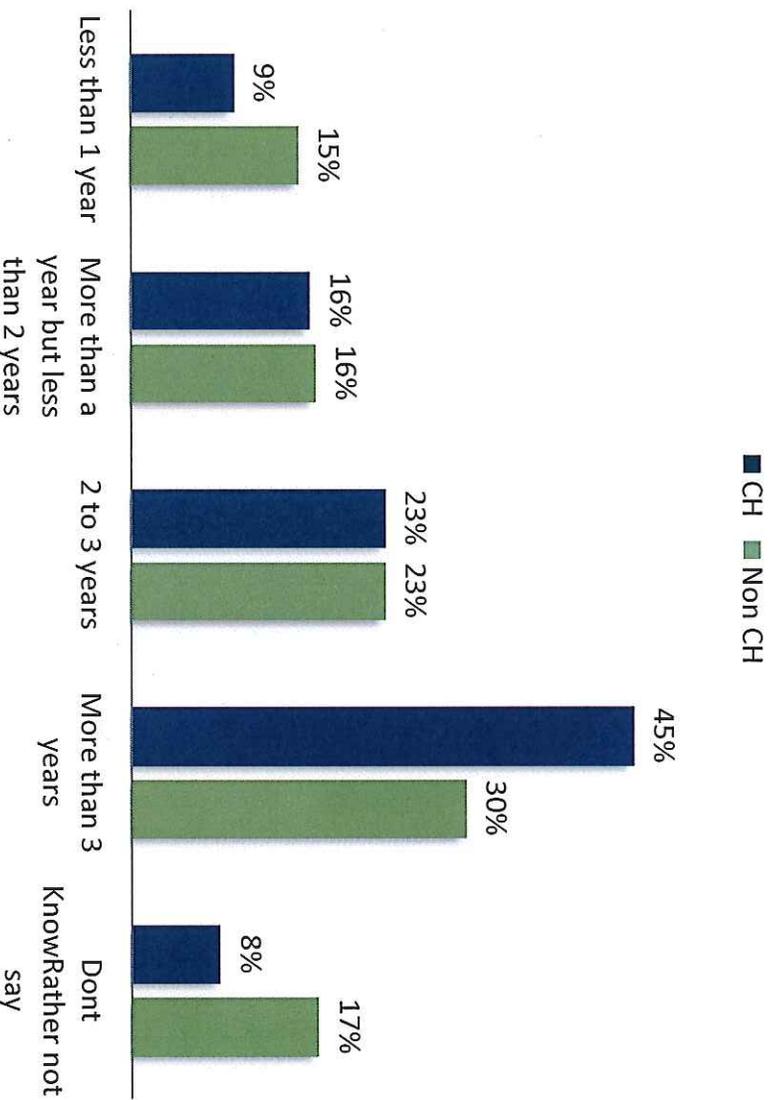
CH Travelers take advantage of social networking sites such as Facebook and Youtube—the largest video sharing site in the world and a cheaper and faster vehicle for marketers and advertisers

Yahoo.com has slipped from 2nd place in 2009 to 5th place in 2012 as a regularly visited Internet site. Facebook and Youtube, on the other hand, have risen significantly, especially among CH travelers in the past 3 years.

Q33: Which if any of the following internet sites do you regularly visit? Please select all that apply
 Q34: SOCIAL NETWORKING SITES Which of the following social networking sites do you use on a regular basis?

CH Travelers are Experienced Users of Social Media

Length of Time Using Social Media



Q35: How long have you used social networking sites?